

Solution-IV™ Accounting Prospect Management



Version 8.81

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1 Introduction

This chapter explains how the manual is organized and how the manual should be used. It also provides you with an overall view of the Solution-IV Prospect Management features.

Thoroughbred Solutions

Thoroughbred Software develops and internationally markets software products for small through Fortune 500 sized businesses. Thoroughbred products are true multi-user solutions and are installed at thousands of worldwide sites.

Solving everyday accounting problems has never been a simple task. Thoroughbred Solution-IV Accounting modules are 4GL-based providing the quality and versatility you need to bring your business accounting needs into and through the new millennium. Thoroughbred software is always at the forefront of our industry's rapidly changing technology. Thoroughbred Solution-IV Accounting sets the pace for 4GL-based applications and is a result of more than 25 years of application development and design experience. This product was built using one of the most powerful 4GL-application development environments available today – Thoroughbred OPENworkshop.

OPENworkshop provides a comprehensive set of productivity tools designed to be easy to understand and use. Solution-IV Accounting is built on top of this robust development platform, which provides the perfect foundation for construction of a feature rich solution to your accounting problems. The Thoroughbred OPENworkshop development environment makes it easy and practical to customize complex applications.

Thoroughbred Solution-IV Accounting is a completely integrated accounting solution. Each module provides a seamless integration and sharing of common data with each of the other modules.

Prospect Management Features

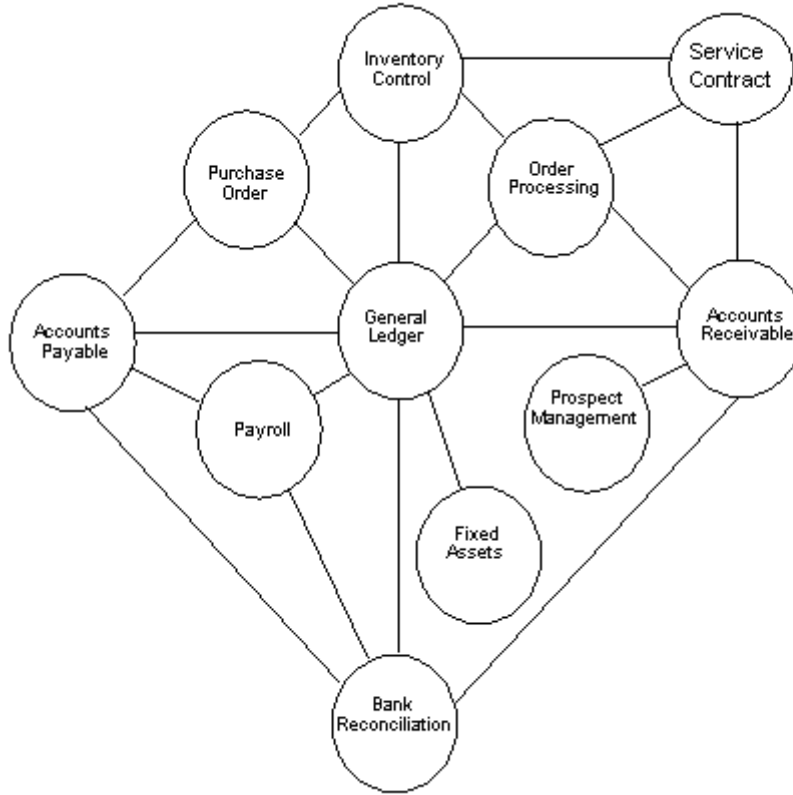
The Solution-IV Prospect Management System was designed to assist the sales staff of a Solution-IV Accounting installation in managing their prospect database. The system will eventually allow for the prospect Masterfile to be stored both on a standalone notebook computer as well as on a UNIX, Linux, or Windows based host environment at the main office.

Prospect Management is integrated with Solution-IV Accounts Receivable, giving the user the option to convert a prospect into a customer, and then enter quotes or orders for the new customer. It is also integrated with the Solution-IV Gateway for Microsoft Office Library, allowing the user to generate form letters for either prospects or any of the alternate contacts.

Other features included are 15 user-definable sort fields, full text field, last and next call dates (which can be updated automatically) and a full "to-do" list complete with text and phone calls to be made.

Thoroughbred Solution-IV Accounting Flowchart

The following System Integration flowchart diagrams how the various Solution-IV Accounting modules relate to one another.



How to Make the Greatest Use of this Manual

Introduction

With this manual we have created reference material that is easy to read, yet contains all of the information you need to set up and run the Thoroughbred Solution-IV Prospect Management system.

This manual will introduce you to the capabilities of Solution-IV Prospect Management, give you ideas to help you get started with the initial setup, provide complete processing instructions, and also serve as a reference guide once you are up and running.

Suggested Steps

In order to make the greatest use of this manual and to provide the easiest transition to your new system, we suggest you complete the following before actually entering your own data into the system.

- **Know how your computer works.** Users who are familiar with the functions of their computer will have an easier time using the system.
- **Read, or at least browse, the entire manual.** Become familiar with the options and capabilities before starting to use the software.
- **Install the system.** Make sure both the programs and demonstration data have been installed on your computer so you can begin looking at the system.
- **Use the demonstration data.** Demonstration data has been provided to allow you to get a look and feel of the operations of the system and reports without using your company's information.
- **Begin using the system.** Use this manual to begin entering and/or converting your information into the Solution-IV Accounting system.

Keep the manual handy. Once you are up and running, you will find the manual helpful as a reference guide. A complete Table of Contents has been provided for your assistance.

2 Prospect Management Menu

This chapter describes the options that are available from the following Solution-IV Prospect Management Main Menu

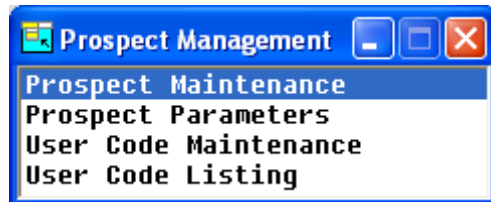
Prospect Management Main Menu

Introduction

The Thoroughbred Solution-IV Prospect Management package allows you to manage your prospect database more effectively.

How to Execute

From the Solution-IV Accounting Main Menu, select **Prospect Management**.



Prospect Management

Prospect Maintenance

This function allows you to maintain all necessary information about a prospect as well as print the various reports.

System Maintenance

Prospect Parameters

This function allows you to customize the Prospect Management System to meet the specific needs of your company.

User Class Code Maintenance

User Class Codes are the specific codes used within each of the various user fields set up in Parameter Maintenance.

User Class Code Listing

User Class Code Listing is a report showing all of the class codes defined for each of the users defined fields you will be using.

Prospect Maintenance

Introduction

This function allows you to maintain all necessary information about a prospect, as well as print the various reports. From this option you maintain general prospect information such as name, address and phone numbers, all of the user-defined fields, alternate contacts, text, and tasks.

This is the core of the Solution-IV Prospect Management System, and the majority of the sales rep's time will be spent here.

How to Execute

From the Prospect Management System Menu, select **Prospect Maintenance**.

The screenshot shows a window titled "Prospect Masterfile Maintenance" for "Lightspeed Reprographics (DEM)" on "12/19/07" by user "TF". The form contains the following fields:

- Prospect Name: Computer Designed Prints
- Address: 135 Westfield Avenue
- City: Winston-Salem
- State: NC, ZIP: 27103, Country: [empty]
- Contact: John Killger
- Phone: 919 555-3320, Ext: [empty]
- Alternate: [empty], Ext: [empty]
- FAX: [empty], Email: [empty]
- Rep: BILL, Bill Blaze
- Last Call: 05/29/01
- Next Call: 06/12/01
- Referred by: [empty]
- Company Type: [empty]
- Hardware Plat: [empty]
- Estimated Usa: [empty]
- Source Code: [empty]

Description of Fields

Rep

The first field that is required is the sales rep. This will set up much of what happens after this point. For example, the "next call" function will pull up the next call for the sales rep entered here. Also, the text field printed on the Task Report uses the sales rep entered here.

Enter a valid sales rep code or press **F2** to display a list of valid sales rep codes. If this is a new sales rep, press **F3** to add the rep to the sales rep file. The sales rep is validated against the Solution-IV Accounts Receivable Sales Rep Masterfile in the company code currently selected.

After entering a valid sales rep code, the cursor will go to the prospect name and the following message is displayed:

Enter prospect or F2-Lookup F3-New F4-End F8-Next call F9-Tasks F12-Sched

Main Prospect Message Options

For prospect, the full or a partial company name, any contact name or phone number can be entered. If there are multiple companies a view will be displayed with the name matches found and the appropriate one can be selected.

F2 - Lookup

Allows a lookup on the following fields:

- ◆ Prospect name
- ◆ Main contact name
- ◆ Alternate contact name
- ◆ City
- ◆ State
- ◆ Phone number
- ◆ Next call date
- ◆ Sales rep

Once found, the appropriate prospect from the displayed list can be selected by pressing **Enter**.

F3 - New Prospect

Allows a new prospect to be added. If an exact duplicate name is entered, the information for that prospect will be displayed and can be changed.

F4 - Exit

Exits the Prospect Maintenance and returns to the Prospect Management System menu.

F8 - Next Call

A prospect will be displayed based on the oldest call from the "Next call date" field in the Prospect Masterfile for the sales rep currently displayed on the screen.

F9 - Task List Report

Displays a screen allowing entry of a date range, task types, status codes and the text field. A report is then printed with the text field, meetings, "to-do's" and all of the calls in the date range for the sales rep currently displayed.

F12 - Reschedule Calls

This option displays another screen and allows you to re-schedule calls for a later date.

Prospect

Once a prospect has been selected, the screen will be filled with the information for that *selected* prospect, and the additional contacts will be displayed below the screen. The cursor will be positioned on the prospect name and the following message displays:

F1-Edit F3-Tasks F5-Contacts F7-Notes F8-User F9-Rpt F12-Conv

Prospect F1 – Edit Options

Allows the user to change any of the prospect information, except the name, contacts, text and user fields (which are changed with a separate function key).

Press **F6** on any of the fields to display the help text for that field.

Fields with special options:

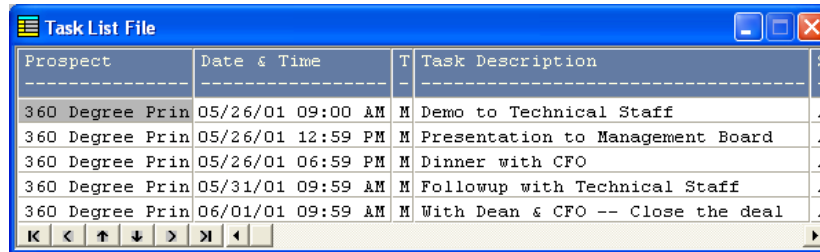
Sales Rep field Allows **F2**-Lookup and **F3**-Maintain file

Next call date Blank date indicates next call date not scheduled

User fields Access these using **F8**

F3 - Tasks

Displays the view shown on the following page and allows maintenance of the meeting, call and "to-do" type tasks required for this prospect.



Prospect	Date & Time	T	Task Description	S
360 Degree Prin	05/26/01 09:00 AM	M	Demo to Technical Staff	A
360 Degree Prin	05/26/01 12:59 PM	M	Presentation to Management Board	A
360 Degree Prin	05/26/01 06:59 PM	M	Dinner with CFO	A
360 Degree Prin	05/31/01 09:59 AM	M	Followup with Technical Staff	A
360 Degree Prin	06/01/01 09:59 AM	M	With Dean & CFO -- Close the deal	A

F4 - Exit

Clears the current prospect from the screen and returns to the initial message.

F5 - Contacts

Gives the user access to the Prospect Contact Maintenance screen (PMSPROS2).

F7 - Notes

Allows the user to add to the prospect notes. This is a standard IDOL-IV text field. It is copied to the Solution-IV Accounts Receivable Customer Masterfile standard comments field when converting the prospect to a customer.

When exiting the notes, the following message will be displayed:

Update last and next call dates?

Y Updates the last call date to today's date, defaults the next call date based on today's date plus the number of days from the Prospect Management Parameters, and allows the user to change the next call date.

N Saves and exits the text field, and returns to the prospect name field.

F8 - User Fields

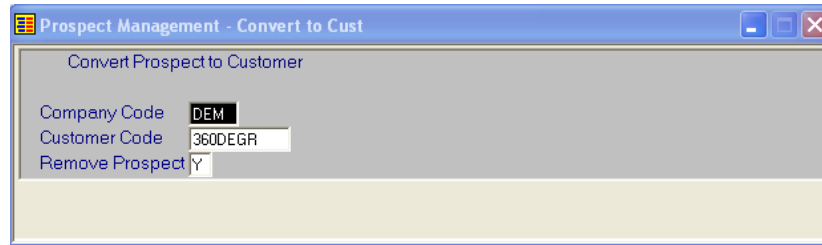
This option gives access to all 15 of the user fields. The descriptions for each of the 15 user fields are maintained in the Prospect Parameters. The codes allowed for each user field are maintained in Class Code Maintenance.

F9 - Report

Prints a report containing this prospect's information, including name, address, phone numbers, user fields, tasks and call notes.

F12 - Convert

Converts the prospect to a Solution-IV Accounts Receivable customer.



Prospect Management - Convert to Cust

Convert Prospect to Customer

Company Code DEM

Customer Code 360DEGR

Remove Prospect Y

The system will generate a default customer code using the first eight characters of the Prospect Name. The user can then override the code. It verifies that the entered code is not already in the Accounts Receivable Customer Masterfile.

The system will then add the prospect as a customer, using information from customer "~DEFAULT~" to fill in the fields that are in the Customer Masterfile (ARFCUST1), but not in the Prospect Masterfile (PMFPROS1). It adds the prospect text field to the standard customer comment field. It also adds all of the prospect contacts to the customer alternate contact file (ARFCUST3). The prospect is deleted from the Prospect Masterfile once added to the Customer Masterfile.

Exit the Screen

When you are finished viewing and maintaining the information for a prospect, press **F4** to return to the Main Message Prompt. When you are finished with all prospects, press **F4** again to return to the Prospect Management System Main Menu.

Task List Report

Introduction

Prints a report combining all tasks from the task file, calls to be made and text for the specified sales rep. The report can be limited by date range, task type and/or task status.

How to Execute

From the Prospect Maintenance Screen Main Message prompt, press **F9** to access the Task List Report Selection Screen.

Description of Fields

Starting Date

Ending Date

Enter the first and last dates you wish to have on the report. If you want the report to contain tasks for only one day, enter that date for both starting and ending.

Print Selected Tasks Types?

You have the option of printing a range or selected task types as follows:

Y Allows you to enter up to five separate task types to print on the report.

N Allows you to enter a range of task types to print on the report.

If you selected to print a range of task types, the system prompts:

From Type

To Type

Enter the first and last task types you wish to print on the report. If you only wish to print one task type, enter it for both first and last. If you wish to print all task types, press **Enter** twice.

If you are entering selected task types, the system prompts:

Selected Task Types

Enter up to five individual task types to print on the report.

Print Selected Status Codes?

You have the option of printing a range or selected status codes as follows:

Y Allows you to enter up to five separate status codes to print on the report.

N Allows you to enter a range of status codes to print on the report.

If you selected to print a range of status codes, the system prompts:

From Status

To Status

Enter the first and last status codes you wish to print on the report. If you only wish to print one status code, enter it for both first and last. If you wish to print all status codes, press **Enter** twice.

If you are entering selected status codes, the system prompts:

Selected Status Codes

Enter up to five individual status codes to print on the report.

Text

Press **F1** to maintain the general text field for this sales rep. This text field may be used as a more general "to do" list for the sales rep of items that may not have something to do with a specific prospect. The text field will be saved between reports, so each time you enter the text field it will look the same as you last left it.

Once your selections are satisfactory, there will be a slight delay as the system merges in the calls with the task file and text.

Exit the Report

When the report is finished, you will be returned automatically to the Prospect Maintenance Screen Main Message Prompt.

Reschedule Calls

Introduction

This option allows you to reschedule calls for a future date. This function is useful if the sales rep has gotten behind on calls either in general or because of a trip or other absence.

How to Execute

From the Prospect Maintenance Main Message prompt, press **F12**.

Description of Fields

Reschedule all calls?

This option is most useful if the sales rep has gotten so far behind in calls that rescheduling calls based on the original call back date no longer makes sense.

- Y** Allows the sales rep to reschedule all calls in the system starting with today's date and spreading the calls evenly over the number of days entered in the next field.
- N** Skips to the date range fields below.

If you select **Y**, the system prompts:

Reschedule calls over x days

Enter the number of days over which you wish to contact all of your prospects.

Starting Date

Ending Date

This function is most useful if only a few weeks worth of calls need to be rescheduled, and they will be merged in with calls already scheduled in the future. Enter the first and last dates in the range that you wish to reschedule.

Number of days to add to original date

Enter the number of days to add to the original call back date.

Example: If you wish to reschedule the calls for two weeks later, enter 14.

Alternate Contacts

Introduction

This option allows the user to maintain an unlimited number of contacts for each prospect. Each of these contacts will be added to the Solution-IV Customer Masterfile Alternate Contacts file when the prospect is converted into a customer.

How to Execute

From the Main Prospect Maintenance screen, press **F5**.

The screenshot shows a software window titled "Prospect Maintenance - Contacts" for "Lightspeed Reprographics (DEM)". The window contains a form with the following data:

Prospect Name	360 Degree Printing		
Contact Code	000001		
Common Name	Dean Lucy		
Full Name	Dean	J.	Lucy
Title	Mr.	Position	President
Address	7623 Newburgh Road		
	P.O. Box 3267		
City	Livonia		
State	MI	ZIP Code	48150
		Country	US
Phone	313 555-9360	Ext	101
FAX	313 591-9365	Email	

Contact Code Message Options

Enter a valid contact code and the information for that contact will be displayed on the screen.

If adding a new contact not already in the contact file, enter up to six alphanumeric characters for the contact code.

- F2** Displays a view and allows the user to select a contact code already defined for this prospect.
- F4** Returns to the main Prospect Maintenance screen.

Once a contact code has been entered, the user may then maintain the information about the contact or use any of the following function keys:

- F4** Exits the contact. If any information about the contact has changed, you will be asked if you wish to save the changes.
- F6** Gives help on the various fields.

User Fields

Introduction

This option gives access to all 15 of the user fields. The description for each of the fields is maintained in the Prospect Parameters. The codes allowed for each user field are maintained in Class Code Maintenance.

How to Execute

From the Prospect Maintenance Screen, with a prospect displayed, press **F8**.

Field	Value	Description
Company Type	[REDACTED]	
Hardware Plat	RS6000	IBM RS-6000
Estimated Users	U32	Unk - 32 Users
Source Code	CPA	CPA Software News
\$ Potential	25-50	\$25,000 to \$50,000
Field 5		
Field 7		
Field 8		
Field 9		
Field 10		
Field 11		
Field 12		
Field 13		
Field 14		
Field 15		

Description of Fields

User Field x

The actual description of these fields will be replaced with the descriptions entered in the Prospect Parameters. Enter a valid class code for each of the user fields you will be using for this prospect. The descriptions of each class code will be displayed automatically.

Press **F2** to display a list of the valid class codes for each user field.

Press **F3** to add new class codes for this User Defined Field.

Exit the Screen

When you are finished, press **F4** and you will be returned to the main Prospect Maintenance screen, with the prospect's information still displayed.

Prospect Masterfile Listing

Introduction

The Prospect Masterfile Listing shows this prospect's information, including name, address, phone numbers, user fields, tasks and call notes.

How to Execute

From the Prospect Maintenance Screen, with a prospect displayed, press **F9** to print or display the report.

Exit Report

When the report is finished, you will be returned automatically to the Prospect Maintenance Screen.

Prospect Parameters

Introduction

The parameters allow you to customize the Prospect Management System to meet the specific needs of your company. Here is where you will indicate the "days to add" when computing the next call date, as well as provide descriptions for the 15 user fields.

How to Execute

From the Prospect Management System Menu, select **Prospect Parameters**.

Description of Fields

Number of days to add when calculating the next call date

The number entered here will be added to today's date to calculate the next call date. The next call date can always be overridden.

User Field x Desc

Enter up to 14 characters, followed by a ":" (colon) to describe as many of the User Fields as you need. If you are using graphical screens, you may want to eliminate the colon.

Exit the Screen

When you are finished, press **F4** and you will be returned to the Prospect Management System Menu.

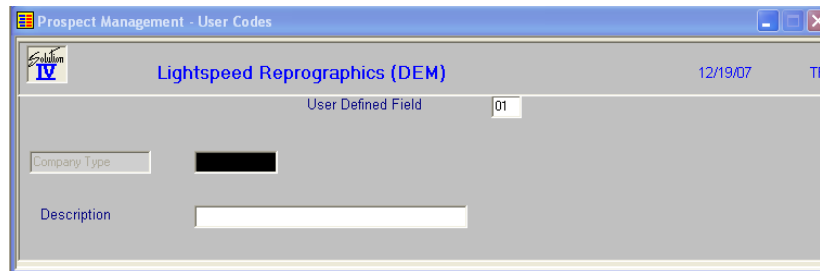
User Class Code Maintenance

Introduction

User Class Codes are the specific codes used within each of the various User Fields set up in Parameter Maintenance. At least one class code needs to be defined for each User Defined Field that you will be using.

How to Execute

From the Prospect Management System Menu, select **User Class Code Maintenance**.



Description of Fields

You will receive the following prompt:

Enter the User Field you wish to maintain

Enter the appropriate number to maintain.

Example: 01

User Field x (replaced with actual field description)

Enter up to ten alphanumeric characters representing a valid code within this User Defined Field.

Examples: A

B

CPA

0000000500

Description

Enter up to 35 alphanumeric characters for the description of the code entered.

Examples: A Agricultural

B Bakery

CPA CPA Software News Ad

0000000500\$0 to \$500 Potential

Exit the Screen

When you are finished entering class codes for a particular User Defined Field, press **F4** from the class code and you will be returned to the "Enter the User Field to Maintain" prompt.

When you are finished entering all class codes, press **F4** from the message and you will be returned automatically to the Prospect Management System Menu.

User Class Code Listing

Introduction

The User Class Code Listing is a report showing all of the class codes defined for each of the User Defined Fields you will be using.

How to Execute

From the Prospect Management System Main Menu, select **User Class Code Listing**. You will see a report similar to the one on the following page.

Exit the Screen

When the report is finished, you will be returned automatically to the Prospect Management System Menu.