

**Basic Procedures for
Finding PGO Information**

eFrontOffice: Front Desk Basics

August 23, 2001

eFrontOffice: Front Desk Basics—Basic Procedures for Finding PGO Information

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EFRONTOFFICE: FRONT DESK BASICS

- What is eFO?
- Starting eFO
- Navigating eFO
- Finding Records
- Viewing Records
- Assigning Salespeople
- Salespeople List

This guide presents basic procedures for:

- Finding a customer in eFrontOffice.
- Finding the salesperson associated with a customer.
- Assigning a salesperson to a caller by organization SIC code.

A list of salespeople by SIC code is located on page 11.

■ What is eFrontOffice?

eFrontOffice is a powerful tool that ensures well-rounded management of existing and potential customers, customer-focused products and services, and effective communication between CompX departments. eFrontOffice uses three classes of primary data: **person**, **group**, and **organization**.

- **Person** is the individual that you deal with.
- **Group** is a subsection, department, or entity that requires specific attention within a larger organization.
- **Organization** is the main record of any given firm. A small company may only have an organization record.

The PGO is the backbone of the Epicor system. It contains all the information related to CompX's *contacts* and *customers*. In Epicor, a PGO is any entity listed in the CompX corporate database. In this guide, the terms "PGO" and "customer" will be used interchangeably.

You will be accessing a PGO record to find the salesperson assigned to a customer. If a PGO has an assigned salesperson, then that information will be listed in a PGO's sales call record or organization record.

In general, you will:

1. Receive a call from a customer who does not know who their salesperson is.
2. Find the PGO in eFrontOffice.
3. Open and search the customer record.
4. View the salesperson, or note the SIC code of the organization and cross-reference this number against an external list of salespeople by SIC code.

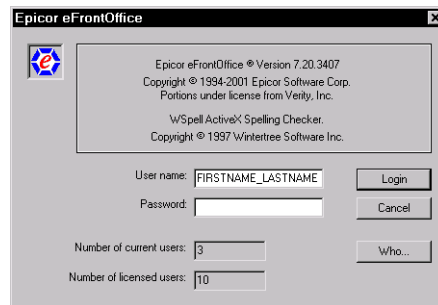
Direct the caller accordingly. If you are unsure who to assign the caller to, or if your search is taking too long, then direct the caller to an Internal Sales Representative as listed in "Salespeople by SIC Code" on page 11.

■ Starting eFrontOffice

You need your CompX network user ID to log into eFrontOffice.


▼ To start eFrontOffice

1. From the Windows **Start** menu, select **Programs > Epicor > eFrontOffice**, or double-click the eFrontOffice icon on your desktop. The Login form appears.



2. In the **User name** field, enter your CompX network user ID (FIRSTNAME_LASTNAME).
3. If logging into eFrontOffice for the first time, leave the **Password** field blank. After the program has loaded, you should set-up a password as outlined in “To set-up your eFrontOffice password” on page 3.
4. Click [**Login**].



Tip: Since eFrontOffice takes quite a while to load, it is a good idea to have the program already open and running when a customer calls. To minimize eFrontOffice without closing it, click the  in the top right hand corner of the eFrontOffice program window.

▼ To set-up your eFrontOffice password

1. From the eFrontOffice menu, click [**Tools**] and select **Change Password**. The Change Password form appears.

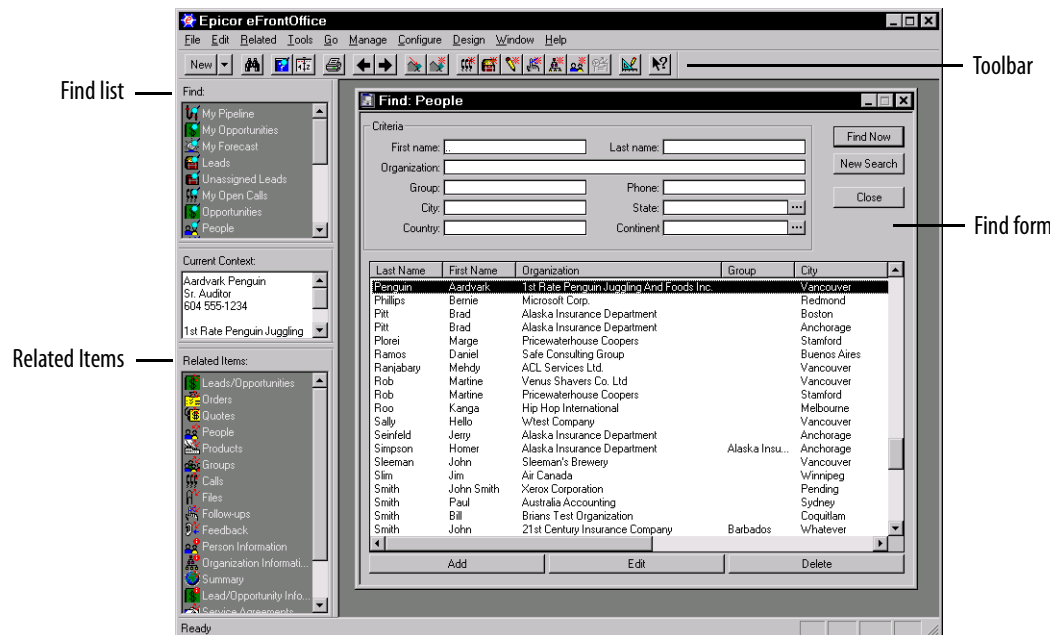



❑ Make up your own eFO password.

2. Leave the **Old** field blank. If this is the first time that you have set up a password, then enter your new password into the **New** field.
3. Click [**OK**]. A pop-up alert confirms the password change. Click [**OK**] to clear the alert.

■ Finding Your Way Around eFrontOffice


The eFrontOffice interface allows you to quickly find the customer information that you need. In particular, you will use the toolbar, Find list, and Related Items sections of the interface in your searches.



- **Find list** – This is a list of shortcuts to various Find forms. You will use the Organizations shortcut in the Find list.
- **Related Items** – This list allows you to look up options associated with a selected PGO. You will use this list to access a PGO call record or an organization record associated with a person or group.
- **Toolbar** – The toolbar provides you with the binoculars  (Main Search) shortcut to the Find: People form, where you can conduct a search for a person or group.
- **Find form** – Use the PGO Find forms to look up customer records.

■ Finding Customer Records

In eFrontOffice, customer records can be accessed by two methods:

1. Using the Organizations shortcut in the Find list.
2. Using the binoculars  (Main Search) button on the toolbar.

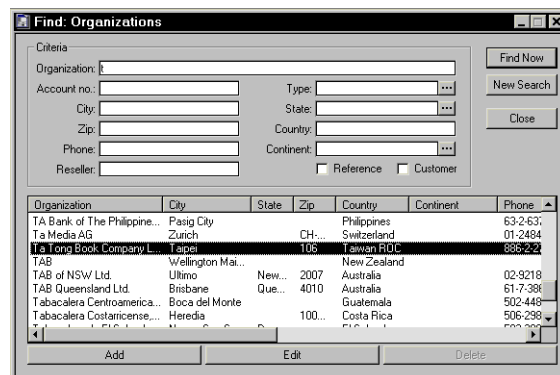
It is easiest to use the Find: Organizations form for your searches. You can also do a search for a person or group.

Using the Find: Organizations Form

Try to do customer searches by organization name. If the customer does not know what organization they are associated with, then conduct a search for a person or group as outlined in “Using the Find: People Form” on page 5.

▼ To use the Find: Organizations form

1. From the **Find** list, select **Organizations**. The Find: Organizations form appears.
2. Enter your search criteria into the **Organization** field and click [**Find Now**].



Organization	City	State	Zip	Country	Continent	Phone
TA Bank of The Philippine...	Pasig City			Philippines		63-2-631...
Ta Media AG	Zurich	CH...		Switzerland		01-2494...
Ta Tong Book Company L.	Taipei		106	Taiwan ROC		886-2-2...
TAB	Wellington Mai...			New Zealand		
TAB of NSW Ltd	Ultimo	New...	2007	Australia		02-9218...
TAB Queensland Ltd	Brisbane	Que...	4010	Australia		61-7-38...
Tabacalera Centroamerica...	Boca del Monte			Guatemala		502-448...
Tabacalera Costarricense...	Heredia		100...	Costa Rica		506-298...
Tabacalera F&C	Managua			Nicaragua		505-222...



Note: You can search by entering partial characters, or wildcards, into the search field. For example, entering “t” in the Organization field will bring up all organization records starting with a “t”.


3. When the customer record appears, highlight the listing.

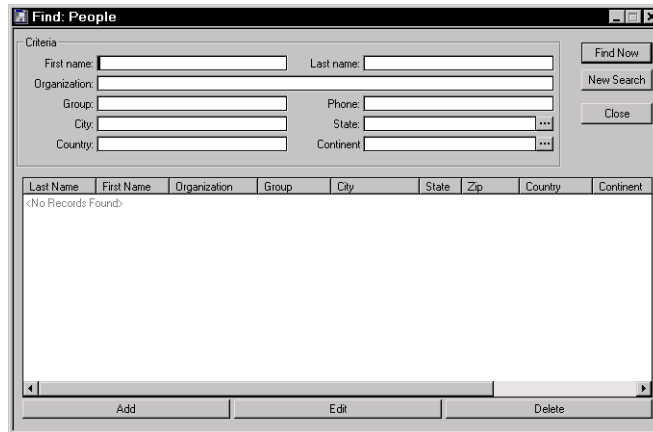
For the next step in the process, see “Viewing Customer Records” on page 7.

Using the Find: People Form

Use the Find: People form to access a call record or organization record through a person or group associated with an organization.

▼ **To use the Find: People form**

1. Click the binoculars  (Main Search) on the eFrontOffice toolbar, or select **People** from the **Find** list. The Find: People form appears.



Last Name	First Name	Organization	Group	City	State	Zip	Country	Continent
<No Records Found>								

2. Search PGO records as follows:
 - By **Person** – Enter your search criteria into the **Last Name** and/or **First Name** fields.
 - By **Group** – Enter the group name into the **Group** field.
 - By other fields – You can also search by phone number, city, country, and continent.



Note: You can search by entering partial characters, or wildcards, into the search field. For example, entering “t” in the Group field will bring up all group records starting with a “t”.

3. Enter your chosen search criteria into the appropriate field and click **[Find Now]**.
4. When the customer record appears, highlight the listing.

For the next step in the process, see “Viewing Customer Records” on page 7.

■ Viewing Customer Records

Once you have found the PGO in eFrontOffice, you can view the salesperson associated with the customer by one of three methods:

- If CompX has contacted the customer in the past, then a record of the communication will exist in the Calls form associated with the PGO record. When a customer calls, try this method first.
- The salesperson information may be listed in the [Territories] tab of the Organization Information form.
- If a salesperson is not listed in the Calls form or the [Territories] tab, then get the organization's SIC code from the [Business] tab of the Organization Information form.

Viewing a Salesperson from a Calls Form

When CompX contacts a PGO, a record of the communication is recorded as a sales call. The salesperson who made the call is listed in a Calls form associated with the PGO record.

▼ To view a salesperson from a Calls form

1. Find and select the customer record as outlined in “Finding Customer Records” on page 5.

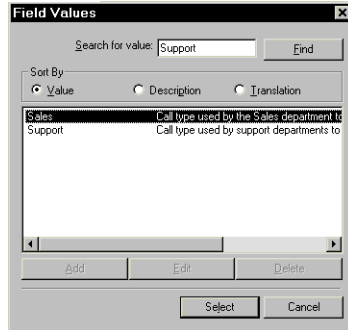


Note: Keep the Find form listing the customer record open. You will need it if you have to use the next method.

2. From the **Related Items** list, select **Calls**. The Calls form appears.

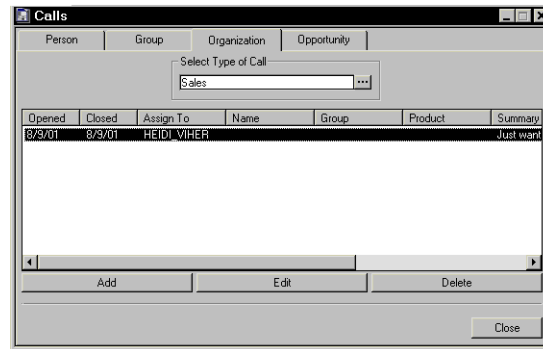
Opened	Closed	Assign To	Name	Group	Product	Summary
<No Records Found>						

3. If “Sales” does not default in the **Select Type of Call** field, then click  to the right of the field. The Field Values form appears.



The Field Values dialog box has a search field with 'Support' and a 'Find' button. Below are radio buttons for 'Value', 'Description', and 'Translation'. A list shows 'Sales' (Call type used by the Sales department to) and 'Support' (Call type used by support departments to). At the bottom are 'Add', 'Edit', 'Delete', 'Select', and 'Cancel' buttons.

4. Select “Sales” by double-clicking the listing or by highlighting the listing and clicking [Select]. The Calls form now lists any sales calls made to the PGO.



The Calls form has tabs for Person, Group, Organization, and Opportunity. A 'Select Type of Call' dropdown shows 'Sales'. Below is a table with columns: Opened, Closed, Assign To, Name, Group, Product, Summary. One row is visible: 8/3/01, 8/3/01, HEIDI VIHER, Just want. At the bottom are 'Add', 'Edit', 'Delete', and 'Close' buttons.

Opened	Closed	Assign To	Name	Group	Product	Summary
8/3/01	8/3/01	HEIDI VIHER				Just want

5. If you opened the Calls form from a person or group record, then click the [Organization] tab to see if it contains sales call listings.
 - **If the Calls form contains listings:**

The salesperson is listed in the **Assign to** column of the Calls form. Direct the caller to this person. If that person is not available, direct the caller to the salesperson’s assigned Internal Sales Representative as listed in “Salespeople by SIC Code” on page 11.
 - **If the Calls form is empty:**

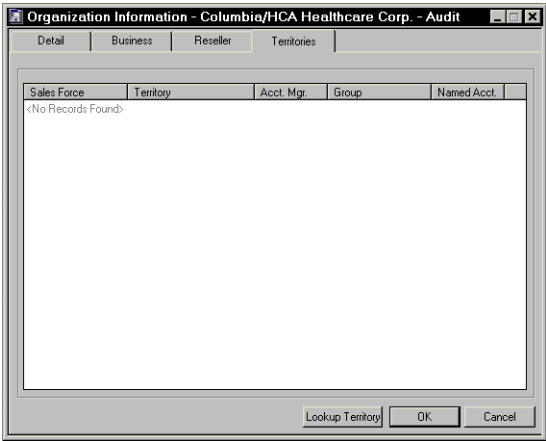
Close the Calls form. Using the Find form from “Finding Customer Records” on page 5, open the organization record for the PGO as outlined in “Viewing a Salesperson from an Organization Information Form” on page 8.

Viewing a Salesperson from an Organization Information Form

If a customer has completed an order with CompX, then the salesperson associated with the order may be listed in the [Territories] tab of the Organization Information form.

▼ **To view a salesperson from an Organization Information form**

1. Open the organization record for a PGO as follows:
 - From the Find: Organization form, double-click the customer listing or highlight the listing and click [**Edit**]. The Organization Information form appears.
 - From the Find: People form, highlight the customer listing. Select **Organization Information** from the **Related Items** list. The Organization Information form appears.
2. Click the [**Territories**] tab of the Organization Information form.



- **If the [Territories] tab contains listings:**

The salesperson is listed in the **Acct. Mgr.** column of the [**Territories**] tab. Direct the caller to this person. If that person is not available, direct the caller to the salesperson's assigned Internal Sales Representative as listed in "Salespeople by SIC Code" on page 11.
- **If the [Territories] tab is empty:**

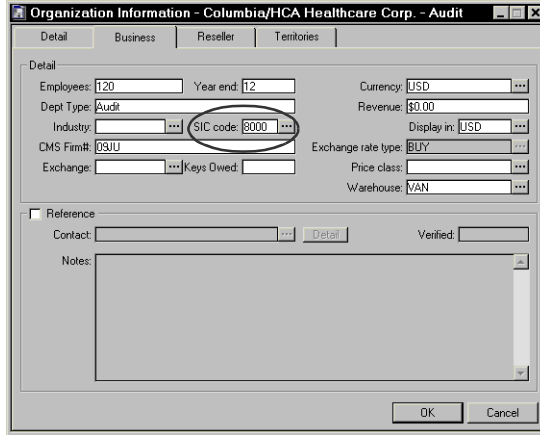
Use the Organization Information form to obtain the SIC code for the PGO as outlined in "Assigning a Salesperson by SIC Code" on page 9.

Assigning a Salesperson by SIC Code

If a salesperson is not listed in the Calls form or the [Territories] tab, then cross reference the PGO's SIC code with the list "Salespeople by SIC Code" on page 11.

▼ **To assign a salesperson by SIC code**

1. Click the **[Business]** tab of the Organization Information form.



2. Note the SIC code for the PGO, and cross-reference it against the list "Salespeople by SIC Code" on page 11. Direct the PGO caller to the appropriate salesperson. If that person is not available, direct the caller to the salesperson's assigned Internal Sales Representative.

■ Salespeople by SIC Code

Use the SIC code obtained in “To assign a salesperson by SIC code” on page 10 to find a salesperson for the PGO caller. If the salesperson is not available, direct the caller to the salesperson’s assigned Internal Sales Representative.

SIC	Salesperson	Phone	Internal Sales Rep.
1-2	Sample Salesperson	4274*	Sample ISP (3279**)

(In the original document,
this list was 1-1/2 pages
long)

eFrontOffice: Front Desk Basics
Salespeople by SIC Code

