

Universal Client CRM™

Client Relationship Management System

Multi-User Edition

The Sales Tracking and Client Relationship
Management Solution for Independent Businesses

Golden Tier Management Software, Inc.

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Introduction

What Can Universal Client CRM Multi-User Do For Your Business

Universal Client CRM Multi-User Edition is a comprehensive, integrated sales and client relationship management system that allows multiple *Universal Client CRM Multi-User* applications installed on different computers to access a shared database.

Deals can be tracked stage by stage from start of a deal to a sales order. Client demographics, deals, estimates and sales orders can tracked and reported through a variety of reports. Client related functions such as client communications, follow-ups, appointments, and complaints can be tracked along with due dates. A Master Activity Log allows for a comprehensive view of all due tasks from these client related To-do functions.

Universal Client CRM Multi-User will manage all of your **client's demographic information** for easy reference. Since *Universal Client CRM Multi-User* has universal application, the demographics information includes numerous fields; names, billing and shipping addresses, contact detail, associations, date of birth, gender, marital status, social security and EIN numbers.

Using the **Deals** function, the sales person can enter and track deals with clients and leads and change the status of the deal as it progresses through the various stages.

Estimates can be generated via the Sales Order function. View / Modify / Delete Estimates from the Estimates List by clicking the "Estimates" button on the Client Info screen. Sales Orders can be created via the Sales Order function or automatically created with a click of a button from an existing estimate. Sales Orders can be accessed via the Sales Order button on the Client Information screen.

Your business's **parts and services database** details are captured for reference in all the sales and billing transactions. The parts and service database includes fields for part numbering and descriptions, size, revision, unit price, unit of measure, serial numbers (if desired) and if the part or service is taxable. If a part or service is taxable, through the **sales tax table**, the applicable state sales tax rate is selected and used to accurately calculate sales tax. For convenience, a supplier can be associated with the part. The **supplier information** includes name, contact information and supplier's reference part number.

Using the customer demographics and the parts and service databases, **sales entries** are created by entering a part(s) selection, salesperson and charges. These sales entries are uniquely numbered and are easily tracked. **Sales Orders** can be created at any time, typically once a deal is closed. Sales Orders can be linked to a deal. **Sales estimates** can also be created and readily converted to a sales order.

Universal Client CRM Multi-User will assist in **scheduling** with clients and employees. The scheduler will set up and track appointments with clients by employee, date and time. Schedules are printed to assist in planning and managing your employee's activities. **Work orders** can easily be generated from the scheduler. A **follow-up planner** is available to provide reminders, to increase the level of customer service and reduce the stress of tracking multiple tasks.

Client **complaints** are logged and any corrective actions recorded. If managing a product complaints program, logged complaints are tracked by a unique identifying number and are tagged with an open or closed status to assist in tracking and follow-up.

Client communications are recorded in the client **communication log**. Easy access to an electronic diary allows communications to be recorded by client, employee, date and communication notes.

A **Master Activity Log** is available for an integrated view of all deal, communication log, complaints, follow-ups, and general ToDo tasks and appointments that are due. A variety of advanced search functions are available to restrict the view of todo tasks.

External digital document, such as Word® and Excel® documents, scanned files and pictures, are linked to the client record for immediate access. These **document links** allow for easy retrieval and display of files that are saved on your computer. Examples of external files are client specifications, digital photographs, and electronic faxes.

Since *Universal Client CRM Multi-User* is a database system, all the information and data are accessible and available for reports. Preformatted **reports** include client, employee, part/service, and supplier database listings. A variety of sales reports, client complaints, communication log, and deal reports can also be generated. All reports can be exported into Microsoft® Excel® spreadsheet formatted files.

System administration allows for the creation and maintenance of part / service information records, employee information, business location information, supplier information, company organization information, definition of states/regions/provinces, and deal process setup. Customization options allow for default employee, location, linked document storage, setting the beginning invoice number, the default linked files folder, automatic backup, backup location, and compacting of the database. Also, the multi-user version allows for the creation and deletion of usernames, changing of passwords, enabling/disabling user login, and selection of a new back-end database location.

Properly formatted **client databases and parts databases can be imported** into *Universal Client CRM Multi-User* to load existing databases. A **backup feature** allows for safe storage of all *Universal Client CRM* data and a **restore function** allows for data restoration.

Microsoft Office® Access 2007® run-time version is automatically loaded at the time of installation.

Chapter 1 System Requirements and Installation

The following system requirements are necessary to install *Universal Client CRM Multi-User*.

- Microsoft® Windows XP® Service Pack 2, Windows® Vista®, or Windows 7 operating systems
- Microsoft Office® Access 2007® full version or run-time version
- Minimum 175MB free disk space recommended

To install *Universal Client CRM Multi-User*, the installation file is either downloaded to your computer or directly installed from the website. If *Universal Client CRM Multi-User* is installed directly from the website, the installation file is saved on your computer. In the event the application is to be reinstalled, it must be reinstalled via the website. If the installation file is downloaded onto your computer, it can be reinstalled by running the *Universal Client CRM Multi-User* installation program directly from your computer.

To install the program via the website, click the “download” button. A popup window will appear. Choose whether to install from the website or to download the file to your computer. It is recommended that the installation file be downloaded onto your computer in the event it needs to be re-installed. When the file is finished being downloaded, double-click on the “exe” installation file to get to the installation process started. Click the “Next” button on the opening installation screen. Read the End-User License Agreement and click the “I accept the terms in the License Agreement” to proceed. This will enable the “Next” button on the screen. Click the “Next” button to continue. The installation program is setup to install the application in a pre-defined location. By default *Universal Client CRM Multi-User* application is installed in “C:\ProgramData\Golden Tier Management Software\Universal Client CRM Multi-User V3.0” in Windows 7. The database data file is installed when the user initially runs the application. The user will specify the location in which the database should be installed or where it currently exists. The shared location must be in a shared directory on a computer or server in order to be able to be accessed by multiple applications on different computers. Click the “Next” button to continue. The *Ready to Install* screen will display. Click the “Install” button to begin the installation.

The installation program will install both Microsoft® Access 2007® run-time environment and the *Universal Client CRM Multi-User* application and associated files. Click on the “Finish” button when the installation is complete (i.e., the “*Universal Client CRM Multi-User* Setup has been successfully installed” screen).

A *Universal Client CRM* icon will be created on the desktop and the *Start/All Programs/Universal Client Start* menu.

The first time the multi-user edition is executed, the user will be asked to select the location for the *Universal Client* database. The location should be a directory located on a server that can be accessed by all computers and users that will need to access the *Universal Client* data. If a server is not used, then a shared directory that is accessible by other computers and users should be created on a computer (see Microsoft Help or information on the internet regarding setting up shared directories on Microsoft operating systems). If a previous version of any *Universal Client* application was used prior to installation of the multi-user version, then copy the *Universal Client* database file “UniversalClient_DB.accdb” to the shared server location that is to be used for this application. This file can be a backup of the *Universal Client* database stored in a location specified by the user and backed up by any previous version of *Universal Client* using the “Backup Database” function in “System Administration”. If the user did not backup the file with the previous single-user version of any *Universal Client* application, then the database file for single user applications can be found in

the login user's local area specified by the operating system. For XP, it is typically in "C:\Documents and Settings*Login Name*\Local Settings\Application Data\Golden Tier Management Software\Universal Client Sales Manager\UniversalClient_DB.accdb". For Vista and Windows 7, it is typically in C:\Users*Login Name*\AppData\Local\Golden Tier Management Software\Universal Client Sales Manager\UniversalClient_DB.accdb". If this is the first time that the application is used, then a blank database will be copied to the selected shared server location that the user specifies.

If a previous version of the *Universal Client* database will be used, then it is possible that a security warning may popup during the installation. The installation will be modifying the database with new missing tables that are required for the *Universal Client CRM Multi-User* application. In Windows 7 the security warning message may appear that reads as follows: "A potential Security Concern has been identified. Warning: It is not possible to determine that this content came from a trustworthy source. You should leave this content disabled unless the content provides critical functionality and you trust its source." Click the "Open" button up to five separate times in order to properly complete the setup of the backend database. If you do not click the open button, then the database may not be properly updated and the application may not work. In this case, close the application and restart. The security message will appear again.

The *Universal Client CRM Multi-User* application has a built-in backup utility to backup this file to a user specified location. Alternately, the user can manually backup the file by directly copying the file from the installation directory (specified above) to a desired destination location for backup. The file must have the same name as the new installed file (i.e., "UniversalClient_DB.accdb") and be associated to open with Microsoft® Access 2007®. Do NOT run the application with Microsoft® Access 2003® or Access 2000®.

To run the program, double click the *Universal Client CRM* icon on the desktop or select *Universal Client CRM Multi-User V3.0* from *Start/All Programs/Universal Client*.

As the *Universal Client CRM Multi-User* application is used and data is entered, the program grows in size. The initial size at installation of the application program is over 38,000 KB. If the file size seems to affect system performance, the user can periodically compact the application by clicking the "Compact the Database on Close of Application" checkbox in **System Administration \ System Info**.

Chapter 2 How Do I Navigate Around *Universal Client CRM Multi-User*

Main Menu

The main menu is the first navigational launching point for *Universal Client CRM Multi-User*. Seven modules are available;

1. Clients and Sales Orders
2. Deals
3. Reports
4. Scheduler
5. Parts/Service Database
6. Master Activity Log
7. System Administration

Clicking on one of the main menu buttons opens that respective module.

Hot Links

Hot link buttons are found at the top of each screen. Clicking on these buttons quickly accesses and opens that module or feature.

Entering and Editing Information; Data Fields

Information is entered in four types of data fields. The four types of data fields are **free text**, **drop down list**, **numeric keypad pop-up** and **calendar pop-up** fields. In the *free text* field, unformatted information is entered, such as notes, names, and memos. A *drop down* list within an entry field allows for the selection of available data already entered and associated with that information field. *Numeric* pop-ups allow entry of numeric data via a calculator. *Calendar* pop-ups scroll by month with selection of the desired day. When a date field is selected by clicking on the field, a calendar icon appears next to the field. Clicking the calendar icon opens the calendar popup.

Entering, editing or deleting information within any module requires the activation of that module's screen. When initially opened, the module's screen is in a "View" mode, where data can only be viewed, but not edited or entered. To enter, edit or delete information on that screen, the screen must be activated by clicking on either the *NEW* or *MODIFY* buttons located at the bottom of the screen. When the *NEW* button is clicked, the screen is activated with all of the data fields blank. When the *MODIFY* button is clicked, the screen is activated and all the current data field information is present and can be modified. When a screen is activated, the data fields are highlighted; mandatory data fields are highlighted in blue. Highlighted data fields are accessible for addition or modification.

To save a new or modified record, click the *SAVE* button. The *SAVE* operation also puts the screen back into "View" mode.

While adding a new record or modifying an existing record, additions or changes are restored or "undone" by clicking the *Undo* button. All new and edited data fields are restored to their previous value and the screen returns to the *View* mode. Once a record is saved, changes cannot be undone using the *Undo* button.

Clicking the *DELETE* button deletes the entire record. The record is no longer accessible by the system.

Clicking the *CLOSE* button closes the screen. If changes or additions have not been saved, then the system prompts the user for confirmation whether to save changes before closing the screen.

Drop down fields display a list of available data for selection.

Detail information for data fields containing clients, employees, parts, suppliers, and locations can be displayed by double clicking on the data field or by clicking the hot button next to the data field. The information screen corresponding to the data opens on top of the existing screen. New data records can be entered or existing records can be modified on the fly. Newly added data records corresponding to the data field will be displayed in the drop-down after the pop-up screen is closed.

Record Searches

There are two types of search configurations. The first type of search option, found in client demographics and scheduler, uses a free text with wildcard search entry box which brings up search results in a drop-down list to the right of the search box. For example, typing the first letter, or multiple letters, of the desired search name with a * wildcard character into the search box (e.g., "abc*") will bring up all records starting with the letters "abc". Clicking on the desired selection in the search results drop down list opens the record. To bring up all records with "abc" within the name, type "*abc*" into the search box. To bring up all names ending with "abc", type "abc*". The standard wildcard characters can be used in all searches.

The client demographics search drop-down boxes contain additional search criteria. Selecting these search criteria from the drop-down box will bring up a pop-up screen that allows for entry of search by client ID, primary phone, date of birth, and alternate record number. Matching results from these searches will also bring up search results in a drop-down list found to the right of the search box. The second search box in client demographics allows for the search of a contact name or a keyword in the "Notes" area.

The second type of search option, found in most of the other screen and report popup criteria selection screens, uses a pre-filled in drop-down box for the selection of clients and employees, start and end date fields, and keyword search on description or notes fields to filter records displayed in reports. A combination of these search criteria can be used together to increase restriction of the search. Finally, there are check boxes at the left side of the search box to view all records or not-completed records (i.e., those screens that have due dates and status entries). These checkboxes function in combination with the other search criteria to narrow search. For example, if the "Not-Completed" flag is checked and a client is selected, then all not-completed tasks for the selected client will be displayed. If the "Show All" checkbox is checked, then all records for a selected client will be displayed. To remove restriction, either manually delete from a field or clear all constraints by clicking the *Clear* button.

Chapter 3 Setting-up Your Organization

Your Organization

From the **System Administration** Module, click on the Organization button. Enter and save the information pertaining to your organization. Organization information will appear on invoices, statements, and reports. Data fields include:

Organization / Proprietor Last Name: Name of the organization or if a self proprietor, owners last name. *(Required)*.

First: First name, if setting up the organization as a proprietor.

MI: Middle initial, if setting up the organization as a proprietor.

Sfx: Any suffix such as M.D., Ph.D., etc., if setting up the organization as a proprietor.

Int'l Zip and Phone: If clicked, foreign State information can be added or selected from the State dropdown. Zipcode (Postal codes), phone numbers, EIN (employer identification number,) and SSN are free format. The default address format (no checked box) is the U.S. address format.

Free Format: If clicked, *City*, *State*, and *Zipcode* fields are hidden and all international information is entered in the address text box. Phone numbers, EIN and SSN are also in free text format without any standard US separators. The default, unchecked, is to U.S. address format (*City*, *State*, *Zipcode*, *Phone*, *EIN*, and *SSN*).

Address: Main business address of the organization *(Required)*.

City: City where the organization is located *(Required)*.

State: State where the organization is located *(Required)*.

Zip: Zip code (Postal code) of the organization *(Required)*.

Country: Country in which the organization is located.

Manager: Manager, president, CEO, etc. of the organization. If the manager's name is not in the selection list, add the person by clicking the hot button, located to the right of the drop-down box. *(When adding the manager's name to the database, identify the manager as an employee.)*

Office Contact Name: Employee that is the main contact for the organization. If the office contact name is not in the selection list, add the person by clicking the hot button, located to the right of the drop-down box. *(When adding the contact name to the database, identify the office contact as an employee.)*

Phone Number: Main phone number for the organization *(Required)*.

Fax: Fax number for the organization.

Email: Email address for correspondence for the organization.

Website: Website address of the organization.

EIN: EIN number for the organization or the social security number, if a proprietor.

Cash Accounting: Flag indicating that the organization is using the cash accounting method. Financial reports show cash accounting when this field is checked off.

Accrual Accounting: Flag indicating that the organization is using the accrual accounting method. Financial reports show accrual accounting when this field is checked off.

To create or modify an organization record, click the *Modify* button. Only one organization record can be entered into the system. Enter or modify data fields and click the *Save* button.

While adding a new organization or modifying existing information, additions or changes are restored by clicking the *Undo* button. All new and edited data fields are restored to their previous value and the screen returns to the *View* mode. Once a record is saved, changes cannot be undone using the *Undo* button.

To close the screen, click the *Close* button. If changes have been made and not saved, then the system prompts the user with, “Do you want to save changes?”. Click *Yes* to save changes or *No* to not save changes.

Your Employees

Open the **System Administration** Module from the main menu. Click on the *Employees* button. New employees are created by clicking on the *New* button. After entering data, click the *Save* button. Data fields include:

<i>Employee ID:</i>	Auto-generated ID associated with the employee when a new employee record is created (data cannot be entered into this field).
<i>Alternate Record #:</i>	Previous or pre-established record ID for the employee.
<i>Employee Lastname / Co.:</i>	Last name or company name of an employee. <i>(Required)</i> .
<i>First Name:</i>	First name of the employee. <i>(Required)</i> .
<i>MI:</i>	Middle initial of the employee.
<i>Initials:</i>	The two or three first letters of the employee’s first, middle and last name.
<i>Sfx:</i>	Suffix to the employees name such as M.D., Ph.D., etc.
<i>Title:</i>	Title associated with the employee such as Dr., Prof., etc.
<i>Int’l Zip and Phone:</i>	If clicked, foreign State information can be added or selected from the State dropdown. Zipcode (Postal codes), phone numbers, EIN (employer identification number,) and SSN are free format. The default address format (no checked box) is the U.S. address format.
<i>Free Format:</i>	If clicked, <i>City</i> , <i>State</i> , and <i>Zipcode</i> fields are hidden and all international information is entered in the address text box. Phone numbers, EIN and SSN are also in free text format without any standard US separators. The default, unchecked, is to U.S. address format (<i>City</i> , <i>State</i> , <i>Zipcode</i> , <i>Phone</i> , <i>EIN</i> , and <i>SSN</i>).
<i>Address:</i>	Address at which the employee resides.
<i>City:</i>	City in which the employee resides.
<i>State:</i>	State in which the employee resides.
<i>Zip:</i>	Employee’s zip code.
<i>Country:</i>	The country in which the employee resides.

<i>Citizenship:</i>	Employee citizenship.
<i>Social Security:</i>	Employee social security number.
<i>Gender:</i>	Gender of the employee, either <i>M</i> for Male or <i>F</i> for Female.
<i>DOB:</i>	Employee's date of birth.
<i>Primary Phone:</i>	Employee's primary phone (e.g.; home phone).
<i>Ext:</i>	Extension on the primary phone.
<i>Secondary Phone:</i>	Employee's secondary phone number (e.g.; work number).
<i>Ext:</i>	Extension on the secondary phone.
<i>Fax:</i>	Employee fax number.
<i>Cell Phone:</i>	Employee's cell phone number.
<i>Pager:</i>	Employee pager number.
<i>Email Address:</i>	Employee email address.
<i>Comments:</i>	Comments or notes about the employee (e.g., hire date, any special considerations, etc.).
<i>Active:</i>	Flag indicating that the employee is an active employee with the organization. Employees no longer working for the organization should have the flag unchecked. If this flag is checked as active, the employee name appears on the scheduler, complaints, communications, follow-up screens and the reports filter popup screens.
<i>Sales RepFlag</i>	Flag indicating that the employee is a sales representative within the organization. If this flag and the active flag are checked, the employee name appears as a sales rep drop down list in the <i>Sales Order</i> screen.

Existing employees can be modified by clicking on the employee name from the employee list and clicking the *Modify* button. After changes to the data have been made, click the *Save* button to save the changes.

While adding a new employee record or modifying an existing record, additions or changes are restored by clicking the *Undo* button. All new and edited data fields are restored to their previous value and the screen returns to the *View* mode. Once a record is saved, changes cannot be undone using the *Undo* button.

To delete an employee record, select an employee from the list and click the *Delete* button. The system prompts the user to verify the deletion by asking, "Are you sure you want to delete the record?". Click the *Yes* button to delete the record or click the *No* button to cancel the deletion.

It is necessary to define all the organization's employees since there are required fields in the sale, scheduler, communication log, follow-up planner, returns, and complaints forms that require an employee to be entered before the record can be saved.

Those employees who are considered sales reps should be so indicated by checking the *Sales Rep* checkbox. Sales reps names appear in the sales reps drop down list in the *Sales Order* and some of the other employee drop-downs.

Employees can be made inactive and removed from the drop down lists by un-checking the "Active" checkbox. Only active employees appear in the drop down list. To display only "Active" employees

click on the *Show Active Employees* button. To see all employees, click the *Show All Employees* button.

Your Locations

Open the **System Administration** Module from the main menu. Click the *Locations* button. New locations for the organization where sales and/or services can be made are created by clicking on the *New* button. Data fields include:

- Location ID:* Auto-generated ID associated with the location when a new location record is created.
- Location Name:* Name of the location (e.g., Organization West Technology Center, Organization Headquarters, etc.). Multiple entries for the same organization are allowed to indicate all the organizations locations. This information can be used to identify from where location the sales was initiated. *(Required)*
- Int'l Zip and Phone:* If clicked, foreign State information can be added or selected from the State dropdown. Zipcode (Postal codes), phone numbers, EIN (employer identification number,) and SSN are free format. The default address format (no checked box) is the U.S. address format.
- Free Format:* If clicked, *City*, *State*, and *Zipcode* fields are hidden and all international information is entered in the address text box. Phone numbers, EIN and SSN are also in free text format without any standard US separators. The default, unchecked, is to U.S. address format (*City*, *State*, *Zipcode*, *Phone*, *EIN*, and *SSN*).
- Address:* Address of the organization's location.
- City:* City where the organization's site is located.
- State:* State where the organization's site is located.
- Zip:* Zip code for the organization's site location.
- Country:* Country in which the organization's site is located.
- Phone:* Primary phone number for the organization's location.
- Fax:* Fax number for the organization's location.
- Email:* Email address for the location.
- Location Contact:* Name of the employee as the general contact for the organization's location.
- Contact Phone:* Phone number for the location's contact person.
- Active:* Flag indicating that the location is an active location within the organization. Locations which have been closed or no longer active should have this flag unchecked. All active locations appear in the *Sales Order* screen.

Existing locations can be modified by clicking on the location name from the location list on the screen and clicking the *Modify* button. After making changes, click the *Save* button to save all changes.

While adding a new location record or modifying an existing record, additions are undone or changes are restored by clicking the *Undo* button. All new and edited data fields are restored to their previous values and the screen returns to the *View* mode. Once a record is saved, changes cannot be undone using the *Undo* button.

To delete a location record, select a location from the list and click the *Delete* button. The system prompts the user to verify the deletion by asking, “Are you sure you want to delete the record?”. Click the *Yes* button to delete the record or click the *No* button to cancel the deletion.

It is desirable to define all the organization’s locations since there are fields in the sale and follow-up planner that allow for a location to be entered.

Locations can be made inactive and removed from the drop down lists in the screens by un-checking the “*Active*” checkbox.

System Setup Information

Open the **System Administration** Module from the main menu. Click on the *System Setup Information* button. The module displays *Universal Client CRM Multi-User Product Information* such as version and build number and the End-Users License Agreement (EULA).

The System Setup Information allows the user to set the default directory pathway from where external documents are linked through the *Universal Client CRM Multi-User’s* linked documentation feature. Enter default information for where external (non-*Universal Client*) client files are stored (e.g.: *C:\ClientDocs*) in the “Linked Docs Default Directory” entry box.

Backup of the application and its data tables can be turned on by clicking on the *Enable Auto Backup* checkbox (see Chapter 17). The location to which the *Universal Client CRM Multi-User* application will be copied can be entered in the “Auto Backup Directory” entry box. The backup function will back up the entire application file containing all your data. This backup method makes it easy to restore the database if corruption, disk failure or other problems are encountered. If the user wishes to export data, each report has an *Export to XLS* button export the report data to a Microsoft Excel® spreadsheet. The exported file will be directed to the directory pathway defined in the **System Administration** module, *Systems Info* setup.

The Company Information sets the default company location, starting invoice number and default employee. Enter the default organization location from the *Location* drop-down list in the *Default Location* field (an organization can have multiple offices in different locations). Locations need to be pre-defined via the *Location* screen found in the **System Administration** module.

Setting the default for an employee automatically points the Scheduler appointment calendar to that employee.

The beginning invoice sequence number (default = 1) can be set by entering the starting invoice number in the *Invoice Number Start* field. This number will be first invoice number auto-assigned and each subsequent invoice number will increase by one. Invoice Numbers are generated for sales orders even though the number is not displayed in *Universal Client CRM Multi-User*.

To enable email support in *Universal Client CRM Multi-User*, click the "Enable Microsoft Outlook Email Support" checkbox. When this function is enabled, an email icon will appear throughout various screens in the system. Clicking the email button will automatically fill in the email address of the focused client on an individual screen if it is defined in the client demographics information. In the sales order screen, clicking the outlook button will attach either an estimate, sales order, invoice or receipt in printable form to the email.

A system info record is already created in the application. This record is modified by the user to add the previously described information. To modify the record, click the *Modify* button. Enter the desired information and click the *Save* button.

While adding new setup information or modifying existing information, additions or changes are restored by clicking the *Undo* button. All new and edited data fields are restored to their previous

value and the screen returns to the *View* mode. Once a record is saved, changes cannot be undone using the *Undo* button.

To close the *System Information* screen, click the *Close* button. If there are unsaved changes to the record, the system prompts the user, "Do you want to save changes?". Click the *Yes* button to save changes or click the *No* button not to save changes.

Microsoft Outlook Support

Microsoft Outlook email is enabled by default. Microsoft Outlook must be installed and configured on your PC in order for the Outlook email icons to work properly. Email icons are available throughout various screens in the system. Clicking the email button will automatically fill in the email address of the focused client on an individual screen if it is defined in the client demographics information. To disable email support within *Universal Client*, click the *Disable Email Support* checkbox in the System Info screen . When this checkbox is checked, Microsoft Outlook email icons will no longer be displayed throughout the system.

If Microsoft Outlook fails to start after clicking an Outlook button icon from within Universal Client, then try starting the Microsoft Outlook application manually first so that is open prior to clicking the Outlook buttons from within Universal Client.

Skype Support

Skype support is enabled by default. It is recommended that Skype Version 5.10.0.116 or higher be installed. The first time that Skype is used within Universal Client the user will need to bring up the Skype client application and click the allow "msaccess.exe" to access Skype dialog at the top of the screen . The Client Information (demographics) screen and Appointment screens have *Call* icons next to phone numbers that appear when the phone numbers are defined. Clicking the *Call* icon allows the user to initiate a call with the selected client using the designated phone number next to the *Call* icon. To disable Skype phone calling from within *Universal Client*, click the *Disable Skype Support* checkbox in System Info.

If Skype is installed on your computer, but cannot be invoked from Universal Client, then it is recommended that Skype be re-installed on your computer in the default installation directory. After re-installation, if Skype still does not open from Universal Client, then disable Skype support in System Administration / System Info.

Setting the Monetary Currency

The monetary currency is used in all sales transactions and calculations. The monetary currency default for *Universal Client CRM Multi-User* is the U.S. dollar; however, alternate local currencies can be selected using the Microsoft® *Regional and Language Options* feature.

Open the *Regional and Language Options* in Windows® Control Panel. On the *Regional Options* tab, under *Standards and formats*, click the desired locale and the appropriate currency will be formatted into *Universal Client CRM Multi-User*. Click *Customize* to change individual settings for the currency.

Note: To select an East Asian language or a complex script and right-to-left language, you must install the files for those languages. To install East Asian language files, open the *Regional and Language Options* in Control Panel. On the *Languages* tab, under *Supplemental language support*, select the *Install files for East Asian languages* check box. Click *OK* or *Apply*. A prompt appears to

insert the Windows CD-ROM or point to a network location where the files are located. After the files are installed, restart the computer.

Setting the International Address Format

Universal Client CRM Multi-User defaults to a U.S. address format, which includes the city, state, and zip code data fields. When the international address format is desired, the formatting option can be selected within each screen that requests an address entry. This option will remove the city, state, and zip code data fields and all address information will be typed into the address field. The selected U.S. or international address will appear in its entirety where the address display is required; e.g. invoices and reports.

Chapter 4 Setting-up the Client Database

Your Clients

From the main menu, open the ***Clients & Sales Orders*** Module to display the *Clients Information* screen. Enter, edit and delete a client's information from this screen. This information is referenced when establishing sales records, creating invoices and generating sales reports.

From the *Clients Information* screen, several Hot Link Buttons are present; System Administration, Parts / Services, Reports, Documents, Follow-Ups, Scheduler, Complaints, Communication Log (CommLog), Deals, Sales Orders, and Estimates.

When modules are opened through these hot link buttons (except the Scheduler) from the *Clients Information* screen, the respective data associated with the client record is displayed in each of the modules. The data displayed is always associated with the client name shown at the top left of the screen.

Create a Client Record

To create a new client record, click the *New* button at the bottom of the screen. Enter the client's last name or company name (a required field) and any other additional demographic and contact information. Click the *Save* button when finished entering data. Mandatory information is required in the blue highlighted data fields. The following data fields are available for data entry:

<i>Client ID:</i>	Auto-generated ID for the client
<i>Alternate Record #:</i>	Previous or pre-established record ID for the client.
<i>Active:</i>	Flag designating that this record is for a client that is active. Unchecking this box renders the client inactive, where the client remains in the database, but will not be available nor displayed in the client selection fields.
<i>Last Name or Company:</i>	Last name of the client or the company name of an organization. This is a required field in order to create a new client record.
<i>First:</i>	First name of the client.
<i>MI:</i>	Middle initial of the client.
<i>Title:</i>	Title for the client (e.g., Dr., Mr. Ms. Prof., etc.). The title can be selected from the drop-down list or entered manually if not in the list.
<i>DOB:</i>	Date of birth of the client.
<i>Gender:</i>	Gender of the client.
<i>Marital:</i>	Marital status of the client. Select from the drop-down list or enter manually if not in the list.
<i>Int'l Format:</i>	Defaults to U.S. address format (City, State, Zipcode). If clicked, <i>City</i> , <i>State</i> , and <i>Zipcode</i> fields are hidden and all international information is entered in the address text box.
<i>Bill to Address:</i>	Address to which a bill can be sent to the client.
<i>Ship to Address:</i>	Address to which merchandise can be shipped.
<i>City:</i>	City where the client resides.

<i>State:</i>	State where the client resides. Select a state from the drop-down list.
<i>Zip:</i>	Zip code. This is a 5-digit zip code followed by the extension.
<i>Country:</i>	Country where the client resides. Select the country from the list or enter manually.
<i>Social Security #:</i>	Social security number of the client.
<i>EIN:</i>	Company's EIN number.
<i>Client's Employer:</i>	Employer of the current client.
<i>Primary Phone:</i>	Primary contact phone number.
<i>Ext:</i>	Extension to the primary phone number.
<i>Secondary Phone:</i>	Secondary contact phone number.
<i>Ext:</i>	Extension to the secondary phone number.
<i>Cell Phone:</i>	Cell phone number.
<i>Fax:</i>	Fax number.
<i>Contact Person:</i>	If the client is an organization, then the contact person would be the name of the person in the organization that is the primary contact.
<i>Association:</i>	Association of the contact person to the organization or the client (e.g., manager, or if client is a person, then father, associate, etc.)
<i>Client Email:</i>	Contact email address.
<i>Website:</i>	Client's website.
<i>Notes:</i>	Any free-text notes regarding the client. If there is information for which there is no data entry box, then it can be entered here – up to 65,535 characters.

Client Record Search

To retrieve a client, enter the client's last name or company name in the search entry box at the bottom of the screen ("Enter Last Name or Select From List"). Wildcards (*) can use o retrieve all client records matching the search criteria (e.g., "smi*" retrieves all client records that have the first three letter equal to "smi", such as Smith). The results of the search are displayed in a list next to the search entry box entitled "Search Results". Select the client from this list.

Clients can also be searched by Client ID, Primary Phone, DOB Range or Alternate Record # by selecting from the Advanced Search dropdown list.

To clear the search boxes click the *Clear* button.

Modify a Client Record

To modify a client record, click the *Modify* button at the bottom of the screen. Make changes to any of the fields. Click the *Save* button at the bottom of the screen to save the changes. If the *Close* button is clicked prior to saving the record, the system confirms the save command before making the changes and closing the form.

While adding a new client record or modifying an existing record, additions are undone or changes are restored by clicking the *Undo* button. All new and edited data fields are restored to their previous value and the screen returns to the *View* mode. Once a record is saved, changes cannot be undone using the *Undo* button.

Deleting a Client Record

To delete the client record, click the *Delete* button at the bottom of the screen. The system confirms the record delete command before proceeding. The user must be aware that a client record cannot be un-deleted from the system. All deletions are final. The system will not delete any clients that have a sales record. Uncheck the *Active* flag to set a client as inactive. Client's that are inactive do not appear in any client drop-down boxes throughout the system.

Navigating through Client Records

To navigate through client records, the Up and Down arrows located at the bottom left of the screen can be used. Records are ordered alphabetically. The Up arrow moves to the previous record that is alphabetically before the currently displayed record. The Down arrow moves to the next record alphabetically after the currently displayed record. To display only "Active" clients click on the *Show Active Clients Only* checkbox. The Up and Down arrows will scroll alphabetically only through active clients. To see all clients (the default view), click the *Show All Clients* checkbox.

Printing Client Information

Client information can be printed by clicking on the *Reports* button at the top of the screen and the *Client Info* button on the Reports screen.

Chapter 5 Setting-up the Parts / Services Database & Suppliers

Your Parts / Services Database

From the **System Administration** Module or the *Sales Order* screen or the main screen, click on the **Parts / Services** button. Activate the *Parts / Services Database* screen by clicking on the *Add* or *Edit* button. Enter or edit the parts and service data. This information is referenced when establishing sales records, creating invoices and generating sales reports.

Parts / Services Database Field Definitions

<i>PartID:</i>	Auto assigned identification number.
<i>Part Number (Required):</i>	User defined part number that appears on sales invoices and reports.
<i>Part Name (Required):</i>	User defined name that appears on sales invoices and reports.
<i>Part Description:</i>	User defined part or service description.
<i>Part Size:</i>	User defined part size to assist in the part description.
<i>Part Revision:</i>	User defined to track the current part revision.
<i>Unit Price:</i>	User defined unit selling price.
<i>UOM:</i>	User defined unit of measure (e.g., foot, each, lb., gallon, hour)
<i>Taxable?:</i>	Mark the check box to automatically add the selected sales tax to the charge.
<i>State:</i>	State and tax rate to which sales tax is applied.
<i>Obsolete:</i>	Mark the check box to remove or obsolete the part or service from the active parts list. Obsoleted parts will not appear in any of the parts selection and drop down lists.

Part Supplier Information

<i>Supplier:</i>	The supplier of the part or service.
<i>Supplier Part No.:</i>	The supplier's cross-reference part number.
<i>Supplier's Part Description:</i>	The supplier's cross-reference part description.

A supplier can be associated with each part. To enter or edit new supplier information, double click on the Supplier Name data field or click on the hot button at the end of the supplier data field. Enter or edit the supplier information, save and close. Enter the supplier from the supplier drop-down. Additionally, the supplier's part number and part description can be entered.

Search for a Part

A part record can be selected from the "Select Part/Service from List". Select a record by clicking on the record in the list. Once selected in the list, the detailed part / service data is displayed on the screen. Use the Up and Down arrows to scroll through the Part/Service list. By default the list displays all parts, both obsolete and non-obsolete. Click the *Show Non-Obsolete Parts* checkbox to

display only active, non-obsolete, parts in the Part / Service list. Click the *Show All Parts* checkbox to show all parts, including obsolete parts.

Search for a part by entering the part name (wildcard characters can be used) and click the *Search* button next to the search field. Search for a part by entering the part number and click the *Search* button next to the search field. Search for a part by entering the part description (wildcard characters can be used) and click the *Search* button next to the search field. Clear the search fields by clicking the *CLEAR* button.

Sales Tax Table

Click the *Sales Tax Table* button to display, modify or add sales tax rates that are to be automatically entered into the sales / service order. The sales tax rate (percentage) is used to calculate sales tax due and is displayed as separate line entries on invoices, statements and reports.

Create a Part / Service Record

Click the *New* button to create a new Part / Service record. Enter part / service information. The entry can be a description of a part (e.g., Scented Candle, Fan Motor, Lumber) or a service rendered (e.g., Hourly Labor, Consulting, Lawn Cut, Tip). The *Part /Service Name* and *Part / Service Number* are required fields. Click the *Save* button to save the record.

Modifying a Part / Service Record

Click the *Modify* button and make changes to any of the data entry fields. Click the *Save* button to save changes.

Undo Changes

While adding a part / service record or modifying an existing record, additions are undone or changes are restored to their previous values by clicking the *Undo* button. All new and edited data fields are restored to their previous value and the screen returns to the *View* mode. Once a record is saved, changes cannot be undone using the *Undo* button.

Delete a Part / Service Record

A Part / Service record can be deleted by clicking the *Delete* button. The part cannot be deleted if it is referenced in a sale, but it can be flagged as obsolete.

Close the Screen

The Parts / Service screen can be closed out by clicking the *Close* button. If there are any unsaved changes to the record the system confirms whether to save changes before closing the screen.

Your Suppliers

Open the **System Administration** Module from the main menu; click on the *Suppliers* button or from the **Parts / Services** Module click on the Supplier hot button. Supplier data fields include:

Supplier ID: Auto-generated ID created during the creation of a new record.
Supplier Name: Name of the supplier such as the supplier's organization name (*Required*).

<i>Int'l Zip and Phone:</i>	If clicked, foreign State information can be added or selected from the State dropdown. Zipcode (Postal codes), phone numbers, EIN (employer identification number,) and SSN are free format. The default address format (no checked box) is the U.S. address format.
<i>Free Format:</i>	If clicked, <i>City</i> , <i>State</i> , and <i>Zipcode</i> fields are hidden and all international information is entered in the address text box. Phone numbers, EIN and SSN are also in free text format without any standard US separators. The default, unchecked, is to U.S. address format (<i>City</i> , <i>State</i> , <i>Zipcode</i> , <i>Phone</i> , <i>EIN</i> , and <i>SSN</i>).
<i>Address:</i>	Address of the supplier.
<i>City:</i>	City in which the supplier is located.
<i>State:</i>	State in which the supplier is located.
<i>Zip:</i>	Zip code for the supplier's location.
<i>Country:</i>	Country in which the supplier is located.
<i>Contact Name:</i>	Name of the main contact at the supplier.
<i>Phone Number:</i>	Phone number for the contact name.
<i>Fax Number:</i>	Fax number for the supplier.
<i>Website:</i>	Website address for the supplier.

To add a new supplier record, click the *New* button. Enter the supplier's information, click the *Save* button.

To change information on an existing supplier, select the supplier from the "Select Supplier from List" area and click the *Modify* button. Make changes to the record and click the *Save* button.

While adding a supplier record or modifying an existing record, additions are undone or changes are restored by clicking the *Undo* button. All new and edited data fields are restored to their previous value and the screen returns to the *View* mode. Once a record is saved, changes cannot be undone using the *Undo* button.

To delete a supplier record, select the supplier from the "Select Supplier from List" area and click the *Delete* button. The system verifies the deletion by prompting, "Do you want to delete this record?". Click the *Yes* button to delete the supplier record or *No* to cancel the deletion.

To close the *Supplier* screen, click the *Close* button. If there are any unsaved changes the system prompts the user with, "Do you want to save changes?". Click the *Yes* button to save changes or *No* to close the screen without saving any changes.

Chapter 6 Entering Estimates and Sales Orders

Sales Order Entry

Estimates and Sales Order entries are created through the **Sales Orders** module which is accessed from the hot links button found at the top right of the *Client Information* screen. Before creating a sales / service order entry, the client must be selected and displayed in the *Client Information* screen. Also, all parts / services and sales rep employees must be defined in their respective databases.

Creating a Sale / Service Record

Click the *Sales Orders* button at the top right of the *Client Information* screen and the *Sales Order Records* selection list displays. Click the *Create NEW Sales Order* button at the bottom of the Sales Order Records screen. The Sales Order screen opens in data entry mode. Start by entering the *Sales Info* first. *The sales information must be entered before any sales/service items are saved to the sales item list.* The system prompts the user to enter the following Sale Info:

- Sales Record ID:** This unique sale identifier is automatically filled-in when you save a new record.
- Sales Date:** Sets the date of the sale or service. *(Required)*
- Sales / Service Rep:** Sales or service representative credited for the actual sale or performing the service. This field is used to track employee sales activity. *(Required)*
- Estimate / Sales Order:** Sets the sale type for the sale or service. *(Required)*
- Client Job Number:** User defined to track sales against a client's job number.
- Client PO Number:** User defined to track sales, generate invoices and post payments against a client's purchase order number.
- Location:** The organization's site or location identifier (e.g., Chicago office, New York Headquarters, etc.) from which the sale or service was done.
- Sales Note:** Free text information.

If the sale type is an estimate or sales order, then the following additional information can be entered:

- Terms:** The terms are automatically filled in and are calculated as the difference between the invoice due date and the sale date. Alternatively, select from the drop-down list or manually enter the terms.
- Ship Date:** The ship date is the estimated date of shipment of the sale items or the date the service is to be performed. Clicking on the *Ship Date* data entry box displays a calendar icon that when clicked opens a calendar popup. Click on the desired date and the date is automatically filled-in to the *Ship Date* entry box.
- Ship Via:** The shipping service that is to be used.
- Shipping Costs:** The price of shipping if any to be invoiced and reported as a separate charge item.
- Ship To:** The shipping address if it is different than the shipping address associated with the client information (see Create a Client Record).

Sales Order Num: The sales order number is automatically sequenced to the next higher number. The sales order number can be manually entered; however, duplicate numbers are not allowed. *(Required)*

After the sales information is entered, enter sales items from the *Sale Item Entry* area on the screen. This is a required entry. A sale cannot be created without sale item charges. The data items that can be entered for a sale item are:

- Item Number:* The part / service number. *(Required)*
- Qty:* The quantity of the item. *(Required)*
- UOM:* The unit of measure for the item.
- Part / Service Name:* The description of the item.
- Unit Price:* The unit price of the item. *(Required)*
- Discount:* The discount being applied to the item as a percent.
- SubTotal:* The subtotal price before sales tax if any is applied. This item is not editable and is automatically calculated.
- Sales Tax:* The sales tax, if any, applied to the subtotal as a percent.
- Serial Number:* The serial number of the item.
- Charge Note:* Any note associated with the charge item.

With the *Sales Orders* module activated, enter a sale item by selecting the Part / Service Number from the *Part / Service Number* drop-down list. The quantity is entered in the *Qty* data entry box. The *UOM*, unit price, part description, discount, and sales tax (if applicable) are automatically filled-in with their default values as defined in the *Parts / Service* database or can be changed in the data field on an individual basis to the desired values. Changing these part/service item values during the creation of a sale will not affect the default values set in the *Parts / Service* database.

Click the *Save to Item List* button to save the item or service to the *Sales Item List* associated with the sale. When a charge entry is saved, a charge ID number is auto-assigned and is associated with the respective sales record ID number. As many Part / Service items can be entered as desired before saving the sale order. To enter another Part / Service, click the "Enter New Item" button, select another Part / Service Number from the Part / Service Number drop-down box in the *Sale Item Entry* area and fill-in the quantity. Click the *Save to Item List* button to save the new part / service item to add the item to the Sales Item List.

Alternatively, to clear the Sale Item Detail area when a sales item is selected, click the *Clear Entry Area* button to the right of the list. A new item can now be entered. Click the *Save to Item List* button to add it to the Sales Item List. Enter as many sales items as needed.

To delete a charge / service item from the *Sale Item List*, select the item from the list and click the *Delete Item* button at the right of the Sales Item List. This will remove the item from the sale.

Once all data has been entered or modified, save the sale order by clicking the *Save Order* button at the bottom of the Sales Order screen.

Creating an Estimate

If a client requests an estimate for parts or services, then the sale / service record must be saved as type "Estimate". Click on the *View Estimate* hot link button to preview the estimate in a printable

format. This displayed estimate form can be printed for distribution to a customer or saved in PDF format as a file. Use the ribbon controls at the top of the form.

A list of all estimates can be displayed by clicking on the *Estimates* button at the top right of the Client Information screen. Double clicking on an estimate in the estimate list opens the sales order screen for the selected estimate. Clicking the "Preview Estimate" button displays the estimate in printable format which can then be printed or saved in PDF format.

Creating a Sales Order

When a deal is closed, a sales order can be created, by clicking the *New* button, clicking the "Sales Order" checkbox, and filling in the rest of the order. When the sales order type is clicked, then additional sales order data fields become visible for entry of the terms, ship date, ship via, shipping cost, alternate shipping address, and sales order num. Click the *Save* button to save the order. A formal sales order in printable format can be generated by clicking the *View Sales Order* button.

If an estimate has already been created as a potential sale, then a sales order can be automatically created from the estimate by clicking the *Auto-Create Sales Order from Estimate* button from the selected estimate record.

Modifying a Sales / Service Record

To modify a sales / service record, click the *Modify* button. Modify any of the Sales Info and Invoice data fields. To modify a sales item, select the sales item from the *Sales Item* list, modify any of the sales item data fields and click the *Save to List* button. When all edits are complete, click the *Save* button at the bottom of the screen. Sales orders that have returns or payments are locked and cannot be modified.

Moving from an Estimate to an Associated Sales Order

If an estimate is selected, then to move directly to a sales order that was created from the selected estimate, click the *Goto SO* button to the right of the estimate checkbox. If there is no associated sales order, then the system will prompt the user if a sales order should be automatically created, else the focus of the sales order screen will move to the associated sales order.

Moving from a Sales Order to an Associated Estimate

If a sales order is selected, then to move directly to an associated estimate from which the sales order was created, click the *Goto Est* button to the right of the sales order checkbox. If an associated estimate exists, then the focus of the sales order screen will move to it.

Deleting a Sales Order

A sales order record can be deleted from the Sales Orders popup form, which shows the list of all sales orders. Select the sale record to be deleted from the list. Click on the *Delete* button to delete the selected sale record from the Sales Orders list. The system asks for confirmation prior to deletion. Sales orders that have returns or payments are locked and cannot be deleted.

Undo Changes

During the modification of a sales / service record, the original data prior to the modification can be restored, before the *Save* button is clicked. To undo changes or additions during modification, click the *Undo* button and all modified data values are restored to their previous value and the screen returns to *View* mode. Once a record is saved, changes cannot be undone using the *Undo* button.

Copy A Sales Order Record

A copy of an existing sales order record can easily be made by clicking the Copy button. Select a sales order record that you would like to copy and click the Copy button. The copy function will make a duplicate of the selected record and put the new record into an edit state. Fill-in the sale date and make any other additional changes and click the Save button. This function allows for the easy creation of sales order from existing sales orders without the need of entry each time of every charge and other sale information. Point of Sale records and invoiced sales orders are copied as "Sales Order" records in Universal Client CRM. Point of Sale records and Invoicing of Sales Orders can only be done using Universal Client Sales Manager Pro.

Up and Down Arrows

By clicking the Up arrow the screen displays the previous sales record in the sales list. Records are ordered by sale date in a descending order. By clicking the Down arrow the screen displays the next sales record in the sales list. If there is no current sales record displayed, the screen starts with the latest sales record.

Closing the Screen

Click the *Close* button to close the Sale Order screen. If additions or changes have not been saved, then the system prompts you to confirm saving changes.

Sales Charges Summary

At the top of the *Sales / Service* screen is summary information regarding the charges for the currently displayed sale. The Subtotal, tax, shipping, sale total amount, and amount due are shown separately.

Chapter 7 Linking External Documents

Association of external documents to a client's record can be made by the *Linked Documents* Module. This module allows the user to associate external documents related to the client such as Microsoft® Word®, Microsoft® Excel®, Microsoft® PowerPoint®, PDF, JPEG images, MPEG movies, etc. Once linked, the documents can be opened directly from the *Client Documents* screen. Thereby, all of a client's associated documents are brought together in a list and opened directly from within the *Client Documents* screen. A document opens with the application associated to the document file type.

Linking an External Document to the Client Record

To link an external document to the client record, click the *Documents* button at the top of the *Client Information* screen. On the *Client Documents* screen click the *Link Document* button at the bottom left corner of the screen. The Microsoft® Office file selection window opens. Browse the computer directories, find and select the desired file and select it. Click the *Select* button. The file is added to the top of the Linked Documents List and the file and its entire path on the computer is shown. Link as many additional files as desired from any area on the Linked Documents List.

By setting the *Linked Docs* Default Directory in the **System Information** screen, the file selection window opens by default to the specified directly.

Removing a Linked Document

To remove a document from the Linked Documents List, select the document in the list that you want to delete and click the *Remove* button. The system verifies the deletion by asking, "Are you sure you want to remove the linked document from the list?". Click the *Yes* button.

Opening a Selected Document

To open and display a selected document in the Linked Documents List, select the document from the list and click the *Open Selected Document* button. Alternatively, double click on the document in the Linked Documents List. If a document has been moved from the directory from which it was linked then it will not be able to be opened. In this case, delete the document from the list and re-link it to new location.

Closing the Screen

To close the screen, click the *Close* button.

Chapter 8 Tracking Deals with Clients and Leads

Deals with clients or leads can be created and tracked using the Deals function. The Deals function can be accessed from the main *Universal Client CRM Multi-User* screen and from the Client Information, Communications Log, FollowUps, Master ToDo List screens. Clients or leads must be created in the Client Information screen before a Deal can be defined. Once a Deal is created, then it can be modified (i.e., tracked) as it progresses through various stages of the deal process. Deal processes specific to every company's sales of services and products can be defined in the Deal Process Definition screen that can be accessed via the System Administration screen.

Deal Field Definitions

- Deal ID:** An auto-generated identification number for the deal.
- Client / Lead:** The client or lead for whom this deal is defined. The client is chosen from a drop-down selection of all active clients. *(Required)* A hot link button is location to the right of the field which will display the Client Information screen to view client details or create a new client or lead.
- Deal Start Date:** The date on which the deal process is started. *(Required)*
- Deal Type:** The type of deal. The type can be selected from the drop-down list which includes deal types for product and service deals or a custom deal type can be entered manually. *(Required)*
- The deal types in the drop-down list are generated from the Deal Process Definition function in System Administration. Deal Process definitions should be reviewed and customized, if desired, or new deal process definitions added prior to using the Deal function. A hot link button next to the Deal Type drop-down links directly to the Deal Process Definition screen.
- Potential Revenue:** The estimated amount of potential revenue from the deal.
- Estimate of Success:** An estimation of the success of closing the deal. The estimate of success must be selected from the drop-down list (e.g., High, Medium, Low).
- Deal Stage:** The stage of the deal. The deal stage can be selected from the drop-down list or a custom value entered manually. *(Required)*
- When a Deal Type is entered, the stage drop-down is populated with the deal stages defined in the Deal Process Definition database that correspond to the Deal Type entered in the "Deal Type" field. If a custom Deal Type is entered with no corresponding definitions in the Deal Process Definition database, then the Deal Stage drop-down will be blank. A hot link button next to the Deal Stage field will popup the Deal Process Definition screen.
- Stage Due Date:** The due date when the Deal Stage needs to be completed. *(Required)*
- The Master ToDo List will display uncompleted deal due dates
- Next Stage:** The next stage in the Deal Process. The next stage will be automatically filled in from the Deal Process Definition database that corresponds to the next stage in the stage order for the selected Deal Type. A hot link button next to the Next Stage field will popup the Deal Process Definition screen.
- Expected Close Date:** The expected close date for the deal.

- Deal Status:* The current status of the deal. The deal status must be selected from the drop-down list and includes status states for "In-Progress", "Completed", "Canceled", "Lost Sale" and "On-Hold". *(Required)*
- Notes:* Any general notes, details or comments regarding the deal.
- Source:* The source for the deal lead. The source can be optionally entered using the drop-down which contains many general sources such as referral, cold call, etc. A specific person name or other descriptor can be manually entered.
- Employee:* The employee making the deal. Choose from the list of defined, active employees from the drop-down. *(Required)*
- A hot link button is located next to the "Employee" field which brings up the Employee popup where any new employees can be added.
- Location:* The location of your organization from which the deal is being made. A hot button is located next to the location field where new locations (i.e., offices) can be defined for your organization.

Entering a Deal

To enter a new deal, click the Add button at the bottom left corner of the Deal screen. The current, focused client (if selected) will be automatically entered, today's date will be filled in, the Deal Status will automatically be filled in as "In-Progress", and the default employee (if setup in System Info) will be entered. Enter all required field data and any other fields that are known at the time and click the Save button. During the deal process as the deal progresses from stage to stage, the deal record should be modified to reflect the current status and description of the deal. In other words, there should only be one deal record per deal, *not* a new deal record for every stage of the process.

Modifying a Deal

Deal records can be modified by selecting a deal from the Deal List and clicking on the *Modify* button at the bottom of the *Deals* screen. A deal can be selected from the deal list by directly clicking the deal record from the deal list or scrolling to the deal record using the up or down arrow buttons located at the bottom of the deal list. Change any of the available fields and click the *Save* button. Typically, the deal stage, stage due date, and notes will be changed from stage to stage. The Deal Status should be changed if the deal is put on hold or lost or completed.

Tracking a Deal

To track the progress of a deal, click the *Modify* button and update the desired fields. Typically, the Deal Stage and Stage Due Date will be updated. Any changes to any of the fields in the deal record will be logged in the Deal Journal. Any notes for a deal can also be logged using the Deal Journal.

Undo Changes

While adding a new deal record or modifying an existing record, additions are undone or changes are restored to their previous values by clicking the *Undo* button. All new and edited data fields are restored to their previous value and the screen returns to the *View* mode. Once a record is saved, changes cannot be undone using the *Undo* button.

Delete a Deal Record

To delete a deal record, select the deal from the list and click the *Delete* button on the bottom of the *Deals* screen. The system will prompt the user if you are sure you want to delete the record. Click the "yes" button to complete the deletion process. It is not recommended that records be deleted unless you need to start from scratch.

Deal Journal

The Deal Journal is used to track deal notes at any stage of the deal process. The deal journal also acts as a deal audit trail - it records any changes to the deal record. To create a journal entry, click the *Deal Journal* button. On the Deal Journal screen click the New button, and enter the Journal Date, Journal Entry Employee, and the Journal Entry note. Click Save to save the deal journal entry.

Create Sales Order Associated to Deal

Click the *Create Sales Order for Deal* button next to the Sales Order ID field to invoke the Sales Order screen and create a sales order associated to the deal. The Sales Order ID field will be updated with the SaleID when the sales order is saved. If the SalesOrderID field contains a SaleID, then the sales order can be viewed or modified by clicking the *View/Modify Sales Order* button next to the Sales Order ID field.

Closing the Screen

To close the *Deal* screen, click the *Close* button. If there have been additions or modifications that were not saved, the system prompts the user if to save the record prior to closing the screen.

Scrolling through Records

To scroll through deal records, click the *Up arrow* to scroll to go to the next record up the list and the *Down arrow* to scroll to the next record down the list.

Change Sort Order

The Deal List can be sorted by the Deal Start Date and the Due Date. Click the *Sort* button at the bottom the "Start Date" column to change the Start Date sort order. Click the *Sort* button at the bottom of the "Due Date" column to change the Due Date sort order.

Search Options

An advanced search function is provided at the bottom of the screen. Records can be searched By Client, By Employee, By keyword in Notes, and by Date Range. These constraints can also be used in combination with each other. For example, a search can be initiated for records that contain a selected client and a selected employee and a typed keyword between two chosen dates. As soon as a client or employee is selected a new search is initiated and records are displayed in the record list. Also, the Search button can be clicked to initiate a search which uses all entered constraints. Additionally, there are checkboxes at the left of the search area which can be checked to display only "Not-Completed" records or "All" records regardless of completion status. If constraints are entered when the "Not-Completed" flag is checked, then all "Not-Completed" records with the constraints will be displayed. The default view of records when the screen is opened is all not-completed records. Click the "Show All" button to show all the records. Once constraints have been entered, then these constraints can be removed one by one to broaden the search or can be cleared out by clicking the Clear button.

Deal Report

An Individual Deal Report can be generated by clicking the *Indiv Deal Rpt* button. All data fields for a specific deal including all journal entries will be included in the report. Click the *Preview Deals List Rpt* button at the top of the screen to print a report of all the deals in the Deal List.

Chapter 9 Setting up Deal Process Definitions

Each company may have its own process consisting of a set of stages or steps to proceed through a deal that is designed to lead to the close of a deal. *Universal Client CRM Multi-User* has two pre-defined deal processes for a product and service deals. These pre-defined deal processes can be modified to fit a company's process or a new deal process can be defined in addition to the pre-defined processes. To invoke the Deal Process Definitions screen, click the *System Administration* button on the main screen and then click the *Deal Process Definitions* button. Alternately, from the Deals screen click the hot buttons at the right of the "Deal Stage" or "Next Step" fields to invoke the Deal Process screen. Deal processes should be defined before creating deals, but custom on the fly data can be entered into the "stage" fields when creating or modifying a deal record. Each record created in the Deal Process Definitions screen represents one stage in a deal process for an associated deal type ("Product Deal", "Service Deal", etc.). Typically, multiple records will be created, corresponding to individual stages within a deal process. The deal process can be made as detail as desired by adding as many stages to a deal type as needed. The deal process name will be designated by the "Deal Type Identifier" and will appear in the Deal screen as a deal "Type" in the Type drop-down box.

Deal Process Field Definitions

<i>Deal Type Identifier:</i>	The type of deal (e.g., Product Deal, Service Deal, or another descriptor). <i>(Required)</i> The deal type can be selected from the list which is created from existing types already defined in the deal process definitions database or a new description entered.
<i>Deal Stage:</i>	A description of the deal stage (e.g., Identify Need, Qualification, etc.). <i>(Required)</i> A deal stage can be selected from the drop-down which is created from existing deal stages defined in existing deal processes or a new stage description entered.
<i>Stage Order:</i>	The numerical order of the stage. For example, the number 1 would designate the first step in the deal process, the number 2 the second step in the deal process, etc. <i>(Required)</i>
<i>Deal Type Description:</i>	Detailed description of the deal stage.

Creating a Deal Process Definition

To create a deal stage, click the *New* button at the bottom left of the screen. Fill in the required fields (in blue) and click the *Save* button. Next, define the next stage in the process by creating a New deal record with the same "Deal Type Identifier". Keep adding records with the same "Deal Type Identifier" until all the deal process stages have been defined. After this definition, the "Deal Type Identifier" will appear in the "Type" field in the Deals Screen. The "Deal Stage" will appear in the "Deal Stage" field in the Deals screen and the "Next Step" field will show the next Stage description corresponding to the next stage in the order of the process.

Modifying a Deal Stage

Each deal stage in the deal process definition can be modified by selecting a deal stage from the Deal List and clicking on the *Modify* button at the bottom of the screen. Change any of the available fields and click the *Save* button at the bottom of the screen.

Undo Changes

While adding a new record or modifying an existing record, additions can be undone or changes restored to their previous values by clicking the *Undo* button. All new and edited data fields are restored to their previous value and the screen returns to the *View* mode. Once a record is saved, changes cannot be undone using the *Undo* button.

Delete a Deal Record

To delete a record, select a stage record from the list and click the *Delete* button on the bottom of the screen. The system will prompt the user if you are sure you want to delete the record. Click the "yes" button to complete the deletion process.

Closing the Screen

To close the screen, click the *Close* button. If there have been additions or modifications that were not saved, the system prompts the user if to save the record prior to closing the screen.

Chapter 10 Master Activity Log

The Master Activity Log can be invoked from the main screen, client information, deals, communication log, General ToDo List, and FollowUp screens. The Master Activity Log displays records in one place from various functions throughout *Universal Client CRM Multi-User* that have a due date or completed / not-completed state associated with them. The Master Activity Log displays records for upcoming appointments, not-completed or due tasks associated with deals, client communications, client follow-ups, and general todo tasks in order to have one integrated view and search capability for all upcoming or due tasks.

Master Activity Log

The Master Activity Log displays the following fields:

<i>Type:</i>	The type of task record (i.e., <i>Appt</i> - appointment, <i>Deal</i> - deal record, <i>FollowUp</i> - client follow-up task, <i>CommLog</i> - client communications log record, and <i>General</i> -general todo task).
<i>Status:</i>	The status of the task record (i.e., "In-Progress", "Pending", "Not-Started", "Completed", etc.).
<i>ToDo Task:</i>	The description of the task.
<i>Priority:</i>	The priority of the task.
<i>Due Date:</i>	The due date for the task. The due date can be sorted by clicking the due date label.
<i>Client:</i>	The client associated with the task.
<i>Employee:</i>	The employee associated with the task.

View Details of Task Records

To view details of any task record in the Master Activity Log, click the icon with the open book graphic at the far right of a selected record. The appropriate screen relevant for the record will display focused onto the specific record in the Master Activity Log. From this point the record can be modified, new records added or deleted. For example, if focused on a deal record in the Master Activity Log, when the icon is clicked the Deal screen appears focused onto that deal record that has the task due. If an appointment record has the focus on the Master Activity Log and the icon is clicked, then the scheduler displays for the appropriate appointment.

Search Option

An advanced search function is provided at the bottom of the screen. Records can be searched By Client, By Employee, By keyword in the task field, and by Date Range. These constraints can also be used in combination with each other. For example, a search can be initiated for records that contain a selected client and a selected employee and a typed keyword between two chosen dates. As soon as a client or employee is selected a new search is initiated and records are displayed in the record list. Also, the Search button can be clicked to initiate a search which uses all entered constraints. Additionally, there are view constraints which can be selected to display only "Not-Completed" records or "All" records regardless of completion status. If constraints are entered when the "Not-Completed" flag is checked, then all "Not-Completed" records with the constraints will be displayed. Also, check boxes are available to show all tasks that are overdue, due today, due next 7 days, and tasks due in future. The default view of records when the screen is opened is all not-

completed records. Once constraints have been entered, then these constraints can be removed one by one to broaden the search or can be cleared out by clicking the *Clear* button to show all records.

By default "non-completed" records are displayed in the Master Activity Log. By clicking the "non-completed" check box off, all records both completed and non-completed are displayed. By clicking the "OverDue" check box, all records prior to today that have not been "completed" will show in the list. By clicking the "Due Today" check box, non-completed records for today will be displayed. By clicking the "Due Next 7 Days" check box, non-completed records for the next 7 days will be displayed. By clicking the "Due in Future" check box, non-completed records from today and into the future will be displayed. Additional constraints in the search section such as a selected client or employee will apply with these checkboxes.

Navigation Button

There are hot link button at the top of the Master Activity Log screen that correspond to each category of task that is displayed in the Master Activity Log. By clicking the hot link button at the far right of each record, the appropriate screen is displayed for the specific type of ToDo task. Also, buttons are available at the top of the screen for the Scheduler, Client Communications Log, Client Follow-Up Planner, Client Deals, Client Complaints, and General ToDo Task functions. A report of the Master Activity Log can be printed by clicking the *Preview Master Activity Rpt* button.

Change Sort Order

The default view of all non-completed tasks is "Due Date" descending. To change the sort order, click the "Due Date" heading and it will toggle between Due date descending and Due Date ascending.

Chapter 11 General ToDo Tasks

General ToDo Tasks, that is, those not necessarily associated with a client can be entered using the General ToDo Tasks screen. Go to the Master Activity Log and click the General ToDo Tasks button at the top of the screen.

General ToDo task fields consist of:

<i>Start Date</i>	The start date of the task. <i>(Required)</i>
<i>Task Type;</i>	The type of task (e.g., Information Technology, Accounting, Reports, etc.) Choose from the drop-down list that includes predefined tasks or enter your own.
<i>Task Description:</i>	The description of the task.
<i>Priority:</i>	The priority of the task. Choose from the drop-down list that includes predefined priorities or enter your own.
<i>Due Date:</i>	The date the task is due to be completed. <i>(Required)</i>
<i>Employee:</i>	The employee to whom the task is assigned. Choose from a list of active employees. <i>(Required)</i> A hot button is provided next to the employee drop-down that pops up the employee screen if new employees are to be defined or detail about the employee needs to be viewed.
<i>Client:</i>	The client with whom the task is associated. <i>(Optional)</i>
<i>Status:</i>	The status of the task. Choose from the drop-down list. <i>(Required)</i>

Add a New Task

To add a new task, click the *Add* button at the bottom of the screen. Enter all the required fields and click the *Save* button at the bottom of the screen.

Modifying a Task

To modify an existing task, select the task record from the list and click the *Modify* button at the bottom of the screen. Make modifications to the record and click the *Save* button at the bottom of the screen.

Undo Changes

While adding a new record or modifying an existing record, additions are undone or changes are restored to their previous values by clicking the *Undo* button. All new and edited data fields are restored to their previous value and the screen returns to the *View* mode. Once a record is saved, changes cannot be undone using the *Undo* button.

Delete a Deal Record

To delete a record, select a record from the list and click the *Delete* button at the bottom of the screen. The system will prompt the user if you are sure you want to delete the record. Click the "yes" button to complete the deletion process.

Closing the Screen

To close the screen, click the *Close* button. If there have been additions or modifications that were not saved, the system prompts the user if to save the record prior to closing the screen.

Change Sort Order

Records are displayed by default by Due Date descending order. To change the due date sort order, click the "Sort by Due Date" button which will have a label that indicates whether it will sort descending or ascending order. To change the Start Date sort order, click the "Sort by Start Date" button which will have a label that indicates whether it will sort descending or ascending order. To change the Employee name sort order, click the "Sort by Employee" button which will have a label that indicates whether it will sort descending or ascending order.

Chapter 12 Complaints

Client complaints tracking and resolution can be done through the **Complaints** Module. Click the *Complaints* button at the top of the *Client Information* screen. A history of all complaints is kept in the database and can be viewed through this screen by scrolling through the complaint records. When a complaint is received and recorded via the *Complaints* screen, a communications entry record is automatically written to the communications log indicating a communication with the client regarding a complaint.

Complaint Field Definitions

<i>Complaint ID:</i>	Auto-generated unique complaint ID.
<i>Complaint Description:</i>	(Required) Description of the client's complaint.
<i>Corrective Action History:</i>	Correction action history to resolve the complaint. This field can have multiple entries at different times that together show the history of how the complaint was resolved.
<i>Date Received:</i>	Date the complaint was received. It is automatically filled in with the current date.
<i>Date Closed:</i>	Date the complaint was closed (e.g., resolved).
<i>Employee Taking Complaint:</i>	Employee who logged the complaint (e.g., talked to the client).
<i>Status:</i>	Status of the complaint either "open" or "closed". After resolution, this field can be set to "closed".

Logging a Complaint

To log a complaint from a client, click the *New* button on the bottom left of the *Complaint* screen. Type in the complaint description into the *Complaint Description* field.

If the complaint has been resolved, enter the resolution in the *Corrective Action History* field and click on the *Date Closed* field. A calendar icon appears and when it is clicked the calendar opens. Select the date of the corrective action and the status as "closed" in the *Status* field.

Select the employee logging the complaint from the list. To view employee details click on the hot button to the right of the *Employee Taking Complaint* field.

Click the *Save* button. A complaint record is automatically created in the communication log, indicating a communication with the client in regards to a complaint.

Modifying a Complaint

To modify an existing complaint or enter a corrective action at a later date, then click the *Modify* button on the bottom right of the *Complaint* screen. Make modifications to the record or enter the corrective action. Click the *Save* button.

Undo Changes

While adding a new complaint record or modifying an existing record, additions are undone or changes are restored by clicking the *Undo* button. All new and edited data fields are restored to their previous value and the screen returns to the *View* mode. Once a record is saved, changes cannot be undone using the *Undo* button.

Search Options

An advanced search function is provided at the bottom of the screen. Records can be searched By Client, By Employee, By keyword in the task field, and by Date Range. These constraints can also be used in combination with each other. For example, a search can be initiated for records that contain a selected client and a selected employee and a typed keyword between two chosen dates. As soon as a client or employee is selected a new search is initiated and records are displayed in the record list. Also, the Search button can be clicked to initiate a search which uses all entered constraints. Additionally, there are view constraints which can be selected to display only "Not-Completed" records or "All" records regardless of completion status. If constraints are entered when the "Not-Completed" flag is checked, then all "Not-Completed" records with the constraints will be displayed. Once constraints have been entered, then these constraints can be removed one by one to broaden the search or can be cleared out by clicking the *Clear* button to show all records.

Complaints Report

To print a complaints report, click the *Preview Complaints Rpt* button. Alternatively, click the *Reports* button, followed by the *Complaints* button on the Reports screen. The complaints report filter pops up with the client automatically filled in. Optionally, enter a date range by clicking on the date range fields and selecting a date from the calendar popup. Optionally, change the status of the complaints to be reported from "All" to either "open" or "closed" complaints. Click the *Preview Report* button to generate the complaints report. Alternatively, to export the report to Microsoft® Excel®, click the *Export to XLS* button.

Closing the Screen

To close the Complaint screen, click the *Close* button. If changes or additions have not been saved, then the system asks the user, "Do you want to save your changes?". Click the *Yes* button if you want to save the changes or additions or click *No* to undo the changes or additions.

Change Sort Order

Records are displayed by default by Date Received descending order. To change the Date Received sort order, click the "Sort by Date Received" button which will have a label that indicates whether it will sort descending or ascending order.

Chapter 13 Client Communications Log

All types of communications with the client can be tracked by the *Client Communications Log* Module. Click the *Comm Log* button at the top of the *Client Information* screen. A history of all communications with the client including the subject matter is displayed in the log. This screen is used to track any communications with the client and follow-up actions that are to be taken after the communication.

Communications Log Field Definitions

<i>ID:</i>	Communications log ID is auto-generated when a new communication log record is created.
<i>Communications Date:</i>	Date of the communication with the client.
<i>Client:</i>	<i>(Required)</i> The client with whom the communication took place.
<i>Priority:</i>	Priority or urgency level of the communication (i.e., high, medium, low).
<i>Communication Type:</i>	Type or category describing the communication (i.e., Billing, Inquiry, Invoice, Payment, Quote, Sale, Complaint, other, etc.).
<i>Communication Description:</i>	Description of the communication with the client.
<i>Employee:</i>	Employee logging the communication with the client.
<i>Completed:</i>	If checked, the flag indicates that the communication is complete and has no additional follow-up tasks. If unchecked, then the flag indicates that there are additional follow-up tasks or action(s) that may be pending regarding the communication.

Creating a New Communication Log Record

To create a new communication log record, click the *New* button on the lower left corner of the *Communication Log* screen. The communication date is automatically filled in with the current date. To change the date, click on the field and enter the communication date via the popup calendar. The client is automatically filled in *(Required)*. To change the client with whom the communication is taking place, select from the list. Optionally, select the priority level (urgency) of the communication. Optionally, select the communication type. Enter the communication description. Optionally, select the employee with whom the communication is taking place. Check the *Completed* flag if the communication is complete and there are no additional follow-up tasks. Enter the follow-up tasks in the *Communication Description* field. Click the *Save* button. Optionally, schedule a follow-up with the client via the follow-up planner module. (See Chapter 14 for more detail on the follow-up planner.)

Modifying a Communication Log Record

To modify an existing communication log record, select an existing communication log record from the Communication Log list and click the *Modify* button in the lower left hand corner of the *Communication Log* screen. Make changes to any of the fields in the field entry area at the top of the screen. Click the *Save* button to save the changes.

Undo Changes

While adding a new communication record or modifying an existing record, additions are undone or changes are restored to their previous values by clicking the *Undo* button. All new and edited data fields are restored to their previous value and the screen returns to the *View* mode. Once a record is saved, changes cannot be undone using the *Undo* button.

Deleting a Communication Record

To delete a communication log record, select a record from the list and click the *Delete* button. The system prompts the user with “Do you want to delete this record?” Click the *Yes* button to delete the record or click the *No* button not to delete it. If a communication record associated with a complaint is deleted, then the complaint is also deleted in the *Complaints* module.

Search Options

An advanced search function is provided at the bottom of the screen. Records can be searched By Client, By Employee, By keyword in the task field, and by Date Range. These constraints can also be used in combination with each other. For example, a search can be initiated for records that contain a selected client and a selected employee and a typed keyword between two chosen dates. As soon as a client or employee is selected a new search is initiated and records are displayed in the record list. Also, the Search button can be clicked to initiate a search which uses all entered constraints. Additionally, there are view constraints which can be selected to display only "Not-Completed" records or "All" records regardless of completion status. If constraints are entered when the "Not-Completed" flag is checked, then all "Not-Completed" records with the constraints will be displayed. Once constraints have been entered, then these constraints can be removed one by one to broaden the search or can be cleared out by clicking the *Clear* button to show all records.

Communications Log Report

To print a communications log report, click the *Preview CommLog Rpt* button at the top of the *Communications Log* screen. Print the report by clicking the *Print* button on the Print Preview ribbon above the application. Close the report by clicking the *Close Print Preview* button on the ribbon. Alternatively, click the *Reports* button and then the *Communications Log* button on the Reports screen.

Closing the Report

To close the *Communication Log* screen, click the *Close* button. If there are additions or changes that have not been saved, then the system prompts the user, “Do you want to save changes?”. Click the *Yes* button to save changes or the *No* button not to save changes.

Change Sort Order

The default sort order of the Client Communication Record List is Communication Date descending order. To sort the list by Communication Date, click the "Sort by Comm Date" button which will have a label that indicates whether it will sort by descending or ascending order.

Chapter 14 Follow-Up List and Follow-Up Planner

Follow-up reminders specific to a client or employee can be created via the **Follow-Up** Module. A planner provides follow-up reminders specific to a client. Click the *Follow-Up* button at the top of the *Client Information* screen to get to the *Follow-Up List* screen. The *Follow-up List* screen lists all the follow-up reminder records for a selected client. These records are reminders to follow-up with a client at a specific date about a specific topic. Since the list can become lengthy, there are filter constraints that can be checked off at the top of the form to limit the list.

Creating a Follow-Up Reminder

To create a new follow-up record, click the *New* button at the bottom left of the *Follow-Up List* screen. The *Follow-Up Planner* screen pops up for data entry.

Follow-Up Reminder Field Definitions

Data can be entered in the following fields:

- Client:* (Required) Select the client with which to follow-up. This field is automatically filled in with the currently focused client.
- Follow-up In:* (Required) Numerical entry specifying the number of days, weeks, months or years in which to follow-up.
- Period:* (Required) Period in days, weeks, months or years associated with the *Follow-up In* data field.
- Employee Responsible:* Employee responsible for the follow-up.
- Purpose:* (Required) Brief description of the purpose for the follow-up.
- Follow-Up Note:* More detail for the follow-up.
- Completed:* Check this flag if the follow-up has been completed.

Click the *Save* button to save the follow-up record. Click the *Close* button to close out the Follow-Up Planner.

Modifying a Follow-Up Record

To modify a follow-up record, select a record from the Follow-Up List on the *Follow-Up List* screen and click the *Modify* button. The *Follow-Up Planner* screen pops up in the *Modify* mode. Make any changes to the data and click the *Save* button. Click the *Close* button to close out the Follow-Up Planner.

Viewing a Follow-Up Record

To view the details of a follow-up record, double-click a record in the Follow-Up List. The Follow-Up Planner opens. At this point you can view the follow-up details, modify the record or add new follow-up records.

Deleting a Follow-Up Record

To delete a follow-up record, select a record from the follow-up list on the *Follow-Up List* screen. Click the *Delete* button. The system prompts the user to verify the deletion by asking, “Are you sure you want to delete this Follow-Up record?”. Click the *Yes* button to delete the record or click the *No* button to cancel the deletion.

Alternatively, double-click on a record in the follow-up list. The Follow-Up Planner pops up. Click the *Delete* button on the Follow-Up Planner to delete the record.

Change Sort Order

The follow-up list can also be ordered by LastName, Follow-Up date or Employee in an ascending or descending order. These fields are highlighted in a light blue color.

Search Options

An advanced search function is provided at the bottom of the screen. Records can be searched By Client, By Employee, By keyword in the task field, and by Date Range. These constraints can also be used in combination with each other. For example, a search can be initiated for records that contain a selected client and a selected employee and a typed keyword between two chosen dates. As soon as a client or employee is selected a new search is initiated and records are displayed in the record list. Also, the Search button can be clicked to initiate a search which uses all entered constraints. Additionally, there are view constraints which can be selected to display only "Not-Completed" records or "All" records regardless of completion status. If constraints are entered when the "Not-Completed" flag is checked, then all "Not-Completed" records with the constraints will be displayed. Once constraints have been entered, then these constraints can be removed one by one to broaden the search or can be cleared out by clicking the *Clear* button to show all records.

Follow-Up Report

Click the *Preview FollowUp Report* button on the *Follow-Up List* screen to display a report of the follow-ups listed on the screen. The report can be printed by clicking the *Print* button on the *Print Preview* ribbon at the top of the application. To close the report, click the *Close Print Preview* button. Alternatively, click the *Reports* button and then the *FollowUps* button on the Reports screen.

Chapter 15 Scheduling

From the main menu or **Client Information** screen, open the *Scheduler* Module. The scheduler opens to the schedule for the default employee as defined in *System Info* or to the first employee in the list at the top of the scheduler. The employee schedule is shown for Today's date by default. The schedule is shown in 15 minute increments. To focus on the schedule on a particular day, select the day from the calendar at the top right of the scheduler. That Days Appointments will appear. To select a schedule for a different employee, select the employee from the "Appointments for Employee" list at the top of the scheduler and then that Employee's Appointments will appear for the selected date.

Adding Appointments

An appointment is added by clicking on the *New Appt* button at the bottom of the screen or double clicking on a time slot. The *Appointment Detail* popup is displayed. From this screen the client for whom the appointment is scheduled, the employee for whom the appointment is made, the appointment date, start time and appointment duration are entered. Hot buttons are associated with the employee and client entry fields so that client and employee detail information can be viewed or new client or employee information can be entered.

For appointments not associated with a client (e.g.; lunch, internal meeting, vacation, etc.), a block of time can be identified by clicking the *Block Time* button. Enter a subject for the blocked time.

Notes regarding any details of the appointment are added in the Subject section.

After all data is entered, click the *Save / Close* button which closes out the Appointment Detail screen and brings you back to the master *Scheduler* screen.

Generating Work Orders

From an existing appointment, a work order can be generated. This work order is a convenient feature to communicate the appointment information to the employee and to document any work performed against that appointment. The work order is automatically generated with client and scheduling information filled in by clicking on the *WO* button adjacent to the schedule time line for the chosen appointment.

Employee Appointments Report

By clicking on the *Appointments Report* button at the top left of the main Scheduler screen, the Appointment Constraints filter popup is displayed. The filter allows for the selection of a particular employee or all employees, a date range or all dates, and a start and end time or all times. Once the constraints, if any, have been selected, click the *Preview Rpt* button to generate the report. The Appointments report can be printed by clicking the *Print* button on the Print Preview ribbon. It can be exported to Excel by clicking on the *Export to XLS* button on the Appointment Constraints filter popup.

Appointment Search

By clicking on the *Appointment Search* button at the top left of the main Scheduler screen, the *Appointment Search* popup screen opens. Search for the desired client by entering the client's last name or primary phone. The use of wildcards is permitted. The appointments found for a selected

client are displayed in the Appointment Search popup. Each time slot on the Appointment Search popup contains a hot button at the far right that is used to open that selected appointment. Click on the Go To *Appt* hot button on the far right to open that appointment record.

Deleting an Appointment

Select the appointment time slot on the main Scheduler and click the *Modify or Delete Appt* button at the bottom of the main Scheduler screen. The Appointment Detail popup screen will be displayed for the selected appointment. Click the *Delete Appt* button to delete it (i.e., cancel appointment) from the schedule. The Scheduler will verify if you really want to cancel the appointment. Click 'Yes' to cancel the appointment and 'No' to exit the deletion process. The Appointment Detail popup screen automatically closes after deletion.

Chapter 16 Generating and Exporting Reports

Since *Universal Client CRM Multi-User* is a database system, all the information and data can be easily compiled and assembled into reports for preview, printing or exporting.

From the main menu, open the **Reports** Module. The *Reports* screen shows four categories of reports; Database Listings, Misc., Sales Information and Financials. The following reports are available under the respective categories. Click the report buttons for the desired report. When opening the desired report with associated filter criteria, a pop-up filter screen will present the available filter criteria. If no criteria are selected the report will default to the value which initially appears in the field or all appropriate records will be listed in the report.

Database Listing Reports:

- Employee Listing
- Parts Listing
- Suppliers Listing
- Locations Listing

Client Reports

- Client Directory
- Client Info
- Communications Log
- Complaints
- Follow-Ups

Deal Reports

- Deals By Month
- Deals By Employee
- Deals By Stage

Sales Information Reports

- All Sales Summary (With/without employee name, Date range)
- Sales By Client (Client name, Date range, detailed or summary)
- Sales By Part (Part number, Client name, Date range)
- Sales By Part Totals (With/without employee name, Date range)
- Estimate Summary (Employee name, Client name, Date range)
- Estimates (Client name, employee)
- Sales Orders (Client name, Status)

Misc. Reports

- Appointments
- General ToDo List

Select a report from the report screen by clicking on the desired report button. A select (filter) criteria popup screen opens, allowing the report to be generated constrained by the criteria entered in the popup filter. Depending on the report, examples of selection (filter) criteria are client name, date ranges, part numbers, and status (pending, open, closed, active/ inactive). After selecting the filter criteria, the report can be previewed and printed. Click the *Preview Report* button to generate the report.

When launching reports from the *Client Information* screen, the current client, for whom the record is opened, will be displayed in the client selection screen. Other clients can be selected from the client drop down list from the respective report's Client drop down list. When launching reports from the main menu, the client will need to be selected from the respective report's Client drop down list.

By default, only active clients are displayed in the Client drop-down box. To run reports for inactive clients, either enter the reports screen from the client information screen or click on the "Show All Clients" checkbox. This will display all clients, both active and inactive, in the client drop-down list.

Closing, and Printing Reports

When a report is generated, it opens with the Print Preview ribbon displayed at the top of the screen. To close the report, click on the *Close Print Preview* button located at the right of the ribbon. The system maximizes the ribbon if it is in a minimized state. If the ribbon does not open with the *Print Preview* tab then select it from the ribbon.

Reports can be printed by clicking on the *Print* button on the left side in the Print Preview ribbon. When a report is closed, the ribbon is automatically minimized.

Export Reports to PDF

Reports can be exported to a PDF formatted file by clicking the PDF button on the right side of the *Print Preview* ribbon. Click the button and a *Publish as PDF* popup window will be displayed. Select the directory and name of the file to which to save the report. Click the *Publish* button to create it. If this PDF add-on is not available with your installation of windows, then you can download the “2007 Microsoft Office Add-in: Microsoft Save as PDF” add-on from the Microsoft Download Center.

Export Reports to Microsoft® Excel®

Reports can be exported into a Microsoft® Excel® format by clicking the *Export to XLS* button, associated with each report. To export reports from the **Reports** screen, click any button on the screen to display a criteria selection filter popup. The *Export to XLS* button is located on the lower left side of each filter popup screen. The Microsoft® Office *File, Save* window pops up pointing to the default location on the computer. The default pathway is user defined in the main menu **System Administration** module under the *System Info* feature. To change the directory pathway, select the location through the Microsoft® Office *File, Save* window. Optionally, change the name of the report. Click the *Save* button.

Chapter 17 Setting up Foreign States

The standard list in the State drop-down box which appears in the Client Information, Employees, Suppliers, and Locations screens default to a US states listing. This drop-down can be customized for foreign users by deleting the US states and entering foreign states, provinces or regions. If a state is typed into the State drop-down which is not in the list, then the system will prompt the user if to add the new state/province/region to the list. If the user clicks “Yes”, then the state/province/region is entered into the list.

Alternatively, the states list can be more formally managed from the “System Administration” screen. Click on System Administration, then click on “System Info”. Click on the “States” button in the “Drop-Down Lists Data Management” area. A States popup screen comes up. Add a new state/province/region by clicking the “New” button and adding the state. Delete a state from the list, one at a time, by selecting the state from the list and clicking the “Delete” button. This can be done once, during setup to the system and available in all State/Province/Region drop-down lists from that point on.

Chapter 18 Microsoft Outlook and Skype Support

Universal Client version 3.0 includes built-in support for Microsoft Outlook email and Skype. Buttons will appear next to filled-in phone numbers that allow Skype to be dialed (if Skype is already installed on your computer). Also, Outlook icons will appear on screens that bring up Outlook email. If a client's email address is filled in, then it will automatically bring up Outlook with the defined client email address. Both Outlook email support and Skype are automatically enable in the application.

To disable Microsoft Outlook Email Support within Universal Client, click the System Administration button on the main screen, click the System Info button in System Administration, click the Modify button at the bottom of the System Information screen, click the "Disable Microsoft Outlook Email Support" checkbox on, and click the Save button at the bottom of the screen. When email support is turned off, Outlook Email icons will not appear in Client Information, Follow-Up Tasks, Master Activity Log, Client Communications Log, Deals, Sales Order , and Complaints screens.

In order to prevent problems that may hang the application, Microsoft Outlook email must be fully setup on your computer in order to use this function. If there are any problems using this function on your computer, turn Outlook support capability off within System Info.

To disable Skype support within Universal Client, click the System Administration button on the main screen, click the System Info button in System Administration, click the Modify button at the bottom of the System Information screen, click the "Disable Skype Support" checkbox on, and click the Save button at the bottom of the screen. When Skype support is turned off, Skype buttons will not appear in Client Information and Scheduler screens.

Chapter 19 Sales Tax and Credit Card Information

Sales Tax Table

The sales tax table can be customized to include sales tax rates for different states. The sales tax table can be invoked from the *Parts/Services* module or the *Sales Order* module by clicking the *Sales Tax Table* button. Sales tax rates can be associated to states via this table. Multiple records can be created for each state with different sales taxes for different counties, cities, etc. The data fields are:

<i>Sales Tax Name:</i>	The state descriptor with the associated sales tax. <i>(Required)</i>
<i>Sales Tax:</i>	The sales tax percentage. <i>(Required)</i>
<i>Description:</i>	The description of the sales tax record. Additional information indicating that this sales tax is for a particular county or city in the state can be entered.

To create a new sales tax record, click the *New* button. Enter data and click the *Save* button. The Sales Tax Name can be any descriptor such as “IL” for the state of Illinois. For example, multiple sales tax entries for Illinois can be created with descriptors such as, “IL-Cook” and “IL-Will”. The descriptors are chosen by the user and do not need to be state designations. To enable the Sales Tax Name entry, the “Taxable” check box must be checked on the *Part/Service Information* screen. This will enable the Sales Tax Name entry area. Unchecking the “Taxable” check box will blank out the Sales Tax Name area and disable it.

If a part / service item has the “Taxable” box checked, the sales tax associated with the part / service will appear in the Part Name drop-down box in the *Sales Order* screen and the tax will automatically be entered into the tax field on the sales item line. If the “Taxable” box is not checked, no sales tax will be displayed in the Part Name drop-down box in the *Sales Order* screen.

To modify an existing sales tax record, select the sales record from the list and click the *Modify* button. Make the desired changes and click the *Save* button.

To delete a sales tax record, select the sales record from the list and click the *Delete* button. The system verifies the deletion by asking, “Are you sure you want to delete the selected sales tax record?”. Click the *Yes* button to delete the record or click the *No* button to cancel the deletion.

While adding a new sales tax record or modifying an existing record, additions are undone or changes are restored by clicking the *Undo* button. All new and edited data fields are restored to their previous value and the screen returns to the *View* mode. Once a record is saved, changes cannot be undone using the *Undo* button.

To close the screen, click the *Close* button.

Chapter 20 Back-up and Restore

Backing Up Data

Universal Client CRM Multi-User saves all the data entered via the application in a separate database file. Every time the system is used and new data is entered, it is recommended that the database be backed up. *Universal Client CRM Multi-User* offers built-in backup and restore functions under *System Administration*.

To enable the auto backup function, go to the *System Administration* Module from the main menu, then click the *System Info* button. In the *System Info* screen click the *Modify* button. Check the *Enable Auto Backup* checkbox. Optionally, enter the directory path to which you want to backup the *Universal Client* database. The directory path format should be similar to C:\BackupDirectoryName or C:\YourOrganizationName\Backups, etc. If no backup directory is entered, then the system defaults to the logged-in user's "My Documents" folder. Click the *Save* button on the *System Info* screen when done. Once this option is selected, the system will prompt you whether to backup the database file every time you close the application. Click the *Close* button to close the application on the main *Universal Client CRM Multi-User* screen and the system asks "Do you want to create a backup?" Click the *Yes* button to create a backup of the database with all the latest data. Click the *No* button to bypass the backup and close the application.

The backup function copies the *Universal Client* database file which holds all data entered via the application to the specified directory location established above. It is recommended that *Universal Client* be backed up to an external drive in the event the system hard drive crashes or the system becomes corrupted. The data can be easily restored by using the restore function to copy the backed-up database file back into the database installation folder.

Alternatively, data can be backed up by clicking the "Backup Database" button on the *System Administration* screen. The system will ask the user whether to create a backup. Click the *Yes* button. The file selection window will pop up. The system recommended database backup file will be automatically named. Either accept the suggested file name and click the *Save* button or modify the backup name and click the *Save* button. This process will make a backup copy of the *Universal Client* database file to the selected folder.

Restoring Data

The backed up database file can be restored to the *Universal Client CRM Multi-User* application by the restore function. To do this, click the "Restore Previous Database" button on the *System Administration* screen. The system will prompt the user with "Do you want to restore a previous version of the database?" Click the *Yes* button. The file selection popup will appear. The file selection popup will point to either the backup folder specified in "System Administration/System Info" backup file location or to the logged in user's personal "My Documents" folder. Select the backed-up database file or search for it via the file selection popup. Click the "Restore Selected File" button to start the restore process. The system will prompt the user with "The folder already contains a file named UniversalClient_DB.accdb. Would you like to replace the existing file?" Click the *Yes* button to complete the restoration.

Alternatively, the backed up database file can be restored manually. This is NOT recommended. The backup file name must be renamed to the same *Universal Client* database file name originally saved into the database installation folder. For *Universal Client CRM Multi-User*, the file containing your data is named "UniversalClient_DB.accdb".

Chapter 21 Importing or Exporting Data into *Universal Client CRM Multi-User*

Importing Data in Comma Delimited Format

Universal Client Sales Manager Pro will import client and part / service data structured in a .csv comma delimited format. The file format is typically saved from an Excel spreadsheet. Client Information and Parts / Services Information are two types of data that can be imported. Because the import function maps data fields from the imported .csv file to specific designated data table fields within Universal Client Sales Manager Pro, it is important that the original import file format be structured according to the following rules:

- 1) Import data must be formatted in a comma separated text file where each column of import data is separated by a column. (Suggestion: Use Microsoft Excel to prepare the import data records and save the file as a “csv” data type.)
- 2) Client import data must not contain more than 25 data columns. The import function will stop import if there are more than 25 client data columns. See Table 1: Import Data Column Format or the required data import structure.
- 3) Part / service import data must not contain more than 6 data columns. The import function will stop import if there are more than 6 part / service columns. See Table 1: Import Data Column Format or the required data import structure.
- 4) Blanks and commas are permissible in the data fields. Text fields with commas embedded in the string must be in quotes.
- 5) The first row of the import data file must contain the field names of the data columns and will be ignored and not imported as data into the Universal Client data tables.
- 6) The .csv import filename must only contain a single period in its filename, immediately prior to the file extension.

INCORRECT: Client.File.csv

CORRECT: ClientFile.csv

To import the database tables, open the System Administration Module from the main menu. Click on the desired button; Import Clients from Text File or Import Parts from Text File. A file selection dialog will open. From the dialog box, highlight the file to be imported, and then click on the Import Selected File button. A view of the imported data will be displayed. Delete any records from the import list that you do not want to import. Finally, if the data appears to be all there and correctly placed in the correct columns, click on the Import button at the bottom of the form to save the information to the Universal Client data table.

Importing and Exporting Data to Microsoft Outlook

Contacts in Microsoft Outlook can be imported into Universal Client Sales Manager Pro as clients. Any contacts in Microsoft Outlook that have either a business phone number, home phone number, mobile phone number or email address that matches any primary phone number, secondary phone number, cell phone number or email address in Universal Client "client" records will be filtered out and NOT imported into Universal Client as client records. To import Microsoft Outlook Contacts, open the System Administration Module from the main menu. Click on the Import Contacts from Microsoft Outlook button. A view of the imported contacts data will be displayed. Delete any records from the import list that you do not want to import. Finally, if the data appears to be all there and correctly placed in the correct columns, click on the Import button at the bottom of the form to save the information to the Universal Client data table.

To export clients from Universal Client Sales Manager Pro into Microsoft Outlook "contacts", open the System Administration module from the main menu. and click on the Export Clients to Microsoft Outlook Contacts button. The export process will begin with progress being indicated by the progress bar at the bottom of the screen. The export process may take several minutes based on the size of the database and contacts list in Microsoft Outlook. Universal Client Sales Manager Pro client records with a primary phone number, secondary phone number, cell phone number or email address that matches any Microsoft Outlook Contact business telephone number, home telephone number, mobile telephone number or email address will not be imported into Microsoft Outlook.

Chapter 22 Setting up Users and Passwords

In order to enable access control to *Universal Client CRM Multi-User* by username and password, go to “System Administration”, click the System Info button, Click the Modify button at the bottom of the screen, click the “Enable User Login / Security” checkbox and click the Save button.

Thereafter, when invoking *Universal Client CRM Multi-User*, the system will prompt the user with a login popup screen where the user must enter the username and password in order to gain entry into the application. Also, once access security is enabled, the “System Info”, “Import Client from CSV”, “Import Parts from CSV”, “Backup Database”, “Restore Database”, “Change Database Location”, “Add/Edit Username”, and “Change Login Password” buttons in the “System Administration” screen will be restricted to access by the “admin” user account only. To disable access control, uncheck the “Enable User Login / Security” checkbox.

By default, the system has “Admin” and “demo” usernames automatically setup. To gain access to the system, enter “demo” for the username and no password for the password. To gain entry into the system as an administrator, login to *Universal Client CRM Multi-User* with username “admin” and password “admin”. Click the OK button to gain entry. Click Cancel to exit the system.

To add or edit a username, login to *Universal Client CRM Multi-User* using the “admin” account, click the System Administration button, and click the Add/Edit Username button. The Add/Edit Username popup screen appears. To edit a username (i.e., change the name of the username), select the username from the list, click the Edit button and modify the username in the “User Name” field. Click the Save button to save changes. To add a username, click the Add button and enter the username in the “User Name” field. Click the Save button to save the new username. To undo changes during either addition or modification click the Undo button. To delete a username, select the username from the list and click the Delete button. The “Admin” username is restricted and cannot be modified, added or deleted by the user.

To change the password associated with a username, click the “Change Login Password” button in the “System Administration” screen. The “Change Username Password” popup screen appears. Select the username from the list and enter the new password in the “New Password” field, and re-enter the new password in the “Confirm” field. Click the Change Password button to change and save the new password. Click the Close button to close the popup screen. Warning: the “Admin” username password can be changed. Do not forget the password or you will not be able to perform some of the administration functions.

If you forget the password to the “Admin” account, restore the database from your last backup. If no backup is available or is too old and therefore too much recent data would be lost, then the password can be reset by opening the back-end database (“UniversalClient_DB.accdb”) using a full version of Microsoft Access 2007. Open the “dbo_SecurityLogins” table in the back-end database by right clicking on the table shown in the list on the left and invoke the “open” selection. Blank out the password field associated with the “Admin” username. Exit Microsoft Access and open the *Universal Client CRM Multi-User* application. Login to the system using the Admin username with no password. Change the password for the “Admin” username using the utilities explained above.

Chapter 23 Change the Location of the Database File

To change the location of the back-end database file (“UniversalClient_DB.accdb”), copy the database file to the new location and then click the Change Database Location button in the “System Administration” screen. Select the new shared directory location where the “UniversalClient_DB.accdb file is located. Click the Select button to change the location or click the Cancel button to cancel the change.

Table 1: Import Data Column Format

Client Data
(Exactly 25 columns)

<u>Column</u>	<u>Description</u>
1	Lastname
2	Firstname
3	Middle Initial
4	Date of Birth
5	Alternate Record Number
6	Address
7	City
8	State
9	Zipcode
10	Country
11	Ship To Address
12	Ship to City
13	Ship to State
14	Ship to Zipcode
15	Ship to Country
16	SSN
17	Employee Identification Number
18	Primary Phone
19	Extension
20	Cell Phone
21	Fax
22	Email
23	Website
24	Employer
25	Notes

Import Data Format

Parts Data

(Exactly 6 columns)

<u>Column</u>	<u>Description</u>
1	Part Name
2	Part Number
3	Part Description
4	Part Size
5	Unit Price
6	Notes

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