COMPANY PROFILE

BIOflex®, Inc. was incorporated in October 1986 and is owned by Charles and Ted Zablotsky. They have developed a vast database of the scientific literature on the subject and have become recognized as pioneers of modern magnetic field therapy.

SOLUTION PROFILE

MAIN.FP3 is the main file to launch and begin using the system.

CONTACTS.FP3 contains information pertaining to company contacts, including main address, phone numbers, customer type, customer industry, referral, credit type, and notes.

PEOPLE.FP3 contains information about individual contacts within a company. This file stores specific mailing and shipping address information, phone numbers (including fax, car, and pager), e-mail address, and card recipient status. There is also a view of other associates working within the same company.

CATALOG.FP3 holds all product information, including item codes, names, descriptions, pictures, and prices for each point on the pricing scale.

BIDINVS.FP3, BILINES.FP3, BINUMS.FP3 are the bid and invoice generating module.

> BIDINVS.FP3 tracks all information pertaining to bids and later invoices, allowing a bid to be converted into an order and invoiced. Shipping, payment, and dated information are stored here.
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> BILINES.FP3 holds each line item for a bid or invoice.
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> BINUMS.FP3 holds numbering information used to identify bids and invoices.

ACTIVITY.FP3, SCHEDULE.FP3, CORRS.FP3, TMPLATES.FP3 files comprise the new lead follow-up and scheduling module.

> ACTIVITY.FP3 holds any follow-up activities associated with an

individual client, including appointments.

SCHEDULE.FP3 provides a calendar interface for checking on appointments and follow-up activities.

CORRS.FP3 maintains information used to create and send correspondences to contacts.

TMPLATES.FP3 holds generic correspondences that are saved as Templates for future correspondence.

The most significant new feature from a usage perspective in this build is the Lead Tracking/Follow-Up system. Although contacts are organized around companies, individual company people can be identified as a “Lead” or as an “Existing Customer”.

LATEST BUILD REVIEW

A new button has been added to the blue bar at the top of the Company People detail view labeled Follow-Ups. Clicking on this button takes the user to another view of the contact person’s information. This view holds all contact activities. Name, Company, and customer status are included on this screen, as well as an expanded view of Notes. The middle panel contains a list of Follow-Up, or “to-do” activities related to this individual. To record a new activity, click in the Date field in this list in the first available space. Enter a date, select an activity type, and type an activity description. A time can also be entered if the activity is a meeting. Activity types include Call, Mail, Fax, E-Mail, and Meet. This list can be edited, but all appointments must be labeled “Meet” to work with the calendar-scheduling interface.

When an activity has been completed, click in the Check Mark column of that activity. To delete an activity, click on that activity and then click the Delete Activity button in this panel.

To access the calendar-scheduling module, click on the Activities button in the Menu Bar on the left. The Activities Schedule opens to today’s date. Clicking on a day in the monthly calendar can change the date viewed. Clicking the arrows on either side of today’s date goes to the previous or next day respectively and the arrows beside the month above the calendar move to the previous and next month.

Appointments are listed in the first panel. To create a new appointment, click in the first available Time column and enter the appropriate information. In a future build, a mechanism for choosing the individual with whom the appointment is scheduled will be implemented.

In the bottom panel the user will find a list of follow-up activities scheduled for the shown date. To go to the contact information to which the activity pertains, click on the activity's row.

Back in the Company People Follow-Ups view, the bottom panel contains a list of correspondences sent to the shown individual. Correspondences, although generically referred to as "letters" can be of type Mail, Fax, or E-Mail. To create a new correspondence, click the New Letter button. To select a saved template to use for a correspondence, click the Use Template button (this button is also available in the correspondence detail view). Clicking on a correspondence in the list will take the viewer to the detail view of that correspondence.

In the correspondence detail view, three buttons have been added or changed in the blue bar at the top. Follow-Ups let the user return to the follow-up view, New Letter and Delete Letter allow the user to create and delete letters respectively. The bottom panel in this view contains the description or title, the creation date, and the body of the correspondence. The upper right panel helps the user create the correspondence using mail merge fields. Although a user can type directly into the body field of the correspondence, merge fields can insert where information specific to the contact record is required. Place the cursor at the desired insertion point in the body, select a merge field from the pop-up list in the upper right panel, and click the Insert button. Using the radio buttons "Show Fields" and "Show Values" change the body of the correspondence to reflect the merge fields or the actual information respectively.

A correspondence may be saved as a template if the user intends to use it in the future or with different contact records. For example, if a generic message is sent to all leads, one letter can be created and saved as a template for use with each contact. After a letter has been created, clicking on the Save Template button. All templates are saved with the

Description of the correspondence followed by a "(TEMP)" indicating that it is a template. To access saved templates, click on the Use Template button in either the follow-up or correspondence detail views. Select a template from the list by clicking on its description.

A final feature included in this build of the Lead Tracking/Follow-Up system: When a contact's birthday is entered and the Card? Field is set to "Yes"; a reminder to mail a birthday message is automatically place in the Follow-Up activities list with a due date of 5 days prior to the contact's next birthday.