Table of Contents

Enhancement Summary

Company / Contact / Activity

- **FEATURED!** Add ability for administrative users to manually log off SalesCTRL users.
- **FEATURED!** Define criteria for automated log off of SalesCTRL users at a pre-set time.
- Auto-detect installation settings during the SCUpdate.exe installation
- Exclude prefix in Task Manager OUTLOOK export.
- **FEATURED!** Search activities with the activity search screens located on the activity summary and detail screens.
- Print F type fields (multi-level coded) on letters through the Letter Wizard.
- Obtain reports that include embedded and hard coded pie charts and other image files through the Report Manager.
- Quickly and efficiently view all activities with attachments using the attachment lookup.

Detail Tabs

- **FEATURED!** Output custom report to PDF with the Detail Tab Print, "Print to PDF" checkbox.
- Copy detail tabs to another contact with the Detail Tab Copy function, Copy to another Contact radio button.
- Copy lower level detail tabs entries to another contact's upper level detail tab with the Detail Tab Copy function (i.e. Copy quote items to the same contact or another contact's quote).
- Move detail tabs to another contact with the Detail Tab Copy function, Move to another Contact radio button.
- Print a detail tab standard report that includes activities created with "Add Activity".
- Optimize data entry with Detail Tab templates.
- Retain column format changes does not require user log-off.
- Create activities include the current and lower level detail tab information with "Add Activity".
- Recalculate totals on detail tab sub-screens with automatic refresh logic.

Database

- **FEATURED!** Concatenate fixed values, fields, or a combination of both with the field type "@". (i.e. A "contact signature line" field may be created by concatenating first name, a space, and last name). This field type is used to isolate a portion of a field into a new field. (i.e. "Purchase Month" to contain the month from the "Purchase Date" field, or "Sales Year" to contain the year from the "Sale Date" field.)

- **FEATURED!** Display activity attachments by company and contact name with the activity attachment lookup. Change the default display in Admin, Database Menu, Database Preferences, Company/Contact tab by specifying alternate fields to the right of the "Company" and "Contact" checkboxes.

- Compare alphanumeric fields to "@" fields with a modified field format that does not embed a decimal point.

- Compare numeric fields to "+" fields with a field format that includes a decimal point.

- Specify the default path for producing PDF documents by database in Admin, Database Menu, Database Preferences, General tab.

- Increased field size on Alphanumeric (A and a) as well as Web (W) type fields from 76 to 120 characters.

General

- Print to PDF using the SCDP printer installed with scupdate.exe and scwkstn.exe.

- Resize print screens in the company, contact, and detail tab screens.

- Resize the activity template, Letter Wizard, and code maintenance screens.

Import / Export

- Print an audit report of the process including file name and size, process start, end, and elapsed time, as well as the number of SalesCTRL database records affected, with the Import Manager "Print Audit Report" checkbox.

- Resize and reformat import and export screens.

Installation

- **FEATURED!** The SalesCTRL executable program is renamed from sc97.exe to SalesCTRL.exe and a corresponding desktop shortcut is created. New desktop items are created on each network workstation by running SCWKstn.exe. Desktop shortcuts that reference the old executable program name must be removed or the executable program name changed. If the program name is not changed, the executable program is not found when launching SalesCTRL from the desktop icon. All other references to the old executable program, such as Windows scheduled task definitions, must be changed.

- **FEATURED!** This update **must** be installed at the file server where SalesCTRL is installed (for all network installations), and the scwkstn.exe must be installed on each network workstation.

Query Wizard / Lookup Menu

- Display the contact record number in addition to the detail tab fields in company or contact detail tab queries, with the "Details" button.
- Query records using **"m"** and "**M"** Memo, "@" and "+" calculated, and activity attachment field types.
- **FEATURED!** Compare the activity "Job ID" field to a detail tab field such as "job #", "project #" or "opportunity #" in the Query Wizard with the "Another Field" checkbox on the "Value to Compare" column. This links an activity record with multiple detail tab records or vice versa for reporting and organization.
- **FEATURED!** View activity attachments by company, contact, and activity with the new Activity Attachment lookup. The default display may be changed from company and contact name to another company and contact field specified in the Admin, Database Menu, Database Preferences, Company/Contact tab, "Company" and "Contact" fields.
- Resize the query specifications and results screens.

Report Manager

- Include fields from the Account Rep and / or Sales Partner tables in reports by selecting the CODE table in conjunction with the Contact or Company Account Rep or Sales Partner field respectively.

Security

- **FEATURED!** Limit access to add functions by user with the Admin, System Security, User Maintenance, Preferences, Add/Delete Records tab, Add checkboxes. The Add security functions the same as the Delete security, if the "Prohibit user from Adding all Records" checkbox is marked, Add functions globally secured off from the user. If the checkbox is blank, the company, contact, activity, attachment, account rep, sales partner, and detail tab add functions can be secured for the user.
- Secure the addition and deletion of activity attachments and individual detail tab levels by user in the Admin, System Security, User Maintenance, Preferences, Add/Delete Records tab.
- Display only active databases with the Admin, System Security, User Status List, "Show only active Database" checkbox.
- Specify the default path for producing PDF documents by user in Admin, System Security, User Maintenance, Preferences tab.
- Menu Maintenance controls the display of menu items based upon the security level assigned to the user and the menu item. Instead of graying out the item, the menu item is not displayed.

Task Manager

- Compare a detail tab field to an activity field. This feature allows you to compare the activity job # to a detail tab field such as job# or project# in order to associate specific activities to specific detail tab records.
- Select records in the Task Manager using **"m"** and "**M"** Memo, "@" and "+" calculated, and activity attachment field types.
- Delete "linked" attachments for an activity from the DOCLINKS folder with the Tasks, Task Manager, DELACTIVITY function.
- Resize Task Manager screens.
- Enhance the Email attachment function to display the attachment type and tool tip with name.
- UPDATE step displays fields with values instead of entire field list after initial setup with option to list all fields.
- Add automatic retry to send EMAIL for slow connections to external SMTP mail servers.

To Do List

- Perform a secondary sort by priority in ascending order with the Lookup, To Do List. If the follow-up date sort order changes from descending to ascending order, the secondary priority sort remains sorted in ascending order.

Log Off

- Add user specific auto-log off function in Database Preferences and User Maintenance.

Utilities

- **FEATURED!** Restore Deleted detail tab records with the Admin, Utilities, "Restore Deleted Records" utility. Screen display reflects the Company, Contact and Detail Tab fields associated with each record.
- Recalculate calculated fields with the Admin, Utilities, Validate Field Calculations utility.
- Recall deleted detail tab records with Admin, Utilities, Restore Deleted Records.

Data Synchronization

- Add embedded and linked attachments.
- Add objects embedded on the company and contact screen.
- Add new “@” type field.
- Add the active/inactive status of a company or contact.

HotLink – Open Systems® Accounting Software & Order PLUS! v7.5, and TRAVERSE® v10.5

- Prompt for entry of accounting server name for ODBC driver setup.
- Support defaults for Location and Batch from User Setup in OSAS.
- Enhance attachment process for Order Acknowledgement and Quote email.
- Add prompt to create an activity when emailing Order Acknowledgement and Quotes.
- Add security by user to control creation of new accounting customer record from SalesCTRL.
- Add Customer Price Levels and Quantity Price Breaks by location to OSAS Inventory Inquiry.
- Eliminate General Ledger application requirement for OSAS HotLink
- Remove older versions of HotLink from software build.

Corrections

- Retain changes to the “Primary Contact” field captions.
- Eliminate error accessing printer/spooler when selecting Cancel during the “Print to PDF” print function.
- Include embedded object fields in sync log with data synchronization option.
- Eliminate error when double-click on the Query result column header.
- Eliminate error when double-click on a To Do List item for users with a data level of 9.
- New activities default to the Sales Partner specified in the Maintenance, Activity Template, DEFAULT template.
- Eliminate error when click on the attachment icon in Maintenance, Activity Template.
- User security data level combined with data group now uses the AND condition rather than the OR condition to control record access. Previously, user access was controlled by ownership OR accounts containing data groups specified for the user in User Maintenance. (Account Rep OR Data Group1 OR Data Group2) This is n modified to control record access based upon accounts owned by the account rep AND that have any of the data groups specified in User Maintenance. (Account Rep AND Data Group1 OR Account Rep AND Data Group2).
- Changes to contributing values are immediately reflected in “+” numeric accumulator fields.
- Enter a zero value lower level detail tab record no longer zeroes the balance of upper level numeric accumulators.
- Select Cancel on the detail tab template screen during detail tab entry returns to the detail tab list instead of creating a new record.
- Run Admin, Database Menu, Change Database and Detail Tab Setup does not result in sporadic “Can not lock the database” messages.
- Close a database and open another does not result in sporadic “Can not locate user XXX” (where XXX = 3 character user).
- Edit by multiple users of a single company, contact or detail tab record does not result in “Update Conflict” error message.

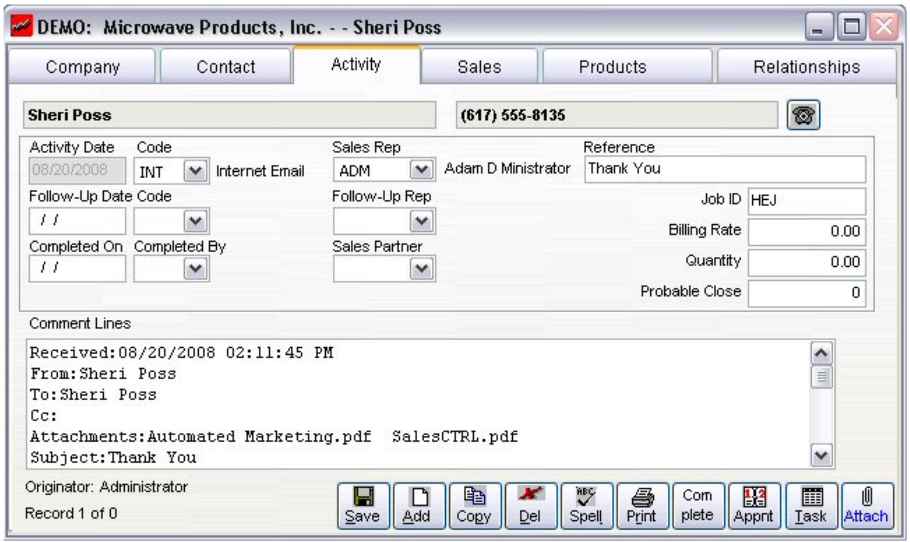
Corrections (continued)

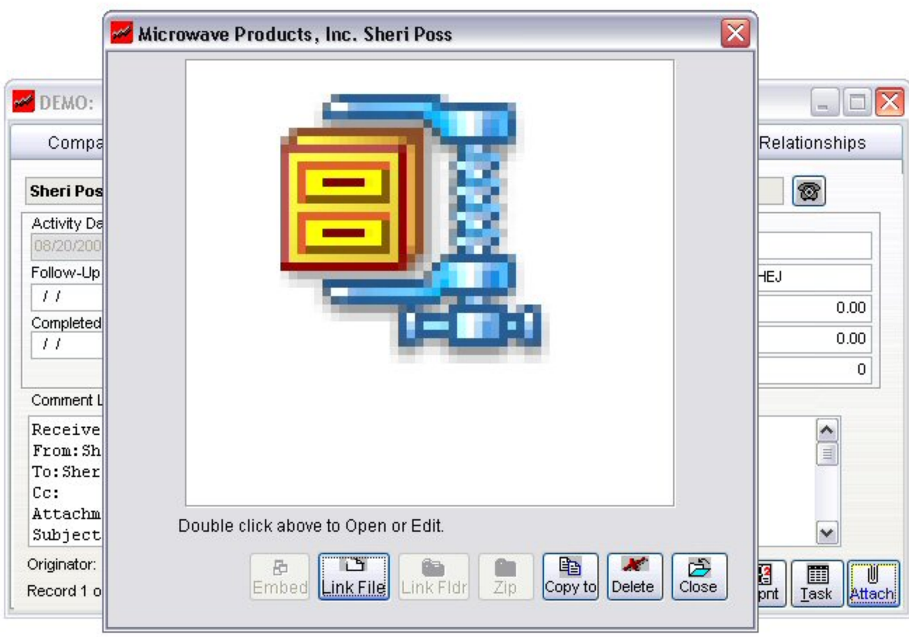
- Run a task with the DELACTIVITY function deletes only activities for qualifying contacts based upon activity field selection rather than deleting all activities for the qualifying contacts. When the function is selected the activity criteria selection button appears to the right.
- Run a task with the UPDATE function updates only activities for qualifying contacts based upon activity field selection rather than updating all activities for the qualifying contacts. When the function is selected the activity criteria selection button appears to the right.
- Eliminate error in the Detail Tab lookup function.
- Rework accumulators on the Detail Tab to correctly calculate.
- The Task Manager field selection criteria for updating activities with the UPDATE function was selecting all activities for the qualifying contact. The selection screen is changed so that if activity selection criteria are included, only the qualified activities for the qualified contacts are updated. If no activity selection is included, then all activities are updated for the qualifying contacts.
- Corrected Transfers |Company/Contacts function to include activity attachments.
- Retain Query Wizard column order settings by user.
- Retain Detail Tab Search column order settings by user.
- Fixed miscellaneous screen resizing and display issues.

Featured Enhancements

Create Activity from Outlook E-mail with Multiple Attachments

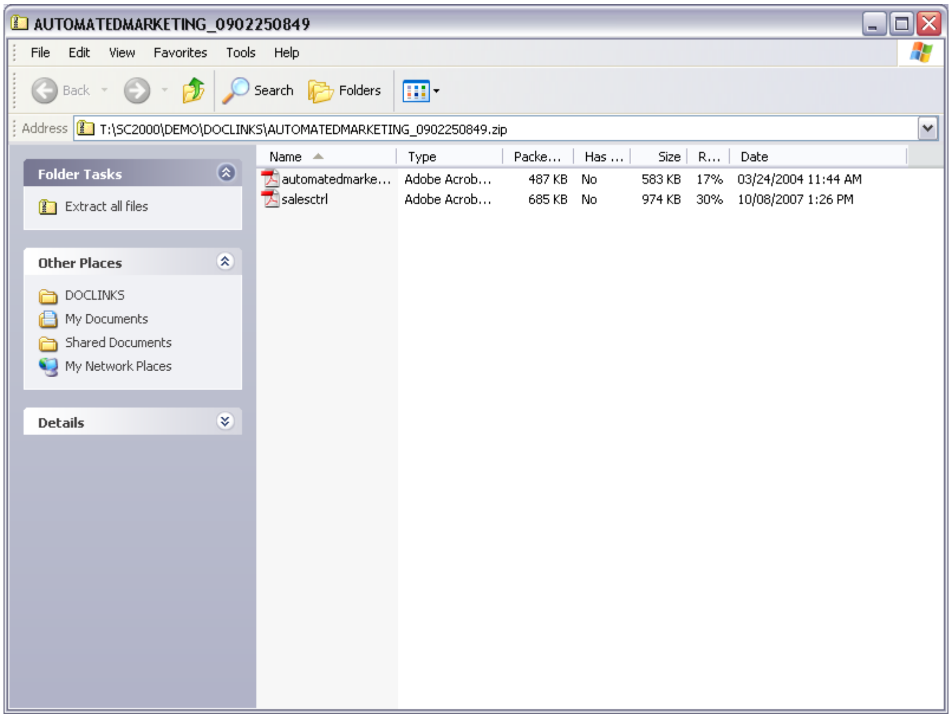
The activity created by the e-mail drag and drop function from Outlook retains multiple e-mail attachments. The attachments are added to a zip file located in the database specific doclinks directory instead of embedded in the activity file, and the Attach icon is highlighted.





Enhancements (continued)

Click on "Link File" to add additional attachments, "Copy to" to copy the zip file, "Delete" to delete the zip file, or "Close" to close the attachment screen. Click on the zip file image to view the attachments.



SalesCTRL automatically names the zip file with the first document name plus the date and time. If the file exists, a numeric suffix is added (i.e. 0808201415_2.zip).

Drag and Drop E-mail to Contact Screens Creates Activity

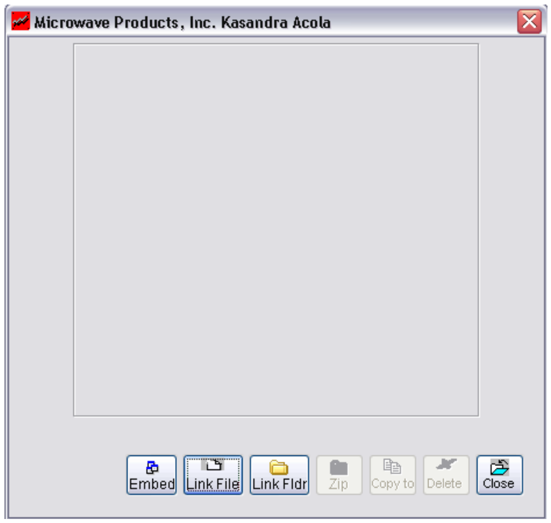
Drag and drop email now works on the contact screen and contact custom field screens in addition to the contact activity screen.   Drag an email to any of these screens, drop it, and an activity including attachments is created.

Previous Featured Enhancements

Activity Attachments – Linked and Embedded

Multiple attachments can be added to activities. To add an attachment to an activity, open the activity, and click on the paperclip icon labeled “Attach”.

The following screen is displayed:



Embed - Embedded attachments are added/embedded directly into the SalesCTRL activity file. The advantage to embedded attachments is the file follows the SalesCTRL installation, and remains accessible, even if the installation is moved to another location or server. The disadvantage is the attachments can bloat the activity file to its maximum capacity, requiring the creation of a historical database to store old activity records in order to make room for new activities and attachments in the live database.

Link File - Linked file attachments are copied to the SalesCTRL database-specific Doclinks directory, and linked to the activity. If multiple files are required for one activity, choose “Link File” again, and the subsequent document(s) are automatically zipped to a zip file with the original document. This approach organizes the linked files in a specific location, and therefore makes it easier to migrate SalesCTRL to a different installation.

Link Fldr – Linked folders link to the original location of the folder. It is advisable to use caution when linking folders and link only to folders that are accessible to all SalesCTRL network users. If the folder is moved from its original location, the link is broken.

Zip – Compresses the file.

Copy To – Copies the attachment another location and leaves a copy in the SalesCTRL folder.

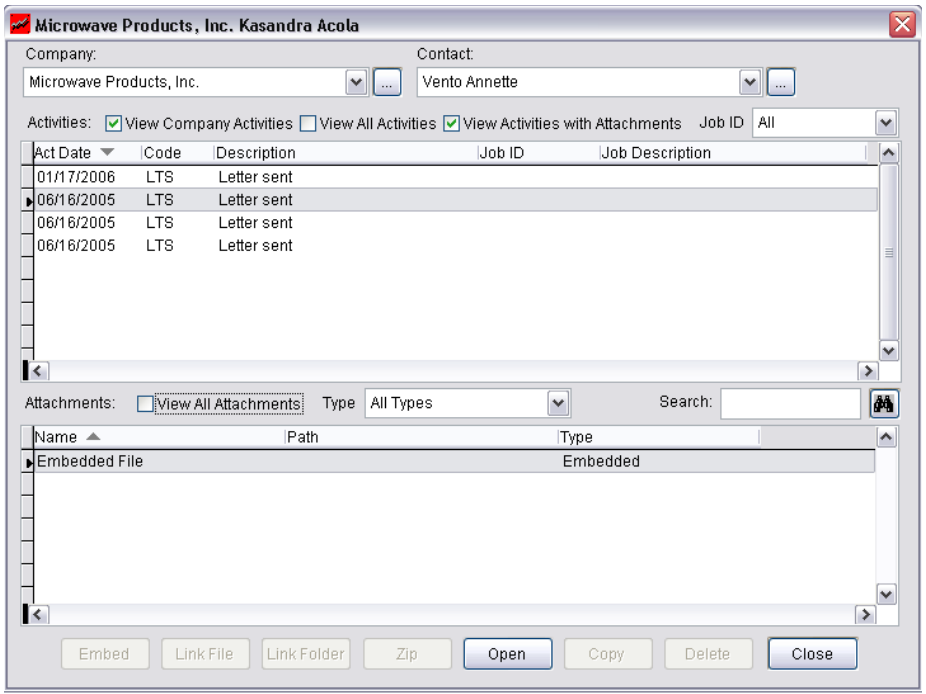
Delete – Deletes the attachment.

Close – closes the attachment screen.

Previous Featured Enhancements (continued)

Activity Attachment Lookup

The Activity Attachment lookup is added to the “lookup” menu, and to the SalesCTRL icon bar as a paperclip image.   Select Lookup, Activity Attachment lookup, or click on the attachment icon on SalesCTRL menu.



Attachments are displayed by company and contact. The lookup defaults to the active contact and the checkboxes and pull downs provide additional selection criteria.

View Company Activities – Display all activities for the company.

View All Activities – Display all activities.

View Activities with Attachments – Display the activities with attachments for the selected company and contact.

Job ID – Display only activities and attachments with the corresponding Job ID.

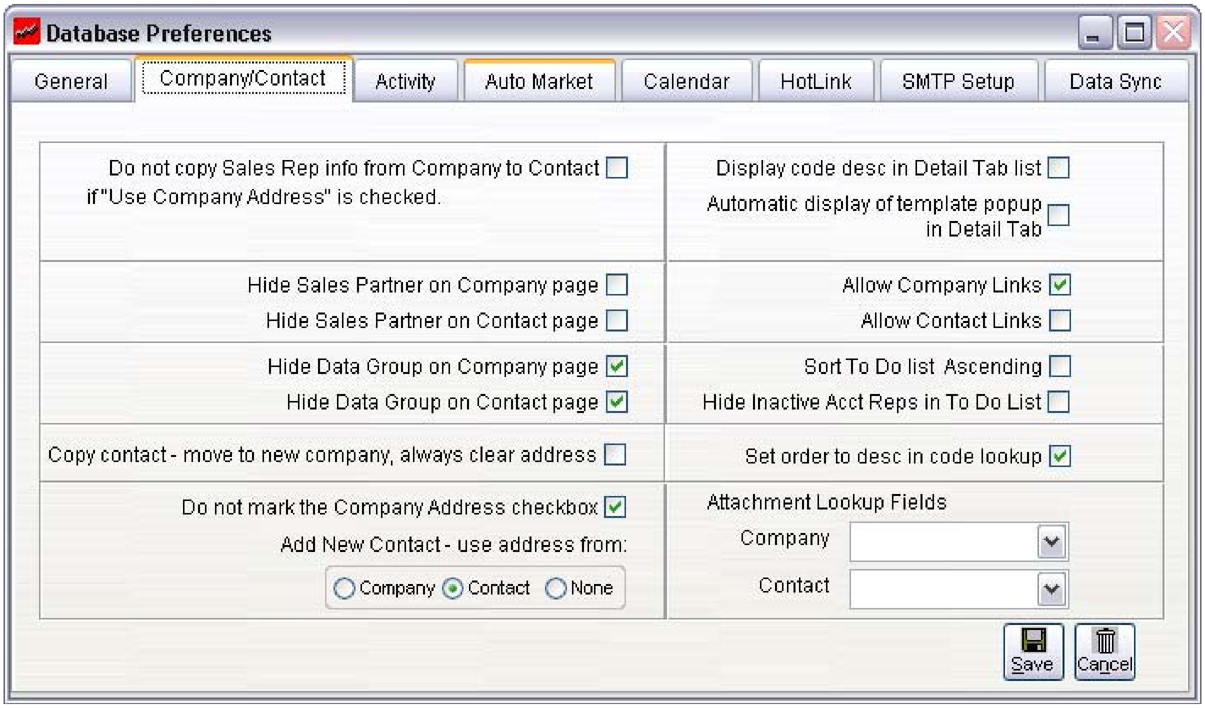
View All Attachments – Display all attachment types (linked and embedded).

Type – Display the selected attachment type.

Previous Featured Enhancements (continued)

Search – Locate attachment based upon name or description.

To display attachments by fields other than the default (i.e. by accounting ID or custom field rather than company and contact name), go to Admin, Database Menu, Database Preferences:

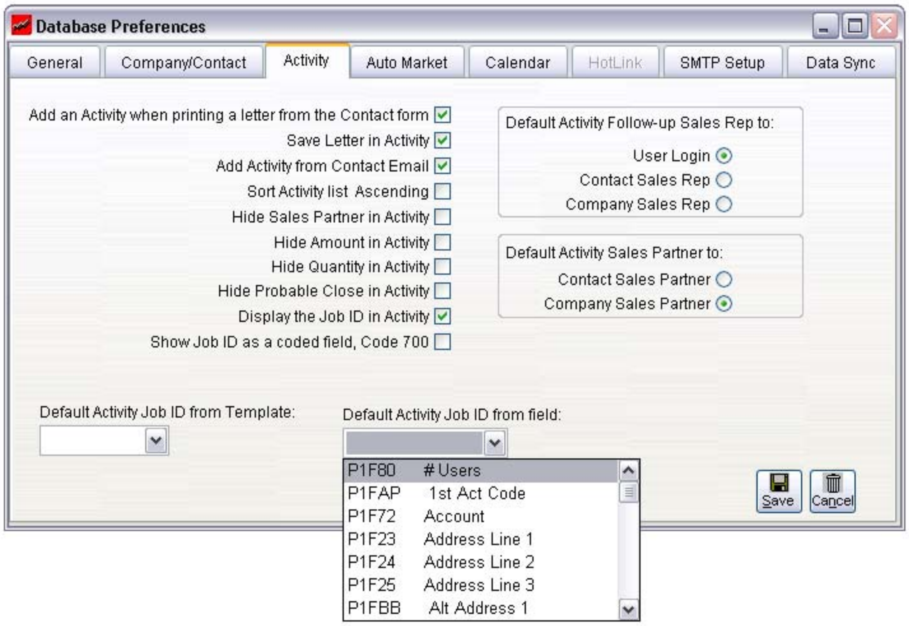


Select alternate field(s) for the company and contact attachment display in the "Attachment Lookup Fields" section. The attachment lookup will display by the fields specified in the boxes, to clear the boxes and return to the default values, select delete or backspace to clear the field contents.

Previous Featured Enhancements (continued)

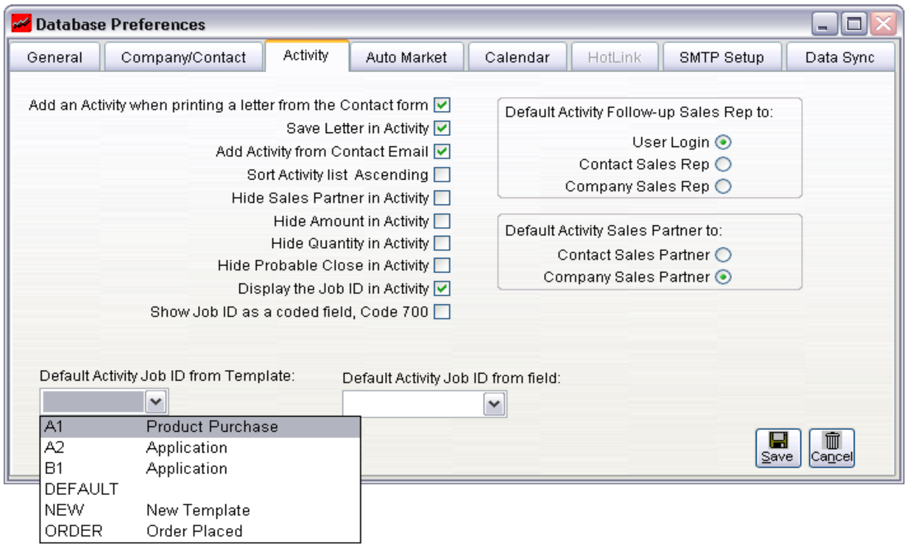
Activity Job ID

The activity Job ID is populated with a field from the database or from an activity template in Admin, Database Menu, Database Preferences. Click on the "Default Activity Job ID from field:" drop down box to select a field for new activity job ID population:

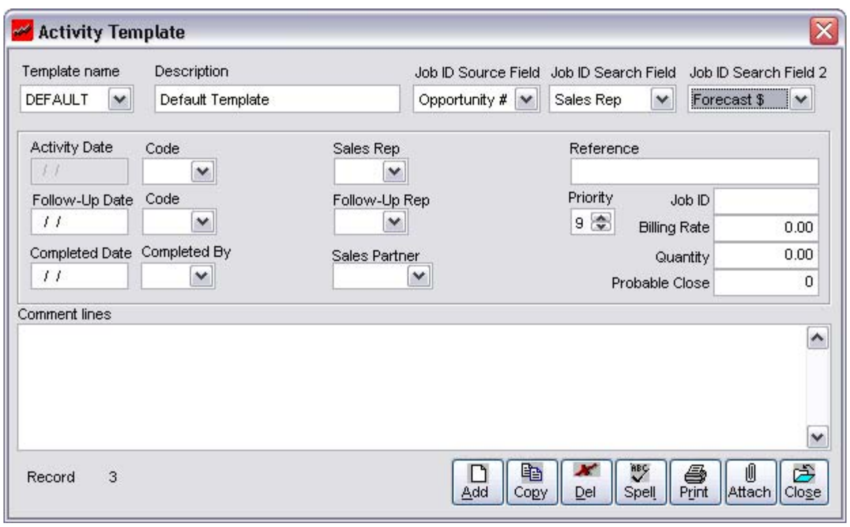


Click on the "Default Activity Job ID from template:" drop down box to select a template for new activity Job ID population:

Previous Featured Enhancements (continued)

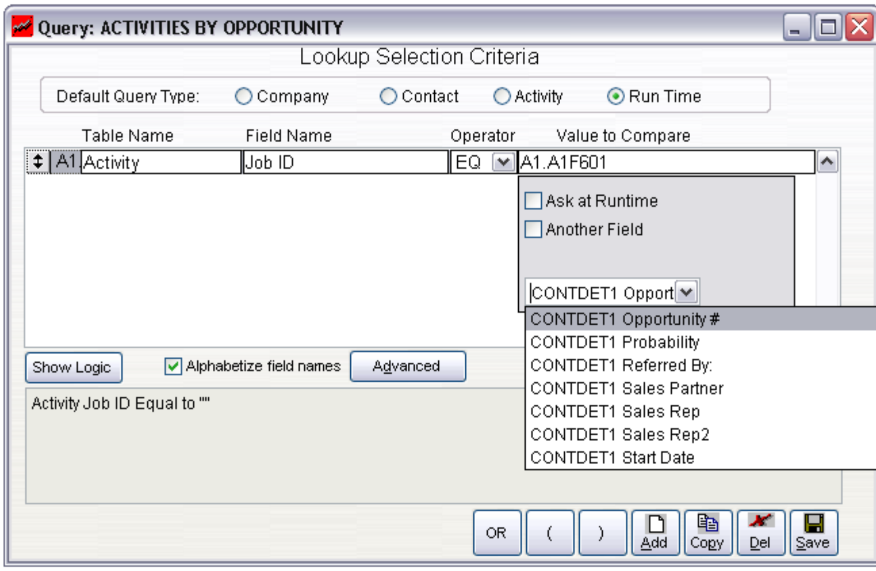


If the activity is populated from an activity template, go to Maintenance, Activity Template to define the fields used for the Job ID:



The Job ID is populated when new activities are created from either the detail tab screen, manually, or by dropping and dragging new e-mail from Outlook to SalesCTRL. The Job ID is used to compare detail tab entries to activities by opportunity #, quote# or other value depending upon the detail tab definition. This can be done in any selection screen such as in the Query Wizard or Task Manager:

Previous Featured Enhancements (continued)



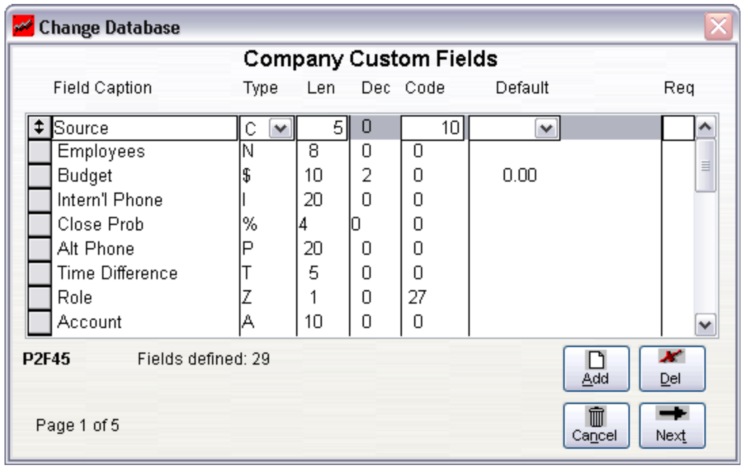
By selecting the activity Job ID field, and comparing it to "another field", (contact detail tab opportunity #), the query will locate the activities that correspond to an opportunity. To select only activities for a specific opportunity, select "Ask at Runtime" and enter the actual opportunity # when the query or task is run.

The Job ID can also be used in the Report Manager to group detail tabs (opportunities or quotes) with their corresponding activities. The company and contact master also use the job ID field to list all detail tabs and associated activities.

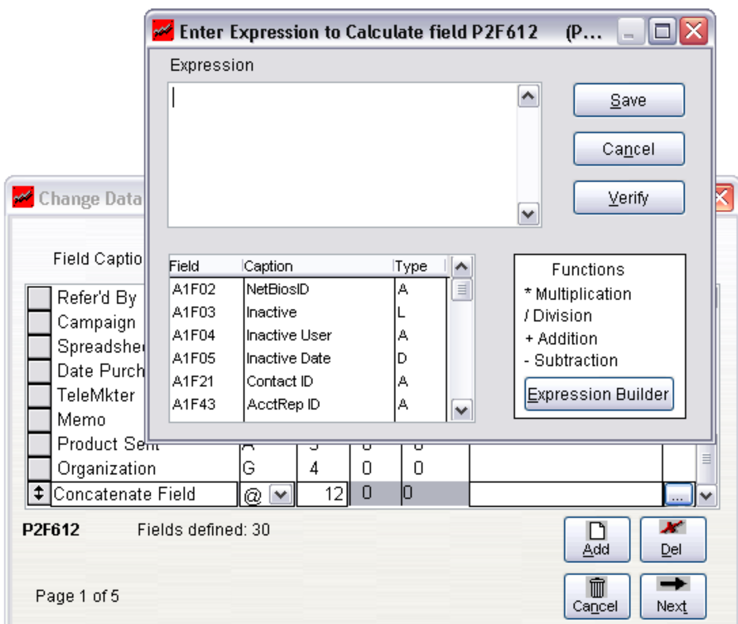
Concatenate with Field type "@"

A new field type, "@" allows alphanumeric and other fields to be joined together in one field. This is useful for storing additional contact full name, devising a quote, job, or opportunity number from department year and month. This field also allows parts of a field to use to form a unique field. This field is useful to pull Order Year from Order Date, or Last Activity Month and Year, for report sorting. The field type is available in Change Database and Detail Tab Setup. To define a new field, make and verify a good backup of your data. With all other users logged out of SalesCTRL, go to Admin, Database Menu, Change Database or Detail Tab Setup and a screen similar to the one shown below is displayed:

Previous Featured Enhancements (continued)



Click on Add to add a new field to the chosen table, and enter a field caption. In the “type” column, select @ for concatenate, and select a length for the field. A “...” button is displayed to the right, click on it and a screen similar to the one shown below is displayed:



The Expression is the area where special commands are entered in order to perform the desired field manipulation. The expression box expects the field names to be entered as actual table and field name. Go to Master Lists, Database Field to print a list of database fields. This utility can print all or individual field name tables.

Previous Featured Enhancements (continued)

Sample expression box commands:

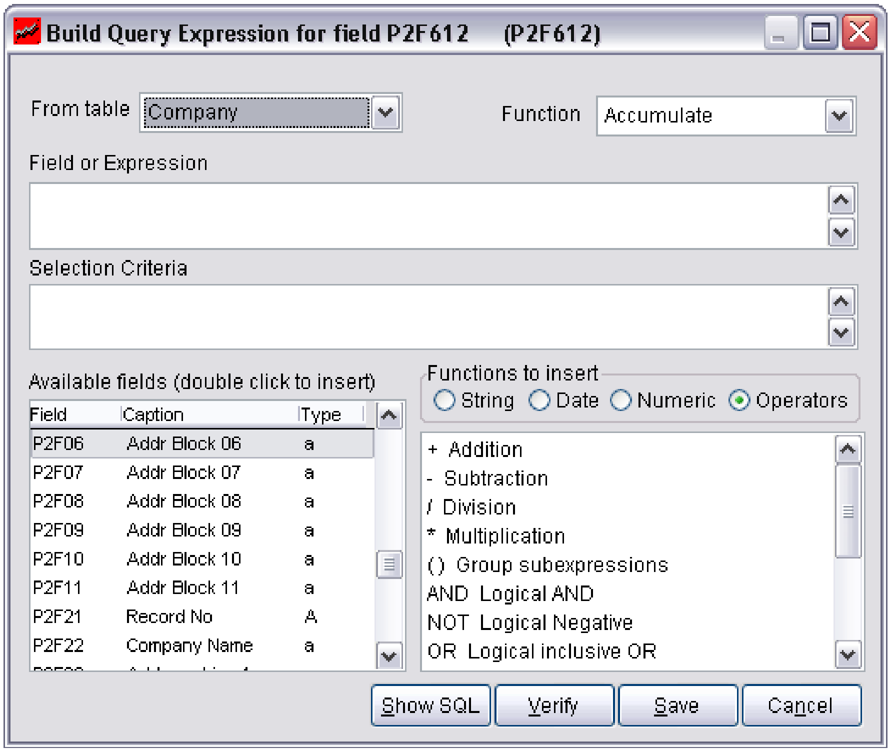
Expression	Result
P1.P1F33 + " " + P1.P1F35	Contact First Name plus a space plus Contact Last Name
TRIM(P1.P1F33) + " " + TRIM(P1.P1F35)	Contact First Name (trimmed to remove excess spaces), plus a space, plus Contact Last Name (trimmed to remove excess spaces).
YEAR(P1.P1F39)	Contact Last Activity Year (From Standard Last Activity Date Field)
MONTH(P1.P1F38)	First Activity Month (From Standard First Activity Date Field)
YEAR(P2.P2FBK)	Company Year Created (From Standard Date Created field)
TRIM(P2.P2F22)	Company Company Name (trimmed to remove excess spaces for reports)
P2.P2F27 + P2.P2F26	Company State plus Company City, with no spaces in between.

While the above samples use standard fields, calculations and concatenations can be accomplished on any single or group of custom fields.

Click on the Expression Builder box in the lower right side of the screen to perform advanced functions or as an alternative to manually typing in an expression. The expression builder is a new feature for @ and + type fields.

A screen similar to the one displayed below appears:

Previous Featured Enhancements (continued)



From Table: Select the table that contains the field or fields to manipulate

Function: Select the function to perform (if any) on the selected table and field(s)

Accumulate – Accumulate a numeric value from a higher level table to a lower level table. Quote Totals for all quotes can accumulate to the Contact; Contact Opportunity dollars can accumulate to the company and so forth.

Lookup – Search for and use a field in the expression

Get Min Value – Obtain the minimum value for a numeric field

Get Max Value – Obtain the maximum value for a numeric field

Get Average Value – Obtain an average value for a numeric field

Count the Number of Items – Count the number of occurrences of a field value

Field or Expression: The expression is populated as fields and functions are selected.

Selection Criteria: Criteria determines when the selected functions are performed.

Previous Featured Enhancements (continued)

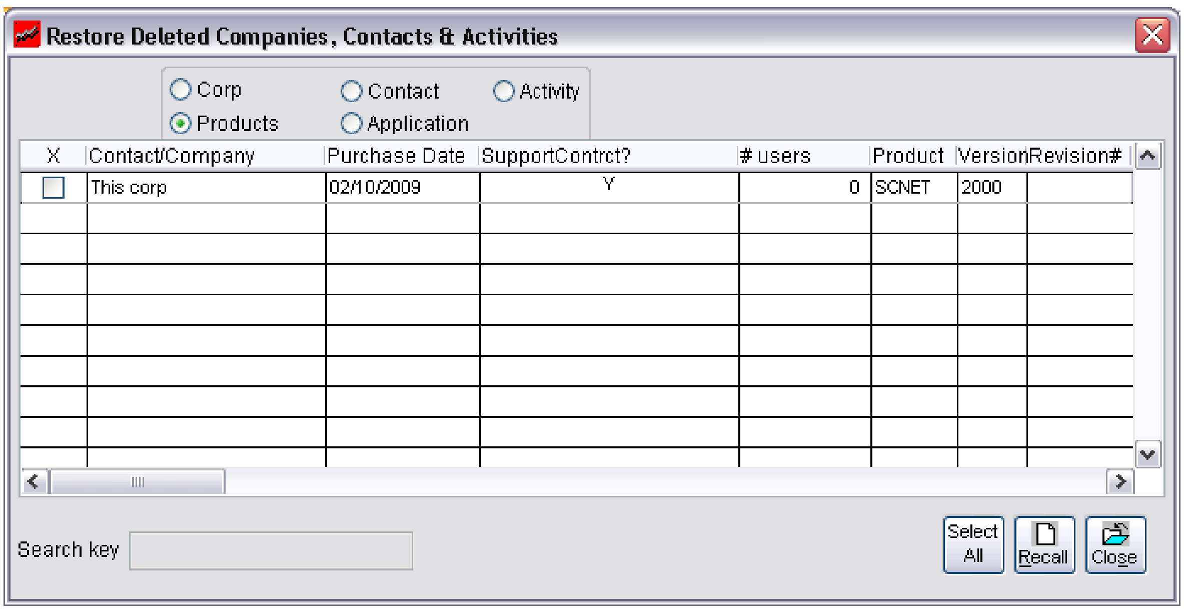
Available Fields: Displays the fields available for input into an expression. Double click to add a field into the expression. Click on the selection criteria box and double click on the field to add it to the selection criteria instead of the expression.

Functions to Insert: Click on a radio button to select string, date, numeric, or operations values to add to the expression.

Icons – Click on Verify to verify the expression and selection criteria, click on Save to save the changes made to the expression, and click on Cancel to cancel all changes made in this screen.

Restore Deleted Detail Tab Items

Recall deleted detail tab records with the Admin, Utilities, Restore Deleted Records" utility. Click on the radio button associated with the detail tab:

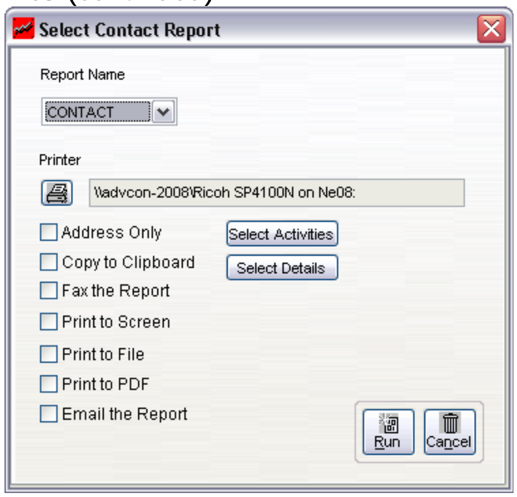


Click on the checkbox to select the detail tab record to recall and then click on the Recall icon in the lower right hand corner of the screen and the record is restored into the database.

SCPDF – SalesCTRL PDF Printer

The SCPDF printer is created during the scupdate.exe or scwkstn.exe process. This printer definition provides the ability to output reports and letters generated within SalesCTRL to a PDF format. After installation, select one of the SalesCTRL print options:

Previous Featured Enhancements (continued)

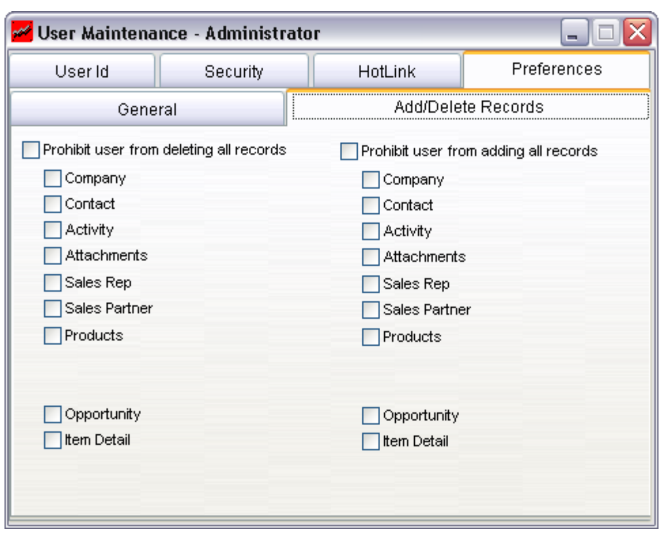


From the SalesCTRL print screens, selecting the SCPDF printer automatically marks the "Print to PDF" box, and selecting the "Print to PDF" box, automatically assigns the printer SCPDF. Select Run, and a prompt to name the PDF file displays.

Note: The SCPDF printer does not generate PDF output when used outside of SalesCTRL.

Security – User Maintenance, Add/Delete Security

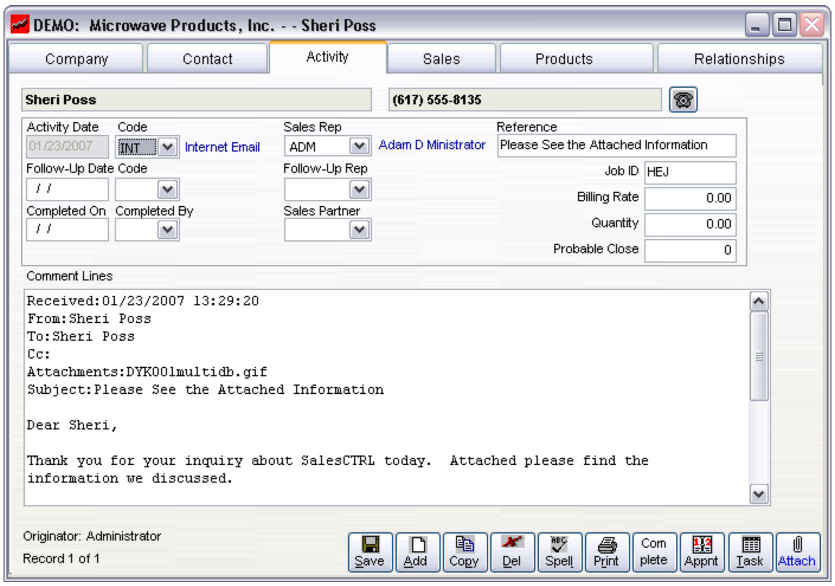
Admin, Security, User Security, Preferences – The Add/Delete Records function provides user specific control to add and delete records. The Delete function was available in the prior release on the General Tab.



Activity Created from Outlook E-Mail

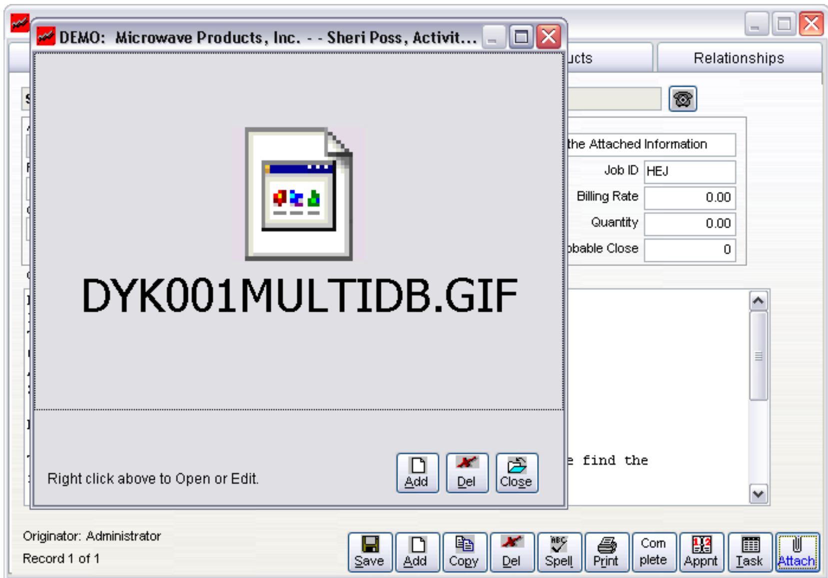
(Featured in the May 2007 Release Notes)

The activity created by drag and drop Outlook email into SalesCTRL includes the first attachment from the Outlook email in the activity. The attachment is embedded in the attachment icon of the activity and the icon displays blue:



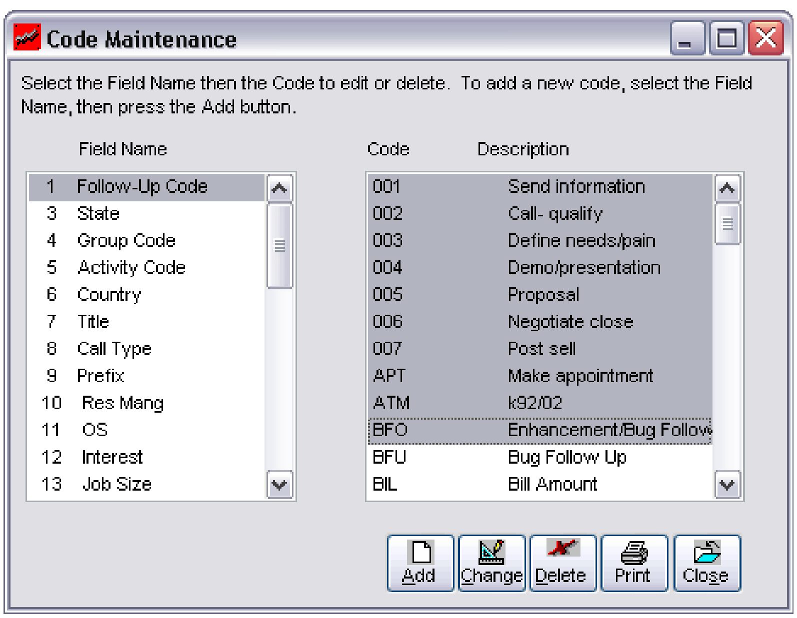
Double click on the "Attach" icon to open the attachment. 

Previous Featured Enhancements (continued)



Code Maintenance – Select and Delete Multiple Codes

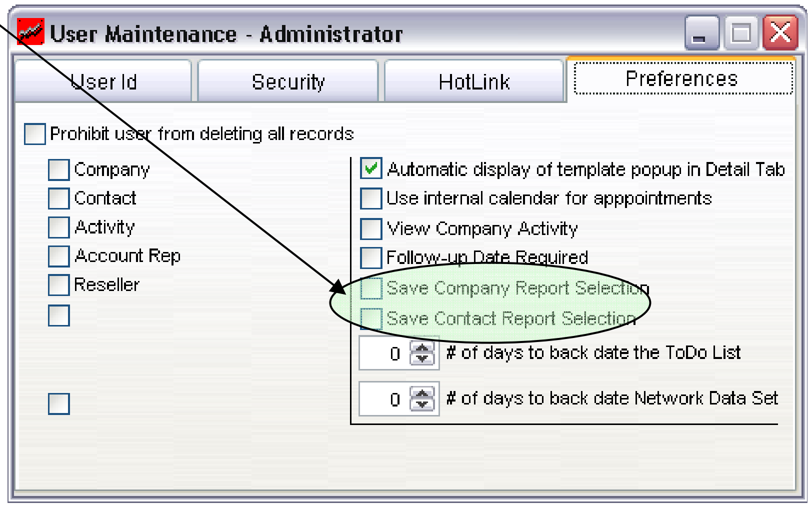
In Maintenance, Code Maintenance, you can select a group of codes to delete. To select a group of codes, click on the first code and select Shift + Click simultaneously to mark the last record.



Previous Featured Enhancements (continued)

Company / Contact Master Print –Retain Selection Settings by User

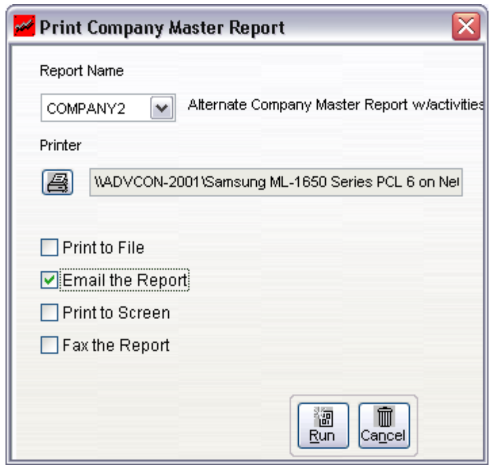
A preference checkbox in Admin, User Maintenance, allows you to save the selection criteria for the company and contact master reports by user.



Company / Contact Print – Custom Report to Email and Fax

Custom reports created with the Report Manager can be emailed or faxed from the Company or Contact Print screens. Prior to this release, SalesCTRL allowed you to select and print custom reports, but you could not email or fax them. From the Print screen, mark the email checkbox after selecting the custom report, the report is produced for the current company or contact and the results emailed as an HTML format attachment through Outlook. When the fax checkbox is marked, the results are faxed through the optional fax software, ActiveFax.

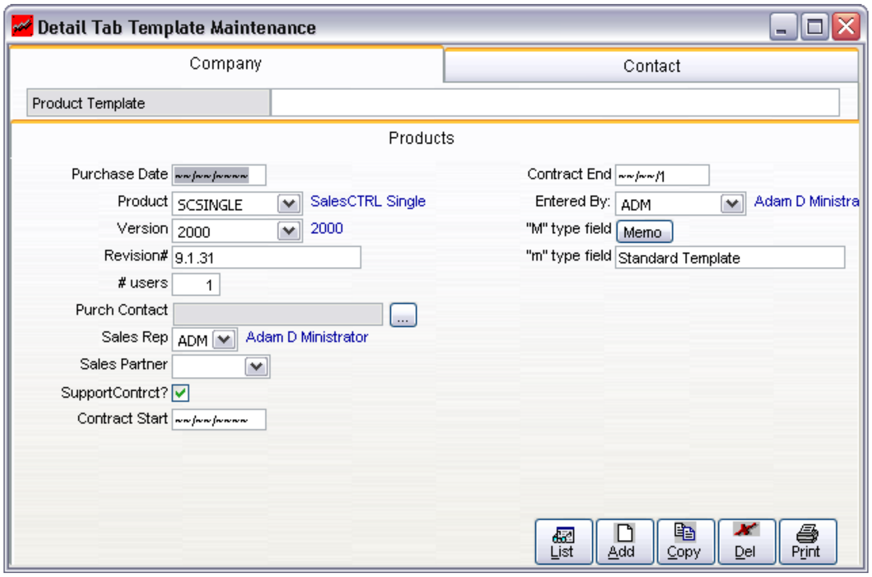
Previous Featured Enhancements (continued)



Detail Tab Template

The ability to define detail tab templates is added to this release. Similar to codes and activity templates, the detail tab template can streamline the data entry process. The template is a data entry form allowing commonly entered data to be stored for quick retrieval during data entry. Some potential applications for the detail tab template are: opportunity management, campaign management, project management and Product or Service entry. Because detail tabs are customized by database, the significance and application of the detail tab template vary from database to database. A sample detail tab template screen is displayed below.

Previous Featured Enhancements (continued)

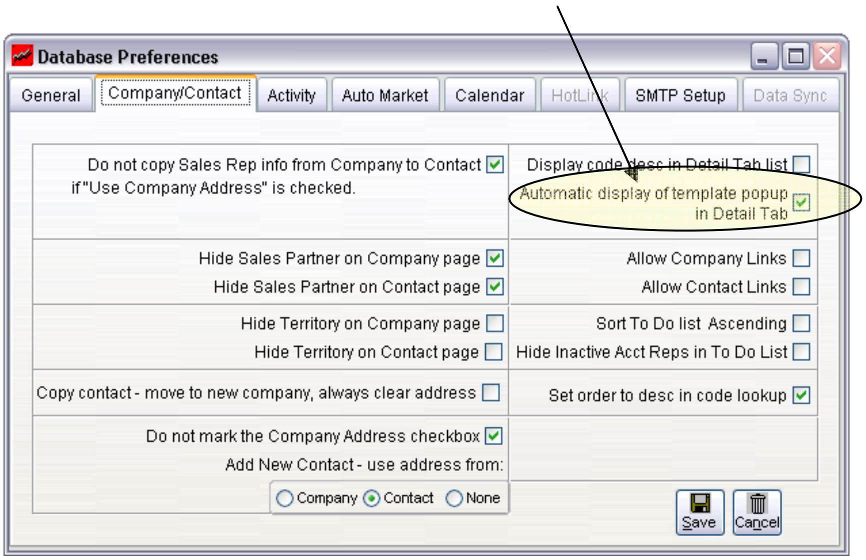


In this example the company detail tab stores information on products purchased by customer. The template allows frequently sold product data to populate the detail tab entry screen quickly. Templates are used when the detail tab stores repetitive and frequently entered information. An unlimited number of templates can be defined; a template can be defined for every product sold, or limited to the most frequently sold products.

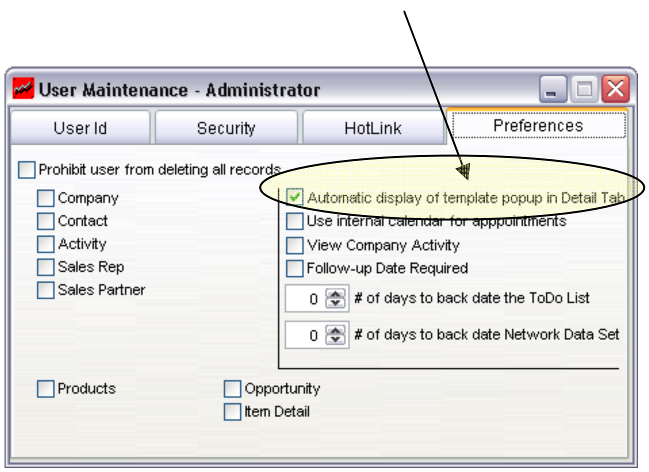
Once a template is defined for a detail tab, there are two ways to access the template list. Admin, Database Menu, Database Preferences and Admin, System Security, User Maintenance both have a checkbox to determine if the template list should pop-up automatically for the current database and user when detail tab entries setup.

Previous Featured Enhancements (continued)

Database Preference Setting

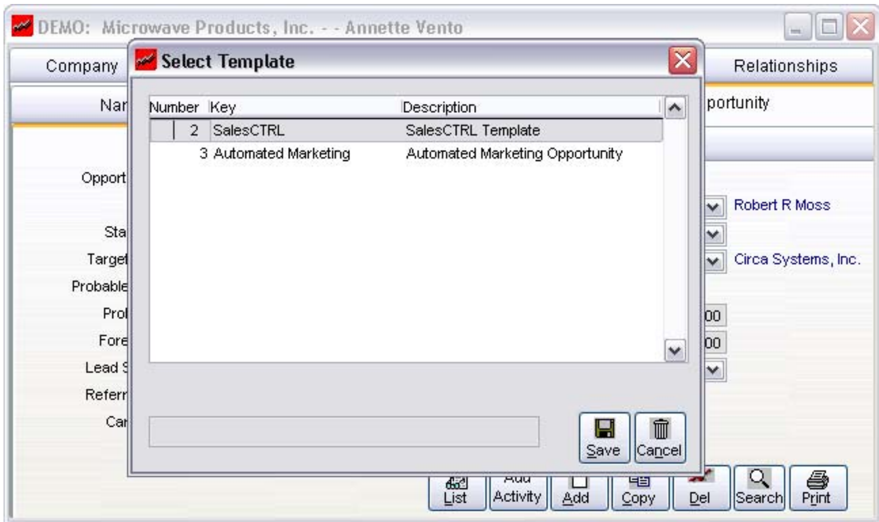


User Maintenance Setting



If the checkbox is marked for either the current user or database, and the Add is selected from the detail tab list or add/edit screens the template list displays by default.

Previous Featured Enhancements (continued)

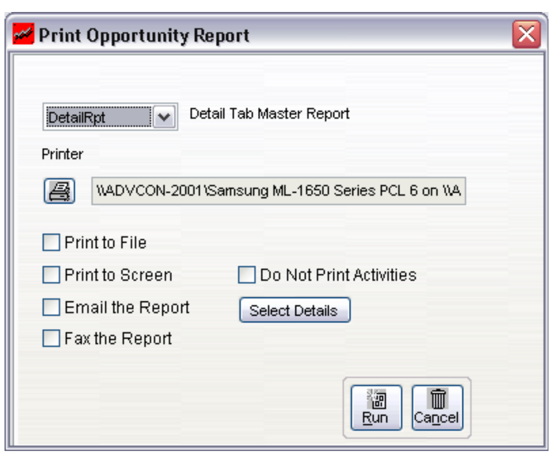


To enter detail tab information manually, select Cancel on the template pop-up window.

If the checkbox is not marked for the current database and/or user, the template list will not automatically display when Add is selected from the detail tab list or add/edit screens, but may be accessed by pressing a right click rather than left click on the detail tab Add button.

Detail Tab Print – Standard Report to Email and Fax

The detail tab Print allows you to output to email or fax the standard detail tab master report. Select Print from the detail tab list or entry/edit screen and a screen similar to the following is displayed:

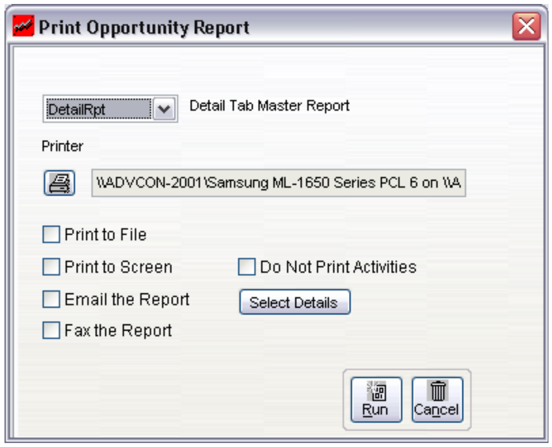


Mark the "Email the Report" to email or "Fax the Report" to fax, and then press Run to output the standard detail tab master report by the selected method.

Previous Featured Enhancements (continued)

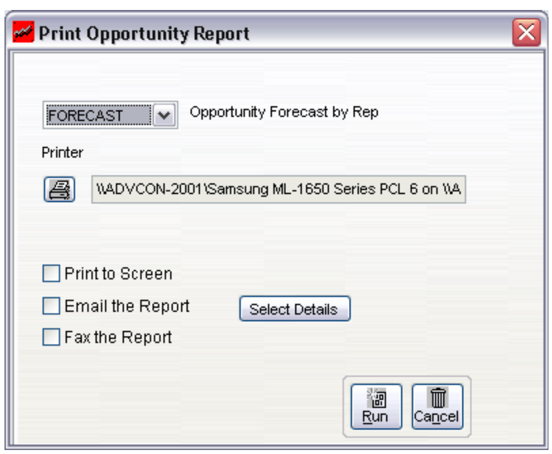
Detail Tab Print – Standard Report with Activities

In this release, activities corresponding to the detail tab entry are automatically included in the standard detail tab master report output. To exclude activities, mark the “Do Not Print Activities” box and click Run to produce the report.



Detail Tab Print – Custom Report

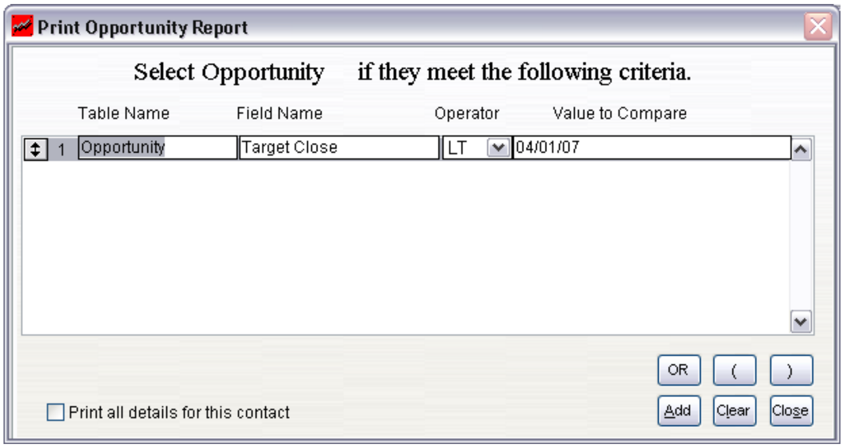
In previous releases, detail tab Print allowed only the printing of a standard detail tab master report. Any custom detail tab report you designed through the Report Manager can be selected for output from a pull-down box:



When you select a custom report from the selected detail tab record, you can print, email or fax it. If the output is required for a record other than the one currently selected, you may either close the print screen and select another record or click on the Select Details icon to specify the detail tab record(s) to output.

Previous Featured Enhancements (continued)

In the "Select Details" sub-screen, you may mark "Print all details for this contact" to output all detail tab records for the selected contact, or enter field selection criteria to specify the detail tab entries to output:



When detail tab selection is complete, click Close to close the sub-screen and return to the detail tab print screen:

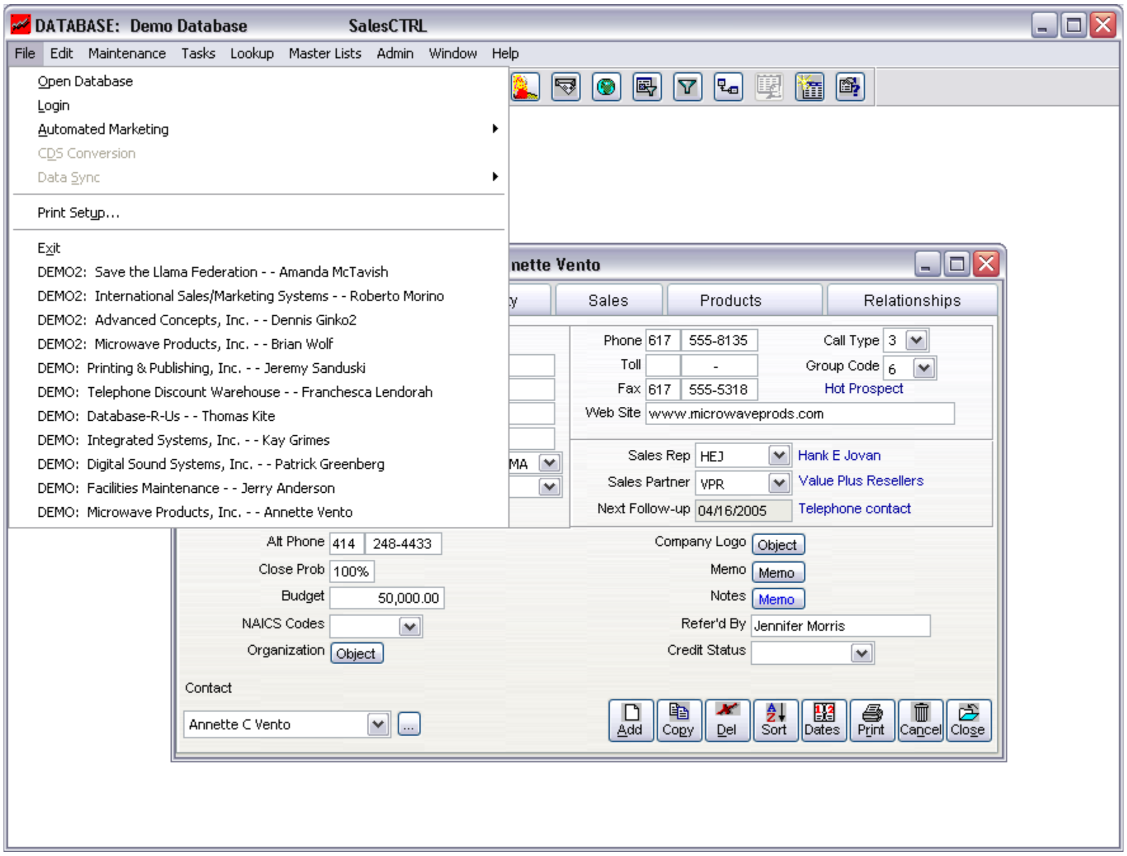
Previous Featured Enhancements (continued)

As with the standard detail tab master report, the custom report may be output to printer, fax or email. Mark the output method and then press Run to produce the report output.

Previous Record Listing

SalesCTRL lists your previously accessed company / contact records in the File menu pull down.

Previous Featured Enhancements (continued)



The number of records retained in the File List is controlled with the "Entries in Recently Used List" field located in Admin, System Security, Login Maintenance.