CMS Virtual Tour

Overview

Introduction

The functionality of CMS 6.5 is a DOS/Windows hybrid. You will still use most of the function keys as you did in the DOS version. With one exception, you can no longer use the Enter key to navigate. You will be limited to the Tab and Arrow keys to navigate this version. However, now you can also use your mouse throughout the application by clicking on the Hot Buttons located at the bottom of your screens.

In This Section

These topics are covered in this section.

Introduction to CMS

Overview

Introduction

CMS stands for Customer Management System. This section provides an overview of the CMS application.

CMS' primary function is to create and send orders to Safeguard. In this section of the CMS course you will learn about the contents, functionality and terminology surrounding orders and customers.

Contents of CMS

CMS is a database of customer and prospect information. It stores the following information:

→ Current customer orders and order history
→ Customer shipping and billing information
→ Safeguard product numbers, descriptions, and prices
→ Design forms
→ Bank information
→ User defined fields
→ Customer sales volume and figures
→ Customer accounts receivable data
→ Various sales and marketing reports
→ Limited referral source information

Introduction to CMS, cont

Functions of CMS

CMS is used to:

→ Enter, maintain, and view customer billing and shipping information
→ Enter, maintain, and view contact information
→ Enter and maintain orders
→ View detailed order history
→ View sales volume and figures
→ View up-to-date accounts receivable data
→ Track customer sales activities
→ Enter recall dates and messages to use for telemarketing and sales follow-up
→ Enter, maintain, and view product information
→ Enter, maintain, and view design forms
→ Enter and maintain bank information
→ Enter and maintain user defined fields to track customer information
→ Create and print various types of reports and logs

CMS Terminolgy

Before you begin to use CMS, you need to understand the following basic terms:

Term	Description and Comments
Contact	Refers to customers, prospects, referrals, and Distributor/Associates that are listed in the system.
Customer	A company that has already placed orders.
Prospect	A company whose business you are soliciting.
Referral	A contact that has referred a customer or prospect to you.
CSR Code	A two-digit alpha or numeric code used to track activities of office-staff other than the Distributor or Associate.
Recall Date	A future date on which you want to make contact with a customer.
Telecomm	The system that enables you to electronically exchange order and customer information with Safeguard.

Passwords and Security

Overview

Introduction	CMS is a repository of customer information for orders. To ensure security of the customer information, CMS is password protected.

Passwords   A password is a secret code used to access the system. The use of passwords is a security measure to prevent unauthorized people from accessing the system. Each CMS user in the office will be assigned a password by the CMS administrator. Upon entering CMS each time, a username and password will be required.

Safeguard CMS Security Policy:
→ Minimum password length is 6 characters and the maximum is 10.
→ Passwords expire every 60 days and can be reused after 13 months. The system will prompt an inquiry seeking a new password within 15 days of expiration.
→ New passwords cannot be identical or substantially similar to previous passwords.
→ Users are locked out after 3 unsuccessful attempts at logging in.
→ Passwords must be composed of letters and numbers and cannot be blank. Passwords can be upper or lower case. Spaces or special characters are not allowed. Passwords are case sensitive, i.e. Joe123 is not the same as JOE123
→ A local user with CMS admin privilege will have the ability to grant access to users who have been locked out.
→ DTG will have the ability to grant access to users who have been locked out.
→ Users, who have been locked out, will have to change their password in order to be able to successfully login.
→ Stored passwords are encrypted.
→ An asterisk, "*", or some other character shall hide the users password instead of displaying the actual characters typed.
→ The actual user names will not change.

Passwords and Security, cont.

Security

To ensure the integrity and accuracy of the information, CMS contains a security system that enables the CMS administrator to assign a *security level* to each user in the office. There are two types of security levels: *Administrative* and *Staff*.

Your security level determines the menu options you will be able to access. This means that if you are a staff level user, your administrator can limit your access to menu options that pertain to staff level responsibilities.

Accessing and Exiting CMS

Overview

Introduction   Before you access CMS, make sure it as been installed according to the instructions and guidelines provide by DTG [Distributor Technology Group].

When you finish using CMS, use the Exit command to exit.

How to Access CMS   Follow the steps below to access CMS:

Step	Action
1	Double-click the CMS icon located on your desktop.
2	Enter your username.
3	Click the Ok button to continue.
4	Enter your password [Keep in mind; you will be required to update this periodically.]
5	Click the Ok button to continue.

How to Exit CMS   Follow the steps below to exit CMS:

Step	Action
1	Navigate back to the home screen of CMS.
2	Click the Exit link located in the File menu.
3	When the pop-up appears asking if you want to quit CMS, click the Yes button.

Screen Layout

Overview

Introduction   The components and format of CMS screens differ depending on the selected option and function you are performing. However, most of the screens consist of the same items. Some screens appear flat and require navigation using a *keys menu* and *function key strokes*, while others represent *forms* with additional screen options listed as *tabs*, and can be easily navigated *using the mouse*.

Screen Layout   See the diagram below of a typical "flat" screen:

Screen Layout, cont

Screen Layout,cont.

See the diagram below of a typical forms screen:
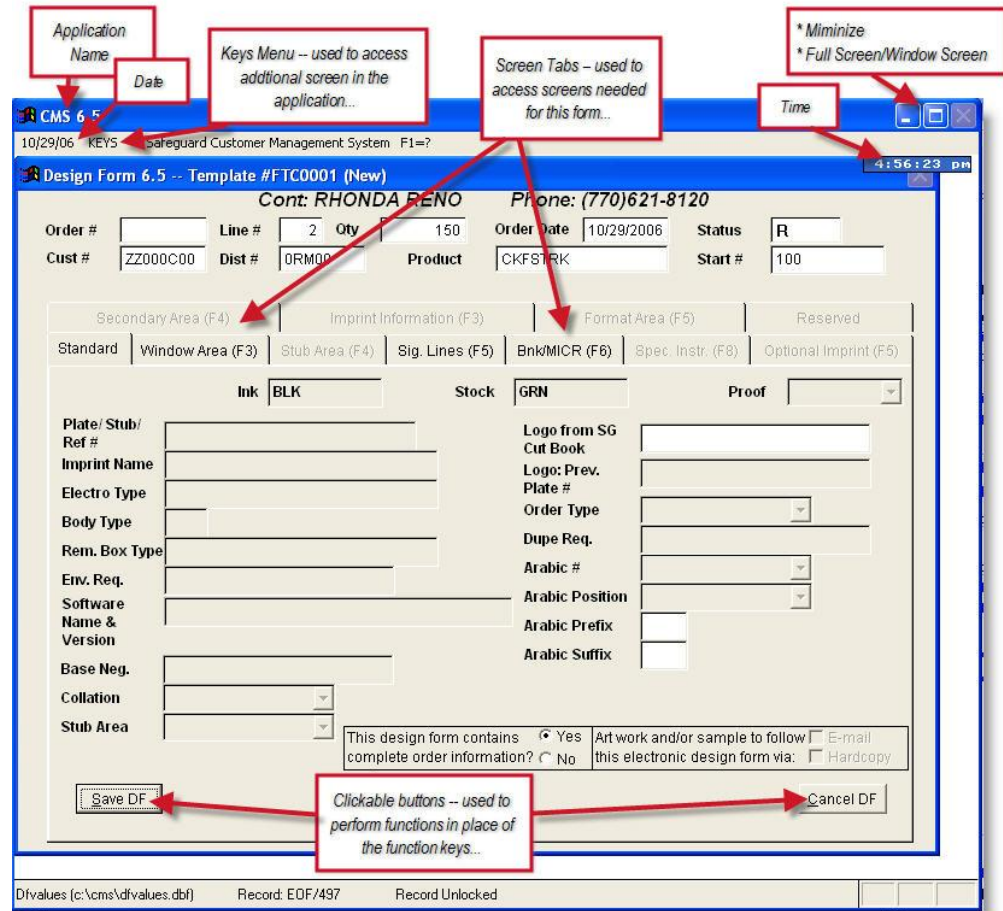
Navigating

Overview

Introduction   Navigating CMS can seem quite tricky. Not only because it's a DOS/Windows hybrid requiring the use of function key strokes combined with the use of the mouse; it also requires drilling down to access information.

In future modules you will learn about each area of CMS. In this section we'll only focus on the menu options located off the main screen.

Main Screen Menus:
→ File
→ Reports
→ Telecomm
→ Maintenance
→ Help/News
→ Utilities
→ Options

Navigation   Take a look at the different menus options based on which drop-down you select:

File	Reports	Telecomm	Maintenance	Help/News	Utilities	Options
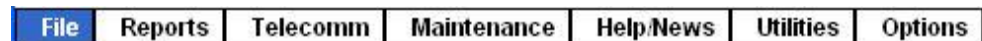
Brief Definitions:
→ *File* – start here when working with contacts and orders
→ *Reports* – start here when working with most reports
→ *Telecomm* – start here when transmitting information to and from Safeguard
→ *Maintenance* – start here when working with items like; security, defaults, etc
→ *Help/Menu* – start here when accessing CMS messages from Safeguard
→ *Utilities* – start here when working with items like; overnight maintenance, merge customer, etc
→ *Options* – start here If looking for the calendar or calculator

Navigation, cont.

Navigation, cont.

Follow the menus here:

Menu Name	Definition of options
File Menu

Sub-menu Brief Definitions:
→ *Contacts* – start here to work with contacts
→ *Products* – start here to work with and locate product codes
→ *Order History* – start here to look-up a previously placed order – using the order number to locate it
→ *Distributor P.O. History* – start here to look-up a previously placed order – using the Distributor PO number to locate it
→ *Invoices* – start here to look-up a previously placed order – using the invoice number to locate it
→ *Design Forms* – start here to preview a design form associated with a specific order number
→ *Vendors* – start here to locate sourced vendors, vendor numbers and vendor contact information
→ *Vendor Invoices* – start here to create a vendor invoice for a sourced order |

Navigation, cont.

Navigation,
cont.

Follow the menus here:

Menu Name	Definition of options
File Menu, cont	Sub-menu Brief Definitions, cont: → *Bank Database* – start here to look-up, add or edit bank MICR and bank contact information → *Letter Database* – start here to work with standard letters → *UDF Database* – start here to add or edit user defined fields → *Compatibility Guide* – start here to locate base neg numbers, competitor form numbers and software information for orders → *Marketing Program Management* – start here to work with the Safeguard Corporate predefined marketing programs
Reports Menu	 Sub-menu Brief Definitions: → *Orders & Designs* – start here to work with reports based on order information → *Sales* – start here to work with sales based reports → *Marketing* – start here to work with marketing reports → *Commissions* – start here to work with reports based on commissions → *Additional* - start here to work with reports outside the above reports like; receivables, bank lists, etc → *View Disk Reports* – start here to view a list of reports that you export to disk

Navigation, cont.

Navigation, cont.   Follow the menus here:

Menu Name	Definition of options
Telecomm Menu	Sub-menu Brief Definitions: → *Transmit to SBS* – start here to transmit order and customer information to Safeguard → *Receive from SBS* – start here to receive order and customer information from Safeguard → *Received Reports* – start here to work with reports based on information received from Safeguard like; scratchpad messages → *Logs* – start here to view log information in regards to transmitting and downloads to and from Safeguard → *Configuration*– start here to edit the telecomm user ID → *Data Re-Flag* – start here to reflag orders and customer changes for telecomm. → *Start WebEx Session* – start here to join a WebEx session typically used to allow DTG the ability to work on your CMS application remotely

Navigation, cont.

Navigation, cont.

Follow the menus here:

Menu Name	Definition of options
Maintenance Menu	 Sub-menu Brief Definitions: → *Backup* – start here to back up the CMS database, index, and memo files. (DTG recommends backing up the entire CMS directory and subdirectories to an external medium such as CD-ROM). → *Defaults* – start here to adjust CMS defaults based on your preferences → *MF Downloads* – start here to import customer, history, or product files from DTG. → *Export Customers* – start here to create an external customer file in either SDF or Delimited format. → *Update Sales* – start here to run the update sales function prior to running sales reports in CMS → *Index Maintenance* – start here reindex all database files or just a specific group of files. → *Security Levels* – start here to access, edit and create various security levels for the staff → *Marketing Scripts* – start here maintain Marketing and Cross Selling scripts.

Navigation, cont.

Navigation, cont.

Follow the menus here:

Menu Name	Definition of options
Maintenance Menu, cont.	Sub-menu Brief Definitions, cont: → *Label Alignment Test* – start here run a label alignment test. Used to ensure labels line up properly when printed → *Tax Adjustments* – start here to maintain the tax codes and percentages for each state/county. → *Automatic Recall Adjustments* – start here to maintain the number of months to calculate the recall date for the first order entered. → *CMS Error Report* – start here to print the CMS error report. → *Change Log Report* – start here to print the Change Log Report (Was used to track changes to customers and orders. No longer being used). → *Set Up Plan* – start here to maintain your forecast figures for each product line. These figures will then show on the Trended Gross Shipments report. → *Product Line Markup* - start here to adjust the markup percentage by product line
Help Menu	 Sub-menu Brief Definitions: → *Help Index* – start here to access the CMS Help menu. → *News* – start here to access CMS message sent from Safeguard → *About CMS* – start here to view the DTG Contact information. → *System Info* – start here to view information about your system.

Continued on next page

Navigation, cont.

Navigation, cont.

Follow the menus here:

Menu Name	Definition of options
Utilities Menu

Sub-menu Brief Definitions:
→ *Test CMS Database Files* – start here to see if any of the CMS database files are damaged.
→ *Repair Damaged DBF File* – start here to repair damaged CMS database files.
→ *Run Overnight Maintenance* – start here to run the Overnight Maintenance utility.
→ *Rebuild Ledger* – start here rebuild a customer's ledger or all customers ledgers.
→ *Build Alaskan Product File* – start here to markup product line 01 by 25% for Alaskan distributors only.
→ *Build Hawaiian Product File* – start here to markup product line 01 by a percentage entered. Used only for the Hawaiian distributors.
→ *Reset Telecomm Flags* – start here to remove the "T" or "Q" telecomm flag from customers or orders. This utility will cause the record not to transmit. |

Navigation, cont.

Navigation,
cont.

Follow the menus here:

Menu Name	Definition of options
Utilities Menu, cont.	Sub-menu Brief Definitions, cont: → *Change Distributor #* - start here to change the current distributor/associate number that you enter to the new distributor/associate number that you enter. → *Delete Distributor #* - start here to delete customers and orders for the distributor number you enter. → *Archive CMS Data* – start here to archive and/or delete CMS data for a specific date range. → *Change Area Code* – start here to instantly change the area code on different telephone exchanges → *Reset Mailer Flag* – start here to change the ARR flag for all customers or for all customer for a specific distributor/associate. → *Order Recall Calculation* – start here to recalculate the order recall for a customer that has a least two orders with the same product. → *Clear Order/DF Print Flags* – start here to clear the order and design form print flags. This utility will remove orders/design forms from the print queue. → *Delete Purged Customers* – start here to run the delete purged customers process → *Merge Two Customers* – start here to merge to customer records together → *Undelete a Customer or Order* – start here to undelete a customer or order, only available prior to running overnight maintenance → *Create Blank Database File* – start here to create a blank database file. This utility will remove all data from the specified file chosen. This utility is normally run with the assistance of a DTG representative when a file is beyond repair and a new one must be created.

Navigation, cont.

Navigation, cont.

Follow the menus here:

Menu Name	Definition of options
Options Menu	 Sub-menu Brief Definitions: → *Help* – start here to access the CMS help menu. → *Calculator* – start here when using the built-in calculator → *Calendar* – start here when using the built-in calendar