

HansaWorld Enterprise

Integrated Accounting, CRM
and ERP System for
Macintosh, Windows, Linux,
PocketPC 2002 and AIX

CRM Module

CRM, Activities, Task Manager and Calendar

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Preface

The HansaWorld Enterprise range of products contains a number of powerful accounting, CRM and ERP systems for the Windows, Macintosh, Linux, PocketPC 2002 and AIX environments.

The programs are designed to make administration and accounting as easy and fast as possible. They are similar in operation regardless of platform. In the specific areas where there are significant differences, these are described and illustrated in full. In all other cases, illustrations are taken from the Windows version.

This manual covers Hansa's CRM module, including Activities, Task Manager and Calendar. Prior to reading it, you should already be familiar with Hansa's Work Area (its modules, registers, windows, menus and buttons, covered in the 'Introduction to HansaWorld Enterprise' manual) and the Customer and Item registers (described in the 'Customers and Suppliers' and 'Items and Pricing' manuals respectively).

Text in square brackets - [Save], [Cancel] - refers to buttons on screen.

How these manuals are organised

Introduction to HansaWorld Enterprise

| | |
|------------------------------|---|
| Introduction | Installing HansaWorld Enterprise, the basic ideas |
| Work Area | Basic elements of HansaWorld Enterprise: modules, registers, windows, menus, functions, buttons |
| Accounting Principles | About the place of HansaWorld Enterprise in your business, integration between ledgers, objects |
| Starting Work | Entering opening balances |

Manuals for each Module

| | |
|--------------------------------|--|
| Assets | Asset accounting, calculation of depreciation using user definable depreciation models, revaluation |
| Cash Book | Inward and outward cash transactions, receipts and payments |
| Consolidation | Multi-company reporting, subsidiaries and daughter companies |
| Contracts | Periodic invoicing and repeat billing, contract renewals, contract quotations, contracts from invoices |
| CRM | Time management using daily or monthly calendar formats. Contact and customer history. Customer letters and mailshots. Target time. Employee Time Statistics |
| Currency | Multi-currency in all modules |
| Customers and Suppliers | Customers and suppliers, customer categories and reports |
| Expenses | Payments to and from employees |
| Items and Pricing | Products and services, pricing |
| Job Costing | Project management. Recording time, expenses and purchases. Instalments. Pricing by consultant, project, task and time of day. Budgets and quotations |
| Mail | Internal mail, external mail (email), conferences, off-line local mail, chat |
| Nominal Ledger | Transactions, simulations, budgets and revised budgets. Error correction. Account reconciliation. Transaction templates. Flexible management and financial reports with multi-dimensional analysis and drill-down to transaction level |
| Production | Multi-level assemblies from components |
| Purchase Ledger | Purchase invoices, payments and payment suggestions, creditor reports, prepayments, accruals, acceptance |
| Purchase Orders | Purchase orders, goods receipts and purchase pricing |
| Quotations | Sending quotations, call backs, pipeline management, opportunity forecasting and conversion ratio reporting |
| Report Generator | User-definable reports |
| Sales Ledger | Invoices, receipts, debtor reports and documents, deposits and prepayments, accruals |
| Sales Orders | Orders and deliveries. Invoices from orders |
| Service Orders | Management of service stock, invoicing of repairs, warranties |
| Stock | Deliveries, goods receipts, stock movements, batch and serial number tracking, multi-location stock management |
| System | Settings and parameters. System-wide usage |

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HansaWorld Enterprise

CRM

The Customer Relationship Manager

The CRM module (Customer Relationship Manager) is a simple and efficient tool for keeping track of contacts with Customers, organising mailshots and for planning activities of all kinds. The module can be used to record the different tasks and events in the business day, such as customer contacts for sales, service support, consultancy appointments etc. In Hansa, each task and event is saved as a separate record in the Activity register. Activities can be viewed, reviewed, changed and added to using the Calendar and the Task Manager. They can be used as a planning and monitoring tool for a sales force, or as a tool to log telephone calls to a customer service centre, and in many other ways. As with all Hansa modules, there is a great deal of flexibility, and different users will adapt it to their own requirements.

This manual begins with an example and continues with a description of the Activity register, the heart of Hansa's time and contact management systems. To keep your Activities separate from those of other users, the Activity register cannot be accessed directly except from the System module. Instead, it is accessed through the Calendar, the Personal Calendar report and the Task Manager. These are described later in the manual. The Customer Letter and Target Time registers are then described, and the manual ends with descriptions of the various documents and reports in the CRM module.

Examples

Contact Management

To explain the CRM module we have prepared a small example. The business is an export business with a number of sales persons who communicate with domestic and foreign firms via phone, fax and e-mail. We shall follow one of the sales persons through a day's work with the CRM module.

In the morning, Françoise French will open the Task Manager (i.e. her 'To Do' list). To do this, she will click the [Tasks] button in the Master Control panel—



The Task Manager lists Activities whose Task Type is To Do. In practice, it is a list of the Activities that Françoise is to carry out by the end of the day (including Activities from previous days that have not been completed). Activities that have been marked as Done are not shown. The Activities are sorted by Start Date and Time, but Françoise can change this by clicking on one of the column headings.

| Prio | Done | Text | Supervisor | Phone |
|------|--------------------------|-----------------------------------|--------------------|-------------------|
| 1 | <input type="checkbox"/> | Send details about new DVD system | Eberhard Schmidt | 00 49 49 732 40 |
| 2 | <input type="checkbox"/> | Call to follow up quotation | Joseph Conrad | 01857 122544 |
| 3 | <input type="checkbox"/> | Remember Dinner at Mike's 19:30 | FF Personal | |
| 4 | <input type="checkbox"/> | Sales Visit 11:30 | Mrs Magnusson | 00 47 12 34 56 78 |
| 5 | <input type="checkbox"/> | Dentist 14:30 | FF Personal | |
| 6 | <input type="checkbox"/> | Phone him about prices | Roberto Giacomelli | 00 39 1 2345 6789 |

Number of Activities: 6

If the list was a long one, Francoise could reduce it to show Activities of a particular Type, Customer and/or Priority using the fields above the list.

When Françoise carries out one of these planned Activities, she will double-click the Text in the appropriate row to open the corresponding record in the Activity register. She can then remind herself of the details of the Activity before carrying it out. She does this now for the last Activity in the list.

When the task has been completed, she can record the Result in the field at the bottom of the window and mark the Activity as Done by marking the check box in the top right-hand corner—

Activity: Update

Operations: New Duplicate Cancel Save

Text: Phone him about prices

Type: SC ☒ Done

| Time | Task Type | Symbol | Customer | Project | Service | Text | Persons | User values |
|------------------------------|-----------|--------|------------------------------|---------|---------|------|---------|-------------|
| Start Time: 15:09:26 | | | Start Date: 31/7/2004 | | | | | |
| End Time: 15:41:00 | | | End Date: 31/7/2004 | | | | | |
| Cost (Time): 00:32:00 | | | | | | | | |

Task Type

☐ Calendar
☒ To Do
☐ Timed To Do

Calendar

☐ Time
☐ Profile
☒ Don't Show

Symbol

☐ Call
☐ Meeting
☐ Deskwork
☒ Other

Customer: 009

Name: Giacomelli SPA

Contact: Roberto Giacomelli

Phone: 00 39 1 2345 6789

Result: ML

In this case, the call was made successfully and the Customer expressed interest in the products Françoise was selling. She recorded this interest is recorded in the Activity record, using the grid on the 'Text' card—

Activity: Update

Operations New Duplicate Cancel Save

Text: Phone him about prices

Type: SC ☒ Done

Time Task Type Symbol Customer Project Service **Text** Persons User values

| | Code | Text |
|----|------|--|
| 1 | BR | Seems very interested, send him a brochure |
| 2 | | |
| 3 | | |
| 4 | | |
| 5 | | |
| 6 | | |
| 7 | | |
| 8 | | |
| 9 | | |
| 10 | | |
| 11 | | |
| 12 | | |
| 13 | | |
| 14 | | |
| 15 | | |
| 16 | | |
| 17 | | |
| 18 | | |
| 19 | | |
| 20 | | |

On saving and closing the Activity, the Task Manager is updated automatically. The last Activity is removed, since Activities that have been marked as Done are not usually listed—

| Prio | Done | Text | Supervisor | Phone |
|------|--------------------------|-----------------------------------|------------------|-------------------|
| 1 | <input type="checkbox"/> | Send details about new DVD system | Eberhard Schmidt | 00 49 49 732 40 |
| 2 | <input type="checkbox"/> | Call to follow up quotation | Joseph Conrad | 01857 122544 |
| 3 | <input type="checkbox"/> | Remember Dinner at Mike's 19:30 | FF Personal | |
| 4 | <input type="checkbox"/> | Sales Visit 11:30 | Mrs Magnusson | 00 47 12 34 56 78 |
| 5 | <input type="checkbox"/> | Dentist 14:30 | FF Personal | |

Sometimes, it will not be necessary to open an Activity in order to complete it. The Task Manager itself displays sufficient information to carry out the work, including any notes and comments already entered on the 'Text' card. These notes can be seen by clicking the arrow icon to the left of the Activity Text. Françoise does this for the first Activity in the list—

| Prio | Done | Text | Supervisor | Phone |
|------|--------------------------|--|------------------|-------------------|
| 1 | <input type="checkbox"/> | Send details about new DVD system Interested in the DVD6100 | Eberhard Schmidt | 00 49 49 732 40 |
| 2 | <input type="checkbox"/> | Call to follow up quotation | Joseph Conrad | 01857 122544 |
| 3 | <input type="checkbox"/> | Remember Dinner at Mike's 19:30 | FF Personal | |
| 4 | <input type="checkbox"/> | Sales Visit 11:30 | Mrs Magnusson | 00 47 12 34 56 78 |
| 5 | <input type="checkbox"/> | Dentist 14:30 | FF Personal | |

When she has completed the task, if there is no need to enter a Result, to enter more notes or to create a new follow-on Activity by duplication, Françoise can mark the Done box by clicking —

| Prio | Done | Text | Supervisor | Phone |
|------|-------------------------------------|--|------------------|-------------------|
| 1 | <input checked="" type="checkbox"/> | Send details about new DVD system Interested in the DVD6100 | Eberhard Schmidt | 00 49 49 732 40 |
| 2 | <input type="checkbox"/> | Call to follow up quotation | Joseph Conrad | 01857 122544 |
| 3 | <input type="checkbox"/> | Remember Dinner at Mike's 19:30 | FF Personal | |
| 4 | <input type="checkbox"/> | Sales Visit 11:30 | Mrs Magnusson | 00 47 12 34 56 78 |
| 5 | <input type="checkbox"/> | Dentist 14:30 | FF Personal | |

Number of Activities: 5

This marking of the Done box is not fed through to the corresponding Activity immediately. Françoise must save the Task Manager (by clicking the [Save] button, by pressing the Shift-Enter key combination or by selecting 'OK' from the Record menu) in order to mark Activity as Done and to remove it from the Task Manager list. Of course, she could mark several rows as Done before saving.

On reviewing her Task Manager, Françoise decides to call Joseph Conrad at the Against All Odds Trading Co. She double-clicks in the Text column to open the Activity to remind herself of the details.

Activity: Inspect

Operations New Duplicate Cancel Save

Text: Call to follow up quotation ☐ Done

Type: SC

| Time | Task Type | Symbol | Customer | Project | Service | Text | Persons | User values |
|----------------------|-----------------------|--------|----------|---------|---------|------|---------|-------------|
| Start Time: 11:30:00 | Start Date: 27/7/2004 | | | | | | | |
| End Time: | End Date: 27/7/2004 | | | | | | | |
| Cost (Time): | | | | | | | | |

Task Type

☐ Calendar ☒ To Do ☐ Timed To Do

Calendar

☐ Time ☐ Profile ☒ Don't Show

Symbol

☒ Call ☐ Meeting ☐ Deskwork ☐ Other

Customer: 001

Name: Against All Odds Trading Co

Contact: Joseph Conrad

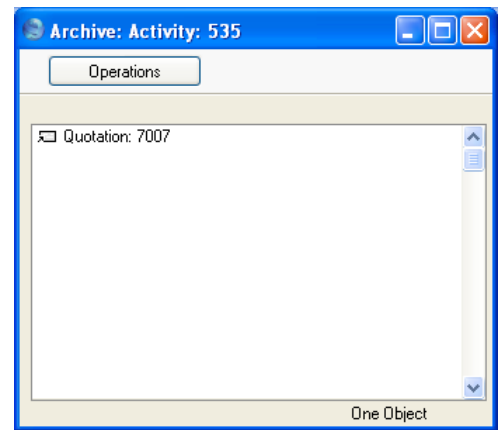
Phone: 01857 122544

Result:

The Text field shows her that she is to make the call to follow up a Quotation that has already been sent, to try to convert it into an Order. In fact, the Activity was created when the Quotation was sent out, using the 'Create Activity' function on the Operations menu of the Quotation screen. This function automatically attaches the Quotation to the Activity. The [Attachments] button (with the paper clip icon) reminds Françoise that the Activity has an Attachment—



When viewing the Activity, Françoise can easily remind herself of the details of the Quotation by clicking this button to open a list of Attachments—



Then she double-clicks the Quotation in the list. The Quotation is opened—

The screenshot shows the 'Quotation: Inspect' window. It has a toolbar with 'Operations', 'New', 'Duplicate', 'Cancel', and 'Save'. The main area contains various fields for quotation details.

Fields:

- No.: 7007
- Name: Against All Odds Trading Co
- Customer: 001
- Project:
- ☐ Closed

Tabs: Date, Items, Currency, Del, Inv. Address, Del. Address, Job Costing

Date: 27/6/2004

Valid Until: 27/7/2004

Pay. Terms: 30

Make Contact: 27/7/2004

Our Ref.: 42

Decision Date:

Attn.: Joseph Conrad

Probability:

Salesman: JNW

Quotation Class: A

Priority:

Status: ☒ Open, ☐ Accepted, ☐ Rejected

| Item | Qty | Description | Unit Price | % | Sum |
|---------|-----|---------------|------------|---|-------|
| 1 10106 | 1 | CD Player | 71.00 | | 71.00 |
| 2 10105 | 1 | Cassette Deck | 56.00 | | 56.00 |
| 3 10110 | 1 | Amplifier | 90.00 | | 90.00 |
| 4 10104 | 1 | Loudspeakers | 15.00 | | 15.00 |
| 5 | | | | | |
| 6 | | | | | |
| 7 | | | | | |
| 8 | | | | | |
| 9 | | | | | |
| 10 | | | | | |
| 11 | | | | | |

Summary:

- Total GP: 143.70
- VAT: 24.73
- Sub-Total: 232.00
- Currency: GBP
- GP %: 61.9
- Base: 256.73
- TOTAL: 256.73

Françoise is able to convert the Quotation into an Order. She selects 'Order' from the Operations menu, and an Order is created and opened—

Order: Inspect

Operations [New] [Duplicate] [Cancel] [Save]

No.: 301 Name: Against All Odds Trading Co
 Customer: 001 ☐ Closed ☐ Reserved

Date **Items** **Currency** **Del Terms** **Inv. Address** **Del. Address**

Date: 27/7/2004 Planned Del.: Desp. Date:
 Pay. Terms: 30 Salesman: JNW Despatch Time:
 Our Ref.: 42 Attn.: Joseph Conrad
 Object: Cust. Ord. No.:

| Item | Qty | Description | Unit Price | % | Sum |
|---------|-----|---------------|------------|---|-------|
| 1 10106 | 1 | CD Player | 71.00 | | 71.00 |
| 2 10105 | 1 | Cassette Deck | 56.00 | | 56.00 |
| 3 10110 | 1 | Amplifier | 90.00 | | 90.00 |
| 4 10104 | 1 | Loudspeakers | 15.00 | | 15.00 |
| 5 | | | | | |
| 6 | | | | | |
| 7 | | | | | |
| 8 | | | | | |
| 9 | | | | | |
| 10 | | | | | |
| 11 | | | | | |
| 12 | | | | | |
| 13 | | | | | |

Total GP: 143.70 Freight: VAT: 24.73 Sub-Total: 232.00
 Currency: GBP GP %: 61.9 Base: 256.73 TOTAL: 256.73

From the Task Manager, therefore, Françoise has been able to move into the Quotation and Sales Order modules, quickly and easily find the Quotation she wanted, and generate an Order, all in single steps. She could now print an Order Authorisation, close the Order and Quotation screens, mark the Activity as Done and finally return to the Task Manager.

At other times during the day, Françoise will be contacted by several of her Customers. By entering an Activity for each contact, she will quickly build up a contact history for each Customer. This means that if, for example, Mr. Wang from Hong Kong sends a fax complaining about a missing delivery of goods, she will easily be able to call up a list of recent Activities in relation to Mr Wang's company. This list would include both her own contacts with the New World Import/Export Co and those of other members of staff.

One way Françoise can do this is to use the 'Filter' card of the Task Manager. She can remove her initials from the Person field, enter "002" as the Customer (using 'Paste Special' to select the correct one if necessary) and choose to view Done Activities using the fourth column of options. She will then see a complete contact history for Customer 002—

Francoise French - Task Manager

Day Planner New Task Save

Person: Type: Customer: 002 Priority:

Activities **Filter**

Select
☒ All
☐ Calls
☐ Meetings
☐ Deskwork

Task Type
☒ To Do
☐ To Do, Calendar
☐ To Do, Timed
☐ All

Display
☒ Up To Today
☐ Next Week's
☐ Next Month's
☐ All

Incl. Done
☐ None
☐ Month
☐ Year
☒ All

Persons
☒ Main
☐ CC
☐ All

| Prio | Done | Text | Supervisor | Phone |
|------|-------------------------------------|------------------------|-------------|-----------------|
| 1 | <input checked="" type="checkbox"/> | Phone him about prices | Li Wuan Sok | 00 852 776 1234 |
| 2 | <input checked="" type="checkbox"/> | Order | Li Wuan Sok | 00 852 776 1234 |
| 3 | <input checked="" type="checkbox"/> | Payment, L/C Received | Mr Wu Ling | 00 852 776 1234 |
| 4 | <input checked="" type="checkbox"/> | Shipped Order | Mr Wu Ling | 00 852 776 1234 |
| 5 | <input checked="" type="checkbox"/> | Arrival HK | Mr Wu Ling | 00 852 776 1234 |

Number of Activities: 5

She will be able to double-click the Text of any Activity to see more details if necessary. An alternative method with the advantage of displaying Activity Dates would be to produce an 'Activities, Customers' report for Customer 002 from the CRM module (detailed version illustrated)—

Activities, Customers

Operations Search

Activities, Customers
Radio Import/Export Ltd

Hansa, Print date: 14/9/2004 01:41
Period 1/1/2004 : 31/12/2004
Customer: 002
Person:

| 002 | Date | Activity | Person | Contact | Comment |
|---------------------|-----------|----------|--------|--|------------------------|
| 93 | 25/4/2004 | SC | FF | Li Wuan Sok | Phone him about prices |
| | | BR | | Seems very interested: send him a brochure | |
| 107 | 15/5/2004 | ORD | FF | Li Wuan Sok | Order |
| | | | | Placed Order no 980134. | |
| 143 | 31/5/2004 | PAY | FF | Mr Wu Ling | Payment, L/C Received |
| | | | | for Order no 980134 | |
| 175 | 4/6/2004 | SHP | FF | Mr Wu Ling | Shipped Order |
| | | | | B/L 9435573467, 4 parcels, 1350 kg | |
| | | | | Agency Wright & Lloyds, Mr Miller | |
| 263 | 18/7/2004 | SHP | FF | Mr Wu Ling | Arrival HK |
| | | | | B/L 9435573467, 4 parcels, 1350 kg | |
| | | | | Agency Wright & Lloyds, Mr Miller | |
| | | | | Message from W & L, arrival this week | |

5

In both cases, Françoise can see at a glance the comments recorded on the 'Text' card of each Activity. Both show the Activities carried out and entered by different persons over the time period, and are excellent tools to be used to sort out any queries or mistakes in relation to a series of events, providing, of course, that each member of staff has conscientiously entered a record of each task they have carried out.

As with all Hansa reports, the 'Activities, Customers' report contains a Search facility that can be used to look for occurrences of a particular word or words in the report. The production of this report can of course be followed by other reports, after searching related information. Several reports can be kept on the screen at the same time, which adds a tremendous flexibility and power to the system. Françoise can also click on an Activity Number in the left hand column to open an Activity record.

Time Management

Françoise is also engaged in time management and analysis. She is in charge of a department in which there are two other sales people working. In planning the work for the coming month, she decides to book a particular afternoon to be spent on the telephones following up leads and making cold calls. She opens her Calendar by clicking the [Calendar] button in the Master Control panel—



Then, she clicks the [New Activity] button and enters an Activity in the names of all three department members, booking their time. To do this, she enters the initials of the three members of the department in the Persons field on the 'Persons' card, separated by commas —

Activity: New

Operations New Duplicate Cancel Save

Text: Telephone sales calls

Type: SC ☐ Done

Time **Task Type** **Symbol** **Customer** **Project** **Service** **Text** **Persons** **User values**

Persons: FF,IP,NB

Cc:

Supervisor:

Language:

Priority: ☐ Private

On the 'Task Type' card, she sets the Task Type to Calendar, signifying that the Activity is to appear in the Calendar rather than in the Task Manager. This Task Type also means that the Activity will be included in the Employee Time Statistics report, used for time analysis. She chooses the Profile option as the Calendar Type to indicate that this is planned time.

Activity: New

Operations New Duplicate Cancel Save

Text: Telephone sales calls

Type: SC ☐ Done

| Time | Task Type | Symbol | Customer | Project | Service | Text | Persons | User values |
|------|-----------|--------|----------|---------|---------|------|---------|-------------|
|------|-----------|--------|----------|---------|---------|------|---------|-------------|

Start Time: 14:00:00 **Start Date:** 13/9/2004

End Time: 17:30:00 **End Date:** 13/9/2004

Cost (Time): 03:30:00

Task Type

☒ Calendar ☐ To Do ☐ Timed To Do

Calendar

☐ Time ☒ Profile ☐ Don't Show

Symbol

☐ Call ☐ Meeting ☐ Deskwork ☒ Other

Customer:

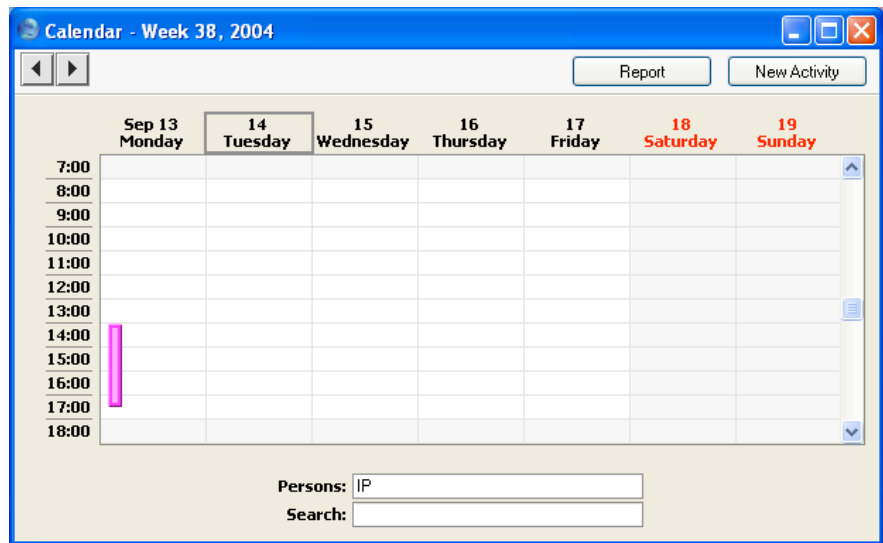
Name:

Contact:

Phone:

Result:

When Francoise saves the Activity, it will appear in the Calendar for each of the three members of personnel. When they open their Calendars by clicking the [Calendar] button in the Master Control panel, they will become aware that their time that afternoon has been booked—



The Activity appears in their Calendar as a hollow coloured bar, because Françoise selected the Profile option. This bar signifies to the other two members of the department that their time has been booked. If either of them clicks the bar once, the Text of the Activity appears in the Search field at the bottom of the screen. They can also double-click this bar to open the Activity record if they want to see more details about what they will be doing.

Everyone else in the company can also view the Calendars of these three members of staff and see that their time has been booked.

During the afternoon in question, various methods are available to Françoise by which she can record the work actually carried out. She decides to ensure that separate Activities are entered for each telephone call. These will record the details of each call (keeping the contact history for each Customer up to date) and allow the creation of follow-up Activities should these be required.

One such Activity recorded by Françoise's colleague Neil Brooker is shown below —

Activity: Inspect

Operations New Duplicate Cancel Save

Text: Telephone sales call

Type: SC ☒ Done

| Time | Task Type | Symbol | Customer | Project | Service | Text | Persons | User values |
|------------------------------|-----------|--------|------------------------------|---------|---------|------|---------|-------------|
| Start Time: 14:00:00 | | | Start Date: 13/9/2004 | | | | | |
| End Time: 14:10:00 | | | End Date: 13/9/2004 | | | | | |
| Cost (Time): 00:10:00 | | | | | | | | |

Task Type

☐ Calendar

☒ To Do

☐ Timed To Do

Calendar

☐ Time

☐ Profile

☒ Don't Show

Symbol

☐ Call

☐ Meeting

☐ Deskwork

☒ Other

Customer: 009

Name: Giacomelli SPA

Contact: Alfredo Giacomelli

Phone: 00 39 1 2345 6789

Result: OK

The Calendar is not really suitable for the displaying of many small Activities representing individual telephone calls, so the Task Type is set to To Do. These Activities are not entered for time management purposes but to contribute to the contact histories of the Customers affected. Selecting To Do means the Activity will not appear in the Calendar or in the Employee Time Statistics report.

Details of each telephone call are recorded in the grid on the 'Text' card of each Activity—

The screenshot shows a software window titled "Activity: Inspect". At the top, there are buttons for "Operations", "New", "Duplicate", "Cancel", and "Save". Below these, there are input fields for "Text:" (containing "Telephone sales call") and "Type:" (containing "SC"). A "Done" checkbox is checked. Below the input fields is a tabbed interface with tabs for "Time", "Task Type", "Symbol", "Customer", "Project", "Service", "Text", "Persons", and "User values". The "Text" tab is selected, displaying a grid with two columns: "Code" and "Text". The grid contains three rows of data:

| Code | Text |
|------|---|
| 1 | Called him about our new DVD home cinema system. |
| 2 | He seemed interested, but would not be able to make the investment for two years. |
| 3 | Will send him details of our instalment plan. |
| 4 | |
| 5 | |
| 6 | |
| 7 | |
| 8 | |
| 9 | |
| 10 | |
| 11 | |
| 12 | |
| 13 | |
| 14 | |
| 15 | |
| 16 | |
| 17 | |
| 18 | |
| 19 | |
| 20 | |

In this example, the call ended with a request to send some information to the Customer. After saving the Activity and while it is still on screen, Neil can click the [New] or [Duplicate] button to create a new Activity containing the instruction to send out the information. This can be in his own name, to remind himself to do this job later, or it can be in the name of the Person that usually sends out information. In the latter case, this Person will become aware that a job needs to be done when the Activity appears in their Task Manager or Calendar (depending on whether Neil sets the Task Type to To Do or Calendar respectively).

The creation of the follow-up Activity can be automatic. This is controlled using the Activity Consequences setting in the CRM module. Separate records can be entered to this setting for each Activity Type/Result combination, specifying the Person, Activity Type and Text to be used in the follow-up Activity. Whenever an Activity with a particular Activity Type/Result combination is marked as Done and saved, a new Activity will be created with these details taken from the appropriate record in the setting.

At the end of the day, Françoise enters new Activities for each member of staff, representing the afternoon's work. These Activities are solely for time management purposes. Neil Brooker had to leave early to go to the dentist, so Françoise enters this Activity recording the work that he was able to do—

Activity: Inspect

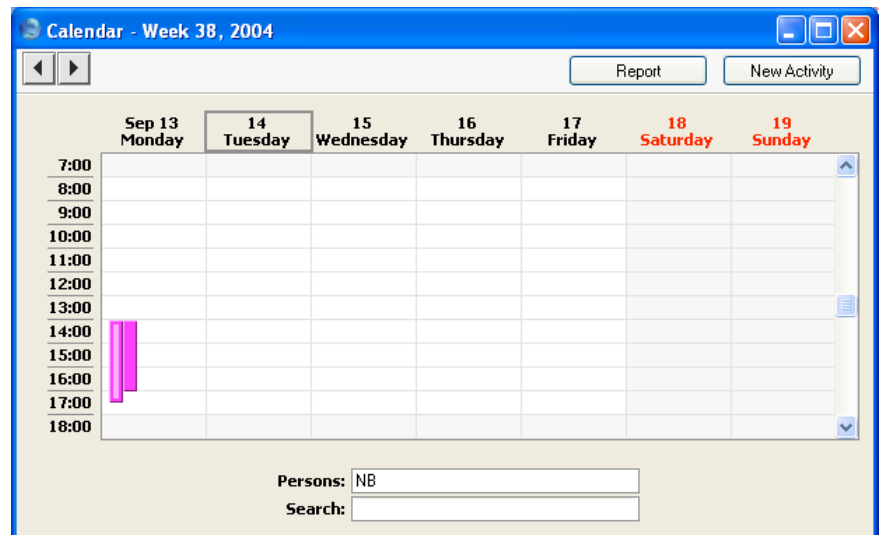
Operations New Duplicate Cancel Save

Text: Telephone sales calls

Type: SC ☐ Done

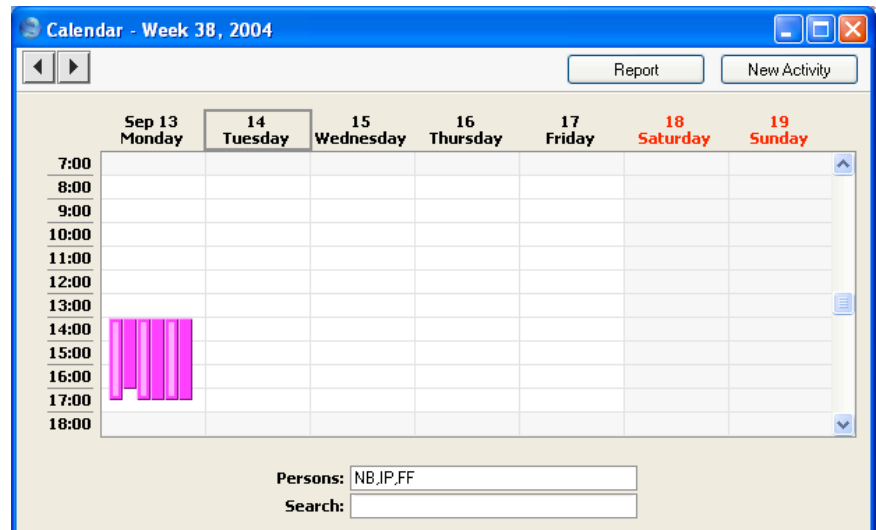
| Time | Task Type | Symbol | Customer | Project | Service | Text | Persons | User values |
|---|-----------|---|----------|---------|---------|------|---------|-------------|
| Start Time: 14:00:00 | | | | | | | | |
| End Time: 17:00:00 | | | | | | | | |
| Cost (Time): 03:00:00 | | | | | | | | |
| Task Type <input checked="" type="radio"/> Calendar <input type="radio"/> To Do <input type="radio"/> Timed To Do | | Calendar <input checked="" type="radio"/> Time <input type="radio"/> Profile <input type="radio"/> Don't Show | | | | | | |
| Symbol <input type="radio"/> Call <input type="radio"/> Meeting <input type="radio"/> Deskwork <input checked="" type="radio"/> Other | | | | | | | | |
| Customer: <input type="text"/> Name: <input type="text"/> Contact: <input type="text"/> Phone: <input type="text"/> Result: <input type="text"/> | | | | | | | | |

Since this Activity is to serve a time management purpose only, she sets the Task Type to Calendar. She selects Time as the Calendar Type, because the Activity represents the actual time spent making the calls. As a result, the Activity will appear in Neil's Calendar as a solid coloured bar to the right of the hollow bar entered earlier to book his time. It was for this purpose of comparison that Françoise created a new Activity instead of changing the earlier Activity from Profile to Time—



Neil's early departure is represented by his Time bar (solid colour, to the right) being shorter than his Profile bar (hollow).

The time spent by all three employees can be shown in the Calendar by entering the three sets of initials in the Persons field, separated by commas—



The position of the coloured bars corresponds to the position of each set of initials in the Persons field. So, the two left-hand coloured bars represent

Neil's Profile and Time, and the two right-hand bars represent Françoise's Profile and Time.

This information can also be analysed in the Employee Time Statistics report. Time Activities appear in the Actual column —

| Employee | Profile | Actual | Diff% |
|---------------------|---------|--------|-------|
| FF Francoise French | 3.50 | 3.50 | 0% |
| IP Ingrid Peterson | 3.50 | 3.50 | 0% |
| NB Neil Brooker | 3.50 | 3.00 | -14% |

Number of employees in list: 3

The Actual and Profile columns show partial hours as decimals, not as numbers of minutes.

In calculating the figures in these columns, all Calendar Activities are taken into account (except those whose Don't Show option has been selected). To Do and Timed To Do Activities are not included in the report, thus keeping Activities used for contact history purposes separate from those used for time management purposes. This removes the risk of including the same time twice in the report. The Activities representing the individual telephone calls all had a Task Type of To Do.

Note on Terminology

Throughout this manual, the word "Customer" is used to refer to a record in the Customer register. That record does not necessarily represent a firm that has purchased goods or services from your business, and in fact can represent any company that is a potential customer or supplier.

As soon as contact is established between your business and a potential client, their details should be entered to the Customer register. Their relationship with you (e.g. "Prospect" or "Lead") should be registered using the Customer Classification field on the 'Contact' card of the Customer record.

The following phrases have sometimes been used to describe Activities of various kinds—

| Phrase | Refers to an Activity where... |
|----------------------|---|
| Calendar Activity | the Task Type is Calendar |
| To Do Activity | the Task Type is To Do |
| Timed To Do Activity | the Task Type is Timed To Do |
| Time Activity | the Task Type is Calendar and the Calendar Type is Time (an Activity representing actual time spent in carrying out a task) |
| Profile Activity | the Task Type is Calendar and the Calendar Type is Profile (an Activity representing the booking of planned [future] time) |

Structure of the CRM module and Access Rights

This manual describes Hansa's CRM features. It therefore covers the CRM module itself, the Activities register, the Calendar and the Task Manager. Several levels of access are possible—

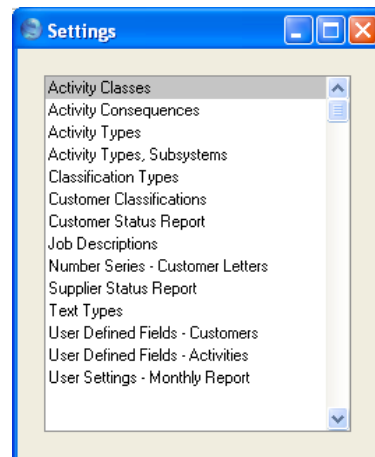
- Granting users access to the CRM module will allow them to use the CRM features described in this manual, but not the Calendar, Task Manager or Activities.
- To be able to use the Calendar, Task Manager or Activities, the user must explicitly be given access to the Calendar and Task Manager modules and the Activity register. The Calendar and Task Manager modules have been provided solely for the purpose of granting or denying a user access to these features: users will be able to open the Calendar and Task Manager from the Master Control panel at any time and while in any module.
- Users that have access to the Activity register will be able to open Activities from the Calendar and Task Manager (and by drilling down from many CRM reports). If you also want them to be able to open Activities that have been attached to other records, you will need to grant them access to the System module as well. It may be necessary to deny access to the other registers, settings and features in the System module.

Please refer to the 'System Module' manual for a full description of controlling access to various modules using the Access Groups setting.

Settings

Introduction

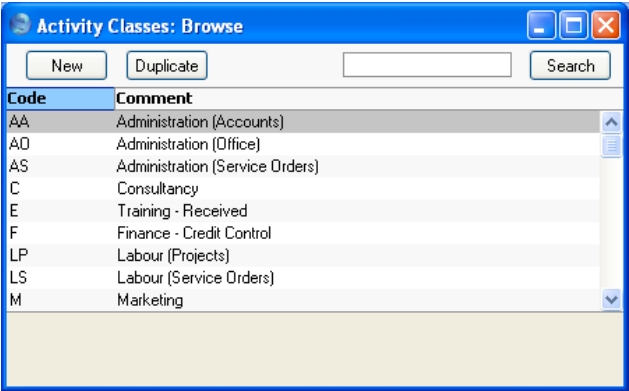
Settings concerned with Hansa's contact and time management tools are located in the CRM module. To access them, use the Modules menu to enter the CRM module and then select 'Settings' from the File menu or click [Settings] in the Master Control panel. The 'Settings' list opens, listing the settings to be found in the CRM module—



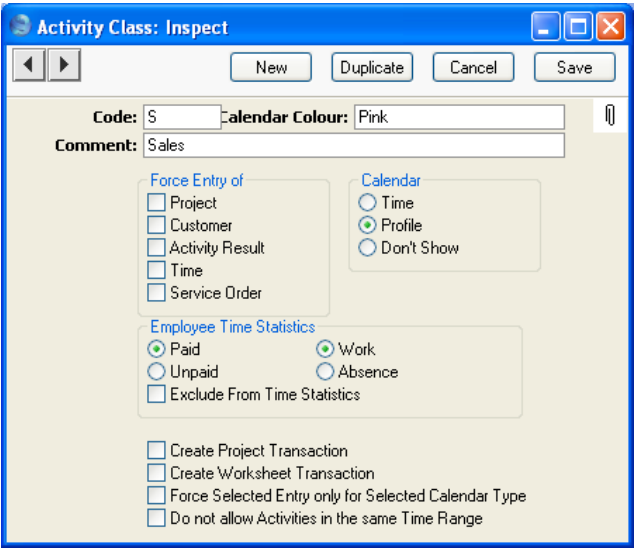
To edit a setting, ensure you are in the CRM module using the Modules menu and click the [Settings] button in the Master Control panel or select 'Settings' from the File menu. The list shown above appears. Then, double-click the relevant item in the list.

Activity Classes

Activity Classes are broad classifications of the various tasks recorded in the Activity register. Each Activity should be given an Activity Type, which should represent a specific job or task (e.g. sales call, sales appointment or internal meeting). In turn, Activity Types of a broadly similar nature (e.g. all those to do with sales, or all those to do with administration) can be grouped together by assigning each one to the same Activity Class.



On double-clicking ‘Activity Classes’ in the ‘Settings’ list in the CRM module, the ‘Activity Classes: Browse’ window opens, listing the available Activity Classes. To enter a new record, click the [New] button in the Button Bar. The ‘Activity Class: New’ window appears: enter the details as appropriate and click [Save] to save the new record.



Code This is the unique code that identifies this particular Activity Class. It can consist of up to five alphanumeric characters.

| | | |
|------------------------------------|----------------------|--|
| Calendar Colour | Paste Special | Choices of possible entries |
| | | All Activities with Activity Types belonging to the same Activity Class will appear in the same colour in the Calendar. Choose that colour using this field. |
| Comment | | Assign a descriptive name to the Activity Class. This is shown in the 'Activity Classes: Browse' window and the 'Paste Special' list. |
| Force Entry of | | Check one or more of these boxes if you would like it to be compulsory for a Project, Service Order, Customer, Result and/or Cost (Time) to be entered to all Activities with Activity Types belonging to this Activity Class. |
| Calendar Type | | These options are used to control how the Activities with Activity Types belonging to this Activity Class are shown in the Calendar. Please refer to the description on page 61 of the 'Task Type' card of the Activity screen for details of each option. |
| Employee Time Statistics | | |
| | | These options control how Activities with Activity Types belonging to this Activity Class are displayed in the Employee Time Statistics report. |
| Paid, Unpaid, Work, Absence | | |
| | | Choose the Paid/Work combination if you want Activities with Activity Types belonging to this Activity Class to be shown in the main section of Employee Time Statistics report and in the main totals for each employee. |
| | | If you choose any other combination (i.e. Paid/Absence, Unpaid/Absence, Unpaid/Work), then again the Activities are included in the main section of the report, but they have their own separate totals for each employee. |
| | | These options do not apply to the Overview version of the Employee Time Statistics report. Whatever the combination, all Activities are shown without distinction in the Overview. |

Exclude from Time Statistics

Use this option if you do not want Activities with Activity Types belonging to this Activity Class to be shown in the Employee Time Statistics report.

Create Project Transaction

Check this box if you would like Project Transactions to be created when Activities with Activity Types belonging to this Activity Class are marked as Done and saved.

This will be useful if you will be using Activities as an alternative to Time Sheets for time recording purposes (to record work carried out against Projects). The Project Transaction register is the mechanism by which instructions are conveyed to the invoicing routine as to how the time is to be charged to the Customer. This is fully described in the 'Job Costing' manual.

If this box is checked for a particular Activity Class, it is recommended that you also choose to Force Entry of Time and Project using the options above, and that the Calendar Type (above) is Time. Project Transactions will not be created from Profile and Don't Show Activities (but any Task Type can be used).

Create Work Sheet Transaction

Check this box if you would like Work Sheet Transactions to be created when Activities with Activity Types belonging to this Activity Class are marked as Done and saved.

This will be useful if you will be using Activities as an alternative to Work Sheets for time recording purposes (to record work carried out against Service and Work Orders). The Work Sheet Transaction register is the mechanism by which instructions are conveyed to the invoicing routine as to how the time is to be charged to the Customer. This is fully described in the 'Service Orders' manual.

If this box is checked for a particular Activity Class, it is recommended that you also choose to Force Entry of Time and Service Order using the options above, and that the Calendar Type (above) is Time. Work Sheet

Transactions will not be created from Profile and Don't Show Activities (but any Task Type can be used).

Force Selected Entry only for Selected Calendar Type

This option works with Force Entry and Calendar Type above. It disables the Force Entry options if you change the Calendar Type in an Activity.

For example, let us say that the Force Entry of Project option has been chosen in an Activity Class, and the Calendar Type is Time. When an Activity Type belonging to this Activity Class is used in an Activity, the Calendar Type in that Activity will be set to Time. You will not be able to save the Activity until you have specified a Project. You will be able to change the Calendar Type in that Activity to Profile or Don't Show, but if you do this you usually will still have to specify a Project. If you are using this option, you will not have to specify a Project if you change the Calendar Type. This can be useful if you know in advance that you will be working on a Project, but you don't yet know which one. You can enter a Profile Activity to book that time, without specifying a Project. After doing the work, you can then enter a Time Activity with a Project.

Do not allow Activities in the same Time Range

Use this option if you want to prevent double-booking in the Calendar. You must also use the Force Entry of Time option above.

The double-booking check will be made whenever you enter a Time Activity with an Activity Type belonging to this Activity Class. You will not be able to save the Activity if it clashes with an existing Time Activity with any Activity Type (i.e. not necessarily one belonging to this Class) and with the same Person.

For example, you have recorded a Time Activity that starts at 09:00 and ends at 12:00. You will not be able to save a second Activity if its Start and/or End Time are between these times. The End Time of the earlier Activity and the Start Time of the later one can be the same, so in this example the second Activity can begin at 12:00 (but not 11:59:59).

Activity Consequences

Use this setting to control the automatic creation of new Activities from old ones that have particular combinations of Activity Types and Results.

This can be useful when, for example, you make a sales call but find that the person you are calling is on holiday. In this situation, you can set up an Activity Consequence record that will automatically create a new Activity to remind you to call them again a few days later. The feature can also be useful for credit controllers using the Activity register to organise debt-chasing calls.

You can also have Service Orders created automatically from certain Activities.

On double-clicking 'Activity Consequences' in the 'Settings' list in the CRM module, the 'Activity Consequences: Browse' window opens, listing the available records. To enter a new record, click the [New] button in the Button Bar. The 'Activity Consequence: New' window appears, as shown below. Enter the details as described and click [Save] to save the new record.

Header

Type, Result

Paste Special

Activity Types setting, CRM module

New Activities will be created when existing Activities with a particular combination of Activity Types and Results are marked as Done and saved. Use these two fields to specify that combination. Only a single Activity

Consequence record can be saved for each Activity Type/Result combination.

To Do Check this box if you would like the Task Type of the new Activity to be To Do. Otherwise, the Task Types in the new and old Activities will be the same.

Copy Links Check this box if you would like the attachments of the old Activity to be copied to the new one.

Activities Card

New Activity **Paste Special** Activity Types setting, CRM module

Specify here the Activity Type to be used in the new Activity record.

Each Activity Type can in turn belong to an Activity Class, which will determine which Calendar Type will be selected by default in the new Activity.

New Person **Paste Special** Person register, System module

If the new Activity is to be carried out by a different Person, enter that Person's initials here. This might be useful for example when the chasing of a debt reaches the stage where it needs to be handed over to a more senior member of personnel. Leave the field blank if the new Activity is to have the same Person as that from which it was created.

Note that the Activity Consequence record will take its cue from the Person in the original Activity as it was last saved. So, if the Person of the original Activity is changed, that record should be saved before it is marked as Done. Otherwise, the new Activity could feature the wrong Person.

Days from now Enter a number here to determine the Start Date of the new Activity. This will be calculated to be that number of days ahead of the Start Date of the original Activity.

Hours from now In a similar manner to the Start Date described above, the Start Time of the new Activity can also be set to be a certain number of hours ahead of that of the original Activity.

With Comment Any Comment entered here will be copied to the Text field of the new Activity.

Resources Card

New Resource State

Paste Special

Resource Status setting,
Resource Planning module

If the original Activity has a Resource specified on its 'Project' card and the Activity changes the Status of the Resource, enter the new Resource Status here. This new Status will be copied to the Resource record automatically. For example, if an Activity records the cleaning of a room, the Status of the Resource representing the room could be changed from dirty to clean when the Activity is marked as Done and saved.

Other Card

Generate Service Order

Use this option if you would like Service Orders to be created from Activities with a particular Activity Type/Result combination and with Serial Numbers and Items on their 'Service' cards.

The Customer details will be copied from the Activity to the new Service Order, and the Item details from the 'Service' card of the Activity will be copied to the first Service Order row. The Text from the Activity header and the first three lines of text on the 'Text' card will be copied to the 'Comment' card of the Service Order.

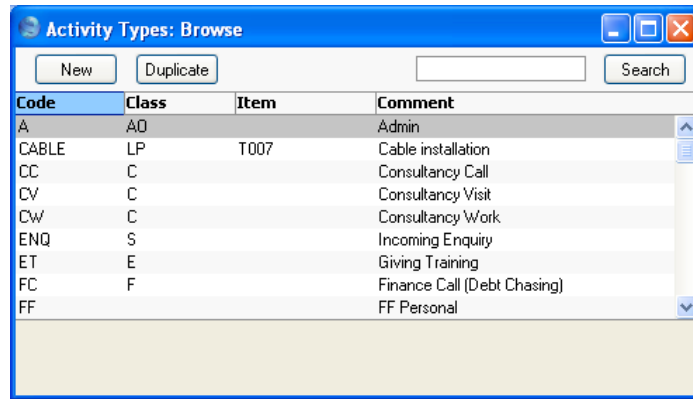
In the example illustration above, whenever an Activity of Type "SD" (for "Sales Demonstration") and Result of "OK" is marked as Done and saved, a new Activity is automatically created for three days' time with a Type of "ST" (for "Sales Telephone Call"). The Private check box in the new Activity will be the same as in the old Activity. The old and new Activities will be linked to each other through the Attachments facility.

Activity Types

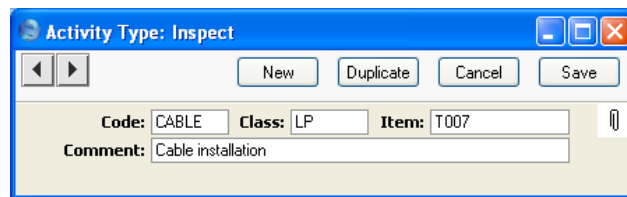
Activity Types are used to classify Activities. Each Activity Type should represent a specific job or task (e.g. sales call, sales appointment or internal meeting). All Activities recording the same task should be given the same Activity Type. The Activity Type can be used as a search criterion in many of the reports in the CRM module.

In defining your Activity Types, you should define some that can be used for Results, allowing the classification of the outcomes of Activities. This is particularly important if you are using Activity Consequences (described above on page 35).

The number of Activity Types should be kept small, and great care should be taken to make them mutually exclusive. Activity Types of a broadly similar nature (e.g. all those to do with sales, or all those to do with administration) can be grouped together by assigning each one to the same Activity Class (described above on page 30).



The 'Activity Types: Browse' window lists the available Activity Types: to enter a new item, click the [New] button in the Button Bar. The 'Activity Type: New' window appears: enter the details as appropriate and click [Save] to save the new record.



Code

This is the unique code that identifies this particular Activity Type. It can consist of up to five alphanumeric characters.

It is recommended that the Codes of all Activity Types of the same Class begin with the same character, so that they appear together in the 'Paste Special' list, making selection of the correct one easy.

Once the record has been saved, you cannot change the Code simply by typing into the field. If you need to change an Activity Type Code, use the Conversions - Master and Conversions - Activity Types settings in the System module. These settings will change the Activity Type Code both here and in all other registers where the Activity Type has been used.

Class**Paste Special**

Activity Classes setting, CRM module

Activity Types of a broadly similar nature (e.g. all those to do with sales, or all those to do with administration) should be grouped together by assigning each one to the same Activity Class (described above on page 30).

All Activities with Activity Types belonging to the same Activity Class will appear in the same colour in the Calendar. You can also force a Project, Customer, Result and/or Cost (Time) to be entered for Activities of the same Class.

Item**Paste Special**

Item register

If an Item is specified here, it will be entered automatically to all Activities of this Activity Type. This will be useful if a Project Transaction is to be created from the Activity.

For example, if the Activity Type represents a particular type of work carried out on a Project or a Service Order, the Item Number of the Item representing the appropriate type of labour can be entered here to ensure it appears correctly in all Activities of this Type.

Only Service or Plain Items can be entered here.

Comment

Assign a descriptive name to the Activity Type. This is shown in the 'Activity Types: Browse' window and the 'Paste Special' list: it should therefore be descriptive enough to make the selection of the correct Activity Type easy for all users.

Activity Types, Subsystems

It is possible to have an Activity created automatically on the completion of another task. This feature is controlled using this setting.

| Generate from | Subsystem | Done |
|-------------------------------------|---|--------------------------|
| <input checked="" type="checkbox"/> | Letters: ML | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | Quotations: Q1 | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | Contracts: CN | <input type="checkbox"/> |
| <input type="checkbox"/> | Purch. Inv.: | <input type="checkbox"/> |
| <input type="checkbox"/> | Work Orders: HR | <input type="checkbox"/> |
| <input type="checkbox"/> | Sales Orders: | <input type="checkbox"/> |
| <input type="checkbox"/> | Sales Invoices: | <input type="checkbox"/> |
| <input type="checkbox"/> | Update Customer's Name on Contact Persons | |

Activities can be created using the 'Create Activity' function on the Operations menus of the Contract, Customer Letter, Purchase Invoice, Quotation, Work Order and Sales Order screens. The Activities will be given the Activity Type specified on the right. In the case of Sales Orders, this will be providing the Order does not belong to an Order Class where an Activity Type has been specified.

In the case of Contracts, Customer Letters, Invoices and Purchase Invoices, Activities can also be created when records are approved and saved. Check the boxes on the left if you would like this to happen: they have no power over the 'Create Activity' function. Again, the Activities will be given the Activity Type specified on the right.

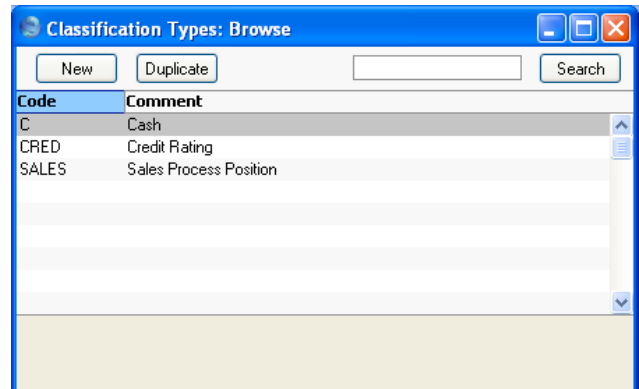
In the case of Sales Orders, Activities can also be created when records are saved for the first time. Check the Generate from Sales Orders box if you would like this to happen. The Activities will be given the Activity Type specified on the right, again providing the Order does not belong to an Order Class where an Activity Type has been specified.

Check the Done box on the extreme right if you would like new Activities to be marked as Done when they are created from a particular register.

Check the Update Customer's Name on Contact Persons box if you would like changes to a Customer Name in the Customer register to be copied to the Contact Persons belonging to that Customer.

Classification Types

Classification Types are used to divide the Customer Classifications (described below on page 41) into groups.



The 'Classification Types: Browse' window lists the available Classification Types: to enter a new item, click the [New] button in the Button Bar. The 'Classification Type: New' window appears: enter the details as appropriate and click [Save] to save the new record.

You can make sure that all Customers are given a Classification belonging to a particular Classification Type. For details, please refer to the description of the Customer Categories setting in the 'Customers and Suppliers' manual.

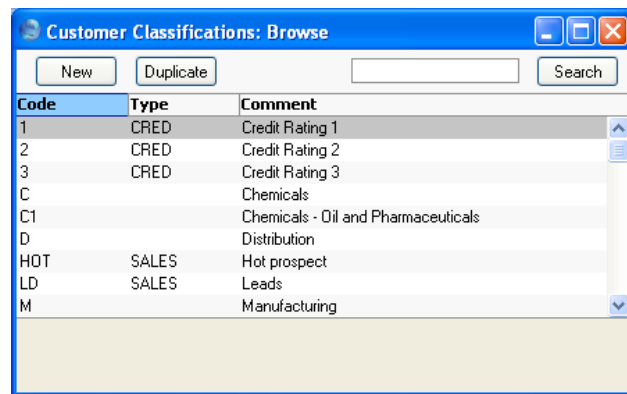
Customer Classifications

This setting allows you to define any number of Classifications by which you can categorise your Customers, perhaps recording their relationship to you (e.g. lead, service customer or retail customer). This is done using the Class. field on the 'Contact' card of the Customer record and on the 'Comment' card of the Contact Person record. This field can contain one or more Classification Codes, separated by commas. So, for example, a particular Customer can be both a lead and have a credit rating of 3.

The Customer Classification provides a different means of classifying Customers compared with the Customer Category setting in the Sales Ledger. This will usually be used to record the types of business in which your Customers are engaged. In addition, each Customer may be allocated more than one Customer Classification, but can only belong to a single Category.

The Customer Classification can be used as a search criterion in many reports in the CRM module (and the EU VAT Sales report in the Sales Ledger).

Customer Classifications can be divided into Classification Types, allowing great flexibility. Classification Types are defined using another setting in this module.



The 'Customer Classifications: Browse' window lists the available Customer Classifications: to enter a new item, click the [New] button in the Button Bar. The 'Customer Classification: New' window appears: enter the details as appropriate and click [Save] to save the new record. 'Paste Special' can be used from the Classification Type field to bring up an option list.

Once a new record has been saved, you cannot change its Code simply by typing into the field. If you need to change a Code, use the Conversions - Master and Conversions - Customer Classifications settings in the System module. These settings will change the Code both here and in all other registers where the Classification has been used.

Customer Status Report

This setting is used to control the appearance of the Customer Status Report when produced using the Operations menu function of the 'Customers: Browse', 'Customer: Inspect', 'Contact Persons: Browse' and 'Contact Person: Inspect' windows. The setting has no effect on Customer Status reports produced using the 'Reports' function in the Sales Ledger.

A separate record can be saved in this setting for each Person, so each user can customise the report to their particular requirements. These records are listed when first double-clicking 'Customer Status Report' in the 'Settings' list in the CRM module. To create a new record, click the [New] button in the Button Bar, or highlight a record in the list that is similar to the one that you are about to create and click [Duplicate].

The following window opens—

User

Paste Special

Person register, System module

Enter the user's initials in the User field, using 'Paste Special' if necessary. Hansa will prevent you from entering more than one record for a particular Person.

Card 1

Include Activities Check this box if Done Activities are to be included whenever the user entered to the field above produces a Customer Status report. If you want to exclude Activities with particular Activity Types from the report, use the Exclude Activity Types field on card 2.

Include Not Done If Activities that are not Done are to be included as well, check this box. This means Activities of all kinds will be listed. This box has no effect if the Include Activities box is not checked. The Exclude Activity Types field on card 2 also applies to Activities that are not Done.

Last Done Activities

Specify here the maximum number of Done Activities that will be shown in the report when produced by the Person in question. The most recent Done Activities will be shown. If the Include Not Done box is checked, all

such Activities that are later than the earliest Done Activity will also be shown. Leave the field blank to list all Activities.

Include Invoices Check this box if Invoices are to be listed in Customer Status Reports produced by the Person entered in the User field above. You should also specify which Invoices are to be included by checking the All Open box and/or entering a number in the Last Paid Invoices field.

All Open Check this box if open (unpaid) Invoices are to be listed.

Last Paid Invoices

If you want paid Invoices to be shown in the report, specify here how many are to be included.

Include Cheques Check this box if you would like cheques received from each Customer to be shown in the report. The Include Invoices and All Open boxes must also be checked, and the Cheques module should be present.

Include Contract Quotations

Check this box if Contract Quotations are to be included whenever the user entered to the field above produces a Customer Status report.

Include Closed Check this box if you want expired Contract Quotations to be included in the listing.

Number of Contract Quotations

Specify here the maximum number of Contract Quotations that will be shown in the report.

Include Contracts Check this box if Contracts are to be included whenever the user entered to the field above produces a Customer Status report.

Contract Class **Paste Special** Contract Classes setting, Contracts module

Enter a Contract Class here to restrict the listing to Contracts belonging to that Class.

Include Not OK Check this box if you want Contracts that have not been approved to be included in the listing.

Number of Contracts

Specify here the maximum number of Contracts that will be shown in the report.

Card 2
Include Monthly Balances (12 months)

Check this box if you want monthly sales totals for the past year to be shown in the report. This information is taken from approved Invoices.

Include Customer Item, No. of months

If you want to list the Items purchased by each Customer over a particular period, check the Include Customer Item box and enter the period in the No. of Months field. The check box will have no effect if the No. of Months field is blank. This information is taken from approved Invoices.

Include Quotations

Check this box if Quotations are to be included whenever the user entered to the field above produces a Customer Status Report. The check box will have no effect if the Number of Quotations field is blank.

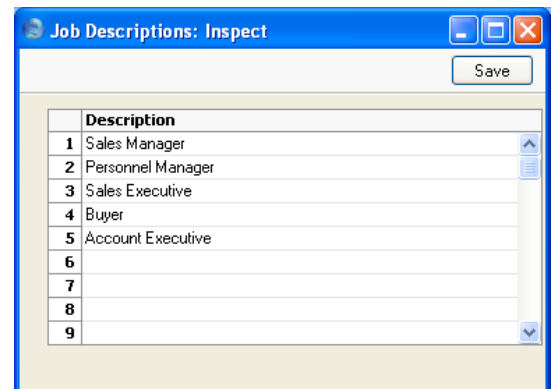
| | | |
|--|---|---|
| Quotation Class | Paste Special | Quotation Classes setting, Quotations module |
| Enter a Quotation Class here to restrict the listing to Quotations belonging to that Class. | | |
| Number of Quotations | | |
| Specify here the maximum number of Quotations that will be shown in the report, starting with the most recent. No Quotations will be shown if you do not enter a number. | | |
| Include Orders | Check this box if Orders are to be included whenever the user entered to the field above produces a Customer Status Report. The check box will have no effect if the Number of Orders field is blank. | |
| Order Class | Paste Special | Order Classes setting, Sales Orders module |
| Enter an Order Class here to restrict the listing to Orders belonging to that Class. | | |
| Number of Orders | | |
| Specify here the maximum number of Orders that will be shown in the report, starting with the most recent. No Orders will be shown if you do not enter a number. | | |
| Exclude Activity Types | | |
| | Paste Special | Activity Types setting, CRM module |
| If you are using the Include Activities and Include Not Done options on card 1, you can choose to remove Activities with particular Activity Types from the report. Enter the Activity Types that you want excluded here, separated by commas. | | |
| To save a user's Customer Status Report setting, click the close box and elect to save changes. | | |

Job Descriptions

This setting is a look-up table used by the Contact Person and Customer Letter registers.

It is possible to report on and mail Contacts based on their Job Description. It is therefore recommended that this setting be used not to record actual job titles (which vary from company to company) but generic job descriptions. This would enable you to report on or mail Contacts with similar roles but varying job titles.

On double-clicking 'Job Descriptions' in the 'Settings' list, the following window appears—



| | Description |
|---|-------------------|
| 1 | Sales Manager |
| 2 | Personnel Manager |
| 3 | Sales Executive |
| 4 | Buyer |
| 5 | Account Executive |
| 6 | |
| 7 | |
| 8 | |
| 9 | |

Enter each new Job Description on the first blank line and, when finished, click the [Save] button in the Button Bar to save the changes. To close the window without saving changes, click the close box.

Number Series - Customer Letters

Each Customer Letter has its own unique identifying number, based on a sequential series. When entering a new Customer Letter, the next number in the series is used. If required, you can have a number of such sequences running concurrently, perhaps representing different years or different departments.

Use this setting to define these sequences, or Number Series. The different series should not overlap. If no Number Series have been defined, Customer Letter Numbers will start at 1 and continue consecutively.

When entering records to the Customer Letter register, the next number in the first Number Series entered to this setting will be used as a default; change to the next number in any other Number Series using 'Paste Special'.

On double-clicking 'Number Series - Customer Letters' in the 'Settings' list, the following window appears—

| No. | Date | | | | | | N/L |
|-----|------|-----|----------|------------|---------|----------|-----|
| | From | To | From | To | Comment | | |
| 1 | 1 | 100 | 1/1/2003 | 31/12/2003 | | GenTrans | |
| 2 | 101 | 200 | 1/1/2004 | 31/12/2004 | | GenTrans | |
| 3 | | | | | | | |
| 4 | | | | | | | |
| 5 | | | | | | | |
| 6 | | | | | | | |
| 7 | | | | | | | |
| 8 | | | | | | | |
| 9 | | | | | | | |
| 10 | | | | | | | |
| 11 | | | | | | | |

Enter each new Number Series on the first blank line and, when finished, click the [Save] button in the Button Bar to save the changes. To close the window without saving changes, click the close box.

The N/L field common to all Number Series settings is not used in this instance.

Supplier Status Report

This setting is used to control the appearance of the Supplier Status Report when produced using the Operations menu function of the 'Customers: Browse', 'Customer: Inspect', 'Contact Persons: Browse' and 'Contact Person: Inspect' windows.

A separate record can be saved in this setting for each Person, so each user can customise the report to their particular requirements. These records are listed when first double-clicking 'Supplier Status Report' in the 'Settings' list in the CRM module. To create a new record, click the [New] button in the Button Bar, or highlight a record in the list that is similar to the one that you are about to create and click [Duplicate].

The following window opens—

User

Paste Special

Person register, System module

Enter the user's initials in the User field, using 'Paste Special' if necessary. Hansa will prevent you from entering more than one record for a particular Person.

Include Activities Check this box if Done Activities are to be included whenever the user entered to the field above produces a Supplier Status report.

Include Not Done If Activities that are not Done are to be included as well, check this box. This means Activities of all kinds will be listed. This box has no effect if the Include Activities box is not checked.

Last Done Activities

Specify here the maximum number of Done Activities that will be shown in the report when produced by the Person in question. The most recent Done Activities will be shown. If the Include Not Done box is checked, all such Activities that are later than the earliest Done Activity will also be shown. Leave the field blank to list all Activities.

Include Invoices Check this box if Purchase Invoices are to be listed in Supplier Status Reports produced by the user entered in

the field above. You should also specify which Invoices are to be included by checking the All Open box and/or entering a number in the Last Paid Invoices field.

All Open Check this box if open (unpaid) Invoices are to be listed.

Last Paid Invoices

If you want paid Invoices to be shown in the report, specify here how many are to be included.

Include Goods Receipts

Check this box if Goods Receipts are to be included whenever the user entered to the field above produces a Supplier Status Report.

Include Monthly Balances (12 months)

Check this box if you want monthly purchase totals for the past year to be shown in the report. This information is taken from approved Purchase Invoices.

Include Supplier Item, No. of Months

If you want to list the Items purchased from each Supplier over a particular period, with quantities and totals, check the Include Supplier Item box and enter the period in the No. of Months field. The check box will have no effect if the No. of Months field is blank. This information is taken from approved Goods Receipts.

Include Orders Check this box if Purchase Orders are to be included whenever the user entered to the field above produces a Supplier Status Report. The check box will have no effect if the Number of Orders field is blank.

Order Class **Paste Special** Purchase Order Classes setting, Purchase Orders module

Enter a Purchase Order Class here to restrict the listing to Purchase Orders belonging to that Class.

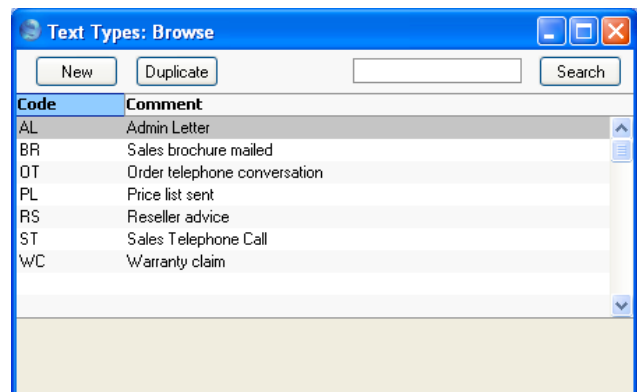
Number of Orders

Specify here the maximum number of Orders that will be shown in the report, starting with the most recent. No Orders will be shown if you do not enter a number.

To save a user's Supplier Status Report setting, click the close box and elect to save changes.

Text Types

When recording Activities, different standard texts from this setting can be included to reduce the typing load.

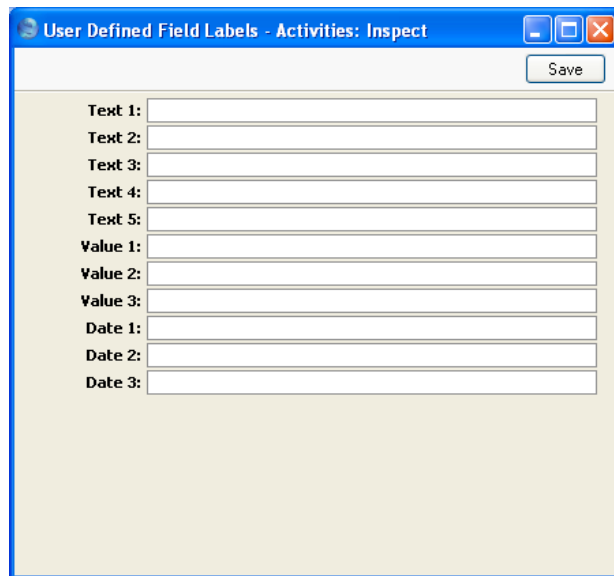


The 'Text Types: Browse' window lists the available Text Types: to enter a new item, click the [New] button in the Button Bar. The 'Text Type: New' window appears: enter the details as appropriate and click [Save] to save the new record.

User Defined Fields - Activities

The Activity record is capable of storing a sufficient quantity of information to cater for most requirements. However, in some circumstances, it might be necessary to store additional information for which no fields have been provided. The User Defined Fields - Activities setting allows you to add your own fields to each Activity record for this purpose. The new fields will be visible on the 'User Values' card of each Activity record.

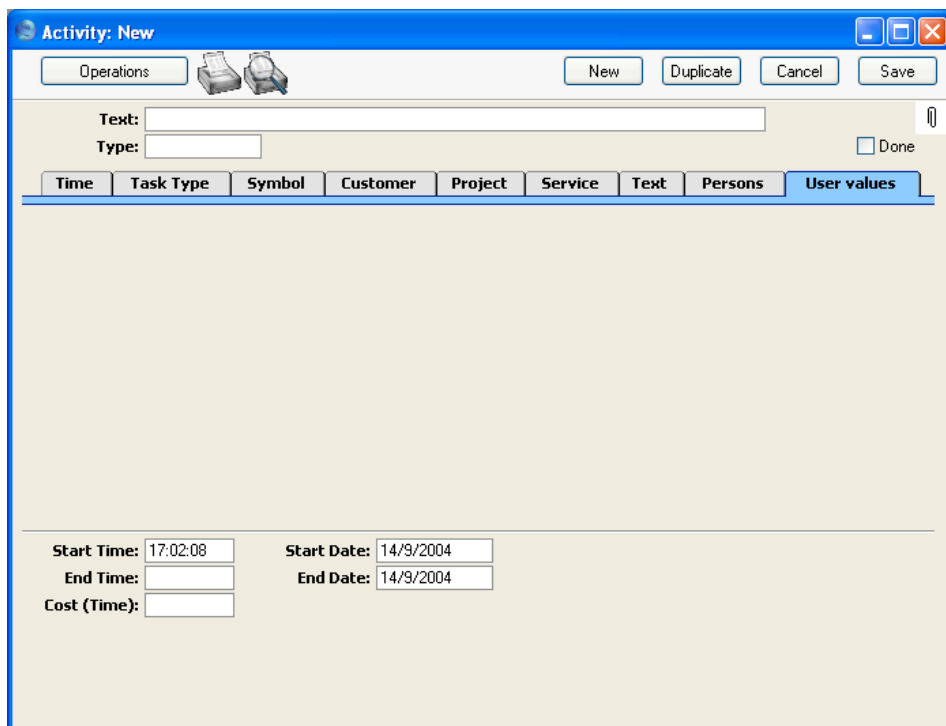
Use the Modules menu to enter the CRM module and then select 'Settings' from the File menu or click [Settings] in the Master Control panel. Double-click 'User Defined Fields - Activities' in the resulting list. The 'User Defined Field Labels - Activities: Inspect' window opens. Make changes as required and then click the [Save] button in the Button Bar to save changes and close the window. Click the close box if you do not want to save changes.



The 'User Defined Field Labels - Activities: Inspect' window is shown. It has a title bar with a globe icon and the text 'User Defined Field Labels - Activities: Inspect'. There are standard window controls (minimize, maximize, close) on the right. A 'Save' button is located in the top right corner. The main area contains a list of labels with corresponding input fields:

- Text 1: [input field]
- Text 2: [input field]
- Text 3: [input field]
- Text 4: [input field]
- Text 5: [input field]
- Value 1: [input field]
- Value 2: [input field]
- Value 3: [input field]
- Date 1: [input field]
- Date 2: [input field]
- Date 3: [input field]

When the 'User Defined Field Labels - Activities: Inspect' window is empty as shown above, the 'User values' card of each Activity will also be empty—



The 'Activity: New' window is shown. It has a title bar with a globe icon and the text 'Activity: New'. There are standard window controls (minimize, maximize, close) on the right. Below the title bar is a toolbar with buttons: 'Operations', 'New', 'Duplicate', 'Cancel', and 'Save'. There are also icons for a printer and a clock. Below the toolbar, there are input fields for 'Text:' and 'Type:'. To the right of these fields is a 'Done' checkbox. Below the input fields is a tabbed interface with the following tabs: 'Time', 'Task Type', 'Symbol', 'Customer', 'Project', 'Service', 'Text', 'Persons', and 'User values'. The 'User values' tab is currently selected. The main area of the window is empty. At the bottom, there are input fields for 'Start Time', 'End Time', 'Cost (Time)', 'Start Date', and 'End Date'.

Use the ‘User Defined Field Labels - Activities: Inspect’ window to give names to the new fields that you want to be shown on the ‘User Values’ card of each Activity record. You can add up to five text fields (fields that can contain letters and numbers), three value fields (fields that can hold numbers only) and three date fields. In this example, we have added two text fields, two value fields and one date field—

User Defined Field Labels - Activities: Inspect

Save

Text 1:

Text 1 Example

Text 2:

Text 2 Example

Text 3:

Text 4:

Text 5:

Value 1:

Value Example

Value 2:

Value 3:

Date 1:

Date Example

Date 2:

Date 3:

This is how they appear on the 'User values' card of the Activity record—

The screenshot shows the 'Activity: New' dialog box with the 'User values' tab selected. The dialog has a title bar with standard window controls. Below the title bar is a toolbar with buttons for 'Operations' (with a printer icon), 'New', 'Duplicate', 'Cancel', and 'Save'. The main area contains a 'Text:' label with a text input field, a 'Type:' label with a dropdown menu, and a 'Done' checkbox. Below these are several tabs: 'Time', 'Task Type', 'Symbol', 'Customer', 'Project', 'Service', 'Text', 'Persons', and 'User values' (which is active). Under the 'User values' tab, there are four example labels with corresponding input fields: 'Text 1 Example:', 'Text 2 Example:', 'Value Example:', and 'Date Example:'. At the bottom of the dialog, there are four more input fields: 'Start Time:' (with '17:04:18'), 'Start Date:' (with '14/9/2004'), 'End Time:', and 'End Date:' (with '14/9/2004'). A 'Cost (Time):' label is also present with an empty input field.

You may need to quit Hansa and restart before any changes made in this setting can take effect.

User Defined Fields - Customers

This setting is similar to User Defined Fields - Activities described above, and allows you to add your own fields to the Customer record. Please refer to the 'Customers and Suppliers' manual for full details.

The Activity Register

All business events, appointments and tasks can be recorded as Activities. Through the careful use of Activity Types and Classes the Activity register can become a valuable source of information recording many different types of customer and other business related operations. Both past and future events can be recorded, so the register can be used as an efficient diary management tool.

Viewing Activities

Activities can be viewed in four ways—

1. From the monthly, weekly or daily Calendar view, double-click the coloured bar representing a particular Activity.
2. Having printed the Personal Calendar report to screen, click the Start Time or Activity Text of any Activity.
3. From the Task Manager, double-click the Activity Text of any Activity.
4. Users that have access to the System module can open the Activity register to view all the Activities that have been entered to the database.

In each case, the ‘Activity: Inspect’ window is opened, allowing to view the details of the Activity and to change it if required.

The Calendar, Personal Calendar report and Task Manager are all described later in this manual (pages 80, 87 and 75 respectively).

Entering an Activity

Activities can be entered in many ways—

1. From any Calendar view, click the [New Activity] button in the top right-hand corner or use the Ctrl-N (Windows and Linux) or ⌘-N (Macintosh) keyboard shortcut. The Task Type of the new Activity will be Calendar, and the Symbol will be Other. The Start Date and Start Time of the new record will show the current date and time.
2. When viewing an existing Activity, click the [Duplicate] button in the Button Bar or use the Ctrl-K (Windows and Linux) or ⌘-Y (Macintosh) keyboard shortcut. The Start Date of the copied Activity will be copied to the new one, but the End Date will be made blank.

3. Having printed the Personal Calendar report to screen, click the text “New Activity” at the top of the report. The Task Type of the new Activity will be Calendar, and the Symbol will be Other. The Start Date and Start Time of the new record will show the current date and time.
4. Having printed the Customer Status report to screen, click the text “New Activity” at the top of the report. The Task Type of the new Activity will be To Do, and the Symbol will be Other. The Start Date and Start Time of the new record will show the current date and time.
5. From the Task Manager, click the [New Task] button in the top right-hand corner. The Task Type of the new Activity will be To Do, and the Symbol will be Other. The Start Date and Start Time of the new record will show the current date and time.
6. When working with Contracts, Customer Letters, Purchase Invoices, Quotations, Work Orders or Sales Orders, select ‘Create Activity’ from the Operations menu of the record window to create an Activity relevant to the record you are working with. The Task Type of the new Activity will be To Do, and the Symbol will be Other. The Start Date and Start Time of the new record will vary, depending on the register from which it was created. The Activity Type used is defined in the Activity Types, Subsystems setting. On selecting the function, the new record is opened in a window entitled ‘Activity: Inspect’. This means that it has been saved and is been opened for checking. After amendment if necessary, save the record by clicking the [Save] button in the Button Bar. Alternatively, if you no longer require the Activity, select ‘Delete’ from the Record menu.

Activities can also be created from Customers, Projects, Service Orders, Mails and Production records using the ‘Create Activity’ Operations menu function. In these cases, the new Activity will not be given a default Activity Type.

The Activity and the originating record will remain connected to each other through the Attachments facility. This allows you to open the originating record quickly and easily when reviewing the Activity, or to open the Activity from the originating record. When viewing the Activity or originating record, click the button with the paper clip image to open a list of attachments. Then double-click an item in this list to open it.

7. When working with Contracts, Customer Letters, Invoices and Purchase Invoices, Activities can be created when records are approved and saved. This is controlled using the Activity Types, Subsystems setting. Such Activities are created and saved, but are not automatically opened for

checking or modification. Again, the Activity and the originating record will remain connected to each other through the Attachments facility.

When working with Sales Orders, Activities can be created when Orders are saved for the first time. This is controlled using the Order Classes setting. Such Activities are created and saved, but are not automatically opened for checking or modification.

8. From the browse windows listing Sales Orders, Service Orders and Contracts, you can highlight several records and select 'Create Activity' from the Operations menu. Separate Activities will be created for each highlighted record. On selecting the function, the new Activities are created and saved, but are not automatically opened for checking or modification. In the case of Sales Orders, the Activity Type of these new Activities will be taken from the Activity Types, Subsystems setting.
9. A new Activity can be created automatically from an old one when a Result is entered and it is saved. This depends on the Activity Type/Result combination and is controlled using the Activity Consequences setting. Such Activities are created and saved, but are not automatically opened for checking or modification. The old and new Activities will remain connected to each other through the Attachments facility.

Whichever method is used, when the Activity window opens, enter whatever relevant information you need to record about the event. In the case of future appointments, you will easily be able to return to the record to review it and mark it as completed at the appropriate time.

Since the amount of information stored about each Activity will not fit on a single screen, the Activity window has been divided into nine cards. At the top of each is the header. This contains the Text and Type and an indication of whether the Activity has been approved (completed). There are nine named buttons ('tabs') in the header.

By clicking the tabs you can navigate between the cards, and always go directly to a certain card. The header is always visible, so you can always identify the Activity you are working with.

Header

Text A free text field to be used to describe the Activity.
This Text will be shown in the Day Planner, Task Manager and in the Personal Calendar report.

| | | |
|-------------|----------------------|--|
| Type | Paste Special | Activity Types setting, CRM module |
| | | <p>Enter an Activity Type by which this Activity can be classified. Each Activity Type should represent a specific job or task (e.g. sales call, sales appointment or internal meeting).</p> <p>Each Activity Type can in turn belong to an Activity Class (e.g. you might have a single Activity Class for all Types to do with sales, or all those to do with administration). The Activity Class will determine the colour of the bar representing this Activity in the Calendar, and can also force you to enter a Project, Customer, Result and/or a Cost (Time) (see below). It will also determine which Calendar Type will be selected by default.</p> <p>If an Item has been specified in the Activity Type record, this will be brought in to the Item field on the 'Project' card of the Activity. This will be useful when using Activities for time recording purposes: in this case the Item should be a Service Item representing the appropriate kind of labour that can be charged to the Customer.</p> |
| Done | | <p>This check box is used to mark the Activity as done or finished. Planned or scheduled Activities should be entered without checking the Done box. As you complete these Activities, check the Done box and perhaps enter some notes in the grid area on the 'Text' card. In this way, you can easily maintain a 'To Do' list: by default, Activities that have been marked as Done will not be shown in the Task Manager.</p> <p>Once an Activity has been marked as Done and saved, many fields such as the Start and End Dates and Times and the Person cannot be changed. If you realise that a Done Activity contains a mistake, open it and select 'Invalidate' from the Record menu. Red lines will be drawn through all the fields, and the Activity will be removed from the Calendar, Task Manager and all reports. Then click the [Duplicate] button in the Button Bar to create a new Activity without the mistake.</p> |

Time Card

| | | |
|--------------------|--|--------------|
| Start Time | Paste Special | Current Time |
| | The time when work on the Activity is to be or was started. The current time is filled in as a default. The 24-hour clock should be used. Once an Activity has been marked as Done and saved, the Start Time cannot be changed. | |
| Start Date | Paste Special | Current Date |
| | The date when work on the Activity is to be or was started. The current date is filled in as a default. Once an Activity has been marked as Done and saved, the Start Date cannot be changed. | |
| End Time | Paste Special | Current Time |
| | The time when work on the Activity was is to be or was finished. This field will gain a value automatically when a Result (below) is entered. Once an Activity has been marked as Done and saved, the End Time cannot be changed. | |
| End Date | Paste Special | Current Date |
| | The date when work on the Activity is to be or was finished. This field will gain a value automatically when a Result (below) is entered. Once an Activity has been marked as Done and saved, the End Date cannot be changed. | |
| Cost (Time) | <p>The overall time required to complete the Activity, calculated by Hansa once the Start and End Times and Dates have been completed. If this is not a true figure (perhaps there was a break for lunch, for example), it can be overwritten with the correct figure.</p> <p>If the Activity Type of this Activity belongs to an Activity Class whose Force Entry Of Time option is on, an entry must be made to this field before the Activity can be saved.</p> <p>Once an Activity has been marked as Done and saved, the Cost (Time) cannot be changed.</p> <p>The Cost (Time) is sometimes referred to as the Elapsed Time in this manual.</p> | |

Task Type Card

Task Type Use these options to specify the main purpose of the Activity—

Calendar Choose this option if the Activity is to appear in the Calendar and in the Employee Time Statistics report.

Typically, Calendar Activities are used for time management, scheduling and analysis. A Calendar Activity can represent either planned or actual time, and the Employee Time Statistics can be used to compare the two. If an Activity is to represent planned time, choose Profile from the Calendar Type options to the right. If it is to represent actual time, choose Time from those options. Choose Don't Show if the Activity is not to appear in the Calendar or the Employee Time Statistics report.

To Do Check this box if you would like this Activity it to be shown in the Task Manager. Usually this will be because the purpose of the Activity is to schedule a single task, such as a telephone call. The task is to be completed on a particular day, but the time is not important. To Do Activities will not be included in the Employee Time Statistics report. Instead, such Activities can be used to build up a contact history for each Customer.

Timed To Do Choose this option if the Activity is to appear in the right-hand panel of the Day Planner. Usually this will be because the purpose of the Activity is to schedule a single task for a specific time. Timed To Do Activities will not be included in the Employee Time Statistics report. Instead, such Activities can be used to build up a contact history for each Customer.

In all cases, if the Calendar Type to the right is Time or Profile, the Activity must have both Start and End Times before it can be saved. The Calendar Type has no other effect if the Task Type is To Do or Timed To Do.

Once an Activity has been marked as Done and saved, the Task Type and Calendar Type can still be changed, providing the Activity has both Start and End Times.

As an example of how these options will be used, imagine you decide to spend an afternoon making sales telephone calls. You will probably book the afternoon in advance by entering a single Activity covering the whole afternoon in which the Task Type is Calendar. This will appear in your Calendar in the appropriate colour, showing how the afternoon is to be spent. This Activity should have Profile chosen as its Calendar Type, since it represents planned time. Other members of the company will be able to view your Calendar and see that your time for the afternoon in question has been booked. When the afternoon's work is done, you will copy this Activity, change the times if necessary and change the Calendar Type to Time. This will allow the Employee Time Statistics report to compare planned time with actual time. Turning to the individual telephone calls that you wish to make during the afternoon, you may have scheduled some of these in advance by entering separate Activities for each call to be made in which the Task Type is To Do or Timed To Do. Each of these Activities will have a Customer, Contact and Telephone Number. You will probably start the afternoon's work by viewing a list of these calls in your Task Manager or Day Planner and you will work through them, recording the details of each call and possibly making new Activities for follow-on tasks. You might also create similar Activities (again with a Task Type of To Do) as and when you make unscheduled telephone calls (e.g. if it is a cold-calling exercise). As the calls are completed, you will check the Done box of the appropriate Activity. This will remove them from the Task Manager or Day Planner. Their remaining use will be to form part of the contact history of the Customer in question.

The Employee Time Statistics report can be used to analyse the number of hours worked by each employee. This report is compiled from Calendar Activities only. All such Activities are included in the time calculations in this report except those whose Calendar Type is Don't Show. In the example in the previous paragraph, therefore, the Activities representing the individual

telephone calls will not be shown in the Employee Time Statistics report, while the Time and Profile Activities representing the afternoon's work as a whole will. Provided the two sets of Activities are kept separated in this way (using the Task Type options), there is no risk of counting the afternoon's time twice in the report.

| | |
|----------------------|--|
| Calendar Type | These options are used to control how the Activity is shown in the Calendar. Usually these options apply only to Activities whose Task Type (above) is Calendar. The exception is that to charge the time to a Project, you must choose the Time option, but you can use any Task Type. These options can be changed once the Activity has been marked as Done and saved. |
| Time | <p>This option should be chosen in an Activity that represents actual time spent in carrying out a task. It will then appear in the Personal Calendar report together with its Cost (Time) and in the Calendar with a solid colour bar.</p> <p>If the Activity is one being entered to charge time to a Project, it must be a Time Activity, but it can be of any Task Type. Its Type must belong to an Activity Class whose Create Project Transaction box has been checked, a Project Transaction will be created when the Activity is marked as Done and saved. This Project Transaction is effectively an instruction to the 'Create Project Invoices' function to invoice the work represented by this Activity to the Customer. Please refer to the 'Job Costing' manual for full details about Project Transactions and the 'Create Project Invoices' function.</p> |
| Profile | This option can be used to book future time in the Calendar. Activities of this type appear in the Calendar as hollow coloured bars and to the left of those whose Time option has been selected. Time Activities have a solid colour bar. Profile Activities are shown on the Personal Calendar report with no Cost (Time). |
| Don't Show | Use this option if you don't want the Activity to be shown in the Calendar. It will still appear in the Personal Calendar report. Activities marked |




as Don't Show will not be included in the time calculations in the Employee Time Statistics report.

It can be difficult to return to a Don't Show Activity after it has been saved, because it does not appear in the Calendar. You can drill down to it from the Personal Calendar report, or you can use the 'Filter' card of the Task Manager. Choosing the correct Task Type option here will cause all Calendar Activities to be listed, even those marked as Don't Show.

If you specify an Activity Type that belongs to an Activity Class in an Activity, the Calendar Type will change to that set in the Activity Class. You can choose another Calendar Type in a particular Activity, but take care to note that another option may be selected if you then change the Activity Type.

Symbol Card

Symbol When an Activity is shown in the Task Manager, it can be accompanied by a small image so that you can see at a glance the type of work that it entails. The available images are—

- | | |
|-----------------|---|
| Call |  |
| Meeting |  |
| Deskwork |  |
| Other | (no image) |

Customer Card

| | | |
|-----------------|----------------------|--|
| Customer | Paste Special | Customers and Suppliers in Customer register |
|-----------------|----------------------|--|

Enter the Customer Number or use the 'Paste Special' function. When you press Return, the Customer or Supplier's name, Primary Contact and Telephone Number will be entered into the fields below. If you enter a Project on the 'Project' card (described below), the Customer details will be brought in automatically.

If the Activity Type of this Activity belongs to an Activity Class whose Force Entry Of Customer option is

on, an entry must be made to this field before the Activity can be saved.

By default, the 'Paste Special' list shows Customers. Click the [Suppliers] button if you need to see Suppliers.

The screenshot shows a window titled 'Paste Customer' with a blue header bar. Below the header, there are buttons for 'Operations', 'New', and 'Duplicate', along with a search field. A 'Suppliers' button is also visible. The main area contains a table with the following data:

| No. | Short | Cat | Name | Department | VAT No. |
|------|-------|-----|-----------------------------|------------|-------------|
| 001 | | 1 | Against All Odds Trading Co | | 2 |
| 0010 | | | Gdansk Shipyard | | |
| 0011 | | | EU Zone | | |
| 002 | | 2 | New World Import/Export Co | | |
| 003 | | 2 | Schmidt GmbH | | D4948304PQ2 |
| 004 | | | Oslo Trading Co | | |
| 005 | | | Moscow Trading Co | | |
| 006 | | | Estonian Export | | |

Name The Customer or Supplier Name is entered by Hansa after you have entered the Customer or Supplier Number.

Contact **Paste Special** Contact Person register, CRM module

Enter the name of a Contact Person or select one from the Contact Person register. The 'Paste Special' function only lists Contact Persons for the Customer in question. If a Contact has been entered to the Primary Contact field on the 'Contact' card of the Customer record, this will be brought in as a default.

Phone The Customer or Supplier's Telephone Number is entered by Hansa after you have entered the Customer or Supplier Number.

Result **Paste Special** Activity Types setting, CRM module

Enter an Activity Type to show the outcome of the Activity. When you press Tab or Return, the Current Date and Time will be brought into the End Date and End Time fields respectively, if they are empty. When the Activity is marked as Done and saved, Hansa will try to find an Activity Consequence record for the particular Activity Type/Result combination that has been used. If

one is found, a new Activity will be created, as determined by that Activity Consequence record.

If the Activity Type of this Activity belongs to an Activity Class whose Force Entry Of Result option is on, an entry must be made to this field before the Activity can be saved.

Project Card

| Time | Task Type | Symbol | Customer | Project | Service | Text | Persons | User values |
|------------|-----------|--------|----------|------------|---------|------|---------|-------------|
| Project: | | | | Inv. Item: | | | | |
| Resources: | | | | | | | | |

| | | |
|------------------|----------------------|--------------------------------------|
| Project | Paste Special | Project register, Job Costing module |
| Inv. Item | Paste Special | Item register |

If the Activity is one being entered for time recording purposes, specify here the Project on which the work was carried out, and an Item representing the type of work carried out. The Item should be a Service or Plain Item. Customer information will be brought in to the Activity from the Project automatically.

If the Activity is a Time Activity, its Type belongs to an Activity Class whose Create Project Transaction box has been checked, and a Cost (Time) has been entered to the Activity, a Project Transaction will be created when the Activity is marked as Done and saved. The Activity can have any Task Type. This Project Transaction is effectively an instruction to the 'Create Project Invoices' function to invoice the work represented by this Activity to the Customer. If you then invalidate the Activity, the Project Transaction will be deleted. You will not be able to invalidate the Activity if the Project Transaction has already been invoiced. Please refer to the 'Job Costing' manual for full details about Project Transactions and the 'Create Project Invoices' function.

If the Activity Type of this Activity belongs to an Activity Class whose Force Entry Of Project option is on, an entry must be made to the Project field before the Activity can be saved. If an Item has been specified in the Activity Type, it will be brought in to the Activity

automatically. If an Item has already been entered to the Activity, it will be changed or removed when an Activity Type is specified.

Resources**Paste Special**

Resource register, Resource Planning module

If the Activity is booking or otherwise concerned with a Resource, enter that Resource here. You can enter several Resources, separated by commas. For example, you can use an Activity to book the cleaning staff to clean a room.

Service Card

| Time | Task Type | Symbol | Customer | Project | Service | Text | Persons | User values |
|-------------------------------------|-----------|---------------------------------|----------|---------|---------|------|---------|-------------|
| Serial No.: <input type="text"/> | | Item: <input type="text"/> | | | | | | |
| Service Order: <input type="text"/> | | Inv. Item: <input type="text"/> | | | | | | |

Serial No.**Paste Special**

Known Serial Number register (Serial Numbers of sold Items and of Repair Items)

Item**Paste Special**

Item register

If the Activity is one being entered to record time spent working on a Service Order, specify here the Serial and Item Numbers of the Item being repaired. Please refer to the description of the Service Order and Inv. Item fields below on page 68 for details about how the work will be charged to the Service Order.

It is also possible to create Service Orders from Activities automatically. This might be useful where Customers tend to phone your business to book repairs. Your staff can use Activities to record the calls. Service Orders will be created automatically from those Activities thus saving work and reducing the possibility for error. First, you need to create an Activity Type for such calls. In the Activity Consequences setting, create a record for the Activity Type in combination with a particular Result and switch on the Generate Service Order option. When a call comes in, enter an Activity with the Activity Type and Result. Enter the Serial Number and Item Number of the Item that is to be repaired in these two fields, leaving the Service Order

field below empty. When the Activity is marked as Done and saved, a new Service Order will be created. Its Service Order Number will appear in the Service Order field below, and this can be quoted to the Customer if necessary.

If the Item being repaired is one originally sold by your business, entering the Serial Number will cause the Customer Number and Name and Item Number and Name to be brought in automatically. The Customer information can then be changed if the Item has been sold on. Note that the Serial No field is case-sensitive, so be sure to enter the correct combination of upper- and lower-case letters. If the Customer and Item information does not appear, this is the probable cause.

| | | |
|----------------------|----------------------|---|
| Service Order | Paste Special | Service Order register, Service Orders module |
| Inv. Item | Paste Special | Item register |

If the Activity is one being entered to record time spent working on a Service Order, specify here the Service Order on which the work was carried out, and an Item representing the type of work carried out. The Item should be a Service or Plain Item.

If the Activity is a Time Activity, its Type belongs to an Activity Class whose Create Work Sheet Transaction box has been checked, and you have entered a Serial Number in the field above and a Cost (Time) on the 'Time' card, a Work Sheet Transaction will be created when the Activity is marked as Done and saved. The Activity can have any Task Type. This Work Sheet Transaction is effectively an instruction to the 'Create Invoices' function on the Operations menu of the Service Order window to invoice the work represented by this Activity to the Customer. If you then invalidate the Activity, the Work Sheet Transaction will be deleted. You will not be able to invalidate the Activity if the Project Transaction has already been invoiced. Please refer to the 'Service Orders' manual for full details about Work Sheet Transactions and the 'Create Invoices' function.

If the Activity Type of this Activity belongs to an Activity Class whose Force Entry Of Service Order

option is on, an entry must be made to the Service Order field before the Activity can be saved. If an Item has been specified in the Activity Type, it will be brought in to the Activity automatically. If an Item has already been entered to the Activity, it will be changed or removed when an Activity Type is specified.

Text Card

Activity: Inspect

Operations

New

Duplicate

Cancel

Save

Text: Called about shipment

Type: SC

Done

Time

Task Type

Symbol

Customer

Project

Service

Text

Persons

User values

| | Code | Text |
|----|------|---|
| 1 | | Shipment No 943557346775467 has now arrived. |
| 2 | | Waiting in port in HK, will clear customs on 25/7 |
| 3 | | |
| 4 | | |
| 5 | | |
| 6 | | |
| 7 | | |
| 8 | | |
| 9 | | |
| 10 | | |
| 11 | | |
| 12 | | |
| 13 | | |
| 14 | | |
| 15 | | |
| 16 | | |
| 17 | | |
| 18 | | |
| 19 | | |
| 20 | | |

Code

Paste Special

Text Types setting, CRM module

The grid area is useful for making notes about the Activity. The Text Types setting can be used to bring in certain generic comments: alternatively, leave the Code field blank and simply type some *ad hoc* text in the Text field. There is space for several rows of notes.

Text

This field will contain the text for the Text Type. You may add any free text as appropriate.

If you need to enter more than one line of text, keep typing. The cursor will move to the next line automatically when necessary.

Persons Card
Persons**Paste Special**

Person register, System module

The Person doing the Activity. The initials of the current user are entered as a default.

If the Activity is to be carried out by more than one Person, enter all appropriate initials, separated by commas. It will appear in all their Calendar views, Task Managers and Personal Calendar reports.

If you need to use 'Paste Special' to enter several sets of initials, type the comma before opening the 'Paste Special' list. This will cause Hansa to add the next set of initials to those already entered. Otherwise, the previous initials will be overwritten.

You can also enter a Display Group here. If so, when you press Tab or Return, the Display Group will be replaced by the initials of every member of the Display Group. This might be useful for scheduling meetings etc that are to be attended by all members of a department. Display Groups are described in the 'System Module' manual.

If the Activity has an Activity Type that belongs to an Activity Class whose Create Project Transaction box has been checked, you can only specify a single Person here. This is because a Project Transaction will be created when the Activity is marked as Done and saved, and Project Transactions can only record the work of a single Person. If you use more than one Person in such an

Activity, you will be given the message “Only One Person Allowed” when you try to save the Activity.

Once an Activity has been marked as Done and saved, the Person cannot be changed.

| | | |
|-------------------|--|----------------------------------|
| Cc | Paste Special | Person register |
| | Enter the initials of anyone else that needs to know about the Activity (e.g. the person responsible for the Customer). Again, you can enter the initials of more than one Person, separated by commas, and you can also enter a Display Group. The Activity will appear in all their Calendar views and Personal Calendar reports, but it will only appear in their Task Managers if they so choose on the ‘Filter’ card. | |
| Supervisor | Paste Special | Person register |
| | Enter the initials of the Person ultimately responsible for this Activity here. The Activity will not appear in their Calendar, Personal Calendar report or Task Manager. | |
| Language | Paste Special | Languages setting, System module |
| | You can specify in the ‘Define Document’ window for the Activity document that Activities can be printed using different Forms depending on the Language of the Activity. Specify that Language here. | |
| Priority | You can grade the importance of each Activity using the Priority field. The Priority will be shown in the Task Manager, and you can reduce the list in the Task Manager so that it shows Activities with a particular Priority only. | |
| Private | Activities marked as Private will appear in your Personal Calendar and Activities, Customers reports, in the Task Manager and in any Calendar view when viewed by you, but not when viewed by any other user. They will also be excluded from most other reports when produced by other users. They can be viewed by users with access to the Activity register in the System module. | |
| | Once an Activity has been marked as Done and saved, the Private box can still be changed. | |

User Values Card

Please refer to the description of the User Defined Fields - Activities setting above on page 51 for details of this card.

Creating Activities from other Registers

Many Activities will be created remotely from Contracts, Customers, Customer Letters, Purchase Invoices, Quotations, Work Orders, Projects, Service Orders, Mails, Production records or Sales Orders using the 'Create Activity' Operations menu function. The Activity and the originating record will remain connected to each other through the Attachments facility. This allows you to open the originating record quickly and easily when reviewing the Activity, or to open the Activity from the originating record. When viewing the Activity or originating record, click the [Attachments] button (with the paper clip image) to open a list of attachments. Then double-click an item in this list to open it.

For example, the following Activity was created from a Quotation—

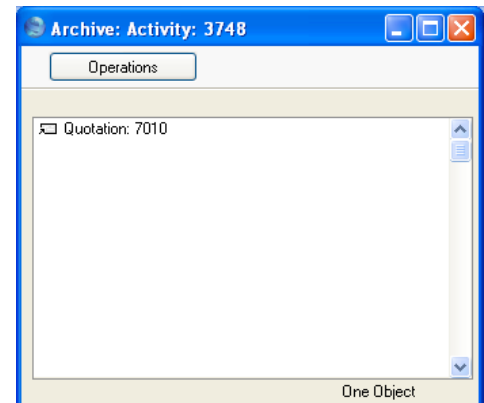
The screenshot shows the 'Activity: Inspect' window with the following fields and options:

- Operations:** New, Duplicate, Cancel, Save
- Text:** [Empty text box]
- Type:** Q1
- Done:** [Checkbox]
- Task Type:** Time, Task Type, Symbol, Customer, Project, Service, Text, Persons, User values
- Start Time:** [Empty text box]
- End Time:** [Empty text box]
- Cost (Time):** [Empty text box]
- Start Date:** 14/10/2004
- End Date:** 14/10/2004
- Task Type:**
 - ☐ Calendar
 - ☒ To Do
 - ☐ Timed To Do
- Calendar:**
 - ☐ Time
 - ☐ Profile
 - ☒ Don't Show
- Symbol:**
 - ☐ Call
 - ☐ Meeting
 - ☐ Deskwork
 - ☒ Other
- Customer:** 001
- Name:** Against All Odds Trading Co
- Contact:** Joseph Conrad
- Phone:** 01857 122544
- Result:** [Empty text box]

The [Attachments] button with the paper clip image shows that the Activity has at least one attachment—



Click this button to open a list of the objects attached to the Activity—



To open the Quotation, double-click the appropriate line in the list—

Quotation: Inspect

Operations New Duplicate Cancel Save

No.: 7010 Name: Against All Odds Trading Co
 Customer: 001 Project: ☐ Closed

| Date | Items | Currency | Del | Inv. Address | Del. Address | Job Costing |
|----------------------|--------------------------|---|-----|--------------|--------------|-------------|
| Date: 14/9/2004 | Valid Until: 14/10/2004 | Status: <input checked="" type="radio"/> Open <input type="radio"/> Accepted <input type="radio"/> Rejected | | | | |
| Pay. Terms: 30 | Make Contact: 14/10/2004 | | | | | |
| Our Ref.: 42 | Decision Date: | | | | | |
| Attn.: Joseph Conrad | Probability: | | | | | |
| Salesman: JNW | Quotation Class: A | Priority: | | | | |

| Item | Qty | Description | Unit Price | % | Sum |
|---------|-----|---------------|------------|---|-------|
| 1 10106 | 1 | CD Player | 71.00 | | 71.00 |
| 2 10105 | 1 | Cassette Deck | 56.00 | | 56.00 |
| 3 10110 | 1 | Amplifier | 90.00 | | 90.00 |
| 4 10104 | 1 | Loudspeakers | 15.00 | | 15.00 |
| 5 | | | | | |
| 6 | | | | | |
| 7 | | | | | |
| 8 | | | | | |
| 9 | | | | | |
| 10 | | | | | |
| 11 | | | | | |

Total GP: 143.70 VAT: 24.73 Sub-Total: 232.00
 Currency: GBP GP %: 61.9 Base: 256.73 TOTAL: 256.73

Completing an Activity

As you work your way through your Activities, you will want to mark off each one as completed. This will have the effect of building up an accurate contact history for the Customers concerned.

To do this, open the Activity and click the Done box. If necessary, enter a Result and press Tab or Return. The End Date and End Time will be filled in automatically. Change to the 'Text' card to record any comments about the carrying out of the task in the grid area. Click the [Save] button in the Button Bar to save the changes. Depending on how you have set up your Activity Consequences, a follow-up Activity may be created automatically.

Once an Activity has been marked as Done and saved, many fields such as the Start and End Dates and Times and the Persons cannot be changed. If you realise that a Done Activity contains a mistake, you can delete it by selecting 'Delete' from the Record menu.

However, if the Activity Type belongs to a Class whose Create Project Transactions or Create Worksheet Transaction box has been checked, the Activity cannot be deleted. In this case, you should open it and select 'Invalidate' from the Record menu. Red lines will be drawn through all the fields, and the Activity will be removed from the Calendar, Task Manager and all reports. Then click the [Duplicate] button in the Button Bar to create a new Activity without the mistake.

The Task Manager

The Task Manager is a list of Activities sorted by Start Date and Time. Its main purpose is to list Activities that have not yet been completed to provide a check list of tasks to be undertaken. By default, only To Do Activities are included in the list. Usually, these will be Activities representing short tasks, such as telephone calls, that are to be completed on a particular day.

From the Task Manager, you can open an Activity by double-clicking the Activity Text. You can then remind yourself of the details of the Activity before carrying it out. When the task has been completed, you can mark the Activity as Done. When you save the Activity, it will immediately and automatically be removed from the Task Manager. If, as a result of carrying out the Activity, you need to schedule another one for a future time, this can also be done from the Task Manager.

To open the Task Manager, click the [Tasks] button in the Master Control panel—



The Task Manager for the current user (i.e. the Person signed in to Hansa for this work session) is opened, showing To Do Activities in Start Date and Time order. These are Activities whose Start Dates are the current date or earlier and whose Done boxes are not checked.

| Prio | Done | Text | Supervisor | Phone |
|------|--------------------------|---|---------------|-------------------|
| 1 | <input type="checkbox"/> | Call to follow up quotation | Joseph Conrad | 01857 122544 |
| 2 | <input type="checkbox"/> | Remember Dinner at Mike's 19:30 | FF Personal | |
| 3 | <input type="checkbox"/> | Sales Visit 11:30 Interested in multi-room stereo system | Mrs Magnusson | 00 47 12 34 56 78 |
| 4 | <input type="checkbox"/> | Dentist 14:30 | FF Personal | |

Header

Person, Type, Customer, Priority

If the list of Activities is a long one, you can reduce it to show Activities of a particular Person, Type, Customer and/or Priority in any combination using the fields above the list. For example, to list sales calls, enter the appropriate Activity Type in the Type field and press Tab or Return. To further reduce the list to show top priority sales calls, enter the appropriate Priority Code in the Priority field and press Tab or Return once more.

Your own Private Activities will be shown, but those of other users will not.

You can use 'Paste Special' from the Person, Type and Customer fields to ensure the correct entry.

Activities Card

The main part of the Task Manager is a list of the Activities that are to be carried out by the end of the day (including Activities from previous days that have not been completed). Activities that have been marked as Done are not shown. The Activities are sorted by Start Date and Time, but you can change this by clicking on one of the column headings.

You can change the composition of this list in two ways—

1. You can use the fields in the header as described above.
2. You can use the radio buttons on the 'Filter' card (described below) to add to the list Activities that would not be shown by default (e.g. Done Activities or Activities whose Task Types are not To Do).

Prio This column shows the Priority of each Activity (taken from the field on the 'Persons' card), and it also shows a small image determined by the Symbol option chosen for each Activity.

Done This column can be used to mark an Activity as Done once it has been completed. This will not be fed through to the corresponding Activity immediately: you must save the Task Manager (by clicking the [Save] button, by pressing the Shift-Enter key combination or by selecting 'OK' from the Record menu) in order to mark Activity as Done and to remove it from the Task Manager list. You can mark several rows as Done before saving.



If you have marked any Activities as Done, remember to save the Task Manager before closing it.

If you have used the options on the 'Filter' card (described below) to include Done Activities in the list, they will be shown with a tick (✓) in the Done column.

Text This column contains the Text from the header of each Activity. Double-click this Text to open the Activity record.

There will be a small arrow to the left of this Text if any notes and comments have been entered on the 'Text' card of an Activity. Click this arrow to read the comments. This has been done in the fourth row in the illustration above.

Supervisor This column contains the Supervisor from the 'Persons' card of each Activity. If the Supervisor is empty, the Contact or Customer Name from the 'Customer' card is shown.

Phone This column shows the Customer or Supplier Telephone Number from the 'Customer' card of each Activity.

Filter Card

Francoise French - Task Manager

Day Planner New Task Save

Person: FF Type: Customer: Priority:

Filter

Select

- ☒ All
- ☐ Calls
- ☐ Meetings
- ☐ Deskwork

Task Type

- ☒ To Do
- ☐ To Do, Calendar
- ☐ To Do, Timed
- ☐ All

Display

- ☒ Up To Today
- ☐ Next Week's
- ☐ Next Month's
- ☐ All

Incl. Done

- ☒ None
- ☐ Month
- ☐ Year
- ☐ All

Persons

- ☒ Main
- ☐ CC
- ☐ All

| Prio | Done | Text | Supervisor | Phone |
|------|--------------------------|---|---------------|-------------------|
| 1 | <input type="checkbox"/> | Call to follow up quotation | Joseph Conrad | 01857 122544 |
| 2 | <input type="checkbox"/> | Remember Dinner at Mike's 19:30 | FF Personal | |
| 3 | <input type="checkbox"/> | Sales Visit 11:30 Interested in multi-room stereo system | Mrs Magnusson | 00 47 12 34 56 78 |
| 4 | <input type="checkbox"/> | Dentist 14:30 | FF Personal | |

Number of Activities: 4

By default, the Activities listed in the Task Manager have Task Types of To Do, are not Done and have Start Dates that are on or before the current date. Use the 'Filter' tab (in combination with the fields in the header) if you would like to change these settings.

- Select** Use one of these options to list Activities with different Symbols.
- Task Type** Use one of these options to list Activities with different Task Types.
- Display** Use one of these options to list Activities with different Start Dates. The Next Week and Next Month options do not include the current date.
- Incl. Done** Choose one of these options if you would like Done Activities to be listed (in addition to those that are not Done). The Done Activities will be marked with a tick in the Done column. You can choose to include all Done Activities, or those whose Start Dates are in the past month or year.
- Persons** By default, the Task Manager lists the Activities entered for the Person whose initials appear in the header. This means those Activities with these initials in their Persons fields. Use these options to change this to the Activities

with these initials in their Cc fields, or in both their Persons and Cc fields.

Button Bar

The Button Bar contains three buttons, as follows—

| | |
|--------------------|--|
| Day Planner | Click this button to open the Day Planner. The Day Planner is described on page 84 below. |
| New Task | Click this button to create a new Activity. Its Task Type will be To Do, and its Symbol will be Other. You can also use the Ctrl-N or ⌘-N keyboard shortcut. When you save the new Activity, it will immediately and automatically be added to the Task Manager, providing it meets your chosen filter criteria. |
| Save | If you have marked a row in the Task Manager as Done, this will not be fed through to the corresponding Activity immediately. To do this, you must save the Task Manager by clicking the [Save] button. You can mark several rows as Done before saving. The [Save] button does not close the Task Manager. |

Printing the Task Manager

To print a list of the Activities shown in the Task Manager, choose 'Print' from the File menu.

The Calendar

Opening the Calendar

The Calendar is useful for booking employees' time and for analysing employee time statistics. Every member of the company can see a particular individual's Calendar, so its graphical format makes it easy to check employees' availability and to schedule major tasks. Numerous reports (e.g. the Personal Calendar report, the Employee Time Statistics report and the Activities, Period report) are compiled using Calendar Activities and these again are useful scheduling and time analysis tools.

To open the Calendar, click the [Calendar] button in the Master Control panel—



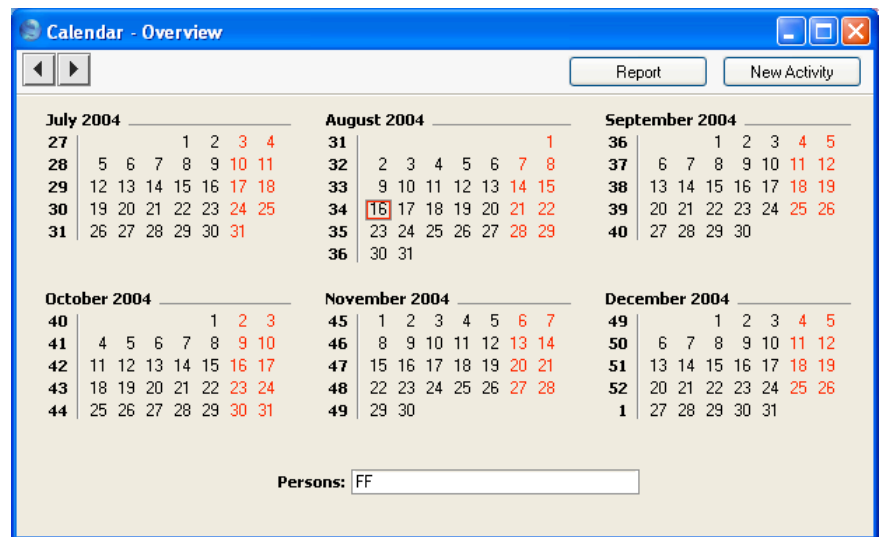
When it opens, the Calendar shows the current month in the centre of the top row, the previous month and the next four months. This six-monthly format is one of the four ways of viewing the Calendar in Hansa. These four views are—

- The six-monthly view (known as the “Overview”)
- The monthly view
- The weekly view
- The daily view (known as the “Day Planner”)

The Four Calendar Views

The Six-monthly View (the “Overview”)

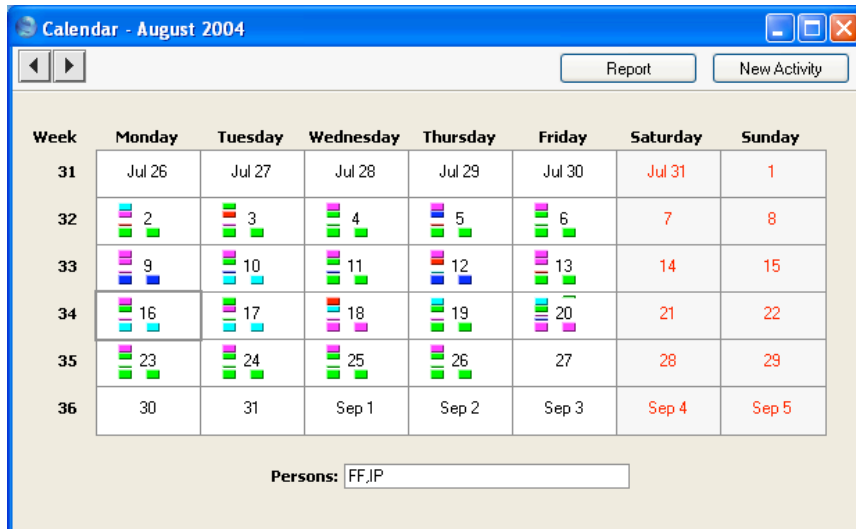
In the Overview, the current date (August 16th in the illustration) is marked with a square and weekends are red.



- To open the Overview, click the [Calendar] button in the Master Control panel.
- To change the months shown, use the 'Next' and 'Previous' functions on the Record menu or the equivalent buttons on the left of the Button Bar.
- To open a monthly view, double-click on the name of any month.
- To open a weekly view, double-click on the number of any week.
- To open the Day Planner, double-click on any date.
- To close the Overview, use the close box.

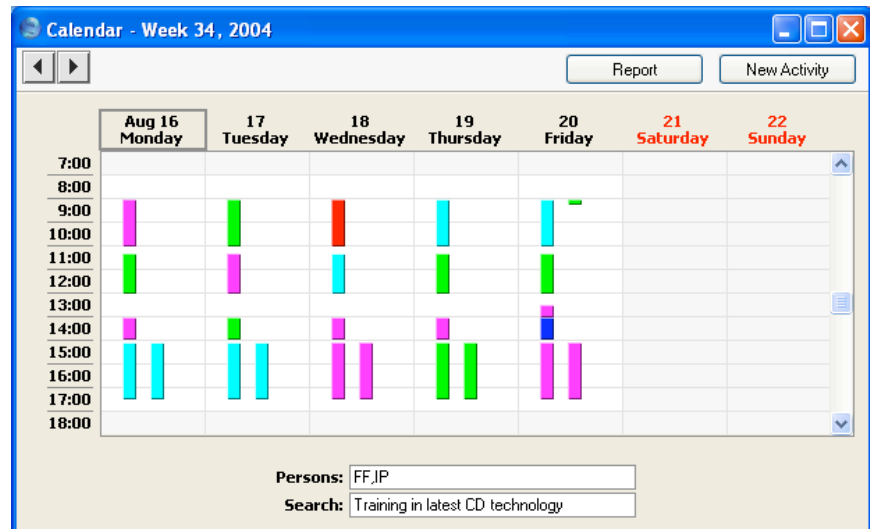
The Monthly View

In the monthly view, the current date (August 16th in the illustration) is marked with a thick border. Weekends shaded, with dates in red.



- To open the monthly view, double-click any month name in the Overview.
- To change the month shown, use the 'Next' and 'Previous' functions on the Record menu or the equivalent buttons on the left of the Button Bar.
- To open a weekly view, double-click on the number of any week.
- To open the Day Planner, double-click on any date.
- The Activities for each day are represented by coloured bars. These are solid for Time Activities and hollow for Profile Activities. Double-click any coloured bar to open the Activity. The colours are determined by the Activity Class of each Activity. Only Calendar Activities are shown.
- Activities for more than one Person can be shown. Enter each Person's initials (use 'Paste Special' if necessary) separated by commas in the Persons field and press the Return key. A separate column of coloured bars is shown for each Person. The left-hand column belongs to the first Person named in the Persons field and the right-hand column to the last Person. Your Private Activities are shown, but those of other Persons are not.
- To close the monthly view, use the close box.

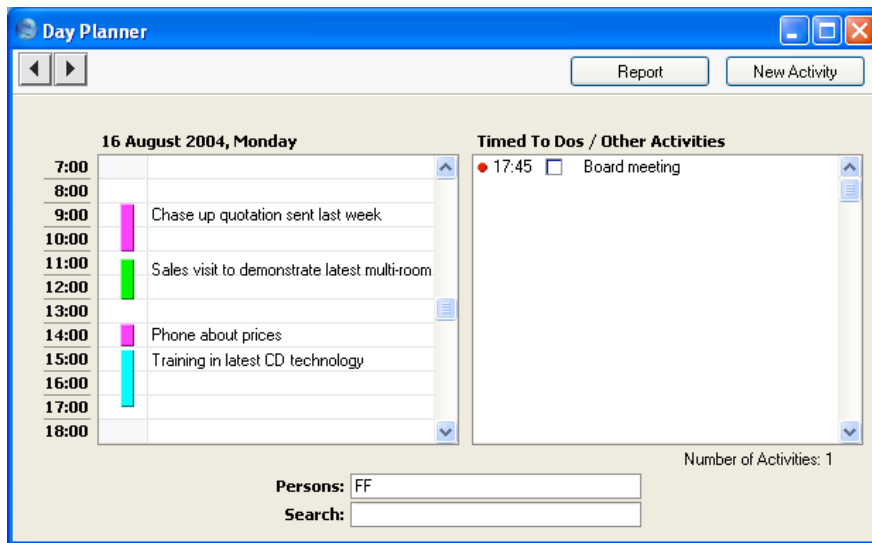
The Weekly View



- To open the weekly view, double-click any week number in the Overview or monthly view.
- To change the week shown, use the 'Next' and 'Previous' functions on the Record menu or the equivalent buttons on the left of the Button Bar.
- To move to an earlier or later part of the day, use the scroll bar on the right-hand side of the window. Activities beginning at a time too early to be shown have an arrow at the top of their coloured bar, while those ending too late to be shown have an arrow at the bottom of their bar.
- To open the Day Planner, double-click on any date.
- The Activities for each day are represented by coloured bars. These are solid for Time Activities and hollow for Profile Activities. Double-click any coloured bar to open the Activity, or click once for its Text to appear in the Search field. The colours are determined by the Activity Class of each Activity. Only Calendar Activities are shown.
- Activities for more than one Person can be shown. Enter each Person's initials (use 'Paste Special' if necessary) separated by commas in the Persons field and press the Return key. A separate column of coloured bars is shown for each Person. The left-hand column belongs to the first Person named in the Persons field and the right-hand column to the last Person. Your Private Activities are shown, but other Persons' are not.

- You can move an Activity to another time and/or date by dragging and dropping, providing the Activity has not been marked as Done.
- To close the weekly view, use the close box.

The Daily View (the “Day Planner”)



- To open the Day Planner, double-click any date in the Overview or in the monthly or weekly views, or click the [Day Planner] button in the Task Manager.
- To change the day shown, use the ‘Next’ and ‘Previous’ functions on the Record menu or the equivalent buttons on the left of the Button Bar.
- The Day Planner is divided into two sections. The panel on the left contains the day’s Calendar Activities, represented by coloured bars. These are the same Activities that were visible in the monthly and weekly views. The coloured bars are solid for Time Activities (the first Activity in the illustration above) and hollow and to the left for Profile Activities (the second, third and fourth in the illustration). Double-click any coloured bar to open the Activity, or click once for its Text to appear in the Search field. The colours are determined by the Activity Class of each Activity. Only Calendar Activities are shown.
- To move to an earlier or later part of the day, use the scroll bar on the right-hand side of the left-hand panel. Activities beginning at a time too

early to be shown have an arrow at the top of their coloured bar, while those ending too late to be shown have an arrow at the bottom.

- Activities for more than one Person can be shown in the left-hand panel. Enter each Person's initials (use 'Paste Special' if necessary) separated by commas in the Persons field and press the Return key. A separate column of coloured bars is shown for each Person. The left-hand column belongs to the first Person named in the Persons field and the right-hand column to the last Person. Your Private Activities are shown, but those of other Persons are not.
- The panel on the right lists Timed To Do Activities. This list only contains Activities for the Person whose initials appear first in the Persons field. As usual, your Private Activities are shown, but those of other Persons are not.
- In the right-hand panel, double-click the Activity Text to open an Activity.
- The check boxes in the Done column in the right-hand panel can be used to mark each Activity as Done once they have been completed. This will not be fed through to the corresponding Activity immediately: you must save the Day Planner (by pressing the Shift-Enter key combination or by selecting 'OK' from the Record menu) in order to mark Activity as Done. You can mark several rows as Done before saving.



If you have marked any Activities as Done, remember to save the Day Planner before closing it or changing to a different day.

- To close the Day Planner, use the close box.

The [New Activity] button

Click the [New Activity] button in any Calendar view to enter a new Activity record. The Task Type in the new Activity will be Calendar, and the Symbol will be Other. The Person(s) in the Persons field of the Calendar view will be copied to the Persons field of the Activity. Please refer to the section entitled 'The Activity Register' above on page 55 for full details.

The [Report] button

Click the [Report] button in any Calendar view to produce a Personal Calendar report. Please refer to the 'Personal Calendar Report' section below on page 87 for full details.

If there are no Week Numbers

If dashes appear instead of Week Numbers in any of your Calendar views, the probable cause is that there is no record in the Weeks setting in the System module, or the record that is there is incomplete. In the latter case, if the current year has already been entered and the dashes remain, it is recommended that you delete the existing record and enter a new one, ensuring that the Country Code entered in the Weeks record is the same as that on the 'Reg' card of the Company Info setting. The Weeks setting is described in the 'System Module' manual.

The Personal Calendar Report

The Personal Calendar report is effectively a report version of the Calendar. As with the Calendar, it shows Calendar Activities only. They are sorted into Start Date and Start Time order.

When printed to screen, the Personal Calendar has Hansa's Drill-down feature. Click on the Start Time or Activity Text of any Activity in the report to open that Activity.

To open the Personal Calendar report, click the [Report] button in the top right-hand corner of any Calendar view. The Personal Calendar is immediately printed to screen. The report period and Person are taken from the Calendar view from where the report was created. For example, if the report was produced from a weekly view, the report period will be the week shown in the view. The Activities shown will be those shown in the Calendar, with two exceptions: if the initials of more than Person are shown in the Calendar view separated by commas, the report will only show those Activities common to all those Persons, not all Activities for all Persons; and Activities marked as Don't Show, which are not shown in the Calendar, are shown in the report. As in the Calendar, your Private Activities are shown, but those of other Persons are not. For Time Activities, the Cost (Time) (i.e. the time taken to complete the Activity, or elapsed time) will be shown (together with a total at the bottom); no elapsed time will be shown for Profile Activities. The elapsed time figure shows partial hours as decimals, not as numbers of minutes. If an Activity has been marked as Done, "OK" will be shown to the right of the elapsed time.

| Personal Calendar | | | |
|-------------------------|---|------------------------------------|------|
| Operations | | Search | |
| Personal Calendar | | Hansa, Print date: 16/8/2004 15:09 | |
| Radio Import/Export Ltd | | Period 16/8/2004 : 16/8/2004 | |
| | | FF | |
| New Activity | Comment | Contact | |
| 16/8/2004 | | | |
| 09:00:08 | 11:00:00 Chase up quotation sent last week | | 2.00 |
| 11:20:31 | 13:00:00 Sales visit to demonstrate latest multi-room stereo system | | |
| | 008 | Mrs Williamson | 2.12 |
| | The American Dream Inc Company: The American Dream Inc Tel: 01768 868766 Contact: Mrs Williamson | | |
| 14:00:02 | 14:59:00 Phone about prices | Marcel Du Pont | 1.63 |
| | 007 | 00 33 1 2345 6789 | |
| | Du Pont et cie Company: New World Import/Export Co Tel: 00 852 776 1234 Contact: Li Wuan Sok | | |
| 15:05:27 | 17:30:00 Training in latest CD technology | | 2.70 |
| | In training room | | |
| Number of Activities | | Total Time | 8.45 |

This screen version of the report contains a number of text buttons, as follows—

New Activity Click this text (just underneath the report header) to create a new Activity. Its Task Type will be Calendar and its Symbol will be Other. On saving and closing the new Activity and returning to the report, select 'Recalculate' from the Operations menu. The new Activity will then be shown in the report, providing you did not change its Task Type.

Start Time, Activity Text

Click the Text of any Activity to open that Activity record.

To print the Personal Calendar to a printer, first print it to screen and then click the Printer icon or select 'Print' from the File menu.

You can also produce the Personal Calendar report by clicking the [Reports] button in the Master Control panel (or by selecting 'Reports' from the File menu) and then double-clicking 'Personal Calendar' in the 'Reports' list.

The Target Time Register

As described in the example at the beginning of this manual, Profile Activities have two purposes: they enable the booking of future time, and they allow this booked time to be compared with the time actually taken to complete the task in question. Profile Activities tend to be used in relation to specific tasks (for example, when sales appointments are booked, you will usually create separate Profile Activities booking the time for each appointment). Since their Task Type is Calendar, they are visible in the Calendar, so all employees can see that the time of the Person concerned has been booked.

The Target Time register can also be used to compare planned with actual time. In this register, the planned time is not related to specific tasks, and there is no impact on the Calendar.

Usually, Profile Activities will be used by the employees themselves to book future time, while the Target Time register will be used by managers to set targets for the amount of time their employees are to spend on work of each Activity Type. For example, the Target Time register might be used to specify that a sales person should spend 30 hours per week selling and 10 hours on administration. The sales person will create Profile Activities for each future sales appointment and Time Activities once those appointments have been fulfilled. The Employee Time Statistics report (described below on page 174) can then be used to compare Target Time with Profile Activities, Target Time with Time Activities, or Profile Activities with Time Activities. An Activity must have a Task Type of Calendar to be included in this report.

Because the Target Time register is not related to specific tasks, it does not require much maintenance. In the example of the sales person in the previous paragraph, only one Target Time record is required. The targets in this record will be used every week by the Employee Time Statistics report. It will only be necessary to enter a second Target Time record if the number of hours to be spent on each Activity Type changes (e.g. to 25 hours per week selling, 10 hours on administration and five hours sales management).

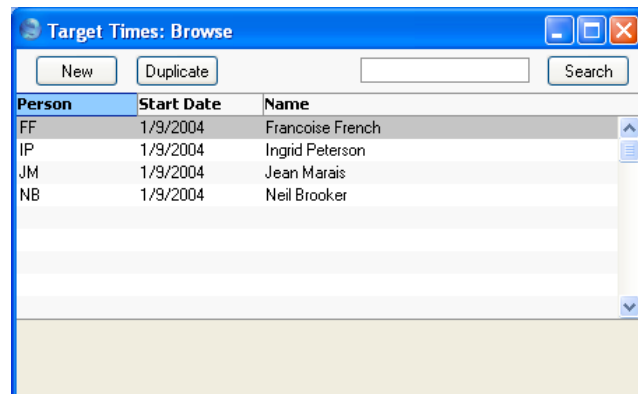
The period covered by a Target Time record can be a day, a week, a month or any other period of your choice. When the Employee Time Statistics report is produced, the number of hours in the Target Time record will be adjusted proportionally to fit in with the report period. In the example above, the period is a week. If the Employee Time Statistics report is produced with a report period of one week, the number of hours in the Target Time record will be shown in the report. If the report period is one month, the figure

shown in the report will be the number of hours from the Target Time record multiplied by four. If the report period is one year, the number of hours will be multiplied by 52.

Entering Target Time Records

1. In the CRM module, select 'Target Time' from the Registers menu (or click [Target Time] in the Master Control panel).

The 'Target Times: Browse' window is opened, listing the records that have already been entered.



2. Click [New] in the Button Bar or select a Target Time record similar to the one you want to enter and click [Duplicate] in the Button Bar.

The 'Target Time: New' window is opened, empty if you clicked [New] or containing a duplicate of the highlighted Target Time record.

Target Time: Inspect

Person: FF Start Date: 1/9/2004

Name: Francoise French

| | Act Type | Text | Period of Days | Hours |
|----|----------|-------------|----------------|-------|
| 1 | A | Admin | 7 | 8 |
| 2 | SV | Sales Visit | 7 | 24 |
| 3 | SC | Sales Call | 7 | 8 |
| 4 | | | | |
| 5 | | | | |
| 6 | | | | |
| 7 | | | | |
| 8 | | | | |
| 9 | | | | |
| 10 | | | | |
| 11 | | | | |
| 12 | | | | |
| 13 | | | | |
| 14 | | | | |
| 15 | | | | |
| 16 | | | | |
| 17 | | | | |
| 18 | | | | |
| 19 | | | | |
| 20 | | | | |
| 21 | | | | |
| 22 | | | | |

Person**Paste Special**

Person register, System module

Enter the initials of the Person for whom you are setting targets, or use the 'Paste Special' function. When you press Return, the Person's name will be entered to the field below.

Name

The Person's Name is entered after you have entered their initials.

Start Date**Paste Special**

Current Date

Specify here the date when the Target Time record is to take effect. It will remain in effect until a new Target Time record with a later Start Date is entered. Only one record for each Person/Date combination can be entered.

- Use the grid area of the screen to specify the number of hours that it is intended that the Person will spend carrying out work of each Activity Type.

The Target Time record in the illustration above has a period of one week (shown in the Period of Days field). It specifies that every week the employee is to spend eight hours doing administration, 24 hours making sales visits and eight hours making sales calls.

| | | |
|-----------------|----------------------|---|
| Act Type | Paste Special | Activity Types setting, CRM module |
| | | Enter an Activity Type for which a target is to be set. |
| Text | | The Name of the Activity Type is entered after you have entered the Code. |

Period of Days, Hours

The Period of Days is the period covered by the Target Time row, while Hours is the number of hours during that period to be spent carrying out work belonging to the Activity Type.

For example, if an employee is to spend eight hours per week working on administration, enter “7” as the Period of Days and “8” in the Hours field. If the Period of Days is “1”, the target will be eight hours per day.

Both these fields must contain an entry in a particular row, otherwise the row will be ignored by the Employee Time Statistics report.

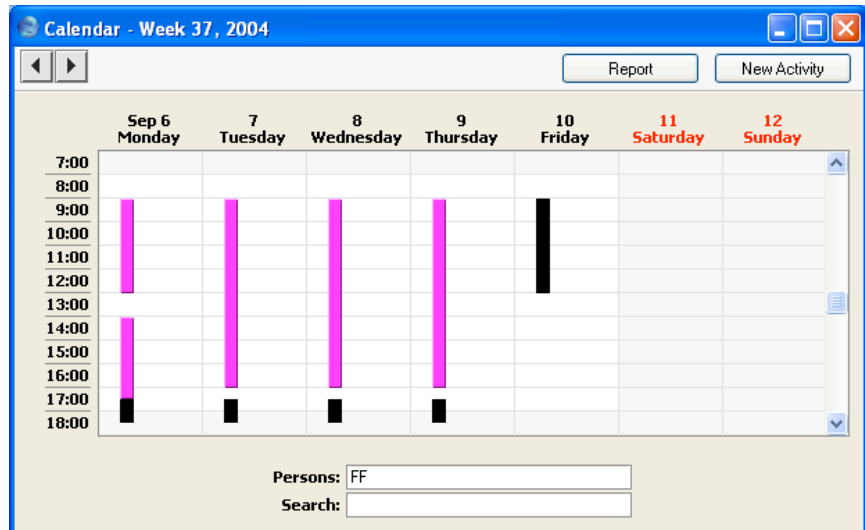
It is recommended that you use seven or a multiple of seven as the Period of Days. This will ensure that Employee Time Statistics report produces accurate results taking weekends into account. If you set daily targets, the report will apply these targets to Saturday and Sunday. If you enter “5” as the Period of Days, the report will contain incorrect targets if the report period is longer than five days.

4. Once the Target Time record is complete, save it by clicking the [Done] button in the Button Bar. You can return to it at any time if you need to make changes.

Using Target Time Information

Each Target Time record contains targets for one Person for a period of time. In the example illustrated above, that period of time is a week. These targets will apply every week until a new Target Time record is entered.

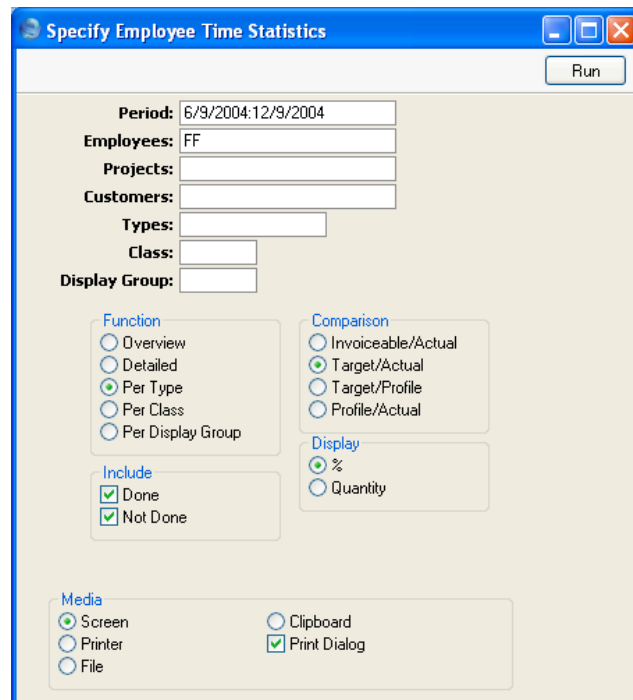
Each Person should record the work actually carried out by entering Activities as described earlier in this manual. Continuing the example shown in the illustration above, when the employee in question (Françoise French) spends a day making sales telephone calls, she should enter an Activity recording the details of her day's work. For the example, Françoise enters Time Activities where the Task Type is Calendar recording her work as the week progresses. They are visible in Françoise's Calendar—



As always with Activities, a consistent and planned approach to the Calendar Type options (Time, Profile and Don't Show) is recommended. This process can be helped by attaching each Activity Type to an Activity Class in which the correct option has been selected. This will mean that Activities with a particular Type will always have the same Calendar Type selected by default, reducing the chances of error (i.e. ensuring they will be taken into account correctly by the various reports).

At the end of the week, an Employee Time Statistics report can be produced. This report in the CRM module can compare the target time recorded in the Target Time register either with actual time recorded using Time Activities or with planned time recorded using Profile Activities. The accuracy of this comparison relies on the correct Calendar Type (Time or Profile) being selected as appropriate, and on the Task Type being set to Calendar in these Activities.

In the specification window for the report, the week in question is entered as the report period and Françoise's initials are entered in the Employee field. In the example, we will compare Target Time with actual time, so Target/Actual is chosen as the Comparison —



Specify Employee Time Statistics

Run

Period: 6/9/2004:12/9/2004

Employees: FF

Projects:

Customers:

Types:

Class:

Display Group:

Function

☐ Overview

☐ Detailed

☒ Per Type

☐ Per Class

☐ Per Display Group

Comparison

☐ Invoiceable/Actual

☒ Target/Actual

☐ Target/Profile

☐ Profile/Actual

Include

☒ Done

☒ Not Done

Display

☒ %

☐ Quantity

Media

☒ Screen

☐ Printer

☐ File

☐ Clipboard

☒ Print Dialog

To make the comparison, the report searches for Activities whose Start Date falls in the report period and for the Target Time record applying during the report period. This is the Target Time record with the most recent Start Date prior to the report period. The Per Type version of the report provides a concise analysis of the hours spent working on each Activity Type—

Employee Time Statistics

Operations

Search

Employee Time Statistics

Hansa, Print date: 14/9/2004 16:42

Radio Import/Export Ltd

Period 6/9/2004 : 12/9/2004

Per Activity Type

Employee FF

Target/Actual

| Employee | Act. Type | Target Time | Actual | Tot. % | Diff % |
|----------|------------------|-------------|--------|--------|--------|
| FF | Francoise French | | | | |
| SC | Sales Call | 8.00 | 7.50 | 18.99 | -6% |
| A | Admin | 8.00 | 8.00 | 20.25 | 0% |
| SV | Sales Visit | 24.00 | 24.00 | 60.76 | 0% |
| | Total | 40.00 | 39.50 | 100.00 | |
| A | Admin | 8.00 | 8.00 | 20.25 | 0% |
| SC | Sales Call | 8.00 | 7.50 | 18.99 | -6% |
| SV | Sales Visit | 24.00 | 24.00 | 60.76 | 0% |
| | Total | 40.00 | 39.50 | 100.00 | |

Number of employees in list: 1

The Diff % column in the report shows that Françoise met her targets for Admin and Sales Visits, but fell slightly short of her target for Sales Calls. The Tot % column shows the percentage of actual time spent on each Activity Type.

For the next week, there is no need to enter a new Target Time record, providing the duties of the employee have not changed. The original record will be used by the report once again. Françoise continues entering Time Activities to record the work carried out. The report for the second week can be produced as described above.

A report can also be produced for the two-week period —

| Employee Time Statistics | | | | | |
|--------------------------------|------------------|-------------|------------------------------------|--------|--------|
| Operations | | | Search | | |
| Employee Time Statistics | | | Hansa, Print date: 14/9/2004 16:49 | | |
| Radio Import/Export Ltd | | | Period 6/9/2004 : 19/9/2004 | | |
| Per Activity Type | | | Employee FF | | |
| | | | Target/Actual | | |
| Employee | Act. Type | Target Time | Actual | Tot. % | Diff % |
| FF | Francoise French | | | | |
| | SC Sales Call | 16.00 | 15.50 | 19.50 | -3% |
| | A Admin | 16.00 | 15.75 | 19.81 | -1% |
| | SV Sales Visit | 48.00 | 48.25 | 60.69 | +0% |
| | Total | 80.00 | 79.50 | 100.00 | |
| | A Admin | 16.00 | 15.75 | 19.81 | -1% |
| | SC Sales Call | 16.00 | 15.50 | 19.50 | -3% |
| | SV Sales Visit | 48.00 | 48.25 | 60.69 | +0% |
| | Total | 80.00 | 79.50 | 100.00 | |
| Number of employees in list: 1 | | | | | |

In this report, the Target Time is calculated using the formula—


$$\text{Target Time} = \frac{\text{Hours (from Target Time row)} \times \text{days in report period}}{\text{Period of Days (from Target Time row)}}$$

For example, the Target Time for Sales Visits is $24 \times 14/7 = 48$.

So a single Target Time record covering one week has been extended so that it applies to the whole two-week period.

On Wednesday in the third week, Françoise's duties change. The eight hours per week that she did spend making sales calls is now to be spent on sales management. A new Target Time record is entered for her, dated Wednesday 22nd September—

Target Time: Inspect

Person: Start Date: 

Name:

| | Act Type | Text | Period of Days | Hours |
|----|----------|-------------|----------------|-------|
| 1 | A | Admin | 7 | 8 |
| 2 | SV | Sales Visit | 7 | 24 |
| 3 | SM | Sales Call | 7 | 8 |
| 4 | | | | |
| 5 | | | | |
| 6 | | | | |
| 7 | | | | |
| 8 | | | | |
| 9 | | | | |
| 10 | | | | |
| 11 | | | | |
| 12 | | | | |
| 13 | | | | |
| 14 | | | | |
| 15 | | | | |
| 16 | | | | |
| 17 | | | | |
| 18 | | | | |
| 19 | | | | |
| 20 | | | | |
| 21 | | | | |
| 22 | | | | |

The Employee Time Statistics report for this third week shows the change. The report still contains a target for sales calls, for the first two days of the week, because the new Target Time did not take effect until Wednesday. Similarly, the target for sales management is reduced proportionally because this applied to the second half of the week only —

| Employee Time Statistics | | | | | |
|--------------------------------|------------------|-------------|------------------------------------|--------|--------|
| Operations | | | Search | | |
| Employee Time Statistics | | | Hansa, Print date: 14/9/2004 17:02 | | |
| Radio Import/Export Ltd | | | Period 20/9/2004 : 26/9/2004 | | |
| Per Activity Type | | | Employee FF | | |
| | | | Target/Actual | | |
| Employee | Act. Type | Target Time | Actual | Tot. % | Diff % |
| FF | Francoise French | | | | |
| SC | Sales Call | 2.29 | 4.25 | 10.63 | +85% |
| SM | Sales Management | 5.71 | 3.75 | 9.38 | -34% |
| A | Admin | 8.00 | 7.75 | 19.38 | -3% |
| SV | Sales Visit | 24.00 | 24.25 | 60.63 | +1% |
| Total | | 40.00 | 40.00 | 100.00 | |
| A | Admin | 8.00 | 7.75 | 19.38 | -3% |
| SC | Sales Call | 2.29 | 4.25 | 10.63 | +85% |
| SM | Sales Management | 5.71 | 3.75 | 9.38 | -34% |
| SV | Sales Visit | 24.00 | 24.25 | 60.63 | +1% |
| Total | | 40.00 | 40.00 | 100.00 | |
| Number of employees in list: 1 | | | | | |

This new Target Time record will be used to set Françoise's targets from September 22nd onwards, until her duties change once more. Both Target Time records will be used when the Employee Time Statistics report is produced for the month of September.

The Customer Letter Register

This register is used to send letters to Customers: it provides a mechanism whereby standard or *ad hoc* letter texts can be matched with one or more addresses. Letters can thus be sent to individual Customers or mailshots produced to a range of Customers.

Entering a Customer Letter

In the CRM module, select 'Customers Letters' from the Registers menu, or click the [Customer Letters] button in the Master Control panel.

The 'Customer Letters: Browse' window is opened, showing records already entered.

| No. | Date | Cust. | Name | Contact | Cat. | Header | OK |
|-----|------------|---------|--------------------------------|---------|-------|------------------|----|
| 101 | 23/2/2004 | | | | | Re your recent e | ✓ |
| 102 | 28/5/2004 | | | | | | |
| 103 | 27/6/2004 | 002 | New World Import/E:Li Wuan Sok | | | | ✓ |
| 104 | 28/7/2004 | 001:009 | Against All Odds Trac | | | | ✓ |
| 105 | 28/8/2004 | 001:009 | Against All Odds Trac | | ONACC | | ✓ |
| 106 | 26/9/2004 | 001:009 | Against All Odds Trac | | | Autumn Special | ✓ |
| 107 | 28/10/2004 | 001:009 | Against All Odds Trac | | | | ✓ |

To enter a new Letter, click [New] in the Button Bar or use the Ctrl-N (Windows and Linux) or ⌘-N (Macintosh) keyboard shortcut. Alternatively, select a Letter similar to the one you want to enter and click [Duplicate] on the Button Bar.

The 'Customer Letter: New' window is opened, empty if you clicked [New] or containing a duplicate of the highlighted Letter. In the case of the duplicate, the Date and Time of the new record will show the current date and time, not those of the original Customer Letter.

Customer Letter: New

Operations [New] [Duplicate] [Cancel] [Save]

No.: 108 Date: 14/9/2004 Time: 17:21:37

Customer Selection Cat/Class Selection Header Text Address

Customer: 001:009 Name: Against All Odds Trading Co

Contact: [] ☒ One per Contact

Category: []

Cust. Class: []

Contact Class: []

Job Desc.: []

Header: Introductory Letter

Greetings: []

Document: LETTER Reply To (Email): FrancoiseFrench@RadioImportExport.com

Sign: FF Signature: Francoise French

Language: [] Std. Text: STD

☐ OK

Text
Welcome to Radio Import/Export Ltd! We are committed to supplying only the very best in high fidelity sound equipment. We can supply in any quantity and are able to satisfy all bespoke needs. Please feel free to ring us to see if we can help with your requirements.

Since the amount of information stored about each Letter will not fit on a single screen, the Customer Letter window has been divided into five cards. At the top of each is the header. This contains the Letter Number and Date. There are five named buttons ('tabs') in the header.

Customer Letter: New

Operations [New] [Duplicate] [Cancel] [Save]

No.: 108 Date: 14/9/2004 Time: 17:21:37

Customer Selection Cat/Class Selection Header Text Address

By clicking the tabs you can navigate between cards.

Header

Customer Letter: New

Operations [New] [Duplicate] [Cancel] [Save]

No.: 108 Date: 14/9/2004 Time: 17:21:37

Customer Selection Cat/Class Selection Header Text Address

Customer: 001:009 Name: Against All Odds Trading Co

Contact: [] ☒ One per Contact

Category: []

Cust. Class: []

Contact Class: []

Job Desc.: []

Header: Introductory Letter

Greetings: []

Document: LETTER Reply To (Email): FrancoiseFrench@RadioImportExport.com

Sign: FF Signature: Francoise French

Language: [] Std. Text: STD

☐ OK

| | | |
|------|---------------|---|
| No. | Paste Special | Select from another Number Series |
| | | This Number is the unique identifier for this Customer Letter record. When creating a new record, Hansa will enter the next unused number from the first record in the Number Series - Customer Letters setting. You may change this number, but not to one that has already been used. If you are working in a multi-user environment, the Customer Letter Number is assigned when the record is saved for the first time. |
| Date | Paste Special | Current Date |
| | | The date as it is to appear on the letter. |
| Time | | This field records the time the record was originally created. It can be changed and can be made to appear on the printed letter if necessary. |

Customer Selection Card

| | | | | | |
|-----------|--------------------------------------|---------------------|--|------|---------|
| | Customer Selection | Cat/Class Selection | Header | Text | Address |
| Customer: | <input type="text" value="001:009"/> | | Name: <input type="text" value="Against All Odds Trading Co"/> | | |
| Contact: | <input type="text"/> | | <input checked="" type="checkbox"/> One per Contact | | |

This card is used in combination with the ‘Cat/Class Selection’ card to select the Customers and Contacts to whom the letter is to be sent.

| | | |
|----------|---------------|---|
| Customer | Paste Special | Customers and Suppliers in Customer register |
| | | Enter the Customer Number of the Customer to whom the letter is to be addressed. If the field is left blank, all Customers (except those marked as No Letters or No Mass Mailing on the ‘Terms’ card of their Customer records) will be mailed, subject to their satisfying any requirements entered to other fields. |
| | | It is possible to mail a range of Customers. To do this, enter the lowest and highest Customer Numbers of the range, separated by a colon. For example, to report on Customers 001 to 010, enter “001:010”. Note that an alpha sort is used, not a numeric one. Thus a range of 1:2 would also include 100, 10109, etc. |

By default, the 'Paste Special' list shows Customers.
Click the [Suppliers] button if you need to see Suppliers.

| No. | Short | Cat | Name | Department | VAT No. |
|------|-------|-----|-----------------------------|------------|-------------|
| 001 | | 1 | Against All Odds Trading Co | | 2 |
| 0010 | | | Gdansk Shipyard | | |
| 0011 | | | EU Zone | | |
| 002 | | 2 | New World Import/Export Co | | |
| 003 | | 2 | Schmidt GmbH | | D4948304PQ2 |
| 004 | | | Oslo Trading Co | | |
| 005 | | | Moscow Trading Co | | |
| 006 | | | Estonian Export | | |

Customer Name If a single Customer Number has been entered to the field above, the appropriate Customer Name is shown here.

If a range of Customer Numbers has been entered to the field above, the name of the first Customer in the range is shown.

Contact **Paste Special** Contact Person register, CRM module

If a single Customer Number has been specified, it is possible to mail a particular Contact at that firm by entering their name here. The 'Paste Special' function only lists Contact Persons for the Customer in question.

If no Contact is specified here and the One per Contact check box below is not checked, a single letter will be produced for each selected Customer, addressed to the main Contact entered on the 'Contact' card of each Customer record.

One per Contact Check this box if you would like to print a separate letter for each Contact for each selected Customer (i.e. those in the Contact Person register and those entered on the 'Contact' card of each Customer record). Letters will not be printed for Contact Persons whose No Letters or Closed boxes have been checked.

If this box is not checked and no Contact is specified in the field above, a single letter will be produced for each

selected Customer, addressed to the main Contact entered on the ‘Contact’ card of each Customer record.

If the check box is on, it will override any entries that have been made to the Contact Classification and Job Description fields on the ‘Cat/Class Selection’ card.

Cat/Class Selection Card

| | | | | | |
|--------------------|----------------------|---------------------|--------|------|---------|
| Customer Selection | | Cat/Class Selection | Header | Text | Address |
| Category: | <input type="text"/> | | | | |
| Cust. Class: | <input type="text"/> | | | | |
| Contact Class: | <input type="text"/> | | | | |
| Job Desc.: | <input type="text"/> | | | | |

This card is used in combination with the ‘Customer Selection’ card to select the Customers and Contacts to whom the letter is to be sent.

| | | |
|---------------|---------------|---|
| Category | Paste Special | Customer Categories setting, Sales Ledger |
| | | If you wish to mail all Customers of a particular Category (or range of Categories), specify that here. |
| | | This field assumes that the Customer field on the ‘Customer Selection’ card is blank: it will be ignored if the Customer field contains a value. |
| Cust. Class | Paste Special | Customer Classifications setting, CRM module |
| | | If you wish to mail all Customers of a particular Classification, specify that here. |
| | | If a range of Customers has been entered to the Customer field on the ‘Customer Selection’ card, all Customers in that range that are of the particular Classification will be mailed. |
| Contact Class | Paste Special | Customer Classifications setting, CRM module |
| | | If you wish to mail all Contacts of a particular Contact Classification, specify that here. |
| | | This field assumes that the Customer field on the ‘Customer Selection’ card contains a value and that the One per Contact box is not checked. It will have no effect if one or both these conditions are not met. |

Job Desc**Paste Special**

Job Descriptions setting, CRM module

If you wish to mail all Contacts of a particular Job Description, specify that here.

This field assumes that the Customer field on the 'Customer Selection' card contains a value and that the One per Contact box is not checked. It will have no effect if one or both these conditions are not met.

Header Card

| Customer Selection | Cat/Class Selection | Header | Text | Address |
|------------------------------------|---------------------|---|------|---------|
| Header: Introductory Letter | | | | |
| Greetings: | | | | |
| Document: LETTER | | Reply To (Email): FrancoiseFrench@RadiolImportExport.com | | |
| Sign: FF | | Signature: Francoise French | | |
| Language: | | Std.Text: STD | | |
| <input type="checkbox"/> OK | | | | |

This card is used in combination with the 'Text' card to determine the text of the letter. The Header, Greetings, Sign and Signature fields can all be printed separately on the letter, perhaps with different font styling, and will contain appropriate information. 'Paste Special' can be used from the Sign field to obtain a list of personnel.

Document**Paste Special**

Form register, System module

As is usual in Hansa, the printing of letters from a Customer Letter record is carried out either using the 'Documents' function or by clicking the Printer icon. However, the selection of the Form used (i.e. the letter template) is determined in a slightly different manner to that used by other documents in Hansa.

The most basic method of selecting the Form to be used is to do so using this field: simply enter the Form Code here.

However, it may be easier to use a single Form in most circumstances and to override that default only on special occasions. To do this, follow these steps—

1. Design a standard letter using the Form register in the System module. This process is fully described in the 'System Module' manual and, with an example specific to letter design, in the

'Printing Customer Letters' section below on page 109. Use the 'Properties' function on the Operations menu of the Form editor to assign the letter a suitable Form Code such as "LETTER". The Document Type should be "Customer Letters".

2. Change to the CRM module and open the 'Documents' list window using the 'Documents' item on the File menu or by clicking the [Documents] button in the Master Control panel.
3. Highlight 'Customer Letter' in the list and select 'Define Document' from the Operations menu. In the subsequent window, enter the Form Code ("LETTER", in our example) in the Form field on the first row. As is usual, you can use the 'Define Document' window to determine that a different Form is to be used according to the Language or Number Series of the Customer Letter or the Access Group of the user.
4. Once this has been done, the "LETTER" Form (or other Form from the 'Define Document' window chosen on the basis of Language, Number Series or Access Group) will be used if the Document field on the 'Header' card of the Customer Letter record is blank. If you wish to use a different Form for a particular Customer Letter, specify that using the Document field. The Form specified in this field will be used instead of that specified in the 'Define Document' window.

Reply To (Email) If the Customer Letter is to be sent by email using the 'Send Email' Operations menu function, specify here the return address (sender's address) that is to be used. If this field is empty, the return address will be taken from the Person record quoted in the Sign field or, if that is blank, from the E-Mail SMTP Server setting.

Language

Paste Special

Languages setting, System module

When letters from a Customer Letter record are printed, the selection of the Form used (i.e. the letter template) is determined using one of two methods. You can enter a Form in the Document field above or, if the Document

field is empty, you can use the 'Define Document' window for the Customer Letter document. The second method allows letters to be printed using different Forms depending on the Language of the Customer Letter. Specify that Language here.

If you are using the second method (i.e. if the Document field above is empty), you can override the Language specified here when you print letters from the 'Documents' list window. This can be useful if, for example, you have a standard letter that is sometimes printed and sometimes faxed. In this case, enter separate rows in the 'Define Document' window for printing and faxing. The fax row should have a dedicated Language (e.g. "FAX") in the Lang field. When you create the Customer Letter, enter the appropriate Language on the 'Header' card to use the default printer (usually the Language can be left blank in both the Customer Letter and the 'Define Document' window). When you need to fax the letter, open the 'Specify Customer Letter' window from the 'Documents' list in the normal way, and enter the Language for the fax server. This will override the Language in the Customer Letter record.

Std. Text**Paste Special**

Standard Text register, CRM module

If appropriate, use this field to select a Standard Text record. The text itself will appear in the field on the 'Text' card.

OK

The OK check box should be switched on once the Customer Letter record has been checked and approved. Until it has been switched on, any letters printed from the record will be marked as a "Test Printout". Once it has been switched on, you will no longer be able to modify the record, although if modifications subsequently become necessary the OK check box can be switched off again.

Two reasons for checking and approving a Customer Letter prior to approving it and preventing further modification are to ensure the list of recipients is correct and to check the letter text contains no errors. These tasks can both be accomplished quickly and easily using the 'Letter List' function on the Operations menu.

References in this manual to approved Customer Letters are to Customer Letters whose OK box has been checked.

Text Card

| | Customer Selection | Cat/Class Selection | Header | Text | Address |
|------|--|---------------------|--------|------|---------|
| Text | <p>Welcome to Radio Import/Export Ltd! We are committed to supplying only the very best in high fidelity sound equipment. We can supply in any quantity and are able to satisfy all bespoke needs. Please feel free to ring us to see if we can help with your requirements.</p> | | | | |

This shows the text of the letter. This can be brought in from the Standard Text register (in which case it can be modified here for this mailing only) or it can be written here as a one-off letter.

Address Card

| Customer Selection | Cat/Class Selection | Header | Text | Address |
|--------------------|---------------------|--------|------|---------|
| Address: | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| Fax: | | | | |
| Email: | | | | |

If a single Customer has been specified on the 'Customer Selection' card, its main address and fax will appear here. If the Contact Person has a different Address and Fax, these will be shown instead of those from the Customer. A

default Email address will also be brought in from the Customer or Contact Person record.

These fields are only used if a single Customer has been specified and the One per Contact box is not checked. In this case, the address entered here will be printed on the letter. If the letter is to be sent by fax or email, the fax number or email address entered here will be used. If you need to change the address for a particular letter, you can do so here: such a change will not be fed back to the Customer or Contact Person.

When designing the Form to be used when printing the letter, several fields are available to print the address. The Address 1, Address 2, etc. fields contain each line of the address entered here. The Address field contains the whole of this address. The Contact Address field contains the address from the Contact Person record or, if that is empty, from the Customer record.

If more than one Customer has been specified in the Customer Letter, the address, fax number or email address will be taken from each Customer record in turn. If the One per Contact box is checked, they will be taken from each Contact Person record or, if blank, from the related Customer.

Inspecting and Approving Customer Letters

Before printing the letters as determined by a Customer Letter record, it is worth checking that the letter text contains no errors and that everyone that should receive a letter will do so, especially if the Customer Letter record represents a large mailshot. To do this, use the 'Letter List' function on the Operations menu. This produces a report showing the full letter text and a list of recipients.

When everything is satisfactory, approve the Customer Letter record by checking the OK box and saving. Once this has been done, you will no longer be able to change any details in the record. If it subsequently becomes necessary to make a change, remove the check from the OK box and save by clicking the [Save] button in the Button Bar.

Printing Customer Letters

Two methods are available by which the letters determined by a Customer Letter record can be printed. In both cases, if the Customer Letter record has not been approved, all printed letters will be marked “Test Printout”. The two methods are—

1. With a Customer Letter record on screen, click the Printer icon.
2. Use the ‘Documents’ function (accessible using the function on the File menu or the button in the Master Control panel). Double-click ‘Customer Letters’ in the resulting list. This method allows you to print letters from a range of Customer Letter records.

In both cases, the letters are printed using a layout or template designed using the Form register in the System module. This layout or template should be designed to ensure the letters will be printed in your house style and that they fit on your headed stationery.

The design should take into account what is to happen when the printing of a letter requires more than one page. Usually, in such cases the address, date and greeting are printed on the first page only. This means the letter text might start higher up on the second and subsequent pages compared to the first page.

To design the letter template follow these steps—

1. Switch to the System module and select ‘Forms’ from the Registers menu or click the [Forms] button in the Master Control panel.
2. The ‘Forms: Browse’ window is opened, listing Forms already entered. To enter a new standard letter template, click the [New] button in the Button Bar; to modify an existing template, double-click it in the list.
3. In the case of a new Form, select ‘Properties’ from the Operations menu.

Form Properties

Code: LETTER ☒ Printer dialog

Comment: Multi Page Letter

Document Type: Customer Letters

Matrix Rows On

| | |
|-----------------|------------------|
| Single Page: 34 | Middle Pages: 52 |
| First Page: 34 | Last Page: 52 |

OK Cancel

Enter an appropriate Code and, using 'Paste Special' from the Document Type field, classify the Form as a Customer Letter. This will ensure that you will only be able to include in the template those fields appropriate to letters.

You should now calculate how many lines of letter text can be printed on each page of a multi-page letter. In the example we will use throughout this description, the first page has room for 34 lines of text, while the second and subsequent pages have room for 52. Type these figures in to the four fields under the heading of Matrix Rows On, as shown in the illustration.

These four fields are used as follows—

| | |
|---------------|---|
| First | The first page of a multi-page document. |
| Middle | In a multi-page document, the pages between the first and last pages. |
| Last | The last page of a multi-page document. |
| Single | The sole page of a single-page document. |

Usually, the First and Single page designs will be the same.

So, in this example, letters will be printed as follows, depending on the length of the letter text (i.e. on the number of lines)—

| Lines of Text | Pages | Type of Page |
|----------------------|--------------|-------------------------|
| Up to 34 | 1 | Single |
| 35-87 | 2 | First and Last |
| 88-139 | 3 | First, Middle and Last |
| 140-191 | 4 | First, 2 x Middle, Last |

When all fields are complete, click the [OK] button in the dialogue box to close it.

- Usually, the First and Single page designs will be the same (a single page letter will have the same appearance as the first page of a multi-page letter). In this step, these pages (the First and Single pages) will be designed. Add fields and text objects as described below, so that the design ends up looking something like this—

The 'Form LETTER: Inspect' window displays a form design. At the top, there are buttons for 'Operations', 'New', 'Duplicate', 'Cancel', and 'Save'. Below these are buttons for 'Text', 'Line', 'Frame', 'Field', and 'Picture'. The form itself contains several fields: a large box for 'Contact Address', a 'Date' field with the value 'transdate', a 'Dear' field with the value 'Greetings', a 'Header' field, and a 'Text' field.

To add a field to the design, click the [Field] button at the top of the window and then draw a box on the Form where the field is to appear. It can be moved or resized later if necessary. The 'Field' window opens—

The 'Field' dialog box is used to configure a field. It includes the following fields and options:

- Fieldname:** Text
- Field Argument:** 90
- Left:** 62
- Top:** 303
- Right:** 64
- Bottom:** 749
- Style:** FIELD_T
- Vertical Spacing:** 12
- Escape Sequence:**
- Format:** 0
- Justification:**
 - ☒ Left
 - ☐ Right
 - ☐ Centre
- Clipping:**
 - ☒ Off
 - ☐ On
- Word Wrap:**
 - ☒ Off
 - ☐ On, flow down
 - ☐ On, flow up
- Exclude from page:**
 - ☐ First
 - ☒ Middle
 - ☒ Last
 - ☐ Single

Buttons for 'OK' and 'Cancel' are at the bottom right.

Enter the Field Name (use 'Paste Special' to see all available Field Names for the "Customer Letter" Document Type), and paste a type style in the Style field.

The Exclude From Page options are used to set the page specification for each field. Check the Middle and Last of these options, to signify that each field will be printed on the First and Single pages (i.e. they will be excluded from the Middle and Last pages).

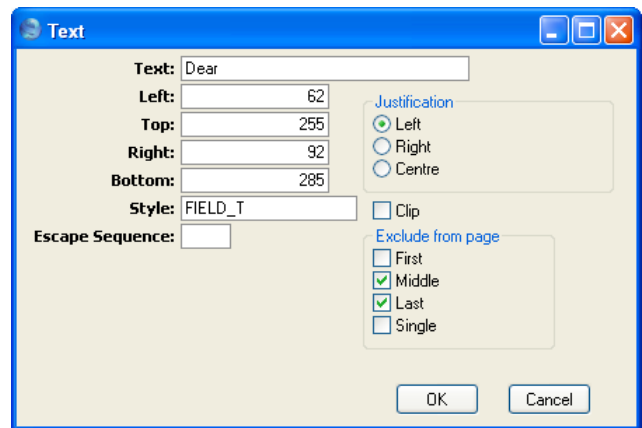
In the case of the field representing the letter text itself, enter “Text” as the Field Name, and complete the other details as follows—

| | |
|-----------------------|---|
| Spacing | Since the letter text is likely to extend over more than one line, it is necessary to make an entry to the Spacing field. If this is left at 0 (the default), all the lines of the letter will be superimposed on one another. In the case of 10 point Times, a Spacing of at least 10 points is recommended. |
| Top, Bottom | Don’t forget to ensure that the Text field is deep enough to accommodate the required number of lines of text in the specified font (34 lines in the example). |
| Field Argument | Enter here the maximum number of characters that can be printed in one line. In the example illustration, it has been specified that up to 90 characters can be printed per line (fewer if the 90th character occurs in the middle of a word). |

Click the [OK] button in the dialogue box to save the field specifications, and repeat as necessary until all fields for the First and Single pages have been added.

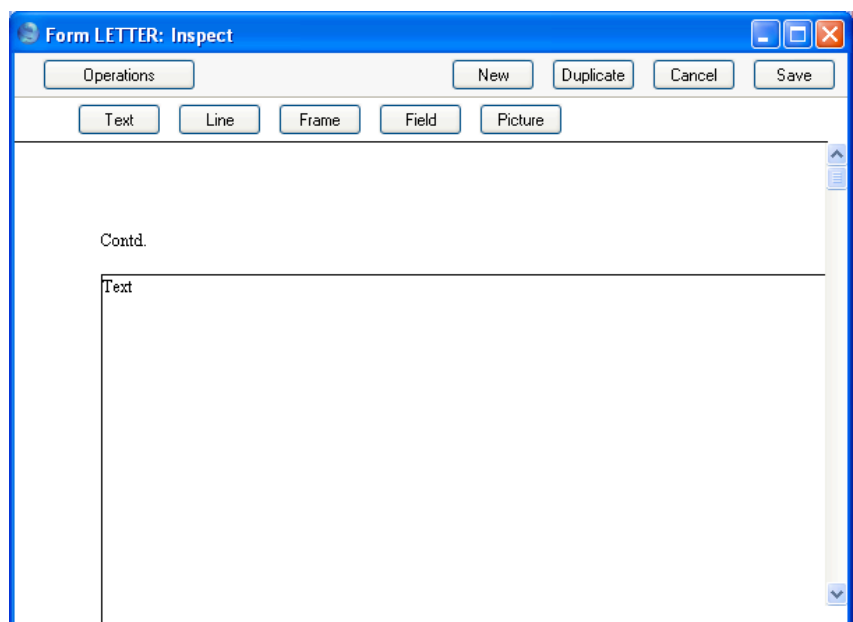
Text objects can be added to the design in a similar manner, by clicking the [Text] button at the top of the window and then drawing a box on the Form where the object is to appear. When the ‘Text’ window opens, type the text that is to be printed on the Form in the Text field. This can be up to 80 characters long, but it is limited to one line. To create a text area with more than one line, use the appropriate number of separate one-line text objects.

As with fields, all the text objects that are to appear on the First and Single pages should have the same page specification set using the Exclude From Page options, as shown below.



Click the [OK] button in the dialogue box to save the text object specifications, and repeat as necessary until all text objects for the First and Single pages have been added.

5. Now design the Middle and Last pages. In our example, they will be the same. To help with this, you can hide the objects added in step 4 above. To do this, select 'Middle Only' from the Operations menu. This displays only those objects that are to be printed on the Middle page. At this stage, there are no such objects, so the window goes blank. Add fields and text objects, so that the design looks something like this—



This time, use the Exclude From Page options to specify that each object will be printed on the Middle and Last pages (i.e. they will be excluded from the First and Single pages). In the case of the Text field, don't forget to ensure that it is deep enough to accommodate the required number of lines of text in the specified font (52 lines in the example)—

6. Now, choose 'View All' from the Operations menu. All objects from all pages are displayed. This confirms that the left-hand margins of all objects are correctly aligned—

Note how the Text field from the Middle and Last pages starts higher up the page than the Text field from the First and Single pages.

7. If any object is not aligned correctly, dragged it into position using the mouse, or double-click it to open its specification window and type in the correct co-ordinates.
8. When the design is complete, click the [Save] button in the Button Bar to save the Form.
9. Now you should inform Hansa that the template you have just designed is to be used when printing letters. For details about how to do this, please refer to the section above on page 100 describing the 'Header' card of the Customer Letter record.

Faxing Customer Letters

If you want to fax a letter instead of printing it and are using a Macintosh with a fax modem, follow these steps—

1. Having entered the Customer Letter as usual, select 'Documents' from the File menu.
2. Highlight 'Customer Letters' in the list.
3. Select 'Fax' from the Operations menu.
4. Double-click 'Customer Letters' in the list and proceed in the usual way.

If you have a fax server, you can configure a more permanent arrangement whereby certain Customer Letters are always faxed. Follow these steps—

- i. Following the instructions in the 'System Module' manual, enter a row representing your fax server in the Printers setting in the System module.
- ii. In the CRM module, select 'Documents' from the File menu. Highlight 'Customer Letters' in the list and select 'Define Document' from the Operations menu. Enter a row with the appropriate Form and quoting your fax server in the Printer field. This row should have a dedicated Language (e.g. "FAX") in the Lang field or a dedicated Number Series in the Ser. No. field.
- iii. When you enter a Customer Letter that is to be faxed, ensure it has the correct Language on the 'Header' card or that you assign it a Number that is in the correct Number Series. A form must be specified in the Document field, also on the 'Header' card.

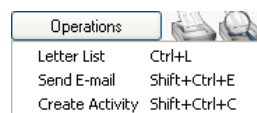
- iv If you have a standard letter that is sometimes printed and sometimes faxed, enter separate rows in the 'Define Document' window for printing and faxing, as described in step ii above. When you create the Customer Letter, enter the appropriate Language on the 'Header' card to use the default printer (usually the Language can be left blank in both the Customer Letter and the 'Define Document' window). When you need to fax the letter, open the 'Specify Customer Letter' window from the 'Documents' list in the normal way, and enter the Language for the fax server. This will override the Language in the Customer Letter record.

Note that any pictures included in the letter Form (i.e. PICT and EPS files) will not be faxed.

The fax number will be chosen in the same way as the address for printed letters: please refer to the section above on page 107 describing the 'Address' card of the Customer Letter record for details.

Operations Menu

When a Customer Letter is open in a record window, the Operations menu is available.



Letter List

Select this command to produce an instant report showing the letter text and a list of recipients. Ensure you save the Customer Letter record by clicking the [Save] button in the Button Bar before using this function.

Send Email

This function will send the letter text to all recipients by email. The email addresses will be taken from the Contact Person or Customer registers as necessary. Each email address will be checked to see if it is valid (i.e. contains the @ character) before an email is sent to it. The return address (sender's address) will be taken from the Reply To (Email) field on the 'Header' card of the Customer Letter record, from the sender's Person record or from the E-Mail SMTP Server setting.

To use this function, the Customer Letter must be approved and saved, the External Gateway module must be in use, and the E-Mail SMTP Server setting must be configured. Please refer to the 'Mail' manual for full details.

Create Activity

This function can be used to create Activities. This can be useful if it is necessary, for example, to schedule a print run. The Activity Type given to Activities created by this function will be taken from the Activity Types, Subsystems setting. The Task Type of the new Activities will be To Do, the Symbol will be Other and the Start Date will be the current date.

When the function is selected, the following screen appears, by which a new Activity record can be created—

The screenshot shows the 'Activity: Inspect' window. At the top, there is a title bar with the text 'Activity: Inspect' and standard window controls. Below the title bar is a toolbar with buttons for 'Operations', 'New', 'Duplicate', 'Cancel', and 'Save'. The main area contains several fields and sections:

- Text:** A text box containing 'Introductory Letter'.
- Type:** A dropdown menu showing 'ML'.
- Start Time:** A text box.
- End Time:** A text box.
- Cost (Time):** A text box.
- Start Date:** A date picker showing '4/10/2004'.
- End Date:** A date picker.
- Task Type:** A section with radio buttons for 'Calendar', 'To Do' (selected), and 'Timed To Do'.
- Calendar:** A section with radio buttons for 'Time', 'Profile', and 'Don't Show' (selected).
- Symbol:** A section with radio buttons for 'Call', 'Meeting', 'Deskwork', and 'Other' (selected).
- Customer:** A text box showing '001:009'.
- Name:** A text box showing 'Against All Odds Trading Co'.
- Contact:** A text box.
- Phone:** A text box.
- Result:** A text box.

A new record is opened in a window entitled 'Activity: Inspect'. This means that it has already been saved, and is being opened for checking. Any text in the Header field of the Customer Letter will be copied to the Text field of the Activity, while the initials in the Sign field of the Customer Letter will be copied to the Persons field of the Activity. After amendment if necessary, save the record in the Activity register by clicking the [Save] button in the Button Bar and close it using the close box. Alternatively, if you no longer require the Activity, remove it using the 'Delete' function on the Record menu. In either case, you will be returned to the Customer Letter window.

The Customer Letter and the Activity will remain connected to each other through the Attachments facility. This allows you to open the Customer Letter quickly and easily when reviewing the Activity, or to open the Activity from the Customer Letter. When viewing the Activity or Customer Letter, click the button with the paper clip image to open a list of attachments. Then double-click an item in this list to open it.

The Customer Letter does not have to be saved before creating an Activity.

You can choose to have an Activity created automatically when each Customer Letter is approved. Again, this is controlled using the Activity Types, Subsystems setting. An Activity will not be created using this method if a range of Customers has been entered in the Customer field in the Customer Letter record.

Please refer to the sections earlier in this manual for full details of the 'Activity: Inspect' window (page 55) and the Activity Types, Subsystems setting (page 40).

The Customer Register

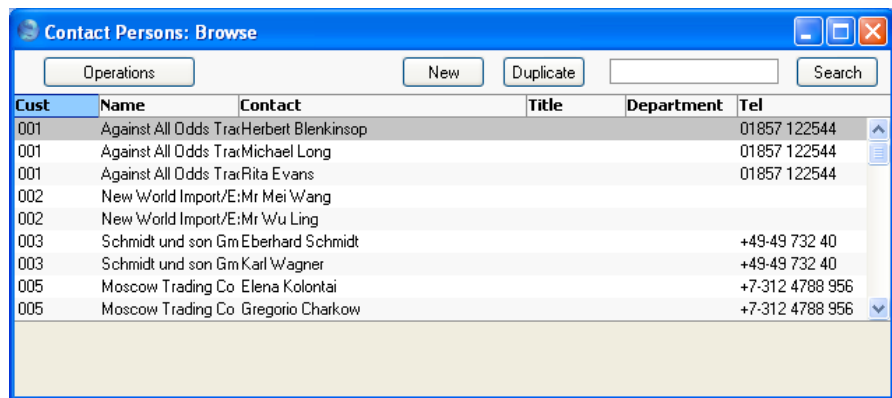
Hansa's normal Customer register: please refer to the 'Customers and Suppliers' manual for a full description. Note the use of the Classification field on the 'Contact' card of the Customer record: this is related to the Customer Classifications setting described on page 41 above. Each Customer may have more than one Classification, separated by commas.

The Contact Person Register

When you enter a record in the Customer register, you can record the name of the main contact person in the Primary Contact field on the 'Contact' card. This name will be brought in as a default whenever the Customer is used in a Quotation, Order or Invoice.

If you need to enter further Contact Persons for a particular Customer, you can do so using this register, which is also available as a setting in the Sales Ledger. Then, selecting 'Paste Special' when in the Attn. field of a Quotation, Order or Invoice will list all Contacts for the specified Customer, including the main contact.

To enter a new Contact Person, ensure you are in the CRM module and click the [Contact Persons] button in the Master Control panel or select 'Contact Persons' from the Registers menu. The 'Contact Persons: Browse' window appears, listing Contacts already entered.



| Cust | Name | Contact | Title | Department | Tel |
|------|-----------------------|--------------------|-------|------------|-----------------|
| 001 | Against All Odds Trax | Herbert Blenkinsop | | | 01857 122544 |
| 001 | Against All Odds Trax | Michael Long | | | 01857 122544 |
| 001 | Against All Odds Trax | Rita Evans | | | 01857 122544 |
| 002 | New World Import/E: | Mr Mei Wang | | | |
| 002 | New World Import/E: | Mr Wu Ling | | | |
| 003 | Schmidt und son Gm | Eberhard Schmidt | | | +49-49 732 40 |
| 003 | Schmidt und son Gm | Karl Wagner | | | +49-49 732 40 |
| 005 | Moscow Trading Co | Elena Kolontai | | | +7-312 4788 956 |
| 005 | Moscow Trading Co | Gregorio Charkow | | | +7-312 4788 956 |

Double-click on a row to open and change a Contact Person record, or click [New] in the Button Bar to create a new one. You can also create a new Contact Person by opening a Customer record and selecting 'New Contact' from the Operations menu.

Since the amount of information stored about each Contact will not fit on a single screen, the Contact window has been divided into two cards. At the top of each is the header. This contains the Customer Number and Name and the Contact Name. There are two named buttons ('tabs') in the header.

By clicking the tabs you can navigate between the cards, and always go directly to a certain card. The header is always visible, so you can always identify the Contact you are working with.

Header

| | | |
|-----------------|----------------------|---|
| Cust No. | Paste Special | Customers and Suppliers in Customer register |
|-----------------|----------------------|---|

Enter the Customer Number or use the 'Paste Special' function. When you press Return, the Customer's name, address and other information will be entered into the appropriate fields.

By default, the 'Paste Special' list shows Customers.
Click the [Suppliers] button if you need to see Suppliers.

| No. | Short | Cat | Name | Department | VAT No. |
|------|-------|-----|-----------------------------|------------|-------------|
| 001 | | 1 | Against All Odds Trading Co | | 2 |
| 0010 | | | Gdansk Shipyard | | |
| 0011 | | | EU Zone | | |
| 002 | | 2 | New World Import/Export Co | | |
| 003 | | 2 | Schmidt GmbH | | D4948304PQ2 |
| 004 | | | Oslo Trading Co | | |
| 005 | | | Moscow Trading Co | | |
| 006 | | | Estonian Export | | |

Cust. Name The Customer Name is entered after you have entered the Customer Number.

If you would like this field to be updated automatically whenever the Customer Name is changed in the Customer register, check the Update Customer's Name on Contact Persons box in the Activity Type, Subsystems setting.

Department The Department in which the Contact Person works.

Name The name of the Contact Person.

Closed Check this box if the Contact is no longer to be used. Closed Contacts will appear in the 'Contact Persons: Browse' window but not in the Contact Persons 'Paste Special' list. A closed Contact can be re-opened at any time. Letters will not be printed for Closed Contacts from the Customer Letter register.

No Mass Letters If this box is checked, printed letters will be sent to the Contact Person when specifically addressed to them, but the Contact Person will not be included in mass mailing campaigns. A mass mailing campaign is one generated from a Customer Letter whose One Per Contact box is checked. No Contact Persons belonging to a Customer marked No Mass Letters will be included in mass mailing campaigns.

You can switch this option on or off for several Customers at once using the 'Mass Mailing' Maintenance function, described below on page 139.

No Mass Emailing If this box is checked, single emails will be sent to the Contact Person when specifically addressed to them, but the Contact Person will not be included in mass emailing campaigns. A mass emailing campaign is one generated from a Customer Letter whose One Per Contact box is checked. No Contact Persons belonging to a Customer marked No Mass Mailing will be included in mass emailing campaigns.

You can switch this option on or off for several Customers at once using the 'Mass Mailing' Maintenance function, described below on page 139.

Address Card

Address Hansa will enter the address from the Customer record. Change to a personal or department address if necessary.

Tel, Fax Entered by Hansa from the Customer record. Change as necessary.

The 'Update Fax Numbers' Maintenance function in the System module can be used to remove spaces and dashes from all Contact Persons' Fax Numbers. This will be necessary if you will be sending faxes through the fax server, in which case fax numbers should not contain non-numeric characters.

Mobile The Contact's mobile number.

Email The email address of the Contact Person. This will be brought to any Customer Letters addressed to this Contact, allowing communication by email in future versions of Hansa.

Alt Phone Any other contact number such as home telephone or personal fax number can be recorded here.

Date of Birth The Contact's date of birth. The Birthday List report can be used to list Contacts with a particular birthday.

Comment Card

Contact Person: Inspect

Operations New Duplicate Cancel Save

Cust. No.: 005 Cust. Name: Moscow Trading Co

Name: Gregorio Charkow

Department:

☐ Closed ☐ No Mass Letters ☐ No Mass Emailing

Address Comment

Comment: Mr Charkow is one of two partners in the company.
Has excellent relations with the Ministry of Works in Moscow

Specific Job Title:

Job Description: Account Executive

Classification:

Salutation 1: Gregorio

Salutation 2: Mr Charkow

Salutation 3:

Comment Any comment.

Specific Job Title The Job Title of the Contact, as it appears on their business card. This can be included when addressing letters to Contacts.

Job Description **Paste Special** Job Descriptions setting, CRM module

Use this field to describe the role of the Contact within their company. It allows you to side step any slight differences in Job Title terminology that may exist in different companies. For example, the generic role of Finance Director might have “Director (Finance)” as its Job Title in one company but “Director of Finance” in another. Enter the generic title (“Finance Director”) in the Job Description field of such Contacts, to enable you to mail all Finance Directors together, irrespective of differences in inter-company terminology.

| Classification | Paste Special | Customer Classifications setting, CRM module |
|----------------|---|--|
| | <p>This field can be used to mark each Contact with comments relevant to their role in the sales process, such as “Decision Maker” or “User”.</p> <p>As with the Classification field on the ‘Contact’ card of the Customer screen, more than one entry can be made to this field, separated by commas.</p> | |

Salutation 1, 2 and 3

These fields can be used to record greetings with various degrees of formality. It is recommended that you enter Salutations in all three fields, even if they are the same.

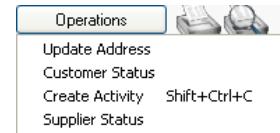
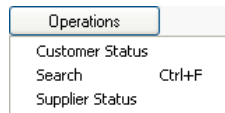
When you design the Forms that will be used to print Customer Letters, you can include the Salutation 1, 2 or 3 field depending on the formality of the letter. You can also use these fields when designing Invoices.

Printing Contact Person Details

When a Contact Person record is open, click the Printer icon to print a Contact List report for that Person. This shows contact details (telephone, fax and mobile numbers and email address).

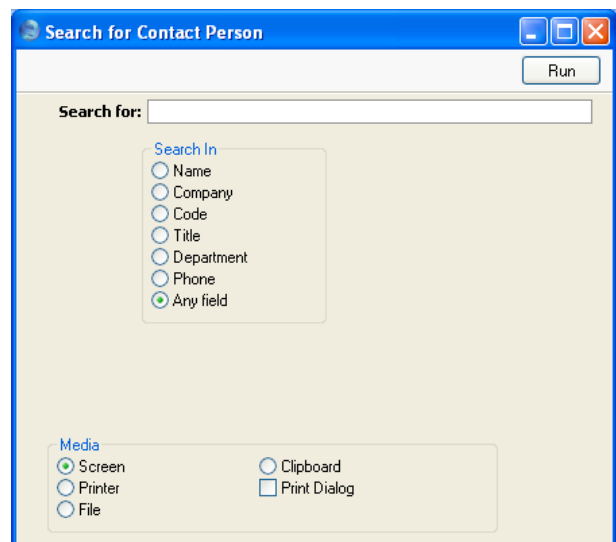
Operations Menu

The Operations menus for Contact Persons are shown below. On the left is that for the 'Contact Persons: Browse' window: highlight a Contact Person in the list before selecting the function. You can also apply the function to a group of Contact Persons: highlight the first Contact Person in the group and then click on the last while holding down the Shift key. Then select the function. On the right is that for the 'Contact Person: New' and 'Contact Person: Inspect' windows.



Search

You can search for Contact Persons containing a certain word or phrase. To do this, open the 'Contact Persons: Browse' window and select 'Search' from the Operations menu. The following window opens—



Search for

Enter here the word or phrase that you are looking for.

Search in

Choose the field where you want to search for the word or phrase.

Press [Run] to activate the search. A report will be printed to screen, listing the Contact Persons found. In the report, click on the Name of a Contact Person to open the record.

Customer Status

The 'Customer Status' function provides a short cut to the Customer Status report, otherwise only available in a less detailed form in the Sales Ledger.

In its basic form, this report shows address and turnover information and lists all Contact Persons for the Customer to whom the Contact Person currently on screen belongs. However, if required, more information can be shown in the report, such as lists of recent Activities, Invoices, Contract Quotations, Contracts, Quotations and Orders, and monthly sales figures for the past year. Use the Customer Status Report setting in the CRM module to control how much of this additional information will be shown to different users, each of whom can be given a different report definition. Much of this additional information will not be shown if the report is produced from the 'Reports' function in the Sales Ledger.

The Customer Status report has Hansa's Drill-down feature. Many records such as Contact Persons, Quotations and Invoices can be opened by clicking in the appropriate places in the report. The report also contains a [New Activity] text button that you can click to create an empty new Activity.

The function will have no effect if you try to use it with a Contact belonging to a company that is not marked as a Customer.

Update Address

Select this function to update the Contact Person with the latest Address and Telephone and Fax Number from the Customer record.

Create Activity

This function can be used to create records in the Activity register in the System module. This can be useful if it is necessary, for example, to schedule a call to a new Contact Person.

When you select the function, the following screen appears, where you can create a new Activity—

The screenshot shows a window titled "Activity: Inspect" with a blue header bar. Below the header is a toolbar with buttons: "Operations" (with printer and scanner icons), "New", "Duplicate", "Cancel", and "Save". The main form area has a "Text:" label and a text input field, and a "Type:" label with a dropdown menu. To the right of the "Type:" dropdown is a "Done" checkbox. Below these is a tabbed interface with tabs: "Time", "Task Type", "Symbol", "Customer", "Project", "Service", "Text", "Persons", and "User values". The "Time" tab is active, showing fields for "Start Time:", "End Time:", "Cost (Time):", "Start Date:" (with value "4/10/2004"), and "End Date:". Below the "Time" tab are two groups of radio buttons. The "Task Type" group has options: "Calendar", "To Do" (selected), and "Timed To Do". The "Calendar" group has options: "Time", "Profile", and "Don't Show" (selected). Below these is a "Symbol" group with radio buttons: "Call", "Meeting", "Deskwork", and "Other" (selected). At the bottom of the form is a "Customer" card with fields for "Customer:" (value "005"), "Name:" (value "Moscow Trading Co"), "Contact:" (value "Gregorio Charkow"), "Phone:" (value "+7-312 4788 956"), and "Result:" (empty).

The new record is opened in a window entitled 'Activity: Inspect'. This means that it has already been saved and is being opened for checking. The Customer Number, Name and Phone Number are brought in automatically to the fields on the 'Customer' card. No default Activity Type will be offered, while the Task Type will be To Do, and the Symbol will be Other. The Start Date of the Activity will be the current date, and the Person will be the current user.

After amendment if necessary, save the record in the Activity register by clicking the [Save] button in the Button Bar and close it using the close box. Alternatively, if you no longer require the Activity, remove it using the

'Delete' function on the Record menu. In either case, you will be returned to the Contact Person window.

The Contact Person and the Activity will be connected to each other through the Attachments facility. This allows you to open the Contact Person quickly and easily when reviewing the Activity, or to open the Activity from the Contact Person. When viewing the Activity or Contact Person, click the button with the paper clip image to open a list of attachments. Then double-click an item in this list to open it.

The Contact Person does not have to be saved before creating an Activity, although if the Contact Person is not saved, some details may not be fed through to the Activity.

Please refer to page 55 above for full details of the 'Activity: Inspect' window.

Supplier Status

In its basic form, the 'Supplier Status' function provides an immediate report listing previous Invoices and Payments for the Supplier to whom the Contact Person currently on screen belongs (or for those Suppliers to whom the Contact Persons highlighted in the browse window belong). It also shows total turnover and amount due figures. The function will have no effect if you try to use it with a Contact belonging to a company that is not marked as a Supplier.

However, if required, additional information can also be shown in the report, such as lists of recent Activities, Goods Receipts and Purchase Orders and monthly purchasing figures for the past year. Use the Supplier Status Report setting in the CRM module (described above on page 48) to control how much of this additional information will be shown to different users, each of whom can be given a different report definition.

The Standard Text Register

This register can be used to build up a library of standard letters to be used at particular stages in the development of the relationship with a Customer. These standard letters can be referred to from the Customer Letter register.

To enter a new Standard Text record, ensure you are in the CRM module and click the [Standard Texts] button in the Master Control panel or select 'Standard Texts' from the Registers menu. The 'Standard Texts: Browse' window opens, listing the available Standard Text records; to enter a new item, click the [New] button in the Button Bar. For each new Standard Text record, enter a Code and a descriptive Comment together with the letter text itself.

Standard Text: Inspect

Navigation: ◀ ▶

Buttons: New Duplicate Cancel Save

Code: STD

Comment: Introductory Sales Letter

Welcome to Radio Import/Export Ltd! We are committed to supplying only the very best in high fidelity sound equipment. We can supply in any quantity and are able to satisfy all bespoke needs. Please feel free to ring us to see if we can help with your requirements.

To save a Standard Text record, click the close box and elect to save changes.

The Standard Period Register

You can use this register together with the 'Apply Standard Period' Maintenance function to duplicate a Person's Calendar Activities from a particular period. For example, if you use the same Profile Activities every week, you can copy them to the next week or the next few weeks. You can also copy them for other members of your department.

Use the Standard Period register to specify the Activities that are to be duplicated. You can do this once, and then duplicate a set of Activities many times. Then, use the 'Apply Standard Period' Maintenance function to create the duplicate Activities. The original Activities will remain untouched.

Follow these steps—

1. Open the Standard Period register by clicking the [Standard Periods] button in the Master Control panel or by selecting 'Standard Periods' from the Registers menu. The 'Standard Periods: Browse' window is displayed, showing all Standard Period records previously entered. Double-click a record in the list to edit it, or add a new record by clicking the [New] button in the Button Bar. When the record is complete, save it by clicking the [Save] button in the Button Bar or by clicking the close box and choosing to save changes. To close it without saving changes, click the close box.

Code Enter a unique Code by which the Standard Period record will be identified.

Person **Paste Special** Person register, System module
Specify the Person whose Activities are to be duplicated. Activities with this Person in the Cc field will not be duplicated.

Start Date, End Date

Paste Special Current Date

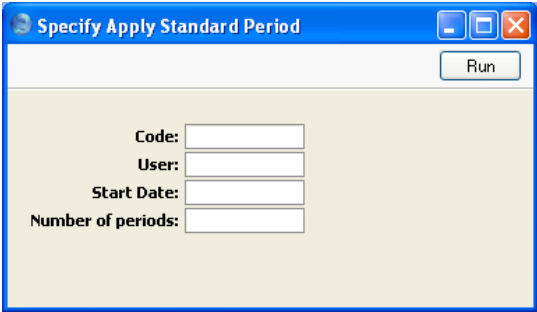
Use these fields to specify the period whose Activities are to be duplicated.

Comment Enter a name for the Standard Period record, to be shown in the ‘Standard Periods: Browse’ window and the ‘Paste Special’ list.

Each Standard Period record will cause all Calendar and Timed To Do Activities with the appropriate Person and Start Date to be duplicated. To Do, Private and invalidated Activities will not be duplicated. Done Activities will be duplicated, but the new Activities will not be marked as Done.

- 2. Once you have specified the Activities that are to be duplicated, use the ‘Apply Standard Period’ Maintenance function to carry out the duplication.

To use this function, first open the ‘Maintenance’ list by selecting ‘Maintenance’ from the File menu. Double-click ‘Apply Standard Period’ in the list. The following dialogue box appears —



Code **Paste Special** Standard Period register, CRM module

Enter the Code of a record in the Standard Period register. This will specify the Person whose Activities will be duplicated, and from what period.

User **Paste Special** Person register, System module

Specify here the Person for whom the new Activities are to be created. This can be the same Person as that in the original Activities, or a different one.

Start Date**Paste Special****Current Date**

Specify here the date that is to be used in the first new Activity.

Number of periods

Specify here how many sets of new Activities are to be created. For example, if the period in the Standard Period record is one week and you enter 3 here, the original Activities will be duplicated three times for the next three weeks.

Click the [Run] button in the Button Bar to run the function. When it has finished, you will be returned to the 'Maintenance' list window.

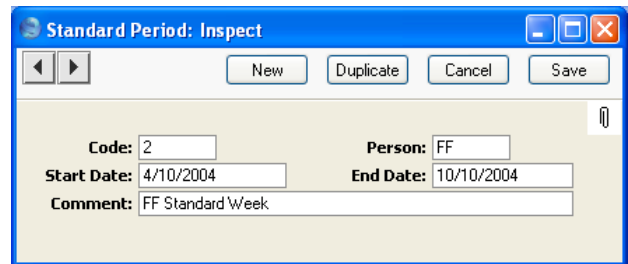
Example

The Calendar illustrated below shows a week's Profile Activities for Person FF—

| Week | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday | Sunday |
|------|--------|---------|-----------|----------|--------|----------|--------|
| 40 | Sep 27 | Sep 28 | Sep 29 | Sep 30 | 1 | 2 | 3 |
| 41 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 42 | 11 | 12 | 13 | 14 | 15 | 16 | 17 |
| 43 | 18 | 19 | 20 | 21 | 22 | 23 | 24 |
| 44 | 25 | 26 | 27 | 28 | 29 | 30 | 31 |
| 45 | Nov 1 | Nov 2 | Nov 3 | Nov 4 | Nov 5 | Nov 6 | Nov 7 |

Persons: FF

These Activities are to be copied to the next three weeks. First, we enter a record to the Standard Period register for the period 4/10/2004-10/10/2004 for Person FF—



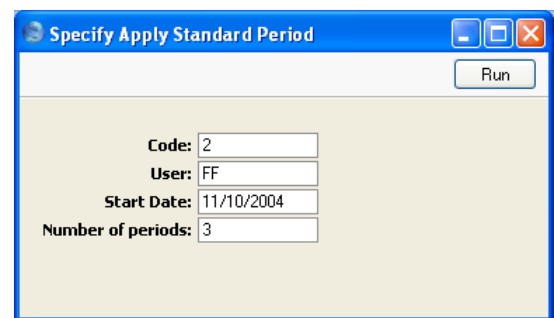
The 'Standard Period: Inspect' dialog box contains the following fields and values:

| | | | |
|--------------------|------------------|------------------|------------|
| Code: | 2 | Person: | FF |
| Start Date: | 4/10/2004 | End Date: | 10/10/2004 |
| Comment: | FF Standard Week | | |

Buttons: New, Duplicate, Cancel, Save

The period runs for one calendar week from Monday to Sunday. This is necessary to avoid new Activities being created for weekends.

Next, we use the 'Apply Standard Period' Maintenance function to copy these Activities to the next three weeks—



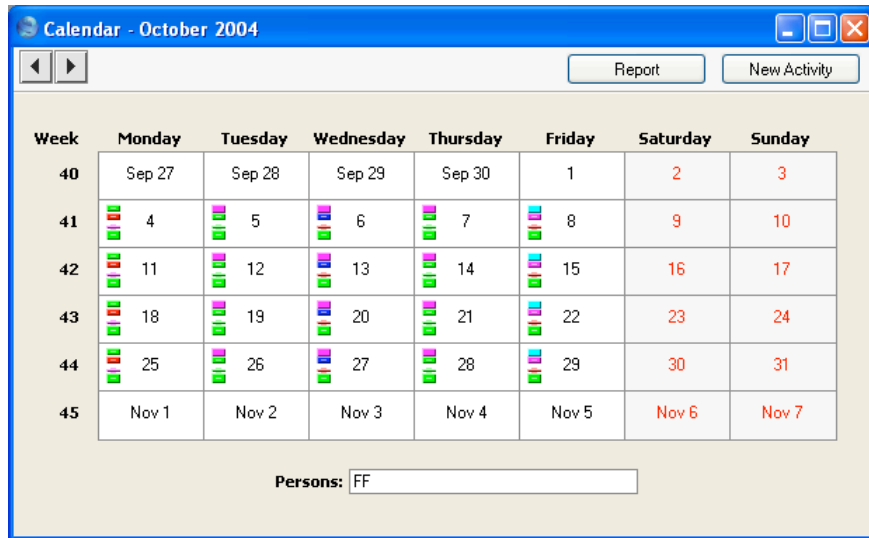
The 'Specify Apply Standard Period' dialog box contains the following fields and values:

| | |
|---------------------------|------------|
| Code: | 2 |
| User: | FF |
| Start Date: | 11/10/2004 |
| Number of periods: | 3 |

Buttons: Run

We have specified that 4/10/2004 is the day that will be used in the first new Activity. So, all Activities from Monday 4/10/2004 (the first date in the Standard Period record) will be copied to Monday 11/10/2004, all Activities from 5/10/2004 will be copied to 12/10/2004 and so on. This cycle will be repeated three times.

This is the result—



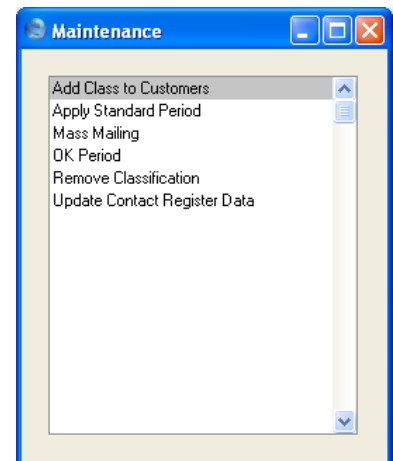
| Week | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday | Sunday |
|------|--------|---------|-----------|----------|--------|----------|--------|
| 40 | Sep 27 | Sep 28 | Sep 29 | Sep 30 | 1 | 2 | 3 |
| 41 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 42 | 11 | 12 | 13 | 14 | 15 | 16 | 17 |
| 43 | 18 | 19 | 20 | 21 | 22 | 23 | 24 |
| 44 | 25 | 26 | 27 | 28 | 29 | 30 | 31 |
| 45 | Nov 1 | Nov 2 | Nov 3 | Nov 4 | Nov 5 | Nov 6 | Nov 7 |

Persons: FF

Maintenance

Introduction

Maintenance functions tend to be used to carry out certain updating tasks, usually involving batch processing and encompassing all or many of the records in the affected register. There are six such functions available in the CRM module. To use them, select 'Maintenance' from the File menu. The following window appears—



Double-click the chosen option. A specification window will then appear, where you can decide how the function is to operate. Click [Run] to operate the function.

Add Class to Customers

This function can be used to add a particular Customer Classification to the Customers that have bought or not bought a specific Item, or to Customers with Contracts containing or not containing a specific Item.

This can be useful if you want to mail these Customers. To do this, run this function and then create a Customer Letter record with the Classification in question on the 'Cat/Class Selection' card. Alternatively, you can use the Classification to produce reports for this set of Customers. Once the Classification has served its purpose, you can remove it from these

Customers using the 'Remove Classification' Maintenance function (described below on page 140).

You can run the Who Has Bought/Not Bought report before using this function if you want a list of the Customers that will be affected.

Period

Paste Special

Reporting Periods setting,
System module

The function will search for Customers that have bought or not bought the specified Item during the period specified here, and add the new Classification to those Customers. If you want the function to ignore this period, check the Exclude Period Selection box below. The period is always ignored if you are working from the Contract register.

Category

Paste Special

Customer Categories setting,
Sales Ledger

If a Customer Category is entered here, the function will search for the Customers belonging to that Category that have bought or not bought the specified Item. It will then add the new Classification to those Customers.

Salesman

Paste Special

Person register, System module

Enter a Person's initials for the new Classification to be added to all Customers with a particular Salesman that have bought or not bought the specified Item.

| Classification | Paste Special | Customer Classifications setting, CRM module |
|-----------------------|----------------------|---|
| | | <p>If a Customer Classification is entered here the function will search for the Customers with that Classification that have bought or not bought the specified Item. It will then add the new Classification to those Customers.</p> <p>If you enter a number of Classifications separated by commas, the function will search for the Customers with all the Classifications that you have entered. If you enter a number of Classifications separated by plus signs (+), the new Classification will be added to all Customers featuring at least one of the Classifications listed. If you enter a Classification preceded by an exclamation mark (!), it will be added to all Customers featuring any Classification except the one listed.</p> <p>For example—</p> |
| 1,2 | | Adds the new Classification to Customers with Classifications 1 and 2 (including Customers with Classifications 1, 2 and 3). |
| 1+2 | | Adds the new Classification to Customers with Classifications 1 or 2. |
| !2 | | Adds the new Classification to all Customers except those with Classification 2. |
| 1,!2 | | Adds the new Classification to Customers with Classification 1 but not to those with Classification 2 (i.e. Customers with Classifications 1 and 2 are not affected). Note the comma before the exclamation mark in this example. |
| !1,!2 | | Adds the new Classification to all Customers except those with Classification 1 or 2 or both. Again, note the comma. |
| Item | Paste Special | Item register |
| | | <p>Specify here the Item that is to be the subject of the function: the new Classification will be added to all Customers that have bought or not bought this Item. The function will have no effect if you do not specify an Item.</p> |

Add Classification Paste Special

Customer Classifications
setting, CRM module

Specify here the Classification that is to be added to every Customer that has bought or not bought the specified Item. If a particular Customer already has this Classification, it will not be added again.

Register

Choose which version of the function is to be used.

Invoices

The function will search approved Invoices to find Customers that have bought or not bought the specified Item.

Contracts

The function will search the Contract register to find Customers that have Contracts containing or not containing the specified Item. Any period specified above will be ignored.

If you choose the Has Not Bought option (below), the function will ignore Customers with no Contracts at all.

Function

Choose whether the new Classification is to be added to Customers that have bought or not bought the specified Item.

Exclude Period Selection

If you want the function to ignore the period specified above (i.e. you want to add the new Classification to all Customers that have bought or not bought the specified Item at any time), check this box.

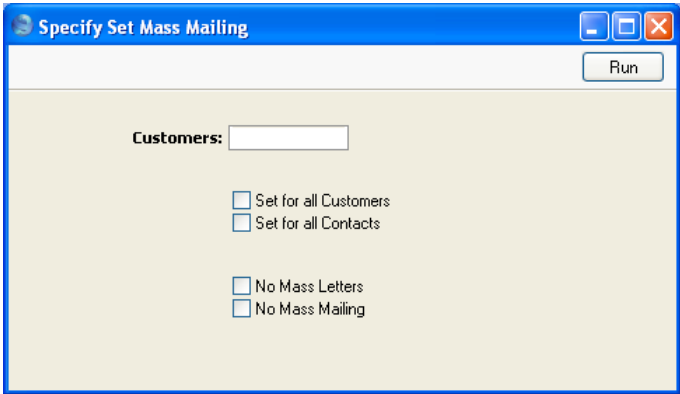
There is a similar Maintenance function in the Sales Ledger, 'Update Customer Classification'. This has the advantage of allowing you to specify the Customers that will be affected. It also allows you to add or remove Classifications to Customers that have bought or not bought any Item belonging to a specific Item Group. However, it does not offer the possibility of adding or removing Classifications based on Items covered by Contract.

Apply Standard Period

Please refer to the section on page 130 describing the Standard Period register for a description of this function.

Mass Mailing

Use this function to update the No Mass Letters and No Mass Emailing options in Customers and Contact Persons.



Customers **Paste Special** Customers and Suppliers in
Customer register

Specify here which Customers are to be affected by the function. You should then use the options below to choose whether the Customers themselves and/or their Contacts are to be updated. If you do not choose at least one of the two options below, the function will have no effect.

Set for all Customers

Check this box if you would like the Customer records in the selection specified above to have their No Mass Letters and No Mass Emailing options updated.

Set for all Contacts

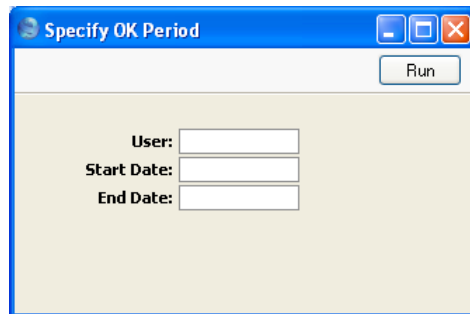
Check this box if you would like the Contacts belonging to the Customers in the selection specified above to have their No Mass Letters and No Mass Emailing options updated.

No Mass Letters If you check this box, the No Mass Letters box in the selected Customers and/or Contacts will be checked when you run this function. If you do not check this box, No Mass Letters box in the selected Customers and/or Contacts will be unchecked.

No Mass Mailing If you check this box, the No Mass Emailing box in the selected Customers and/or Contacts will be checked when you run this function. If you do not check this box, No Mass Emailing box in the selected Customers and/or Contacts will be unchecked.

OK Period

This function marks as Done all Calendar Activities in a specified period.



A dialog box titled "Specify OK Period" with a blue title bar and standard Windows window controls. It contains a "Run" button in the top right corner. Below the button, there are three input fields labeled "User:", "Start Date:", and "End Date:" stacked vertically.

User **Paste Special** Person register, System module
Specify here the Person whose Calendar Activities are to be marked as Done. You must specify a User, otherwise the function will have no effect.

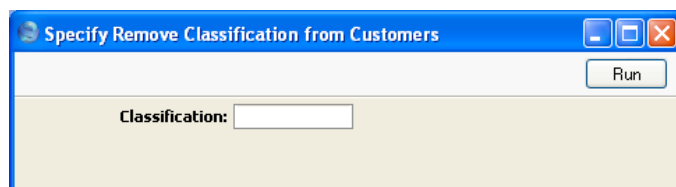
Start Date, End Date

Paste Special Current Date
Use these fields to specify the period for which all Calendar Activities are to be marked as Done.

Press the [Run] button to activate the function.

Remove Classification

This function can be used to remove a Classification from all Customers.



A dialog box titled "Specify Remove Classification from Customers" with a blue title bar and standard Windows window controls. It contains a "Run" button in the top right corner. Below the button, there is a single input field labeled "Classification:".

Classification**Paste Special**

Customer Classifications
setting, CRM module

Specify the single Classification that is to be removed from all Customers. If you want to remove more than one Classification, run the function as many times as necessary.

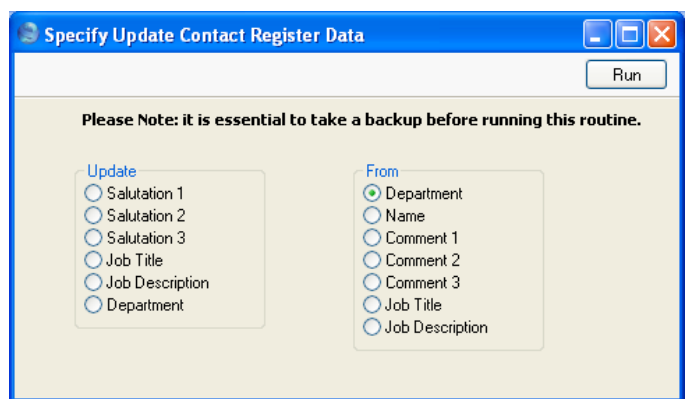
Press the [Run] button to start the updating process.

The 'Update Customer Classification' Maintenance function in the Sales Ledger can also be used to remove a specified Classification from Customers.

Update Contact Register Data

This function can be used to copy information from one field to another in every record in the Contact Person register.

Selecting the function brings up the following dialogue box —



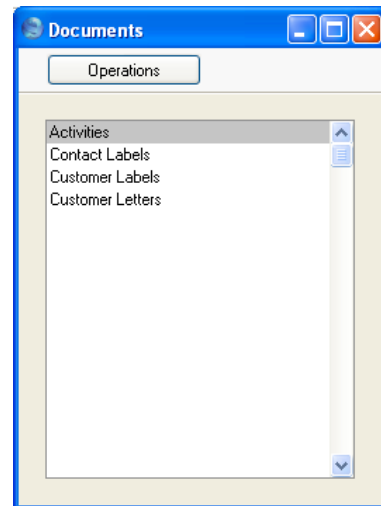
Choose one field to be updated from the set of options on the left. Choose the field that is to provide the information to be copied from the set of options on the right. In the illustration above, the information in the Job Title field in every Contact Person record will be copied to the Job Description field. The Job Title field will not be emptied. Click the [Run] button to update all Contact Persons.

Documents

Introduction

The 'Documents' function permits the printing in batches of particular documents or Forms. It is selected using the 'Documents' item on the File menu or by clicking the [Documents] button in the Master Control panel.

On selecting the function, the window illustrated below appears, listing the documents that can be printed from the CRM module. Each item in the list ("Document") will be printed using a different Form.



To print a document, follow this procedure—

1. Highlight the appropriate item in the list.
2. Using the Operations menu, determine the print destination of the documents. The default is to print to the chosen printer. Other options available are the Print Queue (see the 'Work Area' chapter in the 'Introduction to HansaWorld Enterprise' manual for full details of this feature) or Fax (if your hardware can support this feature).
3. Double-click the document name or press the Enter key. A specification window will then appear, where you can determine the information that is to be included in the printed documents (e.g. which Activities are to be

printed). The specification window for each document is described in detail below.

4. Click [Run] to print the documents.
5. Close the 'Documents' window using the close box.

To determine which Form is printed by each option in the 'Documents' window, follow this procedure—

1. For each option, design a Form using the Form register in the System module. This process is fully described in the 'System Module' manual.
2. Change to the CRM module and open the 'Documents' list window using the 'Documents' item on the File menu or by clicking the [Documents] button in the Master Control panel.
3. Highlight each item in the list and select 'Define Document' from the Operations menu. The subsequent window is used to assign a Form (or more than one Form) to each document and is fully described in the 'Documents' section of the 'Work Area' chapter in the 'Introduction to HansaWorld Enterprise' manual. For example, each option can use different Forms determined perhaps by the Language of the Customer.
4. For each document, the 'Define Document' function only needs be used once. After this has been done, Form selection will be automatic.

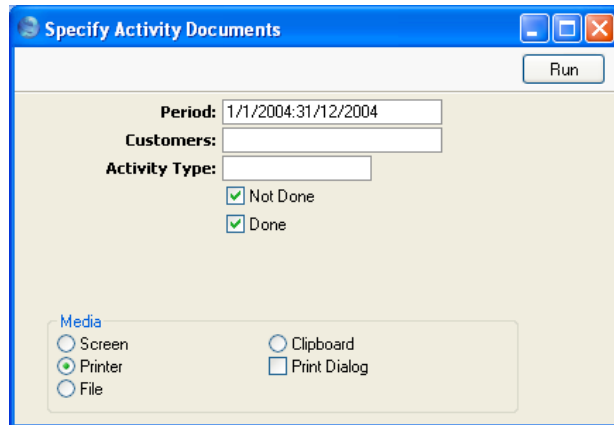
The selection process for each document is described below. In all cases, leave all the fields in the specification window blank if documents for all the records in the database are to be printed. If it is necessary to restrict the number of documents printed, use the fields as described.

Where specified below, it is often possible to report on a selection range, such as a range of Customer Numbers. To do this, enter the lowest and highest values of the range, separated by a colon. For example, to report on Customers 001 to 010, enter "001:010" in the Customer field. Depending on the field, the sort used might be alpha or numeric. In the case of an alpha sort, a range of 1:2 would also include 100, 10109, etc.

Activities

Use this document to print out hard copies of each Activity, perhaps for the files maintained for each Customer. It is also possible to print a single Activity while entering or viewing it by clicking the Printer icon, and to print it to screen by clicking the Preview icon.

Note that an entry must be made to at least one of the two fields below the Period, otherwise no Activities will be printed.



The dialog box titled "Specify Activity Documents" contains the following fields and options:

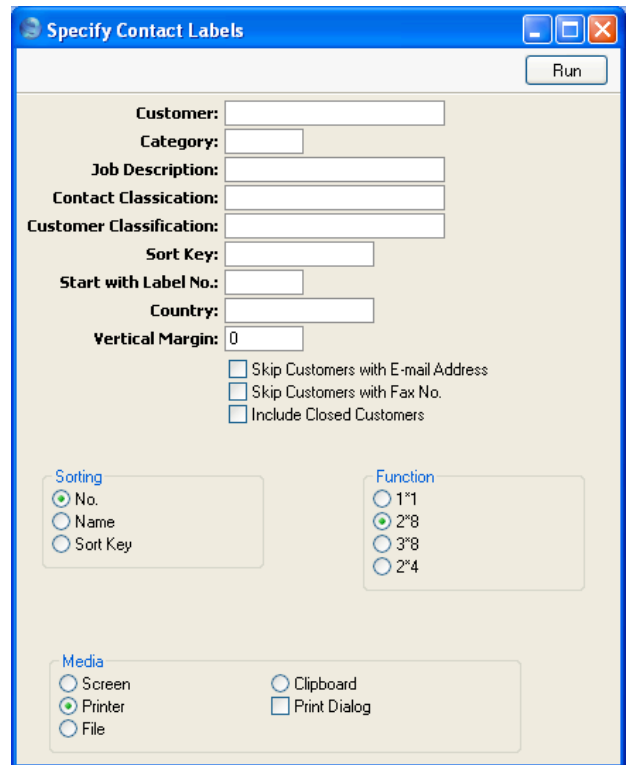
- Period:** A text field containing "1/1/2004:31/12/2004".
- Customers:** An empty text field.
- Activity Type:** An empty text field.
- Not Done:** A checked checkbox.
- Done:** A checked checkbox.
- Media:** A section containing four radio buttons:
 - Screen:** Selected (indicated by a green dot).
 - Printer:** Unselected.
 - File:** Unselected.
 - Clipboard:** Unselected.
 - Print Dialog:** An unchecked checkbox.
- Run:** A button in the top right corner.

| | | |
|----------------------|--|---|
| Period | Paste Special | Reporting Periods setting, System module |
| | Enter the period for which you wish Activities to be printed. To print Activities for a particular day, simply enter the date once. Hansa will then convert it to period format by inserting a colon and repeating the date. | |
| Customer No | Paste Special | Customers and Suppliers in Customer register |
| | Range Reporting | Alpha |
| | Enter a Customer Number (or range of Customer Numbers) to print Activities for a particular Customer. | |
| Activity Type | Paste Special | Activity Types setting, CRM module |
| | Range Reporting | Alpha |
| | Enter an Activity Type Code to print Activities of a particular Type. | |

Not Done, Done Use these options to specify whether not Done and/or Done Activities are to be printed.

Contact Labels

This document prints name and address labels to Contact Persons. It uses the Invoice Address from the 'Address' card of the Contact Person screen. Labels are not printed for the Primary Contacts in the Customer records: use the Customer Labels document for these.



The 'Specify Contact Labels' dialog box contains the following fields and options:

- Customer:** Text input field
- Category:** Text input field
- Job Description:** Text input field
- Contact Classification:** Text input field
- Customer Classification:** Text input field
- Sort Key:** Text input field
- Start with Label No.:** Text input field
- Country:** Text input field
- Vertical Margin:** Text input field (set to 0)
- ☐ Skip Customers with E-mail Address
- ☐ Skip Customers with Fax No.
- ☐ Include Closed Customers
- Sorting:**
 - ☒ No.
 - ☐ Name
 - ☐ Sort Key
- Function:**
 - ☐ 1*1
 - ☒ 2*8
 - ☐ 3*8
 - ☐ 2*4
- Media:**
 - ☐ Screen
 - ☒ Printer
 - ☐ File
 - ☐ Clipboard
 - ☐ Print Dialog

A 'Run' button is located in the top right corner.

Customer

Paste Special

Customers in Customer register

Range Reporting

Alpha

Enter the Customer Number or range of Numbers for whose Contact Persons you want the labels printed. Labels will not be printed for Contacts from Suppliers.

| | | |
|--------------------------------|----------------------|---|
| Category | Paste Special | Customer Categories setting, Sales Ledger |
| | | Select a Customer Category. Labels will be printed for all Contact Persons belonging to Customers in that Category. |
| Job Description | Paste Special | Job Descriptions setting, CRM module |
| | | If you wish to print labels for Contact Persons with a particular Job Description, enter that Job Description here. |
| Contact Classification | | |
| | Paste Special | Customer Classifications setting, CRM module |
| | | Select a Customer Classification. Labels will be printed for all Contact Persons with that Classification. |
| Customer Classification | | |
| | Paste Special | Customer Classifications setting, CRM module |
| | | Select a Customer Classification. Labels will be printed for all Contact Persons belonging to Customers in that Classification. If you enter a number of Classifications separated by commas, labels will only be printed for those Customers featuring all the Classifications listed. |
| Sort Key | | Enter a Sort Key. Labels will be printed for all Contact Persons belonging to Customers with that Sort Key. |
| Start with Label No. | | |
| | | If you will be printing to a sheet of labels, some of which have already been used, specify here where on the sheet you wish to begin printing. |
| Country | Paste Special | Countries setting, System module |
| | | To print labels for Contact Persons belonging to Customers in a particular Country, enter that Country here. |
| Vertical Margin | | If you want the labels to be printed with a non-standard vertical margin (vertical spacing between the labels), |

specify the margin that you want to be used here. The standard margins (which will be used if you leave this field empty) are—

| Label Format | Vertical Margin |
|---------------------|------------------------|
| 2 x 8 | 103 |
| 3 x 8 | 103 |
| 1 x 1 | 1 |
| 2 x 4 | 206 |

Note: entering a vertical margin that is significantly different to standard may result in the printing of fewer labels than expected.

Skip Customers with E-Mail Address

Check this box if you do not want to print labels for Contact Persons belonging to Customers that have email addresses.

Skip Customers with Fax No.

Check this box if you do not want to print labels for Contact Persons belonging to Customers that have fax numbers.

Include Closed Customers

Usually, labels will not be printed for Closed Customers (Customers whose Closed box on the 'Terms' card is checked). If you want to include such Customers in your label-printing run, check this box.

Sorting

The labels can be sorted by Customer Number, Customer Name or Sort Key.

Function

Choose which of the four standard label formats you would like to use.

Illustrated below is a sample CONTACT_LABEL record from the Form register in the System module. Note that each field should only be drawn once: the label printing function will print the fields the appropriate number of times on each page.

The screenshot shows the 'Form CONTACT_LABEL: Inspect' window. At the top, there are buttons for 'Operations', 'New', 'Duplicate', 'Cancel', and 'Save'. Below these are buttons for 'Text', 'Line', 'Frame', 'Field', and 'Picture'. The main canvas displays a form with the following fields:

| |
|-----------|
| Name |
| Contact |
| Address 1 |
| Address 2 |
| Address 3 |

Fields are added to the Form design in the usual way (click the [Field] button and draw a rectangle where you want the field to appear). When the Field dialogue box opens, specify the Fieldname—

The 'Field' dialog box is shown with the following settings:

- Fieldname:** Name
- Field Argument:** (empty)
- Left:** 42
- Top:** 29
- Right:** 242
- Bottom:** 46
- Style:** FIELD_T
- Vertical Spacing:** 12
- Escape Sequence:** (empty)
- Format:** 1
- Justification:** ☒ Left, ☐ Right, ☐ Centre
- Clipping:** ☒ Off, ☐ On
- Word Wrap:** ☒ Off, ☐ On, flow down, ☐ On, flow up
- Exclude from page:** ☐ First, ☐ Middle, ☐ Last, ☐ Single

If the labels on each row are not aligned properly when printed, set the Format to 1.

If you want static text to be printed on your labels (i.e. text that identifies the information on the labels, such as “Contact Name”), follow these steps—

1. Click the [Field] button and draw a rectangle where you want the static text to appear. The Field dialogue box opens.
2. Leave the Fieldname blank and enter the static text in the Field Argument field.

Fieldname: 0

Field Argument: Name

Left: 261

Top: 55

Right: 432

Bottom: 7

Style: FIELD_H

Vertical Spacing: 0

Escape Sequence:

Format: 1

Justification

☒ Left

☐ Right

☐ Centre

Clipping

☒ Off

☐ On

Word Wrap

☒ Off

☐ On, flow down

☐ On, flow up

Exclude from page

☐ First

☐ Middle

☐ Last

☐ Single

OK Cancel

3. Click [OK] to save.
4. Do not use the [Text] button for this purpose: any text entered this way will be printed for the first label only.

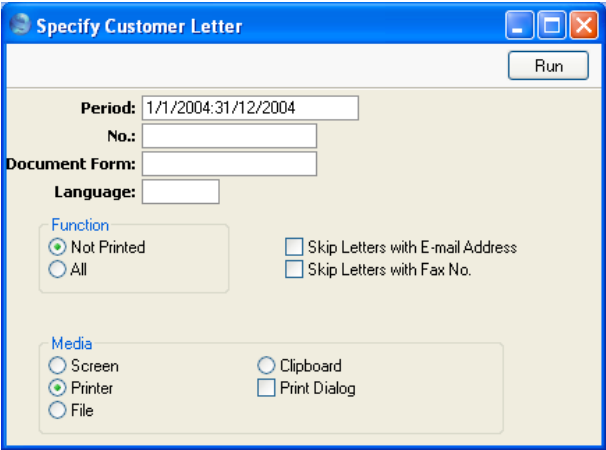
Customer Labels

This document prints name and address labels to Customers. The Invoice Address on the 'Contact' card of each Customer record is used.

The document is also available in the Sales Ledger and the Contracts module: please refer to the 'Customers and Suppliers' manual for full details.

Customer Letter

This document prints letters to Customers. It first searches for records in the Customer Letter register matching the search criteria entered in the 'Specify Customer Letter Documents' window as described below. For each Customer Letter found, it then prints the letter text entered on the 'Text' card to the recipients as determined on the 'Customer Selection' and 'Cat/Class Selection' cards. Before printing, you can obtain a list of the recipients using the Letter List report.

A screenshot of a Windows-style dialog box titled "Specify Customer Letter". It has a blue title bar with standard window controls (minimize, maximize, close) and a "Run" button in the top right. The main area is light beige and contains several input fields and groups of radio buttons. The "Period:" field is pre-filled with "1/1/2004:31/12/2004". Below it are empty fields for "No.:", "Document Form:", and "Language:". There are two groups of radio buttons: "Function" with options "Not Printed" (selected) and "All"; and "Media" with options "Screen", "Printer" (selected), and "File". To the right of the "Function" group are two checkboxes: "Skip Letters with E-mail Address" and "Skip Letters with Fax No.", both of which are unchecked.

| | | |
|-----------------|---|--|
| Period | Paste Special | Reporting Periods setting, System module |
| | Subject to the other search criteria below, letters will be printed from all Customer Letter records whose Date falls in the period entered here. | |
| No. | Range Reporting | Numeric |
| | To print letters from a specific Customer Letter record, enter its Number here. Alternatively, enter a range of Numbers separated by a colon (:). Remember that letters printed from any unapproved Customer Letter records in the range will be marked with the text “Test Printout”. | |
| Category | Pate Special | Customer Categories setting, Sales Ledger |
| | If a Customer Category is specified here, letters will be printed from all Customer Letter records with that Customer Category showing on the ‘Cat/Class Selection’ card. | |
| | Remember that if a Customer Letter has a Customer Category on the ‘Cat/Class Selection’ card and its Customer field on the ‘Customer Selection’ card is blank, letters will be printed to all Customers belonging to that Category (except those marked as No Letters or No Mass Mailing on the ‘Terms’ card of their Customer records). However, if the Customer field on the ‘Customer Selection’ card contains a value, letters will | |

be printed to that Customer or range of Customers, irrespective of whether they belong to the Category.

| | | |
|----------------------|----------------------|------------------------------|
| Document Form | Paste Special | Form register, System module |
|----------------------|----------------------|------------------------------|

Specifying a Form here will have two consequences. First, letters will be printed from all Customer Letter records with that Form specified in the Document field on the 'Header' card. Second, the letters will be printed using the Form specified here, not the Form specified in the 'Define Document' window as described in the introduction to this section.

| | | |
|-----------------|----------------------|----------------------------------|
| Language | Paste Special | Languages setting, System module |
|-----------------|----------------------|----------------------------------|

When letters from a Customer Letter record are printed, the selection of the Form used (i.e. the letter template) is determined using one of two methods. You can enter a Form in the Document field on the 'Header' card or, if the Document field is empty, you can use the 'Define Document' window for the Customer Letter document. The second method allows letters to be printed using different Forms depending on the Language of the Customer Letter.

If you are using the second method (i.e. if the Document field above is empty), you can override the Language in the Customer Letter by specifying a Language here. This can be useful if, for example, you have a standard letter that is sometimes printed and sometimes faxed. In this case, enter separate rows in the 'Define Document' window for printing and faxing. The fax row should have a dedicated Language (e.g. "FAX") in the Lang field. When you create the Customer Letter, enter the appropriate Language on the 'Header' card to use the default printer (usually the Language can be left blank in both the Customer Letter and the 'Define Document' window). When you need to fax the letter, enter the Language for the fax server here. This will override the Language in the Customer Letter record.

Note that this is not a search filter. Entering a Language here will not cause letters to be printed only from those Customer Letter records with that Language specified in the Document field on the 'Header' card. Note too that a Language entered here will have no effect over a

Customer Letter with a Document specified on its 'Header' card.

Function

You can choose to print letters from all Customer Letters in the selection, or just from those that have not been used before. Make that choice using these options.

Skip Letters with E-mail Address

You can choose to print letters from all Customer Letters in the selection, or just from those that do not have E-mail Addresses on their 'Address' cards. Check this box for the latter option.

Skip Letters with Fax No.

You can choose to print letters from all Customer Letters in the selection, or just from those that do not have Fax Numbers on their 'Address' cards. Check this box for the latter option.

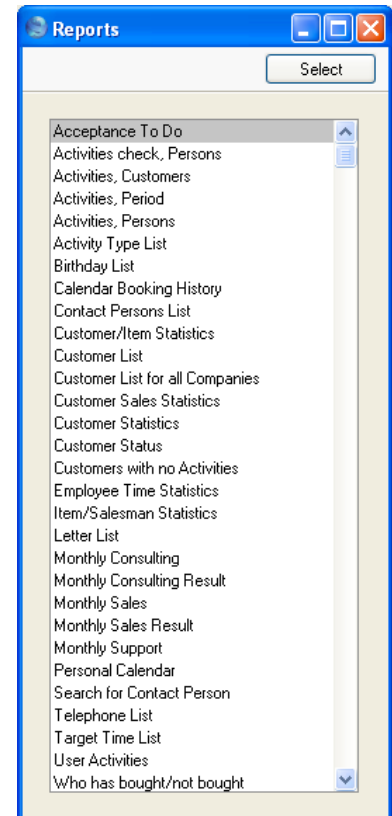
When designing the Form to be used when printing Customer Letters, two fields are available to print the Date. The Date field prints a short date (e.g. 1/1/2005). The Date with Month in Words field prints a longer date (e.g. 1 January 2005).

Reports

Introduction

As with all modules, to print a report in the CRM module, select 'Reports' from the File menu or click [Reports] in the Master Control panel. The keyboard shortcut Ctrl-R or ⌘-R can also be used. Then, double-click the appropriate item in the list.

The following reports are available in the CRM module—



A specification window will then appear, where you can decide what is to be included in the report. Leave all the fields in this window blank if the report is to cover all the records in the database. If it is necessary to restrict the

coverage of the report, use the fields as described individually for each report.

Where specified below, it is often possible to report on a selection range, such as a range of Customers. To do this, enter the lowest and highest values of the range, separated by a colon. For example, to report on Customers 001 to 010, enter “001:010” in the Customer field. Depending on the field, the sort used might be alpha or numeric. In the case of an alpha sort, a range of 1:2 would also include 100, 10109, etc.

Using the options at the bottom of the specification window, determine the print destination of the report (the default is to print to screen). You can initially print to screen and subsequently send the report to a printer using the Printer icon.

Once you have entered the reporting criteria and have chosen a print destination, click [Run].

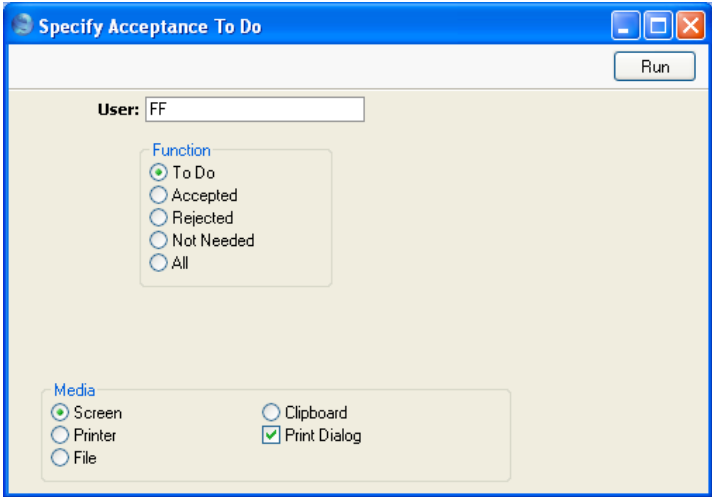
With a report in the active window, the ‘Recalculate’ command on the Operations menu can be used to update the report after making alterations to background data. The ‘Reopen Report Specification’ command on the same menu can be used to update the report using different reporting criteria.

Acceptance To Do

In some large companies, it is necessary for Purchase Invoices to pass through an acceptance process before they can be approved. This process involves the Invoices being accepted by the members of an Acceptance Group. Use this report to list the Invoices that are awaiting acceptance by a particular Person, or to list the Invoices that a particular Person has accepted in the past.

When printed to screen, the Acceptance To Do list has Hansa’s Drill-down feature. If you produce the report for yourself, click on a Purchase Invoice Number. A new report window will open, showing the full acceptance history for the Purchase Invoice in question. From this window, you can print the Purchase Invoice and then accept or reject it, as appropriate.

Please refer to the ‘Purchase Ledger’ manual for a full description of accepting Purchase Invoices.



| | | |
|-----------------|----------------------|---|
| User | Paste Special | Person register, System module |
| | | Enter a Person's initials to produce a report listing the Purchase Invoices that were or are to be accepted by a single employee. If you produce the report for yourself, you can click on a Purchase Invoice Number to open new report window showing the full acceptance history for the Purchase Invoice in question. If the Purchase Invoice has not yet been accepted, you can begin accepting it from here. |
| Function | | Use this options to include Purchase Invoices with a particular Acceptance Status in the report. |

Activities check, Persons

This report lists the days during the report period when employees worked too many or too few hours. The number of hours worked per day is calculated from Time Activities only (Done and not Done). Invalidated and Private Activities are not included.

| | | |
|----------------------|------------------------|--|
| Period | Paste Special | Reporting Periods setting, System module |
| | | The report period. The report will include all Time Activities whose Start Date falls in the period (Activities whose Task Type is Calendar and whose Calendar Type is Time). |
| Person | Paste Special | Person register, System module |
| | Range Reporting | Alpha |
| | | Enter a Person's initials to produce a report analysing the hours worked by a single employee. Activities with the Person in the Cc field will be included in the calculations, but Private Activities will not be included. |
| Display Group | | If you enter a Display Group here, the report will analyse the hours worked by all Persons belonging to that Display Group. |
| Activity Type | Paste Special | Activity Types setting, CRM module |
| | | If you enter an Activity Type here, only Activities with that Activity Type will be used in the report. |

| | | |
|-------------------------|----------------------|---|
| Project | Paste Special | Project register, Job Costing module |
| | | Enter a Project Number to analyse the hours worked on a particular Project. Activities with the Project Number entered on their 'Project' card will be included in the report calculations. |
| Fewer Hours than | | If you want the report to list the days during the report period when any employee worked for fewer than a specified number of hours, enter that number here. |
| More Hours than | | If you want the report to list the days during the report period when any employee worked for more than a specified number of hours, enter that number here. |
| Function | | These options can be used to control the level of detail shown in the report. |
| | Overview | This option produces a report containing a separate section for each day during the report period. This will contain the name of any employee who worked for more or fewer than the number of hours specified above, together with the number of hours worked. |
| | Detailed | This option is similar to the Overview, with the exception that the Activities worked by each employee are listed individually. When printed to screen, this version of the report has Hansa's Drill-down feature. Click on an Activity Comment to open the Activity record. |
| Function | | Use these options to specify how weekends are to be included in the report. Excluding weekends will more usually be appropriate if you are using the Fewer Hours Than option above, because otherwise most weekends will be shown with zero hours worked. |

Activities, Customers

This report lists Activities of all Task Types, sorted by Customer. Included in the report are the number of Activities and total time for each Customer and for all Customers. The Private Activities of the Person producing the report are marked with an asterisk (*). The Private Activities of other users are not shown in the report.

When printed to screen, the Activities, Customers report has Hansa's Drill-down feature. Click on a Person's initials to produce an Activities, Persons report for that Person, or on an Activity Number to open the Activity record.

Period**Paste Special**

Reporting Periods setting,
System module

Enter a reporting period: Activities whose Start Dates fall in this period will be shown in the report. To produce a report for a particular day, simply enter the date once. Hansa will then convert it to period format by inserting a colon and repeating the date.

Customers**Paste Special**

Customers and Suppliers in
Customer register

Range Reporting

Alpha

Enter a Customer Number or a range of Numbers to list Activities recorded or scheduled for that Customer (or for the range of Customers).

Person**Paste Special**

Person register, System module

Enter a Person's initials to list the Activities recorded, scheduled or carried out by this Person. If you list the

Activities of another Person, their Private Activities will not be included.

Cust. Classification

Paste Special

Customer Classifications
setting, CRM module

Enter a Classification Code to list Activities featuring Customers with a particular Classification. If you enter a number of Classifications separated by commas, Activities will only be listed for those Customers featuring all the Classifications that you have entered. If you enter a number of Classifications separated by plus signs (+), Activities will be listed for all Customers featuring at least one of the Classifications listed. If you enter a Classification preceded by an exclamation mark (!), Activities will be listed for all Customers featuring any Classification except the one listed.

For example—

| | |
|-------|---|
| 1,2 | Lists Activities for Customers with Classifications 1 and 2 (including those for Customers with Classifications 1, 2 and 3). |
| 1+2 | Lists Activities for Customers with Classifications 1 or 2. |
| !2 | Lists Activities for all Customers except those with Classification 2. |
| 1,!2 | Lists Activities for Customers with Classification 1 but not those for Customers with Classification 2 (i.e. those for Customers with Classifications 1 and 2 are not shown). Note the comma before the exclamation mark in this example. |
| !1,!2 | Lists Activities for all Customers except those with Classification 1 or 2 or both. Again, note the comma. |

Activity Type

Paste Special

Activity Types setting, CRM
module

Enter an Activity Type to list Activities of that Type.

| | | |
|------------------------------|----------------------|--|
| Customer Cat. | Paste Special | Customer Categories setting, Sales Ledger |
| | | Enter a Category Code to list Activities featuring Customers in a particular Category. |
| Project | Paste Special | Project register, Job Costing module |
| | | Enter a Project Number to list the Activities relating to that Project. |
| Activity Class | Paste Special | Activity Classes setting, CRM module |
| | | Enter an Activity Class to list Activities with Activity Types belonging to that Class. |
| Priority | | Enter a Priority to list Activities with that Priority. |
| Short Key | | Enter a Short Code to list Activities featuring Customers with a particular Short Code (in the header of the Customer record). |
| Function | | Use these options to control the level of detail featured in the report. In both cases, the report is sorted by Customer. |
| | Overview | This report contains a single row per Activity, showing Date, Activity Type, Person, Contact and Text (from the Activity header). |
| | Detailed | In addition to the information shown in the Overview, this option shows all details entered in the grid area on the 'Text' card of the Activity screen. |
| Specify | | Use these options to determine whether the report is to contain only Done Activities, not Done Activities or both. |
| Show Customer Details | | Check this box if you would like the Invoice and Delivery Address, Telephone and Fax Numbers, Short Code, Sort Key, Category, Classification, Payment Terms, Department, Object, VAT Registration Number, Comment and Warning of each Customer to be included in the report. |

Show Contact Details

Check this box if you would like Telephone, Fax and Mobile Numbers from Contact Person records to be shown in the report. To use this option, you must also choose to print the Detailed version of the report.

Show Activities without Type only

Activities that do not have an Activity Type will be included in the report. If you want to list these Activities only, use this option.


Activities, Period


Using the Display Groups setting in the System module, you can divide the employees of your company into groups. These groups might represent different types of work or the various departments in your company. The report uses a timetable format to display what each member of a particular Display Group is doing for each day of the report period. The information is taken from Calendar Activities.

The example report illustrated below shows the Calendar Activities of the members of the "Sales" Display Group for the second week in November. The descriptions come from the Text field in the header of each Activity. The report uses the default working day of 8:00 - 18:00. An Activity is listed separately for each Person included in the Persons and Cc fields. If a Person has more than one Activity beginning during an hour, only the earliest one is shown. Private Activities will be shown in the report.

Activities for Period

Operations





Search

1/8/2004

| | | | | | | | | | | | |
|-------|------|------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Empl. | 8:00 | 9:00 | 10:00 | 11:00 | 12:00 | 13:00 | 14:00 | 15:00 | 16:00 | 17:00 | 18:00 |
| FF | | | | | | | | | | | |
| IP | | | | | | | | | | | |
| NB | | | | | | | | | | | |

2/8/2004

| | | | | | | | | | | | |
|-------|------|---------|---------|---------|---------|-------|---------|---------|---------|---------|-------|
| Empl. | 8:00 | 9:00 | 10:00 | 11:00 | 12:00 | 13:00 | 14:00 | 15:00 | 16:00 | 17:00 | 18:00 |
| FF | | Chase u | Chase u | Sales v | Sales v | | Phone a | Trainin | Trainin | Trainin | |
| IP | | | | | | | | Trainin | Trainin | Trainin | |
| NB | | | | | | | | Trainin | Trainin | Trainin | |

3/8/2004

| | | | | | | | | | | | |
|-------|------|---------|---------|---------|---------|-------|---------|---------|---------|---------|-------|
| Empl. | 8:00 | 9:00 | 10:00 | 11:00 | 12:00 | 13:00 | 14:00 | 15:00 | 16:00 | 17:00 | 18:00 |
| FF | | Chase u | Chase u | Sales v | Sales v | | Phone a | Trainin | Trainin | Trainin | |
| IP | | | | | | | | Trainin | Trainin | Trainin | |
| NB | | | | | | | | Trainin | Trainin | Trainin | |

4/8/2004

| | | | | | | | | | | | |
|-------|------|---------|---------|---------|---------|-------|---------|---------|---------|---------|-------|
| Empl. | 8:00 | 9:00 | 10:00 | 11:00 | 12:00 | 13:00 | 14:00 | 15:00 | 16:00 | 17:00 | 18:00 |
| FF | | Chase u | Chase u | Sales v | Sales v | | Phone a | Trainin | Trainin | Trainin | |
| IP | | | | | | | | Trainin | Trainin | Trainin | |
| NB | | | | | | | | Trainin | Trainin | Trainin | |

The 'Specify Activities for Period' window is opened when you double-click 'Activities, Period' in the 'Reports' list—

| Specify Activities List, Period | |
|--|---------------------|
| Run | |
| Period: | 1/1/2004:31/12/2004 |
| Display Group: | |
| Time Class: | |
| Show <input checked="" type="radio"/> Profile <input type="radio"/> Time <input type="radio"/> Time Profile | |
| Shows Activities for specified Display Group only | |
| Media <input checked="" type="radio"/> Screen <input type="radio"/> Printer <input type="radio"/> File <input type="radio"/> Clipboard <input checked="" type="checkbox"/> Print Dialog | |

| | | |
|----------------------|----------------------|--|
| Period | Paste Special | Reporting Periods setting, System module |
| | | Enter a reporting period: Activities whose Start Dates fall in this period will be shown in the report. To produce a report for a particular day, simply enter the date once. Hansa will then convert it to period format by inserting a colon and repeating the date. |
| Display Group | | Enter a Display Group: the report will show the Activities of all Persons belonging to that Display Group. A Display Group must be specified, otherwise no report will be produced. |
| Time Class | Paste Special | Time Classes setting, Job Costing module |
| | | As a default, the report displays Activities whose Start Time is between 8:00 and 18:00. If you want to use a different working day (e.g. 9:00 - 17:00), set this up in a Time Class record and then quote this Time Class when producing the report. |
| Show | | Use these options to determine whether the report is to contain only Time Activities, Profile Activities or both. |

Activities, Persons

This report is a list of Activities sorted by Person. The Private Activities of the Person producing the report are included, but those of other users are not.

When printed to screen, the Activities, Persons report has Hansa's Drill-down feature. Click on a Customer Number to produce an Activities, Customers report for that Customer.

Period

Paste Special

Reporting Periods setting,
System module

Enter a reporting period: Activities whose Start Dates fall in this period will be shown in the report. To produce a report for a particular day, simply enter the date once. Hansa will then convert it to period format by inserting a colon and repeating the date.

Person

Paste Special

Person register, System module

Range Reporting

Alpha

Enter a Person's initials to list the Activities recorded, scheduled or carried out by this Person. If you list the Activities of another Person, their Private Activities will not be included.

Customers

Paste Special

Customers and Suppliers in
Customer register

Range Reporting

Alpha

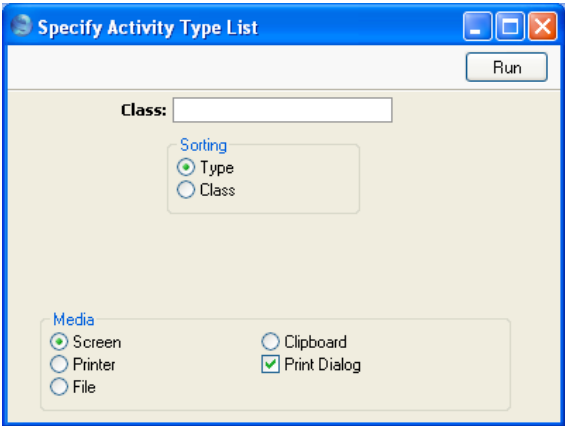
Enter a Customer Number or a range of Numbers to list Activities recorded or scheduled for that Customer (or for the range of Customers).

| Classification | Paste Special | Customer Classifications setting, CRM module |
|-----------------------|----------------------|---|
| | | Enter a Classification Code to list Activities featuring Customers with a particular Classification. If you enter a number of Classifications separated by commas, Activities will only be listed for those Customers featuring all the Classifications that you have entered. If you enter a number of Classifications separated by plus signs (+), Activities will be listed for all Customers featuring at least one of the Classifications listed. If you enter a Classification preceded by an exclamation mark (!), Activities will be listed for all Customers featuring any Classification except the one listed. |
| | | For example— |
| 1,2 | | Lists Activities for Customers with Classifications 1 and 2 (including those for Customers with Classifications 1, 2 and 3). |
| 1+2 | | Lists Activities for Customers with Classifications 1 or 2. |
| !2 | | Lists Activities for all Customers except those with Classification 2. |
| 1,!2 | | Lists Activities for Customers with Classification 1 but not those for Customers with Classification 2 (i.e. those for Customers with Classifications 1 and 2 are not shown). Note the comma before the exclamation mark in this example. |
| !1,!2 | | Lists Activities for all Customers except those with Classification 1 or 2 or both. Again, note the comma. |
| Activity Type | Paste Special | Activity Types setting, CRM module |
| | | Enter an Activity Type to list Activities of that Type. |
| Display Group | | If you enter a Display Group here, the report will list the Activities recorded, scheduled or carried out by all Persons belonging to that Display Group. |
| Function | | Use these options to control the level of detail featured in the report. In both cases, the report is sorted by Person. |

| | |
|-----------------|---|
| Overview | This report contains a single row per Activity, showing Date, Activity Type, Person, Contact and Text (from the Activity header). |
| Detailed | In addition to the information shown in the Overview, this option shows all details entered in the grid area on the 'Text' card of the Activity screen. |
| Specify | Use these options to determine whether the report is to contain only Done Activities, not Done Activities or both. |
| Specify | Use these options to determine whether the report is to contain Calendar Activities, To Do Activities or Timed To Do Activities, or any combination. |

Activity Type List

This report is a list of the Activity Types recorded in the database, showing Code, Name, Item and Activity Class.



| | | |
|----------------|------------------------|--|
| Class | Paste Special | Activity Classes setting, CRM module |
| | Range Reporting | Alpha |
| | | Enter an Activity Class to list the Activity Types belonging to that Class. |
| Sorting | | Choose whether you would like the report sorted by Activity Type or by Activity Class. |

Birthday List

This report can be used to list all Contact Persons sharing a birthday. The report is compiled from information in the Date of Birth field on the 'Address' card of each Contact Person record. As well as the birthday of each Contact, the report shows their Name, Title, Address, Telephone, Fax and Mobile Numbers, Email Address, Department and Customer.

When printed to screen, this report has Hansa's Drill-down feature. Click on any Customer Number to open an individual Customer record. Each Contact in the report also has a [Create Reminder in Day Planner] text button. Click this text to create an Activity to remind you to call or mail the Contact on their birthday. The new Activity will be created but not opened. The Task Type of the new Activity will be Timed To Do, the Person will be the current user and the Activity Date will be the Contact's birthday. The Activity will appear in the right-hand panel of the current user's Day Planner on the appropriate day.

Period

Paste Special

Reporting Periods setting,
System module

The report will list all Contact Persons whose birthday falls in the period specified here. For example, if the period is 1/6/2004:30/6/2004, the report will list all Contact Persons whose birthday is in June. The year is not used.

If you want to produce a report for a single day, simply enter the date once. Hansa will then convert it to period format by inserting a colon and repeating the date.

Customer Category**Paste Special**

Customer Categories setting,
Sales Ledger

Enter a Customer Category to show Contact Persons
belonging to Customers with that Category.

Customer**Paste Special**

Customers and Suppliers in
Customer register

Range Reporting

Alpha

Enter a Customer Number to list the Contact Persons
that work for that Customer.

Show Closed

Check this box if you would like Closed Contact Persons
to be included in the report.

Calendar Booking History

This report is a list of Calendar Activities comparing the dates the records
were created with their Start Dates.

When printed to screen, the Calendar Booking History has Hansa's Drill-
down feature. Click on an Activity Number to open the Activity record.
Private Activities are shown in the report, but drill-down will be disabled for
them.

Specify Calendar Booking History

Run

Period: 1/1/2004:31/12/2004

Customer:

Activity Class:

Activity Type:

Person:

Display Group:

Sorting

☒ Start Date

☐ Created Date

☐ Activity Type

☐ Customer

Calendar Types

☒ Time

☐ Profile

☐ Don't show

Media

☒ Screen

☐ Printer

☐ File

☐ Clipboard

☒ Print Dialog

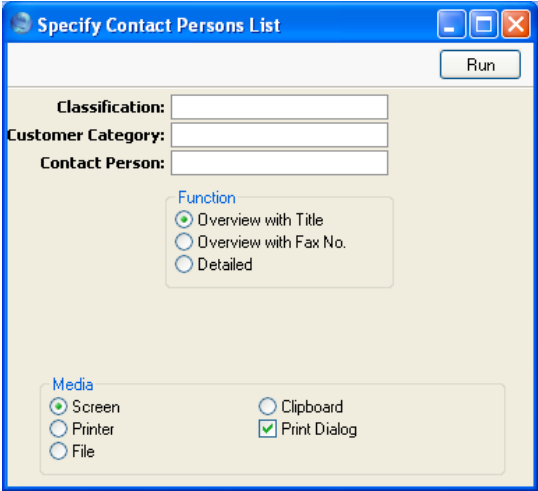
| | | |
|-----------------------|------------------------|--|
| Period | Paste Special | Reporting Periods setting, System module |
| | | Enter a reporting period: Activities whose Start Dates fall in this period will be shown in the report. To produce a report for a particular day, simply enter the date once. Hansa will then convert it to period format by inserting a colon and repeating the date. |
| Customer | Paste Special | Customers and Suppliers in Customer register |
| | Range Reporting | Alpha |
| | | Enter a Customer Number or a range of Numbers to list Activities recorded or scheduled for that Customer (or for the range of Customers). |
| Activity Class | Paste Special | Activity Classes setting, CRM module |
| | | Enter an Activity Class to list Activities with Activity Types belonging to that Class. |
| Activity Type | Paste Special | Activity Types setting, CRM module |
| | | Enter an Activity Type to list Activities of that Type. |
| Person | Paste Special | Person register, System module |
| | Range Reporting | Alpha |
| | | Enter a Person's initials to list the Activities recorded, scheduled or carried out by this Person. If you list the Activities of another Person, their Private Activities will not be included. |
| Display Group | | If you enter a Display Group here, the report will list the Activities recorded, scheduled or carried out by all Persons belonging to that Display Group. |
| Sorting | | The report contains separate sections for the Activities of each Person. Choose one of these options to specify the order in which the Activities are to be listed in those sections. |
| Calendar Type | | Use these options to determine whether the report is to contain Time Activities, Profile Activities and/or Don't Show Activities. |

Contact Person List

This report lists Contacts in the Contact Person register, together with contact details (telephone, fax and mobile numbers and email address).

A Contact List report for a single Contact Person can be printed from their record in the Contact Person register by clicking the Printer icon.

When printed to screen, this report has Hansa’s Drill-down feature. Click on any Contact Name to open an individual Contact Person record.



Classification **Paste Special** Customer Classifications setting, CRM module

Enter a Classification to list Contact Persons with that Classification. If you enter a number of Classifications separated by commas, only those Contact Persons featuring all the Classifications listed will be listed. If you enter a number of Classifications separated by plus signs (+), all Contact Persons featuring at least one of the Classifications listed will be shown. If you enter a Classification preceded by an exclamation mark (!), all Contact Persons featuring any Classification except the one listed will be shown.

For example—

- 1,2
- Lists Contact Persons with Classifications 1 and 2 (including Contact Persons with Classifications 1, 2 and 3).

| | |
|-------|---|
| 1+2 | Lists Contact Persons with Classifications 1 or 2. |
| !2 | Lists all Contact Persons except those with Classification 2. |
| 1,!2 | Lists Contact Persons with Classification 1 but excludes those with Classification 2 (i.e. Contact Persons with Classifications 1 and 2 are not shown). Note the comma before the exclamation mark in this example. |
| !1,!2 | Lists all Contact Persons except those with Classification 1 or 2 or both. Again, note the comma. |

Customer Category

Paste Special Customer Categories setting, Sales Ledger

Enter a Customer Category to list Contact Persons belonging to Customers with that Category.

Contact Person **Paste Special** Contact Person register, CRM module

Enter the name of a Contact Person to print their details only.

Function These options control the amount of information shown in the report. All information is taken from the Contact Person register.

Overview with Title

This option shows the name of each Contact Person, together with their Customer Number and Name, Job Description and Telephone Number.

Overview with Fax No.

This option is similar to the Overview with Title described above, but shows the Fax Number instead of the Job Description.

Detailed In addition to the information shown in the Overview, this option also shows the full address for each Contact together with E-mail Address, Title, Job Description and Telephone, Fax and Mobile Numbers.

Customer/Item Statistics

Please refer to the 'Items and Pricing' manual for full details of this report.

Customer List

Please refer to the 'Customers and Suppliers' manual for full details of this report.

Customer List for all Companies

Please refer to the 'Customers and Suppliers' manual for full details of this report.

Customer Sales Statistics

Please refer to the 'Customers and Suppliers' manual for full details of this report.

Customer Statistics

Please refer to the 'Customers and Suppliers' manual for full details of this report.

Customer Status

Please refer to the 'Customers and Suppliers' manual for full details of this report.

Customers with no Activities

This report is a list of Customers that have not been contacted during the report period.

When printed to screen, this report has Hansa's Drill-down feature. Click on any Customer Number to open an individual Customer record.

| | | |
|-----------------------|----------------------|---|
| Period | Paste Special | Reporting Periods setting, System module |
| | | Enter the report period: the report will list the Customers for whom there are no Activities with a Start Date that falls within that period. |
| Activity Type | Paste Special | Activity Types setting, CRM module |
| | | If an Activity Type is entered here, the report will list the Customers for whom no Activities of that Type were recorded during the report period. |
| Cust. Category | Paste Special | Customer Categories setting, Sales Ledger |
| | | Enter a Customer Category here if you would like the report to list the Customers belonging to that Category that have not been contacted during the report period. |
| Classification | Paste Special | Customer Classifications setting, CRM module |
| | | Enter a Customer Classification to show Customers with that Classification. If you enter a number of |

Classifications separated by commas, only those Customers featuring all the Classifications listed will be shown. If you enter a number of Classifications separated by plus signs (+), all Customers featuring at least one of the Classifications listed will be shown. If you enter a Classification preceded by an exclamation mark (!), all Customers featuring any Classification except the one listed will be shown.

For example—

| | |
|-------|---|
| 1,2 | Lists Customers with Classifications 1 and 2 (including Customers with Classifications 1, 2 and 3). |
| 1+2 | Lists Customers with Classifications 1 or 2. |
| !2 | Lists all Customers except those with Classification 2. |
| 1,!2 | Lists Customers with Classification 1 but excludes those with Classification 2 (i.e. Customers with Classifications 1 and 2 are not shown). Note the comma before the exclamation mark in this example. |
| !1,!2 | Lists all Customers except those with Classification 1 or 2 or both. Again, note the comma. |

Sales Person

Paste Special

Person register, System module

Enter a Person's initials to list the Customers with a particular Salesman that have not been contacted during the report period.

Employee Time Statistics

This report is a list of employees, comparing the planned and actual hours that each one worked during the report period. Depending on the comparison method selected, the numbers of hours are calculated using Activities whose Start Date falls in the report period and Target Time records whose Start Date is most immediately prior to the report period. Please refer to the description of the Target Time register on page 89 for an example.

Calendar Activities only will be included in the comparison. Activities that have been marked as Don't Show are not included in the calculations.

Similarly, Activities with Activity Types belonging to Activity Classes marked Exclude from Time Statistics are not included in the calculations.

| | | |
|------------------|------------------------|---|
| Period | Paste Special | Reporting Periods setting, System module |
| | | The report period. Depending on the comparison method chosen (see below), the report will include all Activities whose Start Date falls in the period, and the Target Time record for the employee in question whose Start Date is most immediately prior to the start of the report period. Any Target Time records with a Start Date during the report period will be included as well. |
| Employees | Paste Special | Person register, System module |
| | Range Reporting | Alpha |
| | | Enter a Person's initials to produce a report analysing the hours worked by a single employee. |

| | | |
|----------------------|------------------------|--|
| Projects | Paste Special | Project register, Job Costing module |
| | Range Reporting | Alpha Enter a Project Number to analyse the hours worked on a particular Project. Activities with the Project Number entered on their 'Project' card will be included in the report calculations. This field will usually be used together with the Invoiceable/Actual comparison method. |
| Customers | Paste Special | Customers in Customer register |
| | Range Reporting | Alpha Enter a Customer Number to produce a report analysing the hours worked for a single Customer or range of Customers. |
| Types | Paste Special | Activity Types setting, CRM module |
| | Range Reporting | Alpha If you enter an Activity Type or range of Activity Types here, only Activities and Target Time records with those Activity Types will be used in the report. |
| Class | Paste Special | Activity Classes setting, CRM module |
| | | If you enter an Activity Class here, only Activities and Target Time records whose Activity Types belong to that Class will be used in the report. |
| Display Group | | If you enter a Display Group here, the report will analyse the hours worked by all Persons belonging to that Display Group. |
| Function | | These options can be used to control the level of detail shown in the report. |
| | Overview | This option is a simple list, showing for each employee their initials, total numbers of actual and target hours, and a comparison between the two totals. |
| | Detailed | In addition to the information shown in the Overview, this option lists the Activities that were used to calculate the totals. |

| | |
|---------------------------|---|
| Per Type | This option is halfway between the Overview and the Detailed report. It shows subtotals of actual and target hours for each Activity Type. |
| Per Class | This is similar to the Per Type option, and shows subtotals of actual and target hours for each Activity Class. |
| Per Display Group | This is similar to the Per Type option, and shows subtotals of actual and target hours for each Display Group. |
| Include | Use these options to specify whether Done Activities, Activities that are not Done or both are to be included in the report. At least one option must be selected, otherwise no Activities will be included in the comparison. |
| Comparison | Four comparison methods are available. Remember that Calendar Activities only will be included in the calculations. Those marked as Don't Show and those with Activity Types belonging to Activity Classes marked Exclude from Time Statistics will not be included in any comparison method. |
| Invoiceable/Actual | This version compares the total time worked in the report period (calculated using Time Activities) with the proportion that is invoiceable (calculated using Time Activities with an Invoiceable Project specified on their 'Project' card). |
| Target/Actual | Actual time calculated using Time Activities is compared with target time calculated from the Target Time register. This option cannot be used in the Detailed version of the report. |
| Target/Profile | Planned time calculated using Profile Activities is compared with target time calculated from the Target Time register. This option cannot be used in the Detailed version of the report. |
| Profile/Actual | Actual time calculated using Time Activities is compared with planned time calculated using Profile Activities. |

| | |
|-----------------|--|
| Display | The last column of the report shows how the two figures compare. This comparison is calculated as follows— |
| % | The comparison is a percentage. |
| Quantity | The comparison is a number of hours. |

Item/Salesman Statistics

Please refer to the ‘Sales Ledger’ manual for full details of this report.

Letter List

This report is a duplicate of that produced by the ‘Letter List’ function on the Operations menu of the Customer Letter screen. For each Customer Letter record in the report, the letter text and a list of recipients will be shown. Both approved and unapproved Customer Letters are included.

A screenshot of a software dialog box titled "Specify Letter List". It has a blue title bar with standard window controls. Inside, there's a "Run" button in the top right. Below it are three input fields labeled "Letter No.", "Person:", and "Customer:". At the bottom, there's a "Media" section with five radio buttons: "Screen" (selected), "Printer", "File", "Clipboard", and "Print Dialog" (checked).

| | |
|-------------------|--|
| Letter No. | Enter the Serial Number of a Customer Letter record (or a range of Serial Numbers) to show the letter text and to list the recipients of that Letter or Letters. |
| Person | Paste Special Person register, System module Enter a Person’s initials to list all Customer Letters signed by that Person. |

| | | |
|-----------------|----------------------|--|
| Customer | Paste Special | Customers and Suppliers in Customer register |
| | | Enter a Customer Number to list all Customer Letters sent to that Customer. Note that only those Customer Letters with the Customer as the sole recipient will be shown. |

Personal Calendar

This report is a list of Calendar Activities and is the same as that produced by clicking the [Report] button in any Calendar view. Please refer to the section entitled ‘Personal Calendar Report’ on page 87 for full details.

Note that an entry must be made to at least one of the two fields below the Period, otherwise the report will be empty.

| | | |
|---------------|----------------------|--|
| Period | Paste Special | Reporting Periods setting, System module |
| | | Enter a reporting period: Activities whose Start Dates fall in this period will be shown in the report. To produce a report for a particular day, simply enter the date once. Hansa will then convert it to period format by inserting a colon and repeating the date. |
| Person | Paste Special | Person register, System module |
| | | Enter a Person’s initials to list the Activities recorded, scheduled or carried out by this Person. If you list the Activities of another Person, their Private Activities will not be included. |

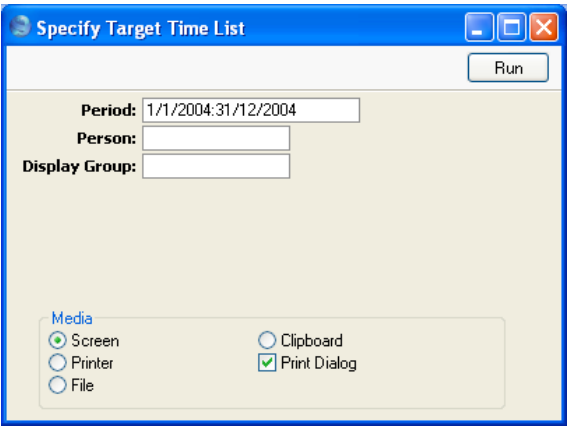
Display Group If you enter a Display Group here, the report will list the Activities recorded, scheduled or carried out by all Persons belonging to that Display Group.

Search for Contact Person

You can use this report to search for Contact Persons containing a certain word or phrase. Please refer to the description of the ‘Search’ function on the Operations menu of the ‘Contact Persons: Browse’ window on page 125 for details.

Target Time List

This report is a list of the Target Time records in the database.



| | | |
|----------------------|------------------------|---|
| Period | Paste Special | Reporting Periods setting, System module |
| | | Enter a reporting period: Target Time records whose Start Dates fall in this period will be shown in the report. |
| Person | Paste Special | Person register, System module |
| | Range Reporting | Alpha |
| | | Enter a Person’s initials to list the Target Time records for that Person. |
| Display Group | | Enter a Display Group: the report will list the Target Time records of all Persons belonging to that Display Group. |

Telephone List

This report is similar to the Contact List described above on page 170 in that it lists Contacts in the Contact Person register.

The screenshot shows a window titled "Specify Telephone List". It has a "Run" button in the top right. Below it are four text input fields labeled "Customer:", "Classification:", "Customer Category:", and "Job Description:". Under these fields are two groups of radio buttons. The first group is labeled "Function" and includes "Overview" (selected), "Overview with Work Details", and "Detailed". The second group is labeled "Media" and includes "Screen" (selected), "Printer", "File", "Clipboard", and "Print Dialog" (checked).

| | | |
|----------------|---------------|---|
| Customer | Paste Special | Customers and Suppliers in Customer register |
| | | Enter a Customer Number to list the Contact Persons that work for that Customer. |
| Classification | Paste Special | Customer Classifications setting, CRM module |
| | | Enter a Customer Classification to show Contact Persons with that Classification. If you enter a number of Classifications separated by commas, only those Contact Persons featuring all the Classifications listed will be shown. If you enter a number of Classifications separated by plus signs (+), all Contact Persons featuring at least one of the Classifications listed will be shown. If you enter a Classification preceded by an exclamation mark (!), all Contact Persons featuring any Classification except the one listed will be shown. |
| | | For example— |
| 1,2 | | Lists Contact Persons with Classifications 1 and 2 (including Contact Persons with Classifications 1, 2 and 3). |

| | |
|-------|---|
| 1+2 | Lists Contact Persons with Classifications 1 or 2. |
| !2 | Lists all Contact Persons except those with Classification 2. |
| 1,!2 | Lists Contact Persons with Classification 1 but excludes those with Classification 2 (i.e. Contact Persons with Classifications 1 and 2 are not shown). Note the comma before the exclamation mark in this example. |
| !1,!2 | Lists all Contact Persons except those with Classification 1 or 2 or both. Again, note the comma. |

Customer Category

Paste Special

Customer Categories setting,
Sales Ledger

Enter a Customer Category to show Contact Persons belonging to Customers with that Category.

Job Description

Paste Special

Job Descriptions setting, CRM
module

Enter a Job Description to list Contact Persons with that Job Description.

Function

These options control the amount of information shown in the report.

Overview

This option shows the name of each Contact Person, together with contact details: telephone, mobile and alt (home telephone) numbers.

Overview with Work Details

In addition to the information shown in the Overview, this option prints the Job Description, Department and Classification of each Contact Person.

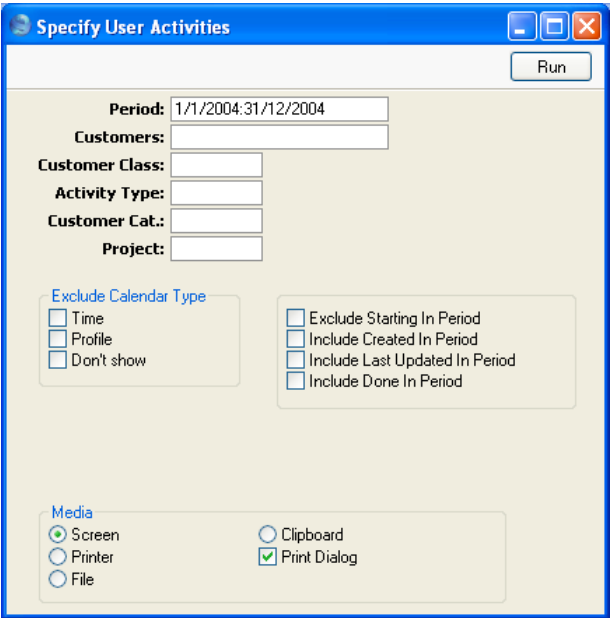
Detailed

In addition to the information shown in the Overview with Work Details, this option also shows the full address for each Contact together with Customer Code, Title, fax number and Comment.

User Activities

This report is a list of the current user’s Activities, including Activities of all Task Types. These are Activities in which the initials of the current user are included in the Persons or Cc fields. For each Activity, the report shows the Activity Number, Start Date, Activity Type, Calendar Type (Time, Profile or Don’t Show) and Text.

When printed to screen, this report has Hansa’s Drill-down feature. Click on any Activity Number to open an individual Activity record.

A screenshot of a software dialog box titled "Specify User Activities". It features a "Run" button in the top right corner. Below the title bar, there are several input fields: "Period:" with the value "1/1/2004:31/12/2004", "Customers:", "Customer Class:", "Activity Type:", "Customer Cat.:", and "Project:". Below these fields are two groups of checkboxes. The first group, labeled "Exclude Calendar Type", includes "Time", "Profile", and "Don't show". The second group includes "Exclude Starting In Period", "Include Created In Period", "Include Last Updated In Period", and "Include Done In Period". At the bottom, there is a "Media" section with radio buttons for "Screen" (selected), "Printer", and "File", and checkboxes for "Clipboard" and "Print Dialog" (checked).

Period

Paste Special

Reporting Periods setting,
System module

Enter a reporting period: Activities that are not Done whose Start Dates fall in this period will be shown in the report. Using the options described at the end of this section, you can also choose to include in the report Activities whose Creation Dates, Last Changed Dates and/or End Dates fall in this period.

| | | |
|-----------------------|---|--|
| Customers | Paste Special | Customers and Suppliers in Customer register |
| | Range Reporting | Alpha |
| | Enter a Customer Number or a range of Numbers to list Activities recorded or scheduled for that Customer (or for the range of Customers). | |
| Customer Class | Paste Special | Customer Classifications setting, CRM module |
| | Enter a Classification Code to list Activities featuring Customers with a particular Classification. If you enter a number of Classifications separated by commas, Activities will only be listed for those Customers featuring all the Classifications that you have entered. If you enter a number of Classifications separated by plus signs (+), Activities will be listed for all Customers featuring at least one of the Classifications listed. If you enter a Classification preceded by an exclamation mark (!), Activities will be listed for all Customers featuring any Classification except the one listed. | |
| | For example— | |
| 1,2 | Lists Activities for Customers with Classifications 1 and 2 (including those for Customers with Classifications 1, 2 and 3). | |
| 1+2 | Lists Activities for Customers with Classifications 1 or 2. | |
| !2 | Lists Activities for all Customers except those with Classification 2. | |
| 1,!2 | Lists Activities for Customers with Classification 1 but not those for Customers with Classification 2 (i.e. those for Customers with Classifications 1 and 2 are not shown). Note the comma before the exclamation mark in this example. | |
| !1,!2 | Lists Activities for all Customers except those with Classification 1 or 2 or both. Again, note the comma. | |

| | | |
|---------------------------------------|----------------------|---|
| Customer Cat. | Paste Special | Customer Categories setting, Sales Ledger |
| | | Enter a Category Code to list Activities featuring Customers in a particular Category. |
| Project | Paste Special | Project register, Job Costing module |
| | | Enter a Project Number to list the Activities relating to that Project. |
| Exclude Calendar Type | | Use these options to exclude Activities of various kinds from the report. |
| Exclude Starting in Period | | Check this box if you want Activities whose Start Dates fall in the report period to be excluded from the report. If this box is checked, you must check at least one of the three boxes below, otherwise the report will be empty. |
| Include Created in Period | | Check this box if you want Activities created during the report period to be included in the report. |
| Include Last Updated in Period | | Check this box if you want Activities last updated during the report period to be included in the report. |
| Include Done in Period | | Check this box if you want Activities whose End Dates fall in the report period to be included in the report. If this box is checked, both Activities marked as Done and those not marked as Done will be included in the report. Otherwise only Activities that are not Done will be shown. |

Who has bought/not bought

This report lists the Customers that have bought or not bought a specific Item, or Customers with Contracts containing or not containing a specific Item.

When printed to screen, this report has Hansa’s Drill-down feature. Click on any Customer Number to open an individual Customer record.

Specify Who has bought/not bought

Run

Period:1/1/2004:31/12/2004

Category:

Salesman:

Classification:

Item:

Register

☒Invoices

☐Contracts

Function

☒Has bought

☐Has not bought

☐Exclude period selection

Media

☒Screen

☐Printer

☐File

☐Clipboard

☒Print Dialog

| | | |
|----------|---------------|--|
| Period | Paste Special | Reporting Periods setting, System module |
| | | Enter a reporting period: Customers that have bought or not bought the specified Item during this period will be listed in the report. If you want the report to ignore this period, check the Exclude Period Selection box below. The period is always ignored if you are reporting on Contracts. |
| Category | Paste Special | Customer Categories setting, Sales Ledger |
| | | Enter a Customer Category here if you would like the report to list the Customers belonging to that Category that have bought or not bought the specified Item. |
| Salesman | Paste Special | Person register, System module |
| | | Enter a Person’s initials to list the Customers with a particular Salesman that have bought or not bought the specified Item. |

| Classification | Paste Special | Customer Classifications setting, CRM module |
|----------------|---------------|---|
| | | <p>Enter a Customer Classification here if you would like the report to list the Customers with that Classification that have bought or not bought the specified Item. If you enter a number of Classifications separated by commas, the report will only list those Customers with all the Classifications that you have entered. If you enter a number of Classifications separated by plus signs (+), all Customers featuring at least one of the Classifications listed will be shown. If you enter a Classification preceded by an exclamation mark (!), all Customers featuring any Classification except the one listed will be shown.</p> <p>For example—</p> |
| 1,2 | | Lists Customers with Classifications 1 and 2 (including Customers with Classifications 1, 2 and 3). |
| 1+2 | | Lists Customers with Classifications 1 or 2. |
| !2 | | Lists all Customers except those with Classification 2. |
| 1,!2 | | Lists Customers with Classification 1 but excludes those with Classification 2 (i.e. Customers with Classifications 1 and 2 are not shown). Note the comma before the exclamation mark in this example. |
| !1,!2 | | Lists all Customers except those with Classification 1 or 2 or both. Again, note the comma. |
| Item | Paste Special | Item register |
| | | <p>Specify here the Item that is to be the subject of the report: it will list the Customers that have bought or not bought this Item. The report will be empty if you do not specify an Item.</p> |
| Register | | Choose which version of the report is to be produced. |
| Invoices | | The report will search approved Invoices to produce a list of Customers that have bought or not bought the specified Item. |

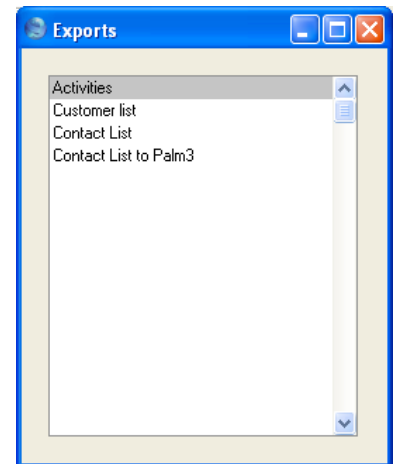
| | |
|---------------------------------|--|
| Contracts | <p>The report will search the Contract register to produce a list of Customers that have Contracts containing or not containing the specified Item. Any period specified above will be ignored.</p> <p>If you choose the Has Not Bought option (below), Customers with no Contracts at all will not be listed.</p> |
| Function | <p>Choose whether the report is to list Customers that have bought or not bought the specified Item.</p> |
| Exclude Period Selection | <p>Check this box if you want the report to ignore the period specified above (i.e. you want to list Customers that have bought or not bought the specified Item at any time).</p> |

Exports

Introduction

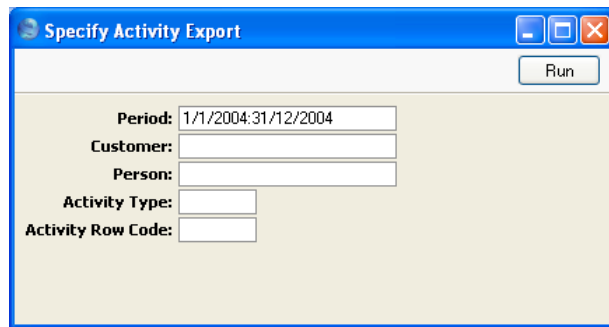
The 'Exports' function provides for the exporting of certain information to tab-delimited text files from where it can be incorporated in word processing programs for mailmerge, in spreadsheets for further statistical analysis or in page make-up programs for incorporation in publicity material or published reports. Alternatively, it can be imported into other Hansa databases or Companies using the 'Automatic' and 'Automatic, manual file search' import functions in the System module. The function is selected using the 'Exports' item on the File menu or by clicking the [Exports] button in the Master Control panel.

On selecting the function, the window illustrated below appears. This lists the four Exports that can be produced from the CRM module. Double-click one of the items in the list: a specification window will then appear, where you can decide the contents of the exported text file. Click [Run]: the specification window will be closed and you will then be asked to name the file and to determine where it is to be saved.



Activities

This command exports data from one or more Activities.



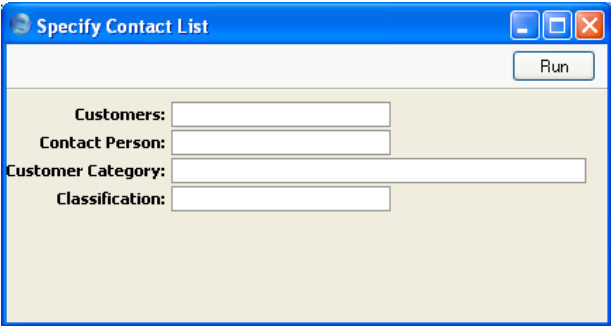
The image shows a Windows-style dialog box titled "Specify Activity Export". It has a blue title bar with standard window controls (minimize, maximize, close) and a "Run" button in the top right corner. The main area of the dialog is light beige and contains five labeled input fields stacked vertically: "Period:" with the text "1/1/2004:31/12/2004", "Customer:", "Person:", "Activity Type:", and "Activity Row Code:". Each label is in bold black text, and each input field is a white rectangular box.

| | | |
|--------------------------|----------------------|---|
| Period | Paste Special | Reporting Periods setting, System module |
| | | Enter the start and end date of the reporting period. |
| Customer | Paste Special | Customers and Suppliers in Customer register |
| | | Limit the selection to Activities recorded or scheduled for a single Customer. |
| Person | Paste Special | Person register, System module |
| | | Enter a Person's initials to limit the selection to Activities recorded, scheduled or carried out by this person. |
| Activity Type | Paste Special | Activity Types setting, CRM module |
| | | Enter an Activity Type to limit the export to Activities of that Type. |
| Activity Row Code | Paste Special | Text Types setting, CRM module |
| | | Enter a Text Type to limit the export to Activities featuring that Type. |

Press [Run] to start the export. When it has finished, close the 'Export' window using the close box.

Contact List

This function exports information from the Contact Person register.



| | | |
|-------------------|-----------------|--|
| Customers | Paste Special | Customers and Suppliers in Customer register |
| | Range Reporting | Alpha Enter a Customer Number to export the Contact Persons that work for that Customer. |
| Contact Person | Paste Special | Contact Person register, CRM module |
| | | Enter the name of a Contact Person to export their details only. |
| Customer Category | | |
| | Paste Special | Customer Categories setting, Sales Ledger Enter a Customer Category to export Contact Persons belonging to Customers with that Category. |
| Classification | Paste Special | Customer Classifications setting, CRM module |
| | | Enter a Classification to export Contact Persons with that Classification. If you enter a number of Classifications separated by commas, only those Contact Persons featuring all the Classifications listed will be exported. If you enter a number of Classifications separated by plus signs (+), all Contact Persons featuring at least one of the Classifications listed will be exported. If you enter a Classification preceded by an exclamation |

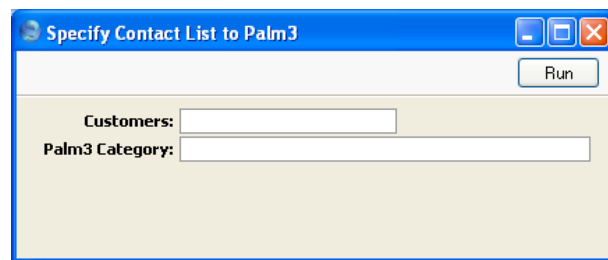
mark (!), all Contact Persons featuring any Classification except the one listed will be exported.

For example—

| | |
|-------|---|
| 1,2 | Exports Contact Persons with Classifications 1 and 2 (including Contact Persons with Classifications 1, 2 and 3). |
| 1+2 | Exports Contact Persons with Classifications 1 or 2. |
| !2 | Exports all Contact Persons except those with Classification 2. |
| 1,!2 | Exports Contact Persons with Classification 1 but not those with Classification 2 (i.e. Contact Persons with Classifications 1 and 2 are not exported). Note the comma before the exclamation mark in this example. |
| !1,!2 | Exports all Contact Persons except those with Classification 1 or 2 or both. Again, note the comma. |

Contact List to Palm3

This function exports information from the Contact Person register in the correct format for importing into a Palm3.



Customers

Paste Special

Customers and Suppliers in
Customer register

Range Reporting

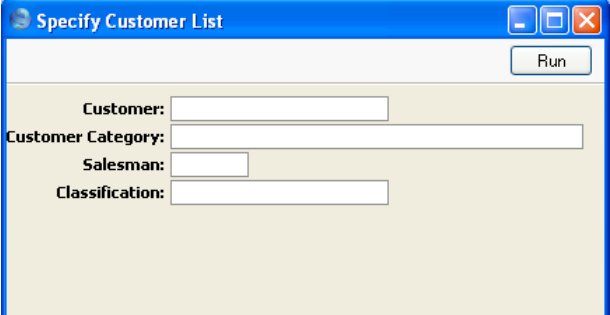
Alpha

Enter a Customer Number to export the Contact Persons that work for that Customer. An entry must be made to this field otherwise the export file will be empty.

Palm3 Category Specify here the Category on your Palm3 into which you want the information to be imported. This is included in the export file to ensure it will be imported into the right place.

Customer List

Use this function to export Customers from the Customer register. If you need to export Suppliers from the Customer register, use the Base Register Export in the System module.



| | | |
|--------------------------|------------------------|--|
| Customer | Paste Special | Customers in Customer register |
| | Range Reporting | Alpha Choose the records to be exported by entering a Customer Number or a range of Numbers. |
| Customer Category | | |
| | Paste Special | Customer Categories setting, Sales Ledger Enter a Category Code to export Customers in a particular Category. |
| Salesman | Paste Special | Person register, System module Enter a Person's initials to export Customers with this Person as their Salesman. |
| | | |
| Classification | Paste Special | Customer Classifications setting, CRM module Enter a Classification Code to export Customers with a particular Classification. If you enter a number of Classifications separated by commas, only those |
| | | |

Customers featuring all the Classifications that you have entered will be exported. If you enter a number of Classifications separated by plus signs (+), all Customers featuring at least one of the Classifications listed will be exported. If you enter a Classification preceded by an exclamation mark (!), all Customers featuring any Classification except the one listed will be exported.

For example—

| | |
|-------|---|
| 1,2 | Exports Customers with Classifications 1 and 2 (including Customers with Classifications 1, 2 and 3). |
| 1+2 | Exports Customers with Classifications 1 or 2. |
| !2 | Exports all Customers except those with Classification 2. |
| 1,!2 | Exports Customers with Classification 1 but not those with Classification 2 (i.e. Customers with Classifications 1 and 2 are not exported). Note the comma before the exclamation mark in this example. |
| !1,!2 | Exports all Customers except those with Classification 1 or 2 or both. Again, note the comma. |

HansaWorld Enterprise

CRM

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