Infor VISUAL CRM User's Guide

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Chapter 1: Introducing CRM

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Topic

About CRM

Welcome to CRM, an enterprise-wide Customer Relationship Management application that provides manufacturing companies with a software package to effectively support customer relationships. CRM applications automate the processes involved with customer relationships by integrating all aspects of customer service into one comprehensive tool, ensuring accurate data throughout the company and improving communication with customers and suppliers.

CRM integrates with Infor VISUAL software to tie “front office” functionality to the “back office” Enterprise Resource Management (ERP) functionality of VISUAL for a complete supply chain solution.

Using the User’s Guide

The CRM User’s Guide is a comprehensive guide that contains all of the information and procedures you need to work with CRM. It describes how each software component functions, the rules for its use, and how it relates to other components of CRM. During your evaluation and exploration process, you may want to focus on individual chapters or sections to discover how each application works, the functions it offers, and the decisions you need to make in its use. For example, you may be particularly interested in calls and issues.

Most chapters rely on information in other chapters to some extent. This is because CRM modules and features form a network of relationships with each other. You may want to first read the CRM Features Overview chapter to get a general idea of CRM features and capabilities.

Before beginning your CRM implementation, you should become familiar with all of the software components discussed in this manual, and how they work together.

Conventions and Symbols

This user’s guide uses certain conventions and symbols throughout this manual. The symbols call your attention to an event, procedure, or point of interest and make it easier for you to rapidly locate the information you need to view.

bold Plain text Indicates menu and button selections.

Note: The Note message indicates a shortcut or additional information about the feature or procedure.

Caution: The Caution message alerts users to functionality that can permanently alter your database. Please read these cautions thoroughly to prevent loss of information or unwanted or irrevocable actions.

Features Overview

Use these nine modules to manage and maintain relationships with customers and other contacts.

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Contact Center

The Contact Center module includes seven features that you can use to input account, contact, task, address, and note or history information, maintain a calendar of events, and navigate the Internet. All of the features in the Contact Center are integrated with each other and other applicable features within CRM, VISUAL Manufacturing, VISUAL Financials, Microsoft Outlook 2007 and higher, and Microsoft Word 2007 and higher. This list provides a brief description of each feature in the Contact Center:

CRM Today – The CRM Today window is displayed automatically when you open CRM. CRM Today opens a web document of your choice used to inform employees of important company information. You can also access the internet without leaving CRM. To specify your own CRM Today document. See “Maintaining Defaults,” on page 13–3.

Accounts – Create and maintain accounts for whomever you have a business relationship such as customer, distributor, prospect, and vendor. CRM Accounts contain detailed information about the holder including the account profile and addresses, shipment guidelines, contacts associated with the account, accounting information, sales representatives assigned to the account, and VISUAL and CRM user-defined fields.

CRM accounts can integrate with VISUAL, or function independently in CRM.

Contacts – The Contacts feature acts as an electronic address book, allowing you to integrate contact information in CRM and Microsoft Outlook. Contacts can link to other features within CRM, or function independently. Assign Contacts to Accounts, Tasks, Appointments in the Calendar, Opportunities, Quotes, and Contracts.

Tasks – These are reminders that operate within CRM and can be added to Microsoft Outlook. Tasks can integrate with other features in CRM, or function independently. Assign Tasks to Accounts, Contacts, Opportunities, Quotes, Contracts, and Service Orders, and to employees using the Send Document feature.

Calendar – The Calendar feature includes a 2-month calendar, a list of your open tasks, and a daily appointment schedule. Create appointments, quick-edit and delete tasks, and view the calendar by day, month, or year.

Addresses – The Addresses feature gives users easy access to all addresses that are saved in the CRM Address table. The addresses entered in the Addresses grid are available for selection from any field in CRM that requires an address (assuming the field is not restricted to specific addresses based on your CRM system settings). You can also link CRM addresses to VISUAL addresses if you link an account to a VISUAL customer. The Addresses feature is also a good data source to perform a mail merge.

History- Using the History feature you can view all History notes in the CRM database. History notes can be a record of a call or electronic document which is created automatically by CRM, or a reminder you create and attach to an account or contact.

Mail

The Mail module on the navigation bar includes five features that you can use to access your mail from Microsoft Outlook.

Access your **Inbox**, **Outbox**, **Drafts**, **Sent Items** and **Deleted Items** from within the Mail module in CRM.

See your Microsoft Outlook user’s documentation for more information on mail options and procedures.

If you use Outlook 2016, you will receive this message when a connection is made to the Microsoft Exchange service: “The operation system is not presently configured to run this application.” After you click **OK**, the connection to the Exchange service is made, and e-mail within CRM functions as expected. Generally, the connection is made after you start or restart CRM and access e-mail. The connection to the Exchange service is retained as long as CRM is running. If the message is displayed in an event other than its initial connection, click **OK** and processing continues.

Sales

The Sales module on the navigation bar includes nine features that allow you to create sales plans, specify sales quotas, access pipeline charts based on quotas, create and maintain quotes and quote line items, opportunities, estimates, competitors and orders, and view shipments for CRM customers.

CRM is designed to give you flexibility in the way you organize and process your sales records. You can use the multiple sales features in CRM to customize your sales process. You do not have to utilize all of the CRM sales features to successfully maintain CRM records. For example, your business may not need to track sales plans on opportunities, or you may decide not to use one of the sales features.

Most of the features in Sales are integrated with each other and other applicable features within CRM, and VISUAL. A brief description of each feature in Sales is listed below.

Sales Plans – Create and maintain sales plans in the Sales Plans feature. Apply sales plans to opportunities to track the progress of a potential sale. The Pipeline Charts feature also uses sales plans to graphically compare quotas and opportunities.

Quotas – Create quotas for sales reps, territories, business units, divisions, branches, or all and apply quotas based on the sales stages you created in Sales plans for each month in a specified year. Use the quota information to graphically compare quotas and opportunities using the pipeline chart.

Opportunities – An Opportunity is a record for a potential sale. Use the Opportunities feature to create and maintain opportunities. A graphical representation of all opportunities that contain a sales plan can be viewed in the Pipeline Charts feature in CRM.

Pipeline Charts – The pipeline chart is a graphical comparison of accumulated opportunity and quota amounts.

View pipeline charts by sale rep, territory, business unit, division, branch, or all. Each pipeline chart can be broken down into year, and quarter or month, and sales stages.

Quotes – These price estimates for goods or services. Use the Quotes window to create and maintain quotes and line items, and convert a quote to an order in CRM.

Estimates – Create and maintain estimates in the Estimates feature. You can access CRM estimates in VISUAL so that costing information and quantity break functionality can be applied to each CRM estimate.

Orders – An order is a commitment from a customer to purchase goods or services. Use the Orders window to view orders in CRM, or maintain orders in VISUAL.

Shipments – The Shipments feature includes all CRM customer orders that contain goods that have been shipped.

Competitors – Create and maintain competitor records using the Competitors feature. Use the Competitors feature to view competitor information and plan strategies for winning future sales.

Help Desk

The Help Desk module on the navigation bar includes two different interfaces where you can create and maintain calls and issues using either the Standard Interface or the Unified Interface.

All of the features in the Help Desk are integrated with each other and other applicable features within CRM. This list provides a brief description of each feature in the Help Desk.

Unified Interface

Calls – A call is a record of an issue and a resolution. The Calls feature in a unified interface contains both the calls and issue feature in one record. Only one issue is allowed per call. You can create and maintain calls and issues as well as flag calls for follow-up.

Standard Interface

Calls – A call is the record of an issue and resolution. Use the Calls feature to create and maintain customer calls, add or delete issues on calls, and flag calls for follow-up. Add issues to calls in this feature that are complex and/or require billing.

Issues – An issue is the record of the subject of a call and its resolution. Use the Issues feature to view and edit subject, resolution and billing information for each call. You can also delete issues from this grid. To create an issue, see “Adding Issues,” on page 8–8.

Field Service

The Field Service module on the navigation bar includes five features where you can create and maintain contract types, contracts and service orders for accounts, and access the Scheduling and Purchase Orders windows from VISUAL. A brief description of each feature in Field Service is listed below.

Contract Types – Create and maintain contract types using the Contract Types feature. Contract types are templates that can be applied to new contracts to automatically populate contract fields, reducing time and entry errors.

Contracts – A contract is a binding agreement to service and/or maintain products customers purchase from the manufacturer. The Contracts feature records service, warranty, and maintenance for an account using the **Items** option bar button in the Contracts grid. You can view all contracts entered in the system, all active contracts, only the contracts you enter, or the contracts you specified that have been flagged for follow-up.

Contract Items – The Contract Items feature you can use to view, sort and filter all existing contract items. You cannot create contract line items from this grid, but you can edit and delete existing contract line items.

Service Orders – A Service Order records information about a service engagement or action for an account, and includes line items that list operation, material, expense, vendor, and labor detail. The Service Orders feature on the navigation bar allows you to create and maintain service orders, generate invoices, and flag service orders for follow-up. You can view all service orders entered in the system, released service orders, closed service orders, or view service orders you specified that have been flagged for follow-up.

Invoice – The Invoice feature lets you post billed calls, contracts, and service orders to accounts receivable.

Scheduler – The Scheduler feature opens the Scheduling window in VISUAL. The Scheduling window allows you to view the shop schedule relative to firmed and released work orders.

Purchase Orders – The Purchase Orders feature opens the Purchase Order Entry window in VISUAL. Use Purchase Order Entry to create and maintain purchase orders for both inventory and non-inventory parts, as well as for subcontracted services.

Marketing

The Marketing module contains the Catalog feature. Use this feature to create a library of company literature. You can catalog both electronic and printed literature, and organize and classify catalog items according to user-definable categories and types.

Catalog – Use the Catalog feature to create tasks for employees to mail printed material to specified contacts or accounts, or e-mail electronic documents to contacts.

Events – The Events feature is used to track company events, such as seminars, tradeshows and webinars. You can also track those who participate in or attend the events.

Application Builder

Use the Application Builder module to view features you created using the Application Builder feature. You can access your feature and create and edit customizable records using the App Builder module.

The detail window for each record you create in your custom feature of the Application Builder module contains two tabs that include user-defined information and associated CRM files. You can apply relationships between your application and other CRM records, allowing you to access your record from the option bars of associated records, or from application detail records, depending on the type of relationship you specified in the Application Builder feature.

Admin

The Admin module on the navigation bar includes seven features where you can create and maintain employees, reports, and user defined fields, assign users and set security, import text files and records from VISUAL, and maintain defaults in CRM. A brief description of each feature in Admin is listed below.

Defaults – The defaults window provides defaults for fields found in the details windows of features such as Accounts, Help Desk, Contracts, Service Orders, and Employees, where you can assign system settings such as entering a default URL address or document for CRM Today, assigning a maximum record retrieval limit, and a reminder interval.

Employees – Create and maintain employees in the Employee feature.

Security – The user and user type features allow the system administrator to create and maintain users within CRM, and assign access to CRM features for each employee. The administrator can control user access to CRM modules, features, tabs within feature records, specific actions such as editing, adding and deleting, and specific functions such as creating an invoice or service order. The system administrator can create user types for groups, such as sales and marketing, and assign the same settings to each user in the group.

Reports – Create and maintain report templates using the Reports feature. You can create multiple reports for one grid or window using Seagate Crystal Reports 8.0 or higher. Reports are accessible from the main menu under the **Reports** menu option.

Application Builder – Create your own features within CRM and assign relationships to other CRM records. View and add records to the feature(s) you created in the Application Builder module on the navigation bar. Use the User Defined Fields to specify your information for each record.

User Defined Fields – Use this feature to create and maintain user defined fields for all features in CRM that contain a User tab, and for all applications created in the Application Builder. User defined fields can contain integers, text, decimal, date, boolean fields and a drop-down list.

Navbar and Plug-Ins – Customize your CRM Navigation Bar using the Navigation Bar feature. You can add custom executables as modules, features, or sub-features to your Navigation Bar. You can also move, edit, copy, and delete both standard CRM navigation bar items and custom executables.

Utilities – The Utilities feature contains these functions:

- **Text File Import** – The Text File Import feature allows you to import text files into CRM and apply them to a specified feature in CRM.
- **Back Office Import** – The Back Office Import feature contains an Import utility that imports VISUAL records into CRM. This features should be used during setup. A link is created between the two programs so you can alter record information in either VISUAL or CRM.
- **Field Service Utility** – Use the Field Service Utilities, such as Verify and Fix Structure and Recalculate Amounts, to verify that service order records exist in the VISUAL work order structure, and to calculate and roll up estimated and actual amounts from the Service Order Details screens into the Service Order Header.

Back Office

The Back Office module allows you to access VISUAL and Financials windows. Use the Back Office module to assist in customer inquiry and to view additional information when creating opportunities, quotes, contracts, and service orders. The following features are available in the Back Office module. Refer to your Infor VISUAL or *Infor VISUAL Financials User's Guide* for more information on each feature.

Parts – This is a list of all parts in inventory. The Parts listed on the Parts grid exist in your VISUAL database.

RMAs – RMAs allows you to view and edit return material authorizations for orders placed in VISUAL. A Return Material Authorization (RMA) is a document that controls the return of some part or parts previously sold and shipped to a customer.

Receivables – This is a list of all receivables in your VISUAL database.

Purchase Orders – This option displays purchase orders that have been generated for all customers.

Sales – This option you can use to view, maintain, or print records that involve Sales such as customer orders, sales commissions, shipping, billing entry, and printing customer, shipping, commission and revenue reports.

Inventory – Links to VISUAL. Use the Inventory features to edit Inventory Transactions, Parts, Units of Measure, Inter-Branch Transfers, and Part Trace Profiles. You can also view the Material Planning, Warehouse Maintenance, and Part Trace Maintenance windows.

Purchasing – Links to VISUAL. Use the Purchasing functions to view Purchase Orders, Purchase Receipts, RFQs, Outside Services, and Vendors.

Scheduling – Links to VISUAL. Use the Scheduling functions to maintain the Concurrent Scheduler, and to view the Scheduling and Throughput windows.

Eng/Mfg – Links to VISUAL. Use the Engineering and Manufacturing functions to view estimates, labor tickets, outside services, shop resources, and the manufacturing window.

Ledger – The Ledger feature allows you to access VISUAL windows that create, maintain, and/or print VISUAL records associated with the Ledger.

Payables – Use the Payables feature to create and maintain payables in your VISUAL Financials database.

Cash – Use the Cash feature to access VISUAL Financials Cash menu options. You can organize your actual cash flow, view accounting transactions, and specify and maintain account information for bank accounts using the windows in the Cash feature.

Quality – Access VISUAL Quality from the Quality feature without leaving CRM.

Chapter 2: Implementing CRM

This chapter includes:

Topic

Implementing CRM

CRM is a sophisticated, comprehensive software system that helps you effectively manage your customer relations and follow-up. Your unique business practices demand that CRM be adaptable to diverse business environments.

Because there are many ways to set up your database, you should invest the time in identifying the day to day operational intricacies and needs of your company before you install CRM. You do not want to set up CRM in a way that is unsuited to the character of your business.

Your Infor Global Solutions Partner can help you set up an implementation plan to assure that you get the maximum return from CRM.

Implementation Overview

This section covers the steps necessary to implement the CRM system after your software installation is complete. By following the steps in this section, you can establish a solid foundation of data and begin building your system.

This section is only an overview of the necessary steps to implement CRM. Refer to the appropriate chapter in this manual for a complete description of each of the tools and functions discussed here.

Import from VISUAL

Use the Import from VISUAL feature to import existing VISUAL records into CRM. This utility should be run during setup. A link is created between the CRM and VISUAL database tables, allowing you to maintain record(s) from either software program.

The Data Import Utility imports accounts with existing customers, contacts with existing alternate contacts, addresses with existing shipping addresses, and employees with employees.

For more information on the Import utility, see “Back Office Import” on page 13–47.

Caution: Before you import employee records from VISUAL, you must specify a Resource ID. The Resource ID is found in **Admin > Defaults** on the Employee tab. Click the browse button to select a Resource ID from the list. Define Resource IDs in VISUAL. You must include a Resource ID in all employee records before you can successfully import them into CRM.

Users and Security

To allow personnel to access CRM, you must create users. Create CRM users in VISUAL Manufacturing. After you create users, set up security profiles for them in CRM. Sign in to CRM as the SYSADM users, then select **Admin > Security** to set up permissions within CRM.

The SYSADM user can allow other users access to specific modules, features, and feature tabs within CRM, restrict users from performing certain actions within grids or windows, and restrict users from performing specific functions available from the main menu and within specific grids and records. For example, the system administrator can allow users access to the Admin module, but disallow users access to the Security feature under the Admin category button. Within each item or feature, the system administrator can regulate what functions a user can perform, such as adding, editing, and deleting information, and which tabs are available within a record from specified grids or windows. The Security feature can also restrict users from performing functions such as generating a service order or invoice, or converting an account to a customer. See “Using the Security Feature” on page 13-22.

Defining System Tools

You must define certain CRM system tools in order to create and maintain complete records. System tools are found in the main menu under **Tools** and **Tools > Maintain**. System tools contain lists, fields, and system functions that appear throughout CRM. Not all system tools are required to implement CRM, only the three listed below are necessary to operate CRM effectively. However, you should complete all of the system tools that your business uses so your records are complete. For a more detailed explanation of each feature within system tools, refer to “Common Features” on page 4–1.

Sales Reps - You must specify sales representatives to apply commission or ownership to accounts, as well as maintain pipeline charts for sales representatives. On the main menu, select **Tools > Maintain > Sales Reps**. The sales reps you define are used in both CRM and VISUAL.

Document Types - Document types make up your company material. These documents must be entered in order to maintain the Catalog grid, and to send tasks to employees. On the main menu, select **Tools > Maintain > Document Types**.

Configurator - If you use the MPC in CRM, you must specify the location of the MPC in the MPC Database Location field in order for the MPC software to operate in CRM. On the main menu, select **Tools > Sales Options**, then click the **Configurator** tab.

Note: The Master Product Configurator (MPC) database is single-byte. If you use Infor VISUAL 8.0.0 with CRM, double-byte characters used in VISUAL may not be displayed or stored properly in the MPC database. For best results, use characters in the Latin 1 character set for configured parts.

Work Order Text File Directory - If you want to create work orders, you must specify a location for the work order text file in the Work Order Text File Directory field. On the main menu, select **Tools > Sales Options**, then click the **Configurator** tab.

VISUAL Manufacturing Executable Directory - To access the Back Office module, the location of the VISUAL executable is required. On the main menu, select **Tools > Options**, then click the **Settings** tab.

VISUAL Quality Executable Directory - To access features within the Back Office module, the location of the VISUAL Quality executable is required. On the main menu, select **Tools > Options**, then click the **Settings** tab.

Mail Merge - In order to perform mail merges using the Mail Merge Wizard in CRM, you must specify the location of the Mail Merge templates in the Document Directory field. On the main menu, select **Tools > Options**, then click the **Merge** tab.

You must also specify a location where your temporary merged documents can be saved in the Temp Directory field on the **Merge** tab.

Dialer - If you use the Dialer function in CRM, TAPI (Telephony Applications Programming Interface) device should be entered in the Device to Use for Dialer drop-down list. On the main menu, select **Tools > Options**, then click the **Dialer** tab.

Sales Plans

If your business uses sales plans, it is necessary to create Sales Plans before you create opportunities with sales plans and view pipeline charts. Sales Plans are detailed steps that sales reps can follow to track the progress of a potential sale. Sales Plans are also used in Pipeline Charts to graphically compare quotas and opportunities.

For more information on creating Sales Plans, refer to Chapter 7, “Using the Sales Plans Feature”.

Help Desk

Use CRM to implement the Help Desk component as a Unified Interface or a Standard Interface. Each interface offers benefits based on the ways in which you use your Help Desk component. If you choose to use a unified interface, you must do this prior to working in the Help Desk component. Choosing a unified interface after you have been working in the Help Desk component could result in a loss of Help Desk data. See “Defining the Standard Help Desk Interface” on page 8–2. See “About the Help Desk (Unified Interface)” on page 9–2.

Register CRM

Use the CRM Registration window to specify a different registration number to gain access to different modules within CRM.

1. Select **Help > Register** from the main menu.
2. Enter your company name in the Company Name field.
3. Enter your Serial Number in the Serial Number field provided.
4. Click **Register** to register, or click **Cancel** to exit the VISUAL CRM Registration window without registering.

Maintaining General Maintenance

For complete records and optimal performance, general record maintenance must be entered. General maintenance consists of fields that allow you to specify additional record information that is often customizable. General maintenance allows you to identify and sort records by type, set records at a priority level for follow-up, set service codes and service times for issues on calls, create and maintain document types for sending documents, assign working locations for employees, create and maintain sales reps, as well as identify other user defined fields within records.

All maintenance utilities are mentioned in this section except for user defined fields which are maintained through the User Defined Fields feature in the Admin module on the navigation bar. Maintenance in this section is displayed on the main menu under the **Tools** option, and applies to most of the features in CRM. Maintenance fields include **General Codes**, **Sales Reps**, **Document Types**, **Service Areas**, **Keywords**, and **Labor Rate Groups**.

Maintaining General Codes

General codes include user-defined list options available for selection in the details window of certain features like accounts, tasks, opportunities, quotes, service orders, and contracts.

Select **Tools > Maintain > General Codes** from the main menu.

The General Code Maintenance window includes user-defined options that help define records you create and maintain in CRM.

Adding a General Code

1 Click the drop-down list in the Maintain Codes For field to select a field from the list.

These fields are system defined and most frequently appear as a drop down list field in the details window of a selected record.

Refer to the following fields available in the Maintain Codes For list for information on the field and its location in CRM.

After you select a field, the options for that field appear in the table below.

Account Type – The account type allows you to categorize your accounts with user-defined types, such as customer, or prospect. This field is located on the Account details window.

Annual Sales – Specify codes to indicate a company’s annual sales.

Branch/Business Unit/Division – These fields allow you to categorize your accounts by location. These fields are located on the General tab of the Account window, the General tab of the Opportunity window, and the Quote tab in the Quote window.

These classifications can be used to sort and filter your records in a grid, create customized reports, and can be used by the synchronization rule set when CRM records are synchronized with VISUAL and/or VISUAL Financials.

Call Billing Rate – Specify the Billing Rate ID, a description of the billing rate, and the hourly rate up to two decimal places to charge for calls.

Country – Specify the country codes and descriptions that you want to use for address details. This field is located on the Account tab of the Account window, the Address tab of the Contact window, the General tab of the Addresses window, and the Account tab of the Competitors window.

Note: When you select a country code, the country description is displayed in the Country field.

Event Stage – Specify codes to indicate the planning stages of events.

Expense – The types of expenses incurred (air travel, meals, rental cars, lodging, etc.) by service technicians for performing a service. These options are available in the Line Items for Service Order pane on the **Expense** tab. You can specify a Rate Per value, Markup Percentage, and Fixed Charge for each Expense ID in General Codes Maintenance. When you select the Expense ID on the Expense tab in Service Orders, the system inserts the values associated with the Expense ID on the tab. The system inserts the value you specify for Rate Per is inserted in the Unit Price column, the value you specify for Markup Percentage in the Markup % column, and the value you specify for Fixed Charge in the Markup $ column.

History Type – Specify the history record codes and descriptions you want to use to categorize history entries.

Lead Source – Specify the lead sources, or the ways in which the customer came to know about your company, such as yellow pages, ad, or referral. The Lead Source field is displayed in the Opportunity window on the General tab.

Opportunity Reason – General reasons why the opportunity was won or lost. The Opportunity Reason field is found in the Opportunity window on the Results tab.

Opportunity Type – Categorizes your opportunities by type, such as old or new prospect. The Opportunity Type field is found in the Opportunity window on the General tab.

Position – Specify the position codes and descriptions that you want to use to describe the job titles of contacts. This field is displayed on the General tab of the Contact window.

Preferred Contact – The preferred method of contacting your customers, such as email, cell phone or fax. This field is displayed in the Profile tab of a contact record.

Priority – Indicates the importance of the record or call, such as high, medium, or low. The Priority fields appear in the General tab of the Service Order window, and the Issue tab in the Call Issue window. The Priority field in the Task tab on the Task window is system-defined and does not reflect the options available in the General Code Maintenance window.

Probability – Categorizes probability codes.

Quote Type – Categorizes your quotes by type, such as large or small. The Quote Type is found in the Quote window on the Quote tab.

SIC Codes – These codes are used to classify companies according to the products they produce. SIC Codes appear in the Profile tab of the Account detail window.

Service Code – A code for categorizing service. For example, onsite, offsite, after hours, and business hours. This field is displayed on the General tab of the Service Order window.

Service Type – Indicates the type of service rendered. For example, install, repair, and contract. The Service Type field is displayed on the General tab of the Service Order window, and the Line Items for Contract pane.

State/Province – Allows you to Partner a state or province with a record.

Task Activity Type – This code is available only if you use Infor VISUAL 8.0.0 or higher. Indicates how the activity is conducted. Examples of task activity types are e-mail, phone, or meeting. The Type field is displayed on the Task tab in the Task window. Task activity types you define in CRM are also available for use in Activity Entry in Infor VISUAL.

Task Category – Indicates the type of task. For example, administration, management, marketing, and development. The Category field is displayed on the Task tab in the Task window. Task categories you define in CRM are also available for use in Activity Entry in Infor VISUAL.

When you select the Task Category option, you can also select these check boxes:

> **New on Complete** – To generate a new task after tasks with this category are completed, select this check box.
>
> **Record history** – To retain a history of the task in the History grid, select this check boxes.

User Salesrep - Allows you to associate an user with a sales rep. Once such an association is created the user can display all of the transactions for the sales reps with which it is associated. You can populate the User ID and Sales Rep ID fields by either entering or browsing for the information. To match more than one Sales Rep ID with a User ID create a line for each pairing. Linking one User ID to multiple Sales Rep IDs allows each user a greater level of transparency to view associated transactions for all of its assigned Sales Rep IDs.

2. To specify an option in the field list, click the next available cell under the **ID** column.

   If there are no cells available, click the **Insert** button in the last row header.

3. Enter the ID of the option you want to include in the list. This is the description that is displayed in the options list.

4. Press the **Tab** key, or click the cell under the **Description** column, and specify a description for the option.

5. Repeat steps 2 through 4 to add additional field options.

6. Click **OK** to save your changes and exit the General Code Maintenance window, or **Apply** to save your changes without exiting the General Code Maintenance window.

   Click **Cancel** to exit the General Code Maintenance window without saving changes.

Editing General Codes

1. With the appropriate information entered in the Maintain Codes For field, click in the cell you want to edit in the table below and specify the necessary information.

2. When you are finished editing, click **OK** to save your changes and exit the General Code Maintenance window, or **Apply** to save your changes without exiting the General Code Maintenance window.

   Click **Cancel** to exit the General Code Maintenance window without saving changes,

Deleting/Undeleting General Codes

1 With the appropriate information entered in the Maintain Codes For field, select the options you want to delete in the table.

2 Right-click your mouse and select **Delete Record** from the menu.

The options appear in gray with a line through the text. This indicates that the records have been deleted and are no longer active.

3 To permanently delete the options, click **Apply**.

4 To undelete the deleted options, select the options you want to undelete and right-click your mouse.

5 Select **Undelete Record** from the menu and the records are active.

6 Click **OK** to save your changes and exit the General Code Maintenance window.

Click **Cancel** to exit the General Code Maintenance window without saving changes.

Or click **Apply** to save your changes without exiting the General Code Maintenance window.

Maintaining Sales Reps

Create and maintain sales reps in the Sales Rep Maintenance window. You can assign an Employee ID, a payment method and a default commission percentage for each sales rep. To assign a sales rep to a record, the sales rep must be entered in this maintenance window. CRM and VISUAL share the sales rep table in the database. The sales reps you specify in CRM are available for use in VISUAL, and the sales reps you specify in VISUAL are available for use in CRM.

You can assign sales reps as the owner of new accounts, opportunities, and quotes records by selecting the **Assign new Accounts, Opportunities, and Quotes to Logged In Sales Rep** check box or by selecting the **Assign Ownership by Sales Rep** check box.

1 Select **Tools > Maintain > Sales Reps** from the main menu.

2 To specify a sales rep, click the next available cell under the **Sales Rep ID** column, or click the **Insert** button to create a blank row. Press the **Tab** key or click the next cell to move from column to column.

3 Enter the following information in the columns where appropriate.

Sales Rep ID – Specify a unique Sales Rep ID. This text is displayed in most of the drop down lists when selecting a sales rep.

Name – Specify the name of the sales rep.

Employee ID – If the sales rep is an employee, click the **Employee ID** button (click the column to activate the **Employee ID** button) to select the sales rep from the employee list.

Pay Method – Select the payment method used for each sales rep by clicking on the **Pay Method** button. Choose from Accounts Payable (A), or Payroll (P).

Def Commission % – Specify a default sales commission percentage that this sales rep will draw from the total price of the record if the sale is won.

The Default Commission % is automatically used to populate the Quote header and quote line items for new quotes when you choose a sales rep if you select the **Initialize Commission from Sales Rep** check box in the Defaults feature.

4 To edit sales reps, click in the cell you want to edit and either specify the information, or click the browse button to change the selection.

5 To delete sales reps, select the sales rep(s) you want to delete, then right-click your mouse and select **Delete Record**.

The sales rep is displayed in gray with a line through the text.

6 To undelete sales reps, select the sales rep(s) you want to undelete (you can undelete a record as long as it hasn't been saved) and select **Undelete Record**.

7 Click **OK** to save your changes, deletions or additions and exit the Sales Rep Maintenance window.

Click **Apply** to save your changes, deletions or additions without exiting the Sales Rep Maintenance window.

Click **Cancel** to exit the Sales Rep Maintenance window without saving changes, deletions, or additions.

Maintaining Document Types

Create and maintain document types in the Document Category Maintenance window. Use this window to specify types of literature for the Catalog feature and categories that further classify your types of literature. Document Types must be entered to create complete records of your company material in the Catalog feature.

Adding Categories and Document Types

1 Select **Tools > Maintain > Document Types**.

2 Enter a unique category name in the Category field. The category describes the group of materials you want to include in the Catalog feature, such as a product name, then press the **Enter** key.

3 In the dialog, click **Yes** to create a new Category.

4 Enter a brief description of the Category in the Description field.

5 Click the first cell under the **Type Name** column (or click the Insert button to add a new row) and specify a unique type of company material within the category. This is the text that is displayed in the drop down list for Types.

For example, if CRM was the Category, then CRM Brochure would be a Type.

6 Click the next cell under the **Description** column and specify a brief description of the Type.

7 Repeat steps 5 and 6 to add additional Types to the Category.

8. Click **OK** to save your information and exit the Document Category Maintenance window.

   Click **Apply** to save your information and remain in the Document Category Maintenance window.

   Click **Cancel** to exit the Document Category Maintenance window without saving changes.

Editing Document Types

You cannot edit Categories, but you can edit the description of the category, and the types within each Category. To change the name of a Category, you must delete the Category, then reenter the correct Category name.

1. Click the **Category** button beside the Category field to select the Category description you want to edit, or the Category that contains the Type(s) you want to edit.

   The Category, its description, and all the Types associated with the Category appear in the window.

2. Edit the necessary information in the Category description, or Type fields.

3. Click **OK** to save your information and exit the Document Category Maintenance window.

   Click **Apply** to save your information and remain in the Document Category Maintenance window.

   Click **Cancel** to exit the Document Category Maintenance window without saving changes.

Deleting Categories

1. Click the **Category** button beside the Category field to select the Category you want to delete.

2. Click the **Delete Category** button.

   A dialog is displayed warning that all Types associated with the Category will be deleted along with the Category.

3. Click **Yes** to continue, or **No** to stop the deletion.

Deleting Types

1. Click the **Category** button beside the Category field to select the Category that contains the Type(s) you want to delete.

2. Click the row header of the Type(s) you want to delete, the right-click your mouse and select **Delete Record** from the menu.

3. To permanently delete Types, click **Apply**.

4. To undelete Types (assuming you have not saved the Types), select the row(s) you want to undelete.

5. Right-click your mouse and select **Undelete Record** from the menu.

6 Click **Apply** to permanently save your changes and remain in the Document Category Maintenance window.

Click **OK** to save your changes and exit the Document Category Maintenance window.

Click **Cancel** to exit the Document Category Maintenance window without saving your changes.

Maintaining Service Areas

Service areas are your service locations. Sub Areas are assigned to larger geographic locations called Areas to help you categorize your service locations. Both the Area and Sub Area fields appear on the General tab of the Employee window, and the Details tab of the Address window.

Select **Tools > Maintain > Service Areas** from the main menu.

Refer to the following to add or edit Service Areas and Sub Areas.

Adding Areas

1 Type a user-defined area in the Area field of the Area Maintenance window.

2 Press the **Enter** key on your keyboard.

3 In the Define Area dialog, click **Yes** to add the area, or **No** to return to the Area Maintenance window without saving the area.

4 If you clicked **Yes**, click the Description field and specify a description for the area.

5 Click **Apply** to save the area and begin adding sub-areas to the area.

Click **OK** to save the area and exit the Area Maintenance window without adding sub areas to the area.

Click **Cancel** or the **Enter** key to exit the Area Maintenance window without saving the area.

Adding Sub Areas

1 If necessary, click the **Area** button beside the Area field and select the appropriate area.

After the Area is selected, all of the sub areas or service areas for the area appear in the Sub Area table.

2 To specify a service area in the field list, click the next available cell under the **Sub Area Name** column.

If there are no cells available, click the asterisk button in the last row header.

3 Enter the name of the sub area.

The information you specify in this column is displayed in the options list.

4 Press the **Tab** key, or click the cell in the same row under the **Description** column, and specify a description for the service area.

5 Repeat steps 2 through 5 to add additional service areas.

6 Click **OK** to save your changes and exit the Area Maintenance window.

Click **Cancel** to exit the Area Maintenance window without saving changes.

Click **Apply** to save your changes without exiting the Area Maintenance window.

Editing Sub Areas

1 Click the **Area** button in the Area Maintenance window and select the appropriate Area.

2 Click in the cell you want to edit in the Sub Area table and specify the necessary information.

3 Click **OK** to save your changes and exit the Area Maintenance window.

4 Click **Cancel** to exit the Area Maintenance window without saving changes.

Click **Apply** to save your changes without exiting the Area Maintenance window.

Deleting and Undeleting Sub Areas in Areas

1 With the appropriate Area selected in the Area Maintenance window, select the sub areas you want to delete in the table by clicking the row headers.

2 Right-click your mouse and select **Delete Record** from the menu.

The sub areas appear in gray with a line through the text. This indicates that the records have been deleted and are no longer active.

3 To permanently delete the sub areas, click **Apply**.

4 To undelete the deleted sub area(s), select the sub area(s) you want to undelete.

5 Right-click your mouse and select **Undelete Record** from the menu.

6 Click **Apply** to save your changes and remain in the Area Maintenance window.

Click **OK** to save your changes and exit the Area Maintenance window.

Click **Cancel** to exit the Area Maintenance window without saving your changes.

Deleting Areas

Click the **Area** button beside the Area field and select the Area you want to delete.

Click the **Delete Area** button beside the Area field.

Note: If you delete the Area, all sub areas within the Area are deleted as well.

Maintaining Keywords

Specify keywords for issues on a call in the Call Issue pane. Use keywords to sort like issues together, or to view user-defined information about the issue in the Issues grid.

Select **Tools > Maintain > Keywords** from the main menu.

Refer to the following to add or delete Keywords, and add, edit, or delete Categories in Keywords.

Adding Keywords

1 Type a user-defined keyword in the Keyword field, then press the **Enter** key on your keyboard.

2 In the Define Keyword dialog, click **Yes** to add the new keyword.

3 Click the Description field and specify a description for the keyword in the space provided.

4 Click **Apply** to save the keyword and begin adding categories to the keyword.

Click **OK** to save the keyword and exit the Keyword Maintenance window without adding categories to the keyword.

Click **Cancel** or the **Enter** key to exit the Keyword Maintenance window without saving the keyword.

Adding Categories to Keywords

1 If necessary, click the **Keyword** button beside the Keyword field to specify the keyword.

When a keyword is selected, the categories for the keyword, if any, appear in the table.

2 Click the first available cell underneath the **Category Name** column.

If there is no available or blank cell, click the asterisk sign on the **Row Header** button to create another row.

3 Specify a unique name of the category you want to apply to the keyword.

Another row is automatically added when you specify information in this cell.

4 Press the **Tab** key on your keyboard, or click the appropriate cell under the **Description** column and specify the description for the category.

5 Repeat steps 2 and 3 to add additional categories to the selected keyword.

6 Click **Apply** to save the category and remain in the Keyword Maintenance window.

Click **OK** to save the category and exit the Keyword Maintenance window.

Click **Cancel** to exit the Keyword Maintenance window without saving your changes.

Editing Categories in Keywords

1. If necessary, click the **Keyword** button and select the keyword that includes the category you want to change.

   The categories for the selected keyword appear in the table.

2. Click the cell you want to edit and specify the appropriate information.
3. Click **Apply** to save your changes and remain in the Keyword Maintenance window.

   Click **OK** to save your changes and exit the Keyword Maintenance window.

   Click **Cancel** to exit the Keyword Maintenance window without saving your changes.

Deleting and Undeleting Categories in Keywords

1. If necessary, click the **Keyword** button, and select the keyword that includes the category you want to delete.
2. Click the **Row Header** button(s) beside the categories you want to delete.
3. Right-click your mouse and select **Delete Record** from the menu.
4. To permanently delete categories, click **Apply**.
5. To undelete categories (as long as the categories have not been saved), select the row(s) you want to undelete.
6. Right-click your mouse and select **Undelete Record** from the menu.
7. Click **Apply** to permanently save your changes and remain in the Keyword Maintenance window.

   Click **OK** to save your changes and exit the Keyword Maintenance window.

   Click **Cancel** to exit the Keyword Maintenance window without saving your changes.

Deleting Keywords

1. Click the **Keyword** button, and select the keyword you want to delete.

   Note: When you delete a keyword, all categories associated with the keyword are deleted.

2. Click the **Delete Keyword** button.
3. In the Delete Keyword dialog, click **Yes** to delete the selected keyword, or **No** to cancel the deletion.

   The Keyword and all categories associated with the keyword are deleted from the CRM database.

   To save your changes and exit the Keyword Maintenance window, click **OK**.

   To exit the Keyword Maintenance window without saving your changes, click **Cancel**.

Maintaining Labor Rate Groups

The Labor Rate Groups menu option is not fully functional. You can create labor rates in the following procedures, and add these labor rates to contracts in the contract detail window, but labor rates do not yet populate related service orders.

Create and maintain Labor Rate Groups in the Labor Rate Group Maintenance window. Labor Rate Groups allow you to create common labor rates for work performed for specific customers.

For example, you may always charge government entities the same labor rate no matter what technician performed the service. Future functionality will allow labor rates to override the rate assigned to each technician in the Employees grid when a labor rate is assigned to a service order.

You can assign more than one resource (the type of work performed) to a Labor Rate Group. Assign a resource, effective date, the dollar amount rate, the percentage amount rate, and the labor rate charge to each Labor Group entered in the Labor Rate Group Maintenance window.

Select **Tools > Maintain > Labor Rate Groups** from the main menu.

Refer to the following to add, edit and delete Labor Rate Groups and Resources within Labor Rate Groups.

Adding Labor Rate Groups

1 Click in the Labor Group field and specify a unique Labor Rate Group name.

2 In the Define Labor Group dialog, click **Yes** to add a labor group. To return to the Labor Rate Group Maintenance window without adding the Labor Group, click **No**.

3 If you clicked **Yes**, click in the Description field and specify a description for the Labor Group.

4 Click **Apply** to save the Labor Group and remain in the Labor Rate Group Maintenance window.

Click **OK** to save the Labor Rate Group and exit the Labor Rate Group Maintenance window.

Click **Cancel** to exit the Labor Rate Group window without saving the Labor Group.

Adding Resources to Labor Groups

1 If necessary, click the **Labor Group** button to select the Labor Group to which you want to add Resources.

2 Click in the first blank cell under the **Resource** column.

3 Click the **Resource** button to select a Resource (the service performed by the technician) from the list. The resource must be unique from other resources in this labor group. The system displays only those resources not marked obsolete in Shop Resource Maintenance in VISUAL.

4 Press the **Tab** key or click in the next cell under the **Effective Date** column to specify the date this resource rate becomes effective. The effective date must be unique from other effective dates entered for this labor group.

5 Press the **Tab** key or click the next cell under the **Rate** column to specify the rate the technicians are paid per hour for this recourse.

6 Press the **Tab** key or click the next cell under the **Percent** column to specify the percent the technicians are paid per hour for this resource.

7 Press the **Tab** key or click the next cell under the **Bill Rate** column to specify the rate the technicians bill the customer per hour for the service performed.

8 To specify additional resources for the Labor Group, repeat steps 2 through 7.

9 Click **Apply** to save the Resource and remain in the Labor Rate Group Maintenance window.

Click **OK** to save the Resource and exit the Labor Rate Group Maintenance window.

Click **Cancel** to exit the Resource window without saving the Labor Group.

Editing Resources in Labor Groups

1 Click the **Labor Rate** button beside the Labor Group field to select the Labor Group that contains the Resources you want to edit.

When the Labor Group is selected, the Labor Group Description and Resources associated with the Labor Group appear below.

2 To edit a resource, click the cell that you want to edit and specify the necessary information. This may require selecting an **Resource** button.

3 Click **Apply** to save the Resource and remain in the Labor Rate Group Maintenance window.

Click **OK** to save the Resource and exit the Labor Rate Group Maintenance window.

Click **Cancel** to exit the Resource window without saving the Labor Group.

Deleting a Labor Group

1 Click the **Labor Group** button beside the Labor Group field to select the Labor Group you want to delete.

When the Labor Group is selected, the Labor Group Description and Resources associated with the Labor Group appear below.

2 Click the **Delete Labor Group** button to delete the labor group and all the associated resources.

3 In the Delete labor group dialog, click **Yes** to delete the labor group and all its associated resources, or **No** to cancel the deletion.

Deleting/Undeleting Resources in Labor Groups

1 Click the **Labor Group** button beside the Labor Group field to select the Labor Group that contains the Resource you want to delete.

When a Labor Group is selected, the Labor Group description and Resources associated with the Labor Group appear below.

2 Click the row header next to the Resource you want to delete, then right-click your mouse and select Delete Record from the menu.

The resources appear in gray with a line through the text. This indicates that the records have been deleted and are no longer active.

3 To permanently delete the resource, click **Apply**.

4 To undelete the deleted resource, assuming they have not been saved, select the resource you want to undelete.

5 Right-click your mouse and select **Undelete Record** from the menu.

6 Click **Apply** to save your changes and remain in the Labor Rate Group Maintenance window.

Click **OK** to save your changes and exit the Labor Rate Group Maintenance window.

Click **Cancel** to exit the Labor Rate Group Maintenance window without saving your changes.

Chapter 3: Using the Interface

This chapter includes:

Topic

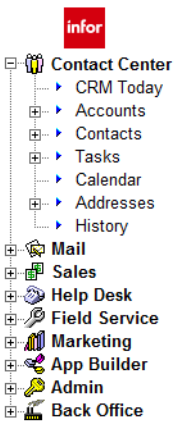
About the CRM Interface

This chapter contains information on the general principles and features in the CRM user interface.

Along with the common CRM features and definitions mentioned in this section are procedures on how to customize your CRM module to best suit your needs. One of the valuable features of CRM is the ability to customize windows, grids, and information using layout options and filters, as well as creating and defining user-defined fields.

Using the Navigation Bar

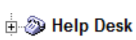
Use the navigation bar to access all of the CRM applications.



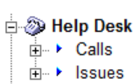
The navigation bar includes nine modules. Modules are in bold text and contain a relevant icon next to the text. Feature applications are contained within each module. When you click the **Accounts** button under the Contact Center module, the selected grid or window is displayed in the work space to the right of the navigation bar. Depending on your security setup and purchase agreement, some of the features found on the navigation bar may not be available. Features and sub-features that are accessible display in black text, and inaccessible features appear in gray. The SYSADMIN can make changes to the security of each user in the Admin module under the Security feature on the navigation bar. You can also customize your navigation bar using the Navigation Bar feature under the Admin module.

The CRM navigation bar remains active and stationary throughout CRM operation.

1 To view the contents of a module, click the Plus **+** icon beside the module, or double-click the module name.



The features associated with the selected module are displayed.



To hide the features in a module, click the Minus **–** icon beside the module, or double-click the module.

2 Some features have one or more associated applications, or sub-features. CRM identifies features that contain sub-features by adding a **+** button beside the feature. To view sub-features, click the **+** button beside the feature you want to open, or double-click the feature.

3 Click on the feature, or the arrow beside the feature, to open the grid or window for that application in the workspace to the right.

As long as the feature contains a blue arrow, the feature is accessible.

The grid or window opens in the workspace to the right of the navigation bar.

The feature you are currently viewing is identified with an orange arrow beside the feature.

Arrows beside features that are not in use are colored in blue.

Some features within a module are not accessible and are usually a category title for sub-features associated with the feature.

The Sales feature under the Back Office module is not accessible, but the sub-features it contains are accessible. Most of the features that contain green arrows are menus within VISUAL. For example, the Sales feature in the Back Office module of CRM and its associated sub-features coincide with the Sales menu items in VISUAL.

Using CRM Toolbars

Modern navigation controls and convenient dockable toolbars are featured in CRM. By repositioning these toolbars or allowing them to remain independent of the window in a “float” mode, you can tailor the appearance of a window to your preferences. Drag the toolbar to float or inhabit a position at the left, right, bottom, or top of the window.

CRM Toolbars

Some toolbar buttons are common to nearly every CRM window. They are shortcuts for options found mostly under the **File**, **Edit**, **View**, and **Actions** menus. These common buttons allow you to perform basic tasks such as creating a new item, saving, deleting, printing, refreshing, filtering, merging and flagging items. Most of these buttons are found on the four default toolbars: Main, Filter, Calendar, and Web. Refer to these four toolbars in this section for more information. For information on the Printing toolbar, refer to "Click the Close button, or select File, Close to exit the Specifications window." on page 4–21.

For instructions and further information each toolbar button, refer to the feature where the toolbar buttons appear unless otherwise noted.

Using the Main Toolbar

New Record 

– Click the **New** button to create a new record for the feature you are currently viewing. You can also select **File > New** from the main menu.

New 

– Click the down arrow beside the **New** button to create almost any type of document from most windows or grids in CRM. Click the down arrow beside the **New** button to select a new type of document from the list. Choose from **Account**, **Contact**, **Address**, **Task**, **Appointment**, **Opportunity**, **Quote**, **Call**, **Contract**, **Service Order**, **Employee**, and **Email**. You can also select **File > New** from the main menu.

Save Record(s)  – Click **Save** on the main toolbar to save changes to the current record. When you click **Save**, the CRM database is immediately updated. You can also select **File > Save** from the main menu.

Print  – Click the **Print** button to print the grid or window you are currently viewing. CRM uses a preloaded detail report that prints all viewable grid columns and records. For information on additional reports see “Using the Reports Feature” on page 13-33.. You can also select **File > Print** from the main menu for additional options on paper size, margins, orientation and printer selection.

Copy Record  – The Copy Record toolbar button is available in almost every CRM grid and detail window. All record information from a selected record is copied, a unique ID is assigned, and “Copy of [the description]” is entered in the Description field. The copied record is added to the appropriate grid, then automatically opens the copied record in the detail window for editing.

Delete Record(s) – Click the **Delete** button to delete the document you are currently viewing, or have selected. By default, when you delete an active record, you are prompted to verify the deletion. If you continue, a line is drawn through the record, and the color of the text is changed to gray, indicating that the record has been deleted. You can also select **Edit > Delete Record(s)** from the main menu.

Note: You can undelete a record using the same button as long as you have not saved your deletion. After you save a deleted record, the deletion is permanent and is no longer accessible.

Undelete Record(s) – Click the **Undelete** button to change a deleted record to an active record. The **Undelete** button functions only on a deleted record, and only if you have NOT saved that deleted record. By default, you are prompted to verify the change. If you choose to undelete the record, the line through the text is removed, and the gray color is changed to black, indicating the record is now active. You can also select **Edit > Undelete Record(s)** from the main menu.

Go To First Record – Click the **Go To First Record** button to view the first record in the list. The first record is determined by the selected sort order. The first record is displayed at the top of the list in the grid.

Go To Previous Record – Click the **Go To Previous Record** button to view the record immediately preceding the current record on the associated grid. Grid order is determined by the sort order.

Go To Next Record – Click the **Go To Next Record** button to view the record immediately following the current record on the associated grid. The next record is determined based on the sort order for the current record type.

Go To Last Record – Click the **Go To Last Record** button to view the last record in the current list. The last record is determined by the selected sort order. The last record is displayed at the bottom of the list in grid view.

Refresh – Click the **Refresh** button to update information you are currently viewing. You can also select **View > Refresh** from the main menu.

View/Edit Specifications – Click the **View/Edit Specifications** button to specify or view specifications for a selected account, contact, task, appointment, opportunity, quote, call, issue, contract, and service order. See "Maintaining Specifications" on page 4–21.

Flag Record for Follow-up – Click the **Flag Record for Follow-up** button to follow-up on a selected record. When you click the **Flag Record for Follow-up** button, a Flag for Follow-up window appears, allowing you to add duties and due dates to the follow-up. When you flag a record, a red flag is displayed beside the record in the grid. When the follow-up is complete, a gray flag is displayed beside the record in the grid. You can also select **Actions > Flag for Follow-up** from the main menu.

Compose E-mail – Click the **Compose E-mail** button to send an e-mail message to a selected contact. When you click the **Compose E-mail** button, Microsoft Outlook opens an e-mail addressed to the selected contact. The **Compose E-mail** toolbar button is accessible from the Contacts Grids.

Send Letter – Click the down arrow beside the **Send Letter** button to select a template to apply to the selected contact. When you select a template, Word opens with the contact information merged into the template you selected. Refer to "Maintaining Merge Setup" on page 4–5. The **Send Letter** toolbar button is accessible from the Contacts Grids.

Send Document – The Send Document toolbar button is used in conjunction with the Catalog feature in the Marketing module. You can creates a task for an employee to mail a selected document located in the Catalog feature to one or more contacts, or you can e-mail an electronic version of the document located in the Catalog feature to one or more contacts.

Merge Document Wizard – The Merge Document Wizard collects CRM record information you specify and applies the data to a merge template, such as a letter, to mail to customers, associates, etc. See "Using Mail Merge" on page 4–8.

Additional buttons that are displayed on the Main toolbar for unique grids are described below.

Import VE Users – Click the **Import VE Users** toolbar button to import existing VISUAL user information into CRM. When users are imported into CRM, information in each record synchronizes with VISUAL. The **Import VE Users** toolbar button is accessible in the Security feature.

Using the Filter Toolbar

Use the Filter toolbar buttons to easily sort and filter records in grids. For procedural information for each filter button, refer to "Using Filters in Grids" on page 3–25.

Find – Use the **Find** button to locate a record or records that match the criteria you provide. When you click the **Find** button, a Find dialog is displayed. Specify the information of the record you want to locate, and the first record in the list that matches your criteria is automatically highlighted. You can click the **Find Next** button to locate the next record in the list that matches the criteria you provided.

Select a View View: All Accounts – Click the down arrow beside the View field to select a view to apply to the grid you are currently viewing. You can save views you create in the main menu under **View > Save View**. See “Using the View Feature” on page 3-28.

Advanced Filter – Use the **Advanced Filter** button to add up to three different conditions to a search on a grid. The Advanced filter contains numerous statements that can also be combined with a sort. See “Using Advanced Filtering” on page 3-28.

Show Speed Bar – Use this toolbar button to specify information pertaining to one or more records for a selected column in the open grid. See “Using Filters in Grids” on page 3-25.

Filter on Selection – Click the **Filter** button to automatically filter the grid using the information in the cell you select. For example, if you click a cell that contains a red flag, and select the **Filter** button, only the records in the active grid that have been flagged for follow-up are listed. See “Customizing Columns” on page 3-31.

Toggle Filter – The **Toggle Filter** button becomes active when you use the Filter on Selection function in a grid. Click the **Toggle Filter** button to return to the previous view. See “Customizing Columns” on page 3-31.

Sort in Ascending Order – Click the **Sort in Ascending Order** button to sort the selected column in alphanumeric order. Alphanumeric order sorts from A to Z or from lowest number to highest number. You can also click the column header of the column you want to sort.

Sort in Descending Order – Click the **Sort in Descending Order** button to sort the selected column in reverse alphanumeric or descending order. Descending order sorts from Z to A or from the highest number to the lowest number. You can also double-click the column header of the column you want to sort.

Advanced Sort – Click this button to open an advanced sort dialog for the current record. Specify up to three different sort criteria for the current grid. See “Using the Advanced Sort Button” on page 3-31.

Using the Calendar Toolbar

The Calendar toolbar automatically is displayed when you access the Calendar feature in CRM.

Day View – Click the **Day View** toolbar button to open two panes: the Appointments pane and the Calendar and Task pane. Maintain appointments and view and complete tasks from this view.

Month View – Click the toolbar button to view appointments a month at a time.

Year View – Click this toolbar button to view appointments a year at a time in one window.

Using the Web Toolbar

The Web toolbar automatically is displayed when you open CRM Today.

Back – Use the **Back** button to return to the previous page. This feature can be used within CRM as well as the internet.

Note: The **Back** and **Forward** buttons are disabled by default. To enable these buttons, see "Maintaining Defaults" on page 13–3.

Forward – Use the **Forward** button to return to the next page. This feature can be used within CRM as well as the internet.

Stop – Use the **Stop** button to stop loading the current page in CRM.

Home – Click the **Home** button to return to the default home page. Specify a default home page in the navigation bar in **Admin > Defaults**. The CRM default homepage is CRM Today.

Refresh – Click the **Refresh** button to update the information on the current page.

Address Bar Address: www.infor.com – Specify the web address or network location for the page you want to view. If you are using a web address, you do not need to include the "http://" in the address.

Go Go – Click the **Go** button after you have entered an address or network location in the Address Bar to begin loading the selected page.

Tool Tips in Toolbars

All buttons on toolbars feature Tool Tips. Tool Tips are mini pop-up windows that tell you the function of the particular button to which you're pointing. Scroll over the button using your mouse to view tool tips.

Arranging Docked Toolbars

You can arrange toolbars so they reside on any of the four sides of a CRM application or float independently atop the window. By default, toolbars are positioned or docked at the top of the window. By placing your mouse pointer over the toolbar handles you can drag the toolbar anywhere on the window. As you move the toolbar, the toolbar outline automatically moves to the closest dockable position. This is when you can release the handles and dock the toolbar in the window. Dockable toolbars include the main menu toolbar, main toolbar, filter toolbar, web toolbar, calendar toolbar, and navigation toolbar.

Using the Main Menu

The main menu options are alternatives to the toolbar, and include features that are not available on the toolbar or in the work space.

File Menu

The File menu includes general options for records in CRM.

Sign In – Opens the CRM Sign In window. This allows you sign onto CRM as a different user without shutting down the application or database engine.

New – Creates a new record. When you select the **New** menu option, a new record of the feature you are currently viewing appears. If you want to select a different record type, click the down arrow beside New and a list appears: **Account**, **Contact**, **Address, Task**, **Appointment**, **Opportunity**, **Quote**, **Call**, **Contract**, **Service Order**, **Employee**, and **Email**.

Save – Saves the current record. You can either select **File > Save**, click the **Save** toolbar button, or press the **Ctrl** + **S** keys on your keyboard.

Export – The Export function allows you to export all information in a selected grid into an HTML file, a file separated by commas, or tabs.

If you want to export the complete grid, clear the **Export Selected Grid Rows Only** check box.

Print – Prints the preloaded detail report associated with the current record, grid, or window. You can select **File > Print**, click the **Print** toolbar button on the Main toolbar, or press the **Ctrl** + **P** keys on your keyboard.

Printer Setup – Use this to set up default print options for the current CRM session. The next time you start CRM, your system defaults are used.

Exit – Closes the current CRM session. If you have unsaved records, you are prompted to save them.

Edit Menu

The Edit menu includes options that apply to the current CRM record. The options include:

Copy (Record) – Copies the entire record currently open or selected. The only data not duplicated is the Record ID.

Delete Record(s) – Removes a record from the CRM database. If you select a deleted record, this menu option is displayed as **Undelete Record**.

Find – Searches the database for records meeting the search criteria for the Find dialog. The Find option applies to the current record type. You can select **Edit > Find**, click the **Find** toolbar button on the main toolbar, or press the **Ctrl** + **F** keys on your keyboard.

Find Next – Uses the same search criteria as the Find dialog but looks for the next matching record in the list. You can also press the **F3** key.

View Menu

The View menu allows you to define the appearance of the grids within CRM. The View menu also includes filtering options. The options include:

Columns – Sets up views based on column layout for the current grid. The Columns menu option contains additional options: **Customize Column Layout**, **Save Column Layout**, **Restore Saved Layout**, and **Restore Default Layout**.

My Views – Allows you to create and maintain your views within the open grid, as well as select default views.

View Manager – Allows the system administrator to view, create, maintain, and assign views to any CRM user, as well as assign default views.

Advanced Filter – Opens the Advanced Filter window allowing you to filter up to three conditions and include advanced sorting. This option functions in the same manner as the **Advanced Filter** button on the Filter toolbar.

Advanced Sort – Calls up the Advanced Sort dialog, allowing you to configure up to three levels of sort options. This option functions in the same manner as the **Specify Sort Order** button on the Filter toolbar.

Refresh – Updates the information in the current grid. You can either select **View > Refresh**, click the **Refresh** button on the Main toolbar, or press the **F5** key on your keyboard.

Tools Menu

The Tool menu includes information about the general tools available in CRM. The options include:

Maintain – Includes general maintenance options that apply throughout CRM. When you place your mouse over the **Maintain** menu option, additional options appear: **General Codes**, **Sales Reps**, **Document Types**, **Service Areas**, **Keywords**, **Labor Rate Groups**, and **Split Commissions** which is reserved for future use.

Options – Opens the User Options dialog. The options apply throughout CRM. See "Maintaining Options" on page 3–40.

Sales Options – Assigns system defaults relating to the Sales module such as automatically creating tasks when a sales plan is complete, assigning ownership of accounts, opportunities, and quotes to a logged in sales rep, open specific VISUAL windows, and define the location of the MPC Configurator.

Connection Monitor – The Connections Pool Monitor allows you to view all of the SQL statements for debugging purposes, and to connect to three different platforms. You can either select **Tools > Connection Monitor** on the main toolbar, or press the **Ctrl** + **F9** keys on your keyboard.

Reset Navigation Bar – This option restores the default settings for the navigation bar.

Rewrite Default Grid Layouts – This option rewrites all grid layouts. This may be necessary when upgrading to a new version of CRM, or if problems occur when viewing a grid.

Actions Menu

The Actions menu varies based on the CRM function you have open. In general, the Actions menu includes **Flag for Follow up**, **Mail Merge**, **Dial**, and **New Contact Wizard** options.

Flag for Follow-up – Creates a reminder for an account, contact, opportunity, quote, call, contract and service order, and identifies each record by placing a flag in the grid. This is a default column, however you have the option to hide it, if necessary.

Dial – Automatically dials the number associated with the record via modem.

Mail Merge – Combines selected CRM record data and incorporates data into a data source, such as a letter, to easily create company material in bulk for mailing.

Merge Setup – The Merge Setup function allows you to create and maintain Mail Merge templates used for merging selected CRM records using Microsoft Word.

Quick Task – Allows you to quickly create a task for the selected item. The Quick Task dialog does not contain all the information you would specify using the standard Task feature, but allows you to specify basic information without leaving your current window.

Quick History – Allows you to quickly create a history for the selected CRM item. The Quick History dialog does not contain all the information you would specify using the standard History feature, but allows you to specify basic information without leaving your current window.

Send Email – The **Send Email** option allows you to send an e-mail message to a selected contact. When you select the **Send Email** option, Microsoft Outlook opens an e-mail addressed to the selected contact. You can either select **Actions > Send Email** on the main toolbar, or press the **Ctrl + E** keys on your keyboard.

Multiple Attach – Attaches a record to selected records in most CRM grids. When you attach an item or record to one or more selected CRM records, you are creating a relationship between two CRM records. The records are associated by using the option bar.

You can use the Multiple Attach function with the following types of records: Accounts, Addresses, Appointments, Calls, Contracts, Estimates, Opportunities, Orders, Parts, Quotes, Service Orders, Tasks, and any application you create in the Application Builder that has a M to M relationship assigned to it.

Using the Multiple Attach function allows you to collect a group of like records and assign them to a task, or opportunity, or contact, etc.

For example, if you create an application using the Application Builder and name the application Marketing Campaign, then accessed the Accounts grid and filtered all accounts by the state of Texas. You can apply the Multiple Attach function on all the accounts that are located in Texas so your telemarketers can work from the list of accounts without needing to attach each account to the Marketing Campaign feature.

New Contact Wizard – Assists in creating a new contact using a step by step process. The New Contact Wizard can create a contact, a contact for an existing account, and a contact for a new account. The New Contact Wizard allows you to complete most fields for a contact, and minimal fields for accounts.

The following menu options are available on specific grids.

Sync Contact(s) to Outlook – Available from the Contacts grid. Adds the selected contact(s) to Microsoft Outlook. See “Adding Contacts to Outlook ” on page 5-33.

Sync Task(s) to Outlook – Available from the Tasks grid. Adds the selected task(s) to Microsoft Outlook. See “Adding Contacts to Outlook ” on page 5-33.

Convert Quote to Order – Available from the Quotes grid. Converts the quote to an order and adds the order to VISUAL. The new order is also visible in the Orders grid in CRM.

Convert Quote to Estimate – Available from the Estimates grid. Converts the quote to an estimate in CRM and adds the quote to VISUAL. Converting a quote to an estimate allows you to add costing information and quantity break functionality using the Estimating window in VISUAL.

Convert Account to Customer – Select this option to convert the selected account in CRM to a customer in VISUAL. Once this conversion is complete, it cannot be reversed.

Generate Service Orders – Available in the Contracts grid. Generates a service order in the Service Orders grid from the selected contract in the Contracts grid.

Quick Task – The **Quick Task** option allows you to create a task and add a reminder from most grids by entering only basic information. To specify additional information, open the task in the Task window. You can either select **Actions > Quick Task** on the main toolbar, or press the **Ctrl** + **T** keys on your keyboard.

Quick History – The **Quick History** option allows you to create a history record from most grids by entering only basic information. To specify additional information, open the item in the History window. You can either select **Actions > Quick History** on the main toolbar, or press the **Ctrl** + **H** keys on your keyboard.

Reports Menu

The Reports menu contains reports applicable to the grid you have open. Default reports are supplied for most grids, and you have the option to create custom detail reports using Crystal 8 or higher software. See “Using the Reports Feature” on page 13-33.

Help Menu

The CRM help menu includes options related to the CRM Help file, and the CRM application.

Visual CRM Help – Opens the CRM help file. You can access CRM help by pressing the **F1** key on your keyboard.

Online Books – Opens a PDF of the *Infor VISUAL CRM User’s Guide*.

About – Contains general information about the application, including build date and version number.

Register – The Register feature allows you to specify your registration number and your company name. Different registration numbers can activate or deactivate specified modules in CRM.

Using CRM Help Files

CRM includes an extensive online help system. CRM Help uses a “tri-pane” window with the Contents, Index, and Search items in the left pane of the window, and the viewable information in the right pane.

To access the online help system, select **Help > VISUAL CRM Help**, or press the **F1** key.

You can search for individual help topics using the Index or Search tabs in the left pane of Help.

Using the About CRM Box

To view CRM module and copyright information, select **Help > About** from the main menu.

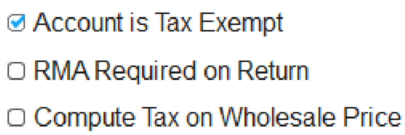
To exit the About VISUAL CRM dialog, click **OK**.

Using CRM Buttons, Boxes, and Fields

There are a number of buttons and boxes throughout the CRM system. It is important to know how these buttons and boxes function.

Using Check Boxes

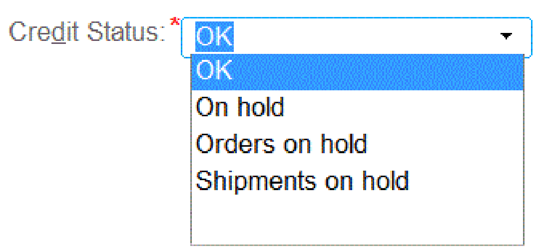
Check boxes are small square boxes that you can click to activate various options. You can select more than one check box within a section.



Using Drop Down Boxes

Drop down boxes allow you to select one of several options from a drop down menu. To select an option from a drop down box:

1 Click the drop-down button in the drop down box.



2 Click the option you want to select.

Using the Toggle Button

The **Toggle** button allows you to view the details of a selected record, or exit the details of a record and return to the previous window or grid. The first **Toggle** button is visible in the top left corner of the window, grid, or pane when the records listed contain further information. The second **Toggle** button is displayed in the same location when you are in the details of a selected record, and acts as an exit button to return to the previous grid or window.

For example, if you specify the Accounts grid, a **Toggle** button is displayed at the top of the grid. To view details of a record, select the record, then click the **Toggle** button. The details window of the selected account is displayed in place of the Accounts grid. To return to the Accounts grid, click the **Toggle** button located in the top left corner of the window.

Using Browse Buttons

Use the browse buttons or or to select an item from a list. Browse buttons are especially helpful when lists are large and too long for drop down menus. The browse window, also referred to as the lookup window, allows most of the same find and filter features available in CRM grids.Click on the browse button.

This example uses the Account Contacts browse window.

The browse window offers multiple lookup options including the filter, advanced filter, and find features.

3 To find a record, refer to one of the following lookup options.

Filter Entry- The filter fields located above the column headers allow you to find records that apply to specific information you specify for the selected column.

For example, if you want to find a contact but only remember the first name of the contact, click or tab to the filter field that is located directly above the First Name column. Type the first name of the contact, then click the column header or the **Filter on Selection** button . CRM finds all contact records that contain the first name you entered.

Sort in Ascending/Descending Order – You can sort records by columns in ascending or descending order by clicking the column header of the information you want to sort, or by clicking the column header and then click the **Sort Ascending** or **Sort Descending** toolbar button.

For example, if you want to find the last name of a contact, but are unsure of the spelling, click the Last Name column header. The records are sorted in descending order according to the last names of the contacts. If you click the Last Name column header again, the records are sorted in ascending order according to the last name of the contacts.

Find – Use the Find function to find specific information for one or more records in a specific column. Refer to "Using Filters in Grids" on page 3–25. The find feature in the browse window does not allow you to replace information.

Advanced Filter – The Advanced Filter option allows you to specify conditional statements to find the records that meet your requirements. Refer to "Using Advanced Filtering" on page 3–28.

4 Click **OK** to automatically populate the field with the selection, or **Cancel** to exit the browse window without selecting an item from the list.

Viewing Terms Information

When you click the Browse button to select a Terms ID, the system displays the available terms and information about the terms in a table. Define Terms IDs in VISUAL Manufacturing in the Terms Maintenance dialog available in Application Global Maintenance. If you use VISUAL Financials Global Edition, define Terms IDs in Terms Rule Maintenance. You cannot create, delete, or modify terms in CRM.

To select a Terms ID for the record, select a row. If you select a Terms ID with installments, the system displays the installment information in the Installment section and installment table. Click **Ok** to apply your selection to the record.

Using the View Detail Button

The **View Detail** button opens details of the field associated with the button. For example, in the Contact window under the General tab there is a “Reports to” field. Fill in the field to activate the View Detail button. Click the **View Detail** button to view the details. In the Contact window, the details of the chosen “reports to” record opens in the bottom pane.

Using the Calendar Button

When a field requires the entry of a date, you can use the Calendar button to select the date.

1 Click the calendar button.

2 Click the right or left arrows at the top of the month to move forward or backward a month.

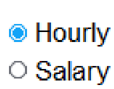
3 When you find the date you want to enter, click the date.

To specify today’s date, place your cursor in the date field or click the Calendar button, and then press **T** on your keyboard.

Using Radio Buttons

Radio buttons are small round buttons that you can click to select various options. You can only select ONE radio button at a time. Clicking on another radio button automatically deselects the one you originally selected. Radio buttons are used when only one selection is required. This contrasts with check boxes, where you can select a number of options at one time.

The **Type** section of the dialog consists of radio buttons.



Using Accordion Buttons

An accordion button collapses or expands a panel section when clicked. The user closes and opens a section by clicking on the accordion button in the section title. Use the accordion to have only relevant sections open at the same time to save on screen space.

Collapsed Accordion - When the accordion button points down the information under the panel section title is hidden. Click once to expand the fields below the section.

Expanded Accordion - When the accordion button points up the information under the panel section title is viewable. Click once to collapse the fields below the section.

Required Fields

Before a record can be saved in CRM, certain fields must have a value. These fields are marked with red asterisks. Before you save a record, make sure that all fields marked with a red asterisk contain information. If you leave a field marked with a red asterisk blank, the system prevents you from saving the record.

CRM Tables

Use CRM tables to insert, delete, and edit rows of information, most often used for options on a type of record (such as an opportunity, or an account), or for a selected record.

CRM tables do not function the same as grids, and do not have the ability to sort, filter, operate in double panes, or customize. CRM tables are found throughout the system, mostly in the details of records, and windows that create user-defined fields or records. To view a table in the Accounts feature, select the account you want to view from the Accounts grid, then click the **Toggle** button located at the top left of the grid. Click the **Sales Rep** tab.

Using CRM Tables

You can use tables in CRM when details of a record may require more than one entry, or when creating fields. Tables allow you to view multiple records in one workspace, and add and delete rows.

Table Components

The following terminology is used when referring to Table features:

Column – Vertical areas that represent one type of data for all rows.

Row – Horizontal areas that represent one record of data in the table.

Column Header – The gray box at the top of each column that contains the column title. In most CRM applications, when the column title is enclosed in brackets (< >), a **Browse** button is displayed in the cells of each column when you click in the cell.

Row Header – The gray box at the left of each row. The row header is used to select the row, and indicates the selected or active row with a black arrow.

Column Title – The name of the column appearing in the column header.

Cell – The data entry area where a row and column meet. Cells may be editable, or read-only.

Selecting Table Rows

In some cases, you may want to select one or more rows in a table to perform various functions.

Select rows in the following ways:

Single Select – To select a single row, click on the row header (gray box to the left of the row).

Multiple Contiguous Select – To select multiple rows that are in a continuous (unbroken) sequence, place the pointer on the row header for the first row and press and hold the **Shift** key. Then click the last row header you want included in your selection. The first, last, and all rows in between become selected.

Multiple Discontinuous Select – In some instances, you may need to select multiple rows that are not in sequence. To do this, click on the row header of the first row you want to select. Then press and hold the **Ctrl** key on your keyboard. Click on each remaining row header while holding down the **Ctrl** key. Each row becomes selected individually. When you have selected the last row, release the **Ctrl** key.

Deselecting one Row – To deselect a row, hold down the **Ctrl** key and click on the row header for the selected row. It becomes deselected.

You can use all of these actions in sequence. For example, you can use the multiple contiguous select method to select a large group of rows, and then the deselect function to remove unwanted rows.

Navigating in Tables

To move from one record to the next, press the up or down arrows on your keyboard.

To move from one column to the next, press the right and left arrow keys on your keyboard, or click your mouse in the appropriate cell. You can also use the **Tab** key to move from right to left within the columns, and the **Shift** + **Tab** keys to move from left to right within the columns.

Moving and Resizing Table Columns and Rows

To move a table column, click and hold the column header you want to move. Drag the column to the place you want the column to appear. When you drag a column, your cursor turns to two opposite arrows and an outline of the column moves with your arrow cursor. Release the mouse button where you want the column to appear.

To change the width of a table column, place the pointer on the separator between the two column headings. The cursor changes to a double-arrow with a vertical line. Hold down the left mouse button and drag horizontally. Drag to the left or right to change the width of the column.

To change the height of the rows in a table, place your cursor between the **Row Header** buttons. Your cursor will change to an up and down arrow with a line through the middle. When you see this symbol, click your mouse and drag your cursor to the appropriate column height. Release your mouse when you have reached the column height you want. The table rows reflect the height change you made.

Modifying Cells in a Table

You can edit information in cells that contain a white background. Cells that contain a gray background cannot be edited.

To change cell information, click the cell and edit the data. Some cells require that you make a selection from a Browse button. Click the **Browse** button to make a selection from the list.

Inserting Table Rows

The next available row is automatically provided for you, but you can manually add a row by clicking on the **Insert** button located to the left of the last row in the table.

CRM Grids

Grids sort CRM records and are usually found in the main working area when you open each feature using the navigation bar. For example, to view the Accounts grid, click the **+** button beside the Contact Center module in the navigation bar, then click the **Accounts** button.

Use CRM grids to view, filter, sort, delete, and edit (applicable text) records. You can also visit links, where applicable, from the grid. Grids are customizable, allowing you to save views, specify visible columns, and grid layout. You can also print or preview a list of all records within the grid.

Most Grids have the ability to use the Option bar to view information associated with selected records. Additional information is displayed in a bottom pane, allowing you to view the selected record in the top pane. For example, to view the associated calls for an account, select the account in the grid, then click the **Calls** option button.

Grid Components

The following terminology is used when referring to Grid features:

Column – Vertical areas that represent one type of data for all rows.

Row – Horizontal areas that represent one record of data in the table.

Column Header – The gray box at the top of each column that contains the column title. In most CRM applications, when the column title is enclosed in brackets (< >), a **Browse** button is displayed in the cells of each column when activated.

Row Header – The gray box at the left of each row. The row header is used to select the row, and indicates the selected or active row with a black arrow.

Column Title – The name of the column appearing in the column header.

Cell – The data entry area where a row and column meet. Cells may be editable, read-only, or contain links.

Selecting Grid Rows

In some cases, you may need to select one or more rows in a grid to perform various functions.

Select rows in the following ways:

Single Select – To select a single row, click on the row header (gray box to the left of the row).

Multiple Contiguous Select – To select multiple rows that are in a continuous (unbroken) sequence, place the pointer on the row header for the first row and press and hold the **Shift** key. Then click the last row header you want included in your selection. The first, last, and all rows in between become selected.

Multiple Discontinuous Select – In some instances, you may need to select multiple rows that are not in sequence. To do this, click on the row header of the first row you want to select. Then press and hold the **Ctrl** key on your keyboard. Click on each remaining row header while holding down the **Ctrl** key. Each row becomes selected individually. When you have selected the last row, release the **Ctrl** key.

Deselecting one Row – To deselect a row, hold down the Ctrl key and click on the row header for the selected row. It becomes deselected.

You can use all of these actions in sequence. For example, you can use the multiple contiguous select method to select a large group of rows, and then the deselect function to remove unwanted rows.

Double-Clicking on a Row – Double-clicking a row on any grid in CRM will open the details window for that record. You can also click the **Toggle** button in the top left corner of the grid to perform the same action.

Some grids include links within each cell. Be sure you click on a cell that does not contain a link, otherwise the pane for the link is displayed instead of the details for the selected record.

Navigating in Grids

To move from one record to the next, press the up or down arrows on your keyboard. You can also click the right and left arrows in the main toolbar.

To move from one column to the next, press the right and left arrow keys on your keyboard, or click your mouse in the appropriate cell. You can also use the **Tab** key to move from left to right within the columns, and the **Shift** + **Tab** keys to move from right to left within the columns.

Scrolling in Grids

Click the up or down arrows, or click and hold the scroll bar button while moving the button up or down to view the list.

Use the scroll bar to scroll through the columns. You may be able to resize columns so more can be viewed.

Moving and Resizing Grid Columns

To move a grid column, click and hold the column header you want to move. Drag the column to the place you want the column to appear. When you drag a column, your cursor turns to two opposite arrows and an outline of the column moves with your arrow cursor. Release the mouse button where you want the column to appear.

To change the width of a grid column, place the pointer on the separator between the two column headings. The cursor changes to a double-arrow with a vertical line. Hold down the left mouse button and drag horizontally. Drag to the left or right to change the width of the column.

You can save changes to the column width by selecting **View > Columns > Save Column Layout**. Changes to the columns remain in the system until you change and save the column widths again.

Saving and Restoring Grid Column Layouts

You can save changes to grid columns, restore column layouts to a previously saved version, or restore to the default column layout.

Any changes you make to the location or size of each column on a grid can be saved by selecting **View > Columns > Save Column Layout** from the main menu. When you save column layouts, the columns you move or resize reflect the columns in all the views associated with the grid.

Column changes are not permanent until you save the column layout from the main menu. If you made changes to the columns, but prefer the previously saved column layout, you can restore the saved layout by selecting **View > Columns > Restore Saved Layout** from the main menu.

To restore to the CRM default column layout, select **View > Columns > Restore Default Layout** from the main menu. After you restore to the default layout, any column layouts you saved are no longer accessible. All columns in the views associated with the grid reflect the change as well.

Modifying Cells in a Grid

You can edit information in cells that contain black colored text, however you cannot edit cells that contain blue text. Depending on the grid, blue text may indicate a link, or view-only data. To edit links, you must specify the detail window of the record by clicking the **Toggle** button, then edit the appropriate field.

To change cell information, click the cell and edit the data. Some cells require that you make a selection from a drop down list. When you click the cell, a down arrow or a browse button is displayed. Click the down arrow or browse button to make a selection from the list.

Changing the Appearance of Grids

You can add or remove horizontal lines, vertical lines, and alternating background row colors. The Options dialog contains other information such as enabling extended error reporting, notifying users when records are deleted, or when the grid has reached a record limit, and the location of the directory where your executables are installed. For more information on the Advanced and VE tabs, see "Maintaining Options" on page 3–40.

1 Select **Tools > Options** from the main menu.

2 Select any of the following check box options in the **Grid Settings** section.

Show Horizontal Lines – Select this check box to view the grid with horizontal lines. This setting changes the view of all grids within CRM.

Show Vertical Lines – Select this check box to view the grid with vertical lines. This setting changes the view of all grids within CRM.

Alternating Row Background Colors – Select this check box to view the grid with alternating colors for each row. Light gray and white are used for alternating colors. This setting changes the view of all grids within CRM.

Always Display Speed Search Bar (Search Grid) – The Speed Search Bar is displayed in every CRM grid, by default. Remove the check from the Always Display Speed Search Bar (Search Grid) check box if you want to hide the Speed Search Bar in every CRM. Refer to "Using Filters in Grids" on page 3–25.

Max Selected Rows – Specify the maximum number of rows a user can select in a grid. If you leave this field blank, the system defaults to allowing 99 rows to be selected.

3 Select the **Show Explorer Graphic** check box if you want the CRM graphic (located at the top of the navigation bar) visible. Remove the check mark in this check box if you do not want the CRM graphic visible in the navigation bar.

4 Select the **Show Full Day Strip** check box to view the day strip (located to the left of the appointment time table in the Calendar window). Remove the check mark in this check box if you do not want the day strip visible in the Calendar window.

5 Click **OK** to save your changes, or **Cancel** to exit the User Options window without saving changes.

For information on the remaining tabs, see "Maintaining Options" on page 3–40.

Using Filters in Grids

Multiple grids that can contain hundreds of records are maintained in CRM. Because these grids can be large, a Filter toolbar is included in CRM that allows you to quickly sort and filter to find the records you need, as well as significantly reducing system load time.

Using the Advanced Filter toolbar button you can also save multiple layouts so you don’t have to manually change your views each time you choose to view a different layout. For more information on saving views, refer to "Maintaining Views in Grids" on page 3–33.

By default, the Filter toolbar remains active in all grids while operating CRM.

Exporting Grid Contents

The Export feature allows you to copy selected grids or records within grids and save them in a specified format.

1 Open the grid you want to export.

2 If you want to export specific records within the grid, select the records you want to export.

3 Select **File > Export** from the main menu.

4 Click the **Export File Type** drop-down list to select the type of format you want to export. Choose from: **HTML**, **tab separated values**, **comma separated values**.

5 Enter the location where you want to export your file, or click the **Browse** button to locate the path, then specify file name.

6 If you want to export the entire grid, clear the **Export Selected Grid Row(s) Only** check box.

   To export the entire grid, leave this check box unchecked.

7 Select the **Add Totals Row** check box to add a totals row. The totals row adds each row in a column that contains an amount and places the sum of all file amounts in the appropriate column of the totals row.

8 Select the **Preview** check box if you want to preview the grid before exporting the grid.

9 Click **Export** to either export the grid, or preview the grid.

   Click **Close** to exit the Export Grid Contents window without exporting records.

   If you chose to export the grid without previewing, a dialog is displayed after the grid has been exported.

   Click **OK** to return to CRM.

10 If you chose to preview the grid, the grid is opened in a separate window. When the window opens, the grid is exported to the specified path.

   When you are finished with the preview window, click the **x** button located in the top right corner of the screen.

11 Click **Close** to return to the grid.

Using the Find Button

Use the **Find** button to find records that match the criteria you select or enter, and find and replace select information you want to change for one or more records.

1 You can find like records, or you can find records based on the criteria you type or select. To find records based on the criteria you enter, skip to step 2.

   To find like records, click anywhere on the grid that matches the criteria you want to find. For example, to find accounts located in Hampton, NH, click on a cell that contains Hampton, NH. Continue with Step 2.

2 Click the **Find** button, or select **Edit > Find** from the main menu.

   All records within the current grid that match the information you specify in the Find What field and the In field are found.

If you selected a specific cell before clicking the **Find** button, the information from the cell you selected in the Find What field and the In field is automatically entered.

If you clicked **Find** without selecting a specific cell, the Find field information contains options from the first cell (top, far left) in the grid you are viewing.

3 To specify your own criteria, you can begin entering information in the Find What field first, or in the In field. The order in which you specify this information can reduce time and error. Refer to the following fields for more information.

Find What – Specify the information you want to find in the Find What field.

In – Click the **In** drop-down list to select the column where the information can be found.

Certain columns are restricted to a number of valid entries, such as the **Follow-up** column. The valid entries in this column are **Normal**, **Completed**, or **Flagged**. If you wanted to find all records that have a follow-up status of **Flagged**, it is easier to specify the column in the **In** drop-down list first, then select the entry in the **Find What** drop-down list. However, if you wanted to sort the **First Name** column, you would not be able to select from a drop-down list in the Find What field because the number of valid entries is infinite and the drop-down list would be too long. So the Find What field can be entered first since you will need to type this information anyway.

4 Click **More** to include additional search options.

Additional search options appear in the Find and Replace dialog.

5 Review this information to include additional search options to your search.

Search Direction – Click this drop-down list to select the direction records are searched for. Choose from **Forward** or **Backward**.

Match Case – To activate this check box, clear the **Use Wildcards** check box. Select this check box if you want your entry to be case-sensitive. For example, if you entered new hampshire, (in lower case) all records that contain New Hampshire (in upper case) are ignored. If you want all matches recognized regardless of case, leave this box unchecked.

Find Whole Words Only – To activate this check box, clear the **Use Wildcards** check box. Select this check box if you only want whole word matches found. For example, if you entered DE100 for the **ID** column, all records that contained any additional characters such as DE1003382 would be ignored.

Use Wildcards – Select this check box if you want to use wildcard entries, such as the asterisk, in your search. Wildcard entries allow you to find files while entering partial search information. For example, if you specify South* in the **State** column, all files that begin with South, such as South Dakota or South Carolina are found.

6 Click **Find Next** to find the next matching record.

The first record that matches the information you entered is found and highlighted.

7 To find records that contain specific information and replace that information with new information, click the **Replace** tab.

Note: The Replace tab is not available when the Find function accessed from a browse button on a detail window.

8 To find like records, click anywhere on the grid that matches the criteria you want to find, then click the Find toolbar button. For example, to find accounts located in Hampton, NH, click on a cell that contains Hampton, NH. Continue with Step 9.

9 To specify your own criteria, you can begin entering information in the Find What field first, or in the In field. The order in which you specify this information can reduce time and error. Refer to the following fields for more information.

Find What – Specify the information you want to find in the Find What field.

In – Click the **In** drop-down list to select the column where the information can be found.

Certain columns are restricted to a number of valid entries, such as the **Follow-up** column. The valid entries in this column are **Normal**, **Completed**, or **Flagged**. If you wanted to find all records that have a follow-up status of **Flagged**, it is easier to specify the column in the **In** drop-down list first, then select the entry in the **Find What** drop-down list. However, if you wanted to sort the **First Name** column, you would not be able to select from a drop-down list in the Find What field because the number of valid entries is infinite and the drop-down list would be too long. So the Find What field can be entered first since you will need to type this information anyway.

10 Enter the information that will replace the entry you made in the Find What field in the Replace With field.

The **Replace** and **Replace All** buttons become active.

11 Click **Replace** to find the first record that matches your criteria and replace that information with the entry you made in the Replace field.

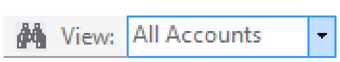
12 To find and replace all the records that match your criteria in the grid, click **Replace All**.

13 To exit the Find window, click **Cancel**, or click the **x** button located in the top right corner of the window.

Using the View Feature

Use the View feature to apply saved views to the current grid. Views must be created and saved in the My Views or View Manager features before they appear in the View drop down list.

Click the drop-down list beside the View field to select a view from the list.



By default, an All view is saved that automatically is displayed when you open the grid, however you can assign a different default if you want using the My Views or View Manger feature. The All view lists all records entered in the system for the type of grid you are viewing.

Using Advanced Filtering

Use Advanced Filtering to limit the records that appear in the grid.

Setting Up Advanced Filters

To set up advanced filters:

1 From the View menu, select the **Advanced Filter** option.

If you have previously entered a filter criteria, it is displayed in the dialog.

SQL Statements for Advanced Filtering are used in CRM. If you want to view the actual SQL Statement, select the Show SQL check box. If you are familiar with the CRM database and SQL, you can also specify the statement directly in the text box.

2 Click the **And/Or** column, click the drop-down arrow and select:

None – The first row of a multiple row filter populates with **<None>**.

AND – If you want to include the previous lines and the current line in the filter, select **AND**.

OR – If you want the filter to yield a result of the previous lines OR the current line, select **OR**.

3 Press the TAB key or click in the **Column** column.

4 Click the drop-down arrow and select the column you want to use in the filter.

Only the columns from the database table associated with the current window appear in the column list.

5 Press the TAB key or click in the **Operator** column.

6 Click the drop-down arrow and select the operator you want to use for this filter.

7 Press the TAB key or click in the **Criteria** column.

8 Click the ellipses button and select the criteria you want to use from the list that appears.

9 Click **Apply**.

CRM changes the contents of the current grid to reflect the filter you set up.

For example, if you set up the following filter in the Accounts grid, only customers with a last name of Adams would appear in the grid.

10 When you have finished using Advanced Filtering, click **Ok**.

Using the Speed Search Bar Button

The Speed Search Bar function allows you to find like records by entering matching information in the appropriate column or columns.

Note: The Speed Search Bar is visible throughout all CRM grids, by default. To hide the Speed Search Bar, remove the check from the **Always Display Speed Search Bar (Search Grid)** check box in the Options dialog. See "Maintaining Options" on page 3–40.

1 If required, click the **Show Speed Search Bar** toolbar button.

2 Place your cursor in the column that contains the information you want to specify (click your mouse in the column), then specify the information that matches the record(s) you want to find.

3 Press the **Tab** key after you specify your information.

The records that match the information you entered are found.

4 You can continue to refine or narrow your search by entering additional information in other columns. Like records are found after you press the **Tab** key.

5 To remove the Grid Filter Row, click the **Show Speed Search Bar** toolbar.

If you have the **Always Display Speed Search Bar (Search Grid)** check box selected in the Options dialog, you will need to remove the check mark before the Speed Search Bar can be removed from all grids.

6 To show all records in the grid after a search, click the **View** drop-down arrow and select the option that contains all the records.

Using the Filter on Selection Button

Use the **Filter on Selection** button to list only the records that match the information you select. You have the option to save the filtered grid.

1 Click a cell that contains the criteria you want to use in your filter.

For example, to view only the accounts in the Accounts grid that are flagged for follow-up, click a cell that contains a flag.

2 Click the **Filter on Selection** toolbar button.

3 The grid lists only the records that contain the criteria you selected. Using the previous example in step 1, the Accounts grid lists only those accounts that have been flagged for follow-up.

4 To return to the previous view before you sorted, click the **Turn Off Filter** toolbar button.

Using the Turn Off/On Filter Button

The **Turn Off/On Filter** toolbar button has two features. When you filter a grid using the **Filter on Selection** or **Advanced Filter** toolbar buttons, the **Turn Off Filter** toolbar button is automatically depressed to show the grid is being filtered. When a grid is filtered, click the **Turn Off Filter** toolbar button to return to the previous grid layout.

If the **Turn On Filter** button is active, you can click this button to return to the last filtered grid. The sort function does not retain sorting history, so when you select another view, or close the program, the sorting information is erased. If you want to save specific views, refer to "Creating and Saving Views in the View Manager" on page 3–36.

Using the Sort in Ascending Order Button

Use the **Sort in Ascending Order** button to sort the selected column in the grid alphanumerically. Alphanumeric order sorts from lowest number to highest number and/or from A to Z.

Click any cell within the column you want to sort, then click the **Sort in Ascending Order** button.

Using the Sort in Descending Order Button

Use the **Sort in Descending Order** toolbar button to sort the selected column in the grid in reverse alphanumeric order or descending order. Descending order sorts from the highest number to the lowest number and/or from Z to A.

Click any cell within the column you want to sort, then click the **Sort in Descending Order** button.

Using the Advanced Sort Button

The Advanced Sort feature is a convenient way to sort your records using one or more sort criteria. Use the **Advanced Sort** button to sort records in the columns and sort records in the order you specify in the Advanced Sort window. You can create up to three different sorts.

1. Click the **Advanced Sort** toolbar button.
2. Click the drop-down list in the **Sort By** section to specify a column from the grid to sort.
3. Select the **Ascending** radio button to sort in ascending or alphanumeric order, or the **Descending** radio button to sort in descending or reverse alphanumeric order.
4. You can add up to three sorting criteria for the same sort. Repeat steps 2 and 3 to add additional sorting criteria.
5. Click **OK** to begin the sort, or **Cancel** to exit the Advanced Sort on Account window without sorting.

Customizing Columns

Because grids are one of the main working areas in CRM, they are almost entirely customizable. You can add and delete columns in each grid, giving you only the information you use most, and move the columns to view in any order from left to right, allowing you to see the important information first.

Customizing Columns

Each column in a grid is comprised of certain fields in the details window. Add or delete columns for each grid, and move those columns in the order you choose from the Customize Columns window. Column manipulation is not associated with saving views.

Be careful when customizing columns. All the saved views in the current grid assume the columns you customize, even if the filtered criteria includes the columns you delete. For example, if you save a view called “Type” that includes a new column entitled Account Type, then select another view and decide to customize columns. In customizing, you delete the Account Type from the grid. When you return to the “Type” view, the Account Type column, even if you filtered using the account type, does not appear in the view. Note that the information in the Account Type view is still filtered, but the Account Type column is no longer visible.

1 Select **View > Columns > Customize** from the main menu, or right-click in the grid you want to customize and select **Columns > Customize** from the menu.

   Note: To customize “Line Item for...” panes, right-click in the grid you want to customize and select **Columns > Customize** from the menu.

   Different column names appear in the Customize Columns window depending on the grid you are currently viewing. The columns available for the grid are located to the left under Available Fields, and the columns you currently view in the grid are listed on the right under Show These Fields in this Order. To add a user-defined column to the Available Fields list, refer to "Using the User Defined Fields Feature" on page 13–38.

   Note: You cannot add user-defined columns to line item grids.

2 To add one or more columns to the grid, select the column title(s) you want to include in the Available Fields list.

   The **Add** button becomes active.

3 Click **Add** to add the selected column(s) to the Show These Fields in this Order field on the right.

4 To remove one or more columns from the current viewing grid, select the column(s) in the Show These Fields in this Order field.

   The **Remove** button becomes active.

5 Click **Remove** to remove the selected column(s) from the current view.

6 To specify the order in which to view each column in the grid, click the column you want to move in the Show These Fields in this Order.

   The first column heading at the top of the list is displayed on the grid as the first column to the left of the grid. The last column heading listed is displayed on the grid as the last column to the right of the grid.

7 Click the up or down arrows to the right of the field to move the column heading up or down.

   The column heading remains highlighted, so you can easily identify where your column is located, and moves one column at a time each time you click the up or down arrow with your mouse.

8 Click **OK** to apply the column layout to all views in this grid, or **Cancel** to exit the Customize Columns window without changing the column layout.

9 Click **Reset** to set the column layout back to the default layout, or if the column layout was not the default you can revert to the previously saved column layout by right-clicking within the selected grid and select **Columns > Restore Saved Layout**. You can also select **View > Columns > Restore Saved Layout** from the main menu.

Note: To revert to the previous column layout in “Line Item for...” panes, right-click in the grid and select **Columns > Customize** from the menu.

10 To reset columns to the CRM default column layout, right-click your mouse in the appropriate grid and select **Columns > Restore Default Layout** from the menu. You can also select **View > Columns > Restore Default Layout** from the main menu.

Note: To reset columns to the CRM default column layout in “Line Item for...” panes, right-click in the grid and select **Columns > Customize** from the menu.

Maintaining Views in Grids

Because grids are one of the main working areas in CRM, they are almost entirely customizable. You can save multiple filtered grid layouts using advanced filtering and recall them easily from the **View** toolbar button. Views can be created, replaced, assigned, copied, and deleted, based on your security settings.

Two different features within the Views component are contained in CRM: My Views and View Manager. Refer to the following for more information.

My Views – The My Views features allows users who have the appropriate permissions to create, replace, delete, copy and save their own views. You can deny access to the entire feature or certain actions within this feature using the User security settings within the Object tab. See “Using the Security Feature” on page 13-22.

View Manager – The View Manager is an administrative function that allows you to access all views within CRM, assign views to other users, and select default views for users. You can deny access to this feature or certain processes within this feature using the User security settings within the Object tab. See “Using the Security Feature” on page 13-22.

Note: You cannot save grid layouts for the “Line Item for...” panes (for example, Line Items for Quote and Line Items for Service Order).
Also, you cannot edit or delete the CRM view, such as All Accounts or All Opportunities, etc. This view is not filtered, so it contains all the allowable record types in the database.

My Views

The My Views feature allows you to create, save, copy, replace, and delete views. The My Views dialog contains only the views that you create or ones that have been assigned to you using the View Manager. Depending your security settings, you may not be able to process every function available in the My Views dialog. See "Using the Security Feature" on page 13–22.

Accessing My Views

Select **Views > My Views** from the main menu.

Refer to the following sections to perform any of the functions available in the My Views dialog.

Creating and Saving Views in My Views

1 Use the Advanced Filter toolbar button, or **View > Advanced Filter** to filter the appropriate grid to select the records you want to view. Refer to "Using Filters in Grids" on page 3–25.

2 Select the **View > My Views** from the main menu.

   The My Views dialog contains two sections: My Views and Filter Statement. The My Views section allows you to view all the views you have saved for this grid, and whether or not a default view is selected for the user. The Filter Statement section contains the filter statement for each view.

3 To create the view in the My Views dialog, right-click within the My Views section and select **New** from the menu.

   You can also use the Scroll bar to scroll down to the bottom of the My Views list and click in the empty row to create a new view.

4 Enter a description of the view currently in your grid in the Description field.

   The Owner field is a read-only field that automatically populates with the user name of the user that created the view.

5 If you want this view to automatically appear every time you access this grid, select the **Default** check box.

6 Click **OK** to save the view and exit the My Views dialog, or click **Apply** to save the view without exiting the My Views dialog.

   The view you saved is now accessible in the **View** drop-down list on the toolbar.

   To exit the My Views dialog without saving the view, click **Cancel**.

Copying Views in My Views

The Copy Views feature is handy if you want to create a new view that is similar to an existing view.

1 Select **View > My Views** from the main menu.

2 Find and select the view you want to copy.

3 Right-click and select **Copy View** from the menu.

   The view is automatically copied, and the view is added to the bottom of the My Views list.

   The description of the view is “Copy of” in addition to the name of the view you copied. For example, if you copied a view entitled “My Accounts” the copy of the view contains a description entitled, “Copy of My Accounts.”

4 To rename the description of the copied view, click in the Description field of the copied view and specify the new description.

5 To assign this copied view as a default, select the **Default** check box.

6 Click **OK** to save the copied view and exit the My Views dialog, or click **Apply** to save the copied view without exiting the My Views dialog.

The view you saved is now accessible in the **View** drop-down list on the toolbar for the user you specified.

To exit the My Views dialog without saving the view, click **Cancel**.

Replacing Views in My Views

Replacing Views is a shortcut feature that allows you to replace a view instead of creating a new view and deleting the unwanted view.

1 Create the view you want to use to replace an existing view in the appropriate grid.

2 Select **View > My Views** from the main menu.

3 Find and select the view you want to replace. This is the existing view you do not want to keep in your My Views dialog.

4 Right-click the selected view and select **Replace View (with current grid view)** option from the menu.

The selected view is replaced with the view in the open grid.

The description is kept the same, however you can change this if necessary. Refer to “Creating and Saving Views in My Views” for more information.

5 When you are finished, click **OK** to save your changes and return to the open grid.

Click **Apply** to save your changes without exiting the My Views dialog.

Click **Cancel** to exit the My Views dialog without saving your changes.

Deleting/Undeleting Views in My Views

1 To delete a filtered grid you saved, select **View > My Views** from the main menu.

2 Find and select the view(s) you want to delete from the My Views list.

3 Right-click the view(s), then select **Delete Records** from the menu.

4 Click **OK** to delete the selected record(s) and return to the grid.

Click **Apply** to delete the selected record(s) and remain in the My Views dialog.

Click **Cancel** to exit the My Views dialog without deleted the selected records.

5 To remove one or more records that has been marked for deletion, select the record(s), then right-click the record(s) and select **Undelete Record(s)** from the menu.

Note: You cannot undelete records once the record(s) have been saved. The undelete function is only available if the records have been marked for deletion, but have not been saved.

View Manager

The View Manager feature allows the system administrator to maintain all views created in CRM. You can create and maintain all views, assign views to other users, as well as assign other users a default view. Refer to the following procedures for more information.

Accessing the View Manager

Select **View > View Manager** from the main menu.

You can create and maintain views, assign views to users, assign a default view, and delete views from this dialog. See the appropriate procedures for instructions and additional information.

Creating and Saving Views in the View Manager

1 Filter and/or sort the appropriate grid to select the records you want to view. See "Using Filters in Grids" on page 3–25.

2 Select the **View > View Manager** from the main menu.

The View Manger dialog contains two sections: All Views and Filter Statement. The All Views section allows you to view all the views saved in CRM for the open grid. This section also contains the description of the view, the owner assigned to the view and whether or not a default view is selected for the owner. The Filter Statement section contains the filter statement for each view.

3 To create the view in the View Manger dialog, right-click within the All Views section and select **New** from the menu.

You can also use the Scroll bar to scroll down to the bottom of the All Views list and click in the empty row to create a new view.

4 Enter a description of the view currently in your grid in the Description field.

5 Click in the Owner field.

6 Click **Owner** to assign the view to a user. Your User ID is automatically populated as the owner.

When you select a user as the owner, the view is available in the assigned owner’s grid when you save this change to the database.

7 If you want this view to automatically appear every time the owner accesses this grid, select the **Default** check box.

8 Click **OK** to save the view and exit the View Manager dialog, or **Apply** to save the view without exiting the View Manager dialog.

The view you saved is now accessible in the **View** drop-down list on the toolbar for the owner assigned to the view.

To exit the View Manager dialog without saving the view, click **Cancel**.

Copying Views in the View Manager

The Copy Views feature is handy if you want to assign a copy of an existing view to another owner, or create a new view that is similar to an existing view.

1. Select **View > View Manager** from the main menu.
2. Find and select the view you want to copy.
3. Right-click and select **Copy View** from the menu.

   The view is automatically copied, and the view is added to the bottom of the All Views list.

   The description of the view adds “Copy of” in addition to the name of the view you copied. For example, if you copied a view entitled “Elis Accounts” the copy of the view contains a description entitled, “Copy of Elis Accounts.”
4. To rename the description of the copied view, click in the Description field of the copied view and specify the new description.
5. To assign this copied view as a default view, select the **Default** check box.

   When you select this check box, this default view automatically populates the grid when the owner accesses the grid.
6. Click **OK** to save the copied view and exit the My Manager dialog, or click **Apply** to save the copied view without exiting the View Manager dialog.

   The view you saved is now accessible in the **View** drop-down list on the toolbar for the user you specified.

   To exit the View Manager dialog without saving the view, click **Cancel**.

Replacing Views in the View Manager

Replacing Views is a shortcut feature that allows you to replace a view instead of creating a new view and deleting the unwanted view.

1. Create the view you want to use to replace an existing view in the appropriate grid.
2. Select **View > View Manager** from the main menu.
3. Find and select the view you want to replace. This is the existing view you do not want to keep in the CRM database.
4. Right-click the selected view and select **Replace View (with current grid view)** option from the menu.

   The selected view is replaced with the view in the open grid.

   The description is kept the same, however you can change this if necessary. Refer to “Creating and Saving Views in My Views” for more information.
5. When you are finished, click **OK** to save your changes and return to the open grid.

Click **Apply** to save your changes without exiting the View Manager dialog.

Click **Cancel** to exit the View Manager dialog without saving your changes.

Deleting/Undeleting Views in the View Manager

1 To delete a filtered grid you saved, select **View > View Manager** from the main menu.

2 Find and select the view you want to delete from the All Views list.

3 Right-click the view, then select **Delete Records** from the menu.

4 Click **OK** to delete the selected records and return to the grid.

Click **Apply** to delete the selected records and remain in the View Manager dialog.

Click **Cancel** to exit the View Manager dialog without deleted the selected records.

5 To remove one or more records that has been marked for deletion, select the record(s), then right-click the record(s) and select **Undelete Record(s)** from the menu.

Note: You cannot undelete records once the record(s) have been saved. The undelete function is only available if the records have been marked for deletion, but have not been saved.

Using the Option Bar

Option bars (also known as Drill Down bars or Drill bars) allow you to quickly locate information related to a selected record in the current grid or window without having to change from one feature to another. Option bars appear at the top of most grids and windows in CRM. Option bars contain option buttons that open grids or windows in the bottom pane when clicked. Option buttons contain records that are associated with the record you select in the grid or window.

For example, to view all the contacts for a selected account, select the account in the Accounts grid, then click the **Contacts** option button. The Contacts pane opens with the contacts for the selected account.

Most options on the option bar are also main features in CRM, like the **Contacts** option button. This allows option features to function just as if you opened the grid or window in the feature itself. The options discussed in this section are fully functional, allowing you to add, edit, and delete items in the pane. Some options, however, are only available or fully functional when you access them through selected grids or windows, such as **Documents** (in Accounts, Contacts, and Competitors), **Receivables** (in Accounts), **Receivables Line Items** (in Accounts), **Issues** (in Calls), **Contract Line Items** (in Contracts), **Organization Charts** (in Accounts and Competitors), **Details** (in Service Orders), and **Payments** (in Contracts). For information regarding these options, refer to the grid or window where these options are displayed.

Accessing Options

1 From the appropriate grid or window, click the option bar button you want to view, or click the down arrow beside the option button to select additional options.

The options appear in the bottom pane. This example uses the Accounts Grid, and the Opportunities option.

Every record in the bottom pane relates to the selected record in the top pane. In this example, all opportunities for the selected account, Able Manufacturing, are listed in the bottom pane.

Note: Make sure the bottom pane is active by clicking anywhere within the pane.

2 If there are details for the records listed in the bottom pane, select the appropriate record and click the **Toggle** button to view details for the selected record.

The details of the selected opportunity replaces the associated opportunities in the bottom pane.

3 To return to the previous pane, click the **Toggle** button.

4 To exit the bottom pane, click the **x** in the top right corner of the pane. The grid then occupies the entire working area again.

Maintaining Options

The Options window allows you to alter grid and calendar appearance, activate specific system functions such as prompting a warning when deleting records, specify executable directories for VISUAL Quality and VISUAL, and select a dialer and view the selected dialer's specifications.

To access Options, select **Tools > Options** from the main menu.

The Options window contains the following tabs: **Appearance**, **Back Office, Dialer, Mail, Merge**, **Advanced,** and **Calendar**.

Specifying Appearance Options

1 Click the **Appearance** tab.

2 Specify the following option in the Grid Settings section:

Max Selected Rows - Specify the maximum number of rows a user can select in a grid. If you leave this field blank, the system defaults to 99.

Always Display Speed Search Bar (Search Grid) – Select this check box to display the Speed Search Bar in every CRM grid. The Speed Search Bar is a search function used to find like records. The Speed Search Bar is displayed above the column header in every grid.

3 Select the **Show Explorer Graphic** check box in the **Main Form** section if you want the Explorer Graphic to appear at the top of the navigation bar.

4 Select the **Show Full Day Strip** check box in the **Calendar** section if you want to view a full day time strip beside the Appointments section in the Calendar feature. The Full Day Strip allows you to view all the appointment times for the day without using the scroll bar in appointments.

Specifying Settings Options

Click the **Settings** tab.

Enter the following information in the Settings tab:

Save grid layout(s) for each database – You can save grid layout files in a single directory or separate directories for each database if users sign into multiple databases. Select this check box if you want a sub-directory created for each database in the Grid Layout directory.

Remove the check if you want all grid layout files stored in the Grid Layout directory.

A grid layout file is a collection of Column Positions and Column Widths for each main grid. These settings are saved when you select **Columns > Save Column Layout** from the View menu. Each file is named according to the type of grid that it represents, for example the Account grid layout settings are contained in a file called Account.grd. When you use the Customize Columns dialog, the same grid file is created along with a second file that contains the column names that are to be displayed on the grid. This file had a .fld extension. Therefore, after creating Customize Columns for the Account grid, the user will have modified two files Account.grd and Account.fld.

Launch VM using .vmx file – Clear this check box if you would like to access VISUAL directly when using Back Office modules. This is the default setting.

For some CRM users, system security settings could interfere with accessing VISUAL directly. These users can access VISUAL through VMX files. If you would like to access Back Office modules indirectly through VMX files, select this check box. If you select this check box, verify that VM.exe is specified as the program to open VMX files. Use Microsoft Windows Folder Options to establish the connection.

Grid Layout Directory – Click the **Grid Layout Directory** button beside the Grid Layout Directory field to specify the location that is used to read and write .fld and .grd files in CRM.

VISUAL Manufacturing Executable Directory – Click the **VISUAL Manufacturing Executable Directory** button beside the VISUAL Manufacturing Executable Directory field to specify the location of the VISUAL executable. This path is used to access windows in VISUAL, such as the CRM features found in the Back Office module.

VMFG .VMX Directory – If you selected the Launch VM using .vmx file, specify the location where you would like to store the VMX files. Each user should save to a local or unique location to avoid conflicts when more than one user is accessing Back Office features. If you leave this field, blank, the VMX files will be stored in the same directory as where your executables are installed.

CRM Online Books Directory – Click the CRM Online Books Directory button to specify the location of the CRM PDF help.

VISUAL Quality Executable Directory – Click the VISUAL Quality Executable Directory button beside the VISUAL Quality Executable Directory field to specify the location of the VISUAL Quality executable. This path is used to gain access to VISUAL Quality in the Back Office module.

Specifying Dialer Settings

Click the **Dialer** tab.

Click the drop-down list beside the Device To Use for Dialer field to specify the TAPI (Telephony Applications Programming Interface) device. You must specify a device before you can use the dialer.

Specifying Mail Settings

1. Click the **Mail** tab.
2. In the **Email profile** field, specify the profile information for the Email program you want opened in CRM. Profile information can be found in the mail area of the control panel by clicking “Show Profiles.”
3. In the **Max Email Rows** field, specify the maximum number of emails to display in email folders. The value that you specify is applied to all email folders. For example, if you specify 30, then the 30 most recent emails based on received date are displayed in your Inbox folder, and the 30 most recent emails based on sent date are displayed in your Sent Items folder. To display all emails, specify 0. Note that performance issues can arise and errors can occur if you display a large number of emails in folders.

4 Select the **Email Notification** check box if you want to the CRM email system to notify you of changes. Clear the check box if you do not want to be notified when emails are received.

5 Select **Don’t Display Preview Pane** if you do not want a portion of the email text displayed in the grid. Clear the check box if you would like to view a portion of the email in the grid.

6 If you have designated Microsoft Outlook as your default email program, the system enables the **Use Outlook Form with Outlook View Control** check box. Select this check box to use the Outlook form and view control. Clear the check box to use the CRM form and message window.

Alternatively, select **Use Outlook Form with Standard View** if you want to send email using the Outlook email interface, but are having trouble using the Outlook View Control. This populates your inbox and outbox using a recordset based on a MAPI interface.

If both options are unchecked, then the standard view along with the standard email form are used.

Note: To designate Microsoft Outlook as the default email program: in Microsoft Outlook, click **File > Options > General**. Under **Start up options**, select the **Make Outlook the default program for Email, Contacts, and Calendar** check box.

7 Select the **Save History** check box in the **Email History Options** section if you want to track all email you send. The email you send is automatically entered in the History feature.

8 Select the **Private** check box if you want the historical record of the email to only be viewable by the user. Clear the check box if email history is to be viewable by others.

9 When you have established your user options click **OK.**

Note: If you have modified your email profile > a message notifies you that the settings will be effective once VISUAL CRM is restarted. Click **Yes** to confirm.

Specifying Merge Options

1 Click the **Merge** tab.

2 Click the **Document Directory** browse button or specify the location where you want to keep your templates in the Document Directory field.

3 Click the **Temp Directory** browse button or specify the location where you want to keep your temporary files you created for your merge documents in the Temp Directory field. Your merged documents are temporarily stored until you save your documents in a new location.

4 In the **Output** section, select how you want your results compiled after you merge your documents.

Choose from one of the following options.

New Document – Your merged data is automatically opened in Microsoft Word when you select this option.

Printer – Select this option if you want merged data to automatically print a Microsoft Word document to your default printer.

Email as Attachment – Select this option if you want merged data to be sent to a text file and emailed as an attachment. This selection is only available if Microsoft Word is not available.

Email as Body – Select this option if you want merged data to be emailed within the e-mail message, not as an attachment. This selection is only available if Microsoft Word is not available.

5 Click **OK** to save your changes, or click **Cancel** to exit the Options window without saving your changes.

Specifying Advanced Options

1 Click the **Advanced** tab.

2 Enter the following information in the Advanced tab.

Record Warning Limit – Specify the maximum number of records allowed when accessing a grid before the user is prompted with a warning.

The user is notified that the grid accessed exceeds the limit and indicates the number of records the grid exceeds. You set the limit in the Record Warning Limit field. Three choices are offered: Filter the grid before opening by clicking **Filter**, continue to open the grid without filtering by clicking **Continue**, or cancel access of the specified grid by clicking **Cancel**.

See “Using Filters in Grids” on page 3-25. You are continually notified after filtering if you still exceed the record limit.

Connection Timeout – Specifies the number of seconds to wait for connecting to the database to complete.

Prompt When Deleting Records – Select this check box to prompt the user to confirm their deletion when they delete records.

Do not select this check box if you do not want to prompt the user to confirm their deletion when they delete records.

Suppress Office dependency Warning – Select this check box to suppress the dependency warning message that occurs when a user logs onto a machine that has CRM installed without Microsoft Office.

Enable Extended Error Reporting – Select this check box to view extended error information in either a message box, or an Error Log File.

If you enable the **Extended Error Reporting** check box, click the **To Message Box** radio button to view extended error information in the message box, or the **To Error Log File** radio button to view extended error information in the Error Log File.

3 Click **Begin Memory Log** to create image log of navigation bar and toolbar user actions.

A snapshot of the CRM window is saved each time the user clicks on the Navigation bar, or the toolbar. The snapshots are saved in an Excel compatible file titled **CRMMemoryLog.csv**.

Use the Memory Logger function if you are troubleshooting with a support technician.

4 In the dialog, click **OK** to begin memory logging, or **Cancel** to return to the CRM Options dialog without creating a memory log.

5 Click **OK** to save your changes or additions, or **Cancel** to exit the Options window without saving changes or additions.

Specifying Calendar Options

1 Click the **Calendar** tab.

2 In the Day Calendar section, specify the following:

Time Start and Time End - Use these fields to specify the range of hours you would like to display in the Calendar window. For example, if you specify 6:00 AM in the Time Start field and 7:00 PM in the Time End field, the system displays all hours between 6:00 AM and 7:00 PM. The system uses these settings if the Calendar is too large to display in the window and no appointments are scheduled for the day. Use the drop-down buttons to specify the times.

Prime Time and Prime Time End - Use these fields to specify normal business hours. Use the drop-down buttons to specify the times.

Time Scale - Use this field to specify the time increments you would like to display in the calendar. Your choices are 5, 10, 15, 30, and 60 minutes.

3 In the Appointments section, specify the time increments you would like to use for the start time and end time of appointments in the Time Scale field. Your choices are 5, 10, 15, 30, and 60 minutes. For example, if you choose 5 minutes, an appointment could start at 10:10 and end at 10:45. If you choose 10 minutes, an appointment could start at 10:10 and end at 10:40.

4 Click **Ok** to save your changes.

Maintaining Sales Options

Use the Sales Options window to assign logged in Sales Reps as the owner to new accounts, opportunities, and quotes; automatically create tasks for completed sales plans on opportunities; launch one of three different windows when viewing an order detail item from CRM, and specify the location of the MPC database and Work Order Text file.

1 Select **Tools > Sales Options** from the main menu.

The General tab allows you to select whether you want sales reps to automatically be assigned as the owner for certain records they create. This is beneficial to Sales Managers that do not want to be assigned as the owner for all sales records created.

2 Click the **General** tab if necessary.

3 Select the **Assign New Accounts, Opportunities and Quotes to Logged in Sales Rep** check box to assign the logged in sales rep who is creating the records as the owner for new accounts, opportunities, and quotes you create. The sales rep creating the records is automatically assigned as the owner of the record.

You can view the owner by customizing your grid columns. Refer to "Customizing Columns" on page 3–31.

4 Click the **Opportunities** tab.

5 Under the heading **When**, select when to automatically create a task in your Tasks Grid and Calendar tasks pad when you select an Actual Start Date for each sales activity assigned to an Opportunity.

When the next task should be generated:

Never – Select this option to never create a task.

Always – Select this option to always create a task.

Prompt – Select this option to ask you whether you want to create a task or not.

6 Under the heading **To Opportunity**, select whom to automatically create a task for in your Tasks Grid and Calendar tasks pad when you select an Actual Start Date for each sales activity assigned to an Opportunity.

Whom the next task should be generated for:

Creator – The user who created the opportunity.

Owner – The opportunity owner.

Sales Rep –The sales representative assigned to the opportunity.

For more information on this setting, refer to "Using the Opportunities Feature" on page 7–9.

7 Click the **Orders** tab.

8 Select one of the three VISUAL windows to open when viewing an order: Order Entry, Order Inquiry, and Order Management.

9 Click the **Configurator** tab.

The Configurator tab allows you to specify necessary information for the Configurator to function properly.

10 If you use the MPC (Master Product Configurator), click the **Browse** button in the **MPC Database Location** section to specify the location of the MPC database.

This field must be populated with the appropriate data in order for the MPC to function.

11 Click the **Browse** button in the **Work Order Text File Directory** section to specify the location of the work order text file. This field is used by the MPC (Master Product Configurator). If you use MPC for quotes and orders, you must specify a path in this field.

This field must be populated with the appropriate data in order for the MPC to function.

12 Click the **Browse** button in the **Master/Work Order Input Utility** section to specify a temporary location for the MPC to generate work orders.

13 Click **OK** to save your changes/additions and exit the Sales Options window, or **Apply** to save your changes/additions and remain in the Sales Options window.

Click **Cancel** to exit the Sales Options window without saving changes/additions.

Chapter 4: Common Features

This chapter includes:

Topic

Using the Sign In Feature

You can sign in to another CRM database using the CRM program that is currently running.

1 Select **File**, **Sign In** from the main menu.

2 Specify this information:

   Database Type – Specify the database engine you use.

   Server – Specify the server where your database resides.

   User ID – Specify your User ID.

   Password – Specify the password associated with the User ID.

   Database – Specify the name of the database.

3 Click **Sign In**.

Using the Connection Monitor

The Connection Monitor shows you open connections to the database, and allows you to view SQL statements.

1 Select **Tools > Connection Monitor** from the main menu.

   The Connection Pool Monitor indicates the user name of the person connected, what database name or server name each user is running, the state in which the user resides, the time the connection began, and the time the connection ended.

2 Click the **Attach to Pool** button, or right-click your mouse and select **Attach to Pool** from the menu, to show you what connection pool is currently running.

   To detach from the pool, select the **Detach From Pool** button or right-click your mouse and select **Detach From Pool** from the menu.

3 Right-click your mouse within the Connection Pool Monitor window to access other functions such as **Pool Statistics**, **SQL Viewer**, **SQL Logging Options**, **Freeze Updates**, and **Discard Unused Connection**.

4 Click the **Close** button to exit the Connection Pool Monitor window.

Using the Dial Function

Accessing the Dial function allows you to dial phone numbers using your system modem. Phone numbers can be automatically pulled from any record you select in grids that contain the Dial function and the phone numbers are listed for you in the Dialer window.

1. Select **Actions > Dial** from the main menu.

   The Dialer window lists all phone numbers associated with the selected record. In the example above, the record selected was an account, so the account phone number, and primary and alternate contact phone numbers appear in the list.

2. Select the phone number you want to dial, then click the **Dial** button.

   You can also specify the number you want to dial in the Number to Dial field box below the list box.

3. Select the Close Window When Dialing check box to exit the Dialer window when dialing the phone number selected.

4. To exit the Dialer window, click the Close button.

Maintaining Merge Setup

The Merge Setup function allows you to create and maintain Mail Merge templates and assign default templates. You can create, edit, and delete templates, and edit the settings of a template using this option.

The Merge Setup is available from most CRM grids and detail forms.

Adding a New Mail Merge Template

1 Select **Actions > Merge Setup** from the main menu, or right-click your mouse within the grid and select **Merge Setup** from the menu.

2 Select **New Document** to create a new template for your mail merge function.

3 Click **Next** to continue.

4 Select one of the two options.

Current Grid – If you want the data in the current CRM grid used as a default for all mail merges, select this option.

SQL – If you want the information in a SQL table used as a default for all mail merges, select this option.

a Click **Next**.

b Enter information in the fields on this dialog.

Enter SQL Select and From – Specify the search condition to be returned by the SQL query for the columns and the tables from which they come.

Enter SQL Where – Specify the search condition for the rows to be returned by the SQL query.

5 Click **Next**.

6 Specify this information in the fields on this dialog:

Description – Specify the name of your template in the Description field.

File Name – Click the **File Name** browse button to specify a location where you want the template to be saved.

Set as Default – Select this check box to use this template as a default for all mail merges created with the Send Letter feature.

All User's – Select this check box to allow all users access to reports that SYSADM created. Users are allowed to run, but not edit, the reports.

7 Click **Finish**.

Microsoft Word is automatically opened so you can create your mail merge template.

8 Specify CRM field entries by clicking the **Insert Merge Field** button, and then select the data you want to insert from the list.

9 When you are finished creating your template, click the **Save** toolbar button.

10 Exit Microsoft Word to return to CRM.

Editing a Mail Merge Template

1 Select **Actions > Merge Setup** from the main menu, or right-click your mouse within the grid and select **Merge Setup** from the menu.

2 Select the **Edit Document** radio button, then click **Next**.

3 Click the **Description** drop-down list to select a description, or specify the description in the Description field.

The File Name field is automatically populated.

4 To set the selected merge template as a default (the template is used automatically when you select the Merge Document Wizard from the appropriate grid or detail window), refer to "Editing Settings for a Mail Merge Template" on page 4–6. The Set as Default check box is not active in this function.

5 Click **Next** to continue.

The template you selected opens in Microsoft Word.

6 Make the necessary changes to the template, then click the **Save** toolbar button.

7 Select **File**, **Exit** to exit Microsoft Word and return to CRM.

Editing Settings for a Mail Merge Template

1 Select **Actions > Merge Setup** from the main menu, or right-click within the grid and select **Merge Setup** from the menu.

2 Select the **Edit Settings** radio button, then click **Next** .

3 To change the selected template’s description, edit the **Description** field.

4 To change the selected template’s file name, edit the **File Name** field.

5 To use the selected template automatically every time you use the Mail Merge function, scroll to the right of the grid, and then select the **Default Doc** check box.

6 To allow all CRM users access to a template, scroll to the right of the grid, and then select the **All Users** check box.

7 Click **Finish** to save your edits and exit the Merge Document Setup Wizard, or click **Cancel** to exit without saving your edits.

Deleting a Mail Merge Template

1 Select **Actions > Merge Setup** from the main menu, or right-click your mouse within the grid and select **Merge Setup** from the menu.

2 Select the **Edit Settings** radio button, then click **Next**.

3 To delete a mail merge template, right-click on the template's description or file name, and then click Delete Record.

   To undelete a mail merge template, right-click on the template's description or file name, and then click Undelete Record.

4 Click **Next**.

5 Click **OK** to return to the Merge Document Setup Wizard dialog.

Using Mail Merge

Use the Mail Merge function to merge correspondence for one or more CRM customers, contacts, and employees using templates created in Microsoft Word. The Mail Merge function can be accessed from any CRM grid or detail window that contains CRM customers, contact, and employees. The Merge Document Wizard collects CRM record information you specify and incorporates the data into the specified Microsoft Word template.

Note: You must specify Mail Merge templates in the Merge Setup function before using the Mail Merge function.

1 Open the grid that contains the data you want to incorporate in a mail merge.

You can select specific records to include in the mail merge from the open grid, or you can filter the grid and then include the entire grid in your mail merge. Refer to "Using Filters in Grids" on page 3–25 for more information on filtering grids.

2 To perform a mail merge on specific records, select the records you want to include.

3 Click the **Merge Document Wizard** toolbar button, or select **Actions > Mail Merge** from the main menu.

4 Click the **Description** drop-down list to select the template you want to use to for the Word Merge.

Note: All templates are displayed in the location you specified in the Merge tab of the Options window.

5 Click **Next** to continue.

At any time, you can click **Cancel** to exit the Merge Document Wizard without creating a mail merge, or the **Back** button to return to the previous dialog in the Merge Document Wizard.

6 Choose the data source for your word merge by selecting one of the three options.

All Records – Select this option to use all the records you selected in the open grid in the word merge.

Selected Records – Select this option to use only the records you selected in the open grid in the word merge.

SQL – Select this option to specify a SQL statement.

7 Click **Next** to continue.

If you selected the **SQL** radio button, continue with this step. Skip to step 9 if you did not choose the **SQL** radio button.

8 Specify your SQL statement in the SQL Select and From and the Enter SQL Where text boxes.

9 Click **Next** to continue.

10 Select the type of output you want to create once your mail merge is complete. Choose one of the following options.

New Document – A new document of your merged document(s) is created in Microsoft Word.

Printer – Your merged document(s) are printed to your specified default printer.

Email as Attachment – Select this option if you want merged data to be emailed as an attachment.

Email as Body – Select this option if you want merged data to be emailed within the email message, not as an attachment.

11 Click **Finish**.

The Word template is automatically merged with the data you requested in the CRM grid using Microsoft Word. The records produced from the data and template are created as new documents in Word.

Sending a Document

Use the Send Document feature to create tasks for employees to mail printed company material to specified contacts or accounts, or email electronic documents to contacts. Each document you send is recorded in several places to help you track the customers who received literature.

You can send a printed or electronic document that is not entered in the Catalog feature and a file of that document is automatically entered in the Catalog feature. This file, however, is not a full entry like the catalog items you specify in the Catalog feature.

You must specify document types in the Document Category Maintenance window in order to specify company materials in the Catalog feature. Refer to "Maintaining Document Types" on page 2–9.

Attaching a Printed Document to Accounts or Contacts

When you use the Send Document feature for printed documents on an account or contact, a task is created for an employee to mail the printed materials to contacts associated with an account or contacts.

1 From the Accounts or Contacts grid, select the account(s) or contact(s) to which you want to send information.

2 Click the **Send Printed Document to Account(s)/Contact(s)** toolbar button, or right-click on the selected account(s) or contact(s) and select **Send Printed Document to Account(s)/Contact(s)**.

The dialogs displayed in this procedure were captured while sending a document to a contact.

3 Click **Next** to continue.

At any time, you can click **Cancel** to cancel the wizard and return to the Accounts or Contacts grid, or click **Back** to return to a previous dialog in the Attach Document Wizard.

4 Select the **Printed Document** radio button.

5 Click the **Catalog ID** button beside the Catalog ID field to choose the type of material you want to send.

The items in the Catalog ID list include all the printed catalog items you entered in the Catalog Items grid under the Catalog feature.

6 Click **Next**.

7 Select the contacts you want to use for the Document Attach function. Choose one of the following options.

Send to Selection – Send your document(s) to the contacts you selected in the open grid.

Send to All – Send your document(s) to all the contact in the open grid.

8 Click **Next** to continue.

9 Click the **Assign To** button beside the Assign To field to choose an employee to mail the material you specified.

This allows a task to be created for the specified employee in the Tasks grid. Create a default for this field in the Defaults feature on the Document tab.

10 Enter a brief description of the Task in the Subject field.

Create a default for this field in the Defaults feature on the Document tab.

11 Click the drop-down list beside the Due Date field to specify the date the task is due.

Automatically populate this field with a specific date using the Defaults feature on the Document tab. The Days until Due field adds the number of days you specify in the field to the system date when the document is sent. Refer to the "Maintaining Defaults" on page 13–3 for more information.

12 Enter any additional comments you want to include in the Comments text box.

The Document ID and the name of the printed material are automatically included.

13 Click **Finish**.

The information is created:

- A task is created for the assigned employee in the Tasks grid.
- The document sent in the **Documents** option of the selected account is recorded in the Accounts grid.
- The document sent in the **Tasks** option of the selected contact(s) is recorded in the Contacts grid.

If you sent a document to an account, all the contacts associated with that account contain a record of the document sent in the Tasks option.

If the document you sent was not included in the Catalog grid, a file of that document is automatically added to the Catalog grid. Keep in mind that this file is not the same as a catalog item you specify manually into the Catalog grid.

Using the New Contact Wizard

The New Contact Wizard guides you through step by step instructions for creating a contact, a contact for an existing account, and a contact for a New Account. The New Contact Wizard is not meant to replace the process of adding a contact or account using the New Contact or New Account window because the New Contact Wizard enters basic contact and account information and does not include all fields available in the Contact and Account details windows. To specify additional fields not found in the New Contact Wizard, refer to Chapter 5, “Using the Contacts Feature”, and Chapter 5, “Using the Accounts Feature”.

Select **Actions > New Contact Wizard** from the main menu.

You do not have to be in the Contacts grid to access the New Contact Wizard. Almost all grids and windows have access to the New Contact Wizard menu option.

Refer to the following procedures to create a new contact for a new account, create a new contact, or create a new contact for an existing account.

Creating a New Contact for a New Account

1 Select the **New Contact(s) for New Account** radio button to create a new account and an associated new contact.

2 Click **Next**.

At any time you can click **Back** to return to a previous New Contact Wizard dialog, or **Cancel** to exit the New Contact Wizard without creating a new contact and/or account.

The New Contact Wizard begins with the general Account information. After the account information is entered, you can then specify the new contact.

3 Specify this information in the New Contact Wizard dialog.

Name – Specify the name of the account.

Type – Click the drop-down list to select the type of account you are creating.

The options in the Type field are user-defined in **Tools > Maintain**, **General Codes**.

Bus. Phone – Specify the business phone number of the account.

Alt Phone – Specify the alternate phone number of the account.

Fax – Specify the fax number of the account.

Web Address – Specify the company’s website address.

4 Click **Next**.

5 Specify this information in the New Contact Wizard dialog.

Address – Specify the address of the account.

Location – Specify the location of the account.

City, State, Zip – From left to right, specify the City where the account resides, click the drop-down list and select the State where the account resides, and specify the zip code where the account resides.

Country – Specify the country where the account resides.

6 Click **Next**.

7 Specify this contact information in the New Contact Wizard dialog.

Name – From left to right, click the drop-down list to specify the honorific (Mr., Mrs., Ms., etc.) of the contact, then specify the first name, middle initial, and last name of the contact.

Position – Specify the position of the contact.

E-mail – Specify the email address of the contact.

Bus Phone – Specify the business phone number of the contact.

Fax – Specify the fax number of the contact.

Account ID – You cannot edit this field. The new account is automatically assigned an ID and you are prompted with the Account ID information when you have finished creating the Account and Contact(s).

When you click **Next**, <NEW> is automatically entered in the Account ID field.

Use Account's Address – Select this check box if you want to keep the Account's address the same for the address of the contact.

Home Phone – Specify the home phone number of the contact.

Mobile Phone – Specify the mobile phone number of the contact.

8 To specify additional new contacts to the new account, click **Next**. The same contact dialog is displayed. See step 6 and 7 for definitions and instructions.

9 When you are finished, click **Finish**.

The Account and Contact records are created and the Account ID and name, and the number of contacts created are displayed in a dialog.

Creating a New Contact

1 From the first New Contact Wizard dialog, select the **New Contact(s)** radio button.

2 Click **Next**.

You can click **Back** to return to a previous New Contact Wizard dialog, or click **Cancel** to exit the New Contact Wizard without creating a new contact and/or account.

3 Specify this information in the New Contact Wizard dialog.

Name – From left to right, click the drop-down list to specify the honorific (Mr., Mrs., Ms., etc.) of the contact, then specify the first name, middle initial, and last name of the contact.

Position – Specify the position of the contact.

E-mail – Specify the email address of the contact.

Bus Phone – Specify the business phone number of the contact.

Fax – Specify the fax number of the contact.

Home Phone – Specify the home phone number of the contact.

Mobile Phone – Specify the mobile phone number of the contact.

4 Click **Next**.

5 Specify this information in the New Contact Wizard dialog.

Address – Specify the address of the account.

Location – Specify the location of the account.

City, State, Zip – From left to right, specify the City where the account resides, click the drop-down list and select the State where the account resides, and specify the zip code where the account resides.

Country – Specify the country where the account resides.

6 To specify additional new contacts, click **Next**. The same contact dialog is displayed. Seestep 2 and 3 for definitions and instructions.

7 When you are finished, click **Finish**.

The Contact records are created and the number of contacts created are displayed in a dialog.

Creating a New Contact for an Existing Account

1 From the first New Contact Wizard dialog, select the **New Contact(s) for Existing Account** radio button.

2 Click **Next**.

You can click **Back** to return to a previous New Contact Wizard dialog, or click **Cancel** to exit the New Contact Wizard without creating a new contact and/or account.

3 Specify this information in the New Contact Wizard dialog.

Name – From left to right, click the drop-down list to specify the honorific (Mr., Mrs., Ms., etc.) of the contact, then specify the first name, middle initial, and last name of the contact.

Position – Specify the position of the contact.

E-mail – Specify the email address of the contact.

Bus Phone – Specify the business phone number of the contact.

Fax – Specify the fax number of the contact.

Account ID – Click the **Account ID** button beside this field to select an Account ID from the list. The contact you create will be associated with the Account ID you select in this field.

Use Account’s Address – Select this check box if you want to keep the Account’s address the same for the address of the contact.

Home Phone – Specify the home phone number of the contact.

Mobile Phone – Specify the mobile phone number of the contact.

4 To specify additional new contacts to the existing account, click **Next**. The same contact dialog is displayed. See step 2 and 3 for definitions and instructions.

5 When you are finished, click **Finish**.

The Contact records are created and the number of contacts created for the existing account are displayed in a dialog.

Creating History Entries

Create History notes for accounts, contacts, opportunities, quotes, competitors, calls, contracts, and service orders using the History entry window.

The History notes you create can be viewed from the record associated with the History note, or from the History window.

Note: To create a Quick History, refer to "Creating a Quick History" on page 4–17.

1 Access the grid where you want to create a history note, then select the appropriate record.

2 Click the **History** option button on the Option bar.

   The History pane contains all the history entries associated with the selected record.

3 Make sure the History For pane is active by clicking anywhere within the pane.

4 Click the **New** button on the toolbar, or right-click your mouse and select **New Record** from the menu.

5 Click the **Account** button, if necessary, to select an account for this History note. If you selected a record in the grid, the record you selected automatically is displayed in the Account field.

   You can view the details of the selected account by clicking the **Details** button beside the Account field.

6 Click the **Contact** button, if necessary, to select a contact associated with this History note. If you selected a record in the grid, the Contact field is automatically populated with the account contact, if applicable.

   You can view the details of the selected contact by clicking the **Details** button beside the Contact field.

7 Select the **Private** check box to let only the user who created the History note view the note. Leave the **Private** check box unchecked to let all CRM users view the History note.

8 Click the Type drop-down list to select a user-defined history type. You can create history types in **Tools > Maintain**, **General Codes** from the main menu.

9 Enter the following information in the **Main** tab.

   Summary – Specify a brief description of the History note in the Summary field.

   Attachments – If you want to attach a file to the history note, click the **Attachments** button to specify the location of the file.

   All attachments are copies to the path specified in the Defaults feature under the Document tab. This allows users to see attachments on all history records that contain attachments. Refer to the "Maintaining Defaults" on page 13–3.

10 Enter additional information that pertains to the History note in the text box provided below the Attachment field.

11 Click the **Details** tab.

   Refer to the following information in the Details tab. The fields in the Detail tab are inactive and cannot be changed.

Note ID – The Note ID uniquely identifies the History note.

Related To – The feature in which the note was created, such as Account or Opportunity.

__ ID – This ID indicates the record ID associated with the history item. Since there are many different records that can be associated with the History record, the field titles differ. For example, an opportunity associated with a history note has Opty ID as a field title. If a Record ID is displayed in this field, you can view details of the record by clicking the **Details** button.

User Date – You can specify a date or time in this field. The information you specify is displayed in the Note Date column of the History grid.

Creator – The user who created the History note.

Created Date – After the new History note is saved, this field is populated with the current system date.

Last User – The name of the last user to modify the History note.

Last Modified – The date when the history note was last modified.

12 Click the **User** tab to specify user-defined information.

13 Click the **Save** toolbar button to save your History note.

Creating a Quick History

Create a History note that includes basic history information from the following grids: Accounts, Contacts, Tasks, Addresses, Opportunities, Quotes, Calls, Call Issues, Contracts, Service Orders, and any application you create using the Application Builder module.

The Quick History feature is another option to creating a new History from within CRM. It saves you time and is accessible throughout the above listed grids. The Quick History function allows you to create basic information necessary for tracking purposes. To access Quick History from within the grids, press **CTRL+H** or right-click and select **Quick History** from the menu.

1 From the appropriate grid, select the record for which you want to create a Quick History note.

2 Right-click your mouse in the grid and select **Quick History** from the menu, or press the **CTRL + H** keys.

   Note: You can also access the Quick History option by selecting **Actions > Quick History** from the main menu.

3 Select the **Private** check box to let only the user who created the History note view the note. Leave the **Private** check box unchecked to let all CRM users view the History note.

4 Click the **History Type** drop-down arrow and select the type of history for this quick history note.

5 Enter a brief description of the quick history note in the Summary field.

6 The account associated with the selected record is automatically populated in the Account field, however you can change the account by clicking the browse button.

7 Click the browse button beside the Contact field to select a contact from the account's list of contacts.

8 If you want to attach a file to your Quick History note, click the browse button. Locate the file, then click **OK** to attach the file to the Quick History note.

9 Specify additional comments in the comment text box below the Attachment field.

10 Click **OK** to save your Quick History note, and return to the grid.

Creating a Quick Task

Create a task that includes basic information from the following grids: Accounts, Contacts, Opportunities, Calls, Call Issues, Quotes, Contracts, Service Orders, and any application you create using the App Builder module.

Note: The Quick Task feature is another option to creating a new Task from within CRM. It saves you time and is accessible throughout the listed grids. The Quick task function allows you to create basic information necessary for tracking purposes. To access Quick Task from within the grids, simply press CNTL + T or do a right click and select Quick Task.

1 From the appropriate grid, select the record for which you want to create a Quick Task.

2 Right-click your mouse within the grid then select **Quick Task** from the menu. You can also access the Quick Task function by pressing the **CTRL + T** keys.

3 Refer to this information to specify a Quick Task.

Category – Click the **Category** drop-down list to select a category from the list. The Category indicates the type of task, such as Administrative, Sales, etc. Task Categories are defined in the General Code Maintenance window.

Subject – Specify a description for the task in the Subject field.

Due Date – Click the **Due Date** drop-down list to select a date from the Calendar.

Reminder – Select the **Reminder** check box if you want to create a reminder for the employee assigned to the selected task.

If you select the **Reminder** check box, the two fields associated with the Reminder check box activate. Click the **Date** drop-down list to select a date from the calendar, then click the **Time** drop-down list to select a time from the list, or specify the time in the field provided.

Assign To – Click the **Assign To** button to select the employee who is assigned this task in the Assign To field.

Account – The account associated with the record you selected in the grid automatically is displayed in the Account field. To change the account, click the **Account** browse button to select from a list of accounts.

Contact – Click the **Contact** browse button beside the Contact field to choose a contact from the list of existing contacts for the selected account. This field is not required. To create a new contact, refer to "Using the New Contact Wizard" on page 4–12.

Relates To – If the record you selected is any record other than an account or contact, the Relates To check box is active. Select the **Relates To** check box if you want to Partner the selected record with the task. Leave the check box unchecked if you do not want to Partner the selected record with the task.

For example, if you create a Quick Task and select the Relates To check box on an Opportunity, when you access the opportunity record, then click the Tasks option button, the Quick Task you created is displayed in the Tasks pane. If you do not check the Relates To check box, the task is only associated with the Tasks grid, and not accessible from the selected record.

4 Click **OK** to create the Quick Task for the selected record and return to the grid.

Attaching Items to Multiple Records

You can attach a record to selected records in most CRM grids. When you attach an item or record to one or more selected CRM records, you are creating a relationship between two CRM records. The records are associated by using the option bar.

Note: Once you attach items to CRM records, you cannot remove the item from the record. The association is permanent.

1 From the appropriate CRM grid, select the record(s) to which you want to attach an item, or skip to step two if you want to attach an item to all the records in the grid.

2 Select **Actions > Attach Task(s) to** from the main menu.

3 Select one of the two radio buttons.

Selected Tasks – Select this radio button if you want to attach an item to the records you selected in the grid.

All Tasks in Grid – Select this radio button if you want to attach an item to all the records in the grid.

4 Click the **Item Type** drop-down list to select the type of record you want to Partner with the selected task(s). The options in the Item Type list differ depending on the grid you open.

5 Click the **Item ID** button beside the Item ID field to select the record you want to attach. The Item ID list contains the type of records you selected in the Item Type field.

6 Click **OK**.

You are notified that once you attach the item to the record(s), it is permanent, meaning the item cannot be removed from the record(s).

7 Click **OK** to attach the item to the selected record(s).

Click **Cancel** to return to the grid without attaching the item.

You can view the attached items by selecting the record from the grid and clicking the appropriate option bar button that you associated with the record. The item you associated with the record is displayed in the bottom pane.

For example, if you select a task in the Tasks grid, then attach a contact to the selected task, you can view the contact associated with the selected task by selecting the task, then clicking the **Contacts** option bar button. The contact you associated with the task is displayed in the bottom Contacts pane.

Maintaining Specifications

Specifications are user defined specs for a particular account, opportunity, contact, task, appointment, quote, call, issue, contract, or service order.

1 Select the record from the grid or open the details of the record to which you want to add specifications.
2 Click the **Specifications** toolbar button.
3 Enter or edit specifications for the selected record in the text box provided.
4 Click the **Save** toolbar button or select **File, Save** to save your additions or changes.
5 You can delete a specification by clicking the **Delete** toolbar button or selecting **File, Delete**.
6 Click the **Print** button, or select **File**, **Print** to output the file.
7 Click the **Close** button, or select **File, Close** to exit the Specifications window.

Printing Reports

Different options for printing reports are offered in CRM. You can use the **Print** toolbar button (or the **File**, **Print** menu option), or the **Reports** menu option from the main menu.

The **Print** toolbar button (or the **File**, **Print** menu option) lets you print a report on all records in a selected grid or a report on a specific record. You can use filtering options to customized reports printed in this fashion.

Note: Depending on the type of report you want to print, the **Print** toolbar button and the **File, Print** menu option may open different dialogs. See “Printing All Records in a Grid” and “Printing a Specific Record” for more details.

The **Reports** menu option allows you to select preloaded and user defined reports that print specific information on the record you select in the grid.

For example, the preloaded Account Details report, available in the Accounts grid, prints the details of the selected Account including associated records such as notes, contacts, calls, opportunities, quotes, orders, receivables, etc.

Preloaded reports for each grid or window that is setup to print reports are contained in CRM. You can create your own reports using SAP® Crystal Reports builder and override default reports with your own reports. You do not need Crystal report builder to view preloaded reports.

Printing All Records in a Grid

You can use the **Print** toolbar button or the **File**, **Print** menu option to print a report on all records in a specified grid. Using filter and sort options before printing, you can customize the report. For more information on filtering and sorting, see "Using Filters in Grids" on page 3–25.

1 Open the grid or window you want to print.

2 Click the **Print** toolbar button, or select **File**, **Print** from the main menu.

3 Select the paper, orientation, and margins for the printout.

4 Click the **Printer** button to define a printer; then click **OK** to output the report. Click **Cancel** to exit the Page Setup dialog without printing the report.

Printing a Specific Record

You can use the **Print** toolbar button or **File**, **Print** menu option to print a report on a specific record, such as a Service Order, Account, Quote, etc. Using filter and sort options before printing, you can customize the report. For more information on filtering and sorting, refer to "Using Filters in Grids" on page 3–25.

The **File**, **Print** menu option lets you print a report on a record, as well as sub reports on all records associated with the selected record. Associated records are those records that relate to the selected record, such as Expenses, Labor Tickets, Materials, Notes, Operations, or Tasks.

Using the Print Toolbar Button

1 Open the grid that contains the record you want to print. For example, to print a service order, open the Service Orders grid.

2 Select the record you want to include in your report.

3 Click the **Toggle** button to view details on the selected record.

4 Click the **Print** toolbar button.

A preview of the requested report is opened. You can view, print, find information, export, and close the report from the Print Preview window. Refer to "Using the Print Preview Window" on page 4–24.

Using the File Print Menu Option

1 Open the grid that contains the record you want to print. For example, to print a service order, open the Service Orders grid.

2 Select the record you want to include in your report.

3 Click the **Toggle** button to view details on the selected record.

4 Select **File**, **Print** from the main menu.

5 In the **Printer** section, specify this information.

Name – Click the down arrow to select a printer or file to print the current report.

Properties – Click the **Properties** button to define properties for the report. Refer to your Windows documentation for more information on printer properties and addition fields in this section.

6 If you created more than one report template in **Admin > Reports**, click the down arrow beside the Print What field to select the type of report you want to print for the selected grid or window.

7 Click the **Options** button.

The following example shows the Account Options dialog.

8 Select the **Print** check box of each associated record you want to include in the report.

Associated records are those records that relate to the selected record, such as Expenses, Labor Tickets, Materials, Notes, Operations, or Tasks. The associated records print at the end of the selected record.

9 Click **OK** to save your changes or click **Cancel** to exit the Options dialog without saving your changes.

10 In the Print dialog, click **OK** to output the report. Click the **Preview** button to view the report before printing or click **Cancel** to exit the Print dialog without printing the report.

If you click the **Preview** button to open the Print Preview window, see "Using the Print Preview Window" on page 4–24.

Using the Reports Menu Option

The Reports menu options differ depending on the grid or window you are viewing. The Report menu includes all the preloaded CRM default reports, and any user-defined reports you created in Crystal report builder.

1. Select the window or grid you want to print, then select **Reports** from the main menu.
2. Select the Report you want to print.

   A preview of the requested report is opened. You can view, print, find information, export, and close the report from the Print Preview window.

Using the Print Preview Window

The Print Preview window is accessed by selecting the report you want to print from the **Reports** menu. The Print Preview window creates an electronic version of the selected report.

Since reports can be customized according to columns, sorts, and filters, each report contains different information.

The Print Preview window includes a Print Preview Toolbar to help you navigate, print, export and find information in the Print Preview window. Refer to the following toolbar definitions for more information.

Close Current View – Click the **Close Current View** toolbar button to exit the Print Preview window. You can also click the **Close** button in the top right corner as well.

Print Report – Click the **Print Report** button to print a paper or hard copy of the report.

Export Report – Click the **Export** toolbar button to export the report.

If you click the **Export** button, a dialog is displayed.

Click the drop-down list beside the Format field to select how you want the report to be formatted.

Click the drop-down list beside the Destination field to specify where you want the report to be exported.Click **OK** to export the report, or **Cancel** to exit the Export dialog without exporting the report.

Refresh – Click the **Refresh** button to reload the report.

View – Click the drop-down list to select the percentage size of the report, or click the field and type the percentage you want to view. If you want to view the entire page, click the drop-down list to select **Whole Page** from the list. To view the entire width of the page, click the drop-down list and select **Page Width** from the list.

Go To First Page – Click this toolbar button to view the first page in the report.

Go To Previous Page – Click this toolbar button to view the previous page in the report.

Page – This field indicates what page you are currently viewing out of the total number of pages in the report. To view a different page, click the field and specify the page number you want to view.

Go To Next Page – Click this toolbar button to view the next page in the report.

Go To Last Page – Click this toolbar button to view the last page in the report.

Stop Loading – Click this toolbar button to stop loading the current report.

Search Text – Click the **Search Text** button specify the data you want to search. Specify the text in the Find What field, then click the **Find Next** button. When a match is found, the matching criteria is outlined in red. To locate additional matches, click the **Find Next** button again. You are notified when there are no more matches in the search.

Using the Print Setup Window

The Print Setup window gives you options, such as printing to a specific printer, and choosing properties for that printer. The Print Setup window functions the same as the File, Print option, printing all the records in the selected grid or window.

1. Find the grid or window you want to print.
2. Select **File**, **Printer Setup** from the main menu.
3. Refer to the following fields in the **Printer** section.

   Name – Click the drop-down list to select a printer or file to print the current report.

   Properties – Click the **Properties** button to define properties for the printer. Refer to your Windows documentation for more information on printer properties and additional fields in this section.
4. Confirm the paper size and source in the Size and Source fields.
5. Select either the **Portrait** or **Landscape** radio button from the **Orientation** section.
6. Click **OK** to print the report, or **Cancel** to exit the Print Setup window without printing the report.

Chapter 5: Contact Center

This chapter includes:

About Contact Center

The Contact Center module includes seven features that allow you to input account, contact, task, address, and note or history information, maintain a calendar of events, and navigate the Internet. All of the features in the Contact Center are integrated with each other and other applicable features within CRM, VISUAL, VISUAL Financials, Microsoft Outlook 2007 and 2010, and Microsoft Word 2007 and 2010.

Using the CRM Today Feature

CRM Today is a default HTML (Hyper Text Mark-up Language) document that is accessed automatically when you open CRM. CRM Today acts as a bulletin board to provide important company information to employees. The CRM Today URL can be your company's website, a corporate intranet, or a specific document that resides on a server.

Design your document to your preferences, then add the URL to the system default. See "Using the Defaults Feature" on page 13-3.

CRM Today also contains security settings which can allow or prohibit certain users from viewing or accessing information within this window, such as the CRM Today feature, or any of the internet toolbar buttons (**Address**, **Home**, **Refresh**, **Stop** and **Go**). See "Using the Security Feature" on page 13-22.

Please refer to a general web design manual for specific instructions on web design.

Accessing CRM Today

If necessary, expand the Contact Center module in the navigation bar by clicking the **+** button, then click the **CRM Today** button.

Add links to your page to access the internet without leaving CRM. All Internet pages appear in the same window as the example above.

Navigating in CRM Today

When you open CRM Today, a web toolbar appears, allowing authorized users to access and navigate the internet, or a static page that resides on your local machine or server.

Refer to the following button definitions when using the internet.

Back – Click the **Back** toolbar button to return to the previous web page.

Forward – Applicable only if you have returned to a previous page. Click the **Forward** toolbar button to view the next page.

Stop – Click the **Stop** toolbar button to stop the present action, such as loading a new page.

Home – Click the **Home** toolbar button to return to the default page. This is the page entered in the URL for CRM Today field in the Defaults feature.

Refresh – Click the **Refresh** toolbar button to reload the current page.

Address – The URL (Universal Resource Locator). Specify a URL in the field provided and click the **Go** button to load the specified page.

Go - Click the **Go** toolbar button to launch the URL site indicated in the Address field.

Using the Accounts Feature

Use the Accounts feature to manage data for anyone with whom you have business relationship.

You can create and maintain customer accounts, flag accounts for follow-up, and integrate selected accounts with VISUAL from the Accounts feature in CRM. You also have the option to attach documents to a selected contact within an account and create a mail merge using the account information in the Accounts grid. See “Using Mail Merge” on page 4-8.

The Accounts feature contains two sub-features: **My Accounts** and **Follow-up Items**. The **Accounts**, **My Accounts**, and **My Follow-up Items** features open the same window, but filter data differently. The Accounts grid includes all accounts entered in CRM. The My Accounts grid lists only the accounts you enter. The Follow-up Items grid lists accounts you entered that have been flagged for follow-up.

Accessing the Accounts Grids

If necessary, expand the **Contact Center** module by clicking the **+** sign (beside the Contact Center) in the navigation bar, or double-click the module.

Click **Accounts**, or expand the Account feature by clicking the **+** button, then click the **My Accounts** button.

The Accounts grid lists basic information about each account. You can change the way you view information in this grid by using the filter options and customizing columns. See “CRM Grids” on page 3-22.

To view the account detail or edit an account, see “Editing Accounts” on page 5-17. To create a new account, see “Adding Accounts” on page 5-5.

To send a document to one or more accounts, see “Attaching a Document to an Account” on page 5-23.

Accounts can be displayed more than once if either of these check boxes are selected in the Defaults window:

- Allow fields from V_ACCT_ENTITY table to grid check box

  If you use multiple entities, each account-entity pairing is displayed in the Accounts grid.
- Allow fields from V_ACCT_SITE table to grid check box

  If you use multiple sites, each account-site pairing is displayed in the Accounts grid.

  See “Entering Information in the Account Tab” on page 13-5.

The Option bar at the top of the Accounts grid allows you to create and maintain records associated with the selected account. The Accounts Option bar includes **History, Tasks, Appointments, Contacts**, **Org Chart, Documents**, **Addresses, Opportunities,** and under More are **Quotes, Quote Line Items, Estimates, Estimate Line Items, Events**, **Event Attendees**, **Orders, Order Line Items**, **Calls**, **Issues**, **Contracts, Service Orders, Receivables**, **Receivable Line Items**, **Shipments**, **Shipment Line Items**, **RMAs**, **RMA Line Items**, and any applications you add to the feature from the Application Builder.

Two of the option buttons on the Option bar, **Addresses** and **Contacts**, function differently than the rest of the options. For information on these options, refer to “Using the Option Bar” on page 5–18. For all other option buttons, refer to "Using the Option Bar" on page 3–39.

Multiple Entities and Multiple Sites

If you use multiple entities, each entity can have separate credit arrangements with the account. Use the Accounting tab to set up credit information on an entity-by-entity basis.

If you use multiple sites, each site can have separate order management arrangements with the account. Use the Order Mgt tab to set up order management information on a site-by-site basis.

Adding Accounts

1. Click the **New** toolbar button, or right-click in the Account grid and select **New Record** from the menu.
2. Specify this information in the New Account window.

   Account ID – A unique, system generated number that identifies the account. When creating a new account you can use the Account ID auto-generated by CRM or modify the Account ID to suit your business needs. If the Account ID already exists a message dialog notifies you and the Account ID field is refreshed with the auto-generated Account ID.

   Account Type – The Account Type field allows you to categorize your accounts. Click the down arrow to choose an account type. The account type is user-defined.

   Create account types in the General Code Maintenance window. See “Maintaining General Maintenance” on page 2-5.

   Lead – Select this check box if this account is a lead. You can only select this check box if the account is not linked to a VISUAL customer. Clear the check box if you do not want to designate the account as a lead.

   Specifications – Click the **Specifications** button to specify specifications for the selected account. See “Maintaining Specifications” on page 4-21.
3. To complete the account record, specify information on each tab.

Entering Information in the Account Tab

The Account tab lists address information and additional comments for the selected account.

1. Click the **Account** tab.
2. In the Sold To section, specify the **Name**, **Address**, **City**, **St**, **Zip**, and **Country** in the fields provided.

3 If the Sold To section is the same as the Bill To section, you do not have to specify a Bill To address.

If the Bill To address is different than the Sold To address, specify the **Name**, **Address**, **City**, **St**, **Zip**, and **Country** in the fields provided, or click the **Browse** button to choose a Bill To address for the selected account.

Note: Address information you specify in the Sold To and Bill To fields is not saved in the account addresses. To add address records, click the **Addresses** button on the option bar, or click the **Addresses** button in the navigation bar. See "Using the Addresses Feature" on page 5–52..

4 Specify additional information in the Comments field. This field can contain an unlimited number of characters.

5 Click **Save**.

Entering Information in the General Tab

Use the General tab to categorize your account based on different information such as territory, branch, business unit, industry code, discount code, market, etc.

1 Click the **General** tab.

2 Specify this information:

Division/Business Unit/Branch – Click the **Division/Business Unit/Branch** drop-down list to choose from a list of Divisions, Business Units, and Branches. These fields allow you to categorize your accounts.

Create divisions, business units, or branches in General Maintenance. see “Maintaining General Maintenance” on page 2-5.

County – The county where the company is located. Click the down arrow to choose from a list of counties.

Open – The current date is inserted. You can change this date.

Modified – Indicates the last time you modified the account.

Cust ID – You cannot edit this field. If the account is shared with VISUAL, the VISUAL Customer Account ID number is displayed in this field.

Industrial Code – Click the browse button to choose from a list of industry codes.

Industry codes classify companies based on their field of business. Industry codes integrate with CRM and VISUAL so when you specify an industry code in one program, that code automatically populates the fields in the other program. Industry codes are defined in VISUAL.

ACK Code – Click the drop-down arrow to select an ACK code from the VMDI_ACK_CODES table.

Discount Code – Click the down arrow to apply existing user-defined discounts to the account.

Discount codes allow you to assign preset discount percentages to each account. Add discount codes in VISUAL Manufacturing. Discount Codes integrate with CRM and VISUAL, so the information you specify here also is displayed in VISUAL Manufacturing for the selected account, assuming the account is shared.

Label ID – Click the **Label ID** browse button to choose the label you want to print for the pack list.

Territory – The sales territory where the company is located. Click the **Territory** browse button to choose from a list of territories. Add territories in VISUAL.

Market – Click the Market drop-down list to select the customer’s market designation.

Priority – Indicates the importance of the record or call, such as high, medium, or low. The Priority fields appear in the General tab of the Service Order window, and the Issue tab in the Call Issue window. The Priority field in the Task tab on the Task window is system-defined and does not reflect the options available in the General Code Maintenance window.

Inactive – The **Inactive** check box allows the user to identify those accounts that are no longer active.

You can add the **Inactive** check box to the grid, then use filtering options to eliminate all inactive accounts from the grid to reduce grid size and errors in applying actions, such as the mail merge, to inactive accounts.

3 Click **Save**.

Entering Information in the Contact Tab

Use the Contact tab to specify the primary contact for the account.

If this account has more than one contact, you can attach alternate contacts to the account. See “Accessing the Contacts Option,” on page 5–21.

To define the primary contact:

1 Click the **Contact** tab.

2 Click the **Primary Contact** browse button and select the primary contact for this account. If the contact you want to attach to this account does not exist in your database, create the contact. See “Adding Contacts” on page 5-26. For information on adding contacts with the contact wizard, see “Using the New Contact Wizard” on page 4-12. If you choose to create your new contact using the Contacts Wizard, select the **New Contact(s) for Existing Account** option. After creating the contact, continue with step 3.

3 Specify this information:

Acct Phone – Specify the account’s business phone number.

Alt Phone – Specify the account’s alternate phone number.

Acct. Fax – Specify the account’s fax number.

Web User ID – If this account holder requires a Web User ID to log onto your website, specify the Web User ID.

Change Web Password – Click the **Change Web Password** button to update or create password information for the account.

Specify the new password in the New Password field, then retype the new password in the Confirm Password field.

Click **OK** to save your new password, or **Cancel** to exit the dialog without saving changes.

4 In the Account Rating area, assign an account rating. Choose one of the four ratings (**None**, or **One Star** through **Four Stars**). The rating system is not predetermined. You can choose what each rating means. Specify any relevant information about the rating in the Rating Comment field.

Note: You can add the Rating column to your grid to show the number of stars an account has received. If you add the Rating column to the Accounts grid, you can edit the rating from the grid by clicking the cell, then clicking the drop-down list and selecting **0**, **1**, **2**, **3**, or **4** stars.

5 Click **Save**.

Entering Information in the Accounting Tab

Use the Accounting tab to specify payment, tax, and credit information.

1 Click the **Accounting** tab.

2 Click the Terms ID button to select discount and net terms to the selected account. Create terms in the Terms Maintenance dialog in VISUAL's Application Global Maintenance. If you use VISUAL Financials Global Edition, create terms in VISUAL Financials Global Edition Terms Rule Maintenance.

3 Specify this information:

Default A/R Acct ID – Click the browse button to choose from a user-defined list of general ledger account IDs.

Tax Grp ID – Click the browse button to choose from a user-defined list of Tax Group IDs.

Create Tax Group IDs in VISUAL.

Tax ID # – Customer Tax ID number. Specify the Tax ID number supplied by the customer. This is not a required entry.

Account is Tax Exempt – Select this box if the customer is exempt from paying taxes.

RMA Required for Return – Select the check box if you require the customer to have a Return Material Authorization (RMA) before returning materials.

Compute Tax on Wholesale Price – Select this check box if you want the tax calculated based on the wholesale price of the product(s) ordered instead of the retail price for the customer.

Print Dunning Letters When Appropriate – Select the check box if the letter demanding payment is to be printed after the expiration of the receiving age limit.

Currency – Click the **Currency** drop-down list to choose the type of currency the account uses. This field is required.

Maintain currencies in VISUAL.

Trans Currency – Click the **Trans Currency** drop-down list to choose the type of currency the account uses for transactions.

Maintain transaction currencies in VISUAL.

Call Billing ID – If you intend to bill this account for calls, click the drop-down button and select the Call Billing ID you would like to apply to the account. Set up Call Billing IDs in General Code Maintenance. For more information on General Code Maintenance, refer to “Maintaining General Codes” on page 2–5.

4 Define the credit arrangements your entities have with this account. In the Entity ID field, click the drop-down arrow and select the entity to use. Then, specify this information:

Credit Limit – Specify the amount of credit to extend to this account. The limit is expressed in the selected entity’s entity currency.

If you specify an order for this account and the credit limit is exceeded, a warning message is displayed.

Recv. Age Limit – Specify the number of days after which you will no longer allow orders to be taken without a payment from the account. When the Age Limit is exceeded, a message is displayed indicating that the new order exceeds the limit.

Credit Status – Click the arrow and select a status for this account. You can select:

OK – You can specify orders without restrictions for this account.

On Hold – You cannot specify orders for this customer or make shipments to this account.

Orders on Hold – This account cannot place orders.

Shipments on Hold – You cannot send shipments to this account.

Credit Limit Control – Specify whether users can save orders for accounts who have exceeded the credit limit. You can assign a default to the Credit Limit Control field in **Admin > Defaults** on the Account tab. Click the arrow and select one of these options:

Override Allowed – Select this option to allow users to save orders for accounts who have exceeded their credit limit. A dialog is displayed to warn users that the credit limit has been exceeded, but users can still save orders.

No Override – Select his option to prevent users from saving orders for accounts who have exceeded their credit limit. A dialog is displayed informing users that the account has exceeded the credit limit.

5 Click **Save**.

Entering Information in the Sales Rep Tab

The Sales Rep tab lists sales representatives that are allowed to book orders on this account. You can choose a default sales rep as well as an unlimited number of alternate sales representatives.

If you use Infor VISUAL 10.0.0 or higher, the sales rep look ups are filtered to show active sales reps only.

1 Click the **Sales Rep** tab.

2 Click the browse button beside Default Sales Rep to choose a primary sales representative from the list.

The Default Sales Rep field will automatically populate the sales rep fields when entering new opportunities, quotes, orders in VISUAL, and contracts.

Create Sales Reps in **Tools > Maintain > Sales Reps**. See "Maintaining Sales Reps" on page 2-8.

3 Click the browse button beside the Account Manager field to choose an account manager for the account.

4 Click the column under **Rep ID** to specify an alternate sales rep.

Enter alternate sales reps if you want to be able to select other sales reps when entering new opportunities, quotes, order, and contracts for this account.

5 Click the **Rep ID** button to choose from a list of sales reps. You cannot type a new Sales Rep in these fields.

The Name is automatically populated in the table after you click **OK** on the Sales Representative Selection dialog.

6 Enter the role or responsibilities the sales rep has in relation to this account in the appropriate cell under the **Role** column.

7 Click **Save**.

Entering Information in the Profile Tab

Use the Profile tab to specify information for marketing purposes such as SIC codes, and general customer information.

1 Click the **Profile** tab.

2 Enter the following information in the Profile tab.

Parent Account – If the selected account has a parent account, click the **browse** button to choose a parent account from the list.

If you choose a parent account, click the additional **View Detail** button to view parent account detail in the bottom pane. You must select the **Save** toolbar button before viewing the account detail window.

Refer to the following field definitions and instructions to specify information in the Profile tab.

URL – Specify the URL address for the account, if applicable.

After the account URL has been entered, click the **Web** button to access the website.

Description – Specify a user-defined general description for the account.

Bus. Type – Specify the type of business of the account.

Plant SQFT – Specify the square footage of the account's plant.

# of Employees – Specify the number of employees for the account.

Year Established – Specify the year the account was established.

Account Owner – Click the Account Owner browse button and select the ID for the owner of this account.

Products – Specify the products the company manufactures in the Products text box.

Annual Sales – Click the down arrow to select the account's annual sales. You can apply user-defined entries to this field by selecting **Tools > Maintain > General Codes** from the main menu. See "Maintaining General Maintenance" on page 2-5.

Specify up to four SIC (Standard Industrial Classification) codes in the four fields of the **SIC Codes** section. SIC codes classify various companies by the products they produce. Click the **browse** button beside each field to choose a primary **SIC** code for the associated field.

SIC codes are integrated with CRM and VISUAL so when you specify an SIC code in one program, that code automatically enters in the other program. SIC codes are defined in the VISUAL module.

3 Click **Save**.

Entering Information in the User Tab

The User tab contains user-defined fields that relate to CRM. Use this tab to create additional information that is not already included in CRM.

Create user-defined fields in the **Admin > User Defined Fields** feature. See "Using the User Defined Fields Feature" on page 13-38.

You can add your user defined fields to the Accounts grid to sort and/or filter records by user defined fields, and print reports that contain user defined information.

Click the **User** tab.

Specify the necessary information, and then click **Save**.

Entering Information in the Back Office Tab

The Back Office tab contains user-defined fields that integrate with VISUAL. Create field labels in CRM in the **Admin > Defaults** feature. See "Using the Defaults Feature" on page 13-3.

Information you specify in the user defined fields is automatically updated in VISUAL, and information you specify in the user-defined fields of VISUAL is automatically updated in CRM.

In VISUAL, user-defined fields are located in the Customer Maintenance window on the User Defined tab.

Keep in mind that the field labels are not integrated and must be manually entered in each software program. Ensure the field labels are appropriately named based on the data entered in the fields.

1 Click the **Back Office** tab.

2 After you specify the necessary information, click the **Save** toolbar button.

3 To return to the Accounts/My Accounts grid, click the **Toggle** button, or click on the appropriate button on the navigation bar.

Entering Information in the Shipping Tab

The Shipping tab includes information for shipping purposes such as carrier details, requirements for partial shipments, and requirements for early orders.

1 Click the **Shipping** tab.

2 Enter the following information in the Shipping tab.

Carrier ID – Select the type of carrier for this account by clicking the **Carrier ID** drop-down list and selecting an existing Carrier ID from the list. Add Carrier IDs in VISUAL. Carrier IDs integrate with CRM and VISUAL, so the information you specify here also is displayed in VISUAL Manufacturing for the selected account, assuming the account is shared with VISUAL.

Ship To ID – Click the **Browse** button beside the Ship To ID field to select the ID associated with the customer's Ship To address.

Ship VIA – Select who will ship merchandise for this account by clicking on the **Ship Via** drop-down list and selecting an existing shipping name from the list. Carrier IDs are defined in VISUAL. Carrier IDs integrate with CRM and VISUAL Manufacturing, so the information you specify here also is displayed in VISUAL for the selected account, assuming the account is shared with VISUAL.

Free on Board – Click the **Free On Board** drop-down list to choose from a list of Free on Board codes.

Free on Board codes determine at what point in the shipping process the customer must take responsibility for shipping fees for the goods your company is shipping. Add Free on Board codes in VISUAL. Free on Board codes are integrated with CRM and VISUAL, so the information you specify here also is displayed in VISUAL for the selected account, assuming the account is shared with VISUAL.

Account Accepts Partial Shipments – Select the check box if the account can accept partial shipments from you. If the box is cleared, shipments cannot be sent or received unless the order is complete for the account.

You can set this check box to default to checked or unchecked for all new accounts by selecting **Admin > Defaults** in the Front Office Explorer pane, then selecting the Account tab. See "Using the Defaults Feature" on page 13-3.

Accepts Early Orders __ Days Early – Select the check box if the account accepts orders prior to the due date. Specify the number of days prior to the due date that the account will accept an order.

You can set this check box to default to checked or unchecked for all new accounts by selecting **Admin > Defaults** in the navigation bar, then selecting the Account tab.

Custom Docs - select preference for printing customs documentation.

Do Not Print - Select if you do not want to print customs documentation for this customer.

Print by Packlist - Select to print customs documents for this customer by packlist. Only consolidated packlists are eligible for printing as customs documents.

Print by Bill of Lading -Select to print customs documents for this customer by bill of lading.

3 Click **Save**.

Entering Information in the Order Management Tab

Use the Order Management tab to specify information such as carrier details, requirements for partial shipments, and requirements for early orders. If you use multiple sites, specify the information on this tab for each of your sites.

1 Click the **Ordr Mgt** tab.

2 In the Site ID field, click the arrow and select the site for which you are defining information. Then, specify this information:

Primary Warehouse – Click the **Primary Warehouse** button to select a primary default warehouse for this account and site. This becomes the default shipping warehouse when this site ships an item to this account. When you define warehouses in VISUAL Manufacturing, you must associate the warehouse with a Site ID. Only the warehouses associated with the site you selected in the Site ID field are displayed.

Customer Type – Click the **Customer Type** button beside the Customer Type field to select the ID associated with the customer type.

Priority Code – Click the Priority Code button to select a priority code. The Order Fill Rate field fills with the fill rate associated with the priority code.

Order Fill Rate – Specify an Order Fill Rate for the customer. An Order Fill Rate is a number between 0 and 100 that indicates the minimum percentage of the Quantity Ordered the customer will accept. For example, an order fill rate of 100 for a customer order line for 1,000 parts, indicates that the full order quantity must be allocated before the customer will accept the order; an order fill rate of 80 for a C/O line of 1,000, indicates that 80% of the Order Quantity must be allocated before the customer will accept the order. Minimum Fill Rates for C/O lines appear in the Customer Order Entry line item table in the Min Fill Rates column.

Fill Rate Type – From the Fill Rate Type list box, select one of the following Fill Rate types:

Line Level – When the unavailable inventory for a part on an order line item reaches the fill rate threshold, the line item is canceled.

Whole Order – When unavailable inventory for a part on an order line item reaches the fill rate threshold, the whole order is canceled.

Allocation Fence – Specify the number of days within which an order from a customer of this type the Allocation Utility considers. If an order's desired ship date is outside the allocation fence, the Allocation Utility ignores it during allocation.

C/O Alloc Level – This field allows you to allocate supply to a customer order using a partial, full or no allocation. Refer to the following options for more information.

None – Select this option if you do not want supplies allocated for customer orders.

Partial – This selection allows you to allocate supply to the order, but makes the allocation optional.

Full – This selection requires you to make sure that each customer order has allocated supply before accepting the order.

3 To complete the information on the Order Mgt tab, specify information in these fields. These fields are not site-specific. The information you specify in these fields applies to all fields.

Alt. Warehouse – Click the **Alt. Warehouse** browse button beside the Alt. Warehouse field to select an alternate warehouse for this account. This becomes the default shipping warehouse for this account.

Disbursement Fill Rate – The Disbursement fill rate, a value called “Fill Rate” in the Priority Code line item table, also is displayed in the Disbursement fill rate field. This value specifies how much of the available quantity in a warehouse is available to the customer at the time of order fulfillment. For example, if a customer fill rate is 100, the customer is allowed access to 100% of the available stock; if the customer fill rate is 70, the customer is allowed access to 70% of available stock. This rate is used when Quantity Available to Customer is figured in the Order Management Window, Entering Customer Order Fill Rates.

Reallocate – Before creating new allocations, existing allocations may be removed. Select the **Reallocate** check box if you want the Allocation Utility to remove and recalculate allocations for this customer.

Consolidate Orders – Consolidation is the process of combining license-plated (or otherwise uniquely identified) inventory into a single container. Partial pallets may be consolidated, broken cases may be consolidated. Generally, this means combining of things that have common characteristics, such as pallets of the same product. Select the **Consolidate Orders** box if you want to allow order consolidation.

Compliance Labeling – Compliance Labeling is the process of labeling outbound cartons or pallets in the warehouse (moveable units) with a bar-coded label specific to a customer requirement. In the warehouse, there may be many differing label requirements. Select the **Compliance Labeling** box if you require that the ship-to address have compliance labeling.

Auto Allocate – Select this check box to activate customer auto allocation globally. When using the Allocation Utilities to allocate supply to customer orders, there is a check to see if Auto Allocation is activated and then what level is selected.

When you select this check box, the C/O Allocation level section becomes active. Select a level of auto allocation, either **None**, **Full** or **Partial**.

4 Click the **Save** toolbar button.

Entering Information in the E-Commerce Tab

The E-Commerce tab includes information for E-Commerce purposes such as EDI and discount requirements.

1 Click the **E-Commerce** tab.

2 Enter the following information in the E-Commerce tab.

EDI Tracking Partner – Select this check box, if the customer is an EDI tracking partner.

Take Discounts Even if Over Due by _ Days – If the customer accepts discounts even if an order is over due by a certain number of days, select this check box and specify the number of days overdue that is acceptable.

Intermediate Consignee - Specify the name of the intermediate consignee. The intermediate consignee is the person or group to whom you are entrusting the goods when they are in transit to the customer.

Pool Code - Specify the code for the pooling area.

Generate ASN (856) - Select this check box if you want to generate an ASN (Advanced Shipping Notice) document that provides the receiver with advance data on incoming shipments. The ASN (856) standard format displays the contents of a shipment of goods and any additional shipment information, and is usually transmitted when the shipment is ready to be transported.

Hold Transfers of ASN's - Select this check box if you do not want to immediately transfer ASNs.

Accept 830 - Select this check box to accept X.12 document format 830 for importing Customer Forecasts.

Accept 862 - Select this check box to accept X.12 document format 862 for importing Customer Orders directly from the current Customer.

Consolidate Ship Lines - Select this check box if you want to allow consolidation of multiple shipping lines to a single line.

3 Click **Save**.

Entering Information in the Lang Forms Tab

The Lang Forms tab allows you to select language requirements for issuing documentation for international customer orders. For example, a situation may call for you to produce an order acknowledgment in German, a packlist in French, and an invoice in Italian. Use the Languages tab to set default Sold To and Bill To Language IDs for customers. Only use these IDs if a customer in an international customer. If a customer is a domestic trading partner, there is no need to specify this information.

1 Click the **Lang Forms** tab.

2 Click the **Language ID (Sold To)** button or drop-down arrow to select from a list of valid Language IDs. If no Language IDs appear in the Languages dialog or drop-down box, you have not added any Language IDs to the database. This is the Language ID you want to Partner with the customer's main address.

3 Click the **Language ID (Bill To)** button or drop-down arrow to select from a list of valid Language IDs. If no Language IDs appear in the Languages dialog or drop-down box, you have not added any Language IDs to the database. This is the Language ID you want to Partner with the customer's billing address.

4 Click the **Save** toolbar button.

Entering Information on the VAT Tab

You must enable VAT in VISUAL for the VAT tab to appear in the accounts window.

Note: If you have enabled VAT in VE, the use of Sales Tax IDs is disabled: ALL existing Sales Tax IDs in your database are disabled. If you want to use Sales Tax IDs, you must clear the **Value Added Tax Support Enabled** check box in the Application Global Maintenance window of VISUAL.

When you are using VAT, VAT information is populated on your quotes, orders, and invoices.

Use the VAT tab to specify Value Added Tax information for this account.

To access account VAT information, click on the VAT tab.

Enter the following information in the VAT tab:

VAT Registration – Specify the VAT Registration Number of your customer.

VAT Code – Click the VAT Code button and select the VAT code you want to use.

Invoice VAT Book Code – Click the drop-down arrow and select an Invoice VAT Book code.

Memo VAT Book Code – Click the drop-down arrow and select a Memo VAT Book code.

VAT Books control the numbering sequence of all invoices and memos created when VAT is enabled. In the European Community, there may be more than one “VAT book” or numbering sequence in use at any one time. With VAT enabled, more than one automatic number sequence is permitted to exist for invoices and memos. For more information on VAT Books, refer to the “Setting Up VAT Books” section of the VISUAL User’s Guide.

Select the following options that apply to this account:

Account is VAT Exempt – Select this check box if your customer is exempt from VAT.

VAT is Discounted if Within Terms – If you are discounting the VAT amount when your customer pays within the specified terms, select the **VAT is Discounted if Within Terms** check box.

VAT is Always Discounted – If you are discounting the VAT regardless of when you customer pays the bill, select the **VAT is Always Discounted** check box.

Customer VAT Code Overrides Part VAT – If you have specified a VAT for the part and it differs from the VAT you specify for the customer and you want the customer VAT to override the Part VAT, select the **Customer VAT Code Overrides Part VAT** check box.

When you have finished setting up the VAT information for this account, click the **Save** toolbar button.

Entering Information on the Intrastat Tab

To access account Intrastat information, click on the Intrastat tab.

Specify this information:

Port of Arrival – Select the port at which this customer usually receives its goods.

Port of Transshipment – Select the port of transshipment for this customer. A port of transshipment is the location from which goods are shipped.

Country ID – Select the customer's Country ID.

Nature of Transaction – Select the nature of transaction for this customer.

Nature of Return Transaction – Select the nature of return transaction for this customer. By default, this transaction code is used for a return transaction.

Mode of Transport – Select the method by which goods are delivered to the customer's port of arrival.

Siret Number – Specify the customer's siret number. A siret number is a French company ID number.

Editing Accounts

After an account record has been saved, you cannot edit the Site ID. You can edit other information for the account.

1 With the appropriate account selected in the Accounts grid, click the **Toggle** button at the upper left side of the grid. You can also double-click the selected account.

Refer to the field definitions and instructions in "Adding Accounts" on page 5–5.

2 Click the **Save** toolbar button after you are finished editing.

3 To return to the Accounts/My Accounts grid, click the **Toggle** button, or click the appropriate button on the navigation bar.

Deleting/Undeleting Accounts

1 With the appropriate account selected in the Accounts grid, click the **Delete** toolbar button, or select **Edit > Delete Record(s)** from the main menu.

You can also right-click your mouse and select **Delete Record(s)** from the menu.

If you set CRM to prompt you when deleting records, a Record Deletion dialog is displayed.

2 Click **Yes** to delete the account, or **No** to cancel the deletion.

3 With the deleted record selected, you can undelete the record (as long as you have not saved the deleted record) by clicking the **Delete** toolbar button again, or select **Edit > Undelete Record(s)** from the main menu.

4 To permanently save your changes, click the **Save** toolbar button, or click **Yes** when exiting the grid.

Flagging Accounts

Flag an account to remind yourself of follow-up items. The flag is displayed next to the account in the Accounts grid.

1 With the appropriate account selected, click the **Flag** toolbar button, or right-click your mouse and select **Flag for Follow-up** from the menu.

2 Click the down arrow beside the Flag To field to choose the type of follow-up for this account. Select from **Follow-up**, **Call**, **Arrange Meeting**, **E-mail**, or **Send Letter**.

3 Click the down arrow beside the Due By field to choose a date by which the follow-up must occur, or specify the date in Windows format. If you do not want to specify a date, click the down arrow, then click the **None** button.

4 Select the **Completed** check box when the follow-up is complete. Flags in the Accounts window appear red when open, and gray when closed.

5 To take a follow-up flag off an account, click the **Clear Flag** button.

6 After all information is entered, click **OK** to save changes, or **Cancel** to return to the previous grid without saving changes.

Using the Option Bar

The Option bar at the top of the Accounts grid allows you to create and maintain additional information associated with the selected account. The Accounts Option bar includes: **History**, **Tasks**, **Appointments**, **Contacts, Org Chart, Documents**, **Addresses, Opportunities**, **Quotes**, **Quotes Line Items, Estimates, Estimate Line Items, Events, Event Attendees, Orders, Order Line Items, Calls, Issues, Service Orders, Receivables, Receivable Line Items, Shipments, Shipment Line Items, RMA's, RMA Line Items,** and any other options you choose from the Application Builder module. See “Using the Option Bar” on page 3-39.

Discussed in this section are options uniquely connected with the Accounts feature: Addresses, Contacts, and Org Chart. The Addresses option lists additional shipping addresses for the selected account, and the Org Chart under the Contacts option creates organizational charts of personnel who are associated with the selected account.

Adding Account Addresses

With the appropriate account selected in the Accounts grid, click the **Addresses** option button on the Accounts option bar.

The Addresses For pane lists additional shipping addresses for the selected account.

Refer to the following information in the Addresses For pane.

Acct Name – The name of the account holder. You can click the account name to view account details in the bottom pane.

Addr 1/ Addr 2 – The shipping address of the selected account from the information entered in the Address details window.

Acct City/St/Acct Zip – The city, state, and zip code of the account holder. You can click the account name to view account details in the bottom pane.

City/State/Zip code – The city, state, and zip code information from the Address details window.

Last User – This field is populated with the user name of the person who last edited and saved the address.

Territory – The territory of the account. This field is populated using the information from the Address detail window on the Details tab.

Ship Via – The method of shipping used for this account. This field is populated using the information from the Address detail window on the Detail tab.

To add an address:

1 Make sure the Addresses For pane is active by clicking anywhere within the pane.

The active pane is identified by a dark blue coloring of the top bar (sometimes the option bar), while the bar in the inactive window is colored gray.

2 Click the **New** toolbar button, or right-click within the Addresses For pane and select **New Record** from the menu.

The New Address window replaces the Addresses For window in the bottom pane.

3 Refer to the following fields in the Address pane.

Address ID – You cannot edit this field. A system-assigned number that uniquely identifies the record.

Location – Specify the name of the location.

4 If necessary, click the **General** tab, then refer to the following information when adding an address. Some fields are automatically populated using the entries made in the Account detail window for the selected account.

Account – Click the **Account** button to select an account for the address.

Note: You can add an address to any account, whether it is selected or not. Since the address feature requires that you assign an account to the address, an account does not have to be selected to add an address.

Shipping Address – Specify the shipping address in the three fields provided.

City, St, Zip – Specify the city in the appropriate field. Click the down arrow to specify a state or specify the state in the appropriate field. Specify the zip code in the appropriate field.

Country – Specify the country where the address is located.

Comments – Specify any comments in the space provided.

Ship To ID – Displays the ID associated with the customer's Ship To address. You cannot edit this field.

Contact – Click the browse button to specify a contact for the shipping address.

If you entered a Contact ID, you can click the **View Detail** button to view the details of the contact.

5 Click the **Details** tab.

6 Refer to the following information when entering an address in the Details tab.

Territory – Click the down arrow to select a sales territory for the address.

County – Click the down arrow to select a county for the address.

Area – Click the down arrow to select the area where the address is located.

Sub-Area – Active when an area that contains sub areas is selected from the Area field. Click the down arrow to select a sub area for the address.

Owner – Click the Owner browse button and assign a user to the account.

Sales Rep – Click the down arrow to select a sales representative from the list. If you use Infor VISUAL 10.0.0 or higher, the list shows active sales reps only.

Discount Code – Click the down arrow to apply existing user-defined discounts to the account.

Discount codes allow you to assign preset discount percentages to each account. Add discount codes in *VISUAL.* Discount Codes integrate with CRM and VISUAL.

Tax Grp ID – Click the **Tax Grp ID** button to select a sales tax for the account from the list.

Tax ID# – Specify the Tax ID number for the account.

Carrier ID – Click the down arrow to select a carrier for shipments.

FOB – Click the down arrow to choose from a list of Free on Board codes.

Free on Board codes determine at what point in the shipping process the customer must take responsibility for shipping fees for the goods your company is shipping.

Ship Via – Select who will ship merchandise for this account by clicking on the down arrow, and selecting an existing shipping name from the list.

Lang ID – Specify the Language ID used for the account.

Tax Exempt – Select the **Tax Exempt** check box if the company is exempt from taxes.

Description – Specify a brief description, if necessary.

7 Click the **User** tab.

8 Enter any additional user-defined information in the User tab.

9 Click the **Save** toolbar button.

Editing Addresses

1 Make sure the Addresses For pane is active by clicking anywhere within the pane.

2 To view details of an address, select the address, then click the **Toggle** button.

The Address window replaces the Addresses For window in the bottom pane.

For field definitions, refer to "Maintaining Addresses " on page 5–52.

3 Click the **Save** toolbar button.

4 To return to the Addresses For pane, click the **Toggle** button.

Deleting and Undeleting Addresses

1 Make sure the Addresses For pane is active by clicking anywhere within the pane.

2 Select the address you want to delete by clicking the row header to the left of the row.

3 Click the **Delete** toolbar button, or right-click your mouse and select **Delete Record(s)** from the menu.

If you set your computer to prompt you when deleting records, a Record Deletion dialog is displayed.

4 Click **Yes** to delete the selected address, or **No** to cancel the deletion.

5 With the deleted record selected, you can undelete the record (as long as you have not saved the deleted record) by clicking the **Delete** toolbar button again, or select **Edit > Undelete Record(s)** from the main menu.

You can also right-click your mouse and select **Undelete Record(s)** from the menu.

6 To permanently save your changes, click the **Save** toolbar button, or click **Yes** when exiting the pane.

Accessing the Contacts Option

The Contacts option contains two options: Contacts and the Org Chart. The contacts option opens the Contacts For window in the lower pane and includes a list of all contacts associated with the selected account. The Org Chart option, discussed later in “Accessing the Org Chart Option,” opens an organizational chart of contacts that includes basic information for each contact.

To access the Contacts pane, select the account in the Accounts grid, then click the Contacts option button on the option bar.

The same contact window is accessed as the Contacts feature accessed from the navigation bar. You can add, delete, and edit contacts, as well as perform other functions like flagging a contact, and adding a contact to Microsoft Outlook.

To exit the Contacts For pane, click the Back toolbar button, or click the x button in the top right corner of the Contacts For pane.

Accessing the Org Chart Option

1 Select the account in the Accounts grid, then click the down arrow beside the Contacts option button on the option bar.

2 Click the Org Chart option from the option bar menu.

The Org Chart For pane lists personnel associated with the selected account in a tree chart. The Org Chart For pane produces the same information as the Contacts option, but in a tree chart format.

3 Make sure the Org Chart For pane is active by clicking anywhere within the pane.

4 To enlarge or reduce the size of the organization chart, click the 50%, 75%, or 100% boxes in the top right corner of the pane.

If you view the chart at 50% or 75%, the view of each contact is increased when you scroll over the contact with your mouse. This allows you to read the information on each card while maintaining an overall view of the chart.

5 You can click on any of the email addresses of contacts to open an email addressed to the specified contact.

6 To view contact details, double-click the box (anywhere except the email address) of the contact you want to view, or select the box and click the Toggle button.

The Contact window replaces the Org Chart For window in the bottom pane.

For more information on maintaining contacts, refer to “Adding Contacts” on page 5–26.

7 To return to the Org Chart For pane, click the **Toggle** button in the top left corner of the pane.

8 To exit the Addresses For pane, click the x in the top right corner of the pane.

Adding Contacts from the Org Chart

1 Make sure the Org Chart For pane is active by clicking anywhere within the pane.

2 Click the New toolbar button.

The New Contact window replaces the Org Chart For window in the bottom pane.

For more information on maintaining contacts, refer to “Adding Contacts” on page 5–26.

Accessing Follow-up Items

Follow-up items include all accounts in the My Accounts grid that have been flagged for follow-up.

Expand the Contact Center module by clicking the **+** button, if necessary.

Expand the Accounts feature by clicking the **+** button, then click the **My Follow-up Items** button to access Follow-up Items in the Accounts grid.

To view or edit account details, refer to “Adding Accounts”.

To make changes to your follow-up flag, refer to “Flagging Accounts”.

Converting Accounts to Customers

You can add CRM accounts to VISUAL by converting the CRM account to a customer.

When you create an account in CRM, certain information in the account is shared with VISUAL such as accounting details, shipping information, and contact information. However, the account is not available as a customer in the Customer Maintenance window of VISUAL.

When you convert an account to a customer, the account information is added to the customer tables in VISUAL. Converting an account to VISUAL automatically creates a duplicate record using the account information in CRM that applies to a customer in VISUAL. A “link” is then created in CRM between the two records so that information entered in either record is reflected in the other record.

You can use the CRM account ID as the VISUAL customer ID provided that the account ID is not already used as a customer ID. If the CRM account ID is already used as a customer ID in VISUAL, you are prompted to select a different ID.

1 With the appropriate account selected in the Accounts grid, choose **Actions, Convert Account to Customer** from the main menu. You can also right-click your mouse within the Account grid, and select **Convert Account to Customer** from the menu.

2 If you selected the **Prompt for ID when creating new VISUAL customer** check box on the System tab in Defaults maintenance, then a dialog is displayed. Specify the customer ID to use for this account. If you also selected the **Use Next Number Gen when creating new VISUAL customer** check box, then an ID based on the next number generation scheme set up in Customer Maintenance is inserted. You can specify a different ID.

3 Click **OK**.

4 Click **OK**.

The account is now integrated with customers in VISUAL. The customer ID for the account is displayed on the General tab.

Attaching a Document to an Account

Note: You must have the Marketing Module or the Enterprise version of CRM to attach a document to an account.

Use the Catalog feature to create tasks for employees to mail printed material to specified contacts within accounts. Each document you send is recorded in several places to help you track the customers who received literature. See “Using the Catalog Feature” on page 11-3. Review the types of documents to send a document to an account.

You can send a printed document that is not entered in the Catalog feature and a file of that document is automatically entered in the Catalog feature. This file, however, is not a full entry like the catalog items you specify in the Catalog feature.

You must specify document types in the Marketing Documents field in the Defaults feature in order to specify company materials in the Catalog feature. For more information on setting defaults, refer to “Maintaining Defaults” on page 13–3.

You may want to review the settings for the Attach Document function in the **Admin > Defaults** feature before proceeding. These settings can prevent large files from being sent, as well as provide defaults for specific fields.

Attaching a Printed Document to an Account

When you use the Send Document feature on an account, a task is created in CRM for an employee to mail the printed materials to contacts associated with an account.

1 From the Accounts grid, select the account(s) to which you want to send information.

2 Click the **Send Printed Document to Account(s)** toolbar button, or right-click on the selected account(s) and select **Send Printed Document to Account(s)**.

3 In the Attach Document Wizard dialog, click **Next** to continue.

You can click **Cancel** to cancel the wizard and return to the Accounts grid, or click **Back** to return to a previous dialog in the Attach Document Wizard.

4 Select the **Printed Document** radio button.

5 Click the browse button beside the Catalog ID field to choose the type of material you want to send.

The items in the Catalog ID list include all the printed catalog items you entered in the Catalog Items grid under the Catalog feature.

6 Click **Next**.

7 Select one of these radio buttons.

Send to Selection – Select the **Send to Selection** radio button if you want to send the document to the contacts associated with the accounts you selected in the Accounts grid.

Send to All – Select the **Send to All** radio button if you want to send the document to all the contacts associated with every account in the Accounts grid.

8 Click **Next** to continue.

The Assign To and Subject fields can be automatically populated by entering a default in **Admin > Defaults** on the **Document** tab. See “Entering Information in the Document Tab” on page 13-15.

9 Click the browse button beside the Assign To field to choose an employee to mail the material you specified.

This allows a task to be created for the specified employee in the Tasks grid.

10 Enter a brief description of the Task in the Subject field.

11 Click the down arrow beside the Due Date field to specify the date the task is due.

12 Enter any additional comments you want to include in the Comments text box.

The Document ID and the name of the printed material are automatically included.

13 Click **Finish**.

A task is created for the assigned employee in the Tasks grid, the document sent is recorded in the Documents option of the selected account in the Accounts grid, and the document sent is recorded in the Documents option of the selected contact(s) in the Contacts grid. All the contacts associated with that account contain a record of the document sent in the Tasks option.

Printing and Exporting Accounts

There are several options to print and export Account information in CRM. See these chapters for additional information:

- To print a report on all Account records in the Accounts grid, refer to "Printing All Records in a Grid" on page 4–22.
- To print preloaded and user-defined reports, refer to "Using the Reports Menu Option" on page 4–24.
- To export the Accounts grid or a specific record within the Accounts grid and save it in a specified format, refer to "Exporting Grid Contents" on page 3–25.

To print a report on a specific Account record, refer to "Printing a Specific Record" on page 4–22.

Using the Contacts Feature

The Contacts feature acts like an address book that can link to features in CRM such as accounts, tasks, and calls, or function independently.

Use the Contacts feature to create and maintain contacts. You can also attach a document to one or more contacts or perform a mail merge.

The **Contact** buttons open the same Contact grid, but filter data differently. The Contacts grid includes all contacts entered in the system. The **My Contacts** button opens a grid that lists only the contacts that you have permission for based on security settings. The **My Follow-up Items** button opens a grid that lists contacts you entered that have been flagged for follow-up. You can also add contacts to Microsoft Outlook.

Accessing the Contacts Grid

Expand the Contact Center module by clicking the **+** button in the navigation bar, or double-click the module, if necessary.

To view the Contacts grid, click the **Contacts** button.

To view My Contacts, click the **+** button beside the Contacts feature, then click the **My Contacts** button.

The Contacts grid lists basic information about each contact.

Notice that some contacts contain yellow icons in the second column (based on default column settings). These icons represent the primary contact for the account that is associated with the contact. CRM automatically identifies the first contact associated with an account as the primary contact. You can change the primary contact by accessing the account and changing the contact in the Primary Contact field on the **Contact** Tab.

You can change the way you view information on this grid by using filter options or customizing columns. See “CRM Grids” on page 3-22.

Contacts can be displayed more than once if the Include all available fields from the V_ACCOUNT table to Contacts grid check box is selected in the Defaults window. If a contact is attached to more than one account, then one line for each contact-account pairing is displayed. See “Entering Information in the Contact Tab” on page 13-7.

To view contact detail, or to create a new contact, see “Adding Contacts” or “Editing Contacts”.

To send a document to a contact, see “Attaching a Document to Contacts”.

Adding Contacts

Contacts that you add in CRM Contacts are accessible in the Contact Maintenance window in VISUAL Manufacturing. When you convert a CRM account to a customer, any contacts linked to the account are also linked to the VISUAL customer.

To add a contact:

1 Click the **New** button, or right-click in the Contact grid and select **New Record** from the menu.

2 Specify this information:

Contact ID – You cannot edit this field. A system-generated number that uniquely identifies each contact.

Name – Click the down arrow to choose the honorific of the contact. Choose from **Dr**, **Miss**, **Mr**, **Mrs**, and **Ms**. Then type the first name, middle initial, and last name of the contact in the name fields provided.

3 Click **Save**.

4 To add specifications for this contact, click the Specifications button on the toolbar. Specify the specification, then click **Save**. When you next access the contact record, the Specification icon on the record is active, indicating that a specification exists for the contact. Click the icon to view the specification and to add any other text. See “Maintaining Specifications” on page 4-21.

5 To complete the contact record, specify information in the tabs.

Entering Information in the General Tab

The General tab includes contact information such as phone numbers, email, and web related data.

1 Click the **General** tab.

2 Specify this information:

Bus. Phone – Specify the business phone number of the contact. When a business phone number is entered, you can click the **Bus Phone** button to automatically dial the number through your system’s modem, if applicable.

Note: *When you add a new contact to an existing account, the account’s phone number automatically is displayed in the Bus Phone field by default. Change the default settings for accounts if you do not want the account’s phone number to automatically appear in this field.* *See “Entering Information in the Account Tab” on page 13-5.*

Fax – Specify the fax number of the contact.

Home Phone – Specify the home phone number of the contact. When a home phone number is entered, you can click the **Home Phone** button to automatically dial the number through your system’s modem, if applicable.

Mobile Phone – Specify the mobile phone number of the contact. When a mobile phone number is entered, you can click the **Mobile Phone** button to automatically dial the number through your system’s modem, if applicable.

Other Phone – Specify an alternate phone number, if applicable. When a phone number is entered in this field, you can click the **Other Phone** button to automatically dial the number using your system’s modem.

VE Contact ID – The ID used for this contact in VISUAL Manufacturing is inserted. You cannot edit this field.

Reports To – Use this field to create an organization chart available from the options bar in the Accounts grid. Select the **Browse** button to choose a supervisor for the contact.

If you entered Report To information, click the additional **View Detail** button to view the detail of the Report To information in the bottom pane. You must select the **Save** toolbar button before viewing the account detail window.

Comments – Specify additional comments regarding the contact in the field provided.

Position – Specify the position held by the contact.

E-mail – Specify the email address of the contact in the field provided.

If you entered an email address in the E-mail field, click the **E-mail** button to automatically open an email message to the selected contact.

URL – If you have a website that requires contacts to sign on using a User ID and password, specify the URL address of the website in the field provided.

If you entered a URL address in the Web field, click the **Web** button to automatically launch your internet browser and view the specified webpage.

Web User ID – To allow the selected contact access to your website, specify a Web User ID. To set password information, or edit an existing password for the contact, click **Change Web Password**.

Change Web Password – Click the **Change Web Password** button to create or update password information for the contact.

Specify the new password in the New Password field, then retype the new password in the Confirm Password field.

Click **OK** to save your new password, or **Cancel** to exit the dialog without saving changes.

Sales Rep – Select the **Browse** button to choose a sales representative for the contact. If you use Infor VISUAL 10.0.0 or higher, the look up shows active sales reps only.

Inactive – Select the Inactive check box to identify those contacts that are not currently active.

You can add the **Inactive** check box to the grid, then use filtering options to eliminate all inactive accounts from the grid to reduce grid size and errors in applying actions, such as the mail merge, to inactive accounts.

3. Click the **Save** toolbar button.

Entering Information in the Address Tab

The Address tab includes a main and alternate address for the contact.

Note: The address(es) you specify in the Address tab are not part of the Addresses feature and will not be available in any address lookup fields.

1. Click the **Address** tab.
2. If the contact is associated with an existing address, click the **Name** button to choose an address location. The address information automatically is displayed when you select a location.

If the contact is not associated with an existing address, specify the address information in the fields provided.

Name – Specify the name of the contact.

Address – Specify the address of the contact.

City, St, Zip – Specify the city, state, and zip code of the contact.

Country – Specify the country where the contact is located.

3 If the contact is associated with an existing alternate address, click the browse button to choose a location for the contact. The address information will automatically specify once you have chosen an alternate location.

If the contact is not associated with an existing address, specify the additional address information, if applicable. For field definitions and instructions, refer to step 2.

4 Click the **Save** toolbar button.

Entering Information in the Profile Tab

Use the Profile tab to help you retain good customer relations by recording contact information such as “Do Not Contact” dates and methods, as well as a preferred method of contact.

1 Click the **Profile** tab.

2 In the Do Not area, specify this information:

Contact – If the contact does not want to be contacted at all on a specific day, click the **Contact** drop-down calendar to select the date to not contact this person/company.

Email – If the contact does not want to be contacted by email on a certain date, click the **Email** drop-down calendar to select the date not to email.

Phone – If the contact does not want to be contacted by phone on a certain date, click the **Phone** drop-down calendar to select the date not to call.

Mail – If the contact does not want to receive mail on a certain date, click the **Mail** drop-down calendar to select the date not to send mail.

Fax – If the contact does not want to be contacted by fax on a certain date, click the **Fax** drop-down calendar to select the date not to fax.

3 If the contact prefers a certain method of contact, click the **Preferred Contact Method** drop-down list to select the method you should reach the contact. This is a user-defined field. To create options for this field, select **Tools > Maintain > General Codes** from the main menu. See “Maintaining General Maintenance” on page 2-5.

4 Click the Owner browse button and select the user you want to associate with this contact.

5 Click the **Save** toolbar button, or select **File**, **Save** from the main menu.

Entering Information in the User Tab

This tab contains user-defined fields that allow you to add additional information to the Contacts Window. Field labels are created in the **Admin > User Defined Fields** feature in the navigation bar**.** You can add user-defined fields to the Contacts grid for viewing, and use sort and filter options to locate records easily. See “CRM Grids” on page 3-22.

If you created user-defined fields, specify the necessary information.

Editing Contacts

1 With the appropriate contact selected, click the **Toggle** button at the upper left side of the Contacts grid. You can also double-click the selected contact.

Refer to the field definitions and instructions in “Adding Contacts” in this section to edit the selected contact.

2 Click the **Save** toolbar button when you are finished editing the selected contact.

3 To return to the Contacts/My Contacts window, click the **Toggle** button, or click the **Contacts/My Contacts** button on the navigation bar.

Deleting/Undeleting Contacts

1 With the appropriate contact selected in the Contacts grid, click the **Delete** toolbar button, or select **Edit > Delete Record(s)** from the main menu.

Note: You can also right-click the contact and select **Delete Record(s)** from the menu.

If you set your computer to prompt you when deleting records, a Record Deletion dialog is displayed.

2 Click **Yes** to delete the contact, or **No** to cancel the deletion.

If the contact is deleted, the record is displayed in gray with a line through the text. This indicates the record has been deleted and is no longer accessible.

3 With the deleted record selected, you can undelete the record (as long as the record has not been saved) by clicking on the **Delete** toolbar button again, or select **Edit > Undelete Record[s]** from the main menu.

4 To permanently save your changes, click the **Save** toolbar button, or click **Yes** when exiting the grid.

Flagging Contacts

You are reminded to follow-up on a contact at a specified date, and helps you identify those records that have been flagged for follow-up by placing a red flag beside the contact in the Contacts grid.

1 With the contact selected, click the **Flag** toolbar button, or select **Actions > Flag for Follow-Up** from the main menu.

2 Click the down arrow beside the Flag To field to choose the type of follow-up for this contact. Select from **Follow-up**, **Call**, **Arrange Meeting**, **E-mail**, or **Send Letter**.

3 Click the down arrow beside the Due By field to choose a date to follow-up on this contact, or specify the date in Windows format.

   If you do not want CRM to automatically remind you of this follow-up on a certain date, click the **None** button.

4 After you complete the follow-up for a contact, select the **Completed** check box. The flag for the completed follow-up is displayed in gray on the Contacts grid.

5 To remove a follow-up flag from a contact, click the **Clear Flag** button.

6 Specify all your information and then click **OK** to save changes, or **Cancel** to return to the previous grid without saving changes.

Attaching a Contact to an Account

You can attach a contact to an existing account or a new account. You can link the same contact to multiple accounts.

1 In the Contacts grid, select the contact.

2 Click **Accounts**.

3 To link the contact to an existing account, click the **Attach Existing Account** button on the toolbar. In the Lookup dialog, select the existing account.

   To link the contact to a new account, click **New**. See “Using the Accounts Feature” for adding a new account.

4 To assign the contact as the primary contact for the account, select the account and then click **Set Primary Contact**. A contact can serve as the primary contact for multiple accounts, but each account can have only one primary contact. The primary contact symbol displays on the account line for that contact.

5 Click **Save**.

Detaching an Account from a Contact

If the contact is no longer associated with an account, you can detach the account from the contact. To detach an account:

1 In the Contacts grid, select the contact.

2 Click **Accounts**.

3 In the Accounts for Contact grid, select the account to remove.

4 Click the **Detach Account** toolbar button.

5 Click **Yes** in the dialog to remove the account from the contact. Click **No** to cancel the removal.

6 Click **Save**.

Sending Letters

Create letters to send to selected contacts in CRM using Microsoft Word. You can apply a user-defined template created in Merge Setup to selected contact information. Refer to the appropriate headings below for procedures.

CRM offers a default template for the Send Letter option, but you can assign one of your own user-defined templates as the default.

Before you can apply a template letter to a contact, you must first create the template in the Merge Setup function. See “Maintaining Merge Setup” on page 4-5.

Applying a Template to a Contact

1 With the contact selected, click the down arrow beside the Send Letter toolbar button, then select the template you want to apply to the selected contact.

   You can also right-click on the contact and select **Send Letter**, then select the template you want to apply from the menu.

   Microsoft Word opens with the contact information merged into the template you selected.

2 Click the **Save** toolbar button in Microsoft Word to save your letter.

3 Select **File > Exit** from the main menu to return to CRM.

Composing Email

With the contact(s) selected in the Contacts grid, click the **Compose an e-mail for the contact** toolbar button to open an email addressed to the contact(s) using Microsoft Outlook.

You can also right-click on the appropriate contact and select **New Message to Contact** from the menu.

The email address of the selected contact(s) is displayed in the To field using information from CRM.

Enter a subject in the Subject field, then specify the message in the text box below.

Click the **Send** button to send the document to the selected contact/s, or click the **Send to CRM** button to send the document to the selected contacts and record the email document in the History feature within CRM.

Refer to your Microsoft Outlook documentation for information on navigating in your email.

Adding Contacts to Outlook

You can add contacts created in CRM to Microsoft Outlook.

1 Select the appropriate contact(s) in the Contacts grid, then select **Actions > Sync Contact(s) to Outlook** from the main menu.

 You can also right-click on the appropriate contact(s) and select **Sync Contact(s) to Outlook** from the menu.

2 Click **Yes** to add all contacts in the Contacts grid, or click **No** to add the selected contact only.

 Click **Cancel** to return to the Contacts grid without adding a contact to Outlook.

 If you added a contact or contacts, click **OK**.

3 To access contacts in Microsoft Outlook, open Outlook.

4 On the Folder List, click the **+** button to the left of **Outlook Today – (Personal Folders)**, then click the **+** button to the left of **Contacts** to expand the information in the Contacts item.

 If your Folder List isn't open, click **View > Folder List** from the main menu.

5 Click **VFO Contacts**.

 The contacts you created in CRM appear in the VFO Contacts window in Outlook.

6 Click the buttons to the right of the window to view contacts whose last names begin with the letter selected.

 For more information on navigating in Outlook, refer to the Microsoft Outlook documentation, or the Help files on the main menu.

Accessing Follow-up Items

Follow-up items include all contacts in the My Contacts grid that have been flagged for follow-up.

1 Click the **+** button to expand the Contact Center module if necessary, then click the **+** button beside the **Contacts** feature.

2 Click the **My Follow-up Items** button.

3 To view or edit contact details, refer to "Adding Contacts" on page 5–26.

 To make changes to your follow-up flag, refer to "Flagging Contacts" on page 5–30.

Attaching a Document to Contacts

See "Sending a Document" on page 4-10.

Printing and Exporting Contacts

There are several options to print and export Contact information in CRM. See these chapters for additional information:

- To print a report on all Contact records in the Contacts grid, refer to "Printing All Records in a Grid" on page 4–22.
- To print a report on a specific Contact record, refer to "Printing a Specific Record" on page 4–22.
- To print preloaded and user-defined reports, refer to "Using the Reports Menu Option" on page 4–24.
- To export the Contacts grid or a specific record within the Contacts grid and save it in a specified format, refer to "Exporting Grid Contents" on page 3–25.

Using the Tasks Feature

Use the Tasks feature to create tasks related to these CRM record types: Account, Address, Calls, Catalog items, Competitor, Contract, Contract Item, Contract Type, Employee, Estimate, Event, Attendee, History entry, Opportunity, Order, Part, Quote, Service Order, Another Task, Sales Reps, App Builder Apps or for general reminders. If you use Infor VISUAL 8.0.0 or higher, you can also create tasks related to these VISUAL back office records: AP Cash Disbursements, AP Invoices, AR Cash Receipts, AR Invoices, Customers, Customer Orders, Packlists, Receivers, Services, RMAs, Service Dispatches, and Vendors. You can specify the account or the contact for whom you are completing the task.

Use the Tasks grid to create and maintain tasks, create pop-up reminders, add Tasks to Outlook, and attach items such as contacts or an application item to tasks.

The task buttons open the same Task grid, but filter data differently. The Tasks grid includes all tasks entered in the system. The My Tasks grid lists only the tasks you enter.

You also have the option to specify a Quick Task that is accessible from other grids within CRM. For more information on the Quick Task feature, refer to “Creating a Quick Task” on page 4–19. Quick Tasks are available by the main menu, or by using **CTRL** + **T** on your keyboard.

VISUAL Activities and CRM

This information applies only if you use Infor VISUAL 8.0.0 or higher.

CRM tasks and VISUAL activities are stored in the same database table. You can use the CRM Task grid or Task Maintenance to view and edit any activity created in VISUAL. You can also view and edit CRM Tasks in VISUAL Activity Maintenance.

CRM and VISUAL also share the Task/Activity Category and Task/Activity Type table. Any category or type you create in one application is available in the other application.

See the “Activities and Tasks” chapter in the *Infor VISUAL Concepts and Common Features Guide*.

Accessing the Tasks Grid

Click the **+** button or double-click the module to expand the Contact Center module if necessary, then click the **+** button to expand the Tasks feature.

Click the **Tasks** or **My Tasks** button.

The Tasks grid lists basic information about each task. You can change the way you view information in this grid by using the filter options or customizing columns. See “CRM Grids” on page 3-22.

The Option bar at the top of the Tasks grid allows you to create and maintain additional information associated with the selected task. The Tasks Option bar includes **History** and **Contacts** and any application (using the Application Builder) you add to the grid. See “Using the Option Bar” on page 3-39.

Adding Tasks

Click the **New** toolbar button, or right-click in the Tasks grid and select **New Record** from the menu.

The New Task window includes three tabs: **Task**, **Details**, and **User**.

Specify this information in the New Task window where applicable.

Task ID – You cannot edit this field. A system-generated number that uniquely identifies each task.

Subject – Specify the subject of the task in the field provided.

Specifications – The **Specifications** button allows you to specify specifications for the selected task.

If the specifications icon in the New Task window is active, specifications exist for the selected task. If the **Specification** icon is inactive, no specifications exist for the selected task.

To add specifications, you must first save your new task by clicking the **Save** toolbar button, then click the **Specifications** toolbar button. See “Maintaining Specifications” on page 4-21.

Refer to these tabs to add the new Task.

Entering Information in the Task Tab

The Task tab includes basic information about the task, such as reminders, start and due dates, status, estimated hours, and the person assigned to the task.

1. Click the **Task** tab to view general task information, if necessary.
2. Specify information in the Task tab for these fields:

   Due Date – Click the **Due Date** drop-down list to choose a due date for the task.

   Start Date – Click the **Start Date** drop-down list to choose a start date for the task.

   Completed – Indicates when the task was completed. Click the **Completed** drop-down list to select the date the task was completed.

   % Complete – Click the % Complete drop-down list to specify the percentage completed, or type a percentage in the field provided.

   Type – This field is available only if you use Infor VISUAL 8.0.0 or higher. Specify how the task is conducted, such as phone call, email, or meeting. Task Activity Types are defined in **Tools > Maintain > General Codes** of the main menu.

   Category – The topic of task, such as Admin, Legal, Sales. Click the down arrow to select from a user-defined list of categories. You can categorize your tasks and print customized reports using the categories option. Task categories are defined in **Tools > Maintain > General Codes** of the main menu.
3. To create a reminder for the selected task, select the **Reminder** check box to open a pop-up reminder window on the selected date and time you specify.

   When you select the **Reminder** check box, the Date and Time fields become active.

- Click the **Date** drop-down list to select a date (or specify a date in the Date field).
- Click the **Time** drop-down list to select a time (or specify the time in the Time field).

  Time options are both AM and PM, and listed in 30 minute intervals.

4 See these fields to specify the necessary information in the Task tab.

Comments – Include additional comments in the space provided.

Status – Click the **Status** drop-down list to select the status of the task. Choose from **Not Started**, **In Progress**, **Completed**, **Waiting**, and **Deferred**.

Priority – Click the **Priority** drop-down list to select the priority of the task. Choose from **Low**, **Normal**, or **High**.

Assigned To (Owner) – CRM automatically populates this field with the user name who created the task. To assign another employee to the task, click the **Browse** button and select the appropriate employee from the list.

Est Hours – Specify the estimated number of hours the task requires.

Act Hours – After the task is complete, specify the number of hours the task required.

5 Click the **Save** toolbar button.

Entering Information in the Details Tab

The Details tab lists the account, and/or document that relates to the task. The creator of the task and the date the task was last modified also appear on this tab.

1 Click the **Details** tab.

2 Specify this information in the Details tab.

Account – If the task relates to an account, click the browse button to select an account from the list.

If you entered an account in the Account field, click the additional **View Detail** button to view the account detail in the bottom pane. You must click the **Save** toolbar button before viewing account details.

Contact – Click the browse button to select a contact that relates to the selected task.

If you entered a contact in the Contact field, click the **View Detail** button to view the contact detail in the bottom pane. You must click the Save toolbar button before viewing contact details.

Relates To – If the task relates to a document type, such as a quote or a opportunity, click the **Relates To** drop-down list to specify a document type in the field.

Doc ID – Active only when a Document ID has been entered for the selected account. If the task relates to a specific document, click the browse button to specify an ID.

When you add a Doc Type (Relates To field) and Doc ID to the selected task, the task is displayed in the Tasks option of the selected record. For example, if you assign a specific task to an opportunity, when you select that opportunity in the Opportunities grid and click on the Tasks option bar button, the task you entered is displayed in the lower pane.

Creator – This field cannot be edited. The employee who created the task.

Created – You cannot edit this field. The date and time the task was created.

Modified- You cannot edit this field. The date and time the record was last modified.

3 Click the **Save** toolbar button.

Entering Information in the User Tab

The User tab contains user-defined fields that allow you to specify additional information for each task. Create fields in **Admin > User Defined Fields** on the Navigation Bar.

1 Click the **User** tab.

2 Click the **Save** toolbar button to save changes made to the **User** tab.

3 To return to the Tasks/My Tasks grid, click the **Toggle** button, or click on the **Tasks**/**My Tasks** menu button on the navigation bar.

Entering Information in the Back Office Tab

This tab is available only if you use Infor VISUAL 8.0.0 or higher.

Use the Back Office tab to specify user-defined information. The user-defined field labels are set up in Infor VISUAL. Information you specify in this tab can also be viewed and edited in the User Defined Fields dialog in Activities Entry in Infor VISUAL.

In each field, specify the information required for your company. You can specify user-defined information for any CRM task, whether the task relates to a CRM record or a VISUAL record.

Working with Task Reminders

Use the Reminder dialog to review deadline information about your tasks.

The table lists all active reminders. A reminder is active if the current date and time is on or after the reminder date and time, and the task has any status other than Closed. The table shows the Subject of the task and when the task is due.

Select a line in the table to view this information in the header:

Contact Name – The ID of the contact associated with the task.

Account Name – the name of the account associated with the task.

Related To – The type of record to which the task relates. Under the Relate To information, the subject of the task is displayed.

Due – The due date of the task.

Priority – The priority of the task.

Category – The category of the task.

Dismissing Task Reminders

When you dismiss a reminder in the Reminder dialog, the Reminder Days check box on the Task record is cleared. You will no longer receive a pop-up reminder to complete the task. You can re-select the Reminder Days check box on the Task record to create a new reminder.

To dismiss a single task, select the row and then click **Dismiss**.

To dismiss all tasks listed in the table, click **Dismiss All**.

Postponing Task Reminders

Use the Snooze buttons to redisplay task reminders at a later time.

To postpone a reminder for a single activity:

1. Select the line.
2. Specify when to redisplay the reminder. Select a value from the drop-down menu.
3. Click **Snooze**. The task is removed from the table. The amount you specified in the snooze time field is added to the reminder time on the task.

After the snooze interval has elapsed, the reminder is redisplayed.

Editing Tasks

1. With the appropriate task selected in the Tasks grid, click the **Toggle** button. You can also double-click the selected task.
2. Click the **Save** toolbar button after you are finished editing.
3. To return to the Tasks/My Tasks grid, click the **Toggle** button, or click the **Tasks**/**My Tasks** menu button on the navigation bar.

Deleting/Undeleting a Task

1. With the appropriate task selected in the Tasks grid, click the **Delete** toolbar button.

   You can also right-click on the task you want to delete and select **Delete Record(s)** from the menu.

   If you set up CRM to prompt you when deleting records, a Record Deletion dialog is displayed.
2. Click the **Yes** button to delete the task, or the **No** button to cancel the deletion.

3 You can undelete the record, as long as it has not been saved, by clicking the **Delete** toolbar button again, or select **Edit > Undelete Record(s)** from the main menu.

4 To permanently save your changes, click the **Save** toolbar button, or click the **Yes** button when exiting the grid.

Adding a Task to Outlook

You can add a task to Microsoft Outlook to view CRM tasks within Outlook, and to receive an automatic reminder on the specified date you entered in the Task tab of task details. See "Adding Tasks" on page 5–36.

1 With the task selected in the Tasks grid, select **Actions > Sync Task(s) to Outlook** from the main menu.

You can also right-click the appropriate task and select **Sync Task(s) to Outlook** from the menu.

2 In the VISUAL CRM dialog, click **Yes** to add all tasks in the Tasks grid, or click **No** to add the selected task only.

Click **Cancel** to return to the Tasks grid without adding a task to Outlook.

3 To view the tasks you created in Outlook, open Outlook.

4 If necessary, open **Outlook Today – (Personal Folders)** in the navigation bar by clicking the **+** button.

5 Click the **Tasks** button.

The CRM Tasks window lists all tasks sent to Outlook.

Refer to your Microsoft Outlook documentation for more information on using tasks in Outlook.

Attaching an Item to a Task

You can attach items such as contacts, or any application with a many to many relationship that is created in the Application Builder feature, to one or more tasks in the Tasks grid.

1 From the Tasks grid, select the task(s) to which you want to attach an item, or skip to step two if you want to attach an item to all the tasks in the grid.

2 Select **Actions > Attach Task(s) to** from the main menu.

3 In the Attach Item To Multiple Tasks dialog, click the **Item Type** drop-down list to select the type of record you want to Partner with the selected task(s). Choose from **Contacts**, or any application that has a Many to Many relationship created in the Application Builder.

4 Click the **Browse** button beside the Item ID field to select the record you want to attach. The Item ID list contains the type of records you selected in the Item Type field.

5 Select one of the two radio buttons.

Selected Tasks – Select this radio button if you want to attach an item to the tasks you selected in the grid.

All Tasks in Grid – Select this radio button if you want to attach an item to all the tasks in the Tasks grid.

6 Click **OK**.

You are notified once you attach the item to the task(s), it is permanent, meaning the item cannot be removed from the task(s).

7 Click **OK** to attach the item to the selected task(s).

Click **Cancel** to return to the Tasks grid without attaching the item.

You can view the attached items by selecting the task and clicking the **Contacts** option bar button or click the application option bar button that you associated with the task. The contact or application item you associated with the task is displayed in the bottom pane.

Drilling to Related IDs

You can open the record related to the task directly from the Tasks grid or Tasks Maintenance. In the Tasks grid, click the ID in the Rel ID field. In Tasks Maintenance, click the View Detail button next to the Doc ID field on the Details tab.

If you use CRM with VISUAL 7.1.x, related ID records are opened in CRM except for those with Customer Order, Estimate, or Shipment Related ID Types. For these three Related ID Types you can drill to the related VISUAL window.

If you use CRM with VISUAL 8.0.0 or higher, the application that is opened when you drill to related information depends upon the Related ID Type.

This table shows each related ID type, which window is opened when drilling to an ID of that type, and whether the window is a VISUAL window or a CRM window:

Related ID Type	Related ID drills to this application...	Related ID drill-to opens this application window
Account	CRM	Account
Address	CRM	Address
A/P Cash Disbur	VISUAL	Payment Entry
A/P Invoice	VISUAL	AP Invoice Entry
A/R Cash Recpt	VISUAL	Cash Receipt Entry
A/R Invoice	VISUAL	AR Invoice Entry
Call	CRM	Call
Catalog Item	CRM	Catalog
Competitor	CRM	Competitor

Related ID Type	Related ID drills to this application...	Related ID drill-to opens this application window
Contract	CRM	Contract
Contract Item	CRM	Contract
Contract Type	CRM	Contract Type
Customer	VISUAL	Customer Maintenance
Customer Order	VISUAL	Customer Order Entry
Employee	CRM	Employee
Estimate	VISUAL	Estimating Window
Event	CRM	Event
Attendee	CRM	Attendee
History Entry	CRM	History
Opportunity	CRM	Opportunity
Packlist	VISUAL	Shipping Entry
Part	VISUAL	Part Maintenance
Purchase Order	VISUAL	Purchase Order Entry
Quote	VISUAL	Estimating Window
Receiver	VISUAL	Purchase Receipt Entry
RMA	VISUAL	RMA Entry
Outside Service	VISUAL	Outside Service Entry
Service Dispatch	VISUAL	Outside Service Dispatch Entry
Service Order	CRM	Service Order
Task	CRM	Task Maintenance. You can open CRM Tasks and VISUAL Activities in Task Maintenance.
Vendor	VISUAL	Vendor Maintenance

Printing and Exporting Tasks

Several options to print and export Task information are provided in CRM. See these chapters for additional information:

- To print a report on all Task records in the Tasks grid, refer to “Printing All Records in a Grid” on page 4–22.

- To print a report on a specific Task record, refer to "Printing a Specific Record" on page 4–22.
- To print preloaded and user-defined reports, refer to "Using the Reports Menu Option" on page 4–24.
- To export the Tasks grid or a specific record within the Tasks grid and save it in a specified format, refer to "Exporting Grid Contents" on page 3–25.

Using the Calendar Feature

The Calendar feature helps you to organize your work schedule by allowing you to specify appointments, and view tasks while working in a day, month, or year mode.

Maintain appointments, contacts, and “quick edit” tasks using the Day mode. The tasks visible in the Calendar feature include all open tasks you entered from the Tasks grid. To create appointments, refer to "Maintaining Appointments" on page 5–45. To specify tasks, refer to “Adding Tasks” on page 5–36.

Accessing the Calendar Feature

Expand the Contact Center module by clicking the **+** button beside Contact Center, then click the **Calendar** button.

The Calendar feature automatically opens in the Day view. The Day view includes appointments for the day, a calendar that includes two visible months at a time, and a list of all tasks you entered.

The Calendar feature allows you to view in three different modes: Day, Month, and Year.

Viewing the Calendar Feature

There are three different ways to view the Calendar feature: Day, Month, or Year. Each view allows you to create new appointments and view multiple days by months. The Day view, however, is the only view that allows you to see your uncompleted tasks, and perform certain functions such as editing and completing Tasks, and editing and deleting Appointments. Each view in the Calendar feature is described below.

Day View

When you open the Calendar feature, the Day View automatically loads. To view the Day View, click the **Day View** toolbar button.

The Day View contains two panes: the Appointments pane and the Calendar and Task pane. The Appointments pane lists all appointments for the date specified in the Calendar area, and includes a Full Day Strip (to the left of the Appointments) that indicates when you have appointments for the current date. The Calendar and Task pane allows you to view two months at a time, and lists all open tasks you entered from the Tasks window in the Tasks Pad.

The Tasks Pad lists all the Tasks you entered that have not been completed. Tasks that appear in red are overdue, meaning they have passed the due date you set for completion.

To view appointments on a specific day, click the date you want to view in the Calendar. You can click the previous and next arrows to view additional months.

You can move the pane horizontally to minimize the appointments and enlarge the Calendar and Tasks pane or vice versa. You can also remove or include the Full Day Strip from the Day View by selecting or deselecting the **Show Full Day Strip** check box on the Appearance Tab of the Options window (**Tools > Options** on the main menu).

Month View

The Month View allows you to see a month's worth of appointments in one window. You can create appointments from the Month View, but you must return to the Day View to edit or delete specific appointments.

Click the **Month View** toolbar button to open the Month View.

By double-clicking any day within the Month View, you can open the Day View for that specific day. You can also click the **Calendar** button on the navigation bar to open the Day View.

CRM identifies the day you select by highlighting the day in yellow.

You can view future and/or previous months by using the scroll bar to the right of the window.

Year View

The Year View allows you to view an entire year within one window.

Click the **Year View** toolbar button.

Double-click any day within the Year View to open the Day View for the selected day. CRM recognizes the selected day by coloring the date in yellow.

View previous or next calendar years by clicking the **Prev Year** button or the **Next Year** button.

Maintaining Appointments

You can add, edit, and delete appointments in the Calendar feature. However the Day View is the only view that allows you to complete all three of these functions. The Month View and Year View allow you to create appointments, but not edit or delete them. Refer to the following for more information on maintaining appointments.

Adding Appointments

You can add appointments from any view in the Calendar feature.

From the Day, Month, or Year View, click the **New** toolbar button.

Note: If you are in Day View, you can create an appointment that automatically enters the appropriate time of the appointment by selecting the time slot within the Appointment pane, then clicking the ***New*** toolbar button.

The New Appointment window has three tabs: **Appointment**, **Details**, and **User**.

Specify this information in the New Appointment window.

Appt ID – You cannot edit this field. A system-generated number that uniquely identifies the appointment.

Subject – Specify a brief description of the appointment.

Refer to these tabs to add an appointment.

Entering Information in the Appt Tab

The appointment tab includes general information about the appointment (such as the start and end dates, status, category, and comments), and allows you to create a reminder for the selected appointment.

1 If necessary, click the **Appt** tab and specify this information.

2 Click the **Start Date** drop-down list to select a start date for the appointment. To change the time, click the appropriate hour or minute within the Start Date field and specify the necessary information.

3 Click the **End Date** drop-down list to select the end date for the appointment. To change the time, click the appropriate hour or minute within the End Date field and specify the necessary information.

4 To create a reminder for the selected appointment, select the **Reminder** check box. The default for this check box is selected with a 15 minute reminder time, however you can change this if you choose. This feature allows you to specify the time you want to remind you of your appointment by using a pop-up Reminder dialog. You do not have to have CRM running to receive this reminder.

   The reminder check box also places a bell icon before the subject of the appointment in the Day view mode.

   Click the **Minutes** drop-down list to specify the amount of time prior to your start date and time that you want to be reminded of your appointment.

   At the specified reminder time, the Reminder(s) window opens.

   You can dismiss a selected reminder, dismiss all reminders, or use the snooze feature to delay your reminders for a specified length of time.

   - To dismiss an appointment reminder, select the appointment then click **Dismiss**.
   - To dismiss all reminders, click **Dismiss All**.

   In the dialog, you are asked if you are sure you want to dismiss all reminders.

   - To dismiss all reminders, click **Yes**.

- To delay a reminder, select the reminder, then click the drop-down list beside the Snooze button. Select the amount of time you want to pass before the pop-up reminder opens again. Click **Snooze**.

Tentative – Select the **Tentative** check box if the appointment is not confirmed.

Private – Select the **Private** check box if the appointment is private.

Selecting the Private check box displays a key before the subject of the appointment in the Day view mode.

All Day Event – Select the **All Day Event** check box to indicate that the appointment time extends through the entire day.

Creator – You cannot edit this field. CRM automatically populates this field with the user name who created this appointment.

Assigned To – CRM automatically populates this field with the user name of the creator, however you can change the person assigned to this appointment by clicking the drop-down list and selecting an employee from the list. The Assigned To browse is filtered by users assigned to the site selected on the General tab.

If you assign the appointment to another user, the appointment is displayed in both your Calendar feature and the assigned user's Calendar feature for the specified date.

Category – The type of appointment, such as Administrative, Sales, or Marketing.

CRM uses the same category types as in the Tasks feature. Create Category Types in **Tools > Maintain > General Codes**. See "Maintaining General Maintenance" on page 2-5.

Comments – Specify any comments you want to add to the appointment.

5 Click the **Save** toolbar button.

Entering Information in the Details Tab

The Details tab includes the date the appointment was created, the date and time the appointment was last modified, the physical location of the appointment, and the account that relates to the appointment, if applicable.

1 Click the **Details** tab.

2 Specify this information in the Details tab.

Account – Click the **Account** button to select an account that relates to the appointment, if applicable.

If you chose an account, you can view the details of the account in the lower pane by click the **View Detail** button. You must save the appointment before you can access account details.

Location – Specify the location of the appointment, if applicable (for example, conference room, meeting room B, etc.).

Address ID – If this appointment is going to take place at a particular account address, click the Address ID button to select the account address.

Created – You cannot edit this field. This field is automatically populated with the date the appointment was created.

Modified – You cannot edit this field. This field is automatically populated with the date and time the appointment was last modified.

3 Click the **Save** toolbar button.

Entering Information in the User Tab

The User tab allows you to specify additional information associated with the selected appointment.

1 Click the **User** tab.

2 Enter the necessary information in the User tab.

3 Click the **Save** toolbar button.

4 To return to the Appointments window, click the **Toggle** button.

Editing Appointments

You can edit appointments in the Day View of the Calendar feature.

1 If necessary, click the **Day View** toolbar button.

2 Select the appointment you want to edit, then click the **Toggle** button located in the top left corner of the window.

You can also double-click the appointment.

3 Edit the necessary information.

4 Click the **Save** toolbar button.

5 To return to the Day View, click the **Toggle** button, or click the **Calendar** button in the navigation bar.

Deleting Appointments

Delete appointments in the Day View of the Calendar feature.

1 If necessary, click the **Day View** toolbar button.

2 Select the appointment you want to delete from the Appointments pane, the click the **Toggle** button.

3 Click the **Delete** toolbar button.

If you set your computer to prompt you when deleting records, a Record Deletion dialog is displayed.

4 Click **Yes** to delete the record, or **No** to cancel the deletion.

5 Click the **Toggle** button or click the **Calendar** button in the navigation bar to return to the Day View in the Appointments For window.

Maintaining Tasks

Maintain Tasks in the Day View of the Calendar feature.

If necessary, click the **Day View** toolbar button.

All open Tasks you entered appear in the Tasks Pad. Tasks that appear in red are overdue (based on the due date you specify for the task). You can remove Tasks when they have been completed by clicking the check box beside the task. See these instructions for more information on deleting Tasks.

Sort tasks in the Task pad by clicking on the column headers (**Status**, **Due Date**, **Priority**, **Subject**). Click the column header once to sort in ascending order, click the column header twice to sort in descending order.

Completing Tasks

When you complete a Task, the task is removed from the Tasks Pad. You can remove Tasks in the Day View of the Calendar feature.

1 If necessary, click the **Day View** toolbar button.

The Tasks Pad lists all the open Tasks you entered. When you complete a task, you can easily remove the Task from the Task Pad.

2 To remove a Task, click the check box at the beginning of the Task.

CRM automatically removes the Task from the Task Pad.

You can view the completed task in the Task window of the Tasks feature in the navigation bar. CRM enters a status of **Complete** in the Status field, and enters the date the task was completed in the Completed Date field.

Maintaining Contacts on Appointments

The Calendar feature contains one option on the Option Bar called Contacts. This option allows you to view contacts related to appointments, attach existing contacts, and add new contacts to the selected appointment.

Note: You can also create a new contact by selecting **Actions > New Contact Wizard** from the main menu. See “Using the New Contact Wizard” on page 4-12.

Double-click the appointment in the Appointments For window, or select the appointment then click the **Toggle** button.

Note: You can also access contacts for a specified appointment by selecting the appointment in the Day View, then clicking the Contacts option bar.

Click the **Contacts** option button on the Option bar

Adding a Contact

Make sure the Contacts For Appointment pane is active by clicking anywhere within the pane.

Click the **New** toolbar button, or right-click within the window and select **New Record** from the menu.

See “Adding Contacts” on page 5-26.

Attaching an Existing Contact

You can attach an existing contact to the account associated with the selected appointment.

1 Make sure the Contacts For Appointment pane is active by clicking anywhere within the pane.

2 To attach an existing contact to the appointment, right-click within the bottom pane and select **Attach Existing Contact** from the menu.

3 Select the contact you want to add from the Lookup dialog, then click **OK**.

The contact you selected is displayed in the Contacts For Appointment window. The contact is now associated with the selected appointment.

4 To attach additional existing contacts, repeat steps 1 through 3.

5 Click the **Save** toolbar button.

Attach an Item to One or More Contacts

You can attach a task, appointment, opportunity, quote, contract, or any record you create using the application builder to one or more contacts associated with an appointment.

Note: Once you attach an item to one or more contacts, you cannot remove the item from the contact(s).

1 Make sure the Contacts For Appointment pane is active by clicking anywhere within the pane.

2 If you want to add items to one or more selected contacts, select the contact(s) in the Contacts for Appointment pane.

3 Select **Actions, Attach Contact(s) to** from the main menu.

4 In the Attach to section, select one of these option buttons:

Selected Contacts – Select this radio button if you want to attach the item to the contacts you selected in the Contacts for Appointment pane.

All Contacts in Grid – Select this radio button if you want to attach the item to all the contacts associated with the appointment in the Contacts for Appointment pane.

5 In the Select item to attach section, select one of these option buttons:

Item Type – Click the drop-down list to select one of these types of items: **Task**, **Appointment**, **Opportunity**, **Quote**, **Contract**, or any application you create using the Application Builder.

Item ID – Click the **Item ID** button to select the specific record from the list. The list of records contains the type of records you selected in the Item Type field.

6 Click **OK** to add the items to the contact(s).

7 In the dialog, click **OK** if you want to attach the item to the specified contact. Once you attach an item, you cannot remove the item from the contact.

Assigning a Primary Contact

You can assign a contact as the primary contact for an appointment. This function only applies to the Calendar feature and does **not** change the primary contact in the Accounts feature or other features within CRM.

1 Make sure the Contacts For Appointment pane is active by clicking anywhere within the pane.

2 Select the contact you want to be a primary contact for the selected appointment.

3 Right-click within the Contacts For Appointment pane and select **Set Primary Contact** from the menu.

A **Primary Contact** icon is assigned beside the selected contact.

Deleting a Contact

1 Make sure the Contacts For Appointment pane is active by clicking anywhere within the pane.

2 Select the contact you want to delete, then click the **Delete** toolbar button, or right-click the contact and select **Delete Record(s)** from the menu.

If you set your computer to prompt you when deleting records, a Record Deletion dialog is displayed.

3 Click **Yes** to delete the contact, or **No** to cancel the deletion.

4 With the deleted record selected, you can undelete the record (as long as the record has not been saved) by clicking on the **Delete** toolbar button again, or select **Edit > Undelete Record[s]** from the main menu.

5 To permanently save your changes, click the **Save** toolbar button, or click **Yes** when exiting the pane.

Using the Addresses Feature

The Addresses feature includes all addresses in the CRM address table. Access this feature to add, edit, or delete addresses for accounts, contacts, or any other field or feature that requires an address.

The Addresses feature allows you easy access to all addresses in the CRM address table, and is a good data source for applying a mail merge. For information on the Mail Merge function, refer to "Using Mail Merge" on page 4–8.

In order for an address to be accessible in all features that require addresses, you must create the address using the Addresses feature.

Accessing the Addresses Feature

1 Expand the Contact Center module in the navigation bar by clicking the **+** button.

2 Click the **Addresses** button.

The Addresses grid lists all addresses entered in CRM. The Addresses grid includes basic information about each address.

3 You can access details for each address by selecting the address then clicking the **Toggle** button, or by clicking the account name (the text in blue and underlined).

Maintaining Addresses

You can add, edit, and delete addresses from the Addresses feature. Refer to the following for information on each procedure.

To view a CRM address in VISUAL, the address must be associated with an account that has been converted to a customer (integrated with VISUAL). If you assign an address to an account that is not converted to a customer in VISUAL, then the address you created will not be accessible in VISUAL.

You can assign multiple addresses to an account that has been converted to a customer in VISUAL and those addresses that are not the primary address for that account can be accessed from the **Edit > Shipping Addresses** menu in the VISUAL Manufacturing Customer Maintenance window.

Adding Addresses

From the Addresses window, click the **New** toolbar button, or right-click the Addresses grid and select **New Record** from the menu.

Specify this information in the New Address window where applicable.

Address ID – You cannot edit this field. A system-generated number that uniquely identifies the Address.

Location – Specify a brief description on the location of the address.

Refer to these tabs to continue specifying your new address.

Entering Information in the General Tab

The General tab includes basic information about the address such as the account or contact, address, and general comments.

1 Click the **General** Tab, if necessary.

2 Specify this information on the General tab:

Account – If the address is associated with an account, click the browse button to select an account from the list.

In the dialog, click **Yes** to add the existing address and other field information assigned to the account to the new address record, or click **No** to assign the account but specify your own address and other field information.

If you specify an account, click the additional **View Detail** button to view the account detail in the bottom pane. You must click the **Save** toolbar button before viewing the account detail window.

Ship To ID – Displays the ID associated with the customer's Ship To address. You cannot edit this field.

Shipping / Site - Specify the shipping site in the field.

Loc Address – Specify the address in the fields provided.

City, St Zip – Specify the city, state, and zip code of the address.

Country – Specify the country of the address.

Comments – Specify any relevant comments for the address in the Comments field.

Inactive - This address is inactive when this box is checked.

Contact – If the address is associated with a contact, click the browse button to select a contact from the list.

When a contact is selected, basic contact information is displayed in the field box below the Contact field.

If you choose a contact, click the additional **View Detail** button to view the contact detail in the bottom pane. You must click the **Save** toolbar button before viewing the contact detail window.

3 Click the **Save** toolbar button.

Entering Information in the Details Tab

The Details tab includes location information, assigned sales representative, the shipping method, and tax information.

1 Click the **Details** tab.

2 Enter the following information in the Details tab.

Territory – Click the browse button to select a sales territory for the address.

County – Click the drop-down list to select a county for the address.

Area – Click the drop-down list to select the area where the address is located.

Sub-Area – Active when an area that contains sub areas is selected from the Area field. Click the drop-down list to select a sub area for the address.

Owner – Click the browse button to select the owner for the address.

Sales Rep – Click the drop-down list to select a sales representative from the list. If you use Infor VISUAL 10.0.0 or higher, the list shows active sales reps only.

Discount – Click the drop-down list to apply existing user-defined discounts to the address.

Discount codes allow you to assign preset discount percentages to each account. Add discount codes in *VISUAL.* Discount Codes integrate with CRM and VISUAL.

Description - Specify a brief description, if necessary.

Carrier ID – Click the drop-down list to select a carrier for shipments.

FOB – Click the drop-down list to choose from a list of Free on Board codes.

Free on Board codes determine at what point in the shipping process the customer must take responsibility for shipping fees for the goods your company is shipping.

Ship Via – Select who will ship merchandise for this account by clicking on the drop-down list, and selecting an existing shipping name from the list.

Lang ID - Click the drop-down list to select a Language ID from the list.

Tax Grp ID – Click the browse button to select a sales tax for the account from the list.

Tax ID# – Specify the Tax ID number for the account.

Tax Exempt – Select the **Tax Exempt** check box if the company is exempt from taxes.

3 Click the **Save** toolbar button.

Entering Information in the User Tab

The User tab allows you to attach additional information to the selected address. You can use these user-defined fields to locate records easily by sorting and filtering, and produce customized reports.

Create user defined fields from the Navigation Bar in **Admin > User Defined Fields**.

1. Click the **User** tab.
2. Enter the necessary information in the User tab.
3. Click the **Save** toolbar button when you are finished entering information.
4. To return to the Addresses grid, click the **Toggle** button, or click the **Addresses** button in the navigation bar.

Entering Information on the VAT Tab

You must enable VAT in VISUAL for the VAT tab to appear in the address window.

Note: If you have enabled VAT in VE, the use of Sales Tax IDs is disabled: ALL existing Sales Tax IDs in your database are disabled. If you want to use Sales Tax IDs, you must clear the **Value Added Tax Support Enabled** check box in the Application Global Maintenance window of VISUAL.

When you are using VAT, VAT information is populated on your quotes, orders, and invoices.

Use the VAT tab to specify Value Added Tax information for this account.

To access account VAT information, click on the VAT tab.

Enter the following information in the VAT tab:

VAT Registration – Specify the VAT Registration Number of your customer.

VAT Code – Click the VAT Code browse button and select the VAT code you want to use.

Shipping Address VAT Code Overrides Part VAT - You can apply VAT to specific parts. If you want the current customer’s VAT code to override the assigned Part ID’s VAT code, select this check box. If you clear this check box, the part VAT code is applied, even if your customer has a VAT code.

When you have finished setting up the VAT information for this account, click the **Save** toolbar button.

Entering Information on the Intrastat Tab

To access account Intrastat information, click on the Intrastat tab.

Specify this information:

Port of Arrival – Select the port at which this customer usually receives its goods.

Port of Transshipment – Select the port of transshipment for this customer. A port of transshipment is the location from which goods are shipped.

Country ID – Select the customer’s Country ID.

Nature of Transaction – Select the nature of transaction for this customer.

Nature of Return Transaction – Select the nature of return transaction for this customer. By default, this transaction code is used for a return transaction.

Mode of Transport – Select the method by which goods are delivered to the customer’s port of arrival.

Siret Number – Specify the customer’s siret number. A siret number is a French company ID number.

Editing Addresses

1. From the Addresses grid, select the address you want to edit, then click the **Toggle** button.
2. Edit the selected address.

3 Click the **Save** toolbar button when you are finished editing.

4 To return to the Addresses grid, click the **Toggle** button, or click the **Addresses** button in the navigation bar.

Deleting Addresses

1 From the Addresses grid, select the address you want to delete.

2 Click the **Delete** toolbar button, or select **Edit > Delete Record(s)** from the menu.

If you setup CRM to prompt you when deleting records, a Record Deletion dialog is displayed.

3 Click **Yes** to delete the address, or **No** to cancel the deletion.

4 You can undelete the record, as long as it has not been saved, by clicking the **Delete** toolbar button again, or select **Edit > Undelete Record(s)** from the main menu.

5 To permanently save your changes, click the **Save** toolbar button, or click the **Yes** button when exiting the grid.

Printing and Exporting Addresses

Several options to print and export Address information are provided in CRM. Refer to the following chapters for additional information:

- To print a report on all Task records in the Tasks grid, refer to “Printing All Records in a Grid” on page 4–22.
- To print preloaded and user-defined reports, refer to “Using the Reports Menu Option” on page 4–24.
- To export the Tasks grid or a specific record within the Tasks grid and save it in a specified format, refer to “Exporting Grid Contents” on page 3–25.

Using the History Feature

The History feature contains a grid that lists manually created notes (titled as New History Entry), system-generated notes and events, email correspondence, and all other system-generated notes for contacts, accounts, calls, issues, opportunities, catalog items, and service orders. The History feature acts as a paper trail for tracking your correspondence, notes, and other information you want to be able to access at a later date.

You can allow users to view, edit, and delete History items in the History grid if you have set the correct permissions in the Security feature. For information on setting permissions, refer to "Using the Security Feature" on page 13–22. You cannot create History items in this feature. Refer to "Maintaining History Items" on page 5–57.

The most recent item in the grid is placed at the beginning of the list for easy access, and basic item information viewable from the History grid can be customized by adjusting and replacing grid columns.See “Changing the Appearance of Grids” on page 3-24.

You also have the option to specify a Quick History that is accessible from other grids within CRM. For more information on the Quick History feature, see “Creating a Quick History” on page 4-17. Quick History is available from the main menu, or by using **CTRL** + **H** on your keyboard.

Accessing the History Grid

Click the **+** symbol beside the Contact Center in the Navigation Bar, then click the **History** button.

The History grid contains all notes (New History Entry) that are system-generated or manually entered, system-generated events, email correspondence, and all other system-generated records such as opportunities, accounts, issues, calls, catalog items, service orders, etc.

Maintaining History Items

You can edit or delete items within the History grid. Refer to the following for more information.

To create New History Entries, you must access the appropriate grid. For example, to create a New History Entry for a specific account, you need to access the Accounts grid.

Editing History Items

1 Select the item you want to edit in the History grid, then click the **Toggle** button to open the item.

Refer to the following information in the History header detail record. Specify information to complete the header of this document.

Account – The account associated with the selected record. Click the browse button to select a different account.

You can view the details of the selected account by clicking the **View Detail** button. You must save the history record before you can view account details.

Contact – The contact associated with the selected record. Click the browse button to select a contact associated with the account.

You can view contact details by clicking the **View Detail** button. You must save the history record before you can view contact details.

Private – Select this check box to make the history record viewable to the creator of the record only.

Type – The type of history record. Click the drop-down list to select a user-defined history type. To create options for this field, select **Tools > Maintain > General Codes**. See “Maintaining General Maintenance” on page 2-5.

2 Click the **Main** tab, if necessary.

The Main tab contains Account and Contact IDs, a description of the item, attachments, and additional comments.

3 Refer to the following fields to edit information in the Main tab.

Summary – A brief description of the record.

Attachments – The Attachment field allows you to attach one or more files to the record. Click the browse button to select and add a file to the record. To attach additional files, click the Browse button again and select the file.

If an attachment is added to a record, and the **Attachment** column is visible in the grid, an **Attachment** icon is displayed next to the history item in the grid.

Delete an attachment by clicking the attachment, then right-click your mouse and select **Delete** from the menu.

Create history types in **Tools > Maintain > General Codes** from the main menu.

4 Enter any additional information regarding the item in the text block.

5 Click the **Details** tab.

The Details tab includes documents associated with the record such as the type of document, the Document ID, and if necessary, the line number. This tab also includes user information.

6 Refer to the following fields to edit the Details tab.

Note ID – The unique number that identifies the note or record.

Related To – The type of record or note, such as Account, Call, Call Issue, Catalog Item, etc. This is the type of record that is associated or linked to the note.

Task ID/Call ID/Srvc Order ID/Opty ID/Call Issue ID – Your field name may differ from the example window depending on what type of record is associated with your note. This field identifies the ID of the record that is associated with the selected note.

Line Number – If your note or record is associated with a Call Issue, the line number related to the note is visible as a part of the **User Generated Note** section.

User Date – You can specify a date or time in this field. The information you specify is displayed in the Note Date column of the History grid.

Creator – The user name of the person who created the item or note.

Created Date – The date the user created the note.

Last User – The user name of the last user to access the note.

Last Modified – The date the user modified the note.

7 Click the **User** tab.

The User tab allows you to create additional user-defined information for your history items. Create fields for the User tab in the Navigation bar in **Admin > User Defined Fields**.

8 Enter the necessary information in the fields provided.

9 When you are finished editing the Users tab, click the **Toggle** button to return to the History grid.

Deleting History Items

1 Select the history item you want to delete from the History grid or in the detail of the history item.

2 Click the **Delete** toolbar button.

If your settings require CRM to prompt you when deleting records, the Record Deletion dialog is displayed.

3 Click **Yes** to delete the record, or **No** to retain the record.

4 To remove the record from deletion (to undelete the deleted record), click the Delete toolbar button again.

5 If you want to remove your deleted record from the grid, click the **Save** toolbar button.

Printing and Exporting History Items

There are several options to print and export History information in CRM. Refer to the following chapters for additional information:

- To print a report on all History records in the History grid, refer to “Printing All Records in a Grid” on page 4–22.
- To print preloaded and user-defined reports, refer to “Using the Reports Menu Option” on page 4–24.
- To export the History grid or a specific record within the History grid and save it in a specified format, refer to “Exporting Grid Contents” on page 3–25.

Chapter 6: Mail

This chapter includes:

Topic

About Mail

The Mail module allows you to view basic mail folders and perform most email functions found in Microsoft Outlook without exiting CRM. When CRM is running, mail sent to or received from a contact is automatically recorded in the respective contact's history. You do not need to open Microsoft Outlook to receive or send email when operating CRM.

You have access to the address book, the Customize Outlook View option, in addition to other email functionality, and view and work with the following folders: Public Folders, Mailbox, and Personal Folders.

You can also choose to use the Microsoft Outlook email grid in CRM.

To set up basic email parameters, including whether to use the Microsoft Outlook email grid, refer to "Specifying Mail Settings" on page 3–41.

Accessing Mail Options

Click the **+** or **–** sign beside the Mail module in the CRM Navigation bar.

Click the appropriate Mail option.

You can open, reply, delete, forward, or move the files in one or more of the mail options. You can also access the address book, and customize your grid columns. Refer to your Microsoft Outlook documentation for more information on email functionality.

Choosing an Email Recipient

When you click the **New** button to create a new email, you can choose a contact from your email system contact list or a contact from CRM.

To choose from existing CRM contacts, click the **Ellipse** button to the right of the To field.

The system lists the contacts already included in the email. To add another contact, specify the following:

Type – Select the type of addressee. Your options are To, CC, and BCC.

Contact Name – If you would like to choose a contact based on Contact name, click the Contact Name browse button to choose a contact. The system inserts the Email, Contact ID, and Account Name associated with the contact.

Email – If you would like to choose a contact based on Email, click the Email browse button to choose an email. The system inserts the Contact name, Contact ID, and Account Name associated with the email.

Save History – If you would like to create a History record for this email, select the Saved History check box. If you do not want to create a History record for this email, clear the Saved History check box.

You can also set the Save History setting on the email message window. Click the **Save History** button to create a History record. The system places an icon to the left of the Save History button label to indicate that the button is selected. If you want to create a private History record that only you can view, click the **Private** button. The system places a check box to the left of the Private button label. If you would like to share the history record with other CRM users, click the **Private** button again until the check box disappears.

Relates Type – If this email relates to another document in CRM such as a Contract Item or Call, click the Relates Type drop-down button to select the type of document related to the Email.

Relates ID – Click the Relates ID browse button to select the particular CRM document related to the Email.

Click **Ok**. The system addresses the email as you specified.

To send an email to a contact in your email system contact list, click the **To** button to select a contact. If you select Save History and the contact does not exist in CRM, CRM gives you the option of adding the contact.

Using Microsoft Outlook for Email

If you selected the Use Outlook form and Email grid check box in the Options - Mail tab, the system displays the Microsoft Outlook mail grid when you access Mail in CRM. See “Specifying Mail Settings” on page 3-41.

In order for CRM to have control over emails in the Outlook Grid (for history records), you must use the toolbar buttons to send, reply, reply all, send, and forward. If you use the right-click menu or double-click on a grid row to perform an action on an email, CRM will not record history information. If the CRM Contacts button is displayed in the toolbar, then CRM has control of the email record.

Using Email Tools

These tools are available on the toolbar when using Outlook in CRM:

New – Select New to compose a new email using Outlook. When you select this tool, the CRM Contacts button becomes available.

Save History – Select Save History to create history record(s) for the contacts associated with the currently selected email grid line. When you select this tool, the CRM Contacts button becomes available.

Reply – Select Reply to reply to the sender of the currently selected email grid line. When you select this tool, the CRM Contacts button becomes available.

Reply All – Select Reply All to reply to all contacts associated with the currently selected email grid line. When you select this tool, the CRM Contacts button becomes available.

Forward – Select Forward to send the currently selected email grid line to another contact. When you select this tool, the CRM Contacts button becomes available.

Email preview – Select Email preview to open the currently selected email grid line for review. You can reply to, reply to all, or forward the message from the Email preview. You have the option of creating History records using the CRM Contacts button when you perform an action from the Email preview.

Specifying Email Options for Use with Outlook

When you click the CRM Contacts button in the CRM toolbar, the system opens the Email Options window. This window has the same functionality as the standard CRM Email Contacts dialog with these additions:

Multi ID column – This read-only column notifies you that more than one contact has the same email address. You can choose the contact you would like to use for the history record by clicking the ellipse button and selecting the correct contact.

Apply – Click this button to apply any changes to the contacts grid to the current Outlook email window. After you click apply, the Email options window is hidden from view. Any changes you make to the recipients in Outlook will also update in the Email Options window.

Cancel – Click this button to hide the Email Options window from view. Any changes you made in the Email Options window will not be applied to the current email.

Chapter 7: Sales

This chapter includes:

Topic

About Sales

The Sales module on the navigation bar includes nine features that allow you to create sales plans, specify sales quotas, access pipeline charts based on quotas, create and maintain quotes and quote line items, opportunities, estimates, competitors and orders, and view shipments for CRM customers.

CRM is designed to give you flexibility in the way you organize and process your sales records. You can use the multiple sales features in CRM to customize your sales process. You do not have to utilize all of the CRM sales features to successfully maintain CRM records. For example, your business may not need to track sales plans on opportunities, or you may decide not to use one of the sales features.Most of the features in Sales are integrated with each other and other applicable features within CRM, and VISUAL.

Using the Sales Plans Feature

Use the Sales Plans feature to create and maintain Sales Plans in your CRM database. Sales Plans are detailed outlines of a sales cycle, and are used to track the status of a potential sale when applied to an opportunity. Sales Plans include sales plans, sales stages, and sales activities.

Sales Plans are also used in Pipeline Charts. Refer to "Using the Pipeline Charts Feature" for more information.

Accessing Sales Plans

The Sales Plans feature opens the Sales Plan Definition window which includes three tabs: **Sales Plans**, **Stages**, and **Activities**. All three tabs must be completed appropriately to accurately track the opportunity.

Expand the Sales module by clicking on the **+** button in the navigation bar, then click the **Sales Plans** button.

The Sales Plan Definition window opens with the **Sales Plans** tab visible. The first step in creating a sales plan is to create the Sales Plan name and description. After a sales plan is created, you can then include the stages of the sales plan and the activities within each stage.

To create and maintain Sales Plans, refer to the appropriate headings described later in this chapter.

Altering Sales Plans

There are specific items in the Sales Plan that cannot be altered. These items are integrated with other parts of CRM, like the Pipeline Chart feature, to ensure that all sales plans function the same way so results are consistent and understandable.

The following items cannot be edited or deleted:

Sales Plans: **Fast**, **Standard**

Note: The Fast and Standard Sales Plans are only functional and available within the CRM demo database NOT in a production database.

Sales Stages: **Lead**, **Qualified**, **Prospect**, **Demo**, **Vend**, **Won**.

Note: The Sales Stage descriptions can be changed, but not the Sales Stage Names.

Any *additions* or *edits* you make to a selected Sales Plan that are user-defined, meaning items that are not part of the list above, will not alter the selected Sales Plans that were already assigned to opportunities. However, if you *delete* any of the user-defined fields in a selected Sales Plan, those deletions are reflected in those selected sales plans that are assigned to opportunities.

The Pipeline Chart reflects all changes made to the Sales Plans.

Exiting the Sales Plan Definition Window

At any point, you can click **Cancel** to exit the Sales Plan Definition window without saving your changes.

In the dialog, click **Yes** to save your changes or **No** to exit the window without saving changes.

Another dialog is displayed, confirming the changes you made to the specified Sales Plan(s), Stage(s), and/or Activities.

Click **Yes** to exit, or **No** to return to the Sales Plan Definition window.

Adding a Sales Plan

1. Click the Sales Plan tab if necessary, to view the Sales Plan information.
2. Click the first blank or empty cell under the **Sales Plan Name** column, then specify the Sales Plan name.

   If no blank cell is visible, click the asterisk to the left of the cell to create a new row.
3. In the same row, click the cell under the **Description** column, then specify a description for the plan.
4. Click **Apply** to save the Sales Plan to the database.

Entering Information on the Stages Tab

1. Click the **Stages** tab.

   Note: The table lists all sales stages within all sales plans, not all the stages within the new sales plan you created. You can view all sales stages for all sales plans so you do not duplicate sales stages for your new sales plan.

   The Sales Stage is used to determine the probability of a sale. Within each Sales Stage are activities or tasks that need to be completed in order to win the sale. With each completed activity, the probability of winning the sale increases.

   The Sales Stage is also used in Pipeline Charts to graphically compare potential sales to quotas.
2. Click the first blank or empty cell under the Stage Name column, then specify the Stage name.

   If no blank cell is visible, click the **Asterisk** button to the left of the cell to create a new row.
3. In the same row, click the cell under the **Description** column, then specify a description for the sales stage.
4. In the same row, click the cell under the **Probability** column, then specify a probability for the sales stage. The probability is the percentage chance that with each completed stage, the opportunity will be won.
5. If you are integrated to Infor10 ION, use the SOA Code drop-down list to map your stages to SOA codes.

6 Click the up or down arrows to move the selected sales stage up or down within the stages grid.

7 Click **Apply** to save your Sales Stages.

Entering Information on the Activities tab

1 Click the **Activities** tab.

Activities are the tasks or activities that must be completed within each Sales Stage in order to increase your probability in winning the sale. You must include at least one activity for each Sales Stage you create.

2 Click the drop-down list beside the Select Sales Plan to Define field to apply activities to the appropriate Sales Plan.

3 Click the drop-down list beside the Stage field to apply activities to the appropriate Sales Stage.

The list of Sales Stages contain all the Sales Stages entered for the selected Sales Plan.

4 Enter the activity or task in the Activity field.

5 Enter how many days the activity will take in the Completing This Activity Should Take __ Days field.

The number of days you specify in this field is calculated to produce calendar dates for estimated completion of a sales plan in the Opportunity record.

6 Select the **Automatically Add this Activity When a User Selects this Plan** check box to automatically include this activity in the Sales Plan when a user selected this sales plan.

This check box is the same as the **Auto** check box in the **Sales Plan Details** section.

7 Click the **Add** button to add the activity to the selected Sales Plan and Sales Stage.

The activity you created is added to the Sales Plan table. Notice that activity is added to the end of the activities in the specified Sales Stage.

8 The **Auto** check box is the same as the **Automatically Add this Activity When a User Selects this Plan** check box.

To apply an activity to the Opportunity detail record when you select a sales plan, select the **Auto** check box beside the activity you want to add.

To keep an activity assigned to a sales plan in this dialog but not visible when the sales plan is selected for an opportunity, leave the **Auto** check box unchecked.

Note: You have the option to apply the activities that are not automatically visible when a sales plan is selected in an Opportunity record by clicking the **Add Activity** button in the Opportunity detail window. See “Using the Opportunities Feature,” on page 7–9.

9 To create additional activities for the selected sales stage, repeat steps 13 through 19.

10 To change the position of an activity, select the activity then click the **Up** or **Down** arrow buttons located to the right of the activities. Each time you click the Up or Down arrow buttons, the selected activity moves up or down one row.

Note: You cannot move the activity outside the Sales Stage you selected in the **New Activity**

section.

11 Click **Apply** to save your activities.

12 Click **OK** to return to CRM when you are finished.

Editing Sales Plans

1 Expand the Sales module by clicking on the **+** button in the navigation bar, then click the **Sales Plans** button.

2 Edit the necessary information in the **Sales Plan**, **Stages**, and **Activities** tabs.

3 When you are finished editing, click **Apply** to save your changes.

4 Click **OK** to exit the Sales Plan Definition.

Deleting and Undeleting Sales Plans, Sales Activities and Sales Stages

You can delete activities, sales stages, or the entire sales plan from the Sales Plan Definition window.

1 In the Sales Plan Definition window, click the tab that contains the information you want to delete.

2 Select the activity, sales stage, or sales plan you want to delete, if necessary.

3 Right-click and select **Delete Record** from the menu.

4 You can undelete a record as long as you haven't saved the deletion by selecting the deleted record, then right-clicking and selecting **Undelete Record** from the menu.

The record turns to an active status.

5 To save your changes and remain in the Sales Plan Definition window, click **Apply**.

To save your changes and exit the window, click **OK**.

To exit the window without saving changes, click **Cancel**.

Using the Quotas Feature

A quota is a projection, or goal of sales revenue. Quotas project sales revenue for individual sales reps, territories, business units, divisions, branches or the company (All). Use the Quotas window to Assign quotas for sales reps, or areas up to five years in advance.

Quotas are broken down by months, where you can specify 12 quotas per year and by sales stages within sales plans. You can create additional sales stages in the Sales feature.

Entries made in the quota fields produce an informative pipeline chart by comparing quota data to active opportunity data. See “Using the Pipeline Charts Feature,” on page 7–17..

Accessing Quotas

Expand the Sales module in the navigation bar by clicking the **+** button, then click the **Quotas** button.

You can assign quotas for each area or sales rep or all. The information you specify in the **Assign Quotas For** section is reflected in the table which is displayed after your entries are made.

Maintaining Quotas

1. Expand the Sales module in the navigation bar by clicking the **+** button, then click the **Quotas** button.
2. Click the drop-down list to select from **All**, **Sales Rep**, **Territory**, **Business Unit**, **Division**, or **Branch**. The Level field lists all quotas for a selected area.
3. Click the drop-down list to specify an ID, if applicable.

   The ID field options vary depending on the entry you selected in the Level field. IDs show quotas of specific places or individuals within a level.
4. Click the drop-down list to select a year from the list.

   The column headings in the sales quota table are the Sales Stages in the Sales Plans feature. When you specify the amount each area is expect to generate each month throughout the year, these quotas can then be compared to the actual amounts pending for opportunities that are in one or more of the named sales stages using the Pipeline Chart feature. Remember, sales stages indicate the level of certainty that the opportunity will become a sale.

   You can create additional Sales Stages by accessing the Stages tab in the Sales Feature. See “Adding a Sales Plan,” on page 7–4.
5. The easiest way to specify quota information, assuming all your quotas are the same for each month, is to specify the quotas for each sales stage in the January row, then use the **Fill Table** button. Refer to step 6 after entering in a quota for each sales stage for the month of January.

   If your quotas for each month are different, you can add or edit the quota by clicking the cell you want to change, then typing the amount of the quota. Skip to step 9.

6 After you have entered quotas for all sales stages for the month of January, click the **Fill Table** button located below the table.

7 In the dialog, click **Yes** to fill all other months with the same quota values you entered for January, or **No** to return to the Sales Quota window without filling the table.

   If you choose to fill your table, all the quotas you entered in each Sales Stage for January are copied and those values are entered in the rest of the 11 months.

8 Click **Apply** to save your changes, or click **Cancel** to exit the Sales Quotas window without saving changes.

9 Click **OK** to exit the Sales Quotas window.

Using the Opportunities Feature

Opportunities are records for potential sales. Opportunities track your potential sales, and offer information to graphically represent each stage of the opportunity using the Pipeline Chart feature.

The **Opportunities** and **My Opportunities** buttons allow you to create and maintain opportunities, flag opportunities for follow-up, and use the Opportunities grid as a data source for a mail merge.

The Opportunities and My Opportunities features open the same grid, but filter data differently. The Opportunities grid includes all opportunities that have been entered in the system in your allowable sites. The My Opportunities grid lists only the opportunities you enter.

Accessing the Opportunities Grid

Expand the Sales module by clicking the **+** button beside Sales in the navigation bar, then click the **+** button beside the Opportunities feature.

Click the **Opportunities** or **My Opportunities** button.

The Opportunities grid displays opportunities associated with your allowable sites and lists basic information about each opportunity. You can change the way you view information in this grid by using the filter options or by customizing columns. See “CRM Grids,” on page 3–22.

The Option bar at the top of the Opportunities grid allows you to create and maintain additional information associated with the selected opportunity. The Opportunities Option bar includes **History**, **Tasks**, **Contacts**, **Competitors**, **Quotes**, **Estimates**, and any applications you added from the App Builder module. See “Using the Option Bar,” on page 3–39.

Creating Opportunities

Click the **New** toolbar button, or right-click in the Opportunity grid and select **New Record** from the menu.

Some fields on the New Opportunity window can be setup to automatically populate with default data. To set defaults, refer to “Using the Defaults Feature” on page 13–3.

Refer to the following information in the New Opportunity window.

Opportunity ID – You cannot edit this field. A system-assigned number that uniquely identifies the opportunity.

Description – Specify a description of the opportunity.

Specifications – To add specifications, click the **Specifications** toolbar button.

See “Maintaining Specifications,” on page 4–21.

Review and specify information on these tabs in the New Opportunity window.

Entering Information in the General Tab

The General tab includes basic information about the selected opportunity such as the account, sales representative, status, type, open and close dates, and amount.

1 Click the **General** tab.

2 Enter this information in the General tab.

Site ID – If you use multiple sites, click the **Site** arrow and select the site for this opportunity. You can choose any of your allowable sites. If you use a single site, the ID of the site is inserted.

Account – Click the browse button and select the account or the customer who requests services or products.

Depending on the account you select, some fields in the General tab automatically populate. You can edit these fields for this opportunity, if necessary.

After you specify an account in the Account field, you can click the **View Detail** button to view account detail in the bottom pane. You must click the **Save** toolbar button before viewing the account details.

Sales Rep – Click the drop-down list to select a sales rep for this opportunity. If you use Infor VISUAL 10.0.0 or higher, the list shows active sales reps only.

If a primary sales rep is assigned to the account you selected, the sales rep automatically populates this field.

Est. Close – Click the drop-down list to choose an estimated close date from the calendar. When you add or update a sales plan, the system inserts the Scheduled Complete Date of the final task in the sales plan into this field.

Open – The date the opportunity was created. The current system date is automatically entered. Click the drop-down list to choose a different date from the calendar, if necessary.

Units – Specify the number of products the customer wants to order.

Unit Price – Specify the unit price of the product.

Amount – The total amount of the opportunity is automatically calculated after you specify the Units and Unit Price fields.

Probability % – Select or specify the probability of this opportunity closing by the estimated close date.

Opportunity/Lead – Select a classification for this opportunity. If you selected an account that is designated as a lead on the account record, then the system designates the opportunity record as a lead.

Comments – Specify comments related to this opportunity in the text box provided.

Current Stage – Displays the current sales stage for the opportunity. This field is updated automatically as the sales representative completes the sales plan stages. Users with appropriate security can manually select the current stage from the drop-down list. The current stage is updated as follows:

- If a sales plan has been specified but none of the activities has a start date, the Current Stage ID is blank.

- If a sales plan activity has been started, the Current Stage ID is changed to the sales stage associated with the activity. The sales stage with the latest start date is used.
- If a sales plan activity has been started and completed, the Current Stage ID is the sales stage associated with the completed activity.
- If the opportunity status has been set to Closed or Lost, the Current Stage ID is blank.

The Pipeline Charts feature uses this field to produce pipeline charts for opportunities. See “Accessing Pipeline Charts,” on page 7–17.

Status – Click the drop-down list to select the status of the Opportunity. Choose from Inactive, Open, Won, Lost and Closed.

If the opportunity is won and the account you selected on the record is classified as a lead, the system asks if you would like to change the lead to an account. If you select Yes, the system clears the Is Lead check box on the Account record, and the lead becomes an account. If you select No, the system does not change the Is Lead check box.

Close – The date the opportunity is completed or closed.

Product – Click the drop-down list to specify a product from the list. The product field indicates the type of product the customer is interested in purchasing.

Create products in VISUAL.

Opty Type – Click the drop-down list to specify a user-defined type from the list. Opportunity Types can be used for categorizing your opportunities.

Create opportunity types in **Tools > Maintain > General Codes** from the main menu.

Lead Source – Click the drop-down list to select the leading source of the opportunity. Lead Sources indicate how the customer came to know about your company. Lead Sources are user-defined in **Tools > Maintain > General Codes** from the main menu.

Forecast – Select the Forecast box to include forecasting results for the selected opportunity in custom reports.

The forecast amount is automatically calculated by multiplying the opportunity amount by the probability. The forecast amount is displayed beside the **Forecast** check box.

3 Click the **Save** toolbar button, or select **File, Save** from the main menu, to save your additions.

Entering Information in the Details Tab

Use the Details tab to list currency and location information about the opportunity.

Click the **Details** tab.

Enter this information on the Details tab:

Currency – Click the drop-down list to select the currency to use to express the monetary values in this opportunity. You can select any currency used by the parent entity of the Site ID in the General tab.

Territory – The sales territory where the account holder is located. Click the browse button to choose from a list of territories.

Division/Business Unit/Branch – The Division, Business Unit, and Branch of the opportunity. These fields allow you to categorize your opportunities, and are also tied in with the Pipeline charts, Sales Plans, and Quotas. Click the drop-down list to choose from a list of Divisions, Business Units, and Branches.

You can create divisions, business units, and branches by selecting **Tools > Maintain > General Codes** from the main menu.

Owner – Click the **Owner** browse and select a user for this opportunity. The Owner browse lists users assigned to the site selected in the General tab.

Entering Information in the Sales Plan Tab

The Sales Plan tab allows you to track the progress of an opportunity using the various activities of a specified sales plan. In addition to assigning a sales plan to the selected opportunity, you can edit and add activities in this tab as well.

You have the option to create a task when a sales plan is complete. See “Maintaining Sales Options,” on page 3–44.

Sales plan information is also used to create pipeline charts. See “Accessing Pipeline Charts,” on page 7–17.

1 Click the **Sales Plan** tab.
2 Click the drop-down list beside the Sales Plan field to select a sales plan.

   Create sales plans in the Sales Plans feature under in Sales module on the navigation bar.

   The stages and activities of the selected sales plan appear, with the Scheduled Complete Dates.

   The selected sales plan forecasts the estimated finish date of the sales plan in the **Scheduled Complete Date** column based on the current system date when the opportunity was created. The number of days for completing each activity is defined in the **Sales Plans** feature on the navigation bar, and is used in the calculation for the **Scheduled Complete Date** column.
3 Click any cell under the **Activity** column to edit any of the activities of the sales plan for the selected opportunity.
4 Click any cell under the **Scheduled Complete Date** column to edit estimated dates of completion.

   If you edit any of the schedule complete dates then save those changes, you have the option, a dialog is displayed, to adjust all of the subsequent dates within the selected sales plan.
5 Click the appropriate cell under the **Actual Start Date** column to specify the date you started on the sales plan activity.

   The Current Stage field on the General tab will automatically update the stage when you specify each date. The Current Stage field enters the latest stage that includes a date.
6 Click the appropriate cell under the remaining columns. Select from the **Actual Complete Date**, and **Comments** columns to specify completion dates for activities and comments.

Adding an Activity to a Sales Plan

1 To add an activity to the selected sales plan, click the **Add Activity** button beside the Sales Plan field.

The Add New Activity to Opportunity dialog not only allows you to add additional activities to the selected sales plan, but allows you to change the scheduled completion date, adjust or not adjust subsequent dates, and create a task for the selected activity.

The Sales Plan Template, as a default, provides you with all the activities entered in the Sales Plan for the selected Sales Plan. This may include activities that are assigned to the sales plan, but not visible when a sales plan is added to an opportunity. The Key, located below the Sales Plan Templates section, indicates in blue which activities are already used in the selected sales plan, and in black which activities exist but are not visible. This template can also be used to view all activities within all sales plans, allowing you to select an activity that is used within another sales plan. These activities are colored in red. Selecting an existing activity saves time and entry error.

2 To view or select an activity that is not in the current sales plan, select the **Show Activities from All Templates** check box.

3 To add an existing activity, select the activity from the Sales Plan Template. Skip to step 11.

The Stage and Activity fields are automatically populated.

4 To create and add an activity that does not already exist in the Sales Plans, click the **Stage** drop-down list and select a stage for the activity from the list.

5 Type the activity in the Activity field.

6 The Scheduled Complete Data field is automatically populated with current system date. To change the date, click the drop-down list to select a date when this activity should be completed.

The date you specify affects where the activity is displayed in the sales plan. The new activities are placed by date starting with the earliest dates, regardless of the stage you entered.

7 By default, the Adjust Subsequent Dates check box is selected. This check box allows the calendar completion dates to be adjusted for all activities that follow the selected activity.

If you want the scheduled completion dates to remain as they are without adjustments, select the check box so that the check mark is removed.

8 To automatically create a task for this activity, select the **Create Task** check box.

A task is automatically created using Activity name as the Subject of the task. A statement is also entered in the Comments field of the Task that indicates an activity needs to be completed. The task also automatically is displayed in the Tasks pad of the Calendar feature.

9 Click the **Add to Opportunity Plan** button to add the selected activity to the current sales plan.

10 To add other activities to the selected sales plan, repeat steps 7 through 15.

11 When you are finished adding activities to the sales plan, click **Close** to return to the Opportunity detail window.

12 To delete a sales activity, select the activity you want to delete, then right-click your mouse and select **Delete Record** from the menu.

With the deleted record selected, you can undelete the record by right-clicking your mouse on the record and selecting **Delete Record** from the menu.

To permanently save your changes, click the **Save** toolbar button.

13 Click the **Save** toolbar button, or select **File, Save** from the main menu to save your additions.

Entering Information in the Results Tab

Use the Results tab to report sales outcome for the opportunity.

1 Click the **Results** tab.

2 If the sale is won, specify the appropriate values in the **Won** section of the Results tab.

Amount – Specify the monetary amount of the opportunity in the Amount field.

Reason – Select the reason why the opportunity was won. Create reasons in **Tools > Maintain > General Codes** from the main menu.

3 If the sale is lost, specify the appropriate information in the **Lost** section of the Results tab.

Amount – Specify the monetary amount purchased from a competitor for the opportunity.

Reason – Click the drop-down list and select one of the reasons why the opportunity was lost. Create Reasons from the main menu in **Tools > Maintain > General Codes**.

Competitor – Click the browse button to select the competitor that won the opportunity. Create Competitors in the **Competitors** feature under Sales on the navigation bar.

4 If the sale is inactive, specify the following information in the **Inactive** section of the Results tab.

Amount – Specify the monetary amount of the original opportunity that was neither won nor lost.

Reason – Select the reason why the opportunity is inactive. Create Reasons from the main menu in **Tools > Maintain > General Codes**.

5 Enter additional comments for the results in the Results Comments field.

6 Click the **Save** toolbar button after you finish entering the necessary information in the Results tab.

Entering Information in the User Tab

The User tab allows you to include additional information about your opportunities. Create fields in the Navigation Bar in **Admin > User Defined Fields** main menu. If you set up user-defined fields for opportunities, specify the required information.

Editing Opportunities

After you save an opportunity, you cannot edt the Site ID.

1 With the appropriate opportunity selected in the Opportunities grid, click the **Toggle** button at the top left of the grid. You can also double-click the selected opportunity.

2 Edit the selected opportunity.

3 Click the **Save** toolbar button after you are finished editing.

4 To return to the Opportunities/My Opportunities grid, click the **Toggle** button, or click the **Opportunities/My Opportunities** button on the navigation bar.

Deleting/Undeleting Opportunities

1 With the appropriate opportunity selected in the Opportunities grid, click the **Delete** toolbar button, or select **Edit, Delete Record(s)** from the main menu.

You can also right-click the selected opportunity and select **Delete Record(s)** from the main menu.

If you setup CRM to prompt you when deleting records, the Record Deletion dialog is displayed.

2 Click **Yes** to delete the opportunity, or **No** to cancel the deletion.

3 With the deleted record selected, you can undelete the record as long as you have not saved the record. To do so, click the **Delete** toolbar button again, or select **Edit, Undelete Record(s)** from the main menu.

4 To permanently save your changes, click the **Save** toolbar button, or click **Yes** when exiting the grid.

Flagging Opportunities

You are reminded to follow-up on an opportunity at a specified date when you flag an opportunity by placing a red flag beside opportunities in all Opportunity grid.

1 With the appropriate opportunity selected, click the **Flag** toolbar button, or right-click within the Opportunities grid and select **Flag for Follow-up** from the menu.

2 In the dialog, click the drop-down list beside the Flag To field to choose the type of follow-up for this opportunity. Select from **Follow-up**, **Call**, **Arrange Meeting**, **E-mail**, or **Send Letter**.

3 Click the drop-down list beside the Due By field to choose a date to follow-up on this opportunity, or specify the date in Windows format.

4 Check the **Completed** check box when the follow-up has been completed.

5 To take a follow-up flag off an opportunity, click the **Clear Flag** button.

6 After you specify all information, click **OK** to save changes, or **Cancel** to return to the previous grid without saving changes.

Printing and Exporting Opportunities

There are several options to print and export Opportunity information in CRM. Refer to the following chapters for additional information:

- To print a report on all Opportunity records in the Opportunities grid, refer to “Printing All Records in a Grid” on page 4–22.
- To print a report on a specific Opportunity record, refer to “Printing a Specific Record” on page 4–22.
- To print preloaded and user-defined reports, refer to “Using the Reports Menu Option” on page 4–24.
- To export the Opportunities grid or a specific record within the Opportunities grid and save it in a specified format, refer to “Exporting Grid Contents” on page 3–25.

Using the Pipeline Charts Feature

The pipeline chart is a graphical comparison of accumulated opportunity and quota amounts. The Pipeline Chart feature uses information from the Quotas table and the Opportunities table.

The pipeline chart report displays prior and current selected periods with completed and currently active activities. Monetary values display in the appropriate buckets as follows:

The most current activity based on the sales plan template within the sales plan that has an actual start date and an actual complete date within the selected period.

OR

The most current activity based on the sales plan template that has an actual start date on or before the selected period and the actual complete date is Null.

Pipeline charts report display future periods with the following monetary values:

The most current activity based on the sales plan template that has an actual start date on or before the selected period and the actual complete date is Null.

Pipeline charts vary based on the options you select in the Sales Pipeline Chart window.

Accessing Pipeline Charts

1 Expand the Sales module by clicking the **+** button in the navigation bar beside Sales.

2 Click the **Pipeline Charts** button.

For each sales stage, the Pipeline chart produces a graphic percentage by dividing the total dollar amount of each opportunity (A) within the stage, by the total quota amount entered in the Sales Quotas window (Q).

The color key in the lower right window, which fills each stage of the pipeline chart, indicates whether the sales rep, and/or location is within a certain percentage of meeting the specified quota.

The Sales Stages section in the top left of the window lists the quota criteria using the color key for each sales stage in the sales plan.

3 Enter the following information to view a selected pipeline chart.

Sales Pipeline for – Click the drop-down list to choose the sales pipeline chart for **All**, **Sales Rep**, **Territory**, **Business Unit**, **Division**, or **Branch**.

Sales Rep/Territory/Business Unit/Division/Branch – Depending on your selection in the Sales Pipeline For field, this field can be one of five titles, each with a different list to choose from. Click the drop-down list and make the appropriate selection.

Site ID – If you use multiple sites, click the drop-down button to choose the site whose opportunities you want to compare to the quotas. You can choose from any of your allowable sites. If you use a single site, the ID of your single site is used.

Year – Click the drop-down list to choose a year for the pipeline chart.

Quarter – Click the drop-down list to choose the sales quarter for the pipeline chart, if necessary.

Month – Click the drop-down list to choose the sales month for the pipeline chart, if applicable. The month overrides information selected in the Quarter field.

4 Click the **Update Chart** button to view the latest changes in the pipeline chart.

5 Click the **Print** button to print the pipeline chart.

6 To exit the Sales Pipeline Chart window, click the **Close** (x) button in the top right corner of the window.

Using the Quotes Feature

A Quote is a price estimate given to an account for goods or services. The Quotes grids track the details of a quotation, including product selection, configuration, and price.

Use the Quotes feature to create, maintain and print quotes, add product and configuration line items to each quote, and convert a quote to an estimate or an order in the VISUAL database. You can also flag quotes for follow-up.

You can set an expiration date for new quotes so when quotes reach a certain amount of days without being converted to an estimate or order, they are automatically deleted from the Quotes grid. For more information on setting defaults, refer to “Using the Defaults Feature,” on page 13–3.

The Quotes grid includes all quotes entered within your allowable sites. The My Quotes grid includes only the quotes you enter. The Line Items grid lists all line items entered on all quotes and lets you launch the Parts Browser.

Accessing the Quotes Grid

Expand the Sales module by clicking the **+** button beside Sales on the navigation bar, then click the **+** button beside the Quotes feature.

Click the **Quotes** or **My Quotes** button.

The Quotes grid displays only quotes associated with your allowable sites and lists basic information about each quote. You can change the way you view information in this grid by using the filter options or customizing columns. See “CRM Grids,” on page 3–22.

The Option bar at the top of the Quotes grid allows you to create and maintain records associated with the selected quote. The Quotes Option bar includes **Line Items**, **History**, **Tasks**, **Contacts**, **Estimates**, **Orders** and any applications you assigned from the App Builder module.

For information on the Line Items option button, see “Adding Line Items to a Quote,” on page 7–22. For all other option buttons, see “Using the Option Bar,” on page 3–39.

Adding Quotes

Click the **New** toolbar button, or right-click in the Quote grid and select **New Record** from the menu.

Specify this information in the New Quote window:

Quote ID – You cannot edit this field. A system-assigned number that uniquely identifies the quote.

Description – Type a description of the new quote in the field provided.

If you are assigning an opportunity to this quote, the Description field automatically populates with the Description of the opportunity.

Refer to the following tabs to specify information in the New Quote window.

Entering Information in the Quote Tab

The Quote tab includes basic information about the quote, including Site ID, Account ID, Sales Rep ID, pricing, status, and effective dates.

1 Click the **Quote** tab, if necessary, to view the Quote tab information.

2 Specify this information on the Quote tab:

Site ID – If you use multiple sites, click the **Site ID** arrow and select the site to use for this quote. You can choose from any of your allowable sites. If you use a single site, the ID of your single site is inserted.

Account – Click the **Browse** button to choose the account for whom you are preparing this quote.

After you select an account, click the **View Detail** button to view account detail in the bottom pane. You must click the **Save** toolbar button before viewing the account detail window.

Opportunity – If you created an opportunity for this quote, click the **Browse** button to automatically specify opportunity information for the new quote. The Opportunity browse only displays opportunities from the site you selected in the Site ID field.

After you select an opportunity, click the **View Detail** button to view opportunity detail in the bottom pane. You must click the **Save** toolbar button before viewing the account detail window.

Sales Rep – Click the **Sales Rep** button to choose a sales rep for this quote. If you are using Infor VISUAL 10.0.0 or higher, the browse shows active sales reps only.

Commission % – Specify a default commission percentage if you want to apply a commission percentage to line item amounts added to this quote. Default Commission percentages appear in the **Commission %** column of line items.

Effective - Click the drop-down list to select a date range when the quote is effective.

Expires – If you want the quote to expire in a specific number of days, you can select the expires date, and then type the number of days in the expires **in** field.

Desired Ship – Select the date on which shipment to customer is most ideal.

Leadtime – Type the total number of days from the beginning of the quote that the order is expected to ship.

Comments – Type any comments related to this quote in the text box provided.

Status – Click the drop-down list to select the status of the quote. Choose from **Open** or **Closed**.

Type – Click the drop-down list to select the type of quote. Create quote types from the main menu in **Tools > Maintain > General Codes**. Quote types are used to categorize your quotes. You can sort and filter specific quotes based on your types within the Quotes grid.

Margin – Click the drop-down list to choose a percentage of the gross margin. The total price is multiplied by the gross margin percentage, and updates the gross margin dollar amount in the Margin Amt field.

Margin Amt – Displays the gross margin dollar amount, as determined by the margin percentage you select in the Margin field.

Quote Amt – Displays the total amount of the quote.

3 Click the **Save** toolbar button to save your additions.

Entering Information in the Address Tab

The Address tab includes the sold-to and ship-to address of the customer, as well as other general information.

1 Click the **Address** tab.

2 Refer to the following information in the Address tab.

Sold-To Address – This field displays the sold-to address of the account you selected in the Quote tab. Click the browse button to choose a sold-to address for the selected account.

Ship-To Address – If the sold-to address is the same as the ship-to address, you do not have to specify a ship-to address.

If the ship-to address is different than the sold to address, click the **Ship-To Address** browse button to choose a ship-to address for the selected account.

3 Click the **Save** toolbar button.

Entering Information in the Details Tab

The Details tab includes the shipping and billing address of the customer, and terms of payment, as well as other general information.

1 Click the **Details** tab.

2 Refer to the following information in the Details tab.

Terms – Click the **Terms** button to select the payment and discount terms that apply to this quote. Create terms in the Terms Maintenance dialog in VISUAL's Application Global Maintenance. If you use VISUAL Financials Global Edition for .NET, create terms in VISUAL Financials Global Edition Terms Rule Maintenance.

Currency – Click the drop-down list to select the type of currency of the monetary values expressed in this quote. You can select any currency used by the parent entity of the Site ID in the General tab.

Ship Via – Click the drop-down list to choose the type of shipping method when shipping products to this account.

Maintain Ship Via codes in the Application Global Maintenance window of VISUAL.

FOB – Click the drop-down list to choose from a list of Free on Board codes. This field defaults to the associated account's Free on Board entry.

Free on Board codes determine at what point in the shipping process the customer must take responsibility for shipping fees for the goods your company is shipping. Maintain Free on Board codes in VISUAL.

Owner – Click the Owner browse button and assign a user to this quote. The Owner browse is filtered by the site selected on the General tab.

Discount – Click on the drop-down list to apply existing user-defined discounts to the account.

Discount Codes rapidly assign a preset discount rate for a customer. Maintain discount codes in *VISUAL.*

Tax Group ID – Click the **Tax Group ID** button to choose the type of sales tax group for this account on the selected quote.

Territory – The sales territory where the company is located. Click the **Territory** button to choose from a list of territories.

Create territories in the **Tools > Maintain > General Codes** main menu.

Division/Business Unit/Branch – The Division, Business Unit, and Branch of the selected account. Use these fields to categorize your quotes. Click the drop-down list to choose from a list of Divisions, Business Units, and Branches.

Create divisions, business units, or branches in the **Tools > Maintain > General Codes** main menu.

Note: The Locked by field is reserved for future use.

3 Click **OK** when you are finished entering information in the Terms window.

4 Click the **Save** toolbar button, or select **File, Save** from the main menu to save your additions.

Entering Information in the User Tab

The **User** tab allows you to create additional user-defined information to your quotes. Create fields for the User tab in the Navigation bar in **Admin > User Defined Fields**. If you create user-defined fields for quotes, specify the required information in the User tab.

Adding Line Items to a Quote

Each line item you create is associated with a specific quote which can contain an VISUAL part, an MPC Configurator configuration, or a general description.

You must have MPC, Experlogix's Master Product Configurator, loaded on your system in order to access configuration options. The Master Product Configurator with Parametric Engineering (MPC-PE) enables you to create and apply custom designed products and accessories that comply with your specifications for customer quotes and orders. For up-to-date information on which version of MPC is supported, refer to the Infor VISUAL Compatibility Matrix document available in the Documentation section of Infor Xtreme.

In order for the MPC to function, you must apply settings in the Configurator tab of the Sales Options window. See "Maintaining Sales Options," on page 3–44.

The Line Items pane can also be customized. Right-click your mouse within the Line Items For pane and select **Columns > Customize** from the menu. See “Changing the Appearance of Grids,” on page 3–24.

Access the Quotes grid by clicking the **+** button beside the Sales module in the navigation bar, then click the **Quotes** button.

Select the appropriate quote, then click the **Line Items** button on the option bar.

In the Line Items for Quote grid, the Part ID browse, Warehouse ID browse, and Service Charge ID browse are filtered by the site selected on the quote.

With each line item, you have the option to add Line Item Comments and Line Item Specifications. Refer to the following to specify comments or specifications to a line item.

Note: “Comments for line” and “Specs for line” are not available until a line item is entered, saved, and selected.

Comments for line – Select the line item, then specify the comments that pertain to the line item you selected in the text box at the bottom of the pane.

Specs for line – Select the line item then click the **Line Item Specs** button to specify specification for the selected line item.

Refer to the following information when adding an VISUAL part, configuration, or a general description to each line item.

Adding VISUAL Parts

1 To add an VISUAL part to a line item, click the appropriate cell under the **Part ID** column.

2 Click the browse button to select a part from the list. The Part ID browse is filtered by the site selected on the Quote header. If you use Infor VISUAL 10.0.0 or higher, then the part ID browse is also filtered to show active parts that can be used in sales transactions.

3 Specify this information:

   Line – You cannot edit this column. Indicates the number of line items in consecutive order.

   Series – This field is available only if you are adding a configured part with MPC.

   Model – This field is available only if you are adding a configured part with MPC.

   Part ID – The Part ID column includes the part identification when an VISUAL part is selected.

   Description – The name of the selected part, configuration, or general description.

   Warehouse ID – Click the browse button to select a Warehouse ID from the list.The look up is filtered by the Site ID in the quote header.

   Location ID – Specify a location for the part.

   # Pieces – If this quote is for a piece tracked part, specify the number of pieces. You must use Infor VISUAL 7.1.1 or above to place a quote for dimensional inventory.

Length, Width, Height – If this quote is for a piece tracked part, specify the dimensions of the part. The dimensions you are required to specify are determined in Part Maintenance in VISUAL. You must use Infor VISUAL 7.1.1 or above to place a quote for dimensional inventory.

Dimension UM – If this quote is for a piece tracked part, the dimension unit of measure defined in Part Maintenance in VISUAL is inserted. You cannot edit this field. You must use Infor VISUAL 7.1.1 or above to place a quote for dimensional inventory.

Unit Price – The unit price is calculated using an algorithm similar to that used for unit pricing in VISUAL's Customer Order Entry. After the unit price is calculated you can click the appropriate cell under the Unit Price column to modify the unit price of the product.

Qty – Click the appropriate cell under the **Qty** column to specify a quantity to order for this product, or configuration.

Disc% – To assign a percentage discount on the price of the product, click the appropriate **Discount** column and specify the percentage of the discount.

Extension – You cannot edit this field. This column is automatically populated when the price and quantity are selected. The extension price is a calculation of the unit price multiplied by the quantity. If a discount is applied, this will alter the extension price as well.

Freight – To charge freight for the line item, click the appropriate cell under the **Freight** column and specify the freight price.

Tax – You cannot edit this field. The **Tax** column is automatically populated when a tax group is selected for the **Sls Tax Grp** column.

Total Price – You cannot edit this field. The **Total Price** column is automatically populated by adding the extension, freight, and tax.

Delivery – This is a user-defined column. Specify the necessary information in the cell, if appropriate.

Sls Tax Grp – The system inserts a Sales Tax Group ID based on the following hierarchy:

If a sales tax group has been assigned to a particular Part ID/Customer ID/Ship to ID combination on the quote line or service line, the system uses this tax group. This value is defined in Sales Tax Group by Part ID dialog in Part Maintenance.

If the Part ID/Customer ID/Ship to ID sales tax group value is not defined, the system uses the sales tax group that has been assigned to a particular Part ID/Customer ID combination. This value is defined in Sales Tax Group by Part ID dialog.

If the Part ID/Customer ID sales tax group value is not defined, the system uses the sales tax group that has been assigned to the part. This value is defined on the Accounting tab in Part Maintenance.

If the default sales tax group has not been assigned in Part Maintenance, the system uses the Sales Tax Group ID defined for the Customer ID/Ship to ID combination. This value is defined in the Shipping Addresses dialog in Customer Maintenance.

If the Customer ID/Ship to ID sales tax group value is not defined, the system uses the default sales tax group defined on the customer record. This value is defined on the Accounting tab in Customer Maintenance.

Commission % – Click the appropriate cell under the **Commission %** column to specify a commission percentage.

If you entered a default commission percentage in the Quote, this field is automatically populated with your entry.

Promise Date – The date you promised to ship or deliver the goods ordered. Click the appropriate cell under the **Promise Date** column and click the browse button to select a date from the calendar.

4 Click the **Save** toolbar button to save additions.

Adding Configurations

To add configurations, you must have the MPC Configurator installed on your system.

1 To add a configuration to a line item, click the appropriate cell in the **Series** column.

You can also right-click within the Line Items for Quote pane and select **New Configuration** from the menu.

2 Click the browse button to open the MPC – Select Model to Configure window.

Models of configurations within a specified series appear to the left of the window, while the right side displays a picture of the selected configuration model.

3 Click the drop-down list in the **Select a Series** section to choose a configuration series.

4 Select the Model you want to add to the line item, then click **OK**.

Refer to your Master Product Configurator documentation for more information on using the configurator.

5 When you are finished entering the necessary information in the Parametric Configurator, click **OK** to add your configuration selection to the quote line item.

6 Specify any other necessary information in the selected quote line item. See “Adding VISUAL Parts,” on page 7–23.

7 Click the **Save** toolbar button when you are finished with the selected quote line item.

Adding General Descriptions

1 To add a general description to a line item, click the appropriate cell in the **Description** column.

2 Specify the necessary information in the **Description** column, then specify additional information about the part such as price, quantity and tax.

3 Click the **Save** toolbar button to save your additions.

Using Insert Line Above or Insert Line Below Options

You can use this feature only if the quote contains no MPC items. If the quote contains MPC items, the system disables the Insert Line Above and Insert Line Below menu items.

You can insert new quote line items one line above or below current line items. When you insert a line, the system renumbers the existing line items as necessary.

To use this feature:

1 Select the appropriate line.

2 Right-click in the grid and select one of the following options:

Insert Line Above – Select this option if you would like to insert a new item above the line you selected.

Insert Line Below – Select this option if you would like to insert a new line item below the line you selected.

3 To complete the new line item, refer to “Adding Line Items to a Quote,” on page 7–22.

Viewing and Editing Line Items on Quotes

Select the appropriate line item in the Line Items for Quote bottom pane.

You can edit an VISUAL part, configuration, or a general description, and view a configuration. Refer to the following for more information.

Editing VISUAL Parts

To replace the current part with another, refer to “Adding VISUAL Parts”.

To edit part information, click the appropriate cell in the line item and specify the necessary information. You can edit any cells that are not shaded in gray.

Click the **Save** toolbar button, or click **Yes** when exiting the pane to save your changes.

Editing Configurations

1 With the Line Items for Quote pane active, right-click the line item that contains the configuration you want to edit.

2 Select **Edit Configuration** from the menu to make changes to your configuration, or **Copy Configuration** to copy the configuration in the next available line item.

3 Refer to your Parametric Configurator documentation for more information on editing your configuration.

4 If necessary, edit other columns within the quote line item. For more information on the columns, refer to “Adding VISUAL Parts” on page 7–23.

5 Click the **Save** toolbar button, or select the **Yes** button when exiting the pane to save your changes.

Editing General Descriptions

Click the appropriate cell and specify the necessary information.

You can edit any cells that are not shaded in gray such as unit price, quantity, and discount percentage.

Click the **Save** toolbar button, or select **Yes** when exiting the pane to save your changes.

Viewing Configurations

With the appropriate line item selected, right-click within the Line Items for Quote pane and select **View Configuration** from the menu.

The line items window includes all products associated with the selected line item.

You can view other configuration line items within the selected quote by clicking the **Previous** or **Next** button, and view line item details using the **Show Details** button. You also have the option to print the selected line items details by clicking the **Print** button.

Refer to your Master Product Configurator documentation for more information.

Click the **Close** button.

Viewing and Entering Information in the Parts Browser

The Parts Browser allows you to access detailed part information within one window. This window is also available from the Parts window and the Part ID button on the Calls window.

You have the option to customize most columns in the Parts Browser window. For more information on customizing columns, refer to “Customizing Columns” on page 3–31.

1 Right-click your mouse on the part line item you want to view, then select **Parts Browser** from the menu.

   The Site ID and Part ID from the quote line are inserted. You can change either value. The information displayed in the Parts Browser displayed information related to the selected site only. For example, only the orders created in the selected site are shown in Orders History.

   The Parts Browser window contains quantity break (Retail, Wholesale, User Quantity, and User Price), customer order history for the selected part, and purchase history information for the selected part and site, as well as inventory, back orders, delivery and substitute part information.

Add price break quantities for a selected quote, and assign price break quantities automatically from the Parts Browser.

The unit price of the part, product code and commodity code are supplied in the Part Details window.

2 To view price breaks for a different customer, click the **Customer** button beside the Customer field and select a customer from the list.

Refer to "Adding and Assigning Price Break Quantities" on page 7–29.

3 The **Order History** section includes all orders from all warehouses in the selected site for the selected part. This selection can be specific by clicking the **Warehouse** button (browse button) beside the Warehouse field and selecting a warehouse. Click the **All** button to select all order history information.

The Gross Percentage column (**GP%**) is determined from the actual sales price and the inventory transaction table that provides the actual cost for a given transaction.

4 To access the VISUAL Order Inquiry and Invoice windows, select the order history line item you want to view in the Parts Browser window, then right-click your mouse and select either the **Order Inquiry Window** or the **Invoice Window** from the menu.

5 If an order contained multiple shipments, select the **Expand Multiple Shipments** check box to view additional shipments.

6 To view shipments from only the customer displayed in the Customer field, select the **Specified Customer Only** check box.

The Purchase History section includes all customers from all warehouses that purchased the selected part.

7 To view purchase history from a specific warehouse, click the **Browse** button beside the Warehouse field and select the warehouse from the list.

8 Select the **Expand Multiple Receipts** check box to view additional receipt items if the customer received multiple shipments for an order.

9 To access the VISUAL Purchase Order Entry and Invoice Entry windows, select the purchase order line item in the Parts Browser window, then right-click your mouse and select either **Purchase Order Entry** or **AP Window** (Invoice Entry window) from the menu.

10 Click the **Stock** tab.

The Stock tab contains four parts: General Information, Part Inventory, Back Orders, and Delivery. Each part is described in the steps below. The user defined fields for the part are supplied in the Stock tab.

11 The Substitute field allows you to replace the selected part with a substitute part. The Up-sell box allows you to view suggested up-sell parts.

12 View the current part inventory for the part from each warehouse in the **Inventory** section.

13 View back order information for the part from all warehouses in the **Back Orders** section.

To view back orders from a specific warehouse, click the **Browse** button and select the warehouse from the list.

14 View delivery information for the part from the **Delivery** section.

To view delivery information from a specific warehouse, click the **Browse** button and select the warehouse from the list.

15 To return to the Quote and Quote Line Items panes, click the **Close** button.

Adding and Assigning Price Break Quantities

Note: You can only add and assign price break quantities to selected quote line items. Accessing the Parts Browser from the Part window or the Call detail window will not allow you this option.

Enter price break quantities and prices for the selected part and customer in the last two rows of the Quantity Breaks table, entitled **User Qty** and **User Price**.

1. Click the **10** column in the **User Qty** row and specify the first quantity break for the part.
2. Continue adding the quantity of the part in the remaining columns, if necessary, by pressing the **Tab** key and entering the quantity.
3. In the **User Price** row, click the **10** column (directly beneath the first quantity you entered), then specify the unit price of the part when ordered in the quantity you specified in the **User Qty/10** cell.
4. Continue entering the price break amounts for each quantity you entered.
5. If you want to assign price breaks to the selected quote, find the price break you want to add, then right-click the price. You can also assign price and quantity breaks from the Order History section.

   A menu opens that contains the quantity and amount of the selected price break.
6. Select the menu option to automatically change the quantity and price of the selected quote line item.

   From the quote line item, you can manually change the quantity and/or price if necessary.
7. Click the **Return to Quote** button to return to the Quote line items.

Selecting Substitute Parts

1. With the line item selected, right-click your mouse and select **Parts Browser** from the menu.
2. Click the **Stock** tab.
3. Click the **Substitute** drop-down list to select a substitute part.
4. Substitute parts must be added in VISUAL.
5. Click the **Switch** button to replace the selected part with the substitute part.
6. Select the **Sales** tab.
7. Specify the number of parts you want to order in the User Qty cell under the **Units** column.
8. Specify the price per part in the User Price cell under the **Units** column.
9. If you want to establish quantity discounts for this part, specify the quantity and price per each quantity ordered.

The column headers show the quantity breaks you assigned to parts in VISUAL.

10 Click **Close** to exit the Part Details window.

The part is replaced with the substitute part for the selected line item.

Deleting/Undeleting Line Items on a Quote

1 Select the appropriate line item in the Line Items for Quotes pane.

2 Right-click the line item you want to delete and select **Delete** from the menu.

Note: The **Delete** toolbar button and the **Edit**, **Delete Record(s)** main menu selection deletes the selected quote, not the line item.

3 With the deleted line item selected, you can undelete the record (as long as the record has not been saved) by right-clicking the appropriate line item and selecting **Undelete** from the menu.

4 To permanently save your changes, click the **Save** toolbar button, or click **Yes** when exiting the pane.

Editing Quotes

After you save a quote, you cannot edit the Site ID.

1 With the appropriate quote selected, click the **Toggle** button at the upper left side of the grid. You can also double-click the selected quote.

2 Refer to the field definitions and instructions in “Adding Quotes” in this section to edit the selected quote.

3 Click the **Save** toolbar button after you are finished editing.

4 To return to the Quotes/My Quotes grid, click the **Toggle** button, or click the **Quotes/My Quotes** button on the navigation bar.

Copying Quotes

The Copy Quotes function allows you to copy all the information in a selected quote, reducing entry time and errors when creating repeat or similar quotes.

1 From the Quotes grid, select the quote you want to copy.

2 Click the **Copy Quote** toolbar button, or right-click your mouse and select **Copy Quote** from the menu.

You can also select **Edit**, **Copy Quote** from the main menu.

3 In the dialog, click **Yes** to copy the selected quote, or **No** to exit this dialog without copying the selected quote.

If you clicked **Yes**, the quote is copied to the Quotes grid and a new Quote ID number is assigned.

4 Click **OK** to return to the Quotes grid.

Use the procedures and definitions in “Adding a Quote” to edit the copied quote.

Deleting/Undeleting Quotes

1 With the appropriate quote selected in the Quotes grid, click the **Delete** toolbar button, or select **Edit**, **Delete Record(s)** from the main menu.

You can also right-click the quote you want to delete and select **Delete Record(s)** from the menu.

If you set up CRM to prompt you when deleting records, click **Yes** to delete the call, or **No** to cancel the deletion in the Record Deletion dialog.

2 Click **Yes** to delete the quote, or **No** to cancel the deletion.

3 With the deleted quote selected, you can undelete the record by clicking the **Delete** toolbar button (as long as you have not saved the record), or select **Edit**, **Undelete Record(s)** from the main menu.

4 To permanently save your changes, click the **Save** toolbar button, or click **Yes** when exiting the grid.

Flagging Quotes

You are reminded to follow-up on a quote at a specified date when you flag a quote. Flagged quotes contain a red flag in all Quotes grids.

1 With the appropriate quote selected in the Quotes grid, click the **Flag** toolbar button, or right-click the appropriate quote and select **Flag for Follow-up** from the menu.

2 Click on the drop-down list beside the Flag To field to choose the type of follow-up for this quote. Select from **Follow-up**, **Call**, **Arrange Meeting**, **E-mail**, or **Send Letter**.

3 Click on the drop-down list beside the Due By field to choose a date to follow-up on this quote, or specify the date in Windows format.

If you do not want to be automatically reminded of this follow-up on a certain date, click the drop-down list and click the **None** button.

4 Check the **Completed** check box when the follow-up is complete.

5 To take a follow-up flag off a quote, click the **Clear Flag** button.

6 After you specify all information, click **OK** to save changes, or **Cancel** to return to the previous grid or window without saving changes.

Printing Quotes

You can print the Quotes grid, a selected quote with its associated line items, tasks, and notes using the Reports menu option. You can create your own reports using the Reports feature under Admin in the navigation bar. All reports for quotes appear in the Reports menu. Refer to the following report headings to print your quote(s).

Printing the Quotes Grid

All columns in the Quotes grid are printed as they appear on your monitor.

1 Open the Quotes grid by clicking the **Quotes** button in Sales module on the navigation bar.

2 Click the **Print** toolbar button, or select **File**, **Print** from the main menu.

3 In the Page Setup dialog, make any necessary changes to the paper, orientation, margins, or printer, then select **OK** to print the report, or **Cancel** to return to the Quotes grid without printing the report.

4 In the Print dialog, make any necessary changes to the printer, print range, or number of copies, then click **OK** to print the report.

Printing the Quote Detail Report

The Quote Detail report prints the selected quote and its associated line items, tasks, notes, contacts, orders, and estimates. The Quote Detail report offers the option to view the report before outputting it to a printer.

1 Select the quote you want to print from the Quotes grid.

2 Select **Reports**, **Quote Detail** from the main menu.

Using the print preview window, you can print and export the report, and navigate within the report. For more information on the print preview window, refer to “Using the Print Preview Window,” on page 4–24.

3 To exit the report and return to the Quotes grid, click the **Close** button.

Converting a Quote

You can convert a quote to an estimate or an order depending on your company needs. Both conversions add the quote information to the VISUAL database. When you convert a quote to an estimate, you have the option to add costing and quantity break functionality that can only be applied to quotes in VISUAL. You can skip the estimate process if your quote doesn’t need costing or quantity break functionality by converting your quote to an order.

When you convert a quote to an estimate or order, the ID of the new estimate or order is generated based on Infor VISUAL auto-numbering settings. The ID of the CRM quote is not used. You can view links between CRM quotes, VISUAL estimates, VISUAL orders in CRM.

If you use VISUAL 10.0.0 or higher, you cannot convert a quote to an estimate or order if the quote contains an inactive part or a part that is not allowed in sales transactions.

Converting a Quote to an Estimate

1. Select the quote you want to convert from the Quotes grid.
2. Select **Actions > Convert Quote to Estimate** from the main menu.
3. In the Convert Quote to Estimate dialog, specify the expiration date by clicking the drop-down list beside the Specify Expiration Date field, then click **OK**.
4. To see the estimate you converted, click the **Estimates** button in the Sales module on the navigation bar. Refer to “Using the Estimates Feature” for instructions on maintaining estimates.

Converting a Quote to an Order

1. Select the quote you want to convert to an order from the Quotes grid.
2. Select **Actions > Convert Quote to Order** from the main menu.
3. In the Convert Quote to Order dialog, click the drop-down list to specify the desired ship date of the products, then specify the Customer PO number in the field below.
4. Click **OK** to continue.

   To see the quote you converted, click the **Orders** button in the Sales module on the navigation bar. Refer to “Using the Orders Feature” for instructions on maintaining orders.

Accessing the Line Items Grid

The Line Items feature lists all line items and line item information associated with a quote. Use the Line Items grid to view line item information, and quote details associated with a specific line item.

The Line Items window is also accessible in the Quotes and Parts grids from the option bar.

1. Expand the Sales module by clicking the **+** button beside Sales in the navigation bar.
2. Click the **+** button beside the Quotes feature, then click the **Line Items** button.

   The Quote Lines grid lists basic information about each line item. You can change the way you view information in this grid by using the filter options and customizing columns. See “Customizing Columns,” on page 3–31.

3 Click any cell under the **Quote ID** column to open the quote for the selected line item in the bottom pane.

Printing and Exporting Quotes

There are several options to print and export Quote information in CRM. Refer to the following chapters for additional information:

- To print a report on a specific Quote record, refer to "Printing a Specific Record" on page 4–22.
- To export the Quotes grid or a specific record within the Quotes grid and save it in a specified format, refer to "Exporting Grid Contents" on page 3–25.

Using the Estimates Feature

Use the Estimates feature to view all estimates in CRM, and create and maintain estimates (referred to as quotes in VISUAL) in the Estimates grid using the VISUAL Estimating window.

Converting your quote to an estimate allows you to add costing information and quantity break functionality using the Estimating window in VISUAL.

The term “estimate” is used to identify those quotes that can be viewed and maintained in VISUAL. The quote you view in the Estimating window in VISUAL can be seen as an estimate in the Estimates grid in CRM. The estimate is distinguished from the quote because the quote in CRM is not accessible in VISUAL, only an estimate can be viewed and maintained in VISUAL.

Accessing the Estimates Grid

Expand the Sales feature by clicking the + button beside Sales in the navigation bar.

Click the **Estimates** button.

The Estimates grid displays only estimates associated with your allowable sites.

You can change the way you view information in this grid by using the filter options. For more information, refer to “CRM Grids” on page 3–22.

From the Estimates grid you can create and maintain estimates by accessing the Estimating Window in VISUAL, and perform a mail merge using the Mail Merge toolbar button. This chapter discusses how to open the window needed to create and maintain estimates. For more information on the Mail Merge feature, refer to “Using Mail Merge,” on page 4–8.

The **Status** column in the Estimates grid indicates the status of the estimate. The following letters correspond to the VISUAL description: **A** = Inhouse, **R** = Ready, **P** = Printed, **W** = Won, **L** = Lost, and **X** = Canceled.

The Option bar at the top of the Estimates grid allows you to create and maintain records associated with the selected estimate. The Estimates Option bar includes **Line Items**, **Opportunities**, **Quotes**, and **Orders**. For more information on accessing options in the Option bar, refer to “Using the Option Bar,” on page 3–39.

Note: You have the option of viewing the Specifications and Notations associated with the VISUAL Manufacturing order header in the grid. Viewing these two columns could result in slower performance when populating the grid. You can customize the layout of this grid to omit the Specifications and Notations columns if performance becomes an issue. See “Customizing Columns,” on page 3–31.

Adding an Estimate/Quote

To add an estimate (in CRM) or quote (VISUAL) from the Estimates grid, you must specify your information in the VISUAL Estimating window. You can create an estimate in CRM by converting a quote to an estimate. See “Using the Quotes Feature”.

1. From the Estimates Grid, click the **New** toolbar button.
2. Enter the estimate in the VISUAL Estimating Window.

   Refer to your *Infor VISUAL User’s Guide* for information on creating a quote.
3. When you are finished with the Estimating window, click the **Save** toolbar button to save your additions.
4. To return to CRM, click the **Close** button or select **File**, **Exit** from the main menu.

Editing Estimates/Quotes

To edit estimates (in CRM) or quotes (in VISUAL), the Estimating window is opened.

1. Select the Estimate you want to edit from the Estimates grid.
2. Click the **Toggle** button located in the top left corner.
3. Edit the necessary information for the selected quote.

   Refer to your *Infor VISUAL User’s Guide* for information on editing quotes.

   When you are finished with the Estimating window, click the **Save** toolbar button to save your edits.

   To return to CRM, click the **Close** button, or select **File**, **Exit** from the main menu.

Accessing Line Items

You can view estimate line items from the Line Items button under Estimates feature. You edit the selected line item or quote from the VISUAL Estimating window, and create a new quote, if necessary.

1. Expand the Sales feature by clicking the **+** button beside Sales in the navigation bar, then click the **+** button beside the Estimates feature.
2. Click the **Line Items** button.

   The Estimate Lines grid lists general information for all estimates in the CRM database.

   You can change the way you view information in this grid by using the filter options. See “Using Advanced Filtering,” on page 3–28.
3. To edit an estimate, click the estimate ID in the **Estimate ID** column and the VISUAL Estimating window is opened.

   Refer to your *Infor VISUAL User’s Guide* for more information on using the Estimating window.

4 Click the account name in the Acct Name column to access details for the account associated with the Estimate in the bottom pane.

Note: You have the option of viewing the Specifications associated with the VISUAL order header in the grid. Viewing this column could result in slower performance when populating the grid. You can customize the layout of this grid to omit the Specifications column if performance becomes an issue. See “Customizing Columns,” on page 3–31.

You can also view the quantity detail information from VISUAL. If you include this column in the grid, click the drop-down button to view the pricing by each quantity break.

Viewing Line Items for an Estimate

1 In the Estimate Lines grid, select the appropriate estimate.

2 On the option bar, click the **Line Items** button.

Note: To customize column layout, right-click your mouse in the “Line Items For Estimate <estimate number>” pane and select **Columns > Customize** from the menu. See "CRM Grids" on page 3–22.

3 Under the **Acct Name** column, click an account name to view more information about that account.

4 Under the **Estimate ID** column, click an Estimate ID to open the Estimating window in VISUAL.

Printing and Exporting Estimates

There are several options to print and export Estimate information in CRM. Refer to the following chapters for additional information:

- To print a report on all Estimate records in the Estimates grid, refer to “Printing All Records in a Grid,” on page 4–22.
- To print preloaded and user-defined reports, refer to “Using the Reports Menu Option,” on page 4–24.
- To export the Estimates grid or a specific record within the Estimates grid and save it in a specified format, refer to “Exporting Grid Contents,” on page 3–25.

Using the Orders Feature

An order is a commitment from a customer to purchase goods or services.The Orders grid lists all orders created in VISUAL within your allowable sites.

Use the Orders grid to view general order information, access the VISUAL Customer Order Entry window to maintain orders, and access quotes, line items, and accounts associated with the selected order in CRM. You can also perform a mail merge using the **Mail Merge** toolbar button. See “Using Mail Merge,” on page 4–8.

Accessing the Orders Grid

Expand the Sales feature by clicking the **+** button beside Sales on the navigation bar, then click the **Orders** button.

The Orders grid displays only orders associated with your allowable sites. You can change the way you view information in this grid by using the filter options. See “Using Filters in Grids,” on page 3–25.

The Option bar at the top of the Orders grid allows you to access the line items and quotes associated with the selected order. See “Using the Option Bar,” on page 3–39.

Note: You have the option of viewing the Specifications and Notations associated with the VISUAL order header in the grid. Viewing these two columns could result in slower performance when populating the grid. You can customize the layout of this grid to omit the Specifications and Notations columns if performance becomes an issue. See “Customizing Columns,” on page 3–31.

Using the Orders Grid

You can use the orders grid to view account details in CRM.

Click any cell in the **Acct Name** column to open the account associated with the order in the bottom pane.

For more information on account details, refer to Chapter 5, “Using the Accounts Feature”.

Adding Orders

By default, CRM opens the Customer Order Entry window, however you can change what window you want to view when you select the **New** toolbar button in any of the Order features by accessing the Sales Options settings. Choose from Customer Order Entry, Order Inquiry, and Order Management windows. See “Maintaining Sales Options,” on page 3–44.

These procedures are based on the CRM default VISUAL window, Customer Order Entry.

1 To add orders, click the **New** toolbar button, or right-click your mouse in the Orders grid and select **New Record** from the menu.

The Customer Order Entry window is opened to create your order. Refer to the *Infor VISUAL User's Guide* for information on maintaining orders.

2 When you are finished with the Customer Order Entry window, click the **Save** toolbar button to save your additions.

3 To return to CRM, exit VISUAL by clicking the **Close** button located in the top right corner of the window, or select **File, Exit** from the main menu.

4 To view the order(s) you created, click the **Refresh** toolbar button in CRM.

Editing Orders

1 Double-click the order, or select the order then click the **Toggle** button in the top left corner of the Orders grid.

The Customer Order Entry window opens and your order is edited. Refer to the *Infor VISUAL User's Guide* for information on maintaining orders.

2 When you are finished editing the order, click the **Save** toolbar button.

3 To return to CRM, exit the Customer Order Entry window by clicking the **Close** button located in the top right corner of the window, or select **File, Exit** from the main menu.

4 To view the order(s) you updated, click the **Refresh** toolbar button in CRM.

Accessing the Line Items Grid

The Line Items grid contains all the line items from CRM orders.

By default, the Customer Order Entry window is opened, however you can change what window you want to view when you select the **New** toolbar button in any of the Order features by accessing the Sales Options settings. Choose from Customer Order Entry, Order Inquiry, and Order Management windows. See “Maintaining Sales Options,” on page 3–44.

1 Expand the Sales feature by clicking on the **+** button beside Sales.

2 Click the **+** button beside Orders, then click the **Line Items** button.

The Order Lines grid contains basic information about each line item in an order.

3 To edit or maintain line items on an order, click the appropriate Customer Order ID under the **Cust Order ID** column.

Refer to your *Infor VISUAL User's Guide* for information on editing line items on orders in the Customer Order Entry window.

4 To view account details for a selected line item, click the appropriate account name under the **Account Name** column.

The account details are opened in the bottom pane. See “Using the Accounts Feature,” on page 5–4.

Note: You have the option of viewing the Specifications associated with the order line in VISUAL. Viewing this column could result in slower performance when populating the grid. You can customize the layout of this grid to omit the Specifications column if performance becomes an issue. See “Customizing Columns,” on page 3–31.

Viewing Line Items for an Order

1 In the Order Lines grid, select the appropriate order.

2 On the option bar, click the **Line Items** button.

Note: To customize column layout, right-click your mouse in the “Line Items For Order <order number>” pane and select **Columns > Customize** from the menu. See “CRM Grids,” on page 3–22.

3 Under the **Acct Name** column, click an account name to view more information about that account.

4 Under the **Cust Order ID** column, click an Order ID to open the Customer Order Entry in VISUAL.

5 Under the **Part ID** column, click a Part ID to open the Part ID Window.

Printing and Exporting Orders

There are several options to print and export Order information in CRM. Refer to the following chapters for additional information:

- To print a report on all Order records in the Orders grid, see “Printing All Records in a Grid,” on page 4–22.
- To print preloaded and user-defined reports, see “Using the Reports Menu Option,” on page 4–24.
- To export the Orders grid or a specific record within the Orders grid and save it in a specified format, see “Exporting Grid Contents,” on page 3–25.

Using the Shipments Feature

Use the Shipments feature to view orders that have been shipped for CRM customers. You can view and maintain customer orders from any of the three windows you chose to access from the Order grid (Customer Order Entry, Order Inquiry, or Order Management window) in VISUAL, or view account details in the bottom pane in CRM.

Accessing the Shipments Grid

1 Expand the Sales module by clicking on the **+** button beside Sales on the navigation bar, then click the **Shipments** button.

The grid displays shipments associated with your allowable sites.

You can change the way you view information in this grid by using the filter options or customizing columns. See “CRM Grids,” on page 3–22..

2 Click the Customer Order ID under the **Cust Order ID** column to view the selected order in the Customer Order Entry, Order Inquiry, or Order Management window in VISUAL. To select the window CRM opens, see “Maintaining Sales Options,” on page 3–44.

3 Click the account name under the **Acct Name** column to view account details for the selected account in the bottom pane of CRM.

Accessing the Line Items Option

The Line Items option on the Option bar and the Line Items button under the Shipments feature lists line items for customer orders that has been shipped.

1 To view line items for a particular shipment, select the shipment in the Shipments grid, then click the **Shipments** option button on the option bar.

Note: You can also click the **+** button beside the Shipments feature on the navigation bar, then click the ***Line Items*** button. The Shipment Lines grid lists all the line items for CRM shipments. Accessing this window allows you to view all the line items in one grid without the Shipments grid in the top pane.

You can access the same information in the Shipment Lines For Shipment window as you can in the Shipments grid (such as customer order and account name). And since this window is a grid, the filter features, mail merge function, and column customizing applies.

2 Click the Customer Order ID under the **Cust Order ID** column to view the selected line item in the Customer Order Entry window in VISUAL.

3 Click the account name under the **Acct Name** column to view account details for the selected line item in the bottom pane of CRM.

Viewing Line Items for a Shipment

1 In the Shipments grid, select the appropriate shipment.

2 On the option bar, click the **Line Items** button.

Note: To customize column layout, right-click your mouse in the “Shipment Lines for Shipment <shipment number>” pane and select **Columns > Customize** from the menu. See “Customizing Columns,” on page 3–31.

3 Under the **Acct Name** column, click an account name to view more information about that account.

4 Under the **Cust Order ID** column, click an Order ID to open the Customer Order Entry in VISUAL.

Printing and Exporting Shipments

There are several options to print and export Shipment information in CRM. Refer to the following chapters for additional information:

- To print a report on all Shipment records in the Shipments grid, see “Printing All Records in a Grid,” on page 4–22.
- To print preloaded and user-defined reports, see “Using the Reports Menu Option,” on page 4–24.
- To export the Shipments grid or a specific record within the Shipments grid and save it in a specified format, see “Exporting Grid Contents,” on page 3–25.

Using the Competitors Feature

Use the Competitors feature to create and maintain competitors. Create strategies for each competitor, and access records that are associated with the competitor using the option bar.

Accessing the Competitors Grid

Expand the Sales module by clicking the **+** button beside Sales, then click the **Competitors** button.

The Competitors grid lists general information about each competitor in CRM.

The Option bar at the top of the Competitors grid allows you to create and maintain records associated with the selected competitor. The Competitors Option bar includes: **History**, **Tasks**, **Addresses**, **Contacts**, **Opportunities**, **Org Chart**, and **Documents**. For more information on the organization chart, refer to "Accessing the Org Chart Option" on page 7–46. For other options, refer to "Using the Option Bar" on page 3–39.

Use the **Opportunities** option button to view opportunities lost to selected competitors.

Adding a Competitor

From the Competitors grid, click the **New** toolbar button, or right-click within the Competitors grid and select **New Record** form the menu.

Refer to the following information in the New Competitor window.

Account ID – A system assigned number that uniquely identifies the record. You can edit this field up until the first time it is saved. **Account Type** – You cannot edit this field. The type of record you are creating.

Lead – Select this check box if this account is a lead. You can only select this check box if the account is not linked to a VISUAL customer. Clear the check box if you do not want to designate the account as a lead.

Specifications – If you have specifications for the selected competitor, the **Specifications** button is active (located in the upper right portion of the window). Since you are creating a new competitor, the **Specifications** button is inactive. To create specifications, click the **Specifications** toolbar button. See “Maintaining Specifications,” on page 4–21.

Review and specify information in these tabs to add the competitor to the Competitors to the CRM database.

Account Tab

The Account tab includes general account information such as the customer name, address, and relevant comments.

1 If necessary, click the **Account** tab.

2 Enter the following information in the Account tab.

Name – Specify the name of the competitor.

Address – Specify the address where the competitor resides.

City, St, Zip – Specify the city, state, and zip code of the competitor in the appropriate fields. Click the drop-down list in the State field to select a state from the list.

Country – Specify the country where the competitor resides.

3 If this competitor has an alternate name and address, such as an affiliate, specify the information in the fields below, or click the browse button to select from existing account names and addresses in the list. Refer to Step 4 for field definitions.

Comments – Specify any comments applicable to the selected competitor.

4 Click the **Save** toolbar button to save your additions.

Contact Tab

The Contact tab lists information about the contact associated with this competitor.

1 Click the **Contact** tab.

2 Enter the following information in the Contact tab.

Primary Contact – To specify a contact, the contact must already exist in the CRM database. Click the **Primary Contact** button to select an existing contact, if applicable, from the list.

To create a Contact, select **Actions > New Contact Wizard** from the main menu, or access the Contacts Grid. See “Using the New Contact Wizard,” on page 4–12.

Acct Phone – Specify the account’s phone or business phone of the competitor in the field provided.

If you entered a business phone number, you can click the **Bus Phone** button to automatically dial the number through your system’s modem.

Alt Phone – If there is an alternate phone number for the competitor, specify the number in the field provided.

If you entered an alternate phone number, you can click the **Alt Phone** button to automatically dial the number through your system’s modem.

Account Fax – Specify the fax number of the competitor in the field provided.

Change Web Password – Click the **Change Web Password** button to update or create password information for the account.

3 Click the **Save** toolbar button.

Profile Tab

The Profile tab includes general information about the competitor such as a Parent Account, SIC codes, and plant specifications.

1 Click the **Profile** tab.

2 If a parent account exists in the CRM database for the competitor, click the **Parent Account** button to select an account from the list.

You can view account details in the bottom pane by clicking the **View Detail** button, but you must save the selected competitor first.

3 Enter information in the following fields:

URL – Specify the competitor's URL address, if applicable.

After the URL has been entered, click the **Web** button to access the website.

Description – Specify a user-defined general description for the competitor.

Bus. Type – Specify the type of business of the competitor.

# of Employees – Specify the number of employees for the account.

Plant SQFT – Specify the square footage of the competitor's plant.

Year Established – Specify the year the competitor was established.

Products – Specify the products the competitor manufactures in the Products text box.

Annual Sales – Click the drop-down list to select the competitor's annual sales.

SIC Codes – The SIC (Standard Industrial Classification) codes classify various companies by the products they produce.

4 Click the browse to choose a **SIC** code for each field. Select up to four SIC codes for each account.

5 Click the **Save** toolbar button.

Strategy Tab

The Strategy tab allows you to create strategies for selling your products over those of your competitors. Specify the strengths and weaknesses of each competitor and plan a strategy based on the competitor's characteristics. You also have the option to specify additional information if necessary.

1 Click the **Strategy** tab.

2 Enter the competitor's strengths in the **Strengths** text box.

3 Enter the competitor's weaknesses in the **Weaknesses** text box.

4 Enter a strategy your company should follow when dealing with the selected competitor in the **Strategy** text box.

5 Enter any additional information in the **Other** text box.

6 Click the **Save** toolbar button to save your additions.

User Tab

Use the User tab to specify additional user-defined information to each competitor. Create fields for the User tab from the Navigation Bar in **Admin > User Defined Fields**.

Editing Competitors

1 With the appropriate competitor selected in the Competitors grid, click the **Toggle** button at the upper left side of the grid. You can also double-click the selected competitor.

2 Click the **Save** toolbar button after you are finished editing.

3 To return to the Competitors grid, click the **Toggle** button, or click the **Competitors** button on the navigation bar.

Deleting/Undeleting Competitors

1 With the appropriate competitor(s) selected in the Competitors grid, click the **Delete** toolbar button, or select **Edit, Delete Record(s)** from the main menu.

   Note: You can also right-click your mouse on the record you want to delete in the Competitors grid and select **Delete Record(s)** from the menu.

2 If you set up CRM to prompt you when deleting records, click **Yes** to delete the call, or **No** to cancel the deletion in the Record Deletion dialog.

3 With the deleted competitor(s) selected, you can undelete the record as long as you have not saved the deleted record. To do so click the **Delete** toolbar button again, or select **Edit, Undelete Record(s)** from the main menu.

4 To permanently save your changes, click the **Save** toolbar button, or click **Yes** when exiting the grid.

Accessing the Org Chart Option

1 Select the competitor in the Competitors grid, then click the **Org Chart** option from the option bar menu.

   The Org Chart For pane lists personnel associated with the selected competitor in a tree chart. The Org Chart For pane produces the same information as the Contacts option, but in a tree chart format.

2 Make sure the Org Chart For pane is active by clicking anywhere within the pane.

3 To enlarge or reduce the size of the organization chart, click the **50%**, **75%**, or **100%** boxes in the top right corner of the pane.

If you view the chart at 50% or 75%, the view of each contact is increased when you scroll over the contact with your mouse. This allows you to read the information on each card while maintaining an overall view of the chart.

4 You can click on any of the email addresses of contacts to open an email addressed to the specified contact.

5 To view contact details, double-click the box anywhere except the email address field of the contact you want to view. Alternatively, select the box and click the **Toggle** button.

The Contact window replaces the Org Chart For window in the bottom pane.

For more information on maintaining contacts, refer to Chapter 5, “Using the Contacts Feature”.

6 To return to the Org Chart For pane, click the **Toggle** button in the top left corner of the pane.

Chapter 8: Help Desk (Standard Interface)

This chapter includes:

Topic

About the Help Desk (Standard Interface)

You can implement the Help Desk module as a Unified Interface or a Standard Interface. Each interface offers benefits based on the ways in which you use your Help Desk component. Refer to the explanations of each interface for more information.

Caution: If you want to change the Help Desk interface, you should do so when you first install CRM. If you attempt to change the Help Desk interface after you have been working in the Help Desk component and have created one or more calls and issues, you could lose valuable Help Desk data.

Defining the Standard Help Desk Interface

The standard interface separates calls and issues into two different features within the Help Desk component. This type of interface is useful if you need to assign multiple issues to one call.

The Standard Interface is automatically assigned for the Help Desk component. If you want to work in this interface, you do not need to complete any additional steps. See the sections on “Calls” and “Issues” for information and procedures on working in the Help Desk feature.

Calls

This section discusses the Calls feature as it is displayed in the standard Help Desk interface. If you are working in a unified Help Desk interface, refer to “About the Help Desk (Unified Interface)”.

A call is the record of an issue and resolution. The **Calls** feature allows you to create and maintain customer calls, add or delete issues on calls, and flag calls for follow-up. The **Calls** button has four sub-buttons: **Open Calls, My Calls, My Open Calls,** and **Follow-up Items**. All the **Calls** buttons open the same grid, but filter data differently for easy access.

Calls – Includes all calls entered in CRM.

Open Calls – Lists all open calls.

My Calls – Lists only the calls you enter.

My Open Calls – Includes your open calls.

My Follow-up Items – Lists calls you entered that have been flagged for follow-up.

Accessing the Calls Grids

Expand the Help Desk module in the navigation bar by clicking the **+** button beside Help Desk, then click the **Calls** button.

To access **Open Calls**, **My Calls**, or **My Open Calls**, click the **+** button beside Calls, then click the appropriate **Calls** button.

Click the **Calls**, **Open Calls**, **My Calls**, or **My Open Calls** button.

The grid displays only calls created in your allowable sites. You can change the way you view information in this window by using the filter toolbar buttons, or by customizing columns. See “CRM Grids” on page 3-22.

The Option bar at the top of the Calls grid allows you to create and maintain additional information associated with the selected call. The Calls Option bar includes **History**, **Issues** and any applications you add from the App Builder module.

Adding Calls

Click the **New** toolbar button, or right-click in the Call grid and select **New Record** from the menu.

Review this information in the New Call window.

Call ID – You cannot edit this field. A system-generated number that uniquely identifies the call.

Status – Click the drop-down list to select a status for the call. Choose from **Open**, **Hold**, **Review**, **Pending**, **Verified**, **Closed**, **Canceled** or **Invoiced**. You can automatically populate the Status field using the Status default for new calls in the **Defaults** feature in the **Admin** module.

Entering Information in the General Tab

The General tab lists basic call information, such as Account, Contract, and Part IDs, the name of the caller, and the status and dates of the call.

1 Click the **General** tab if necessary.

2 Enter the following information in the General tab.

Site ID – If you use multiple sites, click the drop-down arrow and select the site that is responding to this call. You can choose from any of your allowable sites. If you use a single site, the ID of your single site is inserted.

Contact – The name and phone number of the calling contact. The Contact field is automatically populated with the primary contact for the selected Account. To edit the contact, click the **Contact** button to select a contact from the list.

You can create a new contact for a new call by selecting Actions, New Contact Wizard from the main menu. See “Using the New Contact Wizard” on page 4-12.

After you specify a contact in the Contact field, click the **Save** toolbar button, then click the **View Detail** button to view the contact detail in the bottom pane. Click the **Contact** button to select the caller or person to contact regarding this call.

After a Contact has been entered in the Contact field, you can click on the **View Detail** button to open the contact detail in the bottom pane.

Account – Click the **Account** button to choose an account associated with this call.

If there is a contract specified for the call, the default for this field is the Account ID for that contract.

If you entered an Account in the Account field, click the **Save** toolbar button, then click the **View Detail** button to view the account detail in the bottom pane.

Lookup – If the issue is in reference to a CRM record, click the **Lookup** drop-down button. You can choose one of the following types of records from the list: **Contract**, **Contract Item**, **Part** and **Trace**.

You can add this field entry to your Calls grid by using the Customize Columns feature. See “Customizing Columns” on page 3-31.

Lookup Item – When you select an item in the Lookup field, the Lookup Item field is active. This field allows you to find the specific record that relates to the call. Click the **Lookup** button to open a list of records that relate to the type of record you selected. For example, if you selected Part in the Lookup field, when you select the browse button, all the parts available are listed.

The browse list displays only items associated with the Site ID you selected.

After you have selected a Lookup Item, you can save the record and click the **View Detail** button to view the contract or contract item.

Address ID – To associate the call with a particular account address, click the Address ID button to select the appropriate address.

Note: If the resolution of the call is simple and can be handled by the employee initially taking the call, use the description field for both the issue and resolution. However, if the call is more complex and/or billable time is required, use the Issues option on the Calls option bar. Issues must be used to calculate billable time for calls.

Issue – Use this field to describe the issue.

Resolution – Use this field to describe the resolution to the issue.

History – This area logs the previous resolutions for the call with an owner, timedate stamp.

Priority – Select the appropriate priority level for the call from the drop-down list.

3 Click the **Save** toolbar button (or from the main menu, select **File, Save**) to save your additions.

Entering Information in the Detail Tab

The Detail tab allows you to categorize your call, specify open and close call dates, assign the call to a user, and specify additional information and comments.

1 Click the **Detail** tab.

2 Specify this information:

Keyword – Use the Keyword field to sort Calls by user-defined columns in the Calls grid. Click the drop-down list to assign a keyword to the Issue. Keywords are user-defined in **Tools > Maintain > Keywords**.

Category – Click the drop-down list to select a category based on the selection in the Keyword field. Categories further specify a type of issue on a call. Categories are user-defined in **Tools > Maintain > Keywords**.

Resource – Click the **Resource ID** browse button to select a Resource ID from the list. The browse displays only the resources assigned to the Site ID you selected. The browse also displays only resources not marked as obsolete.

Assign To – Click the **Assign To** browse button to assign the issue to another employee. You can select any employee assigned to work in the site selected on the General tab.

Owner – Click the **Owner** browse button and assign a user to this call. The Owner browse is filtered based on the site selected on the General tab.

Sls Rep ID – Click the Sales Rep ID browse button to assign a sales rep to the call and its associated resolutions. If the call is associated with an account, the system inserts the default sales rep defined on the Account record. You can change the sales rep from the default value to another value of your choosing.

If you use Infor VISUAL 10.0.0 or higher, the look up shows active sales reps only.

Comm % – Specify the commission percentage the sales rep earns on the call. If the call is associated with an account, the system inserts the default commission rate specified on the Account record. If the call is not associated with an account, the system inserts the default value defined on the Sales Rep record. You can change the commission rate to a value of your choosing.

Currency – Specify the currency to use when billing for the call. You can select any currency used by the parent entity of the selected Site ID.

Terms – Click the **Terms** button to specify the payment terms for the call. Create terms in the Terms Maintenance dialog in VISUAL's Application Global Maintenance. If you use VISUAL Financials Global Edition for .NET, create terms in VISUAL Financials Global Edition Terms Rule Maintenance.

Comments – Specify any additional comments you want users to view when opening this call. This field is useful for relaying information to the person who has been assigned this call.

Information – The Information field contains general or summarized information about certain data associated with this call, such as a summary of any file entered in the Lookup field, as well as Sold To and Bill To information. This text box is read-only.

Promise – Click the drop-down calendar to select the promise date for the selected issue.

Open – This field is automatically populated with the current system date when the call was created, however you can click the **Open** drop-down calendar to select a different date that the call was opened or created.

Closed – When you are ready to close the call, click the **Closed** drop-down calendar to select the date the call is completed or closed.

Bill Rate – Specify the billing rate to apply to the call. If the call is associated with an account, the system inserts the default bill rate specified on the Account record. If the call is not associated with an account, the system inserts the default bill rate specified in Defaults. You can select a different rate.

For more information on setting up billing rates, refer to "Maintaining General Maintenance" on page 2–5. For more information on specifying a billing rate on an account record, refer to "Entering Information in the Accounting Tab" on page 5–8. For more information on setting up the default billing rate, refer to "Entering Information in the Help Desk Tab" on page 13–10.

Rev GL Account ID – Specify the revenue account for the invoice that will be generated to bill for the call. If the call is associated with an account, then the system inserts the default A/R account specified on the Account record. If the call is not associated with an account, then the system inserts the revenue GL account specified in Defaults.

If you use multiple sites and have set up account browse filters in the VISUAL Manufacturing Accounting Window, then the Rev GL Account ID browse is filtered by the site you selected in the General tab. You can still type in any account in your chart of accounts.

For more information on specifying an A/R GL account on an account record, refer to "Entering Information in the Accounting Tab" on page 5–8. For more information on setting up the default revenue GL account, refer to "Entering Information in the Help Desk Tab" on page 13–10.

Discount Code – Specify the discount code that applies to the call. If the call is associated with an account, the system inserts the default discount code specified on the Account record.

For more information on specifying the discount code on an account record, refer to "Entering Information in the Accounting Tab" on page 5–8.

Sales Tax ID – Specify the sale tax to apply to the call. If the call is associated with an account, the system inserts the default Sales Tax ID specified on the Account record.

For more information on specifying the sales tax on an account record, refer to "Entering Information in the Accounting Tab" on page 5–8.

3 Click **Save** when you are finished entering information in the Detail tab.

Entering Information in the Follow-Up Tab

The Follow-up tab allows you to automatically generate a task for this call and assign it to a specified user. When a follow-up task is generated, the task is displayed in the Tasks feature for that user.

1 Click the **Follow-Up** tab.

2 Enter the following information in the **Follow-Up Task** section.

   Auto Generate – If you want to automatically generate a follow-up task for this call, select the **Auto Generate** check box.

   After Close __ Days – Specify the number of days after the call is closed or completed that you want the task automatically generated.

   Assigned To – Click the **Assigned To** button to select the user who should receive this follow-up task.

3 Click the **Save** toolbar button or select **File**, **Save** from the main menu.

Entering Information in the User Tab

The User tab allows you to create additional user-defined information to your calls within CRM. Create fields for the User tab from the Navigation Bar in **Admin > User Defined Fields**.

Entering Information in the Payments Tab

If a call is billable, use the Payments tab to review the costs associated with the call before generating an invoice.

The system disables the Payment tab until an Account ID and Billing Rate have been specified for the call and at least one resolution entry has been added to the call.

To view and edit the payment information, click the **Payment** tab.

The billing grid contains the following information:

Call ID – The system inserts the ID of the call to be billed. This is a read-only field.

Issue No – The system inserts the ID of the issue that has been resolved and is to be billed. This is a read-only field.

Line No – The system inserts the call resolution's line number. This is a read-only field.

Bill Rate ID – The system inserts the Bill Rate ID associated with the call. You can edit this field.

Bill Rate – The system inserts the billing rate associated with the selected Bill Rate ID. This is a read-only field.

Bill – Select this check box to manually trigger the system to create an invoice for a call. If the call is covered by a contract with the account and you select this check box, then the system will invoice the call separately from the terms of the contract. If the account has a contract for calls, be careful when you select this check box. You may inadvertently over-bill the account.

Bill Date – If you want to trigger invoice generation based on date, specify the date you would like to use as the trigger. On the selected date, the system will prepare an invoice. This field defaults to the current date. You can edit this field.

Hrs Worked – The system calculates the amount of time spent on the call and inserts the value in this field. To calculate this value, the system subtracts the start time of the call from the end time of the call.

Disc % – The system inserts the discount percentage specified on the call record. You can change this value.

Comm % – The system inserts the commission percentage specified on the call record. You can change this value.

Act Amount – The system multiplies the value in the Hrs Worked field by the value in the Bill Rate field and inserts the product in the Act Amount field. This field is read-only.

Tax Grp ID – The system inserts the Tax Group ID specified on the call record. You can edit this field. If VAT is enabled, this field is not visible.

VAT Code – The system inserts the VAT code associated with the contract. You can edit this field. If VAT is not enabled, this field is not visible.

Invoiced – The system selects this check box when it has generated an invoice. This field is read-only.

Invoiced Date – The system inserts the date of the invoice. This field is read-only.

Invoice ID – The system inserts the Invoice ID associated with the call. This field is read-only.

Receivable ID – The system inserts the Receivable ID associated with the invoice. This field is read-only.

Adding Issues

An issue is the part of a call that describes the subject of the call, and its resolution(s). You can add multiple resolutions to each issue, and multiple issues to each call. Billable time for each call is recorded in the Resolutions tab of an issue.

Note: You cannot add issues to a call that has been closed or canceled. You must open another call to add an issue.

1. With the appropriate call selected in the Calls grid, click the **Issues** button on the option bar.

   The Call Issues For Call pane lists all issues associated with the selected call along with general issue information.

   Note: To customize column layout, right-click your mouse in the “Call Issues for Call <call number>” pane and select **Columns > Customize** from the menu. See “CRM Grids” on page 3-22.

2. Click anywhere within the Call Issues For Call pane to activate the pane, then click the **New** toolbar button, or right-click in the Call Issues for Call pane and select **New Record** from the menu.

The New Call Issue pane has two tabs: **Issue** and **Resolution**.

3 Review this information in the New Call Issue pane.

Call __ Issue – You cannot edit this field. The issues are consecutively numbered per call when an issue is saved.

Status – Click the drop-down list to assign a status to the issue. Choose from **Open**, **Hold**, **Closed**, **Canceled** or **Invoiced**.

Note: When you are ready to close a call, all issues associated with the selected call must be closed as well. You will not be able to close a call if the associated issues are not in the closed or canceled status.

Specifications – The **Specifications** button, located in the top right corner of the pane, saves specifications for the selected issue. If there are specifications for the issue, the **Specifications** button is active. If there aren't any specifications, the button is inactive. See "Maintaining Specifications" on page 4-21.

Review these tabs to add information in the new issue.

Entering Information in the Issue Tab

The Issue tab includes general information about the issue such as status, the issue, priority, Resource ID, who has been assigned the issue, and user-defined fields.

1 If necessary, click the **Issue** tab.

2 Enter the following information in the Issue tab.

Site - If using multiple sites, click the drop-down arrow and select the site that is responding to this call. You can choose from any of your allowable sites. If you use a single site, the ID of your single site is inserted.

Priority – Click the drop-down list to select a priority from the list. Priorities are user-defined in **Tools > Maintain > General Codes**. This field is required.

Resource – Click the **Resource** browse button to select a Resource ID from the list. The system displays only those resources not marked obsolete in Shop Resource Maintenance in VISUAL. Resource IDs are defined in VISUAL. This field is required.

Assign To – Assign an issue to an employee. Click the browse button to select an Employee ID from the list. This field is required before a call can be closed.

Owner - Click the browse button to select an Owner ID from the drop-down list.

Issue – Specify the issue or reason for the call in the text box provided.

Promise – Click the drop-down **Calendar** to select a promise date for the selected issue.

Keyword – Click the drop-down list to select a keyword from the list. Keywords are user-defined in the main menu under **Tools > Maintain > Keywords**.

Category – Click the drop-down list to select a category from the list. Categories are a subcategory of Keywords. Define categories in the main menu under **Tools > Maintain > Keywords**.

3 Click the **Save** toolbar button.

Entering Information in the Resolution Tab

The Resolution tab allows you to specify suggested resolutions to the issue using a time clock which features optional reference billing. This tab also lists a history of each resolution for the selected issue.

1 Click the **Resolution** tab.

2 Enter the suggested resolution in the text box provided, or click the Start button, then begin typing in the text box. You can specify as many resolutions as necessary.

   Note: When you begin typing the resolution in the Resolution text box, the time clock is automatically started.

   To cancel the entry, click **Cancel** to the left of the text box.

3 When the resolution is complete, click **Stop** to the left of the text box.

   The Stop Recording Time window allows you to make changes to clock and billing information as well as automatically closing the issue when exiting the window, if applicable.

4 Refer to the following information in the Stop Recording Time window.

   Start Date/Time/ End Date/Time – Click the drop-down list to choose from a calendar of start dates or end dates. This field is populated with the date and time starting from the time you clicked the **Start** button (or began typing) until you clicked the **Stop** button. Edit the start/end time by clicking in the field and entering the necessary information.

   Elapsed Hrs – The elapsed time is automatically calculated beneath the End Date/Time field.

   Time is Billable – Select this check box if you want the time recorded to be billed to the account. This applies the default billing rate for the employee that provided the resolution. All billable time associated with a call and its issues are accumulated when the Call is closed.

   If you selected a contract in the Lookup field for the call, select this check box if the call is not covered by the contract and you want to bill the account separately for the call. Clear the check box if the call is covered by the contract.

   Billable Hrs – Active when **Time is Billable** check box is selected. Specify the number of billable hours in the field provided. The billable time from the start to end times is automatically calculated.

   Close Issue – Select this check box is you want to change the status of the issue from open to close. This check box is only available if all necessary information has been entered in the issue.

5 Click **OK** to accept the information in the Stop Recording Time window, or **Cancel** to return to the Resolution tab without stopping the clock.

Deleting/Undeleting Issues

1 With the appropriate issue selected in the Call Issues For Call pane, click the **Delete** toolbar button, or select **Edit, Delete Record(s)** from the main menu.

   If you setup CRM to prompt you when deleting records, click **Yes** to delete the issue, or **No** to cancel the deletion in the Record Deletion dialog.

2 With the deleted record selected, you can undelete the record by clicking the **Delete** toolbar button again (as long as you have not saved the record), or select **Edit, Undelete Record(s)** from the main menu.

3 To permanently save your changes, click the **Save** toolbar button, or click the **Yes** button when exiting the pane.

Editing Calls

After you have saved a call, you cannot edit the Site ID. You can edit the other information.

1 With the appropriate call selected in the Calls grid, click the **Toggle** button. You can also double-click the selected call.

2 Click the **Save** toolbar button after you are finished editing.

3 To return to the previous grid or window, click the **Toggle** button, or click the appropriate menu button on the navigation bar.

Deleting/Undeleting Calls

1 With the appropriate call selected, click the **Delete** toolbar button, or select **Edit**, **Delete Record(s)** from the main menu.

   Note: You can also right-click on the call you want to delete and select **Delete Record(s)** from the menu.

   If you set up CRM to prompt you when deleting records, click **Yes** to delete the call, or **No** to cancel the deletion in the Record Deletion dialog.

2 With the deleted record selected, you can undelete the record by clicking the **Delete** toolbar button again (as long as the record has not been saved), or select **Edit**, **Undelete Record(s)** from the main menu.

3 To permanently save your changes, click the **Save** toolbar button, or click the **Yes** button when exiting the grid.

Flagging Calls

You are reminded to follow-up on a call at a specified date when you flag a call by a red flag being placed beside flagged calls in all the Calls grids.

1 With the appropriate call selected, click the **Flag** toolbar button, or right-click the call in the Calls grid and select **Flag for Follow-up** from the menu.

2 Click the drop-down list beside the Flag To field to choose the type of follow-up for this call. Select from **Follow-up**, **Call**, **Arrange Meeting**, **E-mail**, or **Send Letter**.

3 Click the drop-down list beside the Due By field to choose a date by which the follow-up must occur, or specify the date in Windows format.

If you do not want to specify a date, click the drop-down list, then select **None**.

4 Check the **Completed** check box when the follow-up has been completed. Flags in the Calls grid appear red when open, and gray when closed.

5 To take a follow-up flag off a call, click the **Clear Flag** button.

6 After all information is entered, click **OK** to save changes, or **Cancel** to return to the previous grid without saving changes.

Accessing My Follow-up Items

My Follow-up Items include all calls in the My Calls grid that have been flagged for follow-up.

Expand the Help Desk module in the navigation bar by clicking on the **+** button beside Help Desk. Click the **+** button beside the Calls feature, then click the **My Follow-up Items** button.

Printing and Exporting Call Information

There are several options to print and export Call information in CRM. Refer to the following chapters for additional information:

- To print a report on all Call records in the Calls grid, refer to “Printing All Records in a Grid,” on page 4–22.
- To print a report on a specific Call record, refer to “Printing a Specific Record,” on page 4–22.
- To print preloaded and user-defined reports, refer to “Using the Reports Menu Option,” on page 4–24.
- To export the Calls grid or a specific record within the Calls grid and save it in a specified format, refer to “Exporting Grid Contents,” on page 3–25.

Issues

This chapter discusses the Issues feature as it is displayed in the standard Help Desk interface. If you are working in a unified Help Desk interface, refer to "refer to "Calls & Issues in a Unified Interface," on page 9–3."

An issue is the record of the subject of a call and its resolution. Use the **Issues** button to view, and edit subject, resolution and billing information for each call. You can also delete issues from this grid.

The **Issues** button has one sub-button: **My Issues**. Both the **Open Issues** and **My Open Issues** buttons open the same grid, but filter data differently. The Issues grid includes all issues entered in CRM. The Open Issues grid lists only open issues.

Accessing the Issues and Open Issues Grids

Expand the Help Desk module in the navigation bar by clicking the **+** button beside Help Desk.

Click the **Issues** button, or click the **+** button beside the Issues feature, then click the **My Issue, Open Issues**, or **My Open Issues** button.

The Call Issues grids lists basic information about each Issue. You can change the way you view information in this window by using the filter options or customizing columns. See "CRM Grids" on page 3-22.

Editing Issues

With the appropriate Issue selected, click the **Toggle** button at the upper left side of the grid.

Refer to the following information when editing or viewing the Call Issue Window.

Call __Issue – You cannot edit this field. A system-assigned number that identifies the issue of the call.

Status – Click the drop-down list to select the status of the issue. Choose from **Open, Hold, Closed**, **Canceled**, **Invoiced**.

Specifications – The **Specifications** button allows you to enter specifications for the selected issue.

If the specifications icon in the Call Issue window is active, specifications exist for the selected issue. If the **Specification** icon is inactive, no specifications exist for the selected issue.

To add specifications, click the **Specifications** toolbar button. See "Maintaining Specifications" on page 4-21.

Review these tabs to edit information in the Call Issue window.

Entering Information in the Issue Tab

The Issue tab includes basic information about the selected issue such as description, priority, who the issue is assigned to, and status.

1. If necessary, click the **Issue** tab to view issue information.
2. Refer to the following information in the Issue tab.

   Site ID - If you use multiple sites, click the drop-down arrow and select the site that is responding to this issue. You can choose from any of your allowable sites. If you use a single site, the ID of your single site is inserted.

   Priority – Click the drop-down list to select a priority from the list. Choose from **Critical**, **High**, **Medium**, or **Low**. This field is required. This field is user-defined in **Tools > Maintain > General Codes**.

   Resource – Click the Resource button to select a Resource ID from the list. The system displays only those resources not marked obsolete in Shop Resource Maintenance in VISUAL. Resource IDs are user-defined in VISUAL.

   Assign To – Click the Assign To button to assign the issue to another person.

   Owner – Click the Owner browse button and assign a user to this issue.

   Issue – Specify a general description for the call. This field is required.

   Promise – Click the drop-down calendar to select the promise date for the selected issue.

   Keyword – Use the Keyword field to sort Calls by user-defined columns in the Calls grid. Click the drop-down list to assign a keyword to the Issue. Keywords are user-defined in **Tools > Maintain > Keywords**.

   Category – Click the drop-down list to select a category based on the selection in the Keyword field. Categories further specify a type of issue on a call. Categories are user-defined in **Tools > Maintain > Keywords**.
3. Click the **Save** toolbar button to save your additions.

Entering Information in the Resolution Tab

The Resolution tab allows you to specify multiple resolutions and manually start and stop the billing clock. You can also view a history of previous solutions in the History field.

1. Click the **Resolution** tab.
2. Specify a resolution in the text box provided. When you begin typing, the billing clock automatically starts, if you have chosen to allow billable calls. You can also click **Start** to begin billing time as well.
3. To cancel your entry and billable time, click **Cancel**.
4. When you complete the resolution, click **Stop** to the left of the text box.

   The Stop Recording Time window allows you to make changes to clock and billing information as well as automatically closing the issue when exiting the window.

5 Refer to the following information in the Stop Recording Time window:

Start Date/Time/ End Date/Time – Click the drop-down list to choose from a calendar of start dates or end dates. This field is populated with the date and time starting from the time you clicked **Start,** or began typing, until you clicked **Stop**. Edit the start/end time by clicking in the field and entering the necessary information.

Elapsed Hrs – The elapsed hours are automatically calculated beneath the End Date/Time field.

Time is Billable – Select this check box if you want the time recorded to be billed to the account. This applies the default billing rate for the employee that provided the resolution. All billable time associated with a call and its issues are accumulated when the Call is closed.

Billable Hrs – Active when **Time is Billable** check box is selected. Specify the number of billable hours in the field provided. The billable time from the start to end times is automatically calculated.

Close Issue – Select this check box is you want to change the status of the issue from open to close.

6 Click **OK** to accept the information in the Stop Recording Time window, or **Cancel** to return to the Resolution tab without stopping the clock.

7 View previous resolutions associated with this issue in the History text box. Each entry includes the User ID, the start and end date and time, the number of billable hours, and the resolution. You must save the record to view your most recent resolutions.

8 Click the **Save** toolbar button.

9 To return to the previous grid, click the **Toggle** button, or click on the appropriate menu button on the navigation bar.

Entering Information in the User Tab

The User tab allows you to create additional user-defined information for your history items. Create fields for the User tab in the Navigation bar in **Admin > User Defined Fields**.

1 Click the **User** tab.

2 Enter the necessary information in the fields provided.

3 Click the **Save** toolbar button (or from the main menu, select **File, Save**) to save your additions.

Deleting/Undeleting Issues

1 With the appropriate issue selected, click the **Delete** toolbar button, or select **Edit, Delete Record(s)** from the main menu.

If you setup CRM to prompt you when deleting records, click **Yes** to delete the call, or **No** to cancel the deletion in the Record Deletion dialog.

2 Click **Yes** to delete the Issue, or **No** to cancel the deletion.

3 With the deleted record selected, you can undelete the record by clicking the **Delete** toolbar button again (as long as the record has not been saved), or select **Edit**, **Undelete Record(s)** from the main menu.

4 To permanently save your changes, click the **Save** toolbar button, or click the **Yes** button when exiting the window.

Accessing the Calls Pane

From the Call Issues grid, you can access call details by clicking on the appropriate cell under the **Call ID** column. The details for the selected call appear in the bottom pane.

For more information on the Call window, refer to “Calls”.

To exit the Call pane, click the **Close** button.

Printing and Exporting Issues

Several options to print and issue Issue information are provided in CRM. Refer to the following chapters for additional information:

- To print a report on all Issue records in the Call Issues grid, refer to “Printing All Records in a Grid,” on page 4–22.
- To print a report on a specific Issue record, refer to “Printing a Specific Record,” on page 4–22.
- To print preloaded and user-defined reports, refer to “Using the Reports Menu Option,” on page 4–24.
- To export the Call Issues grid or a specific record within the Call Issues grid and save it in a specified format, refer to “Exporting Grid Contents,” on page 3–25.

Chapter 9: Help Desk (Unified Interface)

This chapter includes:

Topic

About the Help Desk (Unified Interface)

You can implement the Help Desk component as a Unified Interface or a Standard Interface. Each interface offers benefits based on the ways in which you use your Help Desk component. Refer to the explanations of each interface for more information.

Caution: If you want to change the Help Desk interface, you should do so when you first install CRM. If you attempt to change the Help Desk interface after you have been working in the Help Desk component and have created one or more calls and issues, you could lose valuable Help Desk data.

Defining the Unified Interface

The unified interface allows you to combine calls and issues into one record, accessible from one window. This type of interface is useful if you would rather have one issue to one call.

A Standard Interface for the Help Desk component is automatically selected. To choose a Unified interface, see "Entering Information in the Help Desk Tab" on page 13–10.

With the unified interface, the detail window of a call includes the issue and the history.

For more information on working in the unified interface, see “Calls & Issues in a Unified Interface”.

Changing Your Help Desk to a Unified Interface

The Standard Interface is automatically used for the Help Desk component, however, you can change to a unified interface by following the procedures below. Remember, this change should only take place if you do not have any call or issue files in your Help Desk component, otherwise you could lose data.

1. From CRM, expand the **Admin** component in the navigation bar (by clicking the **+** button beside Admin) and select the **Defaults** feature.
2. Click the **Help Desk** tab.
3. Select the **Unified Interface** check box.
4. Click **OK** to exit the Defaults window, or **Apply** to accept the changes but remain in the window.

   Click **Cancel** to exit the Defaults window without saving your changes.

   If you OK or Apply, the Help Desk interface changes to a unified interface. See “Calls & Issues in a Unified Interface” on page 9-3.

Calls & Issues in a Unified Interface

There are two ways to view and navigate within the Help Desk module, using a unified interface or a standard interface. The unified interface allows you to combine your calls and issues in the same record, allowing one issue per call record. The standard interface separates the Calls and Issues features so that multiple issues can be attached to a single call record. There are benefits for each depending on your business needs. The features are the same as in the standard interface with all the same information, just in different locations. Refer to the following procedures to begin working with the Help Desk component in a unified interface.

Caution: If you want to change the Help Desk interface, you should do this when you first install CRM. If you attempt to change the Help Desk interface after you have been working in the Help Desk component and have created one or more calls and issues, you could lose valuable Help Desk data.

Accessing Calls

The unified interface of the Help Desk component combines both the Calls and Issues features into one record. This interface is beneficial if you only want one issue assigned per call.

A call is the record of an issue and resolution. The **Calls** feature allows you to create and maintain the following information within each call record: contact information, comments, ways to categorize each call, follow-up details, the issue, billing information of the issue, the resolution of the issue, any user-defined information, and flag calls for follow-up.

The **Calls** button has four sub-buttons: **Open Calls**, **My Calls**, **My Open Calls**, and **Follow-up Items**. All the **Calls** buttons open the same grid, but filter data differently for easy access.

Calls – Includes all calls entered in CRM.

Open Calls – Lists all open calls.

My Calls – Lists only the calls you create.

My Open Calls – Includes all the calls you create that have an open status.

My Follow-up Items – Lists calls you created that have been flagged for follow-up.

1. Expand the Help Desk component if necessary, by clicking the **+** button beside the Help Desk.

   The Help Desk component is expanded to reveal the Help Desk features.

2. To view the sub-features within the Calls feature, click the **+** button beside Calls.

3. Click any one of the **Calls** buttons (**Calls**, **Open Calls**, **My Calls**, **My Open Calls**, **My Follow-up Items**) to access the Calls grid.

   The Calls grid is filtered by your allowable sites, and lists basic information about each call and issue. You can change the way you view information in this window by using the filter options or customizing columns. See "CRM Grids" on page 3-22.

The Option bar at the top of the Calls grid allows you to create and maintain additional information associated with the selected call. The Calls Option bar includes **History**, **Service Orders**, and any applications you add from the App Builder module. You can create a history from the Call window, as well as generate a service order from the Call window. For information on the Notes option, refer to “Using the Option Bar”.

Adding Calls

Click the **New** toolbar button, or right-click in the Call grid and select **New Record** from the menu.

The New Call window includes four tabs: **General**, **Detail**, **Follow-up**, and **User**.

Refer to the following information in the New Call window.

Call ID – You cannot edit this field. A system-generated number that uniquely identifies the call.

Status – Click the drop-down list to select a status for the call. Choose from any of the CRM defaults: **Open**, **Hold**, **Closed**, **Canceled** or **Invoiced**, or you can select your own status.

You can automatically populate the Status field using the Status default for new calls in the **Defaults** feature in the **Admin** module.

Click the down arrow below the status field to select a date the call was Open, on Hold, Closed, Canceled, or Invoiced.

Refer to the following sections to add information to the new call tabs.

Adding Information in the General Tab

1 Click the **General** tab, if necessary.

The General tab contains contact information as well as the issue and resolution of the call. You can also assign a record associated with the issue as well as set the priority of the call.

2 Refer to the following fields for procedures and definitions.

Site ID – If you use multiple sites, click the drop-down arrow and select the site that is responding to this call. You can choose from your allowable sites. If you use a single site, the ID of your single site is inserted.

Contact – The name and phone number of the calling contact. The Contact field is automatically populated with the primary contact for the selected Account. To edit the contact, click the **Contact** button to select a contact from the list. This field is required.

You can create a new contact for a new call by selecting Actions, New Contact Wizard from the main menu. See “Using the New Contact Wizard” on page 4-12.

After you specify a contact in the Contact field, click the **Save** toolbar button, then click the **View Detail** button to view the contact detail in the bottom pane. Click the browse button to select the caller or person to contact regarding this call.

After a Contact has been entered in the Contact field, you can click on the **View Detail** button to open the contact detail in the bottom pane.

Account – Click the **Account** button to choose an account associated with this call.

If there is a contract specified for the call, the default for this field is the account ID for that contract.

If you entered an Account in the Account field, click the **Save** toolbar button, then click the **View Detail** button to view the account detail in the bottom pane.

Lookup – To assign a record associated with the issue to the call, click the **Lookup** drop-down list. You can choose one of the following types of records from the list: **Contract**, **Contract Item**, **Part** and **Trace**.

You can add this field entry to your Calls grid by using the Customize Columns feature. See “Customizing Columns” on page 3-31.

Lookup Item – When you select an item in the Lookup field, the Lookup Item field is active. This field allows you to find the specific record that relates to the call. Click the browse button to open a list of records that relate to the type of record you selected. For example, if you selected Part in the Lookup field, when you select the browse button, all the parts available are listed.

The items available when you click the browse button are filtered based on the Site ID you selected.

Once you have selected a Lookup Item, you can save the record and click the **View Detail** button to view the contract or contract item. If the item you selected is a part, refer to “Viewing Information in the Part Details Window,” on page 14–3.

Address ID – If you would like to associate this call with a particular account address, click the Address ID button to select the appropriate address ID.

3 Explain the issue or nature of the call in the Issue text box.

4 Enter the resolution or the ways in which the issue should be performed in the Resolution text box. You can specify multiple resolutions in the Resolution text box.

Your calls can be billed for time. For more information on setting up bills for calls, refer to “Using the Defaults Feature,” on page 13–3. Time is billable for each call when information is entered in the Resolution text box and the call is saved. Refer to step 7 for more information on billable time.

5 Click the **Priority** drop-down list to select a priority from the list. Choose from **Critical**, **High**, **Medium**, or **Low**. This field is required. This field is user-defined in **Tools > Maintain > General Codes**. See “Maintaining General Maintenance” on page 2-5.

6 Click the **Save** toolbar button or select **File**, **Save** from the main menu.

7 If you chose to bill time for calls, specify this information in the Stop Recording Time dialog:

Start Date/Time/ End Date/Time – Click the drop-down list to choose from a calendar of start dates or end dates. CRM populates this field with the date and time starting from the time you began typing till the time you saved the call record. Edit the start/end time by clicking in the field and entering the necessary information.

Elapsed Hrs – CRM automatically calculates the elapsed hours beneath the End Date/Time field.
Time is Billable – Select this check box if you want the time recorded to be billed to the account. This applies the billing rate on the call record. All billable time associated with a call and its issues are accumulated when the Call is closed.

If calls are covered by a contract and you select this check box, the system bills for the call in addition to the contract. Be sure that it is appropriate to bill for the call separately; otherwise, you could over-bill the account.

Billable Hrs – Active when **Time is Billable** check box is selected. Specify the number of billable hours in the field provided. CRM automatically calculates the billable time from the start to end times.

View previous resolutions associated with this call in the History text box. Each entry includes the user ID, the start and end date and time, the number of billable hours, and the resolution. You must save the record to view your most recent resolutions.

8 Click the **Save** toolbar button, or select **File**, **Save** from the main menu to save the call record.

Entering Information in the Detail Tab

The Detail tab allows you to categorize your call, specify open and close call dates, assign the call to a user, and specify additional information and comments.

1 Click the **Detail** tab.

2 Refer to the following information to complete the Detail tab:

Keyword – Use the Keyword field to sort Calls by user-defined columns in the Calls grid. Click the drop-down list to assign a keyword to the Issue. Keywords are user-defined in **Tools > Maintainn > Keywords**.

Category – Click the drop-down list to select a category based on the selection in the Keyword field. Categories further specify a type of issue on a call. Categories are user-defined in **Tools > Maintain > Keywords**.

Resource – Click the **Resource ID** button to select a Resource ID from the list. The browse displays only the resources assigned to the site ID you selected. The browse also displays only resources not marked as obsolete.

Assign To – Click the **Assign To** button to assign the issue to another employee. The Assign To browse is filtered by the site selected on the General tab.

Owner - Specify the ID of the call's owner. The Owner browse is filtered by the site selected on the General tab. This field is populated with the record’s creator by default. The call is displayed in the call's “My Calls” grid.

Sales Rep ID – Click the Sales Rep ID button to assign a sales rep to the call and its associated resolutions. If the call is associated with an account, the system inserts the default sales rep defined on the Account record. You can change the sales rep from the default value to another value of your choosing. If you use Infor VISUAL 10.0.0 or higher, the look up shows active sales reps only.

Comm % – Specify the commission percentage the sales rep earns on the call. If the call is associated with an account, the system inserts the default commission rate specified on the Account record. If the call is not associated with an account, the system inserts the default value defined on the Sales Rep record. You can change the commission rate to a value of your choosing.

Currency – Specify the currency to use when billing for the call. You can select any currency used by the parent entity of the selected site ID.

Terms – Click the terms button to specify the payment terms for the call. If the call is associated with an Account, the system inserts the default terms assigned on the Account record. You can change the terms as necessary.

Comments – Specify any additional comments you want users to view when opening this call. This field is useful for relaying information to the person who has been assigned this call.

Information – The Information field contains general or summarized information about certain data associated with this call, such as a summary of any file entered in the Lookup field, as well as Sold To and Bill To information. This text box is read-only.

Promise – Click the drop-down calendar to select the promise date for the selected issue.

Open – This field is automatically populated with the current system date when the call was created, however you can click the **Open** drop-down calendar to select a different date that the call was opened or created.

Closed – When you are ready to close the call, click the **Closed** drop-down calendar to select the date the call is completed or closed.

Bill Rate – Specify the billing rate to apply to the call. If the call is associated with an account, the system inserts the default bill rate specified on the Account record. If the call is not associated with an account, the system inserts the default bill rate specified in Defaults. You can select a different rate.

For more information on setting up billing rates, refer to “Maintaining General Maintenance” on page 2–5. For more information on specifying a billing rate on an account record, refer to “Entering Information in the Accounting Tab” on page 5–8. For more information on setting up the default billing rate, refer to “Entering Information in the Help Desk Tab” on page 13–10.

Rev GL Account ID – Specify the revenue account for the invoice that will be generated to bill for the call. The Rev GL Account ID browse is filtered by site if you set up account browses by site in VISUAL. If the call is associated with an account, then the system inserts the default A/R account specified on the Account record. If the call is not associated with an account, then the system inserts the revenue GL account specified in Defaults.

If you use multiple sites and have set up account browse filters in the VISUAL Manufacturing Accounting Window, then the Rev GL Account ID browse is filtered by the site you selected in the General tab. You can still type in any account in your chart of accounts.

For more information on specifying an A/R GL account on an account record, refer to “Entering Information in the Accounting Tab” on page 5–8. For more information on setting up the default revenue GL account, refer to “Entering Information in the Help Desk Tab” on page 13–10.

Discount Code – Specify the discount code that applies to the call. If the call is associated with an account, the system inserts the default discount code specified on the Account record.

For more information on specifying the discount code on an account record, refer to "Entering Information in the Accounting Tab" on page 5–8.

Sales Tax ID – Specify the sale tax to apply to the call. If the call is associated with an account, the system inserts the default sales tax ID specified on the Account record.

For more information on specifying the sales tax on an account record, refer to "Entering Information in the Accounting Tab" on page 5–8.

3 Click **Save** when you are finished entering information in the Detail tab.

Entering Information in the Follow-Up Tab

The Follow-up tab allows you to automatically generate a task for this call and assign it to a specified user. When a follow-up task is generated, the task is displayed in the Tasks feature for that user.

1 Click the **Follow-Up** tab.

2 Enter the following information in the **Follow-Up Task** section.

Auto Generate – If you want to automatically generate a follow-up task for this call, select the **Auto Generate** check box.

After Close __ Days – Specify the number of days after the call is closed or completed that you want the task automatically generated.

Assigned To – Click the **Assigned To** button to select the user who should receive this follow-up task.

3 Click the **Save** toolbar button or select **File**, **Save** from the main menu.

Entering Information in the User Tab

The User tab allows you to create additional user-defined information to your calls within CRM. Create fields for the User tab from the Navigation Bar in **Admin > User Defined Fields**.

Entering Information on the Payments Tab

If a call is billable, use the Payments tab to review the costs associated with the call before generating an invoice.

The system disables the Payment tab until an Account ID and Billing Rate have been specified for the call and at least one resolution entry has been added.

To view and edit the payment information, click the **Payment** tab.

The billing grid contains the following information:

Call ID – The system inserts the ID of the call to be billed. This is a read-only field.

Issue No – The system inserts the ID of the issue that has been resolved and is to be billed. This is a read-only field.

Line No – The system inserts the call resolution's line number. This is a read-only field.

Bill Rate ID – The system inserts the bill rate ID associated with the call. You can edit this field.

Bill Rate – The system inserts the billing rate associated with the selected bill rate ID. This is a read-only field.

Bill – Select this check box to manually trigger the system to create an invoice for a call. If the call is covered by a contract with the account and you select this check box, then the system will invoice the call separately from the terms of the contract. If the account has a contract for calls, be careful when you select this check box. You may inadvertently over-bill the account.

Bill Date – If you want to trigger invoice generation based on date, specify the date you would like to use as the trigger. On the selected date, the system will prepare an invoice. This field defaults to the current date. You can edit this field.

Hrs Worked – The system calculates the amount of time spent on the call and inserts the value in this field. To calculate this value, the system subtracts the start time of the call from the end time of the call.

Disc % – The system inserts the discount percentage specified on the call record. You can change this value.

Comm % – The system inserts the commission percentage specified on the call record. You can change this value.

Act Amount – The system multiplies the value in the Hrs Worked field by the value in the Bill Rate field and inserts the product in the Act Amount field. This field is read-only.

Tax Grp ID – The system inserts the tax group ID specified on the call record. You can edit this field. If VAT is enabled, this field is not visible.

VAT Code – The system inserts the VAT code associated with the contract. You can edit this field. If VAT is not enabled, this field is not visible.

Invoiced – The system selects this check box when it has generated an invoice. This field is read-only.

Invoiced Date – The system inserts the date of the invoice. This field is read-only.

Invoice ID – The system inserts the invoice ID associated with the call. This field is read-only.

Receivable ID – The system inserts the receivable ID associated with the invoice. This field is read-only.

Editing Calls

After you have saved a call, you cannot edit the Site ID. You can edit the other information.

1 With the appropriate call selected in the Calls grid, click the **Toggle** button. You can also double-click the selected call.

2 Refer to the field definitions and instructions in "Adding Calls" to edit the selected call record.

3 Click the **Save** toolbar button after you are finished editing.

4 To return to the previous grid or window, click the **Toggle** button, or click the appropriate menu button on the navigation bar.

Deleting/Undeleting Calls

1 With the appropriate call selected, click the **Delete** toolbar button, or select **Edit**, **Delete Record(s)** from the main menu.

   Note: You can also right-click on the call you want to delete and select **Delete Record(s)** from the menu.

2 If you set up CRM to prompt you when deleting records, click **Yes** to delete the call, or **No** to cancel the deletion in the Record Deletion dialog.

3 With the deleted record selected, you can undelete the record by clicking the **Delete** toolbar button again (as long as the record has not been saved), or select **Edit**, **Undelete Record(s)** from the main menu.

4 To permanently save your changes, click the **Save** toolbar button, or click the **Yes** button when exiting the grid.

Flagging Calls

You are reminded to follow-up on a call at a specified date when you flag a call by a red flag being placed beside flagged calls in all the Calls grids.

1 With the appropriate call selected, click the **Flag** toolbar button, or right-click the call in the Calls grid and select **Flag for Follow-up** from the menu.

2 Click the drop-down list beside the Flag To field to choose the type of follow-up for this call. Select from **Follow-up**, **Call**, **Arrange Meeting**, **E-mail**, or **Send Letter**.

3 Click the drop-down list beside the Due By field to choose a date by which the follow-up must occur, or specify the date in Windows format.

   If you do not want to specify a date, click the drop-down list, and then click **None**.

4 Check the **Completed** check box when the follow-up has been completed. Flags in the Calls grid appear red when open, and gray when closed.

5 To take a follow-up flag off a call, click the **Clear Flag** button.

6 After all information is entered, click **OK** to save changes, or **Cancel** to return to the previous grid without saving changes.

Accessing My Follow-up Items

My Follow-up Items include all calls in the My Calls grid that have been flagged for follow-up.

Expand the Help Desk module in the navigation bar by clicking on the **+** button beside Help Desk. Click the **+** button beside the Calls feature, then click the **My Follow-up Items** button.

Printing and Exporting Call Information

Several options to print and export Call information are provided in CRM. Refer to the following chapters for additional information:

- To print a report on all Call records in the Calls grid, refer to “Printing All Records in a Grid,” on page 4–22.
- To print a report on a specific Call record, refer to “Printing a Specific Record,” on page 4–22.
- To print preloaded and user-defined reports, refer to “Using the Reports Menu Option,” on page 4–24.
- To export the Calls grid or a specific record within the Calls grid and save it in a specified format, refer to “Exporting Grid Contents,” on page 3–25.

Chapter 10: Field Service

This chapter includes:

Topic

About Field Service

The Field Service module on the navigation bar includes five features that allow you to create and maintain contract types, contracts and service orders for accounts, and access the Scheduling and Purchase Orders windows from VISUAL.

Using the Contract Types Feature

Use the Contract Types feature to create contract templates that include the Site ID, sales rep, material and expense markups, what the contract covers, cost accounts, revenue accounts, and Sales Tax ID. Contract types help minimize error and decrease entry time by assigning the values mentioned above to a new contract when a contract type is selected.

Accessing the Contract Types Grid

Expand the Field Service module in the navigation bar by clicking the **+** button beside Field Service, then click the **Contract Types** button.

By default, the Contract Types grid lists a brief description of the contract type, the product code associated with the contract type, whether labor, materials, or expenses are covered, the Sales Rep ID, and the labor rate used for this contract.

You can organize records in this grid by using the filter options or add additional data to the grid by customizing columns. See “CRM Grids” on page 3-22.

Adding a Contract Type

When you add a contract type to the Contract Types grid, the contract type can be applied to any new contract from the Contract Type field in the Contracts grid.

From the Contract Types grid, click the **New** toolbar button, or right-click your mouse and select **New Record** from the menu.

The New Contract Type window displays a Type ID field that you cannot edit and the General, Terms, Accounting, Payment, and User tabs.

The header of each contract detail contains the Contract ID. This field can not be edited.

Refer to the following tabs to complete your new contract type.

Entering Information in the General Tab

The General tab includes basic information about the contract type such as description, duration, account manager, Sales Rep ID, and status.

1 If necessary, click the **General** tab.

2 Specify this information on the General tab:

Site ID – If you use multiple sites, click the **Site ID** arrow and select a site for this contract type. You can choose from any of your allowable sites. If you use a single site, the ID of the single site is inserted.

Description – Specify a brief description of the contract type.

Duration – Specify the time span of the contract type. Click the drop-down list beside the Duration field to select Day(s), Week(s), Month(s), Quarter(s), or Year(s).

Status – Click the drop-down list to select the status of the contract type. Choose from **Pending, Active, Hold, Closed** or **Canceled**.

Status Control – Click the drop-down list to select the status control of the contract type. Choose from **Override allowed** or **No override**.

Account Mgr – Click the browse button to select an account manager for the contract type. The Account Mgr browse is filtered by the selected site. Only employees assigned to the specified site are eligible for selection.

Sales Rep ID – Click the browse button to select a Sales Rep ID for the selected contract type. If you use Infor VISUAL 10.0.0 or higher, the look up shows active sales reps only.

3 Click the **Save** toolbar button to save your additions.

Entering Information in the Terms Tab

The Terms tab includes information about the contract type, such as contract terms, the products and services the contract covers, and material and expense markups.

1 Click the **Terms** tab.

2 Select one or more of the following check boxes in the **Covers** section.

These check boxes affect the invoice generation of service orders tied to the contract. Selecting a check box indicates that the contract covers the associated charges and that invoices for service orders tied to the contract should discount to zero for the designated items.

Materials – Select the Materials check box to include materials in the contract.

Labor – Select the Labor check box to include labor in the contract.

Expenses – Select the Expenses check box to include expenses in the contract.

3 Enter information in one or both of the fields in the **Expense Markup** section.

Amount – Specify the dollar amount to be added to the unit cost of expenses for the contract.

Pct – Specify the percentage (decimal format) to be added to the unit cost of expenses for this contract.

4 Click the **Labor Rate** drop-down list to select the rate group you charge for labor for this service.

Labor Rate Groups are collections of labor markup rates that are applied to the hours entered on an associated service order. Labor Rates are user-defined fields that are created in the Labor Rate Group Maintenance window.

5 Click the browse button beside the Terms field to select a discount and net terms to the contract type. Define terms in VISUAL Manufacturing in the Terms Maintenance dialog located in Application Global Maintenance. If you use VISUAL Financials Global Edition, define terms in Terms Rule Maintenance.

6 Click the **Save** toolbar button to save your additions.

Entering Information in the Accounting Tab

The Accounting tab includes a product code, revenue accounts, and Sales Tax ID.

1 Click the **Accounting** tab.

2 Click the browse button beside the **Sales Tax ID** field to specify a Sales Tax ID for the contract type.

The Sales Tax ID provides the default sales tax for line items on associated service orders. Define Sales Tax IDs in VISUAL.

3 Click the drop-down list beside the **Currency** field to select the type of currency the contract type uses for transactions. You can select any currency used by the parent entity of the selected Site ID.

4 Click the drop-down list beside the **Business Unit**/**Division ID**/**Branch ID** fields to choose from a list of Business Units, Divisions, and Branches. These fields allow you to categorize your accounts.

5 Click the **Disc Code** drop-down button to assign a discount code to this contract type.

6 Click the **Product Code** browse button beside the Product Code field to specify a product code for the contract type. Product codes classify the type of products the contract covers. Use product codes to assign groups of parts to specific general ledger accounts.

Define product codes in VISUAL.

7 Enter the following information in the **Revenue Accounts** section. If you set up account browses by site in VISUAL, the Revenue Accounts browse dialogs display the accounts you added to the site filter. You can select an account from the browse, or you can type in any account in your chart of accounts. Define G/L accounts in VISUAL.

Material- Click the **Material** browse button to select a G/L account to deposit material costs for this contract type. If you set up account browse filters in the VISUAL Manufacturing Accounting Window, then the look up is filtered by the site you selected.

Expense – Click the **Expense** browse button to select a G/L account to deposit expenses for this contract type. If you set up account browse filters in the VISUAL Manufacturing Accounting Window, then the look up is filtered by the site you selected.

Labor – Click the **Labor** browse button to select a G/L account to deposit labor costs for this contract type. If you set up account browse filters in the VISUAL Manufacturing Accounting Window, then the look up is filtered by the site you selected.

Contract – Click the Contract browse button to select a G/L revenue account for account receivables postings. If you set up account browse filters in the VISUAL Manufacturing Accounting Window, then the look up is filtered by the site you selected.

8 Click the **Save** toolbar button to save your additions.

Entering Information in the User Tab

The User tab allows you to maintain user-defined fields for each contract type. Create user-defined fields in **Admin > User Defined Fields** from the Navigation Bar.

Editing a Contract Type

After you save a contract type, you cannot edit the Site ID.

1. With the contract type selected in the Contract Types grid, click the **Toggle** button.
2. Edit the necessary information in the Contract Type window. Refer to “Adding a Contract Type”.
3. When you are finished editing the selected contract type, click the **Save** toolbar button.
4. Click the **Toggle** button to return to the Contract Types grid.

Deleting/Undeleting Contract Types

1. Select the contract type(s) you want to delete, then click the **Delete** toolbar button.

   You can also right-click the contract(s) and select **Delete Record(s)** from the menu, or select **Edit**, **Delete Record(s)** from the main menu.
2. If you set up CRM to prompt you when deleting records, click **Yes** to delete the call, or **No** to cancel the deletion in the Record Deletion dialog.
3. With the deleted record selected, you can undelete the record by clicking the **Delete** toolbar button again (as long as you have not saved the record), or select **Edit, Undelete Record(s)** from the main menu.
4. To permanently save your changes, click the **Save** toolbar button, or click the **Yes** button when exiting the grid.

Printing and Exporting Contract Types

Several options to print and export Contract Type information are provided in CRM. Refer to the following chapters for additional information:

- To print a report on all Contract Type records in the Contract Types grid, refer to “Printing All Records in a Grid,” on page 4–22.
- To print a report on a specific Contract Type record, refer to “Printing a Specific Record,” on page 4–22.
- To print preloaded and user-defined reports, refer to “Using the Reports Menu Option,” on page 4–24.
- To export the Contract Types grid or a specific record within the Contract Types grid and save it in a specified format, refer to “Exporting Grid Contents,” on page 3–25.

Using the Contracts Feature

The Contracts feature records service, warranty, and maintenance for an account.

The **Contracts** button on the navigation bar allows you to create and maintain contracts, add line items covered by the contract, and flag contracts for follow-up. The Contracts button has three sub-buttons: **Active Contracts**, **My Contracts** and **My Follow-up Items**. All of the **Contracts** buttons open the same window, but filter data differently. The **Contracts** button opens a grid that includes all contracts entered in CRM within your allowable sites. The **Active Contracts** button opens a grid that lists active contracts. The **My Contracts** button opens a grid that lists only the contracts you enter. The **My Follow-up Items** button that opens a grid that lists contracts you entered that have been flagged for follow-up.

Accessing the Contracts Grid

Expand the Field Service module in the navigation bar by clicking the **+** button beside Field Service, then click the **+** button beside Contracts.

Click the **Contracts, Active Contracts**, or **My Contracts** button.

The Contracts grid is filtered by your allowable sites, and lists basic information about each contract. You can change the way you view information on this grid by using the filter options or customizing your columns. See "CRM Grids" on page 3-22.

The Option bar at the top of the Contracts grid allows you to create and maintain additional information associated with the selected contract. The Contracts Option bar includes **History**, **Tasks**, **Contacts**, **Calls**, **Addresses**, **Service Orders,** and **Items**. Refer to the following:

When you select a contract in the Contracts grid, or when you have the detail of a contract open, you can select any of the following option buttons to view all entries associated with the selected contract.

For all options on the Contracts option bar, refer to "Using the Option Bar," on page 3–39. For the Addresses and Items option button, refer to the appropriate heading within this chapter.

History – Select the History option button to view all the history entries associated with the selected contract.

Tasks – Select the Tasks option button to view all the tasks associated with the selected contract.

Contacts – Select the Contacts option button to view all the contact associated with the selected contract.

Calls – Select the Calls option button to view all the calls associated with the selected contract.

Addresses – For information on how to attach and detach an address, refer to "Attaching an Existing Address to a Contract" and "Detaching and Reattaching Addresses".

Service Orders – Select the Service Orders option button to view all the service orders associated with the selected contract.

Items – For information on the **Items** option, refer to "Adding Contract Line Items to Contracts".

Adding Contracts

Click the **New** toolbar button, or right-click in the Contract grid and select **New Record** from the menu.

The New Contract window includes five tabs: **General**, **Terms**, **Accounting**, **Payment**, and **User**.

Enter the following information in the New Contract window where applicable.

Contract ID – You cannot edit this field. A system-assigned number that uniquely identifies the contract.

Contract Type – Click the **Contract Type** browse button to select a contract type for the new contract. The contract type is a template that assigns predefined contract settings for contracts.

Define contract types in the Field Service module of the navigation bar using the Contract Types feature. See “Using the Contract Types Feature” on page 10-3.

You can choose whether or not you want all information associated with the contract type in the new contract replaced, or you can choose to avoid replacing information already entered in the new contract.

You can automatically populate a contract type when you create a contract by adding a default contract type in the Defaults feature. See “Entering Information in the Contract Tab” on page 13-12.

Review these tabs to add information to the new contract.

Entering Information in the General Tab

The General tab lists the Site ID, the account assigned to the contract, PO Number, the billing address, status, due dates, and payment information for the selected contract.

If you selected a contract type for this contract, all the information in the General tab may automatically populate. To create a contract type, refer to “Adding a Contract Type,” on page 10–3.

1 If necessary, click the **General** tab.

2 Enter the following information in the General tab.

   Site ID – If you use multiple sites, click the **Site ID** arrow and select a site for this contract. You can choose from any of your allowable sites. If you use a single site, the ID of the single site is inserted.

   Account – Click the **Account** button to specify an account for the selected contract. This field is required.

   When you select an account for the Account ID field, you can click the **View Detail** browse button to view account detail in the bottom pane. You must click the **Save** toolbar button before viewing the account detail.

   Address – Use this field if you are contracting with a particular customer location. Click the **Address ID** browse button to select the Address ID associated with the contract.

Bill To – You cannot edit this field. The default Bill To address of the account is automatically populated when the Account ID is selected. If no Bill To address is specified, the billing defaults to the Sold To address for the specified Account ID.

Acct Mgr – Click the browse button to select an account manager for the contract type. The Account Mgr browse is filtered by the selected site. Only employees assigned to the specified site are eligible for selection. The value entered in this field supplies the default account manager for any associated service order.

Maintain account managers in the **Admin > Employees** button on the navigation bar in CRM.

Owner – Click the Owner browse button and select the owner of this contract. The Owner browse is filtered to the selected site.

Description – Specify a brief description of the contract in the field provided.

3 Enter the following contract status and status control information:

Status – Click the drop-down list to select the status of the contract. Choose from **Pending**, **Active**, **Hold**, **Closed**, or **Canceled**. You can apply a default setting to this field in **Admin**, **Defaults** on the navigation bar. This field is required.

When a user assigns a contract to a service order, the contract's Status setting is checked. Only contracts with an Active status are valid for processing. If the contract's status is Pending, Hold, Closed or Canceled, the user is prompted with a "contract not valid" message and does not process the service order.

If a contract is Closed or Cancelled, the system no longer generates invoices based on billing events. If you select Closed or Cancelled when billing events for the contract are outstanding, the system warns you that there are billing events that have not been processed.

Status Ctl – Click the drop-down list to select the status control of the contract. Choose from **Override allowed** or **No override**.

The following status control conditions apply to Active contracts:

- If the contract's status is Active but the user's current system date is not within the contract's Start and End dates, then the Status Control setting is checked. If the Status Control setting is **No override**, then the service order is not processed.
- If the Status Control setting is **Override allowed**, the contract's Start date and End date settings are checked. If the user's current system date is within the start and end dates, the service order is processed. If the user's current system date is not within the start and end dates, the user is prompted with a "contract expired" message and allowed to continue or cancel the operation.

4 Enter sales representative and commission information:

Sales Rep ID – Click the browse button to choose a sales representative for the contract. The value entered in this field supplies the default sales rep for any associated service order. If you use Infor VISUAL 10.0.0 or higher, the list shows active sales reps only.

Create sales representatives in **Tools > Maintain > Sales Reps** on the main menu.

Comm % – Specify the commission that the sales rep earns for the contract. The system inserts the default value specified on the Account record. If the Account record does not have commission information, then the system inserts the default value specified on the Sales Rep record.

5 Enter the following information in the **Contract Date** section:

Start – Click the drop-down list to specify the date the contract becomes effective. The default start date is the current system date when the contract is created.

End – Click the drop-down list to specify a date the contract expires. The current system date is automatically populated when you change the status to **Closed**.

6 Click the **Save** toolbar button to save your additions, or from the main menu select **File, Save**.

Entering Information in the Terms Tab

The Terms tab includes information about the contract type, such as contract terms, the products and services the contract covers, and material and expense markups.

If you selected a contract type for this contract, all the information in the Terms tab may automatically populate.

1 Click the **Terms** tab.

2 Select one or more of the following check boxes in the **Covers** section.

These check boxes affect the invoice generation of service orders tied to the contract. Selecting a check box indicates that the contract covers the associated charges and that invoices for service orders tied to the contract should discount to zero for the designated items.

Materials – Select the Materials check box to include materials in the contract.

Labor – Select the Labor check box to include labor in the contract.

Expenses – Select the Expenses check box to include expenses in the contract.

3 Enter one or both of the fields in the **Expense Markup** section:

Amount – **Specify** the amount to be added to the unit cost of expenses for the selected contract.

Pct – **Specify** a percentage to be added to the unit cost of expenses used for the current contract.

4 Click the **Labor Rate** drop-down list to select the rate group you charge for labor for this service.

Labor Rate Groups are collections of labor markup rates that are applied to the hours entered on an associated service order.

5 Click the **Terms** browse button to select the Terms ID for the contract. Create terms in the Terms Maintenance dialog in VISUAL's Application Global Maintenance. If you use VISUAL Financials Global Edition for .NET, create terms in VISUAL Financials Global EditionTerms Rule Maintenance.

6 Click the **Save** toolbar button.

Entering Information in the Accounting Tab

The Accounting tab includes revenue account information, and tax for the selected contract.

If you selected a contract type for this contract, all the information in the accounting tab may automatically populate.

1 Click the **Accounting** tab.

2 Click the **Sales Tax ID** browse button beside the Sales Tax ID field to specify a Sales Tax ID for the contract.

   The Sales Tax ID provides the default sales tax for line items on associated service orders. Define Sales Tax IDs in VISUAL.

3 Click the drop-down button beside the **Currency** field to select the type of currency the contract uses for transactions. You can select any currency used by the parent entity of the selected Site ID.

4 Click the drop-down button beside the **Business Unit**/**Division ID**/**Branch ID** fields to choose from a list of Business Units, Divisions, and Branches. These fields allow you to categorize your accounts.

   You can create business units, divisions and branches in **Tools > Maintain > General Codes**. See “Maintaining General Maintenance” on page 2-5.

5 Click the **Discount Code** drop-down button to select the discount to apply to the contract. The system inserts the value specified on the Account record. If you did not specify a value on the Account record, the system inserts the value specified for the contract type. You can change the value if necessary.

6 Click the **Product Code** browse button beside the Product Code field to specify a product code for the new contract. Product codes classify the type of products the contact covers. Use product codes to assign groups of parts to specific general ledger accounts.

   Define product codes in VISUAL.

   You can apply a default product code to this field using the Defaults feature. See “Entering Information in the Contract Tab” on page 13-12.

7 Enter the following information in the **Revenue Accounts** section.

   You can assign default accounts for reach of these fields in the Revenue Accounts section. If you set up account browses by site in VISUAL, the Revenue Accounts browse dialogs display the accounts you added to the site filter. You can select an account from the browse, or you can type in any account in your chart of accounts.

   See “Entering Information in the Contract Tab” on page 13-12.

   Material – Click the **Material** browse button to select a G/L account to deposit material costs for this contract. If you set up account browse filters in the VISUAL Manufacturing Accounting Window, then the look up is filtered by the site you selected.

   Expense – Click the **Expense** browse button to select a G/L account to deposit expenses for this contract. If you set up account browse filters in the VISUAL Manufacturing Accounting Window, then the look up is filtered by the site you selected.

Labor – Click the **Labor** browse button to select a G/L account to deposit labor costs for this contract. If you set up account browse filters in the VISUAL Manufacturing Accounting Window, then the look up is filtered by the site you selected.

Contract – Click the **Contract** browse button to select a G/L revenue account for contract billing events. If you set up account browse filters in the VISUAL Manufacturing Accounting Window, then the look up is filtered by the site you selected. If you selected a contract type in the header, the system inserts the Contract Account ID specified for the contract type. If you specified an Account ID for the contract, the system inserts the default Contract account associated with the Account ID. If you did not specify a contract type or Account ID, the system inserts the Contract Account ID specified on the Contract tab in the Defaults window.

8 Click the **Save** toolbar button to save your changes.

Entering Information in the Payment Tab

The Payment tab lists payment information for the contract. The system enables the Payment tab after the Account ID field has been populated on the General tab.

1 Click the **Payment** tab.

2 Use the following fields to create billing events for the contract:

Seq – The system inserts the sequence number for the billing event. You cannot edit this field.

Description – Specify a description for the billing event.

Bill Amt – Specify the gross amount for the billing event. The system will calculate any applicable discounts and taxes based on the amount in the Bill Amt field.

Event Date – Specify the date you want to trigger the system to create an invoice for the billing event.

Disc % – If applicable, specify the discount percentage to apply to the Bill Amt.

Ext Amount – The system calculates this amount as follows: first, the system calculates the amount of the discount by multiplying the discount percentage by the bill amount. Then, the system subtracts the discount amount from the bill amount and inserts the value in the Ext Amount field.

Comm % – Specify the commission percentage that the sales rep earns for the billing event. By default, the system inserts the value you specified in the Comm % field on the Accounting tab.

Rev Acct ID – Specify the revenue account that receives the amount due for the invoice. By default, the system inserts the value you specified in the Contract field on the Accounting tab.

Tax Group ID – This field is visible only if you do not have VAT enabled. Specify the Tax Group ID to apply to the billing event. By default, the system inserts the value you specified in the Sales Tax ID field on the Accounting tab.

VAT Code – This field is visible only if you have VAT enabled. Specify the VAT code to apply to the billing event. By default, the system inserts the value you specified in the VAT code field on the Accounting tab in the Account window.

Invoiced – This field is read-only. If the system has created an invoice for the billing event, it places a check mark in this field.

Inv Date – This field is read-only. If the system has created an invoice for the billing event, it inserts the date of the invoice in this field.

Invoice ID – This field is read-only. If the system has created an invoice for the billing event, it inserts the CRM Invoice ID in this field.

Receivable ID – This field is read-only. If the system has created an invoice for the billing event, it inserts the VISUAL Manufacturing Receivable ID in this field.

The system calculates the Contract Amount, Tax, and Contract Total and displays the amounts under the grid. The Contract Amount is the total billing amount for all lines minus any discount. The system calculates the tax based on the Tax Group ID you selected. The system adds the Contract Amount and Tax amount to calculate the Contract Total.

3 Add additional billing events as necessary.

4 In the **PO** Number field, specify the purchase order number associated with the current contract.

The **Contract Amt**, **Tax**, and **Contract Total** display the sums of the amounts in the billing event table.

5 Click the **Save** toolbar button save your additions, or from the main menu select **File, Save**.

Entering Information in the User Tab

The User tab allows you to maintain user-defined fields for each contract. Create user-defined fields in **Admin > User Defined Fields** from the Navigation Bar.

1 Click the **User** tab.

2 Enter the necessary information in the User tab.

3 Click the **Save** toolbar button.

Adding Contract Line Items to Contracts

You can add one or more contract items to a contract using the Items option button. Items can be moved within one site only. You cannot move contract items from one site to a contract in a second site. Refer to the following procedures for more information.

1 From the Contracts grid or the contract detail record, click the **Items** button on the Option bar.

The Contract Items for Contract pane is filtered by your allowable sites, and contains items that are covered under the selected contract.

Note: To customize column layout, right-click your mouse in the “Contract Items for Contract” pane and select **Columns > Customize** from the menu. See “Customizing Columns” on page 3-31.

2 Click within the Contract Items for Contract pane to activate the window, then click the **New** toolbar button.

You can also right-click within the window and select **New Record** from the menu.

3 The contract line item contains the following two fields in the contract line item header.

Contract Item – This field displays the contract associated with the selected line item. This is a read-only field.

Status – Click the **Status** drop-down list to select the status of this contract item. Select one of these options: **Pending**, **Active**, **Hold**, **Closed**, **Canceled**.

Refer to the tab headings to complete a new contract line item.

Entering Information in the General Tab

1 Click the **General** tab.

The General tab contains the contract date as well as any parts covered under the contract.

2 Enter the following information in the General tab.

Site ID – The Site ID specified on the contract General tab is inserted. You cannot edit this field.

Part – Click the **Part ID** browse button to select a part for the line item. Only parts that exist in the selected site are displayed. If the item you want does not have a Part ID, leave this cell blank and specify a description under the **Description** column.

Trace – Click the **Trace ID** button to select the Trace ID associated with the part, if applicable. Trace IDs are those that correspond to the specified Part ID. The Trace ID browse is filtered by the selected site.

Define Trace IDs in VISUAL.

Qty – Specify the quantity required for this part. This field is required.

Description – Specify any additional information in the Description text box.

3 Enter the following information in the **Contract Date** section.

Start – Click the **Start** calendar button to select the beginning contract date for this contract item.

End – Click the **End** calendar button to select the ending contract date for this contract item.

4 Click the **Save** toolbar button.

Entering Information in the Service Tab

The Service tab contains information about the type of service associated with this contract.

1 Click the **Service** tab.

2 Click the **Service Type** drop-down list to select the type of service that can be performed under contract, such as installation, repair or upgrade.

The Service Type field can be user-defined in **Tools > Maintain > General Codes**.

You can use these user-defined fields to track contract items that use specific service types by customizing and filtering your Contract Items grid.

3 Click the **Service Code** drop-down list to select the service code for this line item, such as offsite, holiday, after hours, etc.

The Service Code field can be user-defined in **Tools > Maintain > General Codes**.

You can use these user-defined fields to track contract items that use specific service codes by customizing and filtering your Contract Items grid.

Click the **Resource** browse button to select the resource used to service this line item, such as help desk, assembly line, or installation team. The browse displays only the resources assigned to the Site ID you selected. The browse also displays only resources not marked as obsolete.

4 Click **Save**.

Entering Information in the User Tab

This tab contains user-defined fields that allow you to add additional information to the Contacts Window. Field labels are created in the **Admin > User Defined Fields** feature in the navigation bar**.** You can add user-defined fields to the Contacts grid for viewing, and use sort and filter options to locate records easily.

Editing Contract Line Items

1 With the appropriate contract selected in the Contracts grid, click the **Toggle** button at the upper left side of the grid. You can also double-click the selected contract.

2 From the contract detail window, click the **Items** option button to open the Contract Items for Contract pane.

3 Select the contract item that you want to edit, then click the **Toggle** button at the upper left side of the grid. You can also double-click the select contract item.

4 Click the **Save** toolbar button after you are finished editing.

5 To return to the Contract Items for Contract grid, click the **Toggle** button.

Deleting/Undeleting Contract Items

1 With the appropriate contract item selected in the Contract Items for Contract grid, click the **Delete** toolbar button, or select **Edit**, **Delete Record(s)** from the main menu.

You can also right-click on the record you want to delete in the Contract Items for Contract grid and select **Delete Record(s)** from the menu.

If you set up CRM to prompt you when deleting records, click **Yes** to delete the call, or **No** to cancel the deletion in the Record Deletion dialog.

2 Click **Yes** to delete the contract item, or **No** to cancel the deletion.

3 With the deleted record selected, you can undelete the record by clicking the **Delete** toolbar button again as long as you have not clicked the **Save** toolbar button, or select **Edit, Undelete Record(s)** from the main menu.

4 To permanently save your changes, click the **Save** toolbar button, or click **Yes** when exiting the grid.

Viewing and Entering Information in the Parts Browser

The Part Details window contains quantity break, order history, and purchase history information for the selected part, as well as inventory, back orders, delivery and substitute part information.

1 From the Contract Items grid, click the **Part ID** link of the part you want to view.

The unit price of the part, product code and commodity code are supplied in the Part Details window.

The Site ID and Part ID from the service order line are inserted. You can change either value. The information displayed in the Parts Browser displayed information related to the selected site only. For example, only the orders created in the selected site are shown in Orders History.

2 The Price Breaks section includes prices breaks for the selected account.

To view price breaks for a different customer, click the browse button beside the Customer field and select a customer from the list.

3 The Order History section includes all orders from all warehouses for the selected part.

You can view orders for the selected part from a specific warehouse by clicking the browse button beside the Warehouse field, then selecting a warehouse from the list.

4 If an order contained multiple shipments, select the **Expand Multiple Shipments** check box to view additional shipments.

5 To view shipments from only the customer displayed in the Customer field, select the **Specified Customer Only** check box.

6 The Purchase History section includes all customers from all warehouses that purchased the selected part.

To view purchase history from a specific warehouse, click the browse button beside the Warehouse field and select the warehouse from the list.

7 Select the **Expand Multiple Receipts** check box to view additional receipt items if the customer received multiple shipments for an order.

8 Click the **Stock** tab.

The user defined fields for the part are supplied in the Stock tab.

9 The Substitute field allows you to replace the selected part with a substitute part.

10 View part inventory for the part from each warehouse in the Inventory section.

11 View back order information for the part from all warehouses in the Back Orders section.

To view back orders from a specific warehouse, click the browse button and select the warehouse from the list.

12 View delivery information for the part from the Delivery section.

To view delivery information from a specific warehouse, click the browse button and select the warehouse from the list.

13 To return to the Quote and Quote Line Items panes, click the **Close** button.

Selecting Substitute Parts

1 With the line item selected, right-click your mouse and select **Parts Browser** from the menu.

2 Click the **Stock** tab.

3 Click the **Substitute** drop-down list to select a substitute part.

Substitute parts must be added in VISUAL.

4 Click the **Switch** button to replace the selected part with the substitute part.

5 Select the **Sales** tab.

6 Enter the number of parts you want to order in the User Qty cell under the **Units** column.

7 Enter the price per part in the User Price cell under the **Units** column.

8 If you want to establish quantity discounts for this part, specify the quantity and price per each quantity ordered.

9 The column headers reflect the quantity breaks you assigned to parts in VISUAL. This is meant to be used as a guide.

10 Click the **Close** button to exit the Part Details window.

Moving a Contract Item

You can move a contract item from one contract to another using the “Move Contract Item” feature. The contract item along with all its associated information, including history entries is automatically transferred. You can move a contract item within one site only. You cannot move a contract item from one site to a contract in a second site. Refer to the following procedures for more information.

1 Select the contract that contains the contract item you want to transfer. You can select the contract from the Contracts grid, or access the contract detail information.

You can also move a contract item from within the Contract Items grid as well.

2 Click the **Items** option bar to view the contract items associated with the selected contract.

3 Select the contract item you want to move in the Contract Items pane, then right-click and select Move Item from the menu.

You can also select **Actions > Move Item** from the main menu.

4 The **Move Contract/Item From** section is automatically populated with the information from the selected contract, however you can change this information.

By changing this information you are accessing a different contract and contract item to move instead of the item you selected. Refer to the following to change the contract and contract item.

Contract – Click the **Contract** button to select a different contract than the one you selected. The Contract browse is filtered by the contract's site.

Line Item – Click the **Line Item** drop-down list to select the line item you want to move that is associated with the contract you selected in the Contract field.

The information associated with the contract and line item you select is automatically populated in the Contract and Line Item fields. The information in this text box is read-only.

5 Click the **Contract** button in the **Move to Contract** section to select the contract you want to move the contract item into. Numbers are automatically assigned to contract items in sequential order. For example, if you move a contract item into a contract that already contains two other contract items, then the contract you are moving will be contract item number three.

When you select the contract in the Contract field of the Move to Contract section, all the information associated with the contract you selected is automatically populated.

6 If you want to create a history entry regarding the move of this contract item, click the **Save History** check box.

7 If you selected the Save History check box, specify the history information in the History text box.

8 Click **OK** to move the selected contract item.

Click **Cancel** to exit the Move Contract Item dialog without moving the contract item.

9 To view the contract item you moved, select the contract that now contains the contract item, then click the **Items** option button.

The contract item you moved should be visible in the contract line items grid.

10 To view the history entry you created, select the contract you moved the contract item to, then click the **History** option button.

The history for the contract item you created should be visible in the History for Contract pane.

Editing Contracts

1 With the appropriate contract selected in the Contracts grid, click the **Toggle** button at the upper left side of the grid. You can also double-click the selected contract.

2 Click the **Save** toolbar button after you are finished editing.

3 To return to the Contracts grid, click the **Toggle** button, or click the appropriate button on the navigation bar.

Deleting/Undeleting Contracts

1 With the appropriate contract selected in the Contracts grid, click the **Delete** toolbar button, or select **Edit**, **Delete Record(s)** from the main menu.

You can also right-click on the record you want to delete in the Contracts grid and select **Delete Record(s)** from the menu.

If you set up CRM to prompt you when deleting records, click **Yes** to delete the call, or **No** to cancel the deletion in the Record Deletion dialog.

2 Click **Yes** to delete the contract, or **No** to cancel the deletion.

3 With the deleted record selected, you can undelete the record by clicking the **Delete** toolbar button again (as long as you have not clicked the **Save** toolbar button), or select **Edit**, **Undelete Record(s)** from the main menu.

4 To permanently save your changes, click the **Save** toolbar button, or click the **Yes** button when exiting the grid.

Flagging Contracts

You are reminded to follow-up on a contract at a specified date when you flag a contract by placing a red flag beside flagged contracts in all the Contracts grids.

1 With the appropriate contract selected, click the **Flag** toolbar button, or right-click within the Contracts grid and select **Flag Contract for Follow-up** from the menu.

2 Click the drop-down list beside the Flag To field to choose the type of follow-up for this contract. Select from **Follow-up**, **Call**, **Arrange Meeting**, **E-mail**, or **Send Letter**.

3 Click the drop-down list beside the Due By field to choose a date by which the follow-up must occur, or specify the date in Windows format.

If you do not want to specify a date, click the drop-down list, then select **None**.

4 Select the **Completed** check box when the follow-up is complete.

Flags in the Contracts grid appear red when open, and gray when closed.

5 To remove a follow-up flag from a contract, click the **Clear Flag** button.

6 After you have entered all information, click **OK** to save changes, or **Cancel** to return to the previous grid without saving changes.

Attaching an Existing Address to a Contract

Click the Addresses pane, then click the **Attach Existing Address to Contract** toolbar button. This toolbar button is only viewable when the Addresses option is activated.

You can also right-click your mouse and select **Attach Existing Address to Contract** from the menu.

The addresses in the Assign Existing Address to Contract window includes all the addresses entered in the Addresses feature of CRM.

Highlight the address, then click **OK** to assign the address to the contract, or **Cancel** to exit the window without attaching an address.

Detaching and Reattaching Addresses

Addresses you create or attach to contracts cannot be deleted because those addresses are added to the Addresses grid in the Addresses feature under the Contact Center module. The addresses you assign to a contract can only be removed from the contract, not from the addresses table. To delete an address, you must access the Addresses grid.

1. Make sure the Addresses For Contract pane is active by clicking anywhere within the pane.
2. Select the address you want to detach by clicking the row header to the left of the row.
3. Click the **Detach Address(es))** toolbar button, or right-click your mouse and select **Detach Address(es))** from the menu.

   If you set up CRM to prompt you when deleting records, click **Yes** to delete the call, or **No** to cancel the deletion in the Record Deletion dialog.
4. With the detached record selected, you can reattach the record (as long as you have not saved the record) by clicking the **Reattach Address(es))** toolbar button again.

   You can also right-click your mouse and select **Reattach Address(es))** from the menu.
5. To permanently save your changes, click the **Save** toolbar button, or click the **Yes** button when exiting the pane.

Accessing Follow-up Items

Follow-up items include all contracts that have been flagged for follow-up.

Expand the Field Service module in the navigation bar by clicking the **+** button beside Field Service, then click the **+** button beside the Contracts feature.

Click the **My Follow-up Items** button.

Printing and Exporting Contracts

Several options to print and export Contract information are provided in CRM. Refer to the following chapters for additional information:

- To print a report on all Contract records in the Contracts grid, refer to “Printing All Records in a Grid,” on page 4–22.

- To print a report on a specific Contract record, refer to “Printing a Specific Record,” on page 4–22..
- To print preloaded and user-defined reports,refer to “Using the Reports Menu Option,” on page 4–24.
- To export the Contracts grid or a specific record within the Contracts grid and save it in a specified format, refer to “Exporting Grid Contents,” on page 3–25.

Using the Contract Items Feature

Contract Items identify what is covered in the contract, such as parts and service. Each contract item is assigned to a contract. You can view and add contract items associated with a contract from the Contracts feature, or you can view all existing contract items in the Contract Items feature. The following chapter explains how to navigate in the Contract Items feature.

The **Contract Items** button on the navigation bar allows you to view and edit contract items, delete and undelete contract items, move a contract item from one contract to another, and access the Parts Browser window. You cannot add a contract item from this feature. To add a contract item, refer to “Adding Contract Line Items to Contracts,” on page 10–13. The **Contract Items** button opens a grid that includes all contract items entered in CRM.

Accessing the Contract Items Grid

Expand the Field Service module in the navigation bar by clicking the **+** button beside Field Service.

Click the **Contract Items** button.

The Contract Items grid is filtered by your allowable sites, and lists basic information about each contract item. You can change the way you view information on this grid by using the filter options or customizing your columns. See “CRM Grids” on page 3-22.

To create a new contract item, refer to “Adding Contract Line Items to Contracts”. You can edit a contract item, delete or undelete a contract item, move a contract item from one contract to another, and access the Parts Browser window.

The Option bar at the top of the Contract Items grid allows you to create and maintain additional information associated with the selected contract item. The Contract Items Option bar includes **Service Orders, Calls**, and **Contract**. Refer to the following:

When you select a contract item in the Contract Items grid, or when you have the detail of a contract item open, you can select any of the following option buttons to view all entries associated with the selected contract item.

For all options on the Contract Items option bar, refer to “Using the Option Bar”. For the Contract option button, refer to the appropriate heading within this chapter.

Service Orders – Select the **Service Orders** option button to view all the service orders associated with the selected contract.

Calls – Select the **Calls** option button to view all the calls associated with the selected contract.

Contract – Select the **Contract** option button to open the contract in which the contract item is associated.

Editing Contract Items

1 With the appropriate contract item selected in the Contract Items grid, click the **Toggle** button at the upper left side of the grid. You can also double-click the selected contract item.

For more information on the field definitions and instructions, refer to “Adding Contracts”.

2 Click the **Save** toolbar button after you are finished editing.

3 To return to the Contract Items grid, click the **Toggle** button, or click the appropriate button on the navigation bar.

Deleting/Undeleting Contract Items

1 With the appropriate contract item selected in the Contract Items grid, click the **Delete** toolbar button, or select **Edit, Delete Record(s)** from the main menu.

You can also right-click on the record you want to delete in the Contract Items grid and select **Delete Record(s)** from the menu.

If you set up CRM to prompt you when deleting records, click **Yes** to delete the call, or **No** to cancel the deletion in the Record Deletion dialog.

2 Click **Yes** to delete the contract item, or **No** to cancel the deletion.

3 With the deleted record selected, you can undelete the record by clicking the **Delete** toolbar button again (as long as you have not clicked the **Save** toolbar button), or select **Edit, Undelete Record(s)** from the main menu.

4 To permanently save your changes, click the **Save** toolbar button, or click **Yes** when exiting the grid.

Viewing and Entering Information in the Parts Browser

You can access the parts browser to view part details as well as specify a substitute part for customer contracts.

1 From the Contract Items grid, click the **Part ID** link of the part you want to view.

The Part Details window contains quantity break, order history, and purchase history information for the selected part, as well as inventory, back orders, delivery and substitute part information.

The unit price of the part, product code and commodity code are supplied in the Part Details window.

2 The Site ID selected on the contract is populated in the Site ID field. To select a different site, click the **Site ID** drop-down arrow and select the site in which the part exists.

3 The information in the Part Details window is applies to the part entered in the Part ID field.

To view information for a different part, click the browse button beside the Part ID field and select a part from the list.

4 The Price Breaks section includes prices breaks for the selected account.

To view price breaks for a different customer, click the browse button beside the Customer field and select a customer from the list.

5 The Order History section includes all orders from all warehouses for the selected part.

You can view orders for the selected part from a specific warehouse by clicking the browse button beside the Warehouse field, then selecting a warehouse from the list.

6 If an order contained multiple shipments, select the **Expand Multiple Shipments** check box to view additional shipments.

7 To view shipments from only the customer displayed in the Customer field, select the **Specified Customer Only** check box.

8 The Purchase History section includes all customers from all warehouses that purchased the selected part.

9 To view purchase history from a specific warehouse, click the browse button beside the Warehouse field and select the warehouse from the list.

10 Select the **Expand Multiple Receipts** check box to view additional receipt items if the customer received multiple shipments for an order.

11 Click the **Stock** tab.

The user defined fields for the part are supplied in the Stock tab.

12 The Substitute field allows you to replace the selected part with a substitute part.

13 View part inventory for the part from each warehouse in the Inventory section.

14 View back order information for the part from all warehouses in the Back Orders section.

To view back orders from a specific warehouse, click the browse button and select the warehouse from the list.

15 View delivery information for the part from the Delivery section.

To view delivery information from a specific warehouse, click the browse button and select the warehouse from the list.

16 To return to the Quote and Quote Line Items panes, click the **Close** button.

Selecting Substitute Parts

1 With the line item selected, right-click your mouse and select **Parts Browser** from the menu.

2 Click the **Stock** tab.

3 Click the **Substitute** drop-down list to select a substitute part.

Substitute parts must be added in VISUAL.

4 Click the **Switch** button to replace the selected part with the substitute part.

5 Select the **Sales** tab.

6 Enter the number of parts you want to order in the User Qty cell under the **Units** column.

7 Enter the price per part in the User Price cell under the **Units** column.

8 If you want to establish quantity discounts for this part, specify the quantity and price per each quantity ordered.

The column headers reflect the quantity breaks you assigned to parts in VISUAL. This is meant to be used as a guide.

9 Click the **Close** button to exit the Part Details window.

Moving a Contract Item

You can move a contract item from one contract to another using the “Move Contract Item” feature. the contract item along with all its associated information, including history entries is automatically transferred. You can move a contract item within one site only. You cannot move a contract item from one site to a contract in a second site. Refer to the following procedures for more information.

1 Select the contract item that you want to transfer. You can select the contract item from the Contract Items grid, or access the contract item detail information.

You can also move a contract item in the Contracts feature. See “Moving a Contract Item” on page 10-17.

2 Right-click the selected contract item and select **Move Item** from the menu.

You can also select **Actions > Move Item** from the main menu.

3 The **Move Contract/Item From** section is automatically populated with the information from the associated contract, however you can change this information.

By changing this information you are accessing a different contract and contract item to move instead of the item you selected. Refer to the following to change the contract and contract item.

Contract – Click the **Contract** button to select a different contract than the one associated with the Contract Item you selected.

Line Item – Click the **Line Item** drop-down list to select the contract item you want to move.

The information associated with the contract and line item you select is automatically populated in the Contract and Line Item fields. The information in this text box is read-only.

4 Click the **Contract** button in the **Move to Contract** section to select the contract you want to move the contract item into. Numbers are automatically assigned to contract items in sequential order. For example, if you move a contract item into a contract that already contains two other contract items, then the contract you are moving will be contract item number three.

When you select the contract in the Contract field of the Move to Contract section, all the information associated with the contract you selected is automatically populated.

5 If you want to create a history entry regarding the move of this contract item, click the **Save History** check box.

6 If you selected the Save History check box, specify the history information in the **History** text box.

7 Click **OK** to move the selected contract item.

Click **Cancel** to exit the Move Contract Item dialog without moving the contract item.

8 To view the contract item you moved, find the contract line item that is now associated with a new contract.

The Contract ID field contains the new contract number.

9 To view the history entry you created, click the Contracts feature.

10 Find the contract that contains the contract item you moved, then click the **History** option button.

The history for the contract item you created should be visible in the History for Contract pane.

Printing and Exporting Contract Items

There are several options to print and export Contract Item information in CRM. Refer to the following chapters for additional information:

- To print a report on all Contract Item records in the Contract Items grid, refer to “Printing All Records in a Grid,” on page 4–22.
- To print a report on a specific Contract Item record, refer to “Printing a Specific Record,” on page 4–22.
- To print preloaded and user-defined reports, refer to “Using the Reports Menu Option,” on page 4–24.
- To export the Contract Items grid or a specific record within the Contract Items grid and save it in a specified format, refer to “Exporting Grid Contents,” on page 3–25.

Using the Service Orders Feature

A Service Order is an account's request to perform service. A Service Order records information about a service engagement or action for an account, and includes line items that list operation, material, expense, and labor detail.

When a service order is saved, a work order header is created with an operation card. The ID for the new service work order is the same as in CRM, and lists general information from the service order. A service order contains line items for the costs incurred in the process of delivering the service. The service work order line items separate into three different types: operations, materials and labor. The operations become operation resources for the service work order. The materials become service work order material requirements. The labor items become labor tickets tied to the appropriate resource and charged against the work order.

Service items are eligible for invoicing when their status is "Closed" and they contain billable line items.

The **Service Orders** button on the navigation bar allows you to create service orders, maintain service orders, and flag service orders for follow-up.

The **Service Orders** button has four sub-buttons: **My Service Orders**, **Released Service Orders, Closed Service Orders** and **My Follow-up Items**. All of the **Service Orders** buttons open the same window, but filter data differently. The Service Orders button opens a grid that includes all service orders entered in CRM within your allowable sites. The **My Service Orders** button opens a grid that lists active service orders within your allowable sites. The **Released Service Orders** button opens a grid that lists released service orders within your allowable sites. The **Closed Service Orders** button opens a grid that lists only the service orders that have a closed status within your allowable sites. The **My Follow-up Items** button opens a grid that includes service orders you entered that have been flagged for follow-up.

The **Invoice** button creates a batch for all service items, billable calls, and contract payment lines triggered by payment date. This batch matches the criteria you specify in the Invoice Service Items window, and creates accounts receivable invoices for the batch. The actual accounts receivable functionality occurs in VISUAL, so each CRM invoice has a corresponding VISUAL Financials receivable.

Accessing the Service Orders Grid

Expand the Field Service module in the navigation bar by clicking the **+** button beside Field Service, then click the **+** button beside the Service Orders feature.

Click any of the service order buttons that contain the information you want to view.

The Service Orders grid is filtered by your allowable sites, and lists basic information about each service order. You can change the way you view information in this grid by using filter options or customizing columns. See "CRM Grids" on page 3-22..

To view the service order detail, refer to "Editing Service Orders". To create a new service order, refer to "Adding Service Orders".

To add line items to a service order, refer to "Adding Line Items to a Service Order".

Service Orders that have already been invoiced cannot be edited.

The Option bar at the top of the Service Orders grid allows you to create and maintain additional information associated with the selected service order. The Service Orders Option bar includes **History**, **Tasks, Details**, **Calls** and any application you add from the App Builder module. For information on the Details option, refer to "Adding Line Items to a Service Order" on page 10–37. For all other options on the Service Orders option bar, refer to "Using the Option Bar" on page 3–39

Adding Service Orders

From the Service Orders grid, click the **New** toolbar button, or right-click your mouse and select **New Record** from the menu.

The New Service Order window includes: **General, Service, Location, Accounting**, **Follow-up**, and **User**.

Enter the following information in the New Service window where applicable.

Order ID – A system-assigned number that uniquely identifies the service order. You cannot edit this field. However, you can add a work order prefix. See “Entering information on the Srvc Order Tab” for more information.

Status – Click the drop-down list to select the status of the service order. Choose from **Unreleased**, **Firmed**, **Released**, **Hold**, **Closed**, **Canceled**, or **Invoiced**. You can apply a default setting to this field in **Admin > Defaults** on the navigation bar. This field is required.

Depending on the status of the contract you selected, you may not be allowed to edit the status of the service order.

Specifications – The **Specifications** toolbar button allows you to enter specifications for the selected service order.

If the **Specifications** icon in the New Service Order or Service Order window is active, specifications exist for the selected service order. If the **Specification** icon is inactive, no specifications exist for the selected service order.

To add specifications, click the **Specifications** toolbar button.

If you generate an invoice with specifications, the specifications appear on the invoice.

Refer to the following tabs when adding information to the new service order.

Entering Information in the General Tab

The General tab lists general service order information, such as account name, service status, and priority. You are required to assign an account name to a service order, but you can also assign a specific Contract ID, contract line item, Part ID, or Trace ID. This is helpful for reporting and tracking purposes.

1 If necessary, click the **General** tab.

To specify information in the General tab, refer to the section that applies to your service order:

- To assign an Account ID to a service order, see “Assigning an Account to a Service Order”
- To assign a contract to a service order, see “Assigning a Contract to a Service Order”
- To assign a contract line item to a service order, see “Assigning a Contract Line to a Service Order”
- To assign a Part ID to a service order, see “Assigning a Part ID to a Service Order”
- To assign a Trace ID to a service order, see “Assigning a Trace ID to a Service Order”

Assigning an Account to a Service Order

The General tab lets you create a new service order and assign it to an account without selecting an item (Contract, Contract Item, Part ID, or Trace ID) from the Lookup field.

To assign an account to a service order:

1 If necessary, click the **General** tab.

2 If you use multiple sites, click the **Site ID** arrow and select the site to use for this service order. You can select from any of your allowable sites. If you use a single site, the ID of your site is inserted.

3 Leave the Lookup list and Lookup box blank.

4 Click the **Account** button beside the Account field to specify an account for the service order. This field is required.

The information in the text box at the bottom of the General tab lists the description of the contract, status, start and end dates, the services the contract covers, and the address associated with the account.

If the Account you selected is past due on payments, you are alerted of the account payment status. A past due payment is determined by comparing the “Recv Age Limit” field in the Account to the oldest unpaid invoice.

In the dialog, click **Yes** to continue creating a new service order for the selected account, or if you do not want to create a new service order, click **No**.

After you select an account for the service order, click the **View Detail** button to view account detail in the bottom pane. You must click the **Save** toolbar button before viewing the account detail.

5 Specify any comments for the service order in the text box provided.

6 In the Priority drop-down list, select the priority of the service order.

Define Priorities in **Tools > Maintain > General Codes** in the main menu. See “Maintaining General Maintenance”.

7 Click the **Save** toolbar button to save your additions.

Assigning a Contract to a Service Order

The Lookup feature on the General tab lets you assign a specific contract to a service order.

To assign a contract to a service order:

1 If necessary, click the **General** tab.

2 If you use multiple sites, click the **Site ID** arrow and select the site to use for this service order. You can select from any of your allowable sites. If you use a single site, the ID of your site is inserted.

3 In the Lookup list, select **Contract**.

4 In the Lookup box, click the **Lookup** button.

5 Select a Contract ID from the Select a Contract grid.

   The Contract grid is filtered by the selected site.

   Only "active" contracts are valid and the user's current system date must be within the contract's Start Date and End Date, unless the contract has a Status Control setting of "Override allowed."

6 Click **OK** to continue creating a new service order or click **Cancel** to close the Select a Contract grid without selecting a Contract ID.

   On the General tab, the Account and Comments fields automatically populate with information from the selected contract.

7 If necessary, click **Account** beside the Account field to specify an account for the service order. This field is required.

   The information in the text box at the bottom of the General tab lists the description of the contract, status, start and end dates, the services the contract covers, and the address associated with the account.

   If the Account ID you selected is past due on payments, you are alerted of the account payment status. A past due payment is determined by comparing the "Recv Age Limit" field in the Account to the oldest unpaid invoice.

   In the dialog, click **Yes** to continue creating a new service order for the selected account, or if you do not want to create a new service order, click **No**.

   After you select an account for the service order, click the **View Detail** button to view account detail in the bottom pane. You must click the **Save** toolbar button before viewing the account detail.

8 Specify comments for the service order in the text box provided.

9 In the Priority drop-down list, select the priority of the service order.

   Define Priorities in **Tools > Maintain > General Codes** in the main menu. See "Maintaining General Maintenance".

10 Click the **Save** toolbar button to save your additions.

Assigning a Contract Line to a Service Order

The Lookup feature on the General tab lets you assign a specific contract line item to a service order.

To assign a line item to a service order:

1 If necessary, click the **General** tab.

2 If you use multiple sites, click the **Site ID** arrow and select the site to use for this service order. You can select from any of your allowable sites. If you use a single site, the ID of your site is inserted.

3 In the Lookup list, select **Contract Item**.

4 In the Lookup box, click the **Lookup** button.

5 Select a Contract ID/line from the Select a Contract Line grid.

6 Click **OK** to continue creating a new service order or click **Cancel** to close the Select a Contract grid without selecting a contract line.

7 Click **Account** beside the Account field to specify an account for the service order. This field is required.

   The information in the text box at the bottom of the General tab lists the description of the contract, status, start and end dates, the services the contract covers, and the address associated with the account.

   If the Account ID you selected is past due on payments, you are alerted of the account payment status. A past due payment is determined by comparing the “Recv Age Limit” field in the Account to the oldest unpaid invoice.

   In the dialog, click **Yes** to continue creating a new service order for the selected account, or if you do not want to create a new service order, click **No**.

   After you select an account for the service order, click the **View Detail** button to view account detail in the bottom pane. You must click the **Save** toolbar button before viewing the account detail.

8 Enter any comments for the service order in the text box provided.

9 In the Priority drop-down list, select the priority of the service order.

   Define Priorities in **Tools > Maintain > General Codes** in the main menu. See “Maintaining General Maintenance” on page 2-5.

10 Click the **Save** toolbar button to save your additions.

Assigning a Part ID to a Service Order

The Lookup feature on the General tab lets you assign a specific Part ID to a service order.

To assign a Part ID to a service order:

1 If necessary, click the **General** tab.

2 If you use multiple sites, click the **Site ID** arrow and select the site to use for this service order. You can select from any of your allowable sites. If you use a single site, the ID of your site is inserted.

3 In the Lookup list, select **Part ID**.

4 In the Lookup box, click the **Lookup button**.

5 The Select a Part grid is filtered by the selected site. Select a Part ID.

6 Click **OK** to continue creating a new service order or click **Cancel** to close the Select a Contract grid without selecting a Part ID.

7 Click **Account** beside the Account field to specify an account for the service order. This field is required.

The information in the text box at the bottom of the General tab lists the description of the contract, status, start and end dates, the services the contract covers, and the address associated with the account.

If the Account ID you selected is past due on payments, you are alerted of the account payment status. A past due payment is determined by comparing the “Recv Age Limit” field in the Account to the oldest unpaid invoice.

In the dialog, click **Yes** to continue creating a new service order for the selected account, or if you do not want to create a new service order, click **No**.

After you select an account for the service order, click the **View Detail** button to view account detail in the bottom pane. You must click the **Save** toolbar button before viewing the account detail.

8 Enter any comments for the service order in the text box provided.

9 In the Priority drop-down list, select the priority of the service order.

Define Priorities in **Tools > Maintain > General Codes** in the main menu. See “Maintaining General Maintenance.”

10 Click the **Save** toolbar button to save your additions.

Assigning a Trace ID to a Service Order

The Lookup feature on the General tab lets you assign a traceable part to a service order.

To assign a traceable part to a service order:

1 If necessary, click the **General** tab.

2 If you use multiple sites, click the **Site ID** arrow and select the site to use for this service order. You can select from any of your allowable sites. If you use a single site, the ID of your site is inserted.

3 In the Lookup list, select **Trace ID**.

4 In the Lookup box, click the **Lookup** button.

5 The Select a Trace ID grid is filtered by the selected site. Select a Part ID.

6 Click **OK** to continue creating a new service order or click **Cancel** to close the Select a Trace ID grid without selecting a traceable part.

7 Click the **Account** button beside the Account field to specify an account for the service order. This field is required.

The information in the text box at the bottom of the General tab lists the description of the contract, status, start and end dates, the services the contract covers, and the address associated with the account.

If the Account ID you selected is past due on payments, you are alerted of the account payment status. A past due payment is determined by comparing the Recv Age Limit field in the Account to the oldest unpaid invoice.

In the dialog, click **Yes** to continue creating a new service order for the selected account, or if you do not want to create a new service order, click **No**.

After you select an account for the service order, click the **View Detail** button to view account detail in the bottom pane. You must click the **Save** toolbar button before viewing the account detail.

8 Specify your comments for the service order in the text box provided.

9 In the Priority drop-down list, select the priority of the service order.

Define Priorities in **Tools > Maintain > General Codes** in the main menu. See “Maintaining General Maintenance”.

10 Click the **Save** toolbar button (or from the main menu, select **File, Save**) to save your additions.

Entering Information in the Service Tab

The Service tab includes follow-up, dates, and sales rep information.

1 Click the **Service** tab.

2 Enter the following information in the Service tab.

Service Type – Click the drop-down list to choose the type of service required for the selected service order.

If you are creating a service order from a contract item, the contract service type automatically populates in this field.

You can assign a service type default to this field using the **Admin > Defaults** feature accessible from the CRM navigation bar. However, if you have assigned a contract item that contains a service type, this default will be replaced with the contract item service type.

Create Service Types in **Tools > Maintain > General Codes** in the main menu. See “Maintaining General Maintenance” on page 2-5.

Service Code – Click the drop-down list to select the code for the service associated with the current service order.

If you are creating a service order from a contract item, the contract service code automatically populates in this field.

You can assign a service type default to this field using the **Admin > Defaults** feature accessible from the CRM navigation bar. However, if you have assigned a contract item that contains a service type, this default will be replaced with the contract item service type.

Create Service Codes in **Tools > Maintain > General Codes** in the main menu.

Account Mgr – Click the **Account Mgr** browse button to select an account manager for the service order. The Account Mgr browse is filtered by the selected site. Only employees assigned to the specified site are eligible for selection.

Maintain account managers in the **Admin > Employees** button on the navigation bar in CRM.

You can assign a default account manager in **Admin > Defaults**. See “Maintaining Defaults” on page 13-3.

Sales Rep ID – Select the browse button to choose a sales representative for the service order. If you use Infor VISUAL 10.0.0 or higher, the look up shows active sales reps only.

Create sales representatives from the main menu in **Tools > Maintain > Sales Reps**.

Commission % – Specify a commission percentage in the field provided. When you create an invoice, the commission percentage is displayed on the line items.

Account PO – Specify the account purchase order.

Owner – Click the Owner browse button and select the owner for this service. The Owner browse is filtered by the site selected on the General tab.

Issue Material – Select this check box to automatically issue material from inventory.

You can apply a default issue material selection for this check box using the **Admin > Defaults** feature.

Bill Line Items – Select this check box to bill service order line items to customers.

If you associated the service order with a contract in the General tab, the system clears this check box. If you select this check box when the service order is associated with a contract, then the system bills for the service order separately from the contract. Selecting this check box when the service order is associated with a contract indicates that the service order is not covered by the contract.

You can apply a default bill line items selection for this check box using the **Admin > Defaults** feature.

3 Enter the following information in the **Dates** section:

Open – Click the down arrow to choose a date the service order opened. This field is automatically populated with the current system date. This field is required.

Close – Click the down arrow to choose the date the service order was closed or canceled. This field is updated when the service order status is closed or canceled with the system date.

Request Start – Click the down arrow to choose a requested start date for servicing the account. The request start date is optional.

The Req Start cell on the line item’s Operations tab is automatically populated with the date you specify in this field.

Request End – Click the down arrow to specify the requested date for servicing to finish. The request end date is optional.

The Req End cell on the line item’s Operations tab is automatically populated with the date you specify in this field.

Labor Start – From the Labor Start drop-down calendar, select the estimated date when labor begins. This is the default date for the Act Start date in the Service Order Costs Operations grid.

Labor End – From the Labor End drop-down calendar, select the estimated date when labor finishes. This is the default date for the Act End date in the Service Order Costs Operations grid.

4 Click the **Save** toolbar button to save your changes.

Entering Information in the Location Tab

The Location tab includes the service address and contact information.

1 Click the **Location** tab.

2 Click the **Address** browse button in the Address field to select an address for the account on this service order. This is the address where the service technician will perform the service.

After you select an Address, the address is automatically populated in the Address Info text box below.

Note: To add a new address on the fly, click the ***Browse*** button, click the ***New*** button at the top of the Select an Address dialog; then specify an address in the New Address Entry dialog.

Click the **View Detail** button after you select the address to view account details. You must click the **Save** toolbar button before you can view account details.

3 Click the **Contact** browse button beside the Contact field to specify a site contact. The contact selected in this field will be the primary contact for the service technician.

After you select a contact, the site address is automatically populated in the Contact Info text box.

Note: To quickly add a new contact, click the **Contact** button, click the **New** button at the top of the Select a Contact dialog; then add the contact in the New Contact Wizard. For more information on the New Contact Wizard, refer to “Using the New Contact Wizard,” on page 4–12.

Click the **View Detail** button after you select the Address to view contact details. You must click the **Save** toolbar button before you can view contact details.

4 Click the **Save** toolbar button to save your additions.

Entering Information in the Accounting Tab

The Accounting tab includes revenue account information, markup information, product code, and tax.

1 Click the **Accounting** tab.

If the service order has an associated contract, the Revenue Account fields are automatically populated. If you have defaults set for new service orders in the Admin feature, those fields are automatically populated as well. You can override these defaults if necessary.

2 The system inserts a sales tax based on the following hierarchy:

If a sales tax group has been assigned to a particular Part ID/Customer ID/Ship to ID combination on the quote line or service line, the system uses this tax group. This value is defined in Sales Tax Group by Part ID dialog in Part Maintenance.

If the Part ID/Customer ID/Ship to ID sales tax group value is not defined, the system uses the sales tax group that has been assigned to a particular Part ID/Customer ID combination. This value is defined in Sales Tax Group by Part ID dialog.

If the Part ID/Customer ID sales tax group value is not defined, the system uses the sales tax group that has been assigned to the part. This value is defined on the Accounting tab in Part Maintenance.

If the default sales tax group has not been assigned in Part Maintenance, the system uses the Sales Tax Group ID defined for the Customer ID/Ship to ID combination. This value is defined in the Shipping Addresses dialog in Customer Maintenance.

If the Customer ID/Ship to ID sales tax group value is not defined, the system uses the default sales tax group defined on the customer record. This value is defined on the Accounting tab in Customer Maintenance.

Click the down arrow beside the Currency field to select the type of currency used for this service order. You can select any currency used by the parent entity of the selected Site ID.

3 Click the down arrow to select a Business Unit, Division, and Branch in their respective fields.

These fields classify your service orders and can be used in filtering grids and printing customized reports.

4 Click the **Product Code** button beside the Product Code field to specify a product code for the selected service order. Use product codes to assign groups of parts to specific general ledger accounts.

Create and maintain product codes in VISUAL.

You can apply a default product code to this field using the **Admin > Defaults** feature.

5 Click the down arrow beside the **Discount** field to select the type of discount to be applied to this service order.

6 Enter the following information in the **Revenue Accounts** section.

You can apply a default revenue account to each of these fields in the Revenue Accounts section using the **Admin > Defaults** feature.

If you set up account browses by site in VISUAL, the Revenue Accounts browse dialogs display the accounts you added to the site filter. You can select an account from the browse, or you can type in any account in your chart of accounts.

Material – Click the **Material** button to select a G/L account for material expense on this service order. G/L accounts are defined in VISUAL Financials.

Expense – Click the **Expense** button to select a G/L account for expense for this service order. G/L accounts are defined in VISUAL.

Labor – Click the **Labor** button to select a G/L account for labor expense on this service order. G/L accounts are defined in VISUAL.

7 Enter the following information in the **Expense Markup** section.

Amount – *Specify* the expense markup amount in the Amount field.

Pct – Specify the expense markup percentage in the Percent field.

8 Click the **Save** toolbar button to save your changes.

Entering Information in the Follow-Up Tab

The Follow-Up tab allows you define how follow-up tasks generate after a service order is completed and closed. If the follow-up function is selected, a task for the assigned employee is automatically created when the service order status changes from “Open” to “Closed.”

1 Click the **Follow-up** tab.

2 Enter the following information in the **Follow-up** tab.

You can assign defaults to each of the following fields within the Follow-up tab by accessing **Admin > Defaults** from the CRM navigation bar.

Auto Generate – Select this check box to automatically generate a task assigned to an employee on a specified date.

After Close – Specify the number of days after the close date to follow-up on the service order. This number is added to the service order close date to get the open date for the task record.

Assign To – Click the **Assign To** button to select an employee to follow-up on the service order at the specified date. This field is optional to generate a follow-up task, but required to close the call.

3 Click the **Save** toolbar button.

Entering Information in the User Tab

The User tab allows you to add user-defined fields to your service order. Create user-defined fields in **Admin > User Defined Fields** from the Navigation Bar.

1 Click the **User** tab.

2 Enter the necessary information in the User tab.

3 Click the **Save** toolbar button.

If you created a service order for an account that is not yet a customer (shared with VISUAL customer database), the following dialog is displayed dialog. Depending on your user settings, you may be able to add the account to a customer on the fly.

A system assigned Customer ID number is automatically entered, however you can specify a different number if you want.

4 Click **OK** to add the account to VISUAL

5 Click the **Toggle** button to exit the New Service window and return to the Service Orders grid.

To generate invoices for service orders, refer to “Items Eligible for Invoicing,” on page 10–49.

Adding Line Items to a Service Order

Select the appropriate service order from the Service Orders grid.

Click the **Details** button on the option bar.

The Line Items For Service Order pane is filtered by your allowable sites, and contains the following tabs: **Operation**, **Material**, **Expense,** and **Labor**. Refer to the following tabs to add line items to the selected service order.

Note: To customize column layout on the Operation, Material, Expense, or Labor tabs, right-click your mouse in a column and select **Columns > Customize** from the menu. See “Customizing Columns” on page 3-31.

Entering Information in the Operation Tab

The Operation tab allows you to specify multiple operations for each service order. An operation is a step or process needed to complete servicing in the service order.

1. Click the **Operation** tab.
2. Enter the following information in the Operation Tab:

   When adding line items, click the appropriate cell or press the **Tab** key on your keyboard to specify information.

   Ln – You cannot edit this field. The number of lines in the Operation tab are automatically assigned in sequential order.

   Seq # – Indicates the order in which the operations are performed. The first operation is automatically entered as 10, the next as 20 and so on. You can edit these sequences if necessary. The Seq # it required.

   Resource ID – Categorizes the type of operation to be performed. Resource ID is populated with resources and employees assigned to the resources and filtered by site.

   Click the cell, and then click the **Resource** button to select the resource used to service this line item, such as help desk, assembly line, or installation team. The browse displays only the resources assigned to the Site ID you selected and not marked as obsolete in Shop Resource Maintenance in VISUAL.

   Description – The resource description. When you select a Resource ID in the Resource ID field, this cell is automatically populated with the resource description.

   Assign To – The employee assigned to perform the operation.Click the field, then click the **Assign To** button to select an employee to perform the operation. The Assign To browse is filtered to the site selected in the service order. Select an employee and the labor rate cell is populated with the billing rate of the associated employee and resource. You can modify the billing rate in the **Admin > Employees > Skills** tab.

   Req Start – Click the field, then click the **Req Start** button to select a requested start date from the calendar, or specify the requested start date (in 00/00/00 format) or time (in 00:00 AM/PM format) in the Req Start field.

   When you tab into the Req Start cell, the cell is automatically populated with the date you entered in the Request End field on the service order’s Service tab.

Req End – Click the field, then click the **Req End** button to select a requested start date from the calendar, or specify the requested start date (in 00/00/00 format) or time (in 00:00 AM/PM format) in the Req Start field.

When you tab into the Req End field, the field is automatically populated with the date you entered in the Request End field on the service order's Service tab.

Est Start/ Est End – To edit the Est Start, or Est End fields, click the appropriate field and specify the date or time.

Est. Hrs – Specify the number of estimated hours required to complete the selected operation.

Start Time – Specify the start time (in 00:00 AM/PM format) of the operation.

End Time – Specify the end time (in 00:00 AM/PM format) of the operation.

Labor Rate – The billing rate of the employee selected to perform the operation. the Labor Rate cell is automatically populated when you select an employee in the Assign To field.

Define labor rates in the Employees feature. See "Adding Employees" on page 13-18.

Disc % – Specify a discount percentage to be used in the calculation of the final price for this line item.

Est Amt – You cannot edit this cell. This cell is automatically populated when you save the record using the Est Hrs, Labor Rate, and Disc % columns.

Tax Group – Click the **Tax Group** button to choose from a list of tax groups. The selected sales tax will be used to calculate the final price of the line item.

The sales tax default is the value entered in the Sales Tax ID on the Service Order Accounting tab. Tax groups are defined in VISUAL.

Commission % – Specify the commission percentage for this operation, if applicable.

The Commission % cell is automatically populated if you specified a default on the service order Service tab.

Bill? – Select the check box in the appropriate field under the Bill? column to include this line item on the invoice for billing.

Revenue G/L – Click the **Revenue G/L** button to select a G/L account for this line item. The Revenue G/L browse is filtered by the selected site on the service order if you set up account browses by site in VISUAL.

This field is automatically populated when a G/L account is entered in the Account window on the Accounting tab.

Act Start/Act End – You cannot edit these fields. These cells automatically update using the dates from associated Labor lines. Act Start reflects the transaction date of the first associated labor line and Act End reflects the transaction date of the last associated labor line.

Actual Hours – You cannot edit this field. This cell is automatically populated using the Act Start and Act End information.

Actual Amount – You cannot edit this field. This cell is automatically populated when you save the record using the Actual Hours, Labor Rate, and Disc % information.

Service ID – Click the **Service ID** button to select a Service ID from the list. Service IDs indicate the type of service that is rendered. Each Service ID contains a description of the service, the servicing vendor, and the costs associated with the vendor.

Define Service IDs in VISUAL.

Site ID – You cannot edit this field. This field contains the Site ID selected on the General tab.

Specifications for Operation Line *<line #>* – Specify any specifications or instructions that may be required to complete the operation.

The information you specify in this text box is displayed on the invoice in the Comments for Operation.

3 Click the **Actual/Estimate** button view actual or estimated labor, material, and expense totals.

4 To create additional operations, click the **Insert** button to the left of the line item to insert another row, or click in the next available field under the **Seq #** column.

5 Click the **Save** toolbar button.

Entering Information in the Material Tab

Use the Material tab to specify materials needed to perform specific operations on the selected service order. Each line item in the grid is added to the service work order as a new material requirement.

1 Click the **Material** tab.

2 Click the appropriate cell under the **Seq #** column.

3 To add materials to a specific operation, click the **Seq#** button to choose from a list of operations entered in the operation tab. The Seq # is required.

When an operation is selected, the Seq. Description field is automatically populated with the operation description.

4 Enter the following information in the Material tab where applicable.

When adding line items, click the appropriate field or press the **Tab** key on your keyboard to specify information.

Ln – You cannot edit this field. The number of lines in the Operation tab are automatically assigned in sequential order.

Part ID – Click the **Part ID** button to choose from a list of parts. The Part ID browse is filtered to the site selected in the service order. If you use VISUAL 10.0.0 or higher, the grid is also filtered to show active parts that can be used in work orders.

The description of the part is automatically entered in the Part Description cell if a part is selected from the part list.

Part Description – Click the field and specify a description of the item necessary for service. This cell is automatically populated if you select a part from the Part ID field.

Est Qty – Specify the estimated quantity of the material required for this service.

Warehouse – Click the **Warehouse** button to choose from a list of warehouses. The Warehouse ID browse is filtered to the site selected in the service order. If a product is selected in the Part ID field, the information is automatically populated in the Warehouse field.

Create warehouse entries in VISUAL.

Location – You cannot edit this field. If you select a part in Part ID cell, the information is automatically populated under the Location field.

Create location entries in VISUAL.

Unit Price – This field is populated using the same algorithm as VISUAL's Customer Order Entry unit pricing. You can modify this field.

This value is the sum of the Material Unit Cost, Labor Unit Cost, Burden Unit Cost, Service Unit Cost, and Fixed Cost fields from the VISUAL Part table.

Discount % – Specify a discount percentage to the selected material. The discount percentage is calculated in the final price for this line item.

Est Amount – You cannot edit this field. The Est Amount cell is automatically populated using the Est Qty, Unit Price, and Discount % fields.

Sales Tax – Click the **Sales Tax** button to choose from a list of tax groups. The selected sales tax will be used to calculate the final price of the line item.

The sales tax default is the value entered in the Sales Tax ID on the Service Order Accounting tab. Tax groups are defined in VISUAL.

Commission % – Specify the commission percentage for this line item, if applicable. The default for the commission percentage is the value in the Commission % field on the Service tab of the Service Order.

Bill – Select the check box in the appropriate field under the Bill cell to include this line item on the invoice for billing.

Revenue G/L – This field is automatically populated when a G/L account is entered in the Account window on the Accounting tab. To edit the account, click the **Revenue G/L** button to choose from a list of G/L accounts.The Revenue G/L browse is filtered by the selected site on the service order if you set up account browses by site in VISUAL.

Service Date – Specify the service date for this line item.

The service date from the Operation tab is automatically entered. To change the service date, click the **Service Date** button and select a date.

Issue? – Select the check box in the appropriate field under the Issue? cell to automatically issue material from inventory.

Qty to Iss – Specify the quantity to issue of this line item.

Act Qty – You cannot edit this field. The actual quantity of this line item is inserted.

Act Amount – You cannot edit this field. The actual amount of this line item is inserted.

Trans ID – You cannot edit this field. This is the inventory transaction ID.

Vat Code – Click the browse button and select the VAT code to use for this line item.

Pc Trk – If this line item contains a piece tracked part, click the browse button and select the piece tracking information.

 # Pieces – If this line item contains a piece tracked part, the # Pieces field is automatically populated with the number of pieces of the piece tracked part.

Length – If this line item contains a piece tracked part, the Length field is automatically populated with the length of the piece tracked part.

Width – If this line item contains a piece tracked part, the Width field is automatically populated with the width of the piece tracked part.

Height – If this line item contains a piece tracked part, the Height field is automatically populated with the height of the piece tracked part.

Dimensions – If this line item contains a piece tracked part, the Dimensions field is automatically populated with the dimensions of the piece tracked part.

Site ID – You cannot edit this field. This field contains the Site ID selected on the General tab.

Specifications for Material Line *<line #>* – Specify any specifications or instructions for this material line item.

The information you specify in this text box is displayed on the invoice in the Comments for Material.

5 Click the **Actual/Estimate** button view actual or estimated labor, material, and expense totals.

6 To add additional materials, click the **Insert** button to the left of the line item to insert another row.

7 Click the **Save** toolbar button.

Entering Information in the Expense Tab

The Expense tab includes expenses incurred that are associated with the service that are not materials or labor, such as meals, airfare, lodging, etc.

When you invoice the service order, AP vouchers will be created for each line item in the Expense tab.

1 Click the **Expense** tab.

2 Enter the following information in the Expense tab where applicable.

When adding line items, click the appropriate field or press the **Tab** key on your keyboard to specify information.

Ln – You cannot edit this field. The number of lines in the Expense tab are automatically assigned in sequential order.

Expense ID – Click the appropriate field under the Expense ID cell.

Click the **Expense ID** button to choose from a list of expenses. If the expense is not an option in the Expenses list, skip the Expense ID field and specify a description of the expense in the Description field.

Create and maintain Expense IDs from the main menu in **Tools > Maintain > General Codes**.

Description – Specify a description of the expense. If you selected an expense from the Expense ID field, the description of the expense is automatically populated.

Est Qty – Specify the estimated number of items for an expense.

Unit Cost – Specify the unit cost of the expense item.

The Unit Cost field is automatically populated when you select an Expense ID.

Currency – Click the **Currency** button to select to choose the type of currency the expense item uses. You can select any currency used by the parent entity of the selected Site ID.

Markup % – Specify the markup percentage for the amount of this expense. The amount entered in this field is added to the extended cost for this line item to determined final price.

If a Contract ID is specified on the service order, the default for this field is the Expense Markup Percent on the contract.

Markup $– Specify the markup amount in dollars for this material in the Markup $ cell. The amount entered in this field is added to the extended cost for this line item to determine final price.

If a Contract ID is specified on the service order, the default for this cell is the Expense Markup Amount on the contract.

Unit Price – You cannot edit this field. The estimated price of the expense is automatically populated based on the Unit Cost and Markup %.

Discount % – Specify a discount for this line item in the field provided. The discount is included in the final price of the line item.

Est Curr Amount – You cannot edit this field. The estimated price of the expense is automatically populated based on the Est Qty, Unit Cost, Markup %, Markup $, and Discount %.

Est Amount – You cannot edit this field. The estimated price of the expense is automatically populated based on the Est Qty, Unit Cost, Markup %, Markup $, and Discount %.

Tax Group – Click the **Tax Group** button to choose from a list of tax groups. The selected sales tax will be used to calculate the final price of the line item.

The sales tax default is the value entered in the Sales Tax ID on the Service Order Accounting tab. Tax groups are defined in VISUAL.

Commission % – Specify the commission percentage for this line item, if applicable. The default for the commission percentage is the value in the Commission % field on the Service tab of the Service Order.

Bill? – Select the check box if you want to include this expense line item in the invoice for billing.

Service Date – Specify the service date for this line item.

The service date is automatically entered from the Operation tab, however you can change the date by clicking in the field, then clicking the **Service Date** button and selecting a date.

Category – Click the drop-down list to select a category for the expense item.

Vendor ID – Click the **Vendor ID** button to select the vendor you want to reimburse for the expense in the selected line item.

Vendor Name – You cannot edit this field. The name of the vendor associated with the purchase order. The vendor name is automatically entered when you select a Vendor ID.

Pay? – Select this check box to pay the invoice for the line item when it is due (pay on or after date).

Voucher ID – You cannot edit this field. This is the Voucher ID of the A/P invoice entry.

Act Qty – Specify the actual number of items for an expense.

Act Curr Amount – You cannot edit this field. The estimated price of the expense is automatically populated based on the Act Qty, Unit Cost, Markup %, Markup $, and Discount %.

Act Amount – You cannot edit this field. The estimated price of the expense is automatically populated based on the Act Qty, Unit Cost, Markup %, Markup $, and Discount %.

Expense G/L – Click the **Expense G/L** button to apply transactions for this line item to a G/L account. The Expense G/L browse is filtered to the site selected in the service order.

This field is automatically populated when a G/L account is entered in the Account window on the Accounting tab.

Revenue G/L – Click the **Revenue G/L** button to select a receivable G/L account to override the default G/L account specified on the service order's Accounting tab. The Revenue G/L browse is filtered by the selected site on the service order if you set up account browses by site in VISUAL.

Buy Rate – You cannot edit this field.

Sell Rate – You cannot edit this field.

VAT Code – If your database is VAT enabled, click the VAT Code browse button and select the VAT code to use for this line item.

Site ID – You cannot edit this field. This field contains the Site ID selected on the General tab.

Specifications for Expense Line *<line #>* – Specify any specifications or instructions for this expense line item.

The information you specify in this text box is displayed on the invoice in the Comments for Expense.

3 Click the **Actual/Estimate** button view actual or estimated labor, material and expense totals.

4 To create additional expenses, click the **Insert** button to the left of the row to add another line item.

5 Click the **Save** toolbar button to save your changes.

Entering Information in the Labor Tab

Use the Labor tab to specify labor performed by service technicians on specific operations in the selected service order. Each line item in the grid becomes a labor ticket assigned to the specified resource/employee. Line items in the Labor tab cannot be deleted in CRM, however you can zero out the line item amount if necessary.

1 Click the **Labor** tab.

2 Click the appropriate field under the **Seq #** column.

3 To add labor to a specific operation, click the **Seq #**button to choose from a list of operations entered in the operation tab. The Seq # is required.

When an operation is selected, the Seq. Description field is automatically populated with the operation description.

4 Enter the following information in the Labor tab where applicable.

When adding line items, click the appropriate field or press the **Tab** key on your keyboard to specify information.

Ln – You cannot edit this cell. The number of lines in the Operation tab are automatically assigned in sequential order.

Clock In – Specify the time (in 00:00 AM/PM format), the employee began working on the operation.

Clock Out – Specify the time (in 00:00 AM/PM format), the employee completed work on the operation.

Hours – Specify the total labor hours for the operation. If you specify a clock in and clock out time, the elapsed hours are automatically calculated.

Resource ID – Click the **Resource ID** button to specify a Resource ID. The system displays only those resources not marked obsolete in Shop Resource Maintenance in VISUAL. This cell is automatically populated when an operation is selected.

Enter Resource IDs in VISUAL.

Employee ID – The Employee ID is automatically populated when you select an operation sequence. To edit the Employee ID, click the **Employee ID** button to choose from a list of Employees.

Note: Changing the Employee ID in the Labor tab will not automatically change the Employee ID on the Operation tab.

Service Date – Specify the service date for this line item.

The service date is automatically entered from the Operation tab, however you can change the date by clicking in the field, then clicking the **Service Date** button and selecting a date.

Transaction ID – You cannot edit this field. The Transaction ID of the labor ticket is automatically entered.

Site ID – You cannot edit this field. This field contains the Site ID selected on the General tab.

Specifications for Labor Line *<line #>* – Specify any specifications or instructions for this labor line item.

The information you specify in this text box is printed on the invoice within the Comments for labor.

5 Click the **Actual/Estimate** button view actual or estimated labor, material, and expense totals.

6 To add additional line items, click the **Insert** button to the left of the line item to insert another row.

7 Click the **Save** toolbar button.

8 To exit the Line Items for Service Order pane, click the **Close** button in the top right corner of the window.

9 To generate invoices for service orders you created, refer to “Items Eligible for Invoicing,” on page 10–49.

Deleting Line Items on a Service Order

Service Order line items cannot be deleted in CRM. You can zero out the line item amount, or change the Service Order’s status to “canceled” if necessary.

Editing Service Orders

1 With the appropriate service order selected in the Service Orders grid, click the **Toggle** button at the upper left side of the grid. You can also double-click the selected service order (avoiding the links).

2 Refer to the field definitions and instructions in “Adding Service Orders” to edit the selected record.

3 Click the **Save** toolbar button after you are finished editing.

4 To return to the Service Orders grid, click the **Toggle** button, or click the appropriate button on the navigation bar.

Deleting/Undeleting Service Orders

1 With the appropriate service order selected in the Service Orders grid, click the **Delete** toolbar button, or select **Edit, Delete Record(s)** from the main menu.

   You can also right-click the service order and select **Delete Record(s)** from the menu.

   If you set up CRM to prompt you when deleting records, click **Yes** to delete the call, or **No** to cancel the deletion in the Record Deletion dialog.

2 Click **Yes** to delete the service order, or **No** to cancel the deletion.

3 With the deleted record selected, you can undelete the record by clicking the **Delete** toolbar button again (as long as you have not saved the record), or select **Edit, Undelete Record(s)** from the main menu.

4 To permanently save your changes, click the **Save** toolbar button, or click the **Yes** button when exiting the grid.

Flagging Service Orders

You are reminded to follow-up on a service order at a specified date when you flag a service order by a red flag being placed beside flagged service orders in all the Service Orders.

1 With the appropriate service order selected, click the **Flag** toolbar button, or right-click the service order and select **Flag for Follow-up** from the menu.

2 Click the down arrow beside the Flag To field to choose the type of follow-up for this service order. Select from **Follow-up**, **Call**, **Arrange Meeting**, **E-mail**, or **Send Letter**.

3 Click the down arrow beside the Due By field to choose a date by which the follow-up must occur, or specify the date in Windows format.

If you do not want to specify a date, select **None**. To specify the current system date, click the **Today** button.

4 Select the **Completed** check box when the follow-up is complete. Flags in the Service Orders window appear red when open, and gray when closed.

5 To take a follow-up flag off a service order, click the **Clear Flag** button.

6 After all information is entered, click **OK** to save changes, or **Cancel** to return to the previous grid without saving changes.

Accessing My Follow-up Items

My Follow-up items include all service orders in the Service Orders grid that have been flagged for follow-up.

Expand the Field Service module in the navigation bar by clicking on the **+** button beside Field Service, then click the **+** button beside the Service Orders feature.

Click the **My Follow-up Items** button.

To view or edit service order details, refer to "Adding Service Orders" on page 10–28.

To make changes to your follow-up flag, refer to "Flagging Service Orders" on page 10–47.

Accessing Released Service Orders

The Released Service Orders button lists all service orders that have been released.

Expand the Field Service module in the navigation bar by clicking the **+** button beside Field Service, then click the **+** button beside the Service Orders feature.

Click the **Released Service Orders** button.

To add or edit a service order, refer to "Adding Service Orders" on page 10–28.

Accessing Closed Service Orders

The Closed Service Orders button lists all service orders that have been closed.

Expand the Field Service module in the navigation bar by clicking the **+** button beside Field Service, then click the **+** button beside the Service Orders feature.

Click the **Closed Service Orders** button.

To add or edit a service order, refer to "Adding Service Orders" on page 10–28.

Generating Invoices

To generate invoices for eligible service orders, access the Invoice feature from the CRM navigation bar. The Invoice feature creates a batch for all service items that match the criteria you enter, and creates accounts receivable invoices for the batch. The actual accounts receivable functionality occurs in VISUAL, so each CRM invoice has a corresponding VISUAL receivable.

Service Orders that contain line item charges that are covered under contract will not be charged on the invoice (those charges that are covered will convert to zero). Line items that are covered under contract show the charges in CRM so you can keep a record of total charges, parts purchased, and services performed. AP vouchers are created for all expense items associated with the service order.

Service items are eligible for invoicing when their status is “Closed” and they contain billable line items.

See “Items Eligible for Invoicing” on page 10-49.

Printing and Exporting Service Orders

Several options to print and export Service Order information are provided in CRM. Refer to the following chapters for additional information:

- To print a report on all Service Order records in the Service Orders grid, refer to “Printing All Records in a Grid,” on page 4–22.
- To print a report on a specific Service Order record, refer to “Printing a Specific Record,” on page 4–22.
- To print preloaded and user-defined reports, refer to “Using the Reports Menu Option,” on page 4–24.
- To export the Service Orders grid or a specific record within the Service Orders grid and save it in a specified format, refer to “Exporting Grid Contents,” on page 3–25.

Using the Invoice Feature

You can generate an invoice for service items, calls, and contracts using the Invoice feature. The Invoice feature creates a batch for all items that match the criteria you enter, and creates accounts receivable invoices for the batch. The actual accounts receivable functionality occurs in VISUAL, so each CRM invoice has a corresponding VISUAL receivable.

Service Orders that contain line item charges that are covered under contract will not be charged on the invoice (those charges that are covered will convert to zero). Line items that are covered under contract show the charges in CRM so you can keep a record of total charges, parts purchased, and services performed. AP vouchers are created for all expense items associated with the service order.

Service items are eligible for invoicing when their status is “Closed” and they contain billable line items.

Accessing the Invoice Feature

Expand the Field Service module by clicking the **+** button in the navigation bar, or double-click the module, if necessary.

To view the Invoices dialog, click the **Invoice** button.

The Invoice Service Items dialog allows you to select the criteria necessary for viewing and printing select invoices. You can choose an invoice through date, and the site and account associated with the invoices you want to view and print.

Items Eligible for Invoicing

The following conditions must be met before Service Orders, Calls, and Contracts are eligible to be invoiced.

Service Orders are eligible for invoicing when all of the following conditions are true:

- The service order status is closed.
- The service order contains billable line items.

Service Orders that contain line item charges that are covered under contract will not be charged on the invoice (those charges that are covered will convert to zero). Line items that are covered under contract show the charges in CRM so you can keep a record of total charges, parts purchased, and services performed. AP vouchers are created for all expense items associated with the service order.

Calls are eligible for invoicing when all of the following conditions are true:

- The call resolution event date is the same or earlier than the Invoice through date. If the Invoice through field is blank, then the call resolution event date must be the same or earlier than the current date.
- The Billable Hours check box is selected when stopping time recording for a call.
- A Call Billing ID has been assigned to the call.

- The call status is open.

Contract billing events are eligible for invoicing when all of the following conditions are true:

- The billing event date is the same or earlier than the Invoice through date. If the Invoice through field is blank, then the billing event date must be the same or earlier than the current date.
- The contract status is open.

Generating Invoices

You can generate invoices for select service orders, calls, and contracts using the Invoice feature.

1 From the Invoice Service Items dialog, click the **Invoice Through** drop-down calendar to select a through date. Items that are eligible to be invoiced on or before the date are selected in this field for invoicing.

2 In the **Invoice** section, select the items you would like to invoice. Choose one or more of **Service Orders**, **Calls**, and **Contracts**.

3 In the **Filter by (Optional)** section, specify this *optional* information:

Site ID – To generate invoices within a specific site, click the **Site ID** button to select a Site ID.

To generate invoices from all sites, leave this field blank.

Account – If you want to generate invoices for a specific account, click **Account** to select an account that has items eligible for invoicing.

To print invoices for all accounts, leave this field blank.

4 Click the **Invoice Report** button to select a report template from the list.

You can select the CRM default template titled invoice.rpt, or you can use Crystal Decisions Crystal Reports to customize the invoice.rpt report or create a custom report.

5 In the Description field, type a description of the invoice report.

6 To print a sample report, click **Print Sample**.

When you click the Print Sample button, invoices are not yet generated. An on-screen view of the invoice is opened. You have the option to generate and print the invoice from this window.

7 To generate invoices without printing a sample report first, click **OK**.

Invoices are generated for all eligible items you selected. A/R invoices are created in VISUAL Financials using corresponding invoice IDs.

Note: Invoiced Service Orders, Calls, and Contracts cannot be edited or deleted.

8 Click **Cancel** to exit the Invoice Service Items window without invoicing service items.

Using the Scheduler Feature

Use the Scheduler feature to view and maintain shop schedules in the VISUAL Scheduling window.

The Scheduling window allows you to view the shop schedule relative to firmed and released work orders. You have the ability to view multiple resources and schedules at the same time.

Refer to your *Infor VISUAL User's Guide* for more information on maintaining schedules in the Scheduling window.

Accessing the Scheduling Window

Expand the Field Service module in the navigation bar by clicking on the **+** button beside Field Service.

Click the **Scheduler** button.

You can maintain your shop schedule from the Scheduling window. Refer to your *Infor VISUAL Manufacturing User's Guide* for more information.

Using the Purchase Orders Feature

When you access Purchase Orders from the navigation bar in CRM, the VISUAL Purchase Order Entry window opens.

Use the Purchase Orders feature to create and maintain purchase orders for both inventory and non-inventory parts, as well as for subcontracted services. You can specify all the information necessary to complete and print purchase orders using the Purchase Order Entry window.

Refer to your *Infor VISUAL Purchasing User's Guide* for information on maintaining purchase orders in the Purchase Order Entry window.

Accessing the Purchase Order Entry Window

1. Expand the Field Service module in the navigation bar by clicking the **+** button beside Field Service.
2. Click the **Purchase Orders** button to open the Purchase Order Entry window.

   You can create and maintain purchase orders from the Purchase Order Entry window. Refer to your *Infor VISUAL Purchasing User's Guide* for more information.
3. Click the **Close** button, or select **File**, **Exit** from the main menu.

Chapter 11: Marketing

This chapter includes:

Topic

About Marketing

The Marketing module contains the Catalog feature. This feature allows you to create a library of company literature. You can catalog both electronic and printed literature, and organize and classify catalog items according to user-definable categories and types.

Using the Catalog Feature

The Catalog feature allows you to create a library of company literature. You can catalog both electronic and printed literature, and organize and classify catalog items according to user-definable categories and types.

Use the Catalog feature to create tasks for employees to mail printed material to specified contacts or accounts, or email electronic documents to contacts. Each document you send is recorded in several places to help you track the customers who received literature. Refer to the following below for a complete description.

When a printed document is sent to an account or contact:

- A Task is created for the employee that you assigned in the Tasks grid.
- A record of the task is displayed for each contact in the Documents option from the Accounts grid. If you send the document to an account, a record of each contact associated with the account is displayed in the documents option from the Accounts grid.
- A record of the task is displayed in the Documents option of the Contacts grid.

When an electronic document is sent to contacts:

- A record of the electronic document is displayed in the Documents option of the Accounts grid.
- A record of the electronic document is displayed in the History option of the Accounts grid.
- A record of the electronic document is displayed in the History option of the Contacts grid.
- A record of the electronic document is displayed in the Documents option of the Contacts grid.

To view a recorded document in documents option, refer to “Sending a Document,” on page 4–10.

Accessing the Catalog Grid

Note: Before you can begin working in the Catalog feature, you must specify a path file for CRM document logs in ***Admin > Defaults*** in the Marketing Documents field.

Expand the Marketing module in the navigation bar by clicking on the **+** button beside Marketing.

Click the **Catalog** button.

The Catalog Items grid contains general information about each catalog item. You can change the way you view information on this grid by using the filter options or customizing columns. See “Using CRM Grids” on page 3-21..

To add a catalog, refer to “Adding a Catalog Item”. To edit a catalog, refer to “Editing a Catalog”. To delete or undelete a catalog, refer to “Deleting/Undeleting a Catalog”.

To send a printed or electronic document to an account or contact, refer to “Printing and Exporting Catalog Information”.

To email a contact a document not included in the catalog, refer to “Sending a Document”.

Adding a Catalog Item

1. From the Catalog Items grid, select the **New** toolbar button, or right-click within the Catalog grid and select **New Record** from the menu.
2. Enter the following information in the New Catalog Item window when applicable.

   Doc ID – You cannot edit this field. A system assigned number is created that uniquely identifies the catalog item.

   Browse for a File to Add – If you are adding an electronic document, you must specify what document you want to send. If you are creating a printed catalog item, skip this field and continue with step 3.

   Click the **Browse for a File to Add** button to select the document you want to include.

   When you select a path name for the electronic document, "Electronic Document" is placed in the general tab so the user can easily identify the selected item is an electronic document.
3. Enter the following information in the **General** tab.

   Description – Specify a brief description of the material you are adding to the catalog.

   Category – Click the drop-down list to select a category from the list. This field categorizes your catalog items. Use this field to sort and filter the catalog items to reduce system load time and minimize the list so you can find items quickly.

   Define Categories in **Tools > Maintain > Document Types** on the main menu.

   Type – Click the drop-down list to select a type from the list. Types further categorize the catalog items.

   Define Types in **Tools > Maintain > Document Types** on the main menu.

   Creator – You cannot edit this field. The user name creating the catalog item is automatically populated in this field.

   Comments – Specify any comments relevant to the catalog item in the text box.
4. Click the **Save** toolbar button to save your additions.
5. Click the **Toggle** button to return to the Catalog Items grid.

Editing a Catalog

1. Select the catalog item from the Catalog Items grid, then click the **Toggle** button.
2. Edit the necessary information using the field definitions and instructions in "Adding a Catalog".
3. Click the **Save** toolbar button to save your changes.
4. Click the **Toggle** button to return to the Catalog Items grid.

Deleting/Undeleting a Catalog

1 Select the catalog item you want to delete from the Catalog Items grid.

2 Click the **Delete** toolbar button, or select **Edit**, **Delete** from the main menu.

You can also right-click the catalog item and select **Delete Record(s)** from the menu.

If you set up CRM to prompt you when deleting records, click **Yes** to delete the call, or **No** to cancel the deletion in the Record Deletion dialog.

3 Click **Yes** to delete the item(s), or **No** to cancel the deletion.

4 With the deleted record selected, you can undelete the record (as long as the record has not been saved) by clicking on the **Delete** toolbar button again, or select **Edit**, **Undelete Record(s)** from the main menu.

5 To permanently save your changes, click the **Save** toolbar button, or click **Yes** when exiting the grid.

Printing and Exporting Catalog Information

Several options to print and export Catalog information are provided in CRM. Refer to the following chapters for additional information:

- To print a report on all Catalog records in the Catalog Items grid, see “Printing All Records in a Grid” on page 4–22.
- To print a report on a specific Catalog record, see “Printing a Specific Record” on page 4–22.
- To print preloaded and user-defined reports, see “Using the Reports Menu Option” on page 4–24.
- To export the Catalog Items grid or a specific record within the Catalog Items grid and save it in a specified format, see “Exporting Grid Contents”.

Using the Events Feature

The Events feature allows you to create and track company events such as trade shows, campaigns or projects within CRM. You can assign attendees to events for registration tracking as well. Within each event, you can assign dates, specify the status of the event, assign the event to a user, and specify website information and comments as well as any user-defined information. The Attendees component allows you to specify information such as the customer attending the event, contact information, and user-defined stages.

Accessing the Events Grid

Expand the Marketing module by clicking the **+** button in the navigation bar, or double-click the module, if necessary.

To view the Events grid, click the **Events** button.

The Events grid lists basic information about each event. You can change the way you view information in this grid by using the filter options, or by customizing columns. See “Using CRM Grids” on page 3-21..

To view the event detail, refer to “Editing Events”. To create an event, refer to “Adding Events”.

The Option bar at the top of the Events grid allows you to create and maintain additional information associated with the selected event. The Events Option bar includes **History**, **Tasks**, **Appointments**, **Attendees, Accounts**, and any other options you choose from the Application Builder module. See “Using the Option Bar” on page 3-42..

Adding Events

Click the **New** toolbar button, or right-click in the Events grid and select **New Record** from the menu.

The Events tab contains general information about the event such as the dates of the event, the status, who the event is assigned to, and additional comments.

Refer to the following information in the header of the New Event detail window:

Event ID – An identification was automatically assigned to the event record so that the event and its associated information is distinguishable from other events in the Events grid. This is a read-only field.

Description – Specify a description of the event, such as Trade show or Campaign. This information automatically is displayed in the Events grid. You can customize the Events grid using the **Columns**, **Customize** menu.

Specifications – The **Specifications** button allows you to enter specifications for the selected event.

If the specifications icon in the New Event window is active, specifications exist for the selected event. If the **Specification** icon is inactive, no specifications exist for the selected event.

To add specifications, you must first save your new event by clicking the **Save** toolbar button, then click the **Specifications** toolbar button. See “Maintaining Specifications” on page 4-21..

Entering Information in the Event Tab

Refer to the following information in the Event tab to add an event.

Start Date – Click the **Start Date** drop-down calendar to select the date the event begins.

End Date – Click the **End Date** drop-down calendar to select the date the event ends.

Status – Click the Status drop-down list to select status of this event. Choose from the following options: **Not Started**, **In Progress**, **Completed**, **Waiting**, or **Deferred**.

Assigned To – You can assign a user to the event by clicking the **Assigned To** button. This may be the event coordinator or the main contact for event questions.

URL – If the event has a webpage or website, specify the web address in the URL (Uniform Resource Locator) field.

To access the webpage or website, click the **URL** button.

Comments – Specify any additional comments about the event in this text box.

Creator – This field is read-only. This field is automatically populated with the user name of the person who created this event.

Created – This field is read-only. This field is automatically populated with the date the event was created.

Last User – This field is read-only. This field is automatically populated with the user name of the user that last modified this event.

Last Modified – This field is read-only. This field is automatically populated with the date when the event was last modified.

Click the **Save** toolbar button, then continue with “Entering Information in the User Tab” to complete your new event.

Entering Information in the User Tab

This tab contains user-defined fields that allow you to add additional information to the event. Field labels are created in the **Admin > User Defined Fields** feature in the CRM navigation bar**.** You can add user-defined fields to the Events grid for viewing, and use sort and filter options to locate records easily. See “CRM Grids” on page 3-22..

Adding Attendees to an Event

You can add one or more attendees to an existing event using the Attendees feature. Attendees allow you to keep track of which customers are participating in the event. You can also track user-defined stage information, contract information and assign the attendee record to a CRM user.

You can add an attendee record from the Events grid, or from the Attendee grid.

Accessing Attendees

You can access the Attendees grid from the Events grid or from the Attendees grid. Refer to the following heading for more information.

Accessing Attendees from the Events Grid

From the Events grid, click the **Attendees** option button in the Option bar.

All the attendees associated with the selected event are listed. You can view, create and maintain attendees from this window.

Accessing the Attendees Grid

Expand the Marketing module by clicking the **+** button in the navigation bar, or double-click the module, if necessary.

To view the Attendees grid, click the **Attendees** button.

You can view, maintain and create attendees from the Attendees grid. To create attendees, refer to "Adding Attendees to an Event" for more information. In order to create an attendee record from the Attendee grid, you must assign the attendee to an existing event.

Adding Attendees

1 If you are creating attendees from the Event grid or detail window, click the **Attendees** option button, then click the Attendees For Event pane.

2 Click the **New** toolbar button, or right-click within the pane or grid and select **New Record** from the menu.

3 Refer to the following header information.

ID – An identification is automatically assigned for the attendee record so that this record and its associated information is distinguishable from other attendee records in CRM.

Event ID – Click the **Event ID** button to select the event you want to Partner with this attendee. Attendees must be attached to an event in order to save the attendee file in the database.

Refer to “Entering Information in the Event Tab” to continue adding your new attendee record.

Entering Information in the Event Tab

Click the **Event** tab.

The Event tab contains general information about the attendee as well as the user assigned to this record, comments, user-defined stages, and other information associated with the record.

Refer to the following fields to complete the Event tab.

Contact – If you want to specify a primary contact for the selected event in which this attendee is participating, click the **Contact** button.

If you are unsure of the contact name, you may want to specify the Account first, then select the Contact button so that the contacts in the list are those associated with the specified customer account.

To view detailed information about the contact, click the **View Detail** button.

Account – Click the **Account** button to select the customer account that is attending or participating in the attached event.

To view account details, click the **View Detail** button.

Stage – You can assign user-defined stages for participants in the Stage field. Click the **Stage** drop-down list to select the current stage for this attendee.

Define stages in General Code Maintenance. See “Maintaining General Maintenance” on page 2-5.

Stage Date – Click the **Stage Date** drop-down calendar to select the date and time that this attendee achieved the stage selected in the Stage field.

Assign To – You can assign this attendee record to a user by clicking the **Assign To** button.

Comments – Specify additional comments regarding this attendee in the Comments text box.

Creator – The user name of the creator is automatically supplied in the Creator field. This field is read-only.

Created – This field is automatically populated with the date and time this attendee record was created. This field is read-only.

Last User – This field is automatically populated with the user who last modified this attendee record. This field is read-only.

Last Modified – This field is automatically populated with the date and time this attendee record was last modified. This field is read-only.

Refer to “Entering Information in the User Tab” to complete adding a new attendee record.

Entering Information in the User Tab

This tab contains user-defined fields that allow you to add additional information to the attendee record. Field labels are created in the **Admin > User Defined Fields** feature in the navigation bar**.** You can add user-defined fields to the Attendees grid for viewing, and use sort and filter options to locate records easily. See “CRM Grids” on page 3-22..

Editing Attendees

1 With the appropriate attendee selected in the Attendee grid or Attendees for Event pane, click the **Toggle** button at the top left of the grid. You can also double-click the selected attendee.

2 Refer to the field definitions and instructions in “Adding Attendees to an Event” to edit the selected attendee.

3 Click the **Save** toolbar button after you are finished editing.

4 To return to the Attendees grid or Attendee for Event pane, click the **Toggle** button, or click the **Attendees** button on the navigation bar.

Deleting/Undeleting Attendees

1 With the appropriate attendee selected in the Attendees grid or the Attendee for Event pane, click the **Delete** toolbar button, or select **Edit, Delete Record(s)** from the main menu.

   You can also right-click the selected attendee and select **Delete Record(s)** from the main menu.

   If you set up CRM to prompt you when deleting records, click **Yes** to delete the call, or **No** to cancel the deletion in the Record Deletion dialog.

2 With the deleted record selected, you can undelete the record by clicking the **Delete** toolbar button again (as long as you have not saved the record), or select **Edit, Undelete Record(s)** from the main menu.

3 To permanently save your changes, click the **Save** toolbar button, or click **Yes** when exiting the grid or pane.

Editing Events

1 With the appropriate event selected in the Events grid, click the **Toggle** button at the top left of the grid. You can also double-click the selected event.

2 Refer to the field definitions and instructions in “Adding Events” to edit the selected event.

3 Click the **Save** toolbar button after you are finished editing.

4 To return to the Events grid, click the **Toggle** button, or click the **Events** button on the navigation bar.

Deleting/Undeleting Events

1 With the appropriate event selected in the Events grid, click the **Delete** toolbar button, or select **Edit**, **Delete Record(s)** from the main menu.

You can also right-click the selected event and select **Delete Record(s)** from the main menu.

If you set up CRM to prompt you when deleting records, click **Yes** to delete the call, or **No** to cancel the deletion in the Record Deletion dialog.

2 With the deleted record selected, you can undelete the record by clicking the **Delete** toolbar button again (as long as you have not saved the record), or select **Edit**, **Undelete Record(s)** from the main menu.

3 To permanently save your changes, click the **Save** toolbar button, or click **Yes** when exiting the grid.

Printing and Exporting Events and Attendees

Several options to print and export Event and/or Attendee information are provided in CRM. Refer to the following chapters for additional information:

- To print a report on all Event or Attendee records in the Events or Attendees grid, refer to “Printing All Records in a Grid”.
- To print a report on a specific Event or Attendee record, refer to “Printing a Specific Record”.
- To print preloaded and user-defined reports, refer to “Using the Reports Menu Option”.
- To export the Events or Attendees grid or a specific record within the Events or Attendees grid and save it in a specified format, refer to “Exporting Grid Contents”.

Chapter 12: Application Builder

This chapter includes:

Topic

About Application Builder

Use the Application Builder module to view features you created using the Application Builder feature. You can access your feature and create and edit customizable records using the App Builder module.

The detail window for each record you create in your custom feature of the Application Builder module contains two tabs that include user-defined information and associated CRM files. You can apply relationships between your application and other CRM records, allowing you to access your record from the option bars of associated records, or from application detail records, depending on the type of relationship you specified in the Application Builder feature.

Using the Application Builder Module

Note: There are two Application Builder menu options on the Navigation Bar (seen as App Builder). One Application Builder is a module, where the other is a feature (an option that is within a module, like Contacts within the Contact Center module). To create an application, refer to Chapter 13, "Using the Application Builder Feature".

Click the **+** sign beside the App Builder module, then click the App Builder feature you created.

Each feature you create opens a grid similar to the grids in all CRM features. You can create, edit, delete, and Partner your records from this feature. Refer to the appropriate heading for procedures and information.

Adding a Record

1 To create a new record, click the **New** toolbar button, or right-click your mouse within the grid and select **New Record** from the menu.

   Every feature you create in the Application Builder feature looks similar to the window above (other than the fields). An ID, Description field, and two tabs are created: **General** and **Details**.

2 Refer to the following fields to specify your record.

   ID – This field is automatically populated with a unique identification number that identifies the record. You cannot edit this field.

   Description – Specify a description of the record in the Description field.

3 Enter information in the user-defined fields you have defined using the User Defined Fields feature in the Admin Module.

   User defined fields can be added to your grid by customizing columns. See "Customizing Columns" on page 3-31.

4 Click the **Save** toolbar button.

5 Click the **Details** tab.

6 Click the **Account** button beside the Account field to specify an account.

   If you specify an account in the Account field, you can view account details by clicking the **View Detail** button.

7 Enter additional comments in the Comments field.

8 Click the **Save** toolbar button.

Editing a Record

1 Select the record you want to edit in the grid.

2 Click the **Toggle** toolbar button.

3 Edit the necessary information in the Record detail window.

Refer to "Adding a Record" for field definitions and procedures.

4 Click the **Save** toolbar button.

5 Click the **Toggle** toolbar button to return to the grid.

Deleting a Record

1 With the appropriate record selected in the grid, click the **Delete** toolbar button, or select **Edit, Delete Record(s)** from the main menu.

Note: You can also right-click the contact and select **Delete Record(s)** from the menu.

If you set up CRM to prompt you when deleting records, click **Yes** to delete the call, or **No** to cancel the deletion in the Record Deletion dialog.

2 With the deleted record selected, you can undelete the record (as long as the record has not been saved) by clicking on the **Delete** toolbar button again, or select **Edit, Undelete Record[s]** from the main menu.

3 To permanently save your changes, click the **Save** toolbar button, or click **Yes** when exiting the grid.

Chapter 13: Admin

This chapter includes:

Topic

About Admin

The Admin module on the navigation bar includes seven features that allow you to create and maintain employees, reports, and user defined fields, assign users and set security, import text files and records from VISUAL, and maintain defaults in CRM.

Using the Defaults Feature

The Defaults feature automatically populates specified fields within CRM features allowing you to create records in less time while minimizing errors, and assign specific settings such as prompt for Customer IDs, restricting sales rep selections, assigning ownership by sales rep, assign window settings, define a marketing document path, specify a maximum retrieval limit, and a maximum file size for email.

The **Defaults** button on the navigation bar allows you to create and maintain CRM defaults for CRM Today, Accounts, Contacts, Opportunities, Quotes, Calls, Contracts, Service Orders, Employees, Documents, user-defined part fields, Back Office, as well as defining and maintaining system settings.

Accessing the Defaults Window

Expand the Admin module in the navigation bar by clicking on the **+** button, then click the **Defaults** button.

The Set Defaults window tabs contain CRM system defaults. The tabs include: **System**, **Account**, **Contact, Opty**, **Quote**, **Help Desk**, **Contract**, **Srvc Order**, **Employee**, **Document, Part**, and **Back Office**.

Maintaining Defaults

Maintain defaults for your system, accounts, contacts, opportunities, quotes, calls and issues, contracts, service orders, employees, documents, parts, and back office.

Entering Information in the System Tab

Enter a URL for your CRM Today page, and assign certain functions and defaults that apply to the CRM system.

1 Click the **System** tab to view the system default information.

2 Refer to the following when adding or editing system defaults.

   URL for CRM Today – This default represents the URL address that displays when you open the **CRM Today** feature. Specify the URL address of the preferred website.

   You may want to set this URL to your company homepage, or a corporate or departmental intranet page. You must specify the URL value manually. You do not need to include the standard prefix of http://.

   Use Default – Click the **Use Default** button to return to the default URL address for the **CRM Today** button. The **Use Default** button resets any URL you may have entered to the system default page defined in your database.

Note: The new URL settings do not take effect until you refresh the page.

Record Retrieval Limit – Specify the maximum number of records a user can call in a single search before CRM warns the user that he has exceeded the query limit.

In the dialog, click the **Filter** button to filter your query. Click **Continue** to continue the query, or **Cancel** to cancel the query.

If you do not want to set a limit, specify 0. This setting maximizes system load time by minimizing the number of records retrieved when you open a grid.

Allow Override - If the record retrieval limit has been reached and this check box is selected, the user is allowed to override the record retrieval limit by: adding a filter to the to reduce the record retrieval amount, continue displaying all records, or cancel the record retrieval request.

Reminder Interval – Specify the time in minutes that you want reminders checked in CRM.

For example, if you entered five minutes in this field, there is a check every five minutes for reminders that are due. If you create a reminder that is scheduled to open at 10:03am, and reminders were last checked at 10:00am, then there will not be a check for reminders until 10:05am. At 10:05am, the reminder you created is opened.

3 Enter the following settings in the Options section.

Enable Back/Forward Buttons – Select this check box to enable the **Back** and **Forward** buttons on the URL toolbar. Leave this check box unchecked if you want to disable these buttons.

Restrict Sales Rep selection by Account - Select this check box to limit the Sales Rep to the assigned Sales Rep or alternate Sales Rep of the associated account.

SOA Enabled - Allow for VISUAL customer id preferences – This check box is displayed only if your CRM database has been used to send BODs. If you use your database to send BODs, it is important that the account IDs created in CRM match their associated customer IDs in VISUAL, Otherwise, multiple BODs are sent for the same account/customer, which results in duplicate records.

When CRM detects that your database has sent BODs, account IDs and customer IDs are forced to be identical. While it is not recommended, you can override this requirement. For example, if you do not plan to send BODs in the future, you can remove the requirement that account IDs and customer IDs must be identical.

To select the customer ID to use when your database has sent BODs, select the S**OA Enabled - Allow for VISUAL customer id preferences** check box. A message is displayed that states that selecting this check box is not advised. Click **Ok**. After you select the check box, the Prompt for ID when creating new VISUAL customer and Use Next Number Gen when creating new VISUAL customer check boxes are available.

Prompt for ID when creating new VISUAL customer – This check box is displayed if your CRM database does not send BODs or if you selected the **Enabled - Allow for VISUAL customer id preferences** check box. To specify the customer ID to use when you convert an account to a customer, select this check box. When you convert an account to a customer, a dialog is displayed. By default, the CRM account ID is inserted. You can specify a different customer ID. If you do not want to manually specify a customer ID, clear this check box.

Use Next Number Gen when creating new VISUAL customer – This check box is displayed if your CRM database does not send BODs or if you selected the **Enabled - Allow for VISUAL customer id preferences** check box. To use the next number generation scheme specified in

Customer Maintenance to create the customer ID, select this check box. If you select this check box and the Prompt for ID when creating new VISUAL customer check box, then the next ID based on the numbering scheme is displayed. If you do not want to use the number generation scheme specified in Customer Maintenance, clear this check box.

4 Click **OK** to save changes, or **Cancel** to exit the window without saving changes. If you want to save your changes without exiting the window, click **Apply**.

Entering Information in the Account Tab

The Account tab includes default settings for creating an account in CRM, and field labels for VISUAL customers in the Account tab.

If you select a default for the fields on the Account tab, the field in the Account window is automatically populated when you create a new account.

1 Click the **Account** tab.

2 Specify this information in the Account tab.

Account Type – Click the drop-down list to specify an account type in the Account Type field.

Define Account Types in the General Code Maintenance window by selecting **Tools > Maintain > General Codes** from the main menu. See “Maintaining General Maintenance” on page 2-5.

Division – Click the drop-down list to select a default for this field when adding records in the CRM system.

Define Divisions in **Tools > Maintain > General Codes** from the main menu.

Bus Unit – Click the drop-down list to select a default for this field when adding records in the CRM system.

Define Business Units in **Tools > Maintain > General Codes** in the main menu.

Branch – Click the drop-down list to select a default for this field when adding records in the CRM system.

Define Branches in **Tools > Maintain > General Codes** in the main menu.

Recv GL Account ID – Click the **Recv GL Account ID** button to select a Receivables General Ledger Account ID as a default when entering a new account.

Def Sales Tax ID – Select a Default Sales Tax Group ID.

Terms – Click the **Terms** button to select a default Terms ID for all records that offer terms, such as Accounts. Create terms in the Terms Maintenance dialog in VISUAL’s Application Global Maintenance. If you use VISUAL Financials Global Edition for .NET, create terms in VISUAL Financials Global Edition Terms Rule Maintenance.

Tax Exempt – Select the check box if the company is exempt from taxes.

RMA Required – Select the check box if you require the customer to have a Return Material Authorization (RMA) before returning materials.

Print Dunning Letters – Select the check box if the letter demanding payment is to be printed after the expiration of the receiving age limit.

Is Lead – Select the check box if you want new accounts to be designated as leads by default. A lead is an account that is not associated with a VISUAL customer.

Accepts Partial Shipments – Select the check box to default that new account holders allow partial shipments.

Accepts early orders ___ days early – Select the check box if this customer accepts early orders. Specify the maximum number of days the company allows for early orders.

Discount Code – Click the Discount Code drop-down arrow and select the default discount code.

Credit Limit – Specify the maximum amount of credit that you want to apply to the account. If this limit is exceeded, no orders can be placed for the account. To allow unlimited credit, specify a value of $0.

The Credit Limit field can be found in the Accounting tab of the Accounts detail window.

Recv Age Limit – The number of days (from the invoice date of an unpaid invoice) which you will no longer take orders without a payment from the customer. For a limitless receivable age, specify a value of $0.

The Recv Age Limit field can be found in the Accounting tab of the Accounts detail window.

Credit Status – Click the drop-down list to specify a credit status for accounts. Choose from the following defaults:

- **OK** – Automatically accepts and processes all orders for the new account.
- **On Hold** – Holds all orders and shipments for the new account.
- **Orders on Hold** – Holds all orders for the new account. You can process shipments.
- **Shipments on Hold** – Holds all shipments for the new account. You can process orders.

Credit Limit Ctrl – Click the drop-down list to select a credit limit from the list. Choose from **Override Allowed**, or **No Override**.

This field allows you to specify if the customer can place an order once they have exceeded their credit limit. If you assign **Override Allowed**, you can place the customer order. If you assign **No Override**, you cannot place the customer order.

Carrier ID – Click the drop-down arrow and select the preferred carrier for this customer.

Ship Via – Click the drop-down list to specify the shipping method for all new quotes. Define Shipment codes in VISUAL.

FOB – Click the drop-down list to specify a Free On Board code for all new quotes. Define FOB codes in VISUAL.

Territory – Click the drop-down list to select a default for this field when adding records in the CRM system. Define Territories in VISUAL.

Allow fields from V_ACCT_ENTITY table to grid - Select the check box to allow fields from the V_ACCT_ENTITY table to display in the Accounts grid. If you use multiple entities, each account-entity pairing is displayed in the Accounts grid. If you change your check box preference, select **Tools** > **Rewrite Default Grid Layouts** to refresh your account grid layout. To display entity information in your Accounts grid refer to "Customizing Columns" on page 3–31.

Note: If you clear this check box and advanced filters for this table exist, an error occurs.

Allow fields from V_ACCT_SITE table to grid - Select the check box to allow fields from the V_ACCT_SITE table to display in the Accounts grid. If you use multiple sites, each account-site pairing is displayed in the Accounts grid. If you change your check box preference, select **Tools** > **Rewrite Default Grid Layouts** to refresh your account grid layout. To display site information in your Accounts grid refer to "Customizing Columns" on page 3–31.

Note: If you clear this check box and advanced filters for this table exist, an error occurs.

3 Click **OK** to save changes.

Click **Cancel** to exit the window without saving changes.

Click **Apply** to save your changes without exiting the window.

Entering Information in the Contact Tab

The Contact tab allows you to choose if you want to populate a new contact's address with the account's address.

1 Click the **Contact** tab.

2 In the **New Contact** section, select one of the following:

Always – When creating a new contact for an account, the account address and account phone number is always entered into the contact.

Never – When creating a new contact for an account, the account address and account phone number are never entered into the contact.

Prompt – When creating a new contact for an account, a prompt is displayed.

3 To update an account's business phone, fax, and web information when changes are made to that account's primary contact, select the check box. By default, this check box is not selected.

4 To make fields in the V_ACCOUNT table available in the Contacts grid, select the **Include all available account fields from the V_Account table** in the Contacts grid check box.

When you select this check box, you can customize the Contacts grid to include any field from the V_ACCOUNT table. To display account information in your Contacts grid refer to "Customizing Columns" on page 3–31. If you select this check box, the same contact can be displayed multiple times. If a contact is attached to more than one account, then one line for each contact-account pairing is displayed.

If you change your check box preference, select **Tools** > **Rewrite Default Grid Layouts** to refresh your contact grid layout.

5 Click **OK** to save changes.

Click **Cancel** to exit the window without saving changes

Click **Apply** if you want to save your changes without exiting the window.

Entering Information in the Opportunity Tab

The Opportunity tab includes defaults that automatically populate when adding new opportunities in CRM.

1 Click the **Opty** tab.

2 Enter the following information in the Opportunity tab.

Probability % – Specify the default probability of all new opportunities closing in this field.

Product – Click the drop-down list to specify a product code for all new opportunities. Product Codes specify which general ledger accounts to use for VISUAL parts.

Define Product Codes in VISUAL.

Opty Type – Click the drop-down list to specify an opportunity type for all new opportunities.

Define opportunity types in **Tools > Maintain > General Codes** from the main menu.

Lead Source – Click the drop-down list to specify a lead source for all new opportunities.

Define lead source types in **Tools > Maintain > General Codes** from the main menu.

Territory – Click the **Browse** button to specify a territory for all new opportunities.

Define territory types in **Tools > Maintain > General Codes** from the main menu.

Division – Click the drop-down list to select a default division for all new opportunities.

Define Divisions in **Tools > Maintain > General Codes** from the main menu.

Bus Unit – Click the drop-down list to select a default business unit for all new opportunities.

Define Business Units in **Tools > Maintain > General Codes** in the main menu.

Branch – Click the drop-down list to select a default branch for all new opportunities.

Define Branches in **Tools > Maintain > General Codes** in the main menu.

Forecast – Select the **Forecast** check box to include all new opportunities in forecasting. Forecasting information can be used to print customer reports.

3 Click **OK** to save changes and exit this dialog, or click **Apply** to save the changes without exiting the dialog. Click **Cancel** to exit this dialog without saving changes.

Entering Information in the Quote Tab

The Quote tab includes defaults that automatically populate when adding quotes to CRM.

1 Click the **Quote** tab.

2 Enter the following information in the Quote tab.

Expires In – Specify the number of days a new quote remains in the system before it is automatically deleted from the Quotes grid.

Type – Click the drop-down list to specify the type of quote for all new quotes.

Define quote types in **Tools > Maintain > General Codes** from the main menu.

Ship Via – Click the drop-down list to specify the shipping method for all new quotes.

Define Shipment codes in VISUAL.

FOB – Click the drop-down list to specify a Free On Board code for all new quotes.

Define FOB codes in VISUAL.

Discount Code – Click the down list to specify a discount code for all new quotes.

Define Discount Codes in VISUAL.

Commission % – Specify a default commission percentage to automatically populate the Commission % field for all new quotes.

Leadtime – This field populates with the quoted leadtime, as in the total number of days from the beginning of the quote that the order is expected to ship.

3 In the **Re-eval Part Unit Price** section, select an option to determine when part unit prices are re-evaluated on quotes. You can select **Always**, **Never**, or **Prompt**. When a part is on a quote, and you selected Prompt, a message will be displayed asking you to confirm the re-evaluation.

Part lookup by customer price table – Select this check box to lookup parts and price breaks according via the customer price table.

Always lock quote line sub-form (Check only if quote lines are entered via plug-in) – Select this check box to lock imported quotes.

4 In the **Order Status** section, select one of the following radio buttons:

Firmed – Select this option button if you want the default status of all new orders to be firm. A firmed order, until you change its status, exists for planning purposes only.

Released – Select this option button if you want the default status of all new orders to be released. Released orders are orders on which work may begin immediately.

On Hold – Select this option button if you want the default status of all new work orders to be on hold. Work cannot begin on orders with an on hold status until the status changes appropriately.

5 In the **Work Order Numbering** section, select one of the following radio buttons:

Use Order ID – Select this option if you want work order Base IDs assigned using the Customer Order ID. When work orders created for multiple line items are numbered using the Customer Order ID, each successive line item is given a new lot number. This allows the same Base ID to be used for all line items on the resulting order. For example, if there are two line items for customer order 2029, they will receive a Base ID/Lot ID of 2029/1 and 2029/2.

Use Next Work Order Base ID – Select this option if you want work order Base IDs assigned using the normal auto-numbering scheme for work orders.

6 In the Quote to Order box, specify this information:

Copy User Defined Data – If you want user defined data copied to quotes, select the Copy User Defined Data check box. By default, this check box is selected.

Combine Specifications and Comments – If you want specifications and comments combined on quotes, select the Combine Specifications and Comments check box. By default, this check box is cleared.

Subsequent quote status - Click this drop-down button to select the status of a quote after it has been converted to a customer order. Your choices are Inactive, Open, Won, Lost, and Closed. The system defaults to Closed.

7 Click **OK** to save your defaults and exit the dialog, or click **Apply** to save your defaults without exiting the dialog. Click **Cancel** to exit the dialog without saving changes.

Entering Information in the Help Desk Tab

The Help Desk tab includes default settings for new calls and resolutions. If you select a default in the fields on the Help Desk tab, the field in the Help Desk feature is automatically populated when you create a new call.

1 Click the **Help Desk** tab.

2 Enter the following information in the Help Desk tab.

Lookup Type – Click the drop-down list to select a default lookup type for the call. The Lookup Types drop-down list allows you to associated a CRM record with the issue of the call, providing easy access for related documents. Choose from the following options: **Contract**, **Contract Item**, **Part** or **Trace**.

Status – Click the drop-down list to select a default status for all new calls. Choose from the following options:

- **Open** – Call is immediately open for processing.
- **Hold** – Call is entered into the system but not ready for processing.
- **Closed** – Call is resolved and requires no further processing.
- **Canceled** – Call was entered into the system, but will not be processed.
- **Invoiced** – Call is closed and invoiced. Future functionality will automatically send all billing information from the Call record in CRM to VISUAL Financials Global Edition for processing.

Priority – Click the drop-down list to select a default priority from the list. Priorities are user-defined in **Tools > Maintain > General Codes** from the main menu. Priorities must be entered before they can be selected from the default list.

Resource – Click the **Resource** button to select a default Resource ID from the list. Default Resource IDs are found in the Calls Issues window. The system displays only those resources not marked obsolete in Shop Resource Maintenance in VISUAL.

Unified Interface – Select the Unified Interface check box if you want to begin working in the Help Desk module using the unified interface.

Caution: If you want to change the Help Desk interface, you should do this when you first install CRM. If you attempt to change the Help Desk interface after you have been working in the Help Desk component and have created one or more calls and issues, you could lose valuable Help Desk data.

The unified interface differs from the standard interface in that both the Calls and Issues features are combined into one record, allowing one issue per call. The standard interface contains both Calls and Issues features, allowing you to attach multiple issues per call. If you use a unified interface, for more information refer to Chapter 9, “Calls & Issues in a Unified Interface”. If you do not use a unified interface, for more information refer to Chapter 8, “Calls”.

Show All Unclosed Calls/Issues – Select this check box to show all calls and issues that do not have a status of Closed in the Open Calls, My Open Calls, Open Issues, and My Open Issues windows. Clear this check box to show only calls or issues that have a status of Open in the Open Calls, My Open Calls, Open Issues, and My Open Issues windows.

Require VMFG Customer – Reserved for future use.

Allow calls for delinquent accounts – Select this check box to allow calls to be entered for delinquent accounts, while setting the call status to “Hold.”

3 Enter the following information in the **Resolution Save** section.

Show Timer Dialog – Select this check box if you want the Stop Recording Time dialog to appear each time you specify a resolution and click the **Save** toolbar button.

Time is Billable – Select the check box to default to bill new calls on a per-call basis. This field is displayed in the Stop Recording Time window. Billable time is for reference only.

Billing ID – If you intend to bill for calls, click the drop-down button and select the Call Billing ID you would like to use as the default value. Set up Call Billing IDs in General Code Maintenance. For more information on General Code Maintenance, refer to “Maintaining General Maintenance,” on page 2–5.

Rev GL Acct ID – Click the browse button to select the Revenue account you would like to use when you process invoices for calls.

4 Enter the following information in the **Follow-up Defaults** section.

Auto Generate – Select the check box if you want follow up details automatically created for new calls.

Days after Close – Specify the default number of days after the close of the call that you want a follow-up call auto-generated.

Assigned To – Specify the user name or click the **Assigned To** button to choose a default CRM user assigned to the follow-up call.

5 Click **OK** to save changes, or **Cancel** to exit the window without saving changes. If you want to save your changes without exiting the window, click **Apply**.

Entering Information in the Contract Tab

The Contract tab includes default contract maintenance settings. If you select a default in the fields on the Contract tab, the field in the Contract feature is automatically populated when you create a new contract.

1 Click the **Contract** tab.

2 Specify this default information in the Contract tab.

   Status – Click the drop-down list to select a default status for new contracts. Select from **Pending**, **Active**, **Hold**, **Closed**, or **Canceled**.

   Contract Type – Click the drop-down list to select a contract type for all new contracts.

   You must create a contract type in the Contract Types feature before entering a default contract type in this field.

   Product Code – Click the **Product Code** button to specify a default Product Code for all new contracts. Product Codes specify which general ledger accounts to use for VISUAL parts.

   Define Product Codes in VISUAL.

3 In the **Contract Type** section, select one of the following:

   Always – When creating a new contract for an account, the default contract type is always entered.

   Never – When creating a new contract, the default contract type is never entered.

   Prompt – When creating a new contract, a message is displayed that allows you to choose whether you want to specify the default contract type.

4 In the **Revenue Accounts** section, specify this information:

   Material – Click this button to specify a default material code for all new contracts.

   Expense – Click this button to specify a default expense code for all new contracts.

   Labor – Click this button to specify a default labor code for all new contracts.

   Contract – Click this button to specify a default revenue account for invoices generated by contract billing events.

5 Click **OK** to save changes, or **Cancel** to exit the window without saving changes. To save your changes without exiting the window, click **Apply**.

Entering Information on the Srvc Order Tab

The Service Order tab includes default service order settings. If you select a default in the fields on the Service Order tab, the field is automatically populated in the Service Order feature when you create a new service order.

1 Click the **Srvc Order** tab.

2 Use this information when assigning defaults to the Service Order tab:

Status – Click the drop-down list to select a default status for new service orders. Choose from **Unreleased**, **Firmed**, **Released**, **Hold**, **Closed**, **Canceled**, or **Invoiced**.

The Status field is found in the Service Order window.

Priority ID – Click the drop-down list to select a default priority from the list. Create priorities in **Tools > Maintain > General Codes**.

The Priority field is found in the Service Order window on the General tab.

Service Type – Click the drop-down list to select a default service type from the list. This field indicates the type of service being performed through the course of the contract.

The Service Type field is found in the Service Order window on the General tab.

Define Service Types in **Tools > Maintain > General Codes** from the main menu.

Service Code – Click the drop-down list to select a default service code from the list.

The Service Code field is found in the Service Order window on the General tab.

Define Service Codes in **Tools > Maintain > General Codes** from the main menu.

Account Mgr – Click the **Account Mgr** button to select a default account manager responsible for new service orders. Create account managers in **Admin > Employees** on the navigation bar.

The Account Mgr field is found in the Service Order window on the Service tab.

Product Code – Click the drop-down list to select a default product code from the list. The product code is the code associated with the product of the work order. Product Codes specify which G/L accounts to use for VISUAL parts.

The Product Code field is found on the Accounting tab of Service Order details.

A Product Code must be associated with each CRM service order in order for VISUAL service work orders to process accurately. Define specific “service” product codes in VISUAL.

For service specific accounting, the service Product Code must have associated G/L cost accounts.

WO Prefix – Specify a default work order prefix to identify specific types of service orders.

Lookup – Click the drop-down list to select a default item (**Contract**, **Contract Item**, **Part ID**, or **Trace ID**) to assign to a service order.

Issue Material – Select this check box to automatically issue material from inventory.

Bill Line Items – Select this check box to automatically bill line items.

Print Zero Value Invoices – Select this check box to allow invoices with zero value to be printed.

Part lookup by Cust price table – Select this check box if you want parts looked up by the customer price table and reflective of price breaks.

Pass SO specs to receivable vs comments – Specify the information to pass to the invoice header after generating a receivable invoice from a service order. To use the service order specifications, select this check box. To use the service order comments, clear this check box.

3 In the Re-evaluate Part Unit Price section, select one of the following options:

Always – Select Always if you want part unit prices always re-evaluated for new service orders.

Never – Select Never if you never want part unit prices re-evaluated for new service orders.

Prompt – Select Prompt if you want a confirmation message displayed before part unit prices are re-evaluated for new service orders.

4 Enter the following information in the **Revenue Accounts** section.

Material – Click the **Material** button to select a G/L account for material expense on this service order. G/L accounts are defined in VISUAL.

Expense – Click the **Expense** button to select a G/L account for expense for this service order. G/L accounts are defined in VISUAL.

Labor – Click the **Labor** button to select a G/L account for labor expense on this service order. G/ L accounts are defined in VISUAL.

5 Enter the following information in the **Follow-up Defaults** section.

Auto Generate – Select the check box if you want follow up details automatically created for new service orders.

Days after Close – Specify the default number of days after the close of the service order that you want a follow-up call auto-generated.

Assigned To – Specify the user name or click the **Assigned To** button to choose a default CRM user assigned to the service order follow-up call.

6 Click **OK** to save changes, or **Cancel** to exit the window without saving changes. To save your changes without exiting the window, click **Apply**.

Entering Information in the Employee Tab

The Employee tab includes a default employee setting for the Resource ID field. If you select a default in this field on the Employee tab, this field is automatically populated in the Employee feature when you create a employee. There is also a preference setting to allow or disallow adding fields from the EMPLOYEE_SITE table to the Employees grid.

1 Click the **Employee** tab.

2 Specify this information in the Employee tab.

Resource – Click the **Resource** button to choose a default Resource ID from the list. Employees are categorized under Resource IDs or service categories to aid in assigning the correct employee for the service. The system displays only those resources not marked obsolete in Shop Resource Maintenance in VISUAL.

3 Select the **Allow fields from EMPLOYEE_SITE table to grid** check box to allow fields from the EMPLOYEE_SITE table to be displayed in the Employees grid. If you use multiple sites, each employee-site pairing is displayed in the Employees grid. If you change your check box preference, select **Tools** > **Rewrite Default Grid Layouts** to refresh your Employees grid layout. To display employee site information in your Employees grid refer to “Customizing Columns” on page 3–31. Given that your security settings, you can view or modify the employee base pay rate in the Employees grid.

4 Click **OK** to save changes, or click **Cancel** to exit the window without saving changes. To save your changes without exiting the window, click **Apply**.

Entering Information in the Document Tab

The Document tab includes default fields that automatically populate using the information entered in this tab when you create a new document.

1 Click the **Document** tab.

2 Enter the following information on the Document tab.

Attachments – The Attachments field allows you to specify where you want email attachments to be saved. Click the **Attachments** button beside the Attachments field to specify the location where you want to save attachments. If you choose to track email, History records for all email sent are created. If you send an email that contains an attachment, the History feature saves the attachment as well.

Marketing Documents – Click the **Marketing Documents** button to specify the document directory where catalog items that were emailed or created as tasks can be logged. This field is also used to save copied attachments on History notes so all users can view the information contained in attachments.

Synch Directory – This feature is no longer available.

Max File Size (MB) – Specify the maximum size a file can be stored in the Catalog Items grid. If you don’t want to limit a size, specify 0.

3 Enter the following default settings in the **For a Printed Document, Create a Task with** section. These settings apply when sending a printed document.

Assign To ID – Click the **Assign To ID** button to assign an employee to the printed document.

Subject – Specify a default subject for all new printed documents.

Days Until Due – Specify the default number of days until the new task for a printed document is due.

4 Click **OK** to save your additions and exit the dialog, or click **Apply** to save your additions without exiting the dialog. Click **Cancel** to exit the dialog without saving changes.

Entering Information in the Part Tab

The Part tab includes field labels for user defined part fields. View user-defined part fields for a specified part in the Part Details window when accessing part information for line items on Quotes, or Contracts, and in the detail of a part in the Parts grid, and in Calls.

The Part tab also includes a check box that, when selected and after refreshing the default grid layouts for parts, allows you to view part information by site. Viewing part information by site is useful for multi-site environments where parts assigned to more than one site are displayed in one row per site.

1 Click the **Part** tab.

2 Enter the user defined field labels for parts for each of the 10 fields. The field label entries you specify here remain the same for all parts you access in CRM. Field labels for parts are not shared with VISUAL, only the field entries.

Make sure your field label entries correspond to the field entries beside these labels.

Part entries are created in the Part Maintenance window of VISUAL.

3 Select the **Allow fields from PART_SITE table to grid** check box if you want to display parts by site.

When selected, multi-site environments display one row, per part, per site in the Parts grid. When cleared the parts are displayed at the entity level in the Parts grid, with one line per part based on the selected site.

4 Click **Apply** to save your changes and remain in the Establish Defaults for CRM window.

Click **OK** to save your changes and exit the window.

Click **Cancel** to exit the window without saving changes.

5 If you changed your preference in the **Allow fields from PART_SITE table to grid** check box, select **Tools** > **Rewrite Default Grid Layouts** to refresh your part grid layouts.

Entering Information in the Back Office Tab

Use the Back Office tab to set up labels for user-defined fields and specify auto-numbering settings.

Specifying User-defined Fields Information

1 Click the **Back Office** tab.

2 In the Back Office field labels section, click the drop-down button to select the window where you would like to edit field labels.

3 Enter field labels (1 through 10). Field labels indicate the type of entry necessary for the information you type in the associated field. You can specify field labels in CRM, but be sure to change these field labels to a description that makes sense with the entries (if any) that have been entered from VISUAL.

The data in the fields is integrated with VISUAL, but the field labels must be manually entered in both CRM and VISUAL.

4 If you change user defined field labels that have already been entered into a grid, you must reset the Layout.grd file. You can select Rewrite Default Grid from the Tools menu. Or, you can:

- Right click in the appropriate grid and select **Columns > Customize**.
- Remove the previous user defined labels, then click **Ok**.
- Right click in the grid again and select **Columns > Customize**.
- Add the new user defined fields, then click **Ok**.

Specifying Auto-numbering Settings

Use auto-numbering to automatically create an ID when a record is saved. To create an ID using auto-numbering, users must leave the ID field blank when they create records.

You can set up auto-numbering for these modules:

- Account
- Address
- Call
- History Entry
- Contract
- Contract Type
- Employee
- Event
- Attendee
- Opportunity
- Quote
- Service Order
- Task

To specify auto-numbering settings:

1 Click the **Back Office** tab.

2 Specify this information:

Module – Select the module for which you are setting up auto-numbering.

Next Sequential Number – Specify the number to use the next time a record in the module is saved.

Alphanumeric Prefix – Specify a prefix that is attached at the beginning of each sequential number.

Alphanumeric Suffix – Specify a suffix that is attached at the end of each sequential number.

Number of Digits – Specify the total number of digits in the numeric portion of the ID. If you select the Show Leading Zeroes check box, this number is used to determine the correct number of leading zeroes.

Show Leading Zeroes – To include leading zeroes in the ID, select this option. When you select this option, all IDs have the number of digits that is specified in the Number of Digits field.

3 Click **OK**.

Using the Employees Feature

The **Employees** feature allows you to maintain employee records in CRM and VISUAL. View and edit information such as department, shift, type of pay, billing rate, employee address, skills, and base pay rate.

To import VISUAL employees, refer to “Back Office Import,” on page 13–47.

Accessing the Employees Grids

Expand the Admin module by clicking the **+** button in the navigation bar, then click the **Employees** button.

The Employees grid lists basic information about each employee. You can change the way you view information in this grid by using the filter options, or customizing columns. See "CRM Grids" on page 3–22.

To create a new employee, refer to “Adding Employees”. To view or edit an employee, refer to “Editing Employee Information”.

If you use multiple sites and have selected the **Allow fields from EMPLOYEE_SITE table to grid** check box to display information from the EMPLOYEE_SITE table in the Employees grid, then multiple lines are displayed for each employee-site pairing. Opening any of the lines for the employee opens the same record.

Refer to the following tabs to add information to the new employee tabs.

Adding Employees

When you specify employees in CRM, they are also accessible in VISUAL. However, additional information is required in CRM in employee records that VISUAL does not use, so some information you specify such as Area, Sub-area, and Skills, are only accessible through CRM.

1 Click the **New** toolbar button, or right-click your mouse in the Employees grid and select **New Record** from the menu.

   The Employee window includes three tabs: **General**, **Address**, and **Skills**.

2 Enter the following information in the Employee window.

   Employee ID – Specify a user-defined Employee ID that uniquely identifies the employee. Specify up to 15 characters.

   First/Mi/Last – From left to right, specify the first name, middle initial, and the last name of the employee.

   Account Manager – Select the check box if the employee is an account manager.

   Active – Select the check box if the employee record is active.

You can sort the Employee grid using the **Active** check box to filter or sort only active or only inactive employees from the list. See "Using Filters in Grids" on page 3-25..

Entering Information in the General Tab

This tab includes general employee information such as department, Shift ID, area, and pay and billing rates.

1 If necessary, click the **General** tab to view the employee information.

2 Enter the following information in the General tab.

Department – Specify the department where the employee works.

Shift ID – Click the **Shift ID** browse button to select a Shift ID from the list. Shifts must be created in VISUAL before they can be selected from the list. This field is required.

Earning Code – Click the drop-down list to select an earning code from the list. Create earning codes in VISUAL. This field is required.

Area – Click the drop-down list to select an area from the list. Create areas in the CRM main menu under **Tools > Maintain > Service Areas**.

Sub-Area – Click the drop-down list to select a sub-area from the list. Create sub-areas in the CRM main menu under **Tools > Maintain > Service Areas**. If sub-areas were not created for the area you selected, this field is inactive.

3 Choose one of the following options from the **Type** section:

Hourly – Select this radio button if the employee is paid on an hourly basis.

Salary – Select this radio button if the employee is paid on a yearly basis.

4 The Pay Rate table shows the sites to which the employee is assigned. Depending on your security settings, you can also view or edit the employee's base pay rate and the site at which it applies. Review information in the Pay Rate table and specify changes if necessary. To add a site to the employee's record, specify this information in the last row of the table:

Emp ID - This field displays the Employee's ID.

Site ID - Click the Site ID browse button to select a Site ID from the list.

Default - Select 'Y' for yes if this is the default site for this employee. If it is not the default employee site select 'N' for no.

Base Pay - Specify the pay rate for the employee; an hourly rate for an hourly employee and a yearly rate for a salaried employee. You can view and modify this field, given the appropriate security settings. See "Entering Information in the Fields Tab" on page 13-25.

5 Click the **Save** toolbar button.

Entering Information in the Address Tab

The Address tab includes the address, email, and phone number of the selected employee.

1 Click the **Address** tab.

2 Enter the following information in the Address tab.

Street Address – Specify the street address of the selected employee in the fields provided.

City, State, Zip – From left to right, specify the city where the employee resides. Click the drop-down list to select the state where the employee resides, then specify the zip code where the employee resides.

Country – Specify the country where the employee resides.

E-mail – Specify the email address of the employee.

After an email address is entered, you can click the **E-mail** button to open an email addressed to the employee.

Phone – Specify the phone number of the employee.

3 Click the **Save** toolbar button.

Entering Information in the Skills Tab

The Skills tab lists the employee's skill set and establishes a rating and bill rate for each skill. A skill is defined as a Resource ID. The Resource ID is filtered by the employee's sites.

1 Click the **Skills** tab.

2 Enter the following information in the Skills tab.

Resource ID – Click the cell, then click the **Resource ID** button to the right of the field to select an additional Resource ID for the employee. The Resource ID browse displays resources that exist in the employee's sites. The browse also only displays resources not marked as obsolete.

If an employee and a resource exist in more than one site, then the resource is listed multiple times in the resource browse, once for each site. You may need to expand the resource browse to view which resource line is associated with a particular site.

Define Resource IDs in the Shop Resource Maintenance window of VISUAL.

Description – Specify a brief description of the skill in the field provided.

Rating – Specify a rating to indicate the employee's ability in the resource or skill.

Billing Rate – Specify the amount the employee should charge for the Resource ID.

Default – Select the resource and rating you want to use as a default when adding the selected employee to contracts and service orders.

Site ID – The Site ID field populates with the site assigned to the selected resource in VISUAL's Shop Resource Maintenance.

3 To create additional resources or skills for the selected employee, click the **Insert Row** button to the left of the row.

4 Click the **Save** toolbar button to save your additions.

5 Click the **Toggle** button in the upper left corner to exit the New Employee window and return to the Employees grid.

Editing Employee Information

1 Select the employee record you want to edit or view from the Employees grid, then click the **Toggle** toolbar button.

2 Edit the necessary information in the selected Employee record.

Refer to “Adding Employees” for information on field definitions and entries.

3 Click the **Save** toolbar button to save your changes.

4 Click the **Toggle** button to return to the Employees grid.

Printing and Exporting Employee Information

Several options to print and export Employee information are provided in CRM. Refer to the following chapters for additional information:

- To print a report on all Employee records in the Employee grid, refer to “Printing All Records in a Grid”.
- To print preloaded and user-defined reports, refer to “Using the Reports Menu Option”.
- To export the Employees grid or a specific record within the Employees grid and save it in a specified format, refer to “Exporting Grid Contents”.

Using the Security Feature

The security feature enables users to access and/or perform specific actions based on settings the system administrator assigns. Set up users in VISUAL Manufacturing, then import them into CRM.

The **Security, User,** and **User Type** buttons on the navigation bar allows you to establish security settings for users in CRM. You can set up accessibility to each application in CRM from the Navigation Bar and Option Bar. You can allow or disallow certain procedures in each application, such as select (view), edit, add, delete, or full, set permissions for specific tabs within a record, and performing certain actions such as generating an invoice, converting a quote to an estimate, assigning sales options, creating document types, etc.

The User Type feature lets a system administrator configure specific settings for different user types, such as Sales and Marketing. These user types group users together so that the system administrator can quickly assign security settings to users based on their user type.

Accessing the User Grid

Expand the Admin module in the navigation bar by clicking the **+** button beside Admin, then click the **+** button beside the Security feature. Click the **User** button.

The Users grid lists basic information about each user. You can change the way you view information in this grid by using the filter options and customizing columns. See "CRM Grids" on page 3–22.

Adding Users

Add users in VISUAL Manufacturing. After you add users, import them into CRM.

To import users:

1 Click the **Import VM Users** toolbar button, or right-click within the Users grid and select **Import User(s) from VM**.

2 Choose the VISUAL user(s) you want by selecting the check box beside each user.

3 Click **Import** to import the user(s) into CRM.

4 Click **Cancel** to exit the window without importing any VISUAL users.

If you imported VISUAL users, the selected users appear in the CRM Users grid.

Specifying Security Settings

After you import users, you can customize each user’s CRM security settings.

1 In the User grid, double-click the user.

2 Enter the following information in the New User window.

User ID – The User ID specified in VISUAL Manufacturing is inserted.

Type – Click the drop-down list to select a type from the list.

To create user types, see "Adding User Types" on page 13–27.

Emp ID – If the user you are creating is also an employee, click the **Emp ID** button to select an Employee ID from the list, or specify the Employee ID in the field provided. The Employee ID field establishes a relationship between the user and the existing CRM employee.

If the new user is a sales rep who requires ownership capabilities for accounts, the sales rep must also be an employee and a relationship between the employee and user must be established.

The Employee window contains all employees that have been entered in CRM. You must specify an employee in CRM before you can select a name from the list.

After an Employee ID has been entered in the Emp ID field, click the **View Detail** button to view employee details in the bottom pane. You must click the **Save** toolbar button before accessing the Employee window.

3. Select the **OK** button to save your changes, or the **Cancel** button to exit the Set Password For window without saving changes.

   Refer to the following tabs to add security permissions to the user.

Entering Information in the Navigation Bar Tab

The Navigation Bar tab allows the system administrator to select which features on the navigation bar the user can access while in CRM.

1. If necessary, click the **Navigation Bar** tab to view navigation bar access information.

   The items listed in the **Navigation Bar Item** column indicate the modules and features on the navigation bar.

2. To view or hide features, click the **+** or – symbol to the left of each module. For example, click the **+** button beside the Sales module to view all the features within Sales.
3. To allow access to a bar item, select the check box beside the feature. When you select a check box beside a module, such as **Contact Center** or **Sales**, the remaining features are selected as well. To allow access to certain features, such as **Accounts** or **Opportunities** select each feature separately.

   Leave the check boxes blank if you do not want users to have access to a module or feature.

   Note: Users may be able to access navigation bar features through other areas such as the options bar, or browse buttons. To disallow or allow access in all areas of CRM, select or deselect the same options in the Object tab. Be aware that users who have access to the Admin module can then alter their own security settings.

4. Click the **Save** toolbar button to save your additions.

Entering Information in the Object Tab

The Object tab allows or disallows users to perform certain functions within CRM, such as viewing, editing, adding, deleting, or full access.

1 Click the **Object** tab.

2 Refer to the following information when adding information in the Object tab.

Object Name – Describes the accessible features in CRM. Click the **+** or **–** signs to the left of the main object name to view or hide sub-object names.

Select – Selecting the check box under the **Select** column allows the user to select and view items within the specified feature.

To disallow access, leave the box unchecked.

Edit – Edit allows the user to make and save changes within a feature. Select the check box next to the object name to allow the user access to this feature.

To disallow access, leave the box unchecked.

Add – Add allows the user to add a new record within a feature. Select the check box next to the object name to allow the user access to this feature.

To disallow access, leave the box unchecked.

Delete – Delete allows a user to delete records within a feature. Select the check box next to the object name to allow the user access to this feature.

To restrict access, leave the box unchecked.

Full – Full allows a user to perform Select, Add, or Delete operations within a feature. Select the check box next to the object name to allow the user full access to this feature.

To disallow access, leave the box unchecked.

Clear All – Click the **Clear All** button to clear all the checks in the Object grid.

Grant All – Click the **Grant All** button to select all boxes in the Object grid.

3 Click the **Save** toolbar button to save your additions.

4 To return to the Users grid, click the **Toggle** button.

Entering Information in the Tab Tab

The Tab tab allows or disallows users access to specified tabs in the Account, Calls, and Contract windows.

1 Click the **Tab** tab.

2 If necessary, click the **+** sign beside the window for which you would like set tab permissions.

3 Select the **Allowed** check box next to the tab you would like the user to access. If you do not want the user to access a specified tab, select the check box until the check mark is removed.

4 Click the **Save** toolbar button.

Entering Information in the Process Tab

The Process tab allows you to restrict or allow access of specific actions or processes that involve selected records to CRM users.

1 Click the **Process** tab.

2 Click the **+** sign beside the process name to expand that process.

3 For each process that you want the user to perform select the check box in the **Allowed** column. Deselect the check box to make a process option unavailable to the user.

4 Click the **Save** toolbar.

Entering Information in the Report Tab

Use the Report tab to allow or deny access to reports in CRM modules.

1 Click the **Report** tab.

2 Click the **Plus** button to expand the options under each module to view the full list of reports available in each module.

3 Select the **Allowed** check box next to the reports you want the user to access. Clear the check box to prevent the user from running the report. If you select or clear the check box next to a particular module name, the system applies the same setting to all of the reports in the module.

4 Click the **Save** toolbar.

Entering Information in the Fields Tab

Use the Fields tab to restrict or allow access of specific fields.

1 Click the **Fields** tab.

2 To view the list of fields for a window or tab, click the **+** sign next to the name of the window or tab.

3 For each field, select from the following options:

Full - Select Full to give the user full permission to view and edit the field.

Note: Object Edit security overrides field security settings. If the user does not have edit access based on default settings for a grid column, the user does not have access even if the Full option is selected in the Fields tab.

Read Only - Select Read Only to give the user permission only to view the information in the field. The user cannot edit the field.

Note: Default grid row edit settings override field security settings.

None - On Detailed windows, the system replaces the field with “Restricted.” In Grids, the system hides the column. Users cannot see columns with the None setting in column selection fields. If an existing grid layout includes a restricted field, the system does not display the field.

Note: If a user has object add/edit access, you must provide full field access to required fields.

Editing Users

1 With the appropriate record selected in the Users grid, click the **Toggle** button.

Refer to the field definitions and instructions in “Specifying Security Settings” to edit the selected user record.

2 Click the **Save** toolbar button after you are finished editing.

3 To return to the Users grid, click the **Toggle** button, or click the appropriate button on the navigation bar.

Click **Cancel** to abort the deletion process completely.

Maintaining SQL Users

Note: Your SQL system should automatically create and delete SQL Users for you. If you have an old version, you may need to manually add or delete users, but this is very rare.

You can add SQL users from your SQL application to CRM from the Users grid. You can also remove SQL users from the Users grid.

Adding SQL Users

1 Click the **+** sign beside the Admin, then click the **Security** button.

2 Right-click your mouse and select **Create SQL User** from the menu.

3 In the Specify Password dialog, specify your password in the Password field.

4 Re-enter your password in the Confirm Password field.

5 Click **OK** to access your SQL application.

See your SQL documentation while operating in your SQL application.

Deleting SQL Users

Select the SQL User you want to delete from the Users grid.

Right-click your mouse in the Users grid and select **Delete SQL User** from the menu.

The SQL User is removed from the Users grid.

Accessing the User Type Grid

User Types are like security setting templates. They allow you to create security settings and attach multiple users to those settings so that you do not have to individually assign security settings for multiple users that have the same security requirements.

Expand the Admin module in the navigation bar by clicking the **+** button beside Admin, then click the **+** button beside the Security feature.

Click the **User Type** button.

The User Type grid lists basic information about each user type. You can change the way you view information in this grid by using the filter options and customizing columns. See “CRM Grids” on page 3-22.

Adding User Types

The user types feature lets you assign user and security settings to users based on their work function. For example, you can create a user type named “Sales.” When you create a new user and assign the user type “Sales,” the new user will take on all the security and user settings of the Sales user type.

After you create a user type, the user type name appear in the Type drop down list in the User and New User windows.

1 Click the **New** toolbar button, or right-click in the User Types grid and select **New Record** from the menu.

   The New User Type window includes the following active tabs: **Navigation Bar**, **Object, Tab** and **Process**.

2 Specify this information in the New User Type window.

   User Type – Specify a name that uniquely identifies the user type. Specify up to eight characters.

   Description – Specify a description of the user type.

3 Click the **Save** toolbar button to save your additions.

   Refer to the following tabs to add information to the new type.

Entering Information in the Navigation Bar Tab

The Navigation Bar tab allows the system administrator to select which features on the navigation bar the user can access while in CRM.

1 If necessary, click the **Navigation Bar** tab to view navigation bar access information.

   The items listed in the **Navigation Bar Item** column indicate the modules and features on the navigation bar.

2 To view or hide features, click the **+** or – symbol to the left of each module. For example, click the **+** button beside the Sales module to view all the features within Sales.

3 To allow access to a bar item, select the check box beside the feature. When you select a check box beside a module, such as **Contact Center** or **Sales**, the remaining features are selected as well. To allow access to certain features, such as **Accounts** or **Opportunities** select each feature separately.

Leave the check boxes blank if you do not want users to have access to a module or feature.

Note: Users may be able to access navigation bar features through other areas such as the options bar, or browse buttons. To disallow or allow access in all areas of CRM, select or deselect the same options in the Object tab. Be aware that users who have access to the Admin module can then alter their own security settings.

4 Click the **Save** toolbar button to save your additions.

Entering Information in the Object Tab

The Object tab allows or disallows users to perform certain functions within CRM, such as viewing, editing, adding, deleting, or full access.

1 Click the **Object** tab.

2 Refer to the following information when adding information in the Object tab.

Object Name – Describes the accessible features in CRM. Click the **+** or **–** signs to the left of the main object name to view or hide sub-object names.

Select – Selecting the check box under the **Select** column allows the user to select and view items within the specified feature.

To disallow access, leave the box unchecked.

Edit – Edit allows the user to make and save changes within a feature. Select the check box next to the object name to allow the user access to this feature.

To disallow access, leave the box unchecked.

Add – Add allows the user to add a new record within a feature. Select the check box next to the object name to allow the user access to this feature.

To disallow access, leave the box unchecked.

Delete – Delete allows a user to delete records within a feature. Select the check box next to the object name to allow the user access to this feature.

To disallow access, leave the box unchecked.

Full – Full allows a user to perform Select, Add, or Delete operations within a feature. Select the check box next to the object name to allow the user full access to this feature.

To disallow access, leave the box unchecked.

Clear All – Click the **Clear All** button to clear all the checks in the Object grid.

Grant All – Click the **Grant All** button to select all boxes in the Object grid.

3 Click the **Save** toolbar button to save your additions.

4 To return to the Users grid, click the **Toggle** button

Entering Information in the Tab Tab

The Tab tab allows or disallows users access to specified tabs in the Account detail window.

1 Click the **Tab** tab.

2 If necessary, click the **+** sign beside the **Account Form** option to expand the account tabs.

3 Select the **Allowed** check box next to the account tab you would like the user to access. If you do not want the user to access a specified account tab, select the check box until the check mark is removed.

4 Click the **Save** toolbar button.

Entering Information in the Process Tab

Use the Process tab to restrict access to specific menu selections and account lookups for individual users or users belonging to specific groups.

1 Click the **Process** tab.

2 If you want to allow the user access to Menu Items, expand the Menu Items list by clicking the Plus icon to the left of Menu Items.

   Note: This is a partial list of Menu Items.

   During the setup process, all of the Allowed check boxes appear clear indicating that the user or user group is restricted to ALL of the items in the list.

3 For all of the items in the list to which you want to allow the user access, select the check box.

   If you want to allow access to all of the items in the list, select the check box next to Menu Items.

   To restrict the user, clear the check box.

4 To allow the user access to Lookups, also known as searches, in specific CRM modules,select and expand that module by clicking the Plus icon to the left.

5 For all of the items in the list to which you want to allow the user access, select the check box.

   You can allow or deny access to:

   All Accounts – All account appear in the lookups.

   My Accounts – Only the accounts assigned to the specified user.

   Owned Accounts – Only the accounts created by the user currently logged on.

   Sales Rep Accounts – If your are logged on as a Sales Rep, only the accounts assigned to you appear. For more information on maintaining Sales Reps, refer to "Maintaining Sales Reps" on page 2–8.

Alternate Sales Rep Accounts – If your are logged on as a Sales Rep, the account to which you have been assigned as an Alternate Sales Rep also appear.

6 When you have set up all of the restrictions and accesses for this user or user group, click the **Save** toolbar button.

Entering Information in the Report Tab

Use the Report tab to allow or deny access to reports in CRM modules.

1 Click the **Report** tab.

2 Click the **Plus** button to expand the options under each module to view the full list of reports available in each module.

3 Select the **Allowed** check box next to the reports you want the user type to access. Clear the check box to prevent the user type from running the report. If you select or clear the check box next to a particular module name, the system applies the same setting to all of the reports in the module.

4 Click the **Save** toolbar.

Entering Information in the Fields Tab

Use the Fields tab to restrict or allow access of specific fields.

1 Click the **Fields** tab.

2 To view the list of fields for a window or tab, click the **+** sign next to the name of the window or tab.

3 For each field, select from the following options:

Full - Select Full to give the user full permission to view and edit the field.

Note: Object Edit security overrides field security settings. If the user does not have edit access based on default settings for a grid column, the user does not have access even if the Full option is selected in the Fields tab.

Read Only - Select Read Only to give the user permission only to view the information in the field. The user cannot edit the field.

Note: Default grid row edit settings override field security settings.

None - On Detailed windows, the system replaces the field with “Restricted.” In Grids, the system hides the column. Users cannot see columns with the None setting in column selection fields. If an existing grid layout includes a restricted field, the system does not display the field.

Note: If a user has object add/edit access, you must provide full field access to required fields.

Creating User Types from an Existing User Type

You can create a new user type by copying an existing user type, then editing the new type to make it unique.

1 From the User Type window, specify the ID for the new type.

2 Click the **Copy From** drop-down button and select the type you want to use as the basis for the new type.

The system inserts the information from the type you selected into the User Type window

3 Edit information as necessary, then click Save. The system creates the new user type.

Editing User Types

1 With the appropriate record selected in the User Type grid, click the **Toggle** button.

Refer to the field definitions and instructions in “Adding User Types” to edit the selected user type record.

2 If you would like to update the users assigned to the user type with the changes you made, select the **Update all associated users to this setting** check box. The system displays this check box on each tab so you can specify what type of user settings you would like to update.

3 Click the **Save** toolbar button after you are finished editing.

4 To return to the User Type grid, click the **Toggle** button, or click the appropriate button on the navigation bar.

Deleting User Types

In order to delete a user, you must open the selected user.

1 From the User Type grid, select the user type you want to delete, then click the **Toggle** button.

2 Click the **Delete** toolbar button to delete the user.

3 In the dialog, click **Yes** to delete the user, or **No** to cancel the deletion.

Printing and Exporting User and User Type Information

There are several options to print and export User and User Type information in CRM. Refer to the following chapters for additional information:

- To print a report on all User or User Type records in the Users or User Types grid, refer to “Printing All Records in a Grid”.
- To print preloaded and user-defined reports, refer to “Using the Reports Menu Option”.

- To export the Users or User Types grid or a specific record within the Users or User Types grid and save it in a specified format, refer to “Exporting Grid Contents”.

Using the Reports Feature

The Reports feature allows you to print and/or view preloaded and custom reports for most features in CRM. Create custom reports using Crystal Decisions Crystal Reports software.

The Reports feature acts as a template for printing a type of report. To print reports, you must open the grid or window that includes the information you want to print.

Create multiple report templates for one grid or window using the **Reports** menu option on the main menu.

Preloaded reports are available in detail or grid type for **Accounts**, **Contacts**, **Tasks**, **Calls**, **Issues**, **Opportunities**, **Quotes**, **Contracts**, and **Service Orders**. Customized reports are available in all the features that preloaded reports include plus additional features.

For information on Generating Invoice reports, refer to “Generating Invoices,” on page 10–48.

Accessing the Reports Grid

1 Expand the Admin module by clicking the **+** button on the navigation bar beside Admin.

2 Click the **+** button beside the Reports feature.

3 Click the **Reports, Standard Reports**, or **Custom Reports** button.

The Reports grid is the same grid no matter which report option you select (Reports, Standard or Custom), however the reports within the grid are different. Refer to the following Report options for more information.

Reports and Standard Reports features:

The Reports grid contains preloaded detail reports for most grids. You do not need Crystal Decisions Crystal Reports software to view preloaded reports.

Custom Reports feature:

The Reports grid contains all the custom reports added to CRM. You must create custom reports using Crystal Decisions Crystal Reports software. Custom reports allow you to print additional information and change the order or appearance of your report to accommodate your specific needs.

You can change the way you view information in this grid by using the filter options or customizing columns. See “CRM Grids” on page 3-22.

Adding a Report

1 From the Custom Reports feature grid, click the **New** toolbar button, or right-click in the Reports grid and select **New Record** from the menu.

2 Refer to the following information in the New Report window.

Report ID – You cannot edit this field. A system-assigned number that identifies the report.

Type – Click the drop-down list to select the type of report you want to add.

Select from **Custom**, **Custom Detail**, **Detail** and **Invoice**.

Context – Click the drop-down list to select a context from the list. Choose from **Global**, or **User**.

If you select **User**, the report is only be available for the specified user in the User ID field. If **System** is selected, the report is available for all users.

User ID – If **User** is selected in the Context field, click the **Browse** button to select a user name from the list. The report is only available for the selected user.

Menu Choice – The grid or window the report can be accessed. Click the drop-down list to select a grid or window for your report.

Menu Text – Specify the title of the report. The text in this field is viewable in the specified grid under the Reports menu option.

Report File – Click the **Report File** button to create a path for the report. A report path indicates where the report is saved on your computer, network, diskette, etc.

Description – Specify a brief description of the report.

3 Click the **Save** toolbar button to save your additions, or click the **Yes** button when exiting the New Report window.

Editing Reports

You can edit all fields in the Custom Reports feature, and selected fields within the Standard Reports feature. Refer to the following for more information.

1 With the appropriate report selected in the Reports grid, click the **Toggle** button at the upper left side of the grid.

Refer to the field definitions and instructions in “Adding a Report” to edit the selected record.

If you are editing a custom report, you are allowed to edit any field available in the Report detail window.

If you are editing a standard report, you can edit the following fields.

Context, User ID, Menu Choice, Menu Text, Report File, and Description.

Refer to “Adding a Report” for more information on each field.

2 Click the **Save** toolbar button after you are finished editing.

3 To return to the User Reports grid, click the **Toggle** button, or click the appropriate button on the navigation bar.

Deleting/Undeleting Reports

You can delete custom or standard reports from the appropriate Reports grid.

1 With the appropriate record selected in the User Reports grid, click the **Delete** toolbar button, or select **Edit**, **Delete Record(s)** from the main menu.

2 In the Record Deletion dialog, click **Yes** to delete the report, or **No** to cancel the deletion.

3 With the deleted record selected, you can undelete the record by clicking the **Delete** toolbar button again, or select **Edit**, **Undelete Record(s)** from the main menu.

4 To permanently save your changes, click the **Save** toolbar button, or click **Yes** when exiting the grid.

Printing a Report

To print a report, you must access the feature containing the information you want to print. For example, to print account information, open the Accounts grid.

Open the grid that contains the information you want to print, then select the record(s) you want to include in your report.

Select **Reports** from the main menu, then click the report you want to print.

Preloaded reports are contained within CRM that are available for most features from the Reports main menu option. You have the option to create your own reports using Crystal Decisions Crystal Reports software. Refer to "Adding a Report" on page 13–33 for more information.

Associated records are also printed using the information available in the option bar. Associated records are those records that relate to the selected record(s), such as an opportunity, service order, or call created for the selected record. The associated records print at the end of the selected record.

The Account Detail report prints the selected record information along with the following associated records: Addresses, Appointments, Contacts, Tasks, Notes, Documents, Calls, Contracts, Service Orders, Opportunities, Quotes, Orders, and Receivables.

To navigate within the print preview window, refer to “Using the Print Preview Window,” on page 4–24.

Printing and Exporting Report Information

Several options to print and export Report information are provided in CRM. Refer to the following chapters for additional information:

- To print a report on all Report records in the Reports grid, refer to “Printing All Records in a Grid”.
- To export the Reports grid or a specific record within the Reports grid and save it in a specified format, refer to “Exporting Grid Contents”.

Using the Application Builder Feature

Use the Application Builder feature to create your own feature and access your feature from one or multiple locations in CRM.

The Application Builder allows you to create and customize records, grids, and fields that are contained in the new feature, and can be associated with your pre-designed CRM features, such as accounts or contacts.

For example, you can create a new feature that allows you to list all the products a customer has purchased from your company in an associated file without cluttering the user tab in your customer account file. You have your own grid for customer products that allows you to view all customer products owned, as well as filter your columns and print general reports.

Note: There are two Application Builder menu options on the Navigation Bar (seen as App Builder). One Application Builder is a module, where the other is a feature (an option that is within a module, like Contacts within the Contact Center module). To create an application, refer to the steps below. To access your application in the Application Builder, refer to "Using the Application Builder Module," on page 12–3.

1 Click the **+** sign beside the Admin module, then click the **App Builder** feature.

The Define Custom Modules window allows you to design the shell of the feature you want to create and its relationships to other CRM features. Once this is created, you can add fields to your feature using the **User Defined Fields** in the **Admin** module.

2 Enter the feature name in the **Name** column.

3 Press the **Tab** key, or click the cell in the **Plural Version of Name** column in the same row.

4 Enter the plural name of your feature in the **Plural Version of Name** column.

This is the name of the feature or application you see in the Navigation Bar under the App Builder module.

5 You can change the order of how each feature is displayed in the Navigation Bar by selecting the feature you want to move, then clicking the **Arrow** buttons located to the right of the window.

Each time you click the **Arrow** button, the selected feature moves up or down one row.

6 If you want the feature to be visible from other features in CRM, click the Define Relationships button.

If you do not define a relationship, the application you create, even if it is associated with a specific record, will not be accessible in any other area of CRM except in the App Builder module. Skip to step 11 to continue without defining relationships.

7 Click the **Module To Relate To** drop-down list to select the module to which the selected feature will be visible.

You can relate your feature or application to pre-defined CRM features, but not features that you created using the Application Builder.

Choose from one of the following options: **Account**, **Address**, **Appointment**, **Call**, **Contact**, **Contract**, **Estimate**, **Opportunity**, **Order**, **Part**, **Quote**, **Service Order**, or **Task**.

8 Click the **Type of Relationship** drop-down list to select the type of relationship for your feature. The relationship determines where each of these items are accessed, such as windows and option bars, and how many items can be assigned or associated to each application. Refer to the following two options for more information.

1-M (One to Many) – The One to Many (1-M) option allows the user to access the application (created from the application builder) from the associated feature's option bar. However, the associated feature is not available from the application's option bar, but from the detail form.

For example, if I create an application called Products and I assign a 1-M relationship with the Accounts feature. When I open the Accounts feature, the Products application is displayed in the option bar. However, when I open the Products application, I do not see Accounts in the option bar, but I will find an Accounts field in the Detail window.

Since the user cannot access the feature from the application's option bar, only one feature can be associated to an application record. Using the example above, since the user cannot access Accounts from the Products option bar, only one account can be associated with a Product record.

M-M (Many to Many) – The Many to Many (M-M) option allows you to access the application (created from the application builder) from the associated feature's option bar. And the associated feature can be accessed from the application builder's option bar. The associated feature is not in the detail form of the application.

For example, if I create an application called Products and I assign a M-M relationship with the Accounts feature, when I open the Accounts feature, the Products application is displayed in the option bar. When I open the Products application, the Accounts feature is in the option bar. There is no Account field in the detail form of the Products application.

Since the user can access the feature from the application's option bar, multiple features can be associated with an application record. Using the example above, since the user can access Accounts from the Products option bar, multiple accounts can be associated with one Product record.

9 Click the **Add** button to add the relationship to the relationships below.

10 To create additional relationships for the selected feature, repeat steps 7 through 9.

11 Click **OK**.

The application you created is visible in the App Builder module on the Navigation bar.

Note: Before you can begin creating new records in your application, you need to create user-defined fields.

Using the User Defined Fields Feature

Use the User Defined Fields feature to create and maintain user defined fields for all features in CRM that contain a User tab and any application you create using the Application Builder. User defined fields allow you to specify additional information to each file within the specified feature. User defined fields not only customize your data, but allow you to locate information quickly and print concise reports when you add user defined fields to your grid.

You have the ability to add text, integer, currency, decimal, date, and boolean fields. You can choose whether or not to include the field you created as an option on the grid, specify the number of characters each field contains, and the order in which fields appear on the User tab. You can also add a list to text fields and constrain field entries to the list if necessary.

Add user defined fields to the following CRM features: Account, Address, Appointment, Call, Call Issue, Competitor, Contact, Contract, History, Opportunity, Quote, Quote Line, Service Order, Task, and any applications you created using the Application Builder module.

Accessing the User Defined Fields Layout Window

Expand the Admin module in the navigation bar by clicking the **+** button beside Admin, then click the **User Defined Fields** button.

If you are in a grid that applies to the user defined field layout and you access the User Defined Fields feature, the User Defined Field Layout window opens with the user defined fields of the grid you have opened behind the User Defined Field Layout window. For example, if you open the Calls grid, then select the **User Defined Fields** button, the User Defined Fields Layout window opens with the user defined fields of the Calls feature.

Refer to the following to add, edit, delete and undelete user defined fields.

Adding User Defined Fields

You can add 30 text, 15 numeric, and five date field types to the Accounts feature. For all other features, you can add five text, five numeric, and three date fields.

1. Click the **User Defined Fields** button in the navigation bar.
2. Click the drop-down list beside the Configure User Defined Fields For field to select a feature where you want these user defined fields to be accessible.

   Choose from **Account**, **Address**, **Appointment**, **Call**, **Call Issue, Competitor**, **Contact**, **Contract**, **History, Opportunity**, **Quote**, **Quote Line, Service Order**, **Task,** and any one of the applications you created using the Application Builder module.
3. Click the drop-down list beside the Field Type field to select the type of field you want to add to the User tab.

   Choose from the following fields:

Text – Allows the user to specify text into the field. This can be combined with a list to create user-defined options in a list box.

Integer – Allows the user to specify numeric data into the field.

Decimal – Allows the user to specify decimal format data.

Currency – Allows the user to specify currency information.

Date – Allows the user to specify a date using the Calendar feature.

Boolean – Allows the user to select a check box.

4 Click the **Add** button to add the field to the table in the **Currently Defined Fields** section.

The user defined field is automatically added to the bottom of the list.

5 See this information in the table to complete the field.

Field Type – You cannot edit this field. The field type indicates what type of information can be entered in the field, such as date, text, or integer.

Caption – Specify the title of the field. This is the text that is displayed beside the field. A default description is supplied based on the field type you selected and the number of field types you created in the list.

Length – Only applicable for the text type field. The maximum number of characters the field allows is automatically entered in the **Length** column, however you can edit this field to specify from 1 to the maximum character length if necessary.

Use List – Available only when a text field type is selected. Select the check box to apply a drop down list of user-defined selections to the text field. Refer to "Defining a List" on page 13–39 for more information.

Available to Grid – This check box is automatically selected. If you leave the check box selected, the field is displayed as an option for viewing on the grid in the Customize Columns window. If you do not select the check box, the field is not available to view on the grid. See “CRM Grids” on page 3-22.

6 To change the order of user defined fields in the User tab, select the field you want to move, then click the **Up** or **Down** arrows to the right of the table.

7 Click **OK** to save your changes and exit the User Defined Fields Layout window, or **Apply** to remain in the window.

Click **Cancel** to exit the window without saving changes.

Defining a List

You can add a drop down list to any text field type, and constrain that field to selecting just the options on the list, if necessary. Drop down lists only apply to text field types.

1 From the User Defined Field Layouts window, select the **Use List** check box for the appropriate text field.

2 Click the **Define List** button at the bottom of the window.

3. Click the first empty cell under the **ID** column and specify an ID for the drop down option.
4. Use your **Tab** key or click the cell in the same row under the **Description** column and specify a description or title of the drop down option.

   The text in this field is displayed as the option in the drop down list of the User tab.
5. Click the Specify or **Tab** key, or click the **Insert Row** button to add another selection to the drop-down list.
6. To allow the user to specify text not included in the drop down list, clear the **Constrain To List** check box. This check box is automatically selected so that users are required to specify one of the options in the drop down list.
7. Click **OK** to save your changes and return to the User Defined Field Layout window.

Editing User Defined Fields

1. Expand the Admin module in the navigation bar by clicking the **+** button beside Admin, then click the **User Defined Fields** button.

   If you are in a grid that applies to the user defined field layout and you access the User Defined Fields feature, the User Defined Field Layout window opens with the user defined fields of the grid you have opened behind the User Defined Field Layout window. For example, if I open the Calls grid, then select the **User Defined Fields** button, the User Defined Fields Layout window opens with the user defined fields of the Calls feature.
2. Click the drop-down list beside the Configure User Defined Fields For field to select the feature that contains the user defined fields you want to edit.
3. See “Adding User Defined Fields” for field definitions and procedures.
4. When you are finished editing, click **OK** to save your changes and exit the User Defined Field Layout window, or **Apply** to remain in the window.

   Click **Cancel** to exit the window without saving changes.

Deleting/Undeleting User Defined Fields

1. Select the user defined field(s) you want to delete from the User Defined Field Layout window.
2. Right-click your mouse and select **Delete Record** from the menu.
3. With the deleted field selected, you can undelete the field (as long as the field has not been saved) by right-clicking your mouse and selecting **Undelete Record** from the menu.
4. To permanently save your changes, click **OK**, or click **Yes** when exiting the grid.

Using the Navigation Bar and Plug-Ins Feature

The Navigation Bar feature allows you to customize your navigation bar. You can change the location and name of a module or feature; enable, disable, view, or hide modules and features; and create your own executables on the Navigation Bar. You can also add custom executables in the Actions menu for selected grids.

Accessing the Navigation Bar Feature

Click the **+** sign beside the Admin module.

Click the **Navbar and Plug-Ins** button.

The Navigation Bar contains two tabs: **Navigation Bar** and **Action Menu**.

The Navigation Bar tab allows you to change the properties of modules and features. The Action Menu tab allows you to add custom executables to the Actions menu for specific grids.

To view the features of a module, expand the module by clicking on the **+** sign beside the module. To hide the features, click the **–** sign beside the module. Click the **+** or **–** symbols beside the features to view or hide sub-features.

When you create an executable on the navigation bar, the **Light bulb** icon precedes the navbar item title.

Editing a Navigation Bar Item

The Navigation Bar and Plug-In Customization window allows you to edit the location and name of a module or feature in the navigation bar. You can also hide or view, and enable or disable the navigation bar item. To edit custom navigation bar items, refer to “Editing an Executable on the Navigation Bar”.

1 From the Navigation Bar Customization window, find the navigation bar item you want to edit.

2 Select the navigation bar item (module, feature, or executable).

3 Refer to the following information to edit your navigation bar item.

Button ID – You cannot edit this field. The Button ID is the unique code that identifies the navigation bar item.

Parent ID – You cannot edit this field. The Parent ID if the identification code of the navigation bar item that contains the selected feature you are editing.

Type – You cannot edit this field. The Type field indicates which navigation bar items are standard CRM features and modules, labeled **Standard**, customized executables, labeled **Plug Ins**, and application builder features, labeled **AppBuilder**.

Description – Specify the name of the feature or module in the description field. This is the name of the navigation bar item on the Navigation Bar.

Note: You can edit the description of a module or feature by double-clicking on the navigation bar item in the navigation bar text box.

Enabled – Select the **Enabled** check box to allow users to access the grid and records associated with this feature or module. If you do not want users to access the associated grid or records, select the check box to remove the check mark.

Visible – Select the **Visible** check box to view and access the selected feature or module. To hide the selected navigation bar item on the navigation bar, select the check box to remove the check mark.

4 You can restore the Navigation Bar back to the original CRM default by clicking **Reset to Defaults**.

5 You can move each navigation bar item by clicking and holding the item you want to move with your mouse, then move your mouse to the location where you want to access the item (as you move your mouse over each item in the navigation bar text box the item will highlight, indicating where the module, feature, or sub-feature you are moving will be placed if you release your mouse button). Release your mouse button when your mouse has highlighted the appropriate module, feature, or sub-feature you want. The item is placed in the location you selected. You can create modules by moving the selected item outside of the list of navbar items (where no navbar items are highlighted) while still in the text box.

6 To save your changes and remain in the Navigation Bar Customization window, click **Apply**.

To save your changes and exit the window, click **OK**.

To exit the window without saving changes, click **Cancel**.

Creating an Executable on the Navigation Bar

You can create and apply an executable to the CRM Navigation Bar as a module, feature or sub-feature.

1 Find and select the module or feature where you want to add your executable.

2 Click the **Add Plug-In** button, or right-click your mouse over the item to which you want to add your new item and select **Add New Navbar Item** from the menu.

3 Refer to the following information to add your executable to the navigation bar.

Button ID – You cannot edit this field. A unique code that identifies the feature or sub-feature. The button is automatically named when you click the **Add Plug-In** button.

Parent ID – You cannot edit this field. The Parent ID is the identification code of the navigation bar item that contains the selected feature you are editing.

Type – You cannot edit this field. When you add a navigation bar item, the Type field is automatically populated with **Executable**.

Description – Specify the name of the feature or sub-feature in the description field. This is the name of the navigation bar item in the Navigation Bar.

Enabled – Select the **Enabled** check box to allow users to access the executable associated with this module, feature or sub-feature. If you do not want users to access the executable, select the check box to remove the check mark.

Visible – Select the **Visible** check box to view and access the selected navbar item. To hide the selected navigation bar item on the navigation bar, select the check box to remove the check mark.

4 To specify a path for your executable, click **Browse**.

In the Select a file dialog, find the executable you want to add to the item, then click **Open**.

The path of the executable is added in the **Command to Run Plug-In** text box.

5 You can insert additional parameters to your executable by clicking **Insert Parameter**.

If you do not need to insert parameters, skip to step 9.

The Insert Parameters function allows you to specify additional information needed to run your executable, such as a database, or user login.

6 In the Lookup dialog, select the appropriate parameter, then click **OK**.

7 To insert additional parameters, click **Insert Parameter** again.

8 Click **Apply** in the Navigation Bar Customization window to save your additions.

Click **OK** to save your additions and exit the Navigation Bar Customization window.

Click **Cancel** to exit the window without saving changes.

Editing an Executable on the Navigation Bar

You can edit and copy an executable navigation bar item using the Navigation Bar Customization window.

1 From the Navigation Bar Customization window, find and select the feature or sub-feature executable you want to edit.

2 Refer to “Creating an Executable on the Navigation Bar” for field definitions and procedures.

3 You can copy an executable by selecting the item you want to copy, then right-click your mouse and select **Copy NavBar Item** from the menu.

4 You can move each navigation bar item by clicking and holding the item you want to move, then move your mouse to the location where you want to access the item. When you move over a feature, sub-feature, or module, they are highlighted, indicating where your selected item will be if you released your mouse button.

5 When you are finished editing the selected executable, click **Apply** or **OK**.

Deleting an Executable on the Navigation Bar

You can delete an executable navigation bar item in the Navigation Bar Customization window.

1 Find the item you want to delete in the navigation bar text box.

2 Select the item you want to delete, then right-click your mouse and select **Delete Navbar Item** from the menu.

   Note: If you delete an executable that contains features or sub-features, these features will be deleted as well.

3 Click **Apply** or **Save** to save your changes.

4 To restore the navigation bar to the original CRM defaults, click **Reset to Defaults**.

Caution: All executables will be removed if you select Reset to Defaults.

Adding an Executable to the Action Menu

You can add one or more executables as options on the Actions menu for selected grids.

1 From the Navigation Bar and Plug-In Customization dialog, click the Action Menu tab.

2 Click the first available cell under the **Menu Text** column, then type the name of the executable.

   The information you specify in this cell is displayed as the name of the executable in the Actions menu.

3 Press the **Tab** key or click in the Show For cell in the same row.

4 Click the **Show For** drop-down list to select the feature where you want to access your executable.

   The Actions menu is feature-specific, meaning each Actions menu differs based on the feature you access.

   Choose from the following features: **Account**, **Address**, **Appointment**, **Call**, **Competitor**, **Contact**, **Contract**, **Estimate**, **History Item**, **Opportunity**, **Order**, **Part**, **Quote**, **RMA**, **Receivable**, **Service Order**, **Shipment**, **Task**, and any other feature you created using the Application Builder feature.

5 Press the **Tab** key or click in the **Command to Run Plug-In** column in the same row.

6 To specify one or more parameters for the selected executable, click **Browse**.

7 In the Select a file dialog, find the executable you want to add to the item, then click **Open**.

   The path of the executable is added in the **Command to Run Plug-In** text box.

8 You can insert additional parameters to your executable by clicking **Insert Parameter**.

   The Insert Parameters function allows you to specify additional information needed to run your executable, such as a database, or user login.

9 In the Lookup dialog, select the appropriate parameter, then click **OK**.

10 To insert additional parameters, click **Insert Parameter** again.

11 Click **Apply** in the Navigation Bar Customization window to save your additions.

Click **OK** to save your additions and exit the Navigation Bar Customization window.

Click **Cancel** to exit the window without saving changes.

Defining Folder Visibility for the Mail Node

The Navigation Bar and Plug-In Customization window allows you to edit the folders displayed for the Mail module.

1 From the Navigation Bar and Plug-In Customization window, click the **Mail Node** tab.

2 Expand the Mail folders by clicking on the + button beside Mail.

3 Select a folder that you do not want to display in the Mail module.

4 Clear the **Visible** check box. Mail folders selected to be hidden from view in the Mail module appear gray. All Mail folders are visible by default.

5 Click **Apply** to save your preferences.

Click **OK** to save your preferences and exit.

Click **Cancel** to exit the window without saving changes.

Using the Utilities Feature

Use CRM utilities to import text records, import VISUAL records, and maintain service order records.

The features covered in this section include:

- Text File Import
- Back Office Import
- Field Service Utility
- Fix Binary Utility

Text File Import

Use the Text File Import feature to import text records into CRM. The Import utility allows you to save and apply field maps (user-defined settings that allow your data to be placed within the correct data fields) for records of the same arrangement so you can import multiple files quickly.

Import text files into the following features: Accounts, Addresses, Contacts, Tasks, and Opportunities.

Importing Text Using the Text Import Utility

You can import two types of text files using the Text Import Utility: .txt, and .csv.

1. Expand the Admin module in the navigation bar by clicking on the **+** button beside Admin.
2. Expand the Utilities module in the navigation bar by clicking on the **+** button beside Utilities, then click the **Text File Import** button.
3. Click the drop-down list beside the Delimiter field to select how the data in the file is separated. For example, you may have a text file that has data for an account which contains fields that are separated by commas (Karen, Fields, 11 State Street, Hampton, NH, 03850). For this file, you want to choose the comma option in the Delimiter field.

   You can choose from three types of delimiters: comma, semicolon, or Tab.
4. Enter the path and file name of the file you want to import, or click the **Open** button beside the Filename field to select a .txt or .csv file to import.

   The information in the text or csv file is entered in the table and separated into columns based on the delimiter you chose.
5. Click the drop-down list beside the Import To field to choose what feature you want your data to be added.

   You can choose from **Account**, **Address**, **Contact**, **Task**, or **Opportunity**.
6. If you created a field map that already defines the column titles for each column of data, you can click the **Load Field** Map button to apply those column titles to the present text file.

   In the Select an Import Field Map File dialog, find the field map you want to apply then click **Open**.

7 To manually apply column titles to each column of data, click the column header cells (these are the cells that are colored in yellow when the text is imported). A drop-down arrow is displayed in the cell. Select the column title that best describes the data in the column.

   Depending on the selection you made in the Import To field, your column options may differ. Column options include all columns that appear in the customize columns dialog for the specified feature.

   If you have data that does not fit into any of the columns CRM offers, you can select the **Ignore** option. The data in the Ignore option does not import into CRM.

8 You can edit data in the table before importing the information into the database by clicking the appropriate cell and entering the correct information.

9 Click the **Import** button.

10 In the dialog, click **OK** to continue with the import, or **Cancel** to cancel the import process and return to the Text Import Utility.

11 In the dialog, click **OK** to return to the Text Import Utility.

12 If you want to save the field map (the columns you assigned for the data you imported) for importing future text or csv files, click **Save Field Map**.

   In the Save Import Field Map dialog, select where you want to save the field map, specify the field map in the File Name field, then click **Save** to save your field map.

13 To view the records you imported, open the feature to which you imported your text.

Back Office Import

Use the Back Office Import feature to import VISUAL records into the CRM database during implementation of CRM.

The Back Office Import feature is designed for importing VISUAL records during CRM setup so that your existing VISUAL records can be linked with CRM.

The Data Import Utility is setup to populate Accounts with existing customer, contacts with existing alternate contacts, addresses with existing shipping addresses, and employees with employees.

The System Warning dialog opens when you access the Back Office Import feature. The dialog indicates that this feature should only be processed during implementation. If you are implementing CRM and need to setup and link VISUAL record with CRM record, click the **Yes** button. If you are not implementing CRM, click the **No** button to return to CRM.

Importing Back Office Files

You can import two types of text files using the Text Import Utility: txt, and csv.

1 Expand the Admin module in the navigation bar by clicking on the **+** button beside Admin.

2 Expand the Utilities module in the navigation bar by clicking on the **+** button beside Utilities, then click the **Back Office Import** button.

VISUAL files do not contain Division, Business Unit, and Branch fields, so the files you import will not have these fields defined.

3 Click **Begin** to import VISUAL records into CRM.

All VISUAL records are now linked with CRM.

4 Click **Exit** to exit the Data Import Utility.

Field Service Utility

The Field Service Utility provides the Verify and Fix Structure routine and the Recalculate Amounts routine. These routines verify that service order records exist in the VISUAL work order structure, and calculate and roll up estimated and actual amounts from the Service Order Details screens into the Service Order Header.

Verify and Fix Structure

The Verify and Fix Structure routine verifies that each CRM service order exists in the VISUAL work order structure.

This routine completes the following tasks:

- Checks and fixes the integrity of the DB relationship between the CRM Table V_SRVC_ORDER and the VM WORK_ORDER table.
- Checks and fixes the integrity of the DB relationship between the CRM Table V_SRVCORD_OPER and the VM OPERATION table.
- Checks and fixes the integrity of the DB relationship between the CRM Table V_SRVCORD_MTL and the VM REQUIREMENTS table.

You only need to run this routine when multiple service orders are found to have missing VISUAL work orders. If a single service order is missing a work order, you can simply go into the appropriate service order detail screen and click **Save**. After saving the service order in CRM, the missing work order components will automatically be refreshed/created.

1 Expand the Admin module in the navigation bar by clicking on the **+** button beside Admin.

2 Expand the Utilities module in the navigation bar by clicking on the **+** button beside Utilities, then click the **Field Service Utility** button.

3 Select the **Verify and Fix Structure** check box.

Note: You can also select the **Recalculate Amounts** check box to run the Recalculate Amounts routine and the Verify and Fix Structure routine at the same time. See the Recalculate Amounts section for more information.

4 Click **Begin** to start the routine or click **Cancel** to close the Service Order Utility window without running the routine.

Recalculate Amounts

The Recalculate Amounts routine calculates and rolls up estimated and actual amounts from the Service Order Detail screens into the Service Order header.

This routine completes the following tasks:

- Calculates and updates total actual labor hours into the Service Operation from the Labor Transaction.
- Calculates and updates the Actual Start Date and Actual End Date into the Service Operation from the Labor Transaction
- Calculates and updates the Estimated and Actual Labor, Material and Expense amounts into the Service Order header from its children.

You only need to run this routine when multiple service orders are found to have incorrect values. If a single service order is found to be incorrect, you can simply go into the appropriate Service Order detail screen and click **Save**. After saving the Service Order in CRM, the incorrect Service Order values will be recalculated.

1 Expand the Admin module in the navigation bar by clicking on the **+** button beside Admin.

2 Expand the Utilities module in the navigation bar by clicking on the **+** button beside Utilities, then click the **Field Service Utility** button.

3 Select the **Recalculate Amounts** check box.

Note: You can also select the ***Verify and Fix Structure*** check box to run the Verify and Fix Structure routine and the Recalculate Amounts routine at the same time. See the Verify and Fix Structure section for more information.

4 Click **Begin** to start the routine or click **Cancel** to close the Service Order Utility window without running the routine.

Fix Binary Utility

If you have converted your CRM database from SQLBase to another database platform, you may find that extra null characters have been inserted in binary fields such as specifications or notations. To remove these extra characters, run the Fix Binary Utility.

Note: Only the SYSADM user has access to the Fix Binary Utility.

1 Expand the Admin module in the navigation bar by clicking on the **+** button beside Admin.

2 Expand the Utilities module in the navigation bar by clicking on the **+** button beside Utilities, then click the **Fix Binary Utility** button.

3 In the System Warning dialog, click **Yes** to continue.

4 Click the drop-down button to select a specific type of binary field that you would like the system to examine for extra null characters. Select All if you would like the system to examine all binary fields.

5 Click **Begin**. The system indicates when it has finished removing null characters.

6 To review all the changes that the Fix Binary Utility made, consult the log file located in the file path specified in the utility window. The log file shows the original binary field information and the new binary field information.

Chapter 14: Back Office

This chapter includes:

Topic

About Back Office

The Back Office module allows you to access VISUAL and Financials windows. Use the Back Office module to assist in customer inquiry and to view additional information when creating opportunities, quotes, contracts, and service orders.

Using the Parts Feature

The Parts option allows you to view parts from the VISUAL database. Use the Parts grid to assist in customer inquiries and for additional information when creating opportunities, quotes, contracts, and service orders.

A part can either be a raw material or other purchased components necessary in the manufacturing process, or goods produced during the manufacturing process. A part can be either a finished piece or an intermediate assembly used in another process.

Accessing the Parts Grid

Expand the Back Office in the navigation bar by clicking the **+** sign, then click the **Parts** button.

The Parts grid lists basic information about each part. You can change the way you view information in this grid by using the filter options. See “CRM Grids” on page 3-22.

You can also customize your columns by either supplying additional part information or deleting information on your Parts grid by selecting **View > Columns > Customize** from the main menu.

To view the Parts Browser for a specific part, refer to “Viewing Information in the Part Details Window”. To access option bar options, refer to “Accessing Options on the Options Bar”. For site-level part information select fields that start with "Part Site:" as column headers and set preferences accordingly, refer to “Entering Information in the Part Tab” on page 13–15.

For part information and definitions, refer to your Infor VISUAL User’s manual.

Viewing Information in the Part Details Window

The Part Details window allows you to view part history from quantity breaks, order and purchase history, inventory, back orders, and delivery information. You can also substitute parts using the Substitute field on the Stock tab.

This window is available from the Quote Line Items pane and the Part ID button. You can add price break quantities to a selected quote line item from the Parts Browser. See “Adding and Assigning Price Break Quantities” on page 7-29.

You have the option to customize most columns in the Part Details window. For more information on customizing columns, refer to “Customizing Columns,” on page 3–31.

1 Select the Part you want to view from the Parts window, then click the **Toggle** button.

You can also select the part and double-click the row header.

The Part Details window contains quantity break (Retail, Wholesale, User Quantity, and User Price), customer order history for the selected part, and purchase history information for the selected part, as well as inventory, back orders, delivery and substitute part information.

The unit price of the part, product code and commodity code are supplied in the Part Details window.

2 If you use multiple sites, click the **Site ID** arrow and select the site that contains the part you want to view. You can select from any of your allowable sites.

3 To view information for a part other than the part selected in the Parts grid, click the **Browse** button beside the Part ID field and select a part from the list. The Part ID browse is filtered by the selected Site ID.

The information in the Part Details window applies to the site and part selected.

4 The Price Breaks section includes prices breaks for the selected account.

To view price breaks for a different customer, click the **Browse** button beside the Customer field and select a customer from the list.

5 The Order History section includes all orders from all warehouses for the selected part.

You can view orders for the selected part from a specific warehouse by clicking the **Browse** button beside the Warehouse field, then selecting a warehouse from the list.

The Gross Percentage column (**GP%**) is determined from the actual sales price and the inventory transaction table that provides the actual cost for a given transaction.

6 To access the VISUAL Order Inquiry and Invoice windows, select the order history line item you want to view in the Parts Browser window, then right-click your mouse and select either the **Order Inquiry Window** or the **Invoice Window** from the menu.

7 If an order contained multiple shipments, select the **Expand Multiple Shipments** check box to view additional shipments.

8 To view shipments from only the customer displayed in the Customer field, select the **Specified Customer Only** check box.

9 The Purchase History section includes all customers from all warehouses that purchased the selected part.

To view purchase history from a specific warehouse, click the **Browse** button beside the Warehouse field and select the warehouse from the list.

10 Select the **Expand Multiple Receipts** check box to view additional receipt items if the customer received multiple shipments for an order.

11 To access the VISUAL Purchase Order Entry and Invoice Entry windows, select the purchase order line item in the Parts Browser window, then right-click your mouse and select either **Purchase Order Entry** or **AP Window** (Invoice Entry window) from the menu.

12 Click the **Stock** tab.

The Stock tab contains four parts: General Information, Part Inventory, Back Orders, and Delivery. Each part is described in the steps below.

The user defined fields for the part are supplied in the Stock tab.

13 The Substitute field allows you to replace the selected part with a substitute part. The Up-sell box allows you to view suggested up-sell parts.

14 View part inventory for the part from each warehouse in the Inventory section.

15 View back order information for the part from all warehouses in the Back Orders section.

To view back orders from a specific warehouse, click the **Browse** button and select the warehouse from the list.

16 View delivery information for the part from the Delivery section.

To view delivery information from a specific warehouse, click the **Browse** button and select the warehouse from the list.

17 To return to the Quote and Quote Line Items panes, click the **Close** button.

Selecting Substitute Parts

1 With the line item selected, click the **Toggle** button or double-click the selected row header.

2 Click the **Stock** tab.

3 Click the **Substitute** drop-down list to select a substitute part.

Substitute parts must be added in VISUAL.

Click the **Switch** button to replace the selected part with the substitute part.

4 Select the **Sales** tab.

5 Enter the number of parts you want to order in the User Qty cell under the **Units** column.

6 Enter the price per part in the User Price cell under the **Units** column.

7 If you want to establish quantity discounts for this part, specify the quantity and price per each quantity ordered.

The column headers reflect the quantity breaks you assigned to parts in VISUAL. This is meant to be used as a guide.

8 Click the **Close** button to exit the Part Details window.

The part is replaced with the substitute part for the selected line item.

Accessing Options on the Options Bar

The option bar at the top of the Parts grid allows you to view records associated with the selected part. The parts option bar includes **Quote Lines**, **Order Lines**, and **Estimate Lines**.

Quote Lines

Select the part that contains the quote line items you want to view, then click the **Quote Lines** option button on the Options bar.

The Quote Lines for Part window lists basic information about quotes that include the part you selected.

You can access the Account and Quote ID details by clicking on the appropriate name or ID.

Order Lines

Select the part that contains the order line items you want to view, then click the **Order Lines** option button on the Option bar.

The Order Lines for Part window lists basic information all orders that have purchased the selected part.

Access details for the account and Customer Order for the selected part by clicking on the account name or Customer Order ID.

Estimate Lines

Select the part that contains the estimate line items you want to view, then click the **Estimate Lines** option button on the Option bar.

The Estimate Lines for Part window lists basic information on all estimates that contain the selected part.

Access details for a specified Account or Customer Order by clicking on the account name or Customer ID.

Printing and Exporting Parts Information

Several options to print and export Parts information are provided in CRM. Refer to the following chapters for additional information:

- To print a report on all Part records in the Parts grid, refer to “Printing All Records in a Grid,” on page 4–22.
- To print preloaded and user-defined reports, refer to “Using the Reports Menu Option,” on page 4–24.
- To export the Parts grid or a specific record within the Parts grid and save it in a specified format, refer to “Exporting Grid Contents,” on page 3–25.

Using the RMAs Feature

The **RMAs** button allows you to view Return Material Authorization entries within CRM, and maintain RMAs from the VISUAL database. You can access Line Items for each RMA using the Line Items for RMA window.

A Return Material Authorization (RMA) is a document that controls the return of some part or parts previously sold and shipped to a customer.

Accessing the RMAs Grid

1 In the navigation bar, click the **+** button beside Back Office.

2 Click the **RMAs** button.

The RMAs grid lists basic information about each RMA entry.

You can customize columns in the RMAs grid by selecting **View > Columns > Customize** from the main menu or right-click your mouse within the pane and select **Columns > Customize**. See “Customizing Columns” on page 3-31.

3 Under the **Account Name** column, click an account name to view account details in the bottom pane.

4 In the **Org Cust Order** column, click an order number to open the Customer Order Entry window.

Adding RMAs

1 Click the **New** toolbar button, or right-click in the RMAs grid and select **New Record** from the main menu.

Refer to your *Infor VISUAL Sales User’s Guide* for specific instructions on entering RMAs.

2 Select **File**, **Exit** from the main menu to exit VISUAL and return to CRM.

3 To view the RMAs you created, click the **Refresh** toolbar button in CRM.

Editing RMAs

Edit RMAs through VISUAL.

1 From the RMAs grid, select the RMA that you want to edit, then click the **Toggle** button.

2 Edit the necessary information in the Return Material Authorization window.

Refer to your *Infor VISUAL User’s Guide* for information on working in the Return Material Authorization window.

3 Click the **Save** toolbar button when you are finished editing.

4 To return to the RMAs grid in CRM, select **File**, **Exit** from the menu, or click the **x** button located in the top right corner of the window.

Accessing the RMA Lines Grid

The RMA Lines grid allows you to view return quantities for all RMAs. Line items only appear in the RMA Lines grid when a return quantity is entered for an RMA in VISUAL.

1 Click the **+** button beside RMAs.

2 Click the **Line Items** button.

3 In the RMA Lines grid, under the **Account Name** column, click an account name to view account details in the bottom pane.

Viewing Line Items for an RMA

1 In the RMA Lines grid, select the appropriate RMA.

2 On the option bar, click the **Line Items** button.

To customize column layout, right-click your mouse in the “RMA Lines Items For RMA <*RMA number*>” pane and select **Columns > Customize** from the menu. See “Customizing Columns” on page 3-31.

3 Under the **Acct Name** column, click an account name to view more information about that account.

Printing and Exporting RMA Information

Several options to print and export RMA information are provided in CRM. Refer to the following chapters for additional information:

- To print a report on all RMA records in the RMAs grid, see “Printing All Records in a Grid” on page 4-22.
- To print preloaded and user-defined reports, see “Using the Reports Menu Option” on page 4-24.
- To export the RMAs grid or a specific record within the RMAs grid and save it in a specified format, see “Exporting Grid Contents” on page 3-25.

Using the Receivables Feature

The Receivables option allows you to view basic invoice information and perform multiple tasks for CRM customers using the VISUAL and VISUAL Financials database. The five options within the Receivables feature allows you to identify if customers are awaiting shipment of an ordered product, to acknowledging receipt of payment or returned goods. The Receivables feature also allows you to perform multiple functions from creating an invoice for a customer in VISUAL, to initiating a collection payment plan in VISUAL Financials.

The Receivables feature contains nine different options: **Receivables**, **Line Items**, **Invoice Entry**, **Collections Window**, **Cash Application**, **Invoice Forms**, **Receivable Inquiry**, **Progress Billing Entry**, and **Customer Maintenance**.

The **Receivables** option lists all invoices for CRM customers. The **Line Items** option lists each line within an invoice. The **Invoice Entry** feature opens the Invoice Entry window which allows you to view and specify invoices in VISUAL Financials. The **Collections Window** option allows you to maintain collections in the VISUAL Financials Collections window. The **Cash Application** feature opens the Cash Application window in VISUAL Financials, the **Invoice Forms** feature opens the Invoice Forms window in VISUAL allowing you to create A/R Invoices from Customer Orders, the **Receivable Inquiry** option allows you to view invoices in the Receivable Inquiry window of VISUAL Financials, the **Progress Billing Entry** feature allows you to setup a billing plan for customers before products and/or services are available for delivery in VISUAL, and the **Customer Maintenance** feature allows you to maintain customers in the Customer Maintenance window of VISUAL.

Accessing the Receivables Grid

In the navigation bar, click the **+** button beside Back Office.

Click the **Receivables** button.

The Receivables grid lists basic information about each invoice. You can change the way you view information on this grid by using the filter options. See “Using Filters in Grids” on page 3-25.

You can also customize your column in the Receivables grid by selecting **View > Columns > Customize** from the main menu. See “Customizing Columns” on page 3-31.

For more information on receivables, see your *Infor VISUAL Financials Receivables User’s Guide*.

Accessing the Line Items Grid

The Line Items grid lists all line items of invoices assigned to CRM customers.

1 In the navigation bar, click the **+** button beside Back Office.

2 Click the **+** button beside the Receivables feature.

3 Click the **Line Items** button.

4 To view account details, click the Account Name.

Accessing the Receivables Windows

The remaining Receivables windows, Invoice Entry, Collections Window, Cash Application, Invoice Forms, Progress Billing Entry, Receivable Inquiry, Customer Maintenance are accessed from VISUAL and VISUAL Financials. The procedures for accessing each of the windows is the same with exception to the name of the window.

1 Expand the Back Office module in the navigation bar by clicking the **+** button (or double-click on the Back Office module), then click the **+** button beside the Receivables feature.

2 Click the window you want to access.

3 Enter the necessary information in the window.

Refer to your Infor VISUAL or *Infor VISUAL Financials User's Guide* for more information.

4 To return to CRM, select **File**, **Exit** from the main menu, or click the **x** button located in the top right corner of the window.

A brief description of each window is described below. See your Infor VISUAL or *Infor VISUAL Financials User's Guide*.

Invoice Entry – The Invoice Entry option opens the Financials Invoice Entry window. Maintain invoices from the Invoice Entry window.

Collections Window – The Collections Window feature opens the Financials Collections window. Maintain collections for customer accounts in the Collections window.

Cash Application – The Cash Application feature opens the Financials Cash Application window. Maintain cash application procedures in the Cash Application window.

Invoice Forms – The Invoice Forms feature opens the VISUAL Invoice Forms window. Use the Invoice Forms window to print invoices for shipped customer orders.

Receivable Inquiry – The Receivable Inquiry feature opens the Financials Receivable Inquiry window. Use the Receivable Inquiry window to view CRM customer invoices.

Progress Billing Entry – The Progress Billing Entry feature opens the VISUAL Progress Billing Entry window. Maintain customer billing plans for products and/or services before they are available for shipment in the Progress Billing window.

Customer Maintenance – The Customer Maintenance feature opens the VISUAL Customer Maintenance window. Maintain customers in the Customer Maintenance window.

Accessing Progress Billing Entry

The Progress Billing Entry feature opens the VISUAL Progress Billing Entry window. Maintain customer billing plans for products and/or services before they are available for shipment in the Progress Billing window.

Expand the Back Office module in the navigation bar by clicking on the **+** button beside Back Office, then click the **+** button beside the Receivables feature.

Accessing Receivable Inquiry

The Receivable Inquiry feature opens the Financials Receivable Inquiry window. Use the Receivable Inquiry window to view CRM customer invoices.

1 Expand the Back Office module in the navigation bar by clicking on the **+** button beside Back Office, then click the **+** button beside the Receivables feature.

2 Click the **Receivables Inquiry** button.

3 Enter the necessary information in the Receivables Inquiry window.

Refer to your *Infor VISUAL Financials User's Guide* when working with the Receivables Inquiry window.

4 To return to CRM, select **File**, **Exit** from the main menu, or click the **x** button located in the top right corner of the window.

Accessing Customer Maintenance

The Customer Maintenance feature opens the VISUAL Customer Maintenance window. Maintain customers in the Customer Maintenance window.

1 Expand the Back Office module in the navigation bar by clicking on the **+** button beside Back Office, then click the **+** button beside the Receivables feature.

2 Click the **Customer Maintenance** button to open the Customer Maintenance window.

3 Enter the necessary information in the Customer Maintenance window.

Refer to your *Infor VISUAL User's Guide* for more information on maintaining customers in the Customer Maintenance window.

4 To return to CRM, select **File**, **Exit** from the main menu, or click the **x** button located at the top right corner of the window.

Viewing Line Items for a Receivable

1 In the Receivables grid, select the appropriate receivable.

2 On the option bar, click the **Line Items** button.

Note: To customize column layout, right-click your mouse in the "Receivable Lines for Receivable <receivable number>" pane and select **Columns > Customize** from the menu. *See "Customizing Columns" on page 3-31.*

3 Under the **Acct Name** column, click an account name to view more information about that account.

Printing and Exporting Receivable Information

Several options to print and export Receivable information are provided in CRM. Refer to the following chapters for additional information:

- To print a report on all Receivable records in the Receivables grid, refer to “Printing All Records in a Grid,” on page 4–22.
- To print preloaded and user-defined reports, refer to “Using the Reports Menu Option,” on page 4–24.
- To export the Receivables grid or a specific record within the Receivables grid and save it in a specified format, refer to “Exporting Grid Contents,” on page 3–25.

Using the Purchase Orders Feature

The Purchase Orders option allows you to view basic purchase order information and perform multiple tasks for CRM customers using the VISUAL database.

Accessing the Purchase Orders Grid

Expand the Back Office module in the navigation bar by clicking on the **+** button beside Back Office, then click the **Purchase Orders** button.

The Purchase Orders grid lists basic information about each purchase order. You can change the way you view information on this grid by using the filter options. See “Using Filters in Grids” on page 3-25.

You can also customize your column in the Purchase Orders grid by selecting **View > Columns > Customize** from the main menu. See “Customizing Columns” on page 3-31.

For more information on purchase orders, refer to your *Infor VISUAL Purchasing User’s Guide*.

Accessing the Line Items Grid

1 To view line items for all purchase orders, click the **+** button beside the Purchase Orders feature on the navigation bar, then click the **Line Items** button.

2 To launch the Part Browser, click an item in the Part ID column.

3 To view purchase order details, select the appropriate purchase, then click the **Toggle** button at the upper left side of the Purchase Orders grid. You can also double-click the selected Purchase Order.

Viewing Line Items for a Purchase Order

1 In the Purchase Orders grid, select the appropriate order.

2 On the option bar, click the **Line Items** button.

Note: To customize column layout, right-click your mouse in the “Purchase Order Lines for Purchase Order” pane and select **Columns > Customize** from the menu. *See “Customizing Columns” on page 3-31.*

3 Under the **Part ID** column, click a Part ID to open the Part ID Window.

Accessing the Purchase Order Entry Window

Expand the Back Office Module in the navigation bar by clicking the **+** button (or double-click on the Back Office module), then click the Purchase Orders feature.

With the appropriate purchase order selected, click the **Toggle** button at the upper left side of the Purchase Orders grid. You can also double-click the selected Purchase Order.

Refer to your *Infor VISUAL Purchasing User's Guide* for more information.

Printing and Exporting Purchase Order Information

There are several options to print and export Purchase Order information in CRM. Refer to the following chapters for additional information:

- To print a report on all Purchase Order records in the Purchase Orders grid, refer to "Printing All Records in a Grid," on page 4–22.
- To print preloaded and user-defined reports, refer to "Using the Reports Menu Option," on page 4–24.
- To export the Purchase Orders grid or a specific record within the Purchase Orders grid and save it in a specified format, refer to "Exporting Grid Contents," on page 3–25.

Using the Sales Feature

The Sales option allows you to view, maintain, or print records that involve Sales such as customer orders, sales commissions, shipping, billing entry, and printing customer, shipping, commission and revenue reports.

The Sales feature contains the following options: **Customer Order Entry**, **Estimating Window**, **Order Management**, **RMA**, **Shipping Entry**, **Customer Inquiry**, **Customer Maintenance**, **Sales Tax Group Maintenance**, **Invoice Forms**, **Customer Backlog Report**, **Customer Bookings Report**, **Customer Sales Journal**, **Revenue Report**, **Sales Commission Report**, **Shipping/ Delivery Report**, and **Progress Billing Entry**.

Accessing the Sales Windows

The Sales windows are accessed from VISUAL. The procedures for accessing each of the windows is the same with exception to the name of the window.

1 Expand the Back Office module in the navigation bar by clicking the **+** button (or double-click on the Back Office module), then click the **+** button beside the Sales feature.

2 Click the window you want to access.

3 Enter the necessary information in the window.

Refer to your *Infor VISUAL Sales User's Guide* for more information.

4 To return to CRM, select **File**, **Exit** from the main menu, or click the **x** button located in the top right corner of the window.

A brief description of each window is described below.

Customer Order Entry – Create and maintain customer orders in the Customer Order Entry window of VISUAL.

Estimating Window – Use the Estimating window to create and maintain quotations to present and prospective customers.

Order Management Window – The Order Management features opens the Order Management window. Order Management is a serial number-controlled module designed to work with DCMS. As well as containing all the functionality of the basic Customer Order Entry window, the Order Management Window features four child windows that let you view part availability, customer order history, available WIP/VAS, and shipping information.

Return Material Authorization – The RMA feature opens the Return Material Authorization window. Create and maintain RMA entries for customers in the Return Material Authorization window.

A Return Material Authorization (RMA) is a document that controls the return of some part or parts previously sold and shipped to a customer.

Shipping Entry – The Shipping Entry feature opens the Shipping Entry window. Shipping Entry allows shipping and receiving personnel to ship customer orders and process returns.

Customer Inquiry – The Customer Inquiry feature opens the Customer Inquiry window. Use the Customer Inquiry window to view different types of database information about your customer orders. You can view Order IDs, Customer Part IDs, Invoice IDs, Quote IDs, and others.

Customer Maintenance – The Customer Maintenance feature opens the Customer Maintenance window. Use the Customer Maintenance window to specify and maintain customers in your customer database.

Sales Tax Group Maintenance – The Sales Tax Group Maintenance feature opens the Tax Group Maintenance window. Use the Tax Group Maintenance window to create, edit, and delete sales tax group and sales tax information. This is the tax information used in the Customer Order Entry window.

Invoice Forms – The Invoice Forms feature is only useful to you if you are using A/R Invoicing.

The Invoice Forms feature opens the Invoice Forms window. Use the Invoice Forms window to print invoices for shipped customer orders.

Customer Backlog Report – The Customer Backlog Report feature is only useful to you if you are using A/R Invoicing.

The Print Customer Backlog Report feature allows you to print information on all partially or totally unshipped orders, including those with a status of Firm, Released, or On Hold.

Customer Bookings Report – The Customer Bookings Report feature is only useful to you if you are using A/R Invoicing.

The Customer Bookings Report feature allows you to print information for all Firm, Released, and Closed customer orders in a specified date range.

Customer Sales Journal – The Customer Sales Journal feature is useful if you are using A/R Invoicing.

This report is actually two reports that you can print together. The detailed report is essentially the same format as the Customer Bookings Report, but shows invoiced amounts instead of order amounts. The report only shows shipped orders; order that are shipped but currently uninvoiced appear with an amount of zero. The summary report summarizes invoiced amount totals for each separate Tax Group ID and each G/L Revenue Account ID.

Revenue Report – The Revenue Report feature is useful if you are using A/R Invoicing.

Revenue Reports contain the dollar value of all customer orders shipped within each month.

Sales Commission Report – The Sales Commission Report feature is useful if you are using A/R Invoicing.

There are three Sales Commission Reports available from the Print Customer Order Commissions Reports window.

The Commissions Report prints commissions information for all Firm, Released, and Closed Customer orders in a specified date range.

The Commissions Distribution report details the breakdown of projected commissions for each Sales Rep or order.

The Commissions Actuals Report shows actual commissions for each sales rep based on shipped orders.

Shipping/Delivery Report – The Shipping/Delivery Report feature opens the Shipping/Delivery Report window. Use the Shipping/Delivery Report window to print information on all firm and released customer orders in VISUAL.

Progress Billing Entry – The Progress Billing Entry feature opens the Progress Billing Entry window. Use the Progress Billing Entry window to specify how and when invoices are generated for a specific customer.

Using the Inventory Feature

The Inventory feature allows you to create and maintain all your inventory in your company's database. You can create and maintain parts, warehouses and warehouse information, IBTs, schedule planning, and part traceability.

The Inventory feature in the Back Office includes the following features: **Inventory Transaction Entry**, **Material Planning Window**, **Physical Inventory Count**, **Part Maintenance**, **Unit of Measure Maintenance**, **Warehouse Maintenance**, **Inter Branch Xfer Entry**, **Inter Branch Xfer Receipts Entry**, **Inter Branch Xfer Shipping Entry**, **Part Trace Maintenance**, **Part Trace Profile Maintenance**, and **Inventory Valuation Report**.

Accessing the Inventory Windows

The 12 Inventory windows are accessed from VISUAL. The procedures for accessing each of the windows is the same with exception to the name of the window.

1. Expand the Back Office module in the navigation bar by clicking the **+** button (or double-click on the Back Office module), then click the **+** button beside the Inventory feature.
2. Click the window you want to access.
3. Enter the necessary information in the window.

   Refer to your *Infor VISUAL Inventory User's Guide* for more information.
4. To return to CRM, select **File**, **Exit** from the main menu, or click the **x** button located in the top right corner of the window.

A brief description of each window is described below.

Inventory Transaction Entry – Use the Inventory Transaction Entry window to issue and return materials to work orders, receive and return finished goods from work in process, adjust inventory on-hand quantities to reconcile with actual physical quantities, view inventory transactions, and transfer inventory between part locations.

Material Planning Window – Use the Material Planning feature to plan material supply to meet expected demands.

Physical Inventory Count – Use the Physical Inventory Count feature to manage the process of periodic counts of inventoried parts and resulting reconciliations.

Part Maintenance – Use the Part Maintenance feature to add, delete, and edit part information for all your parts in VISUAL.

Unit of Measure Maintenance – Use the Unit of Measure Maintenance feature to define and maintain the different units used in VISUAL to specify material quantities.

Warehouse Maintenance – Use the Warehouse Maintenance feature to create, edit, and delete warehouse and warehouse location information.

Inter Branch Xfer Entry – Use the Inter Branch Xfer Entry to move inventory from one warehouse transit location to another warehouse location. Use Interbranch Transfer Entry to produce thorough shipping documentation.

Inter Branch Xfer Receipts Entry – Use the Inter Branch Xfer Receipts Entry feature to receive the shipped IBT (Inter Branch Transfer) quantities.

Inter Branch Xfer Shipping Entry – Use the Inter Branch Xfer Shipping Entry feature to ship the Interbranch Transfer (IBT).

Part Trace Maintenance – Part Traceability is an optional VISUAL module that lets you track purchased or fabricated materials by lot, serial number, or other identifier.

Use Part Trace Maintenance to manage assignment of lot numbers, and to report, maintain, and print traceability records.

Part Trace Profile Maintenance – Use the Part Trace Profile Maintenance feature to describe how you want traceability to work for a part.

Inventory Valuation Report – Use the Inventory Valuation Report feature to keep track of the inventory activities of your enterprise. This report provides a breakdown and total value for all parts in your inventory.

Using the Purchasing Feature

Use the Purchasing feature to create and maintain purchasing in your company's database.

The Purchasing feature contains the following options: **Purchase Order Entry**, **Purchase Receipt Entry**, **Vendor RFQ Entry**, **Vendor Inquiry**, **Outside Service Entry**, **Vendor Maintenance**, **Receiving Report**, **Outside Service Dispatch Entry**, **Outside Service Planning Window**, **Outside Service Receipt Entry**.

Accessing the Purchasing Windows

The ten Purchasing windows are accessed from VISUAL. The procedures for accessing each of the windows is the same with exception to the name of the window.

1 Expand the Back Office module in the navigation bar by clicking the **+** button (or double-click on the Back Office module), then click the **+** button beside the Purchasing feature.

2 Click the window you want to access.

3 Enter the necessary information in the window.

Refer to your *Infor VISUAL Purchasing User's Guide* for more information.

4 To return to CRM, select **File**, **Exit** from the main menu, or click the **x** button located in the top right corner of the window.

A brief description of each window is described below.

Purchase Order Entry – Use the Purchase Order Entry option to create and maintain purchase orders for both inventory and non-inventory parts, as well as for subcontracted services.

Purchase Receipt Entry – Use the Purchase Receipt Entry option to receive and return purchased materials.

Vendor RFQ Entry – Use the Vendor RFQ Entry option to request, obtain, and record quotations on parts you need to fulfill a customer order.

Vendor Inquiry – Use the Vendor RFQ Entry option to request, obtain, and record quotations on parts you need to fulfill a customer order.

Outside Service Entry – Use the Outside Service Entry option to specify master specification and cost information for outside services.

Vendor Maintenance – Use the Vendor Maintenance option to specify and maintain the vendor database.

Receiving Report – The Receiving Report provides information on all firm and released purchase orders.

Outside Service Dispatch Entry – Use the Outside Service Dispatch Entry option to record information for parts that are sent to outside service vendors.

Outside Service Planning Window – Use the Outside Service Planning Window option to track parts sent to and from outside service vendors.

Outside Service Receipt Entry – Use the Outside Service Receipt Entry to log shipments of in-process material to and from subcontractors.

Using the Scheduling Feature

Use the Scheduling feature to plan different events involved in the manufacturing process. These VISUAL features are used in CRM to complete scheduling tasks: **Concurrent Scheduler**, the **Scheduling window**, **Throughput window**, the **Production Schedule Report**, **Utilization Percentages**, and **Resource Delay**.

Accessing the Scheduling Windows

The six Receivables windows are accessed from VISUAL. The procedures for accessing each of the windows is the same with exception to the name of the window.

1 Expand the Back Office module in the navigation bar by clicking the **+** button (or double-click on the Back Office module), then click the **+** button beside the Scheduling feature.

2 Click the window you want to access.

3 Enter the necessary information in the window.

Refer to your *Infor VISUAL Manufacturing User's Guide* for more information.

4 To return to CRM, select **File**, **Exit** from the main menu, or click the **x** button located in the top right corner of the window.

A brief description of each window is described below.

Concurrent Scheduler – Use the Concurrent Scheduler option to create a schedule or multiple schedules for your shop.

Scheduling Window – Use the Scheduling Window option to properly schedule your manufacturing activities.

Throughput Window – Common Sense Throughput is a strategy for using information from VISUAL to increase your company's profit. Use the Throughput Window to implement this strategy.

Production Schedule Report – The Production Schedule reports help the production manager and supervisor manage and analyze the shop. All six reports are available from the Print Production Schedule Reports window: Dispatch, Work Order Status, Foreman's Report, Shop Calendar, Efficiency/Utilization, Shopping Performance, and Shop Floor Status reports.

Utilization Percentages – Utilization reports show a percentage value for scheduled load versus actual capacity for shop resources over a fourteen day period. You can print utilization percentage reports and view graphs using the Utilization Percentages window.

Resource Delay – Resource Delay reports show the total amount of delay in days from scheduled operations for shop resources over a variable period. Use the Resource Delay window to print these reports.

Using the Eng/Mfg Feature

Use the Eng/Mfg feature to access VISUAL windows in the Eng/Mfg menu option of VISUAL. Create, print, and maintain engineering and manufacturing records using the options in the Eng/Mfg feature.

The Eng/Mfg feature includes the following options: **Estimating Window**, **Labor Ticket Entry**, **Manufacturing Window**, **Outside Service Dispatch Entry**, **Outside Service Planning Window**, **Outside Service Receipt Entry**, **Outside Service Maintenance**, **Shop Resource Maintenance**, **Quality Maintenance**, **Costing Utilities**, **Test Definition**, **Work Order/Operation Input**, **List of Tests**, **Capability Report**, **Work Order Traveller**, **Bill of Material Report**, **Engineering Report**, **Gross Profit Report**, **Production Schedule Report**, **Work in Process Report, Work Order/Master Cost Report**, **Work Order Requirement Report**.

Accessing the Eng/Mfg Windows

The 23 Eng/Mfg windows are accessed from VISUAL. The procedures for accessing each of the windows is the same with exception to the name of the window.

1 Expand the Back Office module in the navigation bar by clicking the **+** button (or double-click on the Back Office module), then click the **+** button beside the Eng/Mfg feature.

2 Click the window you want to access.

3 Enter the necessary information in the window.

4 To return to CRM, select **File**, **Exit** from the main menu, or click the **x** button located in the top right corner of the window.

A brief description of each window is described below. See your *Infor VISUAL Manufacturing User's Guide*.

Estimating Window – Use the Estimating Window option to create and maintain quotations to present to prospective customers of your company.

Labor Ticket Entry – Use the Labor Ticket Entry option to record labor transactions.

Manufacturing Window – The Manufacturing Window option provides master process definition, work order creation, and the seamless integration of scheduling, material planning, purchasing, and order management you need to manufacture products.

Outside Service Dispatch Entry – Use the Outside Service Dispatch Entry to record information for parts that are sent to outside service vendors.

Outside Service Planning Window – Use the Outside Service Planning Window option to track parts sent to and from outside service vendors.

Outside Service Receipt Entry – Use the Outside Service Receipt Entry to log shipments of in-process material to and from subcontractors.

Outside Service Maintenance – The Outside Service Maintenance function provides a means of entering master specification and cost information for outside services. You need the Service ID you set up here when you specify a subcontractor resource in an operation. Outside Service Maintenance is somewhat analogous to Part Maintenance.

Shop Resource Maintenance – Use the Shop Resource Maintenance option to input and track the resources necessary to the manufacturing process.

Quality Maintenance – Use the Quality Maintenance feature to set global variables such as the minimum subgroup size for XBar/Range tests, or the smallest sub-group allowed before standard deviation can be used instead of range.

You can also use this program to set up parameters for determining whether a process is in statistical control (decision parameters), gage maintenance, defect classification and characteristics for measurement.

Costing Utilities – There are two sections to the Costing Utilities window. The upper portion is used to update costs related to Work Orders and inventory transactions. If you are running VISUAL without VISUAL Financials, you need only to select these two options.

The bottom half of the Costing Utilities window is where you can have the system prepare the manufacturing journals, if you want.

Test Definition – After you have set up the global values in Quality Maintenance, use the Quality Test Definition window to define and edit tests.

Work Order/Operation Input – Use Quality Work Order/Operation Input to assign tests to engineering masters. This allows work orders generated from masters to inherit the tests of the master.

Use the Quality Work Order/Operation Test Input to copy tests from one work order to another work order for the same part. You can also change the sample size and status of a test step using Work Order/Operation Test Input.

List of Tests – Use the List of Tests feature to specify and analyze Quality test data using Quality Data Entry and Analysis.

Capability Report – You can print the results of Quality tests in three different report formats: Work Order, Part, and Test, using the Capability Report feature.

Work Order Traveller – Work Order Travellers are reports that provide two main functions; each is printed as a separate report:

Provide Work Order Paperwork to Shop Operators – This report provides a succinct report of all pertinent work order, customer, and operation information for a work order, and is specifically designed to accompany in-process material as it travels through the shop. Thus, it includes all information needed to manufacture the part, including drawing numbers and revisions, specifications, Part IDs and quantities. Additionally, you can print the work order traveller with barcodes for use with the Barcode Labor Entry application. The Traveller Format portion of the Work Order Traveller provides this function.

Provide Material Requirement Paperwork to Material Handling Personnel – This report provides a material pick list for issuing material to a work order. All pertinent part information is included in the report, including Part ID, unit of measure, specifications, and warehouse locations. Additionally, you can print the pick list with barcodes for Part IDs. The Picklist Format portion of the Work Order Traveller provides this function.

Bill of Material Report – The Bill of Material Report feature provides an indented bill of materials for a range of engineering masters or work orders.

Costed Bill of Material Report – The Costed Bill of Material report is similar to the Bill of Material report, but only prints BOMs for engineering masters, and provides additional cost information.

Engineering Report – The Engineering Report provides a complete printout of an engineering master, work order, or quote.

Gross Profit Report – The Gross Profit Report lists orders shipped in a specified financial period or date range, and shows the following information for each selected packlist shipped: Sales Amount Labor, Material, Burden, Service, and Total Costs Gross Profit =Sales Amount – Total Cost Gross Profit % =100 x Gross Profit / Sales Amount.

Production Schedule Report – The Production Schedule reports help the production manager and supervisor manage and analyze the shop. All six reports are available from the Print Production Schedule Reports window.

Work in Process Report – The Work in Process report prints actual cost information for work in process based on currently accumulated costs for firm and released work orders, or for WIP that has been posted to the general ledger using the Costing Utilities.

Work Order/Master Cost Report – The Work Order/Master Cost report shows estimated costs for engineering and quote masters, and estimated, and projected costs for work orders. Costs are totaled for all operations, all materials, and the whole work order or master.

Work Order Requirement Report – This report summarizes unpurchased or unissued material required by a work order, and is especially useful for managing non-inventory materials.

Using the Ledger Feature

Use the Ledger feature to access VISUAL windows that create, maintain, and/or print VISUAL records associated with the Ledger.

The Ledger feature in the Back Office includes the following features: **Accounting Window, General Journal Entry, Report Writer Window, Costing Utilities, Post Manufacturing Journals, Revaluation Entry, Consolidation Entry, Budget Maintenance, and Currency Exchange Rate Maintenance.**

Accessing the Ledger Windows

The nine Ledger windows are accessed from VISUAL Financials. The procedures for accessing each of the windows is the same with exception to the name of the window.

1 Expand the Back Office module in the navigation bar by clicking the **+** button (or double-click on the Back Office module), then click the **+** button beside the Ledger feature.

2 Click the window you want to access.

3 Enter the necessary information in the window.

4 To return to CRM, select **File > Exit** from the main menu, or click the **x** button located in the top right corner of the window.

A brief description of each window is described below. See your *Infor VISUAL General Ledger User's Guide* for more detail.

Accounting Window – Use the Accounting Window to create your chart of accounts and specify all of your account information.

General Journal Entry – Use General Journal Entry to create journals that post directly to accounts in the General Ledger.

Report Writer Window – The General Ledger Report Writer is an easy to use, powerful tool for developing unique financial reports.

Costing Utilities – There are two sections to the Costing Utilities window. The upper portion is used to update costs related to Work Orders and inventory transactions. If you are running VISUAL without VISUAL Financials, you need only to select these two options.

The bottom half of the Costing Utilities window is where you can have the system prepare the manufacturing journals, if you want.

Post Manufacturing Journals – The Post Manufacturing Journal function allows you to create journals that reflect the costs of the manufacturing process.

Revaluation Entry – Use the Currency Revaluation feature of VISUAL Financials to activate the automatic process of assessing and resetting currency balances.

Consolidation Entry – Consolidation is the process of combining financial information to produce financial statement reports.

The Consolidation Entry window performs two primary functions. The first function allows you to map a subsidiary account structure to the parent organizations account structure, and the second function allows you to generate the consolidation entry to electronically pass to the parent organization.

Budget Maintenance – Use the Budget Maintenance window to create and maintain a budget, or multiple budgets for comparisons and reports.

Currency Exchange Rate Maintenance – Currency Exchange Rate Maintenance allows you to set up multiple databases for tracking the currency of the countries participating in the European Common Community (ECC). Use this feature to track the currency of the specific countries of the customers and vendors that you are trading with in their native currency.

Using the Payables Feature

Use the Payables feature to create and maintain payables in your VISUAL Financials database.

The Payables feature in the Back Office includes the following features: **Invoice Entry**, **Payment Scheduling**, **Payment Entry**, **Generate Sales Commissions**, **Payable Inquiry**, and **Vendor Maintenance**.

Accessing the Payables Windows

The six Payables windows are accessed from Financials. The procedures for accessing each of the windows is the same with exception to the name of the window.

1. Expand the Back Office module in the navigation bar by clicking the **+** button (or double-click on the Back Office module), then click the **+** button beside the Payables feature.
2. Click the window you want to access.
3. Enter the necessary information in the window.
4. To return to CRM, select **File**, **Exit** from the main menu, or click the **x** button located in the top right corner of the window.

A brief description of each window is described below. For more information, see your *Infor VISUAL Financials Payables User's Guide*.

Invoice Entry – Use the Invoice Entry option to create and maintain AP vouchers, generate credit memos, setup and generate recurring payables, create payments, and print informative AP reports.

Payment Scheduling – Use the Payment Scheduling feature to view invoices before payment is made, reschedule payments, change the status of a payment, write payments through the A/R Payment Entry window, and print associated reports in the Payment Scheduling window.

Payment Entry – Use the Payment Entry option to generate payments to the vendor and update the appropriate ledger accounts.

Generate Sales Commissions – Use the Generate Sales Commissions option to generate commissions for sales representatives.

Payable Inquiry – Use the Payable Inquiry option to match-up payments against invoices and to identify possible exchange differences.

Vendor Maintenance – Use the Vendor Maintenance option to specify and maintain the vendor information within your database.

Using the Cash Feature

Use the Cash feature to access Financials Cash menu options. You can organize your actual cash flow, view accounting transactions, and specify and maintain account information for bank accounts using the windows in the Cash feature.

The Cash feature contains the following options: **Cash Book**, **Cash Management Window**, and **Bank Account Maintenance**.

Accessing the Cash Windows

The three Cash windows, Cash Book, Cash Management, and Bank Account Maintenance, are accessed from Financials. The procedures for accessing each of the windows is the same with exception to the name of the window.

1 Expand the Back Office module in the navigation bar by clicking the + button (or double-click on the Back Office module), then click the **+** button beside the Cash feature.

2 Click the window you want to access.

3 Enter the necessary information in the window.

4 Select **File**, **Exit** from the main menu, or click the **x** button located in the top right corner of the window.

A brief description of each window is described below. For more information, see your *Infor VISUAL Financials Cash User's Guide*.

Cash Book – Cash Book is a bank account management tool. Cash Book collects all of the cash transactions from the Accounts Payable Payment Entry feature and the Accounts Receivable Cash Application feature to facilitate your bank reconciliation. Cash Book also allows you to manually specify adjustment transactions to the bank account, such as bank interest, fees, transfers, and automatic deposits and withdrawals.

Use the Cash Book window to view the transactions from Cash Application in Accounts Receivable and Payment Entry in Accounts Payable and to specify manual adjustments to the bank accounts (i.e. interest and fees).

Cash Management Window – The Cash Management Window organizes actual cash flow, predicts cash flow for future periods based on a set of planning assumptions, and provides a forecasting mechanism to build business speculation into the plan.

Bank Account Maintenance – Use Bank Account Maintenance to specify and maintain account information about your bank and ledger accounts relative to receivables and payables.

Using the Quality Feature

Use the Quality feature to access Quality.

Quality is a comprehensive data management and reporting tool that manages supplier, customer and employee information and activities; records and tracks all related supplier and customer information; records and tracks your employees, course studies, skills, job descriptions, projects, audits and audit results; administers documentation to record and track quality systems and manufacturing processes, as well as product data management analysis and FMEA's; manages preventive maintenance and gage calibration processes and documentation including complete inspection data collection and reporting with full statistical processing control capabilities; and records and tracks nonconformances.

Refer to your *Infor VISUAL Quality User's Guide* for more information.

Accessing Quality

1. Expand the Back Office feature within the navigation bar by clicking the **+** button.
2. Click the **Quality** button.
3. In the Login dialog, specify your Database, User ID, and Password if necessary, then click the **Sign In** to continue.

   See your *Infor VISUAL Quality User's Guide* when working in Quality.
4. To return to CRM, select **File**, **Exit** from the main menu, or click the **x** button located at the top right corner of the window.

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