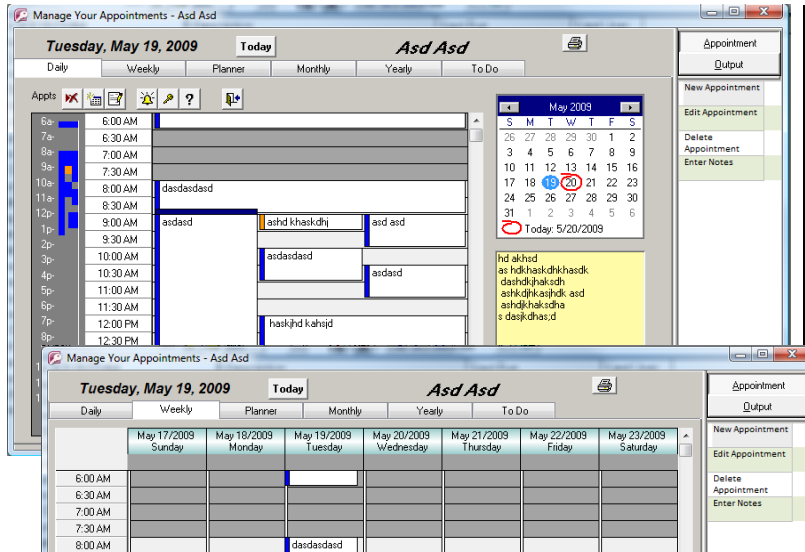


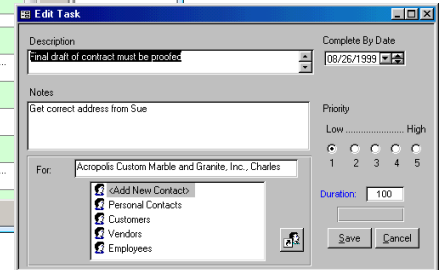
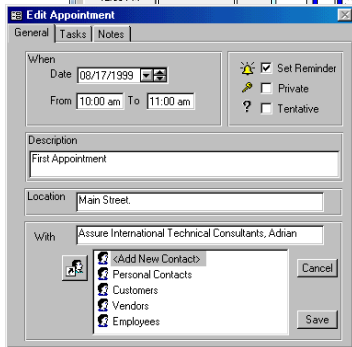


## UA Contact Management Module

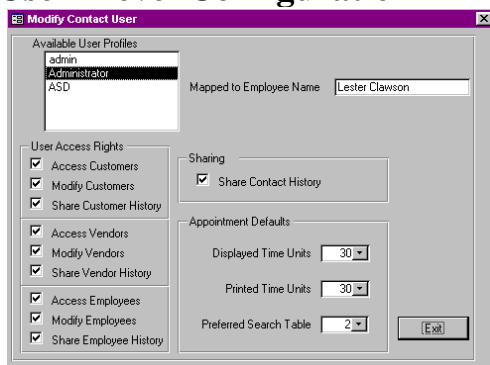
### Appointments / Calendar



- Add appointments to the scheduler in three ways. By selecting a time and then start typing, highlight a time and then click on the Add Appointment Icon, highlight a time and right mouse click, which will bring up the Edit Appointment window
- Appointment duration and starting times can be changed using the mouse or the Edit Appointment window.
- Drag and drop, stretch appointments
- Views: Daily, weekly, monthly, Yearly
- Track and escalate tasks/ issues based on priority and due date.



### User Level Configuration



The system administrator can assign a relationship between the UA70 security file and employee records from the Payroll Module. The administrator can then assign User Access Rights to the Customer, Vendor and Employee tables. Selecting 'Share History' will enable this user to see history record created by other users. Anyone who has a mapping defined will gain access to Personal Contacts as a minimum default.



## Contact Management

Contact Management provides the user the tool to manage Contact history for Customers, Vendors, Employees and Personal Contacts. The operator can see any or all of these tables based on the rights granted by the Administrator.

Add tasks notes follow up and actions to all authorized contacts types. Filter by entity filters defined by users or corporate. Including cycle accounts by date of last contact.

Duration	Count
Last 30 Days	123
30-60 Days	45
60-90 Days	33
90-120 Days	21
> 120 Days	12
Never	5

## Activity Objects

You can define one or more OLE objects that can be used as default documents when creating history records. Examples might be Fax cover letters or default proposals. These objects can be stored with the history for later review or printing

➔ After selecting an object, you will be returned to the Activity Description screen and the object will be active but minimized. Moving off the object and then double clicking on the object will cause the object to become active and full sized