SalesCTRL

Customer Relationship Management Software

SalesCTRL™ – TRAVERSE® HotLink Setup Guide

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An Overview of the TRAVERSE HotLink

The TRAVERSE HotLink allows you to inquire on customer, order, and inventory information, setup new customers on-the-fly, enter sales orders and quotes, email/print quotes and order acknowledgements, and generate custom reports using data from SalesCTRL and TRAVERSE.

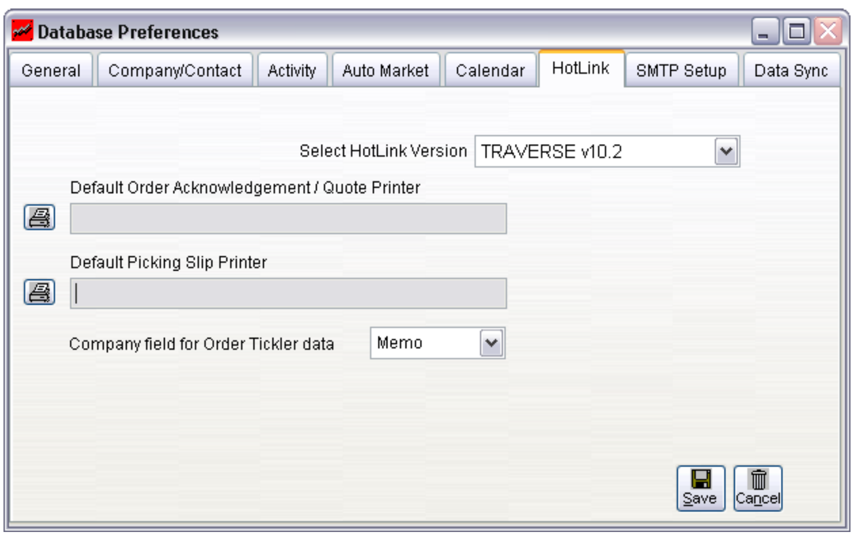
The TRAVERSE HotLink includes Customer Inquiry, Sales Order Entry and Inventory Inquiry processing functions along with standard and custom reporting. The Customer Inquiry displays account balances, open orders, detail history, invoice history and open invoices as well as sales summary figures. Order Entry allows for the entry of TRAVERSE Sales Orders and Quotes directly from the SalesCTRL contact screen. Inventory Inquiry displays inventory information including on hand, committed, in use and backordered quantities for each inventory item. All inquiries may be printed, emailed or sent to a spreadsheet.

TRAVERSE HotLink Setup

1. Install the SalesCTRL™ CD locally or on the network

2. Log into SalesCTRL with the login ADM with no password.

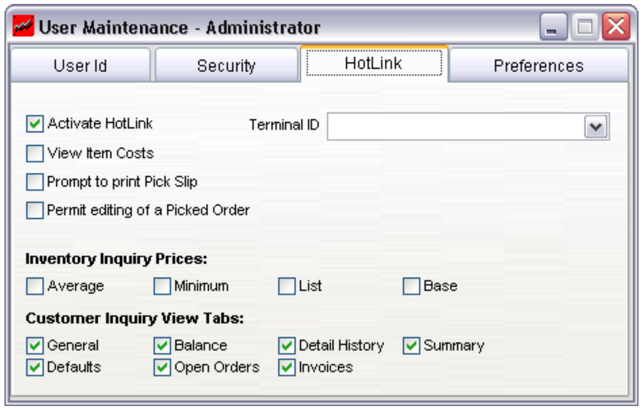
3. Close the Company/Contact form and go to Admin, Database Menu, Database Preferences, HotLink tab.



4. Select TRAVERSE v10.2 from the pull down menu, specify a default order acknowledgement and picking slip printer, specify a SalesCTRL memo field to use for company notes, and click on Save to save and exit the screen.

5. Close SalesCTRL and log in again with ADM.

6. Go to Admin, System Security, User Maintenance, click on Add, select ADM or other login to provide HotLink access, and click on the HotLink tab.



Mark the "Activate HotLink" checkbox. Mark the following checkboxes for this user as required:

- View Item Costs – Allows the user to view item costs in Inventory Inquiry
- Prompt to Pick Slip – Prompts the user to print a picking slip when printing the Order Acknowledgement.
- Permit editing of a Picked Order – Allows orders with the status of "Picked" to be edited.
- Inventory Inquiry Prices: Average, Minimum, List and Base - Determines what pricing structure(s) are displayed for this user in the HotLink Inventory Inquiry.
- Customer Inquiry View Tabs: General, Balance, Detail History, Summary, Defaults, Open Orders, and Invoices – Determines what tabs are displayed for this user in the HotLink Customer Imquiry.

7. Close SalesCTRL and log in using ADM.

8. On the SalesCTRL Toolbar (for each workstation to access HotLink) go to HotLink, ODBC Driver Setup and the following screen displays:

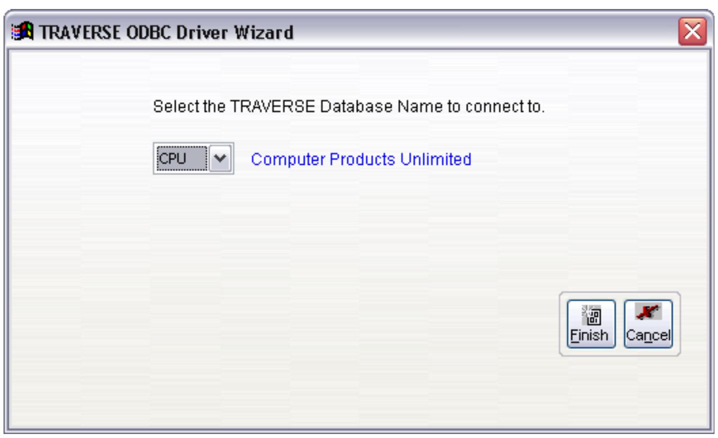
Select the TRAVERSE SQL Server Name - Enter the server name where TRAVERSE was installed

Use NT authentication – Mark this box if using NT Authentication

User ID - Enter the TRAVERSE user information

Password – Enter the TRAVERSE password information

Click on Next, and the following screen displays:



9. Select a TRAVERSE database and Finish to complete the ODBC driver installation.

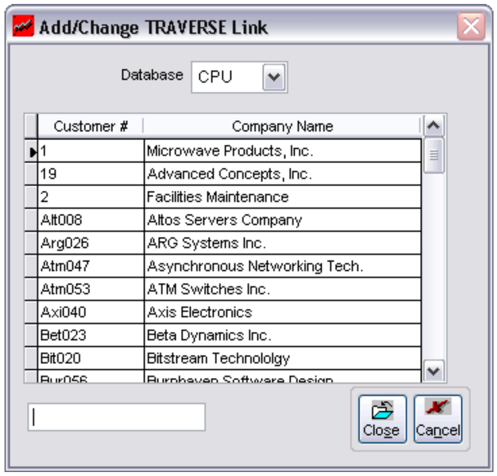
10. Complete steps 6 through 9 for each workstation / user with HotLink access.

Linking TRAVERSE and SalesCTRL records

A link between SalesCTRL and TRAVERSE records may be established individually or as a group.

Performing Individual Links

To link the accounts individually, log into SalesCTRL, select a company for which to form a link, and select HotLink, Link to Current Company. A screen similar to the one shown below displays:

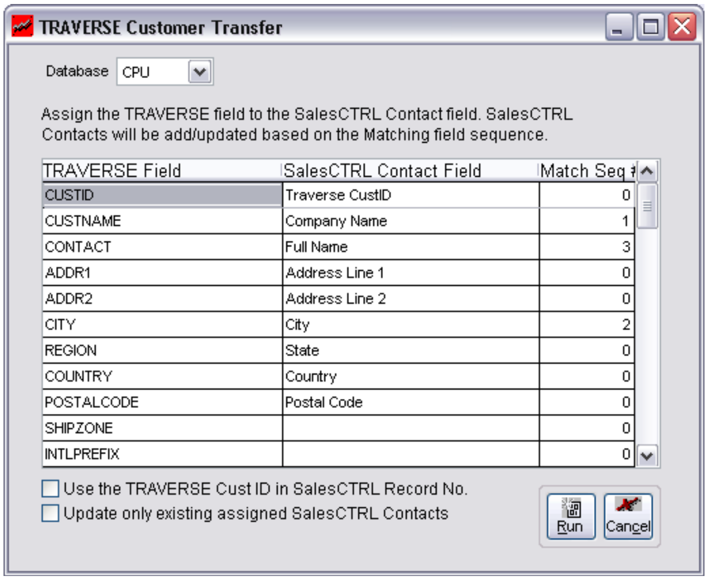


Select the TRAVERSE database and customer # and select Close. From the SalesCTRL company tab, click on the Dates icon to display the Company System Fields sub-screen:

Note that the HotLink CustID has been populated with the TRAVERSE record number and the HotLink Data with the TRAVERSE database name. This information provides a link between the TRAVERSE and SalesCTRL records for HotLink Order Entry and Inquiries.

Performing a Group Link / Populating SalesCTRL with TRAVERSE records

Select HotLink, TRAVERSE Transfer to SalesCTRL, and a screen displays, similar to the one below:



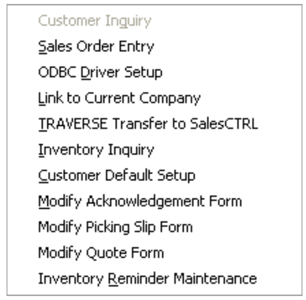
For each TRAVERSE field, a corresponding SalesCTRL field must be specified. This establishes where data is pulled from and where it is populated.

- Use the TRAVERSE Cust ID in SalesCTRL Record No. – Creates new SalesCTRL records with the same record number as TRAVERSE.
- Update only existing assigned SalesCTRL Contacts – Updates existing SalesCTRL records with new TRAVERSE information.

When the field assignment is complete select Run. This utility populates the SalesCTRL database with TRAVERSE records and establishes a link.

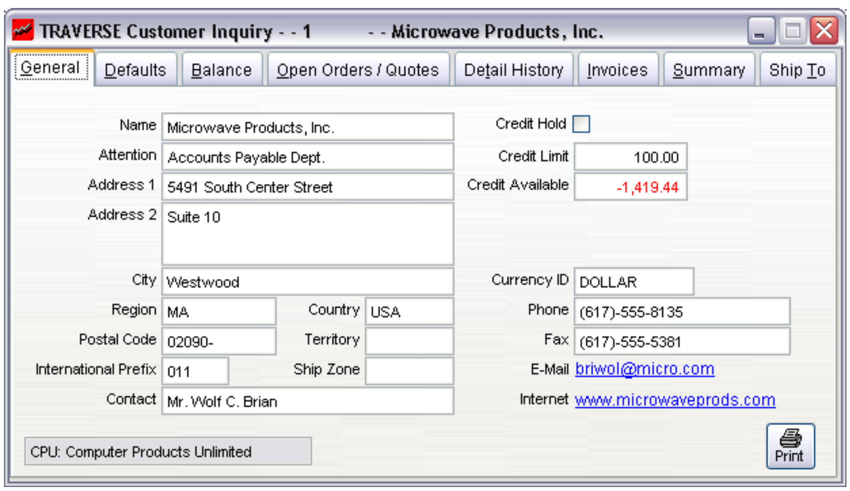
Customer Inquiry

Select a SalesCTRL record and click on HotLink from the SalesCTRL menu bar at the top of the screen. If the SalesCTRL record is not linked to a TRAVERSE record, the Customer Inquiry icon displays as grey, indicating that a link does not exist.



A link may be established through the “Link to Current Company” or “Sales Order Entry” menu selections. Review the **Linking TRAVERSE and SalesCTRL records** and **Sales Order Entry** sections of this document for detailed instructions on establishing a link.

For SalesCTRL records with a link to a TRAVERSE record, a screen similar to the following displays:



The Customer Inquiry displays:

- General Information
- Company Defaults
- Account Balances
- Open Orders
- Detail History
- Invoice History
- Open Invoices
- Sales Summary Figures
- Ship to Information

Sales Order and Quote Processing

Access a SalesCTRL record and select HotLink, Sales Order Entry. If a link between the SalesCTRL and TRAVERSE record does not exist, the "TRAVERSE Add New Customer" displays. This screen is populated with a combination of data from SalesCTRL and Customer Default Setup.

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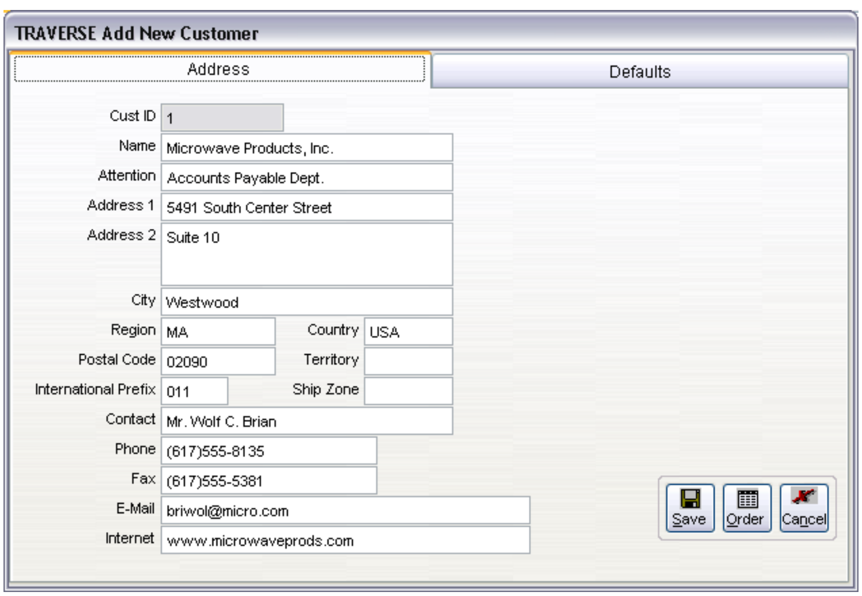
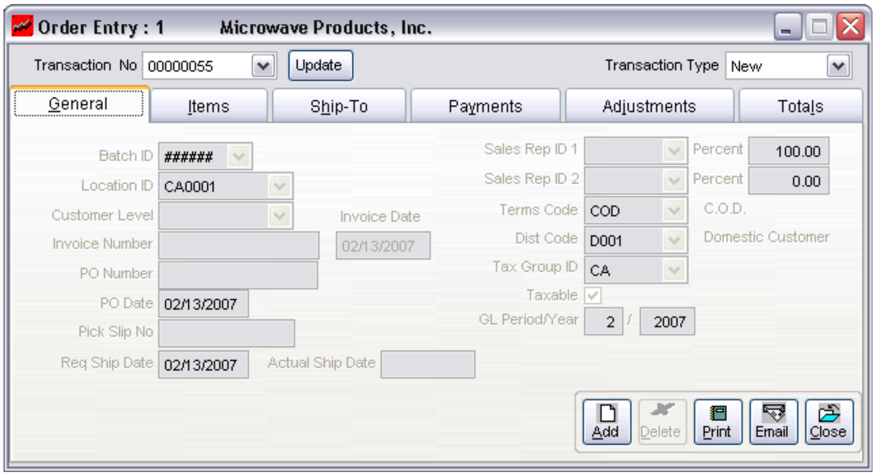


Click on Cancel to end this session and manually establish a link or on Order to add the SalesCTRL record to TRAVERSE and continue with Order Entry. The following screen displays:



The first time HotLink, Sales Order Entry is selected after adding a SalesCTRL record to TRAVERSE, you are taken directly into Add mode.

Orders / Quotes and Credits:

- New orders are entered with Add.
- New quotes are entered by selecting Add and changing the Transaction Type to Price Quote.
- Credits are entered by selecting Add and changing the Transaction Type to Credit.
- Existing orders, quotes, and credits are viewed by selecting the Transaction No from the pull down menu.
- Existing orders, quotes, and credits are edited by selecting the Transaction No from the pull down menu and clicking on Update.
- Existing and new orders, quotes and credits are printed by selecting Print.
- Existing and new orders, quotes and credits are e-mailed by selecting Email.
- Existing and new orders, quotes and credits are deleted by selecting Delete.

STOP The order acknowledgement printer defaults to the “Default Order Acknowledgement / Quote Printer:” specified in Admin, Database Menu, Database Preferences, HotLink tab.

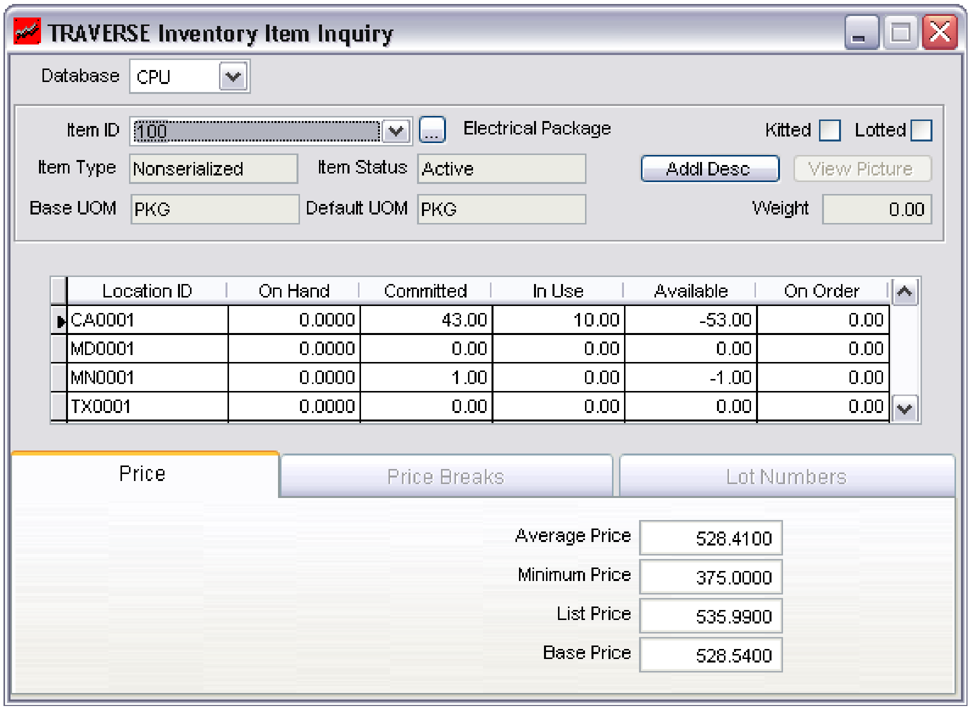
Picking Slips

Picking slips may also be printed by selecting Print from the Sales Order Entry screen if the “Prompt to Print Pick Slip” is marked in Admin, System Security, User Maintenance:

- The picking slips are numbered starting with the number specified in Admin, Database Menu, Database Preferences, “Starting Picking Slip #”.
- The picking slip printer defaults from “Default Picking Slip Printer” in Admin, Database Menu, Database Preferences.

Inventory Inquiry

From the HotLink menu, select Inventory Inquiry.



Select an inventory item from the "Item ID" pull-down or click on the "…" icon to the right of the pull-down to select an inventory item by description. To access Additional Descriptions, click on the "Addl Desc" icon to the right of the "Item Status" field.

Inventory Inquiry displays inventory information including on hand, committed, and in use quantities for each inventory item.

Price Tab

Price information is controlled by checkboxes set by user in the Admin, System Security, User maintenance, HotLink tab. Please see the **TRAVERSE HotLink Setup** section for more information.

Price Breaks Tab

If Price Breaks were designated when the inventory item was entered in TRAVERSE, the Price Breaks tab is available and you may click on the tab to display the corresponding information.

Lot Numbers Tab

If the inventory item is a lotted item, the Lot Numbers tab is available and you may click on the tab to display the corresponding information.