FirstContact

Customer Relationship Manager for Macintosh and Windows

© 2001 Hansa Business Solutions, London, England
All rights reserved
3.8 2001-10-05

Preface

FirstContact is a powerful contact management and internal mail system for Windows and Macintosh computers. The programs are practically identical in the two environments, and they are designed to make administration and accounting as easy and fast as possible.

In the specific areas where the Macintosh and Windows versions differ, this manual describes both versions, but in all other cases illustrations are taken from the Windows version.

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

How this manual is organised

Introduction	Installing FirstContact, the basic ideas
Work Area	Basic elements of FirstContact: modules, registers, windows, menus, functions, buttons
Customers	Customers, customer categories and reports
Items	Products and services, pricing
Quotations	Sending quotations, call backs, reports
Mail	Internal mail, external mail (email), conferences, chat.
Activities, To Do and Calendar	Contact and time management. Activities, the to do list and the calendar: registering and reviewing appointments in daily or monthly diary or calendar format. Contact Persons. Customer letters and mailshots. Target time.
System Module	Settings and parameters. System-wide usage
Value Packs	Advanced Pricing, Currencies and Languages, Fax, Local Mailboxes

Contents

Preface ..... **II**

How this manual is organised ..... **III**

Chapter 1: Introduction and Installation **18**

Structure of FirstContact **18**

Preparing for Installation **20**

Efficient Management 20
Planning and Setting up 21

Installation **22**

System Requirements 22
All Platforms 22
Windows 22
Macintosh 23

Installation 23
Windows 23
Macintosh 26
Multi-user 26

After Installation 27

Starting FirstContact **30**

Companies and Databases 30

Loading an Existing Database and Company 31
Single-user 31
Multi-user 31

Creating a New Database 32
Creating a New Company 32
Importing from a Back-up 35
The Work Area 36
Settings 36
Modules, Users and Companies 40
Adding New Companies 40
The Database Key 42
If the “DBDef.txt” file is missing 44

Creating a New Database - Multi-user 45
Setting up the Server module 45
The Program Mode Register 46
Logging on from a Client 48

Setting up an FTP Server 50
Shutting Down 53
Single-user 53
Multi-user 53
Backing Up 56
Automatic Timed Back-ups 58
Backing Up Using Specialist Back-up Software 60
Restoring from a Back-up 61
Upgrading from Previous Versions of FirstContact 65
Chapter 2: Work Area 68
Tool Palettes 69
The Button Bar 69
The Book 69
The Buttons 70
The Printer 70
The Company Box 71
The Master Control Panel 71
Disk Space 74
Menus and Sub-menus 75
The Menu Bar 75
File Menu 75
Company 76
Master Control 76
Exports 76
Imports 77
Maintenance 78
Reports 78
Documents 80
Settings 82
Page Setup 83
Print 84
Print Queue 84
Quit 85
Edit Menu 85
Undo 85
Cut 85
Copy 86
Paste 86
Clear 86
Select All 86
Select Row 86

Record Menu 87
Next 87
Previous 88
OK 88
Cancel 88
New 88
Copy 88
Delete 89
Invalidate 89
Attachments 90
History 90
The Registers 91
Modules Menu 92
Special Menu 93
Window Menu 93
About FirstContact 94
Windows 95
Browse Window 95
Record Windows 98
The Special Menu 99
Paste Special 99
Drag and Drop 101
The Book 101
Attachments 101
Report Window 102
Printouts 103
Searching in Reports 103
Recalculating reports 103
Drill-down 104
List Window 105
Specification Window 106
File Dialogue Window 107
Working with Records 108
Current Record 108
New Record 108
Copy Record 108
Delete Record 109

Attachments 109
Attaching Files to Records 110
Reading Files 111
Attaching Notes or Comments to Records 111
Reading and Changing Notes 112
Changing the Names of Attachments 112
Attaching Records to Other Records 112
Viewing Attached Records 113
Removing Attachments 113
Attaching Records to Mails 113

Reports 115

Export to other applications 115

Keyboard Shortcuts 116

Chapter 3: Customers 118

Settings 118

Classification Types 118

Customer Categories 119

Customer Classifications 120

Customer Status Report 121

Delivery Modes 122

Delivery Terms 123

Payment Terms 123

The Customer Register 125

Entering a Customer 126
Header 126
Card 1 128
Card 2 129
Card 3 130
Card 4 133

Editing a Customer 133

Deleting a Customer 134

Special Menu 134
Customer Status 134
Change Password 135
New Contact 136
New Activity 137

Documents 139
Customer Labels 140
Reports 143
Customer List 143
Chapter 4: Items and Pricing 148
Settings 148
Item Groups 148
Deleting an Item Group 149
Units 150
The Item Register 151
Entering an Item 151
Header 152
Card 1 153
Card 2 154
Card 3 156
Editing an Item 156
Deleting an Item 157
Prices 158
Introduction 158
The Base Price 158
Structure of Price Lists 158
Price Lists 159
The Prices Setting 160
Reports 162
Item List 162
Price List 163
Chapter 5: Quotations 168
Settings 168
Number Series - Quotations 168
Quotation Classes 169
Quotation Mail 170

The Quotation Register 172
Entering a Quotation 173
Header 174
Card 1 175
Card 2 177
Card 3 180
Card 4 181
Card 5 182
Inspecting and Changing Quotations 182
Printing Quotations 183
Special Menu 184
Subtotal 184
Create Activity 184
Create Mail 186
Maintenance 188
Update Quotations 188
Documents 190
Quotations 191
Reports 192
Quotation Journal 193
Quotation Stock 195
Exports 197
Quotation Rows 197
Chapter 6: Mail 200
Setting up the FirstContact Mail System 200
The Server 200
The Technics Module 202
Persons 204
Mail Access Groups 205
Mailboxes 206
Conferences 209
Miscellaneous Settings 213
External Mail 215
Incoming External Mail (POP3) 216
Outgoing External Mail (SMTP) 224
Activating the External Gateway 225

Backing up the Gateway 225
External Mail in a Single-User Installation 226
Sending and Receiving Mail 228
Sending Mail....231
Mail and Conferences....233
Replying to and Amending Mail....236
Marking Mail as Not Read....238
Attachments 238
Printing Mail....239
Saving Mail....240
Deleting Mail....241
Chat....242
Special Menu....243
Invite 243
Who is in this chat?....244
Beep Others....244
Presentations....245
Entering a Presentation 245
Reading Presentations 245
Maintenance 246
Clean Up Mail Registers 246
Removing Mail Automatically 248
Emptying the “Tmp” Folder 248
Reports 249
E-mail Aliases....249
Mail History....250
Chapter 7: Activities, To Do and Calendar 252
Examples 252
Contact Management 252
Time Management....258
Note on Terminology 264
Settings 266
Activity Classes....266
Activity Consequences 268

Activity Types 270
Activity Types, Subsystems 271
Job Descriptions 272
Number Series - Customer Letters 272
Standard Texts 273
Target Time 274
Text Types 274
Activities 275
Viewing Activities 275
Entering an Activity 275
Header 277
Card 1 281
Card 2 283
Card 3 284
Creating Activities from other Registers 284
Completing an Activity 286
The To Do List 288
The Calendar 290
Opening the Calendar 290
The Four Calendar Views 291
The Six-monthly View 291
The Monthly View 292
The Weekly View 293
The Daily View 294
The [New Activity] button 295
The [Report] button 295
If there are no Week Numbers 295
The Personal Calendar Report 296
The Target Time Setting 298
Entering Target Time Records 298
Using Target Time Information 301
The Customer Letter Register 304
Entering a Customer Letter 304
Header 305
Card 1 306
Card 2 308
Card 3 309

Card 4....310
Card 5....310
Inspecting and Approving Customer Letters....311
Printing Customer Letters....312
Special Menu....320
Letter List....320
Send email....320
Create Activity....320
The Contact Person Register....322
Header....323
Card 1....324
Card 2....324
Documents....326
Activities....327
Customer Letter....328
Reports....330
Activities, Customers....330
Activity Type List....332
Contact List....333
Customers with no Activities....334
Employee Planned Time....335
Letter List....338
Telephone List....339
Exports....341
Activities....341
Contact List to Palm3....342
Chapter 8: The System Module....346
Settings....346
Active Users....346
Company Info....347
Card 2....347
Cards 3 and 4....348
Conversions - Master, Conversions - Activity Types....349
Conversions - Master, Conversions - Customers....351
Enabler....351

Printers 352
Defining when Printers are to be used 354
Setting up a Print Server 355
Reporting Periods 359
Round Off 360
System Usage 361
Value Packs 362
VAT Codes 362
Weeks 363
The Company Register 364
Entering Companies 364
Working with Companies 365
The Person Register 366
Changing Passwords 369
The Access Group Register 371
System Administrator 375
The Form Register 376
Editing Objects 377
Text Objects 377
Lines and Frames 378
Fields 378
Pictures 379
Special Menu 380
Properties 380
PC Printer 381
Copies 381
Send to Back 381
View All, First Only, Middle Only, Last Only, Single Page Only 381
Single- and Multi-Page Forms 382
Printing Forms 383
Related Items 384
The Style Register 385
Documents 387
Reports 388
Activities, Persons 389
Company Info 390

Mail History....390
Person List....391
Imports....392
Automatic....392
Automatic, manual file search....393
Exports....395
Company Text Backup, Database Text Backup....396
Restoring from a Back-up....398
Client Text Backup....401
System Data....401
Base Registers....403
Item Base Registers....403
Raw Data....404
Run Timed Backup....404
Chapter 9: Value Packs 406
Advanced Pricing....408
The Base Price....408
Structure of Price Lists....408
Price Formulae....410
Price Lists....411
The Prices Setting....414
The Quantity Dependent Prices Setting....414
The 'Calculate Price Lists' function....415
Entering Price Records Manually....417
Examples....418
Creating Price Lists....418
Creating a Price List in another Currency....420
Prices in Currency....421
Quantity Discounts....424
Quantity Dependent Discounts....425
Discount Matrices....426
Currencies and Languages....430
Currencies....430
Customers and Quotations....432

Languages 433
Languages 434
Translations 434
Printing Quotations in Different Languages 436
Fax 438
Local Mailbox 442
Configuring a Local Mailbox System 442
The Server 442
The Clients 443
Using Local Mailboxes 447
Index 452

FirstContact Introduction and Installation

Chapter 1: Introduction and Installation

FirstContact is a powerful, simple and efficient tool for keeping track of contacts with Customers, organising mailshots and for planning activities of all kinds. The program 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 FirstContact, 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 To Do List. 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.

FirstContact contains full internal mail, email and conferencing facilities. These features, together with the External Gateway and web, FTP and fax servers, mean that users can be online from anywhere at anytime. This means that employees can always be in touch with each other.

In addition, FirstContact can be used to send Quotations to Customers. The Item register records the products that you sell, and there is a Price List feature to ensure the correct prices are quoted to each Customer. These Quotations are integrated with Activities: a Make Contact date can be recorded for each Quotation and an Activity created to remind you to call on that date. There is a great deal of flexibility, and different users will adapt it to their own requirements.

In this introductory chapter, we will cover the steps you need to follow to get started with FirstContact. Topics covered include installation (both single- and multi-user) and the creation of a new database. Subsequent chapters cover FirstContact's working environment, its structure and the way data is handled, and beginning work. The remaining chapters in this manual describe the Customer and Item registers which are used throughout the system, the Quotation register, Mail, Activities, Calendar and To Do and finally the System module, where preferences and look-up information are stored.

Structure of FirstContact

FirstContact consists of two main modules: the Contact module and the System module. Most of your time will be spent in the Contact module, working with Customers, Items, Quotations, Activities and Mail. The System module is used for housekeeping tasks such as backing up, licencing amd the administration of users, including the allocation of access rights. Both modules contain a number of registers, or files, in which all information of a

particular type is stored. For example, all information about Customers is stored in a Customer register, all information about Items is stored in an Item register and so on.

In addition to the registers, there are several smaller files known as 'Settings' in each module. The difference between a setting and a register lies in the frequency and nature of use. The information with which you will be working daily, such as Customers, Items and Quotations, tends to be stored in registers, while information stored in settings tends to be used in 'look-up' tables or used to determine the manner in which a particular function operates.

Preparing for Installation

FirstContact is designed with a modern graphical user interface - for Windows and for Macintosh. It uses many different “windows” on the screen, one for each task. The basic idea is to create a working environment that as closely as possible relates to the way you handle papers, files and documents on your desk.

Contact management tasks normally require that you work with several documents at the same time. This fact is reflected in the design of FirstContact, and documents and reports are handled in a slightly different manner to what you may be used to in word processors or spreadsheet programs. FirstContact therefore contains a number of features that you may not be familiar with.

If this is the first program you will be using in a Windows or Macintosh environment, you should first of all take the time to learn as much as possible about the computer and how to use it. And you must of course be sure that the correct version of the computer’s operating system is installed. Talk to your computer dealer or consultant if you are uncertain.

Even if you are an experienced computer user, you should read this Introduction, because FirstContact contains a large number of features designed to facilitate your work and to make it faster. If you are the ‘I-never-read-manuals’ type of person, you will of course be able to use FirstContact anyway - it is very simple. But there are some not so obvious shortcuts that can save you a lot of time. They are all in the manual.

Efficient Management

FirstContact is easy to use. By following the instructions in the installation section of this manual, you can set up your contact management and quotation system in a very short time. You will quickly be able to get the benefits from an efficient system.

The basic idea with automatic administration is to make the computer do most of the routine work. In the beginning it may seem a lot of work to enter all the necessary information about Items and Customers, but that is really all the preparation you have to do. It is not necessary to use all the many features of FirstContact. Remember, however, that the more basic information you can enter into the various files and registers, the more the program will be able to assist you in your work.

Planning and Setting up

If this is the first time that you will be using a computerised contact management system, or if you are changing from another system, why not take a good look at the overall operations? Maybe you can do things in your present operation more efficiently.

A good idea is to sit down with pen and paper for a while, and go through your Items (products and services you buy and sell), ItemGroups, Customer Categories, and Terms, etc. If some of the concepts of FirstContact are new to you, it is always a good idea to think first.

The setting up of a FirstContact system in your business requires some planning and forethought. You will have to make a number of decisions about number series for Quotations, statistical classifications and so on. FirstContact allows a great deal of flexibility, and you can create almost any work environment you want. But remember that you are in charge. I

If you will be using FirstContact as a multi-user system, its installation, as is the case for any advanced multi-user system, will mean a great change in the day-to-day operations of the business. Before you install, you should therefore consider very carefully how you want the business to work, now and in the future.

- What tasks are to be performed, and just how do you want them done?
- Who should enter e.g. Quotations, and how?
- What business documentation and reports are needed, and how should you identify and file the documents?

FirstContact gives you great flexibility, but it is important that you know what you want beforehand. We strongly advise against installing a multi-user installation without the assistance of a qualified FirstContact consultant. Please contact your FirstContact representative for advice and training.

Remember that once the installation process has been completed, FirstContact does require some maintenance. At the very least, you should establish a regular routine for backing up. A contact management system is very different from a word processor, which handles individual documents. FirstContact uses a database in which all your data about Customers, Items, Quotations etc. is stored in a single file. If you lose that file, you have lost not just a single document, but all your customer information.

Installation

The installation of a FirstContact financial system is technically simple. If you are used to computers and have some experience of installing software, you will find the installation of FirstContact very straightforward.

System Requirements

All Platforms

FirstContact requires at least 15 Mb of free hard disk space at the time of installation, but more will be required as the database grows with regular use.

In multi-user systems, you must reserve at least one computer in the network as your FirstContact server. All servers should be dedicated (i.e. they should not be used for any other purpose such as print spooling or running separate applications). FirstContact communicates using TCP/IP: this must be installed on all servers and clients. FirstContact is suitable for use on mixed (Macintosh and PC) networks, provided all machines have TCP/IP installed.

If you will be connecting to your FirstContact server by modem, the minimum recommended modem speed on the server is 64 kbps. If there will be more than 10 users, or if the Attachments feature will be used to attach files to records or mails, at least 128 kbps is preferable. The Attachments feature is described in Chapter 2 of this manual.

10 Mb/s Ethernet Cards are sufficient for the clients and for the server in small networks. In large networks with more simultaneous connections, a 100 Mb/s card is recommended for the server.

Windows

Hardware

For a single-user installation, you will need a Windows computer with a hard disk drive and a printer. Minimum memory requirements are 64 Mb (Windows 95/98/2000) or 128 Mb (Windows NT; up to 192 Mb recommended).

In multi-user FirstContact systems, the server computer should be selected with the transaction load of the installation in mind. For a Windows NT installation, a minimum server is a fast 486 with at least 128 Mb memory.

Software

FirstContact single-user needs Windows NT or Windows 95/98/2000. Windows 3.x cannot be used. A Client/Server installation for a maximum of four clients can be run using a server running Windows 95 with TCP/IP. For installations with more than four clients, Windows NT is recommended as the operating system for the server. FirstContact can be installed in file-sharing networks (Novell) but the FirstContact installation will not use any of the file-sharing facilities. TCP/IP and Winsock2 (WS2_32.DLL) must be installed on the server and all clients. Winsock2 is installed as standard in Windows 98, NT and 2000, but not in Windows 95. Windows 95 users can obtain it from http://www.microsoft.com/windows95/downloads/.

Macintosh

Hardware

You will need a Macintosh with a hard disk drive, a printer and at least 32 Mb of internal memory, so that a minimum of 15 Mb can be allocated to FirstContact (18 Mb recommended). 68K Macintoshes cannot be used: all machines must be PowerPCs.

In multi-user FirstContact systems, the server should have at least 18 Mb of memory allocated to the FirstContact server software.

Software

FirstContact requires Macintosh System 8.6 (or later). Multi-user versions of FirstContact use TCP/IP and Open Transport: these must be installed on the server and on all clients.

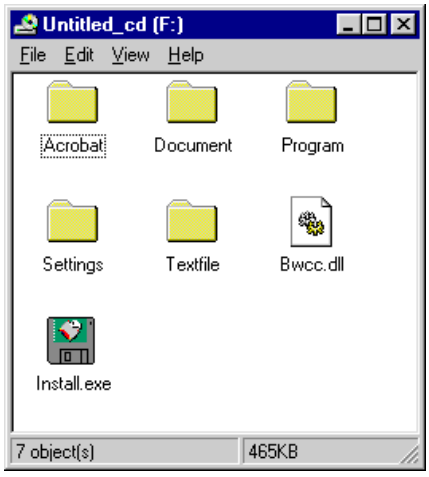
Installation

Windows

To install FirstContact from the CD-ROM, follow these steps—

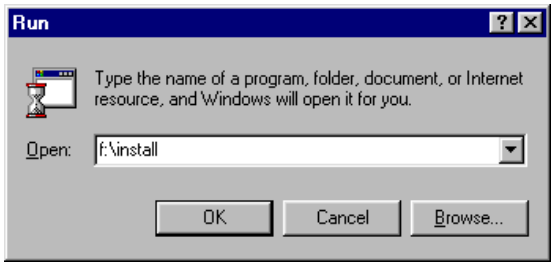
1. Start Windows.
2. Insert the FirstContact CD-ROM into your CD drive.
3. If you have Windows NT, go to the Main window and open the File Manager by double-clicking. Select the CD drive (usually F:) by clicking the appropriate button in the top left-hand corner of the window. If you have Windows 95/98/2000, go into the Explorer or “My Computer” window and double-click the icon representing your CD-ROM drive.

The following window opens—



Double-click the “install.exe” file.

Alternatively, select the ‘Run’ command from the Start menu (Windows 95/98/2000) or from the File menu in the File Manager (Windows NT). The illustration below is from Windows 98.



In the Command line field, type “F:\install” (where “F” represents your CD drive) and press [OK].

4. The following window will be opened—

Click the flag representing your country to progress to the next window. From here, follow the instructions on screen to install FirstContact.

FirstContact needs at least 15 Mb of hard disk space: the installation will require 8.5 Mb, and a data file will be created as soon as FirstContact is run for the first time.

By default, FirstContact will be installed in a directory named “1Contact” in the root directory. The installer will offer you the opportunity to choose another destination if necessary.

Under Windows NT, the installation process will create a Program Group and some icons in the Windows Program Manager. A message will tell you that the installation was successful. If anything went wrong, you will be informed.

Under Windows 95/98/2000, the FirstContact application will be installed in a new FirstContact directory. The installer will also create a shortcut, allowing you to launch FirstContact from the Start menu.

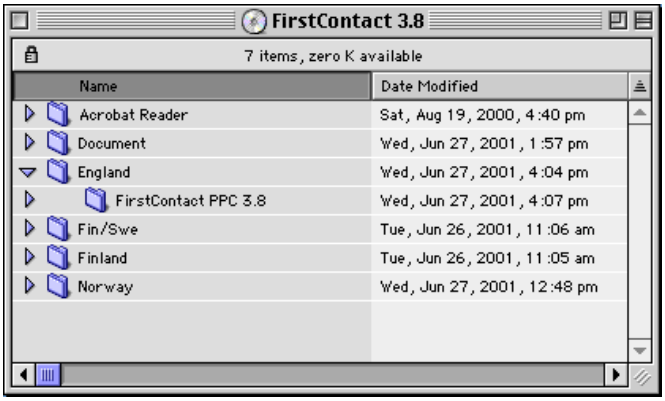
The installer will also install some other files containing standard settings, document definitions and a sample database. These are described in the section entitled ‘After Installation’ below.

Macintosh

To install FirstContact from the CD-ROM, follow these steps—

1. Insert the CD-ROM into your CD drive and double-click its icon. The following window appears—

2. Open the appropriate folder for your country—



3. Copy the “FirstContact PPC 3.8” folder to your hard disk. You will need about 15 Mb for the copied files and for the data file which will be created the first time you launch FirstContact.

Multi-user

For a multi-user installation you need to proceed as follows—

1. Create a network including all the computers and other equipment you are going to use. Use the Windows or Macintosh System installation tools to install TCP/IP on each machine. Ensure all Windows machines

have Winsock 2 (WS2_32.DLL) installed and that all Macintoshes have Open Transport installed.

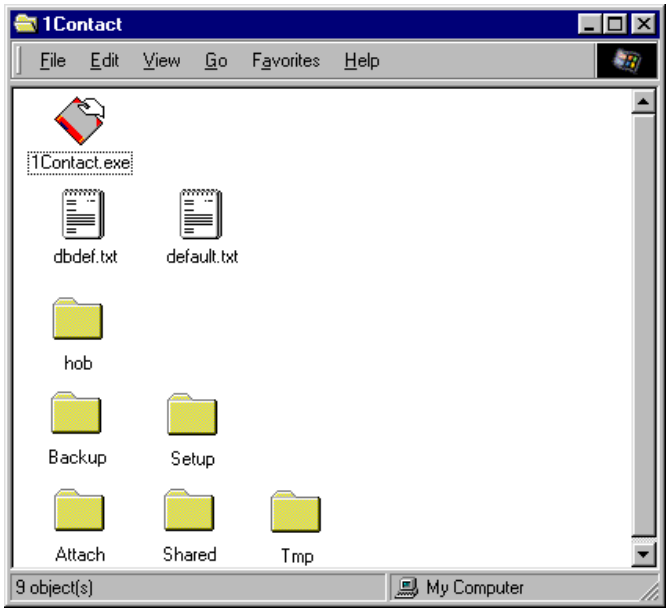
2. Select one computer as the server computer.

3. Install FirstContact on the server computer, as described in the single-user section above.

4. Install FirstContact on each of the client machines, again as described above.

After Installation

The FirstContact directory or folder contains a number of files—



Shown is the Windows 98 folder: its appearance on your computer and the number of files and folders may differ slightly according to the type of machine you are using, its operating system and certain other settings. In the illustration, for example, all file extensions are shown. Some or all of the following files should be present—

1. The FirstContact application, consisting of the program file “1Contact.exe” or “1Contact32” (Windows) or “First Contact” (Macintosh). In some circumstances, this file may be named “Server32”.

2. The “Hob” folder, containing language and other files. This must be present in the same folder or directory as the FirstContact application. In some installations, there may be a “Hal” folder as well, used for the same purpose.

3. The file “DBDef.txt”, which is used by FirstContact to import some basic settings data whenever a new database is created. This file must be present in the same directory as the program when a new database is created.

4. The file “Default.txt”, which is used by FirstContact to import some basic settings data whenever a new Company is created. This file must be present in the same directory as the program when a new Company is created. Companies and databases are described in the next section of this chapter.

5. A back-up of an example database for training purposes (named “2001FCdemo38.txt” or “FCdemo.txt”). To use the example database, follow the instructions in the section entitled ‘Restoring from a Back-up’ later in this chapter covering the creation of a new database and the importing of a back-up file. In some installations, this file will be placed in a folder named “Setup”.

6. An “Attach” folder, which must be present if you want to attach files to records. Such Attachments are fully described in the next chapter, ‘FirstContact’s Work Area’. In multi-user installations, this folder should be on the server machine.

7. A “Backup” folder to be used for storing daily back-up files.

The following folders should be present if you wish to use certain features, but otherwise need not be present—

1. The “Halcust” folder contains bespoke (HAL) files (e.g. customised reports). This should be on the server and on all clients likely to use the bespoke files.

2. In multi-user installations, the “Shared” folder should be on the server machine if you are using the FTP server facility. It can be used to store the files that are to be made available to the FTP clients.

3. The “Tmp” folder should be present if you will be using FirstContact’s Mail facility to send and receive external mail (i.e. to communicate with standard email programs outside your FirstContact network). The FirstContact External Gateway uses it to store mail attachments downloaded from the POP3 server before they are transferred to the

"Attach" folder and attachments that are to be uploaded to the SMTP server. These files can be deleted periodically.

4. The "Web" folder contains language and other files required if you wish to use FirstContact's Web Shop. This folder should be on the server machine. Please contact your local FirstContact representative for more details about the Web Shop.

5. The "Webcust" folder is used to store images used in the Web Shop (e.g. images of the Items that you sell). This folder should be on the server machine.

Starting FirstContact

Companies and Databases

The key components of a FirstContact system are the application and the database. The application, or program, has the following symbol in the directory window (Windows) or in the Finder (Macintosh)—

The database is the file used by FirstContact to store its data. In many cases, that data will pertain to a single company, but where there are separate departments or subsidiary companies, their data can also be stored in a single database. Each department or subsidiary will be set up in the FirstContact database, where they are termed ‘Companies’. If you set up more than one Company in FirstContact, each will be completely separate: there will be no common information, although it is possible to copy from one to another using the export and import functions or by dragging and dropping. Each Company within a database can be backed up separately or together.

The database is shown with the document symbol—

! ***The database must have the name “1Contact.HDB” and be present in the same folder or directory as the FirstContact application. If the database is moved or renamed, the next time FirstContact is loaded a new database will be created.***

Loading an Existing Database and Company

Single-user

Start FirstContact just like any other Windows or Macintosh application, by double-clicking the program icon. FirstContact will load the database named “1Contact.HDB”. If this is not present in the folder or directory, a new database will be created automatically.

The ‘Select Company’ window opens, where you should select a Company to work with.

Double-click the appropriate Company in the list, or highlight it and click the [OK] button towards the top left of the screen. The space in the top right of the screen shows the Company you have just selected. The database is now ready to use.

If you have only one Company in your database, you may find that having to select it every time you start FirstContact is unnecessary. For instructions about bypassing the ‘Select Company’ window, please refer to the section entitled ‘The Program Mode Register’ later in this chapter.

Multi-user

In a multi-user installation, launch FirstContact on the server first. Follow the procedure described in the previous section: choose any Company when the ‘Select Company’ window appears. Users will then be able to log on to work with any of the Companies stored within that database.

Select ‘Server’ from the Modules menu. The ‘Server Status’ screen appears. This can be used to monitor network activity.

The server can now be left alone.

When the time comes to shut down the server, two options are available on the File menu. If you choose ‘Quit’, FirstContact will automatically go into server mode the next time it is used. If you choose ‘Quit, Remove Autoserver’, it will not, allowing you to work on the server machine itself.

Creating a New Database

In the event that you need to create a new database, simply ensure there is no database file with the name “1Contact.HDB” in the same folder as the FirstContact application when launching. A new database will be created automatically.

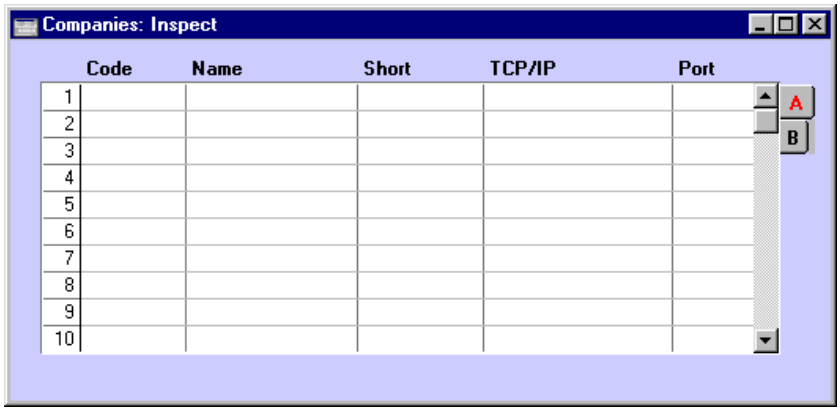
The “DBDef.txt” and “Default.txt” text files must be present in the same folder as the application when a new database is created. FirstContact will use these files to set some initial preferences in the new database.

The installation will not be correct if the “DBDef.txt” file is missing.

Creating a New Company

When creating a new database, the first task is to enter a new Company. As none currently exist, FirstContact automatically opens the ‘Companies: Inspect’ window which allows you to do this.

If the ‘Companies: Inspect’ window is not opened at this point, this is because your example of the “DBDef.txt” file has instructed FirstContact to create a new Company automatically. In this case, the ‘Select Company’ window will open instead: click the [OK] button towards the top left of the screen. Then, turn to the next section, ‘Importing from a Back-up’ and continue with the set-up sequence from there. When you reach the section entitled ‘Adding New Companies’, follow its instructions to change the Company’s name to something more suitable.



Click in the Code field in the first blank row and enter information as described below. Use the Tab or Return key to move from field to field.

The following fields are present in this window—

Code Enter a unique code. This can be a numeric code greater than 0 or an alpha code of up to five characters.

Name Enter a name by which this company or department can be identified.

Short If you have more than one Company in your database it is possible to switch between Companies in a work session, leaving windows from each Company open. This Short code will then be used as part of the window title to indicate to which Company the information in each window belongs.

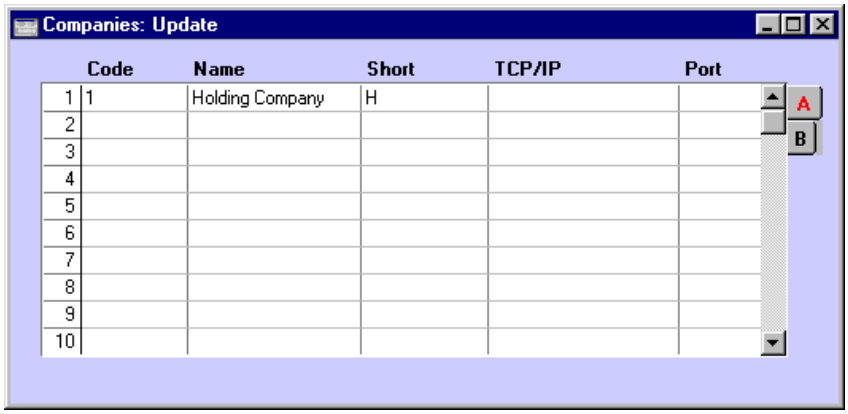
TCP/IP This field is described in the next section, ‘Creating a New Database - Multi-user’. It need not be considered in single-user systems.

Port This field is described in the next section, ‘Creating a New Database - Multi-user’. It need not be considered in single-user systems.

Flip B

Encryption Key This field becomes visible if you click the button marked “B” on the right-hand side of the ‘Companies: Inspect’ window. Again, this field is used in multi-user systems and need not be considered in single-user systems.

You can only enter one Company now: if you need more than one, you will be able to add them later in the set-up process (described in the ‘Modules, Users and Companies’ and ‘Adding New Companies’ sections below).

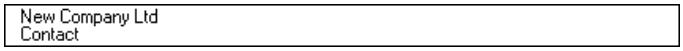


The “Default.txt” text file must be present in the same folder as the FirstContact application when a new Company is created. FirstContact will use this file to import some basic settings to the new Company. When the entry is complete and you have made certain that the “Default.txt” file is in the right place, click the [OK] button above and to the left of the Company screen.

You should now inform FirstContact that you wish to use the Company you have just created. The ‘Select Company’ list window will appear automatically—

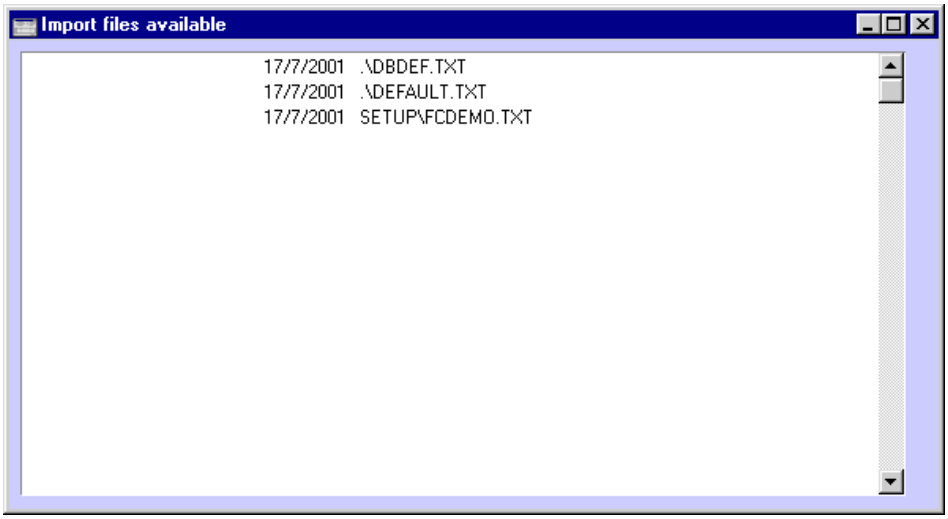
Select the single Company to work with and click [OK]. The Company Box to the right of the Button Bar changes to show that you have selected ‘New

Company Ltd' (this company name may vary slightly in different installations)—



Importing from a Back-up

FirstContact will now open a window listing back-up files which can be imported. FirstContact looks in the folder or directory containing the application for folders named "Backup" and "Setup". Any files in these folders in the correct format are listed in this window.



Proceed down one of the following routes, depending on your circumstances—

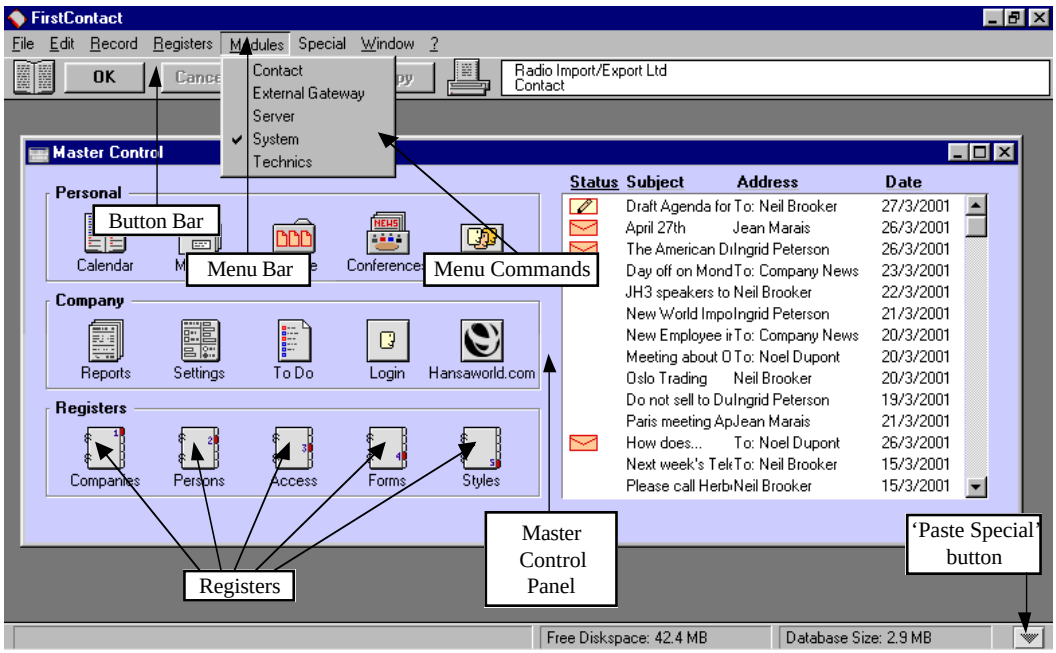
1. If you are launching FirstContact for the first time, you will not have any back-up files to be imported. If you do not wish to import the example database, close the window using the close box and refer to the next section, 'The Work Area'.

2. If you are launching FirstContact for the first time and wish to import the example database, highlight the file to be imported and click the [OK] button towards the top left of the screen. After the example database has been imported, FirstContact will quit for reasons of security. Restart the program, choose the single Company in the 'Select Company' window by highlighting it and clicking the [OK] button, and log in using the initials "SJ" (no password).

3. If you are creating a new FirstContact database which is to be based on your existing data (perhaps you are restoring from a back-up because your previous database has become damaged or because you are upgrading to a new version), highlight the back-up file to be imported and click the [OK] button towards the top left of the screen. For full details of this process, please refer to the 'Restoring from a Back-up' section at the end of this chapter.

The Work Area

Whether or not a back-up file was imported, the FirstContact work area will now appear. This will be the basis for all your work in FirstContact and is fully described in the next chapter, 'FirstContact's Work Area', but is illustrated below to enable you to identify the various parts of the screen mentioned in the following sections.



Settings

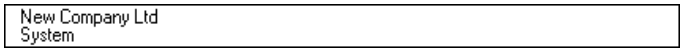
Each module contains a number of settings which can be used to control how that module operates. They are accessed using the 'Settings' item on the File menu or the [Settings] button in the Master Control panel. Before you start working with each module, you should consider its settings, since its functions depend on the settings being correct.

Many settings take the form of options or preferences. Others, such as Company Info, that will be considered next, require information or a number of records to be entered.

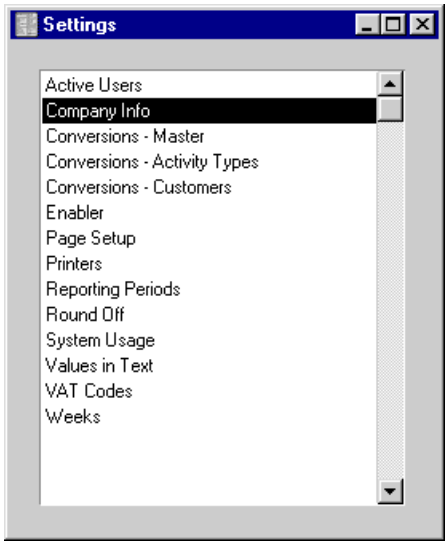
Changing the Company Name

The System module is where settings used throughout the FirstContact system are determined. You will now use it to enter company name, address and other information to be used in reports and documents such as Quotations. Select 'System' from the Modules menu.

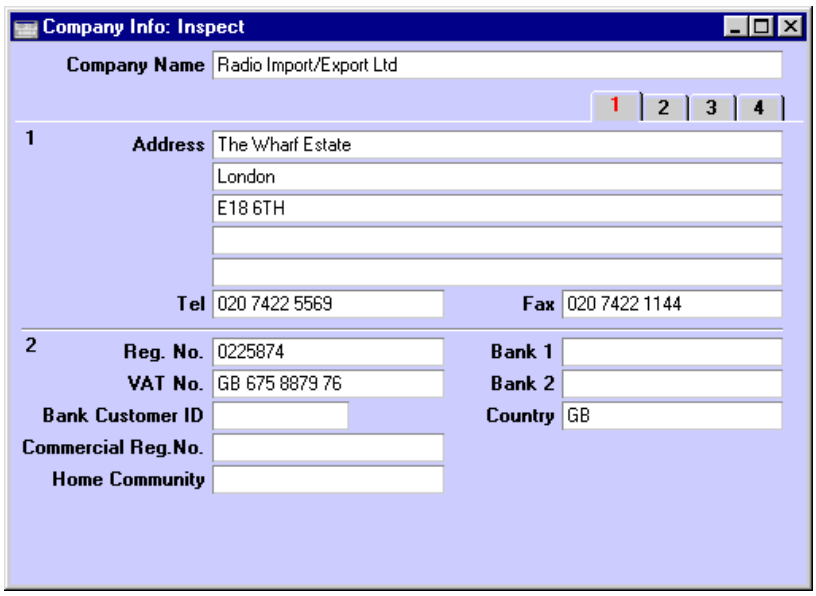
The Company Box to the right of the Button Bar changes to show that you have selected the System module. The Company name shown is a generic one allocated by FirstContact: the next step is to change this.



Select 'Settings' from the File menu or click the [Settings] button in the Master Control panel to bring up the 'Settings' list window—



In the list, select ‘Company Info’ by double-clicking. The ‘Company Info: Inspect’ window appears.

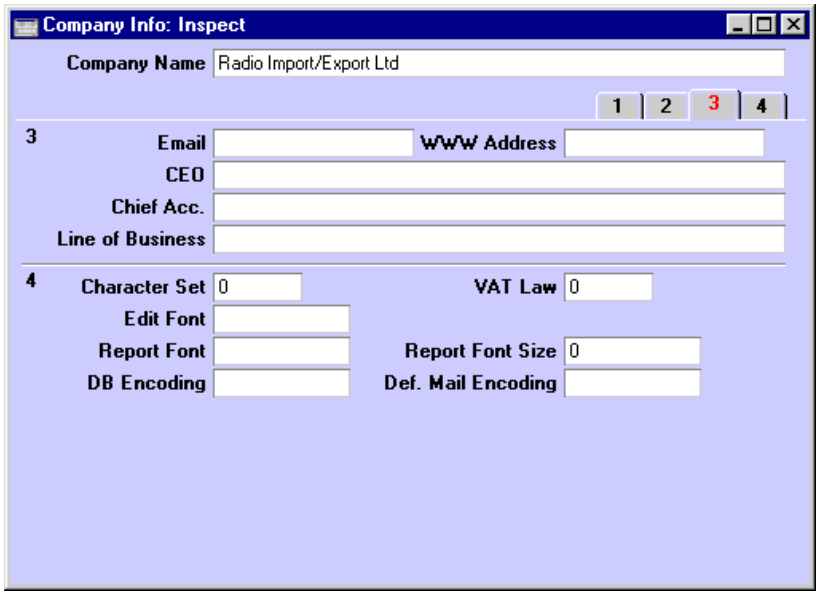


Enter the name, address and other data.

The Bank Customer ID is an ID number used for automatic (modem) communication with certain credit institutions in some countries.

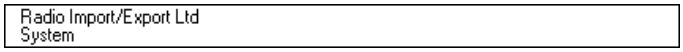
Click the [3] button towards the top right of the window to see the other fields in this setting.

The Edit and Report Font fields allow you to select different fonts for use on screen and in reports respectively. If nothing is entered in these fields, FirstContact’s default fonts will be used. These fonts are selected for maximum readability, and should only be changed if you have good reasons to do so. In non-English versions of FirstContact, these fields are used to select fonts with special character sets.



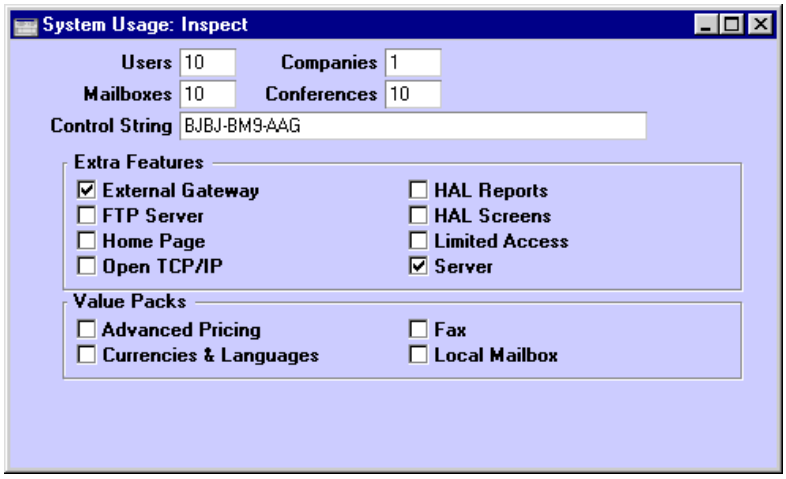
VAT Law is used to ensure the behaviour of FirstContact conforms to certain local conventions of the country in which it is being used. In the UK, this should be set to zero.

When you have completed the window, click [OK] to save the changes and close the window. The Company Box to the right of the Button Bar changes to reflect the changes you have just made.



Modules, Users and Companies

The next task is to ensure that you have been granted access to the appropriate modules and that the correct numbers of users and Companies have been registered. If you no longer have the 'Settings' list on screen, select 'Settings' from the File menu or click the [Settings] button in the Master Control panel once again. Select 'System Usage' by double-clicking. The 'System Usage: Inspect' window appears—



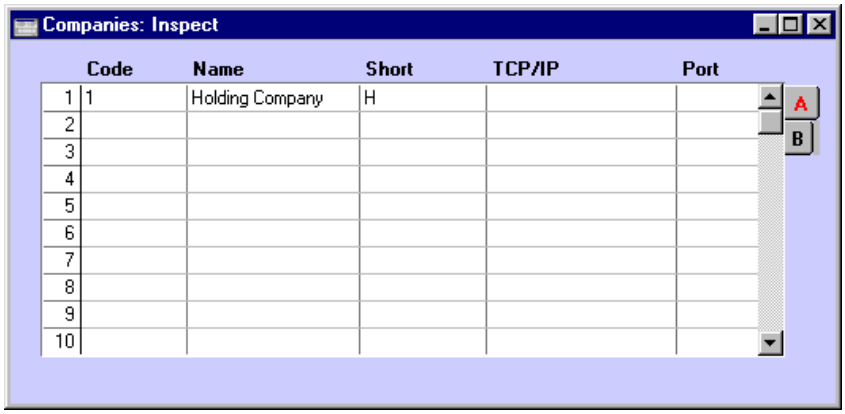
If you need more than one Company, enter the correct number in the Companies field. Ensure that the number of users is set to the correct number (and in any case is at least 1).

In the remaining sections of the window, select the modules that you require by clicking the check box next to each one so that a tick appears. Finally, click [OK]. The Modules menu will now contain the modules selected. These tasks should be completed before applying for a database key.

Adding New Companies

If you need more than one Company, the new Companies should now be added. Click [Companies], the left-hand button in the third row of the Master Control panel—

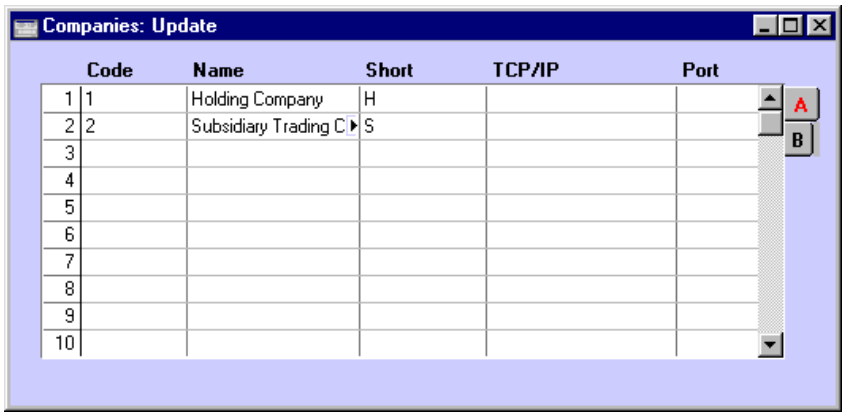
The 'Companies: Inspect' window that you saw earlier is opened, showing the Company that you created.



To create more Companies, click in the Code field in the first blank row and enter information as described in the section above entitled ‘Creating a New Company’.

If you are creating a new Company, the “Default.txt” text file must be present in the same folder as the FirstContact application. FirstContact will use this file to import some basic settings to the new Company.

It is advisable to enter as many Companies as you need now, so that you only need apply for an database key once. You will be able to enter all set up information to one Company and then to export those settings to the other Companies (or to transfer them by dragging and dropping).



When the entry is complete, click the [OK] button above and to the left of the Company screen.

For security reasons, FirstContact will shut down after any changes or additions have been made in the Company register. Restart the program to continue working.

For each Company added, you should now repeat the process described above in the ‘Changing the Company Name’ and ‘Modules, Users and Companies’ sections, entering the correct company name and address, and ensuring that access has been granted to the correct modules. To change Companies, select ‘Companies’ from the File menu and choose another Company in the list that appears. This work should be completed before applying for a database key.

The Database Key

The next stage is to inform FirstContact that you have a full licence for its use.

A FirstContact licence normally gives you the right to use the program for a single database. Each database will normally require its own database key provided to you on application by your local FirstContact distributor. When FirstContact is first purchased, this key is absent but FirstContact will be fully operational for 30 days after installation, allowing time for the set-up work described in the previous sections. After 30 days, if the key has not been applied for, FirstContact will change to demonstration mode: providing certain limits have not been reached, it will remain fully functional, but printing will be disabled. These limits are—

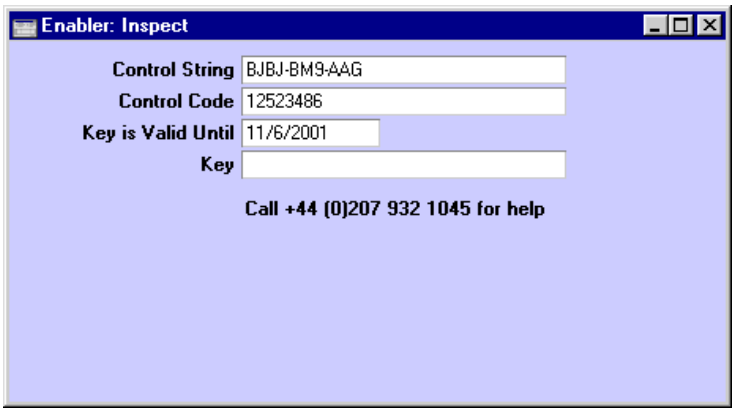
Register	**Maximum number of records**
Customers	20
Activities	100
Quotations	5
Mails	100
Customer Letters	20
Items	50

The key can be applied for at any time (before or after the 30 day point), but before doing so you should ensure you have entered all required Companies in the Company register, named them all in the Company Info setting, and given yourself access to the required modules and entered the number of users in the System Usage setting (all as described above).

On saving the System Usage window, FirstContact calculates a Control String based on the modules selected and the number of users and Companies entered. This will be visible if the System Usage window is reopened and will be copied by FirstContact to a second setting, the Enabler setting, where it is used to calculate a Control Code, an eight-digit number.

At this point, where a Control String and Control Code are known to FirstContact, the database will enter its demonstration mode 30 days from installation. To gain full use of the program, a database key needs to be acquired and entered. To do this, follow this procedure—

1. Use the Modules menu to ensure you are in the System module and select 'Settings' from the File menu. In the list, double-click 'Enabler'. The 'Enabler: Inspect' window appears.



2. Enter the expiry date of your FirstContact contract in the Key is Valid Until field. Click the [OK] button in the Button Bar to save and close the Enabler.

3. Contact your local FirstContact representative during normal working hours and quote the Control String, Control Code and contract expiry date. You may be asked to produce a Company Info report: this is described in Chapter 8, 'System Module'. You will then be given a key.

4. Enter the key and click [OK] to save the Enabler. This will inform FirstContact that you have a full licence for its use.

If, in the System Usage setting, the modules checked are changed or the number of users is altered, FirstContact will go into demonstration mode. Full use of FirstContact can be regained by reverting the System Usage setting to its original state.

If a new Company is added to the database, the Valid Until date is changed in the Enabler setting or the Company Name is changed in the Company Info setting of any existing Company, this will also cause FirstContact to go into demonstration mode. In this case, however, full use of FirstContact can only be regained by applying for a new key.

A record of your database key should be kept in a safe place: you will need to enter it again if you ever create a new database by restoring from a back-up file.

Set up your Companies and define the System Usage and Company Info settings for each before applying for a database key.

If the "DBDef.txt" file is missing

If you attempt to create a new database as described above in the section entitled 'Creating a New Database' but without a "DBDef.txt" file present in the same folder or directory as the FirstContact application, that database will be created successfully. However, the process will deviate from the path outlined in two respects—

1. The list of possible back-up files which can be imported will not be shown.

2. You will only have access to the System module.

You can either decide to start again or to proceed with the empty database. The former route is recommended as little time will have been lost. Follow these steps—

1. Close FirstContact using the 'Quit' command on the File menu.

2. Delete the "1Contact.HDB" file.

3. Locate the "DBDef.txt" file and move it to the folder or directory containing the FirstContact application. Also, ensure that the 'Default.txt' file is present.

4. Launch FirstContact again and follow the procedure described in the 'Creating a New Database' section.

If you decide to proceed with the empty database, follow these steps—

1. Ensure the "Default.txt" file is present in the same folder or directory as the FirstContact application and enter a single Company to the 'Companies: Update' window. This window is described in the section entitled 'Creating a New Company' above. Click the [OK] button to save.

2. On closing this window, the 'Select Company' window will open. Double-click the Company that you wish to work with.

3. The System module will be the only module available. The next step should be to remedy this. Select ‘System’ from the Modules menu and ‘Imports’ from the File menu. Double-click ‘Automatic, manual file search’ in the subsequent list. Locate the “DBDef.txt” file and import it. You will now have access to all modules.

4. Return to the ‘Creating a New Database’ section above and resume the sequence at the ‘Settings’ sub-heading.

Creating a New Database - Multi-user

To create a new, multi-user, database, essentially the same steps as those described above need be followed. Working on the server, simply ensure that there is no database file with the name “1Contact.HDB” in the same folder as the FirstContact application, and launch the application by double-clicking. However, make sure that the “DBDef.txt” and “Default.txt” files are present. A new database is created.

As in a single-user system, create your first Company as described in the section entitled ‘Creating a New Company’ earlier in this chapter. Make sure that the “Default.txt” file is present. Again, at this stage you do not need to consider the TCP/IP and Port fields.

All communications between clients and the server are encrypted using a built-in Encryption Key. If you would like an Encryption Key of your own to be used, click the button marked “B” on the right-hand side of the ‘Companies: Inspect’ window and enter your key in the Encryption Key field. You should enter the same key on the server and on the clients.

When the entry is complete, click the [OK] button. Again, as with the single-user system, the next stage is to inform FirstContact which Company you wish to use. The ‘Companies’ list will appear: highlight the single Company and click [OK].

Setting up the Server module

The database key requires that you make all purchased modules available on the server machine, and that you register the number of users there. Go to the Modules menu and select ‘System’. Next, use the ‘Settings’ function on the File menu to bring up the ‘Settings’ list window. Select ‘System Usage’ by double-clicking (or by clicking once and pressing [OK]). The ‘System Usage: Inspect’ window appears.

Select the Server module by clicking the check box so that a tick appears. Click the check boxes for the other modules you have purchased. Ensure that

the numbers of users and Companies are set to the correct number. Click the [OK] button in the Button Bar to save and close.

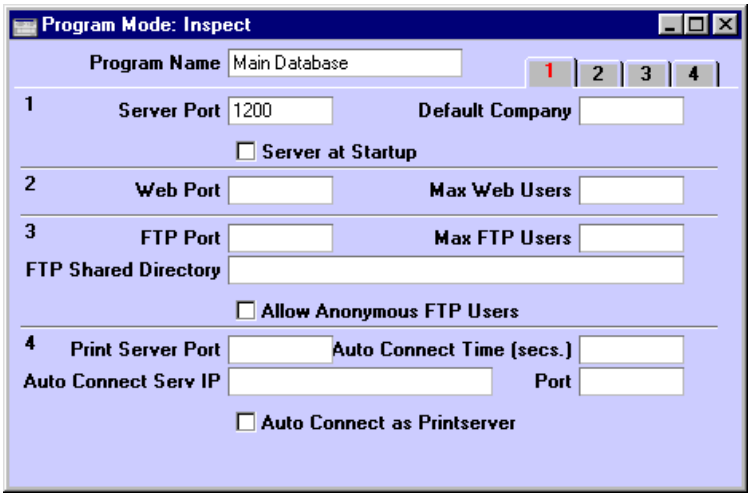
You should now enter your company's name, address and other details using the Company Info setting. This task is fully described in the section entitled 'Changing the Company Name' earlier in this chapter. If you need to create additional Companies, this should be done now, following the instructions in the 'Adding New Companies' section above. The Company Info and System Usage settings should be checked for each Company before the next stage: the application for a database key. Full details of this step can be found in the 'The Database Key' section above. It is only necessary to enter the database key to the server: the key will be copied to the client machines automatically.

Once you have finished this process, it doesn't matter which Company you end up in: all will be available to any client machines logging in.

Set up your Companies and define the System Usage and Company Info settings for each before applying for a database key.

The Program Mode Register

The next stage is to make this database available to the network. Select 'Technics' from the Modules menu and click the [Prog Mode] button in the bottom left-hand corner of the Master Control panel (or select 'Program Mode' from the Registers menu).



The fields on this window should be completed as follows—

Header

Program Name If you are using FirstContact under Windows, you can specify the name of the window in which FirstContact appears and of the application's button in the Taskbar (Windows 95/98/2000). Enter that name here.

Card 1

Server Port This field is for TCP/IP communication with FirstContact clients. Enter an arbitrary four-digit code to identify this database. If you have more than one server machine running FirstContact, or more than one copy of FirstContact running different databases on the same machine (not recommended), each must feature a unique Server Port number.

If you change the Server Port, you must quit FirstContact and restart for the change to take effect.

Default Company If you would like a particular Company to be used by default when you launch FirstContact, specify that Company here. The next time FirstContact is used, the Company specified here will be opened automatically and the 'Select Company' window will not appear.

This field can be used in single-user systems to ensure a particular Company is always used. This will be especially useful if there is only one Company, as in that case selecting a Company is an unnecessary step to be taken every time FirstContact is used. This is the only field that can be used in this register in a single-user system.

In multi-user systems, setting a Default Company on the server will apply to the server machine only. On each client machine, the Default Company can be used to ensure that it always logs on to the server.

Server at Startup Switch this check box on if you would like the Server module to be selected by default when you launch FirstContact.

Usually, it will not be necessary to use this check box. When the time comes to shut down the server, two options are available on the File menu. If you choose

'Quit', FirstContact will automatically go into server mode the next time it is used, even if the Server at Startup is not checked. If you choose 'Quit, Remove Autoserver', it will not, allowing you to work on the server machine itself.

Cards 2, 3 and 4

The remaining fields in this register are only used in the specialised situations when setting up the Web Shop, FTP server and Print and Fax servers and when establishing an open TCP/IP link with FirstContact. They can be left blank when setting up a data server.

For details about setting up an FTP server, please refer to the section entitled 'Setting up an FTP Server' below. For details about setting up Print and Fax servers, please refer to the section describing the Printers setting in the 'System Module' chapter later in this manual. For details about setting up a Web Shop and about establishing an open TCP/IP link with FirstContact, please refer to your local FirstContact representatives.

Once card 1 of this register is complete, click the [OK] button in the Button Bar to save. If you have entered a Server Port number for the first time (or changed the one that was already there), quit FirstContact and restart to allow the change to take effect.

Complete the Program Mode screen before applying for a database key

The final task is to select 'Server' from the Modules menu. The 'Server Status' screen appears. This can be used to monitor network activity.

The server can now be left alone.

Logging on from a Client

On each client, a new database should now be created. Its sole task will be to enable you to log on to the server: little information will be saved on the client machines. Again, essentially the same steps as those described above need be followed. Ensure that there is no database file with the name "1Contact.HDB" in the same folder as the FirstContact application, and launch the application by double-clicking. However, make sure that the "DBDef.txt" and "Default.txt" files are present. A new database with the name "1Contact.HDB" will be created.

Once again, the first task is to ensure the correct Companies have been entered. To do this use the Company register as described in the section entitled 'Creating a New Company' earlier in this chapter. Make sure that the

"Default.txt" file is present if you need to create new Companies. All that it is necessary to do here is to enter once again the Companies that you have previously entered to the database on the server enabling you to log on to them.

In the Code field (the left-hand field of the grid), enter the same Code(s) that you entered on the server. The TCP/IP and Port fields now become relevant. In the TCP/IP field, enter the IP address of the server machine. This can be obtained from the TCP/IP control software on the server and is used to enable the client copy of FirstContact to locate the correct server on the network. In the Port field, enter the value that you entered to the Server Port field on the Program Mode screen on the server. This is used to enable the client FirstContact to locate the correct copy of FirstContact on the server.

If you entered an Encryption Key to the Company on the server, you should enter the same one to all Companies on the client that will be used to log on to that server. Click the button marked "B" on the right-hand side of the 'Companies: Inspect' window to do this.

When you have entered all relevant Companies, click [OK].

The 'Companies' list will now appear allowing you to inform FirstContact which Company you wish to use. Double-click the appropriate Company in the list, or highlight it and click [OK]. If the result is that FirstContact displays an error message "User Limit on Server reached" and you are certain this is not the case, the probable cause is that the Company Code of the chosen Company (in the first column of the Company register) does not match that of any of the Companies that were entered on the server.

In typical multi-user installations, the next task will be to enter details of each member of your staff that will be using FirstContact. You might wish to limit each person to areas of FirstContact relevant to their job and to give each one a password, to prevent unauthorised access. To do this, you will be using the Person register in the System module: please refer to the 'System Module' chapter at the end of this manual for full details.

It is recommended that any further set-up work is carried out either from a single client machine or from the server itself. Until it has been completed, no other users should be allowed to log on.

Setting up an FTP Server

The File Transfer Protocol (FTP) is a means of transferring files between two connected computers. One computer is configured as an FTP server and the other connects to it as a client. Working from the client machine, files can be copied to the server (“uploaded”) and copied from the server (“downloaded”). In large installations, it can be convenient to have an FTP server running permanently. It can be used as a central store of important files such as marketing materials, document templates and so on.

FirstContact can be configured to act as your FTP server software. Once this has been done, members of staff (known as “Persons” in FirstContact) can log in using proprietary FTP client software such as Fetch or Transmit. If required, Customers can log in as well.

If you are already using a FirstContact multi-user system, the copy of FirstContact that is acting as your data server can also act as your FTP server. This means that your data server computer will also be your FTP server computer. However, if FTP usage is likely to be heavy, a separate machine can be used. In this case it will have a separate database, so you will need to enter once again those Persons and Customers that are to have FTP access.

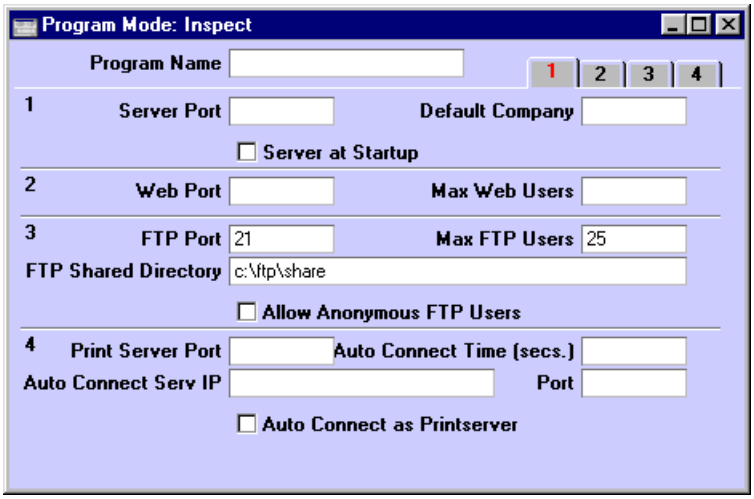
To set up a FirstContact FTP server on a dedicated machine, follow the steps below in full. If you have already set up your FirstContact data server following the instructions earlier in this chapter and would like it to act as an FTP server as well, work on that machine and follow the steps below starting with step 2.

1. Create a new database on the machine that is to act as your dedicated FTP server following the instructions in the section entitled ‘Creating a New Database - Multi-user’ above. Only one Company is necessary.

2. In the System Usage setting in the System module, ensure that the boxes marked “Server” and “FTP Server” have been selected (i.e. they contain ticks). Click the [OK] button in the Button Bar to save and close. This may result in you needing to apply for a new database key.

3. Select ‘Technics’ from the Modules menu and click the [Prog Mode] button in the bottom left-hand corner of the Master Control panel (or select ‘Program Mode’ from the Registers menu).

   In the case of a dedicated FTP server, only the fields on card 3 need be completed, as illustrated and described below. If the FTP server is a data server as well, the fields on card 1 should also be completed, as described earlier in this chapter.



FTP Port

Enter an arbitrary code here to represent the server socket that will be used for FTP communications. This must be different to the Server and Web Ports above. When logging on, Customers and Persons will add this to the IP address for your server machine (usually in the format IP address:Port number).

Note that the most commonly used FTP Port number is 21, and some FTP client applications may have difficulty establishing a connection if a different number is used.

If you change the FTP Port, you must quit FirstContact and restart for the change to take effect.

Max FTP Users

Enter here the maximum number of Customers and Persons that you anticipate will be logged on to your FirstContact FTP server at any one time.

FTP Shared Directory

Specify here the name of the folder that is to be made available as the root directory to everyone logging on to your FirstContact FTP server. This folder will contain the files that will be copied to and from the server by FTP users. Any folders inside this folder will also be available to FTP users.

In the following example showing the correct syntax for Windows and Macintosh users, the shared folder is

called “Share” and it is situated inside the “FTP” folder on the hard disk. The \ character is used as a separator between folder names under Windows while : is used on the Mac.

Windows c:\FTP\share

Mac hard disk:FTP:share

If the “Share” folder is inside the folder containing the FirstContact server application, there is no need to specify the full path name.

An entry must be made to this field otherwise FTP users will not be able to log on. Take care not to make any mistakes when typing the folder path (and make sure that the folder you specify exists), otherwise you might make more files available to FTP users than you intend.

Allow Anonymous FTP Users

Check this box if you would like FTP users to be able to log on to your FTP server without specifying a user name or a password.

If this box is not checked, you will be able to restrict access to your FTP server using the FTP Access box for each Person and Customer. Only Persons and Customers whose FTP Access box has been checked will be able to log on. Persons (i.e. members of staff with their own record in the Person register) will use their initials as their Login ID and will use their normal FirstContact password. Customers will use their Customer Number as their Login ID. They can be allocated a password using the ‘Change Password’ function on the Special menu of the ‘Customers: Browse’ window. They will use the same password for FTP and Web Shop access. Customers are fully described in the ‘Customers’ chapter of this manual, while Persons are described in the ‘System Module’ chapter.

Persons granted FTP Access will always be able to log on to your FTP server, but you must be using the Limited Access feature if you want Customers to be able to log on as well. You can activate the Limited Access feature using the option in the System Usage setting in the System module. You may need to apply for a new Enabler key after making this change.

4. Once card 3 of the Program Mode register is complete, click the [OK] button in the Button Bar to save. If you have entered an FTP Port number for the first time (or changed the one that was already there), quit FirstContact and restart to allow the change to take effect.

5. If your FTP server is separate to your data server, you will now need to enter once again those Persons and Customers that are to have FTP access.

6. The final task is to select 'Server' from the Modules menu. The 'Server Status' screen appears. The FTP server can now be left alone, and FTP clients will be able to log on.

7. If you will be allowing users to access your FTP server through a modem connection, don't forget to make any necessary adjustments to your firewall.

Shutting Down

Remember to make a back-up before shutting FirstContact down. Back-ups are described in the next section.

Single-user

To shut FirstContact down, select 'Quit' from the file menu. The keyboard shortcut Alt-F4 (Windows) or ⌘-Q (Macintosh) can be used. All open windows will be closed, and you will be asked if you want to keep any changes that have not yet been changed.

Multi-user

FirstContact clients can be shut down in the same way as FirstContact single-user: by selecting 'Quit' from the File menu.

Two methods are available by which the server can be shut down—

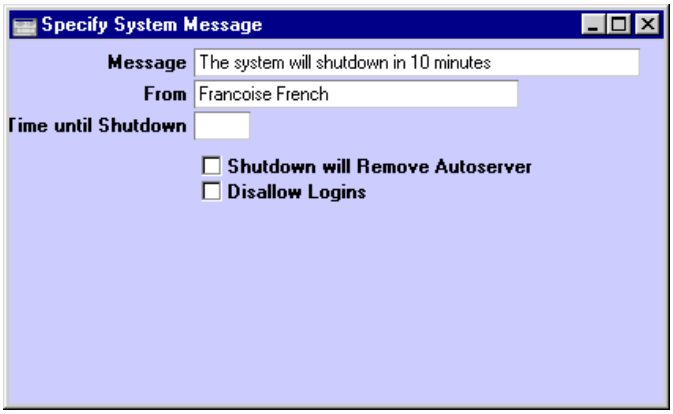
1. If 'Quit' on the File menu is used, the server will automatically enter server mode the next time it is started up.

2. If 'Quit, Remove Autoserver' on the File menu is used, the server will not go into enter server mode the next time it is started up. This option should be used if you want to do some work on the server.

If you need to close the server down and there are some clients logged in, you can send a warning message. To do this, you should be working on a client and you should have logged in as a Person that has access to the Technics

module (this is described in the section describing the Access Groups register in Chapter 8, 'System Module'). Follow these steps—

1. Select 'Technics' from the Modules menu.
2. Select 'Maintenance' from the File menu.
3. When the 'Maintenance' list window appears, double-click 'System Message'. The following window appears—



Complete the window as follows—

Message Type in the message that you want all users to read.

From Type in the author of the message: this will also be shown to all users. Your name (i.e. the name of the current user) will appear here by default.

Time until Shutdown

Specify here the number of minutes that you want to wait until the server shuts down. This should be sufficient time to allow the other users to save their work and quit FirstContact.

If this field contains a value, the server will be shut down automatically after the specified period of time. If this field does not contain a value, the server will not shut down. This means this function can also be used to send a message to all users at any time.

Shutdown will Remove Autoserver

If the Time until Shutdown field above contains a value, the server will be shut down automatically after the

specified period of time. Check this box if you want the server to be shut down in the same way as if the 'Quit, Remove Autoserver' option had been used. Do not check this box if you want it to be shut down in the same way as if the 'Quit' option had been used.

Disallow Login Check this box if you want to prevent new users logging in during the Time until Shutdown.

4. Click the [OK] button in the Button Bar. The Message will be shown to all users.

5. Close your own FirstContact client.

6. The server will shut down automatically after the specified time.

Backing Up

When the day's work with FirstContact is done, we advise you to make a back-up. It is a good idea to save a copy of the file on a diskette and store it in a safe place. It might seem unnecessary to make a back-up every day, but the short time this takes is a good investment for the day something goes wrong with the hard disk. Name your back-up files systematically with dates so that you can easily restore the database, should an accident occur.

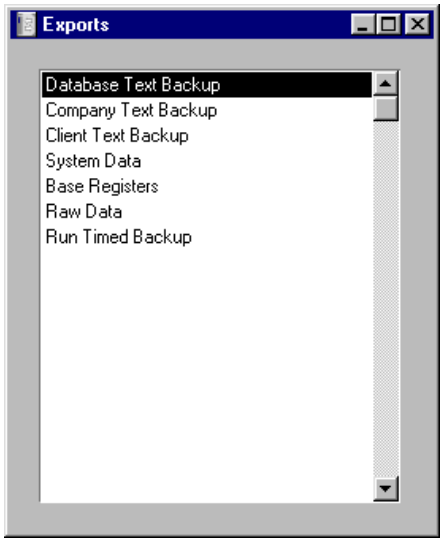
If you get a virus on your computer, you must first try to establish the date when your computer was infected. In this case you must restore your data from a back-up created before the infection date. Otherwise you run the obvious risk of re-infecting the computer again.

FirstContact's method of back-up is fast and economical. The data is saved as a back-up file that takes up a minimal amount of space, and the back-up files are independent of the program versions. Of course, it is also possible to copy the database file as it appears on your hard disk, but this is not so economical in terms of disk space, and a subsequent restoration may not be successful if the version of your FirstContact application has changed since the back-up was made.

! ***Use FirstContact's built-in back-up feature to guarantee a successful restoration.***

To create a back-up, follow these steps—

1. Select 'System' from the Modules menu.
2. Choose 'Exports' on the File menu. The Exports window is shown—



3. Select ‘Company Text Back-up’ (if you wish to back up the data in the database relating to the single Company currently selected) or ‘Database Text Back-up’ (if you wish to back up the whole database) from the ‘Exports’ window and click [OK].

   Usually the ‘Database Text Back-up’ option should be used. Some registers and settings (e.g. the System Usage setting, Mailboxes and Conferences) are stored at database level, not Company level. These will not be exported by the ‘Company Text Back-up’ option, even if your database only contains a single Company. The ‘Company Text Back-up’ option is intended for use in the situation where you need to move all the information relating to a specific Company from one database to another.

4. The ‘Specify Text Backup’ window appears. This offers you 40 characters with which to describe the back-up file that you are about to create. If it becomes necessary to restore from a back-up, this description will be shown in the list of importable files to help you select the correct one.

   Enter an appropriate description and click [OK].

5. If you have chosen to back up the whole database and you have more than one Company, you will now be asked to log in to any that you have not yet used in this work session. For reasons of security, if you are not able to log in to all Companies, the back-up procedure will be halted.

6. FirstContact opens a dialogue where you can name and place the export file. Enter the name of the file in the filename area and locate it in the appropriate directory in the usual way. The name of the back-up should include the date the back-up was made, but remember that you can use a maximum of eight characters if you are using Windows NT version 3. Then, click [Save].

   It is recommended that the back-up file be stored in a folder or directory named “Backup” which should be in the same folder or directory as the FirstContact application. All back-up files in this folder will be shown in a list of importable files if it becomes necessary to restore from a back-up.

   A message window informs you about the progress of the export.

When the export is finished, you are brought back to the ‘Exports’ list. Close it using the close box.

Under no circumstances should you edit or change a back-up file with another program.

Automatic Timed Back-ups

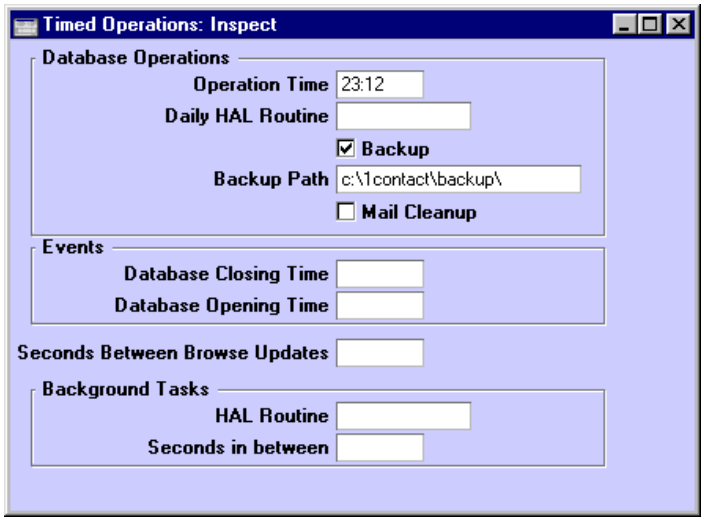
The importance of establishing a regular routine for backing up cannot be emphasised enough. Because FirstContact uses a single file database in which all your information about Customers, Activities, Quotations etc. is stored, if you lose that file, you have lost not just a single document, but all your customer information.

To make this task easier, FirstContact contains a timed back-up feature whereby a database back-up file can be created automatically every day. To specify when the back-up files are to be created, and where they are to be stored, follow the steps outlined below. In multi-user systems, these steps should be carried out on the server machine only.

1. Select ‘Technics’ from the Modules menu. In multi-user systems, this should be done on the server machine, when no other user is logged in. To gain access to the Modules menu, select ‘Quit, Remove Autoserver’ from the File menu and restart FirstContact.

If ‘Technics’ is not available on the Modules menu, this might be because you are not using the server machine, or, in a single-user system, because you have not granted yourself access to the Server module in the System Usage setting.

2. Choose ‘Settings’ from the File menu.Double-click ‘Timed Operations’. The following window appears—



3. Set the Database Backup Time to the appropriate time, when it is likely that no-one will be using FirstContact. The 24-hour clock should be used, and a colon (:) used as the separator between the hour and the minute. The back-up file will be created at the specified time, even if there are still users logged in to FirstContact. However, such users will find the speed of operation to be much reduced while the back-up is being carried out. It is therefore highly recommended that a time is specified that is outside working hours, to minimise such inconvenience.

4. Specify the Database Backup Path, which determines where on your hard disk the back-up files are to be saved. If this field is left blank, the back-up files will be saved in the folder containing the FirstContact application.

   The following example shows the correct syntax for Windows and Macintosh users. The back-up files will be saved in a folder called “Backup” inside the “FirstContact” folder on the hard disk. The \ character is used as a separator between folder names under Windows while : is used on the Mac. Note that the separator appears as the final character in the path.

Windows	c:\FirstContact\backup\
Mac	hard disk:FirstContact:backup:

Note that if a mistake is made (for example, there is a syntax error or a non-existent folder is specified) there is a risk that the back-up file will not be created.

5. Click the [OK] button in the Button Bar to save the back-up specifications.

Once the timed back-up feature has been set up as described above, a new back-up file will be created automatically every day at the same time. It will be given the name “TBYYMMDD.TXT” where “YYMMDD” represents the current date. The file will contain a back-up comment stating that it was created by timed back-up and showing the date and time this occurred.

Backing Up Using Specialist Back-up Software

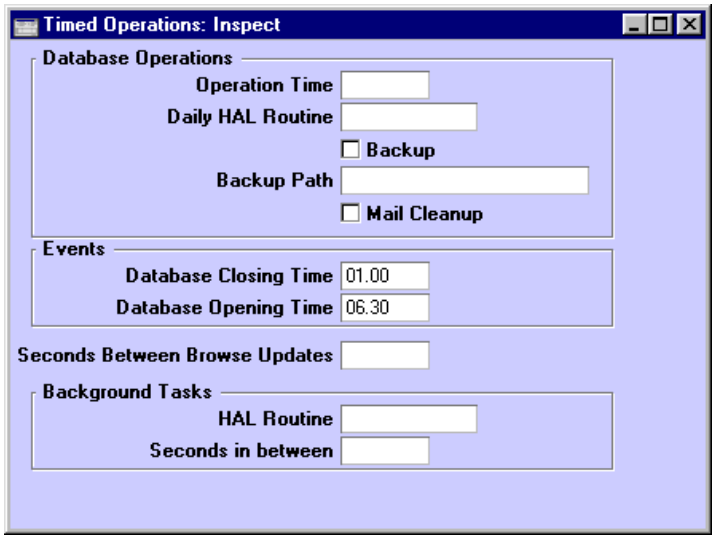
As described above, we strongly recommend that FirstContact’s built-in back-up facilities are used as the main part of your back-up strategy. They are more economical in terms of disk space and are more reliable in that the success of a restoration is guaranteed even if the version of your FirstContact application has changed.

However, some users may prefer to rely on specialist back-up software such as Retrospect to produce back-up tapes that can be stored off-site. Such software can sometimes fail to create a back-up file if the files being backed up are still in use. For example, a user may have gone home having forgotten to log off (or having left their machine producing a report) and this may cause the back-up to fail.

To cater for this eventuality, FirstContact can be instructed to alter the state of the database so that, as far as the back-up software is concerned, it appears not to be in use. To do this, follow these steps (using the server machine in multi-user systems)—

1. Select ‘Technics’ from the Modules menu and then choose ‘Settings’ from the File menu.

2. Double-click ‘Timed Operations’. The following window appears—



3. Set the Database Closing Time to a few minutes before the moment the back-up software is scheduled to start work. The 24-hour clock should be used, and a colon (:) used as the separator between the hour and the minute.

4. Set the Database Opening Time to a few minutes after the moment the back-up software is scheduled to finish work.

5. Click the [OK] button in the Button Bar to save the changes.

Once these steps have been followed, in the case of the user who has gone home having not logged off, they will return the next morning to find their machine still logged in to FirstContact. Despite this, the back-up should have been carried out successfully.

Restoring from a Back-up

To restore from a back-up, you must first create a new database. Then import the back-up file using the ‘Imports’ function on the File menu in the System module.

The replacement of a safety back-up is a non-destructive process, i.e. the back-up file is not affected by the reading process. This means that you can use the same back-up file more than once.

For reasons of speed, it is recommended that the process of restoring from a back-up be carried out on the server machine in multi-user systems. If this is not possible, a single client machine should be used. If you have separate

back-up files for different Companies, they should be imported individually. Attempting to import them simultaneously using different client machines could result in data being lost.

Restoring from a back-up is done in the following way—

1. Move the old database (named "1Contact.HDB") to another folder/directory or to a diskette, to avoid mixing things up. Rename it so that you know what it contains.

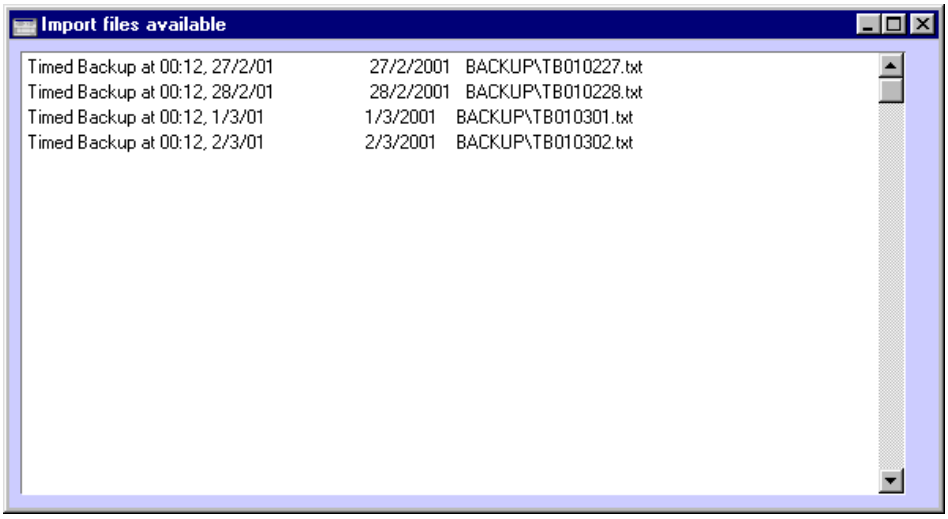
2. Delete the database file "1Contact.HDB" from the folder or directory with your FirstContact application. Double-clicking the FirstContact application now will force it to create a new database, as described earlier in this chapter.

It is important to restore to a new, empty database, to avoid mixing the restored data with the old, damaged database.

The "DBDef.txt" and "Default.txt" files should always be present in the same directory/folder as the FirstContact application. They contain some important data used when setting up the new database and creating new Companies. If this file is missing, your FirstContact application may not work the way you expect it to do!

3. As part of the process of creating a new database, a list of back-up files is shown. To be included in this list, a back-up file must be stored in the "Backup" or "Setup" folder or directory, which should be in the same folder or directory as the FirstContact application.

   In the list, the filename of each back-up file is shown together with the date it was saved and any description added when it was created (see step 4 in the previous section).

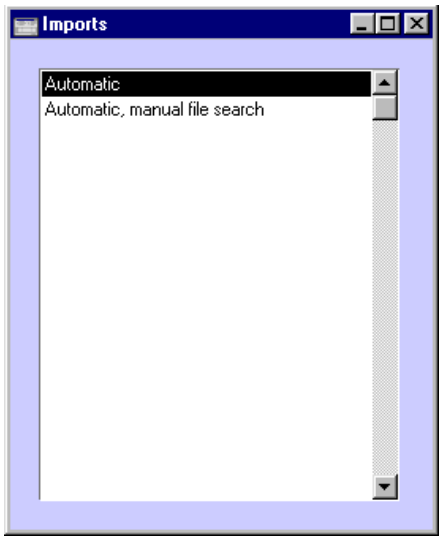


4. Highlight the file you want to import (the back-up to which you wish to revert) and click [OK] (or double-click on the name of the file). The back-up data will be imported. A message window informs you about the progress of the import. For reasons of security, FirstContact will close when the import finishes if the back-up file contains at least one record in the Person register. Restart the program and type your database key in to the Enabler setting: you will then be ready to continue working.

Note that there are certain circumstances in which FirstContact will show files in the list of available back-up files, but not be able to import them successfully. This will occur on both Macintosh and Windows machines if the filename does not comply with the DOS naming convention (i.e. it has a maximum of eight characters followed by a three character extension). If the name of your back-up file does not comply with this convention (or it is not shown in the list of available files because it is not stored in the “Backup” or “Setup” folder or directory), continue with these steps—

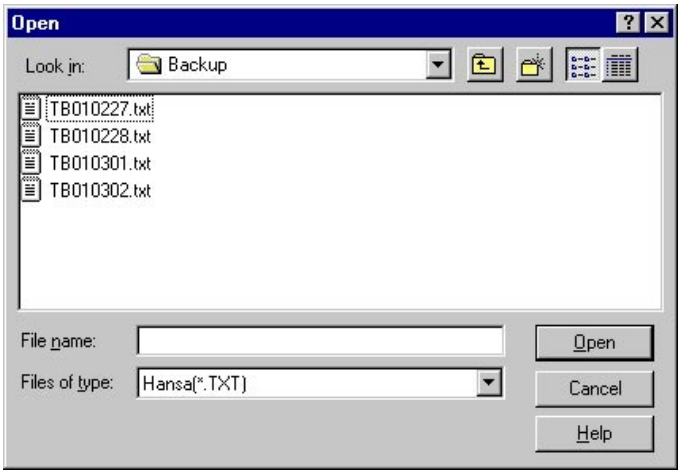
5. If it is still open, close the list of available import files using the close box.

6. In the System module, choose ‘Imports’ from the File menu. The ‘Imports’ window is shown—



7. Select ‘Automatic, manual file search’ and press the [OK] button (or double-click on ‘Automatic, manual file search’).

   FirstContact opens a dialogue box with a list of the files in the current folder of the current volume. To find the back-up file, scroll through the list or select another folder or volume in the normal way.



8. Once you have found the file you want to import (the back-up to which you wish to revert), highlight it and click [Open] (or double-click on the name of the file).

   A message window informs you about the progress of the import.

When the import has finished, FirstContact will close, for reasons of security if the back-up file contains at least one record in the Person register. Restart the program and type your database key in to the Enabler setting: you will then be ready to continue working.

Upgrading from Previous Versions of FirstContact

The latest version of Hansa is always available from Hansa's website, www.hansaworld.com, from where upgrades should be obtained. If you are online, clicking the [Hansaworld.com] button in the Master Control panel will take you to this site.

Inevitably, new versions will incorporate significant structural changes. Because of this, it cannot be guaranteed that they will be able to open databases created by previous versions unless the export and import functions are used.

To upgrade, follow these steps—

1. Before installing the new version, create a database back-up as usual and as described above using the old application.

2. Download the new version of FirstContact and install it in a new folder or directory.

3. Ensure that the new folder or directory contains the "DBDef.txt" and "Default.txt" files, but not a "1Contact.HDB" file. Ensure it also contains a folder or directory named "Backup" which in turn contains the back-up file created in step 1, and that this file is named according to the DOS naming convention.

4. Copy the following folders and their contents from the old FirstContact folder to the new one: "Attach"; "Halcust"; "Shared"; "Tmp"; "Web"; and "Webcust". You may not have all of these folders in your installation: if so, copy the ones that you do have and don't worry about those that are missing. Do NOT copy the "Hob" folder.

5. Launch the new FirstContact application. A new database is created.

6. Import the back-up created by the previous version of FirstContact using the procedure described in the previous section, ‘Restoring from a Back-up’.

For reasons of speed, it is recommended that backing up, restoring and upgrading are carried out on the server machine in multi-user systems. If this is not possible, a single client machine should be used. If you have separate back-up files for different Companies, they should be imported individually. Attempting to import them simultaneously using different client machines could result in data being lost.

FirstContact Work Area

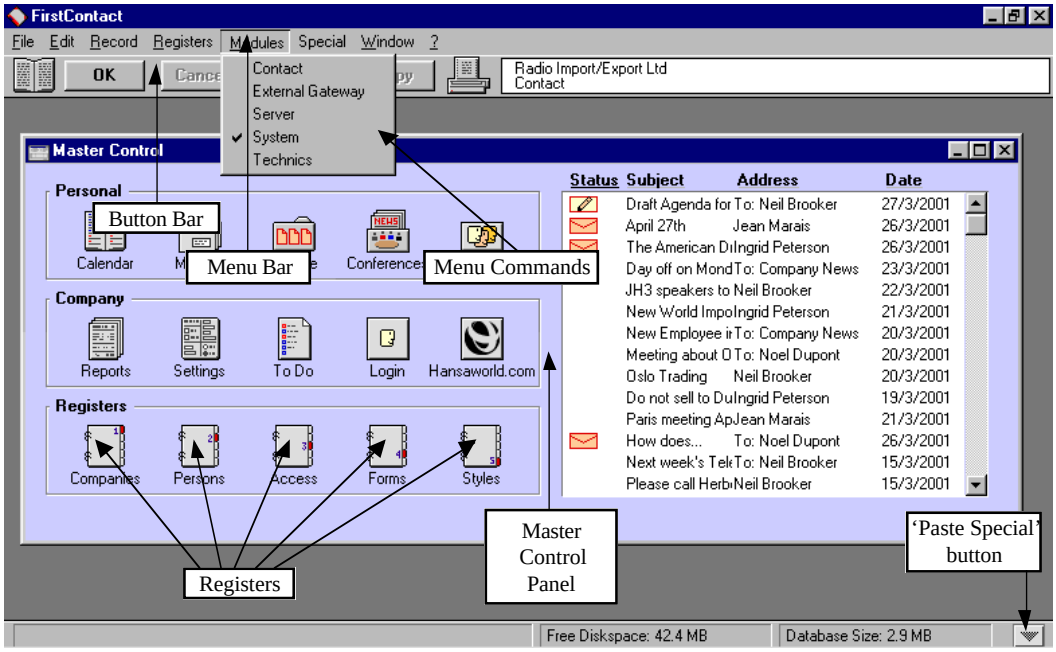
Chapter 2: Work Area

When a database has been opened or created, FirstContact's desktop will appear, with tool palettes at the top and bottom of the screen. The icons in these palettes are used as shortcuts to different parts of the program.

Most operations in FirstContact can be executed in three different ways—

- Selecting a menu
- Clicking a symbol in a tool palette
- With a keyboard command

Use the method you feel most comfortable with. In the beginning you may find it easiest to select from menus or tool palettes, but when you get more used to the program, you will find the keyboard commands faster to work with.



Tool Palettes

FirstContact's work area contains three tool palettes with buttons and icons. The icons are shortcuts to different parts of the system.

One palette is located at the top of the work area. It is called the Button Bar. A second, movable, tool palette, the Master Control panel, is located by default in the centre of the screen. This contains three rows of buttons. Those in the second row (entitled 'Company') duplicate some of the functions on the File menu. The buttons in the third row duplicate the commands on the Registers menu. These buttons vary with the selected module.

Since these tool palettes are always visible to the user, it is often simpler to use them than to select functions from the menus.

The Button Bar

Under the menu bar there is a narrow palette with four buttons and two icons. We call it the Button Bar. The buttons are equivalent to four of the commands on the Record menu.

The Book

On the far left of the Button Bar there is a Book icon. With this icon you can scroll through the information on the screen. The function varies slightly according to the part of the program you are working in.

Browse windows

In a **browse window** where a list of records is shown, you may move through the list a page at a time using the Book icon. Click the left page of the Book icon for the previous page of records, and the right page for the next page.

Record windows

If you are working in a **record window** that shows an individual record, you can use the Book icon to go from record to record. To open a record window, you will have double-clicked on a record in a list in a browse window. If you click the right-hand page the next record in that list will be opened, and at the

same time *everything you may have changed* in the record you are leaving *will be saved*. Similarly, clicking the left-hand page will open the previous record in the list.

Reports

With the Book icon you may also go from page to page in a **report**. Click the right page for the next part of a report, and the left for the previous part.

The Buttons

In the Button Bar there are four buttons. Their functions are all duplicated on the Record menu.

[OK]	Confirms the data you have entered, e.g. saves a record in a register or prints out a report. When used from a browse window, [OK] opens the selected (highlighted) record for editing.
[Cancel]	Cancels the data entry process and brings you back to the previous window. Changes made to the record are not saved.
[New]	Opens a new blank record for data entry.
[Copy]	Creates a new record which is a copy of that selected. In many cases, the new record will contain the current date, not the date of the copied record.

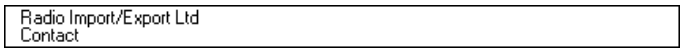
The Printer

On the right of the Button Bar there is a Printer icon. You can start a printout directly by clicking on the Printer icon, but only when the screen shows something that can be printed directly, e.g. a report written to screen, or a Quotation in a record window. The ‘Print’ command in the File menu has the same function.

When you start a printout, it will print directly on your selected printer. Normally, no printer dialogue is shown.

When printing documents, clicking the Printer icon while holding down the Shift key will usually cause the document to be printed to screen. Usually this will be when the Printer icon is used from a record window showing a single record.

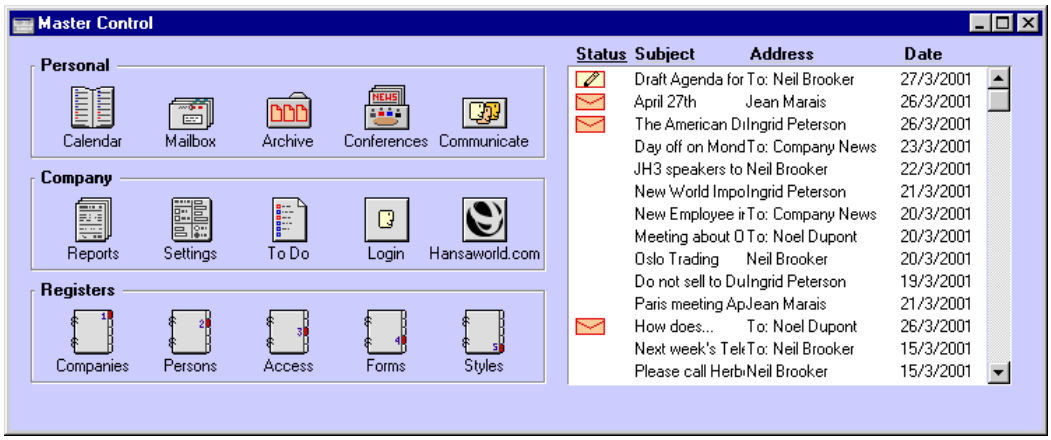
The Company Box



The window on the far right of the Button Bar shows which FirstContact module you are working in, and the name of the current Company.

The Master Control Panel

This panel appears in the centre of the screen when FirstContact is opened. It cannot be closed, but can be brought to the front at any time using the 'Master Control' item on the File menu. Windows users can use the keyboard shortcut Ctrl-M, while Macintosh users can use ⌘-M.



The panel contains three rows of buttons—

Personal These buttons allow you to communicate with other users of your FirstContact system and to organise your diary. This provides a means of recording appointments and other tasks. Some of these buttons have a keyboard shortcut, as shown below, which can be used when the Master Control panel is the active (front) window.

[Calendar] Click this button to open the Calendar: a graphic representation of your completed Activities and those of other users. The Calendar is fully described in Chapter 7, 'Activities, To Do and Calendar'.

[Mailbox] Windows keyboard shortcut: Ctrl-Shift-M
Macintosh keyboard shortcut: ⌘-Shift-M

If you are using FirstContact's Mail facilities, click this button to open your Mailbox. From here, you can send mail to other users in your FirstContact system and read mail that has been sent to you. Your Mailbox is also used to send and receive external mail (i.e. to communicate with people outside your FirstContact system who use standard email programs). The contents of your Mailbox are also shown in the area on the right-hand side of the Master Control panel. Mail is fully described in Chapter 6, 'Mail'.

[Conferences] If you are using FirstContact's Mail facilities, Conferences are addresses to which mail can be sent, from where it can be read by all users (subject to access restrictions). Click this button to open a window showing the available Conferences. Conferences are fully described in Chapter 6, 'Mail'.

[Communicate] Windows keyboard shortcut: Ctrl-Shift-W
Macintosh keyboard shortcut: ⌘-Shift-W

If you are using FirstContact's Mail facilities, click this button to produce a list of users currently logged in. Only those users that have Mailboxes will be listed. Double-click on a user's initials to chat with that person. Chat is described in Chapter 6, 'Mail'.

Company The first two buttons are equivalent to two of the commands on the File menu. Clicking either button produces a list of options from which the required one can be selected by double-clicking. These options will vary depending on the current module.

The remaining buttons provide more tools to help you communicate with other users of your FirstContact system.

Each of these buttons has a keyboard shortcut, as shown below, which can be used when the Master Control panel is the active (front) window.

[Reports] Windows keyboard shortcut: Ctrl-R
Macintosh keyboard shortcut: ⌘-R

Click this button to produce reports. You can choose where they are to be printed (e.g. to screen, to a particular printer or to a text file). General details about producing reports can be found in the 'File Menu', 'Report Window' and 'Reports' sections later in this chapter, while the reports themselves are described in detail in the chapters covering the individual modules.

[Settings] Windows keyboard shortcut: Ctrl-S
Macintosh keyboard shortcut: ⌘-S

Settings are used to set operating preferences within FirstContact, to tailor its operations to your requirements. The settings available vary with the different modules. Before you start working with each module, you should consider its settings, since its functions depend on the settings being correct. Many settings take the form of options or preferences. Others require information or a number of records to be entered. Click the button to open the 'Settings' list window where you will find an alphabetical list of the settings that are available in the current module. Double-click an item in this list to add to or change a particular setting. Settings are described individually in the appropriate chapter.

[To Do] This button allows you to organise your diary, providing a means of recording appointments and other tasks. These features are fully described in Chapter 7, 'Activities, To Do and Calendar'.

[Login] Click this button to re-enter FirstContact as a different user.

[Hansaworld.com]

Click this button to connect to the web and go to the Hansaworld website. The latest version of FirstContact is always available for downloading from this site.

Registers These buttons vary according to the current module: one is provided for each register in that module. Separate registers are used for the different types of information stored in and used by the module. Click on a register button to open the browse window for the register. This lists all the records it contains. Each register is explained in the appropriate chapter in this manual.

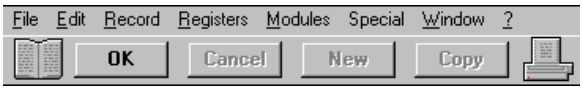
The right-hand area of the Master Control panel shows the contents of your Mailbox. You can read a Mail by double-clicking, and create a new one by clicking the [New] button in the Button Bar. The Mail facilities are fully described in Chapter 6, 'Mail'.

You can set or change your password from the Master Control panel, providing that a record for you already exists in the Person register (the Person register is described in Chapter 8, 'System Module'). Select 'Change Password' from the Special menu. Enter the old password if there is one and then type in the new one twice to ensure that it is correct. Click [OK] to close the window and save: use the close box if you do not want to save changes. The password is case-sensitive.

Disk Space

At the bottom of the screen there are two fields showing the size of your FirstContact database and the amount of disk space available on the hard disk on which it is stored.

Menus and Sub-menus



The Menu Bar

Select menus by pulling them down with the mouse in the normal way. Where appropriate, keyboard shortcuts are shown to the right of the menu items. Some commands are also available as icons in the Button Bar and Master Control panel.

Not all menu items are available at all times. Disabled items are grey or dimmed.

File Menu

The File menu contains commands for the handling of files, documents and printouts. Instead of selecting an item from the menu, you can in some cases click on the corresponding icon in the Master Control panel. The commands on the File menu also all have a keyboard shortcut, shown to the right of each command in the menu, e.g. Ctrl-P (Windows) or ⌘-P (Macintosh) for ‘Print’. These shortcuts are shown in the illustrations above: the Macintosh version is on the left, the Windows version on the right.

Company

This command opens a list for selecting a Company to work with. The Companies listed in the window will have been entered using the Companies register in the System module.

Select a Company to work with and click [OK].

If you need to add a new Company to the list, select 'Open Company Register' from the Special menu while the list is open. Refer to the 'Adding New Companies' section in the previous chapter for full details, but remember that adding a new Company will mean that you will have to apply for a new Enabler key.

Master Control

This function brings the Master Control panel to the front. This will be necessary if you wish to use FirstContact's Mail functions as the Master Control panel provides the only means of accessing these.

Exports

With this command you can copy information from FirstContact into a text file on your hard disk. This data is then available for use in other programs, such as word processors, spreadsheets, database programs etc.

On selecting this command, the 'Exports' list window is opened, where you can select the information to be exported, before clicking [OK]. The options available in the 'Exports' list window vary according to the active module.

One reason to use the 'Exports' function is to back up your FirstContact database. For full details of how to do this, please refer to the 'Safety Back-up' section in the 'Introduction and Installation' chapter. For security reasons, the 'Company Text Backup' and 'Database Text Backup' exports do

not produce text files as described above but encrypted files that can only be read by another copy of FirstContact.

Note that all FirstContact reports can also be printed to disk as text files. This, in combination with the ‘Exports’ function, makes it very easy to get information out of FirstContact for use with other applications.

Imports

This command imports a text file, previously saved in the proper format, into the Company you are working with. Only data that is new will be added during the import process, and there is no danger that you will get duplicate data of any kind into your database.

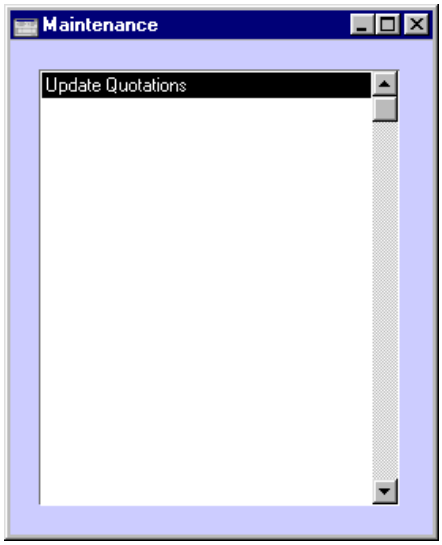
On selecting this command, the ‘Imports’ list window is opened, where you can select the information to be imported, before clicking [OK]. As with the ‘Exports’ list, the options available in the Imports list window vary according to the active module.

The function can import information from another FirstContact database or from a text file created by another computer program. In the latter instance, you should ensure the text file is correctly formatted (contains the information in the correct order) before importing.

The ‘Imports’ function is used to restore your FirstContact database from a back-up. For full details of how to do this, please refer to the ‘Restoring from a Back-up’ section in the ‘Introduction and Installation’ chapter of this manual.

Maintenance

This is used to carry out certain updating tasks, such as removing old Mails. Selecting the function causes a list window to appear, from which the required option can be selected. The options available vary according to the active module. See the chapters covering each module for details of the specific functions.

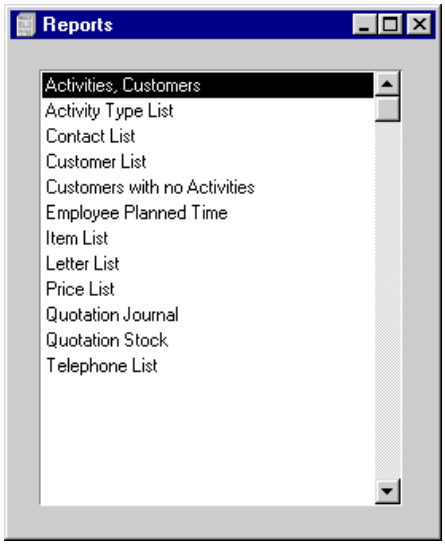


Reports

FirstContact can print **reports** or **documents**. Reports are used mostly in relation to your internal management.

Reporting in FirstContact is non-destructive, i.e. you can make and print a report as many times as you wish. Some programs are designed in such a way as to allow journal printing only directly in connection with the data entry. FirstContact does not have this limitation.

When you select ‘Reports’ from the File menu or from the Master Control panel, a window is opened, containing a list of all available reports. The contents of this window vary with the selected module: the illustration below shows those in the Contact module—



Choose a report by highlighting an item in the list in the Reports window and then consider the options on the Special menu. Click [OK] to print the report.

Selecting a Print Destination

While the list window is on screen, you can choose the destination of the printout by selecting one of the first five items on the Special menu. The available options are Screen, Printer, FirstContact's internal Print Queue (see below), File and Clipboard. If printing to screen (the default setting), you can subsequently send the report to a printer by using the Printer icon in the Button Bar or the 'Print' function on the File menu.

If sending the report to a printer, you can choose whether or not a print dialogue appears. To do so, select 'Printer Dialog' on the Special menu so that a tick (√) appears beside the menu item. You might do this if you want to print several copies of a report. If you need to change the printer which will be used to print the report, choose 'Select Printer' on the Special menu.

If you are using a Macintosh, the 'Select Printer' option can be used to re-direct the report output to the modem port, where you can connect a serial (PC) printer (e.g. a dot matrix printer for printing on pre-printed stock of pin-feed paper).

Page Setup

'Page Setup' on the File menu allows you to set the page size, number of copies and other printer options for the report. These settings will be used

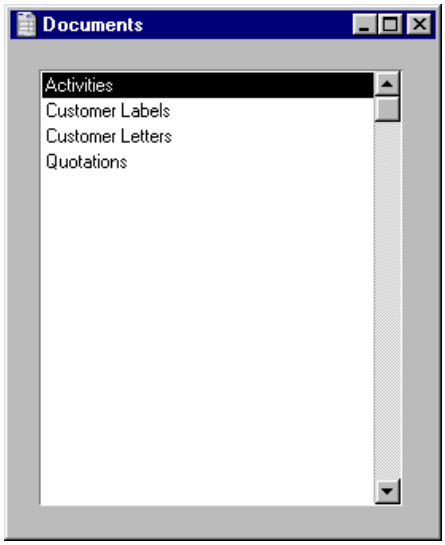
whenever the report is printed. Windows users can also use this function to choose the printer on which the report is to be printed.

Updating Reports

While a report is on screen, it may be that you change some of the information it contains. If so, there is no need to close and recreate the report. Instead, select ‘Recalculate’ on the Special menu to update the report.

Documents

Documents are more formal printouts, usually printed using forms, such as Quotations. They are often directed to third parties. FirstContact offers several documents in each module. Documents cannot be printed to screen or file. The documents available vary with the selected module: the illustration below shows those in the Contact module—



Defining Documents

If there is more than one version of a particular type of document, you can determine when each is to be used using the ‘Define Document’ function on the Special menu. This function is available for all Documents: the example described below imagines that you need to print Quotations on two printers: one containing plain paper and one containing headed paper. You can design the Form which will be used to print Quotations using the Form register in the System module. Full details of this process can be found in Chapter 8, ‘System Module’. In the example, a Form named “QUOTE” will be used.

This is how you specify when each Form is to be used.

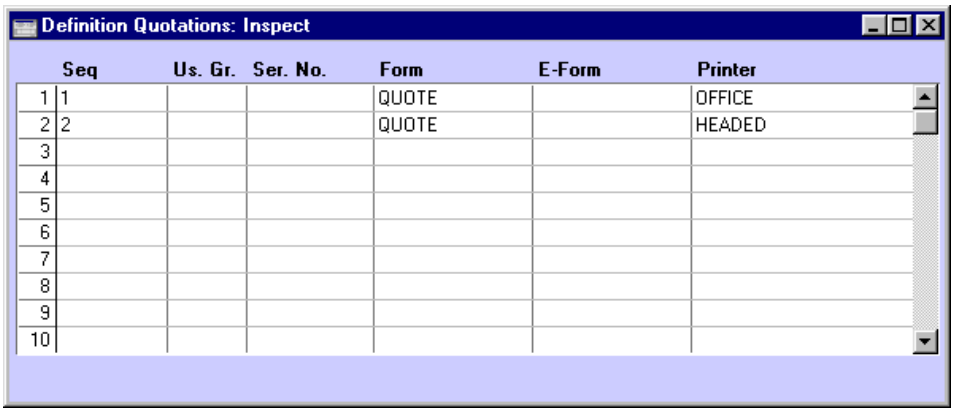
1. Select the Contact module using the Modules menu.

2. Select ‘Documents’ from the File menu. The ‘Documents’ list window is opened showing a list of available documents. Highlight ‘Quotations’.

3. Select ‘Define Document’ from the Special menu. Specify “QUOTE” as the Form on the first and second rows.

4. On the first row, name the Printer that contains the plain paper. On the second row, name the Printer that contains the headed paper. These Printers should be made known to FirstContact using the Printers setting in the System module.

5. Use the Seq. column to specify the order in which each Quotation is to be printed on the two Printers.



For each row you can specify a user group, a sequence number series, a form name and a printer.

Seq This column is used if you want to print two (or more) different documents from a single command. In the example, Quotations are to be printed on plain paper first, so this row has been allocated Seq. no. 1, and Printer with headed paper has been given Seq. no 2.

Us Gr You can assign a particular Form to one user group. When a member of the group prints the document, the system will automatically select the Form assigned to the group. Use ‘Paste Special’ to select from a list of Access Groups as set up in the System module.

Ser No A particular Form can be assigned to a number series, so that Quotations with numbers from that series will be printed using the assigned Form.

Form Enter the Form Code of the relevant Form in this field. This field is case sensitive, i.e. the Form Code must have the right combination of upper case and lower case letters. Use 'Paste Special' to select from a list of Forms as set up in the System module.

Printer Enter a printer code to send the printout to extra printers defined in the System module (use 'Paste Special' to obtain a selection list).

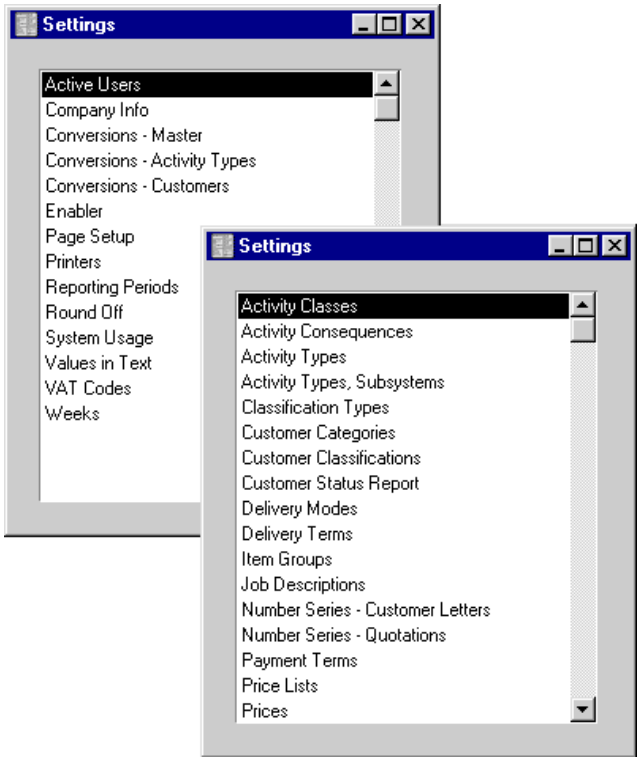
6. Click [OK] to save the Quotation definitions. When printing Quotations from now on, both printers will be used in the correct sequence, without further user intervention.

   This process can be repeated for almost all documents as required.

Settings

This command opens the 'Settings' list window where you will find an alphabetical list of the settings that are available. Settings are used to tailor certain aspects of the program's operation to your requirements, and to supply information to be used throughout the program.

The contents of the 'Settings' list window vary according to the module selected. The illustration below shows the different settings in the System (on the left) and Contact modules.



Choose an entry in the list by double-clicking it, or by selecting it and clicking [OK]. Settings are described in detail in the chapters covering the individual modules.

Page Setup

This function is available when the active (top) window on the screen contains a list of reports or documents.

When a report or document is printed, one copy is usually produced, on a standard page size. If you need to print more than one copy, or to use a non-standard page size or magnification, highlight the desired report or document in the list and then select ‘Page Setup’ from the File menu to make these changes. Once this has been done, click [OK] in the Button Bar or double-click the item in the list to carry on with the printing process.

The number of copies, page size and/or magnification can be set individually in this way for each document or report. These settings will remain permanent until ‘Page Setup’ is chosen once again.

Windows users can also use this function to choose the printer on which the report or document is to be printed.

Print

This function is available when the active (top) window on the screen contains—

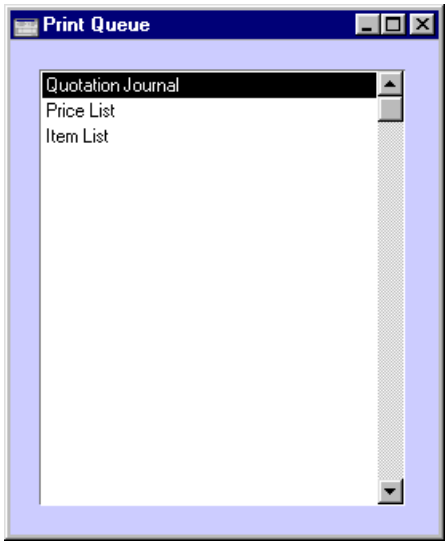
- something that can be printed directly (a screen report, a record that can be printed, such as a Quotation) or
- the contents of the Print Queue.

When you select ‘Print’, the record or the report is printed directly to the selected printer, normally without the Print dialogue box being shown.

This menu item duplicates the functions of the Printer icon at the right of the Button Bar.

Print Queue

You can choose to put your documents or reports in a waiting list so that they can be printed later, perhaps to reduce the load on the network, or to ensure that the printer contains the right paper. In the example below three reports have been put in the queue for later printing.



To place a Report or Document in the Print Queue, select ‘Reports’ or ‘Documents’ on the File menu or click the appropriate button in the Master

Control panel. Choose the required option in the list by clicking once and then select ‘Print Queue’ on the Special menu before clicking [OK].

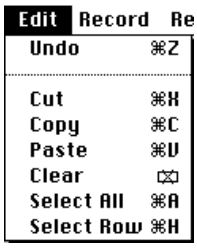
To print the items in the queue, bring up the Print Queue list using the command on the File menu. Click the Printer icon. All the items in the list will be printed in the order in which they are shown.

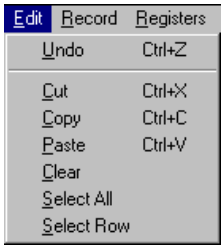
To remove an item from the list, mark it with the mouse and select ‘Clear’ from the Edit menu.

Quit

Quits FirstContact. Remember to take a safety back-up of your work before you quit!

Edit Menu





The commands in this menu are usually used when you are working with the contents of individual fields. If you wish to copy or delete entire records, you should instead use the commands in the Record menu, or the [New] or [Copy] buttons in the Button Bar. If the active window contains nothing editable, the commands will be dimmed. For each command in the Edit menu there is a keyboard shortcut, e.g. Ctrl-Z (Windows) or ⌘-Z (Macintosh) for ‘Undo’. These shortcuts are shown in the illustrations above: the Macintosh version is on the left, the Windows version on the right.

Undo

Select ‘Undo’ to undo your last action.

There are a few actions in FirstContact that cannot be undone, e.g. deleting a record with the ‘Delete’ command on the Record menu. Anything removed using the ‘Clear’ command in the Edit menu also cannot be undone.

Cut

‘Cut’ removes the data you have selected (highlighted) and puts a copy in the Clipboard. The Clipboard is a special part of the computer's memory, used to store a single piece of data temporarily. This data can then be inserted

(Pasted) into another place, once or several times, until you ‘Cut’ or ‘Copy’ something else. That will replace the old contents in the Clipboard.

In certain fields, e.g. the Item or Customer Number fields in records that have already been saved, you may not remove the data, and thus not use ‘Cut’. If you want to make a copy of the field’s contents, use the ‘Copy’ command instead.

Copy

Use ‘Copy’ to copy text or numbers from one field to another without removing the data from the original field. The copy is put in the Clipboard. Then you can ‘Paste’ the copy in as many other locations as required. The copy remains in the Clipboard until you ‘Cut’ or ‘Copy’ something else.

Note that ‘Copy’ (and ‘Cut’) can only be used to copy text from a single field at a time. If you want to copy a whole record in a file, use the ‘Copy’ command in the Record menu (or the [Copy] button in the Button Bar).

Paste

With this command you can insert text or a value that has been cut or copied to the Clipboard. The clipping is inserted at the insertion mark. If you select several characters in the destination field, ‘Paste’ will replace the selected text with the contents of the Clipboard.

Clear

‘Clear’ removes the characters you have selected (highlighted) without copying them to the Clipboard.

The ‘Clear’ command removes text or values within a single field. If you wish to remove an entire record, use the ‘Delete’ command on the Record menu.

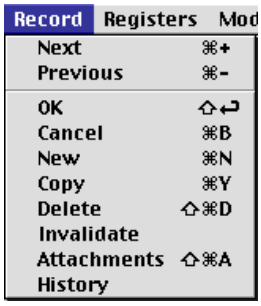
Select All

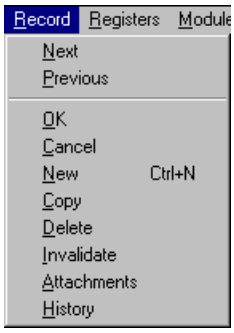
With this command you can select the whole contents of a field. It is used if you are editing a field and want to replace the whole contents with new data.

Select Row

This command is used in screens which contain rows of information, divided into separate columns (or ‘fields’). It allows you to select a whole row. This is the case for the rows in a Quotation. When you choose ‘Select Row’, the row in which the cursor is placed is selected. Clicking the number identifier of the row (on the left) has the same effect.

Record Menu





The Record menu contains the necessary commands to open, enter, change and delete the records in the different registers.

Almost all these commands can also be executed using the buttons in the Button Bar. In addition, there are keyboard shortcuts available for most of them. Commands that cannot be used at a certain point are dimmed in the menu.

The Record menu commands cannot be undone with 'Undo'.

Next

The 'Next' command has the same effect as clicking on the right-hand page of the Book icon on the Button Bar.

- When you work in a **record window**, showing an individual record in a register, 'Next' will take you forward to the next record in that register.
- *It will also save all changes you have made in the record you have just left.*
- When you work in a **browse window**, 'Next' will move forward to the next group (page) of records.
- When you work with a **Report**, 'Next' will scroll to the next page of the report.

Previous

The ‘Previous’ command has the same effect as clicking on the left-hand page of the Book icon on the Button Bar.

The command works in the same way as ‘Next’, but moves backwards instead of forwards. As with ‘Next’, when working in a record window, ‘Previous’ saves all changes you have made in the record you are leaving.

OK

This command is equivalent to pressing the [OK] button in the Button Bar. When used in a record window, it closes the record on screen and saves all changes. When used in a browse window, it opens the selected (highlighted) record for editing.

Cancel

Closes the record on screen without saving any changes. It is equivalent to the [Cancel] button in the Button Bar.

Windows of all types can also be closed using the close box or Ctrl-F4 (Windows) or ⌘-W (Macintosh). When using these methods, you will be asked if you wish to save changes.

New

Use this command when you need to create a new record. It can only be used after you have selected a register using one of the buttons in the third row of the Master Control panel or the Registers menu.

It opens a blank window into which you can enter the new record. On clicking [OK], the record will be saved into the register concerned. On clicking [New] again, the record will be saved and a new blank window opened, enabling you to enter another new record in the same register. On clicking [Cancel], the record will be closed but not saved.

Copy

Copies a record so that you can re-use all the information when you create a similar record. The copy is opened in a window marked ‘New’. In many cases, dates in the new record will be changed to show the current date.

You can copy a record either from the record window, showing the record to be copied, or from the browse window, in which the record to be copied has been highlighted with the mouse.

Delete

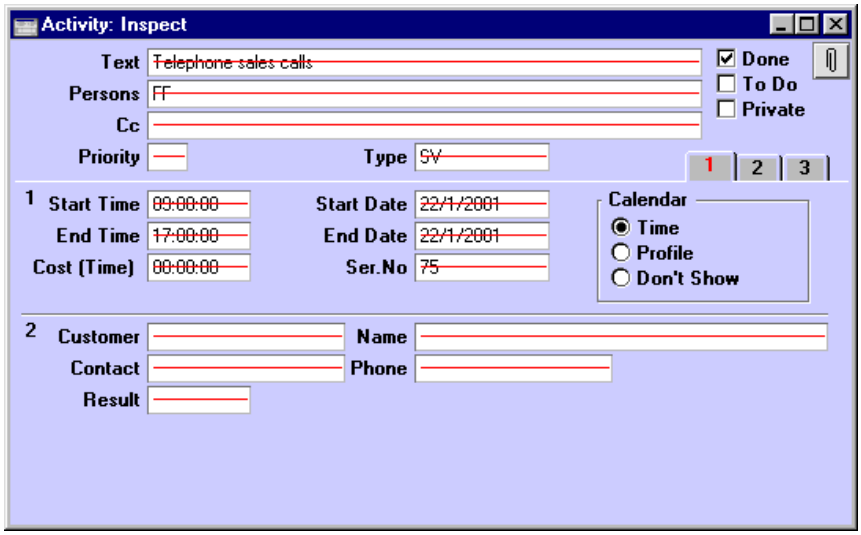
Use this command to delete, i.e. remove, an existing record. You must open a record in the record window to be able to delete it.

When a record is deleted, the next record in the register is displayed.

Remember that you cannot undo the deletion of a record.

Invalidate

This function can only be used when an Activity is open in a record window (see below). Once an Activity has been marked as Done and saved, the To Do and Private boxes, the Start and End Dates and Times and the Calendar options 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, To Do List and all reports. Then click the [Copy] button in the Button Bar to create a new Activity without the mistake. Activities, the Calendar and the To Do List are described in Chapter 7, 'Activities, To Do and Calendar'.



The invalidation of an Activity cannot be reversed.

Attachments

This menu command allows you to connect files, notes or other records to any record in FirstContact. These connected objects are known as “Attachments”. Please refer to the section later in this chapter entitled ‘Working with Records’ for full details.

A record must be open in a record window before you can attach objects to it.

History

This function allows you to view the change history of a particular record.

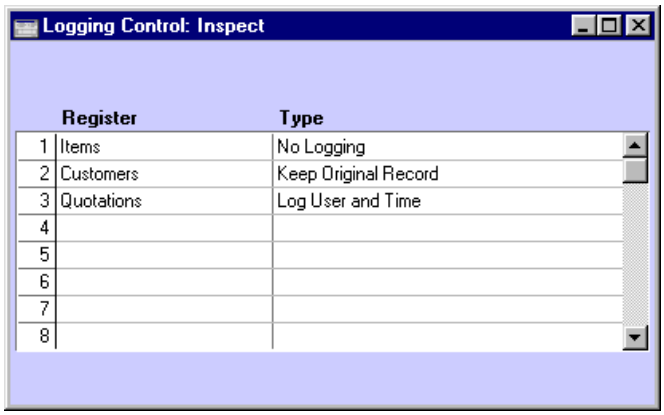
To use this function, you must first instruct FirstContact to store the change histories of records. To do this, follow these steps—

1. Select ‘Technics’ from the Modules menu. In multi-user systems, this should be done on the server machine only, when no other user is logged in. To gain access to the Modules menu, select ‘Quit, Remove Autoserver’ from the File menu and restart FirstContact.

   If ‘Technics’ is not available on the Modules menu, this might be because you are not using the server machine, or, in a single-user system, because you have not granted yourself access to the Server module in the System Usage setting.

2. Choose ‘Settings’ from the File menu. In the ‘Settings’ list, double-click ‘Logging Control’.

3. The ‘Logging Control: Inspect’ window opens—



   Use the grid to tell FirstContact the registers for which you wish to keep a history of the changes made to each record. No history will be kept for

registers not listed in the grid. Note that maintaining record histories will cause the size of the database to grow quickly.

4. In the Register column, use ‘Paste Special’ (described later in this chapter) to select the register for which a history is to be kept.

5. In the Type column, use ‘Paste Special’ to select an option, as follows—

No Logging No change history will be kept.

Log User and Time

Whenever a record in the register is created or modified, the history will show the date and time this happened and the initials of the Person responsible.

Keep Original Record

Again, the history will show the date and time each record was created or modified and the initials of the Person responsible. In addition, the original version of each record will be kept (i.e. the record as it was when it was saved for the first time).

6. Click the [OK] button in the Button Bar to save the Logging Control setting.

7. Quit and restart FirstContact.

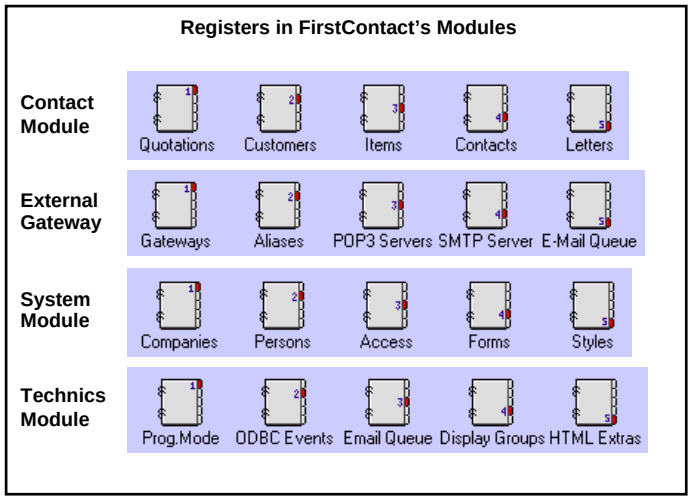
Once this has been done, to view the change history of a record, first open that record in a record window. Then, select ‘History’ from the Record menu. A list of the dates and times of modifications to the record appears: this can be printed by clicking the Printer icon. If you are using the ‘Keep Original Record’ option, double-click a date in the report to open the original version of the record.

The Registers

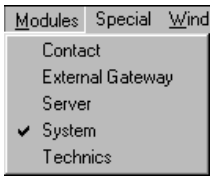
FirstContact consists of a number of modules, each with a number of Registers or Files, in which your data is stored. Each module has a different set of registers, accessible through the Registers menu. The following illustration shows the registers available in each module. The exact contents and the use of each register is explained in the chapters of this manual covering the individual modules.

To work with a register (for example, if you need to enter a new Quotation), first go into the appropriate module using the Modules menu and then click the relevant register button in the third row of the Master Control panel or

select from the Registers menu. A browse window will open, listing all the existing records in the register (in this example, all Quotations). Then, click [New] in the Button Bar and a blank record window will appear in which you can enter a new record.

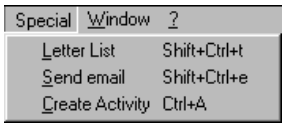


Modules Menu



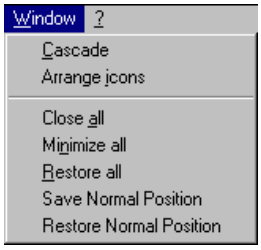
The Modules menu and the Modules window are used to select the part of FirstContact you wish to work with. To change the module you are working in, use the Modules menu or the keyboard shortcut Alt-M (Windows) or ⌘-0 (Macintosh). With the resulting list on the screen, you may select the module you want by entering its first letter on the keyboard, such as T for the Technics module, then press Enter.

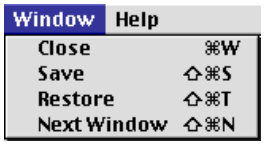
Special Menu



The Special menu appears with certain screens only. Its contents change according the screen shown and are specific to that screen. Full details can be found in the chapters covering each module elsewhere in this manual.

Window Menu





Use this menu to manage your windows, including closing them and arranging them on screen. 'Save Normal Position' (Windows)/'Save' (Macintosh) and 'Restore Normal Position'(Windows)/'Restore' (Macintosh) allow you to save a particular setting for an individual window. 'Save Normal Position' will save the position and size of the window, together with the sort order you have selected in Browse or Paste windows, while 'Restore Normal Position' will return the setting of the window to standard.

Although the 'Close All' function is not available to Macintosh users, clicking the close box of a window while holding down the Alt key will have the same effect.

About FirstContact

This command on the ? menu (Windows) or the Apple menu (Macintosh) shows the copyright information for FirstContact. The version of the program and information about the owner of the program license are also shown here. You return to the program by clicking [OK].

Windows

FirstContact allows you to work with several windows on the screen at the same time. The window that is currently in use is known as the ‘active window’. That is the uppermost window, where the title bar is not dimmed.

In the Windows version you can “Iconise” a window, i.e. shrink it to an icon on the screen, by clicking the button in the top right hand corner of a window. The window can be reopened by clicking the symbol again.

You can move the active window by dragging the title bar, and change its size by dragging the size box in the bottom right-hand corner. Close the window with the close box. On the Macintosh, clicking the close box of a window while holding down the Alt key will close all windows. In addition, you save attributes such as size and position for a particular window using the Window menu (Windows only).

! ***FirstContact allows you to have up to 100 windows open at the same time. It is however a good habit to close a window when it is no longer needed. Too many open windows may become confusing.***

There are six types of window.

Browse Window

The browse window displays a list of records and shows the word ‘Browse’ in its heading. Clicking a register button in the third row of the Master Control panel will open a browse window showing all records stored in that register. It can be used to search for a certain record and to select a specific record for processing. You can have several different browse windows open at any time.

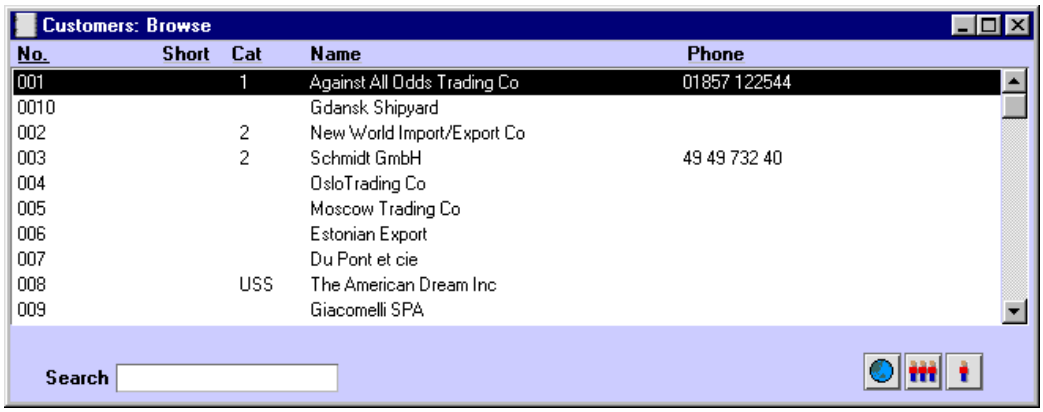
For example, if you click the [Items] button in the Master Control panel while working in the Contact module (or select ‘Items’ from the Registers menu), the window that opens is a browse window. The window contains a list of all Items in the register.

You can scroll through the list using the scroll bar to the right. You can move up or down a screen at a time using the Book icon or the ‘Next’ or ‘Previous’ items on the Record menu.

The list can be sorted by one of the columns. Click the heading of the column you want to sort by, and the list will re-sort immediately. The heading of the column will be underlined to show the selected sort order. If you click on the heading a second time, the sort order will be reversed.

You can search for a record by typing a letter, word, number, or date in the Search field in the lower left corner of the browse window. Then press Enter or click [OK]. FirstContact will search the column by which the list is sorted for a match. The first row beginning with an exact match (or, if there is no exact match, with the nearest match) will be highlighted. If you are not certain of the exact spelling, use the * character as a wildcard. For example, in the illustration shown above, to find Cassette Tapes but are not sure of the exact name, sort the list by the Description column and type “*Tapes” in the Search field.

Some browse windows have three buttons in the bottom right-hand corner—



These buttons can be used if the Limited Access feature is being used, as follows—

Lists all records in the register.

Lists records belonging to members of the same Sales Group as the current user (i.e. records whose Sales Group field is the same as that of the current user).

Lists records belonging to the current user (i.e. records whose Person field contains the initials of the current user).

It is also possible to prevent a user from seeing all records in the register by restricting their view to their own records or to those of their Sales Group.

Please refer to the section describing the Person register in the 'System Module' chapter later in this manual for full details of the Limited Access feature.

Choose one of the following methods when you want to work with a specific record—

- Open the record by double-clicking its line in the window, or by first selecting the line and then clicking [OK] or pressing the Enter key.
- Open a new, empty record with the [New] button in the Button Bar.
- Open a new record by selecting a record in the list and clicking [Copy] in the Button Bar. The resulting new record is a copy of the record you selected, and saves you the trouble of re-entering data that may already

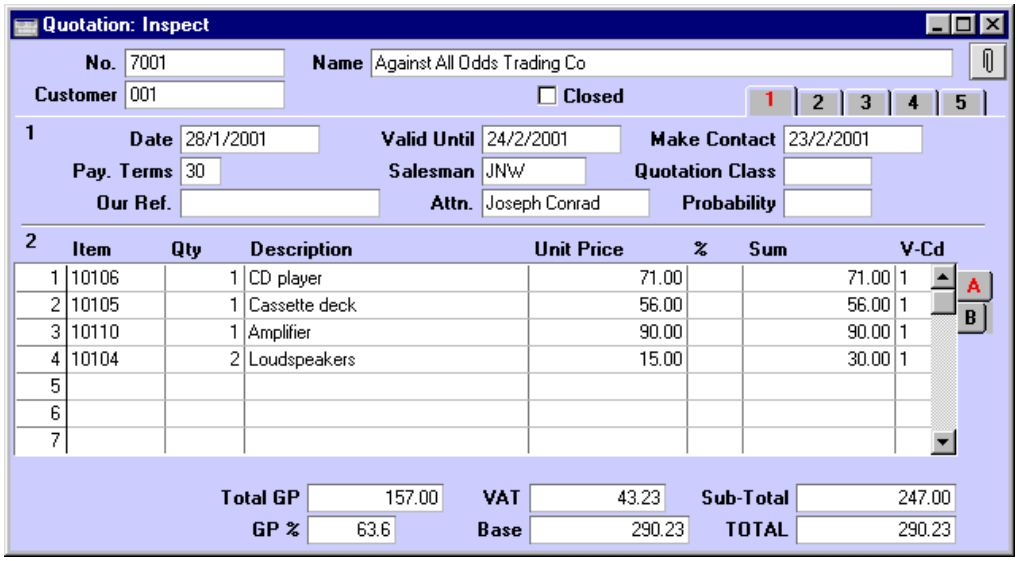
be there. In many cases, the new record will show the current date, not the date of the copied record.

It is not possible to delete a record directly from the browse window. The record must first be opened.

Record Windows

The record window shows individual records. The heading may read ‘New’, ‘Inspect’, ‘Update’ or ‘Remove’, depending on the task. All data entry to FirstContact is made in windows of this type.

A record window is shown when you open a specific record from a browse window or create a new record. Below is the window that is opened when you double-click a row in the ‘Quotations: Browse’ window.



The record window is where you enter or edit information. Note that certain fields will only accept numbers or uppercase letters, while others cannot be changed at all. In some cases, all characters will be converted to uppercase automatically. You move from field to field with the Return key or the arrow keys. The Return key moves the cursor to the next relevant field, while the arrow keys move to the next field, whether it can be changed or not.

You can also click directly in the field to enter or change its data. When you click in a field, its contents will be highlighted, and the contents will be

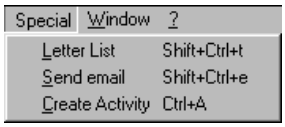
replaced by the next character entered. If you click twice in the same field, the insertion point will be placed at the point where you click, and you can enter or delete characters.

Some record windows, such as that in the illustration, are divided into two: the top half shows details of the parent record (in this case, a Quotation) and the lower half contains the individual items (or rows) that are listed on that Quotation.

Sometimes a record window contains more information than can be shown on screen at once. If this is the case, there will be a series of tabs (marked '1', '2', '3', etc) which can be clicked to show further pages of data about the parent record. There may also be a series of flips (marked 'A', 'B', 'C', etc) which can be clicked to show more information for the rows.

The Special Menu

In several record windows, such as those for Quotations and Customer Letters, and some browse windows, there is a Special menu available, with different functions according to the register currently being used. For the Customer Letter record, the following menu items are available—

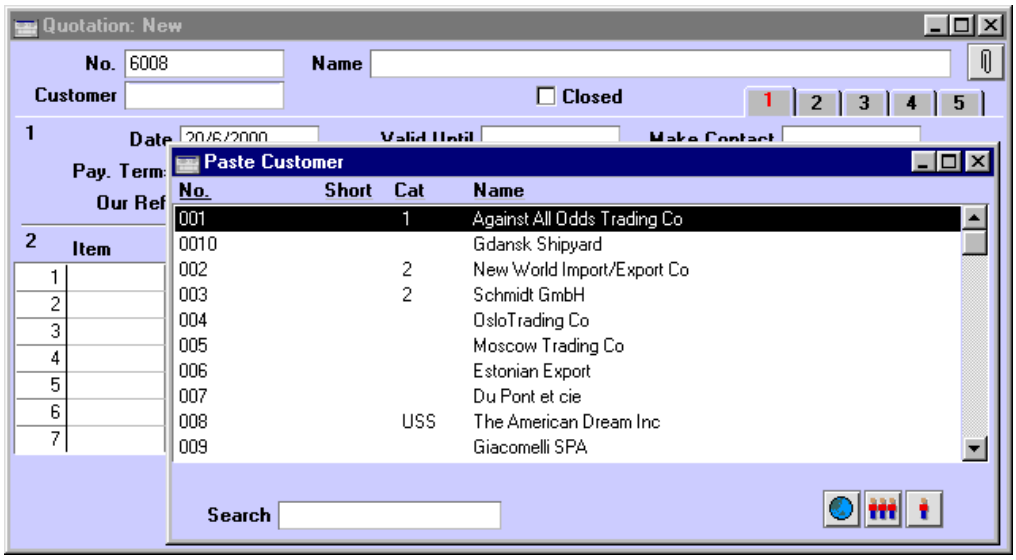


'Letter List' lists the recipients of the Letter. 'Send email' allows you to send the Letter to all recipients by email, and 'Create Activity' creates a record in the Activity register that is linked to the Customer Letter.

Paste Special

When you enter information in FirstContact, you frequently need to refer to another register or setting. For example, when entering a Quotation, the Customer Number is used to refer to information (the name and address of the Customer) stored in the Customer register, while the Salesman field refers to data in the Person register. With the 'Paste Special' command you can quickly and easily find out the information you require from a selection list. Pressing Ctrl-Return or Ctrl-Enter in a field activates the Paste Special feature. Macintosh users can press ⌘-Return or ⌘-Enter.

The following example shows pasting a Customer Number into a Quotation.



With the cursor placed in the Customer field, press the Ctrl-Enter (Windows) or ⌘-Enter (Macintosh) key combination. A new window will open, showing the contents of the register or setting from which you can select a record (in this case, the Customer register). This window is similar to a browse window in its behaviour, so you can sort the list by any of the columns by clicking the column heading and use the Search field to find the record you are looking for (using the * wildcard if necessary).

Select the Customer you want by double-clicking or by highlighting and pressing Enter. The Customer Number and other details are transferred to the Quotation screen.

If the record you are looking for is not available, you can often enter it on the fly. In the ‘Paste Special’ window, press Ctrl-N or ⌘-N. A new Customer screen (in this example) is shown. Enter the new Customer, click [OK] and the new record is saved. At the same time, the Customer Number is entered in the Quotation.

If you are entering a Quotation and realise that your information about the Customer is out of date (they might have changed their address or telephone number, for example), highlight the Customer in the ‘Paste Special’ window and press F2 (Windows) or ⌘-Shift-V (Macintosh). The Customer record is opened, allowing the changes to be made. You can also do this if the Customer Number has already been entered to the Quotation. With the cursor in the Customer Number field, press F2 or ⌘-Shift-V. This feature is available from any field with a ‘Paste Special’ link.

'Paste Special' can also be used when you are in a date field. Simply press Ctrl-Enter or ⌘-Enter and the current date is entered straight away.

Drag and Drop

An alternative method for linking information in different registers or settings is available: drag and drop. Information can be dragged from the browse window of one register into the record window of another. For example, a Customer Number can be dragged from the 'Customers: Browse' window into a Quotation. With both the 'Customers: Browse' and 'Quotation: New' windows open, find the correct Customer in the list, click on the Customer Number and drag it to the Customer Number field of the Quotation. Items and information from settings such as Payment Terms can be added to any field with a 'Paste Special' link in the same manner.

If you have several Companies, information can be transferred from one Company to another by dragging and dropping between browse windows. For example, when a new Company is created, you can drag all the Items from the 'Items: Browse' window of an existing Company to that of the new Company. This makes it easy to transfer basic information to the new Company.

The Book

You can go to the next or previous record using the Book icon or the 'Next' or 'Previous' items on the Record menu.

! ***When you go from one record to another in this way, all the changes in the current record that you may have made are saved. If you want to cancel the changes, close the record window with the close box or press the [Cancel] button in the Button Bar.***

Attachments

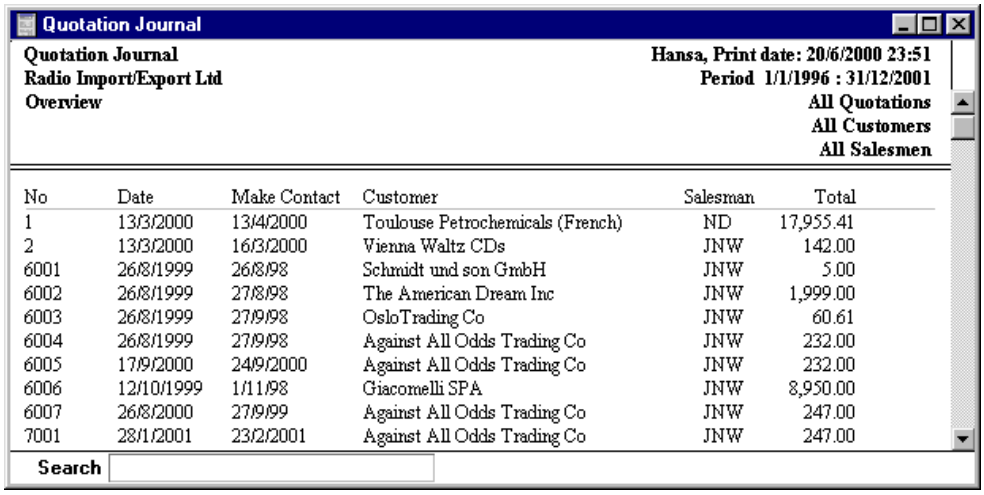
All record windows contain an [Attachments] button, which can take one of two forms—

This button allows you to connect files, notes or other records to any record in FirstContact. These connected objects are known as "Attachments". Please

refer to the section later in this chapter entitled ‘Working with Records’ for full details.

Report Window

The report window is used to display the reports you print to the screen. Below we show an example of a Quotation Journal report produced from the Contact module. You can scroll up and down in the window, and search for information in the report.



No	Date	Make Contact	Customer	Salesman	Total
1	13/3/2000	13/4/2000	Toulouse Petrochemicals (French)	ND	17,955.41
2	13/3/2000	16/3/2000	Vienna Waltz CDs	JNW	142.00
6001	26/8/1999	26/8/98	Schmidt und son GmbH	JNW	5.00
6002	26/8/1999	27/8/98	The American Dream Inc	JNW	1,999.00
6003	26/8/1999	27/9/98	OsloTrading Co	JNW	60.61
6004	26/8/1999	27/9/98	Against All Odds Trading Co	JNW	232.00
6005	17/9/2000	24/9/2000	Against All Odds Trading Co	JNW	232.00
6006	12/10/1999	1/11/98	Giacomelli SPA	JNW	8,950.00
6007	26/8/2000	27/9/99	Against All Odds Trading Co	JNW	247.00
7001	28/1/2001	23/2/2001	Against All Odds Trading Co	JNW	247.00

At the top of the report window there is a report header, showing the name of the report and the selection on which it is based. This is important information, since all reports can be produced using different selections.

Below this is the report, always shown to its full width in its own window. You can change the window’s height and width, which may lead to the report not fitting in the window. You can therefore scroll the window up and down with the scroll bar to the right. If the window is too narrow, the report is compressed sideways, which may make it hard to read. By increasing the width of the window the report can be made to expand.

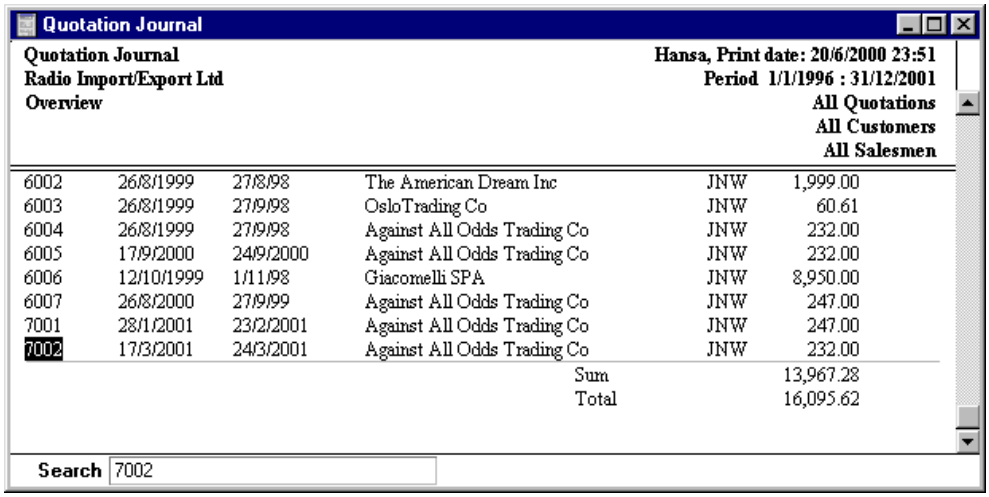
Since each report is shown in its own window, several reports can be put on the screen at the same time, totally independently. There is no limit for the number of reports shown simultaneously on the screen, and reports from the different modules may be mixed freely. Since FirstContact's windows are completely independent, report windows can be mixed with data entry windows and lists from different parts of the system.

Printouts

All reports are printed by clicking the Printer icon in the Button Bar. The page format is set in advance for each report so that the report will fit in a portrait or landscape page.

Searching in Reports

Another useful function built in to all FirstContact's reports is the option to search for a text string in a report. The search string may contain any combination of letters and digits occurring in the report.



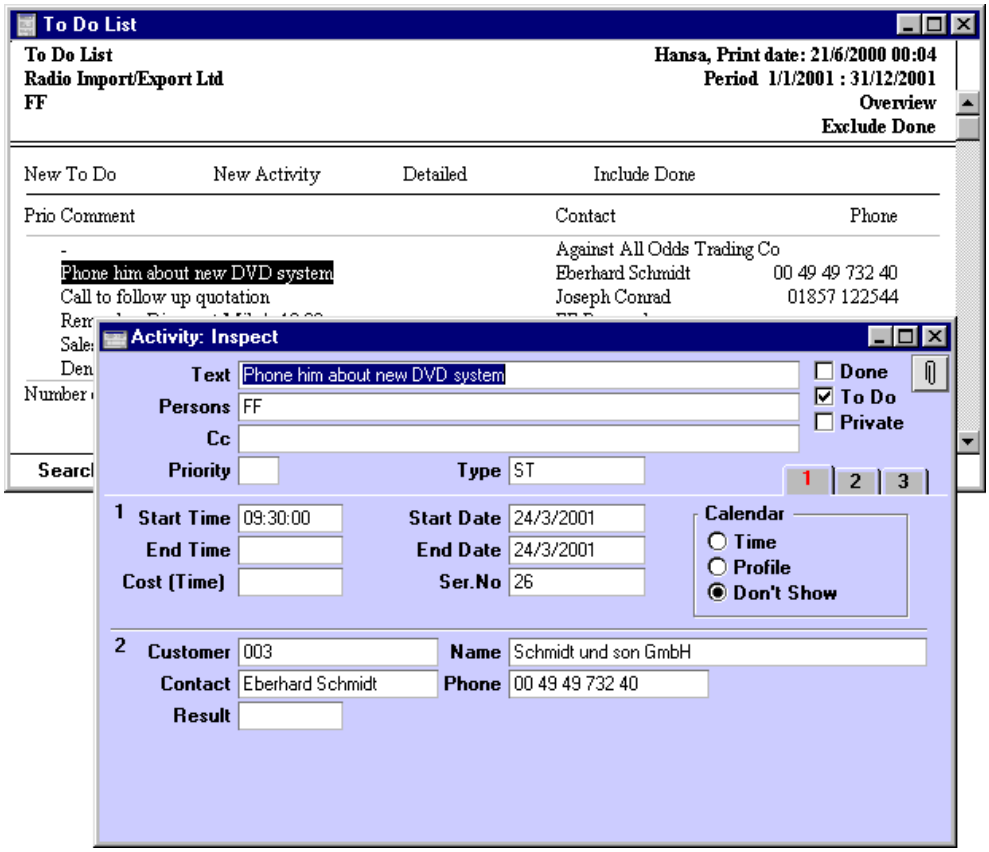
In this example you might want to search for the Quotation 7002. Enter “7002” into the Search field in the bottom left-hand corner of the report window and press the Enter key. FirstContact will search for the first text string in the report that matches the search word, scroll the report to the position where the text was found, and highlight the text. Pressing the Enter key again repeats the process finding the next match.

Recalculating reports

All reports are shown in their own windows. You can leave a report on the screen and go to other windows to do various additions and alterations. If such alterations change the contents of the report, there is a simple shortcut for updating the report. With the report window active again - activate it by clicking in it - the Special menu is available in the menu bar. Select the ‘Recalculate’ command to produce an updated version of the report, using the same specifications.

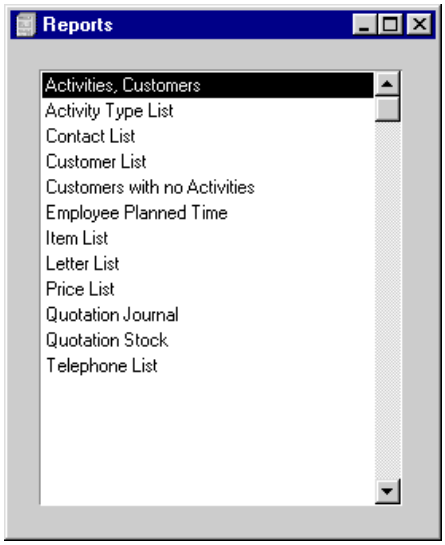
Drill-down

FirstContact has a unique drill-down feature in some reports when they are printed to screen. When you for example have a To Do List report on the screen, you can double-click on any of the Comments in the report. The Activity record will open, showing all the details recorded for the event. The following picture shows the result of the above example.



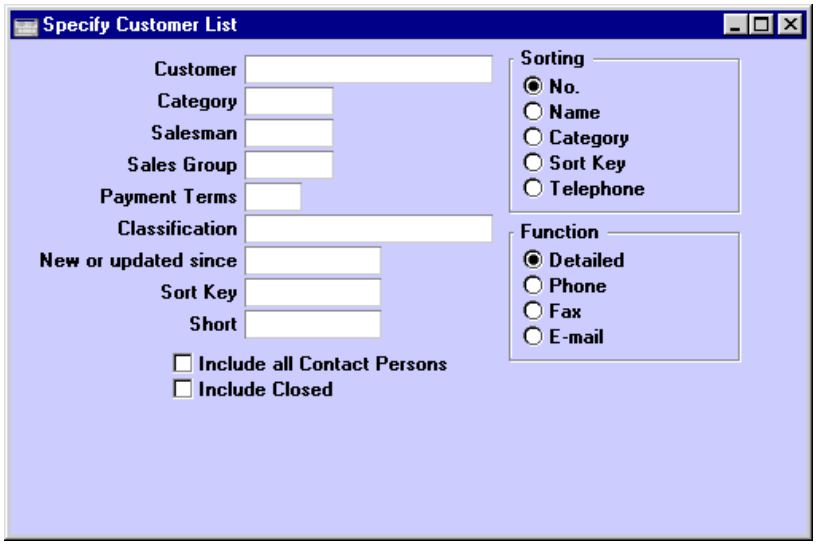
List Window

The list window is used whenever it is necessary to choose from a list of options, usually after accessing the ‘Settings’, ‘Maintenance’, ‘Reports’ and ‘Documents’ functions. Select your choice with the mouse and then click [OK]. In many cases, especially when selecting reports and documents, the list window is accompanied by a Special menu allowing you to specify, for example, whether a report is to be sent to printer or screen. The following example shows the window from which you select reports in the Contact module.



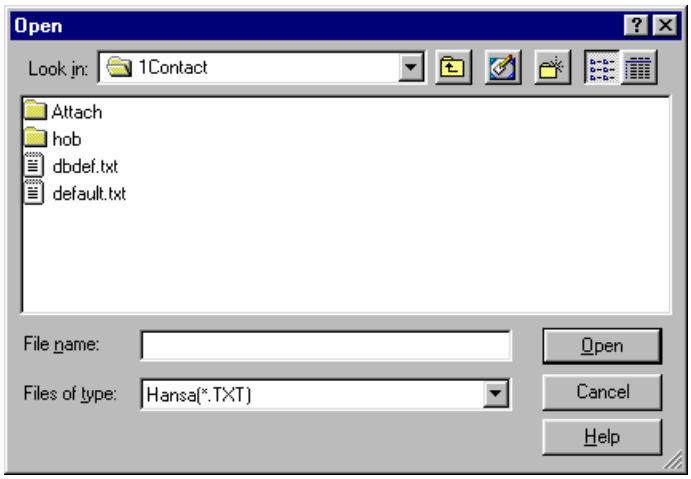
Specification Window

The specification window allows you to specify the contents of a report or document, or the records to be affected by a Maintenance function. Its appearance often follows the selection of an option in a list window. Once it has been considered, click [OK]. The example below shows the specification window for the Customer List report.



File Dialogue Window

FirstContact uses the standard Windows or Macintosh file dialogue window when it requires you to select a file for import, or to give a file name to an export file.



Working with Records

Current Record

When you wish to work with a particular record, you may open its record window using one of the following methods. All methods give the same result.

- Double-click the record in a browse window.
- Select the record in a browse window and click [OK] on the Button Bar.
- Select the record in a Browse Window and press Enter.

With the record opened in a record window, you can edit all fields in the usual way. Some fields may be locked due to relations to other functions in the program. If this is the case, FirstContact will tell you.

New Record

You can create a new record from a browse window or a record window. To create a new record do one of the following—

- Click [New] on the Button Bar.
- Select ‘New’ from the Record menu.

A blank record is opened in a record window.

Copy Record

You may copy a record from a browse window or a record window. Select the record you want to copy and -

- Click [Copy] in the Button Bar, or
- Select ‘Copy’ from the Record menu.

A new record is created. Relevant data from the original record is transferred, and you only need to enter some of the fields. In many cases, date fields will not be copied, but instead will be given new values.

Delete Record

1. Open the record window for the record you want to delete.
2. Select ‘Delete’ in the Record menu.

! ***You cannot undo the deletion of a record.***

It is not possible to delete a record directly from a browse window. The record must first be opened.

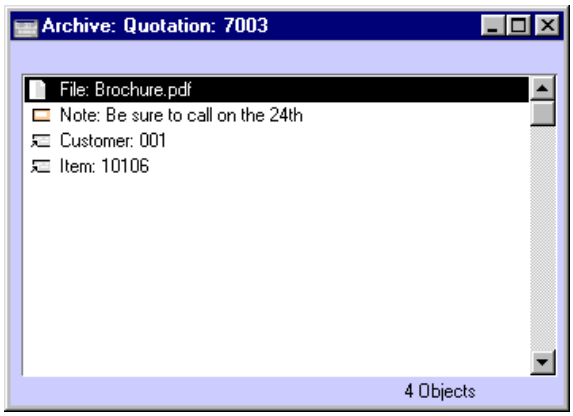
Attachments

You can connect files, notes or other records to any record in FirstContact. These connected objects are known as “Attachments”.

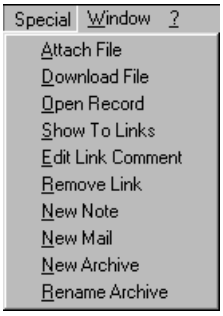
All record windows contain an [Attachments] button—

If the record already has an Attachment, the button shows this by having a different icon—

Click this button to work with Attachments (or select ‘Attachments’ from the Record menu). A list of objects currently attached to the record is opened—



This list has its own Special menu, which contains the functions necessary to attach, view and remove Attachments—



In the case of records whose unique identifying codes are not generated automatically (e.g. the Item Number of Items), these codes must be typed in and the record saved before Attachments are added.

Attaching Files to Records

To attach a file to a record, open the record in question and click the [Attachments] button. Select 'Attach File' from the Special menu. An 'Open File' dialogue box will open, allowing you to locate the file to be attached. Find the file and click [Open]. The file will be attached to the record. Its filename will appear in the list of Attachments with the prefix "File:". You can attach as many files as you like to a single record.

The 'Attach File' function attaches a file to a record by copying the file into a folder called "Attach" that is in the same folder as your FirstContact application. In multi-user systems, the "Attach" folder should be on the server. This means that you will still be able to download and read the attached file, even after the original has been deleted. If you want to attach a large file to a record, make sure (using the disk space indicator in the bottom right-hand corner of the FirstContact window) that the hard disk containing your FirstContact application has sufficient space. As the file is uploaded to the server, a progress indicator appears in the bottom left-hand corner of the FirstContact window.

! ***The "Attach" folder must be present in the folder containing your FirstContact application if you want to attach files to records. Do not rename any of the files in the "Attach" folder.***

Reading Files

A file that has been attached to a record can be read in one of three ways. Whichever method is used, a ‘Save File’ dialogue box is opened, asking you where the file is to be saved.

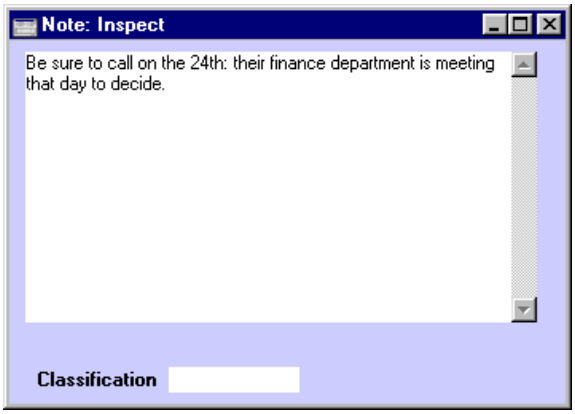
1. By double-clicking on the file in the list of Attachments. When the file has been saved to your hard disk, your default browser will be opened so that the file can be opened using the appropriate helper application.

2. By clicking on the file in the list of Attachments and selecting ‘Download File’ from the Special menu. The file is saved to your hard disk, but no attempt is made to open it using a helper application.

3. By clicking on the file in the list of Attachments and clicking the [OK] button.

Attaching Notes or Comments to Records

You can attach notes or comments to records. To do this, open the record in question and click the [Attachments] button. Select ‘New Note’ from the Special menu. A window will open, where you can type in your comment.



Click [OK] to save. The note will appear in the list of Attachments with the prefix “Note:”. If you want to identify the note with a name, refer to the section below entitled ‘Changing the Names of Attachments’. You can attach as many notes as you like to a single record.

Reading and Changing Notes

A note or comment that has been attached to a record can be read in one of two ways—

1. By clicking on the note in the list of Attachments and clicking the [OK] button; and

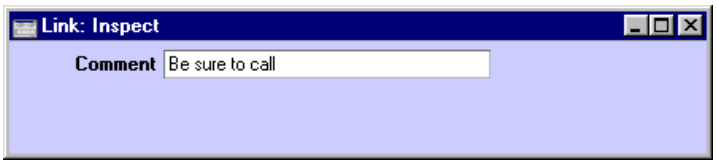
2. By double-clicking on the note in the list of Attachments.

Whichever method is used, the note is opened in its own window where it can be read or edited.

Changing the Names of Attachments

When a file is attached to a record, its file name will be shown in the list of attachments. When a note is attached to a record, it is not immediately given its own name in the list.

If you want to rename a file or note, highlight it in the list of Attachments and select ‘Edit Link Comment’ from the Special menu. A window opens where you can type in a new name.

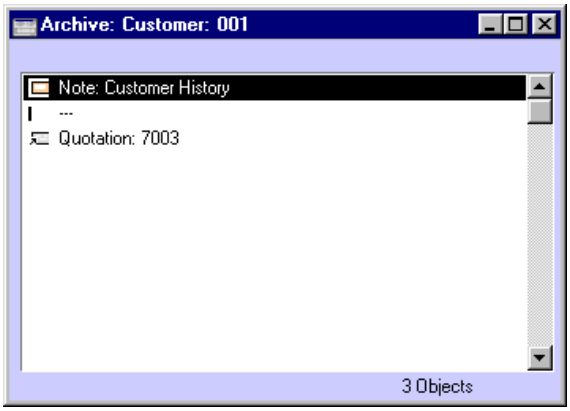


Click [OK] to save and close the window, or [Cancel] if you don't want to save changes. You may have to close and re-open the list of Attachments for the change to take effect.

Attaching Records to Other Records

You can attach records to other records by dragging and dropping from the browse window of one register onto the [Attachments] button of another. For example, to attach a Customer record to a Quotation, open the Quotation in a record window and then open the ‘Customers: Browse’ window. Find the correct Customer in the list, click on the Customer Number and drag it to the [Attachments] button of the Quotation. The Customer record will then appear in the Quotation’s list of attachments.

Later, when viewing the Customer record in the example above, you might wish to see which other records it has been attached to. Open the list of Attachments and select ‘Show To Links’ from the Special menu. The records the Customer has been attached to will be listed below a dotted line.



Viewing Attached Records

A record that has been attached to another record can be read in one of three ways—

1. By clicking on the file in the list of Attachments and selecting ‘Open Record’ from the Special menu;

2. By clicking on the record in the list of Attachments and clicking the [OK] button; and

3. By double-clicking on the record in the list of Attachments.

Whichever method is used, the linked record is opened in its own window where it can be read or edited in the usual manner.

Removing Attachments

To remove an attachment of any kind from a record, highlight it in the list of Attachments and select ‘Remove Link’ from the Special menu.

Attaching Records to Mails

Records can be attached to Mails in one of two ways—

1. Where the Mail already exists, the record can be dragged from its browse window to the [Attachments] button of the Mail, as described in the ‘Attaching Records to Other Records’ section above.

2. Where the Mail does not exist, open the record and click its [Attachments] button. Select ‘New Mail’ from the Special menu. A new Mail is opened. Complete the Mail in the usual way and save. The record will be attached to the Mail automatically, and the recipient of the Mail

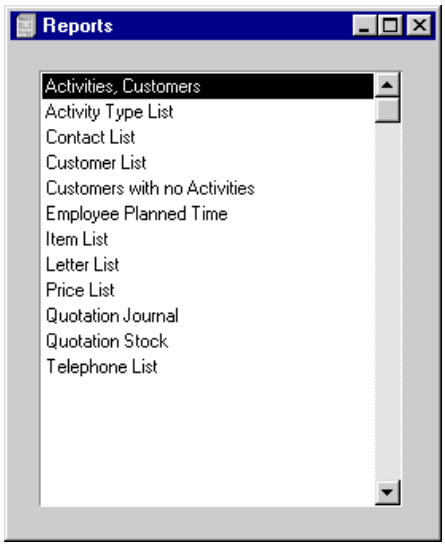
will be open the record as described in the ‘Viewing Attached Records’ section above.

Remember that Mails themselves are records. Therefore Mails can be attached to other Mails or to other records. Every feature described in this section applies to Mails as much as to other records.

Mails are fully described in Chapter 6, ‘Mail’.

Reports

Each module of FirstContact can produce a number of reports. Activate the reports with the ‘Reports’ command on the File menu, or by clicking [Reports] in the Master Control panel. This opens the following list window.



Select a report in the list, click [OK], specify the composition of the report in the subsequent specification window and click [OK] again. By default, a report is produced in its own window on the screen.

Export to other applications

It is very easy to export the contents of any report to another application program, e.g. Excel or Word. The list window where you order a report has a Special menu, on which one item is ‘File’. If selected, instead of being printed to screen, the report is saved as a tab-separated text file on your hard disk. This can be used directly in Excel, for further calculations etc.

Keyboard Shortcuts

Menu	Function	Windows	Macintosh
File Menu	Company	Ctrl-O	⌘-O
	Master Control	Ctrl-M	⌘-M
	Exports	Ctrl-E	⌘-E
	Imports		⌘-Shift-I
	Reports	Ctrl-R	⌘-R
	Documents	Ctrl-D	⌘-D
	Settings	Ctrl-S	⌘-S
	Print (Printer Icon)	Ctrl-P	⌘-P
	Print Queue		⌘-T
	Quit	Alt-F4	⌘-Q
Edit Menu	Undo	Ctrl-Z	⌘-Z
	Cut	Ctrl-X	⌘-X
	Copy	Ctrl-C	⌘-C
	Paste	Ctrl-V	⌘-V
	Select All		⌘-A
	Select Row		⌘-H
Record Menu	Next (Next Page in Book Icon)	PgDn	⌘-+
	Prev (Prev. Page in Book Icon)	PgUp	⌘--
	OK ([OK] button)	Shift-Enter	Shift-Enter
	New ([New] button)	Ctrl-N	⌘-N
	Copy ([Copy] button)	Ctrl-K	⌘-Y
	Delete		⌘-Shift-D
	Attachments		⌘-Shift-A
Registers Menu		Ctrl-1 to 5	⌘-1 to 5
Window Menu	Save Normal Position		⌘-Shift-S
	Restore Normal Position		⌘-Shift-T
Browse Window	Sort Column	Ctrl-Shift-	⌘-Alt-
			-highlighted letter
Record Window	OK check box on/off	Ctrl-Shift-O	⌘-Alt-O
	Change Tabs	Ctrl-Shift-1 to 5	⌘-Alt-1 to 5
	Change Flips	Ctrl-Shift-A to B	⌘-Alt-A to B
	Paste Special	Ctrl-Return	⌘-Return
Other	Modify Linked Record	F2	⌘-Shift-V
	Close Window	Ctrl-F4	⌘-W
	Close All Windows	Use Window menu	Alt-Close Box
	Change Window	Ctrl-Tab	⌘-Shift-N

FirstContact Customers

Chapter 3: Customers

Information about your Customers is stored in the Customer register and is made available to the Quotation and Activity registers.

Customers of a similar type can be grouped together using Customer Categories. All Customers of the same Category can be given the same default Price List, saving you the work of having to specify these for all Customers individually. Defining and assigning Customer Categories also makes modification easier: if it is necessary to assign a different Price List, only one change need be made (to the Customer Category), rather than many (to each of the Customers).

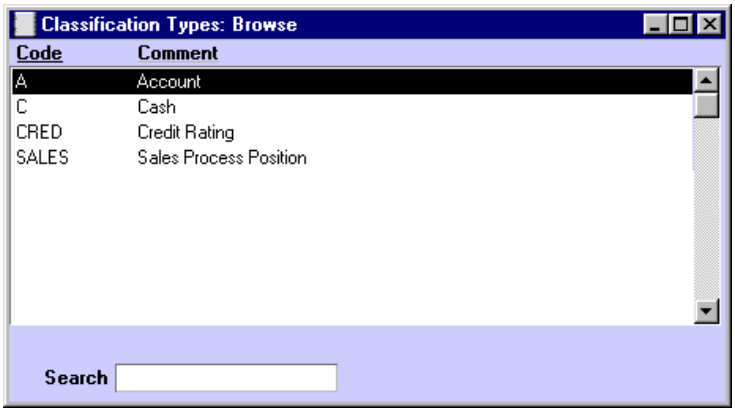
If information is specified both for a Customer Category and for a Customer that belongs to that Category, that entered for the Customer will take precedence.

This chapter first describes the defining of Customer Categories and Classifications. This is followed by a detailed description of the Customer register and of Customer-related reports.

Settings

Classification Types

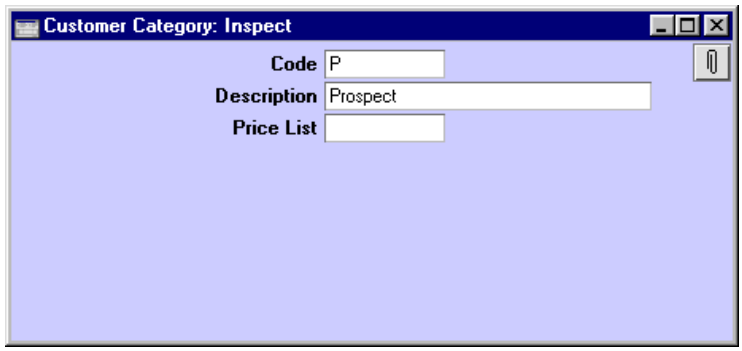
Classification Types are used to divide the Customer Classifications (described below) into groups.



Use the Modules menu to enter the Contact module and then select 'Settings' from the File menu or click [Settings] in the Master Control panel. Double-click 'Classification Types' in the resulting list. 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 [OK] to save the new record.

Customer Categories

Customer Categories are defined using the setting in the Contact module. Use the Modules menu to enter the Contact module and then select 'Settings' from the File menu or click [Settings] in the Master Control panel. Double-click 'Customer Categories' in the resulting list. Then click [New] to open a new record, or double-click an existing record to modify it.



Code — Specify a unique code, by which the Customer Category may be identified from the Customer screen and elsewhere in FirstContact.

Description — Enter text describing the Customer Category here.

Price List

Paste Special — Price Lists setting, Contact module

Used as default in — Customers, Quotations

The Price List entered here determines the prices used in Quotations for all Customers belonging to this Category. Price Lists are described in the next chapter, 'Items and Pricing'.

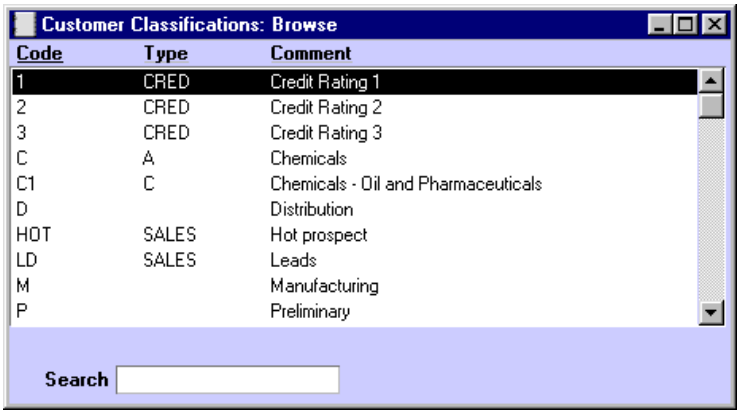
Customer Classifications

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, retail customer, etc). This is done using the Class. field on card 1 of the Customer 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 described above. 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.

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



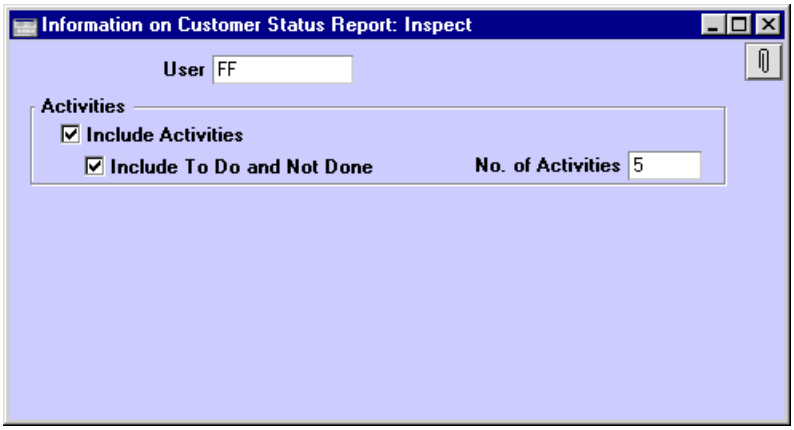
Use the Modules menu to enter the Contact module and then select ‘Settings’ from the File menu or click [Settings] in the Master Control panel. Double-click ‘Customer Classifications’ in the resulting list. The ‘Customer Classifications: Browse’ window lists the available Customer Classifications: to 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 [OK] to save the new record. ‘Paste Special’ can be used from the Classification Type field to bring up an option list.

Customer Status Report

This setting is used to control the appearance of the Customer Status Report, which is produced using the 'Customer Status' Special menu function of the 'Customers: Browse' or 'Customer: Inspect' windows. The report is a quick way of looking at the most recent Activites for a particular Customer. This setting is used to specify which Activities are to be included in the report, and how many. A separate record can be saved in this setting for each Person, so each user can configure the report to their particular requirements.

Use the Modules menu to enter the Contact module and then select 'Settings' from the File menu or click [Settings] in the Master Control panel. Double-click 'Customer Status Report' in the resulting list. The 'Information on Customer Status Report: Browse' window opens, listing the report configuration records entered so far. 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 [Copy].

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. FirstContact will prevent you from entering more than one record for a particular Person.

Include Activities Ensure this box is checked in each record. This will cause Done Activities to be included whenever the user in qurestion produces a Customer Status report.

Include To Do and Not Done

If To Do Activities and those that are not Done are to be included as well, check this box.

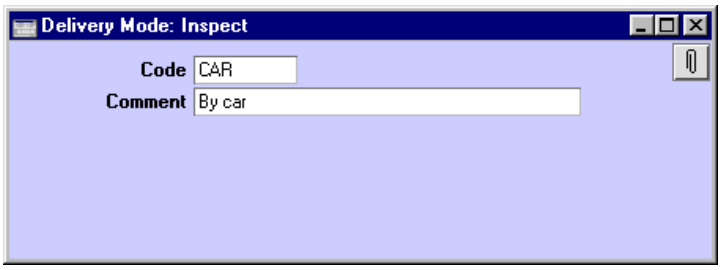
No. of Activities Specify here how many Activities are to be shown in the report when produced by the Person in question. The most recent Activities will be shown. Leave the field blank to list all Activities.

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

Delivery Modes

The Delivery Modes setting is used to define the various delivery methods that are used. Examples might be Post or Courier, or might specify the name of one of the couriers that you use. These can be accessed using 'Paste Special' from the Customer register.

Use the Modules menu to enter the Contact module and then select 'Settings' from the File menu or click [Settings] in the Master Control panel. Double-click 'Delivery Modes' in the resulting list. The 'Delivery Modes: Browse' window opens, listing the available Delivery Modes: double-click to modify or click [New] to create a new item.



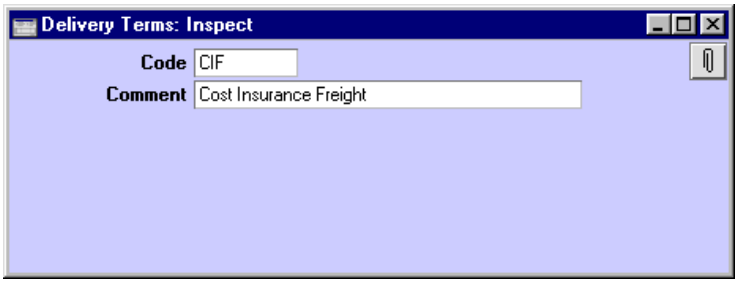
Enter a code and a short descriptive text for each Delivery Mode. The code may contain up to five characters, and you may freely mix letters and numbers.

Confirm the entry by clicking [OK].

Delivery Terms

In this setting you can enter the different shipping terms you wish to use, such as FOB (Free On Board) and CIF (Cost, Insurance, Freight). Usually these will be used for international Customers, and are specified on card 2 of each Customer record.

Use the Modules menu to enter the Contact module and then select ‘Settings’ from the File menu or click [Settings] in the Master Control panel. Double-click ‘Delivery Terms’ in the resulting list. The ‘Delivery Terms: Browse’ window opens, listing the available Delivery Terms: double-click to modify or click [New] to create a new item.



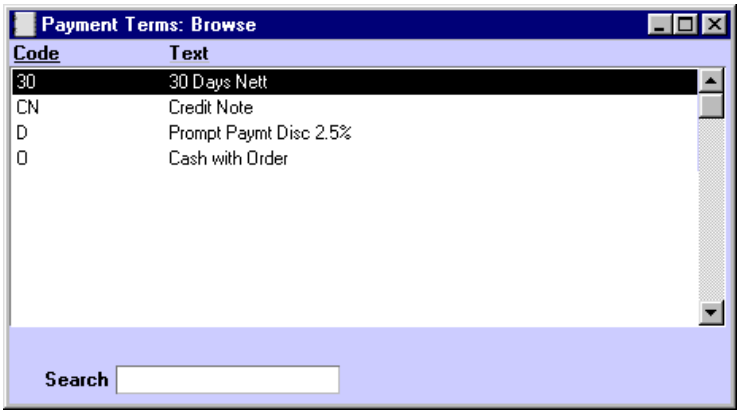
Enter a code and a short descriptive text for each Delivery Term. The code may contain up to five characters, and you may freely mix letters and numbers.

Confirm the entry by clicking [OK].

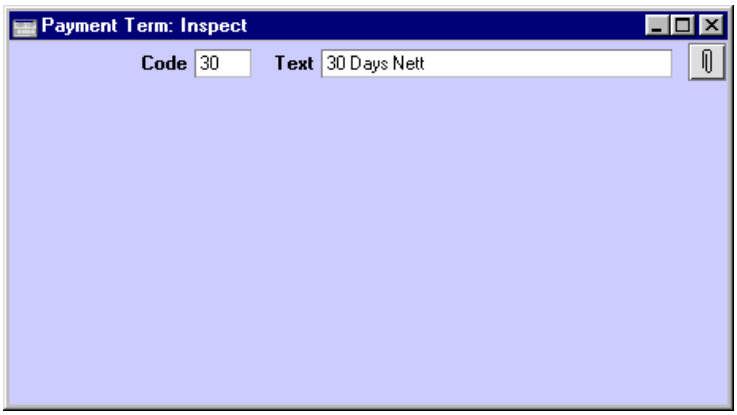
Payment Terms

Different Quotations can be assigned different terms for payment: last date for payment, Cash or Credit Note etc.

Use the Modules menu to enter the Contact module and then select ‘Settings’ from the File menu or click [Settings] in the Master Control panel. Double-click ‘Payment Terms’ in the resulting list. The ‘Payment Terms: Browse’ window is opened, showing all Payment Terms previously entered.



Double-click a Payment Term in the list to edit it, or add a new term by clicking the [New] button in the Button Bar.



Code Enter the unique code by which the Payment Terms record is to be identified from elsewhere in FirstContact. The Code may consist of one or two characters, and both numbers and letters can be used.

Text Here you enter the name for the Payment Term as it will be shown in the ‘Payment Terms: Browse’ window and the ‘Paste Special’ list.

The Customer Register

The Customer register is where you store information about your Customers and assign Customer Categories and Payment Terms. It can be opened from the Contact module. Use the Modules menu to enter this module and select ‘Customers’ from the Registers menu, or click the [Customers] button in the Master Control panel.

The ‘Customers: Browse’ window is opened, showing all Customers already entered.

The buttons in the bottom right-hand corner are part of the Limited Access feature, and can be used as follows—

Lists all Customers.

Lists Customers belonging to members of the same Sales Group as the current user (i.e. those whose Sales Group field on card 3 is the same as that of the current user).

Lists Customers belonging to the current user (i.e. those whose Salesman field on card 3 contains the initials of the current user).

It is also possible to prevent a user from seeing all Customers in the list by restricting their view to their own Customers or to those of their Sales Group.

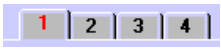
Please refer to the section describing the Person register in Chapter 8, ‘System Module’, for full details of the Limited Access feature.

Entering a Customer

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

The ‘Customer: New’ window is shown, empty if you clicked [New] or with a copy of the copied Customer. Complete the Customer record as appropriate, then save it using the [OK] button and close the window by clicking the close box. Then, close the browse window using the close box again.

Since the amount of information stored about each Customer will not fit in a single window, the Customer screen has been divided into four cards. At the top of each is the header. This contains the Customer Number, Short Code, Customer Category, Name and Department. There are four numbered buttons (‘tabs’) in the header.



By clicking the tabs you can navigate between cards. The header is always visible, as a reminder of the Customer you are working with.

Below, the Customer screen is described field by field. The entry of Customer information often requires reference using ‘Paste Special’ to settings entered in the Contact or System modules. Where use of ‘Paste Special’ is appropriate, this is indicated in the text together with the module in which the setting is to be found. Descriptions of these settings can be found earlier in this chapter and in Chapter 8, ‘System Module’.

Header

No. Enter the unique code you are assigning to this Customer. The field holds up to 20 letters and/or numbers. FirstContact offers a default based on the Customer Number of the previous Customer entered. Once the record has been saved, the Customer Number may not be changed. It is the means by which this Customer will be identified elsewhere in FirstContact.

Short This field can be used as an alternative means of identifying this Customer - information entered here appears in the Short column in the 'Customers: Browse' window. Firms of a similar nature could be given the same Short Code so that they would be grouped together in the 'Customers: Browse' window when sorted by the Code column. The field holds up to ten letters and/or numbers.

Category

Paste Special Customer Categories setting, Contact module

Used as default in Quotations

Enter the Customer Category to which this Customer belongs. Customer Categories enable you to classify similar Customers together. All Customers of the same Category can use the same default Price List, saving you the work of having to specify these for each Customer individually.

Name Enter the Name of the Customer.

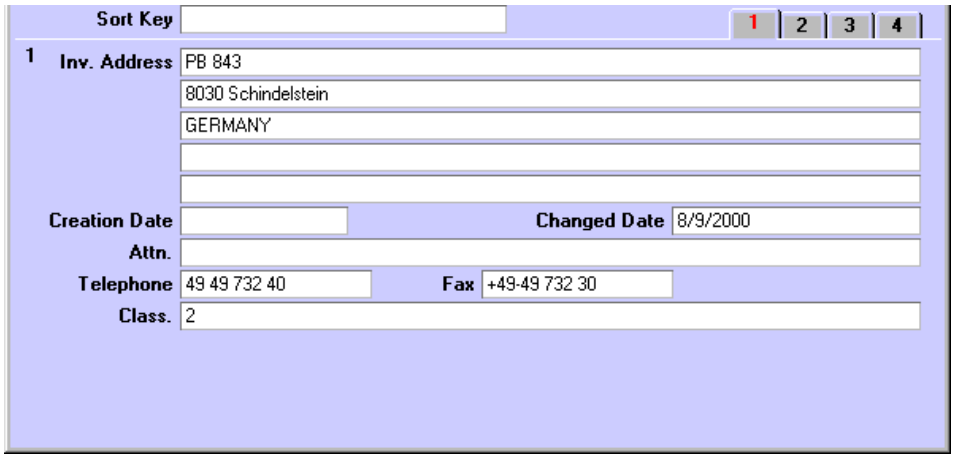
Sort Key This field can be used in countries where a post code, zip code or other area code appears on a separate line in an address. Note that, if the field is used for this purpose, it will need to appear on the standard Forms (e.g. Quotation). Therefore, the models supplied with FirstContact will need to be modified accordingly using the Form register in the System module.

The buttons in the top right-hand corner of the header can be used as follows—

Opens a new Quotation record in the name of the Customer. Quotations are fully described in Chapter 5.

Opens a new Mail which can be sent to the Customer by email. The Customer must have an Email Address specified on card 4, the record must be saved and the current user must have a Mailbox, otherwise the 'Mail: New' window will not be opened. To send Mails to Customers, the External Gateway module must be in use, and the E-Mail SMTP Server setting must be configured. Please refer to Chapter 6, 'Mail', for full details of FirstContact's mailing facilities.

Card 1



Inv. Address

Used as default in Quotations

Enter here the address to which Quotations are to be sent.

Creation Date

This field automatically records when this Customer was added to your FirstContact database. It cannot be changed by the user.

The Customer List report (described later in this chapter) can be used to list Customers that were added or changed after a certain date.

Changed Date

This field is updated automatically by FirstContact whenever any modification is made to the Customer record on screen.

Attn.

Paste Special Contact Person register, Contact module

Used as default in Quotations, Activities

The name of your main contact person can be entered here: it will be transferred as a default entry whenever this Customer is used in a Quotation or Activity. The 'Paste Special' selection list will only show contact names for the Customer in question (identified by Customer Number). If you need to add more contact names, use the 'New Contact' function on the Special menu.

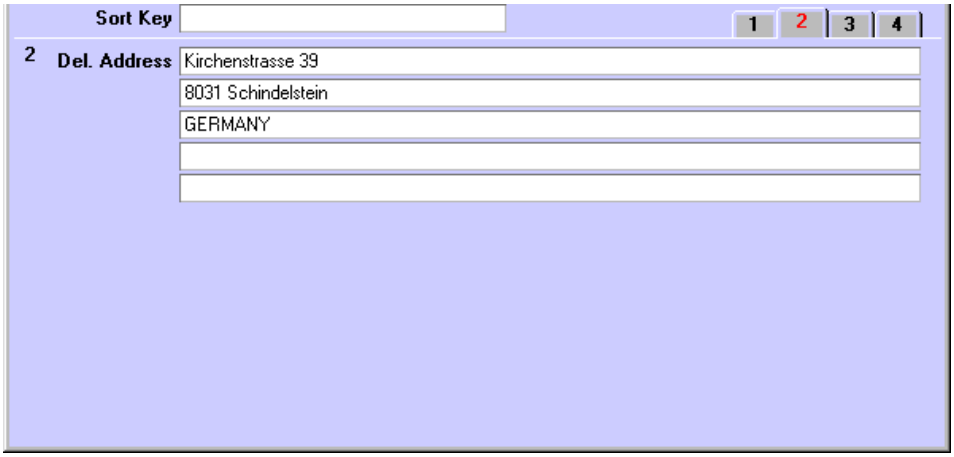
Telephone, Fax Enter the Customer's main telephone and fax number here. Extensions, direct line numbers and e-mail addresses for each contact should be recorded in the Contact Person register.

If you are using the FirstContact Fax Server, the fax number will be used when faxing documents to this Customer.

Class. **Paste Special** Customer Classifications setting, Contact module

This field provides a further means of grouping Customers of a similar type together. It can be used as a reporting criterion in many FirstContact reports. It is possible to allocate more than one Classification to each Customer, separated by commas.

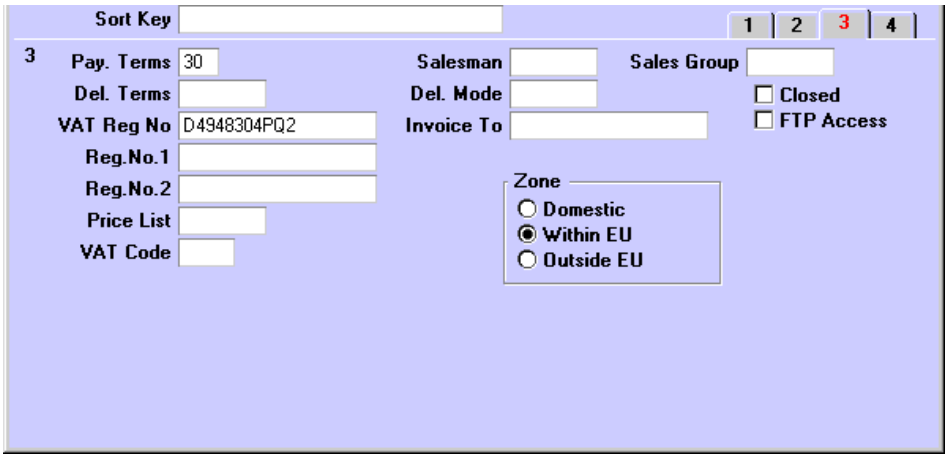
Card 2



Del. Address **Used as a default in** Quotations

Specify the Customer's usual delivery address here.

Card 3



Pay. Terms

Paste Special Payment Terms setting, Contact module

Used as default in Quotations

Specify here the Payment Terms that your company offers to this Customer.

Salesman

Paste Special Person register, System module

Used as default in Quotations

Enter the initials of the salesman responsible for this Customer's account. By default, Quotations for this Customer will be attributed to the salesman entered here.

This field is also used by the Limited Access feature: please refer to the description of the Sales Group field (below) for details.

Sales Group

Default taken from Salesman

The Sales Group is brought in from the Person record after you have entered a Salesman. If the Limited Access feature is being used, this field can be used to prevent a user from seeing all Customers in the 'Customers: Browse' and Customer 'Paste Special' windows by restricting their view to their own Customers or to those of their Sales Group.

Please refer to the section describing the Person register in the 'System Module' chapter later in this manual for full details of the Limited Access feature.

Del. Terms **Paste Special** Delivery Terms setting, Contact module

Specify the Delivery Terms for this Customer here. You will tend to use this field for international Customers: examples might be Cost, Insurance, Freight or Free On Board.

Del. Mode **Paste Special** Delivery Modes setting, Contact module

Enter the mode of shipping most commonly used for this Customer. Examples might be Post or Courier, or might specify the name of one of the couriers that you use.

Closed Check this box if the Customer is no longer to be used (you might not want to delete Customer records if Quotations have been issued to them). Closed Customers will appear in the 'Customers: Browse' window but not in the Customers 'Paste Special' list. You will not be able to enter Quotations for closed Customers. A closed Customer can be re-opened at any time.

FTP Access If you are using the FirstContact FTP facility and wish to allow this Customer access to your FTP server, check this box. They will use their Customer Number as a Login ID, and you can allocate them a password using the 'Change Password' function on the Special menu of the 'Customers: Browse' window.

You must be using the Limited Access feature if you want Customers to be able to log on to your FTP Server.

VAT Reg No It is important that the Customer's VAT Number is recorded here if they are in the "Within EU" Zone as this information is required for EU VAT reporting purposes. A check is made when the record is saved that the VAT Number has not been used for any other Customer.

Invoice To **Paste Special** Customer register

If the Customer does not pay Invoices themselves but may, for example, use a leasing company, enter the Customer Number of that company here (that company must also be in the Customer register).

Reg. No. 1 If the Customer is a limited company, enter their Company Registration Number here.

Reg. No. 2 This field is used in Finland, where companies have two registration numbers.

Price List

Paste Special Price Lists setting, Contact module

Used as default in Quotations

If you wish to assign a particular Price List to a Customer, you can do so here. It will determine the prices used in Quotations issued to this Customer.

Note that it is also possible to allocate Price Lists to Customer Categories. This makes it easy to allocate or change the Price List of a group or Customers in a single step. Any Price List specified here will override that of the Customer Category (if any) to which the Customer belongs.

Please refer to the 'Price List' section in Chapter 4, 'Items and Pricing' for full details of how to use Price Lists.

VAT Code

Paste Special VAT Codes setting, System module

The VAT Code entered here refers to a VAT Code record entered using the VAT Codes setting in the System module. It determines the rate at which VAT will be quoted to this Customer.

When creating Quotations for this Customer, in determining which VAT Code is to be used, that entered here will be overridden by the VAT Code specified for the Item(s).

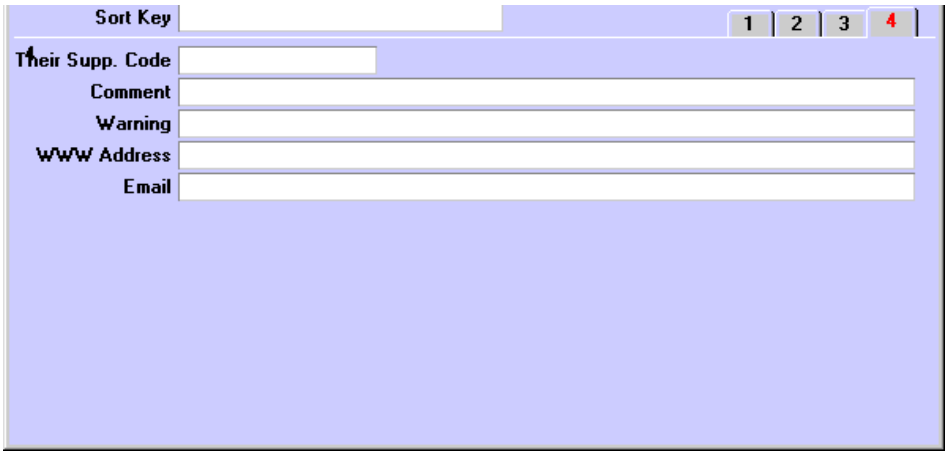
Zone

Used as default in Quotations

Select a Zone for this Customer. This will be used in Quotations to control VAT calculation.

For Customers in the "Within EU" Zone, it is important that their VAT Number is recorded (see above).

Card 4



Their Supp. Code Enter the Supplier Number allocated to your firm by this Customer. It can be printed on documents.

Comment This field can be used to record any additional information about the Customer.

Warning Text entered here will be used to alert users whenever a Quotation is entered for this Customer.

WWW Address If the Customer has a website, enter its address (URL) here.

Email If the Customer has an email address, enter it here. This field must contain a value before you can send the Customer an Email by clicking the button with the Envelope icon in the header.

Editing a Customer

The Customer register must be kept up to date, so it will need editing from time to time.

In the 'Customers: Browse' window which appears when the Customer register is opened, the Customers are initially shown in Customer Number order. You can change the sort order by clicking on one of the headings. The underlined heading shows the current sort order.

To search for a specific Customer, enter the text to be found in the Search field in the bottom left-hand corner of the window and press Return. The text should be such that it would appear in the current sort column: to search by

Company Name, for example, sort by Company Name before entering a Company Name (or its initial letters) to the Search field.

To modify a Customer's record, double-click on the line in the browse window. That record will be opened in a window entitled 'Customer: Inspect'. The fields in this window are the same as those in the 'Customer: New' window: please refer to the previous section for a detailed description of each field.

Edit the fields as necessary. Move from field to field with the Return key, or with the arrow keys. Click [OK] when you have finished, to save changes.

Deleting a Customer

Select and open the Customer record in the same way as for editing. Select 'Delete' from the Record menu. The Customer is deleted.

You cannot undo the deletion of a Customer record.

Special Menu

The Special menus for Customers are shown above. On the left is that for the 'Customers: Browse' window: highlight a Customer in the list before selecting the function. You can also apply the function to a group of Customers: highlight the first Customer 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 'Customer: New' and 'Customer: Inspect' windows.

Customer Status

This function produces a Customer Status report, listing Activities for the Customer currently on screen or for those Customers highlighted in the browse window.

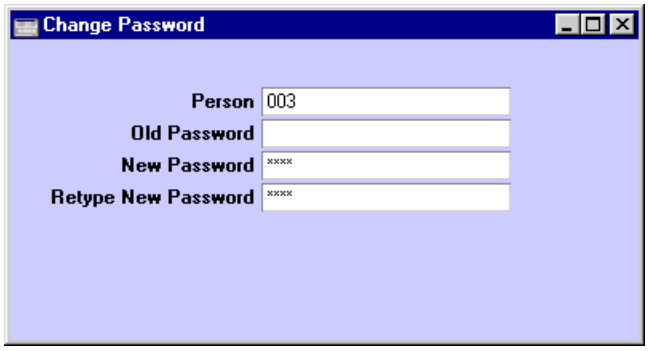
The information is shown in the report is controlled by the Customer Status Report setting in the Contact module: different users can have different report definitions. This is described earlier in this chapter.

The Customer Status report has FirstContact's Drill-down feature. Double-click on the Activity Number of any Activity in the report to open that Activity record.

Change Password

If you are using the FirstContact FTP facility and wish to allow Customers access to your FTP server, you should use this function to give them passwords. Such Customers should also have the FTP Access box on card 3 of their Customer records checked. They will use their Customer Number as a Login ID.

To set a password for a Customer, highlight their name in the 'Customers: Browse' window and select 'Change Password' from the Special menu. The following window is opened—

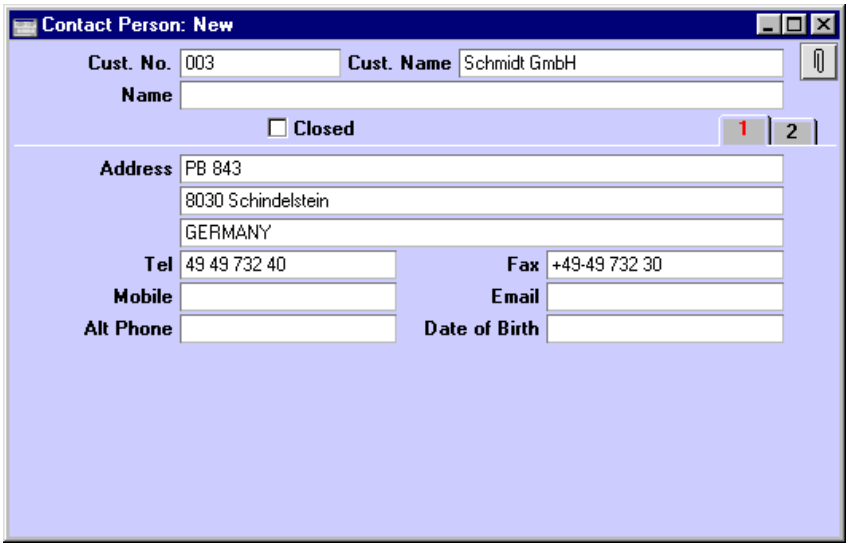


Enter the old password if there is one and then type in the new one twice to ensure that it is correct. Click [OK] to close the window and save: use the close box if you do not want to save changes. The password is case-sensitive.

New Contact

This function can be used to create records in the Contact Person register in the Contact module, allowing you to add to the list of contact names for this Customer.

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



A new record is opened in a window entitled ‘Contact Person: New’. This means that it has not yet been saved. The Customer Number and Name are brought in automatically. After adding the person’s name and making other changes as necessary, save the record in the Contact Person register by clicking the [OK] button in the Button Bar and close it using the close box. Alternatively, if you no longer require the record, click [Cancel]. In either case, you will be returned to the Customer window.

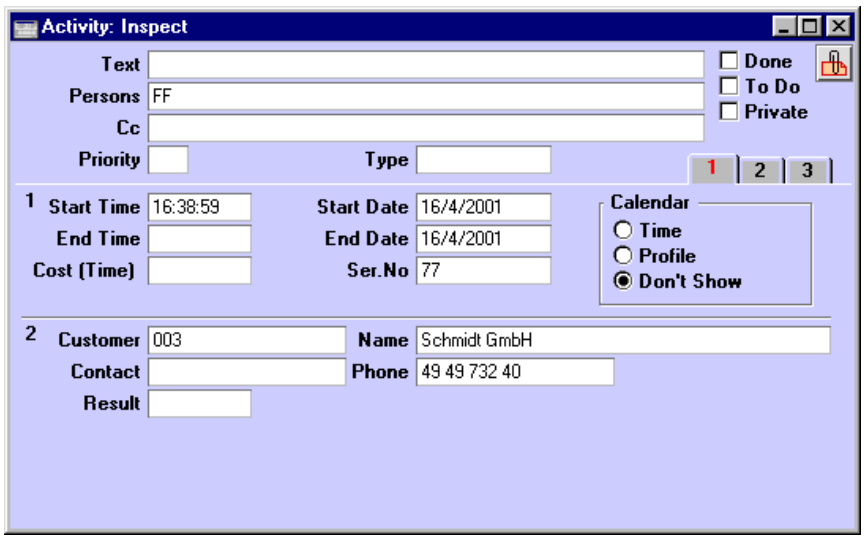
The Customer does not have to be saved before creating a Contact Person.

Please refer to Chapter 7, ‘Activities, To Do and Calendar’, for full details of the ‘Contact Person: New’ window.

New Activity

This function can be used to create an Activity for this Customer. This can be useful if it is necessary, for example, to schedule a call to a new Customer.

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



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. The Customer Number, Name and Phone Number are brought in automatically to the fields on card 2. No default Activity Type will be offered, while the To Do box will be checked.

After amendment if necessary, save the record in the Activity register by clicking the [OK] 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 window.

The Customer and the Activity will remain connected to each other through the Attachments facility. This allows you to open the Customer quickly and easily when reviewing the Activity, or to open the Activity from the Customer. When viewing the Activity or Customer, 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 does not have to be saved before creating an Activity.

Please refer to Chapter 7, ‘Activities, To Do and Calendar’, for full details of the ‘Activity: Inspect’ window.

Documents

Customer documents can be printed from the Contact module. Use the Modules menu to ensure you are in the Contact module and then select ‘Documents’ from the File menu or use the Ctrl-D (Windows) or ⌘-D (Macintosh keyboard shortcut. Then, double-click the appropriate item in the list. A specification window will then appear, where you can decide the Customers for which documents are to be printed. Click [OK] again to print the documents.

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.

To determine which Form is printed, follow this procedure (when FirstContact is supplied, a sample Form will be printed)—

1. Design a Form (or change the sample Form supplied to reflect your own requirements) using the Form register in the System module. This process is fully described in Chapter 8, ‘System Module’. The sample Form supplied has the Form Code “CUST_LABEL”

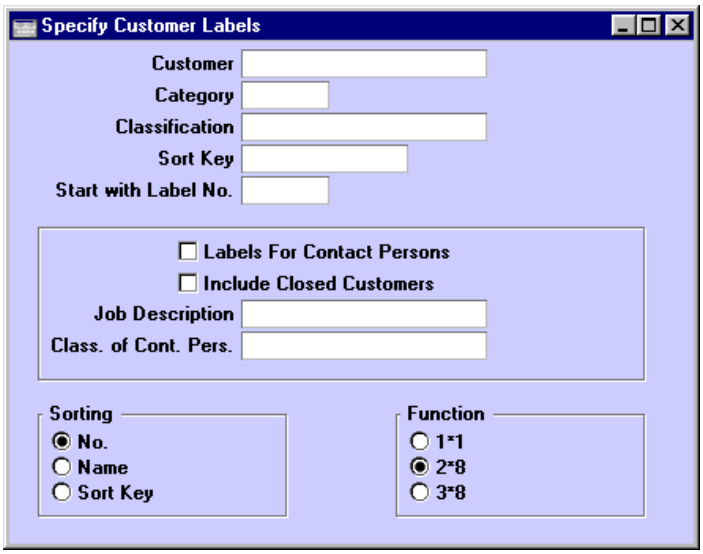
2. Change to the Contact module and open the ‘Documents’ window using the ‘Documents’ item on the File menu.

3. Highlight the item in the list and select ‘Define Document’ from the Special menu. The subsequent window is used to assign a Form (or more than one Form) to the document and is fully described in the ‘Documents’ section of the ‘FirstContact’s Work Area’ chapter earlier in this manual. In this instance, enter “CUST_LABEL” in the Form field of the first line.

4. The ‘Define Document’ function only needs to be used once. After this has been done, Form selection will be automatic.

Customer Labels

This document prints name and address labels to Customers. The Invoice Address on card 1 of the Customer screen is used.



Customer — **Paste Special** — Customer register

Range Reporting — Alpha

Enter the Customer Number or range of Numbers for which you want the labels printed.

Category — **Paste Special** — Customer Categories setting, Contact module

Select a Customer Category. Labels will be printed for all Customers in that Category.

Classification — **Paste Special** — Customer Classifications setting, Contact module

Select a Customer Classification. Labels will be printed for all 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 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.

Labels for Contact Persons

If you wish to print labels for all Contact Persons for the Customers in the selection (or for Contact Persons selected using the two options below), switch on this check box.

Include Closed Customers

Usually, labels will not be printed for Closed Customers (Customers whose Closed box on card 3 is checked). If you want to include such Customers in your label printing run, check this box.

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

If you wish to print labels for Contact Persons with a particular Job Description, enter that Job Description here.

Class. of Cont. Pers.

Paste Special Customer Classifications setting, Contact module

Select a Customer Classification. Labels will be printed for all Contact Persons with that Classification.

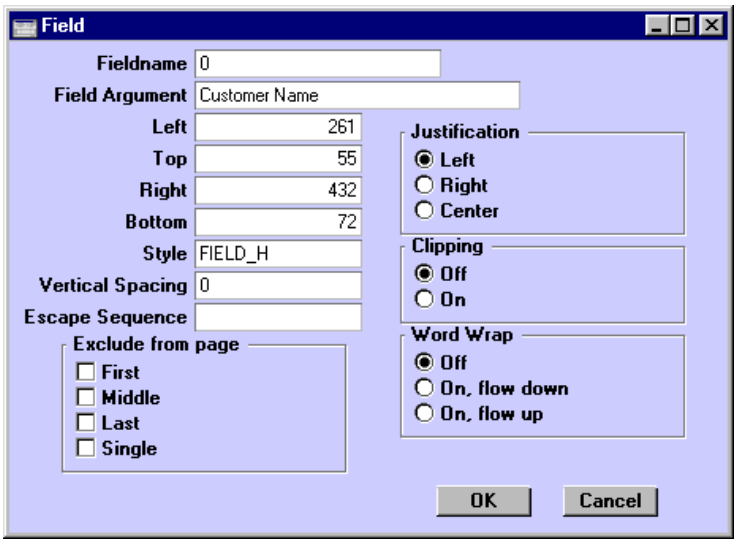
Sorting The labels can be sorted by Customer Number, Customer Name or Sort Key.

Function Choose which of the three standard label formats you are using, 2 or 3 columns and 8 rows on an A4 page, or a single label per page.

If you want static text to be printed on your labels (i.e. text that identifies the information on the labels, such as “Customer Name”), open your “CUST_LABEL” Form (using the Form register in the System module) and 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.



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.

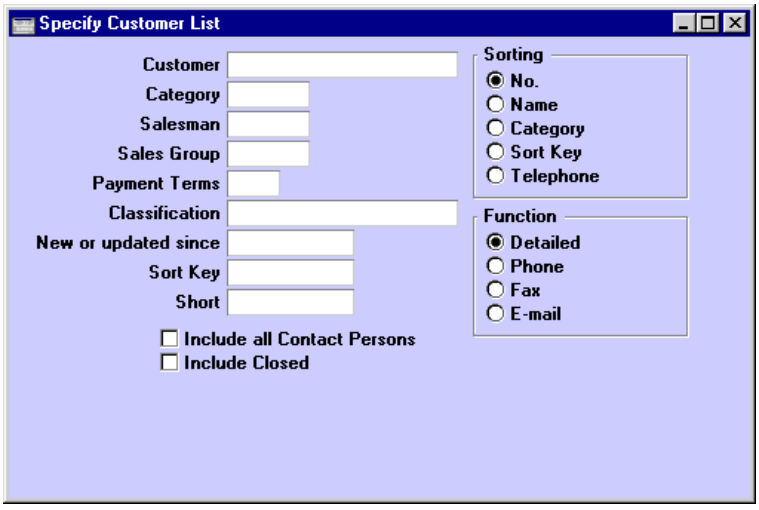
Reports

Customer reports are located in the Contact module. Use the Modules menu to ensure you are in the Contact module and then select ‘Reports’ from the File menu or click [Reports] in the Master Control panel. Then, highlight the appropriate item in the list. Using the Special menu, 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 the print destination has been chosen, click [OK]. A specification window will then appear, where you can decide what is to be included in the report. Click [OK] again to print the report.

Where specified below, it is often possible to report on a selection range, such as a range of Customers, or a range of Items. 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.

Customer List

This is a simple listing of all the Customers in the Customer register. It can be produced from the ‘Reports’ list in the Contact module. It can also be produced for an individual Customer by clicking the Printer icon when that Customer is open in a record window. In this case, it will be printed as if the Include all Contact Persons box is on.



Leave all the fields blank if the report is to cover all the Customers in the Customer register. If it is necessary to restrict the coverage of the report, use the fields as described below.

Customer **Paste Special** Customer register

Range Reporting Alpha

Use this field to limit the report to a single Customer, or range of Customers.

Category **Paste Special** Customer Categories setting, Contact module

To restrict the report to Customers of a single Category, enter a Category Code here.

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

To restrict the report to Customers of a single Salesman, enter a Salesman's initials here.

Sales Group To restrict the report to Customers with a particular Sales Group (shown on card 3 of the Customer screen), enter that Sales Group here.

Payment Terms **Paste Special** Payment Terms setting, Contact module

Use this field to restrict the report to Customers with the same Payment Terms.

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

Enter a Classification Code in this field if you want to list Customers with a certain Classification. If the field is empty, all Customers, with and without Classification, are included. If you enter a number of Classifications separated by commas, only those Customers featuring all the Classifications listed will be shown.

New or updated since

Paste Special Current Date

This field refers to the Changed Date field on card 1 of the Customer record and can be used to display recently entered or changed Customers.

Sort Key Enter a Sort Key. All Customers with that Sort Key will be listed in the report.

Short Enter a Short Code. All Customers with that Short Code will be listed in the report.

Include all Contact Persons

If selected, this option will list all Contacts for each Customer.

Include Closed Usually, Closed Customers (Customers whose Closed box on card 3 is checked) will not be included in the report. If you want to include such Customers in your report, check this box.

Sorting These radio buttons control the sort order of the report. The default is to print the report in Customer Number order, but you can also print in Name, Category, Sort Key, Department or Telephone Number order.

Function These radio buttons control the level of detail shown in the report.

- **Detailed** This, the default option, prints a comprehensive report that includes virtually all the information stored in each Customer record.
- **Phone** This choice produces a simple list showing the Customer Number, Name, Telephone Number, and Contact Person.
- **Fax** This option is the same as the previous one, with the exception that Fax Numbers are printed instead of Telephone Numbers.

E-Mail This is also the same as the Phone option, with the exception that Email Addresses are printed instead of Telephone Numbers.

FirstContact Items and Pricing

Chapter 4: Items and Pricing

The Item register is used to store information about the products and services that you sell. It is accessible from the Quotation register.

Items of a similar type can be grouped together using Item Groups. All Items of the same Group can be given the same VAT Codes, saving you the work of having to specify these for all Items individually. Defining and assigning Item Groups also makes modification easier: if it is necessary to assign a different VAT Code, for example, only one change need be made (to the Item Group), rather than many (to each of the Items).

If information is specified both for an Item Group and for an Item that belongs to that Group, that entered for the Item will take precedence.

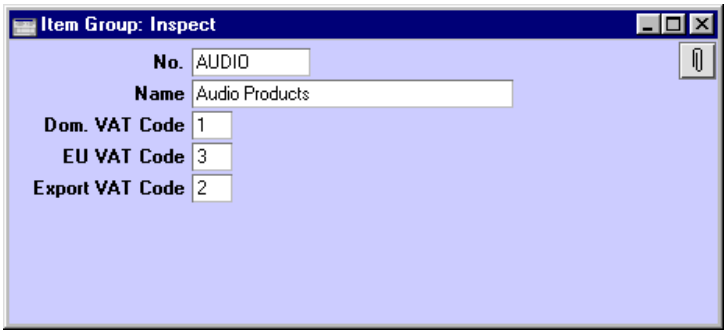
This chapter first describes the defining of Item Groups. This is followed by a detailed description of the Item register and of FirstContact's pricing features. The final section covers Item-related reports.

Settings

Item Groups

It can be practical to organise Items of similar kinds into Item Groups. This option can make the task of entering Items easier and gives you more flexibility in reporting.

Item Groups are defined using the setting in the Contact module. Use the Modules menu to enter the Contact module and then select 'Settings' from the File menu or click [Settings] in the Master Control panel. Double-click 'Item Groups' in the resulting list. Then click [New] to open a new record, or double-click an existing record to modify it.



No. Enter the code or number identifying this Item Group. You can use any combination of letters and numbers. There is a maximum of five characters.

Name Enter the name or description of the Item Group.

VAT Codes

Paste Special VAT Codes setting, System module

Used as default in Quotations

Enter a VAT Code for each Zone. Each will specify the rate at which VAT will be charged whenever an Item belonging to this Group is used in a Quotation. The Zone used will depend on that specified for the Customer.

If the Item has a VAT Code specified, that will take precedence over any entry here. If these fields are left blank, the VAT Code will be taken from the Customer.

Deleting an Item Group

1. Ensure you are in the Contact module using the Modules menu and select ‘Settings’ from the File menu or click [Settings] in the Master Control panel. Double-click ‘Item Groups’ in the resulting list.
2. Double-click the Item Group you want to remove.
3. Select ‘Delete’ from the Records menu. The Item Group is permanently removed. The window changes to show the preceding Item Group.
4. Close the window with the close box.

! ***You cannot undo the deletion of an Item Group.***

Units

Enter here the basic quantity units used in your business. When entering an Item, its Base Price will refer to this basic quantity unit. You might, for example, sell some Items singly, some in pairs and others in dozens. The single Item, the pair and the dozen are Units which can be entered in this setting. Units are used in Quotations, item reports and price lists, and the Units entered here are available as Paste Special codes.

Units are defined using the setting in the Contact module. Use the Modules menu to enter the Contact module and then select ‘Settings’ from the File menu or click [Settings] in the Master Control panel. Double-click ‘Units’ in the resulting list. Then click [New] to open a new record, or double-click an existing record to modify it. When the record is complete, save it by clicking [OK] in the Button Bar and close it using the close box.

For each Unit record, enter a Code and Comment (description) as appropriate.

The Item Register

In the Item register you store information about the products and services that you sell. If you also define Item Groups (described above) you can improve the reporting capabilities of the program. The Item register is accessible from the Quotation register.

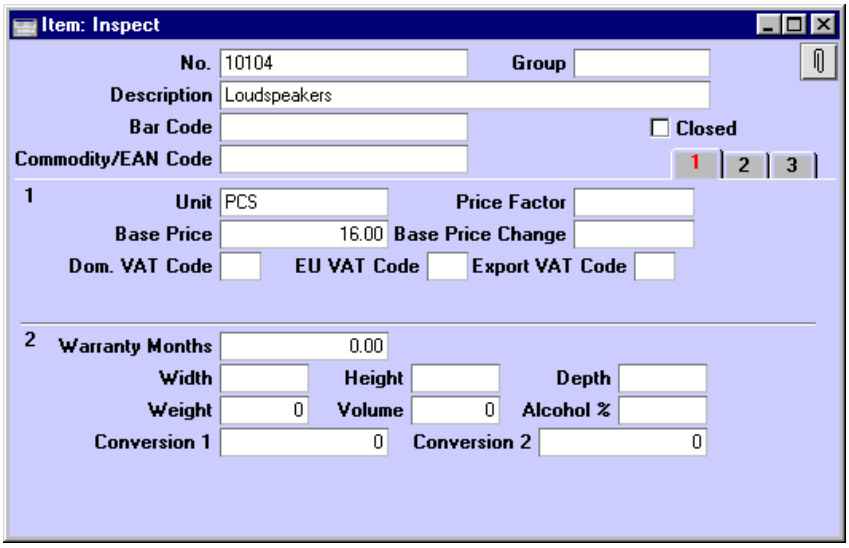
Entering an Item

Use the Modules menu to enter the Contact module and select ‘Items’ from the Registers menu, or click the [Items] button in the Master Control panel.

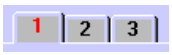
The ‘Items: Browse’ window is opened, showing all Items already entered.

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

The ‘Item: New’ window is shown, empty if you clicked [New] or with a copy of the copied Item. Complete the Item record as appropriate, then save it using the [OK] button and close the window by clicking the close box. Then, close the browse window using the close box again.

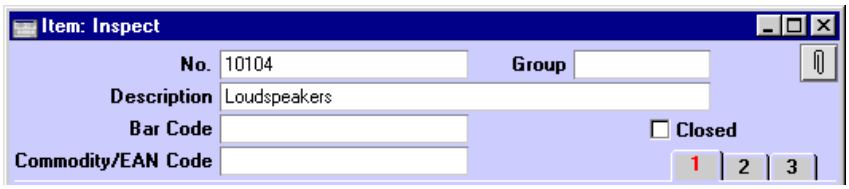


Since the amount of information stored about each Item will not fit on a single screen, the Item window has been divided into three cards. At the top of each is the header. This contains the Item Number, Item Group, Description and Commodity/EAN Code. There are three numbered buttons (‘tabs’) in the header.



By clicking the tabs you can navigate between cards. The header is always visible, as a reminder of the Item you are working with.

Header



No. Enter the unique identification code you are assigning to this Item. This is the means by which you will identify the Item when including it in Quotations. The field holds up to 20 characters.

Group **Paste Special** Item Group setting, Contact module

Enter the Item Group to which this Item belongs. Item Groups enable you to classify similar Items together. All Items of the same Group can use the same default VAT Code, saving you the work of having to specify these for all Items individually.

Closed Check this box if the Item is no longer to be used (you might not want to delete Items that have been used in Quotations). Closed Items will appear in the 'Items: Browse' window but not in the Items 'Paste Special' list. You will not be able to use a closed Item in Quotations. A closed Item can be re-opened at any time.

Description Enter the name or a short description of the Item.

Bar Code Record the Item's Bar Code here.

Providing the Bar Code does not clash with your Item Codes, you can enter it instead of the Item Code whenever you need to refer to this Item (in Quotations).

Commodity/EAN Code

Record the Item's European Union (EU) registration number here.

Card 1

Unit **Paste Special** Units setting, Contact module

Specify here the quantity to which the Base Price (below) refers. In the majority of cases, this will be a single item, but otherwise it might be a pair or a dozen.

Price Factor **Used as default in** Quotations

The Price Factor is used to define the Base Price of the Item as being for a certain quantity; e.g. a price per box. If a box contains 12 units and the Item is usually sold by the box, enter "12" in this field to indicate that the Base

Price refers to a box of 12. In Quotations, the price per unit is automatically calculated. Although related to the Unit field above, this field will tend to be used for Items where the basic sales unit can be broken (e.g. where an Item is usually sold as a box of 12 but can occasionally be sold individually), while the Unit field refers to unbreakable sales units.

Base Price **Used as default in** Quotations, Price Calculations

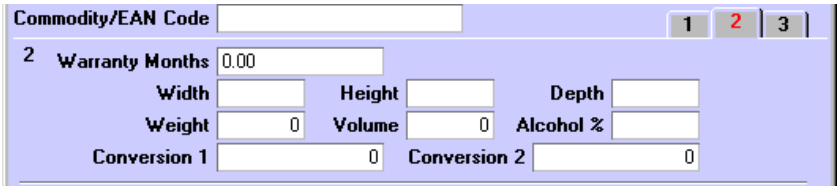
The normal sales price for the Item should be entered here.

Base Price Change This field shows the date of the last change to the Base Price for the Item and is updated automatically.

VAT Codes **Paste Special** VAT Codes setting, System module

When entering Quotations and including this Item, one of the three VAT Codes entered here will be offered as a default, depending on the Zone of the Customer. This Code will determine how VAT will be calculated. It will override any VAT Code specified for the Item Group or the Customer.

Card 2



Warranty Months Record here the length of the warranty period (if any) covering the Item.

Width, Height, Depth

The dimensions of one unit should be recorded in these fields. If at least two of the fields contain values, the Volume (below) will be calculated automatically.

Weight The weight of one unit should be recorded here.

Any unit of measurement can be used in the Weight field, but take care to use the same one for each Item.

Volume The volume of one unit should be recorded here.

If at least two of the Length, Width and Height fields (above) contain values, the Volume will be calculated automatically.

Alcohol % If appropriate, the alcohol content of one unit of the Item should be recorded here

Conversion 1, Conversion 2

These fields are used for Items which are sold in different quantities. For example, a particular Item might be sold in pairs, by the dozen and in boxes of 144. The Unit field on card 1 refers to the basic unit of sale, since this is the unit to which the Base Price refers. In this example, the basic unit is a pair. “72” will be entered as the Conversion 1 (72 of the basic unit i.e. 72 pairs make 144) and “6” as the Conversion 2.

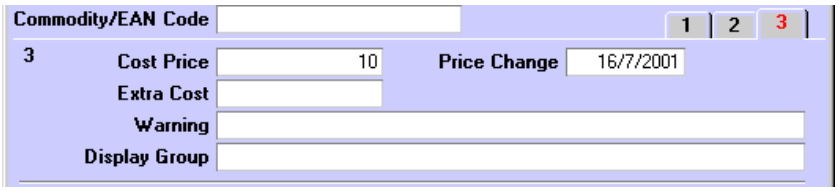
When designing the Quotation form using the Form register in the System module, three relevant fields can be shown. These are “Qty Conversion 1”, “Qty Conversion 2”, and “Qty Conversion 3”. Qty Conversion 1 refers to the Conversion 1 field, Qty Conversion 2 refers to the Conversion 2 field, and Qty Conversion 3 refers to the basic sale quantity.

If you issue a Quotation for 158 units of this Item (i.e. 158 pairs, the basic sale quantity), the three Qty Conversion fields on the printed documentation will appear as follows—

Qty Conv 1	Qty Conv 2	Qty Conv 3
2	2	2

2 boxes of 72 pairs + 2 boxes of 6 pairs + 2 pairs = 158 Units (pairs).

Card 3



Cost Price — **Used as default in** Quotations

The Cost Price of the Item should be recorded here. Since the figure will be used in calculating the Gross Profit of Quotations, it is important that it be determined by the same Unit and Price Factor values as the Base Price on card 1.

Extra Cost — Enter here any extra costs involved in the purchase of this Item, such as fixed freight costs. The figure will be included in the cost when calculating Gross Profit.

Price Change — This field shows the date of the last change to the Cost Price for the Item and is updated automatically.

Warning — Text entered here will appear as a warning to alert users whenever this Item is used.

Editing an Item

To edit an Item, click the [Items] button in the Master Control panel or select ‘Items’ from the Registers menu. The ‘Items: Browse’ window is opened.

The Items are initially shown in Item Number order. Change the sort order by clicking on one of the column headings: the underlined heading shows the current sort order.

To search for a specific Item, enter the text to be found in the Search field in the bottom left-hand corner of the window and press Return. The text should be such that it would appear in the current sort column: to search by Item Description, for example, sort by Description before entering a Description (or its initial letters) to the Search field.

To modify an Item record, double-click on the line in the browse window. That record will be opened in a window entitled ‘Item: Inspect’. The fields in this window are the same as those in the ‘Item: New’ window: please refer to the previous section for a detailed description of each field.

Edit the fields as necessary. Move from field to field with the Return key, or with the arrow keys. Click [OK] when you have finished, to save changes.

Deleting an Item

Select and open the Item record in the same way as for editing. Select ‘Delete’ from the Record menu. The Item is deleted.

! ***You cannot undo the deletion of an Item.***

Prices

Introduction

FirstContact has a powerful set of functions to handle different types of Price Lists in a business. These functions allow the user to manage several alternative Price Lists listing all or some of the goods or services offered to Customers. Different Price Lists can be connected with specific Customer Categories. The number of alternatives is great, but as always is the case with great flexibility, it is necessary to know and understand the tools and techniques to set up a specific pricing structure.

The Base Price

For each Item there is a field for the Base Price, shown on card 1. This is the Item's normal selling price. In many cases, this will be the only price used. If each Item is always sold at the same price (or with an *ad hoc* discount), whoever the Customer, you will be able to rely on the Base Price and not worry about the Price List feature.

On card 3 of the Item record, there is also a Cost Price. This indicates the cost of purchasing or making the Item. FirstContact uses the Cost Price to calculate the Gross Profit of Quotations.

Structure of Price Lists

FirstContact allows you to assign different Prices to individual Items so that each Price is associated with a particular Price List. For example, many retail outlets have different prices for their retail and trade Customers, or different retail and educational prices. You might then have separate retail, trade and educational Price Lists, each of which is available to the appropriate kind of Customer. When a Price List is specified in a Quotation, the appropriate prices will be selected automatically.

In planning such a price structure, follow these steps—

1. Enter the Items with their Base Prices, using the Item register as described towards the beginning of this chapter.

2. Each Price List (retail, trade and educational) should then be defined using the Price Lists setting in the Contact module. The Items that are to appear on the Price Lists should be attached as necessary.

3. For each Item on each Price List, enter a record to the Price setting (available in the Contact module) with an appropriate price. In our example, for each Item three Price records should be entered: one each containing the retail, trade and education prices. If a Price List is specified in a Quotation, FirstContact searches in the Price setting for the appropriate, and unique, record representing the particular Item for that Price List.

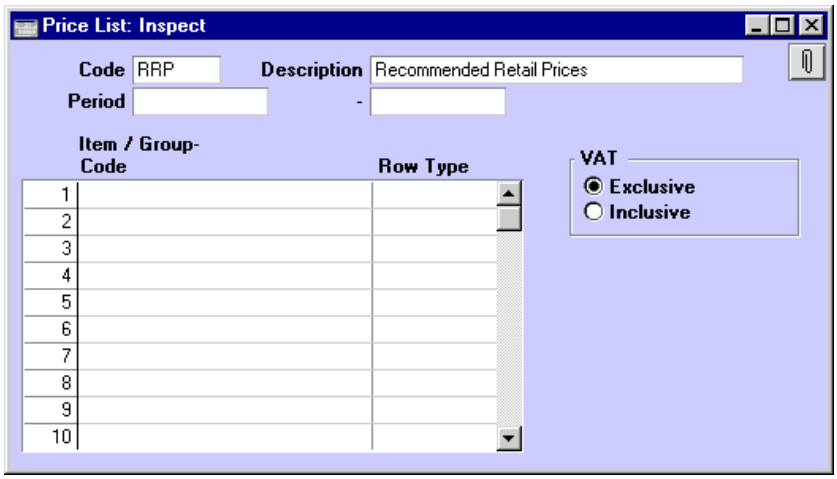
4. Each Customer or Customer Category can now be assigned a Price List. When Quotations are entered for each Customer, the specified Price List will be used automatically. If an Item not on the appropriate Price List is used in a Quotation, the Base Price will be used.

5. Price Lists can be printed or exported to disk for incorporation into your company's publicity material. Price Lists are printed using the report of the same name, available in the Contact module. This is fully described in the 'Reports' section towards the end of this chapter.

Below, steps 2 and 3 are described in detail.

Price Lists

To define a new Price List, first ensure you are in the Contact module using the Modules menu. Then click [Settings] in the Master Control panel or select 'Settings' from the File menu. Double-click 'Price Lists' in the resulting list and click [New].



Code Enter a unique code here, by which this Price List will be identified elsewhere in FirstContact.

Description Name the Price List here.

Period **Paste Special** Current Date

If the Price List is valid for a certain period, enter that period in these two fields. If this Price List is assigned to a Customer, it will only be used during the period entered here. At other times, the Base Price for each Item will be used.

These fields cannot be changed once the Price List has been saved for the first time.

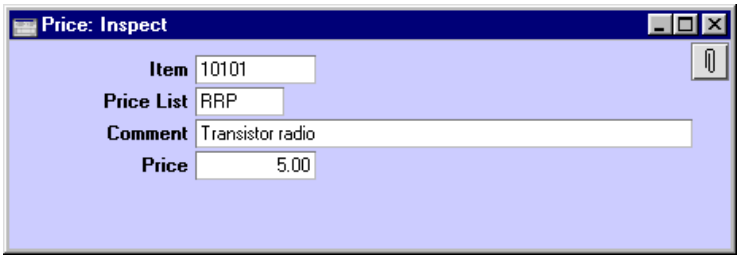
VAT Choose the Exclusive option if the prices are to exclude VAT, and the Inclusive option if they are to include VAT. If an 'Inclusive' Price List is used in a Quotation, the Unit Price, Sum and Total figures will all include VAT, but if an 'Exclusive' Price List is used, the Unit Price and Sum figures will exclude VAT. In both cases, VAT will be calculated using, in order of preference, the VAT Code specified for the Item or the Item Group.

The Prices Setting

It is possible to create several alternative Prices for each Item. These Prices are recorded as records in the Prices setting, one record for each Price for each Item. This task should be carried out once the Items, Item Groups and Price Lists have been defined.

You should ensure that there is a single, unique, Price record for each Item/Price List combination, making the use of Price Lists in Quotations extremely fast. FirstContact will prevent you entering a Price record for an Item/Price List combination if one already exists by displaying the error message "Already Registered".

To enter a new Price record, open the Prices setting from the 'Settings' list in the Contact module and click [New]. Enter the Item Number of an existing Item, using 'Paste Special' if necessary to select from a list of Items, and press Return. The Item Name from the Item register is shown. Enter the required Price, specify a Price List, again using 'Paste Special', and click [OK].



Assigning a Price List to a Price item has the following effects—

- It will be included when the Price List is printed, using the report in the Contact module.
- When a Quotation is created, a Price List can be specified which will determine the Prices used. The Price List can be specified on three levels: for each individual Quotation; for each Customer; or for Customer Categories. The second and third alternatives involve the Customer's Price List being offered as a default whenever a Quotation is issued to the Customer.

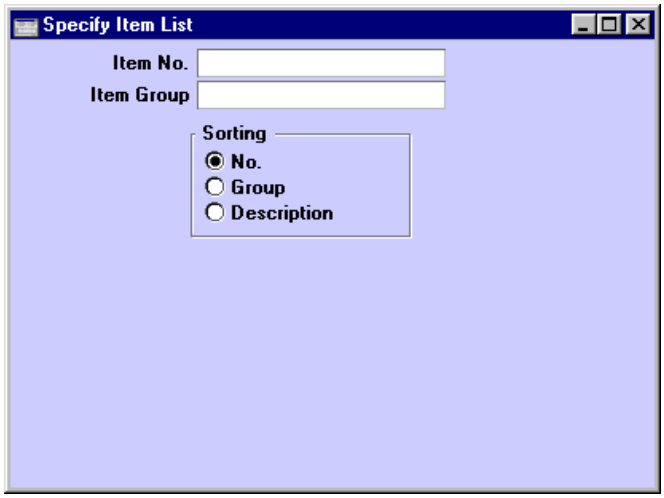
Reports

Item reports are usually located in the Contact module. Use the Modules menu to ensure you are in the correct module and then select ‘Reports’ from the File menu or click [Reports] in the Master Control panel. Then, highlight the appropriate item in the list. Using the Special menu, 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 the print destination has been chosen, click [OK]. A specification window will then appear, where you can decide what is to be included in the report. Click [OK] again to print the report.

Where specified below, it is often possible to report on a selection range, such as a range of Customers, or a range of Items. 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.

Item List

This report is available in the Contact module. For each Item, it displays the Item Number, Name, any Group membership, Unit, VAT Code and the Base Price.

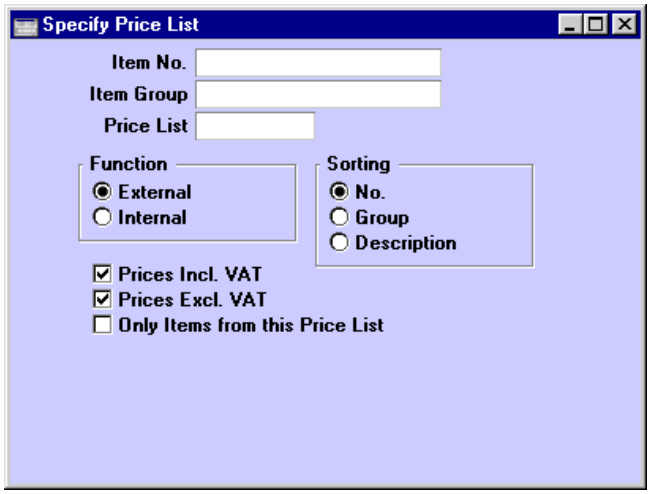


Leave all the fields blank if the report is to cover all the Items in the Item register. If it is necessary to restrict the coverage of the report, use the fields as described below.

Item No.	**Paste Special**	Item register
	Range Reporting	Alpha
	Use this field to limit the report to a single Item, or range of Items.	
Item Group	**Paste Special**	Item Group setting, Contact module
	Range Reporting	Alpha
	To limit the report to a single Item Group, enter an Item Group Code here.	
	If both a range of Items and a range of Item Groups are specified, the report will cover only those Items in the range which are members of the specified Item Groups.	
Sorting	The report can be sorted by Item Number, Item Group or Name.	

Price List

This report, available from the Contact module, prints a Price List. It is a report that perhaps might be sent to a text file so that it can be incorporated in your publicity material. To do this, after selecting ‘Reports’ from the File menu, highlight ‘Price List’ in the ‘Reports’ window. Then, go to the Special menu and select ‘File’ as the print destination. Click [OK] and decide upon the contents of the report using the screen illustrated below in the usual fashion. When you click [OK], you will be asked to name the text file and to specify where it is to be saved.



Leave all the fields blank if the report is to cover all Price Lists. If it is necessary to restrict the coverage of the report, use the fields as described below.

Item

Paste Special Item register

Range Reporting Alpha

To limit the report to a single Item, enter an Item Number here.

Item Group

Paste Special Item Group setting, Contact module

Range Reporting Alpha

To limit the report to a single Item Group, enter an Item Group Code here.

If both a range of Items and a range of Item Groups is specified, the report will cover only those Items in the range which are members of the specified Item Groups.

Price List

Paste Special Price Lists setting, Contact module

Specify which Price List is to be printed here.

By default, all Items or, if you have also specified a range of Items and/or a range of Item Groups, all Items in the range, will be printed irrespective of whether or not they have been included in the Price List. The Price shown will be taken from the appropriate Price record

or, if there isn't one, from the Base Price of the Item record.

If you only want to print those Items which fall within the range and which have been included in the Price List, use the Only Items from this Price List option (below).

Leave this field blank if you wish to print the Base Price of each Item, as entered to card 1 of the Item screen.

Function These options control the format of the report.

External Select this option to print sales prices together with the Item Code and Description.

Internal This option prints sales prices, cost prices, gross profit and gross margin.

Prices Incl. VAT Check this box to print prices including VAT in the report. This option applies to the External Price List only.

Prices Excl. VAT Check this box to print prices excluding VAT in the report. By checking this box and the one above, both inclusive and exclusive prices can be shown in the same report. This option applies to the External Price List only.

Only Items from this Price List

By default, the report will list all Items in the selected range, irrespective of whether they have been included in the Price List. The Price shown will be taken from the appropriate Price record or, if there isn't one, from the Base Price of the Item record.

If you only want to show those Items which fall within the range and which have been included in the Price List, check this box.

Sorting The report can be sorted by Item Number, Item Group or Item Name.

FirstContact Quotations

Chapter 5: Quotations

FirstContact can be used for creating Quotations for sending to Customers and to administer the subsequent follow-up calls. Contact Dates can be specified for each Quotation, making it easy to produce lists of calls to be made on a particular date.

Settings

Number Series - Quotations

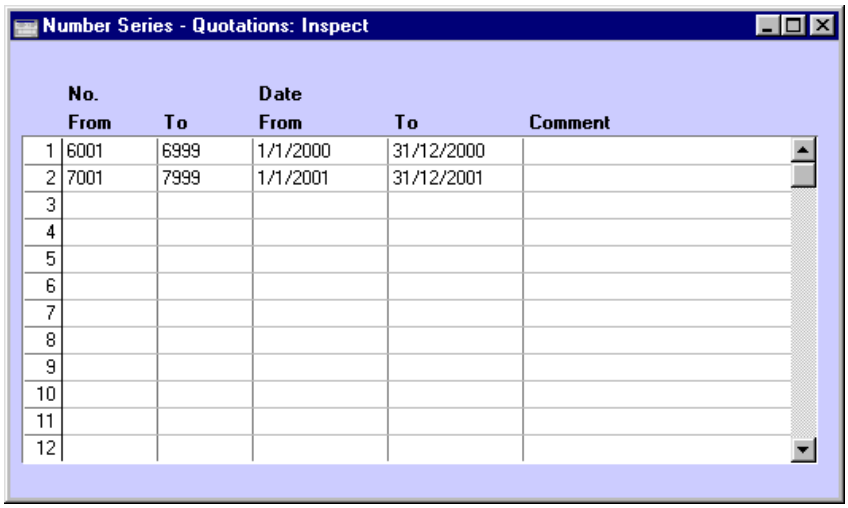
Each record in the Quotation register has its own unique identifying number, based on a sequential series. When entering a new Quotation, the next number in the series is used. If required, you can have a number of such sequences running concurrently, perhaps representing different years, different departments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

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

When entering records to the Quotation 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’.

Use the Modules menu to enter the Contact module and then select ‘Settings’ from the File menu or click [Settings] in the Master Control panel. Double-click ‘Number Series - Quotations’ in the resulting list.

The following window appears—

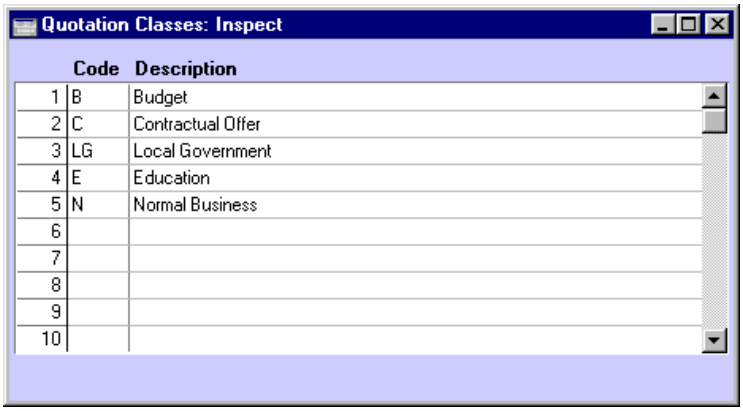


Enter each required Number Series on the first blank line and, when finished, click the [OK] button in the Button Bar to save the changes. To close the window without saving changes, click the close box.

Quotation Classes

The Quotation Class is a means of analysing Quotations for reporting or prioritising. When entering a Quotation, it can be assigned a Quotation Class which is visible in the 'Quotations: Browse' window. The Quotation Class can be used as a search criterion in the Quotation Journal and Quotation Stock reports.

Use the Modules menu to enter the Contact module and then select 'Settings' from the File menu or click [Settings] in the Master Control panel. Double-click 'Quotation Classes' in the resulting list. The 'Quotation Classes: Inspect' window opens, listing the available Quotation Classes: to enter a new item, click in the first blank row.



In the Quotation Class entry window, enter the following data—

Code — Enter the Code for the Quotation Class in this field. The code may contain up to five characters, and you may freely mix letters and numbers.

Description — To make it easier to remember what the different codes stand for, you can enter a short descriptive text in this field.

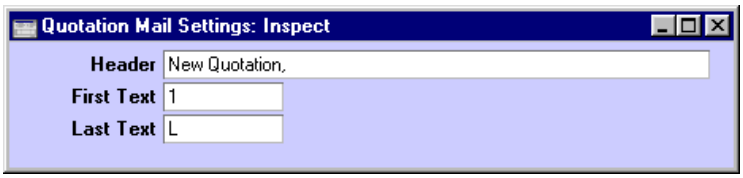
Click the [OK] button in the Button Bar to save the changes. To close the window without saving changes, click the close box.

Quotation Mail

The ‘Create Mail’ function on the Special menu of the Quotation screen can be used to create Mails containing details of Quotations. Such Mails can be used to send Quotations to Customers by email or to inform another member of staff that the Quotations exist.

This setting can be used to define the standard pieces of text that will appear in all Mails created using this function.

Use the Modules menu to enter the Contact module and then select ‘Settings’ from the File menu or click [Settings] in the Master Control panel. Double-click ‘Quotation Mail’ in the resulting list. The following window appears—



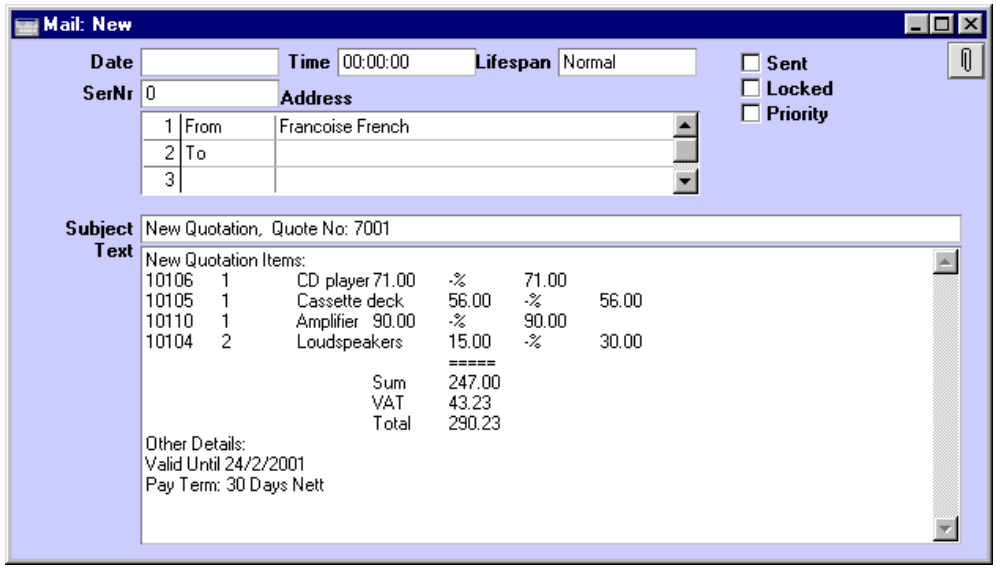
Header Enter the short piece of text that is to appear in the Subject line of the Mail.

First Text **Paste Special** Standard Texts setting, Contact module

Specify here the Code of a record in the Standard Texts setting in the Contact module. This record will contain the text that will appear at the beginning of the main body of the Mail, before the Quotation's Items are listed. In the example Mail shown below, the text "New Quotation Items: " has been taken from the specified Standard Text record (i.e. that whose Code is "1").

Last Text **Paste Special** Standard Texts setting, Contact module

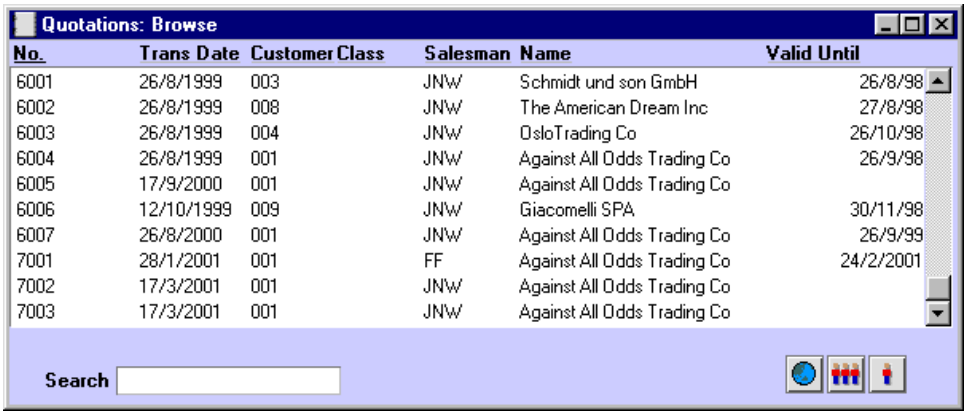
Again, specify the Code of a record in the Standard Texts setting. The text in this record will appear in the main body of the Mail, after the Quotation's Items are listed but before the Valid Until Date and the Payment Terms. In the example Mail shown below, the text "Other Details: " has been taken from the specified Standard Text record (i.e. that whose Code is "L").



The Quotation Register

This is the basic register for recording Quotation information.

In the Contact module, select ‘Quotations’ from the Registers menu, or click the [Quotations] button in the Master Control panel. The ‘Quotations: Browse’ window is opened, showing Quotations already entered.



Quotations are shown sorted by Quotation Number: this can be changed by clicking on one of the other column headings.

The buttons in the bottom right-hand corner are part of the Limited Access feature, and can be used as follows—

Lists all Quotations.

Lists Quotations belonging to members of the same Sales Group as the current user (i.e. those whose Sales Group field on card 3 is the same as that of the current user).

Lists Quotations belonging to the current user (i.e. those whose Salesman field on card 1 contains the initials of the current user).

It is also possible to prevent a user from seeing all Quotations in the list by restricting their view to their own Quotations or to those of their Sales Group.

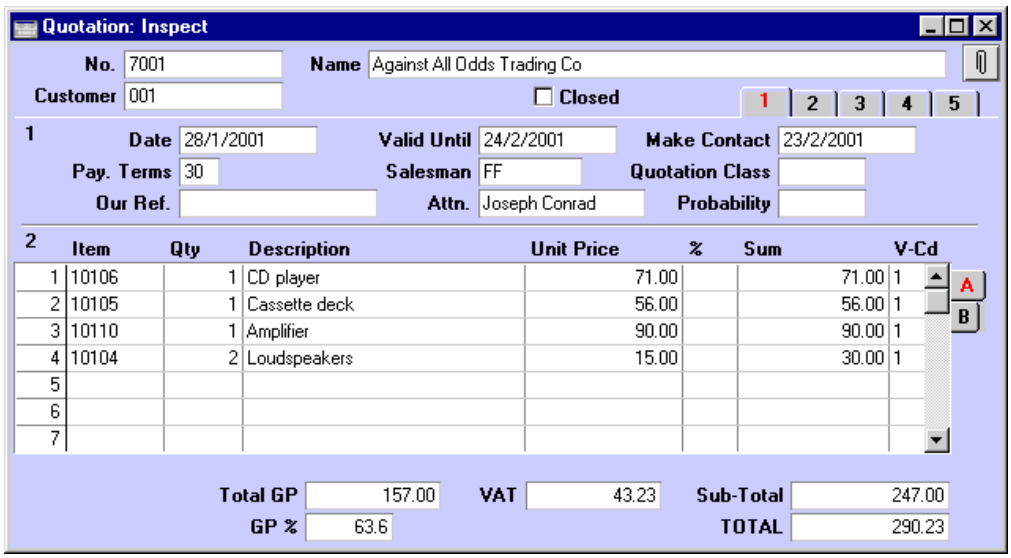
Please refer to the section describing the Person register in Chapter 8, ‘System Module’, for full details of the Limited Access feature.

Entering a Quotation

FirstContact provides several shortcuts to simplify your work when entering Quotations. You may for example enter the current date into a date field with the 'Paste Special' function. This can also be used to simplify the entering of Item Numbers, Customer Numbers, Quotation Classes etc. The 'Paste Special' function is fully described in Chapter 2, 'First Contact's Work Area'.

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

The 'Quotations: New' window is opened, empty if you clicked [New] or with a copy of the selected Quotation. Complete the Quotation record as appropriate, then save it using the [OK] button and close the window by clicking the close box. Then, close the browse window using the close box again.

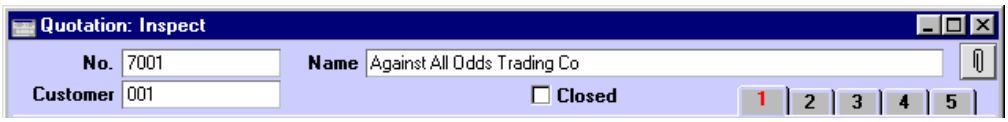


You are not bound by the values suggested by FirstContact. For most fields you can change the pre-set values into something that suits you better. Changes made here are valid only for this particular Quotation.

Since the amount of information stored about each Quotation will not fit on a single screen, the ‘Quotation: New’ window has been divided into five cards. At the top of each is the header. This contains the Quotation Number and the Customer Number and Name. There are five numbered buttons (‘tabs’) in the header.

By clicking the tabs you can navigate between cards. The header is always visible, as a reminder of the Customer whose Quotation you are working with.

Header



No. **Paste Special** Select from another Number Series

The Quotation Number: when creating a new Quotation, FirstContact will enter the next unused number from the first record in the Number Series - Quotations 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 Quotation Number is assigned when the Quotation is saved.

Customer **Paste Special** 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.

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

Closed Check this box when the Quotation is no longer required. Closed Quotations can be excluded from reports.

Card 1

Date — **Paste Special** Current Date

The date of the Quotation: the current date according to the computer's clock is used as a default.

Valid Until — **Paste Special** Current Date

The last date of validity of this Quotation. This can be shown on any documentation relating to the Quotation.

Make Contact — **Paste Special** Current Date

As a reminder, enter the date on which the Customer is next to be contacted regarding this Quotation.

The Make Contact Date can be used as a search criterion in the Quotation Journal report: this report can therefore be used to produce daily call sheets.

Alternatively, Activities can be used both to produce daily 'to do' lists and to maintain contact histories. Activities can be generated from Quotations using the 'Create Activity' function on the Special menu: the Make Contact Date of the Quotation will be copied to the Start Date of such Activities, thus ensuring that follow-up calls are correctly scheduled.

Pay Terms — **Paste Special** Payment Terms setting, Contact module

Default taken from Customer

The Payment Terms registered for this Customer in the Customer register are entered as a default by FirstContact.

Salesman

Paste Special Person register, System module

Default taken from Customer

The Salesman responsible for the Quotation should be registered here: Quotation Journal reports can be produced for each Salesman.

This field is also used by the Limited Access feature: please refer to the description of the Sales Group field (on card 3) for details.

Quotation Class

Paste Special Quotation Classes setting, Contact module

An optional Quotation Class for the record. Quotation Classes permit the analysis of Quotations for reporting or prioritising. One use might be to distinguish those which are open, won or lost.

Our Ref

Use this field if you need to identify the Quotation by means other than the Quotation Number.

Attn.

Paste Special Contact Persons register, Contact module

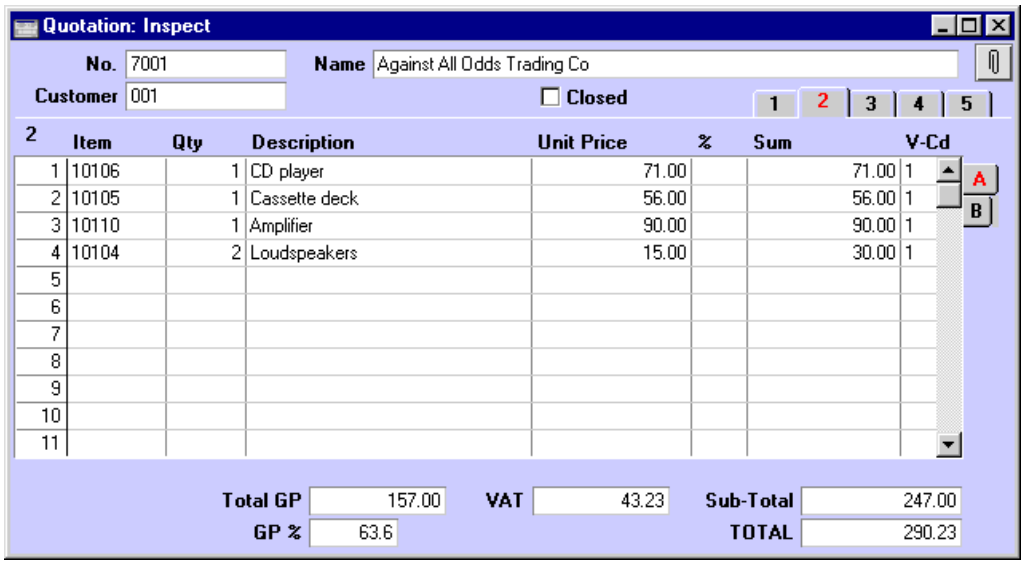
Default taken from Customer

Record here the person for whose attention this Quotation is to be marked. The ‘Paste Special’ list will show all available contact persons for the current Customer.

Probability

This field is used to record the percentage probability that an Order will result from the Quotation. This figure can be shown in the Quotation Stock report.

Card 2



Card 2 shows the quoted Items, some of which are also visible on card 1. They are shown in a grid which is divided into two horizontal flips. When you click on a flip tab (marked A and B), the two or three right-hand columns of the grid are replaced.

Before adding any rows to a Quotation, ensure that the Price List on card 3 is correct. If the Price List is altered after rows have been added, their prices will not be recalculated.

To add rows to a Quotation, click in any field in the first blank row and enter appropriate text. To remove a row, click on the row number on the left of the row and press the Backspace key. To insert a row, click on the row number where the insertion is to be made and press Return.

Flip A

Item **Paste Special** Item register

With the cursor in this field, enter the Item Number or Bar Code for each Item included on the Quotation. Pricing, descriptive and other information will be brought in from the Item record. If you leave this field

blank, you can enter any text in the Description field, perhaps using the row for additional comments to be printed on Quotation documentation.

Qty Enter the number of units offered. Press Return to calculate the Sum, and the cursor will move to the Item field on the next row.

Description **Default taken from** Item

This field shows the name of the Item, brought in from the Item register. If you want to add an extra description, you can do so: there is room for up to 100 characters of text. If you need more space, you can continue on the following line.

Unit Price The Unit Price of the Item according to the valid Price List for this Customer. If the Customer has no Price List specified, or the Item is not on the Price List in question, the Base Price from the Item screen is brought in. If there is a Price List applying to this Quotation, it will be shown on card 3. If the Price List specified is one which is Inclusive of VAT, this figure will include VAT.

% Discount percentage.

In the Round Off setting in the System module, you can determine whether the discount is to be applied to the Unit Price before it has been multiplied by the Quantity or to the Sum. In certain circumstances (where there is a very small unit price and a large quantity) this choice can cause the calculated discount to vary due to the rounding system used within FirstContact. Please refer to Chapter 8, 'System Module', for details and an example.

Sum The total for the row: Quantity multiplied by Unit Price less Discount. Changing this figure will cause the Discount Percentage to be recalculated. If the Price List specified is one which is Inclusive of VAT, this figure will include VAT.

V-Cd **Paste Special** VAT Codes setting, System module

The VAT Code entered here refers to a VAT Code record defined in the VAT Codes setting in the System module. It determines the rate at which VAT will be

charged on this Item. A default is offered, taken from the Item record. If none is specified there, the default is taken from the Item Group or the Customer. This default can be changed for a particular Quotation row if necessary.

Flip B

Price Factor **Default taken from** Item

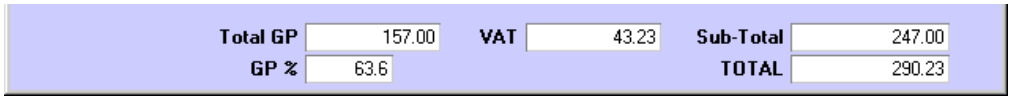
A Price Factor can be used to recalculate the Unit Price of an Item. For example, if the Item is normally purchased in boxes with 24 units, the Price Factor 24 can be entered in the Item record. The Unit Price for the Item will then refer to a box of 24 units. The Price Factor will be brought in to the Quotation from the Item: it can be altered and FirstContact will recalculate the Sum accordingly. The formula used is Sum = (Quantity/Price Factor) * Unit Price.

Cost **Default taken from** Item

The Cost Price is used in Gross Profit and Margin calculations. It can be altered if necessary.

GP The Gross Profit for the Quotation row is calculated by subtracting the Cost Price (multiplied by the Quantity) from the Sum. The figure is therefore absolute, not a percentage.

Footer



The Quotation Footer contains various running totals as described below. Whenever a Quotation row is added or changed, these totals are updated.

Total GP The total gross profit for the Quotation.

GP% The overall gross profit for the Quotation, shown as a percentage.

VAT The VAT total for the Quotation.

This figure is rounded up or down according to rounding rules set in the Round Off setting in the System module.

Sub-Total The total for the Quotation, excluding VAT.

TOTAL The total for the Quotation, including VAT.

This figure is rounded up or down according to rounding rules set in the Round Off setting in the System module.

Card 3

Price List

Paste Special Price Lists setting, Contact module

Default taken from Customer or Customer Category

Specify here the Price List which will determine the prices used on this Quotation. Ensure you have chosen the correct Price List before adding rows to the Quotation: if you change the Price List, any prices already in the Quotation will not be recalculated.

When a row is added to the Quotation and an Item specified, FirstContact searches in the Prices setting for the single record representing the Item/Price List combination and brings in the Unit Price from there. If no such record is found, the Base Price of the Item is used.

If the Price List specified is one which is Inclusive of VAT, the Unit Prices and Sums of each Quotation row will include VAT.

When creating a new Quotation, FirstContact will first look to the Customer record for an appropriate Price List. If none is specified there, the Price List for the Customer Category to which the Customer belongs will be used.

Sales Group

Default taken from Salesman

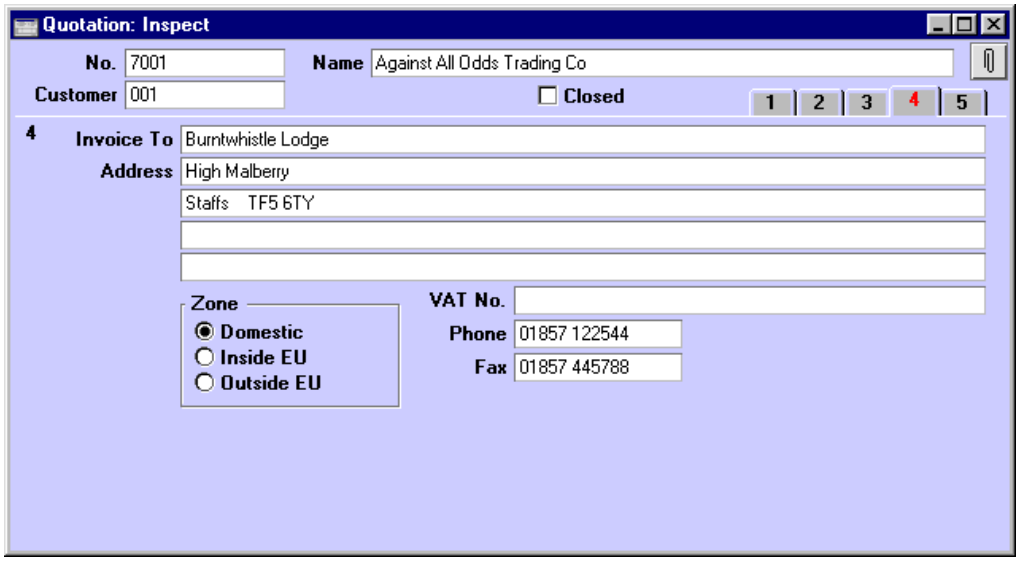
The Sales Group is brought in from the Person record after you have entered a Salesman (on card 1). This field can be used by the Limited Access feature to prevent a user from seeing all Quotations in the ‘Quotations:

Browse' window: their view can be restricted to their own Quotations or to those of their Sales Group.

Please refer to the section describing the Person register in Chapter 8, 'System Module', for full details of the Limited Access feature.

Comment Record here any comment about this Quotation.

Card 4



Invoice to Address

Default taken from Customer

The Customer's mailing address, as it has been entered on card 1 of the Customer record. If you need to change something for this Quotation only, you can do so here. Permanent changes should be made in the Customer register.

This field always shows the address of the Customer shown in the header, even if an Invoice To company has been specified on card 3 of the Customer record.

Zone **Default taken from** Customer

These radio buttons show the Zone for this Customer, brought in from the Customer record. This will

determine whether VAT will be included in the Quotation total.

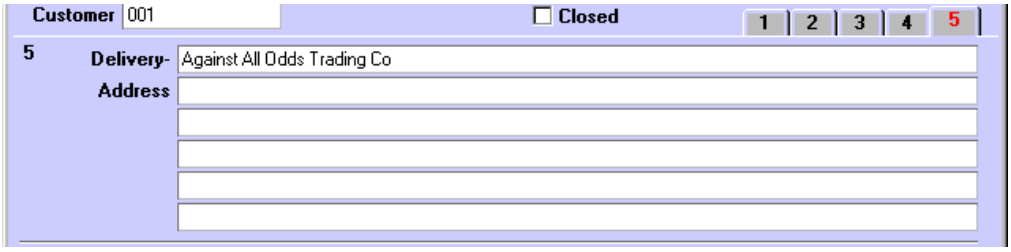
VAT No. **Default taken from** Customer

The Customer's VAT registration number. Although not vital for the purposes of producing a Quotation, it is important that the Customer's VAT Number is known if they are in the "Within EU" Zone.

Phone, Fax **Default taken from** Customer

The Customer's telephone and fax numbers, as entered on card 1 of the Customer record.

Card 5



Delivery Address **Default taken from** Customer

Enter the Delivery Address here, if different from the Invoice Address or the usual Delivery Address shown on card 2 of the Customer record.

When the Quotation is complete, click the [OK] button: it will then be saved in the Quotation register.

Inspecting and Changing Quotations

You can change a Quotation at any time, e.g. add or decrease the offered Quantity of a certain Item, remove or add rows etc. To do so, follow these steps—

1. Ensure you are in the Contact module and click the [Quotations] button in the Master Control panel or select 'Quotations' from the Registers menu. The 'Quotations: Browse' window is opened, listing all Quotations.

2. Double-click on the record you want to inspect or change. The window ‘Quotations: Inspect’ will appear. This is identical to the ‘Quotation: New’ window described above.

3. If you want to increase the quantity of a certain item, place the cursor in the Qty field and enter the new value. The Sum (and the figures in the footer area) will change accordingly.

4. If you want to insert a new row, select a row by clicking on the row number and press Enter. An empty new row is inserted, and the existing ones are moved down. Enter relevant data in the fields according to the description above.

5. If you want to delete a row, select it by clicking on the row number and choose ‘Clear’ from the Edit menu or press the Backspace key. The row is deleted, and the others are moved up.

6. To close the Quotation, click the close box. You will be asked if you would like to save the changes you have just made. You will be returned to the ‘Quotations: Browse’ window.

Printing Quotations

There are two ways to print a Quotation.

1. While entering or inspecting a Quotation, click the Printer icon in the Button Bar or select ‘Print’ from the File menu. If you want to print to screen, hold down the Shift key when clicking the Printer icon.

2. Ensure you are in the Contact module and select ‘Documents’ from the File menu. Select ‘Quotations’ in the ‘Documents’ list window and click [OK]. Enter the Quotation Number (or a range of numbers) to be printed and press [OK].

Whichever method is used, the Form used is determined as follows—

1. Using the Form register in the System module, design the quotation form and name it “QUOTE”. Use the ‘Properties’ function on the Special menu to assign a Document Type of “Quote”. A sample “QUOTE” is supplied with FirstContact: this can be modified to suit your requirements. Full instructions for using the Form register can be found in Chapter 8, ‘System Module’.

2. Select the Contact module using the Modules menu.

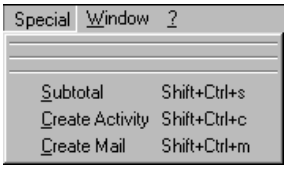
3. Select ‘Documents’ from the File menu. The ‘Documents’ list window is opened: highlight ‘Quotations’.

4. Select ‘Define Document’ from the Special menu.

5. In the subsequent window, enter “QUOTE” in the Form field of the first line (you can use ‘Paste Special’ to ensure the spelling is correct).

6. Click [OK] to save the Quotation Form definition. From now on, the quotation form that you have designed will be used, from the ‘Documents’ function and from the Printer icon.

Special Menu



The Special menu for the ‘Quotation: New’ and ‘Quotation: Inspect’ windows is shown above. There is no Special menu for the ‘Quotations: Browse’ window.

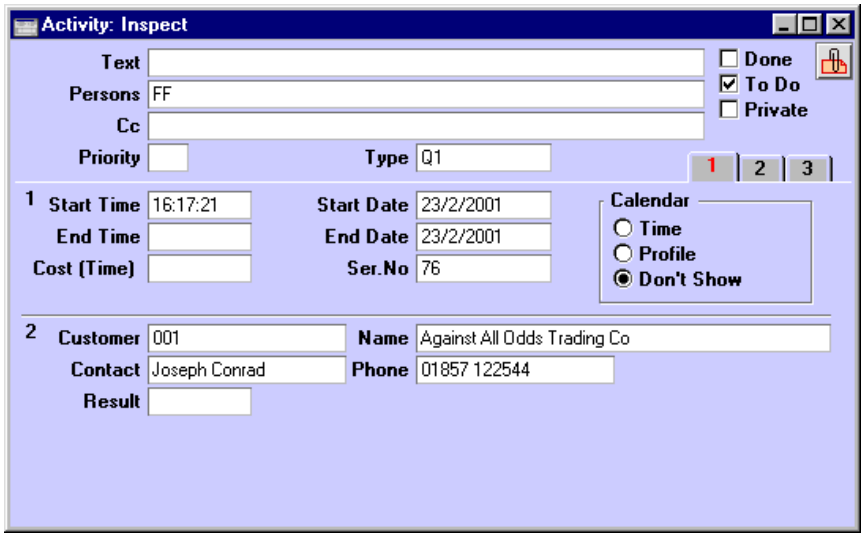
Subtotal

This function can be used to show subtotals in Quotations. Insert a new row in the grid on card 2, ensure the cursor is somewhere in the row and select this function from the Special menu. A subtotal is placed in the Sum field, the sum of the previous rows. If there is already a row showing a subtotal, only the Items below that row are included in the new subtotal.

Create Activity

This function can be used to create Activities. This can be useful to schedule a call to check that the Quotation has been received or to attempt to convert it into a sale. The Activity Type given to Activities created by this function is controlled using the Activity Types, Subsystems setting in the Contact module.

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



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. The Start Date of the Activity will be the Make Contact Date of the Quotation if there is one, otherwise it will be the Quotation Date. After amendment if necessary, save the record in the Activity register by clicking the [OK] 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 Quotation window.

The Quotation and the Activity will remain connected to each other through the Attachments facility. This allows you to open the Quotation quickly and easily when reviewing the Activity, or to open the Activity from the Quotation. When viewing the Activity or Quotation, 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.

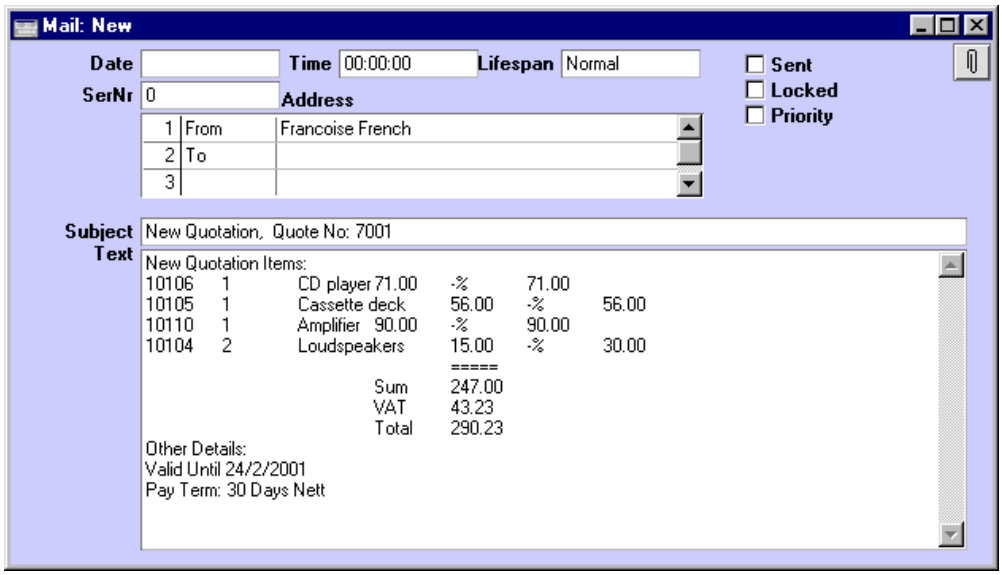
The Quotation does not have to be saved before creating an Activity.

Please refer to Chapter 7, ‘Activities, To Do and Calendar’, for full details of the ‘Activity: New’ window.

Create Mail

This function can be used to create a Mail containing details of the Quotation. This can be used to send the Quotation to the Customer by email or to inform another member of staff that the Quotation exists. For example, a Salesman might need to request that the technical department checks a Quotation for accuracy.

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



A new record is opened in a window entitled ‘Mail: New’. This means that it has not yet been saved. If the Salesman of the Quotation has a Mailbox, the name from that Mailbox will appear in the From field (i.e. the Salesman will be the default sender of the Mail). The text in the Subject field (“New Quotation, ” in the example illustrated above) is taken from the Header field in the Quotation Mail setting. The Quotation Number is also shown. The Quotation Mail setting also allows two Standard Texts to be included in the Mail. The first of these is shown at the beginning of the Text field (“New Quotation Items: ” in the illustration). This is followed by a list of Items from the Quotation, with Prices and Quantities. The second Standard Text then appears (“Other Details: ” in the illustration), and this is followed by the Valid Until Date and the Payment Terms. The main body of the Mail can be reformatted to suit your requirements, and a recipient should be specified in the To field. This should be the Customer’s email address, or the Mailbox name of the member of staff to whom the Mail is being sent. If you are then ready to send the Mail, check the Sent box. Finally, save the Mail by clicking

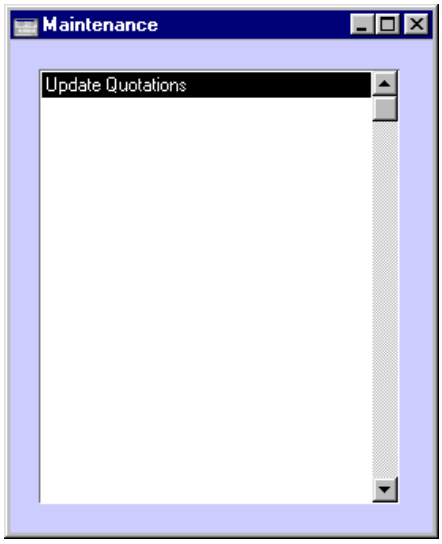
the [OK] button in the Button Bar and close it using the close box. Alternatively, if you no longer require the Mail, click [Cancel]. In either case, you will be returned to the Quotation window.

The Quotation does not have to be saved before creating a Mail.

If you wish to use this function to send Mails to other members of staff, FirstContact's Mail functions must be in use and the recipient should have a Mailbox. If you need to send Mails to Customers, the External Gateway module must be in use, and the E-Mail SMTP Server setting must be configured. Please refer to Chapter 6, 'Mail', for full details of FirstContact's mailing facilities.

Maintenance

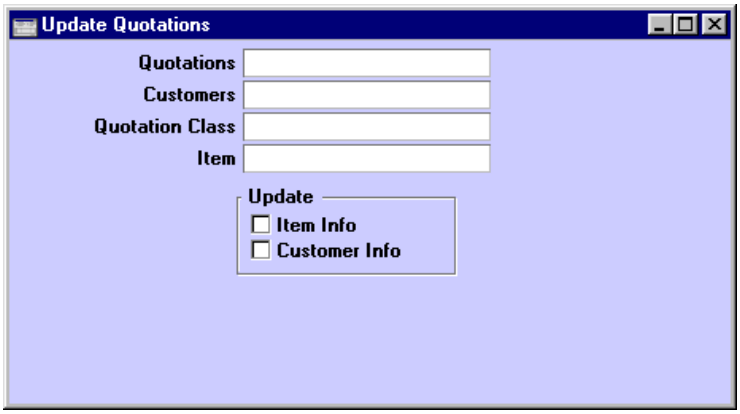
Maintenance functions tend to be used to carry out certain updating tasks, usually involving batch processing and encompassing all or many of the records in the affected register. There is one such function available in the Contact module. To use it, select ‘Maintenance’ from the File menu. The following window appears—



Double-click the item in the list. A specification window will then appear, where you can decide how the function is to operate. Click [OK] again to operate the function.

Update Quotations

This function updates selected Quotations with new details from the Item and Customer registers and the Prices setting.



Quotations **Range Reporting** Numeric

To update particular Quotations, enter a Quotation Number or a range of Quotation Numbers here.

Customers **Paste Special** Customer register

Range Reporting Alpha

To update all Quotations of a particular Customer, enter a Customer Number or range of Customer Numbers here.

Quotation Class **Paste Special** Quotation Classes setting, Contact module

To update all Quotations of a particular Class, enter a Quotation Class here.

Item **Paste Special** Item register

To update a particular Item wherever it appears in Quotations, enter an Item Code here.

Update Use these alternatives to determine the information to be changed by the function. If the Item Info option is chosen, Prices and Cost Prices will be changed as well as Item Names and Descriptions. This includes reference to any Price Lists that may apply.

Press the [OK] button to start the updating process. This may take a few minutes, depending on the number of Quotations, and on the number of Items to be updated. When the process has finished, you will be returned to the 'Maintenance' list window. This can be closed by clicking the close box.

Documents

The ‘Documents’ function permits the printing in batches of particular documents or Forms. Quotation documents can be printed from the Contact module. Use the Modules menu to ensure you are in the Contact module and then select the ‘Documents’ item on the File menu or use the Ctrl-D (Windows) or ⌘-D (Macintosh) keyboard shortcut. Then, to print a document, follow this procedure—

1. Highlight the appropriate item in the list.

2. Using the Special menu, determine the print destination of the document. The default is to print to the chosen printer. Other options available are the Print Queue (see Chapter 2, ‘FirstContact’s Work Area’, for full details of this feature) or Fax (if your hardware can support this feature).

3. Click [OK]. A specification window will then appear, where you can determine the information that is to be included in the printed documents (e.g. which Quotations are to be printed). This specification window is described in detail below.

4. Click [OK] again to print the documents.

5. Close the ‘Documents’ window using the close box.

To determine which Form is printed, follow this procedure (when FirstContact is supplied, a sample Form will be printed)—

1. Design a Form (or change the sample Form supplied to reflect your own requirements) using the Form register in the System module. This process is fully described in Chapter 8, ‘System Module’. The sample Form supplied has the Form Code “QUOTE”.

2. Change to the Contact module and open the ‘Documents’ window using the ‘Documents’ item on the File menu.

3. Highlight the item in the list and select ‘Define Document’ from the Special menu. The subsequent window is used to assign a Form (or more than one Form) to the document and is fully described in the ‘Documents’ section of Chapter 2, ‘FirstContact’s Work Area’. For example, different Forms can be used determined perhaps by the Number Series of the Quotation. In this instance, enter “QUOTE” in the Form field of the first line.

4. The ‘Define Document’ function only needs to be used once. After this has been done, Form selection will be automatic.

The process for selecting Quotations to be printed is described below. Leave all the fields in the specification window blank if documents for all the Quotations 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 Quotation Numbers. To do this, enter the lowest and highest values of the range, separated by a colon. For example, to report on Quotations 001 to 010, enter “001:010” in the Number 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.

Quotations

FirstContact can produce a printed Quotation document to be sent to the Customer.

Enter a Quotation Number or a range of Quotation Numbers separated by a colon to select the records for printing.

A single Quotation can also be printed from a record window by clicking the Printer icon, or printed to screen by holding down the Shift key when clicking the Printer icon.

Reports

Quotation reports are located in the Contact module. Use the Modules menu to ensure you are in the Contact module and then select ‘Reports’ from the File menu or click [Reports] in the Master Control panel. Then, highlight the appropriate item in the list. Using the Special menu, 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 the print destination has been chosen, click [OK]. A specification window will then appear, where you can decide what is to be included in the report. Click [OK] again to print the report.

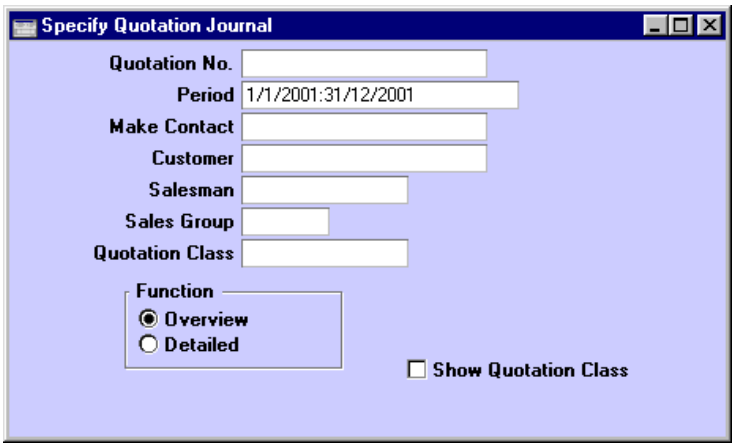
In all cases, leave all the fields in the specification window blank if the report is to cover all the Quotations in the database. If it is necessary to restrict the coverage of the report, use the fields as described individually for each report.

Where specified below, it is often possible to report on a selection range, such as a range of Customers, or a range of Items. 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.

With a report in the active window, the ‘Recalculate’ command on the Special menu can be used to update the report after making alterations to background data.

Quotation Journal

This report shows the Quotations entered in the system. Closed Quotations are not listed.



Quotation No. **Range Reporting** Numeric

Enter a Quotation Number or a range of Numbers.

Period **Paste Special** Reporting Periods setting, System module

Enter the start and end dates of the period covered by the report.

Make Contact **Paste Special** Reporting Periods setting, System module

Range Reporting Date

To list Quotations with a particular Make Contact date, enter that date here.

Customer **Paste Special** Customer register

Enter a Customer Number to list the Quotations sent to a single Customer.

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

To limit the report to Quotations generated by a single Salesman, enter their initials here.

Sales Group To list Quotations with a particular Sales Group (shown on card 3), enter that Sales Group here.

Quotation Class **Paste Special** Quotation Classes setting, Contact module

Enter a Quotation Class code to list Quotations of a single Class.

Function Use these options to control how much detail is included in the report.

Overview This option produces a report with a single line per Quotation, showing the Quotation Number, Date, Make Contact Date, Customer and Quotation Total including VAT.

Detailed In addition to the information shown in the Overview, this option includes the full Customer address, telephone number and Payment Terms and lists all Items on the Quotation individually.

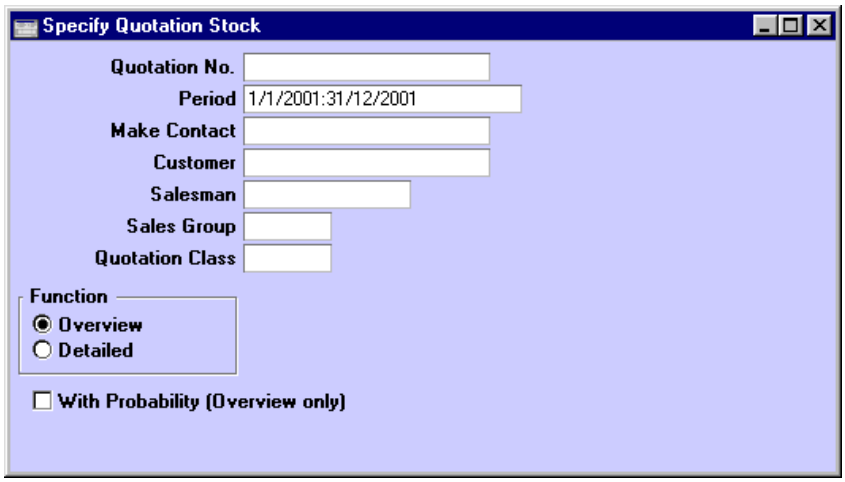
Show Quotation Class

This option sorts the Quotations by Class and provides total values including and excluding VAT for each Class. Quotations that do not have a Class will not be listed.

Quotation Stock

This report is similar to the Quotation Journal described above. As it is possible to search by Contact Date, the report can therefore be used to produce a useful call list for each day.

When printed to screen, the Quotation Stock report has FirstContact's Drill-down feature. Double-click on the Quotation Number of any Quotation in the report to open that Quotation record.



Quotation No. **Range Reporting** Numeric

Enter a Quotation Number or a range of Numbers.

Period **Paste Special** Reporting Periods setting, System module

Enter the start and end dates of the report period. The default is the first record in the Reporting Periods setting.

Make Contact **Paste Special** Reporting Periods setting, System module

Range Reporting Date

To list Quotations with a particular Make Contact date, enter that date here.

Customer **Paste Special** Customer register

Enter a Customer Number to list the Quotations sent to a single Customer.

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

To limit the report to Quotations generated by a single Salesman, enter their initials here.

Sales Group To list Quotations with a particular Sales Group (shown on card 3), enter that Sales Group here.

Quotation Class **Paste Special** Quotation Classes setting, Contact module

Enter a Quotation Class code to limit the report to Quotations of a single Class.

Function Use these options to control how much detail is included in the report.

Overview This option produces a report with a single line per Quotation, showing the Quotation Number, Date, Make Contact Date, Customer and Quotation Total including VAT.

Detailed In addition to the information shown in the Overview, this option includes the full Customer address, telephone number and Payment Terms and lists all Items on the Quotation individually.

With Probability (Overview only)

Use this option if you want to show the Probability that a Quotation will be converted to an Order (taken from card 1 of the Quotation). This can only be shown if the Overview option is selected.

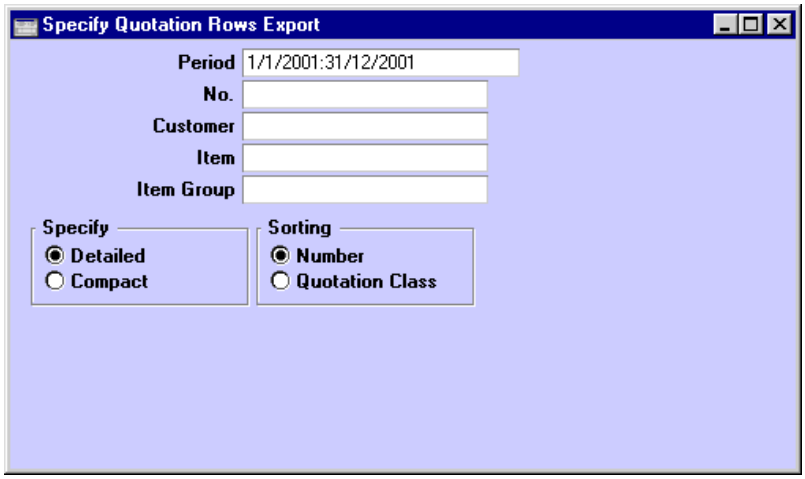
Exports

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. Ensure you are in the Contact module and select ‘Exports’ from the File menu.

On selecting the function, the ‘Exports’ list window appears. This lists the Exports which can be produced from the Contact module. Double-click the appropriate item in the list. A specification window will then appear, where you can decide the contents of the exported text file. Click [OK] again to name the file and to determine where it is to be saved.

Quotation Rows

The ‘Quotation Rows’ export produces a text file containing all the rows from the Quotations in the selection you make. This information can be used for different statistical analysis in other programs, for example spreadsheets.



Use the selection fields to make the selection you want. Range reporting is possible from the Customer and Quotation Number fields.

FirstContact Mail

Chapter 6: Mail

FirstContact's Mail facilities allow users in multi-user systems to—

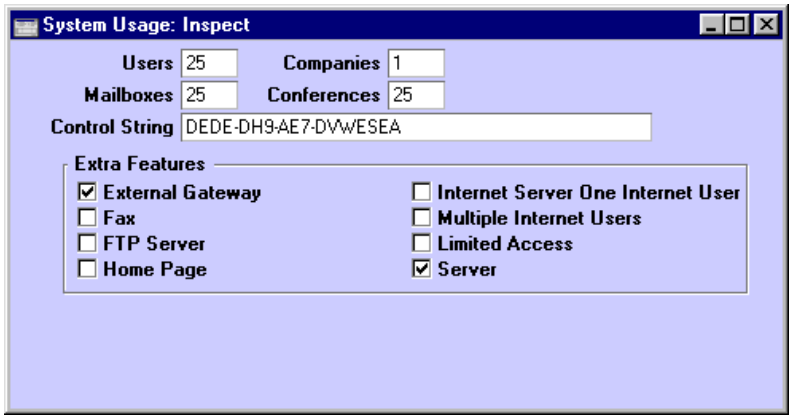
- send Mail to other users, with or without attached files or FirstContact records;
- send Mail to Conferences, where it can be read by all users (subject to access restrictions);
- update Mail that has been sent by other users;
- send and receive email (referred to as "External Mail" in this manual); and
- chat with other users.

Setting up the FirstContact Mail System

The Server

Set up the server as described in the 'Creating a New Database - Multi-user' section in Chapter 1, 'Introduction and Installation'.

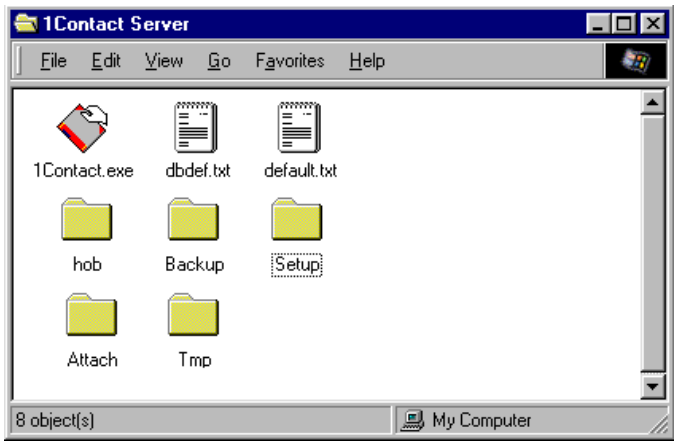
Open the System Usage setting in the System module. Ensure the numbers of Users, Mailboxes and Conferences are correct and that the Server box is checked. If you will be using external mail, check the External Gateway box. The External Gateway provides the bridge between the Mailboxes in FirstContact and external email addresses. If you have been using FirstContact for some time before implementing its mail facilities, any changes in this setting will result in you having to apply for a new Enabler key.



If you want users to be able to log on to the server to send and receive mail over the internet using a browser, check the Home Page, Internet Server and Multiple Internet Users boxes. Please refer to your local FirstContact representative for more details about this feature.

Ensure that a folder named “Attach” is in the FirstContact server folder. This is used to store any files that have been attached to internal Mails.

If the server will be acting as the External Gateway, a folder named “Tmp” should also be present in the FirstContact server folder. This is used to store mail attachments downloaded from the POP3 server before they are transferred to the “Attach” folder and attachments that are to be uploaded to the SMTP server. Please refer to the ‘External Mail’ section below for details about setting up the External Gateway.



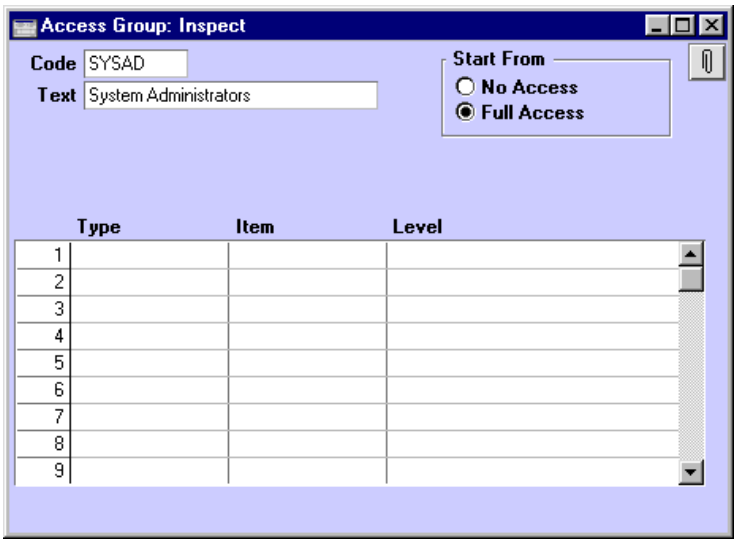
The remaining set-up work should be carried out on the server, so do not put it in to server mode yet.

The Technics Module

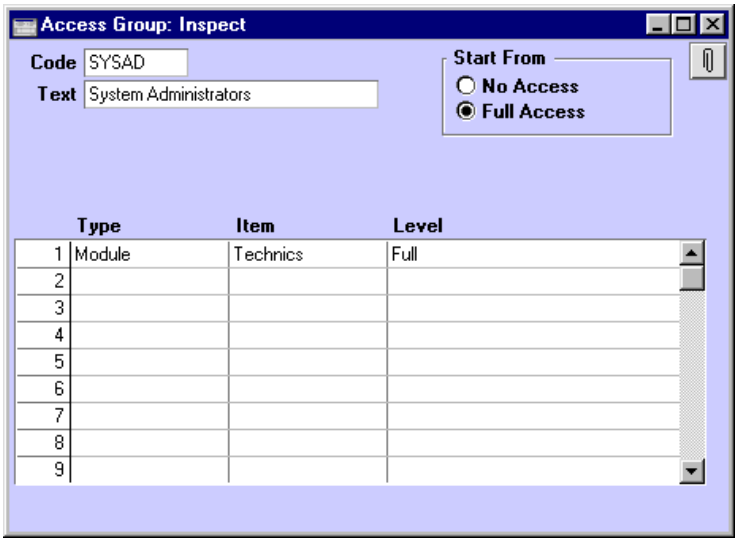
Apart from the entering of records representing members of personnel to the Person register, all configuration work for the FirstContact Mail system is carried out in the Technics module. You can get in to the Technics module in one of two ways—

1. Usually, the Technics module is only available on the server, when no other user is logged in. If the server is running, you must first select 'Quit, Remove Autoserver' from the File menu and restart FirstContact before you can use the Modules menu.

   If 'Technics' is not available on the Modules menu, the probable reason is that you have logged on as a Person that does not have access privileges for this module. If you are the system administrator, it is recommended that your Person record either does not belong to an Access Group or belongs to one that Starts from Full Access and does not exclude access to the server or Technics modules.



2. If you want to be able to use the Technics module on a client machine when other users are logged in, your Person record should belong to an Access Group that Starts from Full Access and explicitly grants full access to the Technics module—



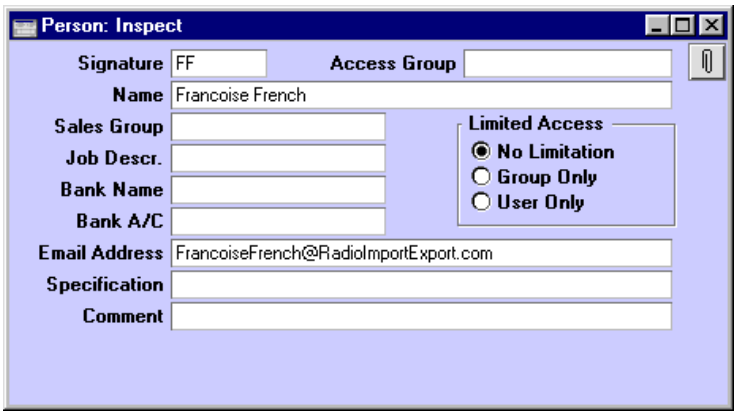
If your Person record belongs to such an Access Group, you will be able to enter the Technics Module using the Modules menu on a client machine to carry out all the configuration work described below. Any Person that is to act as a system administrator should belong to such an Access Group.

Persons and Access Groups are both fully described in Chapter 8, ‘System Module’.

Persons

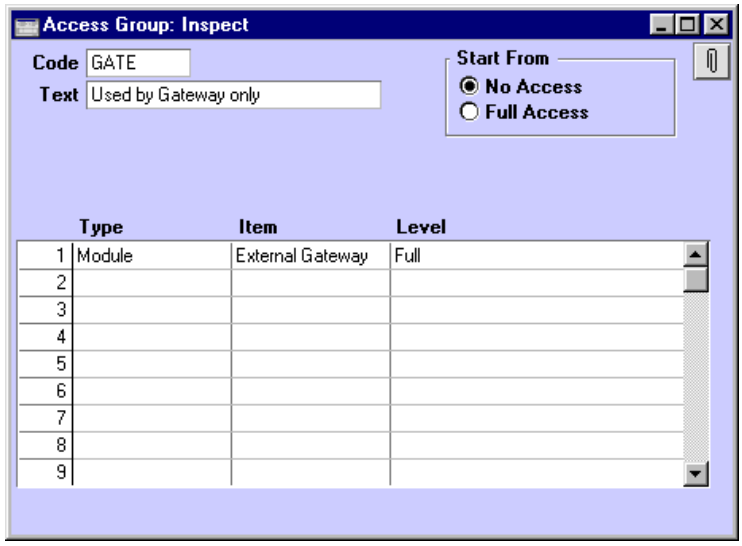
All members of personnel likely to use the mail system should be entered to the Person register, found in the System module. Full details about this register (including the assigning of passwords) can be found in Chapter 8, ‘System Module’.

For each Person likely to send external mail, specify a return Email Address—



Where there is more than one Company in the database, records in the Person register are specific to the Company in which they were entered. However, their Mailboxes will be open to all Companies in the database. This allows mail to be sent between Persons in different Companies. One implication of this is that all Persons across all Companies should have different Signatures (initials). If there are two or more Persons in different Companies with the same Signature, they will not be able to have their own Mailbox.

If you are using external mail, create a record in the Person register with “GATE” as the Signature. This Person should belong to an Access Group that Starts from No Access and with full access to the External Gateway module only—

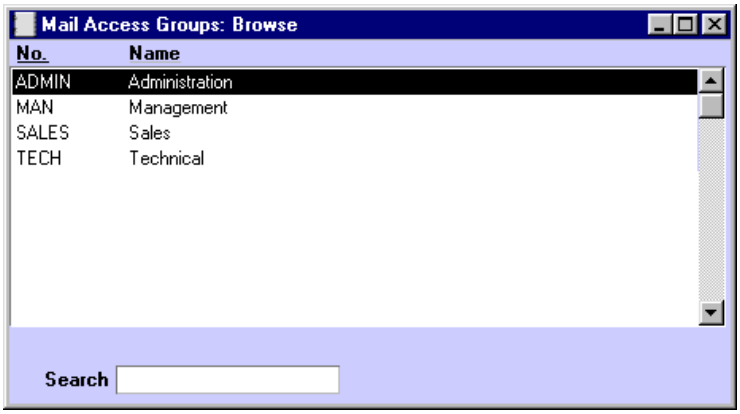


Access Groups are created using the Access Group register, described in Chapter 8, ‘System Module’.

Mail Access Groups

When setting up a mail system in FirstContact, you are likely to define a number of Mailboxes and Conferences. Mailboxes are personal: only their owners can view their contents. They can be used both to send and to receive Mail. Conferences are more public: unless there are access restrictions, their contents can be viewed by everybody. They can only receive Mail. For full details of Mailboxes and Conferences, please refer to the next two sections in this chapter.

If you want to establish a system of access restrictions for your Conferences, use the Mail Access Groups setting in the Technics module. Select ‘Technics’ from the Modules menu and click the [Settings] button in the Master Control panel (or select ‘Settings’ from the File menu). In the resulting list, double-click ‘Mail Access Groups’. This will open the ‘Mail Access Groups: Browse’ window which shows the Mail Access Groups that already exist.



Double-click an item in the list to modify it or click [New] to create a new record. In the ‘Mail Access Group: New’ window, you should enter a code and a short descriptive text. The code may contain up to five characters, and you may freely mix letters and numbers. Click the [OK] button in the Button Bar to save.

Once you have defined your Mail Access Groups, they can be specified in Mailboxes and Conferences. They will be used as follows. When a Person logs in, they are automatically granted access to their Mailbox. This is the Mailbox with their initials in its User field. This Mailbox will contain a list of Mail Access Groups. Each Conference also has a list of Mail Access Groups. The Person will be able to open any Conference that shares at least one Mail Access Group with their Mailbox (and any Conference whose list of Mail Access Groups is empty). If a Person is not granted access to view the contents of a Conference, they will still be able to send Mail to it.

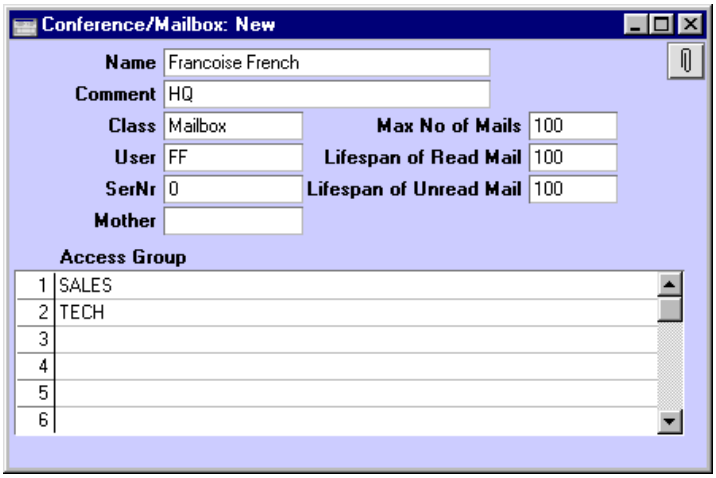
Do not confuse this setting in the Technics module with the Access Groups register in the System module. The latter is used to define access privileges to the various modules and functions in FirstContact and is described in Chapter 8, ‘System Module’.

Mailboxes

Each Person can have their own personal Mailbox, which they will use for sending and receiving Mail. This cannot be accessed by any other user, except by the system’s administrator through the Technics module.

To create Mailboxes, select ‘Technics’ from the Modules menu and click the [Settings] button in the Master Control panel (or select ‘Settings’ from the File menu). In the resulting list, double-click ‘Mailboxes’. This will open the ‘Conferences’ window which shows the Mailboxes that already exist. Click

the [New] button in the Button Bar to open the 'Conference/Mailbox: New' window—



Complete the fields as follows—

Name Enter the unique name by which the Mailbox is to be identified from elsewhere in FirstContact. Usually this will be the name of the Person owning the Mailbox. When Mail is sent to this Mailbox, this Name will be used as the address of the Mail. It will also be shown in the 'Paste Special' list of possible addresses. Make sure you type the name correctly because it can't be changed once the Mailbox has received Mail for the first time.

As shown in the example, it can be a good idea not to use special characters in this field. If you have a mixed network (Windows and Macintosh), special characters may not appear as expected on all machines or platforms.

Comment Any explanatory text about the Mailbox can be recorded here. This Comment is shown in the Who Is Online report.

Class Ensure this is set to "Mailbox" (the default).

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

Enter the Signature (initials) of the Person owning this Mailbox. Access to the Mailbox is only granted to this Person (and to system administrators with access to the Technics module).

Ser Nr This unique identifying number is generated automatically when the Mailbox is saved for the first time. It cannot be changed.

Mother This field is not used for Mailboxes.

Max No of Mails This field is used if you want to place a limit on the maximum number of Mails that can be stored in the Mailbox. Leave the field set to zero if you don't want to impose a limit, or if you want the Mailbox to obey the global limit set in the Mail Settings setting.

If a Mailbox contains more than the specified maximum number of Mails, the older Mails are not removed automatically. Instead, the 'Clean Up Mail Registers' Maintenance function in the Technics module should be used by the system administrator to carry out this task. This function deletes Mails (starting with the oldest) until the maximum is reached. In this case, Mails can be deleted even if their Lifespan (below) has not expired.

Lifespan of Read Mail, Lifespan of Unread Mail

These fields are used if you want to place a limit on the maximum number of days that Mails will remain in the Mailbox. The Lifespan of a Mail is calculated using the date it was last modified, not the date it was created. Leave the fields set to zero if you don't want to impose a limit, or if you want the Mailbox to obey the global limits set in the Mail Settings setting.

The 'Clean Up Mail Registers' Maintenance function can be used by the system administrator to remove Mails whose Lifespan has expired.

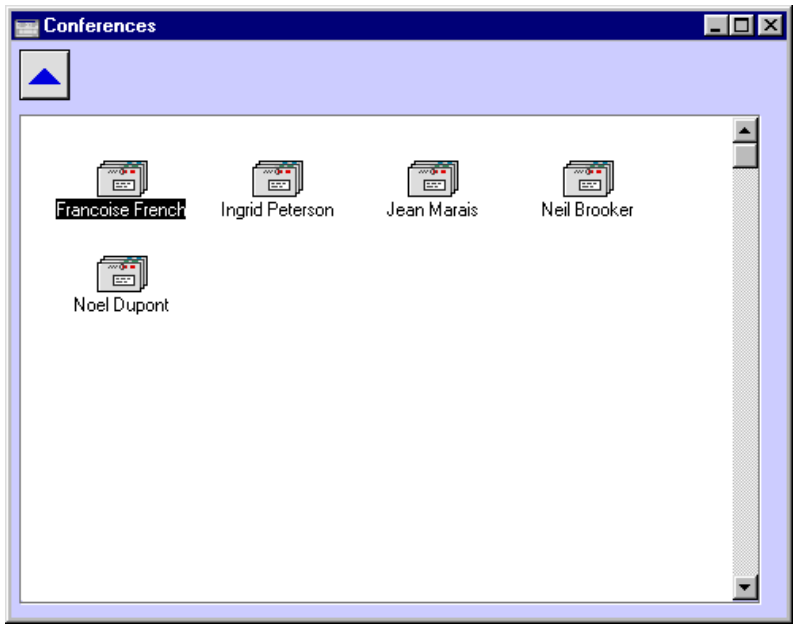
Access Group **Paste Special** Mail Access Groups setting, Technics module

Use the grid to grant access privileges to Conferences (Conferences are described in the next section). The owner of the Mailbox (the Person whose initials are shown in the User field) will be given access to any Conference that shares at least one Access Group with this list (and to Conferences whose list of Access Groups is empty).

For example, the owner of the example Mailbox in the illustration above will be able to view the contents of

any Conference belonging to the “Sales” or “Tech” Mail Access Group.

Save the Mailbox by clicking the [OK] button in the Button Bar. You are returned to the ‘Conferences’ window which now shows the Mailbox that you have just created.



Once they have been created, Mailboxes can only be modified in the Technics module. Open the ‘Conferences’ window as described earlier in this section and click on the Mailbox to be changed. Then, select ‘Properties’ from the Special menu. Make the changes as necessary and save in the usual way, or, to delete it, select ‘Delete’ from the Record menu. Mailboxes can only be deleted if they don’t contain any Mail. The contents of a Mailbox can be seen by double-clicking a Mailbox in the ‘Conferences’ window.

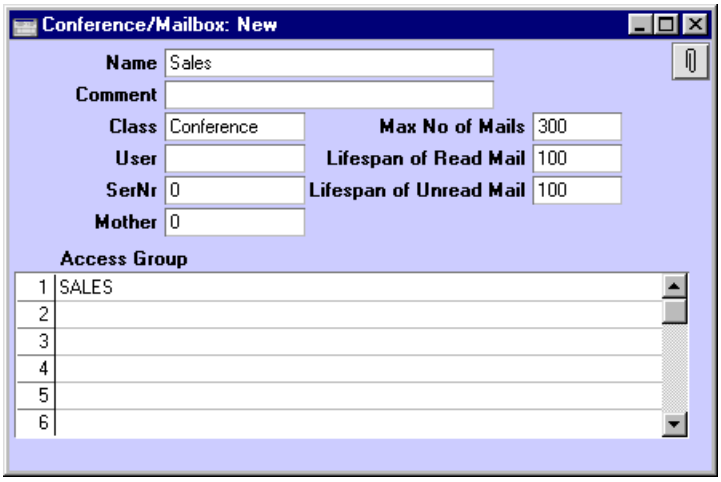
Conferences

Conferences are effectively public Mailboxes: unless there are access restrictions, their contents can be viewed by everybody. Unlike Mailboxes, they can only receive Mail. It is possible to set up a hierarchical system of Conferences within Conferences similar to the nested structure of folders and directories on your hard disk.

Before attempting to create Conferences, you must create at least one Mailbox as defined above and then quit FirstContact and restart. Then, click

the [Conferences] button in the Master Control panel, and then click [New] in the Button Bar. You do not have to be in the Technics module to do this, but you must have been granted access to the Technics module otherwise the [New] button will be disabled.

The ‘Conferences’ window opens, displaying the Conferences that already exist. To create a new Conference, click the [New] button in the Button Bar. The ‘Conference/Mailbox: New’ window opens. This is the same window that was used to create Mailboxes in the previous section. Except as described below the illustration, the fields are used in the same way as for Mailboxes.



Name Enter the unique name by which the Conference is to be identified from elsewhere in FirstContact. When Mail is sent to this Conference, this Name will be used as the address of the Mail. It will also be shown in the ‘Paste Special’ list of possible addresses. Make sure you type the name correctly because it can’t be changed once the Conference has received Mail for the first time.

Class **Paste Special** Choices of possible entries

This field should contain one of the following entries—

Conference, News, Billboard, Archive

Use one of these options if you want the Conference to be able to receive Mail. The only differences between the options are that they have different icons (shown in the illustration below) and different global attributes can be set in the

Mail Settings setting (Maximum Number of Mails and Lifespan).

Folder — Use this option if you want to establish a nested or hierarchical structure. A Folder can contain Conferences or more Folders. You cannot send Mail to a Folder.

Mailbox — This option should not be used here.

User — This field should be left blank: it is only used for Mailboxes.

Mother — If the Conference is to be contained inside a Folder (known as the "Mother" Folder), the Serial Number of the Mother Folder should be entered here. This is used to ensure the Conference appears in the correct place in the nested or hierarchical structure.

Before creating the Conference, double-click the Mother Folder in the 'Conferences' window to open it. When you then create the Conference, the Serial Number of the Mother Folder will appear here automatically.

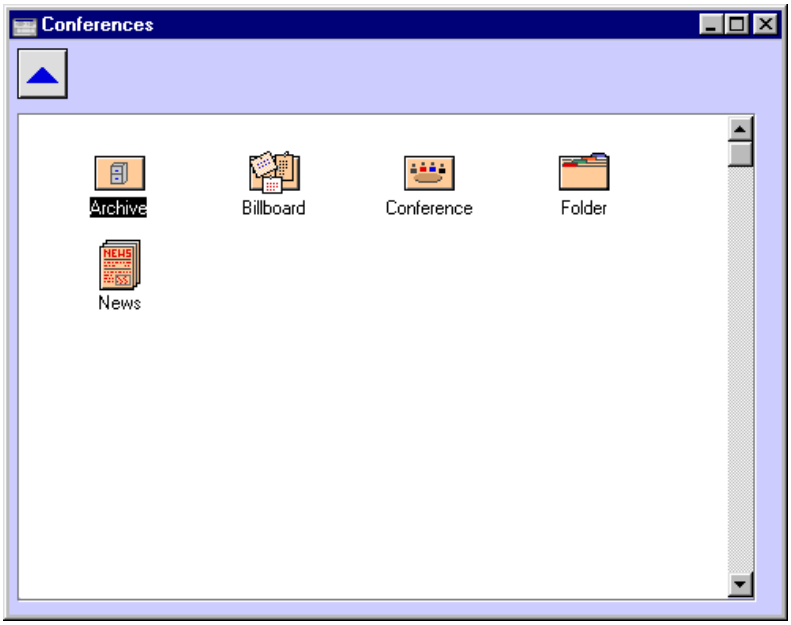
Access Group — **Paste Special** — Mail Access Groups setting, Technics module

Use the grid to list the Access Groups that are to be allowed access to the Conference. When a user attempts to open the Conference, FirstContact will compare the Access Groups listed in their Mailbox with those listed for the Conference. If there is at least one Access Group common to both, the Conference will be opened. If everybody is to have access to the Conference, leave the list empty.

For example, the Conference in the illustration above could be opened by any user whose Mailbox features "Sales" Mail Access Group in its list.

The Access Group grid can be used as described above for Folders as well as for the Conferences they contain. If this is done, all the Access Groups listed for a particular Conference should also be listed for its Mother Folder. Otherwise, a user might be given access to a Conference but will not be able to open the Folder to get to it.

Save the Conference by clicking the [OK] button in the Button Bar. You are returned to the ‘Conferences’ window which now shows the Conference that you have just created.

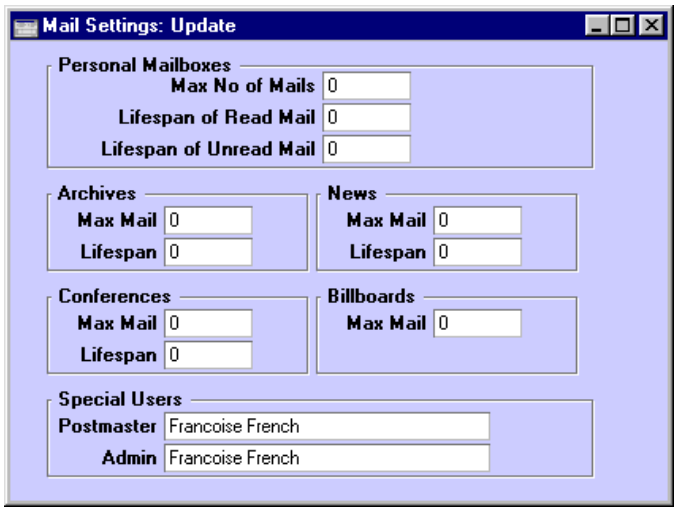


If the Conference has a Mother Number, you will have to open the Mother folder by double-clicking to see it. To get back to the top level, click the large arrow in the top left-hand corner.

Once they have been created, Conferences can only be modified by Persons with access to the Technics module. Open the ‘Conferences’ window as described earlier in this section and click on the Conference to be changed. Then, select ‘Properties’ from the Special menu. Make the changes as necessary and save in the usual way, or, to delete it, select ‘Delete’ from the Record menu. Conferences can only be deleted if they don’t contain any Mail. Folders can only be deleted if they are empty. The contents of a Conference can be seen by double-clicking it in the ‘Conferences’ window.

Miscellaneous Settings

Finally on the main server, a few miscellaneous settings should be considered. These are to be found in the Mail Settings setting in the Technics module.



Max Number of Mails, Max Mail

These fields are used if you want to place limits on the maximum number of Mails that can be stored in Mailboxes and in Conferences of different Classes. Leave the fields set to zero if you don't want to impose limits. These limits can be overridden for specific Mailboxes and Conferences.

If a Mailbox or Conference contains more than the specified maximum number of Mails, the older Mails are not removed automatically. Instead, the 'Clean Up Mail Registers' Maintenance function in the Technics module should be used by the system administrator to carry out this task. This function deletes Mails (starting with the oldest) until the maximum is reached. In this case, Mails can be deleted even if their Lifespan (below) has not expired.

Lifespan of Read Mail, Lifespan of Unread Mail, Lifespan

These fields are used if you want to place limits on the maximum number of days that Mails will remain in Mailboxes and in Conferences of different types. The

Lifespan of a Mail is calculated using the date it was last modified, not the date it was created. Leave the fields set to zero if you don't want to impose limits. These limits can be overridden for specific Mailboxes and Conferences.

The 'Clean Up Mail Registers' Maintenance function can be used by the system administrator to remove Mails whose Lifespan has expired.

Postmaster **Paste Special** Mailboxes and Conferences

Specify here the Mailbox or Conference that is to receive incoming external mail (email) that has been incorrectly addressed. This may be because of a typing error (including the use of special characters, which should not appear in email addresses), or because the recipient no longer works for your company. Such mail should be sent to a Postmaster for redirecting. Specify here the Mailbox or Conference that is to act as the Postmaster.

Usually, incoming mail with an incorrect address will only be received if the POP3 account is a multiple recipient account. If so, the External Gateway will receive all mail with the correct domain name (i.e. the part of the address after @ must be correct) and will try to find the correct Mailbox or Conference for it. If it fails, it will be sent to the Postmaster. If the POP3 account is a single recipient account, the service provider will return incorrectly addressed mail to the sender as not delivered. Therefore it will not be received by the External Gateway and so there will be no need to specify a Postmaster.

Admin **Paste Special** Mailboxes and Conferences

If the name of a Mailbox is specified here, its owner will be treated as the system administrator, able to make changes to Conferences and Mailboxes from a client machine. This Person must be given access to the Technics module, as described in point 2 of the section entitled 'The Technics Module' towards the beginning of this chapter.

External Mail

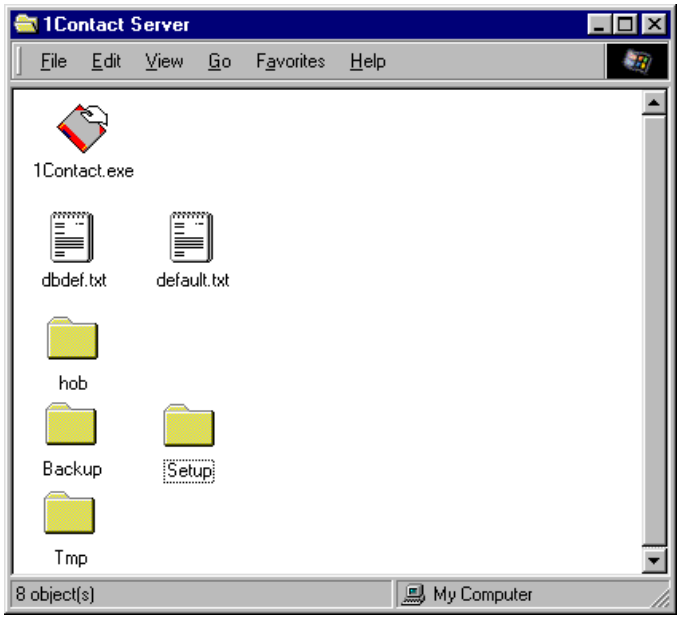
The sending and receiving of external mail (email) is handled by the External Gateway module. This sends external mail to your SMTP server when necessary and periodically checks your POP3 accounts for incoming mail. It also distributes this incoming mail to the appropriate Mailboxes and/or Conferences.

In smaller systems, a single copy of FirstContact can act as the server and as the External Gateway. In larger systems, it might be necessary to have the External Gateway on a separate computer because, if there is a large volume of external mail, the work of the External Gateway might cause other server tasks to be carried out more slowly.

The gateway machine should be connected to the internet (e.g. by modem or by permanent connection) and, if it is a separate machine, it should be connected to the server.

Follow the sections below to configure the Gateway, to allow FirstContact to send and receive external mail, as follows—

- If a single machine is acting as both the server and the Gateway, the work should be carried out on this machine.
- Otherwise, on the server machine, first make sure that the Person register contains a record with a Signature of “GATE”, as described in the ‘Persons’ section above. Then, select ‘Server’ from the Modules menu. The server will go into server mode and the ‘Server Status’ window will appear. Then, install FirstContact on the Gateway machine. Make sure that a folder named “Tmp” is present in the folder containing the FirstContact application. The External Gateway uses this to store mail attachments downloaded from the POP3 server before they are transferred to the “Attach” folder and attachments that are to be uploaded to the SMTP server.



Double-click the FirstContact application and create a new database as described in the ‘Logging on from a Client’ section in the first chapter of this manual. The purpose of this database is to allow the gateway to connect to the server, so create a single Company with the IP address of the server and Port Number that is the same as the Server Port in the Program Mode register on the server. Log in using “GATE” as the ID.

In both cases, ensure you are in the External Gateway module by selecting ‘External Gateway’ from the Modules menu. All windows are closed and the ‘Server Status’ window appears. Open the Master Control panel by pressing Ctrl-M or ⌘-M.

Incoming External Mail (POP3)

Email is received by logging in to a POP3 (Post Office Protocol, version 3) account and downloading unread mail to your computer. If you use FirstContact to read your incoming email, it will periodically and automatically log in to your POP3 account(s), download any unread mail and divert it to the appropriate Mailbox or Conference. This behaviour is controlled through the E-Mail POP3 Server and the E-Mail Alias registers in the External Gateway module.

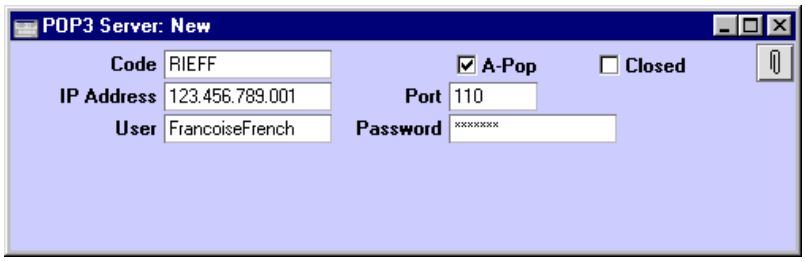
Receiving Incoming External Mail (the E-Mail POP3 Server register)

The E-Mail POP3 Server register should contain details (including address and password) of each of your POP3 accounts. Periodically, FirstContact will go through the records in this register one by one and log in to each account represented by those records. It will then receive any unread mail and distribute it to the appropriate Mailbox(es) or Conference(s) as specified in the E-Mail Alias register.

- If you are using single recipient POP3 accounts, you will have a separate POP3 account (i.e. a separate email address) for each member of staff or department. So, the E-Mail POP3 Server register will contain many records (one for each member of staff or department that has its own email address). As a further guide, make a note of all the email addresses that you entered as return addresses in the Person register (see the 'Persons' section above). Each one of these should have an equivalent record in the E-mail POP3 Server register.

- If you are using multiple recipient POP3 accounts, you may only have one POP3 account. In this case, the E-Mail POP3 Server register will only contain one record. Logging in to this one account will allow you to receive all mail sent to everybody in your company.

To create a POP3 Server record, ensure you are in the External Gateway module and click the [POP3 Servers] button in the Master Control panel (or select 'POP3 Servers' from the Registers menu). This will open the 'POP3 Servers: Browse' window which lists any records that have already been entered. Click the [New] button in the Button Bar to create a new record, or click on an existing one that is similar and click the [Copy] button. The 'POP3 Server: New' window opens—



Complete the window as follows—

Code Enter a unique identifying code for each POP3 Server record. Up to twenty characters can be used, and you may freely mix letters and numbers.

A-Pop Check this box if you usually log on to this account using A-Pop encryption.

Closed Check this box if the POP3 Server record is no longer used. This will stop the External Gateway checking the account for incoming mail.

IP Address If it is not already known, the IP Address of the POP3 account can be obtained by pinging the domain name.

Port Usually this will be 110. You may need to confirm this with your service provider.

User Enter the user's name, as defined in their email address. In our example in the illustration, Françoise French's POP3 account name (or email address) is FrancoiseFrench@RadioImportExport.com. Therefore, "FrancoiseFrench" (i.e. the part of the address before the @) has been entered in the User field. Note that special characters cannot be used in email addresses, so the ç in Françoise has been changed to c.

In the case of a multiple POP3 account, this field can be left blank.

Password Enter the password for this email address.

All this information can be obtained from your service provider or from the preferences in your standard mail software (e.g. Netscape, Internet Explorer, Eudora, etc).

Complete the POP3 Server record as appropriate, then save it using the [OK] button and close the window by clicking the close box. Repeat the process as many times as necessary by creating new records or copying existing ones. When the process is complete, close the browse window using the close box again.

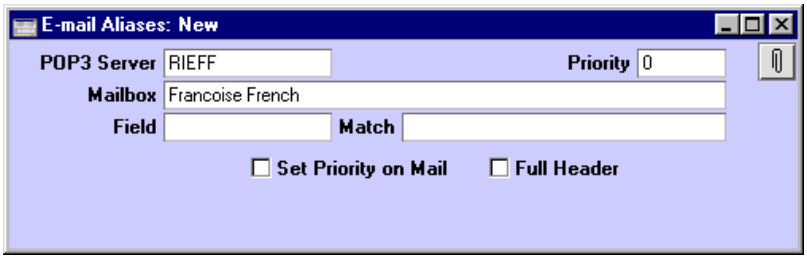
Connecting Incoming External Mail to Mailboxes (the E-Mail Alias register)

The E-Mail Alias register connects incoming email with FirstContact's Mailboxes and Conferences. FirstContact receives email by going through the records in the E-Mail POP3 Server register one by one and logging in to each account represented by those records. When mail is received from a particular account, FirstContact will then search for the Alias records that belong to that account. The mail is then distributed to the Mailbox(es) or Conference(s) specified in those Alias records. The recipient will then be able to read that email in the same way as they would internal mail that they have received from another member of staff.

- In the case of single recipient POP3 accounts, incoming email is addressed to a particular Person, so only a single E-Mail Alias is required to route that mail to the appropriate Mailbox. So, for each POP3 Server record, you should enter a single record in the E-Mail Alias register.

- In the case of multiple recipient POP3 accounts, incoming email can be addressed to any Person in the company, so it can be difficult to route that mail to the correct Mailbox. You may need four or five Alias records for each Mailbox and Conference. You should also name a Mailbox that is to act as Postmaster. This will receive any mail for which a home cannot be found. Do this in the Mail Settings setting in the Technics module.

To create an E-Mail Alias record, ensure you are in the External Gateway module, and click the [Aliases] button in the Master Control panel (or select 'Aliases' from the Registers menu). When the 'E-Mail Aliases: Browse' window opens, click the [New] button to create a new record.



POP3 Server **Paste Special** E-Mail POP3 Server register, External Gateway module

Enter the Code of a POP3 Server record here.

When email is received from this POP3 account, FirstContact will search for all Aliases with this Code and forward the email to the Mailbox specified in the field below.

If the POP3 account is a single recipient account, only one Alias record should be entered, allowing email to be forwarded to the correct Mailbox.

If the POP3 account is a multiple recipient account, there should be at least one Alias record for each possible recipient. The Field and Match will be used to establish which is the correct Mailbox for a particular email.

Mailbox **Paste Special** Mailboxes and Conferences

Email received from the POP3 account specified above will be forwarded to the Mailbox or Conference entered here.

Field, Match, Priority

The use of these fields will vary depending on whether the POP3 account specified above is a single- or multiple-recipient account

Multiple-Recipient POP3 Account

If the POP3 account specified above is a multiple recipient account, it can be difficult to establish who is the intended recipient, so there will be many Alias records relating to a particular POP3 account. These fields will be used to establish which Mailbox(es) should receive a particular email.

In this situation, it is perhaps easiest to describe these fields using an example. You have two Mailboxes in the name of “Francoise French” and “Neil Brooker”. First, you should anticipate receiving email addressed to various spellings of these names (“FFrench”, “Francoise”, “Francoise French”, “FrancoiseFrench”, etc). Such email is clearly intended for the “Francoise French” Mailbox. For this email, enter separate Alias records as follows—

Field	Match	Mailbox
Recip or Recvd or To	Francoise French	Francoise French
Recip or Recvd or To	FFrench	Francoise French
Recip or Recvd or To	Francoise	Francoise French

The address used by the sender (the part of the address before @) is entered in the Match field, and “Recip or Recvd or To” should be entered as the Field by using ‘Paste Special’ and selecting the final option. For example, email addressed to “FFrench@RadioImportExport.com” will be forwarded to the “Francoise French” Mailbox by the Alias record with “FFrench” as the Match.

Similar Aliases should then be created for the "Neil Brooker" Mailbox. Because email addressed to Francoise French and Neil Brooker is clearly intended for their Mailboxes, these Aliases can be given a high Priority, so enter a low number such as 1 in the Priority field in all these Aliases.

Second, you might want to anticipate receiving email addressed to a department such as "Sales" or "Support". If so, you can create further Alias records with "Sales" and "Support" as the matches. This email can be forwarded to a particular Mailbox, a particular Conference, or any number of Mailboxes and Conferences. For example, email addressed to "Sales@RadioImportExport.com" is to be forwarded to both Mailboxes and to a Conference named "Prospects", so create Aliases as follows—

Field	**Match**	**Mailbox**
Recip or Recvd or To	Sales	Francoise French
Recip or Recvd or To	Sales	Neil Brooker
Recip or Recvd or To	Sales	Prospects

Providing all these Aliases have the same Priority, email addressed to "Sales" will be forwarded to both Mailboxes and the Conference.

Finally, you might want to anticipate receiving email where the recipient is not so clear. A 'Paste Special' list is available from the Field field, offering the following options: All Mails; Recipient; Sender; Subject; Body; and Recip or Recvd or To. For example, if you know that all email from a particular sender is intended for Neil Brooker, you can enter an Alias record to this effect, with "Sender" as the Field, the sender's address as the Match and "Neil Brooker" as the Mailbox. "All mails" should not be entered as the Field: this option should only be used with single recipient POP3 accounts.

You might also enter some Aliases as follows—

Field	Match	Mailbox
Body	Francoise French	Francoise French
Body	Neil Brooker	Neil Brooker

Such Aliases should be given a lower Priority (i.e. a higher number should be entered in the Priority field) than those above. They are intended to catch email with unknown addresses by finding names in the email text. So, email with an unknown address whose text contains the phrase "Neil Brooker" will be sent to his Mailbox. But, if the address is "FFrench@RadioImportExport.com", it will be sent to her Mailbox because the Alias with "FFrench" as the Match has a higher Priority. It is not absolutely necessary to enter such Aliases, as you may prefer to deal with the issue by having such email sent to the Postmaster. The Postmaster receives all email for which no Alias exists. He or she should read the email and forward it to the correct Mailbox or Conference manually. A Mailbox should be named as the Postmaster in the Mail Settings setting in the Technics module.

Note: the "Recip or Recvd or To" option is so named because the name of the field in an email containing the address can vary depending on the email program used by the sender. "Recip or Recvd or To" provides a means of checking for fields with each of these three names from a single Alias record. This option is therefore easy to maintain: an alternative method requiring three Aliases is more difficult to maintain—

Field	Match	Mailbox
Recipient	Francoise French	Francoise French
Recipient	FFrench	Francoise French
Recipient	Francoise	Francoise French
Received	Francoise French	Francoise French
Received	FFrench	Francoise French
Received	Francoise	Francoise French
To	Francoise French	Francoise French
To	FFrench	Francoise French
To	Francoise	Francoise French

Single-Recipient POP3 Account

If the POP3 account specified above is a single recipient account, incoming email is addressed to a particular Person, so only a single E-Mail Alias record is required to route that mail to the appropriate Mailbox. This should be configured as follows—

Field	Match	Mailbox
All mails	(blank)	name of Mailbox or Conference

Set Priority on Mail

Check this box if you would like email that has been forwarded by a particular Alias to have its Priority box checked when it appears in the recipient's Mailbox.

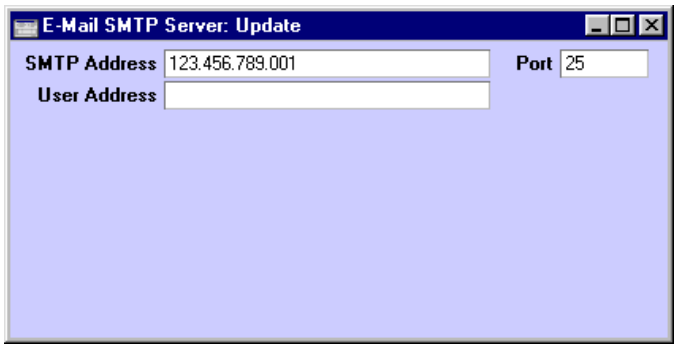
Full Header Emails usually contain information such as the email address of the sender, the time it was sent and the servers it has passed through. This is known as header information and is usually visible at the end of the email text. FirstContact distributes email by creating new Mail records and copying in the email text. If you would like this header information to be copied in as part of the email text, check this box.

Complete the E-Mail Alias record as appropriate, then save it using the [OK] button and close the window by clicking the close box. Repeat the process as many times as necessary by creating new records or copying existing ones. When the process is complete, close the browse window using the close box again.

The Technics module contains a report allowing you to print out a list of E-Mail Aliases for each user. It also lists users that don't have Mailboxes, and users that have Mailboxes but not E-Mail Aliases.

Outgoing External Mail (SMTP)

The SMTP (Simple Mail Transfer Protocol) server is used for outgoing mail. The E-Mail SMTP Server register in the External Gateway module allows you to define a single SMTP Server, to which the External Gateway will send all your external mail.



SMTP Address — If it is not already known, the IP Address of the SMTP server can be obtained by pinging the domain name. Usually it will be the same as that for the POP3 server.

Port — Usually this will be 25. You may need to confirm this with your service provider.

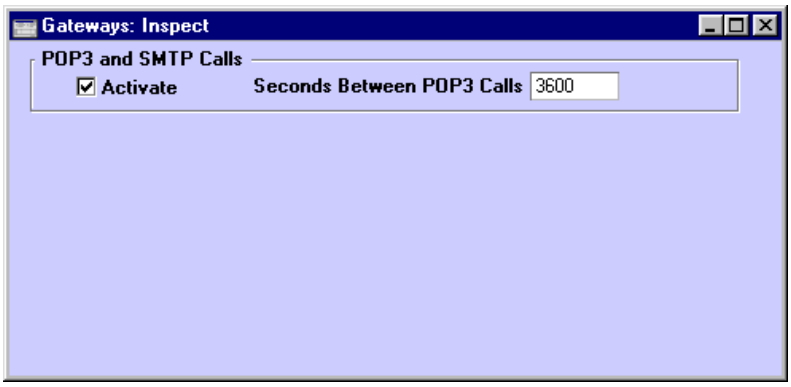
User Address — Specify here the outgoing mail server user name (if any).

All three pieces of information can be obtained from your service provider or from the preferences in your standard mail software (e.g. Netscape, Internet Explorer, Eudora, etc).

When the setting is complete, click the [OK] button in the Button Bar to save and close the window.

Activating the External Gateway

To activate the External Gateway, ensure you are in the External Gateway module and click the [Gateways] button (or select 'Gateways' from the Registers menu). The 'Gateways: Inspect' window opens—



Specify in seconds how often the External Gateway is to check for incoming mail. A typical setting will be 3600 seconds (one hour). It is not recommended to check for mail much more frequently than this. Checking for mail makes heavy demands on the server and so other tasks will be completed more slowly than usual.

Finally, check the Activate box. Then, save and close the window by clicking [OK] in the Button Bar.

Backing up the Gateway

If the External Gateway is on a separate machine to the main server, information in the E-Mail POP3 Server, E-Mail Alias and E-Mail SMTP Server registers is stored in the database on the Gateway machine, not on the main server. This means the Gateway must be backed up separately.

If the Gateway has not been backed up before, a second Company must be created, to be used for backing up only. Follow these steps—

1. Select 'Company' from the File menu. The 'Select Company' window appears. Select 'Open Company Register' from the Special menu.

2. The 'Companies: Inspect' window appears. On the second row, enter a new Company. This should be a local Company, so leave the TCP/IP and Port fields blank.

3. Save the new Company by clicking the [OK] button in the Button Bar. For security reasons, FirstContact quits automatically. Restart FirstContact, and choose to use the new, second, Company. You might

wish to enter a single record in the Person register with a password, again for security reasons.

If the Gateway has been backed up before and the second Company already exists, you must change from the Gateway Company to the second Company before backing up. Gateway information will not be included in any back-up made from the main Gateway Company. Follow these steps—

1. If the Gateway is running, quit FirstContact.

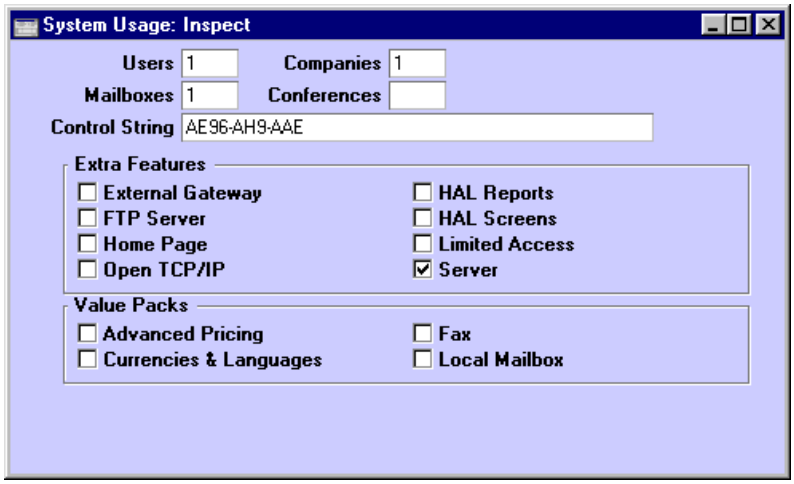
2. Restart FirstContact and choose to use the second Company. You cannot change Companies using the 'Company' function on the File menu because the two Companies are on different machines.

In both cases, you can now back up the Gateway machine. This is done in the usual way, by using the 'Database Text Backup' Export function in the System module. E-Mail POP3 Server, E-Mail Alias and E-Mail SMTP Server information is stored at the database level, not the Company level, so do not use the 'Company Text Backup' Export function.

External Mail in a Single-User Installation

If you have a single-user installation of FirstContact, it is unlikely that you will want to use the internal mail facility. However, you may still wish to use it to send and receive external mail (email). If so, follow these steps to configure FirstContact—

1. In the System Usage setting in the System module, ensure you have access to the Server module and that the number of Mailboxes is set to one—



Checking the Server box gives you access to the Technics module, which you will use to configure FirstContact to send and receive external mail. You can grant yourself access to the External Gateway module as well, but it is not necessary.

2. Make sure the Person register in the System module contains a single record for yourself.

3. Use the Modules menu to enter the Technics module. Following the instructions in the 'Mailboxes' section earlier in this chapter, create a single Mailbox for yourself.

4. Following the instructions in the section above entitled 'Receiving Incoming External Mail (the E-Mail POP3 Server register)', enter an E-Mail POP3 Sever record to represent your POP3 account. E-Mail POP3 Sever records can be entered using the register in the External Gateway module (if you gave yourself access to the External Gateway module in step 2) or using the setting in the Technics module.

5. Refer now to the section above entitled 'Connecting Incoming External Mail to Mailboxes (the E-Mail Alias register)' and follow the instructions to enter E-Mail Alias records to link your POP3 account to your Mailbox. Again, this can be done using the register in the External Gateway module (if you gave yourself access to the External Gateway module in step 2) or using the setting in the Technics module.

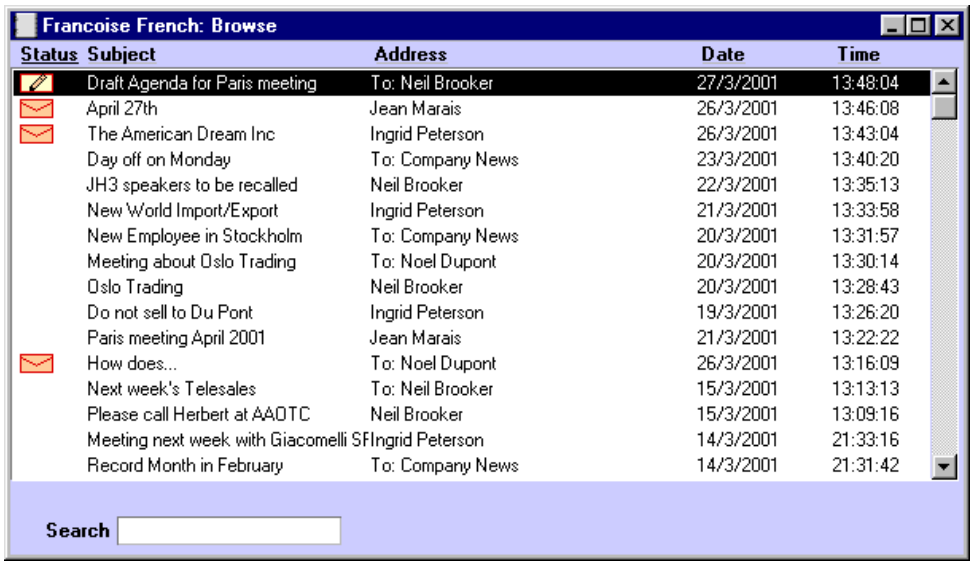
6. Move on to the section above entitled 'Outgoing External Mail (SMTP)' and follow the instructions to configure the E-Mail SMTP Server record with the address of the server to which your outgoing mail should be sent. Again, this can be done in the External Gateway module or the Technics module.

7. You will now be able to send and receive email.

Sending and Receiving Mail

The contents of your Mailbox are visible in the area on the right of the Master Control panel. You can read Mail from this list by double-clicking, and you can send Mail, by clicking the [New] button in the Button Bar. The following description assumes you have opened your Mailbox and are working from the resulting browse window, but you can use the features as described when working from the Master Control panel as well.

To open your Mailbox, click the [Mailbox] button in the Master Control panel. If the Master Control panel is the active (front) window, you can also press Ctrl-Shift-M (Windows) or ⌘-Shift-M (Macintosh). The following window is opened, listing all Mail that you have sent and received—

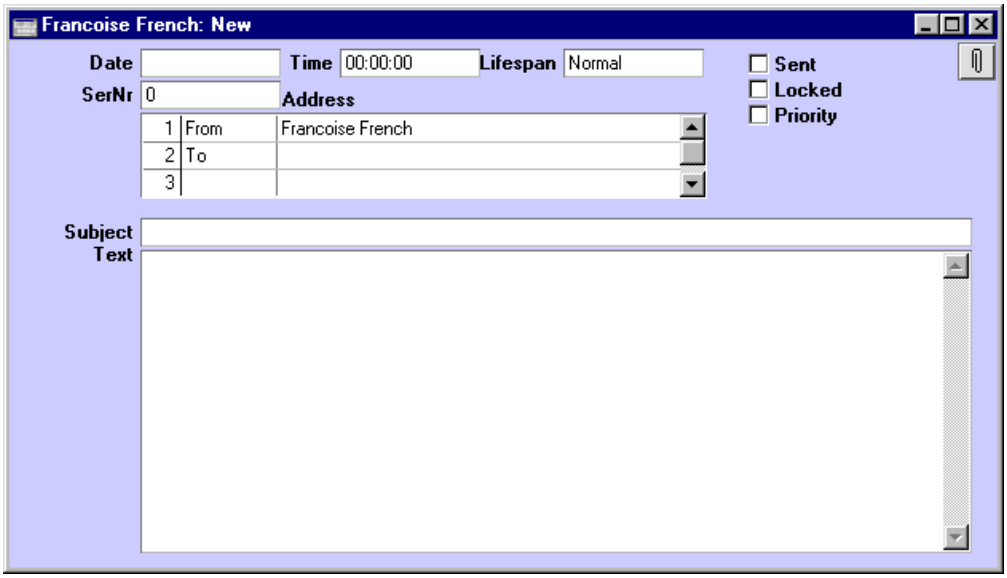


Mail is sorted in Serial Number order (i.e. in the order in which it was originally created). If a Mail is modified, it will remain in the same position in the list: to see the Mails that have been recently changed, sort the list by date (click the heading of the Date column twice to do this, so that the most recently modified Mails come to the top of the list). It is recommended that once you have sorted by date, you select ‘Save Position’ from the Window menu. This will mean that each time you open your Mailbox, it will remember this sort order so the most recently modified Mails will always be at the top of the list.

The Status column can contain the following symbols—

(blank)	The Mail has been sent or read.
	The Mail has one that you have not yet read, or it has been changed by somebody else since you last read it.
	The Mail is one that you have written but not yet sent.

Double-click a Mail in the list to read or edit it, or create a new Mail by clicking the [New] button in the Button Bar. You can also use the Ctrl-N (Windows) or ⌘-N (Macintosh) keyboard shortcut. If you want to create a Mail by copying a similar one, you must open the old Mail first before you can click [Copy] on the Button Bar.



Date The date the Mail was last modified. This is updated automatically by FirstContact and cannot be changed. The date is taken from the server.

Time The time the Mail was last modified. This is updated automatically by FirstContact and cannot be changed. The time is taken from the server.

Lifespan **Paste Special** Choices of possible entries

This field is used to determine how long the Mail is to remain in the system. The ‘Clean Up Mail Registers’ Maintenance function in the Technics module can be

used regularly by the system administrator to remove old Mail. The possible entries are—

Normal The Mail will be deleted by the 'Clean Up Mail Registers' function once its Lifetime has expired. The Lifetime of a Mail is calculated from the date it was last modified and can be specified for each Mailbox or globally using the Mail Settings setting.

Never Remove The Mail will not be deleted by the 'Clean Up Mail Registers' function.

If a Maximum Number of Mails has been set for a Mailbox and it contains more than this number of Mails marked as Never Remove, the 'Clean Up Mail Registers' function will remove all other Mails (i.e. those marked as Normal and Remove Next Day) each time it is run.

Remove Next Day The Mail will be deleted by the 'Clean Up Mail Registers' function the next time it is run.

The Lifespan of a Mail can be changed at any time, unless the Mail has been Locked.

Sent Click this box to send the Mail. When the Mail is next saved, it will appear immediately in the Mailboxes of the specified recipients, with the 'envelope' icon signifying that the recipient has not read it.

If you delete a sent Mail from your Mailbox, it will remain in its recipients' Mailboxes even if it has not yet been read.

If at least one recipient is an email address, you should send the Mail to them by selecting 'Send E-mail' from the Special menu once the Mail has been marked as Sent and saved.

Locked Once a Mail has been marked as Locked and saved, it can no longer be changed, even by its author. However, it can still be deleted by both author and recipient, and will be deleted by the 'Clean Up Mail Registers' function when its Lifetime expires.

Priority Check this box if you want to indicate to the recipient that the Mail is to be treated as high priority.

SerNr The unique identifying number assigned to the Mail by FirstContact when it is saved for the first time. This cannot be changed.

Address **Paste Special** Mailboxes and Conferences

The name of the Mailbox or Conference to which the Mail is to be sent. A single Mail can be sent to up to 99 Mailboxes, Conferences and email addresses. Once a Mail has been read, it can be forwarded to other Addresses by its author or recipient, simply by adding the new Address to the end of the list.

If you know the first few characters of the recipient, enter these and press Return. Their full name will appear.

If you are sending external mail, type in the full email address(es) of the recipient(s) in this list.

The name of your Mailbox is brought in automatically to the first line of this list, and is shown as the sender.

The column to the left of the Address can be changed to show “To:”, “From:”, “Cc:” or “Bcc:” as appropriate. ‘Paste Special’ can be used to choose one of these options. “Bcc” (blind carbon copy) is only relevant when sending external mail: each recipient of internal mail can see the full list of recipients.

Subject The title of the Mail, or a summary of its contents, which will appear in the Mailbox browse window.

Text The text of the Mail. There is space for about 7,500 characters. Once a Mail has been read, its Text can be changed by its author or any recipient.

Sending Mail

As you write a Mail, particularly if it is a long one, you might want to save it periodically for safety, but you might not want its recipients to see it while it is unfinished. To do this, write the mail and list the recipients, but do not check the Sent box. You can close the Mail and return to it another day, and print it out for checking. It will retain the ‘pencil’ icon in your Mailbox, signifying that it has not yet been sent.

When you are satisfied that the Mail is finished, check the Sent box and save it. It will immediately appear in the Mailboxes of its recipients. It will no longer be marked with the ‘pencil’ icon in your Mailbox, but it will be marked with the ‘envelope’ icon in all the recipients’ Mailboxes, signifying that they have not yet read it.

Sending External Mail

If at least one recipient is an email address, they will not receive the Mail automatically once it has been marked as Sent and saved. Instead, you should select ‘Send E-mail’ from the Special menu after the Mail has been saved. This will cause the Mail to be sent to the specified email address. If changes to the Mail are not saved before this function is used, the most recently saved version of the Mail will be sent. The Mail will be sent even if the Sent box is not checked, but it is recommended that this box is checked, to remove the ‘pencil’ icon from the Mail in your Mailbox.

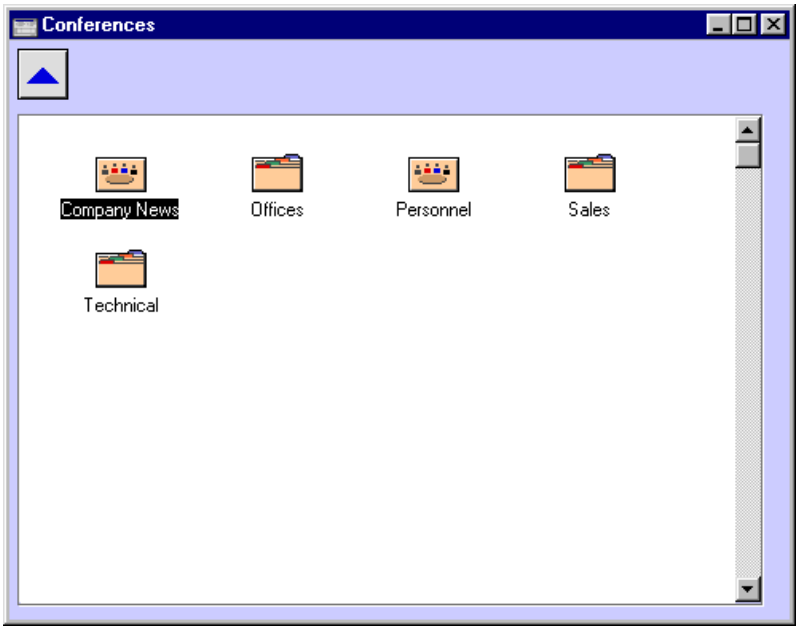
The ‘Send E-mail’ function places the Mail into an E-Mail Queue. This Queue is processed as follows—

Multi-user Once you have activated the External Gateway as described earlier in this chapter, it will check the E-Mail Queue periodically. Any Mail in the Queue will be sent automatically.

Single-user In a single-user system, email should be sent manually. To do this, bring the Master Control panel to the front and select ‘Send and Receive E-Mail’ from the Special menu. Depending on how your computer has been configured, you may have to establish a connection to the internet first. All Mail in the Queue will then be sent, and any incoming mail will be downloaded from your POP3 account as well.

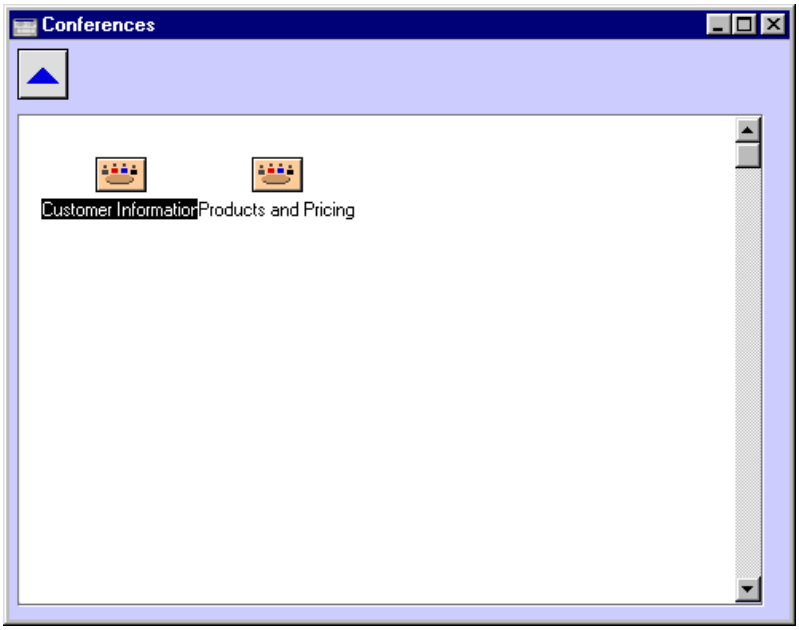
Mail and Conferences

Mail in Conferences can be read in much the same way as that in your Mailbox, as described above. To gain access to your Conferences, click the [Conferences] button in the Master Control panel. The ‘Conferences’ window opens, showing the Conferences and folders in alphabetical order.



To open a Conference or folder, double-click its icon.

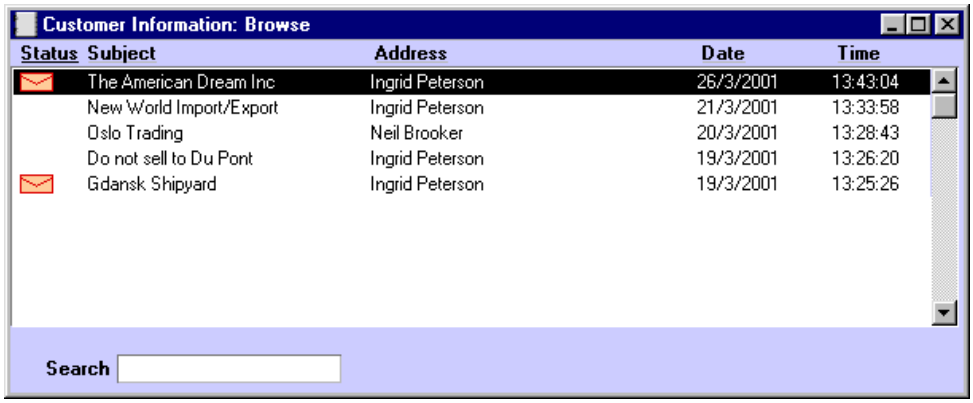
If a folder is opened, its contents are then shown. In this example, the “Sales” folder has been opened to reveal two Conferences—



To get back to the top level, click the large arrow in the top left-hand corner.

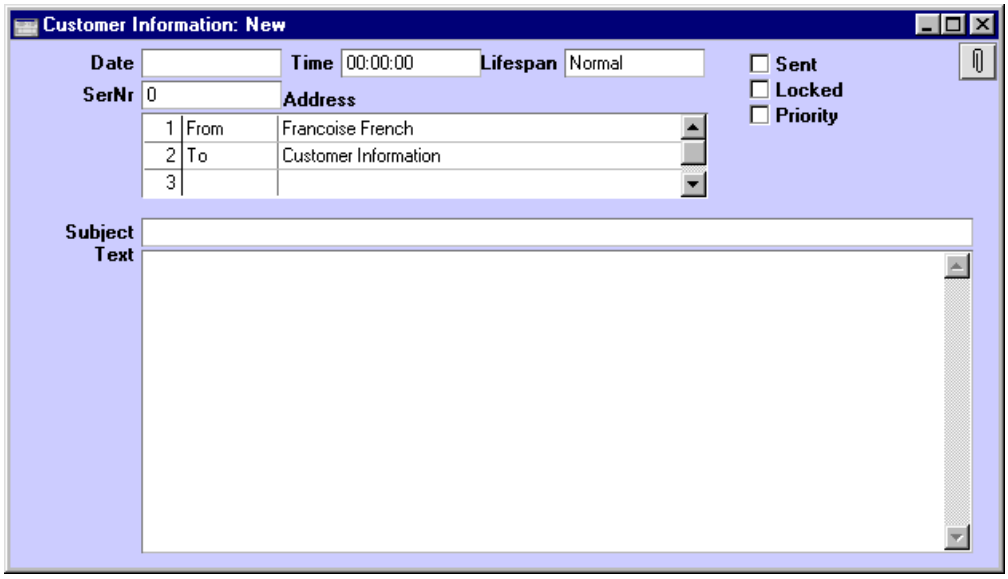
If a Conference is opened, a browse window opens, listing its Mails in Serial Number order. The title of the browse window shows the name of the Conference. As with your Mailbox, if you choose ‘Save Position’ from the Window menu after sorting by date, this will mean that the most recently modified Mails will always be at the top of the list. ‘Save Position’ applies to each Conference separately, so that you can save different sort orders or different window sizes for each Conference.

If you do not have access rights to the Conference, it will not open when you double-click its icon.



Mail that you have not yet read will be shown with the 'envelope' icon. To read a Mail, double-click it in the list. Once you have read it, you can add your comments, as described in the 'Replying to and Amending Mail' section below.

You can send a new Mail to the Conference while its browse window is open. Click the [New] button in the Button Bar: a new Mail window opens—

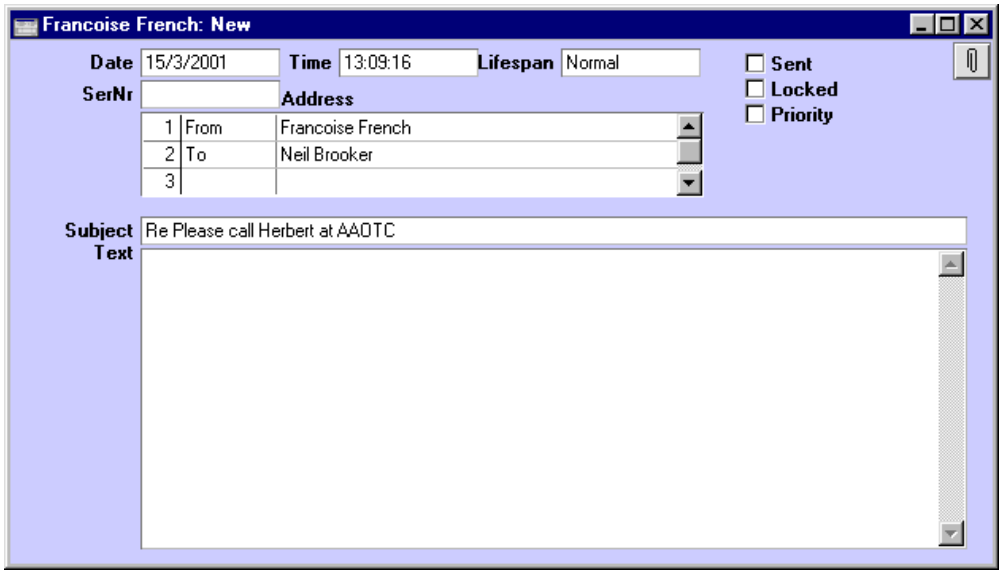


Note that the name of your Mailbox is shown as the sender, and the name of the Conference is the first recipient. Complete the Mail in the same manner as described earlier in this section, add more recipients if necessary, check the Sent box and save. The Mail immediately appears in the Conference's

browse window, without the ‘envelope‘ icon for you (the author) but with one for all other users.

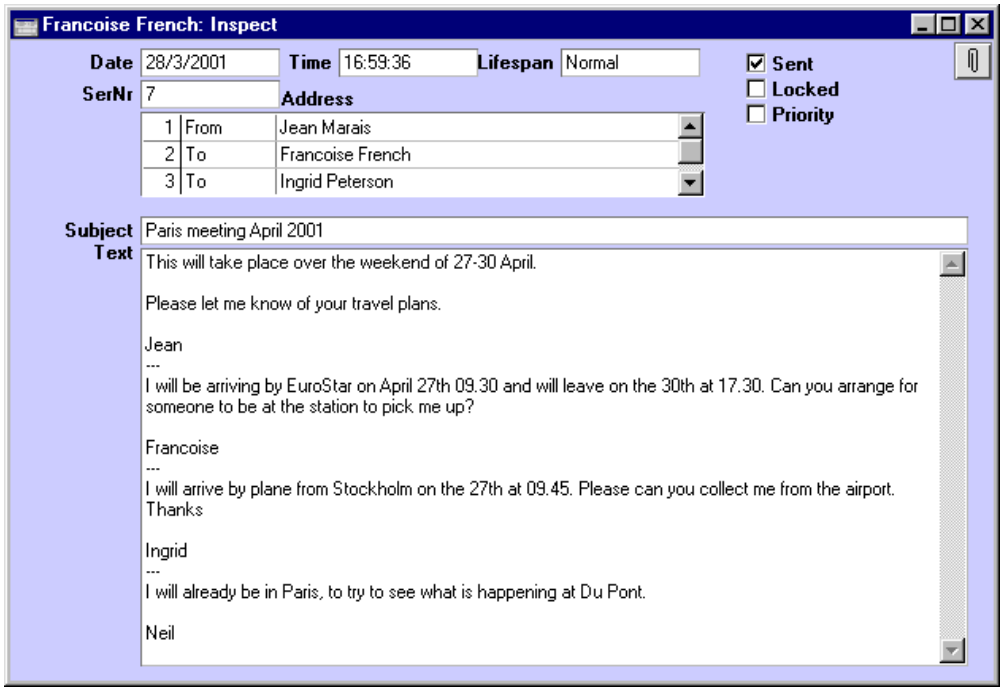
Replying to and Amending Mail

To reply to a Mail, open it and select ‘Reply‘ from the Special menu. A new Mail is created, in which the From and To Addresses are reversed and the Subject prefixed with the text “Re ”—



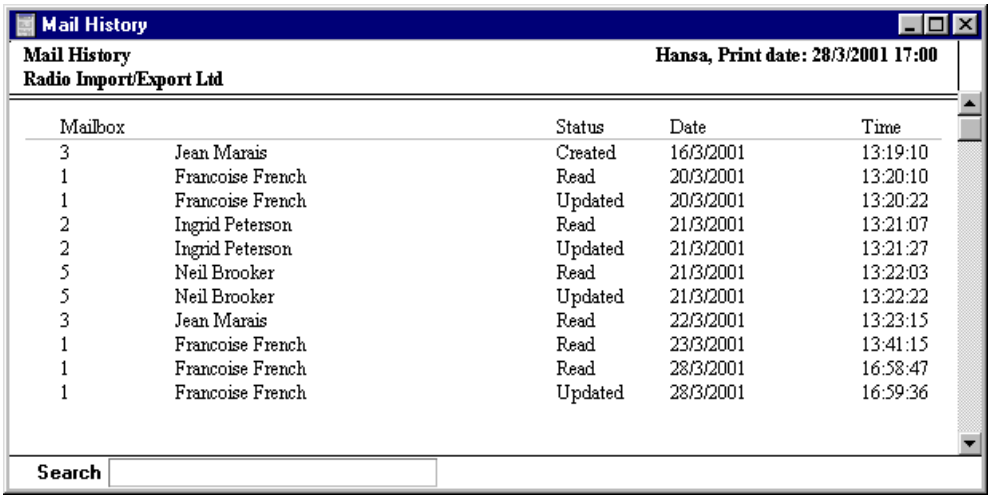
The reply is shown in a window entitled ‘New’, meaning that it has not yet been saved. Complete and send the Mail in the manner described above, or, if you no longer require the Mail, click [Cancel].

The ‘Reply’ function is likely to be used for replying to external mail only, because there is no need to reply by creating new Mails. Instead, internal mail can be amended by any of the recipients, so there is no need to read several Mails to keep track of a discussion. This is the case for all Mails, but is especially useful if the Mail has been sent to a Conference where it can be read and discussed by many people.



Whenever an amendment is made and the Mail saved, it will appear as unread (with the 'envelope' icon) in the Mailboxes of all other recipients. If the Mail is in a Conference, it will appear as unread to all other users, so that they are aware that a change has been made since they last read it.

When changing Mails in this manner, it is recommended that all changes be accompanied by the date of the change and the person's initials, otherwise the sense of the Mail and the order of the changes can be lost. If this happens, it can be helpful to look at the History of the Mail. Highlight it in the Mailbox browse window or open it and select 'History' from the Special menu. This report will show who has read and amended the Mail and when.



Mailbox		Status	Date	Time
3	Jean Marais	Created	16/3/2001	13:19:10
1	Francoise French	Read	20/3/2001	13:20:10
1	Francoise French	Updated	20/3/2001	13:20:22
2	Ingrid Peterson	Read	21/3/2001	13:21:07
2	Ingrid Peterson	Updated	21/3/2001	13:21:27
5	Neil Brooker	Read	21/3/2001	13:22:03
5	Neil Brooker	Updated	21/3/2001	13:22:22
3	Jean Marais	Read	22/3/2001	13:23:15
1	Francoise French	Read	23/3/2001	13:41:15
1	Francoise French	Read	28/3/2001	16:58:47
1	Francoise French	Updated	28/3/2001	16:59:36

All changes to a Mail must be saved before you can view its History.

Marking Mail as Not Read

You can mark any Mail in your Mailbox or in a Conference as unread. You might want to do this so that it retains the ‘envelope’ icon as a reminder to read it again or to act on it at a later date. To do this, highlight the Mail in your Mailbox or Conference browse window and select ‘Mark as not read’ from the Special menu. You can also select ‘Mark as not read’ from the Special menu when the Mail is open.

You cannot mark a Mail as not read if you are the last person to have changed it.

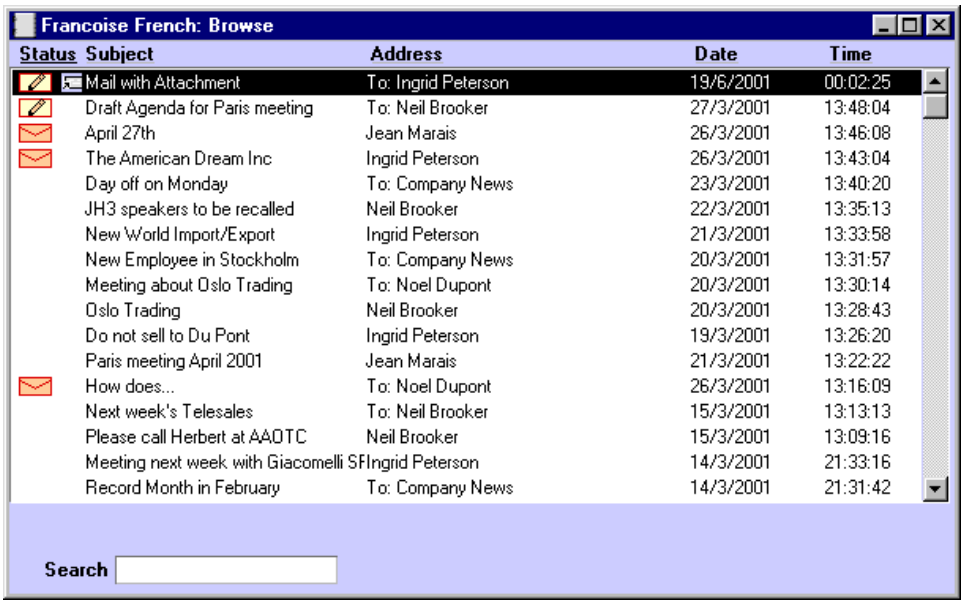
Attachments

Files, notes and other FirstContact records (including other Mails) can be attached to a Mail using the [Attachments] button with the paper clip icon. This can take one of two forms—

These connected objects are known as “Attachments” and this feature is universal in FirstContact. Please refer to the ‘Working with Records’ section in Chapter 2, ‘FirstContact’s Work Area’, for full details. Remember that a folder or directory named “Attach” must be present in the FirstContact server folder if you want to use Attachments, and that a folder named “Tmp” should also be present on the Gateway machine if you will be sending or receiving

external mail with Attachments. A Mail must have been saved at least once before any Attachments can be added to it.

Mails with Attachments have an extra icon in the Mailbox and Conference browse windows—



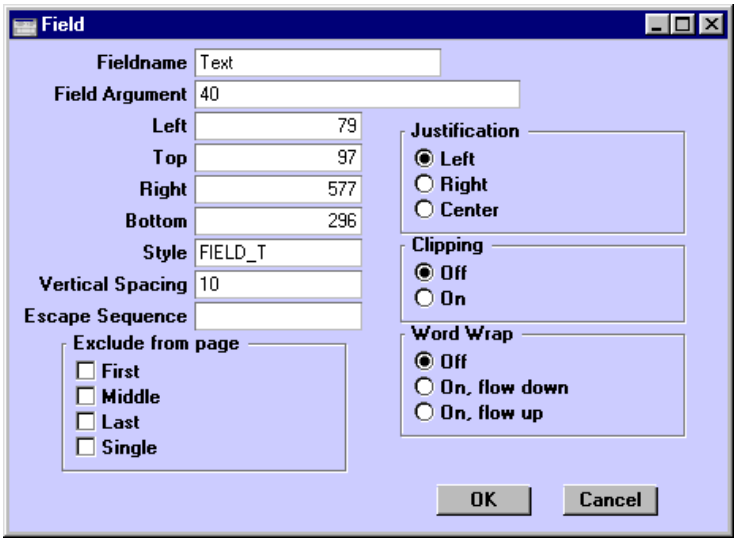
Printing Mail

To print a Mail, open it and click the Printer icon in the Button Bar or select ‘Print’ from the File menu.

The Form used is determined as follows—

1. Using the Form register in the System module, design the mail document and name it “MAIL”. Use the ‘Properties’ function on the Special menu to assign a Document Type of “Mail Form”. A sample Form is supplied with FirstContact: this can be modified to suit your requirements.

   To include fields, click the [Fields] button 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. In the case of the field representing the Mail text itself and that representing the addressees, since they are likely to extend over more than one line, it is necessary to make an entry in the Spacing field. If this is left at 0 (the default), all the lines of text will be superimposed on one another. If the Style is 10 point Times, a Spacing of at least 10 points is recommended.



Full instructions for using the Form register can be found in Chapter 8, 'System Module'.

2. Remaining in the System module, select 'Documents' from the File menu. The 'Documents' list window is opened: highlight 'Mail'.

3. Select 'Define Document' from the Special menu.

4. In the subsequent window, enter "MAIL" in the Form field of the first line (you can use 'Paste Special' to ensure the spelling is correct).

5. Click [OK] to save the Mail Form definition. From now on, the mail form that you have designed will be used whenever a Mail is printed.

Saving Mail

You can save the text of a Mail as a text file. To do this, open the Mail and select 'Save Text as File' from the Special menu. The usual 'Save File' dialogue appears, allowing you to name the file and place it on your hard disk. The Mail's Subject is used as the default file name. If the Subject is too long, it will be truncated, and FirstContact will beep. The Subject will also appear as the first line in the resulting text file.

Saving a Mail as a text file can be useful because—

1. You want to keep a record of the Mail before it is removed by the 'Clean Up Mail Registers' Maintenance function.

2. You want to amend the Mail at leisure off-line. In this case, open the text file in a word processor and make the necessary amendments. Then, copy the text (omitting the first line which is the Subject of the Mail), return to the Mail in FirstContact. Place the cursor in the Text field, choose ‘Select All’ from the Edit menu (Ctrl-A or ⌘-A) and then paste in the copied text.

Deleting Mail

To delete a Mail, highlight it in your Mailbox browse window and select ‘Delete’ from the Record menu. You can also select several Mails (hold down the Shift key to select a range of Mails in the list) and delete them all at once. You cannot delete Mails from Conferences in this way.

If you delete a Mail that has been sent, it will be deleted from your Mailbox only. It will remain in its recipient Mailboxes and Conferences even if it has not yet been read. If you want to delete a Mail from all Mailboxes and Conferences, remove the check from the Sent box before deleting.

You cannot undo the deletion of a Mail.

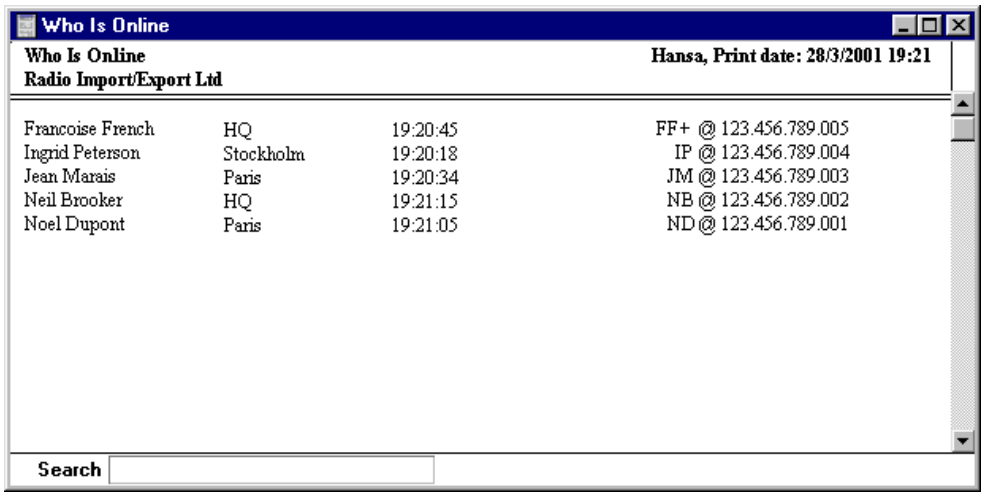
Chat

The Chat facility allows any user to have a conversation with any other user, providing they both have Mailboxes. These conversations are not saved in the database. There is no limit to the number of users that can take part in a Chat, and a single user can participate in more than one chat simultaneously. Chats are not visible to those not taking part or to the system administrator.

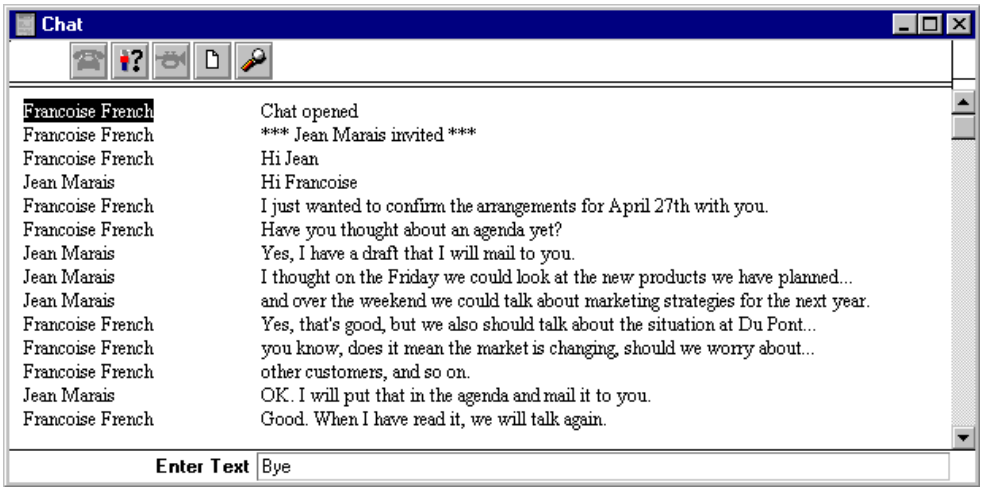
To start a Chat, proceed as follows—

1. Bring the Master Control panel to the front by pressing the Ctrl-M (Windows) or ⌘-M (Macintosh) keyboard shortcut. Alternatively, use the 'Master Control' function on the File menu.

2. To find out who is currently logged in to FirstContact, click the [Communicate] button or select 'Communicate' from the Special menu. The keyboard shortcut Ctrl-Shift-W or ⌘-Shift-W can also be used. The 'Who Is Online' report appears, showing who is currently logged in together with the time of their last action and their IP address.



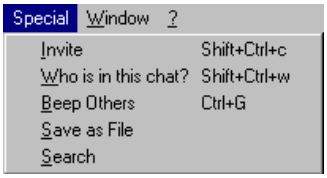
3. To start a Chat with someone, double-click on their name in the report. The Chat window opens.



4. To participate in a Chat, simply type your message in the Enter Text field at the bottom of the screen and press Return or Enter. Your message appears in the main area of the ‘Chat’ window, visible to all participants.

5. To leave the Chat, close the ‘Chat’ window by clicking the close box. The other participants will be told that you have left.

Special Menu



The buttons at the top of the ‘Chat’ window are shortcuts to the functions on the Special menu.

Invite

This function opens a list showing everyone currently logged in to FirstContact. Double-click on a name to invite a person into the Chat.

Who is in this chat?

This function produces a report showing everyone currently participating in the Chat. The report can be printed by clicking the Printer icon.

Beep Others

This function causes the computers of everyone currently participating in the Chat to beep.

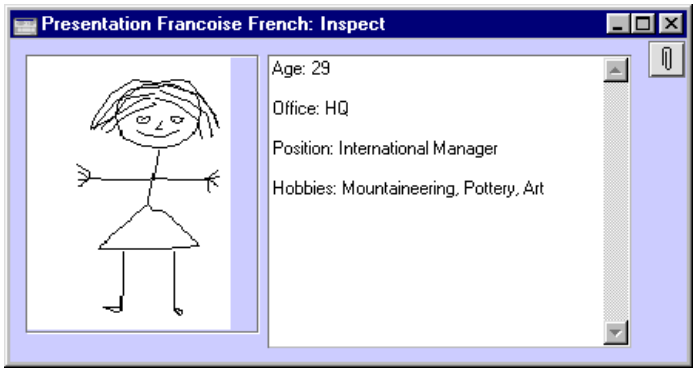
Presentations

Each FirstContact user with a Mailbox can enter a Presentation containing a brief profile about themselves and a picture. This profile will be visible to other users. Each Conference can also have a Presentation, which can contain details about the purpose of the Conference.

Presentations can be viewed and modified by the system administrator using the ‘Conferences’ setting in the Technics module.

Entering a Presentation

To enter your Presentation, bring the Master Control panel to the front and select ‘Presentation’ from the Special menu. The following window opens—



Type your profile in to the right-hand field and paste a picture in the left-hand field. Click the [OK] button in the Button Bar to save the Presentation and close the window.

You can return to your Presentation at any time using the same route to change it.

Reading Presentations

To read the Presentation of another user, first open a Mail with that user listed as the sender or one of the recipients, or create a new Mail and enter the user’s name in the list of recipients. Ensure the cursor is in the user’s name and select ‘Presentation’ from the Special menu. The user’s Presentation is opened. Once you have read it, close it by clicking the close box.

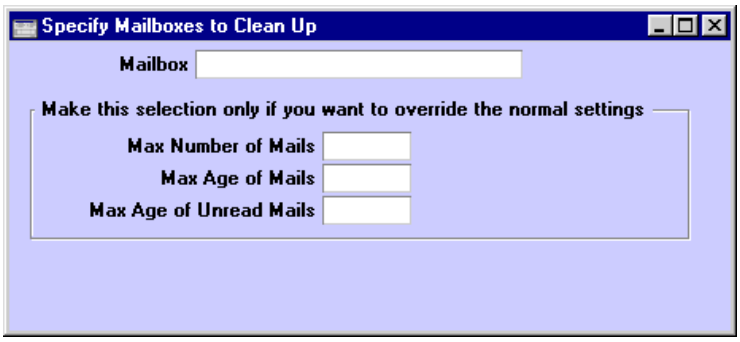
This method should also be used to create Presentations for Conferences.

Maintenance

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. Maintenance functions connected with FirstContact's Mail facilities are located in the Technics module. Use the Modules menu to ensure you are in the Technics module and then select 'Maintenance' from the File menu. When the 'Maintenance' list appears, double-click an item in the list. A specification window will then appear, where you can decide how the function is to operate. Click [OK] again to operate the function.

Clean Up Mail Registers

This function can be used to remove old Mails, to free up disk space.



Mailbox **Paste Special** Mailboxes and Conferences

If you would like to remove Mails from a particular Mailbox or Conference, enter its name here. Otherwise, all Mailboxes and Conferences will be affected.

Max Number of Mails

Specify here the maximum number of Mails that you would like Mailboxes and Conferences to contain. If any Mailboxes or Conferences contain more than this number of Mails, the oldest Mails will be removed until this number is reached. Mails whose Lifespan is Never Remove will not be removed, while those whose Lifespan is Remove Next Day will be removed first.

You should only enter a number here if you want to override the maximum number specified in the Mail Settings setting in the Technics module or that specified when creating individual Mailboxes and Conferences, or if you have not specified a number in either of those places.

Max Age of Mails Specify here the maximum age in days of Mails that you would like Mailboxes and Conferences to contain. All Mails that are older will be removed, unless their Lifetime has been set to Never Remove. The calculation is made from the date a Mail was last modified, not the date it was created. Mails that have not reached this age may be removed as well if the Maximum Number (above) has been exceeded.

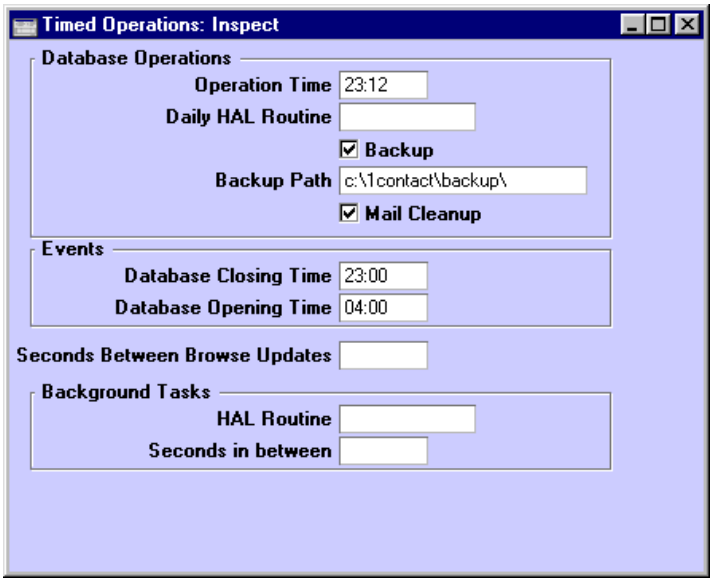
You should only enter a number here if you want to override the maximum number specified in the Mail Settings setting in the Technics module or that specified when creating individual Mailboxes and Conferences, or if you have not specified a number in either of those places.

The maximum age for read Mail applies to both Mailboxes and Conferences, while that for unread Mail applies to Mailboxes only.

Press the [OK] button to start the updating process. This may take a few minutes, depending on the number of Mailboxes and Conferences, and on the number of Mails to be deleted. When the process has finished, you will be returned to the ‘Maintenance’ list window. This can be closed by clicking the close box.

Removing Mail Automatically

You can choose to have this function run regularly and automatically. To do this, open the Timed Operations setting in the Technics module—



Specify a time in the Operation Time field (using the 24 hour clock) and check the Mail Cleanup box. The ‘Clean Up Mail Registers’ function will be run automatically at that time every day, providing the server is running. If you use this facility, you must make sure a maximum number of Mails and/or a maximum age has been specified in the Mail Settings setting, if not for the individual Mailboxes and Conferences. Otherwise, no Mails will be deleted. In the illustration, it has been determined that both backing up and removing old Mail will take place automatically every day.

Emptying the “Tmp” Folder

The External Gateway uses a folder named “Tmp” to store mail attachments downloaded from the POP3 server before they are transferred to the “Attach” folder and attachments that are to be uploaded to the SMTP server.

Once an attachment has been transferred to the “Attach” folder or uploaded to the SMTP server, it is not removed from the “Tmp” folder. If space is at a premium, therefore, you should periodically empty the “Tmp” folder manually.

Reports

Reports connected with FirstContact's Mail facilities are located in the System and Technics modules. Use the Modules menu to ensure you are in one of these modules as appropriate and then select 'Reports' from the File menu or click [Reports] in the Master Control panel. Then, highlight the appropriate item in the list. Using the Special menu, 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 the print destination has been chosen, click [OK]. A specification window will then appear, where you can decide what is to be included in the report. Click [OK] again to print the report.

Where specified below, it is often possible to report on a selection range, such as a range of Mails. To do this, enter the lowest and highest values of the range, separated by a colon. For example, to report on Mails 001 to 010, enter "001:010" in the Serial Number 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.

E-mail Aliases

This report in the Technics module lists the E-Mail Aliases for each user. It also lists users that don't have Mailboxes, and users that have Mailboxes but not E-Mail Aliases.

User

Paste Special Person register, System module

Range Reporting Alpha

Enter the initials of the user (i.e. record in the Person register) for whom you wish to check E-Mail Aliases. If you enter two sets of initials separated by a colon (:), the report will list E-Mail Aliases for all users whose initials fall between those two sets alphabetically. Leave the field blank to report on all users.

Conference	**Paste Special**	Mailboxes and Conferences
	Range Reporting	Alpha

Enter the name of the Mailbox or Conference for whom you wish to check E-Mail Aliases. If you enter two names (or two initial letters) separated by a colon (:), the report will list E-Mail Aliases for all

Mailboxes and Conferences in the range. Leave the field blank to report on all Mailboxes and Conferences.

Mail History

This report is the same as that obtained by opening a Mail and selecting 'History' from the Special menu. It shows who has created, read and modified a specified Mail, and when they did it.

Ser Nr Enter the Serial Number of the Mail whose History is to be printed. An entry must be made here or the report will be blank.

FirstContact Activities, To Do and Calendar

Chapter 7: Activities, To Do and Calendar

FirstContact is a simple and efficient tool for keeping track of contacts with Customers, organising mailshots and for planning activities of all kinds. The program 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 FirstContact, 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 To Do List. 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 tools in FirstContact, there is a great deal of flexibility, and different users will adapt it to their own requirements.

This chapter begins with an example and continues with a description of the Activity register, the heart of FirstContact'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 To Do List. These are described later in the chapter. The Customer Letter and Target Time registers are then described, and the chapter ends with descriptions of the various documents and reports concerned with Activities.

Examples

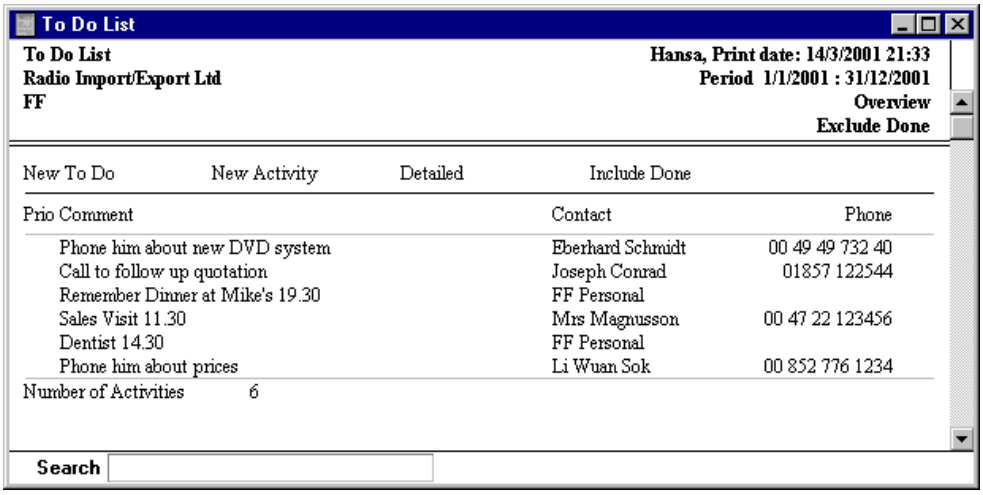
Contact Management

To explain the contact management tools in FirstContact 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.

In the morning, Françoise French will produce her 'To Do' list for the next few days. To do this, she will click the [To Do] button in the Master Control panel—

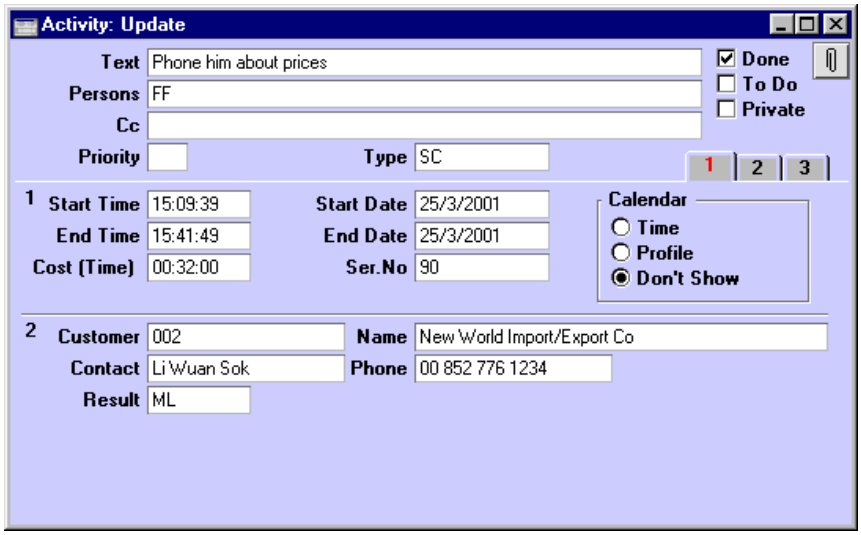
The 'To Do' list is effectively a list of Activities that she has entered to FirstContact and which she has determined are to be carried out sometime

during the report period. It does not list Activities that have been marked as Done. It is a simple list sorted by Start Date and Time as follows—

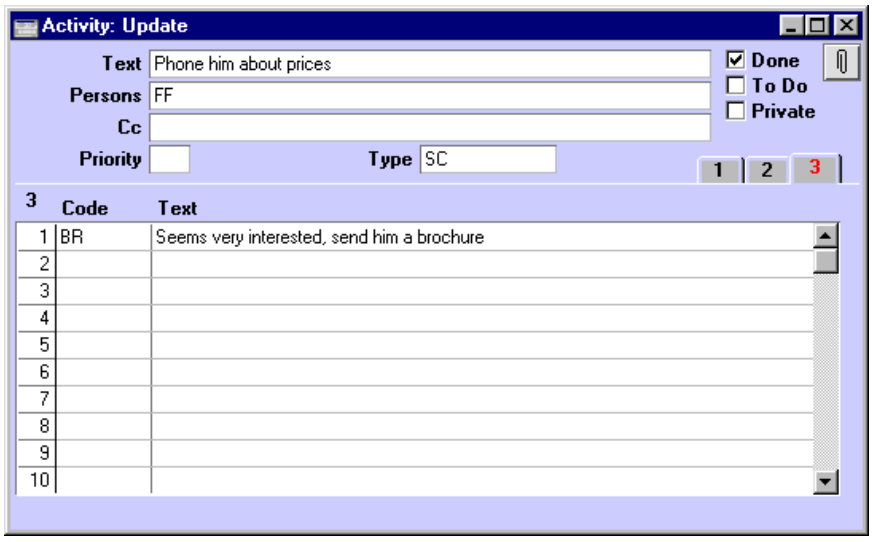


This list will remain on her screen throughout the day in its own window.

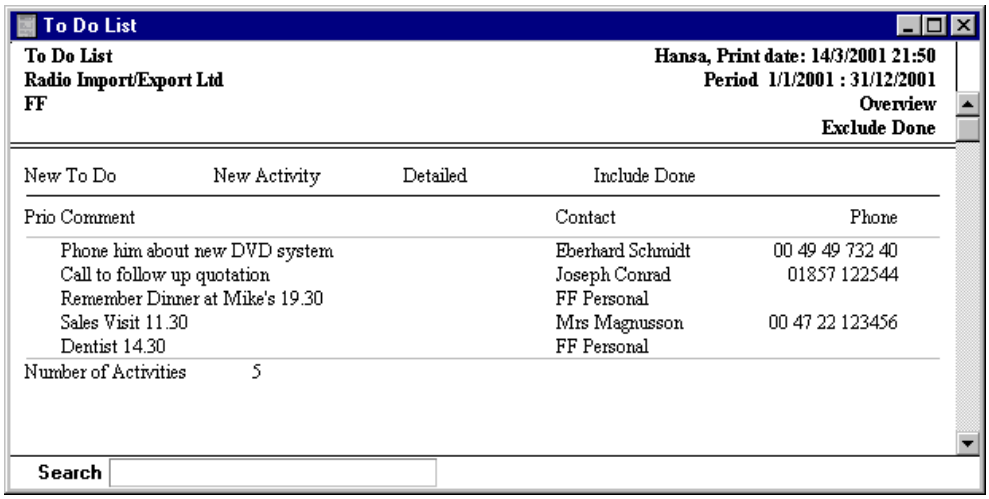
When printed to screen, the To Do List has FirstContact's Drill-down feature. When Françoise carries out one of these planned Activities, she will double-click the Comment in the report to open the appropriate record in the Activity register. She can then remind herself of the details of the Activity before carrying it out. When the task has been completed, she can record the Result and mark the Activity as Done—



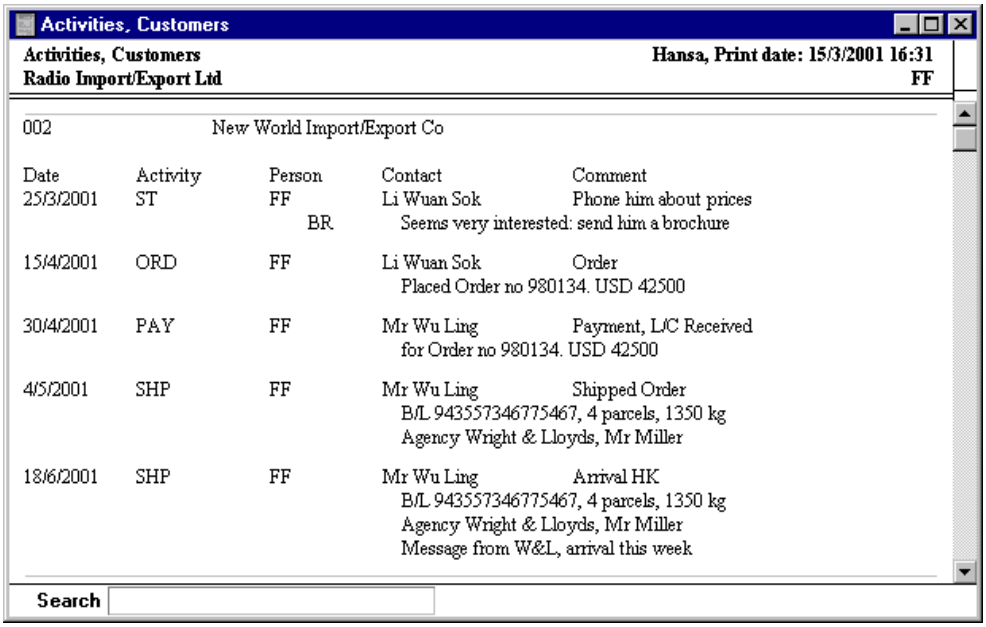
For example, in the case of her scheduled telephone call to Li Wuan Sok of the New World Import/Export Co, the call was made successfully and interest was expressed in the products she was selling. This interest is recorded in the Activity record. If necessary, more details can be entered to the grid on card 3—



On saving and closing the Activity, the To Do list is brought to the front again and recalculated. The last Activity has been removed, as Activities that have been marked as Done are not listed—



At other times during the day, Françoise will be contacted by several of her Customers. By entering an Activity for each contact or event, she will quickly build up a contact history for each Customer. So, for example, if 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.


Activities, Customers

Activities, Customers **Hansa, Print date: 15/3/2001 16:31**
Radio Import/Export Ltd **FF**

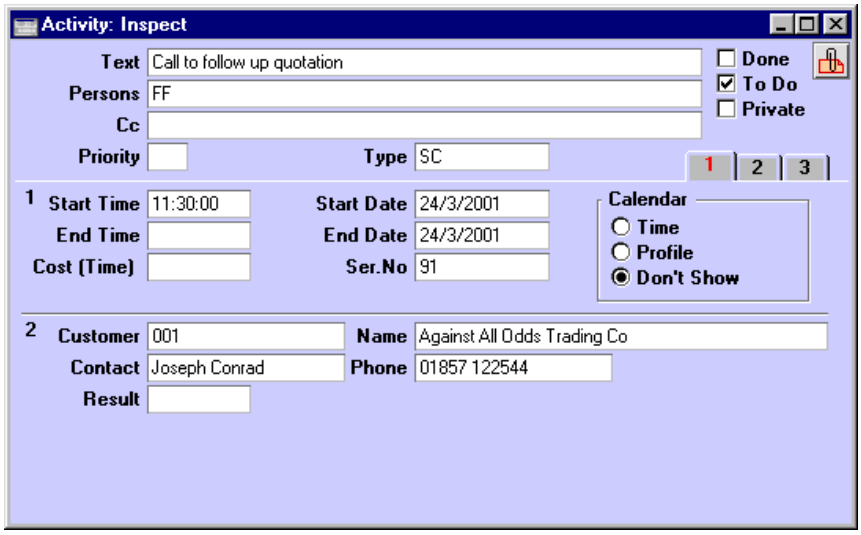
002 New World Import/Export Co

Date	Activity	Person	Contact	Comment
25/3/2001	ST	FF	Li Wuan Sok	Phone him about prices
		BR	Seems very interested: send him a brochure	
15/4/2001	ORD	FF	Li Wuan Sok	Order
			Placed Order no 980134. USD 42500	
30/4/2001	PAY	FF	Mr Wu Ling	Payment, L/C Received
			for Order no 980134. USD 42500	
4/5/2001	SHP	FF	Mr Wu Ling	Shipped Order
			B/L 943557346775467, 4 parcels, 1350 kg	
			Agency Wright & Lloyds, Mr Miller	
18/6/2001	SHP	FF	Mr Wu Ling	Arrival HK
			B/L 943557346775467, 4 parcels, 1350 kg	
			Agency Wright & Lloyds, Mr Miller	
			Message from W&L, arrival this week	

Search

This is an 'Activities, Customers' report for Customer 002, for the time period Mar 01 - Jun 01. It is the detailed variant of the report, showing all comments made for each Activity. It shows the Activities carried out and entered by different persons over the time period, and it is an excellent tool 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 FirstContact reports, it is possible to use the Search facility 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.

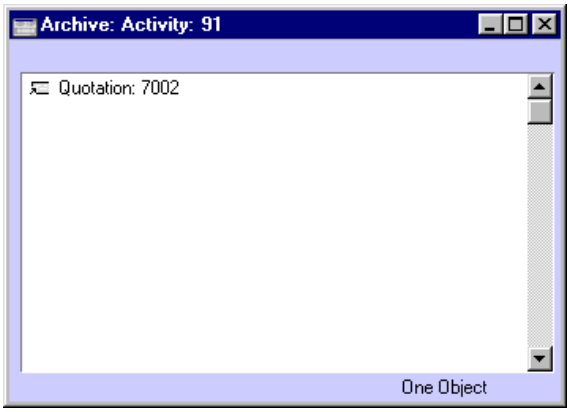
On returning to her To Do list, Françoise decides to call Joseph Conrad at the Against All Odds Trading Co. She double-clicks in the report to open the Activity to remind herself of the details.



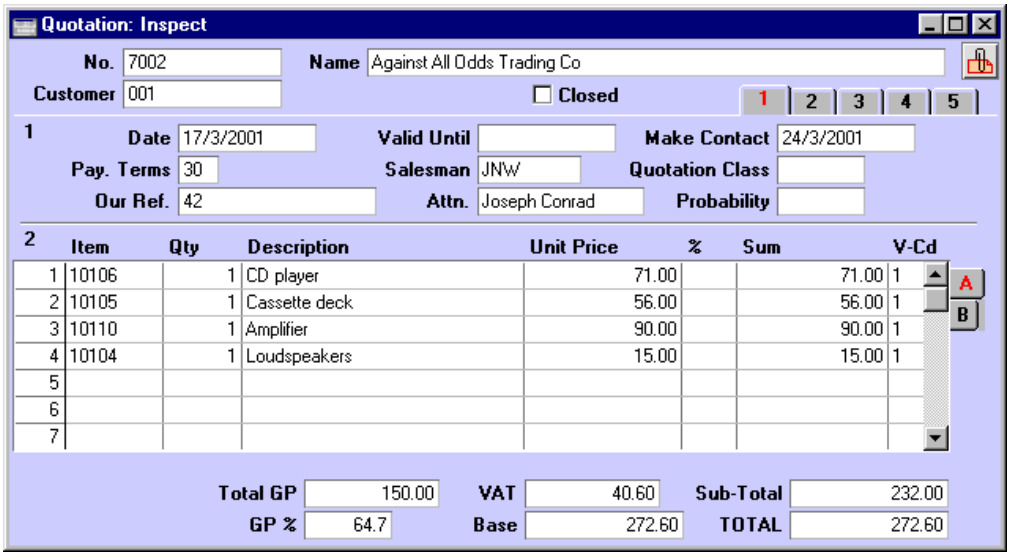
The Text field shows her that she is to make the call to follow up a Quotation that has already been sent, to try to convert it into an Order. In fact, the Activity was created when the Quotation was sent out, using the 'Create Activity' function on the Special menu of the Quotation screen. This function 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—

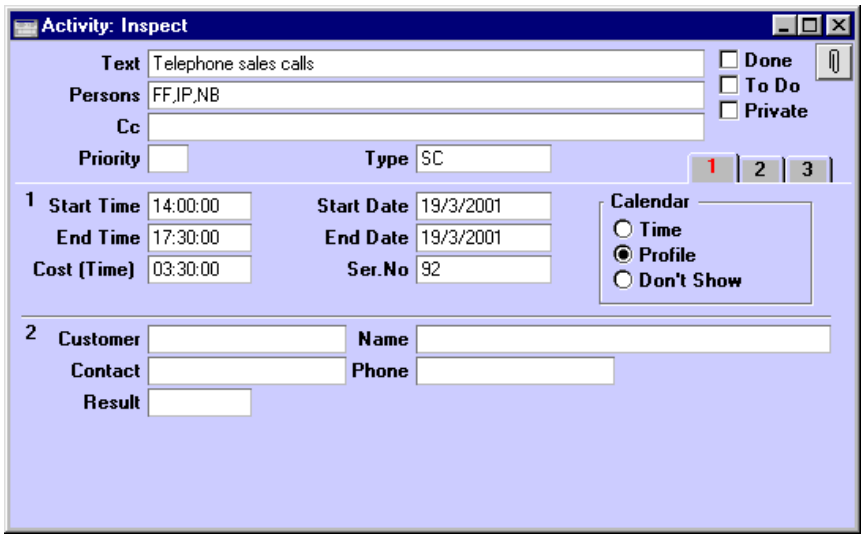


Françoise is able to convert the Quotation into an Order. From her To Do list, therefore, Françoise has been able to find quickly and easily the Quotation

she wanted. She could now close Quotation screen, mark the Activity as Done and finally return to and Recalculate her To Do list.

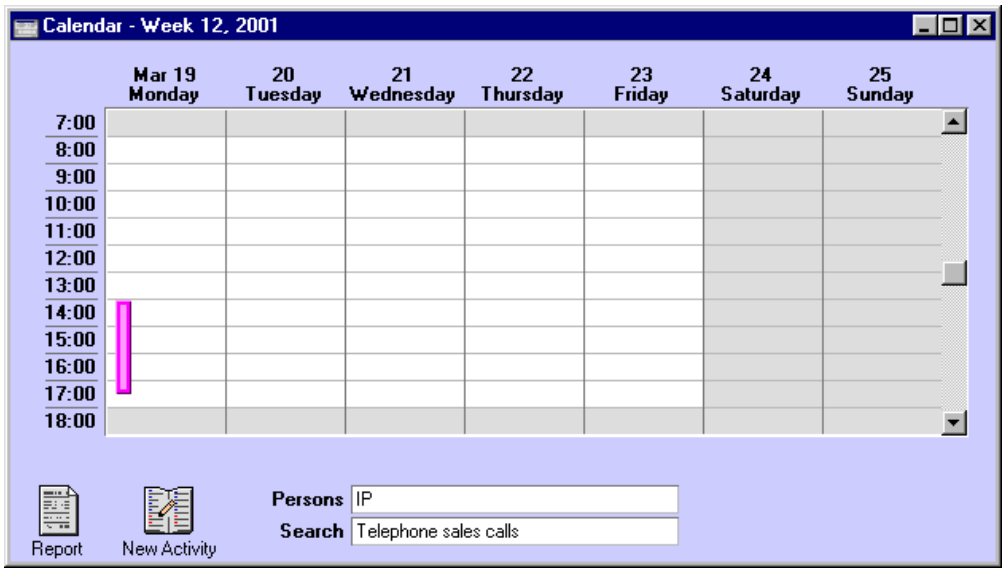
Time Management

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 enters an Activity in the names of all three department members booking their time—



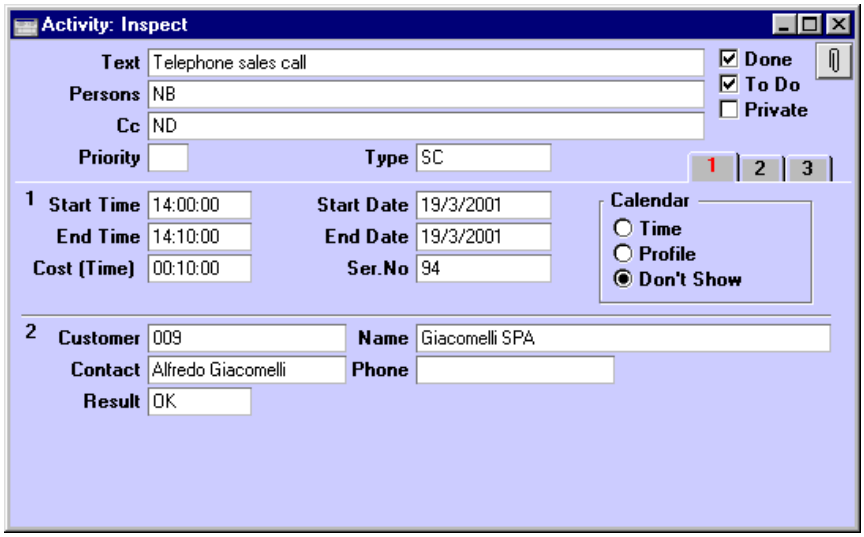
The initials of the three members of the department are entered to the Persons field, separated by commas. Of the Calendar options, Profile is chosen to indicate that this planned time.

When the Activity is saved, 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—



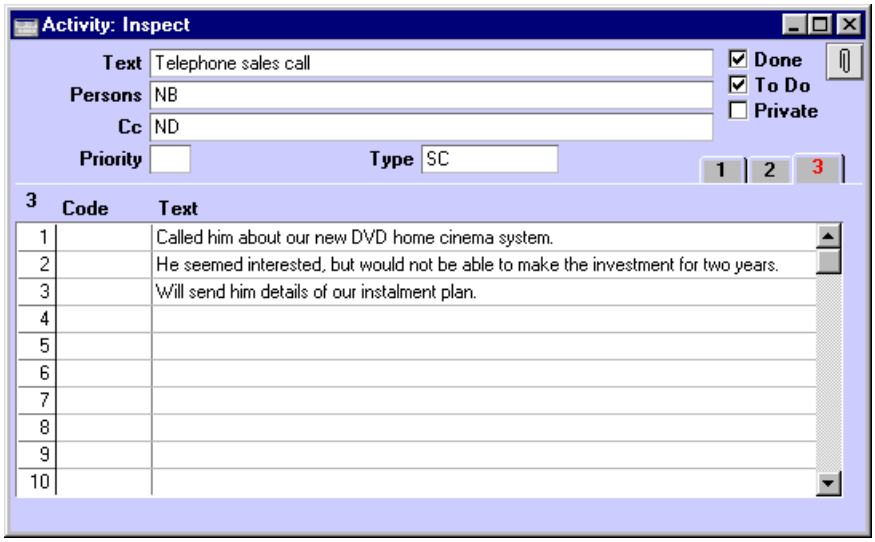
The Activity appears in their Calendar as a hollow coloured bar, because Françoise selected the Profile option. This bar signifies to the other two members of the department that their time has been booked. If either of them clicks the bar once, the Text of the Activity appears in the Search field at 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.

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—



The Calendar is not really suitable for the displaying of many small Activities representing individual telephone calls, so the To Do and Don't Show options have been selected. These Activities are not entered for time management purposes but to contribute to the contact histories of the Customers affected. So, selecting To Do means the Activity will not appear in the Calendar, while selecting Don't Show means it will not be included in the Employee Planned Time report. Don't Show can be selected automatically if this is specified in the Activity Class to which the Activity Type belongs.

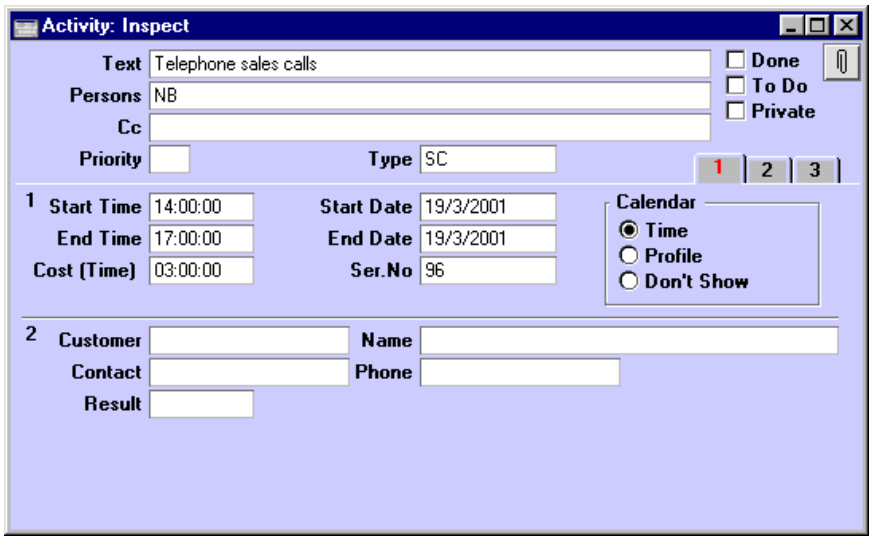
Details of each telephone call are recorded in the grid on card 3 of each Activity—



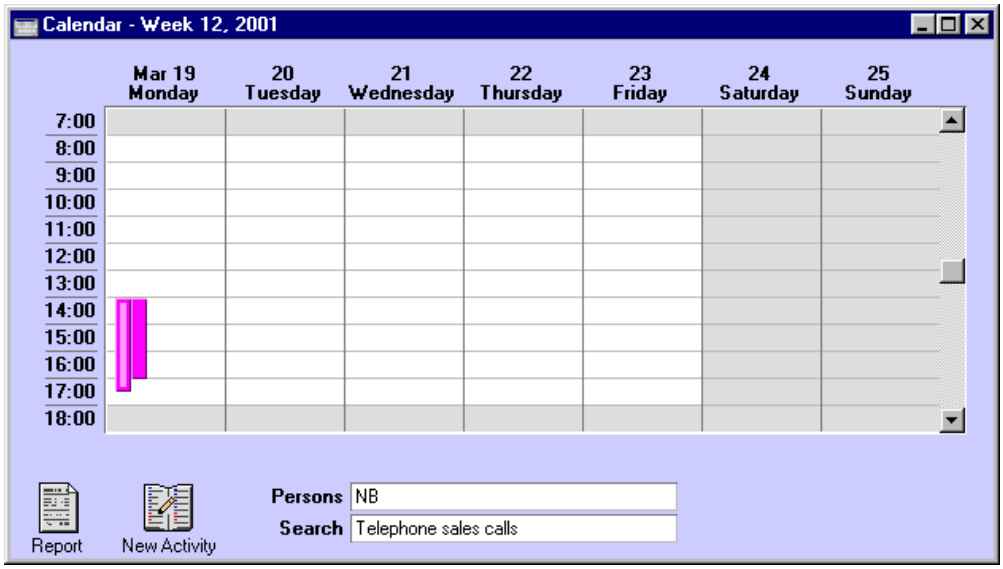
In this example, the call ended with a request to send some information to the Customer. After saving the Activity and while it is still on screen, Neil can click the [New] or [Copy] button to create a new Activity containing the instruction to send out the information. This can be in his own name, to 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 To Do List or Calendar (depending on whether Neil checks the To Do box).

The creation of the follow-up Activity can be automatic. This is controlled using the Activity Consequences setting. 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—

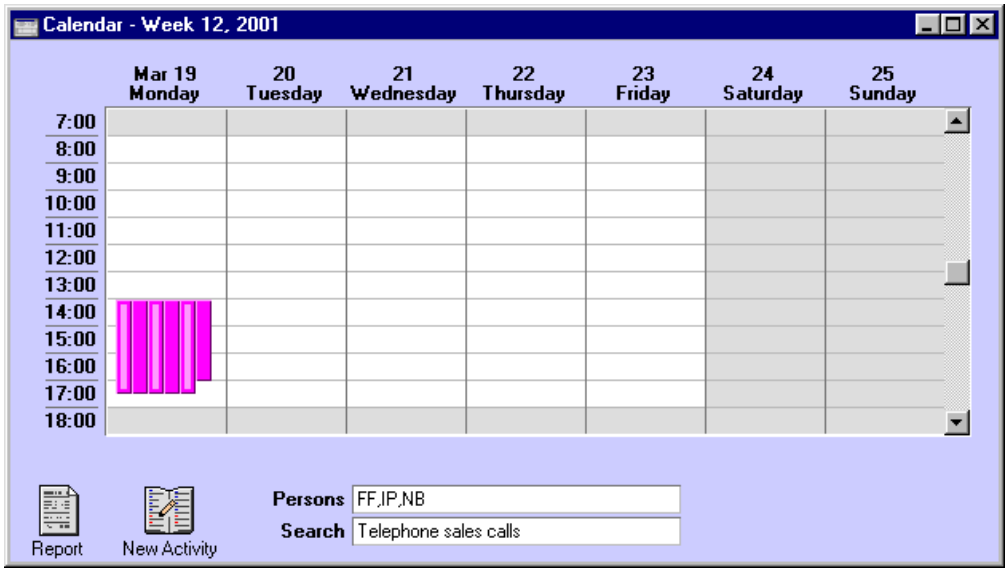


She selects the Time option, because the Activity represents the actual time spent making the calls. She does not check the To Do box because she wants the Activity to appear in the Calendar. It will appear in Neil's Calendar as a solid coloured bar to the right of the hollow bar entered earlier to book 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).

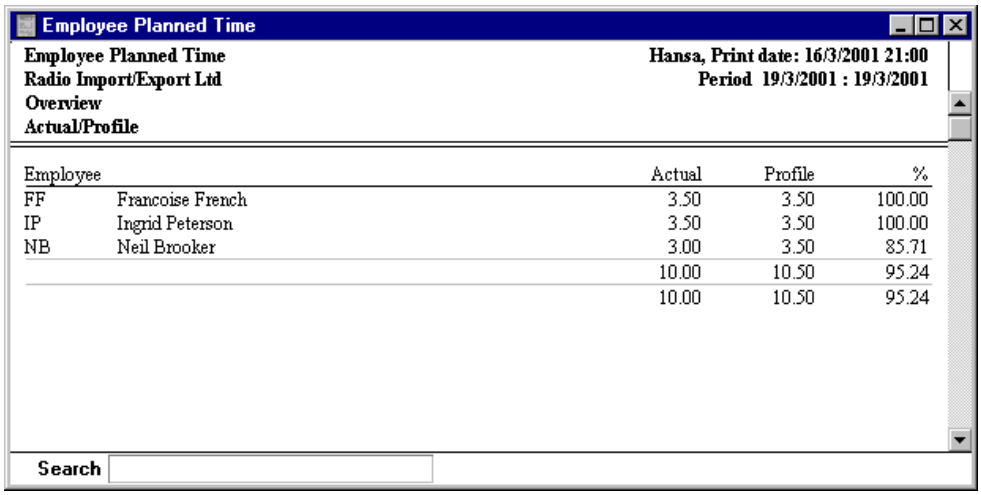
The time spent by all three employees can be shown in the Calendar by entering the three sets of initials in the Persons field, separated by commas—



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

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

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



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

In calculating the figures in these columns, all Activities are taken into account except those whose Don't Show option has been selected. It is recommended that the Don't Show option be used to keep Activities used for contact history purposes separate from those used for time management purposes, otherwise you risk including the same time twice in the report. So the Activities representing the individual telephone calls were all marked as Don't Show.

Note on Terminology

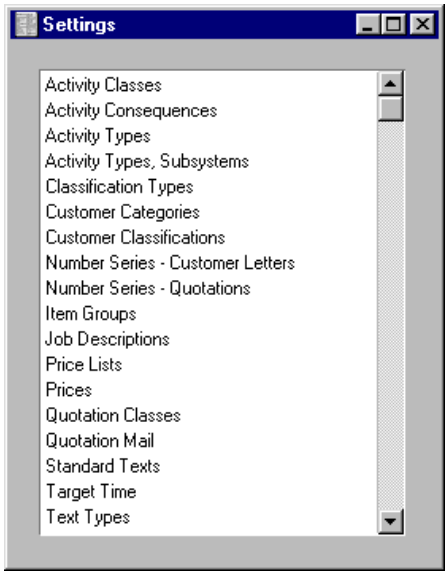
Throughout this chapter (as elsewhere in this manual), the word "Customer" is used to refer to a record in the Customer register. That record does not necessarily represent a firm that has purchased goods or services from your business.

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 card 1 of the Customer record.

The phrase “Time Activity” has sometimes been used to mean an Activity in which the Time option has been chosen, i.e. one representing actual time spent in carrying out a task. Similarly, a “Profile Activity” is one whose Profile option has been chosen, i.e. one representing the booking of planned (future) time.

Settings

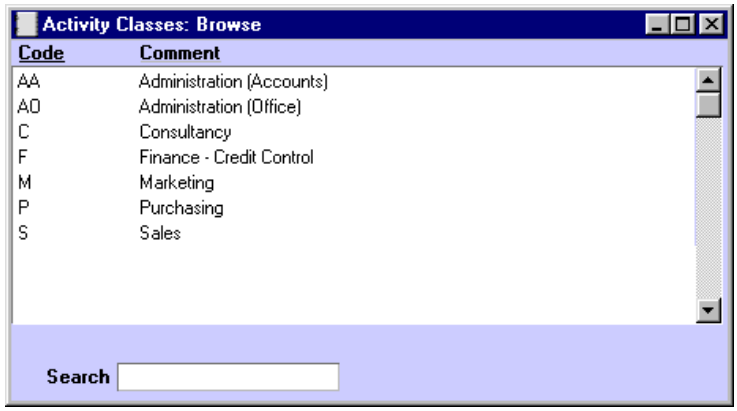
Settings concerned with FirstContact's contact and time management tools are located in the Contact module. To access them, use the Modules menu to enter the Contact module and then select 'Settings' from the File menu or click [Settings] in the Master Control panel. The 'Settings' list opens, listing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



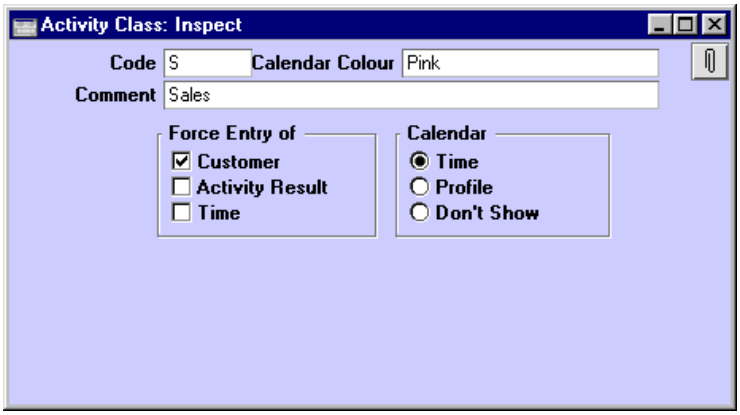
To edit a setting, double-click the relevant item in the list.

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 Contact 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 [OK] 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 Customer, Result and/or Cost (Time) to be entered to all Activities with Activity Types belonging to this Activity Class.
Calendar	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 section below describing card 1 of the Activity screen for details of each option.

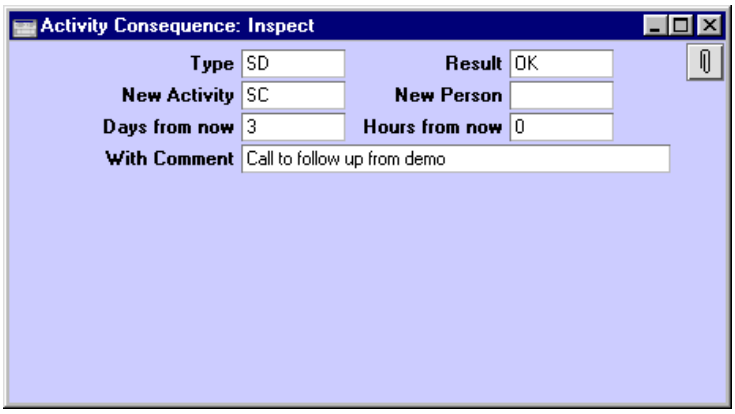
Activity Consequences

This setting is used 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.

On double-clicking 'Activity Consequences' in the 'Settings' list in the Contact 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 [OK] to save the new record.



Type, Result	**Paste Special**	Activity Types setting, Contact module

New Activities will be created when existing Activities with a particular combination of Activity Types and Results are saved. Use these two fields to specify that combination. Only a single Activity Consequence record can be saved for each Activity Type/Result combination.

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

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

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, the Person of the original Activity is changed, that record should be saved before the Result is entered. 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.

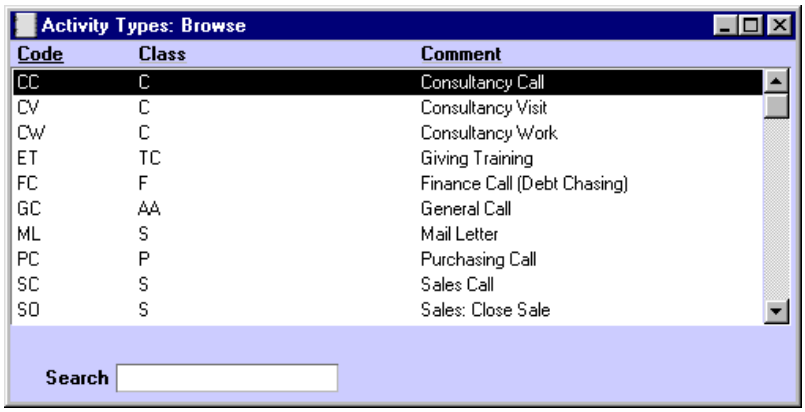
In the example illustration above, whenever an Activity of Type "SD" (for "Sales Demonstration") and Result of "OK" is marked as Done and saved, a new Activity is automatically created for three days' time with a Type of "ST" (for "Sales Telephone Call"). The new Activity is marked as To Do.

Activity Types

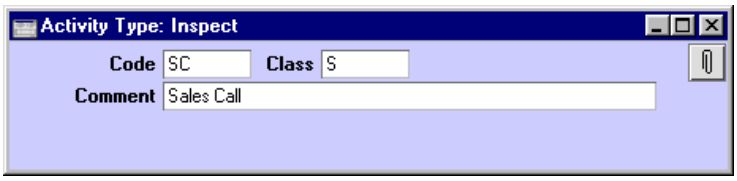
Activity Types are used to classify Activities. Each Activity Type should represent a specific job or task (e.g. sales call, sales appointment or internal meeting). All Activities recording the same task should be given the same Activity Type. The Activity Type can be used as a search criterion in many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

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).



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 [OK] 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.

Class **Paste Special** Activity Classes setting

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).

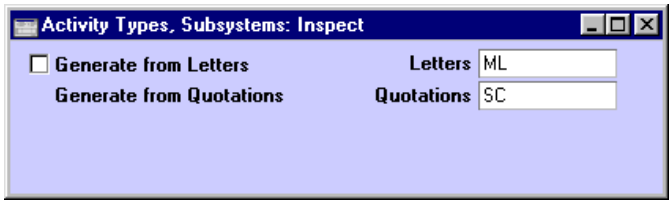
All Activities with Activity Types belonging to the same Activity Class will appear in the same colour in the Calendar. You can also force a Project, Customer, Result and/or Cost (Time) to be entered for Activities of the same Class.

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.



Activities can be created using the 'Create Activity' function on the Special menus of the Customer Letter and Quotation screens. The Activities will be given the Activity Type specified on the right.

In the case of Customer Letters, Activities can also be created when records are approved and saved. Check the box on the left if you would like this to

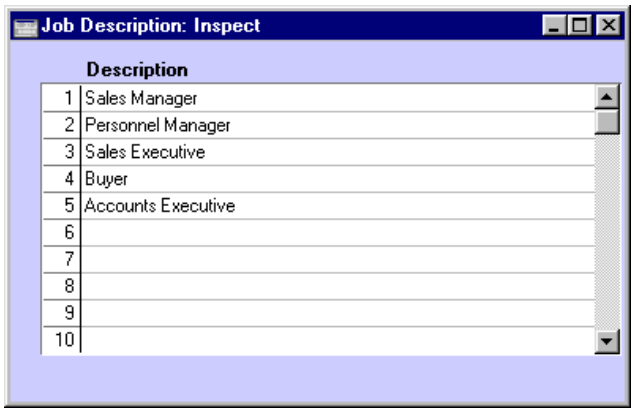
happen: this has no power over the ‘Create Activity’ function. Again, the Activities will be given the Activity Type specified on the right.

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—



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

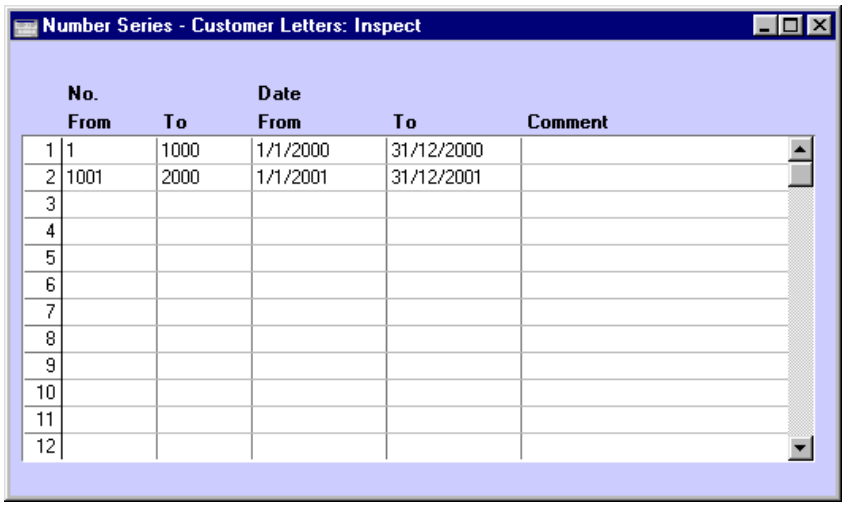
Number Series - Customer Letters

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—

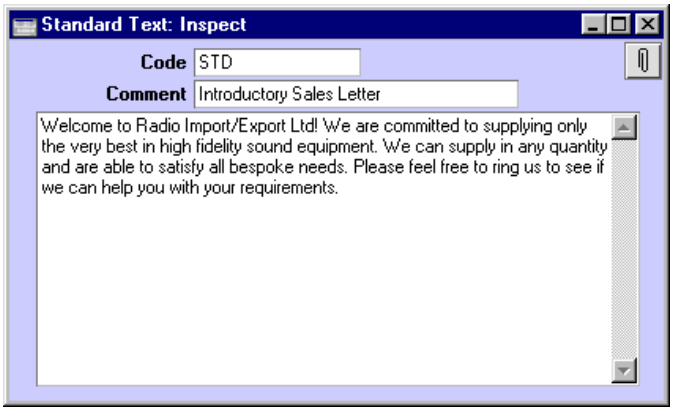


Enter each new Number Series on the first blank line and, when finished, click the [OK] button in the Button Bar to save the changes. To close the window without saving changes, click the close box.

Standard Texts

This setting 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 Contact module and click the [Settings] button in the Master Control panel or select ‘Settings’ from the File menu. Double-click ‘Standard texts’ in the resulting list. 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.



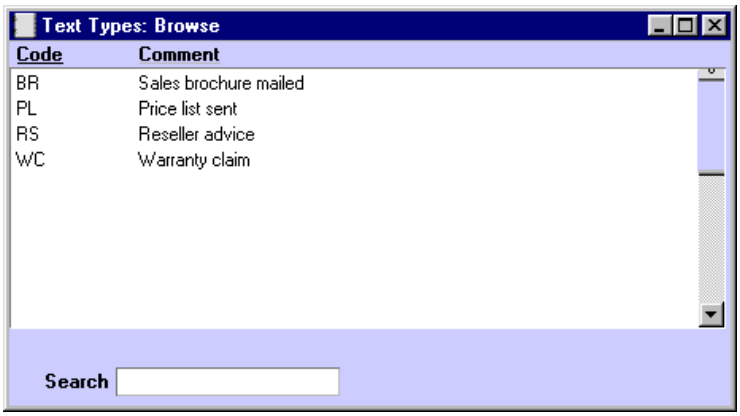
To save a Standard Text record, click the close box and elect to save changes.

Target Time

This setting is described later in this chapter, in the section entitled ‘The Target Time Setting’.

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 [OK] to save the new record.

Activities

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 three 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, double-click the Start Time or Activity Text of any Activity.

3. Having printed the To Do List report to screen, double-click the Activity Text of any Activity.

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 To Do List report are all described later in this chapter.

Entering an Activity

Activities can be entered in many ways—

1. From any Calendar view, click the [New Activity] button in the bottom left-hand corner or the [New] button in the Button Bar or use the Ctrl-N (Windows) or ⌘-N (Macintosh) keyboard shortcut.

2. When viewing an existing Activity, click the [Copy] button in the Button Bar or use the Ctrl-K (Windows) 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, double-click the text "New Activity" at the top of the report.

4. Having printed the To Do List report to screen, double-click the text “New Activity” or “New To Do” at the top of the report. In the latter case, the To Do and Private boxes will be switched on in the new Activity.

5. When working with Customer Letters or Quotations, select ‘Create Activity’ from the Special menu of the record window to create an Activity relevant to the record you are working with. 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 [OK] button in the Button Bar. Alternatively, if you no longer require the Activity, select ‘Delete’ from the Record menu.

   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.

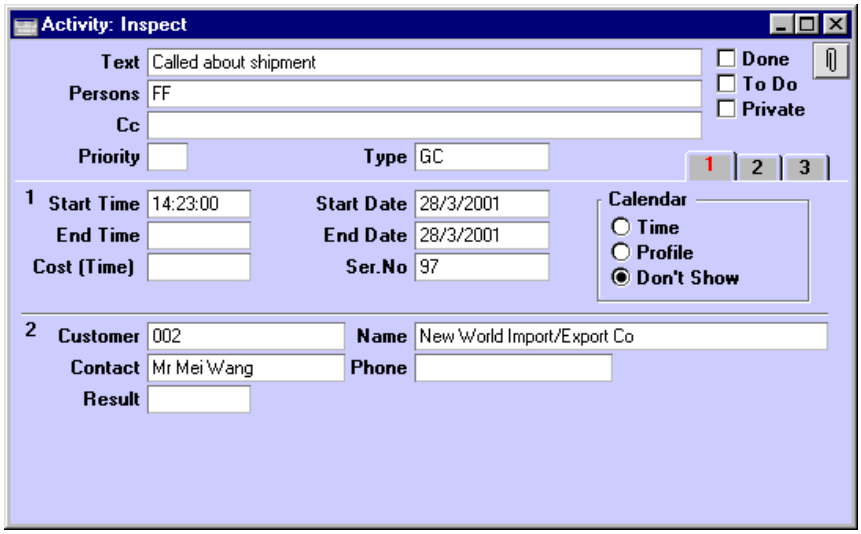
6. When working with Customer Letters, Activities can be created when records are approved and saved. This is controlled using the Activity Types, Subsystems setting. Such Activities are created and saved, but are not automatically opened for checking or modification. Again, the Activity and the originating record will remain connected to each other through the Attachments facility.

7. 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.

In each case, the ‘Activity: New’ window is opened, empty if you clicked [New] or with a copy of the copied Activity (point 2 only). The Start Date and Start Time of the new record will show the current date and time (even in the case of the copy), and the initials of the current user (i.e. the Person signed in to FirstContact for this work session) will be entered as a default in the Persons field.

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 three cards. At the top of each is the header. This contains the Text, Person, Priority and Type, and an indication of whether the Activity has been approved (completed). There are three numbered 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 daily Calendar view and in the Personal Calendar and To Do List reports.

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 and Personal Calendar and To Do List 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 FirstContact to add the next set of initials to those already entered. Otherwise, the previous initials will be overwritten.

Cc **Paste Special** Person register

Enter the initials of anyone else that needs to know about the Activity (e.g. a supervisor or the person responsible for the Customer). Again, the initials of more than one Person can be entered, separated by commas. The Activity will appear in all their Calendar views and Personal Calendar and To Do List reports.

Type **Paste Special** Activity Types setting, Contact module

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).

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 Customer, Result and/or a Cost (Time) (see below). It will also determine which of the Calendar options (card 1) will be selected by default.

Priority You can grade the importance of each Activity using the Priority field. The Priority will be shown in the To Do List report.

Done 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 card 3. 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 To Do List report.

Once an Activity has been marked as Done and saved, the To Do and Private boxes, the Start and End Dates and Times and the Calendar options 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, To Do List and all reports. Then click the [Copy] button in the Button Bar to create a new Activity without the mistake.

Activities whose To Do box has been checked will not appear in the Calendar, even if the Done box is also checked. Instead, if both the To Do and Done boxes are checked, the Activity will continue to be shown in the To Do List report if you select the option to Include Done. Therefore, remember to remove the check from the To Do box before marking an Activity as Done if you would like it to be transferred from the To Do List to the Calendar.

To Do

Check this box if you would like this Activity it to be shown in your To Do List report. Do not check it if you would like it to be shown in the Calendar.

As an example of how this check box will be used, imagine you decide to spend an afternoon making sales telephone calls. You will probably enter a single Activity covering the whole afternoon in which the To Do box is not checked. This will appear in your Calendar in the appropriate colour, showing how the afternoon was spent. You may have scheduled some of the telephone calls in advance, by entering separate Activities for each call to be made in which the To Do box is checked. You will probably start the afternoon's work by producing a To Do List showing these calls 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 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 To Do List the next time it is produced. Even once the calls have been completed, you will probably leave the To Do box checked because it is not really practical to show many small Activities in

the Calendar. Their remaining use will be to form part of the contact history of the Customer in question.

The Employee Planned Time report can be used to analyse the number of hours worked by each employee. All Activities are included in the time calculations in this report except those marked as Don't Show (see below). In the example in the previous paragraph, therefore, it is recommended that either the Activities representing the individual telephone calls or the single Activity representing the afternoon's work as a whole be marked as Don't Show. If the two sets of Activities are not separated in this way, you risk counting the afternoon's time twice in the report. Since the Activities representing the individual telephone calls will not appear in the Calendar because their To Do boxes are checked, it is suggested that these be marked as Don't Show as well. The Activity representing the afternoon's work as a whole might have its Time option chosen, since it represents work that has been carried out (the Profile option is usually used for planned time). The selection of Don't Show for the telephone call Activities can be accomplished automatically by attaching the appropriate Activity Type to an Activity Class which itself has been marked as Don't Show.

Once an Activity has been marked as Done and saved, the To Do box cannot be changed. If the To Do box remains checked, the Activity will still be shown in the To Do List report if you select the Include Done option.

Private

An Activity marked as Private will appear in your Personal Calendar and Activities, Customers reports and in any Calendar view when viewed by yourself, but not when viewed by any other user.

The Private check box only applies to the Personal Calendar and Activities, Customers reports and in any Calendar view as these can be produced on your behalf by other users. It does not apply to the To Do List, as this can only be produced by yourself. Therefore, the Private check box is only useful in Activities whose To Do box is not checked.

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

Card 1

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) The overall time required to complete the Activity, calculated by FirstContact 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.

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.

Once an Activity has been marked as Done and saved, the Cost (Time) cannot be changed.

The Cost (Time) is sometimes referred to as the Elapsed Time in this manual.

Ser. No The unique identifying code for each Activity is generated by FirstContact: this cannot be changed.

Calendar These options are used to control how the Activity is shown in the Calendar. They cannot be changed once the Activity has been marked as Done and saved.

Activities whose To Do box has been checked will not appear in the Calendar, irrespective of the option selected here and even if the Done box is also checked.

Time When an Activity has been completed, it should be marked as Done (but not as To Do), an End Time/Date entered and this Time option should be selected. This will ensure that it appears in the Personal Calendar report together with the Cost (Time) and in the Calendar with a solid colour bar.

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. Do not check the To Do box for Profile Activities.

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, providing the To Do box is not checked. Activities marked as Don’t Show will not be included in the time calculations in the Employee Planned Time report.

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

Card 2

Customer — **Paste Special** — Customer register

Enter the Customer Number or use the 'Paste Special' function. When you press Return, the Customer's name will be entered into the field to the right.

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.

Name

The Customer Name is entered by FirstContact after you have entered the Customer Number.

Contact — **Paste Special** — Contact Person register, Contact 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 primary Contact has been entered to the Attn. field on card 1 of the Customer record, this will be brought in as a default.

Phone

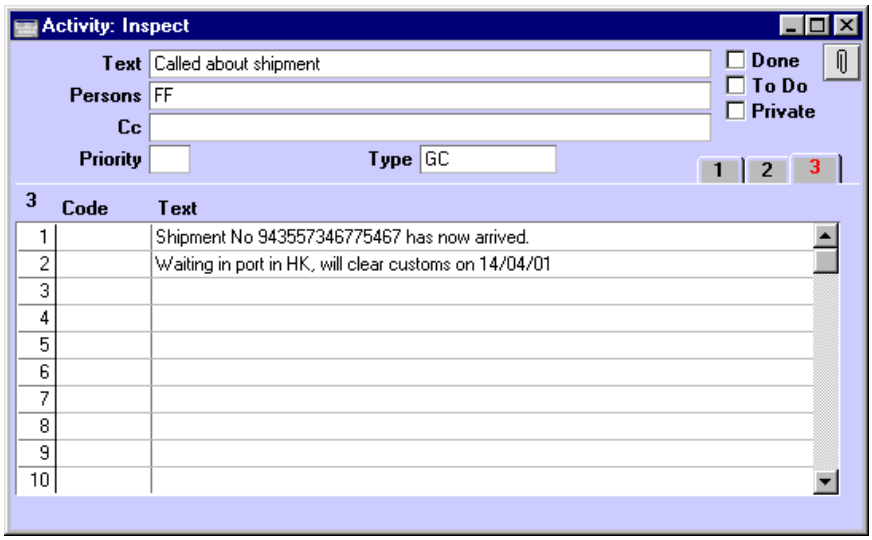
The Customer's Telephone Number is entered by FirstContact after you have entered the Customer Number.

Result — **Paste Special** — Activity Types setting, Contact 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. When the Activity is marked as Done and saved, FirstContact 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.

Card 3



Code — **Paste Special** — Text Types setting, Contact module

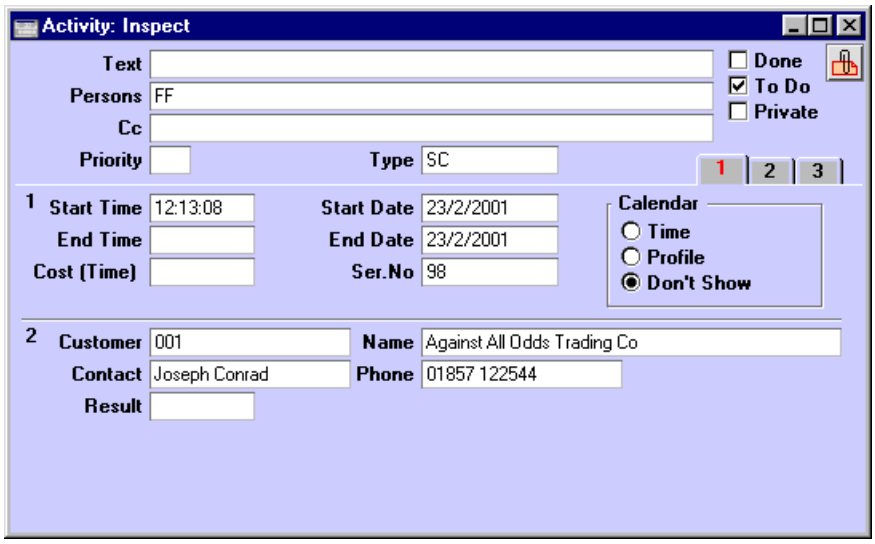
The grid area is useful for making notes about the Activity. The Text Types setting can be used to bring in certain generic comments: alternatively, leave the Code field blank and simply type some *ad hoc* text in the Text field. There is space for several rows of notes.

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

Creating Activities from other Registers

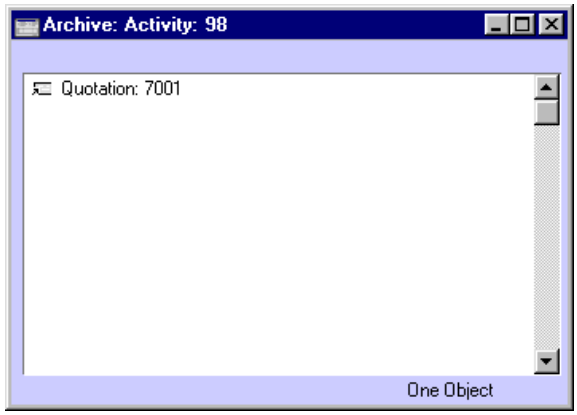
Many Activities will be created remotely from Customer Letters and Quotations using the 'Create Activity' Special menu function. The Activity and the originating record will remain connected to each other through the Attachments facility. This allows you to open the originating record quickly and easily 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—

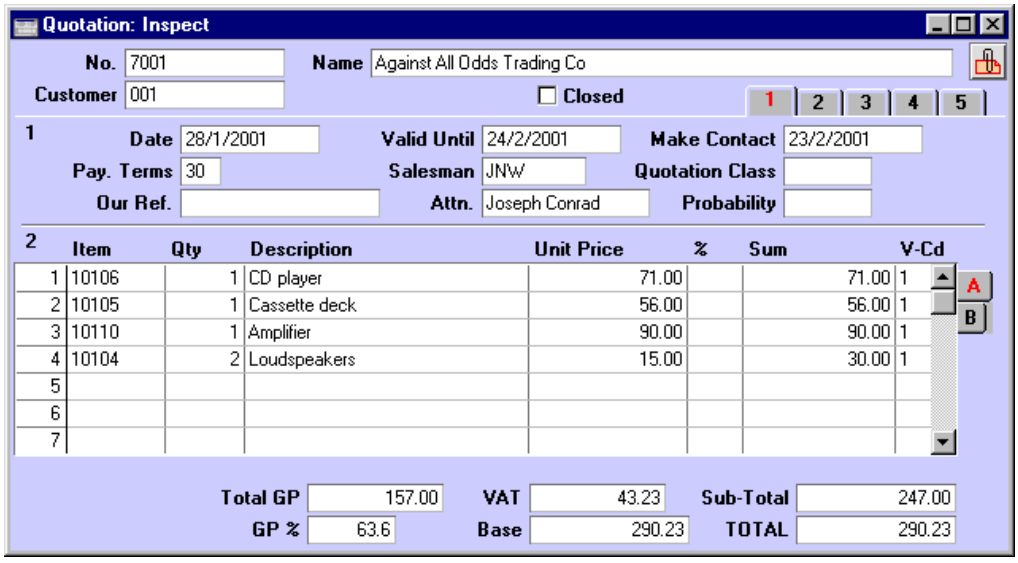


The [Attachments] button with the paper clip image shows that the Activity has at least one attachment—

Click this button (or select ‘Attachments’ from the Record menu) to open a list of the objects attached to the Activity—



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



You can also open the Activity from the Quotation in a similar manner.

Completing an Activity

As you work your way through your To Do list, you will want to mark off each Activity as completed. As well as removing them from your To Do list, this will have the effect of building up an accurate contact history for the Customers concerned.

To do this, follow these steps—

1. Open your To Do List report by clicking the [To Do] button in the Master Control panel. The report will be printed to screen.

2. Double-click the Activity Text of the Activity that you are about to undertake. The Activity is opened, allowing you to remind yourself of the details.

3. When you have completed the task, click the Done box. Remove the check from the To Do box if you want the Activity to be shown in the Calendar. If necessary, enter a Result and press Tab or Return. The End Date and End Time will be filled in automatically. If necessary, make any notes about the carrying out of the task in the grid area at the bottom of the screen.

4. Click the [OK] button in the Button Bar to save the changes. If you need to schedule a follow-up Activity, click the [New] button to enter a new record. Depending on how you have set up your Activity Consequences, a follow-up Activity may be created automatically. Finally, close the Activity using the close box. You will be returned to the To Do List report, from where you can repeat the cycle for the remaining Activities scheduled for the day.

Once an Activity has been marked as Done and saved, the To Do and Private boxes, the Start and End Dates and Times and the Calendar options 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, To Do List and all reports. Then click the [Copy] button in the Button Bar to create a new Activity without the mistake.

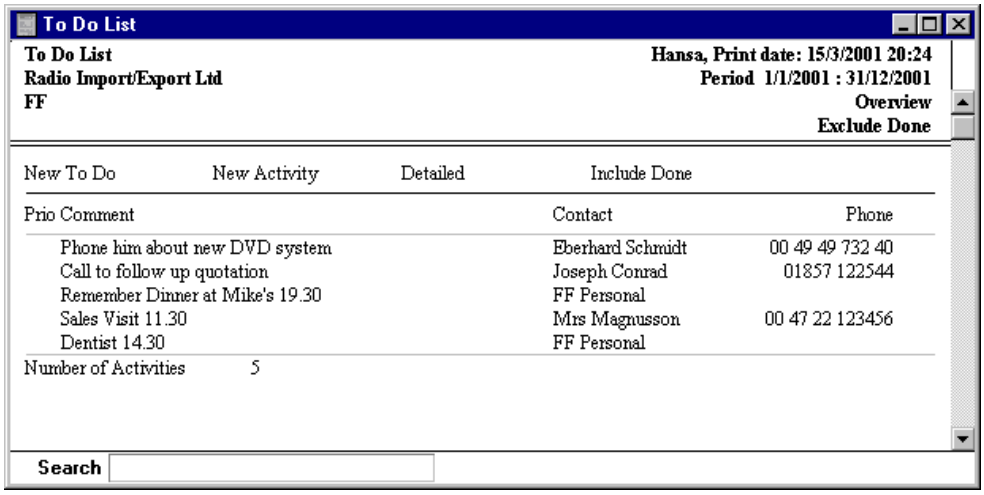
The To Do List

The To Do List 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.

When printed to screen, the To Do List has FirstContact's Drill-down feature. Double-click on the Activity Text of any Activity in the report to open that Activity. 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, thus effectively removing it from the To Do List. 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 To Do List.

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

The To Do List for the current user (i.e. the Person signed in to FirstContact for this work session) is immediately printed to screen, showing To Do Activities in Start Date and Time order. To Do Activities are Activities whose To Do box is checked and whose Done box is not checked. The report period is the first period in the Reporting Periods setting in the System module.

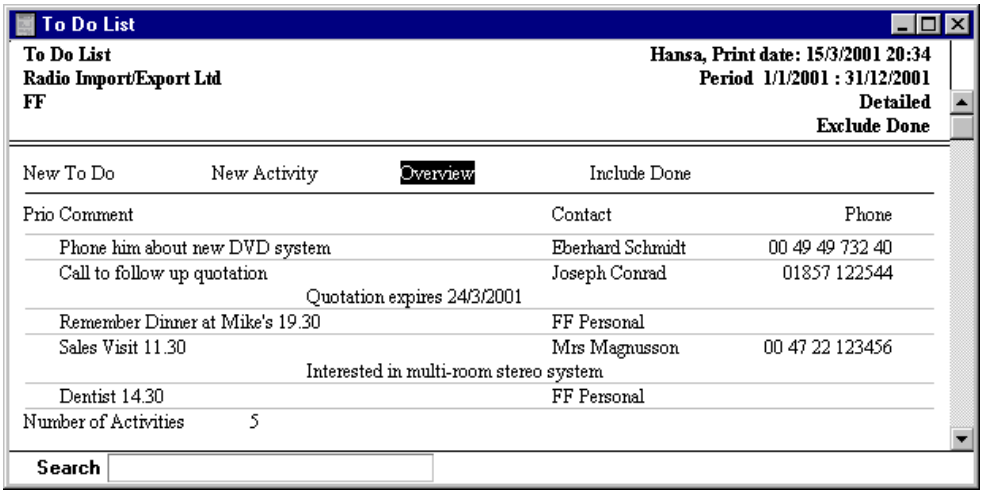


This screen version of the report contains a number of text buttons, as follows—

New To Do, New Activity

Double-click either of these (just underneath the report header) to create a new Activity. In the case of "New To Do", the To Do and Private boxes will be on by default. On saving and closing the new Activity and returning to the report, select 'Recalculate' from the Special menu. The new Activity will then be shown in the report, providing its To Do box remains checked.

Detailed Double-click "Detailed" to show for each Activity any text that has been entered to the grid on card 3.



Include Done Double-clicking here will cause Done Activities to be shown in the report (in this context, Done Activities are those whose To Do and Done boxes are both checked). These are shown in a second section of the report, and the text "OK" appears in the right-hand column beside each one.

Activity Text Double-click the Text of any Activity to open that Activity record. If the To Do List report is showing To Do Activities only and you mark an Activity as Done, on returning to the report, select 'Recalculate' from the Special menu to remove it from the report.

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

The Calendar

Opening the Calendar

The Calendar shows Done Activities and is useful for analysing employee time statistics. To open the Calendar, click the [Calendar] button in the Master Control panel—

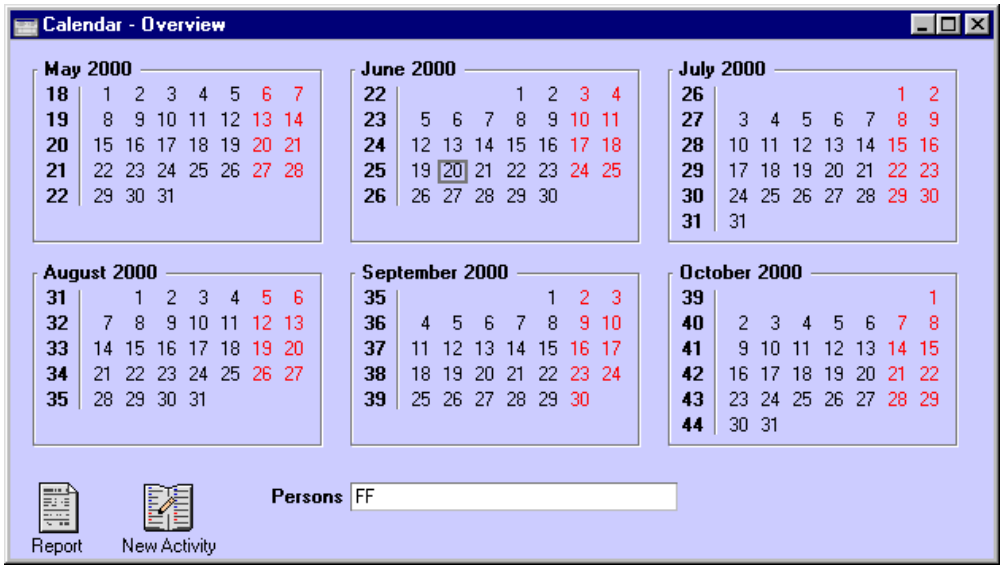
When it opens, the Calendar shows the current month in the centre of the top row, the previous month and the next four months. This six-monthly format is one of the four ways of viewing the Calendar in FirstContact. These four views are—

- The six-monthly view
- The monthly view
- The weekly view
- The daily view

The Four Calendar Views

The Six-monthly View

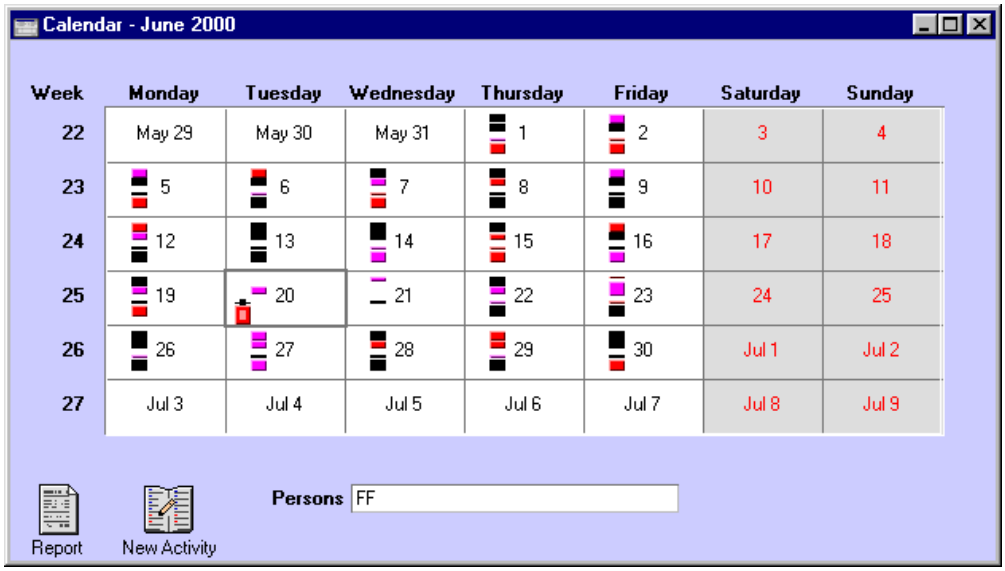
In the six-monthly view, the current date (June 20th in the illustration) is marked with a square and weekends are red.



- To open the six-monthly view, click the [Calendar] button in the Master Control panel.
- To change the months shown, click the Book icon or use the ‘Next’ and ‘Previous’ functions on the Record menu.
- 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 a daily view, double-click on any date.
- To close the six-monthly view, use the close box.

The Monthly View

In the monthly view, the current date (June 20th in the illustration) is marked with a thick border. Weekends are shaded, with dates in red.

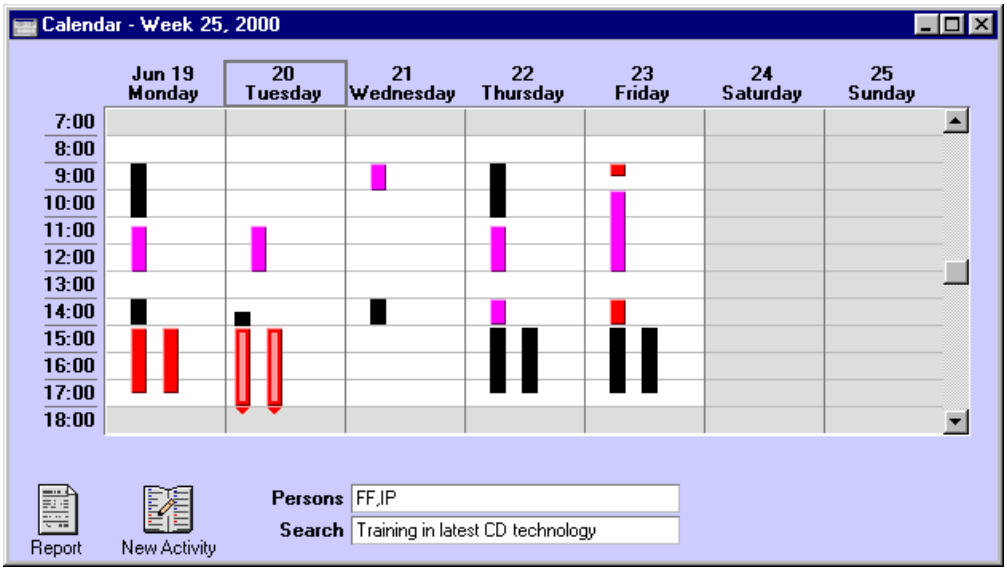


- To open the monthly view, double-click any month name in the six-monthly view.
- To change the month shown, click the Book icon or use the ‘Next’ and ‘Previous’ functions on the Record menu.
- To open a weekly view, double-click on the number of any week.
- To open a daily view, double-click on any 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. Activities whose To Do box is checked (including those whose Done box is checked as well) are not 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 or click the [OK] button. 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.

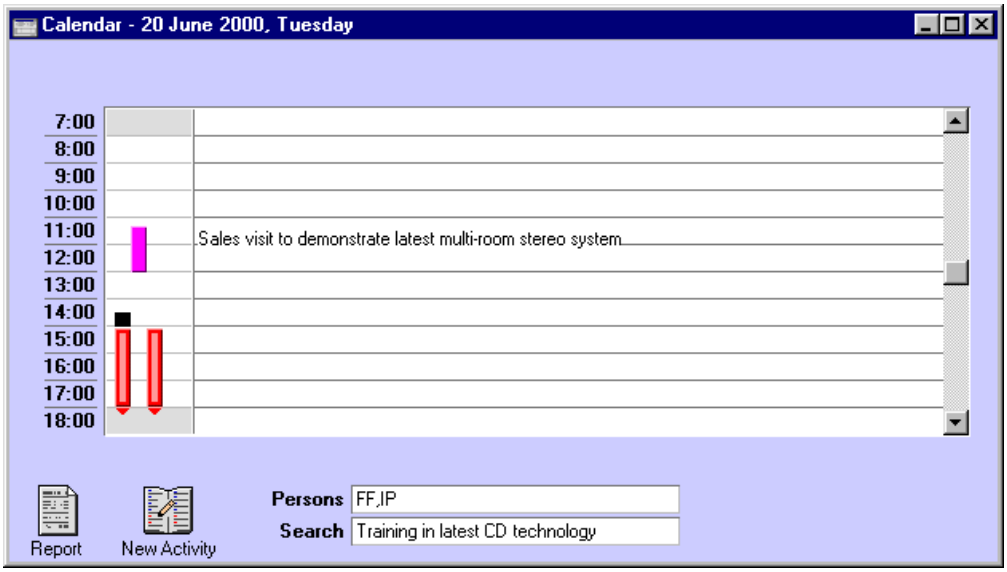
The Weekly View



- To open the weekly view, double-click any week number in the six-monthly or monthly view.
- To change the week shown, click the Book icon or use the ‘Next’ and ‘Previous’ functions on the Record menu.
- 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 a daily view, 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. Activities whose To Do box is checked (including those whose Done box is checked as well) are not 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 or click the [OK] button. 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.
- You can move an Activity to another time and/or date by dragging and dropping.
- To close the weekly view, use the close box.

The Daily View



- To open the daily view, double-click any date in the six-monthly, monthly or weekly view.
- To change the day shown, click the Book icon or use the 'Next' and 'Previous' functions on the Record menu.
- 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.

- The day's Activities are represented by coloured bars. These are solid for Time Activities (the first Activity in the illustration above) and hollow and to the left for Profile Activities (the second and third 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. Activities whose To Do box is checked (including those whose Done box is checked as well) are not 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 or click the [OK] button. 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 daily view, use the close box.

The [New Activity] button

Click the [New Activity] button in any Calendar view to enter a new Activity record. Please refer to the section entitled 'The Activity Register' above 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 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, the probable cause is that the Country Code entered in the Weeks record is different to that on card 2 of the Company Info setting. The two Country Codes should be the same. The Weeks setting is described in Chapter 8, 'System Module'.

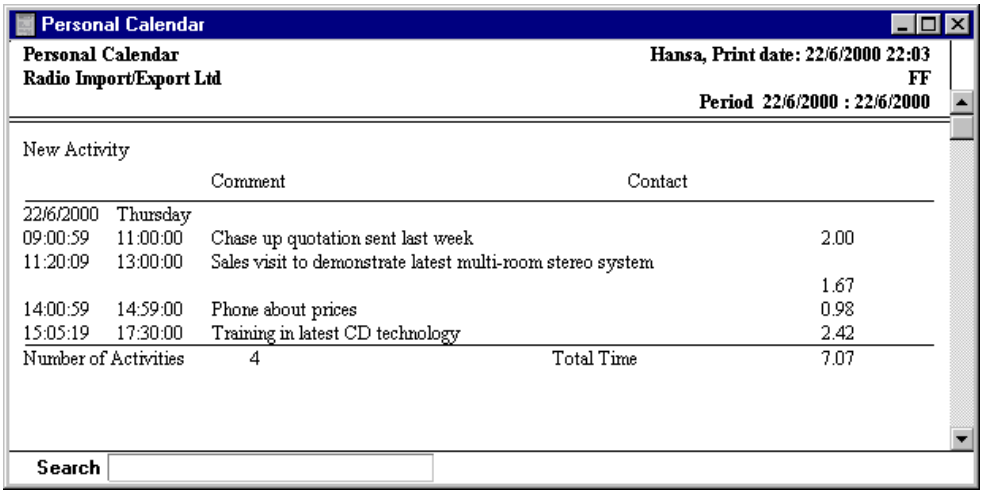
The Personal Calendar Report

The Personal Calendar report is effectively a report version of the Calendar. As with the Calendar, it shows Activities whose To Do box is not checked.

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

To open the Personal Calendar, click the [Report] button in the bottom left-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.



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

New Activity Double-click this text (just underneath the report header) to create a new Activity. On saving and closing the new Activity and returning to the report, select 'Recalculate' from the Special menu. The new Activity will then be shown in the report, providing you did not check its To Do box.

Start Time, Activity Text

Double-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.

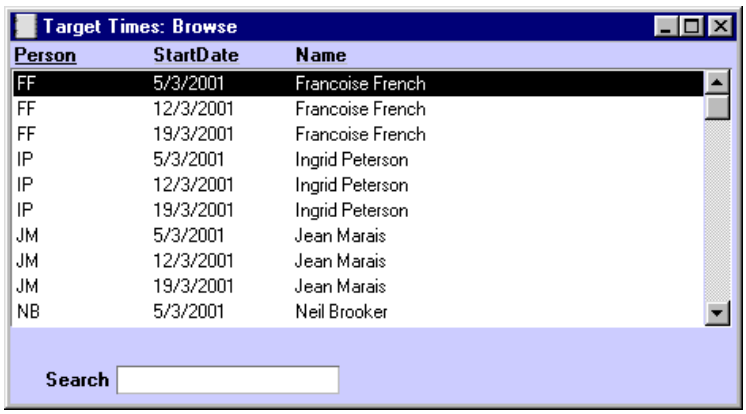
The Target Time Setting

As described earlier in this chapter, 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. However, if Profile Activities are used extensively, they can make the Calendar appear cluttered. If this is a problem, the Target Time setting can be used for these purposes instead. Alternatively, Profile Activities can be used by the employees themselves to book future time while the Target Time setting can be used by managers to set targets for the amount of time their employees are to spend on work of each Activity Type.

Entering Target Time Records

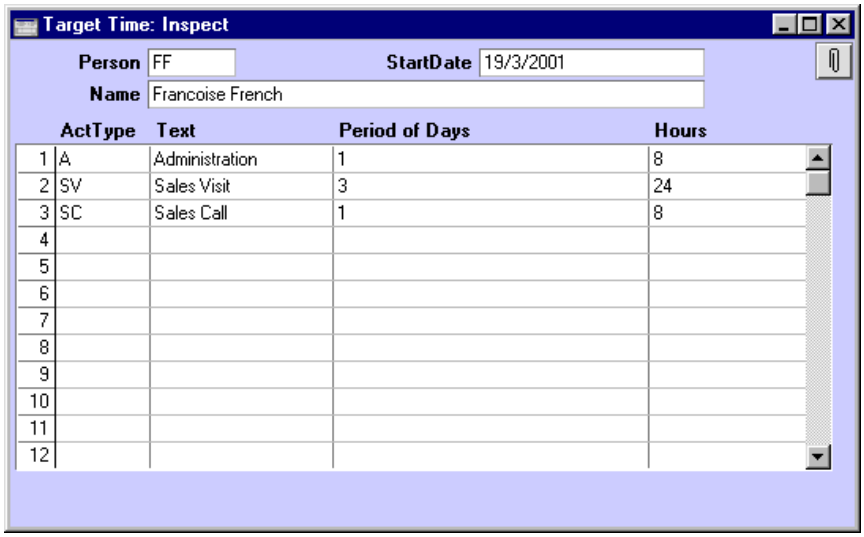
1. Use the Modules menu to enter the Contact module and then select 'Settings' from the File menu or click [Settings] in the Master Control panel. Double-click 'Target Time' in the resulting list.

   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 [Copy] in the Button Bar.

   The 'Target Time: New' window is opened, empty if you clicked [New] or with a copy of the copied Target Time record.



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

Enter the initials of the Person whose time you are booking, 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

Each Target Time record is used to book a Person for a period of time. That period should be at least one day in length (only one record for each Person/Date combination can be entered) but could be much longer. Specify here the date when that period is to start.

It is recommended that you enter separate records for each Person for each day or for each week (as shown in the illustration). Entering Target Time records that cover periods longer than a week is possible, but could result in an inaccurate Employee Planned Time report (see below).

3. Use the grid area of the screen to specify the tasks that it is intended that the Person will be carrying out during the period represented by the Target Time record.

In the Target Time record in the illustration above, a week of an employee's time has been booked. During that week, it is planned that she will spend one day (eight hours) doing administration, three days making sales visits and one day making sales calls. For the purposes of the Employee Planned Time report (described later in this section), she does not have to carry out each task in order. For example, the eight hours allocated for administration can be worked intermittently as the week progresses.

Act Type **Paste Special** Activity Types setting, Contact module

Enter an Activity Type for each task that is to be carried out during the planned period.

Text The Name of the Activity Type is entered after you have entered the Code.

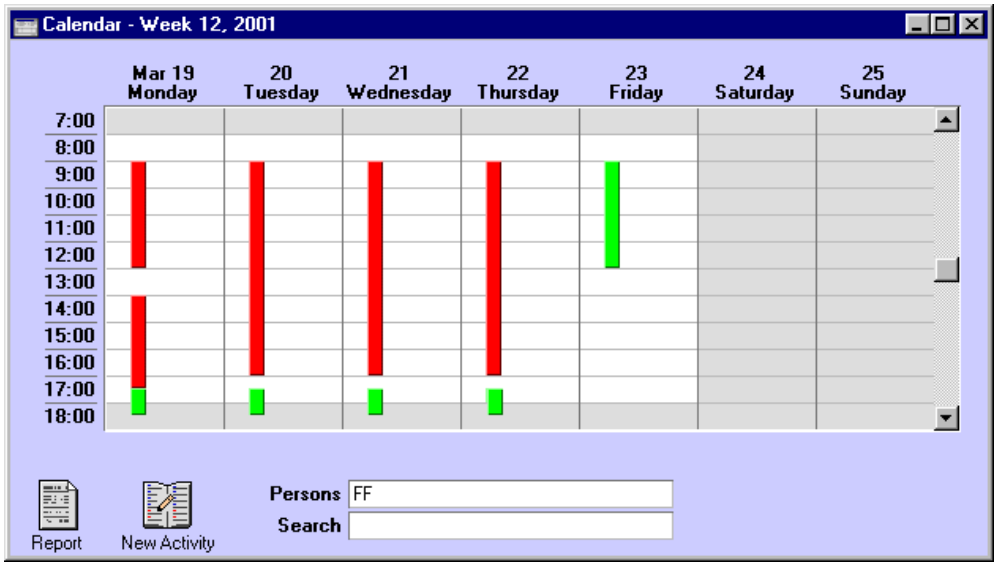
Period of Days The number of days to be spent carrying out the task.

Hours The number of hours to be spent carrying out the task. This is the figure that will be used by the Employee Time Statistics report.

4. Once the Target Time record is complete, save it by clicking the [OK] 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 books a Person for a period of time. As that time passes, the Person should record the work actually carried out by entering Activities as described earlier in this chapter. Continuing the example illustrated above, for example, when Françoise French spends a day making sales telephone calls, she should enter a separate Activity for each call recording the details. These Activities will add to the contact history of the Customers in question and will also ensure that her time is recorded. For the example, these Activities have been entered as Time Activities and their To Do boxes have not been checked, so they are visible in Françoise's Calendar—

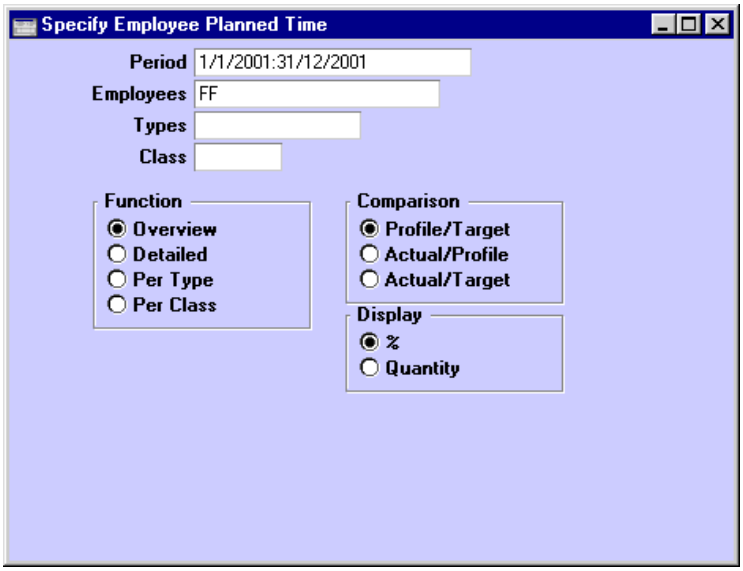


These Time Activities will then be used by Françoise to compare her Target Time with the actual time she spent carrying out the work.

As always with Activities, a consistent and planned approach to the Calendar 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 option 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 Planned Time report can be produced. This report in the Contact module can compare the planned time recorded in the Target Time setting either with actual time recorded using Time

Activities or with time recorded using Profile Activities. The accuracy of this comparison is why it is important that the correct Calendar option is selected in all Activities.

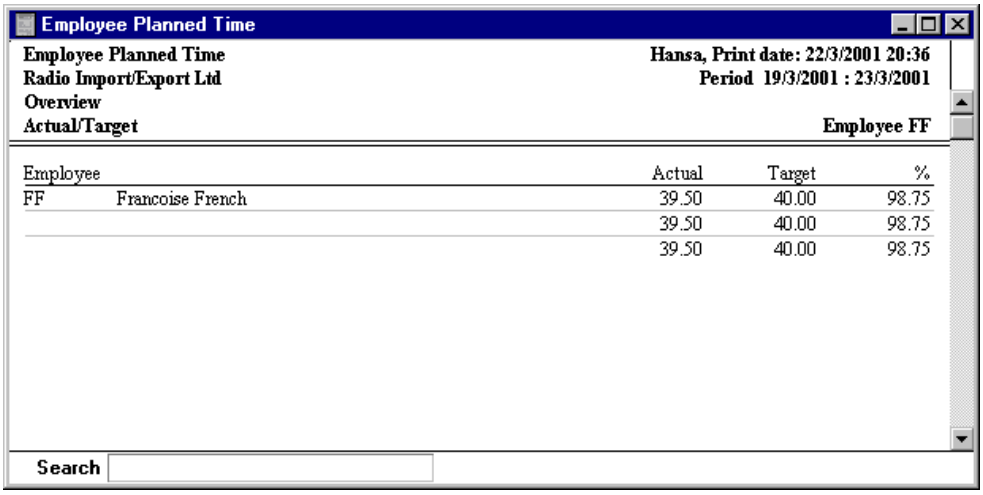


To make the comparison, the report searches for Activities whose Start Date falls in the report period and for Target Time records whose Start Date also falls within the report period. For this reason, it is better to have many Target Time records with few grid entries, rather than few Target Time records with many grid entries. For example, if the report period is one week, a Target Time record whose duration is two weeks will be included in the report in its entirety providing its Start Date falls in the report period. But a Target Time record starting before and extending into the report period will not be included at all, because its Start Date is outside that period.

Activities will be included in the comparison irrespective of whether their To Do boxes have been checked.

Note too that if you are using Profile Activities instead of the Target Time register to book future time, you can still use this report to compare this booked time with actual time. And, if the Target Time setting is being used by managers to set targets for the amount of time their employees are to spend on work of each Activity Type and the employees are using Profile Activities to plan their own time, the report can compare these two planned time figures as well. Simply select the correct comparison option.

The overview version of this report simply compares Actual Time (i.e. calculated from Time Activities) with Target Time—



The detailed version of the report can be used if you want to analyse the hours spent working on each Activity Type.

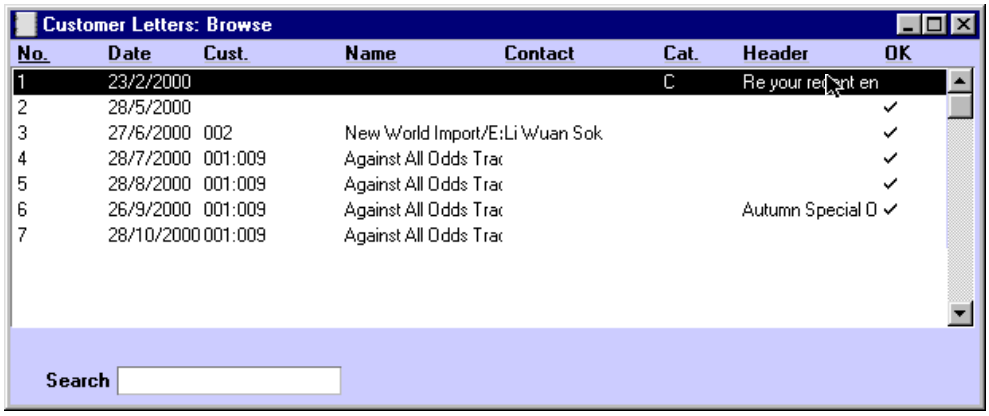
The Customer Letter Register

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

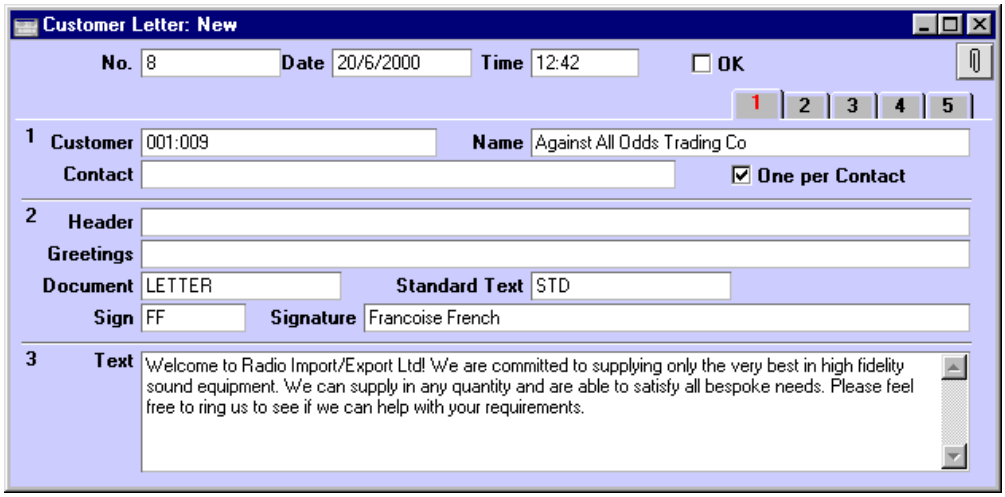
In the Contact module, select 'Customer Letters' from the Registers menu, or click the [Letters] button in the Master Control panel.

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



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

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



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 numbered buttons ('tabs') in the header.

By clicking the tabs you can navigate between cards.

Header

No. **Paste Special** Select from another Number Series

This Number is the unique identifier for this Customer Letter record. When creating a new record, FirstContact 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.

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 Special menu.

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

Card 1

This card is used in combination with card 5 to select the Customers and Contacts to whom the letter is to be sent.

Customer **Paste Special** 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 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.

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, Contact 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.

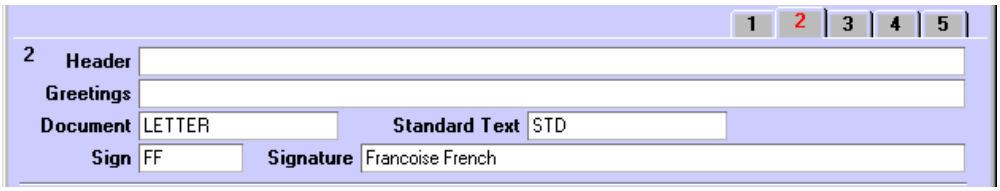
If no Contact is specified here and the One per Contact check box below is not checked, a single letter will be produced for each selected Customer, addressed to the main Contact entered on card 1 of each Customer record.

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 card 1 of each Customer record).

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 card 1 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 card 5.

Card 2



This card is used in combination with card 3 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 FirstContact, 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 FirstContact.

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 Chapter 8, 'System Module' and, with an example specific to letter design, in the 'Printing Customer Letters' section below. Use the 'Properties' function on the Special 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 Contact module and open the 'Documents' list window using the 'Documents' item on the File menu.
3. Highlight 'Customer Letter' in the list and select 'Define Document' from the Special menu. In the

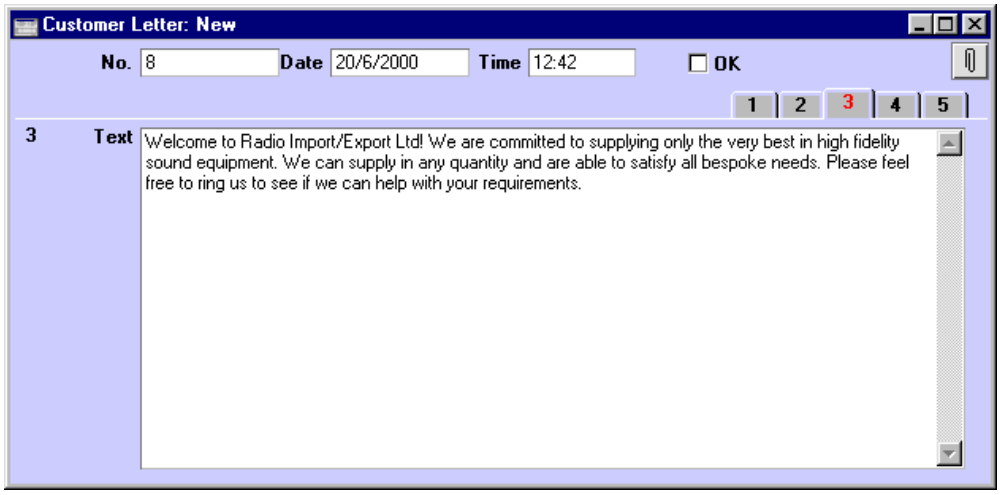
subsequent window, enter the Form Code ("LETTER", in our example) in the Form field on the first row. Unusually in a 'Define Document' window, only the first row is used, so you cannot use this window to determine that a different Form is to be used according to the Access Group of the current user, for example.

4. Once this has been done, the "LETTER" Form will be used if the Document field on Card 2 of the Customer Letter record is blank. If you wish to use a different Form, specify that using the Document field. The Form specified in this field will be used instead of that specified in the 'Define Document' window.

Standard Text **Paste Special** Standard Texts setting, Contact module

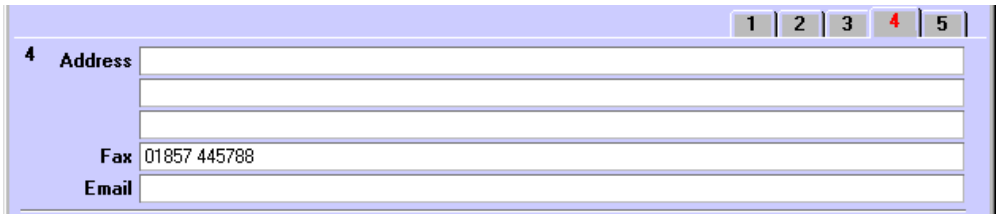
If appropriate, use this field to select a Standard Text record. The text itself will appear in the field on card 3.

Card 3



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

Card 4



If a single Customer has been specified on card 1, 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 Contact Person record. These can be amended here for this letter only.

Card 5

This card is used in combination with card 1 to select the Customers and Contacts to whom the letter is to be sent.

Category **Paste Special** Customer Categories setting, Contact module

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 card 1 is blank: it will be ignored if the Customer field contains a value.

Cust. Class **Paste Special** Customer Classifications setting, Contact 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 card 1, all Customers in that range that are of the particular Classification will be mailed.

Contact Class	**Paste Special**	Customer Classifications setting, Contact module

If you wish to mail all Contacts of a particular Contact Classification, specify that here.

This field assumes that the Customer field on card 1 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, Contact module

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

This field assumes that the Customer field on card 1 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.

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 Special menu. This produces a report showing the full letter text and a list of recipients.

When everything is satisfactory, the Customer Letter record can be approved by checking the OK box. 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 [OK] 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.

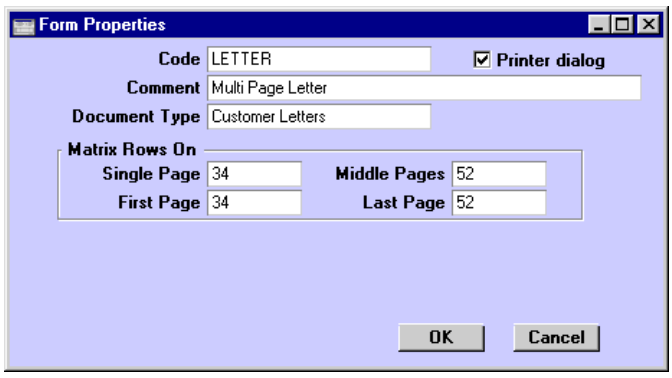
The design should take into account what is to happen when the printing of a letter requires more than one page. Usually, in such cases the address, date and greeting are printed on the first page only. This means the letter text might start higher up on the second and subsequent pages compared to the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



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.

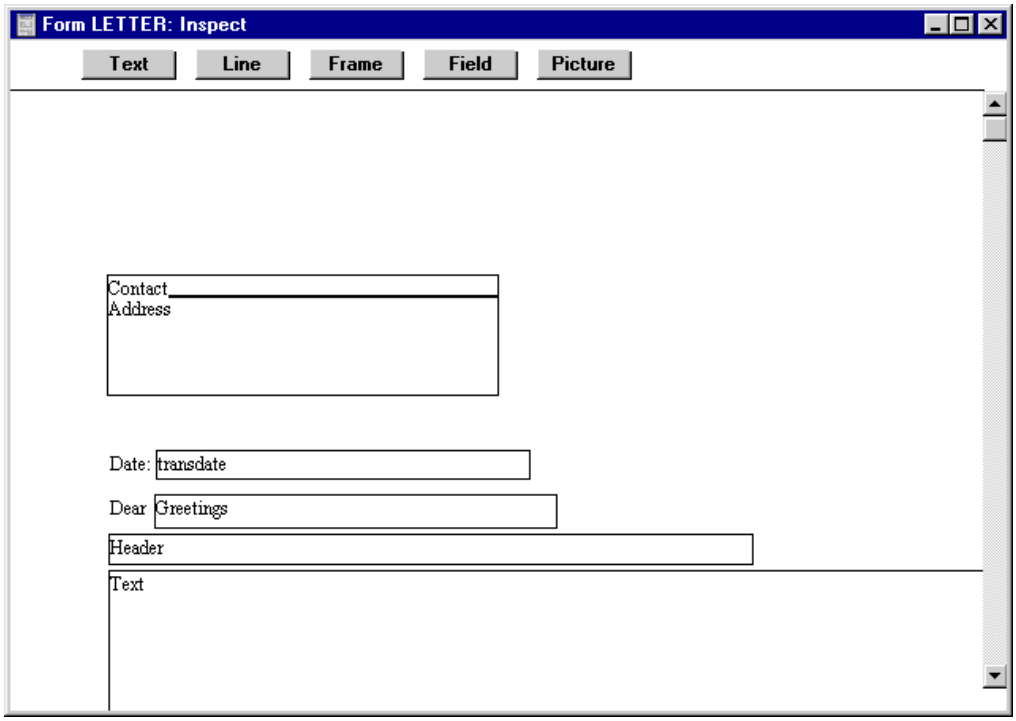
Usually, the First and Single page designs will be the same.

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)—

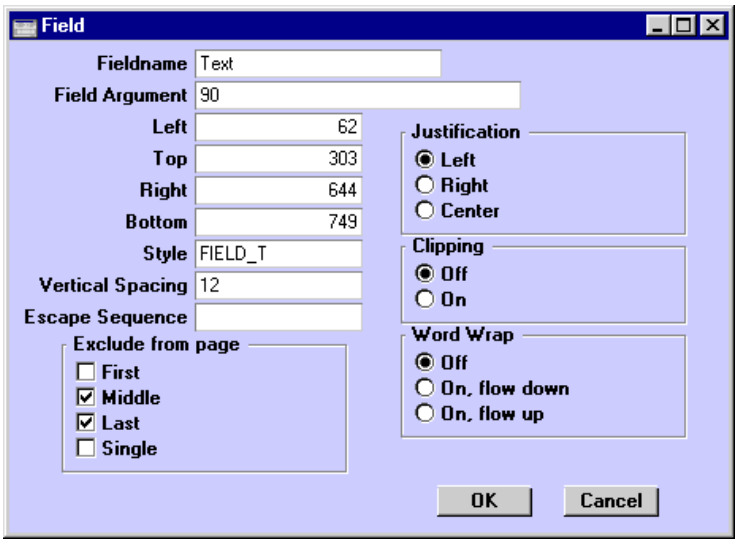
Lines of Text	Pages	Type of Page
Up to 34	1	Single
35-87	2	First and Last
88-139	3	First, Middle and Last
140-191	4	First, 2 x Middle, Last

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

4. 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—



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—



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.

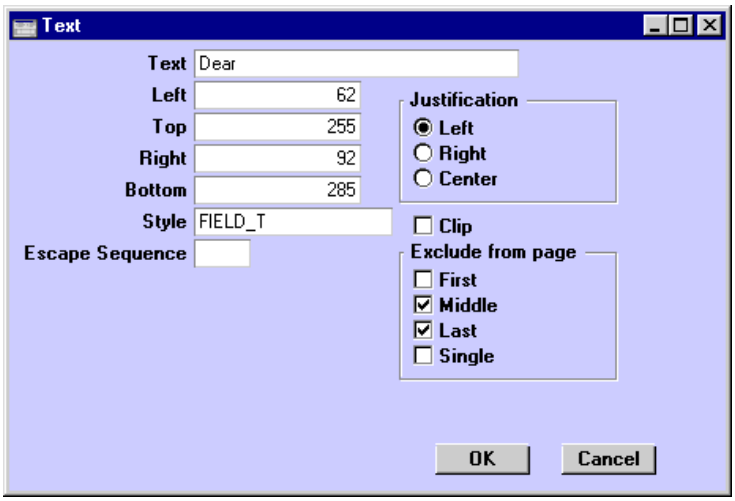
Top, Bottom — Don't forget to ensure that the Text field is deep enough to accommodate the required number of lines of text in the specified font (34 lines in the example).

Field Argument Entering a number here such as 90 (as in the illustration) will indicate that the maximum line width will be 90 characters (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.

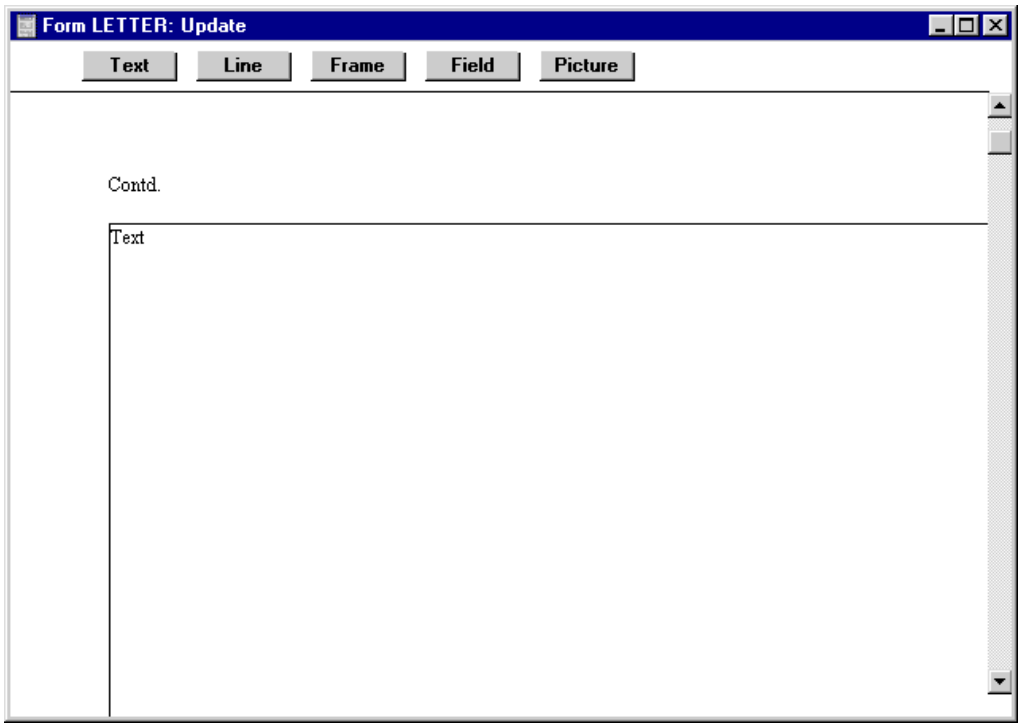
Text objects can be added to the design in a similar manner, by clicking the [Text] button at the top of the window and then drawing a box on the Form where the object is to appear. When the 'Text' window opens, type the text that is to be printed on the Form in the Text field. This can be up to 80 characters 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—

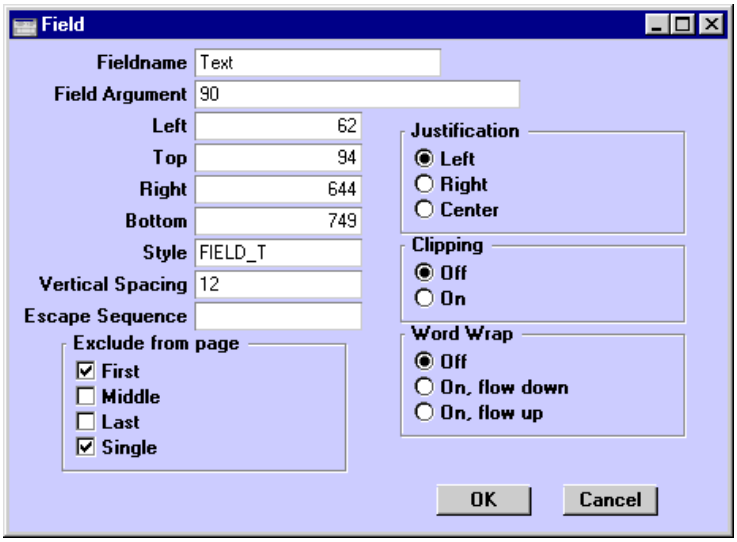


Click the [OK] button in the dialogue box to save the text object specifications, and repeat as necessary until all text objects for the First and Single pages have been added.

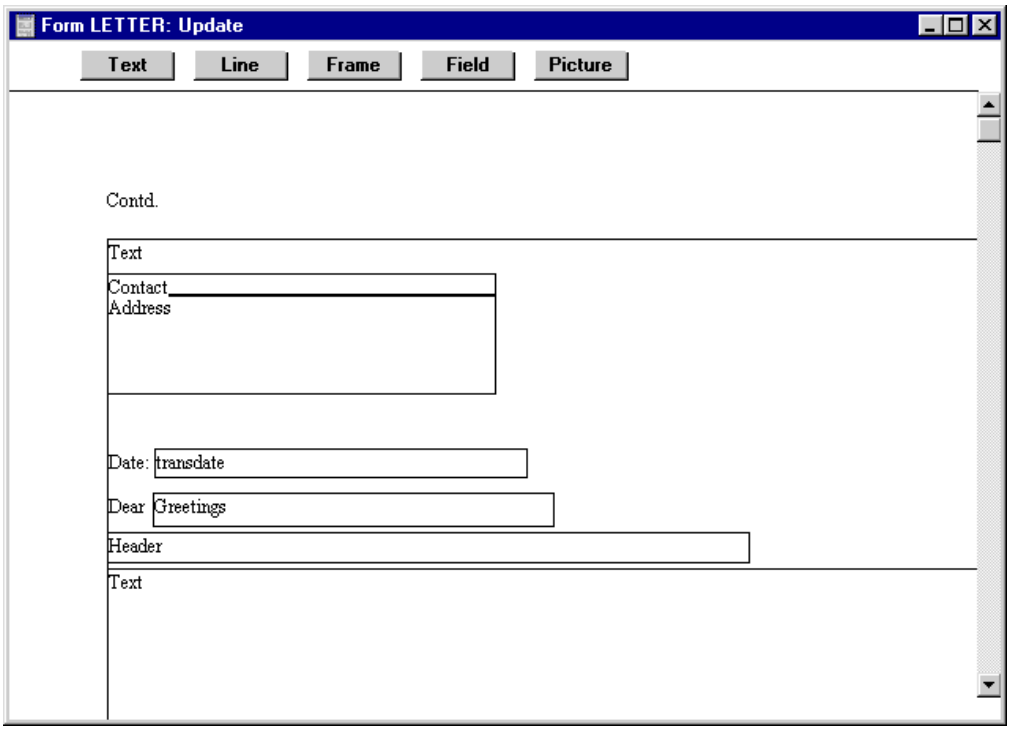
5. Now design the Middle and Last pages. In our example, they will be the same. To help with this, you can hide the objects added in step 4 above. To do this, select 'Middle Only' from the Special menu. This displays only those objects that are to be printed on the Middle page. At this stage, there are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

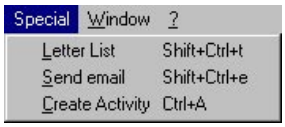
7. If any object is not aligned correctly, dragged it into position using the mouse, or double-click it to open its specification window and type in the correct co-ordinates.

8. When the design is complete, click the [OK] button in the Button Bar to save the Form.

9. Now you should inform FirstContact 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 earlier in this chapter describing card 2 of the Customer Letter record.

Special Menu

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



Letter List

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

Send email

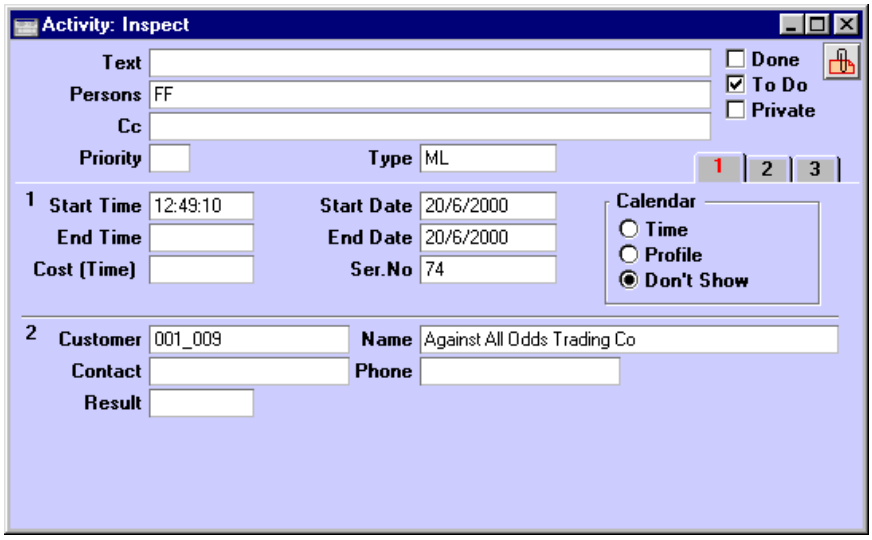
This function will send the letter text to all recipients by email. The email addresses will be taken from the Contact Person or Customer registers as necessary. The return address (sender's address) will be taken from the Person whose initals appear on card 1 of the Customer Letter record.

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 Chapter 6, 'Mail', for full details of FirstContact's mailing facilities.

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 is controlled using the Activity Types, Subsystems setting.

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



A new record is opened in a window entitled ‘Activity: Inspect’. This means that it has not yet 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. After amendment if necessary, save the record in the Activity register by clicking the [OK] 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 Quotation, 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 Activities created automatically when each Customer Letter is approved. Again, this is controlled using the Activity Types, Subsystems setting. The Done and To Do boxes in Activities created this way will both be checked by default.

Please refer to the sections earlier in this chapter for full details of the ‘Activity: Inspect’ window and the Activity Types, Subsystems setting.

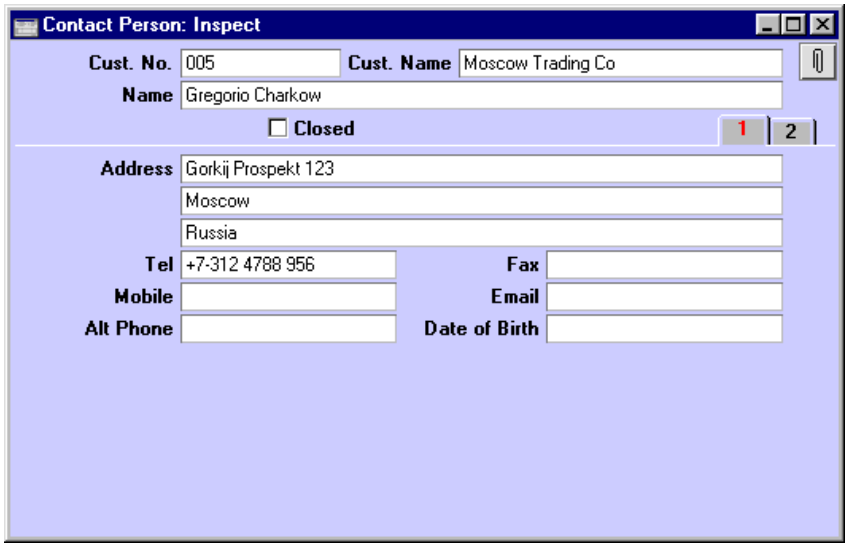
The Contact Person Register

When entering records to the Customer register, the name of the main contact person can be recorded using the Attn. field on card 1 of the Customer record. This name will be brought in as a default whenever the Customer is used in a Quotation.

If it is necessary to enter further Contact Persons, this can be done using this register. Then, when in the Attn. field of a Quotation or Customer Letter, selecting 'Paste Special' will list all Contacts for the specified Company, including the main contact.

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

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.



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 numbered 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** 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.

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

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.

Card 1

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

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

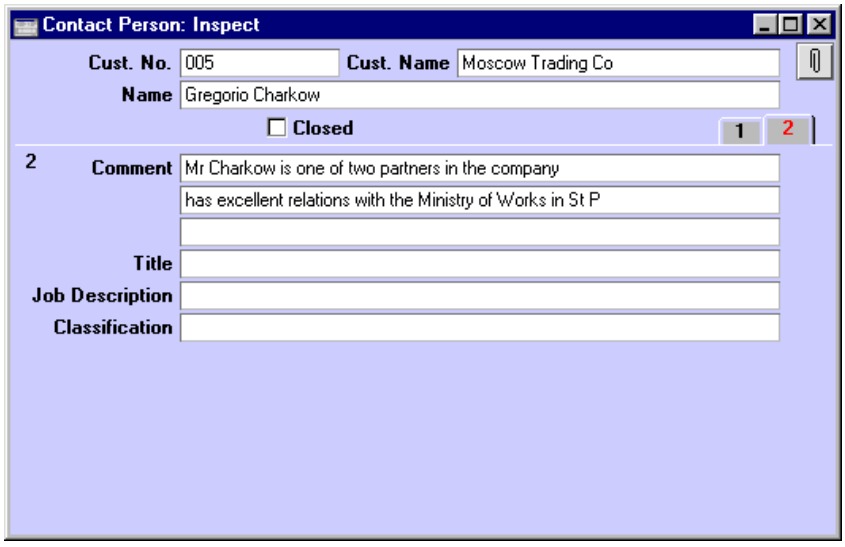
Mobile The Contact's mobile number.

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 FirstContact.

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.

Card 2



Comment Any comment.

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, Contact module

This field is used to describe the role of the Contact within their company. It should be used 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. The generic title (“Finance Director”) would be placed 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, Contact module

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”.

As with the Classification field on card 1 of the Customer screen, more than one entry can be made to this field, separated by commas.

Documents

The ‘Documents’ function permits the printing in batches of particular documents or Forms. Documents concerned with FirstContact’s contact management tools can be printed from the Contact module. Use the Modules menu to ensure you are in the Contact module and then select the ‘Documents’ item on the File menu or use the Ctrl-D (Windows) or ⌘-D (Macintosh) keyboard shortcut. Then, to print a document, follow this procedure—

1. Highlight the appropriate item in the list.

2. Using the Special 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 Chapter 2, ‘FirstContact’s Work Area’, for full details of this feature) or Fax (if your hardware can support this feature).

3. Click [OK]. 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 [OK] again 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 Chapter 8, ‘System Module’.

2. Change to the Contact module and open the ‘Documents’ list window using the ‘Documents’ item on the File menu.

3. Highlight each item in the list and select ‘Define Document’ from the Special 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 Chapter 2, ‘FirstContact’s Work Area’.

4. For each document, the ‘Define Document’ function only needs be used once. After this has been done, Form selection will be automatic.

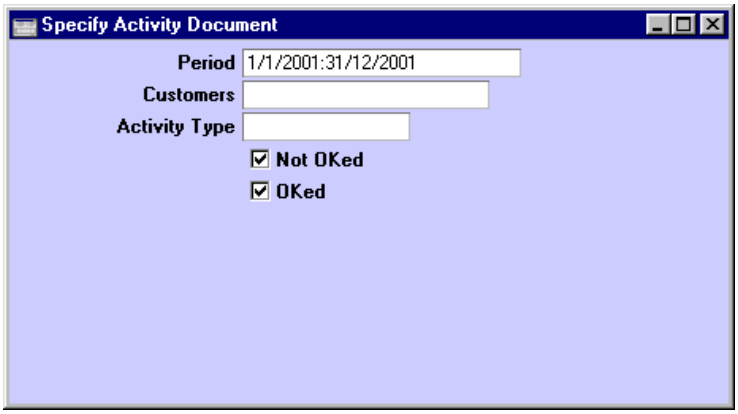
The selection process for each document is described below. In all cases, leave all the fields in the specification window blank if documents for all the records in the database are to be printed. If it is necessary to restrict the number of documents printed, use the fields as described.

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 holding down the Shift key when clicking the Printer 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.



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. FirstContact will then convert it to period format by inserting a colon and repeating the date.

Customer No	**Paste Special**	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, Contact 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.	

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 card 3 to the recipients as determined on cards 1 and 5. Before printing, you can obtain a list of the recipients using the Letter List report.

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.	

Nr **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 card 5.

Remember that if a Customer Letter has a Customer Category on card 5 and its Customer field on card 1 is blank, letters will be printed to all Customers belonging to that Category. However, if the Customer field on card 1 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

If a Form is specified here, letters will be printed from all Customer Letter records with that Form specified in the Document field on card 2.

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.

Print These options are only used when printing letters to a range of Customers, as follows—

Customer’s Address

The address of each letter will be taken from the Customer records, even if different Addresses have been entered for some or all of the Contacts.

Contact’s Address

The address of each letter will be taken from the Contact Person records.

When printing letters to a single Customer, the address is taken from card 4 of the Customer Letter.

Reports

Reports concerned with FirstContact's time and contact management tools are located in the Contact module. Use the Modules menu to ensure you are in the Contact module and then 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, highlight the appropriate item in the list. Using the Special menu, determine the print destination of the report (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 the print destination has been chosen, click [OK]. A specification window will then appear, where you can decide what is to be included in the report. Click [OK] again to print the report.

In all cases, leave all the fields in the specification 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.

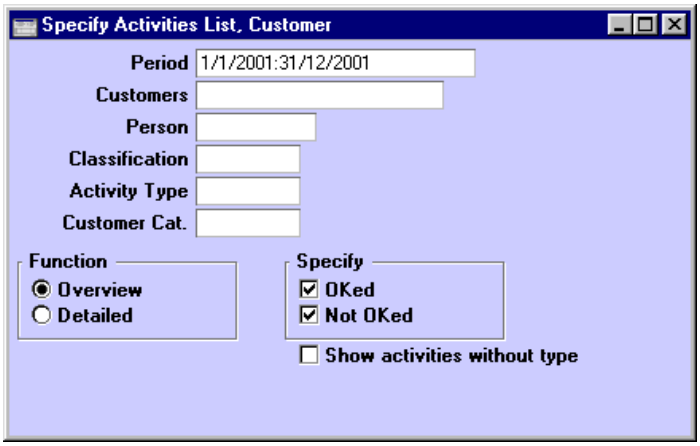
Where specified below, it is often possible to report on a selection range, such as a range of Customers. To do this, enter the lowest and highest values of the range, separated by a colon. For example, to report on Customers 001 to 010, enter "001:010" in the Customer field. Depending on the field, 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.

With a report in the active window, the 'Recalculate' command on the Special menu can be used to update the report after making alterations to background data.

Activities, Customers

This report lists Activities sorted by Customer. 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 FirstContact's Drill-down feature. Double-click on a Person's initials to produce an Activities, Persons report for that Person.



Period **Paste Special** Reporting Periods setting, System module

Enter a reporting period. To produce a report for a particular day, simply enter the date once. FirstContact will then convert it to period format by inserting a colon and repeating the date.

Customers **Paste Special** 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.

Classification **Paste Special** Customer Classifications setting, Contact 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.

Activity Type **Paste Special** Activity Types setting, Contact module

Enter an Activity Type to list Activities of that Type.

Customer Cat. **Paste Special** Customer Categories setting, Contact module

Enter a Category Code to list Activities featuring Customers in a particular Category.

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 Comment.

Detailed In addition to the information shown in the Overview, this option shows all details entered in the grid area on card 3 of the Activity screen.

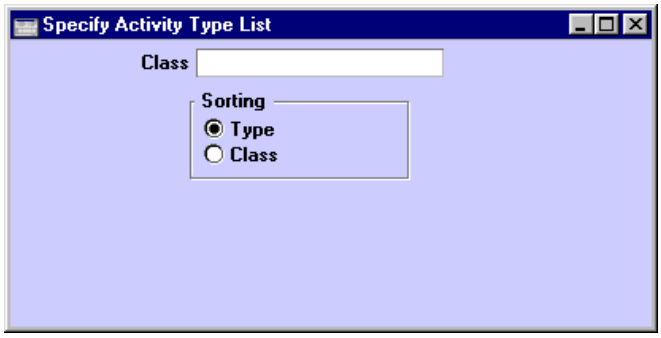
Specify Use these options to determine whether the report is to contain only Done Activities, not Done Activities or both.

Show Activities without Type

If you have some Activities that do not have an Activity Type and wish to include them in the report, use this option.

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, Contact module

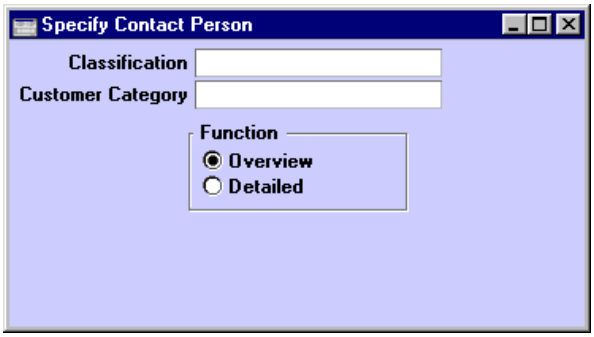
Range Reporting Alpha

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.

Contact List

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



Classification

Paste Special Customer Classifications setting, Contact 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.

Customer Category

Paste Special Customer Categories setting, Contact module

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

Function These options control the amount of information shown in the report.

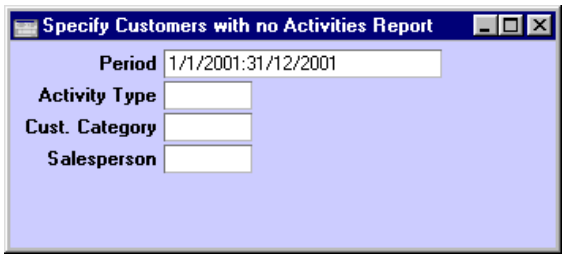
Overview This option shows the name of each Contact Person, together with contact details (telephone, fax and mobile numbers and email address).

Detailed In addition to the information shown in the Overview, this option also shows the full address for each Contact together with Customer Code, Comment, Title, Job Description and Contact Classification.

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 FirstContact's Drill-down feature. Double-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, Contact module

If an Activity Type is entered here, the report will list the Customers with no Activities of that Type recorded during the report period.

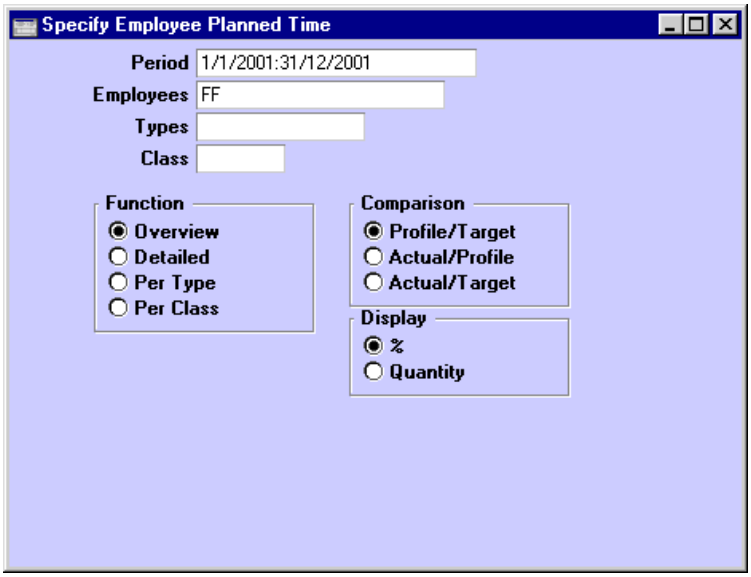
Cust. Category	**Paste Special**	Customer Categories setting, Contact module
	Enter a Customer Category here if you would like the report to list the Customers belonging to that Category that have not been contacted during the report period.	
Salesperson	**Paste Special**	Person register, System module
	Enter a Person's initials to list the Customers with a particular Salesman that have not been contacted during the report period.	

Employee Planned Time

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 also falls within the report period.

For this reason, it is better to have many Target Time records with few grid entries, rather than few Target Time records with many grid entries. For example, if the report period is one week, a Target Time record whose duration is two weeks will be included in the report in its entirety providing its Start Date falls in the report period. But a Target Time record starting before and extending into the report period will not be included at all, because its Start Date is outside that period.

Activities will be included in the comparison irrespective of whether their To Do and Done boxes have been checked. Activities that have been marked as Don't Show are not included in the calculations.



Period — **Paste Special** — Reporting Periods setting, System module

The report period. Depending on the selected comparison method (see below) all Activities and Target Time records whose Start Date falls in the period will be included in the calculations.

Employees — **Paste Special** — Person register, System module

Range Reporting — Alpha

Enter a Person's initials to produce a report comparing the planned and actual hours worked by a single employee.

Types — **Paste Special** — Activity Types setting, Contact 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 when calculating the numbers of planned and actual hours.

Class **Paste Special** Activity Classes setting, Contact module

If you enter an Activity Class here, only Activities and Target Time records whose Activity Types belong to that Class will be used when calculating the numbers of planned and actual hours.

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.

Comparison The report compares actual with target time. Three methods are available by which these two figures are calculated. Note that Activities marked as Don't Show are not included in any comparison method.

- **Profile/Target** Actual time is calculated using Profile Activities. Target time is calculated using records in the Target Time register.
- **Actual/Profile** Actual time is calculated using Time Activities. Target time is calculated using Profile Activities.
- **Actual/Target** Actual time is calculated using Time Activities. Target time is calculated using records in the Target Time register.

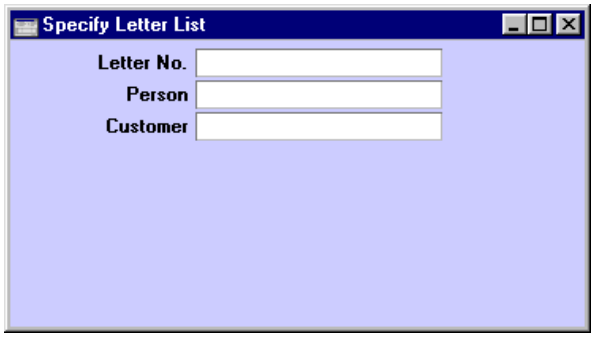
Display The final column of the report shows how the actual figure compares with the target figure. This comparison is calculated as follows—

% The comparison shows the actual figure expressed as a percentage of the target.

Quantity The comparison shows the actual figure subtracted from the target.

Letter List

This report is a duplicate of that produced by the 'Letter List' function on the Special 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.



Letter No. Enter the Serial Number of a Customer Letter record (or a range of Serial Numbers) to show

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

Enter a Person's initials to list all Customer Letters signed by that Person.

Customer **Paste Special** 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.

Telephone List

This report is similar to the Contact List described above in that it lists Contacts in the Contact Person register.

Customer **Paste Special** Customer register

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

Classification **Paste Special** Customer Classifications setting, Contact 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.

Customer Category

Paste Special Customer Categories setting, Contact module

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

Job Description **Paste Special** Job Descriptions setting, Contact 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.

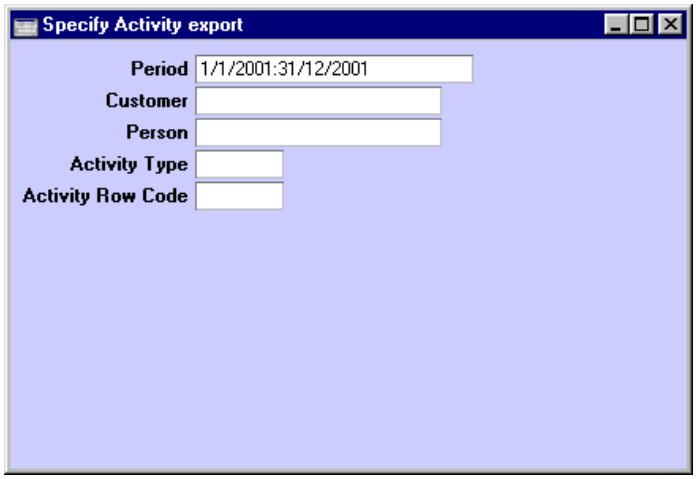
Exports

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 FirstContact 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 using the Ctrl-E (Windows) or the ⌘-E (Macintosh) keyboard shortcut, having first ensured you are in the Contact module.

On selecting the function, the ‘Exports’ list window appears. This lists the Exports which can be produced from the Contact 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 [OK] again to name the file and to determine where it is to be saved.

Activities

This command exports data from one or more Activities.



Period **Paste Special** Reporting Periods setting, System module

Enter the start and end date of the reporting period.

Customer **Paste Special** Customer register

Range Reporting Alpha

Limit the selection to Activities recorded or scheduled for a single Customer (or a range of Customers).

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, Contact module

Enter an Activity Type to limit the export to Activities of that Type.

Activity Row Code

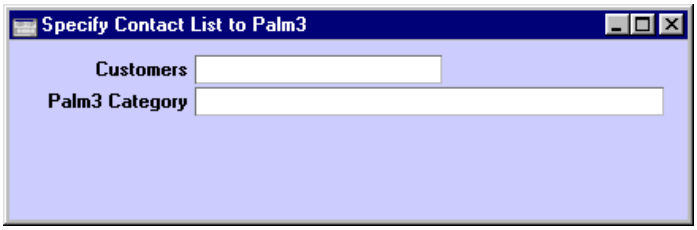
Paste Special Text Types setting, Contact module

Enter a Text Type to limit the export to Activities featuring that Type.

Press [OK] to start the export. When it has finished, close the 'Export' window using the close box.

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** 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.

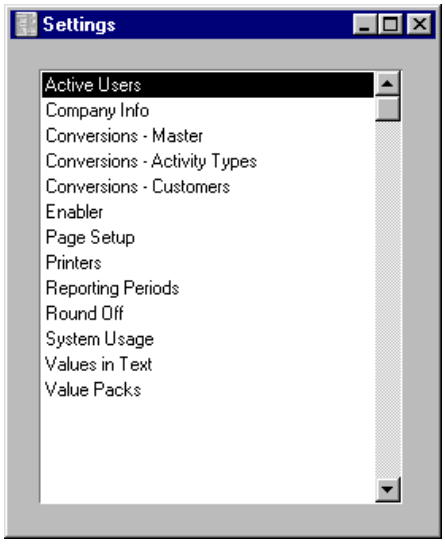
FirstContact System Module

Chapter 8: The System Module

This module contains settings and registers used collectively by the other modules. It is where housekeeping tasks such as backing up and licencing are carried out. It is also where the administration of users, including the allocation of access rights to the other modules, is carried out.

Settings

The following settings are available in the System module—



To edit a setting, ensure you are in the System 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.

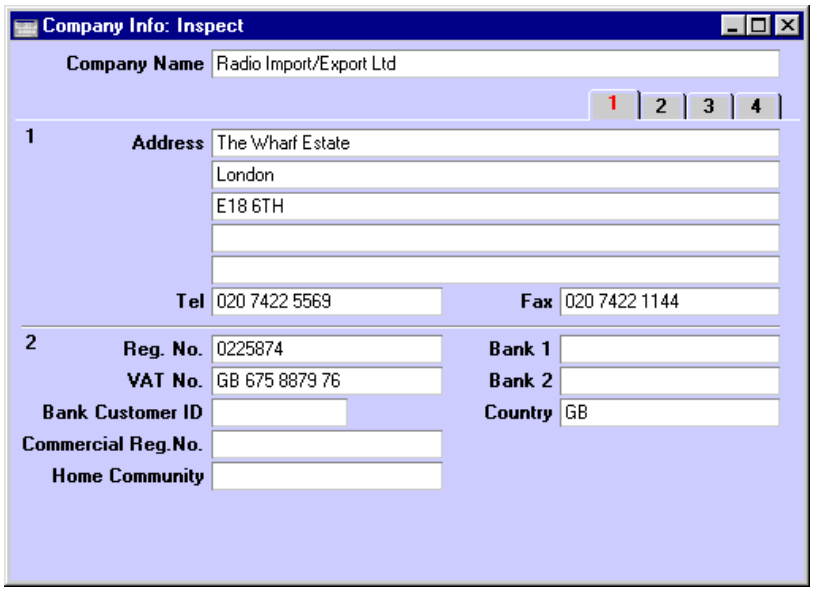
Active Users

This setting lists the current users in a network (multi-user) installation of FirstContact.

Company Info

This setting is used to enter your company's name and address, and other particulars such as phone and fax numbers, and the bank and bank account number. The information in this setting will be printed as appropriate on all documents. In addition, the Company Name as entered will be shown in the Company Box to the right of the Button Bar.

To open the Company Info setting, double-click on 'Company Info' in the 'Settings' list. The 'Company Info: Inspect' window is opened.



Apart from the Company Name, Address etc, this window should be completed as listed below. Confirm the entry by clicking [OK], or cancel it by closing the window using the close box.

Card 2

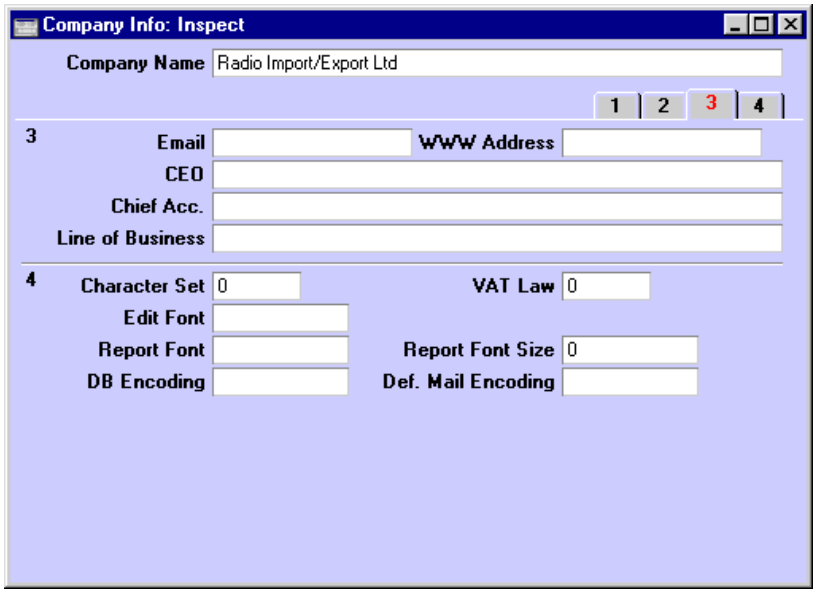
Bank 1, Bank 2 Your company's main bank account number(s) should be entered here. This information can then be printed on any appropriate documentation.

Bank Customer ID

This is an ID number used for automatic (modem) communication with certain credit institutions in some countries. Please contact your local FirstContact representative for details.

Country The same code should be entered to this field and to the Country field in the Weeks setting, to enable week numbers to appear in the Calendar.

Cards 3 and 4



Character Set This field is used to control sorting in FirstContact. In the UK, it should be set to zero. In countries where the alphabet differs to that of the UK/US, sorting by ASCII codes produces a list that is not in the correct alphabetical order: this field is used to overcome this problem.

VAT Law This field is used to ensure the behaviour of FirstContact conforms to certain local conventions of the country in which it is being used. In the UK, this should be set to zero.

Edit Font, Report Font, Report Font Size

These allow you to select different fonts for use on screen and in reports respectively. If nothing is entered in these fields, FirstContact's default fonts will be used. These fonts are selected for maximum readability, and should only be changed if you have good reasons to do so. In non-English versions of FirstContact, these fields are used to select fonts with special character sets.

Conversions - Master, Conversions - Activity Types

These settings allow you to change the Activity Type in all Activities. For example, assume that you have been using Activity Type “S”, and that for some reason you want to use Activity Type “ST” instead. This setting allows you to change Activity Type “S” in every past Activity in which it has been used to Activity Type “ST”. The Activities will appear under the new Activity Type in all reports. To do this recoding you must follow the steps below—

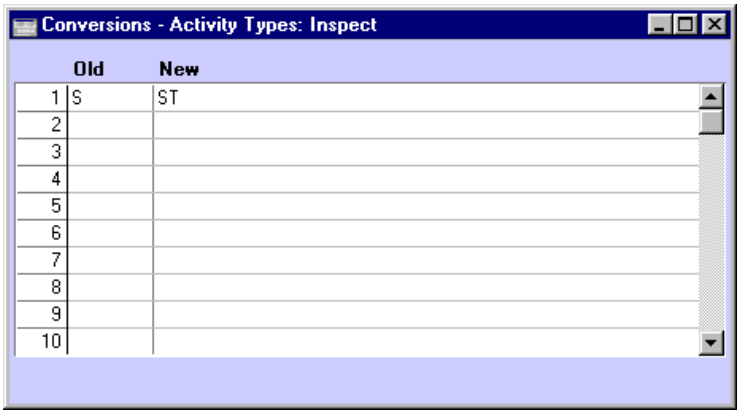
1. Make a back-up of your entire database and quit FirstContact.

2. Remove the FirstContact database file (named “1Contact.HDB”) from the folder or directory containing your FirstContact application. Ensure, however, that the “DBDef.txt” and “Default.txt” files are present.

3. Launch FirstContact again. Because there is now no “1Contact.HDB” file, a new database is created. Enter new Company information to the dialogue (a Code and Name is sufficient): click [OK] and double-click the new Company in the subsequent list.

4. When the ‘Import files available’ window appears, close it by clicking the close box. Do not import anything yet.

5. Select ‘System Module’ from the Modules menu, and ‘Settings’ from the File menu. Double-click ‘Conversions - Activity Types’. Enter the old and new Activity Types one by one in the window as shown in the illustration. Finish by saving the setting by clicking [OK].



6. From the ‘Settings’ list, select ‘Conversions - Master’ and enter a check mark in the Convert Activity Types check box. Save the setting by clicking [OK].

7. Select ‘Imports’ from the File menu and import the back-up using the ‘Automatic’ or ‘Automatic, manual file search’ import routines.

8. The routine will apply the new Activity Type to all Activities with the old Type. In the example, Activities which were of Type “S” will be given the new Type of “ST”. Any use of the old Activity Type elsewhere (e.g. in the Target Time setting) will also be changed.

   If the Activity Type “ST” existed as a record in the Activity Types setting in the old database, the old Activity Type (“S”) will be deleted. If the Activity Type “ST” did not exist in the old database, the old Activity Type will have its Code changed from “S” to “ST”.

! ***If you have more than one Company in your database, the conversion will apply to all Companies in that database.***

Conversions - Master, Conversions - Customers

The Conversions - Master and Conversions - Customers settings can be used in much the same manner as described in the previous section to change the Customer Number of a Customer record. For example, Customer Number “001” can be changed to “002”, and all Quotations and Activities will be changed as well.

To do this, follow the numbered steps as described in the previous section, using the Conversions - Customers setting in place of the Conversions - Activity Types setting and with the following differences—

i In step 5, the Conversions - Customers setting can be used to carry out a simple change of Customer Number as already described. It can also be used to add a prefix or suffix to existing Customer Numbers, as follows—

Old	New	Result
+	A	“A” will be placed in front of all Customer Numbers
-	A	“A” will be placed at the end of all Customer Numbers

The prefix or suffix will be added to all Customer Numbers in the database.

ii In step 6, check the Convert Customers box instead of the Convert Activities box.

iii. The routine will convert all occurrences of the old Customer Number to the new one (in the Customer register and in the Quotation and Activity registers).

If the new Customer Number (002 in the example) existed as a record in the Customer register in the old database, the record with the old Customer Number (001) will be deleted. In this circumstance, the Customer Number in Activities and Quotations will be changed from 001 to 002, but the Customer Name in those records will not be changed to that of the new Customer. If the new Customer did not exist in the old database, the old Customer will have its Number changed from the old one (001) to the new one (002).

Enabler

Please refer to the section entitled ‘The Database Key’ in the first chapter of this manual for full details of this setting.

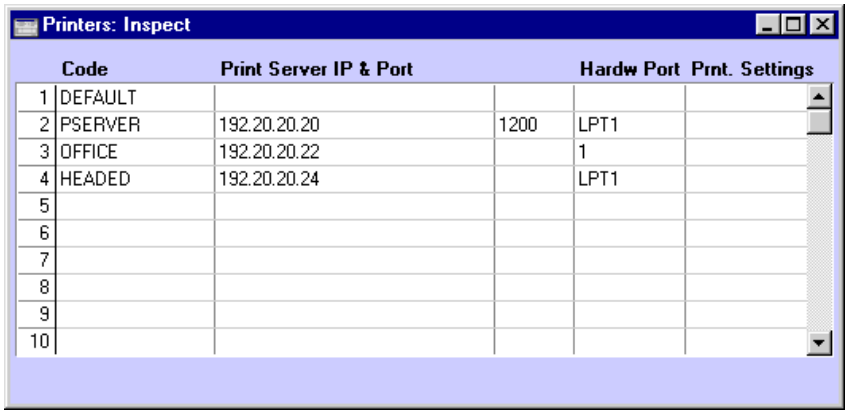
Printers

This setting is associated with the use of printers other than the primary printer selected in the Windows Control Panel or the Macintosh Chooser. The Printers setting lets you redirect the printer output to a different printer.

This is practical if for instance you want to print reports to a laser printer and documents, e.g. Quotations, to a dot matrix printer using pre-printed continuous stationery.

The printers defined here are used when printing documents. Reports are always printed to the printer selected in the Control Panel (Windows) or the Chooser (Macintosh). Windows users can direct reports to specific printers by opening a list of reports, highlighting one in the list, selecting 'Page Setup' from the File menu and selecting a printer there.

Double-clicking 'Printers' in the 'Settings' list in the System module opens the 'Printers: Inspect' window listing the Printers that have already been entered. To add a new Printer, simply enter its details on the first blank line and click [OK] to save and close. Click the close box to close without saving changes.



	Code	Print Server IP & Port		Hardw Port	Prnt. Settings
1	DEFAULT				
2	PSERVER	192.20.20.20	1200	LPT1	
3	OFFICE	192.20.20.22		1	
4	HEADED	192.20.20.24		LPT1	
5					
6					
7					
8					
9					
10					

If no Printers are listed, FirstContact will always use the Printer selected in the Control Panel (Windows) or Chooser (Macintosh). It is likely that this will be the case in single-user installations of FirstContact.

The Printer described in the first row should be the one that you wish to be used as a default printer: it will be used if no Printer has been specified for use with a particular document. This row should be blank (apart from the Code) as in the illustration, signifying that the Printer selected in the Control Panel (Windows) or Chooser (Macintosh) will be the default Printer.

For each available printer, the fields should be completed as outlined below—

Code Enter here an arbitrary name for the printer. When defining documents, this Code will be used to determine which printer will be used to print them out (see example below).

Print Server IP & Port

Enter here the full network IP address of the computer to which the printer is attached. If the printer is attached to a printer server, that server must be switched on and FirstContact must be running.

In the example illustrated, the Printer known to FirstContact as “PSERVER” is attached to a print server whose IP address is 192.20.20.20, while the “OFFICE” Printer is attached to a computer with the IP address of 192.20.20.22. The “DEFAULT” printer has a blank IP address, signifying that the printer is attached to your own computer: the first row of the Printers setting should always have a blank IP address.

The IP address of a particular computer can be obtained from the appropriate communications Control Panel.

The FirstContact print server facility is described below.

Hardw. Port Enter here the port of the computer named in the previous field to which the printer is attached. The following values can be used—

Blank Leaving the Port blank will cause the default printer of the specified computer to be used (i.e. that which has been selected in the Control Panel or Chooser). In this case, the built-in printer drivers will be used.

LPT1 - LPT5 To print directly to a parallel port of the Windows machine whose IP address appears in the Print Server field, enter the port number here (between LPT1 and LPT5). The built in Windows printer driver will be bypassed.

COM1 - COM5 To print directly to a serial port of the Windows machine whose IP address appears in the Print Server IP field, enter the port number here

(between COM1 and COM5). The built in Windows printer driver will be bypassed.

In some Windows NT4 installations, the serial port entry can be case sensitive. An entry of “com1” can sometimes be successful where “COM1” fails.

1 or **5** — To print directly to the printer port of the Macintosh whose IP address appears in the Print Server IP field, enter “1” or “5” here. Use “1” if the printer communicates at 9.6kbps (standard) or “5” if it communicates at 57kbps. The built in Macintosh printer driver will be bypassed.

F — This signifies that the machine whose IP address appears in the Print Server IP field is a Fax Server. In the third column of the grid, enter the port number of the FirstContact Fax Server. This should be the port specified in the Print Server Port field in the Program Mode register on the FirstContact Fax Server. You must have the Fax Value Pack if you want to use this feature: this is described in Chapter 9, ‘Value Packs’.

In all cases when a Port is indicated, FirstContact will only send variable data for a document through the port. All text items and formatting information will be lost, but the physical positioning on the page is preserved. It is thus assumed that pre-printed stationery is being used.

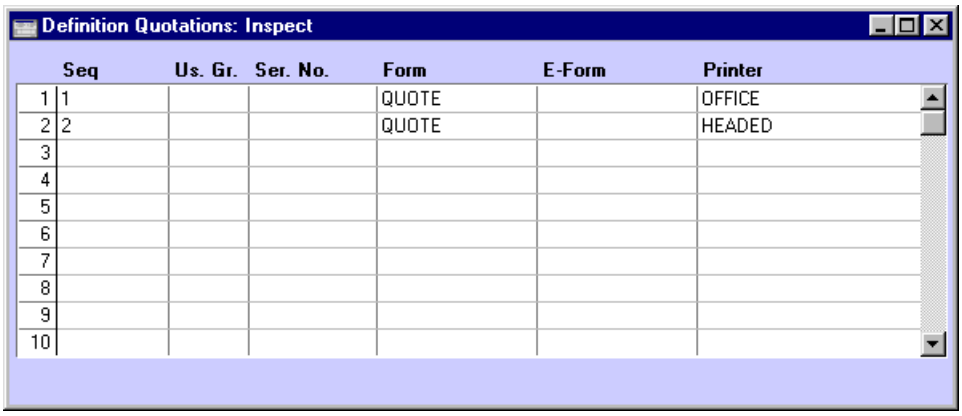
Note that if you have a printer installed (using a driver in the Control Panel or Chooser) but are printing directly to the serial/parallel port, the driver can interfere with the direct printing from FirstContact. If you have problems try to deinstall the printer drivers.

Defining when Printers are to be used

FirstContact’s documents are user-definable, a process which can include specifying which printer is to be used for a specific document. For example, you may wish to print a document to a specific printer that you know will always contain the correct stationery. The following example will use the Quotation Definition window to illustrate the process, but the procedure can be followed for any of FirstContact’s user-definable documents.

Having entered all available printers in the Printers setting as described above, move to the Contact module and select ‘Documents’ from the File menu. Highlight ‘Quotations’ in the ‘Documents’ list window and select ‘Define Document’ from the Special menu.

The following window opens—



In this example, which refers to the Printer setting illustrated on the previous page, Quotations will first be printed on the printer attached to the Macintosh with IP address 192.20.20.22 (this printer uses plain paper and produces a copy for the file). They will then be printed on the printer attached to the LPT1 port of the Windows computer with IP address 192.20.20.24. This contains headed paper. In both cases, the “QUOTE” Form is used. Note that because the same document is being printed twice, the Seq. field has been used to specify the order of printing. The ‘Paste Special’ function can be used from the Printer field to obtain a list of printers.

The “QUOTE” Form is designed using the Form register described later in this chapter.

If the Printer field is blank in any row in the ‘Define Document’ window, the first record in the Printers setting will be used.

Setting up a Print Server

In some larger installations it can be useful to set up a print server to look after the printing of documents. FirstContact can be configured to act as a print server. It periodically interrogates the data server for print jobs. When a user prints a document or report, it is held on the data server until the next interrogation by the print server. It is then taken from the data server by the print server. The data server is therefore made available for the next data processing task more quickly while the print server looks after communications with the printer.

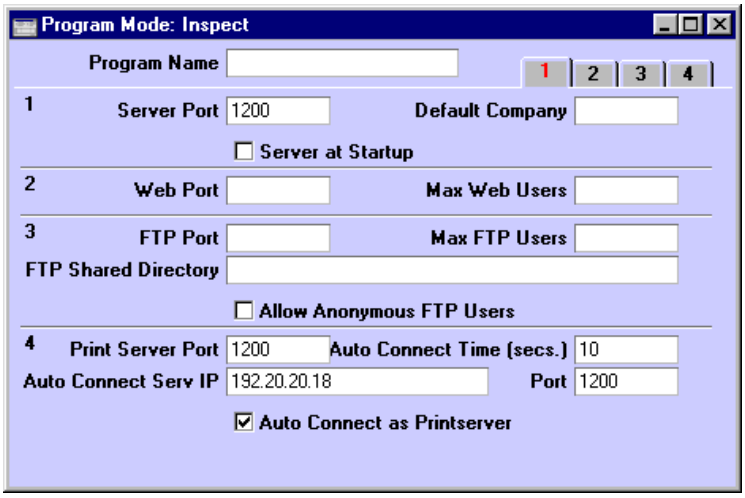
The copy of FirstContact that acts as the print server should be on its own dedicated machine (i.e. not on the same machine as the data server or any of the clients). To configure the FirstContact print server, follow these steps—

1. Create a new database on the machine that is to act as your dedicated print server following the instructions in the section entitled 'Creating a New Database' in the first chapter of this manual. Only one Company is necessary: specify a suitable name such as "FirstContact Print Server".

2. Using the Modules menu, change to the System module and open the System Usage setting. Ensure that the Server box is checked. This may result in you needing to apply for a new database key for the print server database.

3. Select 'Technics' from the Modules menu and click the [Prog Mode] button in the Master Control panel (or select 'Program Mode' from the Registers menu).

4. Complete cards 1 and 4 of this setting as follows—



Card 1

Server Port Enter an arbitrary four-digit code to identify the database. Even though the sole purpose of this database is to act as a print server and so no clients will be logging on, a Server Port number is still required to activate TCP/IP. The Port specified here must be unique (i.e. it must be different to the Server Port specified in the data server).

Card 4

Print Server Port Enter the Server Port specified in the Program Mode register on the data server. This is used to enable the print server to locate the correct copy of FirstContact on the server.

A consequence of this field is that if you have more than one data server machine (with different databases), you will need a separate print server for each one.

Auto Connect Serv IP

Specify here the IP address of the data server machine. This can be obtained from the TCP/IP control software on the server and is used to enable the print server to locate the correct data server on the network.

Auto Connect Time (secs)

The print server periodically interrogates the data server for print jobs. Specify here in seconds how often it should do this.

Port This field should be the same as the Print Server Port above.

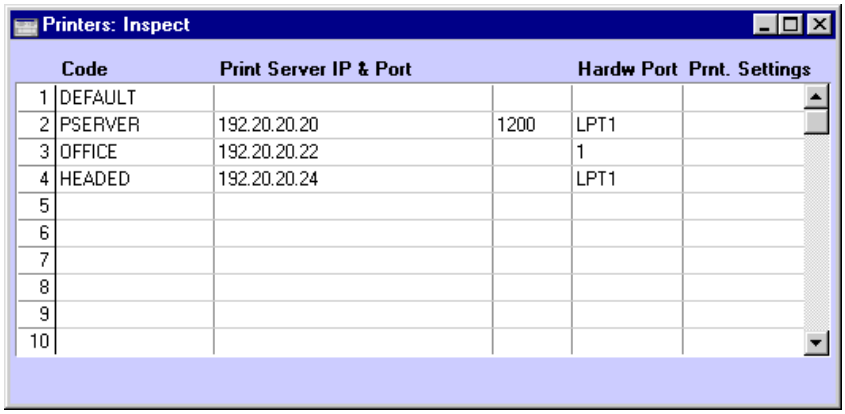
Auto Connect as Print Server

This box must be checked on the print server to ensure it checks the data server for print jobs every so often.

5. Once cards 1 and 4 of this register are complete, click the [OK] button in the Button Bar to save. If you have entered any Port numbers for the first time (or changed the ones that were already there), quit FirstContact and restart to allow the changes to take effect.

6. The final task is to select ‘Server’ from the Modules menu. The ‘Server Status’ screen appears. The print server can now be left alone.

7. Changing to the data server (or to one of the clients with access to the System module), the Printers setting should now be configured to make the print server available. If you choose to do this work on the server and it is running, ensure no other user is logged in, select ‘Quit, Remove Autoserver’ from the File menu and restart FirstContact. You will then be able to change the Printers setting.

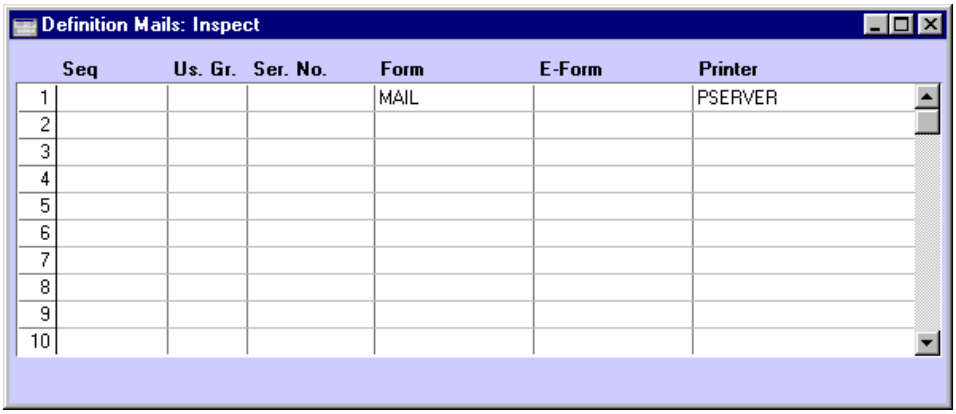


The first row of this setting should be blank (apart from the Code) as in the illustration, signifying that the Printer selected in the Control Panel (Windows) or Chooser (Macintosh) will be the default Printer.

In the illustration, the print server has been entered on the second row. The IP address of the print server machine has been entered in the Print Server IP field and the Port field shows the same number that was entered to the Print Server Port field in the Program Mode register on the print server. The Hardware Port is used to instruct the print server which printer is to be used. If several printers have been attached to the print server, separate rows should be entered in this setting with appropriate Hardware Ports to allow documents to be printed on the correct printer.

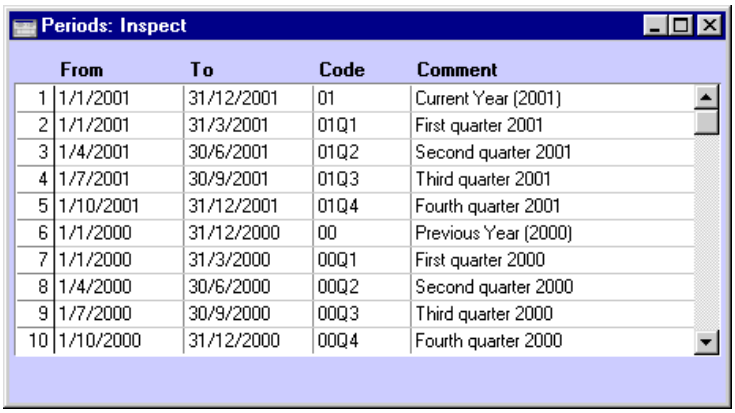
When the Printers setting is complete, save it by clicking the [OK] button in the Button Bar.

8. Finally, following the instructions in the ‘Defining when Printers are to be used’ section above, go to the ‘Define Document’ window for each document that is to be printed through the print server and specify the print server in the Printer field.



Reporting Periods

This setting allows you to name and define certain time periods. These should be the periods that you will commonly use when producing reports: using 'Paste Special' from the Period field of a report specification window will bring up a list of the Report Periods entered using this setting. For example, if you want to produce monthly reports you should define each month in the setting.



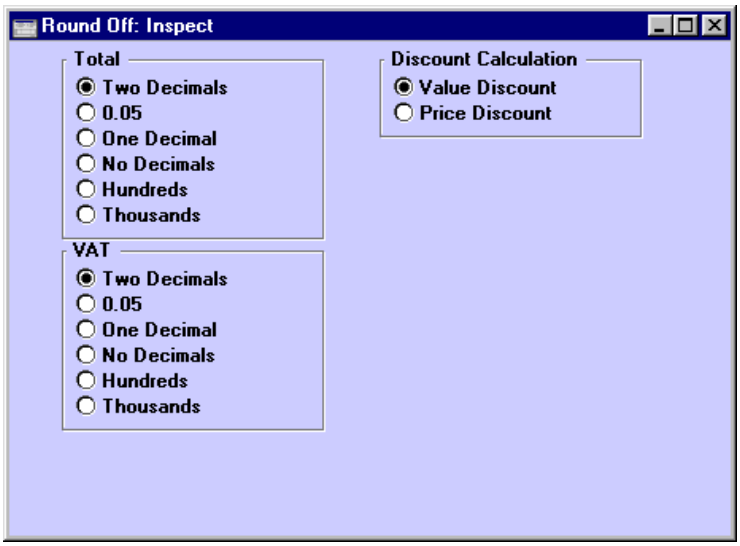
Once memorised, the Code can be used as a fast way of choosing a Report Period. For example, using the Report Periods illustrated above, type "01Q1" in the Period field of a report specification window when you want the report to cover the period "1/1/2001:31/3/2001".

To enter a new Reporting Period, simply click in the first blank line and enter details as appropriate. Click [OK] to save and close, or the close box to close without saving changes.

Note that the Reporting Period in the first row of this setting will be offered as a default wherever a Reporting Period is required. You might therefore like to change the first row from time to time so that a useful option is always offered as a default. To delete the old first row once it is no longer useful, click on the row number and press the Backspace key. To insert a new record on the first row, click on the row number and press the Return key.

Round Off

In this setting you control the way calculations are rounded off. The setting is used by Quotations.



Totals This set of options is used to set the rule for rounding off Total figures (i.e. including VAT) in Quotations.

VAT This set of options allows you to use a different rounding off rule for VAT. This rule applies to Quotations.

Discount Calculation

This set of options allows you to determine how discounts are calculated in Quotations. In certain circumstances (where there is a very small unit price and a large quantity), the two alternatives can produce different results due to rounding. If the Value Discount option is chosen, the discount will be calculated after the multiplication of the unit price and the quantity. If the Price Discount option is chosen, the discount will be

applied to the unit price before it is multiplied by the quantity.

For example, you issue a Quotation for 20,000 items priced at 0.05 with a 25% discount. With the Value Discount option selected, the calculated discount is 250—

20000 x 0.05 = 1000. 25% of 1000 = 250

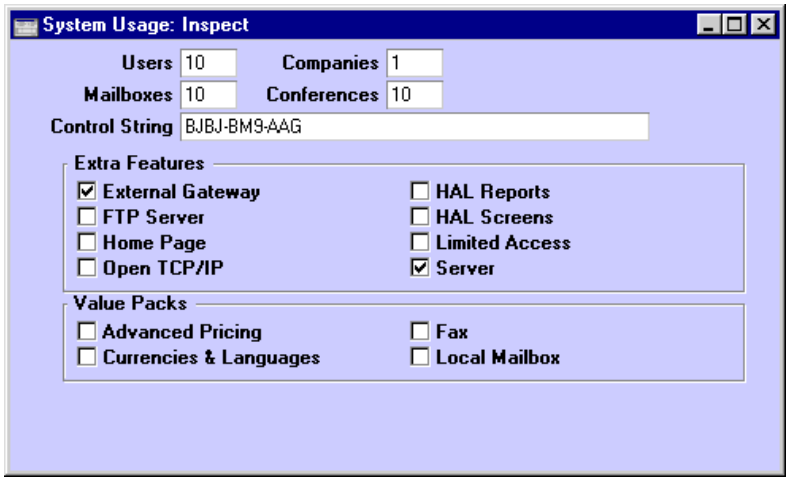
With the Price Discount option selected, the calculated discount is 200—

25% of 0.05 rounded to two decimal places is 0.01. 0.01 x 20000 is 200

Click [OK] to save any changes and close, or the close box to close without saving changes.

System Usage

This setting is used to register which modules have been purchased, how many Companies there are in your FirstContact database and how many users will have access to the system. Once this has been done, FirstContact will generate a Control Code, which should be quoted when it is necessary to obtain an Enabler Key. The setting is fully described in the sections entitled ‘Modules, Users and Companies’ and ‘The Database Key’ in the first chapter of this manual.



Value Packs

Value Packs allow you to add extra features to the basic FirstContact program. The Value Pack options can be selected at any time, but remember that doing so will mean that you will have to apply for a new Enabler key. You should also quit FirstContact and restart to allow the changes to take effect.

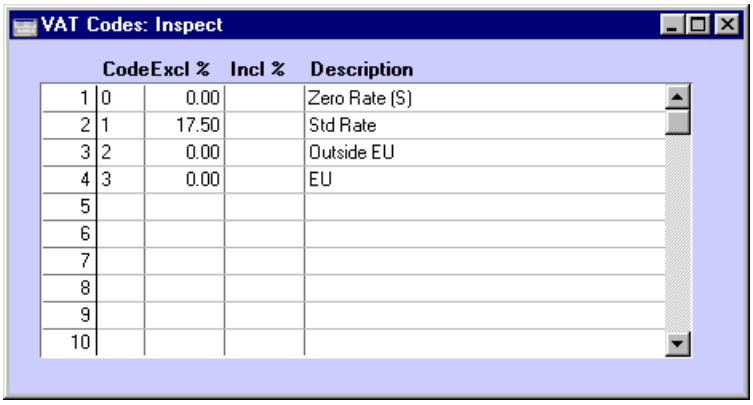
For full details of the extra features contained in the Value Packs, please refer to Chapter 9, 'Value Packs'.

VAT Codes

In order to comply with VAT regulations it is necessary to differentiate between domestic, EU and external trade. To solve this, FirstContact makes use of VAT Codes, whereby any number of VAT percentages can be defined.

VAT Codes can be assigned to Customers, Item Groups and Items. These allow FirstContact to calculate VAT correctly. The standard VAT Codes used in the UK are supplied with the program.

To edit the VAT Codes, double-click 'VAT Codes' in the 'Settings' list in the System module. The following window appears—



To edit a VAT Code, simply click in the field to be changed and overtype the existing entry. To add a new VAT Code record, scroll down to the first blank line. Click [OK] in the Button Bar to save changes and close the window, or [Cancel] to close the window without saving.

The information required for each VAT Code record is as follows—

Code Each VAT Code record should be identified by a unique Code.

Excl % Specify the percentage to be applied to a figure that excludes VAT in order to calculate the VAT amount.

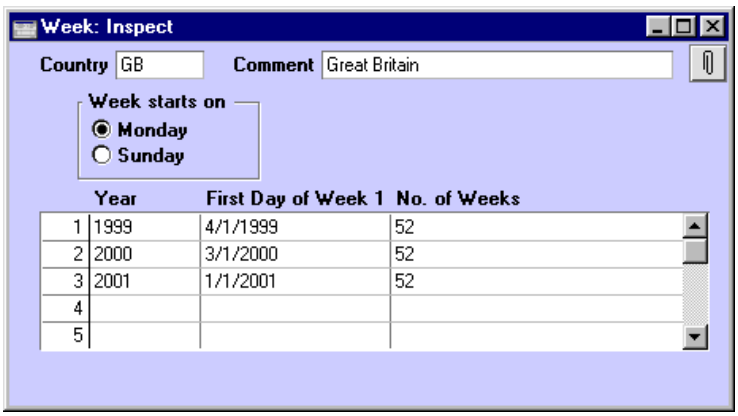
Incl % Specify the percentage to be applied to a figure that includes VAT in order to calculate the VAT amount.

Description The description entered here will appear in the 'Paste Special' list, so should be detailed enough to ensure the correct VAT Code is always chosen.

Weeks

This setting is used to define the Week Numbers that are shown in the six-monthly and monthly Calendar views. Week Numbers can vary from country to country and depending on when the year started. The six-monthly and monthly Calendar views are described in Chapter 7, 'Activities, To Do and Calendar'.

Click the [Settings] button in the Master Control panel or select 'Settings' from the File menu to open the 'Settings' list. Double-click 'Weeks' in the list. The 'Weeks: Browse' window lists the records that have already been entered: double-click one to modify it or click [New] to create a new record.



Complete the grid for each year of use as shown in the illustration (there is no need to have the years in order, but you should only enter each year once). The same code should be entered to the Country fields here and on card 2 of the Company Info setting. Click [OK] in the Button Bar to save, and then click the close box to save the record.

The Company Register

If your business is one where there are separate departments or subsidiary companies, these can be set up as separate entities in FirstContact using the Company register in the System module. Each department or subsidiary is termed a 'Company'. If you set up more than one Company in FirstContact, each will be completely separate: there will be no common information, although it is possible to copy from one to another using the export and import functions. Each Company within a database can be backed up separately or together.

On launching FirstContact for the first time, your first task will normally be to create a Company. Please refer to the first chapter of the manual for full details.

You must enter at least one Company as your first task in using FirstContact.

The number of Companies that you can create is restricted by the System Usage setting (in the System module). In a new database, this number will always be one. If you need more than one Company, it is advisable to change this limit and then to enter as many Companies as you need straight away, so that you only need apply for an Enabler key once. The Enabler key is dependent upon the number of Companies entered, so you will need to apply for a new one if you add a new Company later.

Entering Companies

This is the first task to be completed when creating a FirstContact database. The process is fully described in the first chapter of this manual.

If you have been working with a FirstContact database for some time and need to change or add to the information in the Company register, ensure you are in the System module and click the [Companies] button in the Master Control panel or select 'Companies' from the Registers menu. The 'Companies: Inspect' window appears: this is the same as that used to enter Companies when starting to use FirstContact. Please refer to the first chapter of this manual for details.

You can add new Companies at any time, but remember that doing so will mean that you will need to apply to your FirstContact representative for a new Enabler key.

For security reasons, FirstContact will shut down after any changes or additions have been made in the Company register. Restart the program to continue working.

The "Default.txt" file must be present when entering Companies.

Working with Companies

If you have set up more than one Company, you will need to inform FirstContact which one you would like to work with each time you start work. Whenever you launch FirstContact, the 'Select Company' list window will appear automatically—

Highlight the Company you wish to work with and click the [OK] button (or double-click on the Company in the list).

If you need to change Companies in the middle of a work session, there is no need to quit FirstContact and restart. Instead, go to the File menu and select 'Company'. The 'Select Company' list will appear, where you can choose a new Company to work with.

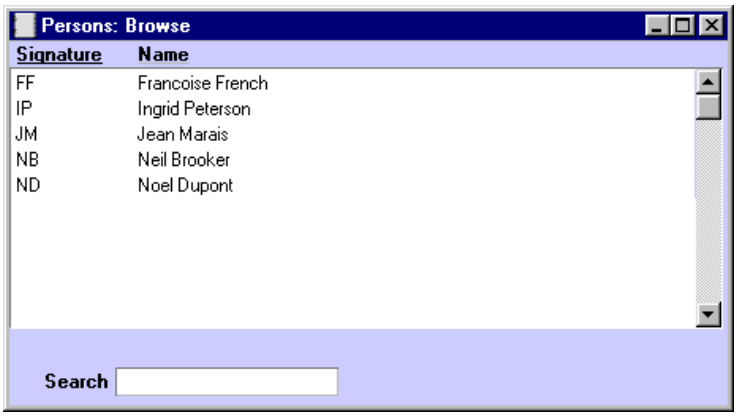
In a multi-user installation, choose any Company when starting the server. Users will then be able to log on to and work with any of the Companies stored within that database.

The Person Register

This register holds information about Persons, i.e. users, employees, sales persons etc. It can be used as part of your FirstContact security system: each Person can be given their own password. Once a single record has been entered to the register, starting FirstContact will require the entry of a Person's initials and, if appropriate, a password. However, if the Person register contains a blank record, the password and logging on window will not appear.

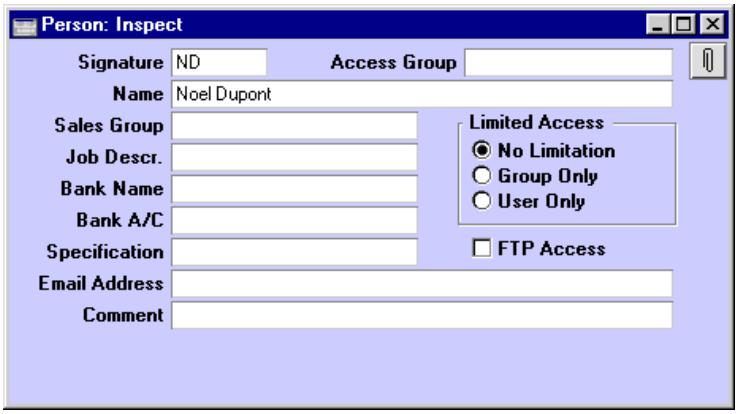
In the System module, select 'Persons' from the Registers menu, or click the [Persons] button in the Maser Control panel.

The 'Persons: Browse' window is opened, showing Persons that have already been entered.



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

The 'Person: New' window is opened, empty if you clicked [New] or with a copy of the copied Person. Complete the Person record as appropriate, then save it using the [OK] button and close the window by clicking the close box. Then, close the browse window using the close box again.



Signature

Enter the Person's initials to be used when logging on, or to identify the Person from elsewhere in FirstContact.

If there is more than one Company in the database, records in the Person register (as with all registers) are specific to the Company in which they are entered. However, if FirstContact's Mail facilities are being used, each Person's Mailbox will be open to all Companies in the database. This allows mail to be sent between Persons in different Companies. One implication of this is that all Persons across all Companies should have different initials. If there are two or more Persons in different Companies with the same initials, they will not be able to have separate Mailboxes

Name

The name of the Person.

FTP Access

If you are using the FirstContact FTP facility and wish to allow this Person access to your FTP server, check this box. They will use their initials as a Login ID, and you can allocate them a password using the 'Change Password' function on the Special menu of the 'Persons: Browse' window.

Access Group

Paste Special Access Group register, System module

Enter an Access Group, perhaps representing the department in which the Person works. By allocating an Access Group, you can restrict the Person's access to certain modules or parts of modules. Please refer to the section covering the Access Group register later in this chapter for full details.

Sales Group, Limited Access

Enter a Sales Group, perhaps representing the department in which the Person works. By allocating a Sales Group to a user, they will be able to see a reduced selection of records in certain browse windows and 'Paste Special' lists if the Limited Access feature is in use. This can be useful where a register contains many records, making it easier to find the correct one.

The browse windows and 'Paste Special' lists with this feature have three buttons in the bottom right-hand corner. These buttons can be used as follows—

Lists all records in the register.

Lists records belonging to members of the same Sales Group as the current user (i.e. records whose Sales Group field is the same as that of the current user).

Lists records belonging to the current user (i.e. records whose Person field contains the initials of the current user).

It is also possible to prevent a user from seeing all records in a register by restricting their view to their own records or to those of their Sales Group. This applies to registers whose browse windows have the three buttons shown above, and is done by choosing a Limited Access option for each Person. The options are—

No Limitation The Person will be able to see all the records in the register. They will be able to reduce the list so that it only shows records belonging to members of their Sales Group or their own records, using the buttons described above.

Group Only The Person will only be able to see those records belonging to members of their Sales Group. They will be able to reduce the list to show their own records only.

User Only The Person will only be able to see their own records.

The Limited Access module must be active if you want to choose the Group Only or User Only option for any

Person, or if you want to use the browse window buttons. To make this module active, check the Limited Access box in the System Usage setting in the System module. Remember that any changes made in this setting will require you to apply for a new Enabler key.

Job Descr. A short job description or title.

Bank Name The name of the employee's Bank.

Bank A/C The employee's bank account number.

Email Address The employee's email address. This is used as a return address if the employee uses FirstContact to send email.

Specification, Comment

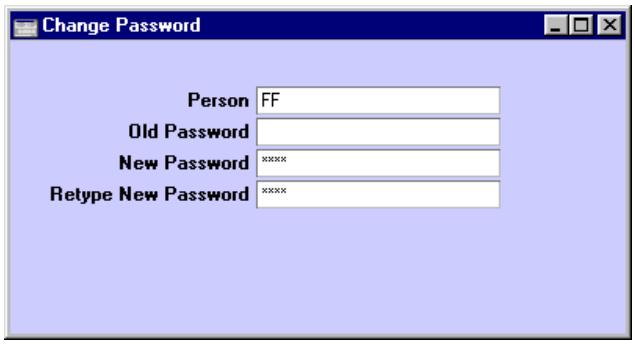
These fields can be used to record any comments about the Person.

As soon as a single Person has been entered in the Person register, the password dialogue will appear each time you start FirstContact.

Changing Passwords

Once a user or employee has been entered to the Person register, they will be able to log in to and use your FirstContact database. For security reasons, therefore, it is recommended that all Persons have their own passwords and that these are changed from time to time. If you are using the FirstContact FTP facility, the same passwords are also used to log in to your FTP server.

To set a password for a Person, highlight their name in the 'Persons: Browse' window and select 'Change Password' from the Special menu. The following window is opened—



Enter the old password if there is one and then type in the new one twice to ensure that it is correct. Click [OK] to close the window and save: use the close box if you do not want to save changes. The password is case-sensitive.

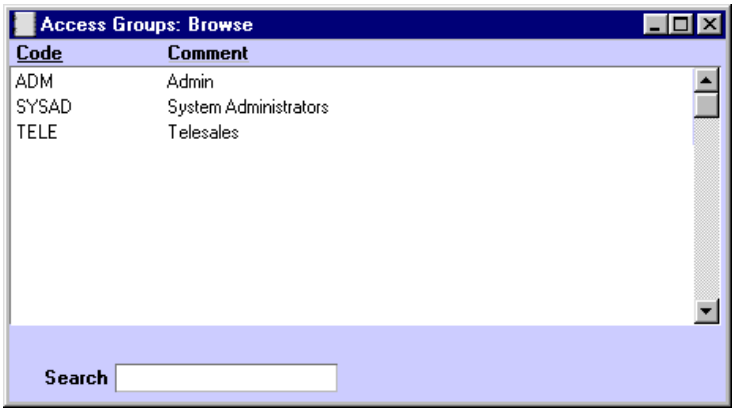
Each Person can also change their own password, even if they do not have access to the System module. Open the Master Control panel (or bring it to the front) and select ‘Change Password’ from the Special menu. Then, follow the instructions above.

The Access Group Register

Access Groups are a part of FirstContact's security system. You can define a number of Access Groups, each of which can be allowed access to one or more parts of the program. Each member of personnel, when entered to the Person register (described earlier in this chapter), can then be allocated to the relevant Access Group.

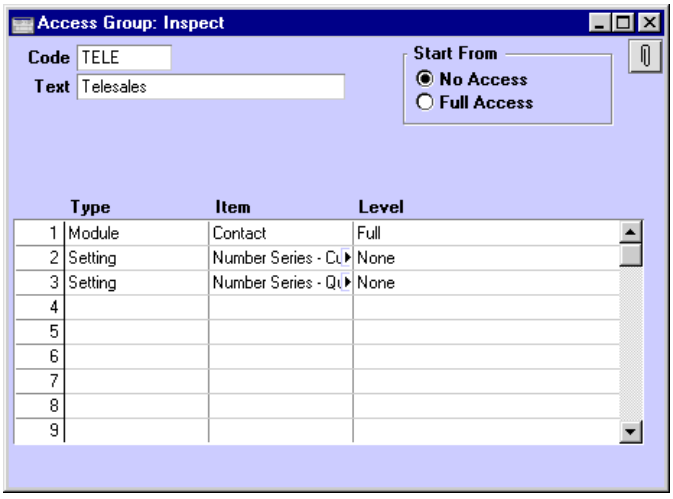
In the System module, select 'Access Groups' from the Registers menu, or click the [Access] button in the Master Control panel.

The 'Access Groups: Browse' window is opened, showing Access Groups that have already been entered.



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

The 'Access Group: New' window is opened, empty if you clicked [New] or with a copy of the copied Access Group. Complete the Access Group record as appropriate, then save it using the [OK] button and close the window by clicking the close box. Then, close the browse window using the close box again.



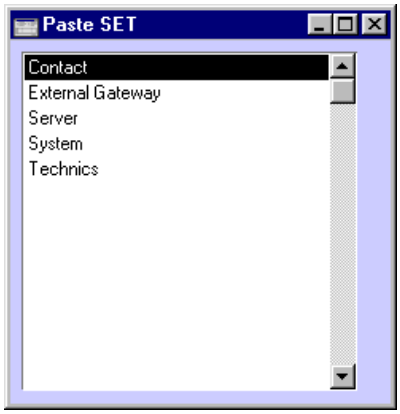
Members of the Access Group “TELE” in the above illustration will have access to one module - the Contact module. They will be allowed access to all functions within that module, except the Number Series - Customer Letters and Number Series - Quotations settings. In this manner, you can determine in great detail to which parts of FirstContact the members of each Access Group have access.

As you create Access Groups, give each a unique identifier in the Code field, and enter a description in the Text field.

The grid is used to determine the areas of FirstContact to which members of the Access Group will be given access, and the level of that access. You can allow or disallow access to any module or any component of a module (such as a particular register or setting).

First, specify the component in the Type field, using the ‘Paste Special’ function to show a full list of the components available—

The second field in the grid is now used to specify the individual item. For example, with “Modules” selected in the Type field, the ‘Paste Special’ list from the second field will contain a list of modules—



The list will show all FirstContact’s modules, including those that you may not have installed. Make sure you only select modules that are included in your particular installation of FirstContact.

With “Reports” selected in the Type field, the ‘Paste Special’ list will contain a list of reports to which, in some businesses, it might be necessary to restrict access.

The last column determines the access level of the Group. A further 'Paste Special' list displays the available options—

'Read', 'Read/New', 'Browse' and 'Browse/New' should only be applied to registers or settings, as follows—

Browse Allows access to the browse window only. Searches can be performed. Records cannot be entered or modified.

Browse/New Allows access to the browse window and the creation of new records. Existing records cannot be viewed, changed or copied.

Read Allows access to the browse window and the double-clicking of items so that they can be viewed in an inspect window. Records cannot be entered or modified.

This attribute can also be applied to reports, allowing them to be printed to screen but not to a printer or to a text file.

Read/New Allows access to the browse window and the double-clicking of items so that they can be viewed in an inspect window. New records can be created. Existing records cannot be modified, but they can be copied.

You can allocate access to the various parts of FirstContact using one of two methods, by specifying one of the two Start From alternatives. These can be described as follows—

No Access This option excludes members of the Access Group from all modules except those listed in the grid. You should use the first row(s) of the grid to specify the module(s) which members of the Access Group are to be allowed

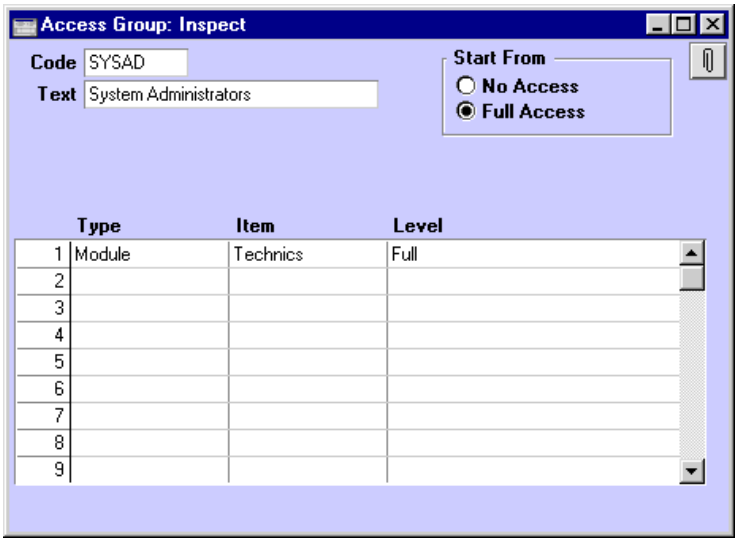
to use, selecting ‘Full’ in the third ‘Paste Special’ list. This will give full access to those modules (including to all registers, settings and reports). You can then exclude users from particular parts of those modules if necessary. No access will be given to modules that you have not listed.

Full Access If this option is used, members of the Access Group will be allowed full access everywhere except those areas listed in the grid.

Note that it is only possible to restrict access to Persons that have been assigned to an Access Group. Persons that have not been assigned to an Access Group will have full access to FirstContact.

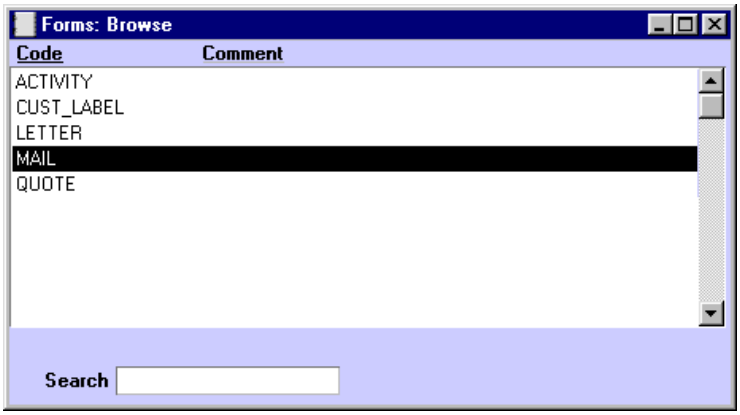
System Administrator

In multi-user systems, it is recommended that at least one member of staff acts as a system administrator, able to use the Technics module on a client machine when other users are logged in. To implement this, the Person record for that administrator should belong to an Access Group that Starts from Full Access and explicitly grants full access to the Technics module—

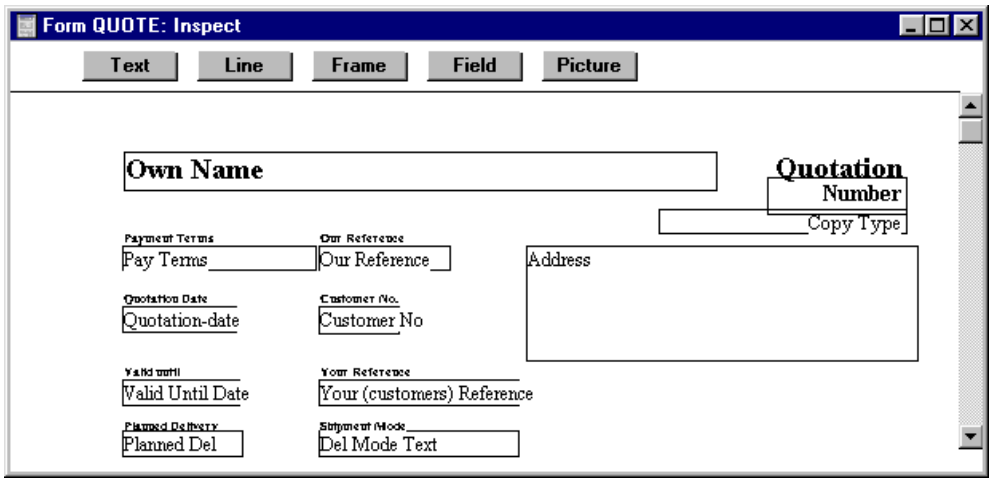


The Form Register

FirstContact has a built-in forms editor, which allows the design of all documents used in the program. In the System module, select ‘Forms’ from the Registers menu or click [Forms] in the Master Control panel to show a list of all available Forms.



Double-click on a document to open the editing window, or click [New] or [Copy] to create a new Form. When you have designed the Form, click [OK] in the Button Bar to save it in the normal way.



The ‘Form: Inspect’ window shows the selected Form or document. At the top of the window there are five buttons: [Text], [Line], [Frame], [Field] and

[Picture]. In the editing area, each printing object in the Form is shown either as a framed box, or as text. You can select an object by clicking on it with the mouse and then drag it to another place, re-size it etc. as in most drawing programs.

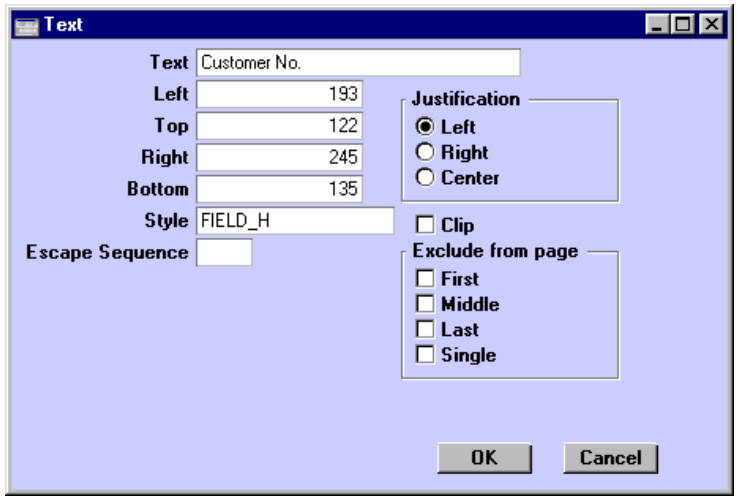
Editing Objects

To edit an object, double-click on it with the mouse. This will open a dialogue box, where you can perform certain editing functions. These are described for each object type below. For all object types the fields Left, Top, Right and Bottom indicate the location in pixels of the four sides of the object. The Justification options allow you to justify the text as you wish. Style refers to a Style setting, where you can set font, font size and font style.

Text Objects

To add a new text element to the Form, click the [Text] button and then draw the object where you want the text to appear.

When you release the mouse button, the following dialogue box will appear—



Text The text that is to be printed on the Form. 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.

Left, Top, Right, Bottom

Use these fields to specify the size and position of the text box that is to contain the text. When creating a new text box, the measurements of the box that you have just drawn will appear here.

Style **Paste Special** Style register, System module

Use this field to assign a font and font style to the text. Styles are defined using a separate register which is fully described later in this chapter. If no Style is entered here, the first record in the Style register will be used.

Escape Sequence The Escape Sequence is used when printing to particular printers: please refer to your local FirstContact representative for details of this feature.

Justification Use these options to specify where the text will appear inside the text box.

Exclude from page

Please refer to the 'Single- and Multi-Page Forms' section below for details about these options.

Click [OK] to close. The text field is visible on the screen, and you can move it around the Form with the mouse.

To edit a text object once it has been created, double-click it to open the 'Text' dialogue box.

Lines and Frames

Use these tool buttons to draw lines and frames on the Form. Click either button and then draw the object. When you release the mouse button, a dialogue box will appear where you can indicate the width in pixels of the line or frame, and the pages on which it is to be printed.

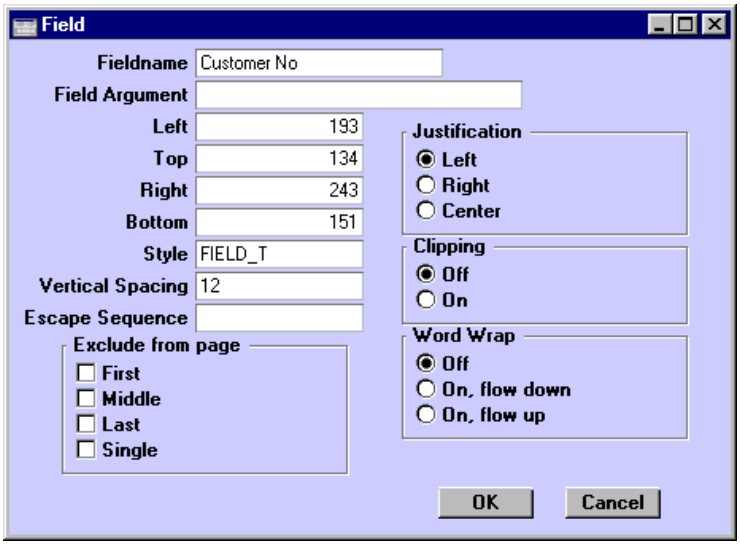
Fields

A field is an area on the Form where information from FirstContact's database is to be printed. The following example from a Quotation Form explains how—

Fields appear as framed boxes containing the field name, e.g. "Quotation-date". The box frames are for identification only: they will not be printed.

The [Frame] button can be used to add a printing frame if necessary. Above each field is a text object which identifies the information shown in the field. These would not be necessary if the Form is to be printed on pre-printed stationery.

To add a field, click the [Field] button, and mark the position of the field. A dialogue box opens—



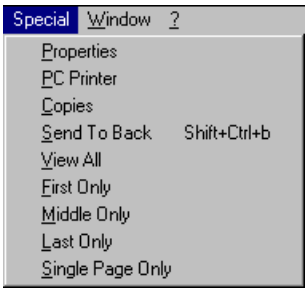
Enter the Field Name (use ‘Paste Special’ to see all available Field Names for the Document Type), and paste a style in the Style field. Some fields consist of more than one line. You can modify the spacing between lines (in pixels) with the Spacing field. Click [OK] to save.

Document Types are described in the section covering the ‘Properties’ Special menu function below.

Pictures

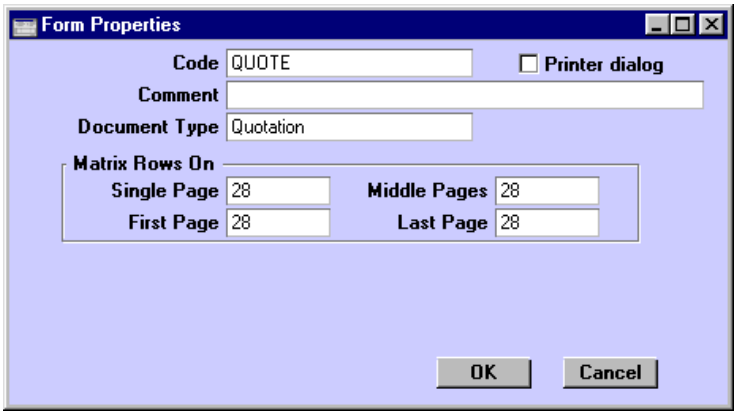
Use the [Picture] button to include a picture in your design. As with other tools, click the button and draw a frame for the picture on the Form. A dialogue box then appears. In the Picture Name field, enter the file name of the picture as it is on your hard disk. Use ‘Paste Special’ to ensure that the file name is spelt correctly. The picture must be stored in the same directory or folder as the FirstContact database and application. In the Windows environment, files of BMP format are supported. For Macintosh users, EPS and PICT formats are supported.

Special Menu



Properties

This menu command opens the ‘Form Properties’ dialogue box. Here you can record the basic specification for the Form currently being edited.



Code A unique code for the Form. If you have created a new Form by copying a template, you must enter a new Code here before you can save it.

Comment A description of the Form, e.g. Quotation.

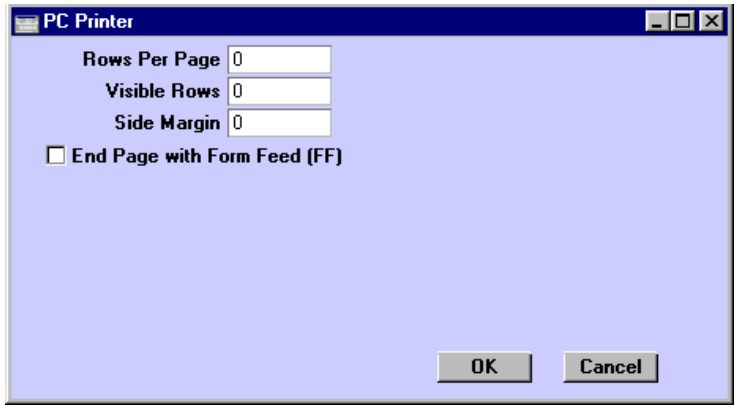
Matrix Rows On Please refer to the ‘Single- and Multi-Page Forms’ section below for details about these options.

Document Type Using ‘Paste Special’, enter one of the available Document Types into this field. When the time comes to add fields to the Form, only the fields available for that Document Type will be available in the ‘Paste Special’ list in the ‘Field’ dialogue box.

Printer Dialog Check this box to force a printer dialogue to be shown each time the Form is printed.

PC Printer

If a dot matrix printer is used, use this dialogue box to define the page size.



A dot matrix printer needs certain settings for printing on continuous stationery. If you are printing a document to pre-printed forms, you may need to define the number of rows in the page, the number of visible rows and the left margin for the forms used.

Copies

Use this function to define the number of copies to be printed each time the Form is used, their respective headings and the printer tray from which each copy is to be printed.

Send to Back

If you wish certain objects on the Form to appear behind other objects, select them and select this function.

View All, First Only, Middle Only, Last Only, Single Page Only

These functions are described in the next section, ‘Single- and Multi-Page Forms’.

Single- and Multi-Page Forms

When designing Forms, you should consider what is to happen when the printing of a document requires more than one page. Two options are available—

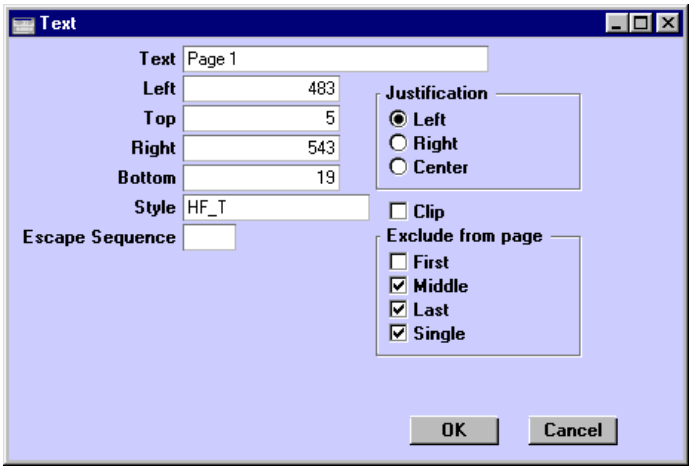
1. The “simple” option, where the same page design is used for each page.

2. The “multi-page” option allows the use of up to four page designs, 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.

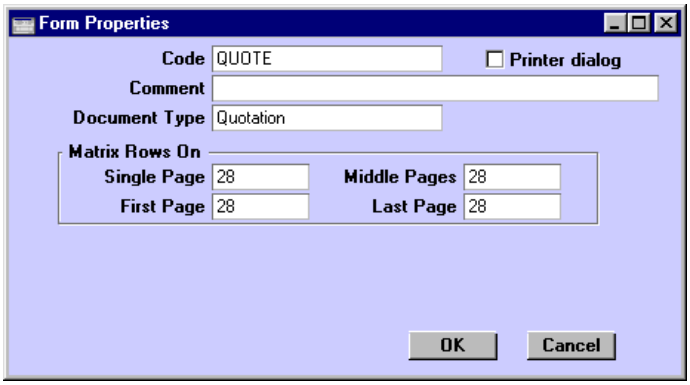
Usually, the First and Single page designs will be the same.

When an object of any kind (i.e. text, line, frame or field) is added to the Form design, the Exclude From Page check boxes can be used to specify the pages on which the object is to be printed. If none of these boxes is checked, the object will be printed on every page. This will be the case when using the “simple” option. If you want the object to be printed on certain pages only, check one or more of the boxes. For example, if the object is to be printed on all pages except the first, check the First box. If it is only to be printed on the first page, check all boxes except the First box (i.e. it will be excluded from all pages except the first). The Text object in the illustration below will be printed on the first page only—



To help with the design process, you can choose to display the objects from a particular page. To do this, select ‘First Only’, ‘Middle Only’, ‘Last Only’ or ‘Single Page Only’ as appropriate from the Special menu. For example, select ‘First Only’ to view the objects that are to be printed on the first page (i.e. those whose First box has not been checked). Select ‘View All’ to see all objects, irrespective of the page on which they are to be printed.

The number of pages printed will vary from record to record, depending on the number of rows that the record has. A Quotation with one Item will be printed on a single page (i.e. using those objects whose Single box is not checked). A Quotation with 100 Items (i.e. 100 rows) will be printed over several pages. You should specify the maximum number of rows that can be printed on each page by selecting ‘Properties’ from the Special menu. This opens the ‘Form Properties’ window, which has four fields under the overall heading of Matrix Rows On—



In the case of the “simple” option, the same number should be entered to each of these four fields. Otherwise, enter different numbers as appropriate. For example, in a Quotation Form, First and Single are set to 5, Middle to 6 and Last to 7. Quotations will be printed as follows, depending on the number of rows—

Quotation rows	Pages	Type of Page
Up to 5	1	Single
5-12	2	First and Last
13-19	3	First, Middle and Last
19-25	4	First, 2 x Middle, Last

Printing Forms

Once a Form has been designed, you should inform FirstContact when it is to be printed. This is done by attaching the Form to an item in the ‘Documents’

list in the appropriate module. This is only necessary if you have given your Form a new Form Code using the 'Properties' Special menu function.

For example, when printing a Quotation, FirstContact, by default, will use a Form with the Form Code of "QUOTE". A template Form with this Code is supplied with FirstContact. If you have used this template as a basis for designing your own quotation form and haven't changed the Form Code, the new design will be used automatically. However, if you have changed the Form Code to, for example, "QUOTE1", you should inform FirstContact that this is now the Form to be used for printing Quotations.

To do this, follow these steps—

1. Select the Contact module using the Modules menu.
2. Select 'Documents' from the File menu. The 'Documents' list window is opened showing a list of available documents. Highlight 'Quotations'.
3. Select 'Define Document' from the Special menu.
4. In the first row, "QUOTE" will be shown in the Form field. Change this to the Form Code of your new quotation Form ("QUOTE1" in the example). Use the 'Paste Special' feature to see the available forms in your Forms register and to ensure the spelling is correct.
5. Click [OK] to save the Quotation definition. From now on, whenever Quotations are printed, the "QUOTE1" Form will be used.

'Define Document' (steps 3 and 4 above) can also be used to specify that different quotation Forms are used depending on the Access Group of the user or the number sequence in which the Quotation Number falls.

The 'Define Document' function is available for many of the documents printed by FirstContact, allowing a high level of flexibility in the production of printed output from FirstContact. Further details are given in the chapters of this manual covering the individual modules.

Related Items

The Printers setting in the System module is used to inform FirstContact of the different printers available in your network. Once this has been done, the 'Define Document' function can be used to specify which printer is to be used when printing a particular Form.

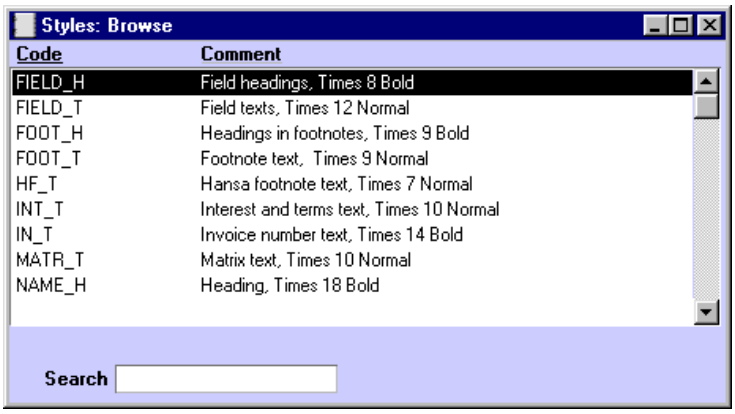
The Style register, also in the System module, is used to define the various type styles, fonts, etc. available for use when designing Forms.

The Style Register

In this register, you can define the different font Styles to be used in the Fields and Text objects in your Forms, ensuring a consistency of appearance.

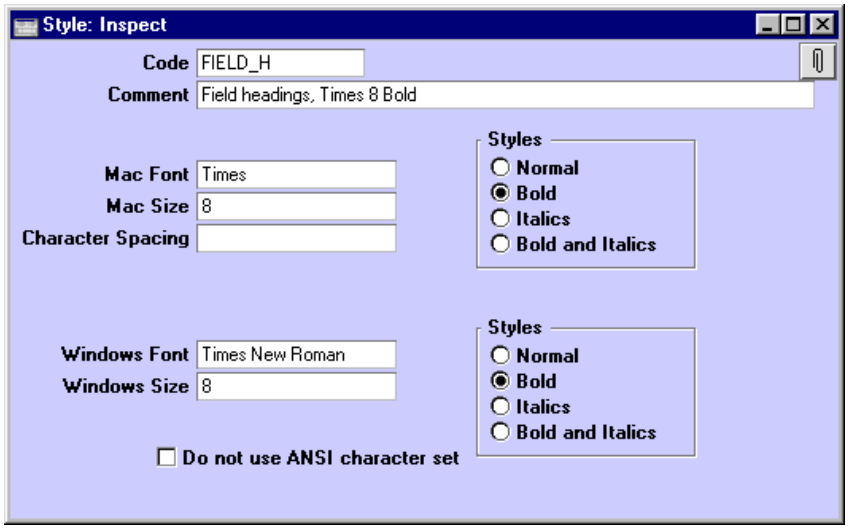
In the System module, select ‘Styles’ from the Registers menu, or click the [Styles] button in the Master Control panel.

The ‘Styles: Browse’ window is opened, showing Styles that have already been entered.



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

The ‘Style: New’ window is opened, empty if you clicked [New] or with a copy of the copied Style. Complete the Style record as appropriate, then save it using the [OK] button and close the window by clicking the close box. Then, close the browse window using the close box again.



Code The code for the Style.

Comment Any description.

Mac/Windows Font

Paste Special Fonts available on your computer

The name of the font file, as it appears in the Windows directory or the System folder.

Mac/Windows Size

The font size in points.

Styles Select one of the available style types.

Character Spacing

This is used when printing bank giro forms, where a fixed character spacing is required. Specify here the spacing in pixels from the start of one character to the start of the next. Usually this will be six pixels or less.

Styles with a Character Spacing can only be used in Fields and Text objects with a left or right justification. The Character Spacing will have no effect in Fields and Text objects with a centre justification.

This feature is Macintosh only.

Do not use ANSI character set

Use this option if the Style is to use a non-standard character set (for example, that used in barcodes).

If FirstContact is being used on a mixed network with both Windows and Macintosh clients, it is advisable to specify both a Windows Font and a Macintosh Font for each Style.

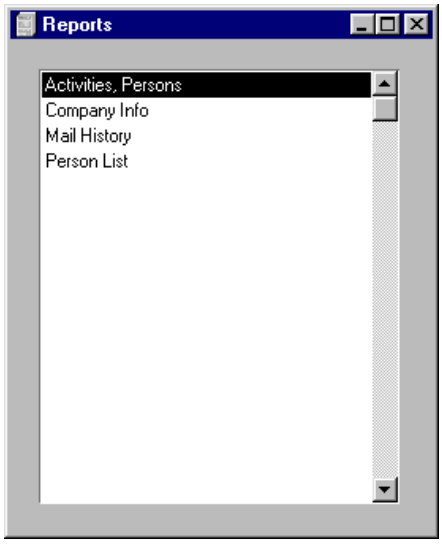
Documents

A single document can be printed from the System module: please refer to Chapter 6, ‘Mail’, for a full description.

Reports

As with all modules, to print a report in the System 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, highlight the appropriate item in the list.

The following reports are available in the System module—



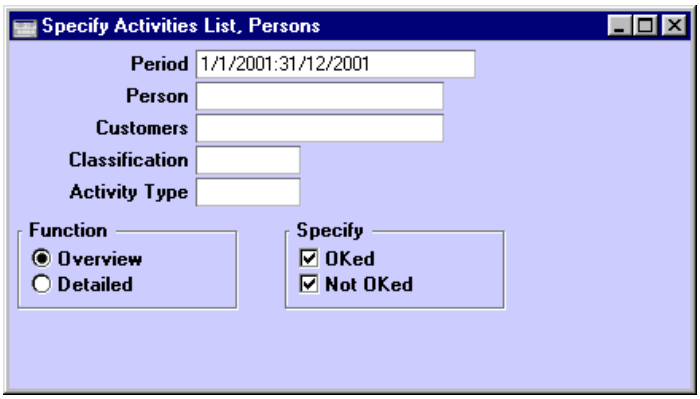
Using the Special menu, determine the print destination of the report (the default is to print to screen). You can initially print to screen and subsequently send the report to a printer by clicking the Printer icon. Once the print destination has been chosen, click [OK]. A specification window will then appear, where you can decide what is to be included in the report. Click [OK] again to print the report.

With a report in the active window, the ‘Recalculate’ command on the Special menu can be used to update the report after making alterations to background data.

Activities, Persons

This report shows the contents of the Activity register from the point of view of the Persons who entered or carried out the Activities (i.e. it is sorted by Person).

When printed to screen, the Activities, Persons report has FirstContact's Drill-down feature. Double-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. To produce a report for a particular day, simply enter the date once. FirstContact 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 limit the selection to Activities recorded, scheduled or carried out by this person.

Customers — **Paste Special** — Customer register

Range Reporting — Alpha

Limit the selection to Activities recorded or scheduled for a single Customer (or a range of Customers).

Classification — **Paste Special** — Customer Classifications setting, Contact module

Enter a Classification Code to limit the report to Activities featuring Customers with a particular Classification.

Activity Type — **Paste Special** — Activity Types setting, Contact module

Enter an Activity Type to limit the report to Activities of that Type.

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, Customer, Contact and Comment.

Detailed

In addition to the information shown in the Overview, this option shows all details entered in the grid area of the Activity screen.

Specify

Use these options to determine whether the report is to contain only approved Activities, unapproved Activities or both. To produce a 'To Do' list, show unapproved Activities only.

Company Info

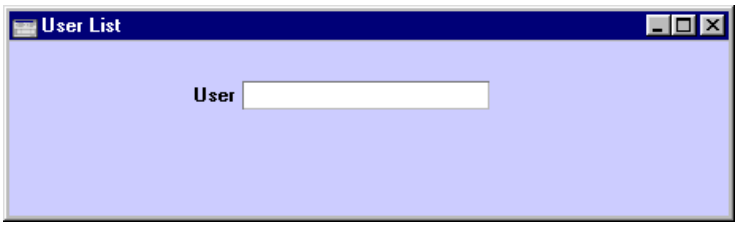
This report is effectively a print-out of the Company Info setting. It also shows licensing information such as the Control String and Control Code. It is sometimes necessary to print this report when applying to your local FirstContact representative for an Enabler key.

Mail History

Please refer to Chapter 6, 'Mail', for a description of this report.

Person List

This report lists the records in the Person register. As well as each Person's initials and name, the Sales Group, Job Description, Bank Account details and Email Address are shown.



User	**Paste Special**	Person register, System module
	Range Reporting	Alpha

Enter a Person's initials (or a range or initials) to report on that member of personnel only.

Imports

The ‘Imports’ function provides for the importing of data from tab-delimited text files exported by other FirstContact databases or Companies, or from other applications such as spreadsheets. It also imports the encrypted back-up files created by the ‘Company Text Backup’ and ‘Database Text Backup’ Export functions. The function is selected using the ‘Imports’ item on the File menu.

On selecting the ‘Imports’ function from the File menu, an ‘Imports’ list window appears. There are two import options in the System module: double-click one to start the import process. An ‘Open File’ dialogue box will appear, asking you to locate the file to be imported. Click [Open] and the import will begin.

Automatic

The ‘Automatic’ import can be used to import from text and encrypted files created by any of FirstContact’s export functions. It determines from information contained in the first line of such files what the file contains and thus in which register the information is to be saved.

The function will therefore be used in the event that it is necessary to restore from a back-up. This process is described in the next section of this chapter. It will also be used to import information to a Company holding the consolidated records of several subsidiaries.

A further use will be to import set-up information such as Customers and Items, thus ensuring that the task of accurately entering this information need only be undertaken once.

Finally, the function can also be used to import data exported from other systems, after appropriate formatting. For further details, please contact your local FirstContact representative.

Automatic, manual file search

This import is similar to the 'Automatic' import described above in that it can be used to import from files created by any of FirstContact's export functions. The only differences are—

1. It allows you to import files from anywhere on your hard disk or on your network, while files imported by the 'Automatic' function have to be located in the "Backup" or "Setup" folders in the same folder as the FirstContact application.

2. It allows you to import files with any filename. The 'Automatic' function is restricted to files named using the DOS naming convention (i.e. a maximum of eight characters followed by a three character extension).

3. Comments inserted in the back-up files are not visible when using the 'Automatic, manual file search' function, so be certain that you are selecting the correct file to be imported. These comments can be seen when using the 'Automatic' import.

To use the function to restore from a back-up, follow the procedure below. To import data exported from other systems, after appropriate formatting or from other Companies in your FirstContact database, follow the procedure as described below, but omit steps 1 and 2. If you have more than one Company, ensure you are in the correct one before importing.

1. Move the old database (named "1Contact.HDB") to another folder/directory or to a diskette, to avoid mixing things up. Rename it so that you know what it contains.

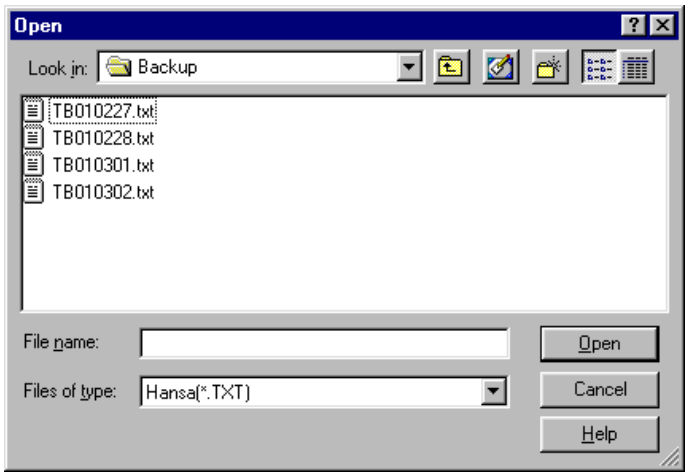
2. Delete the database file "1Contact.HDB" from the folder or directory with your FirstContact application, but make sure that the "DBDef.txt" and "Default.txt" files are present in that folder. Double-clicking the FirstContact application now will force it to create a new database.

! ***It is important to restore to a new, empty database, to avoid mixing the restored data with the old, damaged database.***

3. In the System module, choose 'Imports' from the File menu.

4. Select 'Automatic, manual file search' and press the [OK] button (or double-click on 'Automatic, manual file search').

FirstContact opens a dialogue box with a list of the files in the current folder of the current volume. To find the back-up file, scroll through the list or select another folder or volume in the normal way.



5. Once you have found the file you want to import (the back-up to which you wish to revert) and click [OK] (or double-click on the name of the file).

6. A message window informs you about the progress of the import.

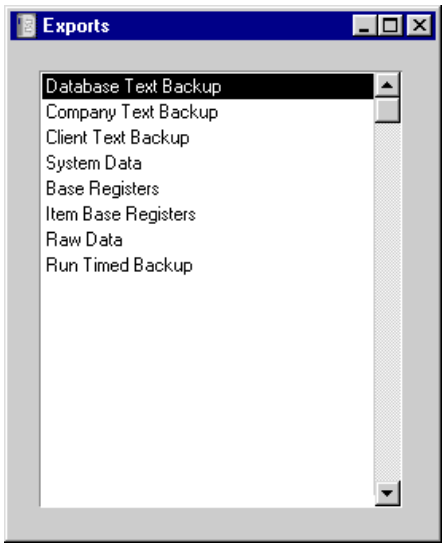
7. When the import has finished, FirstContact will shut down for reasons of security if the imported file contains any Person register records. Restart the program and you will then be ready to continue working. If you imported the file to a brand new database (i.e. you were restoring from a back-up file), you will need to re-enter your database key to the Enabler setting.

! ***Copy the old database to another folder/directory or remove it, to avoid mixing things up.***

Exports

You can export several different types of data from FirstContact. The exported data can be used by external programs such as spreadsheets, word processors etc. Apart from those created by the Back-up functions, all exports are output in simple text format, with fields separated by tabs.

To produce an export file, select the 'Exports' item on the File menu or use the Ctrl-E (Windows) or ⌘-E (Macintosh) keyboard shortcut. The window illustrated below appears. This lists the Exports which can be produced from the System module. Double-click the appropriate item in the list. A specification window will then appear, where you can decide the contents of the exported file. Click [OK] again to name the file and to determine where it is to be saved.



Company Text Backup, Database Text Backup

These functions provide an effective way to back up your data. They copy all data from the program to a separate file. It is also possible to copy or duplicate the database file as it appears on your hard disk, but FirstContact's method has two advantages—

- The back-up file takes up very little space. It is not unusual that a whole year's records will fit on one diskette.
- The back-up file is independent of the program version. IT CAN ALWAYS BE USED, whereas a new version of the FirstContact program (for reasons of internal updates in the program) may have difficulties in reading old database files.

! ***Use FirstContact's built-in back-up feature to guarantee a successful restoration.***

This is how you back up your data—

1. In the System module, select 'Exports' from the File menu or use the Ctrl-E (Windows) or ⌘-E (Macintosh) keyboard shortcut. The 'Exports' list is shown.
2. Select 'Company Text Back-up' (if you wish to back up the data in the database relating to the single Company currently selected) or 'Database Text Back-up' (if you wish to back up the whole database) from the 'Exports' window and click [OK].

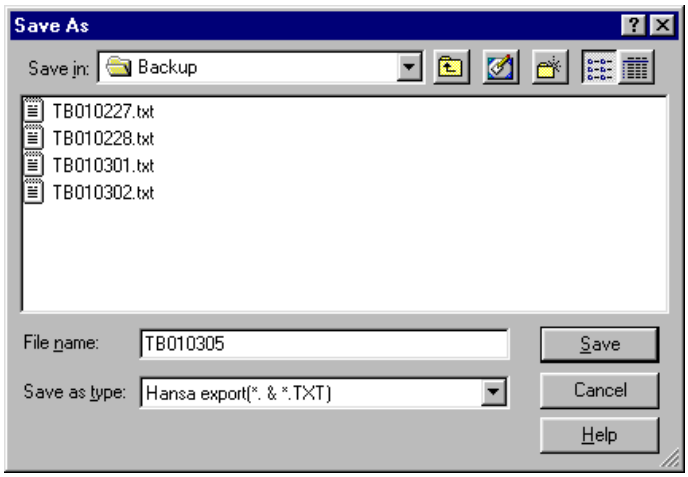
   Usually the 'Database Text Back-up' option should be used. Some registers and settings (e.g. the System Usage setting, Mailboxes and Conferences) are stored at database level, not Company level. These will not be exported by the 'Company Text Back-up' option, even if your database only contains a single Company. The 'Company Text Back-up' option is intended for use in the situation where you need to move all the information relating to a specific Company from one database to another.
3. The "Specify Text Backup" window appears where you can describe the back-up file using up to 40 characters. This description will be shown in the list of importable files shown by the 'Imports' function. Click [OK] to proceed.
4. FirstContact opens a dialogue where you can name and place the export file. Enter the name of the file in the filename area and locate it in the appropriate directory in the usual way.

!

Do NOT send the back-up directly to a diskette! ALWAYS send it to the hard disk first, and then copy the back-up file to a diskette.

The name of the back-up should include the date the back-up was made (e.g. TC0711 for Training Company and date), but remember that you can use a maximum of eight characters if you are using Windows NT version 3 and/or if you are intending to restore from the back-up file using the 'Automatic' function (the 'Automatic, manual file search' function can import files with names of any length). Then, click [OK].

It is recommended that the back-up file be stored in a folder or directory named "Backup" which should be in the same folder or directory as the FirstContact application. All back-up files in this folder will be shown in a list of importable files if it becomes necessary to restore from a back-up.



4. A message window informs you about the progress of the export.

5. When the export is finished, you are brought back to the 'Exports' list. Close it using the close box.

! ***Make a rule to take a safety back-up EVERY DAY! Your database can be damaged, through hardware failures, power cuts and other reasons. A back-up file is a safety guarantee against loss of data and loss of work, should anything go wrong.***

Note that, for reasons of security and unlike the other export files produced by FirstContact's Export functions, the files created by the 'Company Text Backup' and 'Database Text Backup' functions are encrypted files, not text files.

Restoring from a Back-up

To restore from a back-up, you must first create a new database. Then import the back-up file using the 'Imports' function on the File menu in the System module.

Restoration from a safety back-up is a non-destructive process, i.e. the back-up file is not affected by the reading process. This means that you can use the same back-up file more than once.

Restoring from a back-up is done in the following way—

1. Move the old database (named "1Contact.HDB") to another folder/directory or to a diskette, to avoid mixing things up. Rename it so that you know what it contains.

2. Delete the database file "1Contact.HDB" from the folder or directory with your FirstContact application, but make sure that the "DBDef.txt" and "Default.txt" files are present in that folder. Double-clicking the FirstContact application now will force it to create a new database.

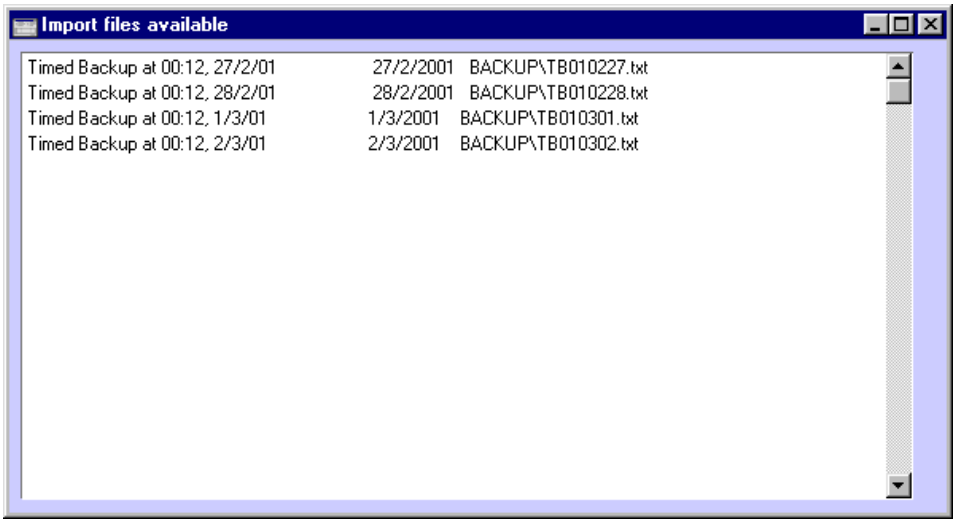
! ***It is important to restore to a new, empty database, to avoid mixing the restored data with the old, damaged database.***

3. In the System module, choose 'Imports' from the File menu. The 'Imports' window is shown.

4. Select 'Automatic' and press the [OK] button (or double-click on 'Automatic').

FirstContact opens a list of back-up files. To be included in this list, a back-up file can be stored in the “Backup” or “Setup” folder or directory, which should be in the same folder or directory as the FirstContact application.

In the list, the filename of each back-up file is shown together with the date it was saved and any comment added when it was created (see step 3 in the previous section).



5. Highlight the file you want to import (the back-up to which you wish to revert) and click [OK] (or double-click on the name of the file).

6. A message window informs you about the progress of the import.

7. When the import has finished, FirstContact will shut down for reasons of security if the imported file contains any Person register records. Restart the program and you will then be ready to continue working. If you imported the file to a brand new database (i.e. you were restoring from a back-up file), you will need to re-enter your database key to the Enabler setting.

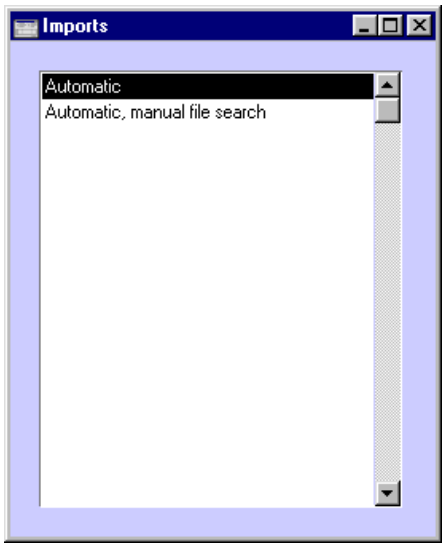
! ***Copy the old database to another folder/directory or remove it, to avoid mixing things up.***

If the Restoration Appears to Fail

There are certain circumstances in which FirstContact will show files in the list of available back-up files, but not be able to import them successfully. This will occur on both Macintosh and Windows machines if the filename does not comply with the DOS naming convention (i.e. a maximum of eight characters followed by a three character extension). If the name of your back-up file does not comply with this convention (or it is not shown in the list of available files because it is not stored in the “Backup” or “Setup” folder or directory), continue with these steps—

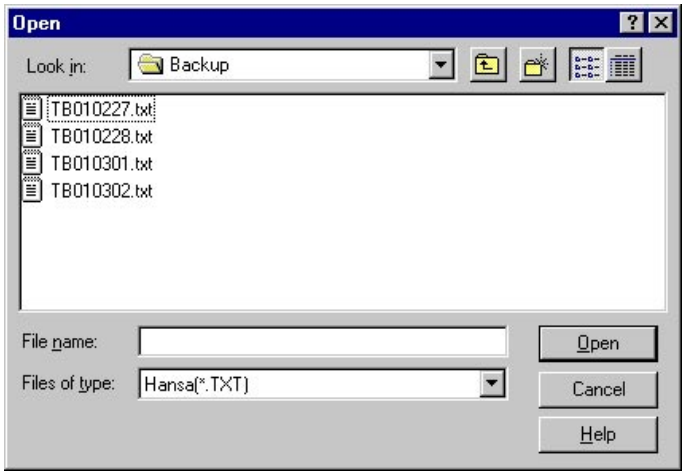
1. If it is still open, close the list of available import files using the close box.

2. In the System module, choose ‘Imports’ from the File menu. The ‘Imports’ window is shown—



3. Select ‘Automatic, manual file search’ and press the [OK] button (or double-click on ‘Automatic, manual file search’).

   FirstContact opens a dialogue box with a list of the files in the current folder of the current volume. To find the back-up file, scroll through the list or select another folder or volume in the normal way.



4. Once you have found the file you want to import (the back-up to which you wish to revert) and click [OK] (or double-click on the name of the file).

   A message window informs you about the progress of the import.

5. When the import has finished, FirstContact will then close for reasons of security if the back-up file contains at least one record in the Person register. Restart the program and type your database key in to the Enabler setting: you will then be ready to continue working.

Client Text Backup

This function is used on client machines only for backing up information that is stored locally. As very little is stored locally (e.g. Companies), the resulting back-up file will usually be very small.

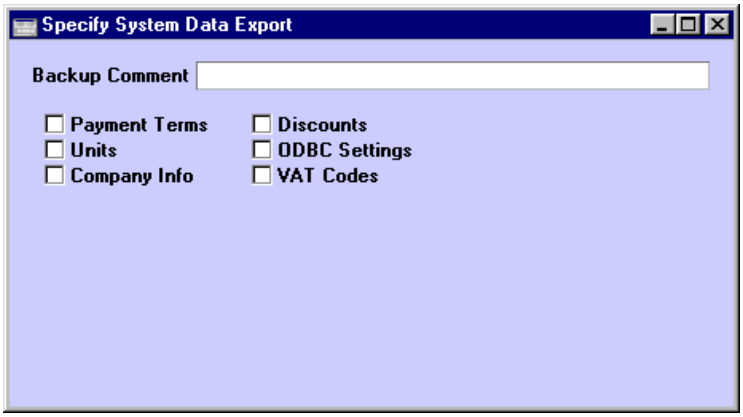
In use, it operates in a similar fashion to the ‘Company’ and ‘Database Text Backup’ functions described in the previous section, and, like them, creates an encrypted file, not a text file.

System Data

This function can be used to export basic information from a database. This is a practical tool when you want to create a new Company which will use some of the same basic information as your existing ones. You can save much work by simply copying repeated data and afterwards changing whatever is different between the two Companies.

The System Data export is saved as an ordinary text file and is imported to the new Company using the ‘Automatic’ or ‘Automatic, manual file search’ Import functions in the System module (described earlier in this chapter).

Select ‘Exports’ from the File menu in the System module and double-click ‘System Data’ in the ‘Exports’ list. The ‘Specify System Data Export’ window is opened—



Check the boxes to determine the data to be exported. Use the Backup Comment to describe the back-up file (up to 40 characters are permitted). This description will be shown in the list of importable files shown by the ‘Imports’ function. Click [OK] to proceed. FirstContact will open a dialogue box where you can name the export file and specify where it is to be saved.

Enter a name for the file and click [Save] or press the Enter key.

A message window informs you about the progress of the export. The process can be interrupted at any time by pressing Esc (Windows) or ⌘-Period (Macintosh).

When the export has finished, you may close the ‘Exports’ window with the close box.

Base Registers

In a similar manner to the ‘System Data’ export described above, this function allows you to export the records from any base register.

Select one or more options and use the Backup Comment to describe the back-up file (up to 40 characters are permitted). This description will be shown in the list of importable files shown by the ‘Imports’ function. Click [OK] to proceed. If you have selected a single register, you may export a selection of records in that register by specifying a code range in the Code field. Then, give a name and destination to the file and click [Save].

Files created by this export can be imported to other FirstContact Companies or databases using the ‘Automatic’ or ‘Automatic, manual file search’ import functions in the System module.

Item Base Registers

In a similar manner to the ‘System Data’ export described above, this function allows you to export the records from any base register related to Items.

Some of the registers in the ‘Specify Item Base Register Export’ window may not be used in your version of FirstContact. An attempt to export information from registers not present will result in an empty file.

Select one or more options and use the Backup Comment to describe the back-up file (up to 40 characters are permitted). This description will be shown in the list of importable files shown by the 'Imports' function. Click [OK] to proceed. If you have selected a single register, you may export a selection of records in that register by specifying a code range in the Code field. Then, give a name and destination to the file and click [Save].

Files created by this export can be imported to other FirstContact Companies or databases using the 'Automatic' or 'Automatic, manual file search' import functions in the System module.

Raw Data

This export is used for system maintenance, and requires a FirstContact system expert to be used correctly.

Run Timed Backup

FirstContact contains a timed back-up feature whereby a database back-up file can be created automatically every day. To specify when the back-up files are to be created, and where they are to be stored, use the Timed Operations setting in the Technics module. For full details, please refer to the first chapter in this manual.

This function can be used to create a back-up immediately, naming and saving the file according to the specifications entered in the Timed Operations setting.

FirstContact Value Packs

Chapter 9: Value Packs

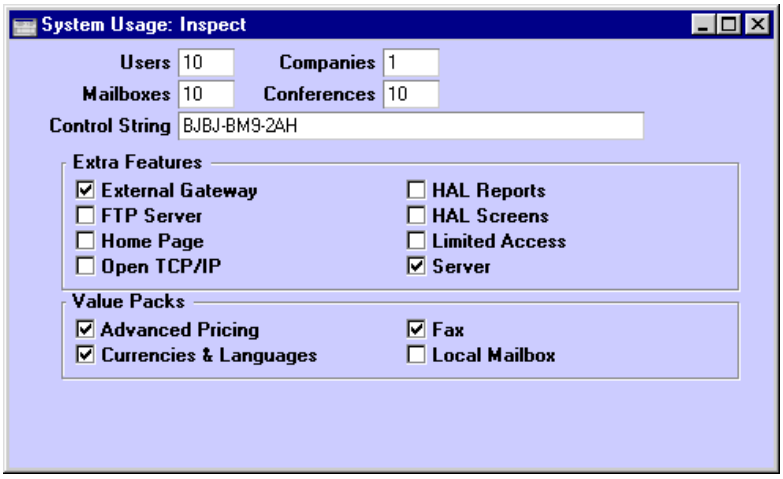
Value Packs allow you to add extra features to the basic FirstContact program. The following Value Packs are available—

- Advanced Pricing
- Languages and Currencies
- Fax
- Local Mailbox
- Corporate Portal (Web Access)
- 10 additional Conferences
- FTP Server
- Interfacing (Open TCP/IP)

This chapter describes these Value Packs in turn (for details about the Corporate Portal and Open TCP/IP, please refer to your local FirstContact representative).

You can add a Value Pack to FirstContact at any time by following these steps—

1. If you have a multi-user installation, this work should be done on the server. If it is running, ensure no other user is logged in, select ‘Quit, Remove Autoserver’ from the File menu and restart FirstContact.
2. Select ‘System’ from the Modules menu
3. Click the [Settings] button in the Master Control panel (or select ‘Settings’ from the File menu). In the resulting list, double-click ‘System Usage’.



4. Check the required Value Pack option(s) and click the [OK] button in the Button Bar to save changes and close the window.

5. Quit FirstContact and restart to allow the changes to take effect.

6. In multi-user systems, select 'Server' from the Modules menu. The clients should now log in again: they will now have access to the Value Pack(s).

7. Refer to the section entitled 'The Database Key' in the first chapter of this manual and follow the instructions to apply for a new Enabler key.

Note that, apart from this chapter, this manual assumes no Value Packs are present. When a Value Pack is present, new fields, settings and functions will be made available and therefore the appearance of some of the lists and screens in your copy of FirstContact will differ from those illustrated elsewhere in this manual. For example, if you are using the Currencies and Languages Value Pack, two additional fields (Currency and Base) will appear in the footer of the Quotation screen. All such additional fields, settings and functions are described in this chapter.

Advanced Pricing

FirstContact allows you to define various Price Lists and to allocate those Price Lists to different Customers so that the correct Prices are used when entering Quotations. When a Customer is entered in a Quotation, the Price List for that Customer is brought in to the field on card 3. When an Item is then added to the Quotation, FirstContact finds the correct Price by searching in the Prices setting for the unique record for the Price List/Item combination.

The Advanced Pricing Value Pack contains the following features—

- Automatic Price calculation, removing the need to enter records to the Price setting manually, and greatly easing the task of updating Prices; and
- Quantity discounts.

These features are now described in detail. Because they represent a significant addition to FirstContact's pricing system, this section of the manual should be read in place of the 'Prices' section in Chapter 4.

The Base Price

For each Item there is a field for the Base Price, shown on card 1. This is the Item's normal selling price. In many cases, this will be the only price used. If each Item is always sold at the same price (or with an *ad hoc* discount), whoever the Customer, you will be able to rely on the Base Price and not worry about the Price List feature.

On card 3 of the Item record, there is also a Cost Price. This indicates the cost of purchasing or making the Item. FirstContact uses the Cost Price to calculate the Gross Profit of Quotations. The Cost Price and the Base Price can both be used to calculate new prices for the Item when it is included in different Price Lists.

Structure of Price Lists

FirstContact allows you to assign different Prices to individual Items so that each Price is associated with a particular Price List. For example, many retail outlets have different prices for their retail and trade Customers, or different retail and educational prices. You might then have separate retail, trade and educational Price Lists, each of which is available to the appropriate kind of

Customer. When a Price List is specified in a Quotation, the appropriate prices will be selected automatically.

In planning such a price structure, follow these steps—

1. Enter the Items with their Base Prices, using the Item register as described in Chapter 4, 'Items and Pricing'.

2. Price Formulae should be defined, using the Price Formulae setting in the Contact module. These are the mechanism by which the different prices are calculated. In our example, the retail price might be the same as the Base Price, the trade price might represent a discount of 20% and an educational price might represent a discount of 30%. A Price Formula record would be set up for each. This process is described in detail in the next section.

3. Each Price List (retail, trade and educational) should then be defined using the Price Lists setting in the Contact module. Items or Item Groups should be attached to the Price Lists with an appropriate Price Formula. For example, in the educational Price List, all Items that are likely to be sold to such Customers should be attached, using the 30% discount Price Formula. Effectively, the relationship between the Items and the Price List is being defined here.

4. For each Price List, the Prices of the Items should be calculated. This process is automated by the provision of the 'Calculate Price Lists' Maintenance function in the Contact module. For each Item on each Price List, this function applies the specified Price Formula and saves the result in a record in the Prices setting. In our example, for each Item three Price records will be created: one each containing the retail, trade and education prices.

   The relationship between the Items, the Price Lists and the Price records makes it of critical importance that the 'Calculate Price Lists' function is run whenever the Base Price of an Item changes or, if you have Price Lists in various Currencies, whenever the exchange rate alters. Otherwise, the Price records could soon lose their relationship to the Base Price of their Items, resulting in you quoting out-of-date prices to your Customers. If a Price List is specified in a Quotation, FirstContact searches in the Prices setting for the appropriate, and unique, record representing the particular Item for that Price List. (The Currencies and Languages Value Pack must be present if you want to have Price Lists in different Currencies.)

   The 'Calculate Price Lists' function in fact can save records to one of two places depending on how the Price List record has been defined: the

Prices setting and the Quantity Dependent Prices setting. The Prices setting contains a single price to be applied irrespective of the quantity sold, while the Quantity Dependent Prices setting can be used to set up quantity discounts.

5. Each Customer, and/or Customer Category record can now be assigned a Price List. When Quotations are entered for each Customer, prices will be taken from the specified Price List automatically. If an Item not on the appropriate Price List is sold, the Base Price will be used.

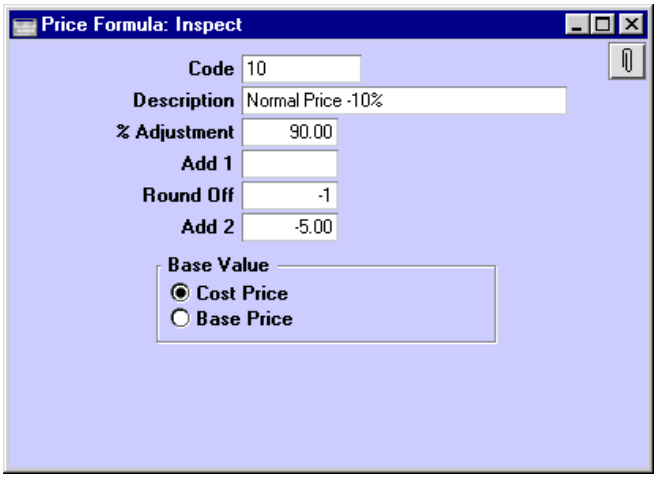
6. Once calculated, Price Lists can be printed or exported to disk for incorporation into your company's publicity material. Price Lists are printed using the report of the same name, available in the Contact module. This is fully described in the 'Reports' section of Chapter 4, 'Items and Pricing'.

Below, steps 2-4 are described in detail. These descriptions are followed by worked examples.

Price Formulae

When Items are assigned to a Price List, it is by means of a Price Formula. Price Formulae are used to calculate prices for that Price List, based on the Base or Cost Price of the Items.

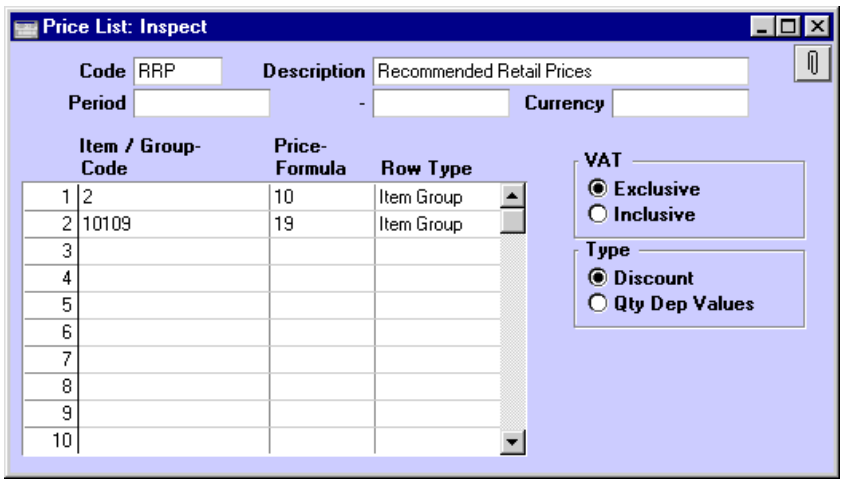
To define a new Price Formula, first move into the Contact module using the Modules menu. Then click [Settings] in the Master Control panel or select 'Settings' from the File menu. Double-click 'Price Formulae' in the resulting list and click [New]. Once entered, click [OK] to save the record.



Code	Enter a code by which the Price Formula can be identified.
Name	Specify a name for the Formula.
% Adjustment	The value entered here is used to calculate the price. The value is entered as a percentage: enter “110” to add 10% to the base price, “90” to deduct 10%.
Add 1	Add or deduct a fixed amount. If used in combination with the field above, the addition or deduction will take place after the percentage adjustment.
Round Off	Specify here the number of decimal places you wish to be used in the calculation. Enter zero to round the price to the nearest whole monetary unit (e.g. to the nearest £ or $), 1, 2 etc. (positive) to calculate to one or two decimal points respectively, and -1, -2 etc. to round to the nearest ten, hundred etc.
Add 2	Add another fixed amount after the rounding process.
Base Value	Specify here the figure on which the calculation is to be based.

Price Lists

To define a new Price List, first ensure you are in the Contact module using the Modules menu. Then click [Settings] in the Master Control panel or select ‘Settings’ from the File menu. Double-click ‘Price Lists’ in the resulting list and click [New].



Code Enter a unique code here, by which this Price List will be identified elsewhere in FirstContact.

Description Name the Price List here.

Period **Paste Special** Current Date

If the Price List is valid for a certain period, enter that period in these two fields. If this Price List is assigned to a Customer, it will only be used during the period entered here. At other times, the Base Price for each Item will be used.

These fields cannot be changed once the Price List has been saved for the first time.

Currency **Paste Special** Currencies setting, System module

Indicate here the Currency in which the prices in the price list are quoted. This field will only be visible when the Currencies and Languages Value Pack is in use. The Price Formula (described below) should include an exchange rate element so that, when using the 'Calculate Price Lists' function to calculate prices, the prices are converted correctly.

VAT Choose the Exclusive option if the prices calculated by the 'Calculate Price Lists' function are to exclude VAT, and the Inclusive option if they are to include VAT. In the case of 'Inclusive' and 'Exclusive' Price Lists using the same Price Formulae, the resulting prices will numerically be the same but in the former case the figures will include VAT.

If an 'Inclusive' Price List is used in a Quotation, the Unit Price, Sum and Total figures will all include VAT, but if an 'Exclusive' Price List is used, the Unit Price and Sum figures will exclude VAT. In both cases, VAT will be calculated using, in order of preference, the VAT Code specified for the Item or for the Item Group.

Type The 'Calculate Price Lists' function can save records in one of two places: the Prices setting and the Quantity Dependent Prices setting. The Prices setting contains a single price to be applied irrespective of the quantity sold, while the Quantity Dependent Prices setting can be used to set up quantity discounts.

Select the Discount option if the Price List is to save to the Prices setting, otherwise select the Qty Dep Values option.

The Type is also of importance in determining pricing in Quotations. If the Price List specified in a Quotation (on card 3) has had the Discount option selected, pricing will be determined by the Prices setting. Otherwise, pricing will be determined by the Quantity Dependent Prices setting.

The table is used to determine the Items that will appear in the Price List, and at what price. Use each row to include an Item or a whole Item Group in the Price List. If an Item Group is specified, all Items in the Item Group will appear in the Price List.

Item Code **Paste Special** Item Groups setting, Contact module

This field can contain either an Item Code or an Item Group Code. If it is to contain an Item Group Code, 'Paste Special' can be used. If you wish this Price List to apply to all Items in the Item register, leave the field blank.

Price Formula **Paste Special** Price Formulae setting, Contact module

Specify here the code of a Price Formula, defined as described in the previous section. It is used to calculate the prices for this Price List. Note that, in a particular Price List, different Items can have their Prices calculated using different Formulae.

If the Currencies and Languages Value Pack is present and the Price List is in a foreign Currency, the Price Formula should be calculated to include an exchange rate element as well as the basic percentage uplift or discount. This will allow the 'Calculate Price List' function to convert the prices to the foreign Currency correctly. If the exchange rate changes, the Price Formula can be adjusted and the 'Calculate Price List' function used to recalculate prices.

Row Type	**Paste Special**	Choices of possible entries

This field can contain one of two entries: “Item” or “Item Group”. It indicates whether the Item Code (the left-hand column) refers to an Item or an Item Group. Use ‘Paste Special’ to increase input speed.

A Price Formula must be specified for each row in the table. Otherwise, when the Price List is built, the Item or Item Group will be given a zero price.

The Prices Setting

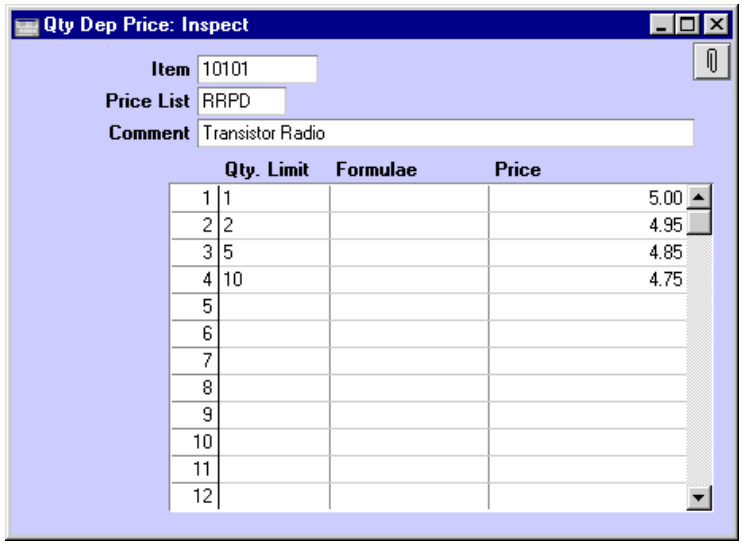
It is possible to create several alternative Prices for each Item. These Prices are recorded as records in the Prices setting, one record for each Price for each Item.

In most cases, these records will be created automatically using the ‘Calculate Price Lists’ Maintenance function in the Contact module. They will then be updated each time the function is run.

The Quantity Dependent Prices Setting

The Quantity Dependent Prices setting in the Contact module provides an alternative to the Prices setting. It allows the use of quantity discounts for each Item.

To create records in the Quantity Dependent Prices setting, first select the Qty Dep Values option in the Price List(s) concerned. Then, run the ‘Calculate Price Lists’ Maintenance function in the Contact module. The quantity discounts should then be entered to each record manually.



In the example illustration, the price for Item 10101 will be as follows—

Quantity Sold	Unit Price
1	5.00
2	4.95
3-5	4.85
over 5	4.75

In the example, the Price column has been used to specify an absolute price for each quantity break. The Formula column could be used instead to calculate each price: use ‘Paste Special’ to enter the correct Price Formula.

Note that although records in the Quantity Dependent Prices setting are created by the ‘Calculate Price Lists’ function, they will not subsequently be updated by that function.

The ‘Calculate Price Lists’ function

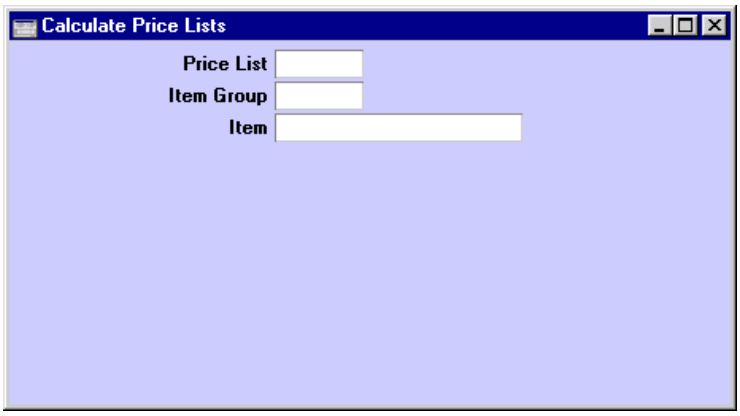
This function can be run once the steps described above (defining Items, Price Formulae and Price Lists) have been completed. For each Item on each Price List it will calculate a new price using the Formula specified and save it in a Price record. This will result in there being a single, unique, Price record for each Item/Price List combination, making the use of Price Lists in Quotations extremely fast. As a consequence, each time a price that is used as a base price by a Formula is changed, the function should be run again to update the Price records. The function should also be used regularly if you have Price Lists in foreign Currencies with exchange rates that change

frequently. In this case, change the Price Formulae to take the exchange rate changes into account before running the function.

If, in a particular Price List, the Qty Dep Values option is being used, this function will save to the Quantity Dependent Prices setting instead of the Prices setting. Again, this register will feature a single, unique, Price record for each Item/Price List combination. Note, however, that these records will not be updated when the function is run on later occasions.

If there is both a Price record and a Quantity Dependent Price record for the same Item/Price List combination, priority will depend on how the Price List has been defined. If the Price List is of Discount Type, the Price record will be used, while if it is of Qty Dep Value Type, the Quantity Dependent Price will be used.

To use this function, ensure you are in the Contact module using the Modules menu and select 'Maintenance' from the File menu. Double-click 'Calculate Price Lists' in the subsequent list. The following dialogue box appears—



Leave all fields blank and click [OK] to calculate all prices. To restrict the calculation process, use the fields as described below before clicking [OK].

Price List **Paste Special** Price Lists setting, Contact module

Enter the code identifying the Price List you want to update. Leave the field blank to recalculate all Price Lists.

Item Group **Paste Special** Item Groups setting, Contact module

Limit the calculation to a single Item Group. Prices will only be recalculated if the Item Group is explicitly

included in the grid of the Price List specified in the field above. If no Price List is specified, prices will be recalculated for all Price Lists in which the Item Group is included.

Item **Paste Special** Item register

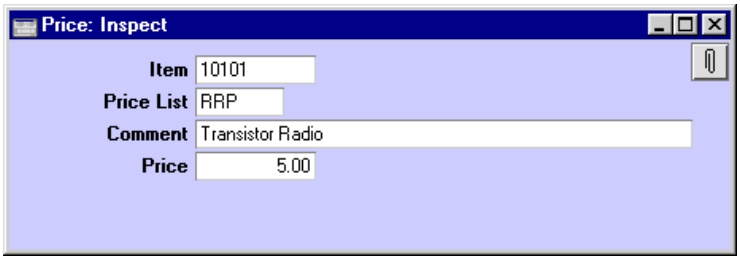
Limit the calculation to a single Item. The Item does not have to be explicitly included in the grid of the specified Price List: its Price will also be recalculated if its Item Group is in the grid or if the first column of the grid is blank (i.e. if the Price List includes all Items).

When [OK] is clicked, the function may take a few minutes to run, depending on how many prices you are updating.

Entering Price Records Manually

It is also possible to enter Price records manually. You might want to do this to assign a particular price to an Item, rather than one which is calculated using a formula. FirstContact will prevent you entering a Price record for an Item/Price List combination if one already exists by displaying the error message “Already Registered”.

To enter a new Price record, open the Prices setting from the ‘Settings’ list in the Contact module and click [New]. Enter the Item Number of an existing Item, using ‘Paste Special’ if necessary to select from a list of Items, and press Return. The Item Name from the Item register is shown. Enter the required Price (in the Currency of the Price List if it has one), specify a Price List, again using ‘Paste Special’, and click [OK].



Assigning a Price List to a Price item has the following effects—

- It will be included when the Price List is printed, using the report in the Contact module.
- When a Quotation is created, a Price List can be specified which will determine the Prices used. The Price List can be specified on three levels: for each individual Quotation; for each Customer; or for

Customer Categories. The second and third alternatives involve the Customer's Price List being offered as a default whenever a Quotation is entered in the Customer 's name.

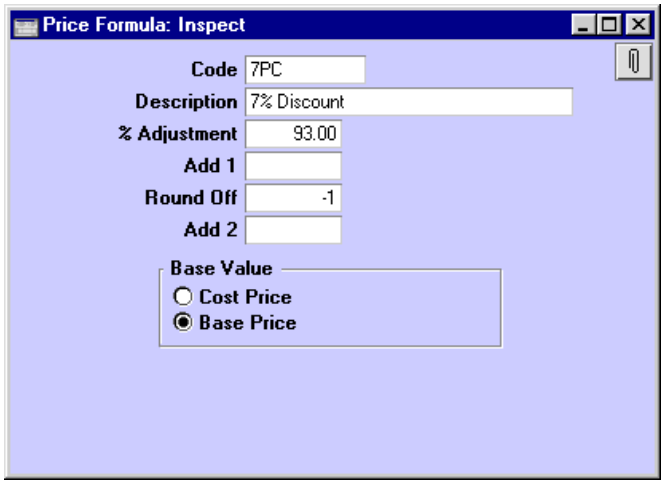
- If a Currency code is entered in the Price List record, the Prices in the Price List will be in that currency. If the Price records have been created using the 'Calculate Price Lists' function, they will have been converted from the home Currency to that specified using the conversion factor that you have incorporated in the Price Formula. If such a Price List is used in a Quotation, be sure that it is in combination with the correct Currency. If a different Currency is used, the prices will not be converted: for conversion to take place, the Price List must be changed as well.

Examples

Creating Price Lists

This example shows you how to create a new Price List in which the Prices for each Item are the Base Price less 7%, rounded up to the nearest 10 monetary units.

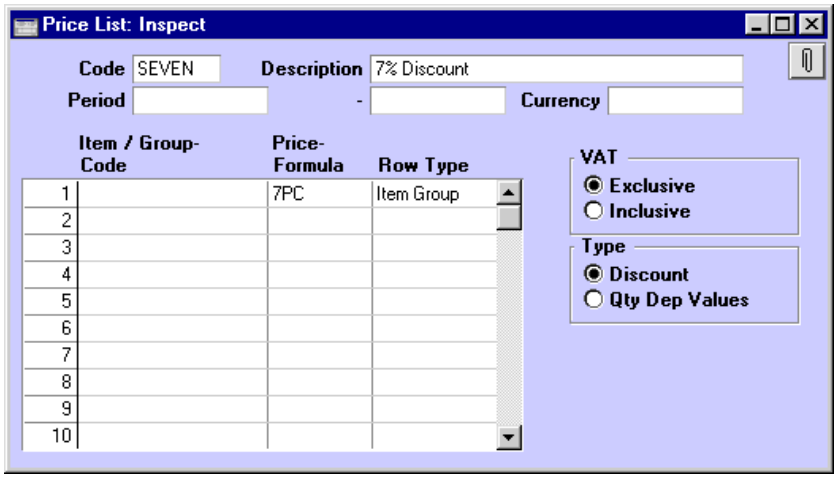
Start by creating a new Price Formula record using the Price Formulae setting in the Contact module.



Give a name to the formula. In the % Adjustment field, enter the value "93" (representing a 7% discount) to give the calculation formula. The field round-off gives instructions for rounding off the calculated value. A zero means that the price will be rounded to the nearest monetary unit (Pound, Mark, Krona,

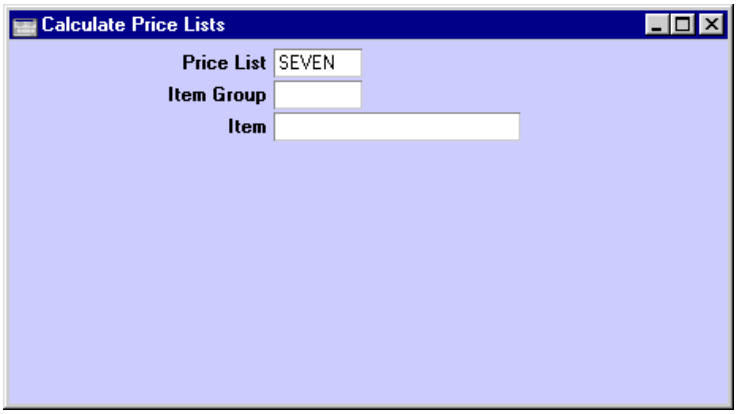
Dollar etc.). 1 and 2 (positive) provide prices to one or two decimal places, and -1, -2 etc. round to the nearest ten, hundred etc. unit of the currency. For the example, “-1” is entered. Finally, select the Base Price to act as the base value for the calculation. Save the Price Formula by clicking [OK].

Now, create a new Price List using the setting in the Contact module, with the code “SEVEN”, and an appropriate name. Enter the Code of the Price Formula that you have just set up in the Formula field.



If you leave the Item Code field blank, a new Price List will be created for all Items in the Item register. Otherwise enter one or more Items or Item Groups in separate rows to apply different Price Formulae to different products. Save the Price List by clicking [OK].

To create the new Price records, select ‘Maintenance’ from the File menu. Double-click ‘Calculate Price Lists’, and specify in the following dialogue box that Price records for the Price List “SEVEN” are to be created—



New Price records will be added to the Prices setting if this is the first time you have run the function for this Price List. Otherwise, the Prices will simply be recalculated. The creation will take some time, depending on the number of records. When the job is finished, the new records are visible in the Prices setting.

Creating a Price List in another Currency

This example requires both the Advanced Pricing and the Currencies and Languages Value Packs to be present.

The procedure described above can be used again here, with two amendments—

1. When entering the Price List, specify the appropriate Currency.

2. When defining the Price Formula, take the exchange rate into account. Using the previous example of a 7% discount, if the exchange rate is 1.5 (foreign Currency):1 (home Currency), the % adjustment in the Price Formula should be—

$$\%\ \text{Adjust} = \frac{\text{foreign Currency}}{\text{home Currency}} \times \text{discount percentage adjustment}$$

$$= \frac{1.5}{1} \times \frac{93}{100}$$

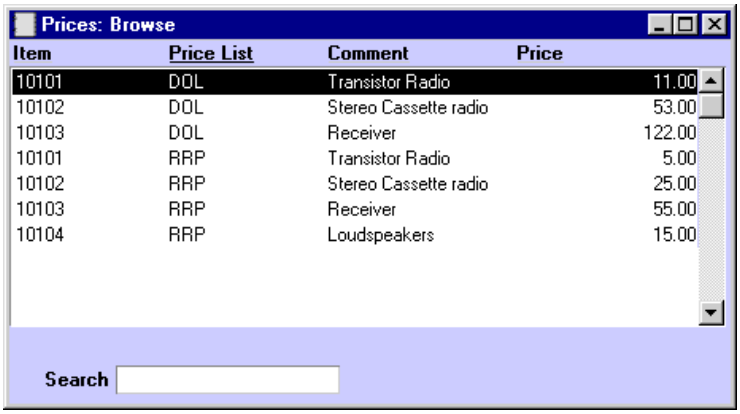
$$= 139.50$$

When the ‘Calculate Price Lists’ function is run, the Prices of all Items will be converted to the selected Currency. The Price records created will therefore contain Prices in the converted Currency.

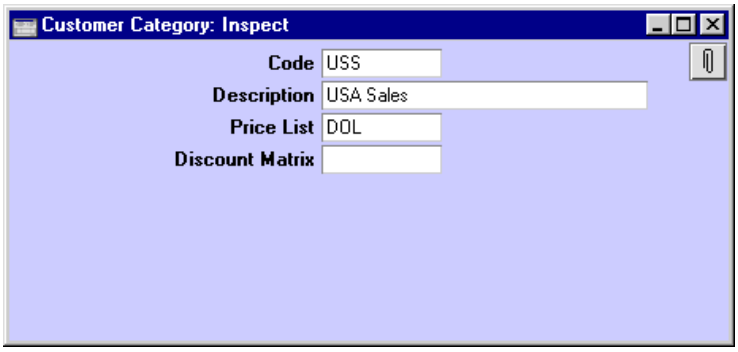
Prices in Currency

This example requires both the Advanced Pricing and the Currencies and Languages Value Packs to be present.

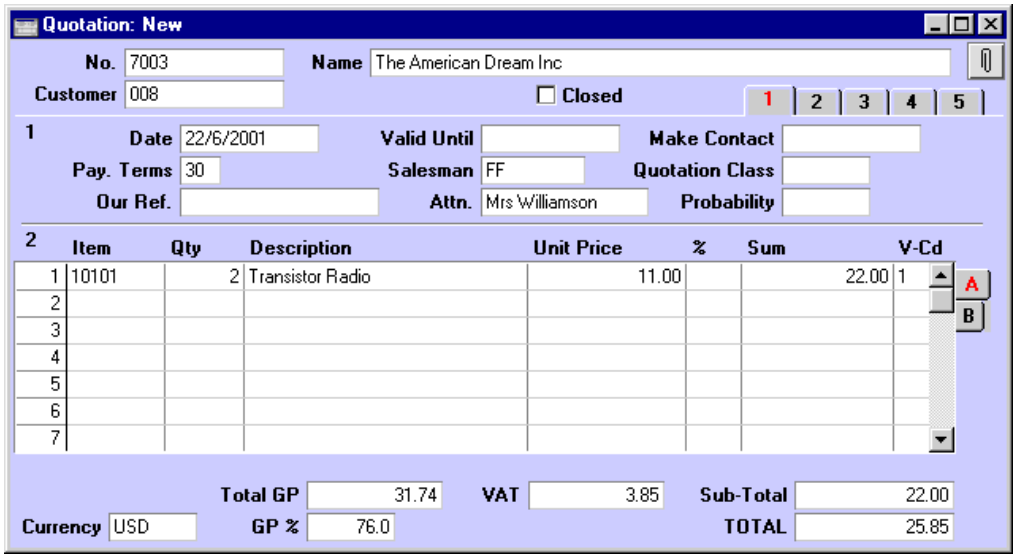
The following Prices have been defined—



The Price List “DOL” has three members, Item Numbers 10101 to 10103. It has US dollars as its Currency. All Prices in the “DOL” Price List are therefore in dollars. The Price List “DOL” is assigned to the Customer Category “USS”—

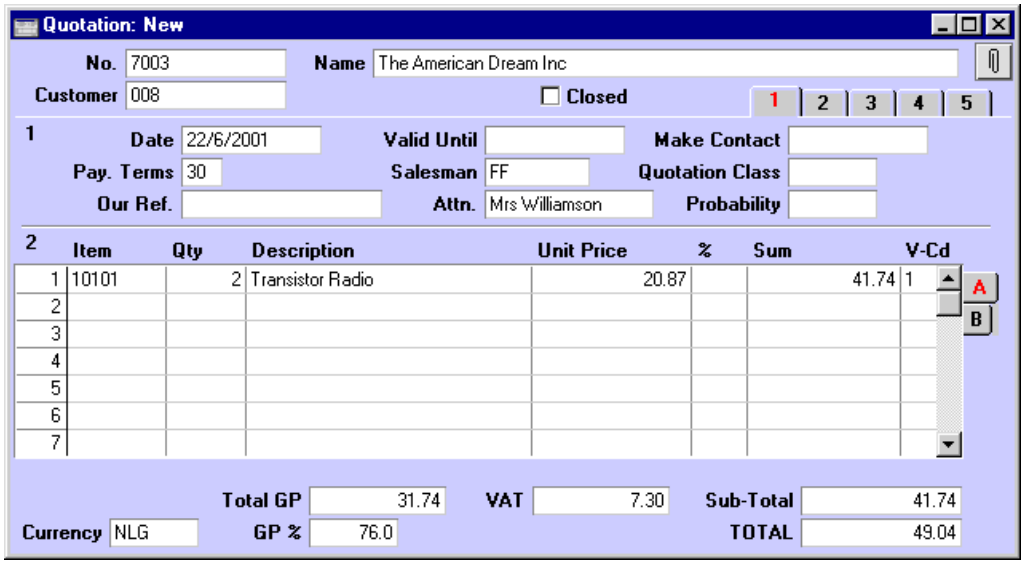


Customer no 008 is a member of this Customer Category. When a Quotation is issued for this Customer, FirstContact will automatically use the prices on the “DOL” Price List. If this Quotation is assigned the Currency Code “USD” (for US dollars), the Quotation will be issued in dollars (i.e. the prices will be taken straight from the “DOL” Price List without any further conversion).

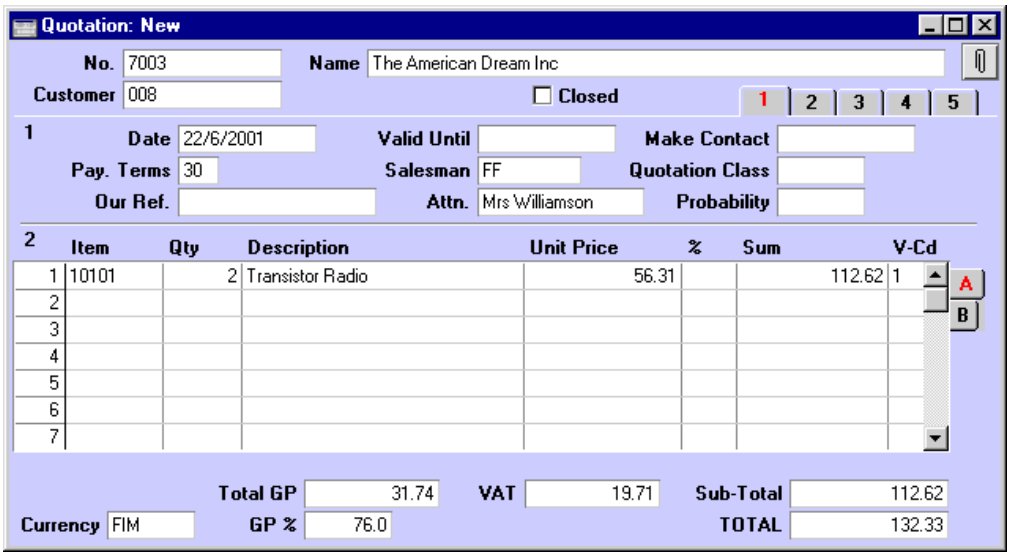


If the Quotation instead is to be issued in the home Currency, ensure the Currency field is blank or showing the Currency Code for the home Currency (Dutch Guilders in the example) and, on card 3, specify a Price List that uses the home Currency and the appropriate % Adjustment.

The role of the Price List is to ensure the Prices are in the correct Currency. The Currency field itself is for information only, allowing the Currency of the Quotation to be ascertained at a glance.



If, for some reason, the Quotation is to be issued in another Currency, e.g. Finnish Markka, the Currency and Price List fields of the Quotation should be amended accordingly and the prices will be converted to that Currency in the Quotation—



This example shows that, if you will be changing Currencies in this way, you should define a Price List for each Currency/% Adjustment combination that you are likely to use. To ensure the correct Price List is always used, allocate the appropriate Price List to each Customer depending on their Currency.

If, once the Items have been entered, you realise that an incorrect Price List has been used, there is no need to delete the Items and start again. Change the Price List and select the 'Update Currency Price List Items' function from the Special menu. This will convert the prices of all Items on the Quotation to those in the new Price List.

Note that in each illustration, the Total GP remains the same, because it is always expressed in the home Currency.

Quantity Discounts

It is possible to set up a complex quantity discount system in FirstContact. To do so, two settings in the Contact module are used: Quantity Dependent Discounts and Discount Matrices. Quantity Dependent Discounts should be defined first, as they are used by the Discount Matrices.

When entering Quotations, quantity discounts are applied automatically as appropriate, after the Item's price has been determined by reference to any Price Lists that may apply. The discount will be shown in the % field.

In planning such a discount structure, follow these steps—

1. Enter the Items with their Base Prices to the Item register, as described in Chapter 4, 'Items and Pricing'. Assign each to an Item Group.

2. Quantity Dependent Discounts should be defined, using the setting in the Contact module. This is where the various quantity breaks are defined. Quantity breaks can be based on quantity, weight, volume or Quotation value. If you offer quantity breaks for different Items, define as many Quantity Dependent Discount records as necessary.

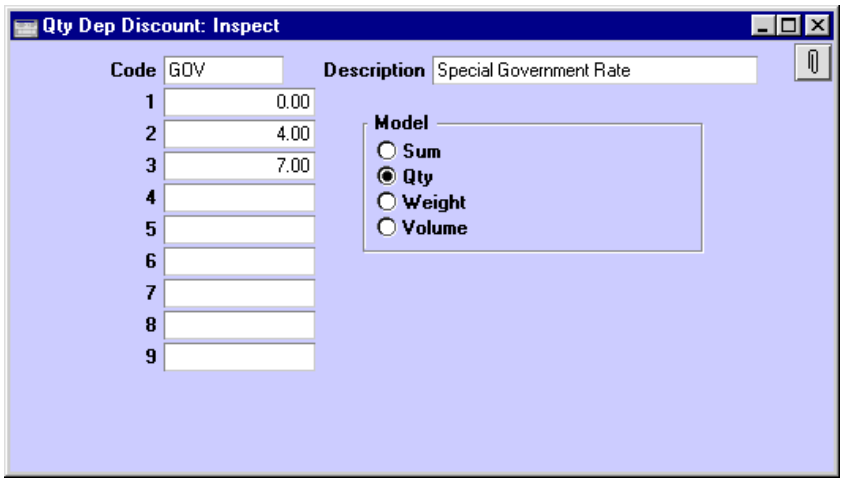
3. The discount levels can now be specified, using the Discount Matrices setting in the Contact module. Each set of discount levels (a 'Discount Matrix') will use the quantity breaks defined in step 2. A single set of discount levels can apply to all Items, or to specified Item Groups.

4. Each Customer or Customer Category can now be assigned a Discount Matrix. To do this for a Customer, use the Discount Matrix field on card 3 of the Customer screen, using 'Paste Special' if necessary. When Quotations are entered for each Customer, the specified discount structure will be used automatically.

5. The Quantity Dependent Prices setting (described in the previous section) can be used in combination with Discount Matrices. When entering Quotations, the Item's price will first be affected by the applicable Quantity Dependent Price and then by the Discount Matrix. In essence, the main difference between the two discount methods is that the quantity discounts in the Quantity Dependent Prices setting are absolute values, while those in the Discount Matrices are percentages. If your business is one where prices are fairly volatile, the latter method will require less maintenance. Also, Discount Matrices can apply quantity discounts based on weight, volume or value sold, in addition to quantity sold.

Below, steps 2 and 3 are described in detail.

Quantity Dependent Discounts



This setting in the Contact module is used to define the quantity breaks which will be used by the Discount Matrix setting. You can establish as many sets of quantity breaks as necessary. They can be based on sales quantity, sales value, weight or volume. Each set of quantity breaks can be used by any number of Discount Matrices, allowing you to define different discount structures based on the same quantity breaks.

Code — The code for the definition, by which it will be identified from the Discount Matrix screen.

Description — A text describing the definition.

1-9 — These fields are used to define the quantities which are to function as the threshold for each discount level (i.e. the quantity breaks). These quantities can be values, quantities, weights or volumes, specified using the Model options to the right.

In the example illustrated, the discount structure is based on the Quotation quantity. There are three discount levels: fewer than four items, between four and seven items, and seven items or more. To implement this, “0” has been entered in the first row, “4” in the second and “7” in the third. The percentage discounts for each discount level are defined in the corresponding Column fields on the Discount Matrix screen.

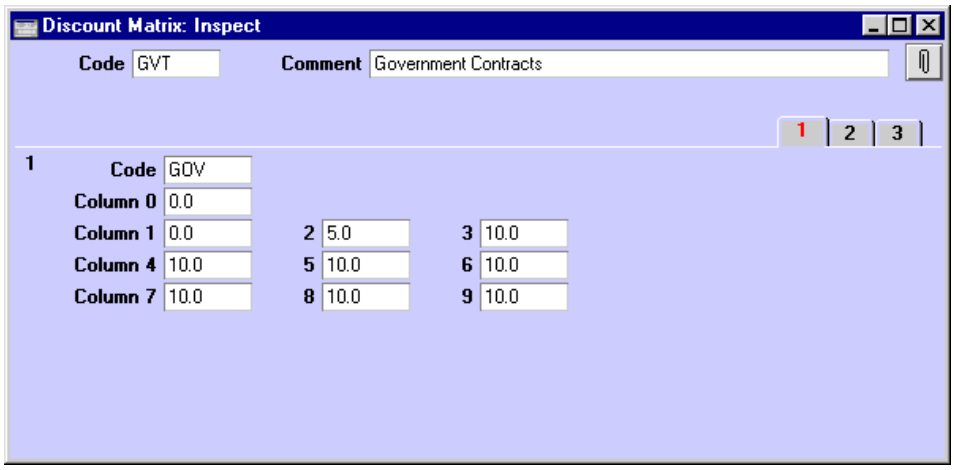
Model — Select one of the alternatives to indicate how the calculation will be made.

Sum	The discount level will be based on the total value of the Quotation row.
Qty	The discount level will be based on the Quantity of the Quotation row.
Weight, Volume	Weight or volume will be used as the base.

Discount Matrices

This setting in the Contact module allows you to specify the discount percentages that are to be applied to the quantity breaks already defined. Each set of discount percentages (a 'Discount Matrix') can then be applied to Customers (using the field on card 3 of the Customer screen) or Customer Categories. Once this has done, whenever you include a quantity of a particular Item on a Quotation, the appropriate quantity discount will be calculated automatically.

Header and Card 1



Code	This code identifies the matrix, and is used to call it from other parts of FirstContact.
Comment	Enter a name for this matrix.

Card 1 appears below the header. It is used to define overall discount structures that will apply whatever the Item sold. To define Item-dependent quantity discounts, use card 2.

Code **Paste Special** Quantity Dependent Discounts setting, Contact module

Use 'Paste Special' to specify a code of a Quantity Dependent Discount record, as described in the previous section. This will identify the quantity breaks: the fields below will be used to specify the discount rates for those breaks.

Col. 0-9

Specify here the percentage discount levels for each quantity break: usually, the percentage discount will increase with the size of the purchase.

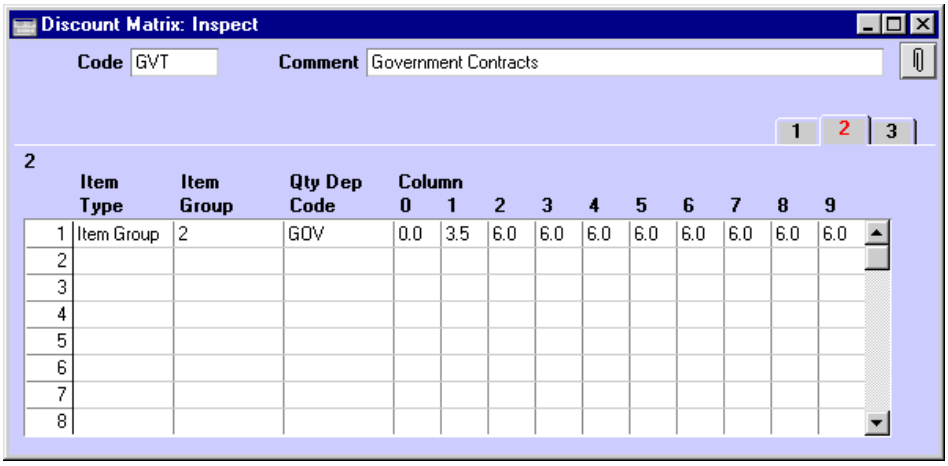
In the example illustration, the discount structure will be as follows—

Quantity Sold	Discount	Field
Up to 4	0%	Column 1
4-7	5%	Column 2
Over 7	10%	Column 3

The quantity breaks have already been defined in the specified Quantity Dependent Discount record, illustrated in the previous section. Always fill in all the fields, even if not all are going to be used: the remaining column fields should contain the highest discount percentage used ("10" in the example).

The Column 0 field can be used to specify a single discount figure which will always be applied. This is the easiest way to apply an overall discount to a Quotation as this discount will be applied to all Quotation rows. In this case there is no need to specify a Quantity Dependent Discount in the Code field, and leave the Column 1-9 fields blank. Column 0 is not used if the Column 1-9 fields contain values and there is a valid Quantity Dependent Discount.

Card 2



In the table on card 2, you can define different discount levels for different Items or Item Groups. Any figures entered here will take precedence over any values entered on card 1: you can therefore set up an overall structure on card 1 and an exceptional structure, perhaps applying to only one or two Items or Item Groups, on card 2.

Item Type **Paste Special** Choices of possible entries

This field can contain one of two entries: “Item” or “Item Group”. It indicates whether the Item Group (the next column) refers to an Item or an Item Group. Use ‘Paste Special’ to increase input speed.

When this Discount Matrix is used in a Quotation, if the entry is “Item”, the appropriate discount percentage will appear as soon as the Item and Quantity have been specified. However, if the entry is “Item Group”, the discount percentage of an Item is dependent on how many other Items of the same Group have been used in the same transaction. This is because the discount percentage is calculated using the total quantity, value, weight or volume of all Items in the Item Group. To calculate the discount percentage for all Items in the Group, select ‘Recalculate Discount’ from the Special menu when all Items have been added to the transaction.

If this field is set to “Item Group” and the next field is blank, the Discount Matrix will cause the ’Recalculate Discount’ function to calculate an overall discount

percentage for the transaction, from the total quantity, value, weight or volume of the Items used.

Item Group — **Paste Special** — Item Group setting, Contact module

Specify here the Item or Item Group to which the discounts in this row are to apply. The contents of the 'Paste Special' list will depend on the Item Type.

Qty Dep. Code — **Paste Special** — Quantity Dependent Discounts setting, Contact module

Use 'Paste Special' to specify a code of a Quantity Dependent Discount record, as described in the previous section. This will identify the quantity breaks: the fields to the right will be used to specify the discount rates for those breaks.

Column 0-9

These fields operate in the same manner as those with the same name on card 1.

If you enter a percentage in Column 0, that will apply to all sales of the Items in question to Customers who use this discount matrix. Any figures entered to the Column 1-9 fields will take precedence over any value entered here.

Use Columns 1-9 to specify the percentage discount levels for each quantity break. Usually, the percentage discount will increase with the size of the purchase. These percentages are linked to the quantity breaks defined in the Quantity Dependent Discount records. Always fill in all the fields, even if not all are going to be used: the remaining column fields should contain the highest discount percentage used.

Card 3

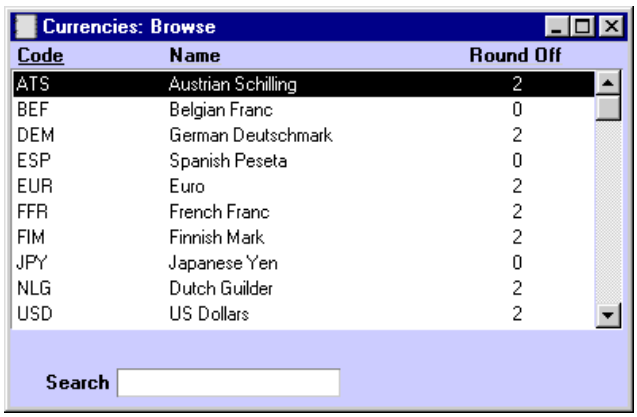
The fields on card 3 of the Discount Matrix screen are used in Denmark only, where payment for Invoices for certain kinds of work can be shared between the Customer and the state. Please refer to your local FirstContact representative for full details.

Currencies and Languages

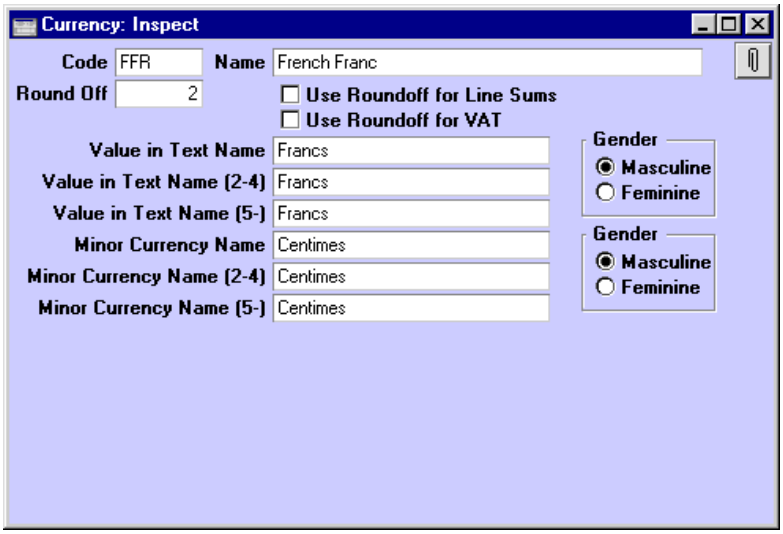
Currencies

This Value Pack allows you to enter Quotations using foreign Currencies. Each Customer can be assigned a default Currency: the one in which their Quotations are usually issued. When a Quotation is created, this Value Pack can be used together with the Advanced Pricing Value Pack described above to ensure that FirstContact will automatically convert the prices to the appropriate foreign Currency.

The different Currencies used by your Customers are defined using the Currency setting in the System module. Ensure you are in the System module using the Modules menu and click the [Settings] button in the Master Control panel (or select 'Settings' from the File menu). Double-click 'Currencies' in the resulting list to open the 'Currencies: Inspect' window—



This shows the Currencies already entered. To add a Currency, click [New] in the Button Bar. The 'Currency: New' window is opened—



Code The unique Code by which the Currency will be identified from everywhere in FirstContact.

Name The name of the Currency.

Round Off This field is used to set the rounding rules for each Currency. These rounding rules take priority over those set in the Round Off setting in the System module. The code is used as follows—

2 Shows two decimal places in the Total field of any transaction.

1 Rounds to one decimal place in the Total.

0 Rounds up or down to the nearest whole unit of the Currency.

-1 Rounds the Total up or down to the nearest 10 units.

-2 Rounds to nearest 100 units… and so on.

Use Round Off for Line Sums

The Round Off specified above applies to the Quotation Total. Check this box if you would like it to apply to the Sum field in each row as well.

Use Round Off for VAT

Check this box if you would like the Round Off to apply to the VAT field in Quotations as well as the Total.

Value in Text Name

Enter here the name of the Currency as it is to be shown on printed Quotations . The Value in Text Name (2-4) and (5-) fields are used in Languages such as Russian and Lithuanian with more than one plural form, depending on the quantity involved. For more details about including amounts in words in a document, please refer to the section describing the Values in Text setting in the 'System Module' chapter in Volume 1 of these manuals.

Minor Currency Name

The Minor Currency is the one hundredth part of the Currency (for example, pence, centimes or öre). Enter here its name as it is to be shown on printed Quotations. The Minor Currency Name (2-4) and (5-) fields are used in Languages such as Russian and Lithuanian with more than one plural form, depending on the quantity involved.

Gender

These options are used in Languages with two genders: use them to signify the genders of the Value in Text Name and the Minor Currency Name.

The Values in Text setting in the System module contains a grid where the words for each number between one and 99 can be entered. This grid has two columns, for the masculine and feminine versions of these words. The appropriate version is used, depending on the gender set here.

Once the Currency has been entered, click the [OK] button in the Button Bar to save it. To close the window without saving changes, use the close box.

Customers and Quotations

If you are using the currency option, each foreign Customer can be assigned a Currency. This is done on card 4 of the Customer screen. The Currency can be entered using the 'Paste Special' function.

Once this has been done, as soon as a Customer is entered to a Quotation, the appropriate Currency will be brought in by FirstContact to the field in the

footer. This can be changed to any other Currency if necessary. It is for information only, allowing the Currency of the Quotation to be ascertained at a glance. As you add Items to the Quotations, convert the prices into Currency manually. In the TOTAL field, the figure will be rounded according to the rounding rules determined for the Currency in the Currency register.

If you have the Advanced Pricing Value Pack (described earlier in this chapter), you can also specify a Price List for each Customer using the field on card 3. Following the instructions earlier in this chapter, you can use this Value Pack to bring prices into each Quotation that have been converted to the foreign Currency automatically.

If, once the Items have been entered, you realise that an incorrect Currency and Price List have been used, there is no need to delete the Items and start again. Change the Currency and Price List as appropriate and select the 'Update Currency Price List Items' function from the Special menu. This will convert the prices of all Items on the Quotation. Remember the Currency is for information only: you must change the Price List as well to cause the prices to be updated.

Languages

The Currencies and Languages Value Pack allows you to print Quotations in the Language of the Customer, with appropriate translations of Item names, Payment Terms, etc, and using different Quotation Forms.

To set up such a system, follow these steps—

1. Enter the Languages used in your business using the Languages setting in the System module.

2. For each Customer, enter the appropriate Language to the field on card 4 of the Customer screen, using 'Paste Special' if necessary.

3. Enter translations as necessary in the following settings and registers: Items, Delivery Modes, Delivery Terms, Payment Terms and Units.

4. Using the Form register in the System module, design as many Quotation Forms as necessary in the various Languages.

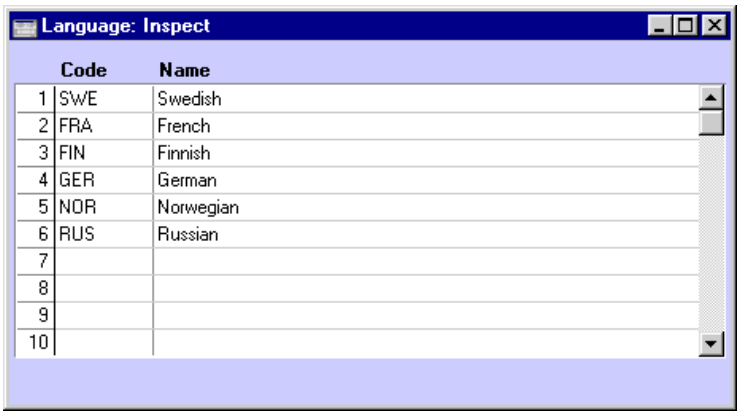
5. Using the 'Define Document' function, specify when each Quotation Form is to be used.

These steps (apart from step 2) are now described in detail.

Languages

This setting allows you to define foreign Languages: Language Codes can then be assigned to Customers. These can be used to ensure the correct Forms are used: e.g. French quotation forms to French Customers, Finnish documents for Finnish Customers etc. In addition, Language Codes can be used to show the correct translations of Item Names, Payment Terms, Delivery Terms, etc. on printed documentation.

To open the Languages setting, ensure you are in the System module using the Modules menu and click the [Settings] button in the Master Control panel. The 'Settings' list opens: double-click 'Languages'. The 'Languages: Inspect' window opens, listing the Languages that have already been entered—

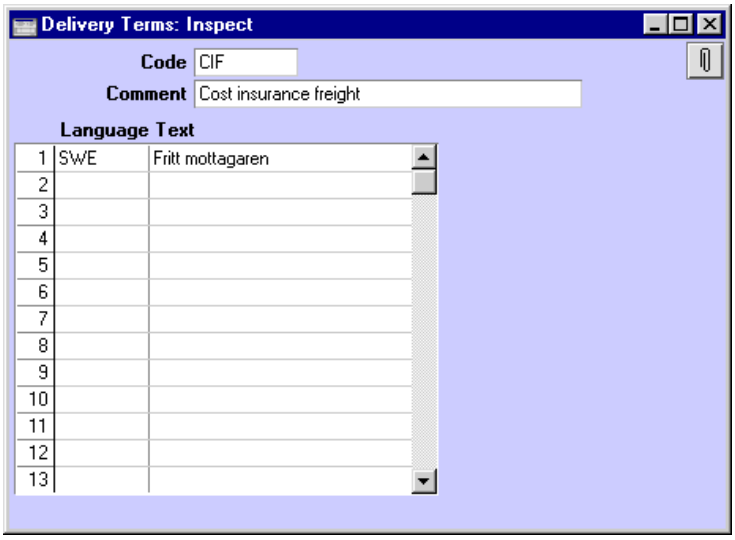


To enter a new Language, simply enter a Language Code and Name on the first blank line and click [OK] to save and close. Click the close box to close without saving changes.

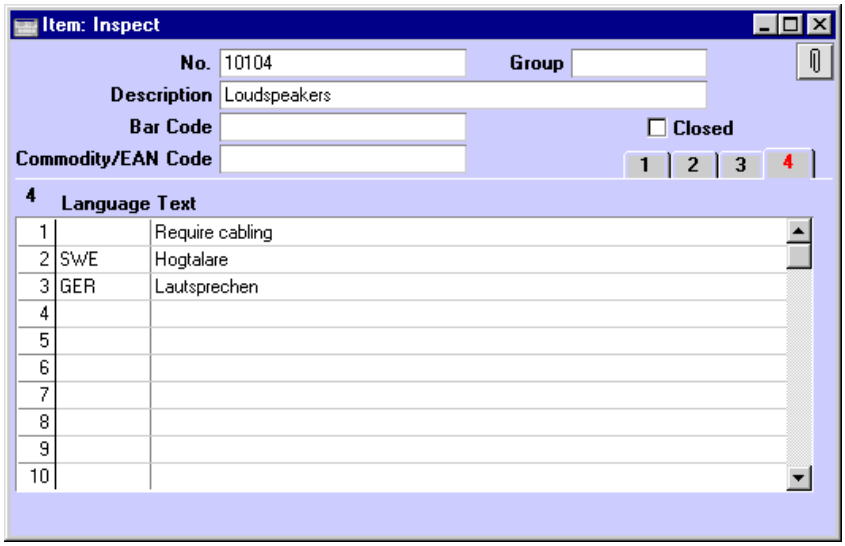
Translations

Once you have defined your Languages as described above and assigned them to Customers using the Language field on card 4 of the Customer screen, you can then enter translations as necessary in the following settings and registers: Items, Delivery Modes, Delivery Terms, Payment Terms and Units.

Open each of these records in turn. When the Currencies and Languages Value Pack is present, these records have a table where translations can be entered. As an example, this is the Delivery Terms screen—



In the case of the Item screen, there are now four cards instead of the three of the standard version. This is card 4—



This table can be used to enter various translations of the name of the Item, Delivery Term, etc. Specify a Language in the first column using ‘Paste

Special' if necessary, and the appropriate translation in the second column. There is no need to enter a row for your home Language. If you want to enter more text than fits on one row, use more than one, entering the same Language code for as many rows as necessary.

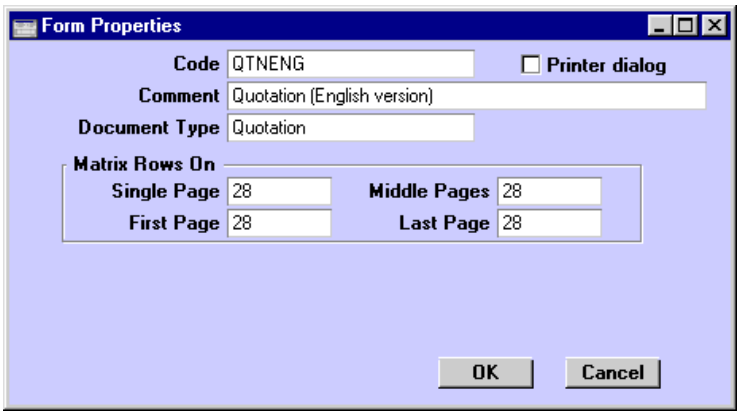
When printing Quotations, the appropriate translation will be used, depending on the Language of the Customer. In the case of Items, the correct translation will also be shown on screen when an Item is added to a Quotation.

In the case of Items only, you can also use this table to enter extended comments, such as a detailed specification, which will also appear on Quotations. To do this, leave the Language column blank and enter the text, again taking up as many rows as necessary. This text must appear above any rows with a Language code, but can be combined with them. However, in this situation, only one line of text is allowed for each of the subsequent Languages.

Printing Quotations in Different Languages

If you have Customers in different countries, you might require Quotations to be printed in the appropriate Language. If so, follow this procedure—

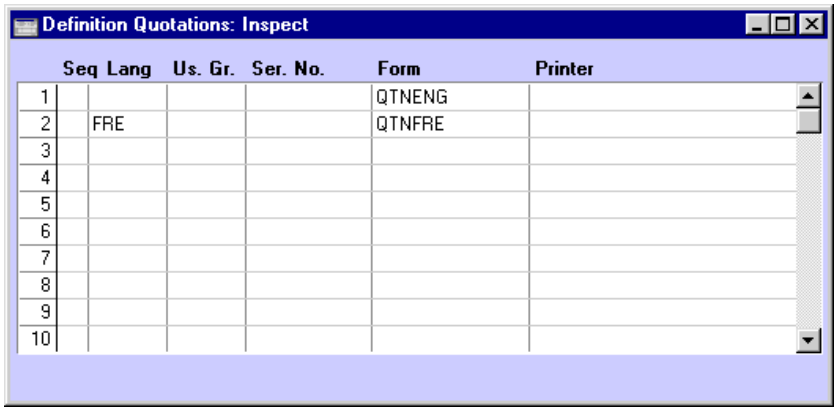
1. Using the Form register in the System module, design as many Quotation Forms as you need. For example, you might design English and French Quotation Forms and name them "QTNENG" and "QTNFRE". Use the 'Properties' function on the Special menu to assign a Document Type of "Quotation" (in both cases).



2. Select the Contact module using the Modules menu.

3. Select 'Documents' from the File menu. The 'Documents' list window is opened showing a list of available documents. Highlight 'Quotations'.

4. Select ‘Define Document’ from the Special menu.



5. In the first row, enter the name of the default Quotation Form for your local Customers (“QTNENG”). Use the ‘Paste Special’ feature to see the available forms in your Form register and to ensure the spelling is correct. On the second line, specify French as the Language and the French Quotation (“QTNFRE”) as the Form. In the example illustrated, Customers with a third Language (i.e. not English or French) will also receive Quotations printed on the “QTNENG” Form.

   You can use classifications other than Language in the Language field, and use this feature for other purposes. One example is if you want to use Quotations with different layouts for different types of sales. You can then define a fictitious Language Code, and use it to select the correct form. You can also enter a Delivery Mode in this field, permitting different Quotation layouts to be used depending on the Delivery Mode.

6. Click [OK] to save the Quotation definition. From now on, French-speaking Customers will automatically receive Quotations using the “QTNFRE” Form and others will receive the “QTNENG” Form with no user intervention.

If you choose not to use this feature (i.e. you have only one Quotation Form to be used for all Customers), translations of Item Names, Payment Terms etc. as described in the ‘Translations’ section above will still be printed. These depend on the Language of the Customer.

Fax

In some larger installations it can be useful to set up a fax server to fax documents to their recipients. This Value Pack allows you to configure FirstContact to act as a fax server. The fax server periodically interrogates the data server for fax jobs. When a user prints a document that is to be sent by fax, it is held on the data server until the next interrogation by the fax server. It is then taken from the data server by the fax server. The data server is therefore made available for the next data processing task more quickly while the fax server looks after communications with the recipient's fax machine.

The copy of FirstContact that acts as the fax server should be on its own dedicated machine (i.e. not on the same machine as the data server or any of the clients) although it can be the copy of FirstContact that is being used as the print server. If so, remember that there may be a delay in printing if a document is being faxed. The machine must be a Macintosh containing or connected to a fax modem. To configure the FirstContact fax server, follow these steps—

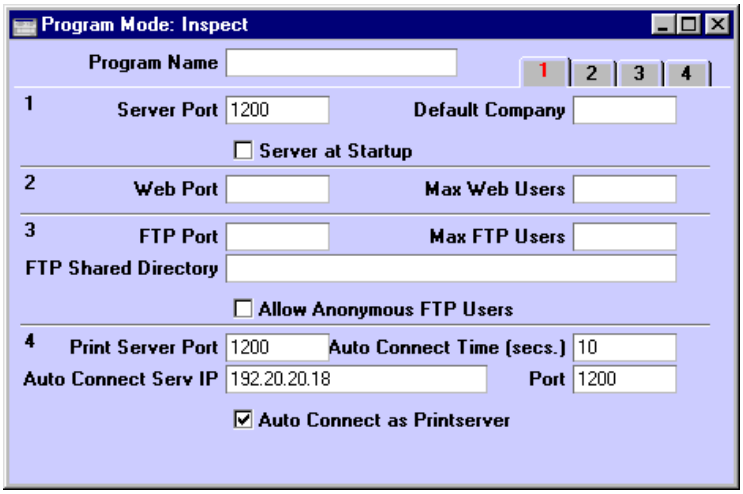
1. Create a new database on the machine that is to act as your dedicated fax server following the instructions in the section entitled 'Creating a New Database' in the first chapter of this manual. Only one Company is necessary: specify a suitable name such as "FirstContact Fax Server".

2. Using the Modules menu, change to the System module and open the System Usage setting. Ensure that the Server and Fax boxes are both checked. This may result in you needing to apply for a new database key for the fax server database.

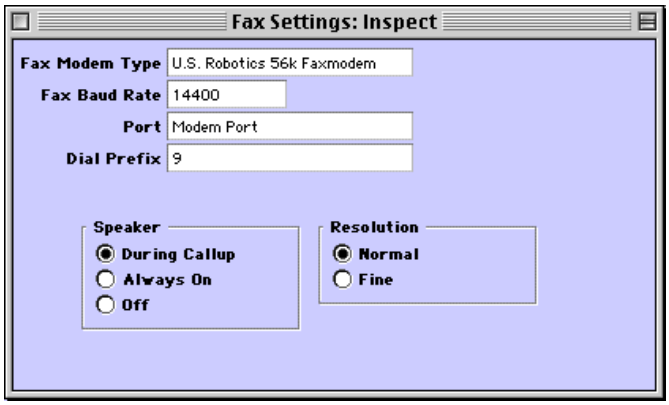
3. Select 'Technics' from the Modules menu and click the [Prog Mode] button in the Master Control panel (or select 'Program Mode' from the Registers menu).

4. Complete cards 1 and 4 of this setting in the same manner as described in the 'Setting up a Print Server' section in Chapter 8, 'System Module'. Click the [OK] button in the Button Bar to save. If you have entered any Port numbers for the first time (or changed the ones that were already there), quit FirstContact and restart to allow the changes to take effect.

   If you have already set up your print server and want it to be the fax server as well, there is no need to do this step.



5. Staying in the Technics module, open the Fax Settings setting—



Fax Modem Type **Paste Special** Choices of possible entries

Specify here the type of fax modem that is connected to your fax server machine. If your fax modem is not listed in the 'Paste Special' list, please contact your local FirstContact representatives.

Fax Baud Rate **Paste Special** Choices of possible entries

Enter the speed of your fax modem in bps here.

Port **Paste Special** Choices of possible entries

Specify here the hardware port used for communication between the fax server computer and the modem.

Dial Prefix If the modem needs to dial a number (e.g. to get an outside line) before the fax number itself, enter that number here.

Speaker Click an option to choose when you want to hear sound from the modem.

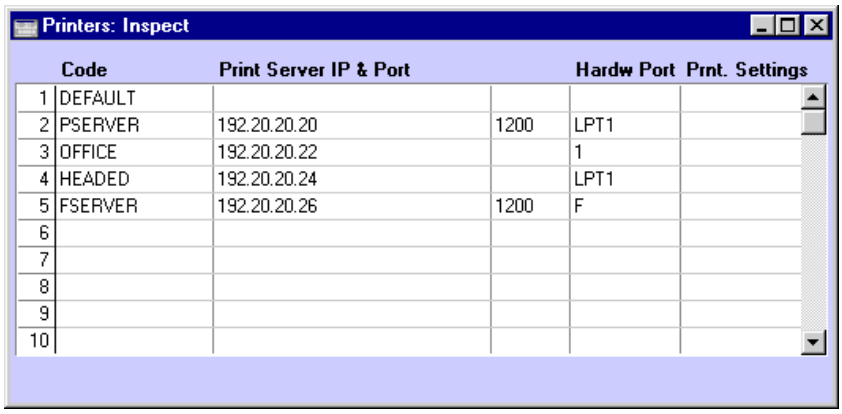
Resolution Click an option to choose the resolution of faxed documents.

When the setting is complete, save it by clicking the [OK] button in the Button Bar.

6. The final task is to select 'Server' from the Modules menu. The 'Server Status' screen appears. The fax server can now be left alone.

7. Changing to the data server (or to one of the clients with access to the System module), open the System Usage setting in the System module and ensure that the Fax box is checked. This may result in you needing to apply for a new database key for the main database. If you choose to do this work on the server and it is running, ensure no other user is logged in, select 'Quit, Remove Autoserver' from the File menu and restart FirstContact. You will then be able to change the System Usage setting.

8. The Printers setting should now be configured to make the fax server available.

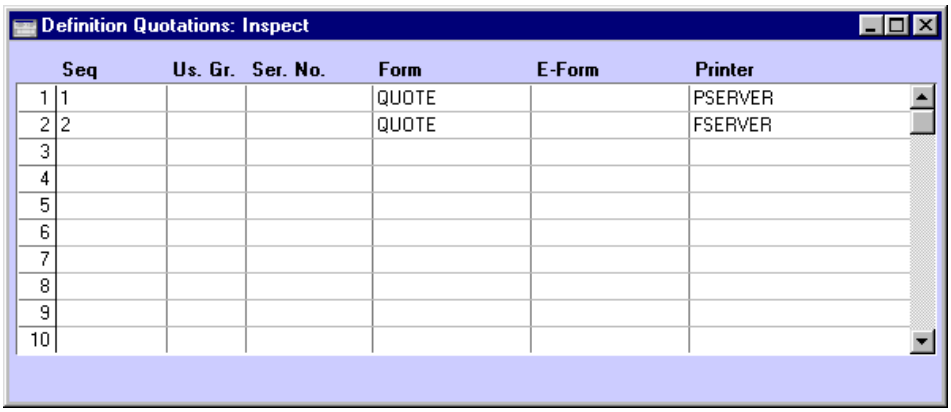


The first row of this setting should be blank (apart from the Code) as in the illustration, signifying that the Printer selected in the Control Panel (Windows) or Chooser (Macintosh) will be the default Printer.

In the illustration, the fax server has been entered on the bottom row. The IP address of the fax server machine has been entered in the Print Server IP field and the Port field shows the same number that was entered to the Print Server Port field in the Program Mode register on the fax server. The Hardware Port has been set to “F”, to instruct the fax server that the fax modem is to be used. Separate machines are being used as the fax and print servers.

When the Printers setting is complete, save it by clicking the [OK] button in the Button Bar.

9. Finally, following the instructions in the ‘Defining when Printers are to be used’ section in Chapter 8, ‘System Module’, go to the ‘Define Document’ window for each document that is to be printed through the fax server and specify the fax server in the Printer field.



In the example illustration, it has been determined that Quotations will first be printed on the print server (providing a hard copy for checking and filing) and then on the fax server. The fax number will be taken from the appropriate Customer record. Note that because the same document is being printed twice, the Seq. field has been used to specify the order of printing.

Local Mailbox

The Local Mail Value Pack allows you to read and change Mail off-line (i.e. when you are not connected to the server). When this Value Pack is present, you can log on to the server and download the contents of your Mailbox to a local Company. You can then disconnect from the server, and read and change your Mail when convenient. At the end of the day, you can reconnect to the server and upload the Mails that you have changed (and download once again any Mails that have been created or changed during the day).

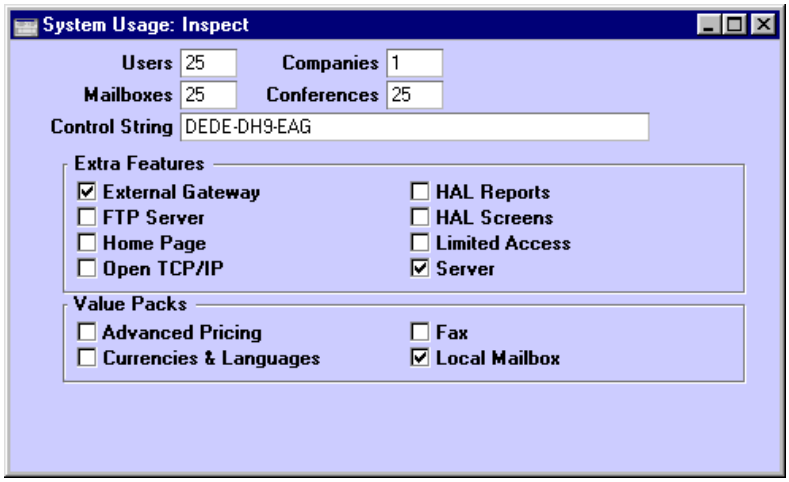
Configuring a Local Mailbox System

The Server

To configure the server for a Local Mailbox system, follow these steps—

1. If the server is running, make sure all users have logged off and select 'Quit, Remove Autoserver' from the File menu. FirstContact quits.

2. On the server machine, restart FirstContact. Log in, go in to the System module using the Modules menu and open the System Usage setting. Check the Local Mailbox box and click the [OK] button to save the change and close the window.



3. If they do not already exist, create Person records and Mailboxes for each user likely to be using the Local Mailbox system. The Person register is described in Chapter 8, 'System Module' and Mailboxes are

described in the ‘Setting up the FirstContact Mail System’ section in Chapter 6, ‘Mail’.

4. Quit FirstContact and restart, to allow the change to take effect. Select ‘Server’ from the Modules menu.

The Clients

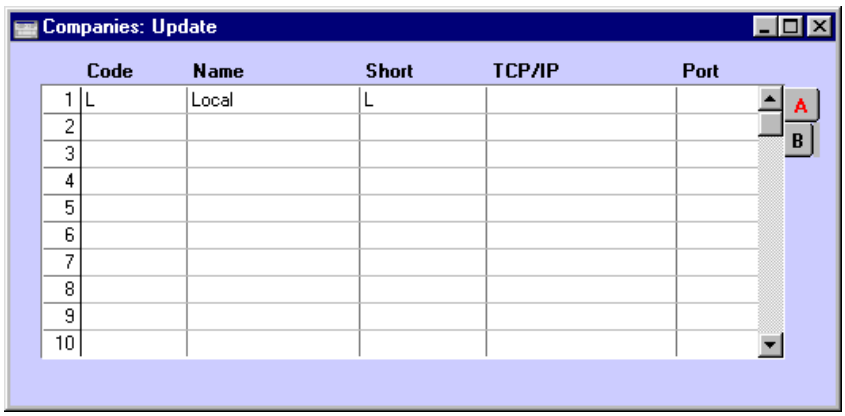
If the Local Mailbox system is in use, there should be two Companies in the databases on each client machine, as follows—

- The “Local Company” will be used to read and edit Mail off-line.
- The “Client Company” allows the user to log in to the server.

Follow these steps to configure each client machine to use the Local Mailbox system. These steps assume you are installing FirstContact on each client machine for the first time. Please refer to the end of this section if you have been using FirstContact for some time before you start using the Local Mailbox Value Pack.

1. Install FirstContact on the client. Ensure that the FirstContact folder contains the “DBDef.txt” and “Default.txt” files but not a “1Contact.HDB” file and launch the FirstContact application.

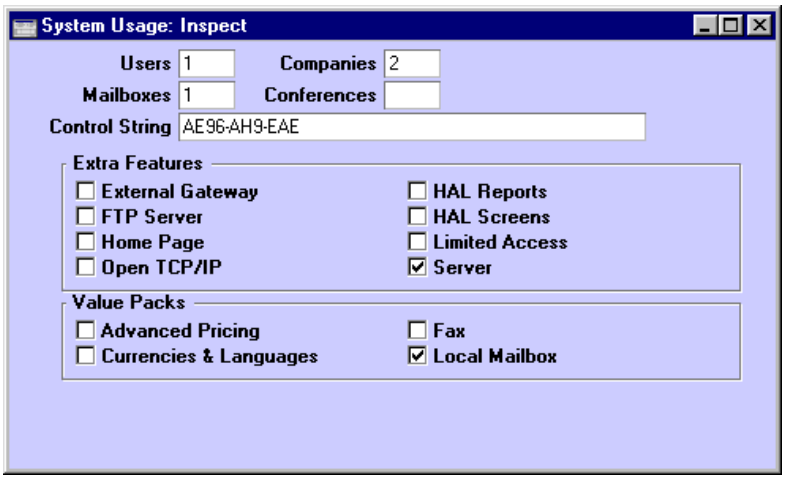
2. FirstContact opens the ‘Companies: Inspect’ window. Enter a single Company, as follows—



This is the Company that will be used to read and edit Mail off-line (the “Local Company”). As it will not be used to connect to the server, the TCP/IP and Port fields are left blank. Click the [OK] button to save and double-click the new Company in the subsequent list.

4. When the ‘Import files available’ window appears, close it by clicking the close box. Do not import anything yet.

5. Select ‘System Module’ from the Modules menu, and click the [Settings] button in the Master Control panel. Double-click ‘System Usage’.



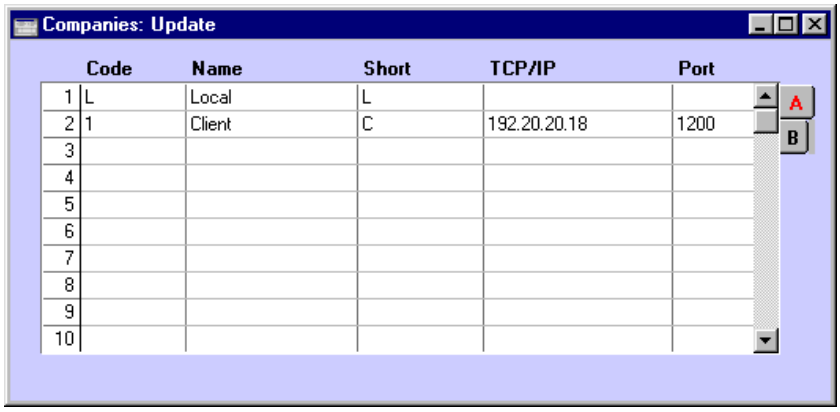
Since this is a client, the number of Users can be set to one. The number of Mailboxes should be set to the number of different users that you anticipate will be using the machine. For example, if the machine will be used by one user in the morning and another in the afternoon, set the number of Mailboxes to two. The number of Companies should be set to two. Make sure the Server and Local Mailbox boxes are checked, and check any other boxes as required. Click the [OK] box to save.

6. Open the Person register by clicking the [Persons] button in the Master Control panel or by selecting ‘Persons’ from the Registers menu. Enter Person records for all members of staff that will be using the machine. In our example, two records will be entered, one for the morning user and one for the afternoon user. Don’t forget to set passwords for all users.

   As mentioned in step 3 of the ‘Server’ section above, each of these members of staff should also have records in the Person register on the server (with the same initials), and should have Mailboxes on the server as well.

7. Change to the Technics module using the Modules menu, and click the [Settings] button in the Master Control panel. Double-click ‘Mailboxes’, and create a Mailbox for each user. In the example, two Mailboxes will be created.

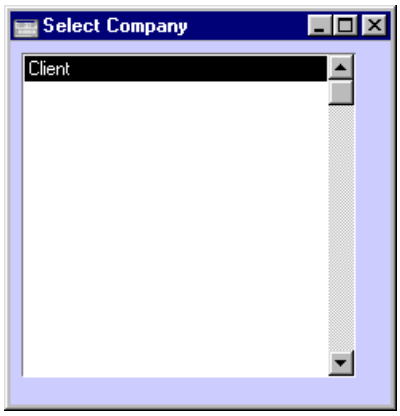
8. Change back to the System module and click the [Companies] button in the Master Control panel (or select ‘Companies’ from the Registers menu). Enter a second Company with the IP address of the server and Port Number that is the same as the Server Port in the Program Mode register on the server. The Code should be the same as that you entered on the server.



When you click [OK] to save, FirstContact will quit for reasons of security. The client machine is now configured to use the Local Mailbox system: repeat these steps for the other clients. You should then apply for an Enabler key for each client.

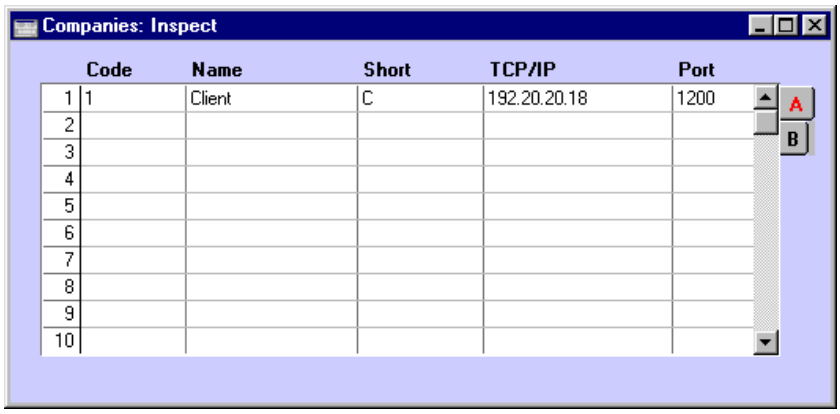
If you have been using FirstContact for some time before you start using the Local Mailbox Value Pack, you can still configure each client as described above, with these differences—

i. The database on the client machine will already contain a single Company, the “Client Company”. When you launch FirstContact, this Company will be shown in the ‘Select Company’ window—

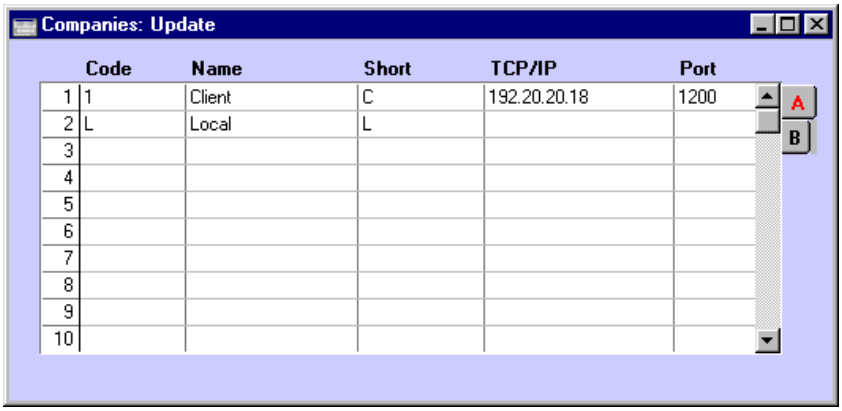


If the Login window appears instead of the ‘Select Company’ window, click [Cancel]. The ‘Select Company’ window will then appear.

ii. Select ‘Open Company Register’ from the Special menu. The ‘Companies: Inspect’ window opens—



iii. Enter the Local Company on the second row as shown—



iv. Click [OK] to save. FirstContact will quit for reasons of security. Restart FirstContact and choose to enter the Local Company. Complete steps 5, 6 and 7 as described above. The client machine is now configured to use the Local Mailbox system: repeat these steps for the other clients. You should then apply for an Enabler key for each client.

v. In some installations, you might not be able to save the 'Companies: Update' window when you click the [OK] button in step iv, because the number of Companies has been exceeded. In this situation, you should quit FirstContact, take the "1Contact.HDB" file out of the FirstContact folder and follow the sequence for a new client database from step 1 above. The only information that will be lost will be any custom window positions, sizes and/or sort orders that you might have saved using the 'Save Position' function on the Window menu.

Using Local Mailboxes

if you are using the Local Mailbox system, you will have two Mailboxes, as follows—

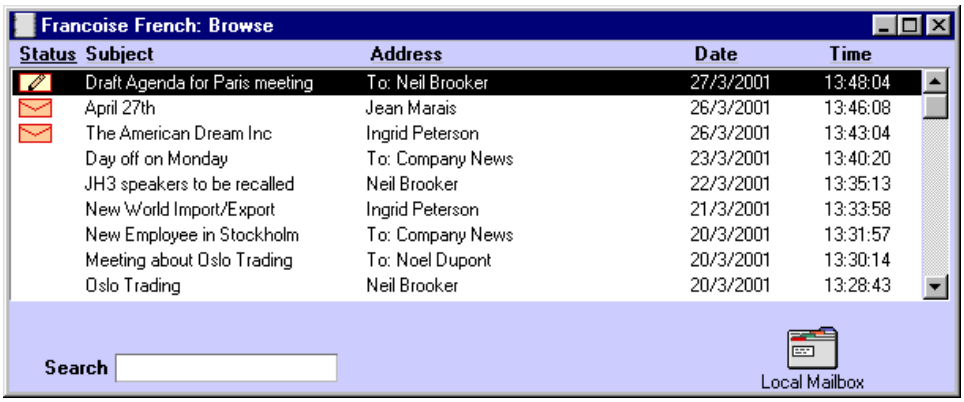
- your 'live' Mailbox. This is your normal Mailbox, used as described in Chapter 6, 'Mail'. It can only be used when you are logged in to the server, because it is stored there. As soon as you update a Mail in this Mailbox, it will appear as unread in its recipient's Mailbox.

- your 'local' Mailbox. This is stored in your client database, so you don't have to be logged in to the server in order to read and update its contents.

In this section, we describe the sequence that you might follow to read and edit Mail off-line in a typical FirstContact installation.

1. At the start of the day, launch FirstContact and choose the Client Company. This enables you to log in to the server.

2. Open your Mailbox by clicking the [Mailbox] button in the Master Control panel. Because the Local Mailbox Value Pack is present, your Mailbox has an extra button in the bottom right-hand corner—



   Urgent Mail can be dealt with now. Non-urgent Mail should be transferred to your Local Mailbox. To do this, click the [Local Mailbox] button: a new window entitled 'Local Mailbox: Browse' opens. This lists the contents of your Local Mailbox. If this is the first time you have opened your Local Mailbox, the list will be empty.

3. Select 'Synchronise' from the Special menu. The contents of your Mailbox will be transferred to your Local Mailbox. The 'pencil' and 'envelope' icons will be preserved, so that you can see which Mails need attention.

4. Log off from the server by quitting FirstContact.

5. During the day, you can launch FirstContact and choose the Local Company. Open your Mailbox by clicking the [Mailbox] button in the Master Control panel: the Mailbox will be empty. Click the [Local Mailbox] button: the 'Local Mailbox: Browse' window opens, showing the Mail that you transferred to your Local Mailbox in step 3 above.

6. Read and update Mail in the normal way, as described in the ‘Sending and Receiving Mail’ section in Chapter 6, ‘Mail’. There is one restriction on updating Mail: changes cannot be inserted into the Mail text, they must be added to the end of the text.

7. On returning to the office at the end of the day, you can once again launch FirstContact and select the Client Company to log in to the server. Open your Mailbox, click the [Local Mailbox] button and then select ‘Synchronise’ from the Special menu. All changed Mail will be transferred from your Local Mailbox to your ‘live’ Mailbox, and from your ‘live’ Mailbox to your Local Mailbox. If you updated a Mail in your Local Mailbox during the day at the same time as it was being changed by its recipient in your ‘live’ Mailbox, all changes will be preserved.

FirstContact Index

Index

%

%. *See* Discount *or* Percentage
% Adjustment
  Price Formulae, **411**

1

1Contact.HDB, 30

2

2001FCdemo38.txt
  Example Database, 28
  Importing and Logging In, 35

A

Access Group
  Conferences, **211**
  Mailboxes, **208**
  Persons, **367**
Access Groups
  and System Administrator, 202, 375
  Browse Window, 371
  System Module register, 81, **371**
Access Rights. *See* Access Groups
Access Rights for Conferences, 205, 208, 211
Active Users
  System Module setting, **346**
Activities
  Activity Type, **278**
  Appearing in Calendar, 268, 278, 282, 295
  Appearing in Personal Calendar, 296
  Appearing in To Do List, 288
  Approving, **278**, **283**
  Calendar options, **268**, **282**
  Cc, **278**
  Changing Activity Types, 349
  Comparing Actual and Planned, 335
  Comparing Profile with Target Time, 335
  Comparing Time with Target Time, 335
  Completing, **286**
  Compulsory Entry of Cost (Time), Customer and Result, 268
  Contact, **283**
  Correcting mistakes after marking as Done, 89, 279, 287
  Cost (Time), **281**
  Creating from Customer Letters, 271, 320
  Creating from Customers, 137
  Creating from other Registers, **284**
  Creating from Quotations, 184, 271
  Customer, **283**
  Determining Calendar Colour, 267
  Don't Show option, **282**
  Done check box, **278**
  End Date, **281**
  End Time, **281**
  Entering, **275**
  Generating from Previous Activities, 268
  Invalidating, 89, 279, 287
  Listing for each Customer, 330
  Listing for each Person, 389
  Notes, **284**
  Person, **277**
  Phone, **283**
  Printing, **327**
  Priority, **278**
  Private check box, **280**
  Profile option, **282**, 295
  Result, **283**
  Serial Number, **282**
  Showing in Calendar, **279**
  Showing in To Do List, **279**
  Start Date, **281**
  Start Time, **281**
  Text, **277**
  Time option, **282**, 295
  To Do check box, **279**
  Viewing, **275**
Activities, Customers
  Contact Module report, **330**
Activities, Persons
  System Module report, **389**

Activity
Contact Module document, **327**
Activity Classes
Calendar Colour, **267**
Code, **267**
Comment, **268**
Contact Module setting, **266**
Force Entry Of options, **268**
Activity Consequences
Contact Module setting, **268**
Activity Type
Activities, **278**
Activity Type List
Contact Module report, **332**
Activity Types
Class, **271**
Code, **271**
Comment, **271**
Contact Module setting, **270**
Printing List, 332
Activity Types, Subsystems
Contact module setting, 184, **271**, 320
Actual Time, 265. *See also* Activities
Add, 411
Add 2
Price Formulae, **411**
Address
Contact Persons, **324**
Customer Letters, **310**
Addressing Mail, **231**
Administrator. *See* System Administrator
Advanced Pricing, **408**
Alcohol %
Items, **155**
Amending Mail, **236**
Archive, 210
Attachments, 109, **238**
Changing Names, 112
Files, 110
Notes and Comments, 111
Reading, 111, 112
Record menu command, **90**
Records, 112
Removing, 113
Attachments Button, 109
Attention
Customers, **128**
Quotations, 128, **176**
Auto Connect Server IP
Program Mode, 357
Auto Connect Time
Program Mode, 357
Automatic
System Module Import function, **392**
Automatic, manual file search
System Module Import function, 64, **393**, 400

B

Backing Up, **56**, **396**
Automatic, **58**
Using Specialist Software, **60**
Back-up
Restoring from, 61, 393, 398
Bank 1, Bank 2
Company Info, **347**
Bank Account
Persons, **369**
Bank Customer ID
Company Info, 38, 347
Bank Name
Persons, **369**
Bar Code, 177
Items, **153**
Base Price
Date of Last Change, 154
Items, **154**, 158, 159, 408, 410
Base Price Change
Items, **154**
Base Registers
System Module Export function, **403**
Base Value
Price Formulae, **411**
Beep Others
Special menu command, Chat, **244**
Billboard, 210
Bonus %
Items, 176
Book Icon, 69, 96, 101
Browse Window, 95
Access Groups, 371
Buttons, 97, 368
Customer Letters, 304
Customers, 125
Items, 151
Persons, 366

Quotations, 172
Scrolling, 96
Searching, 96
Sorting Data, 96
Styles, 385
Use of Book Icon, 69, 96
Button Bar, **69**
Buttons, 70
Attachments, 109
Calendar, 71
Cancel, 70
Communicate, 72, **242**
Conferences, 72
Copy, 70
Hansaworld.com, 65, 73
in Browse Windows, 97, 368
Login, 73
Mailbox, 72, **228**
New, 70
OK, 70
Reports, 73
Settings, 73
The Book, 69, 96, 101
The Printer, 70
To Do, 73

C

Calculate Price Lists
Contact Module function, 409, 412, **414**, 418
Calendar, **290**
Activities appearing in, 268, 278, 282, 295
Booking Future Time, 282
Daily View, 294
Defining Week Numbers, 363
Determining Colour of Activities, 267
Entering Activities from, 275, 295
Monthly View, 292
Opening, **290**
Showing Activities in, **279**
Showing Time Spent, 282
Six-monthly View, 291
Week Numbers are missing, 295
Weekly View, 293
Calendar Button, 71
Calendar Colour
Activity Classes, **267**
Calendar options
Activities, **268**, **282**
Call Sheets, 175
Cancel
Record menu command, **88**
Cancel Button, 70
Category
Customer Letters, **310**
Cc
Activities, **278**
Change History. *See* History
Change Password
Special menu command, Customers, 131, **135**
Special menu command, Persons, **369**
Changed Date
Customers, **128**
Character Set
Company Info, **348**
Chat, **242**
Beeping Other Participants, **244**
Inviting Other Users, **243**
Leaving, **243**
Listing Participants, **244**
Special Menu, **243**
Starting, **242**
Class. *See* Classification. *See* Classification
Activity Types, **271**
Classification
Contact Persons, **325**
Customers, 120, **129**
Classification Types
Contact Module setting, **118**
Clean Up Mail Registers
Technics Module function, 208, 213, 214, 229, **246**
Client
Logging on, 48
Client Company, 443, 446
Client Text Backup
System Module Export function, **401**
Closed check box
Contact Persons, **323**
Customers, **131**
Items, **153**
Quotations, **174**
Closing FirstContact, **53**
Code
Activity Classes, **267**

Activity Types, **271**
Company, 33
Currencies, **431**
Payment Terms, **124**
VAT Codes, **362**
Comment
Activity Classes, **268**
Activity Types, **271**
Customers, **133**
Persons, **369**
Quotations, **181**
Comments
Attaching to Records, 111
Reading, 112
Removing, 113
Commodity/EAN Code
Items, **153**
Communicate Button, 72, **242**
Companies
Adding, 40
Changing, 365
Creating, 32
Encryption Key, **45**, **49**
Number of, 40
Reporting on, 390
System Module register, 32, 40, 45, 49, 76, **364**
Transferring Information by Dragging and Dropping, 101
Company, **30**
Code, 33
File menu command, 45, **76**
Name, 33
Opening, 31
Opening Automatically on Start Up, 47
Port, 49
Selecting, 34, 45, 49, 76
Short, 33
TCP/IP, 49
Company Box, 34, 37, **71**
Company Info
Bank 1, Bank 2, **347**
Bank Customer ID, 38, 347
Character Set, **348**
Country, 348
Edit Font, 38, **348**
Exporting, 401
Report Font, 38, **348**
Report Font Size, **348**
System Module report, **390**
System Module setting, 37, **347**
VAT Law, **348**
VAT Law Code, 39
Company Name
Changing, 37
Company Registration Number. *See* Registration Number
Company Text Backup
System Module Export function, **396**
Conferences, **209**
Access Group, **211**
Deleting, **212**
Giving Access to, 205, 208, 211
Listing those without E-Mail Aliases, 249
Modifying, **212**
Mother, 211
Nested Structure, 211
Reading Mail in, 233
Removing Old Mail, 246
Removing Old Mail Automatically, 248
Sending Mail to, 233
Serial Number, 208
Conferences Button, 72
Connecting to POP3 Accounts, 216
Connecting to SMTP Accounts, 224
Contact
Activities, **283**
Customer Letters, **307**
Contact Classification
Customer Letters, **311**
Contact Date. *See* Make Contact Date
Contact List
Contact Module report, **333**
Contact Persons
Address, **324**
Classification, **325**
Closed check box, **323**
Contact Module register, 128, **322**
Customer, **323**
Department, **323**
Exporting, 403
Job Description, **325**
Name, **323**
Printing List, 333
Title, **325**

Contacts. *See* Attention *and* Contact Persons
  Creating from Customers, 136
Contents of FirstContact Directory/Folder, 27
Continuous Stationery, 381
Control String
  System Usage, 42
Conversion 1 and 2
  Items, **155**
Conversions - Activity Types
  System Module setting, **349**
Conversions - Customers
  System Module setting, **351**
Conversions - Master
  System Module setting, **349**, **351**
Copies
  Printing Several, 83
  Special menu command, Forms, **381**
Copy
  Edit menu command, **86**
Copy Button, 70
Copying Records, 98, 108
Cost (Time)
  Activities, **281**
  Forcing Entry of, in Activities, 268
Cost Price
  Date of Last Change, 156
  Items, **156**, 158, 408
  Quotations, **179**
Country
  Company Info, 348
Create Activity
  Special menu command, Customer Letters, **320**
  Special menu command, Quotations, **184**
Create Mail
  Special menu command, Quotations, 170, **186**
Creating Records, 97, 108
Creation Date
  Customers, **128**
Currencies, **430**
  Code, **431**
  Defining Names for Use in Documents, 432
  Gender, **432**
  Minor Currency Name, **432**
  Name, **431**
  Rounding Off, 433
  Rounding Rules, 430
  Setting Rounding Rules, 180, **431**
  System Module setting, 412, **430**
  Value in Text Name, **432**
Currency
  Customers, 432
  In Quotations, 432
  Price Lists, **412**
Current Record, 108
Customer
  Activities, **283**
  Contact Persons, **323**
  Customer Letters, **306**
  Forcing Entry of, in Activities, 268
  Quotations, **174**
Customer Categories
  Contact Module setting, **119**, 127
  Discount Matrix, 424
  Exporting, 403
  Price List, **119**, 159, 410
Customer Category
  Customers, **127**
Customer Classification
  Customer Letters, **310**
Customer Classifications
  Contact Module setting, **120**, 129
Customer Details
  Updating in Quotations, 188
Customer Labels
  Contact Module document, **140**
Customer Letter
  Sales Support module document, **328**
Customer Letter Number
  Defining Sequences, 272
Customer Letters
  Address, **310**
  Approving, **311**
  Browse Window, 304
  Category, **310**
  Contact, **307**
  Contact Classification, **311**
  Contact module register, **304**
  Customer, **306**
  Customer Classification, **310**
  Date, **306**
  Defining Number Sequences, 272
  Document, **308**
  Email, 310
  Entering, **304**
  Fax, 310

Generating Activities from, 320
Job Description, **311**
Number, **305**
OK check box, **306**
One per Contact check box, **307**
Printing, **312**
Sending by Email, 320
Standard Text, **309**
Time, **306**
Customer List
Contact Module report, **143**
Customer Name
Customers, **127**
Customer Number
Customers, **126**
Customer Status
Special menu command, Customers, 121, **134**
Customer Status Report
Contact Module setting, **121**, 134
Customers
Attention, **128**
Browse Window, 125
Changed Date, **128**
Changing Customer Number, 351
Classification, 120, **129**
Closed check box, **131**
Comment, **133**
Contact Module register, **125**
Creation Date, **128**
Currency, 432
Customer Category, **127**
Customer Name, **127**
Customer Number, **126**
Deleting, **134**
Delivery Address, **129**
Delivery Mode, **131**
Delivery Terms, **131**
Discount Matrix, 424
Editing, **133**
Email, **133**
Entering, **126**
Exporting, 403
Fax Number, **129**
FTP Access check box, 52, **131**
Generating Activities from, 137
Generating Contacts from, 136
Generating Mails from, 127
Generating Quotations from, 127
Invoice Address, **128**
Invoice To, **131**
Language, **433**
Limited Access, 125, 130
Listing Activities, 330
Mailing, **304**
Password, 131, **135**
Payment Terms, **130**
Price List, **132**, 159, 410
Registration Number, **132**
Sales Group, **130**
Salesman, **130**
Sending Quotations by email, 170, 186
Short Code, **127**
Sort Key, **127**
Telephone Number, **129**
Their Supplier Code, **133**
VAT Code, **132**
VAT Registration Number, **131**
Warning, **133**
WWW Address, **133**
Zone, **132**
Customers with no Activities
Contact Module report, **334**
Cut
Edit menu command, **85**

D

Daily Call Sheets, 175
Data
Exporting, 76
Importing, 77
Database, **30**
Creating, 32
Creating (Multi-user), 45
Creation does not follow steps in manual, 44
Opening, 31
Database Backup Path
Timed Operations, 59
Database Backup Time
Timed Operations, 59
Database Closing Time
Timed Operations, 61
Database key, 42
Database Opening Time
Timed Operations, 61

Database Text Backup
System Module Export function, **396**
Date
Customer Letters, **306**
Quotations, **175**
Date Last Modified. *See* Changed Date
Date of Last Base Price Change
Items, 154
Date of Last Cost Price Change
Items, 156
DBDef.txt, **32**
Decimal Places. *See* Round Off *and* Rounding Rules. *See* Round Off *and* Rounding Rules
Default Company
Program Mode, 47
Defaults
Price List, 161, 417
Price List for Customers, 119, 127
Reporting Period, 360
VAT Code for Items, 149, 153, 154
VAT Code for Sales, 132
Deleting Mail, **241**, 246
Deleting Mail Automatically, 248
Deleting Records, 109
Delivery Address
Customers, **129**
Quotations, **182**
Delivery Methods. *See* Delivery Modes
Delivery Mode
Customers, **131**
Delivery Modes
Changing to reflect Language of Customer, 435
Contact Module setting, **122**, 131
Using to Determine layout of Quotation documents, 437
Delivery Terms
Changing to reflect Language of Customer, 435
Contact Module setting, **123**, 131
Customers, **131**
Department
Contact Persons, **323**
Department (of your company). *See* Companies
Depth
Items, **154**
Description
Items, **153**
Price Lists, **160**, **412**
VAT Codes, **363**
Destination
Specifying when Printing Reports, 79
Discount
Price Lists \b, 412
Quotations, **178**, 360
Recalculating in Quotations, 428
Discount Bands, 425
Discount Calculation Method, 178, **360**
Discount Matrices
Contact Module setting, 424, **426**, 428
Discount Matrix
Customer Categories, 424
Customers, 424
Disk Space, 74
Document
Customer Letters, **308**
Documents
Defining, 80
Documents, **80**
Activities, **327**
Adjusting Page Setup/Magnification, 83
Changing to reflect Delivery Mode of Quotations, 437
Changing to reflect Language of Quotation, 436
Customer Labels, **140**
Customer Letter, **328**
Defining Names of Currencies, 432
Placing in a Print Queue, 84
Printing more than one Copy, 83
Printing to Specific Printers, 354
Quotations, 191
Don't Show option
Activities, **282**
Done check box
Activities, **278**
Drag and Drop
Using to Copy Data between Companies, 101
Using to Insert Data into Fields, 101
Drill-down in Reports, 104
Drill-down reports
Activities, Customers, 330
Activities, Persons, 389
Customer Status, 135
Customers with no Activities, 334
Personal Calendar, 296

Quotation Stock, 195
To Do List, 288

E

Edit Font
Company Info, 38, **348**
Edit Menu, 85
Copy, **86**
Cut, **85**
Elapsed Time. *See* Cost (Time)
Email. *See* External Mail
Customer Letters, 310
Customers, **133**
E-Mail. *See* External Mail
Email Address
Persons, **204**, **369**
Email Addresses
Use of Special Characters, **218**
E-Mail Aliases
External Gateway register, **218**
Printing a List, 249
Technics Module report, **249**
E-Mail POP3 Servers
External Gateway register, **216**
E-Mail SMTP Servers
External Gateway register, **224**
Employee Planned Time
Contact Module report, **335**
Employees
Comparing Actual and Planned Hours Worked, 335
Enabler
System Module setting, **43**, 351
Encryption Key
Companies, **45**, **49**
End Date
Activities, **281**
End Time
Activities, **281**
Entering Records, 97, 108
Entry Date. *See* Creation Date
Envelope Icon, **229**
Error Messages
Already Registered, 160, 417
User Limit on Server reached, 49
Escape Sequence, 378
Example Database, 28
Importing and Logging In, 35
Excl %
VAT Codes, **363**
Exclude from page options
Forms, 382
Exporting Data, 76
Exporting Reports to Disk, 115
Exports
Base Registers, **403**
Client Text Backup, **401**
Company Text Backup, **396**
Database Text Backup, **396**
Item Base Registers, **403**
Raw Data, **404**
Run Timed Backup, **404**
System Data, **401**
External Gateway
Backing Up, **225**
External Gateway module, **215**
External Mail, 200, **215**
Attachments, 238
Connecting to Mailboxes, 218
Frequency of checking for, 215
in a Single-User Installation, **226**
Incoming, 216
Incoming with incorrect address, 214
Outgoing, 224
Replying to, 236
Sending, **232**
Extra Cost
Items, **156**

F

Fax
Customer Letters, 310
Fax Number
Customers, **129**
Quotations, **182**
Fax Server
Setting Up, 438
Fax Settings
Technics Module setting, **439**
FCdemo.txt
Example Database, 28
Importing and Logging In, 35

Fields
in Forms, 378
Moving between, 98
File Dialogue Window, 107
File Menu, **75**
Company, 45
Documents, **80**
Imports, **77**
Page Setup, **83**
Print, 70, **84**
Print Queue, **84**
Reports, **78**
Settings, 37, **82**
File Transfer Protocol. *See* FTP
Files. *See* Registers
Attaching to Records, 110
Making Available to FTP Clients, 51
Reading, 111
Removing, 113
First Only
Special menu command, Forms, **383**
FirstContact
Closing Down, **53**
Importing process appears to fail, 63, 400
Installation, **22**
Keyboard Commands, 75, 116
Starting, **30**
Structure of Registers, 18
Upgrading from Previous Versions, 65
Work Area, 68
FirstContact Directory
Contents, 27
FirstContact Folder
Contents, 27
Flips, 99
Folder, 211
Fonts
Setting for Reports, 38
Force Entry Of options
Activity Classes, **268**
Forms. *See also* Documents
Defining Names of Currencies, 432
Defining Type Styles, 385
Exclude from page options, 382
Exporting, 403
Fields, 378
Frames, 378
Lines, 378
Naming, 380
Pictures, 379
Printing, 383
Printing a specific number of copies automatically, 381
Printing on Continuous Stationery, 381
Single- and Multi-page, 382
System Module register, 80, 82, **376**
Text Objects, 377
Forms Editor, **376**
Frames
in Forms, 378
FTP Access check box
Customers, 52, **131**
Persons, 52, **367**
FTP Customers
Allocating Passwords to Customers, **135**
Allowing to Log In, 52, 131
FTP Port
Program Mode, 51
FTP Server
Setting Up, 50
FTP Shared Directory
Program Mode, 51
FTP Users
Allowing to Log In, 52, 367, 369

G

Gateway
Backing Up, **225**
Gender
Currencies, **432**
GP. *See* Gross Profit
Gross Profit
Including Carriage, etc, 156
Quotations, **179**

H

Hansa
Website, 65, 73
Hansaworld.com, 65
Hansaworld.com Button, 73
HDB File, 30
Height
Items, **154**

Hierarchical Structure of Conferences, 211
History
  Record menu command, **90**
  Special menu command, Mail, **237**
History of Mails, **237**
  Printing, 250

I

Importing Files
  Process Appears to Fail, 63, 400
Imports
  Automatic, **392**
  Automatic, manual file search, 64, **393**, 400
  File menu command, **77**
Incl %
  VAT Codes, **363**
Incoming External Mail, 216
  Connecting to Mailboxes, 218
  Frequency of checking for, 215
  in a Single-User Installation, 226
  Incorrectly addressed, 214
Initials. *See* Signature
Installation, **22**
  Macintosh Single-user, 26
  Windows Single-user, 23
Invalidate
  Record menu command, **89**, 279, 287
Invite
  Special menu command, Chat, **243**
Invoice Address
  Customers, **128**
  Quotations, **181**
Invoice To
  Customers, **131**
Item Base Registers
  System Module Export function, **403**
Item Code
  Price Lists, **413**
Item Details
  Updating in Quotations, 188
Item Group
  Items, **153**
Item Groups
  Contact Module setting, **148**, 153, 413, 429
  Deleting, **149**
  Exporting, 403
  VAT Code, **149**
Item List
  Contact Module report, **162**
Item Number
  Items, **152**
  Quotations, **177**
Items
  Alcohol %, **155**
  Bar Code, **153**, 177
  Base Price, **154**, 158, 159, 408, 410
  Base Price Change, **154**
  Bonus %, 176
  Browse Window, 151
  Changing to reflect Language of Customer, 435
  Closed check box, **153**
  Commodity/EAN Code, **153**
  Contact Module register, **151**
  Conversion 1 and 2, **155**
  Cost Price, **156**, 158, 408
  Deleting, **157**
  Depth, **154**
  Description, **153**
  Entering, **151**
  Exporting, 403
  Extra Cost, **156**
  Height, **154**
  Item Group, **153**
  Item Number, **152**
  Price Change, **156**
  Price Factor, **153**
  Unit, **153**
  VAT Code, **154**
  Volume, **155**
  Warning, **156**
  Warranty Months, **154**
  Weight, **154**
  Width, **154**

J

Job Description
  Contact Persons, **325**
  Customer Letters, **311**
  Persons, **369**
Job Descriptions
  Contact Module setting, **272**

K

Key, 42
Keyboard Shortcuts, 75, 116

L

Labels
  Printing for Customers, 140
  Printing Static Text, 142
Language
  Customers, **433**
Languages, **430**
  System Module setting, 433, **434**
  Using to determine layout of Quotation documents, 436
  Using to Determine text for Delivery Modes, 435
  Using to Determine text for Delivery Terms, 435
  Using to Determine text for Items, 435
  Using to Determine text for Payment Terms, 435
  Using to Determine text for Units, 435
Last Only
  Special menu command, Forms, **383**
Launching FirstContact, **30**
  Importing process appears to fail, 63, 400
Leasing Companies. *See also* Factoring, Customers
Letter List
  Contact Module report, **338**
  Special menu command, Customer Letters, **320**
Letters
  Designing, 312
  Determining Letter Text, 309
  Determining Recipients, 306, 310
  Printing, **312**
  Sending by Email, 320
  Sending to Customers, **304**
  Superimposed Text, 239, 315
  Viewing Text and Recipients, 320, 338
Lifetime of Mails, 208, 213, 229, 246
Limited Access, 97, **368**
  Customers, 125, 130
  Persons, **368**
  Quotations, 172, 180
Lines
  in Forms, 378
List Window, 105
Loading FirstContact, **30**
  Importing process appears to fail, 63, 400
Local Company, 443
Locked check box
  Mail, **230**
Locking Mail, **230**
Logging Control
  Technics Module setting, 90
Logging on to a Server, 48
Login Button, 73
Lookup Table
  Using to Insert Data into Fields, 99

M

Macintosh
  Multi-user Installation, 26
  Single-user Installation, 26
  System Requirements, 23
Mail
  Addressing, **231**
  Amending, **236**
  Attachments, **238**
  Deleting, **241**, 246
  Deleting Automatically, 248
  Lifetime, 208, 213, 229, 246
  Locked check box, **230**
  Marking as not read, **238**
  Preventing Changes, 230
  Printing, **239**
  Printing History, 250
  Priority check box, **230**
  Reading and Changing off-line, **442**
  Receiving, **228**
  Recipients, **231**
  Replying to, **236**
  Saving, **240**
  Sending, **228**, 230, **231**
  Sending to Conferences, 233
  Sent check box, **230**, 231
  Serial Number, 231
  Viewing History, **237**
Mail Access Groups
  Technics Module setting, **205**, 208, 211

Mail History
System Module report, **250**
Mail Settings
Technics Module setting, **213**
Mail System
Setting up, **200**
Mailbox Button, 72, **228**
Mailboxes
Access Group, **208**
Connecting to Incoming External Mail, 218
Creating, **206**
Deleting, **209**
Listing those without E-Mail Aliases, 249
Maximum Number of Mails, 208, 213
Modifying, **209**
Removing Old Mail, 246
Removing Old Mail Automatically, 248
Serial Number, 208
Technics Module setting, **206**
Mailing Customers and Contacts, **304**
Determining Letter Text, 309
Determining Recipients, 306, 310
Mailmerge. *See* Mailing Customers and Contacts
Mails
Creating from Customers, 127
Creating from Quotations, 170, 186
Maintenance functions
Calculate Price Lists, 409, 412, **414**, 418
Clean Up Mail Registers, 208, 213, 214, 229, **246**
System Message, **53**
Update Quotations, **188**
Maintenance Window, 78
Make Contact Date
Quotations, **175**
Mark as not read
Special menu command, Mail, **238**
Master Control
File menu command, **76**
Master Control Panel, **71**
Calendar Button, 71
Communicate Button, 72, **242**
Conferences Button, 72
Hansaworld.com Button, 65, 73
Login Button, 73
Mailbox Button, 72, **228**
Opening, 76
Reports Button, 73
Settings Button, 73
To Do Button, 73
Max FTP Users
Program Mode, 51
Maximum Number of Mails, 208, 213
Menus
Edit, 85
File, **75**
Record, 87
Special, 93, 99
Window, 93
Messages
Sending to all users, 53
Middle Only
Special menu command, Forms, **383**
Minor Currency, 432
Minor Currency Name
Currencies, **432**
Modified Date. *See* Changed Date
Modifying Records, 97
Modules
Granting Access to, 40
Server, 45
System, 37, **346**
Technics, **202**
Modules Menu, 92
Mother
Conferences, 211
Mother Folder, **211**
Multi-company Capability, 30
Multi-page Forms, 382

N

Name
Company, 33
Contact Persons, **323**
Currencies, **431**
Name of Company
Changing, 37
Names of Attachments
Changing, 112
Names of Currencies
Defining for Use in Documents, 432
Nested Structure of Conferences, 211
Network
Logging on, 48

New Activity
Special menu command, Customers, **137**
New Button, 70
New Contact
Special menu command, Customers, **136**
News, 210
Next Contact Date. *See* Make Contact Date
Notes
Activities, **284**
Attaching to Records, 111
Reading, 112
Removing, 113
Number
Customer Letters, **305**
Number of Users, 40
Number Series - Customer Letters
Contact Module setting, **272**, 305
Number Series - Quotations
Contact Module setting, **168**, 174

O

OK Button, 70
OK check box
Customer Letters, **306**
One per Contact check box
Customer Letters, **307**
Options List
Using to Insert Data into Fields, 99
Our Reference
Persons, 176
Quotations, **176**
Outgoing External Mail, 224
in a Single-User Installation, 226
Overview Window. *See* Browse Window

P

Page Setup
for Reports, 79
Paper Clip. *See* Attachments
Password
Customers, **131**, **135**
Persons, **369**
Payment Terms
Changing to reflect Language of Customer, 435
Code, **124**
Contact Module setting, **123**, 130
Customers, **130**
Exporting, 401
Quotations, **175**
Text, **124**
PC Printer
Special menu command, Forms, **381**
Pencil Icon, **229**
Period
Price Lists, **160**, **412**
Periods. *See* Reporting Periods
Person
Activities, **277**
Person List
System Module report, **391**
Personal Calendar
Activities appearing in, 296
Entering Activities from, 275, 297
Printing, 297
Personal Calendar Report, **296**
Persons
Access Group, **367**
Bank Account, **369**
Bank Name, **369**
Browse Window, 366
Comment, **369**
Comparing Actual and Planned Hours Worked, 335
Creating Mailboxes for, 206
Email Address, **204**, **369**
Exporting, 403
FTP Access check box, 52, **367**
Job Description, **369**
Limited Access, **368**
Listing Activities, 389
Our Reference, 176
Password, **369**
Printing a List, 391
Sales Group, **368**
Signature, **367**
Specification, **369**
System Module register, 49, 130, 176, **366**
Phone
Activities, **283**
Pictures
in Forms, 379

Planned Time, 265. *See also* Activities
POP3 Accounts. *See* E-Mail POP3 Servers
Port
  Company, 49
  Program Mode, 357
Post Office Protocol version 3. *See* E-Mail POP3 Servers
Preferences. *See* Settings
Presentation
  Special menu command, Mail, **245**
Presentations, **245**
  and System Administrator, 245
  Entering, **245**
  Reading, **245**
  Technics Module setting, **245**
Price Change
  Items, **156**
Price Factor
  Items, **153**
  Quotations, **179**
  Use in Pricing Quotations, 179
Price Formula
  Price Lists, **413**
Price Formula Code
  Price Formulae, **411**
Price Formula Name
  Price Formulae, **411**
Price Formulae
  % Adjustment, **411**
  Add 1, **411**
  Add 2, **411**
  Base Value, **411**
  Contact Module setting, 409, **410**, 413
  Exporting, 403
  Price Formula Code, **411**
  Price Formula Name, **411**
  Round Off, **411**
  Setting Up, **410**
Price List
  Contact Module report, 161, **163**, 417
  Customer Categories, **119**, 159, 410
  Customers, **132**, 159, 410
  Exporting as a Text File, 163
  Printing, **163**
  Quotations, **180**
  Setting Default, 161, 417
  Setting Default for Customers, 119, 127
  Use in Pricing Quotations, 180
Price List Code
  Price Lists, **159**, **412**
Price Lists, **158**
  Advanced Features, **408**
  Calculating, 409, 412, **414**, 418
  Calculating Prices for, 413
  Contact Module setting, 119, 158, **159**, 180, 409, **411**
  Currency, **412**
  Description, **160**, **412**
  Exporting, 403
  Inclusive or Exclusive of VAT, **160**, **412**
  Item Code, **413**
  Period, **160**, **412**
  Price Formula, **413**
  Price List Code, **159**, **412**
  Printing, 161, 417
  Row Type, **414**
  Setting Up, **159**, **411**
  Structure, **158**, **408**
  Type, **412**
  Updating, **415**
Prices
  Advanced Features, **408**
  Calculating for Price Lists, 413
  Contact Module setting, **158**, **160**, **414**
  Exporting, 403
  Setting up Multiple Price Lists, **158**
Pricing of Quotations
  Selecting Discount, 178, 360, 428
  Selecting Price Factor, 179
  Selecting Price List, 180
  Selecting Unit Price, 178
  Updating, 188
Print
  File menu command, 70
Print Destination
  Specifying for Reports, 79
Print Queue, **84**
Print Server
  Setting Up, 355
Print Server Port
  Program Mode, 357
Print Spool. *See* Print Queue
Printer
  Specifying when Printing Reports, 79
Printer Dialogue
  Appearing before Printing Reports, 79

Printer Icon, 70
Printers
  System Module setting, 82
Printing
  Forms, 383
Printing Mail, **239**
Printing Reports, 103
Priority
  Activities, **278**
Priority check box
  Mail, **230**
Private check box
  Activities, **280**
Probability
  Quotations, **176**
Profile Activities, 265. *See also* Activities
Profile option
  Activities, **282**, 295
Profiles. *See* Presentations
Program Mode
  Auto Connect Server IP, 357
  Auto Connect Time, 357
  Default Company, 47
  FTP Port, 51
  FTP Shared Directory, 51
  Max FTP Users, 51
  Port, 357
  Print Server Port, 357
  Program Name, 47
  Server at Startup check box, 47
  Server Port, 47, 49, 356
  Technics Module register, 46
Program Name
  Program Mode, 47
Properties
  Special menu command, Forms, **380**

Q

Quantity
  Quotations, **178**
Quantity Breaks, 425
Quantity Dependent Discounts
  Contact Module setting, 424, **425**, 427, 429
Quantity Dependent Prices
  Contact Module setting, **414**
Quantity Dependent Values
  Price Lists, **412**
Quantity Discounts, 414, **424**
Quitting FirstContact, **53**
Quotation
  Contact Module document, 191
Quotation Class
  Quotations, **176**
Quotation Classes
  Contact Module setting, **169**
Quotation Date. *See* Date
Quotation Journal
  Contact Module report, **193**
Quotation Mail
  Contact Module setting, **170**
Quotation Number
  Defining Sequences, 168
  Quotations, **174**
Quotation Rows
  Converting Prices to Currency, 433
Quotation Stock
  Contact Module report, **195**
Quotations
  Adding/Removing/Inserting Rows, 177
  Attention, 128, **176**
  Browse Window, 172
  Closed check box, **174**
  Comment, **181**
  Contact module register, **172**
  Cost Price, **179**
  Creating Activities from, 271
  Creating from Customers, 127
  Customer, **174**
  Date, **175**
  Defining Number Sequences, 168
  Delivery Address, **182**
  Discount, **178**, 360
  Estimating Success, 176
  Fax Number, **182**
  Following Up, 184
  Generating Activities from, 184
  Generating Mails from, 170, 186
  GP%, **179**
  Gross Profit, **179**
  In Currency, 432
  Including Subtotals, 184
  Invoice Address, **181**
  Item Number, **177**
  Limited Access, 172, 180
  Make Contact Date, **175**

Our Reference, **176**
Payment Terms, **175**
Price Factor, **179**
Price List, **180**
Printing, 191
Printing a List, 195
Printing for different Delivery Modes, 437
Printing in different Languages, 436
Probability, **176**
Quantity, **178**
Quotation Class, **176**
Quotation Number, **174**
Recalculating Discount, 428
Sales Group, **180**
Salesman, 130, **176**
Sending to Customers by email, 170, 186
Setting Rounding Rules for rows in Currency, 431
Setting Rounding Rules for Total, 180, 360
Setting Rounding Rules for Total in Currency, 431
Setting Rounding Rules for VAT, 179, 360
Setting Rounding Rules for VAT in Currency, 432
Subtotal, **179**
Sum, **178**
Telephone Number, **182**
Total, **180**
Total GP, **179**
Unit Price, **178**
Updating Item, Pricing and Customer details, 188
Valid Until Date, **175**
VAT, **179**
VAT Code, **178**
VAT Registration No, **182**
Zone, **181**

R

Raw Data
System Module Export function, **404**
Recalculate
Special menu command, Reports, 103
Recalculate Discount
Special menu command, Quotations, 428
Receiving Mail, **228**
Recipients
Mail, **231**
Record Menu, 87
Attachments, **90**
Cancel, **88**
History, **90**
Invalidate, **89**, 279, 287
Record Window, 98
Moving from field to field, 98
Use of Book Icon, 69, 101
Records
Attaching Files, 110
Attaching Notes and Comments, 111
Attaching other Records, 112
Copying, 88, 98, 108
Creating, 88, 97, 108
Current, 108
Deleting, 89, 109
Modifying, 97
Opening Attached Records, 113
Reading Attached Files, 111
Reading Notes and Comments, 112
Removing Attachments, 113
Viewing History, 90
Registers
Access Groups, 81, **371**
Activities, **275**
Companies, 32, 40, 45, 49, 76, **364**
Contact Persons, 128, **322**
Customer Letters, **304**
Customers, **125**
E-Mail Aliases, **218**
E-Mail POP3 Servers, **217**
E-Mail SMTP Servers, **224**
Forms, 80, 82, **376**
Items, **151**
Persons, 49, 130, 176, **366**
Program Mode, 46
Quotations, **172**
Structure of, 18
Styles, **385**
Registers Menu, 91
Registration Defaults
Contact Module setting, 132
Registration Number
Customers, **132**

Removing Attachments, 113
Reply
  Special menu command, Mail, **236**
Replying to Mail, **236**
Report Font
  Company Info, 38, **348**
Report Font Size
  Company Info, **348**
Report Window, 102
Reporting Period
  Setting Default, 360
Reports
  Printing, 103
Reports, 115
  Activities, Customers, **330**
  Activities, Persons, **389**
  Activity Type List, **332**
  Adjusting Page Setup/Magnification, 83
  Company Info, **390**
  Contact List, **333**
  Customer List, **143**
  Customer Status, 134
  Customers with no Activities, **334**
  Drill-down, 104
  E-mail Aliases, **249**
  Employee Planned Time, **335**
  Exporting, 115
  Item List, **162**
  Letter List, **338**
  Mail History, **250**
  Page Setup, 79
  Person List, **391**
  Personal Calendar, **296**
  Placing in a Print Queue, 84
  Price List, 161, **163**, 417
  Printing more than one Copy, 83
  Printing to Screen, 115
  Printing to Specific Printers, 352
  Quotation Journal, **193**
  Quotation Stock, **195**
  Recalculating, 80, 103
  Saving to Disk, 115
  Searching in, 103
  Selecting Print Destination, 79
  Setting Fonts, 38
  Specifying Printer, 79
  Specifying Printer Dialogue, 79
  Telephone List, **339**
  To Do List, **288**
  Use of Book Icon, 70
Reports Button, 73
Restoring from a Back-up, 61, 393, 398
  Appears to Fail, 63
  Process Appears to Fail, 400
Result
  Activities, **283**
  Forcing Entry of, in Activities, 268
Round Off
  Price Formulae, **411**
  System Module setting, 179, 180, **360**
Rounding
  Defining Rules for Different Currencies, 430
Rounding Off
  Currencies, 433
Rounding Rules
  Setting for Quotation Total, 360
  Setting for rows in Currency, 431
  Setting for Total, 180
  Setting for Total in Currency, **431**
  Setting for VAT, 179, 360
  Setting for VAT in Currency, 432
Row Type
  Price Lists, **414**
Rows
  Adding/Removing/Inserting to Quotations, 177
Run Timed Backup
  System Module Export function, **404**

S

Safety Back-up, 56
  Automatic, 58
  Restoring from, 61
Sales Group
  Customers, **130**
  Persons, **368**
  Quotations, **180**
Salesman
  Customers, **130**
  Quotations, 130, **176**
Save Text as File
  Special menu command, Mail, **240**
Saving Mail, **240**
Scrolling
  in a Browse Window, 96

Searching
in a Browse Window, 96
using a Wildcard, 96
Select Company Window
Bypassing, 47
Selection List
Using to Insert Data into Fields, 99
Send and Receive E-mail
Special menu command, Master Control panel, **232**
Send E-mail
Special menu command, Mail, **232**
Send email
Special menu command, Customer Letters, **320**
Send to Back
Special menu command, Forms, **381**
Sending External Mail, **232**
Sending Mail, **228**, 230, **231**
Sending Mail to Conferences, 233
Sent check box
Mail, **208**, **230**, 231
Serial Number
Activities, **282**
Mail, 231
Mailboxes and Conferences, 208
Server
Logging on to, 48
Starting up, 365
Server at Startup check box
Program Mode, 47
Server module
Allowing Access, 45
Selecting by Default, 47
Setting up, **45**
Server Port
Program Mode, 47, 49, 356
Settings, **36**, 73, 82
Active Users, **346**
Activity Classes, **266**
Activity Consequences, **268**
Activity Types, **270**
Activity Types, Subsystems, 184, **271**, 320
Classification Types, **118**
Company Info, 37, **347**
Conversion - Activity Types, **349**
Conversion - Customers, **351**
Conversions - Master, **349**, **351**
Currencies, 412, **430**
Customer Categories, **119**, 127
Customer Classifications, **120**, 129
Customer Status Report, **121**, 134
Delivery Modes, **122**, 131
Delivery Terms, **123**, 131
Discount Matrices, 424, **426**, 428
Enabler, **43**, 351
Exporting Contents, 401
Fax Settings, **439**
File menu command, 37, **82**
Item Groups, **148**, 153, 413, 429
Job Descriptions, **272**
Languages, 433, **434**
Logging Control, 90
Mail Access Groups, **205**, 208, 211
Mail Settings, **213**
Mailboxes, **206**
Number Series - Customer Letters, **272**, 305
Number Series - Quotations, **168**, 174
Payment Terms, **123**, 130, 175
Presentations, **245**
Price Formulae, 409, **410**, 413
Price Lists, 119, 158, **159**, 180, 409, **411**
Prices, **158**, **160**, **414**
Printers, 82
Quantity Dependent Discounts, 424, **425**, 427, 429
Quantity Dependent Prices, **414**
Quotation Classes, **169**
Quotation Mail, **170**
Registration Defaults, 132
Round Off, 179, 180, **360**
Standard Texts, **273**
System module, 36
System Usage, **40**, 45, 361
Target Time, **298**
Text Types, **274**
Timed Operations, 59, 60, 248
Units, **150**, 153
VAT Codes, 132, 149, 154, 178, **362**
Weeks, **363**
Settings Button, 73
Shipping Terms. *See* Delivery Terms
Short
Company, 33

Short Code
Customers, **127**
Shutting FirstContact Down, **53**
Signature
Persons, **367**
Simple Mail Transfer Protocol. *See* E-Mail SMTP Servers
Single Page Only
Special menu command, Forms, **383**
Single-page Forms, 382
SMTP Accounts. *See* E-Mail SMTP Servers
Sort Key
Customers, **127**
Sorting
in a Browse Window, 96
Special Characters
in Email Addresses, 218
Special Menu, 93, 99
Special Menu (Chat)
Beep Others, **244**
Invite, **243**
Who is in this chat?, **244**
Special Menu (Customer Letters), **320**
Create Activity, **320**
Letter List, **320**
Send email, **320**
Special Menu (Customers), **134**
Change Password, 131, **135**
Customer Status, 121, **134**
New Activity, **137**
New Contact, **136**
Special Menu (Forms), **380**
Copies, **381**
First Only, **383**
Last Only, **383**
Middle Only, **383**
PC Printer, **381**
Properties, **380**
Send to Back, **381**
Single Page Only, **383**
View All, **383**
Special Menu (Local Mailbox)
Synchronise, **448**
Special Menu (Mail)
History, **237**
Mark as not read, **238**
Presentation, **245**
Reply, **236**
Save Text as File, **240**
Send E-mail, **232**
Special Menu (Master Control panel)
Send and Receive E-mail, **232**
Special Menu (Persons)
Change Password, **369**
Special Menu (Quotations), **184**
Create Activity, **184**
Create Mail, 170, **186**
Recalculate Discount, 428
Subtotal, **184**
Update Currency Price List Items, 433
Special Menu (Reports)
Recalculate, 103
Specification
Persons, **369**
Specification Window, 106
Spooling. *See* Print Queue
Standard Letters
Exporting, 403
Standard Text
Customer Letters, **309**
Standard Texts
Contact Module setting, **273**
Start Date
Activities, **281**
Start Time
Activities, **281**
Starting FirstContact, **30**
Static Text
Showing on Labels, 142
Structure of Conferences, 211
Styles
Browse Window, 385
Exporting, 403
System Module register, **385**
Subsidiary Companies. *See* Companies
Subtotal
Quotations, **179**
Special menu command, Quotations, **184**
Success
Estimating, of Quotations, 176
Sum
Quotations, **178**
Synchronise
Special menu command, Local Mailbox, **448**
System Administrator, **214**
Access to Presentations, 245

Granting Access to Technics Module, 202, 375
System Data
System Module Export function, **401**
System Message
Technics Module function, **53**
System module, 37, **346**
Settings, 36
System Requirements
Macintosh, 23
Windows, 22
System Usage
Control String, 42
Number of Companies, 40
Number of Users, 40
System Module setting, **40**, 45, 361

T

Tabs, 99
Target Time
Comparing with Profile Activities, 335
Comparing with Time Activities, 335
Contact Module setting, **298**
Entering, **298**
TCP/IP
Company, 49
Technics module
and System Administrator, 202, 375
Gaining Access to, **202**
Telephone List
Contact Module report, **339**
Telephone Number
Customers, **129**
Quotations, **182**
Text
Activities, **277**
Payment Terms, **124**
Text Back-up
Creating, 56, 396
Creating Automatically, 58
Restoring from, 61, 393, 398
Text Objects
in Forms, 377
Text Types
Contact Module setting, **274**
The Book, 69, 96, 101
The Printer, 70
Their Supplier Code
Customers, **133**
Time
Comparing Actual and Planned, 335
Customer Letters, **306**
Time Activities, 265. *See also* Activities
Time option
Activities, **282**, 295
Timed Operations
Database Backup Path, 59
Database Backup Time, 59
Database Closing Time, 61
Database Opening Time, 61
Technics Module setting, 59, 60, 248
Title
Contact Persons, **325**
Tmp Folder, 215, 238
Emptying, 248
To Do Button, 73
To Do check box
Activities, **279**
To Do List, **288**
Activities appearing in, 288
Entering Activities from, 276, 289
Printing, 289
Showing Activities in, **279**
Viewing Activities from, 275
Total
Quotations, **180**
Setting Rounding Rules, 180, 360
Total GP
Quotations, **179**
Translations
Delivery Modes, 435
Delivery Terms, 435
Items, 435
Payment Terms, 435
Units, 435
Type Styles. *See* Styles

U

Unit
Items, **153**
Unit Price
Quotations, **178**

Use in Pricing Quotations, 178
Units
Changing to reflect Language of Customer, 435
Contact Module setting, **150**, 153
Exporting, 401
Unread Mail, 229
Unsent Mail, 229
Update Currency Price List Items
Special menu command, Quotations, 433
Update Quotations
Contact module function, **188**
Upgrades
Obtaining, 65
Upgrading from Previous Versions, 65
User Company. *See* Company Info
Users. *See also* Persons
Creating Mailboxes for, 206
Listing, 346
Listing those without Mailboxes or E-Mail Aliases, 249
Number of, 40

V

Valid Until Date
Quotations, **175**
Value in Text Name
Currencies, **432**
Value Packs, **362**, **406**
Advanced Pricing, **408**
Currencies and Languages, **430**
Fax, **438**
Local Mailbox, **442**
VAT
Calculating, 362
Quotations, **179**
Setting Rounding Rules, 179, 360, 432
Using with Price Lists, **160**, **412**
VAT Code
Customers, **132**
Item Groups, **149**
Items, **154**
Quotations, **178**
Setting Default for Items, 149, 153, 154
Setting Default for Sales, 132
VAT Codes
Code, **362**
Description, **363**
Excl %, **363**
Exporting, 401
Incl %, **363**
System Module setting, 132, 149, 154, 178, **362**
VAT Law
Company Info, **348**
VAT Law Code
Company Info, 39
VAT Registration No
Quotations, **182**
VAT Registration Number
Customers, **131**
View All
Special menu command, Forms, **383**
Virus
Removing, 56
Volume
Items, **155**

W

Warning
Customers, **133**
Items, **156**
Warranty Months
Items, **154**
Website. *See* WWW Address
Website (Hansa), 65, 73
Week Numbers
Defining for the Calendar, 363
Missing from Calendar, 295
Weeks
System Module setting, **363**
Weight
Items, **154**
Who is in this chat?
Special menu command, Chat, **244**
Width
Items, **154**
Wildcard. *See* Paste Special
Used in Searches, 96
Window Menu, 93
Windows
Active Window, 95
Closing and Saving Changes, 88
Closing without Saving Changes, 88

Management of, 95
Moving, 95
Windows (Microsoft)
Multi-user Installation, 26
Single-user Installation, 23
System Requirements, 22
Work Area, 68
WWW Address
Customers, **133**

Z

Zone
Customers, **132**
Quotations, **181**