

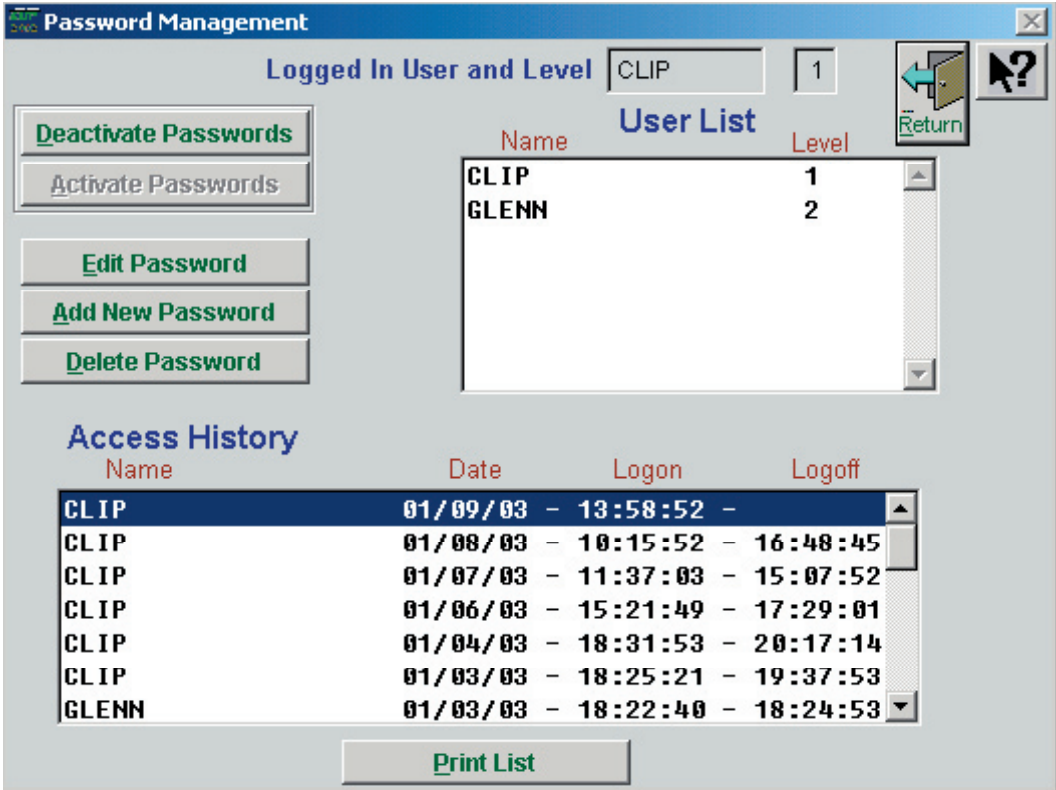
Contact Management System (CMS)

***** Pro only feature *****

CMS is a contact management system. This tool helps you track customer complaints, compliments, customer service issues and follow-up calls to increase the value of your customer service and your business in general.

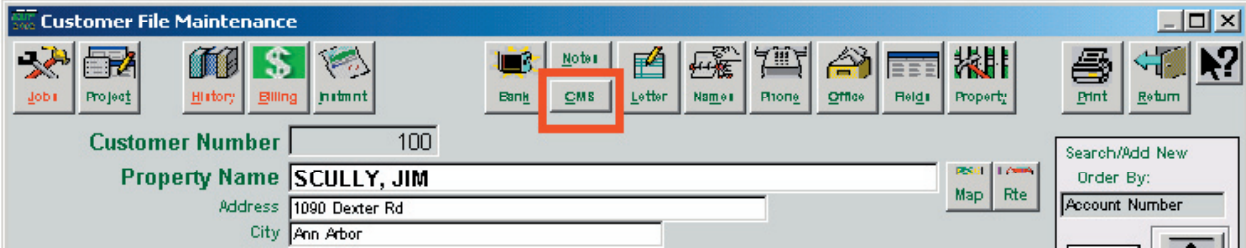
It would be helpful to read the Password section before reading this section.

You should have passwords setup to use this feature.



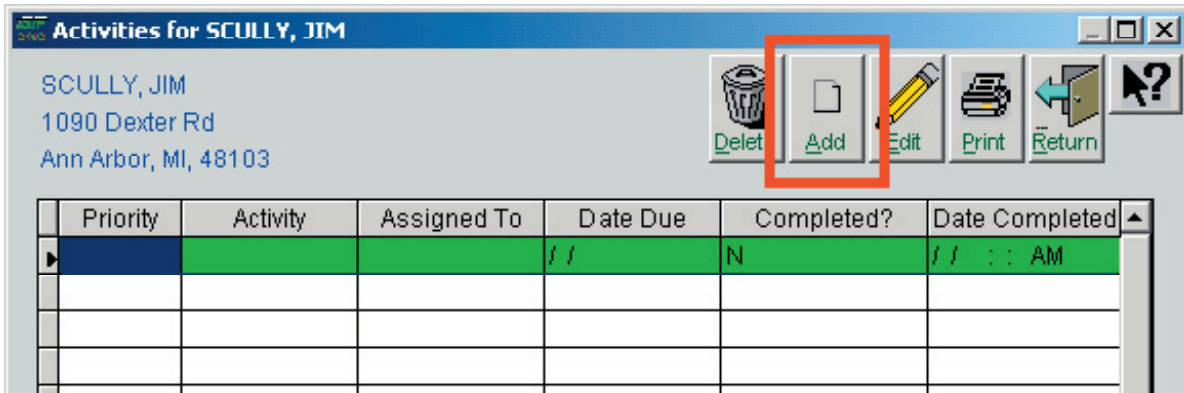
1. Getting Started

When a customer calls you, for whatever reason, bring up their account in Customer File Maintenance. We are going to go through this example as a customer complaint from Jim Scully. After you have his account showing, click on the CMS button in the top center part of the screen.

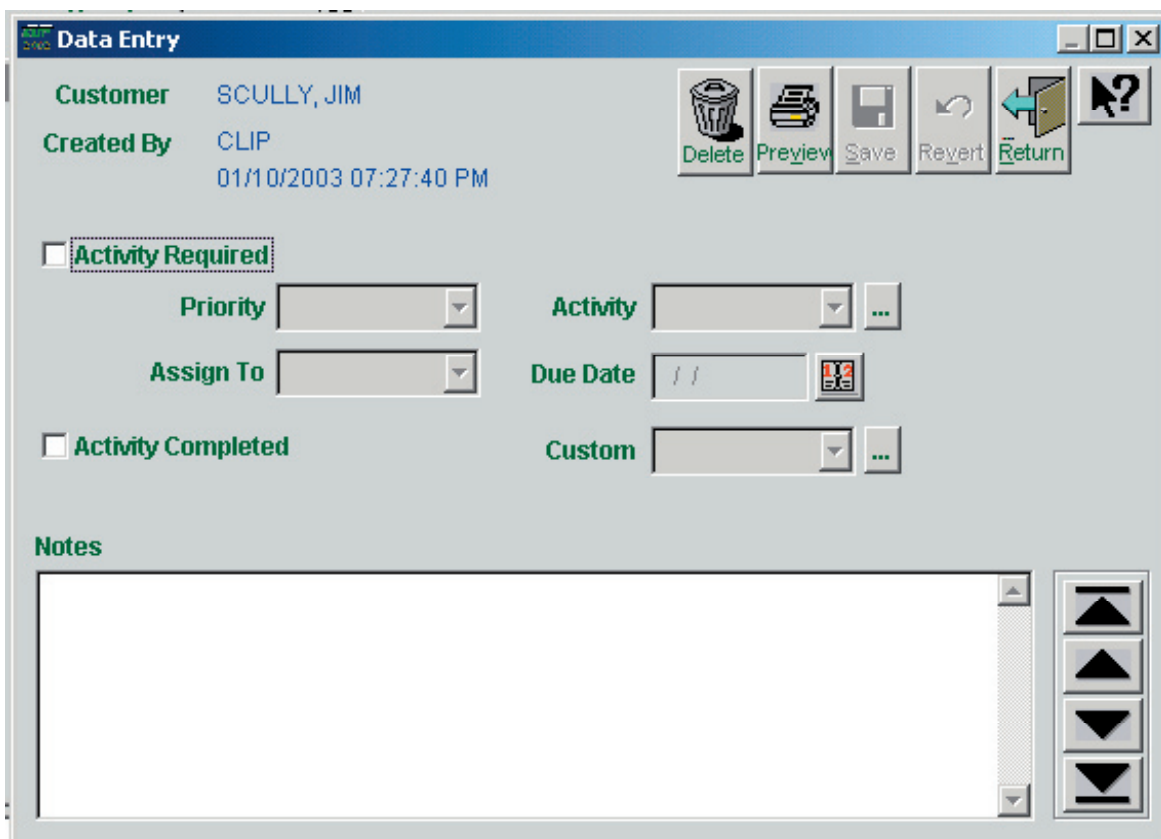


The following screen will appear.

Contact Management



Now select the Add button to assign a new contact task for this customer. The following screen will appear.



The following are the options:

Activity Required

If some type of action is required then check Activity Required. If this is just a note that needs to be posted to the customer history for future reference then no activity is required.

Priority

You can assign a Priority number 1-5. They have no official meaning to CLIP. You can assign your own priority system for each item assigned to an individual.

Assign To

Contact Management

The pull down list will show you all the names that you have set up in the Password section. Assign To the person that will be responsible for completing the activity.

Activity

Assign the type of Activity that needs to be done. You can add new ones by clicking on the button with the 3 dots.

Due Date

Assign a Due Date (completion date) for that activity.

A complaint with a priority 1 has been assigned to user CLIP with a due date of 1/10/03. When finished filling in the form, select the Save button.

The screenshot shows a 'Data Entry' window with the following fields and controls:

- Customer:** SCULLY, JIM
- Created By:** CLIP, 01/10/2003 07:27:40 PM
- Activity Required:** (checked)
- Priority:** 1 (dropdown)
- Activity:** Compliment (dropdown with a 3-dot menu)
- Assign To:** CLIP (dropdown)
- Due Date:** 01/10/03 (calendar icon)
- Activity Completed:** (checked)
- Custom:** (dropdown with a 3-dot menu)
- Timestamp:** 01/11/2003 11:49:31 AM
- Notes:** 1/10/03 Scully not happy with last mowing, back lawn not done.

Buttons at the top right include: Delete, Preview, Save, Revert, Return, and a Help icon.

After saving your changes you will now see the Activities for SCULLY, JIM screen and will see the one item on the screen for this customer.

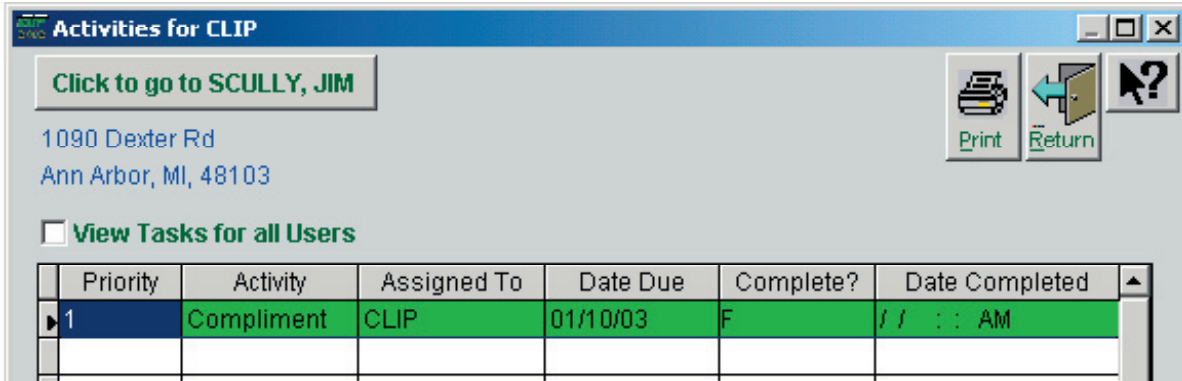
At this point, you will be able to enter another activity, edit the current one, print the list of the activities or return out of this screen and continue on with your normal routine.

There is no end of uses for this section of *CLIP*. Chemical applicators may find it useful for scheduling calls before they go out to spray the lawns. You can simply use it as a phone log for any and all conversations you may have with a customer/client. You can also use it to communicate with your employees and co-workers by setting them up in *CLIP* with a record in File Maintenance.

2. Completing the task(s)

Now it is time to complete the task. One of the best things about this feature is that when you log into *CLIP*, your outstanding tasks come up first to remind you of things you need to do. The first thing it will do is show you a list of your tasks/calls that have not been completed. Only uncompleted tasks will show. The next time CLIP (the user) logs into *CLIP*, the following screen will appear.

Contact Management

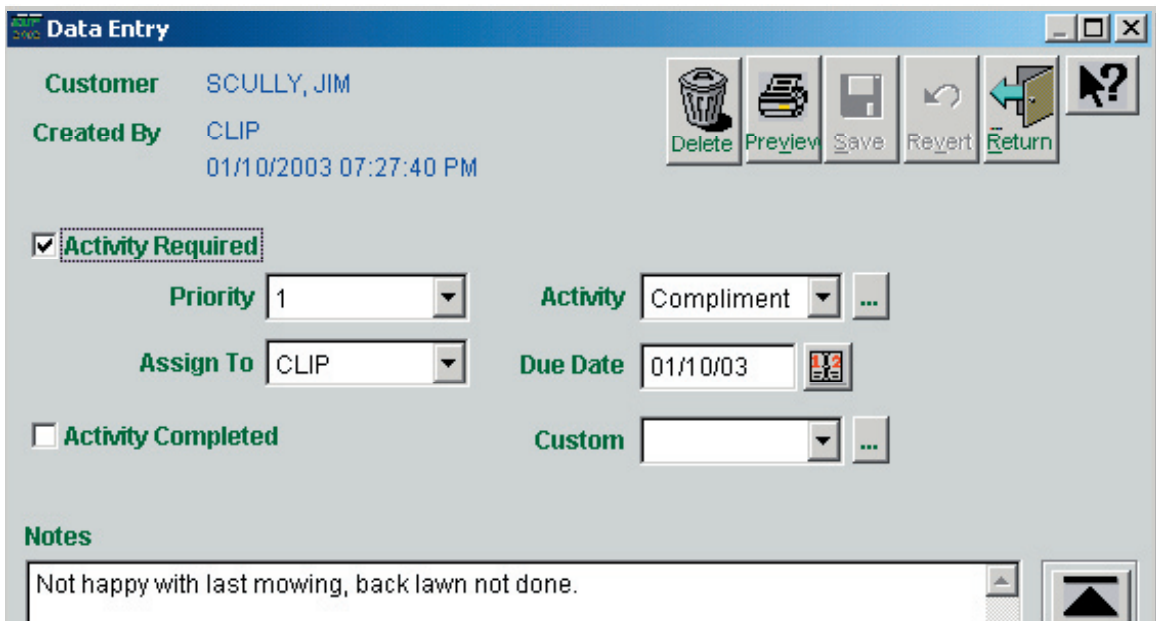


You will notice there is a check box to View Tasks for all Users on this screen. This will only appear when the Level 1 user is logged in to CLIP. All other users will only see their own tasks. Note that the task has not yet been completed.

At this point, you have the option to (1) go directly to the account screen of the selected customer by selecting Click to go to SCULLY, JIM. This button will change and have the customer's name on it as you scroll through the various tasks. The name changes according to the customer that the task is linked to. (2) Print the list, or (3) Return to go on with other work in CLIP. Click the Edit button on the activities window to view the item.



You would now want to perform whatever activity was required.



After completing the activity click on Activity Completed check box. The date and time will show up on the screen. Be sure to also enter your notes to the current note upon completion. If the task needs to be repeated, you can simply uncheck the Activity Completed box.

Data Entry

Customer SCULLY, JIM
Created By CLIP
 01/10/2003 07:27:40 PM

Activity Required

Priority 1 **Activity** Compliment ...

Assign To CLIP **Due Date** 01/10/03

Activity Completed
 01/11/2003 11:49:31 AM

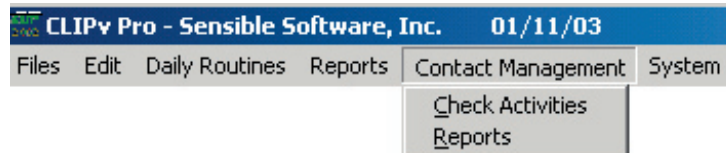
Custom ...

Notes

1/10/03 Scully not happy with last mowing, back lawn not done.
 1/10/03 Glenn immediately when back and cut Scully's back lawn.

3. Printing a list of Activities

If, at any time, you want to print a list of activities, you can go to Contact Management > Check Activities.



This will bring up the same window you see when you log on. You can then print the list or go through and complete your tasks.

Lets look and see if GLENN has any outstanding activities (see following screen).

Activities for GLENN

[Click to go to PHILLIPS, RAYMOND](#)

1033 Oak St
 Superior, MI, 48104

Priority	Activity	Assigned To	Date Due	Complete?	Date Completed
2	Call Back	GLENN	01/11/03	F	/ / : : AM

Contact Management

If you are interested in what information Mr. Phillips is requesting from GLENN, double click on #2 under Priority to bring up the information.

4. Concepts and Ideas

Some ideas on extended uses of this program. Set up each employee as a customer in *CLIP*, then you can assign tasks to them. If you receive a personal call for an employee while he is out in the field, you can just create a task for them and then, when they log into *CLIP* at the end of the day, their personal messages will display as well as the ones for your customers.

Contact Management

