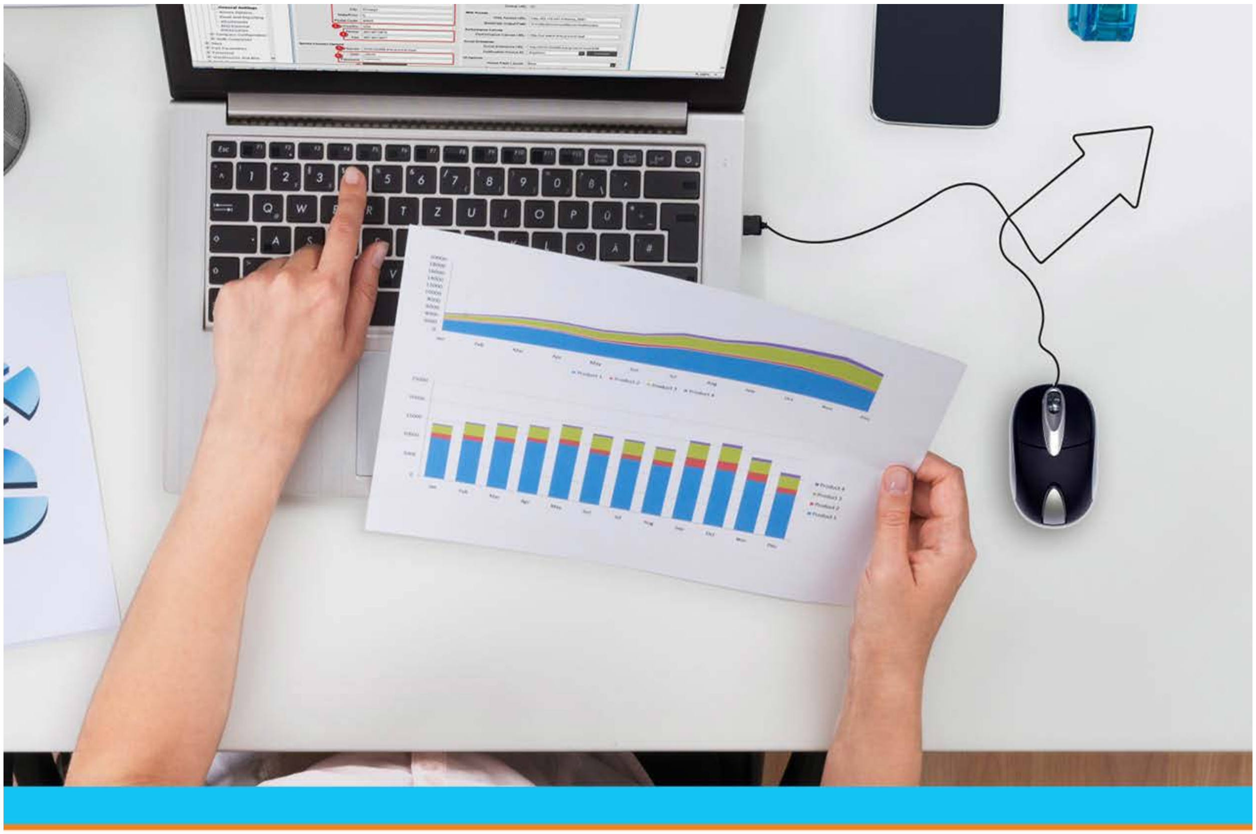

Creating and Maintaining Contacts

Release 9.0.6

Disclaimer

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Entity Maintenance Overview

Each customer, vendor, and branch must have its own record for pricing, reporting, and product information.

You can set up a variety of information in your customer and vendor records, including:

- Cross-references between the customer or vendor's product numbers and the system-generated part numbers.
- A list of contact numbers within the customer or vendor's company, such as those of purchasing agents, sales representatives, and accountants.
- Activity triggers that tell the system to send automatic email confirmations to customers when orders are shipped, or fax notifications to vendors when ship dates are missed.
- A way to determine which customers can order from which of your branches, and which of your branches can order from which vendors.
- The ability to receive or ship consigned inventory.

Each branch record contains information, such as:

- The customers and vendors that order from or sell to the branch.
- An assigned remit-to branch if a branch does not maintain its own finances.
- The credit card types that can be used.
- The method used to transport goods to and from the branch.
- The process used to verify checks.

Setup Requirements for Customer and Vendor Maintenance

Following are the control maintenance records and authorization keys used for Customer and Vendor Maintenance.

Only a system administrator is authorized to set control maintenance records and authorization keys.

This topic contains the following sections:

- Customer and vendor control maintenance records.
- Customer and vendor authorization keys.

Customer Control Maintenance Records

The following control maintenance records relate to Customer Maintenance:

ACCT (Accounting)

Set the following control maintenance records:

- A/P Over/Short Maximum Parameters
- Auto C/R Default Customer If Not Found
- Cash Over/Short Maximum Parameters
- Credit Card Default Reference Number
- Credit Card Level III Summary Line Item
- Default Auth Method for New Credit Cards
- Include Service Charges In Service Charge Calculation
- Maximum Collection Days Date
- Minimum Check Distribution Amount
- Restrict Access to Customer Maint Based On User Authorized Branches
- Valid ACH Formats
- Valid Cash Sources
- Valid Customer Statement Cycles
- Valid Invoice Select Codes

DLOT (Detail Lot Tracking)

- Valid Detail Lot Product Quality Ranks
- Valid Detail Lot QC Inspection Levels

EMAIL (E-mail)

- Corporate Customer
- Default E-mail Print Styles
- Valid E-mail Preference

- Valid E-mail Types

GENRL (General)

Set the following control maintenance records:

- Activity Trigger Subroutine Overrides
- Customer Classification Sort List
- Valid Customer Price Classes
- Vendor Classification Sort List

INVM (Inventory Management)

- Assign Demand Forecast To Price/Ship Branch Or By Zip Code

MAINT CUST (Customer Maintenance)

- Customer Maintenance Authorization Levels
- Customer Maintenance Authorization Levels For New Customers BT/ST
- Default Customer Price Class
- Default Customer Salesperson
- Job Lien Days By State
- New Customer Maintenance Template
- Prompt To Copy Tax Information From Bill-Tos to All Ship-Tos
- User Defined Customer Notes
- Valid Customer Invoice Status Codes
- Valid Customer Points Programs
- Valid Customer Select Codes
- Valid Customer Types
- Valid Job Types
- Valid Job Nature Types
- Valid Sale Categories

MAINT PROD (Product Maintenance)

- Valid Product Certification Codes
- Valid Product Zones

MAINT (Vendor Maintenance)

Set the following control maintenance records:

- Disable Home Branch Check In Vendor Maintenance
- User Defined Vendor Notes

- Valid Vendor Types

POE (Purchase Order Entry)

Set the following control maintenance records:

- Capitalize Tax On Purchase Orders
- Default B/O Days For Purchase Orders
- Include Directs In Vendor Target Check When Printing a P/O
- Vendor Freight Terms
- Valid Vendor ASL Types

SFA (Sales Force Automation)

- SFA Administrator

SOE (Sales Order Entry)

Set the following control maintenance records:

- Allow Multiple Products To Be Associated With One Customer Part #
- Allow Sending Credit Card Level 3 Data
- Apply Extra Handling For Shipping To First Gen Only
- Display Customers/Vendors Who Are Inactive At A Branch
- Display Products Within A Customer's Product Zones
- Duplicate Customer P/O Number Check
- Duplicate Order Check
- Enable Auto Routing On Creation Of Sales Order
- Exclude From Ship-To/Ship-From Selection If Excluded From Index
- Invoice Print Copies = 0, Q Status Invoices To Invoice Preview Queue
- Minimum Variance Before Last Price Reduction
- New SOE Customer Template
- Number Of Digits Of Accuracy For Product Weight
- Order Status Print Status Defaults
- Pass-Along Discount Holdback Percent
- Percent Of Order To Fill Before Automatically Shipping
- Prompt For Required Date In Sales Order Entry
- Use Last Price/Cost Logic
- Validate Name In 'Ordered By' Field Against Customer Contact
- Valid Product Matrix Types

TOE (Transfer Order Entry)

Set the following control maintenance record:

- Default Vendor Consignment on Transfers

WIP (Work Order Processing)

Set the following control maintenance record:

- Valid Vendor Work Order Process Codes

Customer and Vendor Authorization Keys

Set the following authorization keys:

- COGS.VIEW
- CONVERT.PROSPECT
- CREDIT.CARD.ACCT
- CREDIT.CARD.REQD.OVR
- CUST.CREDIT.EDIT
- CUST.BR.AUTH.ONETIME
- CUST.BR.AUTH.OVRD
- CUST.CERTIFY.EDIT
- CUST.DEMAND.BR.OVRD
- CUST.POINTS
- CUST.PRICING.EDIT
- CUST.TAX.VIEW
- CUSTOMER.MAINT
- CUSTOMER.MAINT.LEVEL
- ENTITY.PN.EDIT
- ENTITY.TRIGGER
- FREIGHT.TARGET.OVERRIDE
- INVALID.VEN.TYPES
- POE.ASL.RELEASE
- PRD.ZONE
- SLSMN.CUSTOMER.MAINT
- SOE.CREDIT.RELEASE
- VALID.VEN.TYPES
- VEN.BR.AUTH.ONETIME

- VEN.BR.AUTH.OVRD
- VENDOR.MAINT
- VENDOR.MAINT.LEVEL

Setup Requirements for Contact Maintenance

Following are the control maintenance records and authorization keys used for Contact Maintenance. Only a system administrator is authorized to set control maintenance records and authorization keys.

Control Maintenance Records

Set the following control maintenance records:

- Contact Classification Sort List
- Validate Name In 'Ordered By' Field Against Customer Contact
- Valid Phone Codes
- Valid Salutations
- Valid SFA Contact Classifications

Authorization Key

Set the following authorization key:

- CONTACT.MAINT

Setup Requirements for Branch and Territory Maintenance

Following are the control maintenance records and authorization keys used for Branch and Territory Maintenance.

Only a system administrator is authorized to set control maintenance records and authorization keys.

Control Maintenance Records

- Check Verification: Required Information
- Display Active Primary Index Products First In Product Search
- Restrict Access to Customer Maint Based On User Authorized Branches
- RF Pick Selection Sort
- Valid Cost Center Types
- Valid Phone Codes

Authorization Keys

- BRANCH.MAINT
- CREDIT.CARD.SETUP
- RF.LOAD.OVRD
- TERRITORY.MAINT

Setup Requirements for Company Branches

Creating a branch in the system involves several system program settings. You must set up branches as entities to track sales and expenses, and to use the branch in transfer orders. Generally, you create branches representing different physical locations, but you can also create a fictitious branch, such as *Corporate*, to maintain and track expenses that are not applied to inventory or pricing branches.

Complete the following to set up a branch:

- Set up control maintenance records and authorization keys for Branch and Territory Maintenance.
- Create a branch record and associate it with a customer record, so the branch activities can be tracked and you can use the branch for transfer orders. If this is a non-stocking branch and you will never order from this branch, activate No Order Entry in customer credit control parameters.

  Alternatively, you can specify a class for your transfer entities to accomplish the same purpose. For example, assign all branches a class of BRCH, and create a Class/All matrix cell.
- For each branch customer record for which you anticipate creating transfer orders, set up Customer/Group/All sell matrix cells so there is no gross profit percent calculated on transfer orders.
- Define territory authorization levels for users in User Maintenance. Determine a user's authority based on their assigned branches and how they need to use the system's territories.
- Set up customer and vendor access to branches with which your customers and vendors will do business.
- Create territories.
- Organize your branches into territories.

See Also:

Branch and Territory Maintenance Overview

Creating Branch Records

Creating Territories

Adding Branches to Territories

Contact Maintenance Overview

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

- 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 window directly from the **Maintenance** 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 bottom-left border of the Contact Maintenance window.

Displaying Contact Maintenance from the Maintenance menu:

1. From the **Maintenance** menu, select **Contact** to display the Contact Maintenance window.
2. In the **Contact** field, enter the contact's name to display the contact record, or enter new contact information.

Displaying Contact Maintenance from Customer or Vendor Maintenance:

1. From the **Maintenance** menu, select **Customer** or **Vendor** to display the Customer Maintenance window or the Vendor Maintenance window.
2. Click the **Contacts** tab, and then do one of the following:
   - Click the **Create New Contact** button to enter contact information for a new contact.
   - Double-click a contact listed in the **Name** column to display the contact record.
3. Save your changes and exit the window.

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, and. The system stores contact records as part of a customer or vendor record to aid in searching for contacts.

To enter contact information:

1. Display the Contact Maintenance window.
2. In the **Sal** field, select the salutation that applies to this contact. Salutations are defined in the **Valid Salutations** control maintenance record.
3. In the **First Name** field, enter the contact's first name.
4. In the **Middle** field, enter the contact's middle name or middle initial, as needed.
5. In the **Last Name** field, enter the contact's last name.
6. For the contact's mailing address do one of the following:
   - To use the entity's address for the contact, in the **Entity** area, enter an entity's name and select the **Use Entity Address** check box. In Sales Order Entry, when you enter a user ID in the **Ordered By** field, the system looks to this entry to populate corresponding the **Email Address** field.
   - In the **Address** area, 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 select **File > Additional Entities**. 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 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, select this contact's primary work area. Select **Classification Maintenance** to enter user-defined classifications.

    Contact classification is defined in the **Valid SFA Contact Classifications** control maintenance record.
11. On the **Phone List** tab, enter the contact's primary phone and fax numbers in the **Phone** column. For example, in the **Description** column enter **Fax1** for the primary fax number, and **Main** for the main office number.

    The system uses the first phone number in this list to populate the Sales Order Header with a contact number.

    Note: Use these tabs as a quick-reference list. This information is not directly connected to the information entered through the **Create New Contacts** button on the **Contacts** tab, where you add detailed contact information.
12. Click the **WWW** tab, and enter the contact's e-mail and internet information.

13. In the **Codes** field, 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. If you do not enter the fax code, faxed invoices, statements, and memos go to the main fax number.
14. 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.
15. Save your changes and exit the dialog box.

More Options for Entering Contact Information

The following are some common options you might use while entering contact information:

To...	Select...
enter additional user-defined information for your company.	**Information > Additional** **Note:** If prompted, log on to the character-based system.
delete this contact record.	**File > Delete** The system prompts you to confirm the deletion.
display the history of changes made to this contact record.	**File > Maintenance Log**
display the customer or vendor record associated with this contact.	**Information > Entity Maintenance**
enter or view credit card information for this contact.	**Information > Default Credit Card Information**
enter web order information for this contact.	**Information >Web Order Entry Information**
enter keywords the system uses to search for this contact.	**File > Keywords**

Adding Keywords to Search for Entities

In an entity record, enter additional words for the system to use in the search index for a customer or vendor. For example, if you typically refer to a customer called Atlantic Baseline Systems as ABS, use ABS as an additional keyword.

To add keywords to search for an entity:

1. From the **Maintenance** menu select one of the following:
   - **Customer -** Displays the Customer Maintenance window. Enter a customer's name to display the customer record.
   - **Vendor -** Displays the Vendor Maintenance window. Enter a vendor's name to display the vendor record.
   - **Contact -** Displays the Contact Maintenance window. Enter a contact's name to display the contact record.
2. Do one of the following:
   - For customers or vendors, select **Additional > Additional Keywords** to display the Additional Keywords dialog box.
   - For contacts, select **File > Keywords**.
3. Enter the keywords to use for searches for the entity.
4. Save your changes and exit the dialog box.

Assigning SFA Access to Entities

Define user message groups who can access entity information, such as customer maintenance or Eclipse Dictionaries, using the Eclipse Sales Force Automation (SFA) companion product from a laptop or Palm computing device. You can set different levels of access granted to each ID, depending on your security needs. In addition, you can assign SFA classifications, to build mass e-mails.

To assign access to an entity:

1. From the **Maintenance** menu, select one of the following:
   - **Customer** - Displays Customer Maintenance.
   - **Vendor** - Displays Vendor Maintenance.
   - **Contact** - Displays Contact Maintenance.
   - **Eclipse Dictionary** > **Dictionary Maintenance** > **Access** - Displays the Dictionary Maintenance screen. If prompted, log on to the character-based system.
2. Enter an entity or dictionary name to display the record.
3. Select **File > Access List** to display the Access Control List dialog box
4. Select the first blank row and enter the user or message group name.
5. In the **Level** 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 the row to delete, right click, and select **Delete Row**.

6. Save your changes and exit the dialog box.

To create SFA Contact Classification e-mail list:

1. From the **System > System Files** menu, select **Control Maintenance** to display the Control Record Maint window.
2. In the **Keyword** field, enter **Valid SFA** and press **Enter**.
3. Select Valid SFA Contact Classifications.

4. Enter the name of the list you are creating, such as *Sales Referrals*.
5. Save your changes and exit the window.
6. From the **Maintenance** window, select **Contact**.
7. For *each contact* you want in the new classification, open the contact file.
8. In the **Classification** field, select your list name, such as *Sales Referrals*.
9. Create your e-mail distribution list for your new classification.
10. Save your changes and exit the window.

Entering User-Defined Data for Entities

Use the User Defined Data window 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 windows, 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 **Maintenance** menu, select **Customer**, **Vendor**, or **Contact** to display the entity's maintenance window.
2. Enter the entity's name to display the entity record.
3. Select **File > Classify** to display the User Defined Data window.

   The system populates the following fields and columns:

   - **File Name -** The system file name containing the user-defined prompts listed on the window.
   - **Desc ID -** The entity for which this window 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 window.
- **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** column for any of the prompts listed on the window, enter the value to store for this entry.
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.
   - **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. Select **File > Category** to filter the categories displayed in the list to only those associated with one or more SFA categories.
7. Save your changes and exit the window.

Entering Internet and E-mail Information

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.

To enter internet and e-mail information:

1. From the customer, vendor, or contact record click the **WWW** tab.
2. In the **WWW Address** field, enter the web site address of this customer, vendor, or contact. For example, enter **www.eclipse.com**.

   Click the **Link** button to connect to the web site.
3. The **HTTP Document Address** and **Account Manager** fields are for internal Eclipse use only.
4. In the **E-mail Address** column, enter the e-mail addresses you will use for this entity. The system uses the first email address in this list to populate the Sales Order Header with a contact email address.

   If you use the Web Commerce companion product, use a unique e-mail address for this field. 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.
5. In the **Type** column, select the type that best describes each e-mail address. For example, you could categorize an e-mail address as a contact's business e-mail address, or as a personal e-mail address.

   E-mail types are defined in the **Valid E-mail Types** control maintenance record.
6. In the **Preference** column, select the e-mail format you want to use to send e-mail messages to your customer.

   For example, you can send e-mail in HTML or text format.

   E-mail preferences are defined in the **Valid E-mail Preference** control maintenance record.
7. In the **Account Manager** field, enter the name of the person who manages the web site account.
8. Save your changes and exit the window.

Creating Mass-Marketing E-Mail Distribution Lists

You can create an e-mail with embedding HTML text and send as a mass-marketing tool by using your distribution lists.

To create a mass-marketing e-mail:

1. Using whatever tool you need, create the HTML document you want to e-mail.
2. Upload the document to your Hold File.
3. From the **Report** menu, select **Print**.
4. If prompted, select a printer and click **Email**.
5. From the **File** menu, click **Send Options**.
6. Set the **Send Attachment in Body** field to **Yes** and click **OK**.
7. From the **Distribution Lists** menu, click **Distribution List: To**.

   Use the **Distribution List: CC** and **Distribution List: BCC** to add copied individuals or lists, as needed.
8. From the **File** menu, select **Selection Build.**
9. From the **File** menu, click **Send**.

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