Building business and technology relationships.

Contact Manager

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Updated 7/06/21

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Chapter 1

Introduction

The Contact Manager module is a standard module running independently of, but in conjunction with, other Power Accounting modules. You can now manage all of your contacts in one place, separate from Accounts Receivable customers and Accounts Payable vendors.

Contact Manager includes the following features:

- Access to contacts from the F8 window;
- Contacts can also be managed in Customer and Vendor maintenance;
- Fast and easy search options
- Connecting the same contacts to more than one vendor or customer
- Expanded screens for data collection to assist your sales team

This allows for greater versatility and expansion to include our Contact Relationship Management module.

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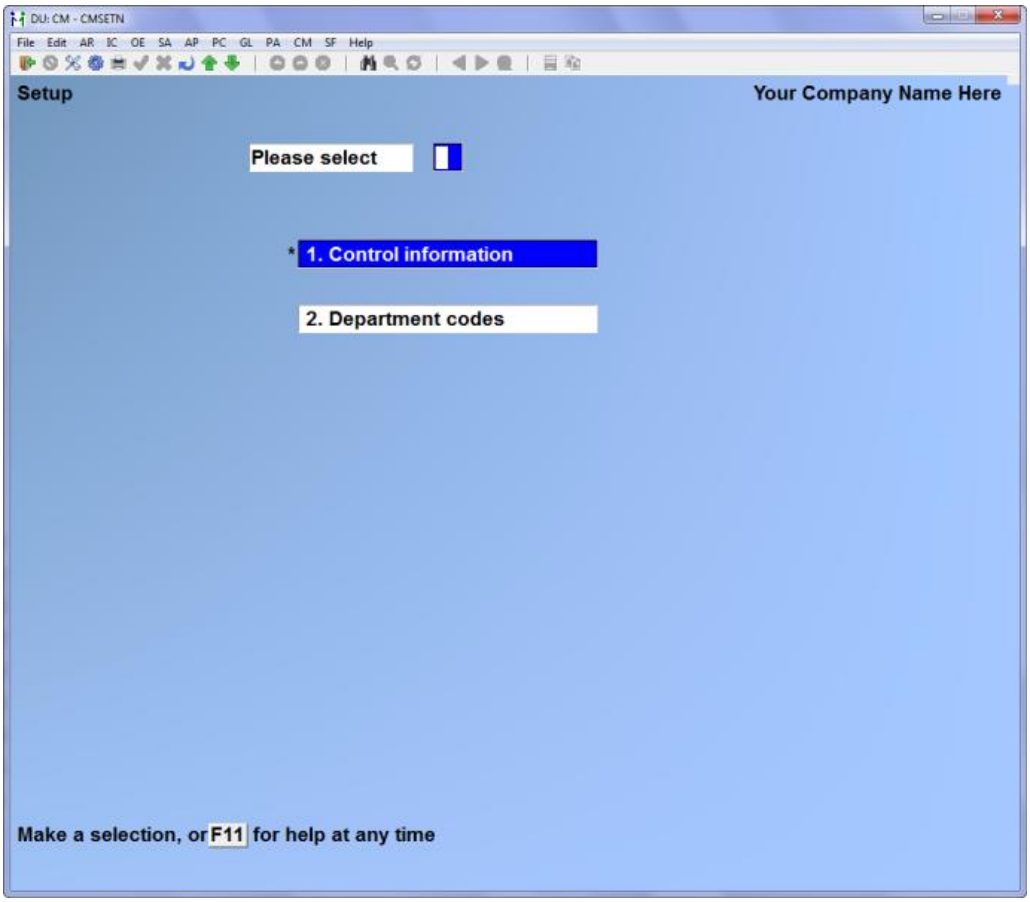
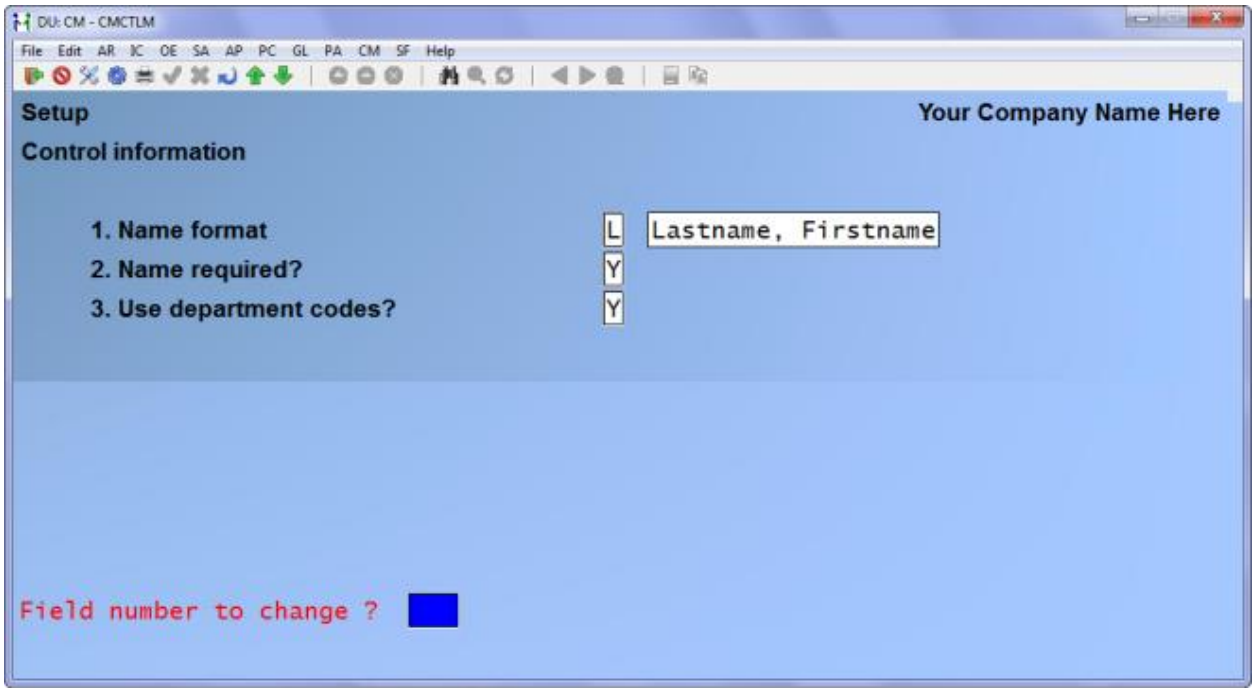
Chapter 2

Control Information

To access *Control Information* go to **Contact Manager ➔ [F2] ➔ *Setup* ➔ Control Information.**





Choose the format you want the name to display in:

F – for First name, last name

Or

L – for Last name, first name

Name required?

Select whether or not a name is required;

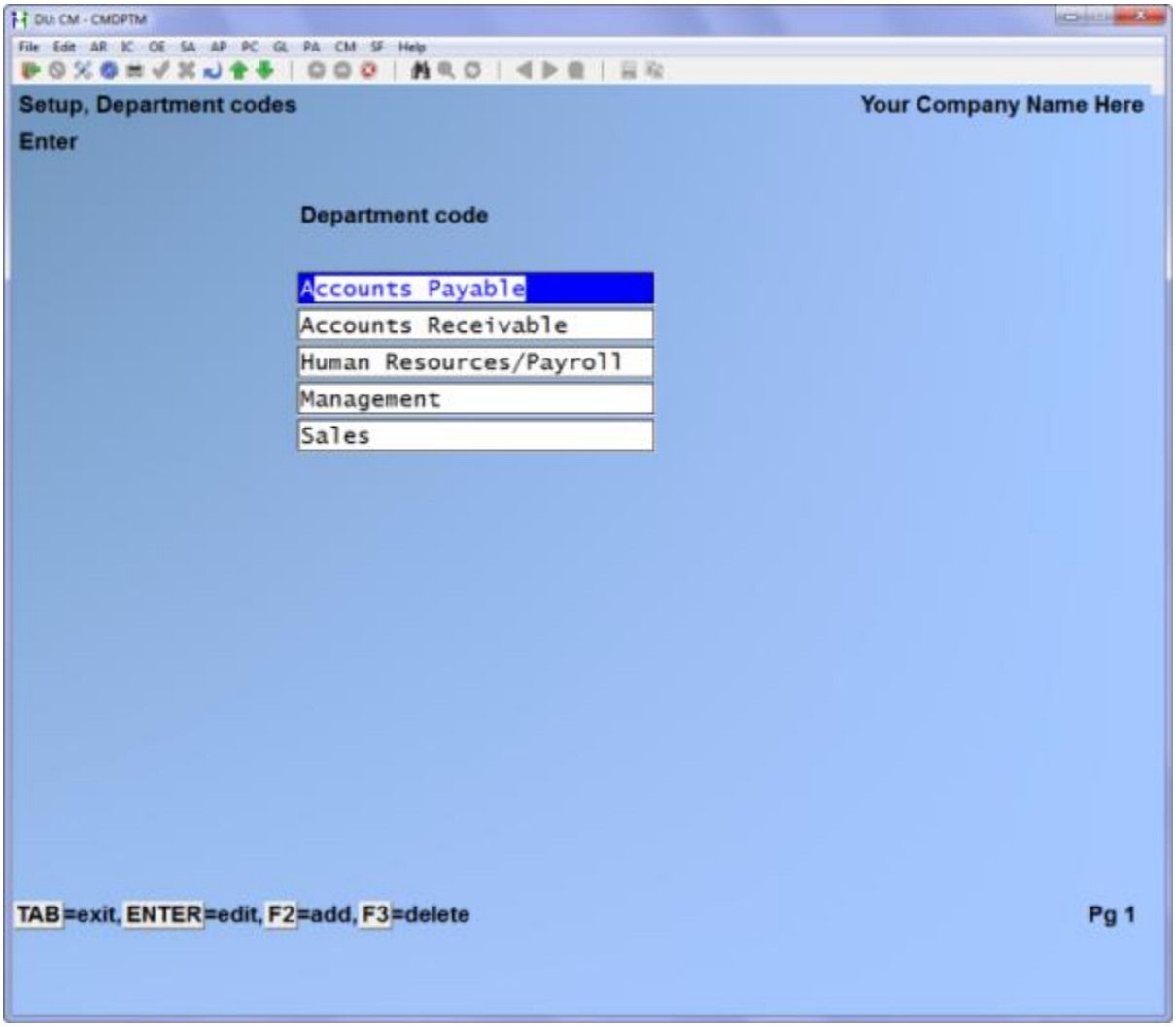
Answer **Y** for Yes or **N** for No.

Use department codes?

Select **Y** to validate department descriptions against a table of standard department names.
Or
Select **N** to allow department names to be anything or nothing.

Department Codes

From the Setup menu choose Department Codes and the following screen will appear:



Enter the department descriptions as you want them to appear, press [**Enter**] when you are done with each code/description. Later change or add use the following:

[**Enter**]	to edit the description
[**F2**]	to add a new description
[**F3**]	to delete a description as long as it is not in use

Press [**Tab**] to exit Department Codes.

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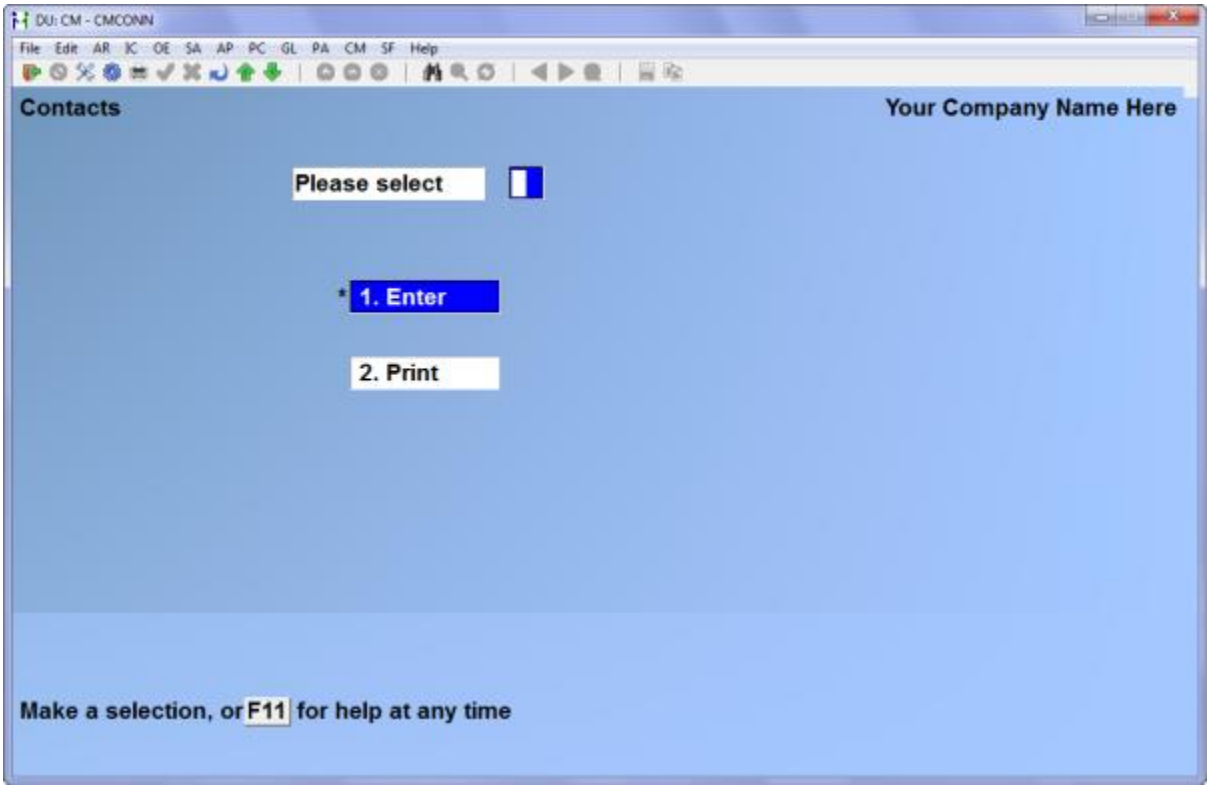
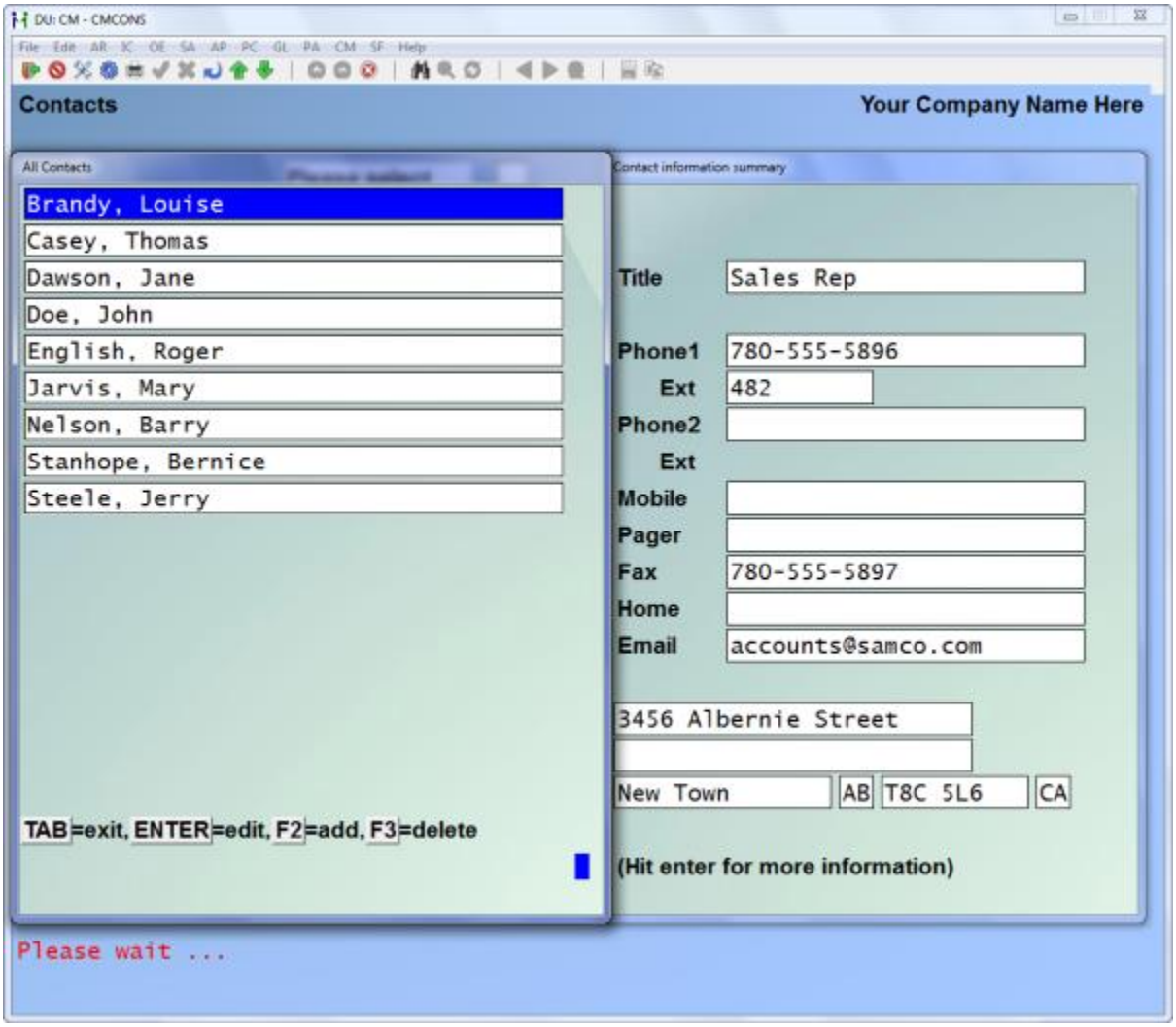
Chapter 3

Contacts

From the Contact Manager menu, select Contacts, and press [**Enter**] and the following screen will appear:



To enter Contacts, select **Enter** and the following screen will appear:



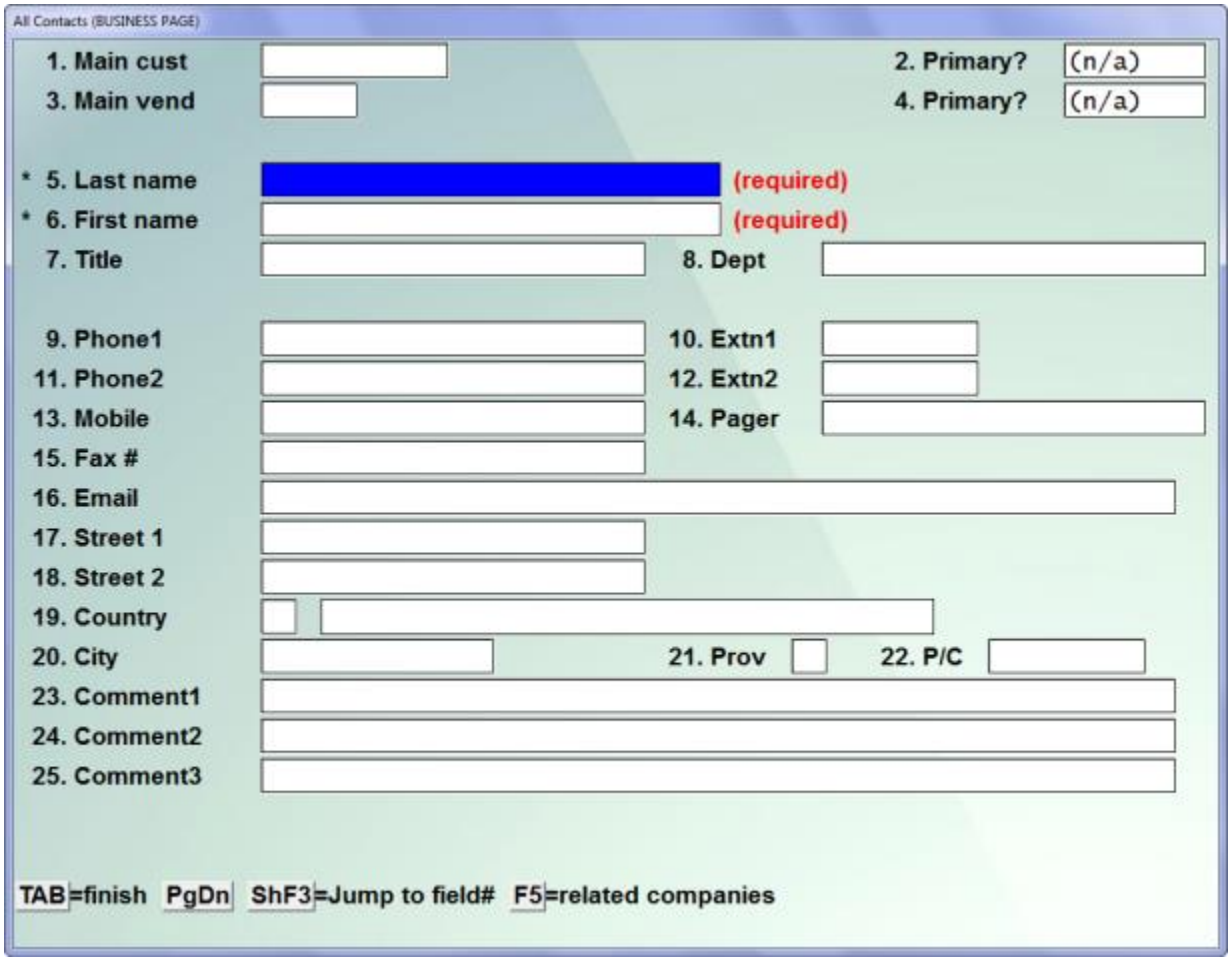
Follow the screen prompts across the bottom of the window,

[Enter]	to edit an existing contact
[F2]	to add a new contact
[F3]	to delete a contact

Pressing [**Tab**] will exit you from the Contacts menu.

Entering a new contact

Press [**F2**] and the following screen will appear for you to enter the new contacts data. You have two pages for data entry; the first is for the Contact's business information, and the second is the Contact's home or personal information.

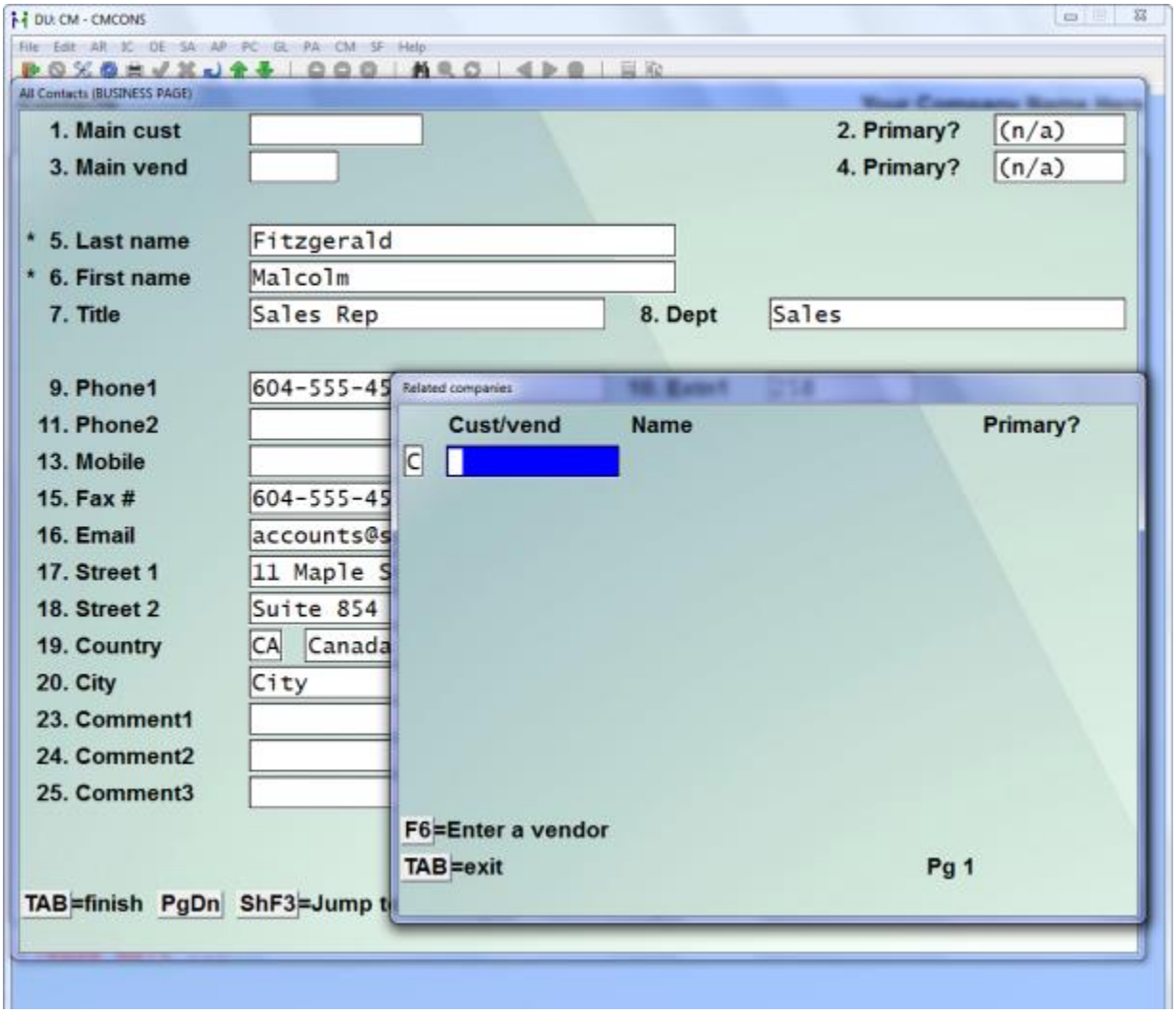


Fill in the information you have regarding your new contact, pressing [**Enter**] at the end to move to the next field. Press [**Tab**] when completed.

To navigate the entry of a new contact you have the following options:

Options:	**Pgdn /PgUp**	to move to the next page
	[**Shft**][**F3**]	to jump to any field number, you will be asked for that field number
	[**F5**]	to enter related Customers/Vendors, you will see a window appear, enter the appropriate Customer or Vendor account numbers this contact is connected to.
	[**Tab**]	to exit this entry

Problems will display in red font such as "bad-format" to inform the user there is an error in the address.



If you enter a [**?**] at the Country field a list will appear for you to select the appropriate country.

To navigate the drop down menu on the Country and Province/State fields you have the following options:

Options:	[**F1**]	to move down 1 page
	[**Shft**][**F1**]	to move back 1 page
	[**F3**]	to search simply type the first 3 letters of the country or,
	[**F4**]	to accept the highlighted selection
	[↑]	to move up a line
	[↓]	to move down a line

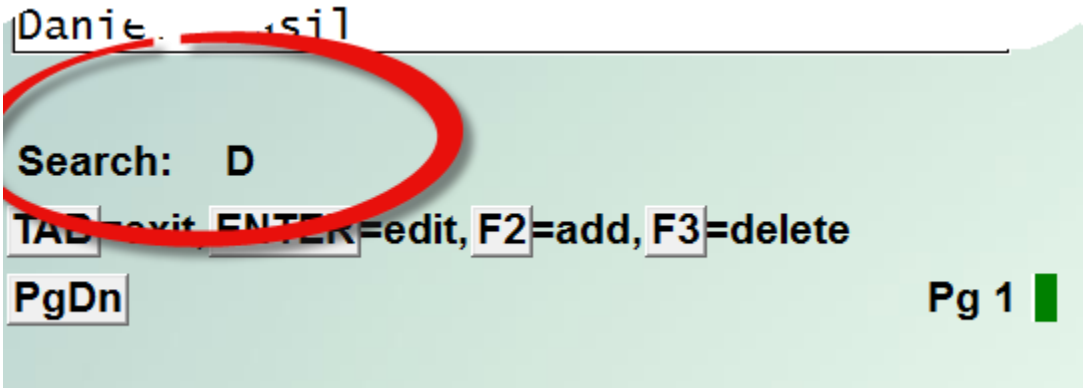
To access your contacts screen while in the A/R Customer Record or A/P Vendor Record press [**F2**] and the contact's screen will open with a list of associated contacts linked to that Customer or Vendor. The list of contacts is on the left and the zoom window will display on the right. You can scroll through using the mouse or the screen prompts on the bottom left window.

Deleting a contact

This can only be done from the Contact Manager module, by pressing [**F3**] while the specified contact is highlighted.

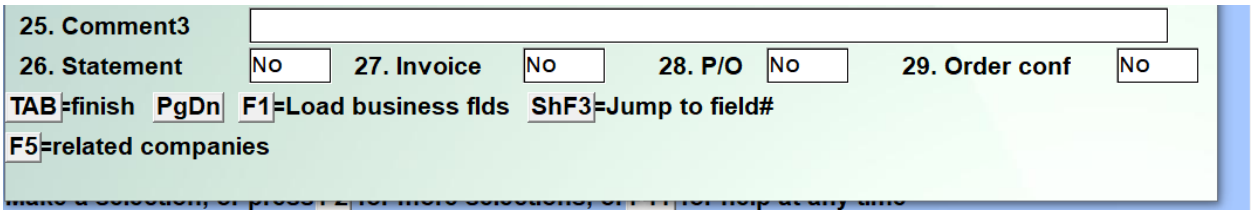
Search for a contact

You can search for any contact from the Contacts List from *Contacts - Enter*. Type the first or first three letters of the name to narrow your search.



eSend Option: Forms by User

With the eSend option to manage forms by user, the following prompts (26 – 29) will appear in the Contact screen maintenance:

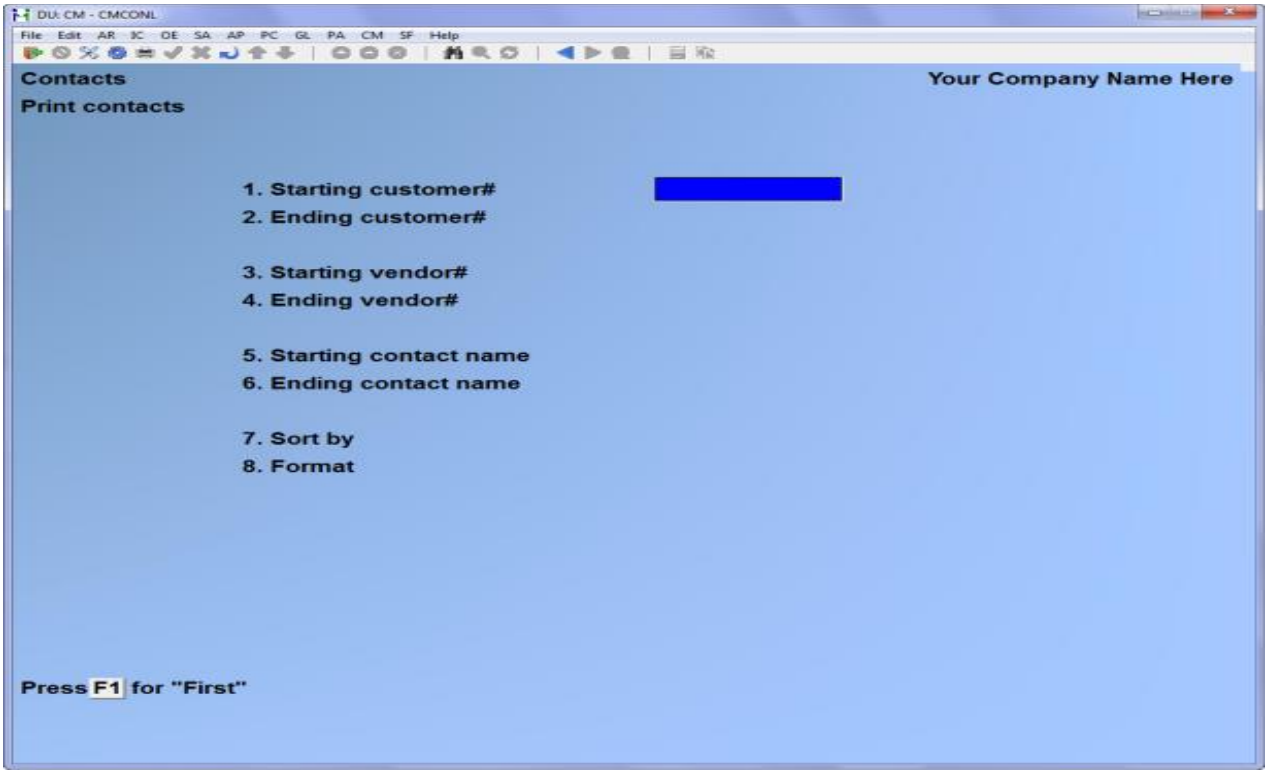


If available, the user can enter Y or N by form type. When eSend is used to email the form, it checks the contacts table to determine who to send the form to. If no contacts are setup to receive a form, the system will use the default email from the Customer / Vendor record.

> **Statement** – Set to Y for Contacts who are to be sent A/R Customer Statements;
>
> **Invoice** – Set to Y for Contacts who are to be sent Billing or Professional Invoicing invoices;
>
> **P/O** – Set to Y for Contacts to send Purchasing P/O's to;
>
> **Order conf** – Set to Y for Contacts to be sent order confirmations when that feature is enabled.

Print

To print a list of contacts by Customer name, Vendor name, or by Contact, go to *Contacts* ➔ *Print*, the following screen will appear:



You can print a list for a specific customer or vendor, or all contacts by entering [**F1**] for first and [**F1**] for last.

Your options to sort by are:

C	Contact name
N	Customer number
V	Vendor number

Your options for format are:

B	Brief	- a list of contacts and their phone numbers
F	Full	- a list of contacts with all of their information you have entered.

Both versions of this report can be sent to the **X. eXport** printer to load into Excel or similar spreadsheet application.

Custom/Vendor Maintenance

Contacts can also be maintained from within *Accounts Receivable* > *Customers* > *Enter*, and *Accounts Payable* > *Vendors* > *Enter*.

Find Contacts

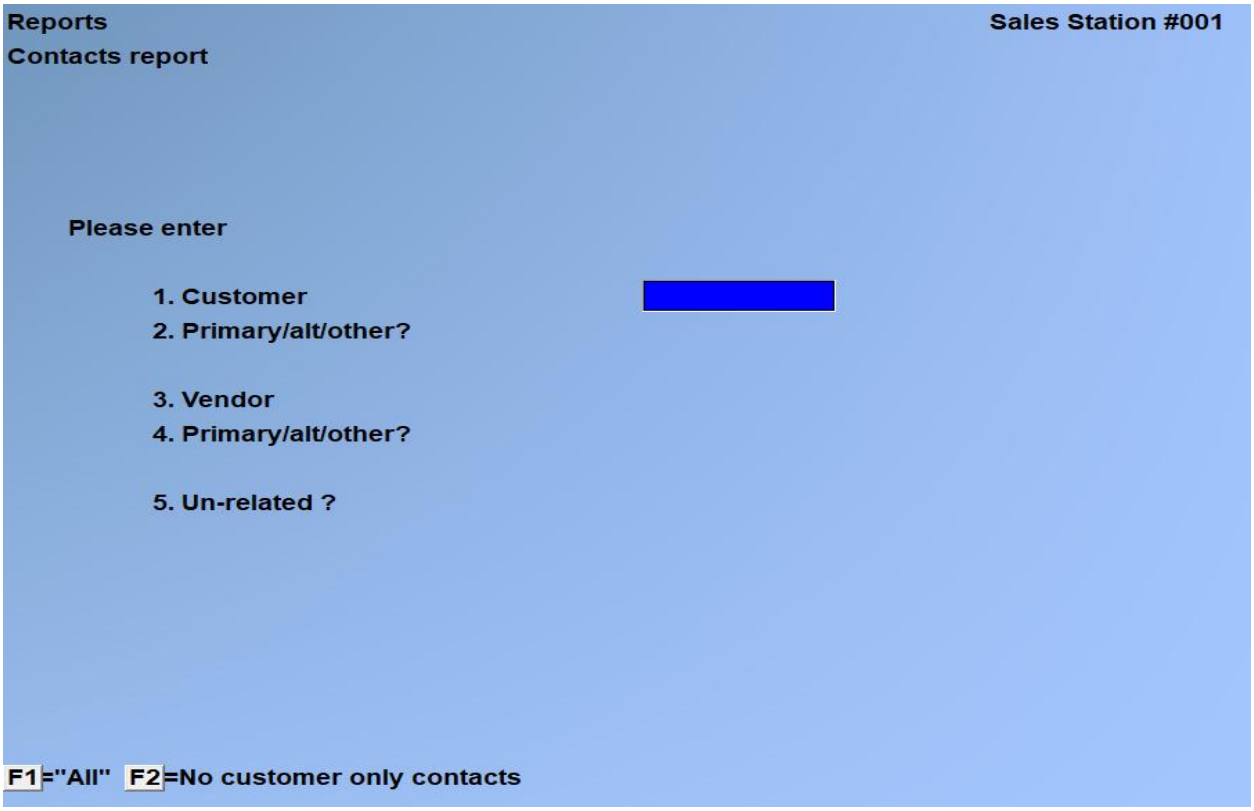
The contacts table can be accessed for viewing only by pressing **[F8]** and then **X**. This is view-only so no changes can be made.

Chapter 4

Contacts Reports

This report comes in a simplified printed version, and a complete (all contact fields) version when sent to the **X. eXport** printer.

Select **Reports** » **Contacts report** from the *Contact Manager* main menu.



Enter the following report criteria on the screen displayed (see sample below):

[?] Customer

Enter the number for a single customer you want to see contacts for, **F1** to see contacts for "All" customers, or **F2** to ignore Customer contacts and show only Vendor contacts.

Primary/alt/other?

Press **F1** for "All" customer contact roles, or enter **P**, **A**, or **O** to narrow down to only that type. Skipped when **Customer** field above set to ignore.

[?] Vendor

Enter the number for a single vendor you want to see contacts for, **F1** to see contacts for "All" vendors, or **F2** to ignore vendor contacts and show only Customer contacts.

Primary/alt/other?

Press **F1** for "All" vendor contact roles, or enter **P**, **A**, or **O** to narrow down to only that type. Skipped when **Vendor** field above set to ignore.

Un-related?

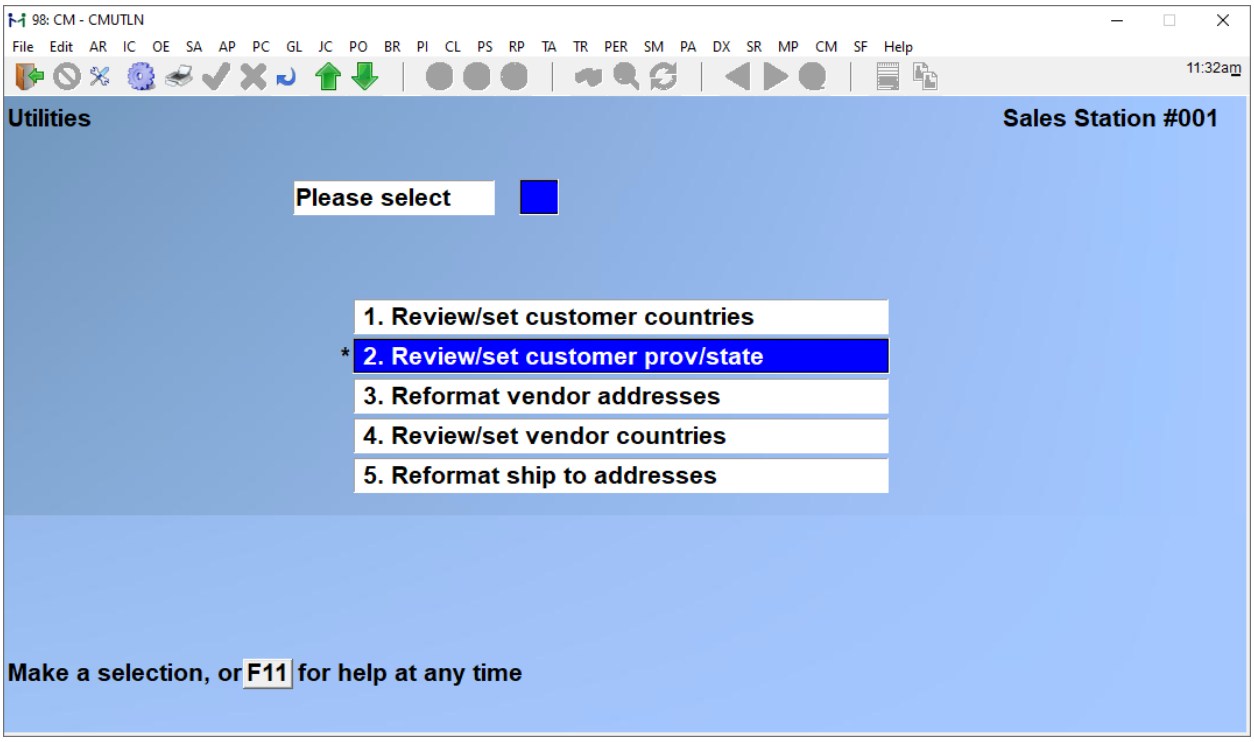
Answer **Y** to include contacts not related to a customer and/or vendor.

Chapter 5

Utilities

All options are for address features in A/R Customers and A/P Vendors. You can run these utilities to update your contacts fields to the new formats.

From the Contact Manager menu choose *Utilities* and the following menu will appear:



Review/set customer countries

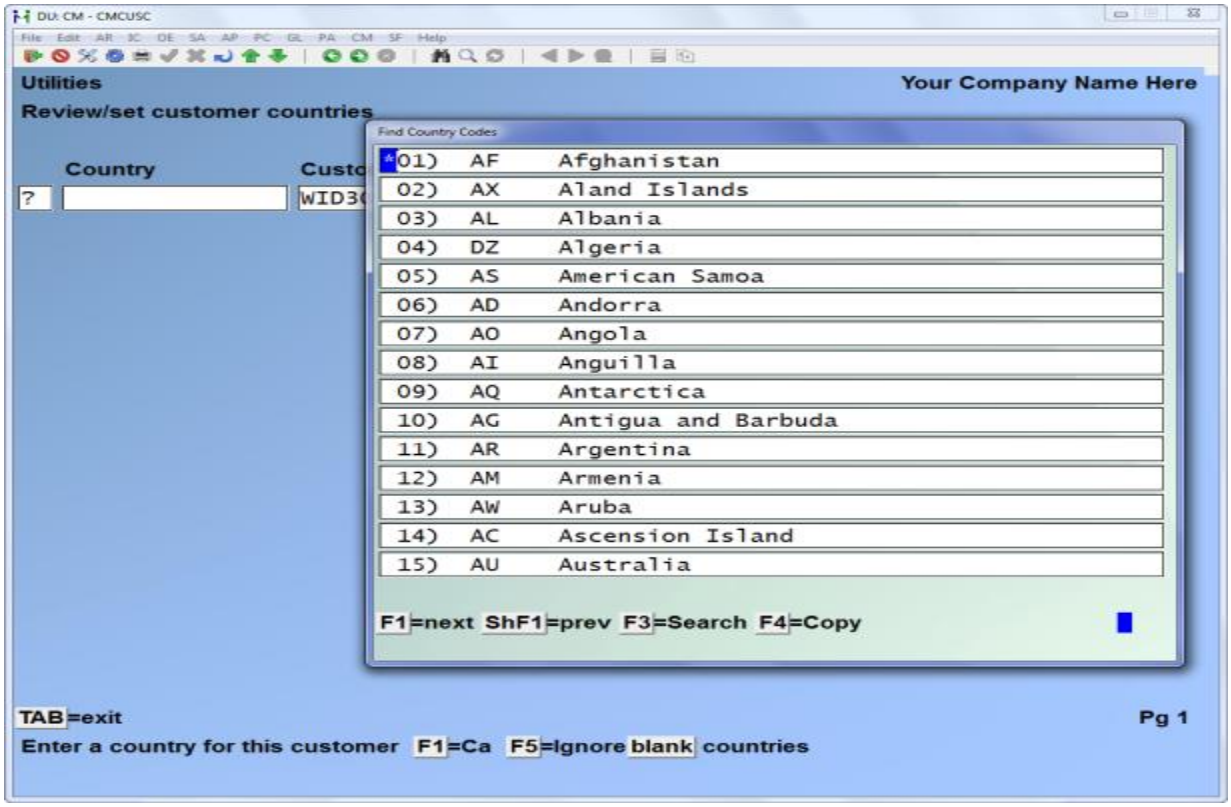
To review/set customer countries – this will display a list of all customers without a country field set.

Answer **Y** to review customers, and the following screen appears:

First field is the country field, you can enter the country and press **ENTER** to move to the next record, if in *AR Control information* you have set a default country, you can enter [**F1**] at the country field and your default will display and move to the next record.

Options:
- **[F1]** to enter default
- **[F5]** to ignore
- **[?]** to use the drop down country menu
- **[Tab]** to exit

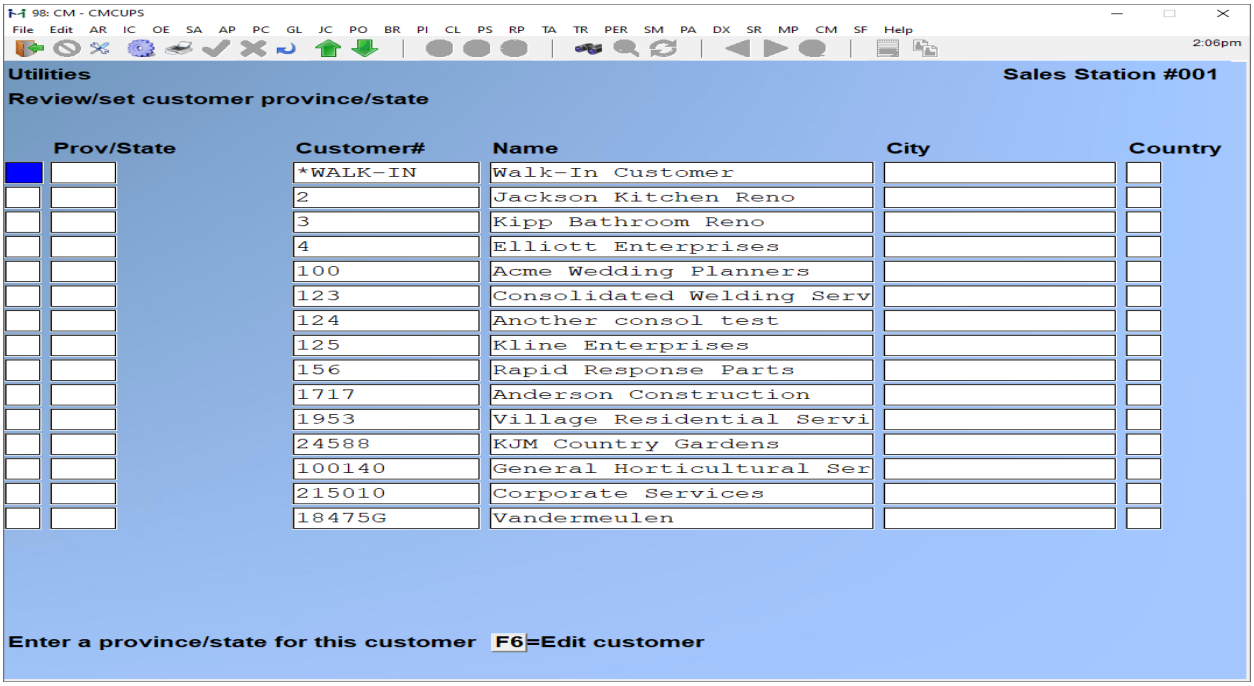
When you have entered the country, the customer record no longer displays.



Review/Set customer prov/state

To review/set customer provinces and states – this will display a list of all customers without the Prov/State field set.

Answer **Y** to review customers, and the following screen appears:



The first field is the province / state field, you can enter the prov/state and press **ENTER** to move to the next record.

Options: **[?]** to use the drop down list menu
[Tab] to exit

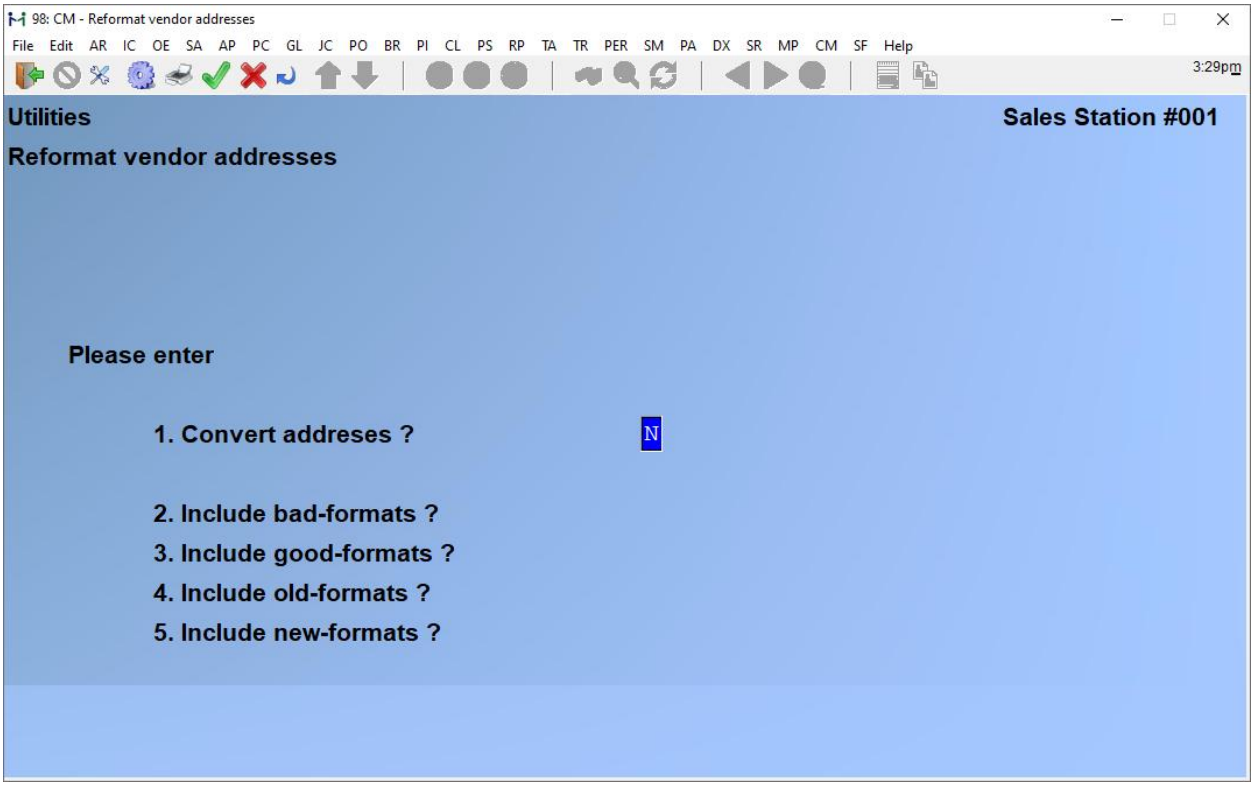
When you have entered the province or state, the customer record no longer displays.

Reformat vendor addresses

This will display a report which shows how the address would be converted to city, province, pc, and any potential errors. This report has an errors only flag so that you can see vendors with problems to be fixed before running the auto-convert.

This utility has an auto-convert option that can be set to yes or no.

Tip: User should always say NO to convert option at first, so you can run the report. You should go to *Accounts Payable » Vendors » Enter* and fix each problem before running the utility to convert all the addresses that fit the layout the program understands.



Include bad-formats?

Answer Y to include addresses that do not look like city, state, zip / postal code.

Include good-formats?

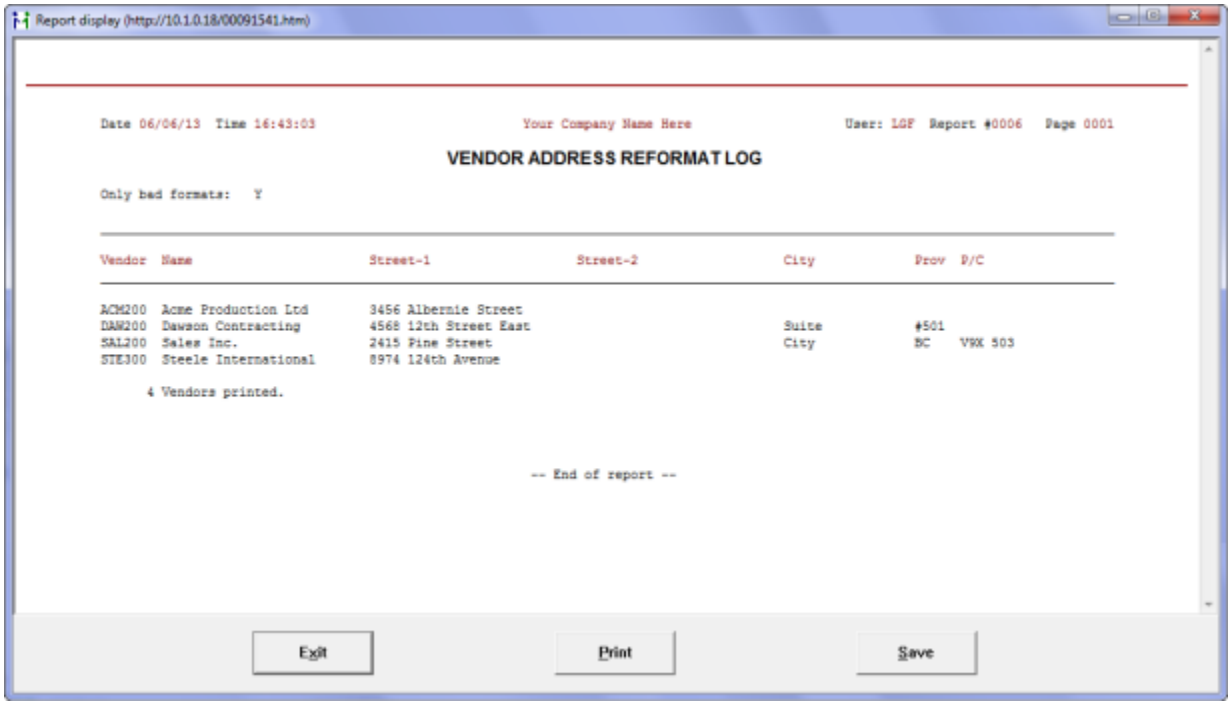
Answer Y to include addresses that do look like city, state, zip / postal code.

Include old-formats?

Answer Y to select vendors who have not been converted to the new format of city, state, and zip / postal code.

Include new-formats?

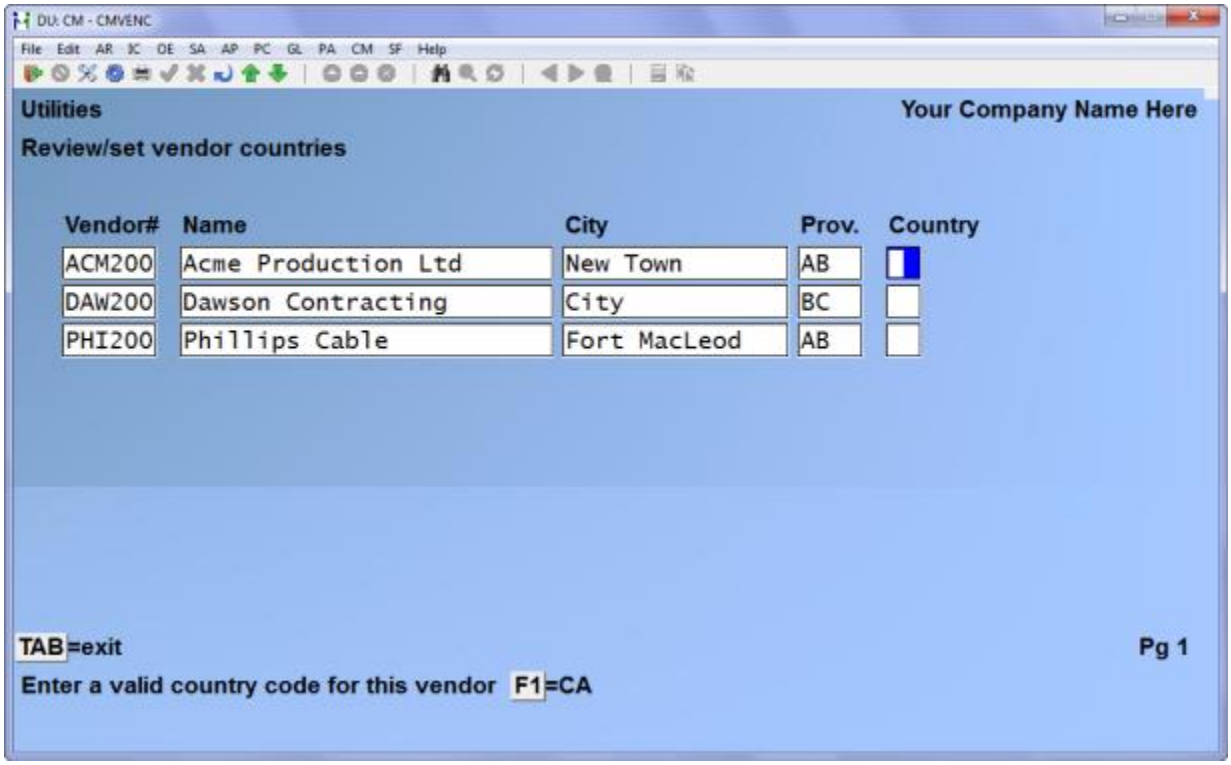
Answer Y to include vendors who have already been converted to the new format of city, state, and zip / postal code.



When you enter **Y** to convert addresses, the maintenance function converts address line #3 to become blank while the City, Province (State), and PC (Zip) will be populated. This will not affect existing forms because the data is stored in the same location, the form will print that as usual.

Review/Set Vendor Countries

Select Review/set vendor countries from the Utilities menu, the following screen will appear if you have vendors on file that require a country field to be set:



From this screen you can enter the country code, enter a [**?**] for the drop down menu of country codes, or if you have set in *Accounts Payable » Setup » Control information* a default country code you will be prompted to enter [**F1**]. When you have set the country code, the vendor item is removed from the screen as it has been corrected.

Reformat ship to addresses

This will display a report which shows how the address would be converted to city, province, pc, and any potential errors. This report has an errors only flag so that you

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Chapter 6

File Utilities

To access *File Utilities*, go to *Contact Manager*, press [**F2**] to go to the second screen and select *File utilities*

This function will allow you to:

- "Recover" the data files that may have become corrupted.
- Recover disk space by rebuilding data files with purged or deleted records that are still taking up space.
- Export your data into a format that can be used by many popular spreadsheet, word processing and data base programs.
- Set the value of user defined fields from values in the customer records.
- Change the G/L accounts for a specific range of customers.

Corrupted data files

Data file corruption does not occur very often, but you do need to be aware of it just in case one of your data files does. This can occur for several reasons. The most common being:

1. The power to your computer gets turned off when you are using your Samco applications.

2. Your hard disk has developed a defect.

Corrupted data files can't be used reliably afterward, and any attempt to use them causes unusual error messages and you are unable to run the Samco applications.

If this occurs, or if you begin to get unusual results while using your software and suspect that there may be a corrupted data file, you should get technical support.

Your supplier or an independent professional may be able to provide this support. If not, contact Samco Software Inc.'s support department directly (there may be a fee).

Handling

Data file corruption does not mean that all of the data in the file is no longer usable. Usually, just a few of the records in the file have become corrupted.

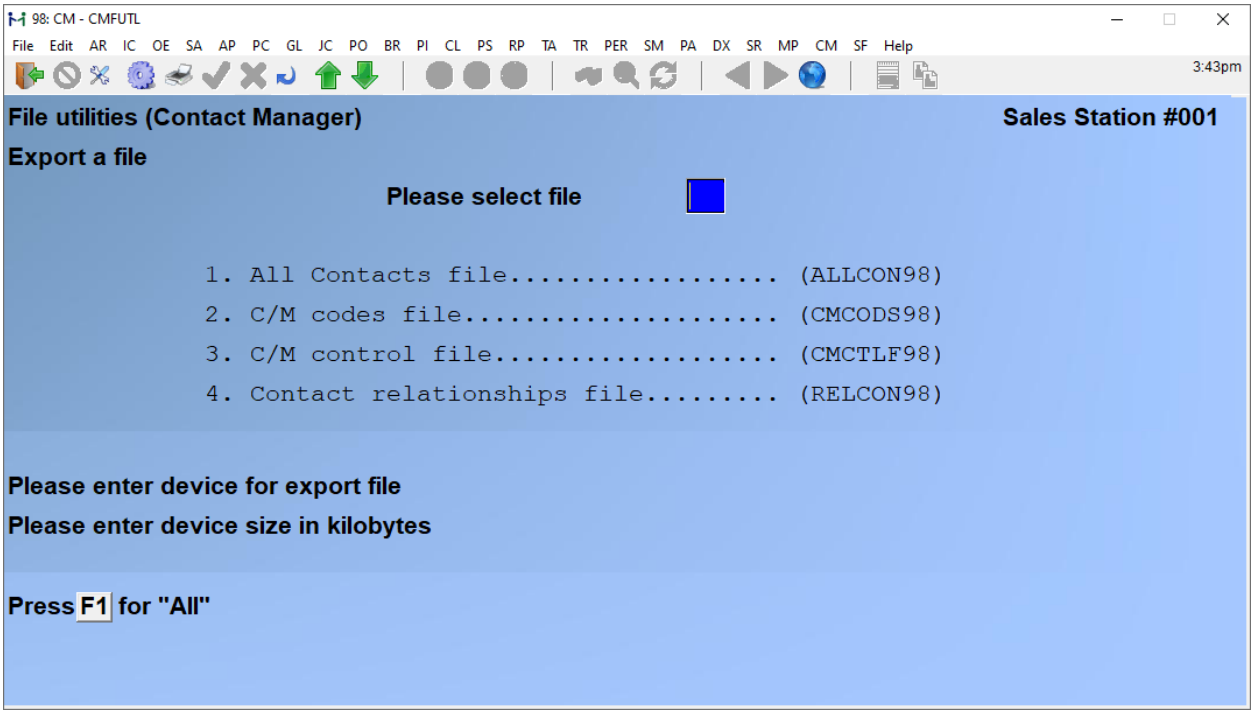
In *File utilities*, the function *Rebuild a file* will take out the good records in the data file, place these in a temporary file, and then replace the old file with the good records. In addition to this, any deleted or purged records which are taking up disk space will also be permanently removed and the file compressed to its physical size.

Once this utility has been run, you should check your data for missing records, and re-enter them. Call for support if you are uncertain. There may be a fee for assistance.

Export a file

This function is used to export data files from the internal format to a "flat" ASCII file. The data file(s) is read in and an output file is created in the Samco root directory with the name "**xxxxxxnn.EXP**". Where '**xxxxxx**' is the file name, and where '**nn**' is the company number the file came from. (If you are running under Unix you will also have the option of appending a drive designation to the front of the file.)

To begin, select *Export a file* from the *File utilities* sub-menu. A screen similar to the one below will appear:



Please select file

Enter the number, from the list provided, of the file to be converted to ASCII format, or press **[F1]** for all.

Please enter device for converted file

This is the drive letter of the device that the ASCII version of the data file will be written to.

<u>For Linux/Unix users</u>

The drive letter entered here will be attached to the front of the file name. The letter D is recommended for consistency. The ASCII backup file name in the Samco root directory will read D**:xxxxxxnn.EXP**.

Alternatively, if you do not want to add a drive letter, press **[F1]** for "none".

<u>For Windows users</u>

The drive letter enter here will be the drive that the ASCII backup file will be written onto. If the drive letter entered is that of a floppy diskette drive you will be prompted if you wish to delete all files on the drive first.

Please enter the device size in kilobytes

[F1] Hard disk or high capacity storage device

The screen will then prompt you "Any change?" Enter **Y** and all the entries that you have made will be cleared and you will be returned to the "Please select file" prompt. Press **[Enter]** to accept the default of **N**.

NOTE: If you choose to convert "All" files, the screen will move immediately into displaying the file and record being backed up. It skips past the "(C) CREATE NEW CONVERTED FILE OR (A) ADD RECORDS TO EXISTING CONVERTED FILE", "STARTING FILE KEY", and "ENDING FILE KEY" prompts

The next screen will be displayed only if did not select "All" files at the "Please select file" prompt. Enter the following data:

1. **Starting file key**
2. **Ending file key**

Enter the starting and ending file keys for the data file selected for conversion, or press **[F1]** for "First" and "Last". Up to 37 alphanumeric characters may be entered. Unless you know the exact key for the records in the data file it is recommended that you press **[F1]**.

When you have completed all entries the following prompt will appear:

(C) create new export file or (A) add records to existing export file

Enter **C** to create a new export file and over-write any pre-existing ASCII export for this data file, or enter **A** to add the records selected for conversion to any pre-existing ASCII export file on the device specified.

After selecting which type of file to create the screen then clears and the ASCII file name is displayed along with a counter of the number of records exported.

If you had selected "All" at the "Please select file", it is assumed that you wish to create a new converted file. After the "Any change?" prompt, the screen clears and the ASCII file name is displayed along with a counter of the number of records exported for all files.

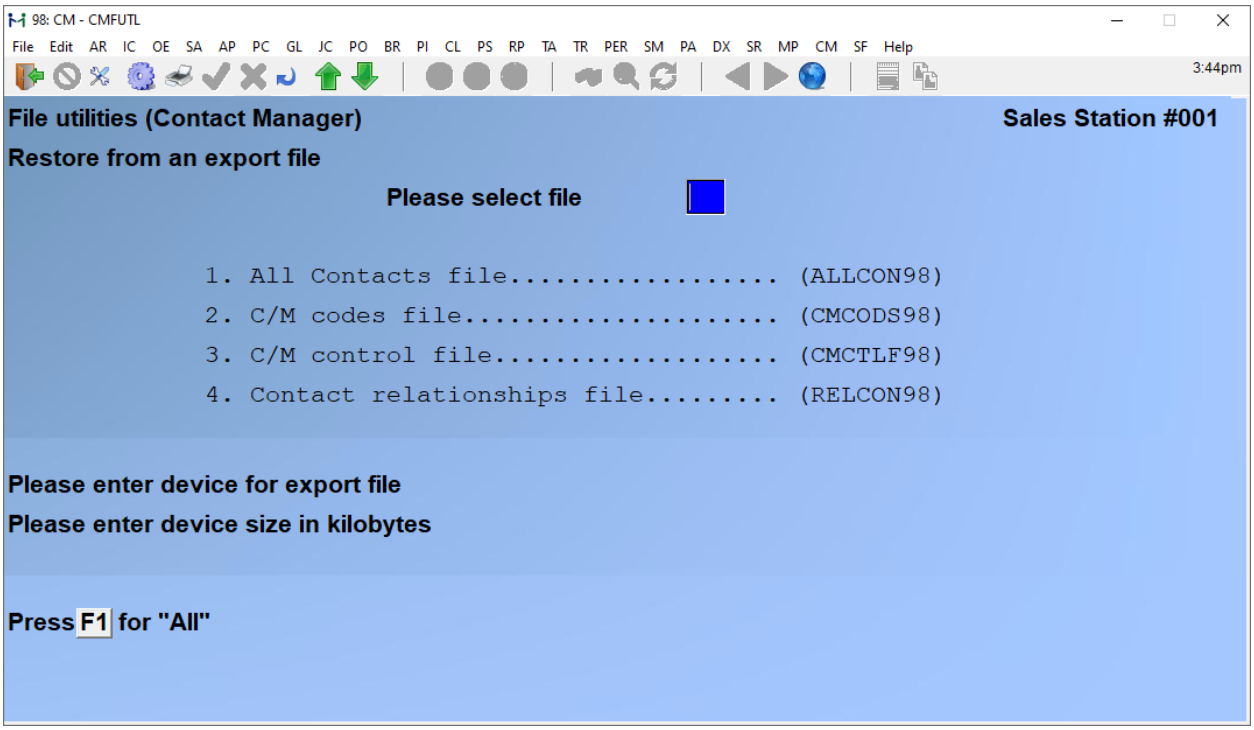
The *Export a file* menu reappears after the file, or files, selected have been exported so that you may choose another file.

After you have completed running the convert routine, press **[Tab]** at the "Please select file" prompt. A window will appear for you to select how to print the export log.

Restore an exported file

This function is used to restore one or more of the listed data files from the "flat" ASCII file format to the internal format. The exported file is read in and an output file is created in the company sub-directory with the name "**xxxxxx.DAT**". Where "**xxxxxx**" is the file name.

From the *File utilities* menu select *Restore an exported file*.
You see:



Enter the following information:

Please select file

Enter the file number, from the list provided, of the file to be restored from an ASCII export format, or press **[F1]** for all.

Please enter device for converted file

This is the drive letter of the device that the ASCII version of the data file will be read from.

<u>For Linux/Unix users</u>

This is the drive letter attached to the front of the file name. For example, if the file to restore is D**:xxxxxxnn.EXP**, you would enter D here. If no designation is at the beginning of the file press **[F1]** for "none".

For Windows users

The drive letter entered here will be the drive that the ASCII export file resides on.

Please enter the device size in kilobytes

Enter the size of the disk the ASCII export files are on.

The following table shows some of the more common device sizes in kilobytes:

1440	3 ½" Floppy
[F1]	Hard disk or high capacity storage device

(C) Create New Data File Or (A) Add Records To existing Data File

If you answer **C** (Create new file), all of the existing data records in the original file will be destroyed, and the data records contained in the converted file will be transferred to the original file.

If you answer **A** (Add records to file), all of the existing records in the original file will remain, and the data records contained in the converted file will be added to the original file.

The following message will display:

"This function will now initialize the data file used in production. Its contents will be fully replaced with data from the converted file. Please make sure you want to do this. Are you sure?"

Answer **Y** or **N** as appropriate.

The file(s) will now be restored. A message will be displayed on the screen, showing the count of the records as they are restored.

When the restoration of the file or files is complete the 'Restore a converted file' menu will be displayed.

You may select another file to restore. You may continue to restore files or press **[Tab]** to print the restore log and then return to the *File Utilities* sub-menu.

A window will appear for you to select where to print the restore log. A restore log shows the file(s) restored, the number of records per file, the date and time.

Rebuilding Data Files

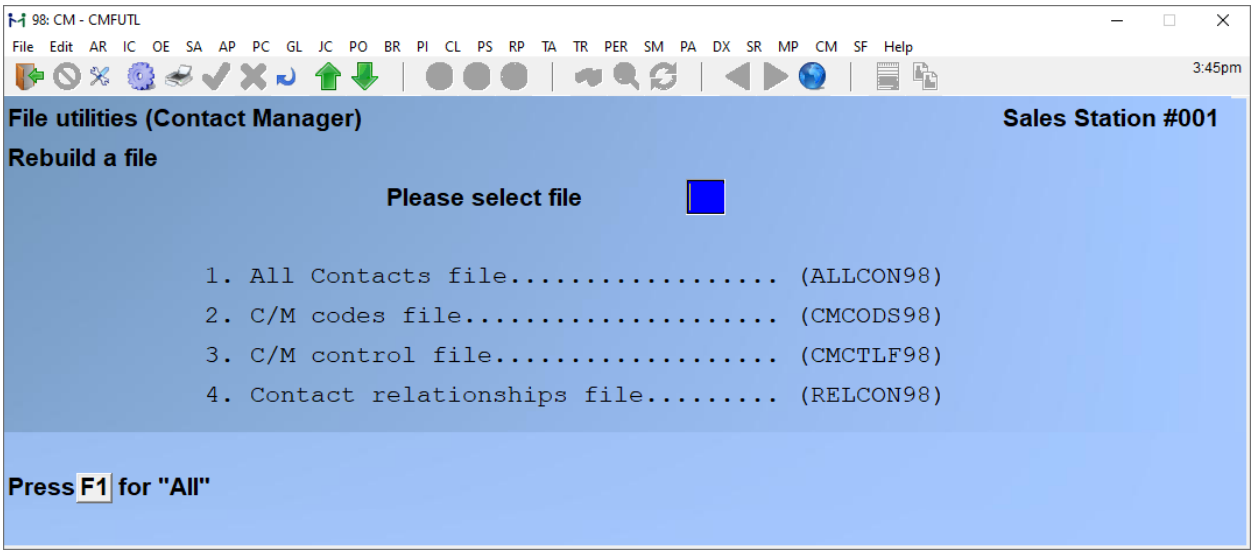
Rebuilding data files can be used for one of two reasons:

1. A data file has become corrupted and needs to be recovered.
2. To recover disk space and clean out deleted or purged records.

The *Rebuild a file* function essentially takes the good records out of a file, removes the old file, and creates a new file with the good records.

To begin, select *Rebuild a file* from the *File utilities* menu.

You then see:



Enter the following information:

Please select file

Enter the number of the file you wish to rebuild or press **[F1]** to rebuild all of the C/M data files.

A new screen will appear showing the status of each file as it is being rebuilt. Once completed, you are returned to the *Rebuild a file* screen.