# ParkereSSe Ltd.
## Retirement Operations and Systems Consultants
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# ParkereSSe Contact Relations Track Application (PS.CRT)

## Contents

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# 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:



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
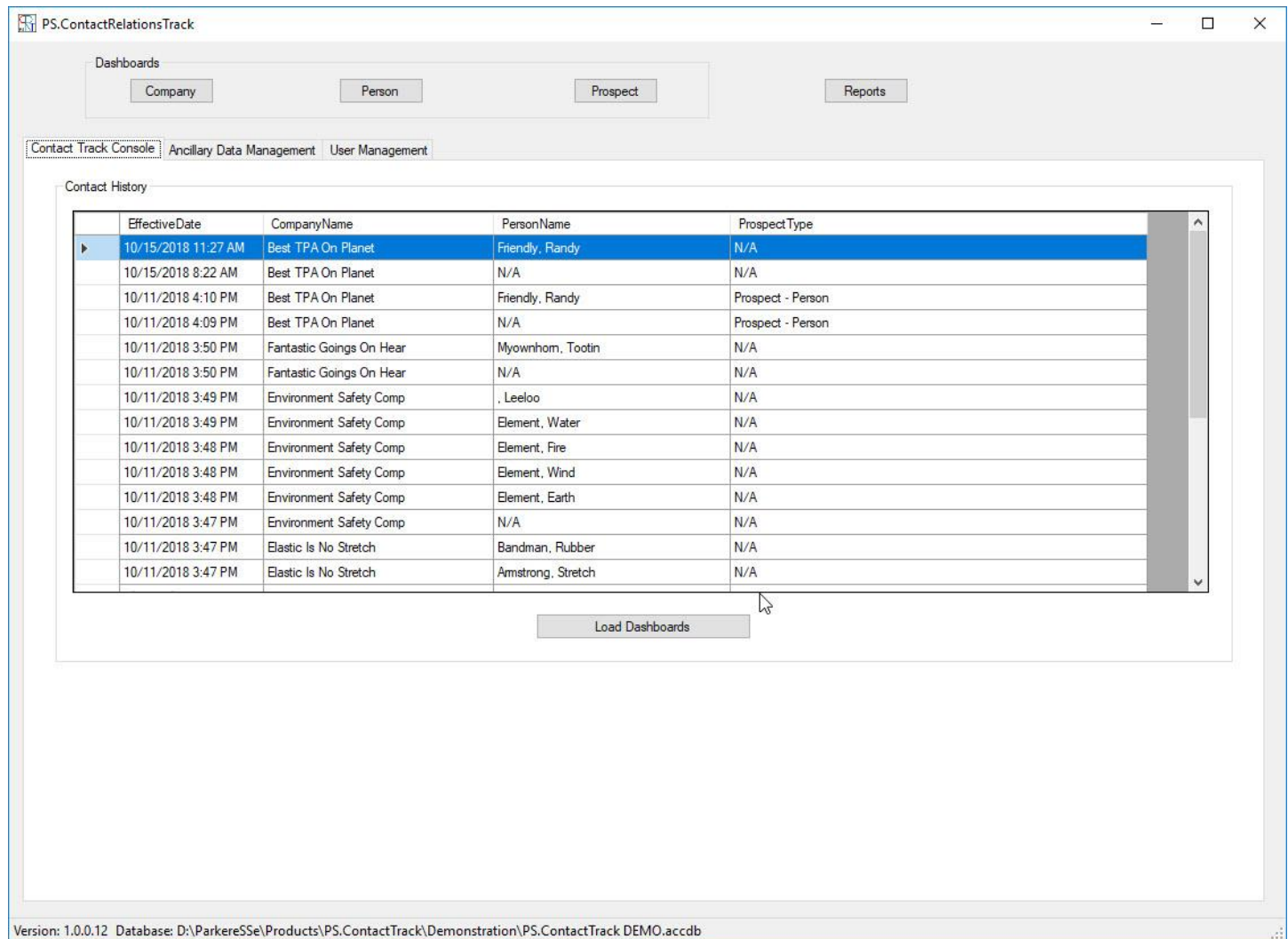


The status bar at the bottom of the screen provides the following information:

- 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:
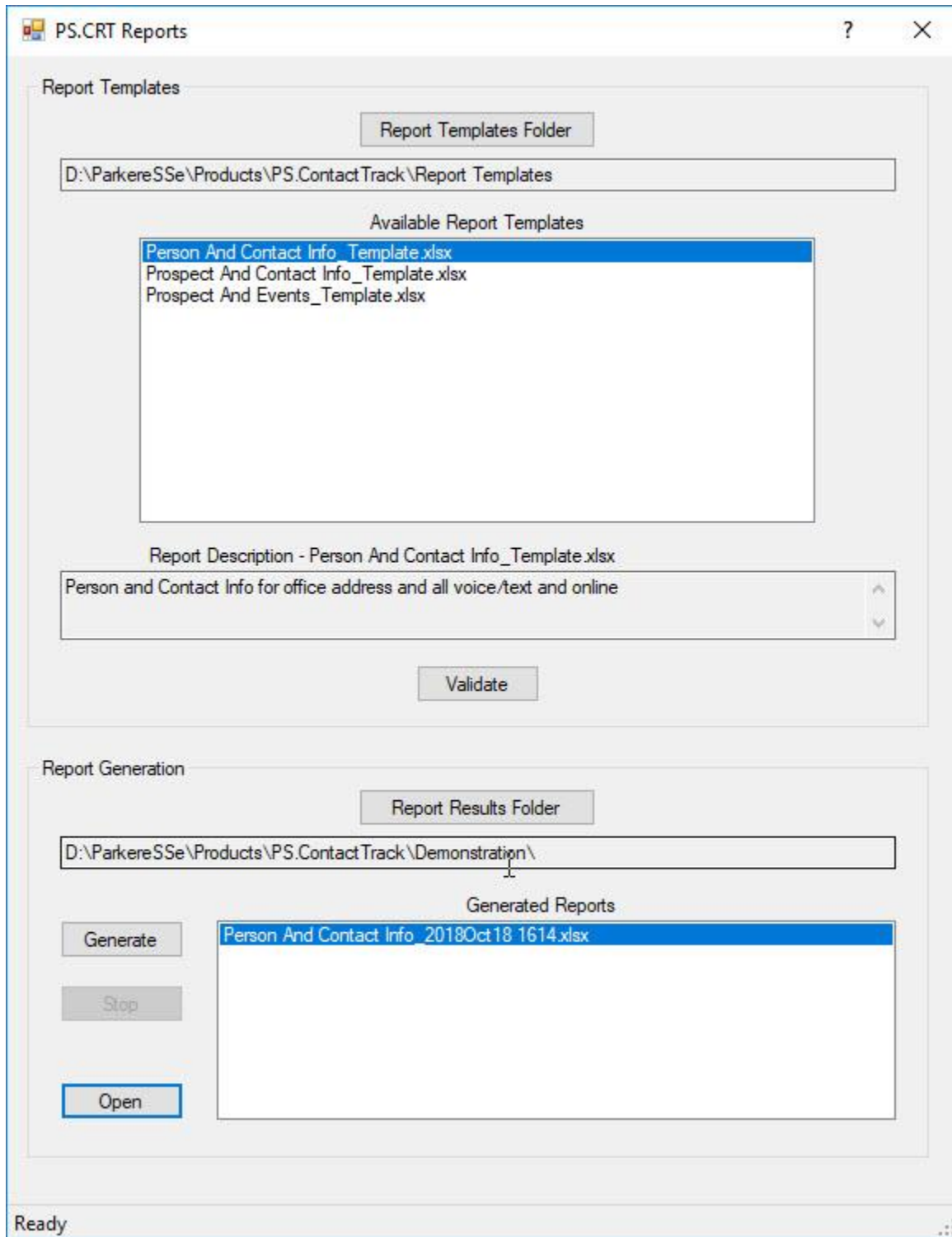
The Reports view features include:

- User-selectable Report Template and Report Results folders
- Pre-defined reports
- Using the pre-defined templates as tutorials, custom templates and 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 | Address Line 3 | City | State | PostalCode | 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 | Shemp | Best Admin Software Company | Director of Technical Education | 157 My Street |  |  | Thornwood | NY - New York | 10594-1601 | 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:



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:

| 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 | Myownhorn, 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 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) | ☑ | N/A | Unkr |
| 10/1/2018 | Temp VoiceText | 000.000.9 | Direct (Office) | ☑ | N/A | Unkr |
| 10/1/2018 | Temp VoiceText | 000.000.835 | Direct (Office) | ☑ | N/A | Unkr |
| 10/1/2018 | Temp VoiceText | 000.000.797 | Direct (Office) | ☑ | N/A | Unkr |
| 10/1/2018 | Temp VoiceText | 000.000.632 | Direct (Office) | ☑ | N/A | Unkr |
| 10/1/2018 | Temp VoiceText | 000.000.617 | Direct (Office) | ☑ | N/A | Unkr |
| 10/1/2018 | Temp VoiceText | 000.000.598 | Direct (Office) | ☑ | N/A | Unkr |
| 10/1/2018 | Temp VoiceText | 000.000.597 | Direct (Office) | ☑ | N/A | Unkr |
| 10/1/2018 | Temp VoiceText | 000.000.1012 | Direct (Office) | ☑ | N/A | Unkr |
| 10/1/2018 | Temp VoiceText | 000.000.595 | Direct (Office) | ☑ | 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

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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



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



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



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

# Company Dashboard

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



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:



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:



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:



- 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-size 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:
    - o 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.
    - o Extract button writes current DataGrid rows to an Excel workbook. Current Filter and Sort criteria are also written to the workbook.
    - o 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:**



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

**Person Dashboard after Company 'Sync Data':**



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

**Prospect Dashboard after Company 'Sync Data':**



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':**



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:**



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

**Company Dashboard after Person 'Sync Data':**



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