



UA Contact Management Module

Appointments / Calendar

- Add appointments to the scheduler in three ways. By selecting a time and then start typing, highlight a time and then click on the Add Appointment Icon, .highlight a time and right mouse click, which will bring up the Edit Appointment window
- Appointment duration and starting times can be changed using the mouse or the Edit Appointment window.
- Drag and drop, stretch appointments
- Views: Daily, weekly, monthly, Yearly
- To Do List

User Level Configuration

The system administrator can assign a relationship between the UA70 security file and employee records from the Payroll Module. The administrator can then assign User Access Rights to the Customer, Vendor and Employee tables. Selecting 'Share History' will enable this user to see history record created by other users. Anyone who has a mapping defined will gain access to Personal Contacts as a minimum default.



Contact Management

Manage Your Contacts - Lester Clawson

Account Status: Contact History | Order Status: History Details | User Fields: Contacts | Filters: Customer Invoices | Customer Payments

Activity: Letter
Date: 08/17/1999
Time: 2:18:40 PM
Duration: 0.71
Successful Activity
Task Completed

Acropolis Custom Marble and Granite, Inc.
1375 South Kingshiway
Saint Louis, MO 63110
(555) 535-6662
Contact: Charles

Date	Time	Duration	Activity	Complete Description
08/17/1999	2:18:40 PM	0.71	Letter	Write First Letter ASD
08/17/1999	2:27:28 PM	0	Letter	Second Letter

Contact Management provides the user the tool to manage Contact history for Customers, Vendors, Employees and Personal Contacts. The operator can see any or all of these tables based on the rights granted by the Administrator.

Manage Your Contacts - Lester Clawson

DATE	INVOICE #	BATCH	REFERENCE	ORDER #	AMOUNT	BALANCE DUE
05/09/1998	1026	101	O/E Billing	1020	\$181.94	\$0.00
08/06/1999	1064	152	O/E Billing	1051	\$318.38	\$0.00
10/06/1999	1080	167	O/E Billing	1065	\$795.33	\$0.00
04/14/1999	1021	95	O/E Billing	1020	\$1,970.62	\$0.00
					\$3,266.87	\$0.00

Activity Objects

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Activity Descriptions

Object Type:

- Microsoft Photo Editor 3.0 Photo
- Microsoft Photo Editor 3.0 Scan
- Microsoft PowerPoint Presentation
- Microsoft PowerPoint Slide
- Microsoft Word Document
- Microsoft Word Picture
- Picture
- MS Organization Chart 2.0

Result: Inserts a new Microsoft Word Document object into your document.

➔ After selecting an object, you will be returned to the Activity Description screen and the object will be active but minimized. Moving off the object and then double clicking on the object will cause the object to become active and full sized

← You can define one or more OLE objects that can be used as default documents when creating history records. Examples might be Fax cover letters or default proposals. These objects can be stored with the history for later review or printing

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Microsoft Word

Document in Activity Descriptions

Fax

To: [Click here and type name] From: [Click here and type name]

Fax: [Click here and type fax number] Pages: [Click here and type number]

Phone: [Click here and type phone number] Date: 09/15/99