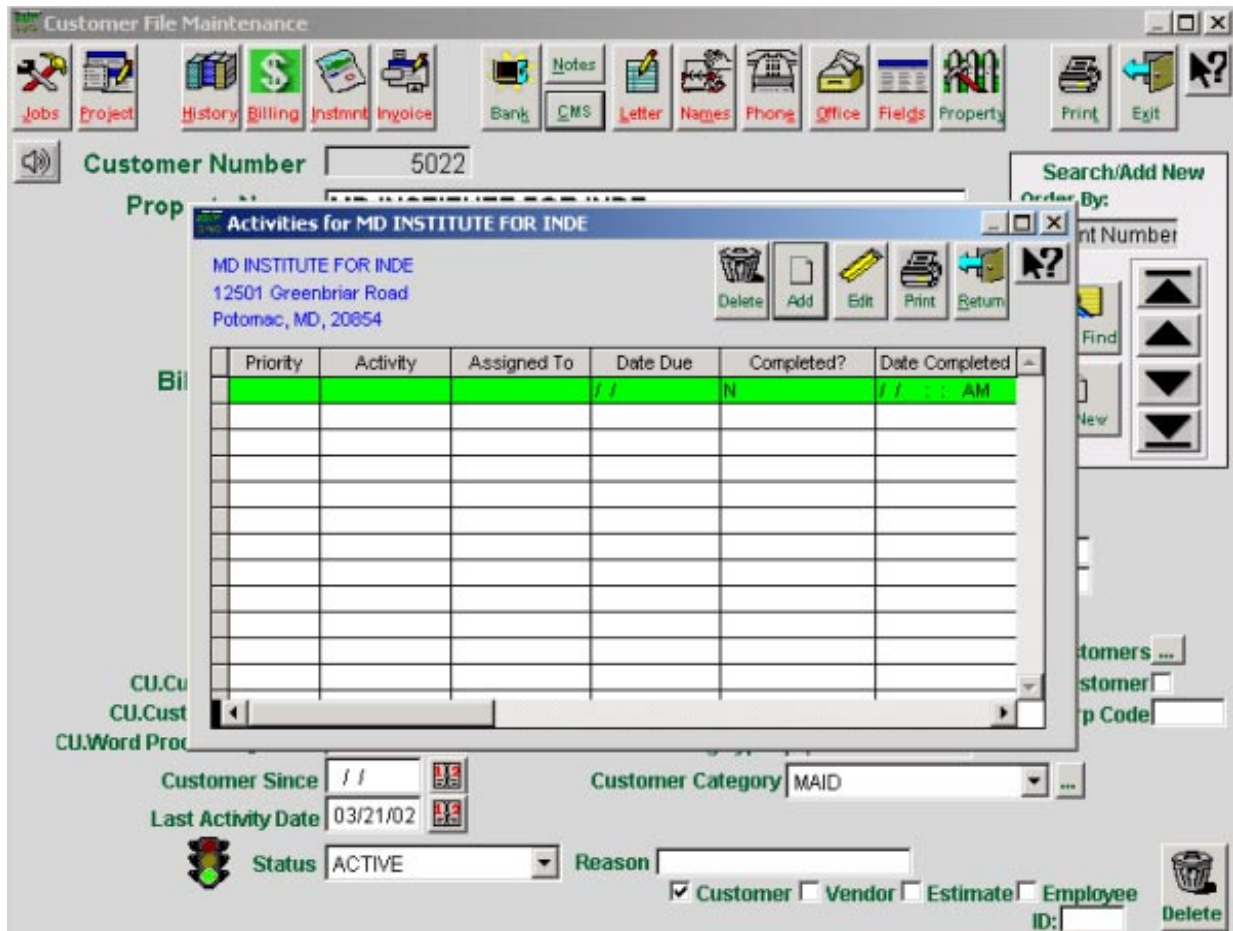


Contact Management System (CMS)

*****This feature available in Visual Pro*****

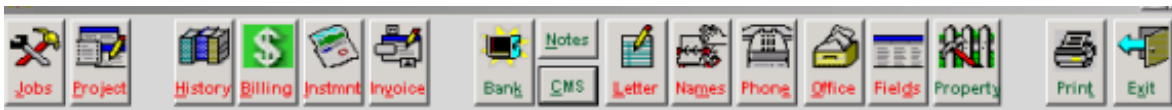
CMS is a contact management system. This tool helps you track customer complaints, compliments, customer service issues and follow-up calls to increase the value of your customer service and your business in general.



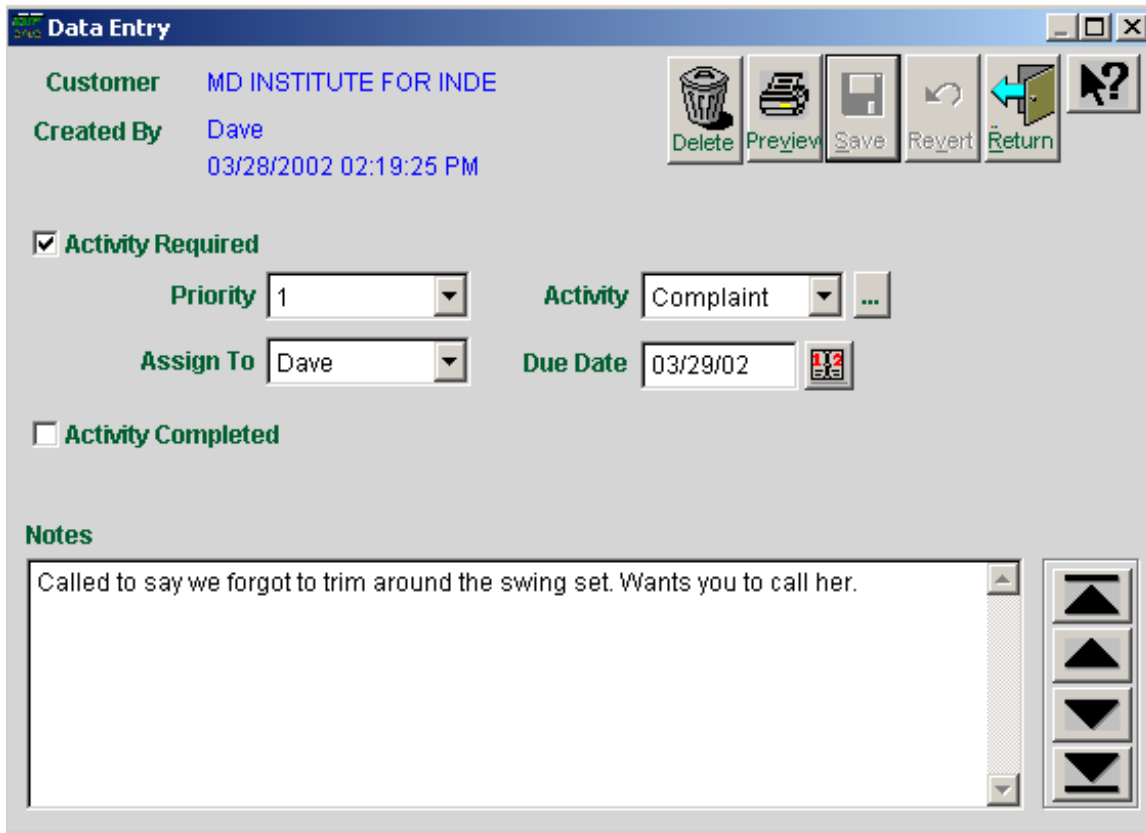
This section is designed with the use of user names and passwords being enabled/used in the *CLIP* Program. As you will see later, when using *CLIP* with the user names and passwords, when a user logs in it will automatically show what issues/calls need to be addressed. To turn on passwords, you can go to System > Set Passwords.

1. Getting Started

When a customer calls you, for whatever reason, bring up their account in file maintenance. We are going to go through this example as a customer complaint. After you have their account showing, click on the "CMS" button in the top center part of the screen.



Now you will hit the "Add" button to assign a new contact task for this customer



The following are the options:

Activity Required

If some type of action is required then you should check this off. 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 number 1-5. They have no official meaning to *CLIP*.

Assign To

The pull down list will show you all the names that you have set up in the Password section. Select the person that the activity needs to be performed by.

Activity

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

Due Date

Assign a date that it should be done by.

Save the new item

You will now be looking at the activities window and will see the one item on the screen for this customer.

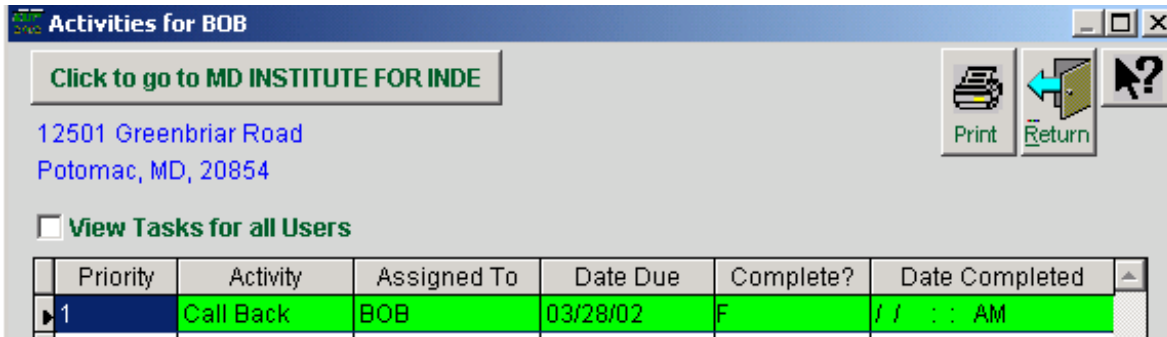
Priority	Activity	Assigned To	Date Due	Completed?	Date Completed
1	Call Back	DAVE	05/16/02	N	11 : : AM

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 in to **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 sample screen above is what it will look like when the Master user is logged in. You will notice there is a check box to "View Tasks for all Users" on this screen. This will only appear when the level one user is logged in to *CLIP*. All other users will only see their tasks.

At this point, you have the option to print the list, go directly to the account screen of the selected client, or simply hit return to go on with other work in *CLIP*.

You can immediately go to the customer's record in File Maintenance by pressing the button at the upper left hand corner of the screen. This button will have the customer's name on it, as you scroll through the tasks the button changes according to the customer that this task is linked to.

If you click the button in the upper left hand side of the window, it will take you directly to the file maintenance screen and the activity window for that account.



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 MD INSTITUTE FOR INDE
 Created By BOB
 03/28/2002 10:58:05 AM

Activity Required
 Priority 1 Activity Call Back
 Assign To BOB Due Date 03/28/02

Activity Completed
 03/28/2002 11:23:20 AM

Notes

Property Manager, Joe Smith, called to complain that the crew missed a large section of property and crushed some flowerbeds.

I called Mr. Smith and apologized for the inconvenience and advised we would be out right away to rectify the problem at no additional charge. Mr Smith seemed satisfied with this action

3. Printing a list of Activities

If, at any time, you want to print a list of activities, you can go to Other Modules > Contact Manager. 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.



////////////////////////////////////CLIP////////////////////////////////////

Activities for BOB

[Click to go to MD INSTITUTE FOR INDE](#)

12501 Greenbriar Road
Potomac, MD, 20854

View Tasks for all Users

Priority	Activity	Assigned To	Date Due	Complete?	Date Completed
1	Call Back	BOB	03/28/02	F	// : : AM
1	Call Back	BOB	03/22/02	F	// : : AM
1	Call Back	BOB	03/22/02	F	// : : AM
1	Call Back	BOB	03/22/02	F	// : : AM

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.