



# Customer Service Front End

This software was developed through consultation with our customers and sales staff. As customers are continuously increasing their requests for information, our objective was to improve the level of customer service by providing the sales force with instant access to information. This software uses a "customer profile" as its launch point for Customer Service Reps to access information. It virtually merges databases so that all customer data can be accessed from one single starting point.

## Accessible Information

- Active & Archived Orders
- Active & Archived Quotes with Follow-up Messaging Quote, Job, Invoice
- Sales of Last 12 months
- List of Jobs by End Users
- A/R Aging Inquiry
- A/R History by Period
- Job History
- Existing Order Entry and Estimating Reports
- Sales by Month
- Customer Complaint Records
- Activity Notes

## Inquiries

- Current Aging & Shipping Status
- Order Production Status
- Customer Requested Acknowledgment Information
- Job Chain

## Options

- Hit Ratios of Quotes to Orders
- Fax Memo
- E-mail
- Trip Report
- Scheduling Dept. relay messaging

**Demo - Customer Service**

Account Number: 22982    Sort Name: AAI Auto Printers    Phone: 215 0123456

Customer Name/Address: AAI Auto Printers, 4906 Smith Street NW, Hershey PA 19044

Contact: Lori J. Brighton    Salesperson: Mark Twain    Fax: 1 215 0123456

Customer Status: Active    Order Ack: P    Invoices: P    Packing Slip: P    Quotes: P    Order Status: P

Date First Sale: 02-28-99    Date Last Sale: 12-10-99    Date Last Payment: 08-19-99

Credit Terms: Ship All    Credit Warning: CREDIT LIMIT \$5000-CK W/SUPERV

	QTD	YTD	History
Number of Sales:	1	1	2
Average Pay Days:	8	8	19
Number of Credits:			
Number of Quotes:			
Hit Ratio:			
Sales \$ YTD:			
Sales \$ LYTD:			

Trip Report

**Demo - Customer Service - [Active Quote Inquiry]**

Bill-To: 22982    Customer Sort: AAI Auto Printers

Quote Number	Quote Number Suffix	Quantity A	Overall Width	Overall Length	Form Name	Date Quoted	Repeat Job Number	Repeat Job Year	Repeat Job Month	Number of Parts	Prod. Code	New Job Number	Quantity B	Quantity C
1967		1	10000	9-1/2	11	03-19-02				4	Tradmulti		50000	100000
821	2	2	15000	8-1/2	11	03-19-02				4	Tradmulti		25000	50000
821	3	3	15000	9-1/2	11	09-20-01	821198			4	Tradmulti		25000	50000
1899	1	1	10000	8-1/2	11-3/4	03-14-01				4	Unit Set		20000	50000
1909	1	1	10000	9-1/2	11	02-14-01				4	Tradmulti		20000	50000
1909	2	1	10000	9-1/2	11	02-14-01				4	Tradmulti		20000	50000
1923	1	1	10000	9-1/2	11	12-24-00				4	Tradmulti		20000	25000
1848	1	1	5000	8-1/2	11-5/8	11-07-00				4	Unit Set		50000	100000
1846	1	1	5000	9-1/2	11	11-07-00				3			10000	50000
1847	1	1	10000	8-1/2	11	11-07-00				2	Tradmulti		20000	30000
1841	1	1	10000	8-1/2	11	11-06-00				2	Tradmulti		20000	30000
1761	1	1	10000	8-1/2	11	05-05-00				2	Tradmulti			
43211	1	1	10000	9-1/2	14	03-03-99				3	Tradmulti			
42270	1	1	250000	8-1/2	11	02-19-99				1	Cut Sheet		500000	1000000
42360	1	1	30000	9-1/2	11	02-18-99				5	Tradmulti			

**Demo - Customer Service**

Job No: 8769    Job No: 8770    Job No: 8771

Archive Order Inquiry

Bill-To: 22982    Ship To:

Customer Sort: AAI Auto Printers, 4906 Smith Street NW, Hershey PA 19044

Job Number	Order Quantity	Date Entered	Number Of Parts	Product Code	Ship Date	Next Job Number	Total Quantity Shipped	Invoice Number	Sell Price	Item Description	Form Name	Ship
8769	10000	07-19-99	3	US	08-25-99		10000	19532	56.42	M ENCOUNTER FORM	DREXEL HILL KID'S F	
8770	5000	07-19-99	3	US	08-24-99	1990	5000	19488	56.42	M ENCOUNTER FORM	KID'S F	
8771	10000	07-19-99	3	US	08-25-99	1	11000	19543	56.42	M ENCOUNTER FORM	BROOKMALL KID'S F	

Archive Inquiry

Job Number: 8769    Account Number: 22982    Ship To: KID'S FIRST DE

P.O. #: 14396    Job Number: 8769

Date Shipped: 08-25-99    Show Order

**Demo - Customer Service**

Active Orders

Account Number: 22982    Phone Number: 1 215 0123456

AAI Auto Printers, 4906 Smith Street NW, Hershey PA 19044

Job Number	Ship To Name	Entered Date	Scheduled Ship Date	Form Name 1	Number of Parts	Order Quantity	Total Quantity Shipped	Product Code	Invoice Number	Sell Price	Previous Job
821990	AAI Auto Printers	10-20-02	10-20-02	Auto Form	4	25000		TM		77.93	
821299	AAI Auto Printers	07-08-02	07-09-02	Auto Form	4	50000		TM		71.48	82101
821198	AAI Auto Printers	08-07-02	09-07-02	Auto Form	4	15000		TM		93.54	
123456	AAI AUTOMATION	11-07-00	11-21-00		2	100000		TM		23.00	
111222	AAI AUTOMATION	08-04-02	09-23-02		1	25000		TM		312.30	
110501	AAI AUTOMATION	11-05-01	11-08-01	Form 110501	4	50000		TM		13.00	
88877	AAI AUTO	03-29-00	03-31-00		2	10000		TM		30.00	1144
82113	AAI AUTOMATION	03-19-02	03-25-02	Auto Form	4	25000		TM		77.93	
82109	AAI AUTO	07-17-02		Auto Form	4			TM			82101
82104	AAI AUTOMATION	03-23-99		Auto Form	4			TM			82101
82103	AAI AUTOMATION	01-03-02	10-01-02	Auto Form	4	50000		TM		93.54	82101
82102	AAI AUTOMATION	09-03-02	09-09-02	Auto Form	4	50000		TM		45.83	82101

### Drill Down

Extensive detailed information is at your fingertips. While viewing a list of open quotes, view the actual quote by double-clicking on the quote number. If the quote needs updating, you can immediately make and calculate the changes. In the same way, drill down to specific invoices and fax a copy, or drill down to specific order status information.

### Drag & Drop Inquiry Building

Using ODBC & SQL, every user has Drag & Drop inquiry building capabilities. Ad-hoc inquiries, customizing the look and feel of the inquiry window, re-arranging columns, and sorting output into your own order are all facilitated with Plantrol's Inquiry Builder. Just drag, drop & view!

### Personalized Views

Users can display line items in a spreadsheet like grid that will grow scroll bars horizontally and vertically as needed. The user can also choose to freeze columns by selecting the "Lock at Left" option. Column width and row height can be modified to the user's preferences, as well as fonts, colors and heading. By applying SQL filtering, a user can modify grid criteria to filter the rows returned in a grid and view only what he wishes.

### Windows® Functionality

Plantrol's Visual Customer Service provides complete Windows functionality. With the capability to view multiple documents and Windows® at one time, your Customer Service Reps have immediate access to information without interruption. Forms can be resized and viewed side by side. All controls and fonts on the forms will be resized to maintain aspect ratio...no cropping!

# Customer Service Front End

**Invoice Inquiry**

Batch: 9902, Period: 8753, Inv. Date: 02-28-99, Freight Terms: , F.O.B: , Ship Via:

Bill To: 22982

AAI Auto Printers  
4906 Smith Street NW  
Hershey PA 19044

Net Amount: 451.14  
Other Charges: 36.00  
Sales Tax:   
Advance Applied:   
Invoice Total: 487.14

Viewing: 8/5/1999 9:12:03 AM, 8/18/1999 1:58:54 PM, Record: 511

**Job Chain Inquiry - Job Found in Active Orders**

Job No.: 82101, Account No.: 22982, Dist P.O.: 125690, Prod Code: Auto Form, Form Name: TM

Prk#	Job Number	Account	Product	Form Name	Date Shipped	Qty Shipped	Dist P.O.
J	82109	22982	TM	Auto Form	12:00:00 AM	0	
J	82101**	22982	TM	Auto Form	12:00:00 AM	0	125690

Status Inquiry - Job Number 82101

Job Number: 82101, Dist. Code: 22982, Received: 08-22-02, Entered: 08-22-02, Distributor Name: AAI Auto Printers, Customer Name: AA AUTO, Order Type: N, Scheduled Ship Date: 08-15-02, Requested Ship Date: 08-15-02, Paper: , Carton: , Label: , Klnstk: , Ink: , Quote #: 821, 1, Product Code: TM, Ship Date: 08-15-02

**End User Sales Report**

Account Number: 22982, Period From: 9501 To: 0201, Refresh

AAI Auto Printers  
4906 Smith Street NW  
Hershey PA 19044

Credit Terms: Ship All, Credit Limit: 5000, Telephone: 215 0123456

Period	Billed Date	Job Number	Distributor P.O.	End User Name	Description 1	Item Number	Number of Piles	Quantity Billed	Unit Price	Invoice Amount	Invoice Number
9902	02-25-99	2841	40393							451.14	8753

SQL Filter Criteria:

Open Paren	Field	Operator	Value	Close Paren	AND / OR
	STAT	=	0		AND / OR
	SOLDTO	=	22982		AND / OR
	BILLTO	=	22982		AND / OR
	PERIOD_S	>=	9501		AND / OR

ORDER BY: DATE\_S ASCENDING

**Net Sales - 12 Months**

Account Number: 22982, Period From: 9501 To: 9904, Refresh

AAI Auto Printers  
4906 Smith Street NW  
Hershey PA 19044

Credit Terms: Ship All, Credit Limit: 5000, Telephone: 215 0123456

Period	Net Sales
9903	
9902	451.14
9812	1845.27
9811	1997.98
9810	1476.76
9809	747.31
9808	730.80
9807	763.63
9806	691.94
9805	536.27
9804	416.46
9803	2399.63
9802	1921.31
9801	1496.43
9712	15393.00
	\$47,005.23

Customer History by Period:

Bill To: 22982, Sold To: 22982, Period: 9902, Bill To: 22982, Period: 9902

End of Month Balance: -487.14, Gross Margin:   
Net Sales: 451.14, Percent:   
Returns and Adjustments:   
Cash Discounts Taken:   
Cost of Goods Sold: 837.76  
Standard Cost:   
Other Charges:   
Freight Charges:   
Aging:   
Current: 31.45  
46.60