DBS
Database Business Systems

Menu 33: Telemarketing

Contents

MENU 33: TELEMARKETING

Table of Figures

Menu 33   Telemarketing

```
MENU-33                          TELEMARKETING MENU
 13:44:02  27 Jun 1998                                        1 JSS.TEST dbs
  1. Telemarketing Notes
  2. New Order Entry
  5. Inquiries Menu
  6. Telemarketing Memo Report
  7. Delete Telemarketing Notes
  8. Invoice/Credit Memo Reprint
 15. Mail List Maintenance
 16. Gross Profit Report
 16A.Totals Only
 17. Ship.To Inquiry
 18. Sales Analysis Functions
 21. Johnstone Messages
 24. Timecard Calculator
 25. Port Control
 26. Select Printer
```
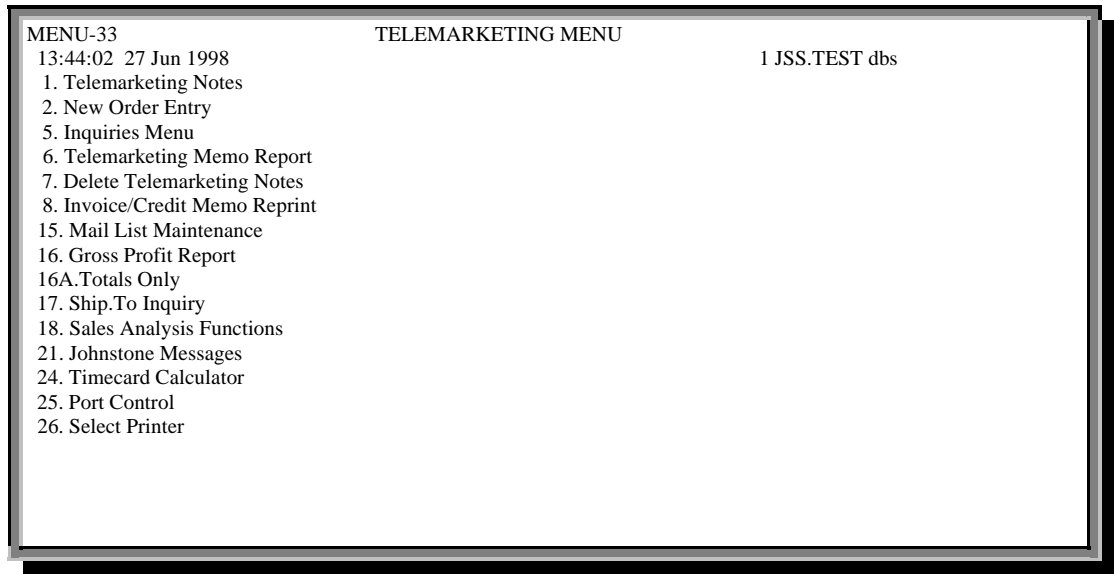
Figure 33-1. Telemarketing main menu

Purpose

Salespeople use this menu as a tool to view and maintain customer contact and product information, place orders, enter notes, use inquiries, and much more. Operator codes can be set to directly log onto this menu, bypassing the main menu.

33.1 Telemarketing Notes

Track sales contacts and add associated notes and memos.

a.   Enter a company number or **Enter** for all.

b.   Enter a customer number. Use '*L*'ookup to find the number in Customer Lookup Inquiry. Other options are '*LM*' to access the Mailing List Lookup Inquiry and '*OE*' for Order Entry & Invoicing.

c.   **Enter** to confirm the selected customer number.

```
1234                      LST.ORD    06/07/98      AR    3567.78
283-2513                  MTD       10941.22       LIMIT    9999999
1234 TEST                 YTD       10941.22       TERMS NET 10TH FOLL
700 N. HAYDEN ISLAND DR   LY        2377.78        LST.CONTACT 06/29/98
SUITE 250                 OPENED     03/22/93   15. NEXT CONTACT 03/01/98
***                       MAIL.LIST    111111    16. FREQUENCY        123
PORTLAND OR  97217-0001    001 SALESMAN ONE          CL 0b      TY 01
 1. SALES CONTACT just a new nonw one
 2. NOTES  test of a new line
 3. NOTES
 4. NOTES
 5. NOTES
 6. NOTES
 7. NOTES
 8. NOTES
 9. NOTES
10. NOTES
11. NOTES
12. NOTES
13. NOTES
14. NOTES

Stock status, Line#, Memos, Items, OE, <Enter>, Backout, 0 to accept, Previous:
```

Figure 33-2. Telemarketing notes

    d.   Select from the prompt line:

STOCK STATUS, LINE**#**, MEMOS, **I**TEMS, **OE**, <**ENTER**>, **B**ACKOUT**, 0**
TO ACCEPT, **P**REVIOUS:

Stock Status	Access Stock Status Inquiry (Menu 19.6).
Line#	Select a line number to add a note, next contact or frequency.
Memos	Access Memos screen (Fig. 33-3) to edit (enter line number) a memo, '*a*'dd a new memo, or view '*n*'ext or '*p*'revious screens of memos.
Items	View item number or '*a*'ll items (Fig. 33-4). The screen displays item transactions for a specific customer.
OE	Access Order Entry & Invoicing (Menu 1.2).
Backout	To exit screen without saving any changes.
0 to accept	To accept and then enter next customer number.
P	To access previous screen.

```
                    Telemarketing Memos for Customer 1234 1234 TEST
001  06/29/98  TESTING THE CHANGING OF AN EXISTING MESSAGE LINE TO SEE
               WHAT HAPPENS WITH THE DATE.

002  06/29/98  testing the adding of a new line.  this should be the
               bottom last message line for now.  wanting to add a line to
               see what happens

003  06/29/98  this is now the last line
```

```
     Next, Previous, Line#, Add, <Enter>
```

Figure 33-3. Memos

```
1234                          LST.ORD    06/07/98   AR   3567.78
283-2513                      MTD       10941.22         LIMIT    9999999
1234 TEST                     YTD       10941.22         TERMS NET 10TH FOLL
700 N. HAYDEN ISLAND DR       LY        2377.78          LST.CONTACT  06/29/98
SUITE 250                     OPENED    03/22/93    15. NEXT CONTACT 03/01/98
***                           MAIL.LIST  111111      16. FREQUENCY      123
PORTLAND OR  97217-0001    001 SALESMAN ONE           CL 0b    TY 01
 1. SALES CONTACT Test of a new line
 2. NOTES  test of a new line
B10-016       06/07/98 01100922001 INV   1      50.51
   GL7 THERMOSTAT KIT
B10-093       07/02/98 01100920001 INV   1      10.99
   PSG-4MF SIGHT GLASS
B10-092       07/01/98 01100918001 INV   1      10.99
   PSG-4 SIGHT GLASS
B10-092       07/01/98 01100917001 INV   1      10.99
   PSG-4 SIGHT GLASS
B10-360       06/30/98 01100915001 INV   1      12.00
   TEST PART
S88-004       06/30/98 01100916001 INV   1      88.76
   G303 MOTOR

Stock status, Line#, Memos, Items, OE, <Enter>, Backout, 0 to accept, Previous:
TMKT.NOTES
```

Figure 33-4. Items screen

33.2 New Order Entry

Access Order Entry and create orders from the Telemarketing menu.
Please reference Menu 1 for complete instructions.

33.5 Inquiries Menu

Access the Inquiry Menu; please see Menu 19 for complete instructions.

33.6 Telemarketing Memo Report

Print report of telemarketing memos based on specific selection criteria, for one or all customers.

a.   Enter a company number or **Enter** for all.
b.   Enter a beginning date or **Enter** for all.
c.   Enter a salesperson number or **Enter** for all.
d.   Enter a customer number or **Enter** for all.
e.   Enter a beginning zip code or **Enter** for all.
f.   Choose a sort method:

> 1. SALESMAN NUMBER/CUSTOMER NAME
> 2. CUSTOMER NAME
> 3. ZIP CODES

```
21:30:02 01 Oct 1998  ---  Telemarketing memos entered beginning ALL and ending ALL  ---  Page   1

SLS. DATE.....   CUST NO..        CUSTOMER NAME............... MAILER. MEMO.............................................PF

002              GOOMBA           GOOMBA SAFARI SUPPLY
002              000220           JEFF'S APPL.                        000220                            P
000              1020A            SPS COMMUNICATIONS CORP             500295
```

Figure 33-5. Telemarketing Memo Report

33.7 Delete Telemarketing Notes

Delete telemarketing notes based on input date.

a.   Enter date (MM/DD/YY) from which to start deletion.
b.   Type *'y***'* to proceed.

33.8 Invoice/Credit Memo Reprint

Reprint invoices and credit memos (same as Menu 1.10).

a.   Choose to print in order in line number ('*L*') or alphabetic part number ('*A*') format.

b.   Enter a release number (separate several with ';').

c.   Choose to reprint an invoice (**1**) or pick ticket (**2**).

d.   **Enter** to print prices; otherwise type '*n*.'

33.15 Mail List Maintenance

Customer contacts often stem from the mailing list. Use this menu to maintain, delete, or add names to the mailing list. To access Label Maintenance, please reference Menu 12.2.37.1 for complete instructions.

```
LABEL MAINTENANCE

 MAILER #        ------
 * 1. SLD TO NAME
 * 2. SLD TO ADD1
  3. SLD TO ADD2
  4. SLD TO ADD3
 * 5. CITY
 * 6. STATE                    * = TRANSMITTED TO CORP
 * 7. ZIP CODE
 * 8. ATTN:
  9. PHONE
 10. TYPE
 11. CLASS
 *12. CUST
 13. SLSM INSIDE
 14. SLSM OUTSIDE
 15. COMP #
 *16. CAT FLAG
 17. SIC CODE
 18. TERRITORY
 19. FAX #
```

Figure 33-6. Label Maintenance

33.16 Gross Profit Report

Print a gross profit report.

a.   Select a printer destination.
b.   Enter a company number or **Enter** for all.
c.   Enter a customer type or **Enter** for all.
d.   Enter a customer class or **Enter** for all.
e.   Enter a sales number or **Enter** for all.
f.   Enter a fiscal period to report (YYMM).
g.   To print addresses type '*y*'; otherwise '*n*.'

Separate several entries with a semicolon (;).

```
22:05:45 07 Jul 1998   GROSS PROFIT REPORT FOR Database Business Systems   OPTIONS: ALL, ALL, 9801   STORE: ALL COMPANIES   PAGE   1

CUST.   CUSTOMER NAME          :<--------- PERIOD 9801 --------->:<--------- YEAR TO DATE --------->:<-LAST YEAR--->
NO.                            CL TP : SALES   COST    G.P.   %  : SALES   COST    G.P.   %  : SALES      %
           :                     ::               :                          :
------------------------------------------------------------------------------------------------------------------
     *** PORTLAND, OR  99999

   C.O.D. NON-TAXABLE
 CASH  CASH NON-TAXABLE          0Z 0Z  161.82   45.48  116.34  71.9  161.82   45.48  116.34  71.9  242.96  32.9

     ***
   PORTLAND, OR  99999

   CASH NON-TAXABLE
 CASHT  CASH TAXABLE             01 01  -56.58  -24.68  -31.90  56.4  -56.58  -24.68  -31.90  56.4    1.49  68.5
 CRAFTY  CRAFTY CRITTERS         0B 01    0.00    0.00    0.00   0.0    0.00    0.00    0.00   0.0    0.00   0.0
     123 TREE LANE
     PORTLAND, OR  97220
     503- NO-WAY   FINGERS
     DOESN'T EAT MEAT
  555  CUSTOMER MERGED INTO      01 BR    0.00    0.00    0.00   0.0    0.00    0.00    0.00   0.0    0.00   0.0
     ADDRESS
     PORTLAND, OR  00000
     000-000-0000
     PORTLAND, OR  97217
     503-283-2513
     MEMBER RUSH FAN CLUB
 OCKPORT  GOLDEN LAB             RW MB    0.00    0.00    0.00   0.0    0.00    0.00    0.00   0.0    0.00   0.0
     45 BOW WOW
     PO BOX 15
     DOGPOUND, WA  98532
     206-892-4486
     LIKES MEATY BONE
 GOOMBA  GOOMBA SAFARI SUPPLY    02 01  219.50  136.38   83.12  37.9  219.50  136.38   83.12  37.9  7584.45  34.1
     12340 MUD STREET
     LAST LOG ON LEFT
     P.O. BOX 1
     KAMPALA, GA  12345-1234
     123-123-1234  1GET
```

Figure 33-7. Gross Profit Report

33.16A   Totals Only

Print Gross Profit Report (previous menu) with totals only.

a.   Enter a company number or **Enter** for all.
b.   Enter a customer type or **Enter** for all.
c.   Enter a customer class or **Enter** for all.
d.   Enter a sales number or **Enter** for all.
e.   Enter fiscal period (YYMM).

```
22:09:45 07 Jul 1998  GROSS PROFIT REPORT (TOTALS ONLY) FOR Database Business Systems  OPTIONS: all
9801  STORE: 01  PAGE   1

                    :<--------- PERIOD 9801 --------->

                    : SALES    COST    G.P.   %                        :
--------------------------------------------------------------------------------


                    ================================
        GRAND TOTAL        18090.54  6377.75  11712.79  64.7
```

Figure 33-8. Gross Profit Report

33.17 Ship-to Inquiry

View ship-to information for a specific customer.

▪ Enter a customer number for ship-to information.

```
22:10:52 07 Jul 1998 - SHIPTOS FOR 123                          PAGE   1

001
JEFF***
SEND IT FAST TODAY
VANCOUVER, WA  98661




[405] 1 items listed out of 1 items.






PRESS <CR> TO CONTINUE...
```
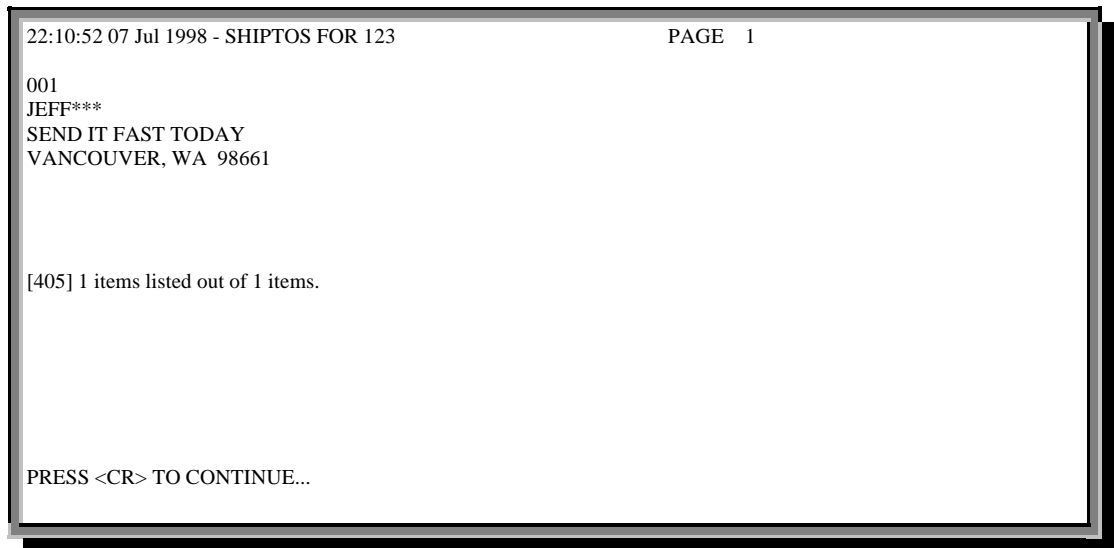
Figure 33-9. Ship-To information

33.18 Sales Analysis Functions

See Menu 11 for complete instruction on sales reporting.

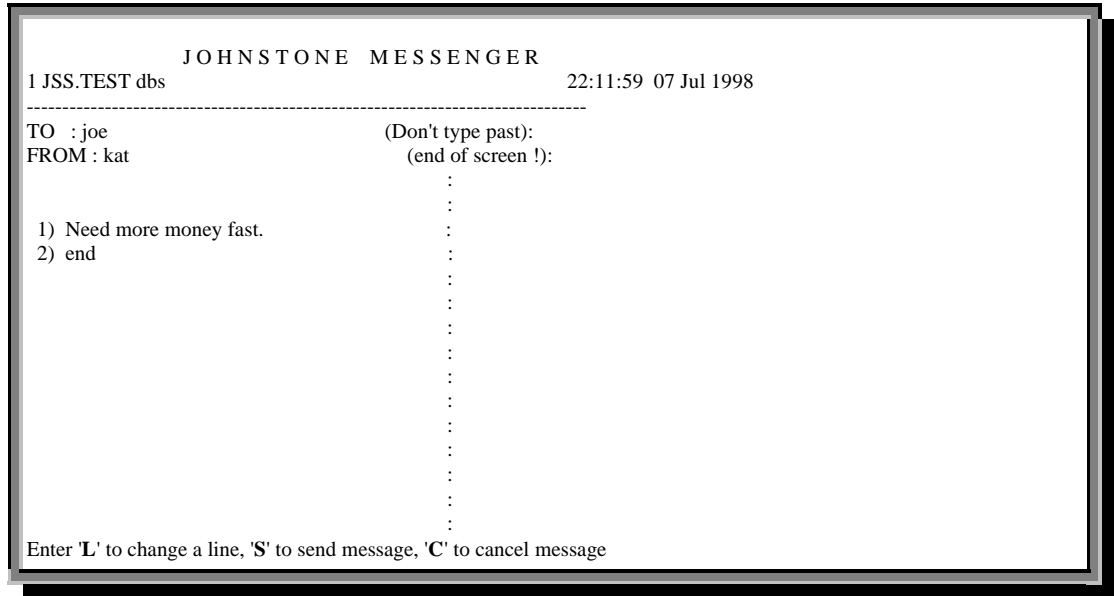## 33.21 Johnstone Messages

Create, edit, send, and print a message.

a. Select a printer.
b. Enter your name.
c. Enter receiver's name.
d. Enter message line. Then **Enter** or '*end*.'
e. Other options:

'*L*' to edit a message (line)
'*S*' to send message (returns to menu)
'*C*' to cancel your message

```
              J O H N S T O N E   M E S S E N G E R
1 JSS.TEST dbs                                        22:11:59  07 Jul 1998
-------------------------------------------------------------------------------
TO  : joe                       (Don't type past):
FROM : kat                         (end of screen !):
                                                    :
                                                    :
 1)  Need more money fast.                          :
 2)  end                                            :
                                                    :
                                                    :
                                                    :
                                                    :
                                                    :
                                                    :
                                                    :
                                                    :
                                                    :
                                                    :
                                                    :
 Enter 'L' to change a line, 'S' to send message, 'C' to cancel message
```

Figure 33-10. Messages

33.24 Timecard Calculator

Enter timecard entries for total time worked.

a. Enter "time in." Use a period (.) for the hour/minute separator, and a dash (-) for "PM."

   Example   **3.00 for 3:00**

                      2.45- for 2:45 PM

b. Enter "time out." The subtotal amount of time for the current in-out cycle appears on the screen.

c. For a grand total and to reset the time accumulator, press **Enter** at the "time in" prompt.

d. Type '*end*' to end the session.

33.25 Port Control

View and maintain port costs and printer assignments. See Menu 12.10 for complete instructions.

33.26 Select Printer

Assign a printer for reports without a printer-selection option. This is also the default printer.

Appendix

Screen Columns

Name	Meaning
AR	Accounts Receivable
CL	Customer class
CUST NO	Customer number
FREQUENCY	Arbitrary assignment for number of contacts.
G.P. %	Gross profit percentage
LST.CONTACT	Last contact date
LST.ORD	Last order date
LY	Orders last year
MAIL.LIST	Mailer number for customer
MAILER.MEMO	Memo file number
MTD	Month-to-date
NEXT CONTACT	Next contact date
PF	"P" flag; from mailer file
SLS	Salesperson's ID number
TERMS NET	A/R terms
TP	Customer Type
YTD	Year-to-date

Index