ACTIVANT

Creating and Maintaining Contacts

Release 8.6.5 (Eterm)

Legal Notices

Activant® Eclipse™ 8.6.5 (Eterm) Online Help System

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Contact Maintenance Overview

Create contact records for people associated with your company, with customers, or with vendors. The contact file contains the following information for people with whom you do business:

- Phone number and fax numbers.
- E-mail and web page addresses.
- Credit information.
- An Activity Log.
- Work order parameters.

View customer or vendor records associated with a contact from the contact record, or view contacts associated with customers or vendors from the customer or vendor records.

Displaying Contact Maintenance

Access the Contact Maintenance screen directly from the Files menu, or from within a customer or vendor record. When you create a contact, the system assigns an internal ID for that record, as it does with all entity records. The ID displays in the top right border of the screen.

This page contains the following procedures:

- Displaying Contact Maintenance from the Files Menu
- Displaying Contact Maintenance from the Customer or Vendor Menu

Displaying Contact Maintenance from the Files menu:

1. From the **Files** menu, select **Contact** to display the Contact Maintenance screen.
2. In the **First Name** field, do one of the following:
   - Enter a period (.) followed by the system internal contact ID to display the contact record.
   - Enter the contact's first, last, or middle name, a token from the **Sort By** field on the contact record, or at least the first two letters of one of the names or tokens to display a list of matching names.

   A list containing the option **New** and the names of each contact record that matches the spelling of your entry displays.
3. Do one of the following:
   - To enter a new contact, select New and press **Enter**.
   - To display an existing record, select the record to view and press **Enter**.
   - To view a list of contacts associated with a customer or vendor, enter a slash (/) followed by all or part of the customer or vendor name, or enter a slash period (/.) followed by the customer or vendor number.

Displaying Contact Maintenance from Customer or Vendor Maintenance:

1. From the **Files** menu, select **Customer** or **Vendor** to display the Customer Maintenance screen or the Vendor Maintenance screen.
2. Use the **Contact** hot key to display the Contact Display Options screen.
3. Select from the following:
   - **Show Only Contacts For This Entity**
   - **Show All Contacts For All Related Entities**

   A list containing the option **New** and each contact associated with that customer or vendor displays.

4. Do one of the following to display the Contact Maintenance screen:
   - To enter a new contact name, select **New** and press **Enter**. A blank Contact Maintenance screen displays.
   - To view an existing contact, select the contact's name from the list and press **Enter**.

Entering Contact Information

The contact record contains information on people with whom you do business, such as phone number, fax number, and e-mail address. Create contact records for people associated with your customers and vendors. The system stores contact records as part of a customer or vendor record to aid in searching for those individuals that you enter as contacts.

To enter contact information:

1. Display the Contact Maintenance screen.
2. In the **First Name** field, enter the contact's first name.
3. In the **Middle** field, enter the contact's middle name or middle initial, as needed.
4. In the **Last Name** field, enter the contact's last name.
5. In the **Sal** field, press **F10** and select the salutation that applies to this contact. Salutations are defined in the Valid Salutations control maintenance record.
6. For the contact's mailing address do one of the following:
   - In the **Use Entity Address** field, enter an asterisk (*) to use the customer or vendor address listed in the **Entity** field.
   - In the **Address** field, enter the contact's mailing address, if different from the entity's address, in the fields provided.
7. To enter additional customers or vendors with which this contact is associated use the **Add'l Entities** hot key. This is useful for de-centralized large customers who may have many bill-to accounts and the contact associates with all of these accounts.
8. In the **Sort By** field, enter the most significant word of the contact name or any combination of numbers and letters, up to 15 characters, as tokens for the system to sort.
9. In the **Title** field, enter the contact's job title, such as "Receptionist" or "Showroom Salesperson."
10. In the **Classification** field, press **F10** and select this contact's primary work area. Use the **Classify** hot key to enter additional classifications.

    Contact classification is defined in the Valid SFA Contact Classifications control maintenance record.
11. In the **Phone** field, enter one or more telephone or fax numbers for this contact.
12. In the **Codes** field, press **F10** and select the code that describes the type of phone number, such as **Fax** or **Cellular**. Phone codes are defined in the Valid Phone Codes control maintenance record.
13. In the **Description** field, enter a description of the selected code, if needed, for example, where each phone or fax machine is located, such as office phone, lab phone, home phone, car phone, office fax, or home fax.

14. Use the following hot keys, as needed:

Hot Key	Function
Add'l Data	This screen is user-defined for your company.
Delete	Deletes this contact record. and prompts you to confirm the deletion.
Log	Displays the Maintenance Log Viewing screen, which shows the history of changes made to this contact record.
Entity	Displays the customer or vendor record associated with this contact.
Credit Card	Enter or view credit card information for this contact.
WWW	Enter e-mail and internet information for this contact.
WOE	Enter web order information for this contact.
Classify	Enter multiple classifications. See step 10, above.
Keywords	Enter keywords the system uses to search for this contact. The hot key is highlighted when keywords have been entered.

15. Press **Esc** to save the settings and exit the screen.

Assigning SFA Access to Entities

Define user message groups who can access the following data using the Eclipse Sales Force Automation (SFA) companion product from a laptop or Palm computing device:

- Customer Maintenance
- Vendor Maintenance
- Contact Maintenance
- Eclipse Dictionary Maintenance

Set different levels of access granted to each ID, depending on your security needs.

To assign access to an entity:

1. From the **Files** menu, select one of the following:
    - **Customer** – Displays the Customer Maintenance screen.
    - **Vendor** – Displays the Vendor Maintenance screen.
    - **Contact** – Displays the Contact Maintenance screen.
    - **Eclipse Dictionary** > **Dictionary Maintenance** > **Access** hot key – Displays the Dictionary Maintenance screen.
2. Enter an entity or dictionary ID to display the record.
3. Use the **Access** hot key to display the Access Control List screen.
4. Select the first blank line and enter the new user or message group ID, or press **F10** and select it from a list.
5. In the **Levels** field, enter one of the following activity levels:

Activity Level	Description
No Access	You cannot download information from this record to your laptop or Palm device. If you have access to a message group ID, use this option to deny access to users within that group. This level overrides any other levels assigned to the individual User IDs.
View Only	You can download information from this record to your laptop or Palm device, but you cannot make changes to the information.
Review	You can download information from this record to your laptop or Palm device and make changes to the information, but you cannot update the Eclipse database. The system creates a tracker with the changes and sends it to the user ID entered in the SFA Administrator control maintenance record.
Full Access	You can download information from this record to your laptop or Palm device, update the information, and sync it with the Eclipse database.

Note: To delete a user or group, select it and press **Alt-Delete**.

6. Press **Esc** to save your settings and exit the screen.

Defining Default Credit Card Information

Enter a customer's default credit card information so the information is available when customers place orders. The setting on the **Validate Name in 'Ordered By' Field Against Customer Contact** control maintenance record determines whether the contact has authorization to place a credit order for the company.

If you do not have the CREDIT.CARD.ACCT authorization key set to at least level 16, you cannot view the credit card number on the Default Credit Card Information screen.

You cannot add credit card information to a customer account set up as a branch cash account or to customer records that have the **Do NOT allow Credit Cards to be saved to this account** field in the Additional Customer Credit Data screen set to **Y**.

On the Default Credit Card Information screen, you can:

- Determine when to authorize a customer's credit card payment in the course of an order.
- Enter term codes that override payment terms set up in Term Code Maintenance for customers.
- Determine if sales tax is applied when the customer pays for an order with this credit card.
- Define as many credit cards as needed for any customer.
- Set up credit cards for contacts. For example, the system applies this credit card information to any purchases made by a specific contact at one of your customer sites.

To define default credit card information:

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen, or **Contact** to display the Contact Maintenance screen.
2. Enter the customer or contact name to display the entity's record.
3. Do one of the following to display the Default Credit Card Information screen:
   - From a customer record, select the **Credit** hot key to display the Credit Control Parameters screen. Then Use the **Default Credit Card Info** hot key.
   - From the **Files** menu or from an entity record, select **Contacts** to display the Contact Maintenance screen. Then use the **Credit Card** hot key.
4. Press **Enter** to select **New**, or select an existing credit card record.
5. Enter the following credit card information, as needed:

Field	Description
Card #	Enter the 16-digit credit card number.
Card Type	Press **F10** and select the credit card type, such as *DS* for Discover.
Exp Date	Enter the credit card's expiration date.

Field	Description
Card Holder	Enter the name of the card holder, which is printed on the credit card. Credit card types are defined in the Valid Credit Card Types control maintenance record.
Zip Code	Enter the five-digit or zip + 4 zip code for the card holder.
Street Addr	Enter the street address for the card holder.

6. In the **Auth Method** field, press **F10** and select one of the following authorization methods. This method displays in Sales Order Entry when the card used for payment.

    - **Pre-Authorize Before Shipment –** Sets money aside from the credit card, guaranteeing funds for the order total plus any freight charges, without transferring the money to your account. Then once the order is final, either the Credit Card Authorization Phantom or the automated shipping program collects the payment.

      Potential charges from your credit card processor may apply if you pre-authorize payment from a customer.

    - **Authorize Before Shipment –** Authorizes and transfers payment to your account for the order amount before shipping. The pick ticket is printed upon authorization.

    - **Reference Only –** Uses information on the Credit Card Authorization screen for reference only at the order level.

    - **Authorization After Review –** Authorizes and transfers payment to your account for the order amount once the invoice is sent through batch printing and the shipping ticket is printed.

    Note: The authorization method for new cards defaults to the setting stored in the Default Auth Method for New Cards control maintenance record.

7. In the **Terms Override** field, press **F10** and select the terms code, if any, to use when this credit card is used for payment.

    For example: If you give the customer a discount to orders when they pay in cash, but discounts do not apply when they pay with a credit card, enter the term code to override the discount.

8. In the **Charge Tax** field, enter:

    - **Y –** Applies tax to orders paid with this credit card. For example, customers could be exempt from tax if they pay with a company credit card. If you want to charge tax to payments made with such credit cards, enter **Y**.

    - **N –** Does not apply tax to orders paid with this credit card.

9. In the **Default Ref No** field, enter a default reference number the system should use for this customer. The default reference number can be any of the following:

    - Release Number

    - Customer P/O

- Invoice Number

Set a default reference number for the system in the Credit Card: Default Reference Number control maintenance record.

10. Use the following hot keys as needed.

Hot Key	Description
Add'l Info	Displays the Additional Information screen. Use this screen to include additional credit payment data about the customer. This information does not directly affect any other part of the system and is displayed for informational purposes only.
Delete	Deletes this default credit card information. For example, if a customer changes credit card companies, you can delete the credit card information from the system.

11. Press **Esc** to save the information, and return to the previous screen.

Entering User-Defined Data for Entities

Use the User Defined Data screen to enter additional user-defined information about a customer, vendor, or contact. This information is usually detailed or personal data that you learn about the company or contact in the course of doing business.

Examples of user-defined customer data:

- Number of Employees
- Buying Group
- Association
- Competitors

Examples of user-defined contact data:

- Birthday
- Years employed at this company
- Spouse's name
- Hobbies

The system stores customer, vendor, and contact user-defined data in the following user-defined files:

- CUST.CLASS
- CUST.GROUP
- VEND.CLASS
- CONTACT.CLASS

To limit which user-defined fields display on the User-Defined Data screens, complete the following control maintenance records:

- Customer Classification Sort List
- Vendor Classification Sort List
- Contact Classification Sort List

For more information, see the Creating User-Defined Files.

To enter user-defined customer, vendor or contact data:

1. From the **Files** menu, select **Customer**, **Vendor**, or **Contact** to display the maintenance screen.
2. Enter the entity name to display the customer, vendor, or contact record.

3. Use the **Classify** hot key to display the User Defined Data screen. The system populates the following fields with:
   - **File Name –** The system file name containing the user-defined prompts listed on the screen.
   - **Desc ID –** The entity for which this screen is displayed.
   - **Prompts –** The field names for which you enter data. If completed, the control maintenance records listed above determine the field order in which the prompts appear on the screen.
   - **Category –** The SFA Category assigned to each prompt in Dictionary Maintenance. The system uses the category for selection and sorting purposes.
4. In the **Input** field for any of the items listed in the **Category** field, enter the value to store for this entity. If the field is validated, press F10 for a lists of possible entries.

   Notes: User-defined categories and validated input options are defined in Eclipse Dictionary Maintenance.

5. Use the **Sort** hot key to change the order in the field name list. Enter one of the following sort options:
   - **Default –** Sorts the field names in the order defined in the control maintenance record listed above, or alphabetically if the control maintenance record is blank.
   - **By Attribute –** Sorts the prompts by the attribute number assigned in Dictionary Maintenance.
   - **By Category by Prompt –** Sorts the prompts alphabetically by category, then within each category, alphabetically by prompt name.
   - **By Category by Attribute –** Sorts the prompts alphabetically by category, then within each category, by attribute number.
   - **By Prompt –** Sorts the prompts alphabetically by prompt name.
6. Use the **Category** hot key to filter the categories displayed in the list to only those associated with one or more SFA categories.
7. Use the **Log** hot key, as needed, to view all of the changes made to this screen.
8. Press **Esc** to save the settings and return to the previous screen.

Entering Internet and E-mail Information Overview

Access an e-mail address or web site without having to retype the address each time. By entering internet information into your customer or vendor records you have immediate access to Internet or e-mail communication. You can add the following Internet information to your customer and vendor records:

- Web site addresses
- E-mail addresses

Entering E-mail Information

Enter e-mail information in your customer or vendor records to e-mail customers or vendors without having to retype the address each time.

To enter e-mail information:

1. From the customer, vendor, or contact record use the **WWW** hot key to display the Internet Information Maintenance screen.
2. Enter a name in the **Customer**, **Vendor**, or **Contract** field, depending on which screen you display.
3. Use the **WWW** hot key to display the Internet Information Maintenance screen.
4. The **HTTP Document Address** and **Account Manager** fields are for internal Eclipse use only.
5. In the **E-mail Address** field, enter the e-mail address.

   If you use the Web Commerce companion product, use a unique e-mail address for this contact. If you enter the same e-mail address for the company and a contact within the company, then Web Commerce cannot respond if the user with that e-mail address submits a "Forget my password" request.
6. In the **Type** field, do one of the following to define a category for the e-mail address:
   - Press **F10** to select a defined e-mail type. E-mail types are defined in the Valid E-mail Types control maintenance record.
   - Enter a word that describes the e-mail address if no e-mail types have been defined. For example, you can describe an e-mail address as a contact's business e-mail address, or as a personal e-mail address.
7. In the **Pref** field, do one of the following to define the format to use to send e-mail messages to this customer:
   - Press **F10** and select an e-mail format preference. E-mail preferences are defined in the Valid E-mail Preference control maintenance record.
   - Enter a word that describes the e-mail format if no e-mail preferences have been defined. For example, you can send e-mail in HTML or in text format.
8. Press **Esc** to save the information and return to the previous screen.

Sending E-mail from Entity Records

You can conveniently send e-mail messages while working in a customer or vendor record.

To send an email message from an entity record:

1. From the customer, vendor, or contact record use the **WWW** hot key to display the Internet Information Maintenance screen.
2. Use the **Down Arrow** key to move the cursor to the e-mail address to which you want to send a message.
3. Use the **Send E-mail** hot key, and enter one of the following to the Create E-mail for All Addresses prompt:
   - **Y –** Sends an e-mail to all addresses listed in the **E-mail Address** field.
   - **N –** Sends an e-mail only to the selected address.

   The system displays the Send E-mail screen, with the selected e-mail address in the **To** field.

Entering Web Site Addresses

You can keep Internet information stored with customer and vendor records and easily access the customer or vendor web side from that record.

To enter a URL address:

1. From the customer, vendor, or contact record, use the **WWW** hot key to display the Internet Information Maintenance screen.
2. In the **WWW Address** field, enter the web site address of this customer, vendor, or contact.

   For example, enter **www. eclipseinc.com**.

To access the URL address that you have entered:

1. From the Internet Information Maintenance screen.
2. Click on the address, or use the **Link to WWW** hot key to launch your default browser and display the web site.

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