



Master Link TeleSales Manual

Version 5.5.3

May 2004

Sales Order Confirmation



Order For:-

A B Applications Limited ss
 Russell Industrial Estate
 Russell Road
 Bristol
 Avon
 BS1 5NH

Deliver to:-

A B Applications Limited ss
 Russell Industrial Estate
 Russell Road
 Bristol
 Avon

Electrics 'R' Us
 Wootton Gardens
 Bournemouth
 Dorset
 BH1 1PW

01202 298008
01202 298001

Tax Point	Our Ref	Your Ref	A/C No.	Alt Ref	Page
25/10/2001	SOR000428		ABAP01		1

Qty	Product Code	Description	Unit Price	Total
		Electrical components		
		Fuses		
1.0	FUSE-45AMP-240V	45 Amp Fuse (240v)	1.38	1.38
		Lighting products		
		Bulbs		
		Bulbs (Screw fit)		
3.0	BULB-SC-PE-40W	40W Pearl Light Bulb, SC - 4 Pack	5.11	15.33
		Wall lights		
2.0	WAL-IR-T-C135-60	Wall Light, Iron - C135 - Twin Lamp	26.67	53.34
		Security products		
		CCTV Products		
1.0	MONITOR-MONO	Monochrome Monitor	42.86	42.86
		Complete Alarm systems		
1.0	ALARMSYS-DOM-3	Domestic Alarm System, Model 3	229.66	229.66
2.0	ALARMSYS-DOM-5	Domestic Alarm System, Model 5	1,600.00	3,200.00
1.0	DELCHAR-UNDER10	Fast Delivery charge under £1000	15.00	15.00
		Our Payment Terms are 30 Days		

Forward thinking? Just common sense.

Net Total	£	3,557.57
VAT Content	£	0.00
Total	£	3,557.57

Please note some of the options and functionality discussed in this document may change or be dropped from the final version.

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Introduction

The Master Link TeleSales Module has been written in response to many requests from ComTek customers. The Master Link TeleSales Module's primary aim is to enable the user to be able to enter an order as quick as possible whilst the customer is on the phone. It provides a front office order entry interface, utilising the award winning Exchequer Enterprise for the Back office order processing and accounts functionality. It can be used as a TeleSales module from within Exchequer Enterprise or used in conjunction with either of the two most popular Customer Relationship Management (CRM) packages on the market. ACT or Goldmine can be used to hold customer information, such as scheduled calls, e-mails, linked documents, transaction history to drive a TeleSales environment †.

The user is able to build up the order and select the stock items via:

1. **Stock Code:**
Add stock by entering the stock code.
2. **Bespoke List:**
Bespoke lists of products may be set up, displayed in a two level tree, for quick selection. These lists can also be linked to customers of a certain type.
3. **Stock Tree:**
The Exchequer Enterprise stock tree is visible within the telesales module so that the user may select a heading from the Exchequer Stock tree and drill down to stock items, which are below the heading, for quick and easy selection.
4. **Search:**
Allows the user to search for stock by **ANY WORD** on the stock record. Additional words can also be added to the database by specifying them in the Stock General Notes.
5. **Special Offers:**
Displays a list of items, which are currently on a special offer list. These lists can also be linked to customers of a certain type.
6. **Alternatives and suggestions:**
When a stock item is selected, a window shows related information to the stock item at the top of the screen. This related information can include alternative stock codes (if they are out of stock or discontinued) or suggested accessories (batteries and cables). The user can quickly switch to these items for selection by just clicking on them.
7. **History:**
The history screen, which shows buying patterns of the customer, is also available for the user to select stock items for the order. †

Any of these different Options can be turned off to simplify the display to the end user. The stock items are displayed in a grid similar to MS Excel. Rearranging the grid to the users own needs, and saving the settings can customise the Grid.

Benefits of using with Master Link and CRM Package

A CRM package such as ACT or Goldmine allows user to store extensive information for a customer which can be synchronised to remote sites. For the TeleSales environment it has several advantages:

1. Incoming call identification
2. Schedule TeleSales calls
3. Extensive notes and related data can be store against the contact, which enables better sharing of information within your organisation.

Master Link enables you to link the Goldmine/ACT package to your Exchequer Enterprise installation to easily convert prospects in your Goldmine/ACT package to customers in Exchequer Enterprise. It also gives you access to up to date information held in the accounts package regarding the account status and previous transactions.

† Requires the Exchequer TeleSales Module to provide the Telesales History and ODBC module to be present (does not use ODBC itself).

‡ Requires Master Link Enterprise to create accounts and post History to CRM Package

Stock Related information

When the user selects a stock item, a window at the top right of the Master Link TeleSales module shows related information:

The screenshot shows the Master Link TeleSales interface. The main window displays a list of stock items with columns for Stock Code, Description, Qty, Discount, Sales Price, Net, Total, Cartons, Free, and On. The 'MONITOR-COLOUR' item is highlighted in red, indicating it is out of stock. A 'Related Window' is open on the right, showing details for the selected item, including Account, Price, Warning, Suggestion, Alternative, Free Alternative, Links, Web Address, Notes, and Prompt. A 'Summary Window' is also open, showing a table with columns for QtyFree, QtyBackOrd, LastBought, LastPrice, Hist1, Hist2, Hist3, Hist4, and Hist5. Callout boxes provide additional information about the windows and the highlighted item.

Related Window shows information window for stock item selected (MONITOR-COLOUR)

Order grid Item out of stock highlighted in different colour

Current order line: 2*MONITOR-COLOUR with 10% discount.

Summary Window shows, customisable fields, in this case Stock Free, Qty on Backorder and previous history for MONITOR-COLOUR for current customer.

The related window shows:

1. Customers **current price band**
2. **Free stock level.** If locations are turned on then the window shows those locations which contain stock.
3. **Price or Special Prices.** Shows any Discount, Qty breaks etc.
4. **Warnings.** A Warning can be put on the stock item. This is shown in the related window in a different colour. This warning can be optionally displayed when the stock item ordered is selected.
5. **Suggestion.** Shows any suggested item for stock item, such as batteries etc. Alt+S will show a list of suggestions from which items can be ordered.
6. **Alternatives.** Shows any alternatives for a stock item such as replacement items. Alt+S will show a list of alternatives that can be ordered from.
7. **Free Alternatives.** Shows any alternative item of stock that is sold at the same price as the original item.
8. **Offers.** Free items offered when the customer buys x of a certain product.
9. **Links.** Shows any external documents that are linked to the stock item such as specification. Double clicking on the item will open the document. ↕
10. **Web site.** Shows any web site that is linked to the stock item. Double clicking on the item will open the document.
11. **Notes.** Any Exchequer General notes for stock item.

All this above information is stored on the Exchequer Stock Record and not in an external database.

↕ Requires the Exchequer ODBC module to be present (does not use ODBC itself).

Grids

The Telesales module makes use of grids, or cells, giving it an appearance and functionality similar to MS Excel. The user can rearrange the columns to suit their own requirements by dragging the column headings and changing column widths etc. These rearrangements can be saved so that the system always shows the new settings (Options >> Grid Layout >> Save). Up to four different layouts can be defined and easily selected by pressing Alt+1 - 4

For example

A Transaction could be shown (Alt+1):

Stock Code, Description	Qty	Discount	Unit Price	Sales Price	Total	Margin	Free	Last Bought	On	Off
SOCK-ALU-1G-13A, 1 gang, 13amp soc			6.56	6.56		20.0%	35	15-Feb-00		
COND-W-TERMBOX20, 20mm White C			5.00	5.00		20.0%	20	15-Feb-00		
BULB-SC-PE-40W, 40W Pearl Light Bul		10.00%	5.11	4.60		41.3%	415	15-Feb-00		
TRUNK-38x16x3M, 38 x 16mm Cable tr	1		6.03	6.03	7.09	20.1%	30	15-Feb-00		
COND-B-INSBEND25, 25mm Black Co	2		3.20	3.20	7.52	20.0%	14	15-Feb-00		
SENS-PIR, PIR Sensor			6.43	6.43		30.0%	-31	24-Nov-99	40	
SL-1000W-50D-PH1, Phillips Spotlight 1	4		26.50	26.50	124.55	10.0%	65	15-Feb-00		
SL-600W-50D-PH21, Phillips Spotlight E			22.22	22.22		10.0%	63	15-Feb-00		
MONITOR-MONO, Monochrome Monit		10.00%	42.86	38.57		22.2%	16	24-Nov-99		
ALARMSYS-DOM-1, Domestic Alarm S	5	15.00%	275.37	234.06	1,375.13	70.0%	2	16-Apr-02		
ALARMSYS-DOM-3, Domestic Alarm S		15.00%	729.20	619.82		65.0%	21	24-Nov-99		
ALARMSYS-DOM-5, Domestic Alarm S	6		1,600.00	1,600.00	11,280.00	67.2%	10	28-Mar-00		
MONITOR-COLOUR, Colour Monitor		10.00%	68.57	61.71		22.2%	18	24-Nov-99		
ALARMSYS-DOM-2, Domestic Alarm S	7	12.50%	437.20	382.55	3,146.47	70.0%	11	06-Mar-00		
ALARMSYS-DOM-4, Domestic Al		20.00%	984.23	787.38		44.3%	23	03-Apr-02		

or we could show the History (Alt+2):

Stock Code, Description	Qty	Last	Last Price	Last Disc.	Hist 1	Hist 2	Hist 3	Hist 4
Bulbs (bayonette)								
BULB-BA-PE-40W, 40W Pearl Li		13-Aug-02	5.05	10.00%	0m, £5	4m, £5		
CCTV Products								
CAMERA-COV-CLOCK, Covert C	2.00	15-Apr-02	28.21	10.00%	4m, £28			
MONITOR-MONO, Monochrome		24-Nov-99	10.71		33m, £43			
MONITOR-COLOUR, Colour Ma		24-Nov-99	22.86		33m, £69			
Complete Alarm systems								
ALARMSYS-DOM-1, Domesi	5.00	15-Apr-02	275.37	15.00%	4m, £275			
ALARMSYS-DOM-3, Domestic A		15-Apr-02	729.20	15.00%	4m, £729			
ALARMSYS-DOM-5, Domestic A	6.00	15-Apr-02	1,600.00		4m, £1600			
ALARMSYS-DOM-4, Domestic A	7.00	15-Apr-02	984.23	20.00%	4m, £984			
ALARMSYS-DOM-2, Domestic A		15-Apr-02	437.20	12.50%	4m, £437			
Conduit								

Or stock info (Alt+3):

Stock Code, Description	Qty	Free	In	Allocat	On	Total	Discount	Sales Price	Nett	TPQ
SOCK-ALU-1G-13A, 1 gang, 13amp s		35.00	35.00					6.56		0.0
COND-W-TERMBOX20, 20mm White		20.00	20.00					5.00		0.0
BULB-SC-PE-40W, 40W Pearl Light E		415.00	416.00	1.00			10.00%	4.60		0.0
TRUNK-38x16x3M, 38 x 16mm Cable	1.00	30.00	30.00			7.09		6.03	6.03	0.0
COND-B-INSBEND25, 25mm Black C	2.00	14.00	20.00	6.00		7.52		3.20	6.40	0.0
SENS-PIR, PIR Sensor		-31.00	50.00	81.00	40.00			6.43		0.0
SL-1000W-50D-PH1, Phillips Spotligh	4.00	65.00	65.00			124.55		26.50	106.00	0.0
SL-600W-50D-PH21, Phillips Spotligh		63.00	65.00	2.00				22.22		0.0
MONITOR-MONO, Monochrome		16.00	20.00	4.00			10.00%	38.57		0.0
ALARMSYS-DOM-1, Domestic Alarm	5.00	2.00	15.00	13.00		1,375.13	15.00%	234.06	1,170.32	0.0
ALARMSYS-DOM-3, Domestic Alarm		21.00	30.00	9.00			15.00%	619.82		0.0
ALARMSYS-DOM-5, Domestic Alarm	6.00	10.00	16.00	6.00		11,280.00		1,600.00	9,600.00	0.0
MONITOR-COLOUR, Colour Monitor		18.00	20.00	2.00			10.00%	61.71		0.0
ALARMSYS-DOM-2, Domestic Alarm	7.00	11.00	29.00	18.00		3,146.47	12.50%	382.55	2,677.85	0.0
ALARMSYS-DOM-4, Domestic Alarm		23.00	47.00	24.00			20.00%	787.38		0.0

The colour of each line may also be defined to signify the status or type of line. By default lines with no stock free are shown in red, but this can be changed in system set-up.

As already stated, four different grid layouts can be stored and easily switched to from the "Grid Layout" menu.

Columns Available

The grid contains the following Columns:

Field	Description
StockCode, Desc	Used to identify the Line †
Order Qty †	Present Order Qty
Unit Price	Unit Price of Stock. Band A or the Customer Band if set on the account record
Sales Price †	Actual price you are to sell the product at (Unit price less discount)
Margin	Margin you are making. Can be hidden from within system set-up. System can also warn if below a certain value. †
Discount †	Entered as a percentage of the unit price or value. A setting in systems set will make all figures entered a percentage. †
Net	Net (Sales price * Qty)
VAT Amount	VAT Amount
Total	Total (Net + VAT)
Allocated	Number of stock items allocated to orders
In Stock	Number of stock items In Stock
Free Stock	Number of stock items Free to sell
Location	Stock Location
History 1-6	Six fields which show History of items bought. †
Last Bought	Date Last purchased stock
Last Price	Last unit price of stock purchased
Last Discount	Last discount of stock purchased
Weeks Since	Weeks since stock last bought
Weight	From Stock record
GL	From Account or stock record
VAT Code	From Account or stock record
Line Type	From Stock record
Cost Centre	From Account, Exchequer user profile or stock record
Department	From Account, Exchequer user profile or stock record
TLUser 1-3 †	Transaction Line user fields
Qty WO	Populated when the transaction is imported from Exchequer with items already picked
Qty OS	
Qty Picked	
Qty Del	
User 1	These fields can display a variety of Stock record fields as selected in System Set-up "Mappings" Tab. † For example: User 1 = STUser2 User 2 = STSupplier User 3 = STBin
User 2	
User 3	
User 4	
User 5	
Cubic Qty	From Stock record. See section on Cubic Capacity †
Unit of sale	From Stock record. Usually "Each"
Unit of stock	From Stock record. Usually "Each"
Qty Multiplier †	From Stock record
Cost Price	From Stock record

† Can be customised in User or System Settings

‡ Can be edited

Last Bought and History

The order entry grid can optionally show the date, price, discount on the last order, for stock item. It can also populate six fields which show the last six orders or turnover for periods for the stock item on line:

Stock Code, Description	Qty	Sales Price	Total	Last	Last Price	Hist1	Hist2	Hist3	
ALARMSYS-DOM-1, Domestic A		234.06		24-Nov-99	91.79	3, 24m			
ALARMSYS-DOM-3, Domestic A		229.66		24-Nov-99	243.07	3, 24m			
ALARMSYS-DOM-5, Domestic A		1,600.00		28-Mar-00	1,600.00	1, 20m	1, 20m	3, 24m	
BAT-1.5AA-ALK, 1.5 v AA Battery		3.65		30-Oct-02	1.82	2, 1223m			
BAT-9PP3-ALK, 9 v PP3 Battery		3.83		30-Oct-02	1.28	3, 1223m			
BULB-SC-PE-40W, 40W Pearl Li		5.11		30-Oct-02	2.56	2, 1223m			
COND-B-INSBEND25, 25mm Ble		3.20		15-Feb-00	0.32	10, 21m	8, 24m		
COND-BLK-25MMX3M, 25mm Bl		5.63		30-Oct-02	1.88	3, 1223m			
COND-B-TERMBOX21, 20mm Bl		4.14		28-Oct-02	4.14	1, 1223m			
COND-W-TERMBOX20, 20mm V		5.00		30-O					
DELCHAR-UNDER10, Delivery				30-O					
FUSE-15AMP-240V, 15 Amp Fus		0.56		30-O					

ALARMSYS-DOM-5 Domestic Alarm System, Model 5 each								
QtyFre	QtyBackOrd	LastBought	LastPrice	Hist1	Hist2	Hist3	Hist4	Hist5
-11	0	28 Mar 00	1,600.00	1, 20m	1, 20m	3, 24m		

Last bought ALARMSYS-DOM-5 20,20 and 24 months ago, all at £1600.00 and qty of 1.1 and 3.

History is also shown at the bottom of the window, in the Summary window, so the user can read the information if columns are not visible. This is customisable by simply clicking on the column Heading (requires access to 'Options' menu).

The format of the History displayed and amount of data queried can easily be altered in System Set-up under the "History" tab:

Show Last 1-6 Transactions or last six Periods

Do not show very old data over 1-24 months.

Change the format of "History" field displayed:

- Value
- Qty
- Date
- Days
- Weeks
- Months

Do not show History in grid at all, for optimum speed or just show history in summary window at bottom of screen

Sort History by last bought date

Don't show decimals in history (making it easier to read)

Get History in background process and optionally sort into stock headings

TeleSales Window

TeleSales Header (Alt+H)

The first page of the TeleSales module shows the account details selected:

The screenshot shows the 'Transaction Header' window with the following fields and callouts:

- Account Code:** ABAP01. Callout: Account code, Double click to edit account record
- Book:** Cash Account. Callout: Book to "Cash" account as defined in user settings † if used with CRM then will fill in the Delivery address with current CRM contact details
- View Notes:** Callout: View/Add account notes and view account record †
- Delivery DB:** Callout: Select Delivery Address from Delivery Database or Goldmine additional contacts
- Transaction Type:** SIN-Invoice. Callout: Select Transaction type SIN, SQU, SOR, COL, SORP or SRI, SCR SRF †
- Contact Name:** Russell Industrial Estate. Callout: Contact name from Goldmine (if active) †. Posted to THUser3 or AltRef depending on settings in system set-up
- Transaction User Fields:** Our Ref, Alt Ref. Callout: Transaction user fields if visible
- Credit Info:** Status: Open, Balance: 1,064.16, Crd Limit: 10,000.00, Cr Avail: 9,935.84, YTD (inc VAT): 1,064.16, Last YTD: 37,659.34, Other YTD: 211,654.26. Callout: Current Credit information for account
- Delivery Address:** Callout: Delivery address for this transaction †

From the menus the user can:

- Find an account by Account code, Alt Account Code, Name or Postcode
- Process Credit Card Transactions
- Book to a direct account, and optionally read GOLDMINE/ACT contact details to delivery address
- Start a new Transaction
- View all outstanding ordered items for account
- Save/Load Transaction from file
- View User/Route Totals
- Easily read a posted Transaction from Exchequer. Either by specifying the Our Ref (Exchequer Transaction Reference) code or from a list of last 10 Transactions posted. These cannot be edited if Posted or part delivered.

If the Master Link TeleSales module is used with Goldmine the user can select a delivery address from goldmine "Contacts" tab for the contact.

† Can be customised in User or System Settings

Add Stock Item (Alt+A)

An item can be added to the Transaction by pressing Alt+A and entering the stock code,.

Stock code entered here

Qty, price and discount edited here

Press to add to Transaction

If the stock code has already been entered on the transaction then the details, already entered, will be displayed.

Add from List (Alt+L)

Bespoke Stock selection lists can be built:

Stock selection lists which can be organised as a two level tree

Stock items on list for quick selection

Stock Code	Description	Qty	Total	Discount	Sales Price	Net	TPG	Cartons	Free
ALARMSYS-DDM-1	Domestic Al		275.37			0.00	0.00		-3.00
ALARMSYS-DDM-2	Domestic Al				437.20		0.00		6.00
ALARMSYS-DDM-3	Domestic Al				729.20		0.00		15.00
ALARMSYS-DDM-4	Domestic Alarm System, Model 4				984.23		0.00		34.00
ALARMSYS-DDM-5	Domestic Al				1,747.03		0.00		-13.00
ALARMSYS-INDUST	Industrial A				4,005.77		0.00		22.00
BEACON-AMBER-24V	Amber Be				7.86		0.00		12.00
CAMERA-COLOUR-HR	Colour C				55.00		0.00		28.00
CAMERA-MONOCHROM	Monoc				38.57		0.00		43.00
CAMERAKIT-ALL	Camera Kit for				66.89		0.00		15.00
DOORLOOP	Door Loop				5.36		0.00		163.00
MONITOR-MONO	Monochrome				4.96		0.00		10.00

This allows users to select from bespoke lists. For example:

- Special Offer List
- This years surf boards products
- Osram bulbs
- Philips bulbs
- All of "Tesco's" own list of products

See "Defining Selections Lists" section, which explains how to define these lists.

Add from Tree (Alt+R).

Stock can also be selected from the Exchequer stock tree:

Exchequer Stock tree. Note: an option under "General" in system set-up allows this window to Auto Expand

Stock Items for selection which are under:
Electrical Components
Hardware items
Cable Clips

Stock Code, Description	Qty	Sales Price	Discount						
CABLE TIE 200MM, Cable Tie 20		4.80							
CABLE TIE 300MM, Cable Tie 30		6.76							
CLIP-F-WHT-1.5M, 1.5mm White	2	2.31							
CLIP-F-WHT-1M, 1.0mm White c		2.31							
CLIP-F-WHT-2.5, 2.5mm White c	3	2.66		7.98	7.98	0	30		
CLIP-F-WHT-6M, 6mm White cal		3.55				0	30		
CLIP-R-WHT-3.5M, 3.5mm White	2	2.11		4.22	4.22	0	30		
CLIP-R-WHT-4M, 4mm White cal		2.20				0	30		
CLIP-R-WHT-5M, 5mm White cal	1	2.30		2.30	2.30	0	30		
CLIP-R-WHT-6M, 6mm White cal		2.38				0	30		
CLIP-R-WHT-7M, 7mm White cal		2.49				0	30		

Account: On Price Band A
Price: £2.31 each

Press Alt+B to View Back orders
* = Double click to follow link

CLIP-F-WHT-1.5M 1.5mm White cable clip, flat (Box), cable each

QtyFre	QtyBackOrd	LastBought	LastPrice	Hist1	Hist2	Hist3	Hist4	Hist5
30	0							

Header Add List **Tree** History Search Special Offers Transaction Footer

Headings can be excluded from tree by entering "NO" in Description line 6 of the Heading stock record. This can be done by selecting the heading, in the tree, and then selecting "Options >> Edit Stock Record" (or F11) and changing Description line 6 to "NO".

Note : The TeleSales module has a special index which optimises the performance of the tree. It is therefore considerably faster than the Exchequer Stock tree.

Select from History (Alt+I)

The History tab shows the stock items previously bought by a particular customer, this can be displayed in Last bought date, Alphabetic:

Sort History can be set in "History" Tab of system settings

Shows the "Invoiced" stock History for customer.

Last Price and when bought

Last bought £275 worth, 0 months ago.

Stock Code, Description	Qty	Discount	Unit Price	Sales Price	Total	Margin	Free	Last Bought	Last Price	On
SOCK-ALU-1G-13A, 1 geng, 13amp sock			6.56	5.56		20.0%	35	15-Feb-00	3.28	
COND-W-TERMOX20, 20mm White C	1		5.00	5.00	5.88	20.0%	20	15-Feb-00	0.42	
BULB-SC-PE-40W, 40W Pearl Light Bul		10.00%	5.11	4.60		41.3%	415	15-Feb-00	0.26	
TRUNK-38X16X3M, 38 x 16mm Cable tr	2		6.03	6.03	14.17	20.1%	30	15-Feb-00	0.60	
COND-B-INSBEND25, 25mm Black Co	3		3.20	3.20	11.28	20.0%	14	15-Feb-00	0.32	
SENS-PIR, PIR Sensor			6.43	6.43		30.0%	-31	24-Nov-99	0.54	40
SL-1000W-50D-PH1, Phillips Spotlight1			26.50	26.50		10.0%	65	15-Feb-00	3.18	
SL-600W-50D-PH21, Phillips Spotlight1	2		22.22	22.22	52.22	10.0%	63	15-Feb-00	2.22	
MONITOR-MONO, Monochrome Monit	4	10.00%	42.86	38.57	181.30	30.0%	16	24-Nov-99	10.71	
ALARMSYS-DOM-1, Domestic Alarm S	3	15.00%	275.37	234.06	825.08	70.0%	2	16-Apr-02	275.37	
ALARMSYS-DOM-3, Domestic Alarm S		15.00%	729.20	619.82		65.0%	21	24-Nov-99	243.07	
ALARMSYS-DOM-5, Domestic Alarm S			1,600.00	1,600.00		67.2%	10	28-Mar-00	1,600.00	
MONITOR-COLOUR, Colour Monitor		10.00%	68.57	61.71		22.2%	18	24-Nov-99	22.86	
ALARMSYS-DOM-2, Domestic Alarm S		12.50%	437.20	382.55		65.7%	11	06-Mar-00	382.55	
ALARMSYS-DOM-4, Domestic Alarm S		20.00%	984.23	787.38		44.3%	23	03-Apr-02	785.81	

or Stock Group/Alphabetic order:

Stock Code, Description	Qty	Free	Sales Price	Discount	Nett	VAT	Total	Loc
BAT-1 5AA-ALK, 1.5 v AA Battery (4 pack)		39	4.05					
BAT-9PP3-ALK, 9 v PP3 Battery		20	3.83					
BAT-1 5C-ALK, 1.5 v C Battery (2 pack)		40	3.70					
Bulbs (bayonette)								
BULB-BA-PE-40W, 40W Pearl Light Bulb,		497	4.55	10.00%				
CCTV Products								
CAMERA-COV-CLOCK, Covert Camera m	2	27	25.39	10.00%	50.78	8.89	59.66	
MONITOR-MONO, Monochrome Mo		13	38.57	10.00%				
MONITOR-COLOUR, Colour Monitor		16	61.71	10.00%				
Complete Alarm systems								
ALARMSYS-DOM-1, Domestic Alarm Sys	5	3	234.06	15.00%	1,170.32	14.81	1,375.13	
ALARMSYS-DOM-3, Domestic Alarm Sys		21	619.82	15.00%				
ALARMSYS-DOM-5, Domestic Alarm Sys	6	10	1,600.00		9,600.00	30.00	11,280.00	

Note : This feature requires the Exchequer TeleSales Module to provide the Telesales History. The ODBC module must also be present to allow the Telesales module to read the History table.

Search by Word (Alt+C)

Search by word will search for stock items by word contained on the stock record, or by additional words specified in General notes (see Related Information section). Master Link Telesales uses a special index, which is maintained by the Master Link plug-in, to quickly find words. Matches are shown in the grid with the items with the best match at the top:

Enter word or words to search for:
 PHIL* 1000W to search for Phillips 1000w bulbs.

Which fields to search?
 This list is defined in "Options >> Search Word Index >> View Search Options" menu. See next section. This allows the user to restrict the search to just Stock user fields.

Stock Code, Description	Qty	Total	Discount	Sales Price	Nett	TPQ	Cartons	Free
Rank 1 (Matches 2 words)								
SL-1000w-50D-PH1, Phillip				31.80			0 0	63.00
Rank 2 (Matches 1 words)								
SL-400w-60D-PH12, Phillips Spo				22.00			0 0	50.00
SL-500w-60D-PH15, Phillips Spo				24.00			0 0	65.00
SL-600w-50D-PH21, Phillips Spo				26.67			0 0	65.00

2 Word Match

1 Word Match

SL-1000w-50D-PH1	Phillips Spotlight 1000w, 50 Degree, screw fitting	each						
QtyFre	QtyBackOrd	LastBought	LastPrice	0 - 4 Months	5 - 8 Months	9 - 12 Months	13 - 16	17 - 20 Months
63	0		0.00					

Results ranked by match, yellow line separates ranks

For example

Stock item :BULB-100W-ES, 240V 100w Bulb ES, Supplier:RS

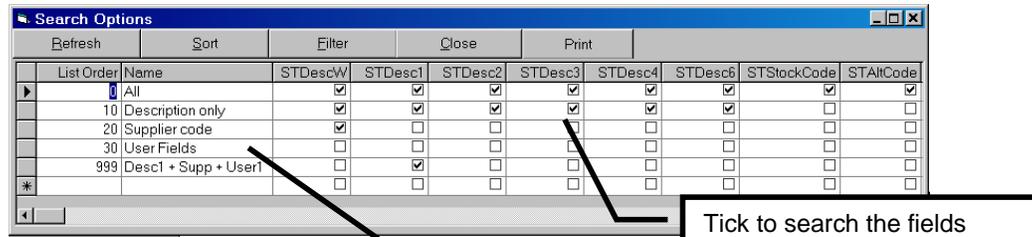
Could have BULB SPOT LAMP LIGHT SCREW EDISON added to the search words. So if user enters "EDISON 100W", "SCREW 100W", "LAMP EDISON 100W", "RS LAMP 100W" or "LAMP 240V 100W" the item will appear in the list at the top of the grid.

Words such as "AND", "IN" and "ALSO" are excluded from the index. Exclusion words are held in "Exclude Words" table. This can be accessed from "Options >> Search Word Index >> View Exclusion List" menu option.

Start of	Word*
Contains	*Word*
Ends with	*Word

Word search fields

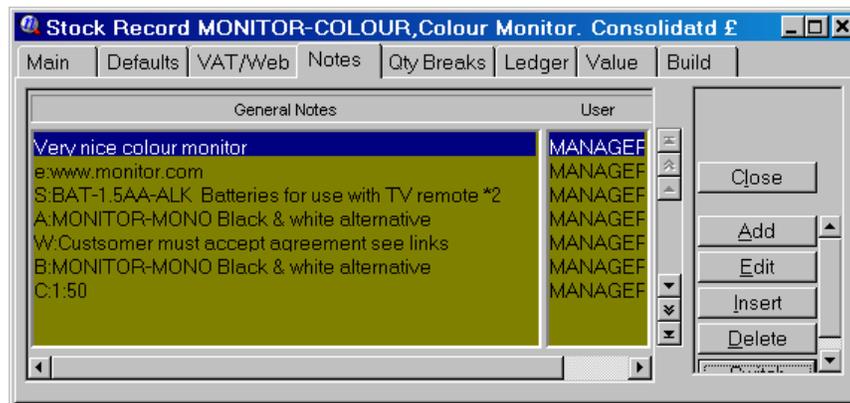
The fields that the “Search” tab searches can be customised from in “Options >> Search Word Index >> View Search Options” menu



Entering related information

Description that is displayed in the “Search fields” list on Search window

Related information is entered, within Exchequer, in the General Notes for the Stock item. If TeleSales Plug-in is active in Exchequer Enterprise then the stock information is updated live.



This information can easily be edited from within the Master Link Telesales module by simply selecting a stock item and selecting “Options >> Edit Stock Record” menu or F11. This will display an edit window, which allows the user to quickly update stock fields and related information listed below. This window can be left open and will change to display whatever stock record is selected in the Order window.

The first letter followed by “:” signifies information:

Display Message in Lookup window

M:Ensure the customer knows of the risks

Display Warning Prompt after Qty

P:Ensure the customer knows of the risks

Alternative when Stock levels are low

A:ALTSTOCKCODE Slightly better

B:ALTSTOCKCODE Slightly better product at same price as original

Suggest other products

S:SUGGESTED ITEM Carry case

Replacement for discontinued Stock item

R:REPLACEMENT Replacement for Stock Item

Long description for Stock item

D:Long description for Stock item

Web site link

E:www.website.com

Description in different language for Form set

F:1 IDIADJ adada affaf

Extra Search words

W:BULB SPOT LAMP LIGHT SCREW EDISON

Word Search Index

The Telesales module uses a special index that contains all the words on the stock record, plus any extra words specified, to enable fast retrieval of data. This index is used for the words search and the bespoke stock lists.

It is maintained in several ways:

1. From within the TeleSales Module, Selecting "Options >> Search Word Index >> Update Word Index Now". Note all users must be out of the TeleSales module whilst this is performed
2. Running TeleIndex.exe from within the Mlink directory
3. Running TeleSched.exe on the server (if NT) or designated computer to update overnight.

In our tests, a company with 3500 stock records took 1-2 minutes to update. It is recommended that option 3 is implemented.

Words such as "AND", "IN" and "ALSO" are excluded from the index. Exclusion words are held in "Exclude Words" table in Temp.mdb of the MLINK directory and can be edited if required.

The last Index update date can be examined from the "Help >> Utilities >> View Index Log" from within the TeleSales module.

The TeleSales module will warn if the index has not been updated within the last two days.

Footer (Alt+F)

The Footer shows a financial summary of the transaction:

Transaction Footer

Line Type Totals
 Normal: 16,377.79
 Labour: Distance: 0
 Materials: Weight: 68.43
 Freight: Cartons:
 Discount:

Totals
 Settlement: 0 % Days: 0
 Discount: 1,590.09 Discount: 1,590.09
 Net: 16,377.79 Net: 16,377.79
 VAT: 2,866.13 VAT: 2,866.13
 Total: 19,243.92 Total: 19,243.92

Delivery Scheme (Alt+S):
 None
 Normal Delivery
 Special Fast Delivery

Description (Alt+D): Charge (Alt+R): 45.00
 Fast Delivery charge over £1000

Message (Alt+M):
 None
 Christmas Message

Message:
 Our Payment Terms are 30 Days

General Notes (Alt+G):
 Please delivery to back door

Bottom Line (Alt+B):
 This text will appear on the bottom of the Transaction

Links:
 15/08/02 Link-D:\500\DATA\DEMO\DOCMAS... Edit

Buttons: Zero Sales Price, Apply Discount, Finish Transaction

Callout boxes:
 Delivery charge †
 Preset Message selection †
 Transaction Totals †
 General Notes †
 Free flow text to appear at the bottom of the Transaction †
 Linked document †
 Finish Transaction †
 Apply Discount to all lines that have no discount †
 Zero all Sales prices for returns †

The Footer also shows delivery charge for the transaction. This can be selected manually or automatically filled in based on transaction value, weight, cubic capacity or delivery distance (held on customer record).

Preset Messages can be defined or input manually.

Posting the Transaction

Pressing the [Finish Transaction] button on the footer will display a final conformation window:

Confirm Post New Transaction SUBJECT TO ACCOUNT STATUS CHECK

Transaction Date: 15 Aug 2002 Due Date: 14 Sep 2002

Summary:
 Account: ABAP01
 A B Applications Limited., Russell Ind
 Route Number : 2 EC London (City 2)
 Delivery: 45.00
 Net: 16,377.79
 VAT: 2,866.13
 Discount: 1,590.09
 Total: 19,243.92

Type (Alt+T):
 SOR - Order
 SIN - Invoice
 SQU - Quote
 SRI - Invoice with Payment
 SORP - Order with Payment
 COL - Collection
 SCR - Credit Note

Buttons: Post, Print, e-mail, Save to File, Credit Card, Cancel

Callout boxes:
 Review Transaction & Due\Del. Dates †
 Review Type of Transaction †
 Brief Summary of value †
 • Post Transaction †
 • Post and Print †
 • Post and e-mail †
 • "Save to File" for later amendments †
 • Save as Credit Card Transaction for processing by another user †

The first three buttons at the bottom post the Transaction into Exchequer Enterprise and optionally print or e-mail (via SMTP or MAPI).

Once the transaction has been posted, the OurRef is added to the "Transaction" menu. This allows the user to quickly pull up a previously posted transaction. The transaction can then be edited and updated in Exchequer as long as no items have been picked on the order and the transaction has not been posted in Exchequer.

Quotes

If used with Goldmine/ACT the Master TeleSales module will post the forecast sale back to the contact record in Goldmine/ACT when a quote is created. It will also optionally create a linked document. This allows the user to track forecast sales and view outstanding quotes using the CRM package.

The user can easily access the Quote by simply double clicking on the Linked file from the contact record in Goldmine/ACT. The TeleSales module will then open the Quote, which is stored in Exchequer Enterprise, for editing. The user can turn the quote into an SOR (Order), SIN (Invoice), SRI (Sales receipt with payment), etc. by simply posting the transaction as a SOR, SIN or SRI etc. A delete button is provided on the Header of the Transaction allowing the user to remove the Quote from the system.

When converted or removed the pending forecast sale and linked document is removed from Goldmine/ACT. The date last SIN,SOR, Last Won or Last Lost are updated in Goldmine/ACT.

Note: Master Link is required for the above functionality.

Save/Load Transactions F9

If the customer decides they need more time to decide what they want, the user can save the Transaction to file, and then reload when the customer is ready to place the order.

These Transactions can be easily reloaded by any user, by selecting "Transaction >> Load from file" menu option. This displays the following:

The screenshot shows the 'TeleSales User Set-up' window. On the left, there is a list of users: DEMO USER, GEOFF, KEVIN, MANAGER (highlighted in blue), MASTER, PAUL, and ROB. Below this list are 'Delete' and 'Close' buttons. The main area displays a table of 'Transactions Saved (double click on line to load)'. The table has columns for Date, Account, Name, Nett, Total, and Type. A callout box points to the 'MANAGER' user in the list, and another callout box points to a transaction row in the table.

Date	Account	Name	Nett	Total	Type
16 Apr 2002	ABAP01	A B Applications Limited	£ 4104.81	£ 4823.15	SOU-Quote
16 Apr 2002	ACEE01	Ace Electrical Supplies	£ 4164.23	£ 4892.98	SOU-Quote
16 Apr 2002	AFEL01	A F Electrical Limited	£ 3,679.18	£ 4,323.04	SOU-Quote
16 Apr 2002	ASTR01	Astre Communications Limited	FF 40,052.77	FF 40,052.77	SOU-Quote
16 Apr 2002	ABAP01	A B Applications Limited	£ 37,269.46	£ 43,791.62	SOU-Quote

These options can be restricted in user settings.

User Totals F3

After Posting the Transaction the Total User value can be displayed:

Type	Value	No Trans	Avg Value	Qty	Weight	Volume
Day Totals						
Orders	107.68	1	107.68	9.00	0.00	0.00
Payments						
Orders	107.68	1	107.68	9.00	0.00	0.00
Week Totals						
Quotes	12,322.00	3	4,124.62	39.00	46.44	0.00
Orders	57,996.81	7	8,285.26	114.00	218.24	0.00
Payments						
Orders	7,700.10	4	1,925.03	36.00	33.50	0.00
Last Week Totals						
Quotes	85.60	1	85.60	9.00	0.00	0.00
Orders	11,213.06	6	1,868.84	43.00	41.28	0.00
Invoices	3,592.52	3	1,197.51	19.00	15.48	0.00
Collections	117.98	1	117.98	9.00	0.00	0.00
Payments						
Orders	3,614.33	4	903.58	28.00	8.73	0.00
Invoices	3,561.01	2	1,780.51	14.00	15.48	0.00

Day Totals

Week Totals

Last Week

Route Totals

Route totals can also be displayed when the transaction is posted. Limits can be set-up in "Options >> Lookup Lists >> Route Limits"

Route	Name	Cubic	Warn At	Weight	Warn At
0	NO ROUTE	0	0	0	0
1	West London (City 1)	45	40	50	45
2	EC London (City 2)	34	30	50	45
3	Middle City (City 3)	65	60	50	45
4	East London	0	0	50	45
5	SE1	0	0	50	45
6	South London	0	0	50	45
7	Essex	0	0	50	45
8	Kent	0	0	50	45
10	North West	0	0	50	45
11	Locals	0	0	50	45
12	East coast	0	0	50	45
15	Freight	0	0	50	45
56	West Coast	0	0	50	45
99	Manually Pick	0	0	50	45

Route Name

Define Cubic capacity limit for warning or stop at

Define Weight Limit for warning or stop at

Display Daily Route Totals F4

The Daily Route totals can be displayed every time a transaction is posted, if enabled in the "Route" section of system set-up, or by pressing F4.

Credit Card Transactions

When the [Credit Card] button is pressed the customer's credit card details are captured. These details are then stored. The user can either:

1. Save Transaction, for processing by a user designated to validate and process Credit Card transactions.
2. Process immediately.

These options can be restricted in user settings.

Processing Credit Card Transactions F12

When ready, a user can select "Transactions >> Check for Credit Card Transactions" menu option or press F12. The Credit Card Process window will then be displayed:

List of Credit Card Transactions in System

Date	Value	Customer	User
20/11/01 16:56:07	4905.00	ABAP01 A B Applications Limited	SAM
18/11/2001 09:46:45	1621.77	ABAP01 A B Applications Limited	MLTeleSales
18/11/2001 10:01:33	837.84	ABAP01 A B Applications Limited	MLTeleSales
19/11/2001 02:49:54	321.14	SAM01 Customer 1	MLTeleSales

Transaction Details

Date: 20/11/01 16:56:07
 User: SAM
 Customer: ABAP01 A B Applications Limited
 Value: 4905.00
 Card Type: Switch
 Card Number: 3547326363634
 Card Name: Sam Smith
 Issue Number: 3
 Start Date: 2/2001
 End Date: 3/2002
 Notes:
 Phone: 4343 235 35353

Decline Transaction. (Moves file to Decline directory)

Process Transaction. This loads the transaction, as if entered in to telesales module, ready for posting in to Exchequer as an SRI Transaction or a SORP (SOR+SCR).

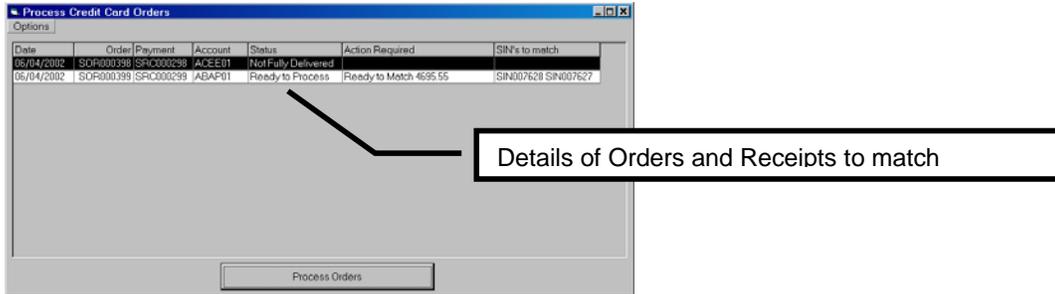
Posting the Credit Card Transaction

When the Credit Card has been accepted, the user can post the transaction as either:

1. SRI (Sales invoice with payment)
 The TeleSales module will then post an invoice with a payment line, which pays the invoice. The General notes contain the Credit Card details.
2. SOR Sales Order with Receipt SRC.
 The TeleSales module will post the Transaction as an order, to utilise the Exchequer Enterprise Sales Order processing, and then a matching Receipt for the credit card payment. The SOR can then be processed in the normal way within Exchequer. Periodically a routine is used to match off the Sales invoices, resulting from the Orders, with the Credit Card Payments. (See next section). The General notes contain the Credit Card details on both the SRC and SOR. Dated notes contain "The payment is for SORxxxxxx" on the SRC and "The order paid by SCRxxxxxx" on SOR.

Matching off the Credit Card Payments

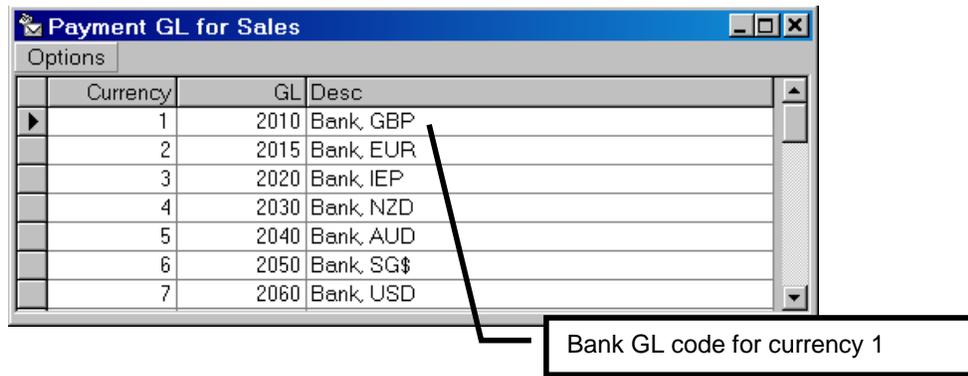
Periodically this process should be run, from either "Options >> Match Off Payments" TeleSales menu or by running ProcessMatchPayments.exe (Can be added to the Tools menu of Exchequer Enterprise). This scans the Credit Card orders and Payments. If the Orders have been processed, and the total amount matches the payment, the process matches off the two transactions.



If the order has been processed but is now more or less than the Payment then the program lists the difference. The difference can then be resolved from within Exchequer Enterprise manually.

Payment GL Codes

The payment GL code (Bank accounts) are set up from the "Options >> Lookup List >> Payment GL Codes" menu option. A different code should be defined for each currency the TeleSales module will be used with.



Viewing Additional Information

Viewing Outstanding Order Lines for Customer (Ctrl+A)

The user can quickly view Outstanding Order Lines for Customer from the "Transaction >> View >> All Outstanding Items":

Sort by stock code

Master Link TeleSales : ABAP01 : A B Applications Limited ss : Cr Avail 8,683.92								
Search Transactions Options Help								
All Outstanding Order Lines for Customer								
Sort By Stock code								
TH Date	OurRef	Stock Code_Desc	Qty	O/S	Del	Pick	Line date	
25 Oct 01	SOR000432	FUSE-30AMP-240V, 30 Amp Fuse (240v)nts	2	2	0	0	25 Oct 2	
		MONITOR-COLOUR, Colour Monitorctsnts	3	3	0	0	25 Oct 2	
		DELCHAR-UNDER10, Fast Delivery charge under £10	1	1	0	0	24 Nov 01	
	SOR000431	MONITOR-MONO, Monochrome Monitor	2	2	0	0	25 Oct 2	
		DELCHAR-UNDER10, Fast Delivery charge under £10	1	1	0	0	24 Nov 01	
	SOR000430	COND-B-INSBEND25, 25mm Black Conduit inspector	4	4	0	0	25 Oct 2	
		COND-BLK-25MMX3M, 25mm Black Conduit 3m length	6	6	0	0	25 Oct 2	
		COND-B-TERMBX21, 20mm Black Conduit Terminal	5	5	0	0	25 Oct 2	
		FUSE-30AMP-240V, 30 Amp Fuse (240v)Terminal Box	2	2	0	0	25 Oct 2	
		DELCHAR-UNDER10, Fast Delivery charge under £10	1	1	0	0	24 Nov 01	
	SOR000429	FUSE-30AMP-240V, 30 Amp Fuse (240v)nts	2	2	0	0	25 Oct 2	
		DELCHAR-UNDER10, Fast Delivery charge under £10	1	1	0	0	24 Nov 01	
	SOR000428	FUSE-45AMP-240V, 45 Amp Fuse (240v)nts	1	1	0	0	25 Oct 2	
		BULB-SC-PE-40W, 40W Pearl Light Bulb, SC - 4 Pack	3	3	0	0	25 Oct 2	
		WAL-IR-T-C135-60, Wall Light, Iron - C135 - Twin Lamp	2	2	0	0	25 Oct 2	
		MONITOR-MONO, Monochrome Monitor C135 - Twin L	1	1	0	0	25 Oct 2	
		ALARMSYS-DOM-3, Domestic Alarm System, Model :	1	1	0	0	25 Oct 2	
	SOR000427	ALARMSYS-DOM-5, Domestic Alarm System, Model :	2	2	0	0	25 Oct 2	
		DELCHAR-UNDER10, Fast Delivery charge under £10	1	1	0	0	24 Nov 01	
		BULB-SC-PE-40W, 40W Pearl Light Bulb, SC - 4 Pack	1	1	0	0	25 Oct 2	
	SOR000426	DELCHAR-UNDER10, Fast Delivery charge under £10	1	1	0	0	24 Nov 01	
		BAT-1.5AA-ALK, 1.5 v AA Battery (4 pack)	3	3	0	1	25 Oct 2	
		FUSE-45AMP-240V, 45 Amp Fuse (240v)4 pack)	4	4	0	0	25 Oct 2	
		MONITOR-MONO, Monochrome Monitor4 pack)	2	2	0	1	25 Oct 2	
	SOR000425	DELCHAR-UNDER10, Fast Delivery charge under £10	1	1	0	0	24 Nov 01	
		ALARMSYS-DOM-3, Domestic Alarm System, Model :	2	2	0	0	25 Oct 2	
		ALARMSYS-DOM-5, Domestic Alarm System, Model :	3	3	0	0	25 Oct 2	

Viewing Back Orders (Alt+B)

While the cursor is on a stock item the user can view any back orders on the system for the item by pressing Alt+B:

Back Orders for SENS-PIR					
Date	OurRef	Supplier	O/S	Qty on	Location
31 Mar 00	POR000246	RSCO01, RS Components Limited	20	20	MAI, Maintenance Department
31 Mar 00	POR000246	RSCO01, RS Components Limited	20	20	MAI, Maintenance Department

Customers Orders waiting					
Date	OurRef	Supplier	O/S	Qty on	Location
20 Oct 01	SOR000408	#ACK01, UTE ACKERMANN	10	10	MAI, Maintenance Department

Setting up lookup lists

Set-up Delivery Charges

Delivery charges can be set-up from "Options >> Lookup Lists >> Delivery Charge List" menu option:

The screenshot shows the 'Delivery Charge Lists' window with the following components and callouts:

- Options Table:**

Enabled	Description to appear in Selection List	Charge based on	CU Account Type	CU Area
<input checked="" type="checkbox"/>	Normal Delivery	Value		
<input checked="" type="checkbox"/>	Special Fast Delivery	Value		
<input type="checkbox"/>				
- Callout 1:** Delivery Enabled and description to appear in selection box (points to the 'Enabled' and 'Description' columns).
- Callout 2:** Auto Select Delivery charge by Value, Weight, Cubic capacity and Distance (points to the 'Charge based on' column).
- Callout 3:** Enter Customer Type or area if you want to tie the Delivery charge to a particular type of customer (points to the 'CU Area' column).
- Main Table:**

Max	Charge	Description to appear in Order	Stock code booked	Warning displayed if selected
0	15.00	Fast Delivery charge under £1000	DELCHAR-UNDER10	
1000	45.00	Fast Delivery charge over £1000	DELCHAR-UNDER10	
- Callout 4:** Stock code to book to. Description only recommended (points to the 'Stock code booked' column).
- Callout 5:** Description to appear at bottom of transaction (points to the 'Description to appear in Order' column).
- Callout 6:** Delivery charge (points to the 'Charge' column).
- Callout 7:** Value to select on. In this example, if value is over 1000 then will select the second line (points to the 'Max' column).

The default Delivery charge can be set in "System Set-up" under the "Charges" Tab.

Set-up Messages

Messages can be set-up from "Options >> Lookup Lists >> Message List" menu option:

Message Enabled and description to appear in selection box

Message to appear on the bottom of the Transaction if selected

Enter Customer Type or area if you want to tie the Message to a particular type of customer

Options	Enabled	Description to appear in Selection List	Message at bottom of Transaction	AccountType	Area
	<input type="checkbox"/>	-1 Christmas Message	<input type="checkbox"/>		
	<input checked="" type="checkbox"/>	Terms	<input checked="" type="checkbox"/>		

Defining Selection Lists

These lists are defined in the "Options >> Lookup List >> Telesales List" menu option:

Enable the entry. Disabled items will not be shown.

Show on Special Offer List

Order in which to appear

Name of list to appear

Stock record field which matches value to appear on List. For Example STUser1=2001 (see below for list)

Enter Customer Type or area if you want to tie the List to a particular type of customer. Must be turned on under the "List" tab of system set-up

Options	Enable	Special Offer List	Order	Description to appear in Selection List	Matching field	Match Value	CU Account Type	CU Area
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	Fuses	STParentCode	Fuses		
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	LIST OF SPECIAL OFFERS	STUser1	S		
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	Sam's List	STUser1	SAM		
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	Batteries	STParentCode	BATTERIES		
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	This Years Sales List	STUser1	2001		
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	AT Customers	STUser1	CUAccountType		AT
*	<input type="checkbox"/>	<input type="checkbox"/>			STDesc6			
					STStockCode			
					stAltCode			
					StBarCode			
					STUser1			

Note : This feature uses the same index as the Word Search feature. Therefore you can match on STUser1=2001, but STUser1 could have a value of "2001 2002 2003". Each word will be seen as a different value. ●

Matching Fields:

STDesc1-6	STCC	STStockCode
STDep	StAltCode	STWebCat
StBarCode	STAltCodeDB	STUser1-4
STParentCode	STSupp	STBins
		STLoc

System Set-up

System Set-up is accessed through the "Options >> System Set-up" menu option. This is only available to users who have access to the Exchequer Enterprise "Utilities" menu.

Header Options

TeleSales System Setup : Electrics 'R' Us

Header

Enable section on Header:

Delivery Address

Delivery Address DB

Put Delivery Contacts name in: THUser3

Copy over the Contact name, from account record, to Delivery address

Enforce Entry:

ANC Srv

User Def 2

User Def 3

Your Ref

Alt Ref

Other:

Warn if account is not Currency 1

Enable the Delivery address section of the Header

Hide or show the Delivery DB button

The 'Contact' name can be posted to Transaction Header fields AltRef or THUser3. This can be placed on the Exchequer form layouts

Enforce Header fields

If account is not currency 1 then warn user

Line Options

TeleSales System Setup : Electrics 'R' Us

Lines

When selecting an item:

don't use Stock Description 1

don't use Stock Description 2

don't use Stock Description 3

don't use Stock Description 4

don't use Stock Description 5

don't use Stock Description 6

Use Desc line x for form set (allows different languages for stock descriptions)

Warn if on order already (checks last 2 items only)

Show Description Only Items

Margin:

Warn if Below: 10 % margin

Hide Margin and cost price

Warn if below Cost

Don't allow below cost

Discount:

Treat 'Discount' Field as percentage

NOTE: When this is on do not enter amount discounts in price matrix because they will be treated as percentage discounts

Theoretical Pallet Quantity:

Warn TPO if "WARN" in: CUUser1

TPO stored in: STUser4

Left hand column, of grid, displays:

On all Grids: Stock Code, Description

OK Cancel

Don't use a particular stock description line

Use description line corresponding to the Form Number. Allows different language description for stock items

When selecting item check and warn if already on order

Warn if below cost price

Hide Margin and warn if you are selling item less than x percent Margin

Make discount field always accept discount as percentage else works same as Exchequer. **DO NOT USE AMOUNT DISCOUNTS IN PRICE MATRIX WHEN SWITCHED ON**

Set up Theoretical Pallet Qty warning

On grids, left most column, show:

1. Stock code
2. Description
3. Stock code, Description
4. Stock code NL Description
Two line display

Footer Options

Enable section on Footer:

- General Notes
- Message 2 (free flow)
- Links
- Line Total breakdown

Message List:

- Enable
- Enforce Entry
- Default message: Terms

Delivery Charges:

- Enable
- Enforce Entry
- Default charge: Special Fast Delivery

Based on Cubic Capacity:

- Put Cubic Capacity in: None
- Get Cubic Capacity from: None
- Cubic Units: Cartons
- Put Total in: THUser1

Based on Distance:

- Distance Stored in: None
- Distance Units: km
- Ask for Distance

OK Cancel

Cubic Capacity

A Delivery charge can be based on the cubic capacity of an item. The cubic capacity is specified on the stock record and can be posted to one of the Transaction Line user fields. This is set under the "Charges" tab of system set-up:

Based on Cubic Capacity:

- Put Cubic Capacity in: TLUser1
- Get Cubic Capacity from: STUser1
- Cubic Units: Cartons
- Put Total in: THUser2

Distance

A Delivery charge can be based on distance to a customer. The distance is specified on the account record. This is set under the "Charges" tab of system set-up:

Based on Distance

- Distance Stored in: None
- Distance Units: km
- Ask for Distance

Posting Options

Hide Button on Confirmation Window:

Post Transaction e-mail Credit Card
 Print Save

Allow Order if (Transaction put on Query and message sent)

on Stop Account closed
 on Stop (see Notes, but display)
 Put on 'Credit Hold' if over credit limit, else don't allow order posting
user must Save transaction to file or don't go over limit

When processing Credit Cards:

SRI, Process as Sales Invoice with Receipt
 SORP, Process as Sales Order SOR and post Receipt SRC
use "ProcessMatchPayments.exe" to match on these transactions
 Put Credit card details in General notes

When posting Transaction:

Ask for Dated notes after posting Warn if items are out of stock
 Display User Totals Don't allow stock to go negative on Invoices

Options when posting payment line: **For Collections (SQU):**

SRI: Put date in "Pay-in-Ref"
 Enforce "Pay-in-Ref" entry Put: COLLECT in THUser3
 Enforce "Chequer Number" entry

Payment line:

CC: AAA Dep: AAA

OK Cancel

Hide or Enable buttons on the confirmation window

Enable options when account is on stop or over the credit limit

When processing Credit Card Payments allow post as SRI or SORP (order with payment) See section on "Credit Card Payments"

After posting

1. Ask for dated notes
2. Display user totals for day
3. Warn if items are out of stock
4. Allow/Disallow negative stock when posting Invoices

When asking for payment details enforce these fields

When Posting a Collection (SQU) put "COLLECT" in field

CC/Dept for payment line

CRM options

The TeleSales module can pop-up field values read from the current record displayed within the CRM package (Goldmine/ACT). Thus if used in conjunction with Goldmine, a warning or notes can be entered in a field so when the user processes an order, a pop-up can be displayed with what ever is in the field in Goldmine.

Show message from CRM Fields:

When Selecting Account: Contact2->UWARNING Test

Before Processing Transaction: Test

After Posting Transaction: Test

General Options

- Sort Transaction by
1. Group; Stock code
 2. Stock Code
 3. Stock User 1
 4. Stock User 2
 5. Stock User 3
 6. Stock User 4
 7. Stock User 5

Telesales to stay on top. Close or hide when finished

Define how lists are selected

Name the layouts that can be selected

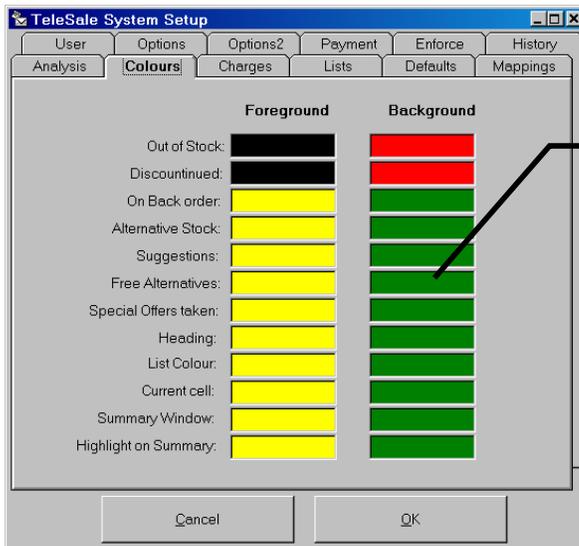
Mapping Account fields to Transaction

Fields from the Account record can be mapped to the Transaction so the values are posted in the Transaction record. These can be set under the "Mappings" tab of system set-up:

Display extra fields from stock record	
	Heading
Field1: STUser1	User 1
Field2: STDesc2	User 2
Field3: None	
Field4: None	
Field5: None	

Changing Colours

The grid colours can be set under the “Colours” tab of system set-up:



User Settings

User Options can be set under the “Options >> User setting” menu option of system set-up:

Allow zero sales price

Enable Zero Sales prices and Overall discount button on Footer returns

Hide Tabs on TeleSales window to simplify

Define the type of transactions allowed

Enable users to

1. Save Transaction to file
2. Edit posted Transactions
3. Allow account record edit
4. Prompt for special prices before posting

Allow CASH account button ●

Enable Credit Card Transactions

Add/Delete users. The “Default user” options are used if new undefined user logs into system

- Uses the SRI account set in the Exchequer Enterprise User Profiles.

Note: If enabled each user should have a default location, cash account and CC/DEP set-up in Exchequer Enterprise password settings.

Requirements

The TeleSales module requires very fast access to the Exchequer Database. We therefore recommend that it be used with a non-congested 100MPS network. For more than 4 users (of Exchequer and the Telesales module) use the Exchequer Client Server engine.

Each workstation should have NT, XP or Windows 2000, due to their superior stability, with 128Mb RAM and Pentium III 850 or better.

SVGA (800x600) displays or larger

Exchequer Enterprise SPOP module to enable order processing.

Exchequer Enterprise Telesales module enabled to view "History" tab

The ODBC Module to be enabled to view "History" tab and file Links.

Optionally Master Link and Goldmine (or ACT, or Maximiser) to front the telesales operation.

The TeleSales Module requires the use of TLUser 4 and THUser 4

Speed Test

To provide a feed back on the speed of a system a benchmark test is available from "Help >> Utilities >> Speed Test". This should be run from a fresh reboot. The results are placed on the clipboard.

```
Computer:DEV2
Database:D:\431\demo
Create 1000 lines to sort: 0.841
Sort 1000 lines in memory : 0.05
Create 5000 lines to sort: 1.121
Sort 5000 lines in memory : 0.161
Create 10000 lines to sort: 2.694
Sort 10000 lines in memory : 0.36
Releasing memory: 31.846
Read 1000 Transaction lines : 2.003
Read 10000 Transaction lines : 8.072
```

Restrictions

The TeleSales module does not support:

1. Two lines on an order with same stock code. Due to design this is not allowed
2. Job Costing. Not part of requirements
3. Bill of Materials (may do in future), including the ability to optionally select sub components
4. Stock placed in the root of the stock tree will not be shown in the "Tree" view
5. Serial number tracking

Appendix

Keys

F3	My Totals
F4	Daily Route Totals
F8	Load Transaction
F9	Save Transaction
F11	Edit Stock record
F12	Process all card transactions which have been stored
Alt + R	Rollup window
Alt + 1-4	Switch Grid Layouts

Ctrl + A	View All Outstanding Orders for customer
Ctrl + B	View Back orders for currently selected stock
Ctrl + W	New Transaction
Alt + E	Expands the related information window
Alt + S	Display Suggestions/Alternatives for stock item

To switch between Tabs:

Alt + H	Header
Alt + A	Add Stock Item
Alt + L	Select from Sales list
Alt + R	Select from Tree
Alt + I	Select from Sales History
Alt + C	Word search
Alt + P	Special Offers
Alt + T	View Transaction
Alt + F	View Footer

While On Header:

Alt + D	Book to Direct Account
Alt + G	Get Contact from GOLDMINE/ACT
Ctrl + E	Search for account by Account code
Ctrl + P	Search for account by Post code
Ctrl + T	Search for account by Alt Ref
Ctrl + N	Search for account by Name

While in the Suggestions window, move to:

Ctrl + R	Replacement item
Ctrl + O	Offer item
Ctrl + F	Free item
Ctrl + S	Suggested Item
Ctrl + A	Alternative item

Files used

The TeleSales program uses the following files:

Files which can be run:

TeleGold.exe	Run from Goldmine by passing Master Link
TeleAct.exe	Run from ACT by passing Master Link
TeleGold.exe	Run from Maximiser by passing Master Link
TeleExch.exe	Run from Exchequer Enterprise Tools menu to activate from within Exchequer Enterprise
TeleIndex.exe	Update Search Index used by TeleSales Module
TeleSched.exe	Schedules the index over night (7 am by default)
Repair.exe	Repair/Compact Database files
ProcessMatchPayments.exe	Match off Orders with Credit Card Payments
TelePlugin.exe	TeleSales Plug-in, enables the Delivery Database in Exchequer Enterprise and updates the Stock Search Index as changes are made to Stock records.
TeleOpen.exe	Associated with “.qlk” files which link the TeleSales module to quotes in GOLDMINE/ACT

Other files:

MLTEL.TXT	If this file exists, then the TeleSales menu options are enabled in Master Link
NO_NT_WARNING.FLG	Create to stop NT warning message being displayed on Windows 95/98 and ME
NO_LOCAL_WARNING.FLG	Do not warn if not Client/Server
DEBUGMODE.FLG	Put in Debug mode
TeleSales.exe	TeleSales main program
GetTeleSalesHistory.exe	Gets TeleSales History for account in background

Settings:

TeleSale.DAT	Stores the System settings †
TeleInfo.DAT	Stores the settings for the Info Window
TeleCRM.DAT	Stores the GOLDMINE/ACT link information. Delete to reset.
TeleComp.DAT	Stores the Exchequer companies to interface with. Delete to reset.
TelePlug.DAT	Settings for the TelePlugin.exe
TeleIndex.DAT	Last Date the full index was performed
TeleSales1_1.grx	Saved grid layouts
TeleSales4_1.grx	Saved grid layouts Bottom Grid

Databases:

TeleSalesG.mdb	contains Lookup Lists †
TeleSalesC.mdb	contains contact information (Delivery addresses)
TeleSalesS.mdb	contains Word search index †
TeleSalesT.mdb	contains Users/Route totals

Logs:

Master Link logs various information to text files. These files list User, Machine, Time, date, error or activity:

Activity1.log	General Activity
Error1.log	Fatal Errors
TeleSave1.log	List of Transactions saved to file
TeleIndex1.log	Search re-index Index activity
Settings0.log	Text description of system settings †

In the reports directory are various Crystal 8 reports which can be modified.

† these files are numbered for each company the TeleSales module is used with.

Starting the TeleSales Module

The TeleSales Module can either be run from:

1. Master Link, automatically added to the Master Link "Trans" menus
2. From within Goldmine, ACT and Maximiser without running Master Link first.
3. From the 'Tools' Menu within Exchequer Enterprise
4. Run from the Desktop

Option 1, from Master Link

Simply install and configure Master Link, the "Trans" menu option will be available from menus. If they are not available then create a text file called "MLTEL.TXT" in the MLink directory.

Option 2, From Goldmine, ACT or Maximiser

Define Menu option or button to run TeleGold.exe, TeleACT.exe or TeleMax.exe. This will cause the TeleSales Module to be displayed with the current account set to the account currently displayed in Goldmine/ACT/Maximiser. If no account code exists in the designated field for Exchequer account code, then the transaction will be booked to the cash account (default CASH01, set in Exchequer per user) if turned on in user settings.

The Telesales Module can be forced to start a particular type of transaction by using "TeleGold.exe /SOR:" for sales order.

Note: This does require Master Link to be active.

Option 3, Activating Master Link TeleSales from Enterprise

The Master link TeleSales module is intended to be used with Master Link in conjunction with a CRM Package (ACT or Goldmine). The Module can be used as a standalone module being activated from within Exchequer Enterprise.

To Install use the ComTek CD-ROM. Install Master Link into a MLINK sub-directory of Exchequer Enterprise. Then add "TeleExch.exe" to the Tools menu within Exchequer. When activated it will run the Master Link TeleSales Module, and ask for transaction type, from within Exchequer Enterprise.

"TeleExch.exe /SOR:" will active TeleSales module for an Order

Option 4, Activated from Desktop

Simply create a shortcut to TeleOpen.exe. Double click to open TeleSales module.

"TeleOpen.exe /SOR:" will active TeleSales module for an Order

"TeleOpen.exe /SOR: OLE:ELEC01" Run with company OLE code ELEC01

Note : You must have Exchequer Enterprise installed, but not necessarily running, on the PC to use the TeleSales module and have performed the SetupWKS.exe in the MLink directory.

Multiple Companies

Master Link TeleSales will work with more than one Exchequer Company. If used with Master link, set-up the multiple companies in Master Link and then activate the TeleSales module. If used as a module from within Exchequer Enterprise then the TeleSales module will automatically track the companies with which it is asked to interface. The companies define to work with can be viewed in the "Help >> About" window.

Updates:

Updates:

Because many of the above files are in use during the day, it can be difficult to upgrade files. If a file is placed in the "Updates" sub directory of theMLINK directory then the file will be copied to the MLink directory by the SCHED.EXE (over night). Updates\Upgrade.log will list files updated.

<http://www.comtekaccounts.com/TeleSales/downloads.htm>

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