



ParkereSSe Contact Relations Track Application (PS.CRT)

Contents

Introduction	2
PS.CRT Console.....	3
Reports View	4
Import View	6
Contact Track Console.....	7
Ancillary Data Management	8
Address.....	8
Voice/Text	9
Online	10
Notes	11
Event	12
User Management	13
Company Dashboard	14
Person Dashboard	15
Prospect Dashboard	16
Common Screen Tools and Features	17
Dashboard Sync Data Feature	18
Company Synchronization	18
Person Synchronization.....	21

Introduction

The ParkereSSE Contact Relations Track application, PS.CRT, manages Company, Person, and Prospect contacts information and status in a central database. PS.CRT is a multi-user application typically installed on a network server. A login is required to access application functions; user entitlements tailor function access at the user level.

A key issue with CRM applications is the ability to manage extensive amounts of data and drill down to specific items of interest. PS.CRT addresses this problem with independent data views of not just Company, Person, and Prospects, but associated ancillary address, online, voice/text, notes and events information. By default, these views display all data but with a single click, the views are synchronized to the respective Company, Person, or Prospect. The user can easily navigate between different data sets and from contact to contact for data review and edit. A history of recently accessed contacts is maintained for one-click selection and data synchronization to continue where you left off.

Company, Person, and Prospect views are separate windows referred to as Dashboards. Ancillary data (Address, Online, Voice/Text, Notes, Events) views are in separate tabs in 'Ancillary Data Management' on the PS.CRT Console. All of these views have the same look and feel as detailed in Section 'Common Screen Tools and Features'.

Typical full view configuration:

The image displays three screenshots of the PS.CRT application interface. The top-left screenshot shows the 'Contact History' window with a table of contact events. The top-right screenshot shows the 'Person Table' window with a list of persons and their details. The bottom-left screenshot shows the 'Prospect Table' window with a list of prospects and their details. The bottom-right screenshot shows the 'Company Table' window with a list of companies and their details.

Contact History

EffectiveDate	Company/Name	Person/Name	Prospect/Type
10/15/2018 11:27 AM	Best TPA On Planet	Friendly, Randy	N/A
10/15/2018 8:22 AM	Best TPA On Planet	N/A	N/A
10/11/2018 4:10 PM	Best TPA On Planet	Friendly, Randy	Prospect - Person
10/11/2018 4:09 PM	Best TPA On Planet	N/A	Prospect - Person
10/11/2018 3:50 PM	Fantastic Goings On Hear	Myosmorn, Tootin	N/A
10/11/2018 3:50 PM	Fantastic Goings On Hear	N/A	N/A
10/11/2018 3:49 PM	Environment Safety Comp	Leeloo	N/A
10/11/2018 3:49 PM	Environment Safety Comp	Element, Water	N/A
10/11/2018 3:48 PM	Environment Safety Comp	Element, Fire	N/A
10/11/2018 3:48 PM	Environment Safety Comp	Element, Wind	N/A
10/11/2018 3:48 PM	Environment Safety Comp	Element, Earth	N/A
10/11/2018 3:47 PM	Environment Safety Comp	N/A	N/A
10/11/2018 3:47 PM	Elastic Is No Stretch	Bandman, Rubber	N/A
10/11/2018 3:47 PM	Elastic Is No Stretch	Armstrong, Stretch	N/A

Person Table

LastName	FirstName	CompanyName	JobTitle	Gender
Brunner	Road	Acme Best Seed	SVP, Plan Consulting	Unkn
Besser	Joe	Best Admin Software Co...	Director of Retirement Policy, Anet...	Unkn
Fyne	Larry	Best Admin Software Co...	Director, Key Accounts	Unkn
Howard	Curly	Best Admin Software Co...	Director, Key Account Marketing	Unkn
Howard	Moe	Best Admin Software Co...	Director of Political Affairs	Unkn
Howard	Shemp	Best Admin Software Co...	Director of Technical Education	Unkn
Max	Chico	Best Admin Software Co...	Chief of Sales and Marketing	Unkn
Max	Groucho	Best Admin Software Co...	Director of Legislative Affairs	Unkn
Max	Harpo	Best Admin Software Co...	Program Manager, Virtual Events	Unkn

Prospect Table

Active	Company/Name	Person/Name	Prospect/ID	Company/ID	Person/ID
Active: TRUE	Best TPA On Pla	Friendly, Randy	2	140	586
	Best TPA On Pla	N/A	1	140	0

Company Table

Full Name	Short Name	EN	Description
Acme Best Seed	AcmeBS		Wiley Coyote
Best Admin Software Company	BASIC		
Best TPA On Planet	BTOP		
Best TPA On Planet	BTOP		
Cat Scratch Brewery	CSBrew		
Delivery In A Minute	DIAM		
Dog's Life Is Good	DLUG		
Elastic Is No Stretch	EINS		
Environment Safety Comp	ESC		

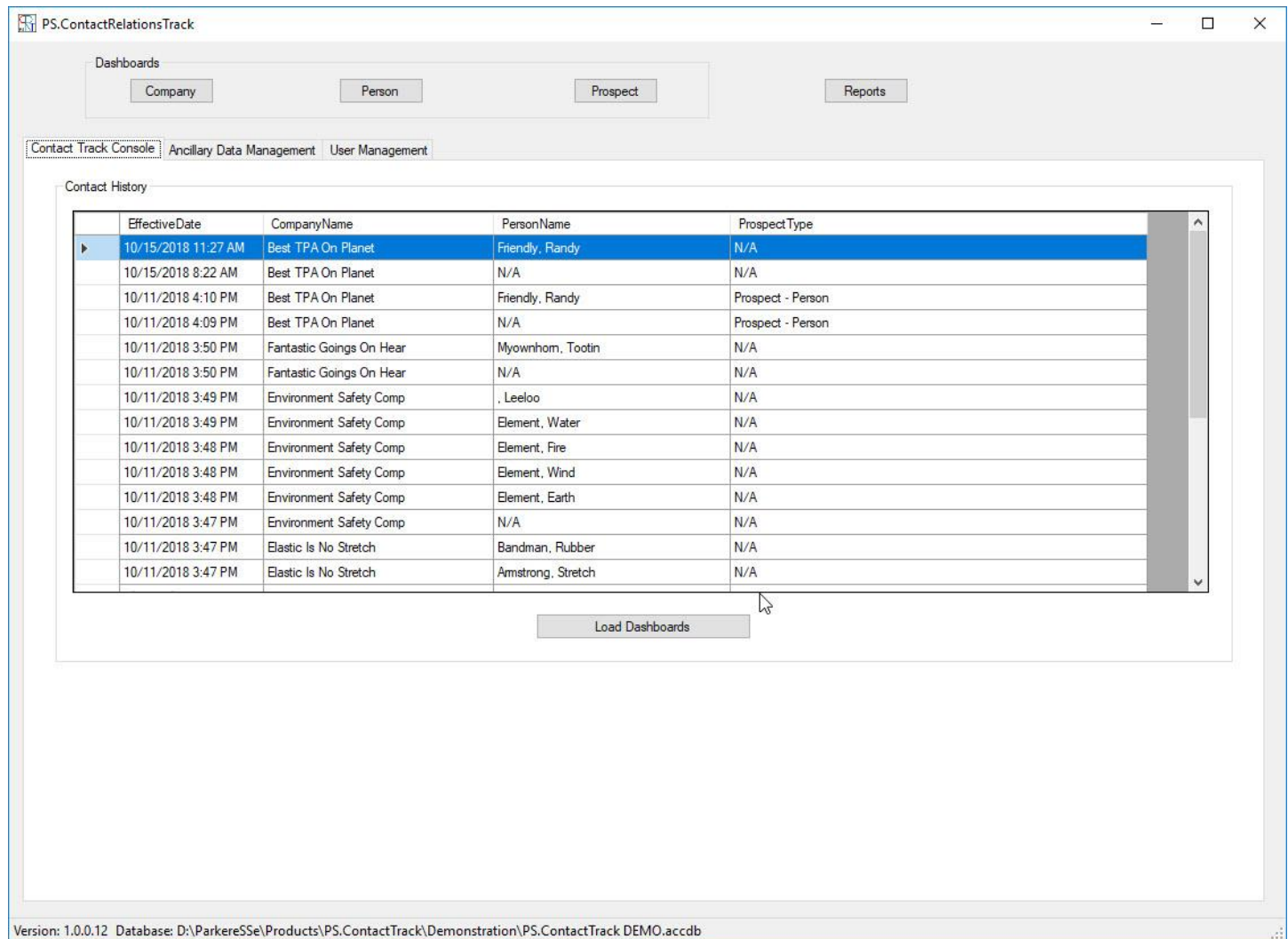
Screen locations and sizes, configuration items, and Contact History are all stored for each User and restored at the next login.

The following sections provide information on key components of PS.CRT.

PS.CRT Console

The PS.CRT Console is the shown when the application starts and contains the following features:

- Contact Track Console
- Ancillary Data Management
- User Management



The status bar at the bottom of the screen provides the following information:

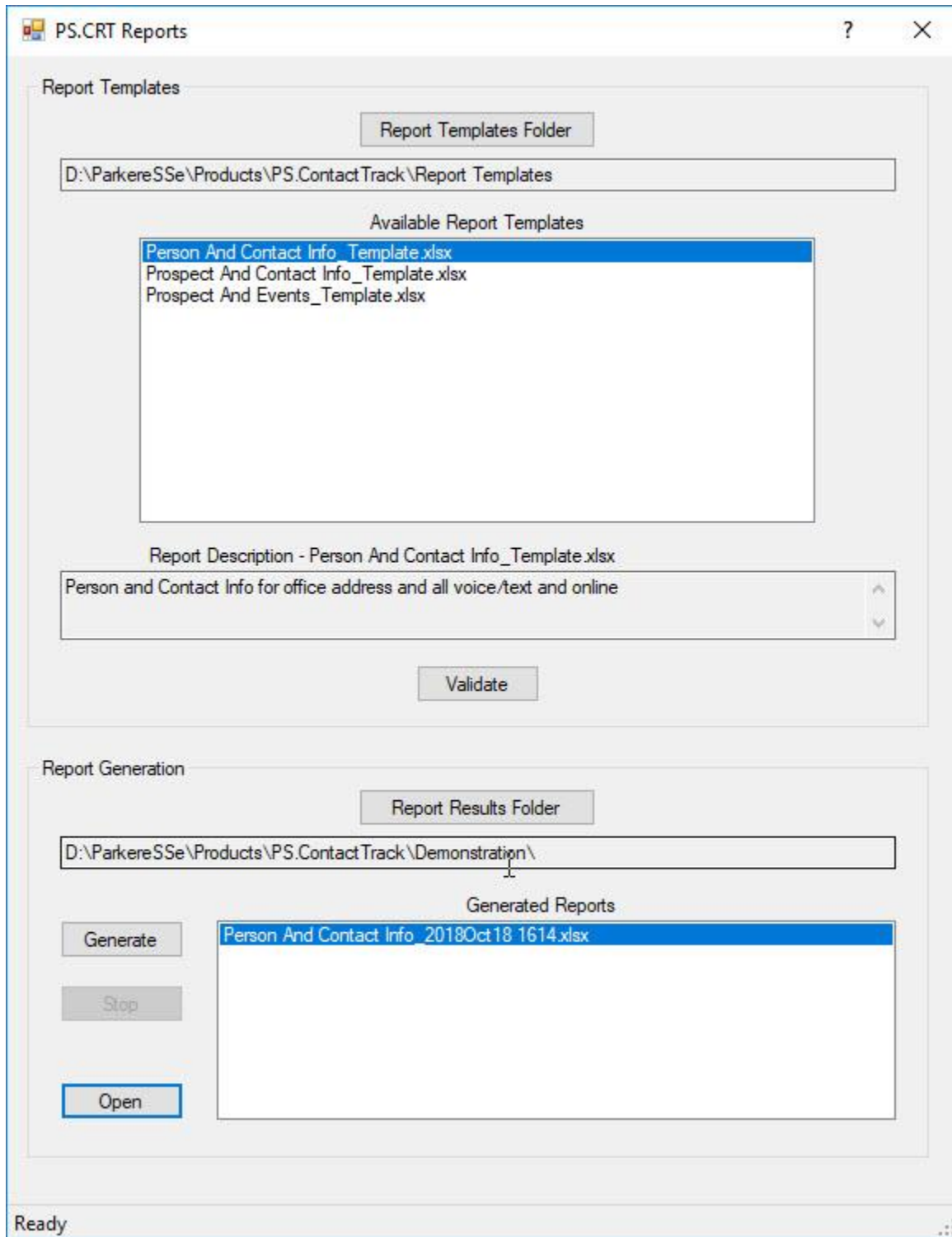
- PS.CRT version
- PS.CRT database file name
- Status messages during Ancillary Data Management functions

The Dashboard Launch is the button group at the top of the screen. Selecting a button opens the respective Dashboard view. When the view is open, the respective Dashboard button is disabled.

Console feature details are provided in the following sections.

Reports View

The Reports View is opened with the Reports button on the main screen. Report templates created in Excel define the data, layout, filter, and sort criteria and are used to generate reports in Excel:



The Reports view features include:

- User-selectable Report Template and Report Results folders
- Pre-defined reports
- Using the pre-defined templates as tutorials, custom templates can be created in Excel and added to the template folder
- Validate function to analyze selected template files for correct data references and layout, filter, and sort criteria
- Generate reports for one or more selected templates
- Open generated reports.

Generated reports have a header row with column names specified in the template and Filter enabled. All data cells have work wrap enabled and a full border. A Freeze Pane is set based on the template as well:

Last Name	First Name	Company	Job Title	Address Line 1	Address Line 2	Address Line 3	City	State	Postal Code	Voice/Text Number	Voice/Text Type	Online Address	Online Type
	Leeloo	Environment Safety Comp	Relationship Manager, Pension Outsourcing	9 My Street			Philadelphia	PA - Pennsylvania	19103	000.000.9	Direct (Office)	Office_9@demooffice.com	Email (work)
	Underdog	Dog's Life Is Good	Risk and Retirement Services Manager	184 My Street			Memphis	TN - Tennessee	38138-7414	000.000.184	Direct (Office)	LastName_184@demooffice.com	Email (work)
Armstrong	Stretch	Elastic Is No Stretch		1142 My Street			Austin	TX - Texas	78759	000.000.1142	Direct (Office)	Office_1142@demooffice.com	Email (work)
Bandman	Rubber	Elastic Is No Stretch	Managing Director-Retirement Plan Administration	115 My Street	AUSTINB-02-303		Austin	TX - Texas	78759	000.000.115	Direct (Office)	Office_115@demooffice.com	Email (work)
Besser	Joe	Best Admin Software Company	Director of Retirement Policy, American Retirement Association	797 My Street			Arlington	VA - Virginia	22203-1648	000.000.797	Direct (Office)	Office_797@demooffice.com	Email (work)
Bigshoes	Elaine	Best TPA On Planet	PRESIDENT	595 My Street			Westmont	IL - Illinois	60559-1100	000.000.595	Direct (Office)	Office_595@demooffice.com	Email (work)
Element	Wind	Environment Safety Comp	Executive VP	1091 My Street			Philadelphia	PA - Pennsylvania	19103-4714	000.000.1091	Direct (Office)	Office_1091@demooffice.com	Email (work)
Element	Earth	Environment Safety Comp	Managing Consultant	1052 My Street			Philadelphia	PA - Pennsylvania	19103-4714	000.000.1052	Direct (Office)	Office_1052@demooffice.com	Email (work)
Element	Water	Environment Safety Comp	Senior Vice President	512 My Street			Philadelphia	PA - Pennsylvania	19103-4714	000.000.512	Direct (Office)	Office_512@demooffice.com	Email (work)
Element	Fire	Environment Safety Comp	Vice President /Director of Client Accounts	222 My Street			Philadelphia	PA - Pennsylvania	19103-4714	000.000.222	Direct (Office)	Office_222@demooffice.com	Email (work)
Friendly	Randy	Best TPA On Planet	Customer Support	598 My Street			Westmont	IL - Illinois	60559-1100	000.000.598	Direct (Office)	Office_598@demooffice.com	Email (work)
Fyne	Larry	Best Admin Software Company	Director, Key Accounts	1023 My Street			Arlington	VA - Virginia	22203-1648	000.000.1023	Direct (Office)	Office_1023@demooffice.com	Email (work)
Gonzalas	Speedy	Delivery In A Minute	PRESIDENT	290 My Street			Rockville	MD - Maryland	20852-3149	000.000.290	Direct (Office)	Office_290@demooffice.com	Email (work)
Howard	Moe	Best Admin Software Company	Director of Political Affairs	1011 My Street			Arlington	VA - Virginia	22203-1648	000.000.1011	Direct (Office)	Office_1011@demooffice.com	Email (work)
Howard	Moe	Best Admin Software Company	Director of Technical Affairs	157 My Street			Philadelphia	PA - Pennsylvania	19103-4714	000.000.157	Direct (Office)	Office_157@demooffice.com	Email (work)

Import View

The Import View is opened with the Import button on the main screen and provides a utility to import data from Excel workbooks:

The screenshot shows the 'PS.CRT Import' window. The 'Import Process' section has a 'Select Import File' button, a text box containing 'D:\ParkereSSE\Products\PS.ContactTrack\Demonstration\Demo Import File.xlsx', and 'Validate', 'Start', and 'Stop' buttons. The 'Import Results' section has a 'Validation and Import Results File' text box containing 'oducts\PS.ContactTrack\Demonstration\Demo Import File_Validation_2018Oct27 0619.xlsx'. Below this are two tables: 'File Record Counts' and 'Counts By Table'. The 'File Record Counts' table has rows for 'Processed', 'Imported', 'Skipped', and 'Errored' with values 3, 3, 2, and 0 respectively. The 'Counts By Table' table has columns for 'Person', 'Company', and 'Prospect', with rows for 'New', 'Updated', 'Skipped', and 'Errored' showing counts for each table. An 'Open Results File' button is at the bottom. The status bar at the bottom left says 'Ready'.

Category	Count
Processed	3
Imported	3
Skipped	2
Errored	0

	Person	Company	Prospect
New	3	1	0
Updated	0	0	0
Skipped	0	2	0
Errored	0	0	0

Features include:

Fully customizable workbook layouts

Validate function to preview import errors and warnings in a results file. Also indicates new and updated Company and Person records

Import process stores results, including errors and warnings, to a results file for review.

Validation and Import processes create a results file with status (skip, update, insert, error, warning) of each table and the original input data row

This allows for direct corrections in the results file and re-processing of the edited file.

Import Control columns can be inserted to force the table data to be skipped, inserted, or updated.

Contact Track Console

The Contact Track Console shows a list of recently accessed Company, Person, and Prospect contacts. An item can be selected and all Dashboards (Company, Person, Prospect) loaded and initialized to the selection with the 'Load Dashboards' button:

Contact Track Console

Ancillary Data Management

User Management

Contact History

	EffectiveDate	CompanyName	PersonName	ProspectType
▶	10/11/2018 4:11 PM	Best TPA On Planet	Friendly, Randy	N/A
	10/11/2018 4:10 PM	Best TPA On Planet	Friendly, Randy	Prospect - Person
	10/11/2018 4:09 PM	Best TPA On Planet	N/A	N/A
	10/11/2018 4:09 PM	Best TPA On Planet	N/A	Prospect - Person
	10/11/2018 3:50 PM	Fantastic Goings On Hear	Myownhom, Tootin	N/A
	10/11/2018 3:50 PM	Fantastic Goings On Hear	N/A	N/A
	10/11/2018 3:49 PM	Environment Safety Comp	, Leeloo	N/A
	10/11/2018 3:49 PM	Environment Safety Comp	Element, Water	N/A
	10/11/2018 3:48 PM	Environment Safety Comp	Element, Fire	N/A
	10/11/2018 3:48 PM	Environment Safety Comp	Element, Wind	N/A
	10/11/2018 3:48 PM	Environment Safety Comp	Element, Earth	N/A
	10/11/2018 3:47 PM	Environment Safety Comp	N/A	N/A
	10/11/2018 3:47 PM	Elastic Is No Stretch	Bandman, Rubber	N/A
	10/11/2018 3:47 PM	Elastic Is No Stretch	Armstrong, Stretch	N/A

Load Dashboards

Company, Person, and Prospect contacts are separately tracked, but related and displayed in the list as follows:

- A Company contact can be tracked independent of any Person contacts and can optionally be a Prospect.
- A Person contact can optionally include the associated Company and can optionally be a Prospect.
- A Prospect can be either a Company or a Person indicated by the ProspectType.

The 'Load Dashboards' button will open the Company, Person, and Prospect Dashboards, filtering to the selected contact.

Ancillary Data Management

This feature provides separate, tab views for Address, Voice/Text, Online, Notes, and Events data associated with a contact (Company, Person, or Prospect).

Address

Address

Voice/Text

Online

Notes

Events

Address Table

Filter Criteria

Active: TRUE
AddressType: All
State: All
Province: All
Country: All

Sort Criteria

AddressType: Descending
EffectiveDate: Descending
State: No Sort
Province: No Sort

Change Filter/Sort

Records 38

	EffectiveDate	ShortName	AddressType	Active	AddressLine1	AddressLine2	AddressL
▶	10/1/2018		Office	<input checked="" type="checkbox"/>	582 My Street		
	10/1/2018		Office	<input checked="" type="checkbox"/>	9 My Street		
	10/1/2018		Office	<input checked="" type="checkbox"/>	835 My Street	Suite 6	
	10/1/2018		Office	<input checked="" type="checkbox"/>	797 My Street		
	10/1/2018		Office	<input checked="" type="checkbox"/>	632 My Street		
	10/1/2018		Office	<input checked="" type="checkbox"/>	617 My Street		
	10/1/2018		Office	<input checked="" type="checkbox"/>	598 My Street		
	10/1/2018		Office	<input checked="" type="checkbox"/>	597 My Street		
	10/1/2018		Office	<input checked="" type="checkbox"/>	1012 My Street		
	10/1/2018		Office	<input checked="" type="checkbox"/>	595 My Street		

Address Record

ID # 582

Company N/A

Person Supportit, Jane | Best TPA On Planet

☒ Active

Effective Date 10/01/2018 00:00:00

ShortName

Type Office

Priority Primary

Line 1 582 My Street

City Westmont

Country

Line 2

State IL - Illinois

Postal Code 60559-1100

Line 3

Province

Comment

Address specific features include:

- Active status and Effective Date to track historical records and changes.
- ShortName and Comment fields to document the record purpose or background.

Voice/Text

Address

Voice/Text

Online

Notes

Events

Voice/Text Table

Filter Criteria

Active: TRUE
VoiceTextType: All
Priority: All
VoiceTextID: All

Sort Criteria

EffectiveDate: Descending
VoiceTextType: Ascending
Priority: Ascending

Change Filter/Sort

Records 38

	EffectiveDate	ShortName	VoiceTextNumber	VoiceTextType	Active	TextOption	Prio
▶	10/1/2018	Temp VoiceText	000.000.582	Direct (Office)	<input checked="" type="checkbox"/>	N/A	Unkr
	10/1/2018	Temp VoiceText	000.000.9	Direct (Office)	<input checked="" type="checkbox"/>	N/A	Unkr
	10/1/2018	Temp VoiceText	000.000.835	Direct (Office)	<input checked="" type="checkbox"/>	N/A	Unkr
	10/1/2018	Temp VoiceText	000.000.797	Direct (Office)	<input checked="" type="checkbox"/>	N/A	Unkr
	10/1/2018	Temp VoiceText	000.000.632	Direct (Office)	<input checked="" type="checkbox"/>	N/A	Unkr
	10/1/2018	Temp VoiceText	000.000.617	Direct (Office)	<input checked="" type="checkbox"/>	N/A	Unkr
	10/1/2018	Temp VoiceText	000.000.598	Direct (Office)	<input checked="" type="checkbox"/>	N/A	Unkr
	10/1/2018	Temp VoiceText	000.000.597	Direct (Office)	<input checked="" type="checkbox"/>	N/A	Unkr
	10/1/2018	Temp VoiceText	000.000.1012	Direct (Office)	<input checked="" type="checkbox"/>	N/A	Unkr
	10/1/2018	Temp VoiceText	000.000.595	Direct (Office)	<input checked="" type="checkbox"/>	N/A	Unkr

Voice/Text Record

ID # 582

Company N/A

Person Supportit, Jane | Best TPA On Planet

☒ Active

Effective Date 10/01/2018 00:00:00

ShortName Temp VoiceText

Type Direct (Office)

Priority Unknown

Number 000.000.582

Text Option N/A

Additional Instructions

Comment

Voice/Text specific features include:

- Voice/Text Type (Office, Home, Mobile, Direct (Office))
- Priority (Primary, Secondary, Urgent)
- Active status and Effective Date to track historical records and changes.
- ShortName and Comment fields to document the record purpose or background.

Online

Address

Voice/Text

Online

Notes

Events

Online Table

Filter Criteria

Active: TRUE
Online Type: All
Priority: All
OnlineID: All

Sort Criteria

EffectiveDate: Descending
Online Type: Ascending
Priority: Ascending

Change Filter/Sort

Records 38

EffectiveDate	ShortName	OnlineAddress	Online Type	Active
10/5/2018	Sep 2018 Email Contact	LastName_184@demooffice.com	Email (work)	<input checked="" type="checkbox"/>
10/5/2018	Sep 2018 Email Contact	LastName_1048@demooffice.com	Email (work)	<input checked="" type="checkbox"/>
10/1/2018	Temp Work Email	Office_582@demooffice.com	Email (work)	<input checked="" type="checkbox"/>
10/1/2018	Temp Work Email	Office_835@demooffice.com	Email (work)	<input checked="" type="checkbox"/>
10/1/2018	Temp Work Email	Office_797@demooffice.com	Email (work)	<input checked="" type="checkbox"/>
10/1/2018	Temp Work Email	Office_632@demooffice.com	Email (work)	<input checked="" type="checkbox"/>
10/1/2018	Temp Work Email	Office_617@demooffice.com	Email (work)	<input checked="" type="checkbox"/>
10/1/2018	Temp Work Email	Office_598@demooffice.com	Email (work)	<input checked="" type="checkbox"/>
10/1/2018	Temp Work Email	Office_597@demooffice.com	Email (work)	<input checked="" type="checkbox"/>
10/1/2018	Temp Work Email	Office_9@demooffice.com	Email (work)	<input checked="" type="checkbox"/>

Online Record

ID # 184

Company N/A

Person Underdog | Dog's Life Is Good

☒ Active
Effective Date 10/05/2018 00:00:00
ShortName Sep 2018 Email Contact

Type Email (work)
Priority Primary

Address/URL LastName_184@demooffice.com

Additional Instructions

Comment

Online specific features include:

- Online Type (Website, Email (work, personal), Twitter)
- Priority (Primary, Secondary, Urgent)
- Active status and Effective Date to track historical records and changes.
- ShortName and Comment fields to document the record purpose or background.

Notes

Address

Voice/Text

Online

Notes

Events

Note Table

Filter Criteria

Prospect: All
Note Type: All
NoteID: All

Sort Criteria

EffectiveDate: Descending
Note Type: Ascending

Change Filter/Sort

Records 40

EffectiveDate	Note Type	NoteText	NoteID	CompanyName	PersonName
10/1/2018	General	New Company added	1279	Acme Bird Seed	N/A
10/1/2018	General	New Company added	1278	Delivery In A Min	N/A
10/1/2018	General	New Company added	1277	Fantastic Goings ...	N/A
10/1/2018	General	New Company added	1276	Environment Saf...	N/A
10/1/2018	General	New Company added	1208	Best Admin Softw...	N/A
10/1/2018	General	New Person added	1012	N/A	Marx, Groucho I
10/1/2018	General	New Company added	1175	Cat Scratch Brew	N/A
10/1/2018	General	New Person added	1013	N/A	Marx, Harpo I Be
10/1/2018	General	New Person added	1135	N/A	Howard, Curly I E
10/1/2018	General	New Person added	1091	N/A	Element, Wind I

Note Record

ID # 1318

☒ Prospect

Company Best TPA On Planet

Person Friendly, Randy

Effective Date 10/11/2018 16:10:16

Type General

Note New Prospect added

Notes specific features include:

- Note Type (General, Background/History, Personal, Confidential, Business, Warning/Concern)
- Effective Date to track historical records and changes.
- Multi-line Note field for extensive text.

Event

Address
Voice/Text
Online
Notes
Events

Event Table

Filter Criteria

Prospect: All
Event Type: All
Event ID: All

Sort Criteria

EffectiveDate: Descending
Event Type: Ascending

Change Filter/Sort

Records 40

EffectiveDate	Event Type	Comment	EventID	CompanyName	PersonN
10/11/2018 4:11	Online Contact	Emailed Company profile	598	N/A	Friendly,
10/11/2018 4:10	General	New Prospect added	1318	N/A	N/A
10/11/2018 4:09	General	New Prospect added	1317	N/A	N/A
10/1/2018	General	New Person added	582	N/A	Supportit,
10/1/2018	General	New Person added	1011	N/A	Howard,
10/1/2018	General	New Person added	835	N/A	Parker, S
10/1/2018	General	New Person added	797	N/A	Besser, J
10/1/2018	General	New Person added	632	N/A	Mathsabr
10/1/2018	General	New Person added	617	N/A	Opendoo
10/1/2018	General	New Person added	597	N/A	Sysgeek,

Event Record

ID # 598

☐ Prospect

Company N/A

Person Friendly, Randy I Best TPA On Planet

Effective Date 10/11/2018 16:11:13

Type Online Contact

Comment

Emailed Company profile

Events specific features include:

- Event Type (General, Voice, Email, Text, Online, Document, Service, Product)
- Effective Date to track historical records and changes.
- Multi-line Comment field for extensive text.

User Management

This screen manages users with these features:

- Edit Entitlements
 - These provide access to various functions in the application
- Add User
- Delete User
- Reset Password

Contact Track Console

Ancillary Data Management

User Management

UserID

StevePS

Available

Company Edit
Person Edit
Prospect Edit
Default Sort/Filter Edit
Extract Data
Edit Ancillary Data
User Management

Entitlements

>

>>

<

<<

Current

SuperUser

Update

Cancel/Restore

Delete

New User

UserID

Temporary Password

Add

Set Temporary Password for Selected UserID

Temporary Password

Update

Company Dashboard

The Company Dashboard is a separate window to view and edit Company contact information:

PS.ContactRelationsTrack: Company

Company Table

Filter Criteria

Short Name: All
EIN: All

Sort Criteria

Full Name: Ascending
Short Name: Ascending
EIN: No Sort

Change Filter/Sort

Records 10

FullName	ShortName	EIN	Description
Acme Bird Seed	AcmeBS		Wiley Coyote
Best Admin Software Company	BASC		
Best TPA On Planet	BTOP		
Best TPA On Planet	BTOP		
Cat Scratch Brewery	CSBrew		
Delivery In A Minute	DIAM		
Dog's Life Is Good	DLIG		
Elastic Is No Stretch	EINS		
Environment Safety Comp	ESC		

Company Record

ID # 140 ☒ Prospect

Full Name Best TPA On Planet Short Name BTOP

EIN

Description

New Edit Save Cancel Delete

Sync Data Extract Close Screen

Company specific features include:

- Prospect Indicator, checked if Company is also a direct Prospect.
- Sync Data button that filters all Ancillary views and Dashboards to records associated with the selected Company.

Person Dashboard

The Person Dashboard is a separate window to view and edit Person contact information:

PS.ContactRelationsTrack: Person

Person Table

Filter Criteria

Company: All

Sort Criteria

Company: Ascending
LastName: Ascending
FirstName: Ascending

Change Filter/Sort

Records 29

LastName	FirstName	CompanyName	JobTitle	GenderIdent
Howard	Moe	Best Admin Softw...	Director of Political Affairs	Unknown
Howard	Shemp	Best Admin Softw...	Director of Technical Education	Unknown
Marx	Chico	Best Admin Softw...	Chief of Sales and Marketing	Unknown
Marx	Groucho	Best Admin Softw...	Director of Legislative Affairs	Unknown
Marx	Harpo	Best Admin Softw...	Program Manager, Virtual Events	Unknown
Marx	Zeppo	Best Admin Softw...	Director, Key Accounts	Unknown
Bigshoes	Elaine	Best TPA On Pla	PRESIDENT	Unknown
Friendly	Randy	Best TPA On Pla	Customer Support	Unknown
Mathsabreeze	Edward	Best TPA On Pla	Enrolled Actuary	Unknown

Person Record

ID # 598 ☒ Prospect Company Best TPA On Planet

Salutation Gender Unknown Prefix Suffix

First Name Randy Middle Name Last Name Friendly

Job Title Customer Support

New Edit Save Cancel Delete

Sync Data Extract Close Screen

Person specific features include:

- Prospect Indicator, checked if Person is also a Prospect.
- Company associated with the Person; optional and can be set to 'N/A'.
- Sync Data button that filters all Ancillary views and Dashboards to records associated with the selected Person.

Prospect Dashboard

The Prospect Dashboard is a separate window to view and edit Prospect contact information:

PS.ContactRelationsTrack: Prospect

Prospect Table

Filter Criteria

Active: TRUE

Sort Criteria

CompanyName: Ascending
PersonName: Ascending
Active: No Sort

Change Filter/Sort

Records 2

	Active	CompanyName	PersonName	ProspectID	CompanyID	PersonID
▶	<input checked="" type="checkbox"/>	Best TPA On Pla	Friendly, Randy	2	140	598
	<input checked="" type="checkbox"/>	Best TPA On Pla	N/A	1	140	0

Prospect Record

ID # 2 Company Best TPA On Planet Person Friendly, Randy

☒ Active

New Edit Save Cancel Delete

Sync Data Extract Close Screen

Prospect specific features include:

- Company, Person, or Person with associated Company prospect type.
- Active status to track historical Prospects.
- Sync Data button that filters all Ancillary views and Dashboards to records associated with the selected Prospect.

Common Screen Tools and Features

All views and functions provide the following tools and features:

The screenshot shows the 'PS.ContactRelationsTrack: Company' interface. It features a 'Company Table' on the left with 'Filter Criteria' and 'Sort Criteria' sections. The 'Filter Criteria' section shows 'Short Name: All' and 'EIN: All'. The 'Sort Criteria' section shows 'Full Name: Ascending', 'Short Name: Ascending', and 'EIN: No Sort'. Below these is a 'Change Filter/Sort' button and a '# Records' field showing '10'. The main area is a 'DataGrid' table with columns: FullName, ShortName, EIN, and Description. The table contains 10 rows, with the 4th row 'Best TPA On Planet' highlighted. A 'Search' button is located above the table. The 'Window Size' is indicated by a red arrow pointing to the top right corner. The 'Data Edit' section is below the table, showing fields for 'ID #', 'Full Name', 'Short Name', 'EIN', and 'Description'. The 'ID #' field contains '140' and the 'Prospect' checkbox is checked. Below these fields are 'New', 'Edit', 'Save', 'Cancel', and 'Delete' buttons. The 'Button Bar' at the bottom contains 'Sync Data', 'Extract', and 'Close Screen' buttons.

FullName	ShortName	EIN	Description
Acme Bird Seed	AcmeBS		Wiley Coyote
Best Admin Software Company	BASC		
Best TPA On Planet	BTOP		
Best TPA On Planet	BTOP		
Cat Scratch Brewery	CSBrew		
Delivery In A Minute	DIAM		
Dog's Life Is Good	DLIG		
Elastic Is No Stretch	EINS		
Environment Safety Comp	ESC		

- **Window Size:** The Window size can be changed by dragging the horizontal/vertical borders. The DataGrid resizes to fit the new window showing more or less rows and columns.
- **DataGrid:** View-only full record data. Row can be selected by clicking on a cell or left-side row border. Select row is highlighted and data shown in the Data Edit section. Data column widths can be adjusted.
- **Search:** Clicking on a text valued column header brings up a Search window. Text (full or portion) can be entered and the first row that contains the text will be highlighted in the DataGrid. A Next Row button finds the next row with the test. Closing the Search window leaves the last found row selected (highlighted).
- **Filter/Sort:** Displays the current data filter and sort criteria, reflected in the displayed data in the DataGrid. Selecting 'Change Filter/Sort' brings up a window where filter and sort options can be edited. A Default option is provided to restore the application defaults for the function.
- **Data Edit:** Displays data for the selected DataGrid row. This is where data is edited.
- **Button Bar:**
 - Provides options to Edit, Save and Delete the selected DataGrid row. New rows can also be created. Not all buttons are available for all functions.
 - Extract button writes current DataGrid rows to an Excel workbook. Current Filter and Sort criteria are also written to the workbook.
 - Close Screen button is available on Dashboard views to close the window.

Dashboard Sync Data Feature

The Company, Person, and Prospect Dashboard views include a 'Sync Data' button that synchronizes all views by filtering Ancillary (address, online, voice/text, notes and events), and Dashboard data to the selected Dashboard record. Examples of the synchronization process follow.

Company Synchronization

Company Dashboard after 'Sync Data' selected:

PS.ContactRelationsTrack: Company

Company Table

Filter Criteria

Short Name: All
EIN: All

Sort Criteria

Full Name: Ascending
Short Name: Ascending
EIN: No Sort

Change Filter/Sort

Records 10

	FullName	ShortName	EIN	Description
	Acme Bird Seed	AcmeBS		Wiley Coyote
	Best Admin Software Company	BASC		
▶	Best TPA On Planet	BTOP		
	Best TPA On Planet	BTOP		
	Cat Scratch Brewery	CSBrew		
	Delivery In A Minute	DIAM		
	Dog's Life Is Good	DLIG		
	Elastic Is No Stretch	EINS		
	Environment Safety Comp	ESC		

Company Record

ID # 140 ☒ Prospect

Full Name Best TPA On Planet Short Name BTOP

EIN

Description

New Edit Save Cancel Delete

Sync Data Extract Close Screen

Note the 'Sync Data' button is now disabled indicating the views have been synchronized to this Company.

Person Dashboard after Company 'Sync Data':

PS.ContactRelationsTrack: Person

Person Table

Filter Criteria

Company: Selected

Sort Criteria

Company: Ascending
Last Name: Ascending
First Name: Ascending

Change Filter/Sort

Records 8

	LastName	FirstName	CompanyName	JobTitle	GenderIdentity
	Bigshoes	Elaine	Best TPA On Pla	PRESIDENT	Unknown
▶	Friendly	Randy	Best TPA On Pla	Customer Support	Unknown
	Mathsabreeze	Edward	Best TPA On Pla	Enrolled Actuary	Unknown
	Movingup	Akiko	Best TPA On Pla	Vice President	Unknown
	Opendoors	Sally	Best TPA On Pla	Director of Marketing	Unknown
	Salesguy	Bob	Best TPA On Pla	Sales Representative/Customer Su...	Unknown
	Supportit	Jane	Best TPA On Pla	VP Customer Support	Unknown
	Sysgeek	Fred	Best TPA On Pla	Vice President/Systems	Unknown

Person Record

ID # 598 ☒ Prospect Company Best TPA On Planet

Salutation Gender Unknown Prefix Suffix

First Name Randy Middle Name Last Name Friendly

Job Title Customer Support

New Edit Save Cancel Delete

Sync Data Extract Close Screen

Person data has been filtered to only show Persons associated with the selected Company.

Prospect Dashboard after Company 'Sync Data':

PS.ContactRelationsTrack: Prospect

Prospect Table

Filter Criteria

Active: TRUE

Sort Criteria

CompanyName: Ascending
PersonName: Ascending
Active: No Sort

Change Filter/Sort

Records 2

	Active	CompanyName	PersonName	ProspectID	CompanyID	PersonID
▶	<input checked="" type="checkbox"/>	Best TPA On Pla	Friendly, Randy	2	140	598
	<input checked="" type="checkbox"/>	Best TPA On Pla	N/A	1	140	0

Prospect Record

ID # 2 Company Best TPA On Planet Person Friendly, Randy

☒ Active

New Edit Save Cancel Delete

Sync Data Extract Close Screen

Prospect data has been filtered to only show records associated with the selected Company as a direct prospect or associated with a Person prospect.

Ancillary Event View after Company 'Sync Data':

Contact Track Console

Ancillary Data Management

User Management

Address

Voice/Text

Online

Notes

Events

Event Table

Filter Criteria

Prospect: All
Event Type: All
EventID: Selected

Sort Criteria

EffectiveDate: Descending
Event Type: Ascending

Change Filter/Sort

Records 1

	EffectiveDate	Event Type	Comment	EventID	CompanyName	PersonName	
▶	10/1/2018	General	New Company added	1316	Best TPA On Pla	N/A	0

< >

Event Record

ID # 1316

☐ Prospect

Company Best TPA On Planet

Person N/A

Effective Date 10/01/2018 00:00:00

Type General

Comment New Company added

New

Edit

Save

Cancel

Delete

Extract

Data shown for selected Company

Event data has been filtered to only show records associated with the selected Company. Highlighted text at the bottom right indicates the synchronization.

All other Ancillary views are also filtered to this Company.

Person Synchronization

Person Dashboard after 'Sync Data' selected:

PS.ContactRelationsTrack: Person

Person Table

Filter Criteria

Company: Selected

Sort Criteria

Company: Ascending
LastName: Ascending
FirstName: Ascending

Change Filter/Sort

Records 8

LastName	FirstName	CompanyName	JobTitle	Gender
Bigshoes	Elaine	Best TPA On Planet	PRESIDENT	Unknown
Friendly	Randy	Best TPA On Planet	Customer Support	Unknown
Mathsabreeze	Edward	Best TPA On Planet	Enrolled Actuary	Unknown
Movingup	Akiko	Best TPA On Planet	Vice President	Unknown
Opendoors	Sally	Best TPA On Planet	Director of Marketing	Unknown
Salesguy	Bob	Best TPA On Planet	Sales Representative/Customer Su...	Unknown
Supportit	Jane	Best TPA On Planet	VP Customer Support	Unknown
Sysgeek	Fred	Best TPA On Planet	Vice President/Systems	Unknown

Person Record

ID # 598 ☒ Prospect Company Best TPA On Planet

Salutation Gender Unknown Prefix Suffix

First Name Randy Middle Name Last Name Friendly

Job Title Customer Support

New Edit Save Cancel Delete

Sync Data Extract Close Screen

Note the 'Sync Data' button is now disabled indicating the views have been synchronized to this Person.

Company Dashboard after Person 'Sync Data':

PS.ContactRelationsTrack: Company

Company Table

Filter Criteria

Short Name: All
EIN: All

Sort Criteria

Full Name: Ascending
Short Name: Ascending
EIN: No Sort

Change Filter/Sort

Records 10

FullName	ShortName	EIN	Description
Acme Bird Seed	AcmeBS		Wiley Coyote
Best Admin Software Company	BASC		
Best TPA On Planet	BTOP		
Best TPA On Planet	BTOP		
Cat Scratch Brewery	CSBrew		
Delivery In A Minute	DIAM		
Dog's Life Is Good	DLIG		
Elastic Is No Stretch	EINS		
Environment Safety Comp	ESC		

Company Record

ID # 140 ☒ Prospect

Full Name Best TPA On Planet Short Name BTOP

EIN

Description

New Edit Save Cancel Delete

Sync Data Extract Close Screen

Company data has been row associated with the selected Person selected.