

Esprit

Delivering Competitive Edge

Client Service Bulletin

ESPRIT Telesales Module



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ESPRIT Telesales Module

Overview

This document is a functional User Guide for the Esprit Telesales module, detailing the set-up and the operational use of the software.

The Esprit Telesales feature was initially released as part of Release 6.0 and documented in the Esprit Release 6.0 document issued in 1998.

The Telesales functionality is significantly changed in Release 7.1 and this document supersedes and replaces all previous documentation.

Purpose

The purpose of the Esprit Telesales feature is to allow the Esprit User to focus on customers who repeatedly purchase the same goods in order to maximise their sales potential. It also offers the opportunity to tie in telesales activity with regular delivery rounds.

This Client Service Bulletin describes:

- How to configure the software
- How the software functions
- How it may be used

Some aspects of the functionality are potentially complex and it is therefore vital that the software's capabilities and limitations are fully understood before it is deployed live.

Initialisation and Set-up

File Changes

Esprit Telesales file structures have changed and existing files will be removed by the Esprit Release 7.1 Installer.

Files that will be removed are:

F6SL27nn	Telesales Contact Details
F6SL28nn	Telesales Call/Delivery List File
F6SL34nn	Telesales PLOF file

To Turn on Telesales

Product Option **8PB319** needs enabling for the Telesales functionality.

Turn on Last Price Paid

If you do not already use the Last Price Paid facility within the Negotiation Panel, it will be necessary for you to build the Last Price Paid History file.

Firstly, Customers that will be active in the Telesales environment must have the Last Price Paid field flagged as [Y]. You can set this flag using the Customer Maintenance routine (**BCT8PB52**). This field can also be bulk changed using the Customer Bulk Changes routine (**BCT8PB47**).

Run the file initialisation routine (**BCT8PBJ6**), Screen Display Page 3, option 3, Last Price Paid Creation to build the Last Price Paid History file.

Turn on Telesales Users

The Telesales feature must be activated for members of staff who are authorised to use the Telesales functionality. This is controlled at the Esprit User level.

Run User Name Maintenance (**BCT6OF14**), and adjust the following fields:

- TS User:** Enter Y if the user is to use Telesales.
- TS Staff:** Enter the Staff number of the user - this will be automatically assigned to any order raised.
- TS Pop Ups:** Set to Y to allow the user access to Telesales Pop-Up memos.

Table File Entries

Add a table file in Table File Maintenance (**BCT6OF15**) of TLIS - Telesales List, with a definition of Number and code size of 4.

Add a table type of TDEL - Delivery List, with a definition of Number and a code Size of 4.

Add a Table file of TREP - Telesales Representatives, with a definition of Number and code side of 4.

Add a Table file of TSPC - Telesales Special Offers, with a definition of Number and code side of 4.

Menu Entries

Add the following programs at an appropriate point in your menu structures.

```

+-----+-----+-----+-----+
| 1 Universal Trading ||Main Menu||Date:27-Oct-03||Time:15:10:14||111 |
+-----+-----+-----+-----+
+-----Main Menu F1--+
| 1 Pr+-----Sales Ledger System F2--+
| 2 Sa| 1 Fi+-----Telesales F3--+
| 3 Pu| 2 Po| 1 Customer Maintenance
| 4 No| 3 Re| 2 Bulk Auto Load PLOF
| 5 Sy| 4 En| 3 Generate Special Offer PLOFs
| 6 BC| 5 Pe| 4 Call List Maintenance
| 7 Da| 6 Op| 5 Delivery List Maintenance
| 8 To| 7 Te| 6 Calls Analysis Report
| 9 Qu|      | 7 Telesales Pop Ups
+-----+-----+-----+-----+
          +-----+-----+-----+-----+
          |                                     [ ]
          +-----+-----+-----+-----+

```

```

+-----+-----+-----+-----+
| 1 Universal Trading ||Main Menu||Date:27-Oct-03||Time:15:10:14||111 |
+-----+-----+-----+-----+
+-----Main Menu F1--+
| 1 Pr+-----Sales Ledger System F2--+
| 2 Sa| 1 Fi+-----Telesales F3--+
| 3 Pu| 2 Po| 1 BCT6SL83          +-----+
| 4 No| 3 Re| 2 BCT6SL84          |Menu:6SL/83|
| 5 Sy| 4 En| 3 BCT6SL86          +-----+
| 6 BC| 5 Pe| 4 BCT6SL88
| 7 Da| 6 Op| 5 BCT6SL88  DEL
| 8 To| 7 Te| 6 BCT8PB1J
| 9 Qu|      | 7 BCT6OF11  6TS
+-----+-----+-----+-----+
          +-----+-----+-----+-----+
          |                                     [ ]
          +-----+-----+-----+-----+

```

Maintenance

Telesales Lists

You will need to add a table file entry for every Telesales list that you wish to use. A Telesales list groups together customers you wish to call at the same time.

For example the criteria for the grouping could be one or more of:

- Customers who have been assigned to the same Telesales staff member.
- Customers in the same geographical area.
- Customers on the same delivery route.
- Customers with the same delivery day.
- Customers with particular product requirements.
- New / Existing Customers.

In the simplified example shown below, Universal Trading have organised their call lists to reflect their 3 main delivery routes; South West, North and East, and they will deliver 5 days on the South West route, 3 days North and two days East.

There is also a list for customers Universal Trading would like to call, with details of the Winter Special Offer.

01 Universal Trading Table File Maintenance 27/10/03 10:41:56 15			
TLIS Code	Telesales Lists Description 1	[Number] Low [] High []	Description 2
1	1010		South West - Monday
2	1020		South West - Tuesday
3	1030		South West - Wednesday
4	1040		South West - Thursday
5	1050		South West - Friday
6	2010		North - Monday
7	2030		North - Wednesday
8	2050		North - Friday
9	3020		East - Tuesday
10	3040		East - Thursday
11	9010		Timber
12	9020		Gardening Supplies
13	9900		Winter Special Offer

Next Previous Add Modify Delete List End [_]

Important Note:

A customer may appear more than once on a Telesales list.

A customer may appear on more than one Telesales list.

Example:

Universal Tradings customer, Western Plumbing Services (WP/100), has two buyers one for central heating equipment and one for bathroom fixtures and fittings. Delivery can be on Tuesday or Thursday for central heating but only on Tuesday for bathroom.

Therefore, Western Plumbing Services appears twice on list 1010 (for the Tuesday Deliveries) and only once on list 1030 (for Thursday delivery).

Call List 1010 South West – Monday

Seq	Account	Name	Contact	Delivery
10	WP/0000100	Western Plumbing Services	Central Heating	Tuesday
20	WP/0000100	Western Plumbing Services	Bathroom	Tuesday

Call List 1030 South West – Wednesday

Seq	Account	Name	Contact	Delivery
10	WP/0000100	Western Plumbing Services	Central Heating	Thursday
20	WP/0000100	Western Plumbing Services	Bathroom	Tuesday

Delivery Lists

You will need to add a table file entry for every delivery list that you will wish to use.

A Delivery list groups together potential orders in a fixed sequence.

For example the criteria for the grouping could be one or more of:

- Delivery for the same area
- Delivery for the same route
- Delivery by product type
- Delivery by day of the week

01 Universal Trading Table File Maintenance 27/10/03 12:58:27 15			
TDEL	Telesales Delivery List	[Number] Low [] High []	
Code	Description 1	Description 2	

1	1000	South West	
2	2000	North	
3	3000	East	
4	9000	Gardening Supplies South West	
5	9010	Gardening Supplies North & East	
6	9020	Timber South West	
7	9030	Timber North & East	

	Next	Previous	Add Modify Delete List End [_]

In the simplified example shown above, Universal Trading have 3 main delivery routes; South West, North and East, and specialist delivery routes for Gardening Supplies and for Timber.

Important Note:

- A customer may appear more than once on a Delivery List.
- A customer may appear on more than one Delivery List.

Example:

From our Telesales list example Western Plumbing Services will have 3 entries on list 1000 – South West. If Western Plumbing Supplies also buy Timber from Universal Trading they will have an entry on list 9020 - Timber South West.

Delivery List 1000 South West

Seq	Account	Name	Contact	Delivery
120	WP/0000100	Western Plumbing Services	Central Heating	Tuesday
120	WP/0000100	Western Plumbing Services	Bathroom	Tuesday
120	WP/0000100	Western Plumbing Services	Bathroom	Thursday

Telesales Representatives

Add an entry to the Telesales Representatives table for each Telesales Operator/Representative you wish to assign to a customer site.

```
01 Universal Trading Table File Maintenance 27/10/03 14:23:08 15
TREP Telesales Representatives [Number] Low [ ] High [ ]
Code Description 1 Description 2
-----
1 0001 Mr Pink
2 0002 Mr White
3 0003 Mr Brown
4 0004 Mr Orange
5 0005 Mr Blue
-----
Next Previous Add Modify Delete List End [_]
```

Customer Maintenance

For every customer that you wish to include in a Telesales list it will be necessary to set the field Telesales in Customer Maintenance (BCT6SL02/ADD or MOD) to Y. When you do this, a further screen will appear in Customer Maintenance.

```

01 Universal Trading Customer Telesales Maintenance 27/10/03 14:34:22 83

Branch [ 30]

Short Name          WPS
Account Number     WP/0000100      Western Plumbing Services

In House Sales Contact [ 0]

Customer Contacts

      Name                               Title           Phone No.
1 [                               ][] +-----Telesales Representatives--+
2 [                               ][] | 1   1 Mr Pink                               |
3 [                               ][] | 2   2 Mr White                               |
4 [                               ][] | 3   3 Mr Brown                               |
Note 1 [                               ][] | 4   4 Mr Orange                               |
2 [                               ][] | 5   5 Mr Blue                               |
3 [                               ][] |                               |
4 [                               ][] |                               |
5 [                               ][] |                               |
6 [                               ][] |                               |
                               | F2=Next F3=Previous F4=Start _ |
                               +-----+
  
```

Select the 'In House Sales Contact' from the 'Telesales Representatives' list entered earlier and fill in the contacts and notes fields as appropriate (see overleaf).

```
01 Universal Trading Customer Telesales Maintenance 27/10/03 14:34:22 83

Branch [ 30]

Short Name      WPS
Account Number  WP/0000100      Western Plumbing Services

In House Sales Contact [__1] Mr Pink

Customer Contacts

      Name                      Title                      Phone No.
1 [Simon Smith          ] [Director                ] [01925 732 300]
2 [David Barker         ] [Purchasing Manager     ] [01925 732 300]
3 [Sally Cartwright    ] [Purchasing Assistant  ] [01925 732 300]
4 [Peter Parker        ] [Timber Purchasing      ] [01925 732 300]

Note 1 [Peter will only place orders on a Monday          ]
      2 [Any orders over £1000 needs approval from Simon  ]
      3 [                                                  ]
      4 [                                                  ]
      5 [                                                  ]
      6 [                                                  ]
```

Repeat this for each Customer to be included in your Telesales activity.

Telesales Maintenance

```

01 Universal Trading Customer Telesales Maintenance 27/10/03 14:34:22 83

Branch [ 30]

Short Name           WPS
Account Number      WP/0000100      Western Plumbing Services
Not Customer's Home Branch      Winding River Ranch
Site/Contract              South West Dakota
                               Nr Stockport

Customer Reference   :0161 234 678
Contact/Call Back   :0161 235 679

Special Instructions 1:
Special Instructions 2:

Selling Representative:10

Contact & Notes      PLOF Detail      List details or End [_]

```

Contact & Notes

This option enables modification of the contact details entered when the customer was added (or modified to enable Telesales).

After selecting the **Contact & Notes** option and reviewing contact details the display retains the contact details and the options line is presented.

```

Short Name           WPS
Account Number      WP/0000100      Western Plumbing Services

In House Sales Contact [__1] Mr Pink

Customer Contacts

Name                Title                Phone No.
1 [Simon Smith      ] [Director           ] [01925 732 300]
2 [David Barker     ] [Purchasing Manager ] [01925 732 300]
3 [Sally Cartwright ] [Purchasing Assistant] [01925 732 300]
4 [Peter Parker     ] [Timber Purchasing  ] [01925 732 300]

Note 1 [Peter will only place orders on a Monday ]
2 [Any orders over £1000 needs approval from Simon ]
3 [ ]
4 [ ]
5 [ ]
6 [ ]

Contact & Notes      PLOF detail      List details or End [_]

```

Note: At this point selecting the PLOF detail option displays a warning as no lists have been created for this customer.

List Details

Selecting List Details allows the creation of the initial list details for this customer.

```
01 Universal Trading Customer Telesales Maintenance 27/10/03 15:57:37 83

Branch [ 30]

Short Name          WPS
Account Number      WP/0000100      Western Plumbing Services

In House Sales Contact [ 1] Mr Pink
Telesales List      [   ]
Sequence Number     [   ]

Delivery List       [   ] |1 1010 South West - Monday
Sequence Number    [   ] |2 1020 South West - Tuesday
                   [   ] |3 1030 South West - Wednesday
Delivery Day       [   ] |4 1040 South West - Thursday
Contact Notes      [   ] |5 1050 South West - Friday
                   [   ] |6 2010 North - Monday
                   [   ] |7 2030 North - Wednesday
                   [   ] |8 2050 North - Friday
                   [   ] |9 3020 East - Tuesday
                   [   ] | F2=Next F3=Previous F4=Start _
                   [   ] +-----Telesales Lists-----+
```

Telesales List

F15 from the Telesales List prompt will allow selection from the Telesales List table file entries created earlier.

Sequence Number

The sequence number indicates the position in the Telesales list for this entry. The Telesales List sequence number must be unique.

Delivery List

F15 from the Delivery List prompt will allow selection from the Delivery List table file entries created earlier.

```

01 Universal Trading Customer Telesales Maintenance 27/10/03 15:57:37 83

Branch [ 30]

Short Name          WPS
Account Number     WP/0000100      Western Plumbing Services

In House Sales Contact [ 1] Mr Pink
Telesales List      [1010] South West - Monday
Sequence Number     [ 10]

+-----Telesales Delivery List--+
Delivery List      [  ] | 1 1000 South West |
Sequence Number    [  ] | 2 2000 North   |
                   | 3 3000 East     |
Delivery Day       [  ] | 4 9000 Gardening Supplies South West |
Contact Notes     [  ] | 5 9010 Gardening Supplies North &East |
                   | 6 9020 Timber South West |
                   | 7 9030 Timber North & East |
                   |
                   | F2=Next F3=Previous F4=Start _ |
+-----+

```

Sequence Number

The sequence number indicates the position in the Delivery list for this entry. The Delivery List sequence number need not be unique. You may decide to use Delivery List Sequence number to indicate a particular geographical location where more than one of your customers requires delivery.

```

Account Number     WP/0000100      Western Plumbing Services

In House Sales Contact [ 1] Mr Pink
Telesales List      [1010] South West - Monday
Sequence Number     [ 10]

Delivery List      [1000] South West
Sequence Number    [ 120]

Delivery Day       [3] Tuesday
Contact Notes     [Central Heating ]

+-----+
| Accept? [Y]_ |
+-----+

```


Delivery Day

The Delivery Day is the users preference with 1 indicating Sunday, 2=Monday and so on.

Contact Notes

The Contact Notes allow the entry of 20 characters of notes, which relate to this specific Telesales list entry.

```
01 Universal Trading Customer Telesales Maintenance 27/10/03 15:57:38 83

Branch [ 30]

Short Name          WPS
Account Number     WP/0000100      Western Plumbing Services

In House Sales Contact [ 1] Mr Pink
Telesales List      [1010] South West - Monday
Sequence Number     [ 10]

Delivery List       [1000] South West
Sequence Number     [ 120]

Delivery Day        [3]    Tuesday
Contact Notes       [Central Heating  ]

Contact & Notes  PLOF details  List details or End [ _]
```

After completing the **List details** screen the display retains the **List details** and the options line will now allow selection of the **PLOF details** option.

Please note that whilst it is possible to use the **List details** screen to change the customer's call list entries, it is recommended that the call and delivery list maintenance routines are used (detailed on pages 24-27).

Price List Order Form (PLOF)

The PLOF is the list of products that you want to offer your customer when you call.

```

01 Universal Trading Customer Telesales Maintenance 27/10/03 15:57:38 83

Branch [ 30]

Short Name          WPS
Account Number     WP/0000100      Western Plumbing Services

Update or Replace           [R]
Copy existing, Manual entry or Auto Load [A]
Insert at Start or End     [S]
PLOF number for this account [ 1]
How many orders to Auto Load from ?     [ 0]

```

Update or Replace

Replace will build a new list of products.
Update will add new products to the existing list.

Copy existing, Manual entry or Auto Load

Auto Load will take products from recent orders and add them to the list.
Manual Entry allows the manual addition of products not previously bought by this customer. Manual entry also allows the removal of items from the PLOF.

Insert at Start or End

This prompt controls the position for automatic addition (Update & Auto Load) of new items to the list.

PLOF number for this account

The PLOF number for this account should always be left as 1. The Customer Telesales Maintenance routine will allow entry of different PLOF numbers and create the appropriate records but the rest of the Telesales application will only allow you to select 1. Multiple PLOF functionality may be introduced in a later release of Esprit if it is decided that this feature is of significant benefit.

How many orders to Auto Load from ?

If the PLOF is being automatically updated from recent sales orders (Auto Load) this prompt controls the number of previous orders the program will check for unique products.

Example: PLOF Creation

As we have just set up Western Plumbing Services for Telesales operation we will start by creating the initial PLOF.

The customer's last sales order is shown below and for simplicity we will build the initial PLOF based on just this order.

01 Universal Trading	Enter Sales Order	28/10/03	11:43:51	12
Branch No. [30]		Margin	2202.57	
Account No. WP/0000100	Western Plumbing Services	Total	8337.87	
Order 1004935		%	26.42	
LN-LN-Product Code-Description-----	Quantity---	Price----	Amount	
1 100 113025e Per Each 12% CD and 10% DM	10.000	407.70	4077.00	
		Each		
2 110 113025 Timber with 10% SP and 12% CD	48.000	407.70	183.87	
	mtr	m3		
3 120 113025s Sheet with 12% CD and 10% DM	10.000	407.70	4077.00	
	sheet	sheet		
---Product Code--Description- ASH = OFF --Quantity--Price--Reg.--Disc1-V				
Disc2 Disc3				
(A)ccept,(C)ontinue,(D)elete,(P)ark,(N)ext,(B)ackwards,(H)ead or line no. [_]				

Stage 1 - Auto Load PLOF

Select R(eplace) , A(uto Load) & 1 (Order to autoload from) the system will build a PLOF as shown below.

```
01 Universal Trading Customer Telesales Maintenance 28/10/03 14:33:18 83

Branch [ 30]

Short Name      WPS
Account Number  WP/0000100      Western Plumbing Services

Seq Product  Mode & Description          Qty  Price Per  Date
-----
10 113025e  A Per Each 12% CD and 10% DM  10.000 407.70 Each 28/10/03
20 113025  A Timber with 10% SP and 12% CD 48.000 407.70 m3 28/10/03
30 113025s  A Sheet with 12% CD and 10% DM  10.000 407.70 sheet 28/10/03

-----
Next Previous Add Delete End [ _ ]
```

When starting to use Telesales for the first time Bulk Auto Load PLOF (**BCT6SL84**) can be used to create the PLOF for all customers flagged as Telesales users.

```
01 Universal Trading      Bulk Auto Load PLOF      28/10/03 12:24:48 84

+-----+
| Telesales - Bulk Auto Load Facility |
|-----|
| This routine will automatically build the PLOF detail from the |
| last 3 orders for each customer. |
+<Esc>-----+
```

Bulk Auto Load PLOF reads through the customer file and for each customer flagged for Telesales it populates the PLOF records with the products found on the last 3 invoiced orders.

Stage 2 - Add Manual Lines to PLOF

The customer has shown an interest in AAAA batteries so we have used the M(annual) option to add sequence 15 as shown below.

01 Universal Trading Customer Telesales Maintenance 28/10/03 14:33:18 83							
Branch [30]							
Short Name		WPS					
Account Number		WP/0000100		Western Plumbing Services			
Seq	Product	Mode & Description	Qty	Price	Per	Date	

10	113025e	A Per Each 12% CD and 10% DM	10.000	407.70	Each	28/10/03	
15	AAAA	M BATTERIES	0	0.00		0/00/00	
20	113025	A Timber with 10% SP and 12% CD	48.000	407.70	m3	28/10/03	
30	113025s	A Sheet with 12% CD and 10% DM	10.000	407.70	sheet	28/10/03	

Stage 3 – Add Special Lines to PLOF

Universal Trading have bought a job lot of festive goodies, which they wish to encourage all of their customers to buy. Telesales allows the addition of special items to all existing PLOFs.

Firstly, add an entry to the Telesales Specials Table (TSPC) we created earlier. The product code is placed in Description 1 and relevant comments in Description 2.

```
01 Universal Trading   Table File Maintenance   28/10/03   12:55:17   15
TSPC Telesales Special Offers   [Number] Low [   ] High [   ]
Code Description 1             Description 2
-----
1 0010 FESTIVE-001             Fridge Magnets
-----
```

Next we run Generate Special Offers (**BCT6SL86**), which adds FESTIVE-001 to all PLOFs.

```
01 Universal Trading   Generate Special Offers   29/10/03   15:42:40   86
+-----+
|This routine will re-build all PLOF's to include |
|any special offers.                             |
+<Esc>-----+
```

Note that the special offer has been placed at the start of the PLOF and the PLOF has been re-sequenced.

```
01 Universal Trading   Customer Telesales Maintenance 28/10/03 14:58:18 83
Branch [ 30]
Short Name           WPS
Account Number       WP/0000100      Western Plumbing Services
Seq Product  Mode & Description             Qty  Price Per  Date
-----
10 FESTIVE-001 S Santa Clause Fridge Magnets    0    0.00      0/00/00
20 113025e A Per Each 12% CD and 10% DM    10.000 407.70 Each 28/10/03
30 AAAA M BATTERIES                    0    0.00      0/00/00
40 113025 A Timber with 10% SP and 12% CD  48.000 407.70 m3  28/10/03
50 113025s A Sheet with 12% CD and 10% DM    10.000 407.70 sheet 28/10/03
-----
Next Previous Add Delete End [ _ ]
```

Stage 4 - Telesales Order Update

The final action relating to PLOF maintenance is to run Telesales Order Update (**BCT6SL94**).

```
01 Universal Trading   Telesales Order Update   28/10/03   13:26:33   94

+-----+
|Telesales - Order Update Facility|
|-----|
|This routine will automatically update the PLOF records from the|
|last 3 orders for each customer.  |
+<Esc>-----+
```

Telesales Order Update reads the last 3 invoiced orders for each customer and populates the PLOF records with the quantity and price of each product purchased, but only for products which already exist on the PLOF. This data is presented back to the Telesales operator when raising a Telesales order, an example is shown later in this CSB.

Call List Maintenance (BCT6SL88)

The Telesales call list maintenance (**BCT6SL88**) initially asks for a List Number, F15 will allow selection from the Telesales Lists table file.

```
01 Universal Trading      Call List Maintenance      28/10/03  15:11:01  88

List Number [  0]
Seq Account Number & Name                                Contact Notes
-----
                                                    +-----Telesales Lists-----+
| 1 1010 South West - Monday                               |
| 2 1020 South West - Tuesday                             |
| 3 1030 South West - Wednesday                           |
| 4 1040 South West - Thursday                             |
| 5 1050 South West - Friday                               |
| 6 2010 North - Monday                                   |
| 7 2030 North - Wednesday                               |
| 8 2050 North - Friday                                   |
| 9 3020 East - Tuesday                                   |
| F2=Next F3=Previous F4=Start _                         |
+-----+
-----
```

List 1010, shown below, already contains an entry, which was created when the Telesales details were added for Western Plumbing Services.

```
01 Universal Trading      Call List Maintenance      28/10/03  15:11:01  88

List Number [1010] South West - Monday
Seq Account Number & Name                                Contact Notes
-----
1   10 WP/0000100      Western Plumbing Services      Central Heating

-----
Toggle (Delivery) Next Previous List Add Modify Delete End [_]
```

The A(dd) option presents the data entry window shown below.

```

01 Universal Trading   Call List Maintenance   28/10/03  15:11:01  88
List Number [1010] South West - Monday
Seq Account Number & Name                                     Delivery Day
-----
1   10 WP/0000100      Western Plumbing Services   Tuesday
+-----+
|Call Seq      [ 20]
|Account       [WP/0000100/   ]   Western Plumbing Services
|Contact Notes [Bathroom     ]
|PLOF         [ 1]
|Delivery List [1000]           South West
|Delivery Seq  [ 100]
|Delivery Day  [3]             Tuesday
+-----+
+-----+
|Accept? [Y]|
+-----+
    
```

As an example I have added two entries for Western Plumbing Services and an entry for a different customer.

```

01 Universal Trading   Call List Maintenance   28/10/03  15:11:01  88
List Number [1010] South West - Monday
Seq Account Number & Name                                     Contact Notes
-----
1   10 WP/0000100      Western Plumbing Services   Central Heating
2   20 WP/0000100      Western Plumbing Services   Bathroom
3   30 AR/0000001      Andy Reeve Telesales        ** Priority Service
-----
Toggle (Delivery)  Next  Previous  List  Add  Modify  Delete  End [_]
    
```

Selecting T(oggle) from the options line displays the Delivery Day in place of the Contact Note.

```

01 Universal Trading   Call List Maintenance   28/10/03  15:11:01  88
List Number [1010] South West - Monday
Seq Account Number & Name                                     Delivery Day
-----
1   10 WP/0000100      Western Plumbing Services   Tuesday
2   20 WP/0000100      Western Plumbing Services   Tuesday
3   30 AR/0000001      Andy Reeve Telesales        Tuesday
-----
Toggle (Contact)  Next  Previous  List  Add  Modify  Delete  End [_]
    
```

Delivery List Maintenance (BCT6SL88/DEL)

The Telesales call list maintenance (BCT6SL88 with a switch of DEL) initially asks for a Delivery List Number, F15 will allow selection from the Telesales Delivery Lists table file.

```

01 Universal Trading Delivery List Maintenance 28/10/03 15:26:47 88

List Number [ 0]
Seq Account Number & Name                               Delivery Day
-----
+-----Telesales Delivery List-----+
| 1 1000 South West                                     |
| 2 2000 North                                         |
| 3 3000 East                                           |
| 4 9000 Gardening Supplies South West                 |
| 5 9010 Gardening Supplies North &East               |
| 6 9020 Timber South West                             |
| 7 9030 Timber North & East                           |
+-----+
| F2=Next F3=Previous F4=Start _                      |
+-----+
    
```

Delivery List records are simply another view of the call list record. In the example below all of the records on the example call list 1010 also appear on the Delivery list 1000. This is a convention that I have adopted for this example and need not be the case.

```

01 Universal Trading Delivery List Maintenance 28/10/03 15:26:47 88

List Number [1000] South West
Seq Account Number & Name                               Delivery Day
-----
1  20 AR/0000001    Andy Reeve Telesales           Tuesday
2  100 WP/0000100   Western Plumbing Services     Tuesday
3  120 WP/0000100   Western Plumbing Services     Tuesday
-----
Toggle (Contact)  Next Previous List Modify End [_]
    
```

In Delivery List Maintenance mode the program does not offer an A(dd) option as each entry on the list is tied to a call list record. The M(odify) option will only allow delivery information to be modified enabling the fine tuning of the delivery list. In this example we might want to change the delivery sequence for WP/100 to be the same for both entries.

```

01 Universal Trading Delivery List Maintenance 28/10/03 15:26:47 88

List Number [1000] South West
Seq Account Number & Name Delivery Day
-----
1 20 AR/0000001 Andy Reeve Telesales Tuesday
2 100 +-----+
3 120 |Call Seq [ 10]
|Account [WP/0000100/ ] Western Plumbing Services
|Contact Notes [Central Heating ]
|PLOF [ 1]
|Delivery List [1000] South West
|Delivery Seq [ 120]
|Delivery Day [3] Tuesday
+-----+

-----
2 100 WP/0000100 Western Plumbing Services Tuesday +-----+
|Accept? [Y]|
+-----+

```

We have now completed the installation and set-up phase, and are ready to sell!

Sales Order Entry

Pressing F12 from the Short Name or Account Number prompt allows selection of the Telesales Call List to be processed, F15 from the List No prompt allows table file selection.

```
01 Universal Trading      Enter Sales Order      28/10/03 15:38:16 E1
Quotes Window Off
Branch No.   [ 30]                               List No [  0]
Short Name
Account Number      /

+-----Telesales Lists-----+
| 1 1010 South West - Monday                    |
| 2 1020 South West - Tuesday                   |
| 3 1030 South West - Wednesday                |
| 4 1040 South West - Thursday                 |
| 5 1050 South West - Friday                   |
| 6 2010 North - Monday                       |
| 7 2030 North - Wednesday                    |
| 8 2050 North - Friday                       |
| 9 3020 East - Tuesday                       |
| F2=Next F3=Previous F4=Start _             |
+-----+

```

Controlled by the F5 function key the call list presents either All Calls or Calls To Do.

In our example All Calls and Calls To Do is initially the same list as we have not yet processed any calls.

```
01 Universal Trading      Enter Sales Order      28/10/03 15:38:16 E1
Quotes Window Off
Branch No.   [ 30]                               List No [1010]
Short Name
Account Number      /

+-----+
| 10 WP/0000100 Western Plumbing Services      Central Heating      Call |
| 20 WP/0000100 Western Plumbing Services      Bathroom              Call |
| 30 AR/0000001 Andy Reeve Telesales           ** Priority Service   Call |
|
| F2=Next F3=Previous F4=Start F5=All Calls F7=Reset Sequence [__10] |
+-----+

```

Selecting sequence 10 presents the Customer Contacts information.

```

01 Universal Trading   Enter Sales Order   28/10/03 15:38:16 E1
Branch No.   [ 30]
Account No.   WP/0000100 Western Plumbing Services
                WPS                                0161 234 567

<-----Customer Contacts----->
  Name                Title                Phone Information
1 Simon Smith         Director                01925 732 300
2 David Barker        Purchasing Manager      01925 732 300
3 Sally Cartwright    Purchasing Assistant    01925 732 300
4 Peter Parker        Timber Purchasing       01925 732 300

Note 1 Peter will only place orders on a Monday
      2 Any orders over £1000 need approval from Simon
      3
      4
      5
      6

Header details, Cancel, Busy or Order [_]

```

The (H)header option allows modification of the Customer Contacts data as shown below.

```

01 Universal Trading   Enter Sales Order   28/10/03 15:38:16 E1
Branch No.   [ 30]
Account No.   WP/0000100 Western Plumbing Services
                WPS                                0161 234 567

<-----Customer Contacts----->
  Name                Title                Phone Information
1 Simon Smith         Director                01925 732 300
2 David Barker        Purchasing Manager      01925 732 300
3 Sally Cartwright    Purchasing Assistant    01925 732 300
4 Peter Parker        Timber Purchasing       01925 732 300

Note 1 Peter will only place orders on a Monday
      2 Any orders over £1000 need approval from Simon
      3
      4 Peter is away until 10th November - Sally is buying timber
        until then.
      5
      6

Header details, Cancel, Busy or Order [_]

```

If the customer is busy or does not wish to order this time the relevant options will change the call status and return to the call list.

Selecting Order initiates PLOF processing. In the example below the five products we added to the PLOF are displayed together with the ordering history and last price paid. The last 3 order dates are shown as column headings and the quantity ordered on each of those orders is shown. In our example there was only one order and it did not contain the manual line (BATTERIES) or the special (Fridge Magnets). The last price paid column shows the price from the last order.

```
01 Universal Trading      Enter Sales  Order      28/10/03  15:38:16  E1
Branch No.   [ 30]
Account No.  WP/0000100 Western Plumbing Services
                WPS                        0161 234 567
+-----+
|Description          0/00  0/00  28/10          |
|Santa Claus Fridge Magnets          [ _____]    0.00  |
|Per Each 12% CD and 10% DM          10.000 [      ]  407.70 Each |
|BATTERIES                                [      ]    0.00  |
|Timber with 10% SP and 12% CD        48.000 [      ]  407.70 m3  |
|Sheet with 12% CD and 10% DM         10.000 [      ]  407.70 sheet |
|
|F2=Next F3=Prev F4=Lines F5=Abort F6=Order F8=End F15=Stock
|Shift/F15=Enquiry
+-----+
```

Note: Timber quantities are always shown in the issue quantity, usually this will be mtrs.

```

01 Universal Trading      Enter Sales  Order      28/10/03  15:38:16  E1

Branch No.   [ 30]
Account No.  WP/0000100 Western Plumbing Services
              WPS                               0161 234 567

+-----+
|Description          0/00   0/00  28/10          |
|Santa Claus Fridge Magnets          [ _____]   0.00  |
+-----+
|Free Stock:1364.907-Continue? [_]| 10.000 [ 12.000] 407.70 Each |
+-----+
|BATTERIES                                [      ]   0.00  |
|Timber with 10% SP and 12% CD          48.000 [      ] 407.70 m3 |
|Sheet with 12% CD and 10% DM           10.000 [      ] 407.70 sheet|
|
|F2=Next F3=Prev F4=Lines F5=Abort F6=Order F8=End F15=Stock
|Shift/F15=Enquiry
+-----+

```

The cursor is placed on the first quantity entry box.

Function Keys

- F2 & F3** enable navigation of a list which extends beyond a single screen.
- F4** should be used to modify the order lines after the PLOF has been processed
- F5** aborts the current PLOF and returns to the call list
- F6** allows ordering of the current line without specifying a quantity. Standard Esprit line processing will happen when the PLOF is ended. F6 is mandatory for timber lines. The selected line is highlighted.
- F8** will create a sales order for the selected lines and return to the call list
- F15** displays the stock and on-order details for the current product and **F15** from the stock window will call Price Book Enquiries for the product.
- Shift/F15** will call Sales Order Enquiries.

The message shown below is displayed if a quantity is entered against a timber product.

```
01 Universal Trading      Enter Sales Order      28/10/03  15:38:16  E1
Branch No.   [ 30]
Account No.  WP/0000100 Western Plumbing Services
              WPS                               0161 234 567
+-----+
|Description      0/00  0/00  28/10
|Santa Claus Fridge Magnets      [      ]      0.00
|Per Each 12% CD and 10% DM          10.000 [ 12.000] 407.70 Each
|BATTERIES                               [    100]    0.00
|Timber with 10% SP and 12% CD      48.000 [ 100.000] 407.70 m3
|Sheet with 12% CD and 10% DM       10.000 [  10.000] 407.70 sheet
+-----+
|Error: Quantities cannot be entered against timber
|      products (Calc. Methods 81 thru 89) in the PLOF
|Notes: Use F6 to order such products
+<Esc>-----+
```

If the program detects insufficient stock the warning shown below is displayed. Responding Y to continue does not override the normal back order processing rules – if there is insufficient stock and the system stock flag is set to Warning the line will go on back order. This scenario can be overcome in two ways. Firstly if F6 is selected for the line then standard Esprit line processing will allow F14 to force the allocation of the line. Secondly if F6 is not selected it is possible to force the release of the backorder line using Sales Order Amend.

```

01 Universal Trading      Enter Sales Order      28/10/03  15:38:16  E1
Branch No.   [ 30]
Account No.  WP/0000100 Western Plumbing Services
                WPS                                0161 234 567
+-----+
|Description          0/00   0/00  28/10
|Santa Claus Fridge Magnets          [ _____]   0.00
|Per Each 12% CD and 10% DM          10.000 [ 100.000]  407.70 Each
+-----+
|Free Stock:      305-Continue? [_] |          [   100]   0.00
+-----+
|Timber with 10% SP and 12% CD          48.000 [      ]  407.70 m3
|Sheet with 12% CD and 10% DM          10.000 [      ]  407.70 sheet
|F2=Next F3=Prev F4=Lines F5=Abort F6=Order F8=End F15=Stock
|Shift/F15=Enquiry
+-----+

```

After pressing F8 the standard Esprit line processing kicks in for F6 ordered lines – in the example below the timber product from PLOF sequence 40 is being processed.

```

01 Universal Trading      Enter Sales Order      28/10/03  16:09:56  E1
Branch No.   [ 30]
Account No.  WP/0000100 Western Plumbing Services          Total
0.00
                WPS                                0161 234 567
+-----+
|Tallies :   ___/           /           /           /           |
|           /           /           /           /           |
|           /           /           /           /           |
+-----+
-Product Code--Description- ASH = Off -----Quantity---Price---Reg.---Disc1--
113025                                     Disc2 Disc3
113025      Timber with 10% SP and 12% CD    0.000   407.70  0.00+  0.00+
                                                m3      0.00+  1
Amount                                     0.00
Telesales          /Normal line

```

After processing the F6 lines the call list is re-presented, this time with the processed line missing and the sequence defaulted to the next line in the list.

```
01 Universal Trading      Enter Sales Order      28/10/03  15:53:04  E1
Branch No.   [ 30]                               List No [1010]
Short Name
Account No.   /

+-----+
| 20 WP/0000100 Western Plumbing Services   Bathroom          Call
| 30 AR/0000001 Andy Reeve Telesales        ** Priority Service Call
+-----+

F2=Next F3=Previous F4=Start F5=All Calls F7=Reset Sequence [__20]
```

F7 will reset the status of all calls on the list to Call.

Calls Analysis

The Telesales Calls Analysis program (**BCT6SL1J**) provides status information about the processed call lists together with order value for successful calls.

Once the call list has been reviewed this program can be used to reset the call status to Call.

```

01 Universal Trading   Telesales Calls Analysis  28/10/03  15:35:17  1J
From List No         [      ]
To List No           [      ]
Reset Call Status [N]

                                +-----Telesales Lists-----+
| 1 1010 South West - Monday      |
| 2 1020 South West - Tuesday     |
| 3 1030 South West - Wednesday  |
| 4 1040 South West - Thursday   |
| 5 1050 South West - Friday     |
| 6 2010 North - Monday          |
| 7 2030 North - Wednesday      |
| 8 2050 North - Friday         |
| 9 3020 East - Tuesday         |
|   F2=Next  F3=Previous  F4=Start _ |
+-----+

```

The Telesales Calls Analysis can be used as a control mechanism for individual Telesales promotions, the Telesales call list remaining active for a period of time and the Calls Analysis report used to monitor progress.

Telesales Pop Ups

If Telesales Pop Ups have been set to Y for this user running Telesales Pop Up maintenance (**BCT6OF11 with a switch of 6TS**) will enable the entry of memos.

```

01 Universal Trading      Pop Up Maintenance      30/10/03  11:57:21  11

Telesales

---Account Number--&--Name-----
 1 WP/0000100 Western Plumbing Services
 2 WR/0001810 J K +-----Account WP/0000100--+
 3 WR/0001811 J A |Memo Number [ 1] |
 4 WR/0001840 F WR |
 5 WR/0001841 WRIG|Memo Title [New Trading Hours___]|
 6 WR/0001842 WRIG|
 7 WR/0001843 WRIG|From Date [30/10/03]
 8 WY/0001900 MR G|To Date [30/01/04]
 9 YE/0000505 BARR|
10 YO/0001505 YORK|One Shot Only [N]
11 YO/0001508 YORK|
12 YO/0001510 YTC |Created By [andyr ]
13 YO/0001515 G YO|Last Read By [andyr ]
14 YO/0001516 R YO|Access Date [30/10/03]
15 ZU/0002160 DUMM|Access Time [11:56:55]
-----+-----+

```

The memo Pops Up when the Contacts screen is entered in Sales Order Entry.

```

+-----+s Order 30/10/03 11:55:09 E1
|Please Note: Western Plumbing Supplies|
|are open until 8pm during|
|December and January.|
+-----+ing Services 0161 234 567

<-----Customer Contacts----->
  Name Title Phone Information
 1 Simon Smith Director 01925 732 300
 2 David Barker Purchasing Manager 01925 732 300
 3 Sally Cartwright Purchasing Assistant 01925 732 300
 4 Peter Parker Timber Purchasing 01925 732 300

Note 1 Peter will only place orders on a Monday
 2 Any orders over 1000 need approval from Simon
 3
 4 Peter is away until 10th November - Sally is buying timber
  until then.
 5
 6
  Header details, Cancel, Busy or Order [ ]
<Esc> to exit

```

Extra Fields

If the Sales Ledger Product Option 6SL(28) is turned on then additional analysis fields are available for Telesales customers. These fields are for reporting purposes and do not affect the system operation.

```

01 Universal Trading  Customer Telesales Maintenance  30/10/03 12:10:37 83
Branch [ 30]

Short Name           WPS
Account Number      WP/0000100           Western Plumbing Services

In House Sales Contact [ 1] Mr Pink

Customer Contacts
  Name                Title                Phone No.
  1 [Simon Smith      ][Director            ][01925 732 300 ]
  2 [David Barker     ][Purchasing Manager ][01925 732 300 ]
  3 [Sally Cartwright ][Purchasing Assistant][01925 732 300 ]
  4 [Peter Parker     ][Timber Pu+-----+
Note 1 [Peter will only place orders on |Calling Day [2] Moday |
      2 [Any orders over 1000 need appro|Delivery Day [3] Tuesday |
      3 [                          |Half Day [4] Wednesday |
      4 [                          |Frequency [1] |
      4 [Peter is away until 10th Novemb+-----+
  
```

The additional fields can be viewed in Sales Ledger Enquiries and Customer Telesales maintenance.

```

01 Universal Trading  Customer Telesales Maintenance  30/10/03 16:37:51 83
Branch [ 30]

Short Name           WPS
Account Number      WP/0000100           Western Plumbing Services
Not Customer's Home Branch      Winding River Ranch
Site/Contract                          South West Dakota
                                          Nr. Stockport
                                          SWD 1234

Customer Reference   : 0161 234 678
Contact/Call Back   : 0161 234 567

Special Instructions 1 : +-----+
                      2 : |Calling Day [2] Monday |
                      |Delivery Day [3] Tuesday |
Selling Representative : 10 |Half Day [4] Wednesday |
                      |Frequency [1] |
                      +-----+

Days(Off) Contact & Notes PLOF details List details or End [_]
  
```

The D(ays) toggle enables and disables the additional fields display.

Regional Offices

SCOTLAND

Douglas House
Avondale Campus, Pochard Way
Strathclyde Business Park
Lanarkshire
Bellshill, ML4 3HB
Telephone: 01698 842425
Fax: 01698 845166

NORTH

Beauchief Hall
Beauchief
Sheffield S8 7BA
Telephone: 0114 262 1621
Fax: 0114 262 1126

SOUTH MIDLANDS

Sunrise Parkway
Linford Wood
Milton Keynes MK14 6LJ
Telephone: 01908 665522
Fax: 01908 249798

BML (OFFICE COMPUTERS) LIMITED

Maypole House
Maypole Road
East Grinstead
West Sussex
RH19 1HU
Telephone: 01342 313141
Fax: 01342 313181
www.edp.fastfreenet.com

The Barns
Stretton Road
Stretton
Warrington
Cheshire WA4 4NP
Telephone: 01925 732300
Fax: 01925 730828

DISYS ASSOCIATES LIMITED

Sunrise Parkway
Linford Wood
Milton Keynes
MK14 6LJ
Telephone: 01908 665522
Fax: 01908 249798
www.disys.uk.com

The Barns
Stretton Road
Stretton
Warrington
Cheshire WA4 4NP
Telephone: 01925 732300
Fax: 01925 730828

BCT SOFTWARE SOLUTIONS LIMITED

The Barns, Stretton Road
Stretton, Warrington
Cheshire WA4 4NP
Telephone: 01925 732300
Fax: 01925 730828
www.bct-solutions.co.uk

Douglas House
Avondale Campus, Pochard Way
Strathclyde Business Park
Bellshill, Lanarkshire, ML4 3HB
Telephone: 01698 842425
Fax: 01698 845166

BCT

GROUP HEADQUARTERS (RESEARCH & DEVELOPMENT CAMPUS)

Beauchief Hall, Beauchief, Sheffield S8 7BA
Telephone: 0114 262 1621 Fax: 0114 262 1126
Website: www.edp.fastfreenet.com