Account Book

User Manual

2008 Edition

Credits

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1.0 INTRODUCTION

Account Book is a Federal-Mogul application used to review and update customer contact information with an emphasis on call history and notes.

The sales person and/or sales manager can also review the information entered by his/her staff.

There are two major perspectives (views) of data:

- **Account information** (specific information about the customer)
- **Employee information** (Federal Mogul employees and their customer/product line assignments).

1.1 STARTING ACCOUNT BOOK

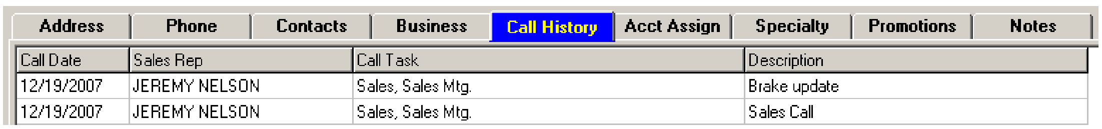
1. From the SFA Desktop, *click* the Account Book short cut.
2. A pop-up window will appear showing that the Account Book program is being initialized.
3. The Account Book View opens. The Account Book View and the Sales Administration View share the following
   - Menu Bar
   - Tool Bar
   - Navigational Buttons
   - Summary fields
   - Detail Tabs displaying search results

14.0 CALL HISTORY TAB ON ACCOUNT BOOK VIEW

The Call History tab shows all recorded calls associated with an account after a search. (To Find an Account, see page 20.)

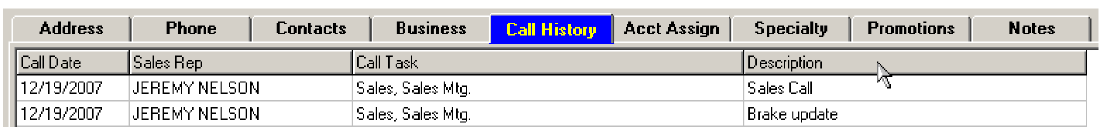
You may add an Account Call, change an Account Call, or delete an Account Call.

1. After conducting an account search, the results display on the Account Book View.
2. *Click* the Call History Tab.
3. Calls are displayed in order by call date where the most recent call is displayed first.



Call Date	Sales Rep	Call Task	Description
12/19/2007	JEREMY NELSON	Sales, Sales Mtg.	Brake update
12/19/2007	JEREMY NELSON	Sales, Sales Mtg.	Sales Call

4. However, you may sort the results in the grid by *clicking* on the Column Header to resort the column.



Call Date	Sales Rep	Call Task	Description
12/19/2007	JEREMY NELSON	Sales, Sales Mtg.	Sales Call
12/19/2007	JEREMY NELSON	Sales, Sales Mtg.	Brake update

14.1 CHANGE THE DATE RANGE

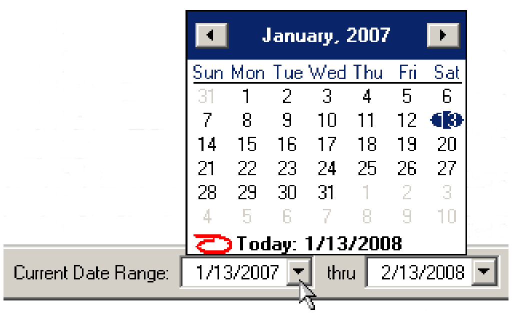
You can limit or expand the number calls that are displayed on the grid by changing the date range.

1. Go to the bottom of the Call History window and locate the Current Date Range fields.
2. The system defaults to displaying a date range beginning 12 months ago to one month in the future.

3. You have two options to changing the date range.
   - You can select an individual month, day, or year in the date field.
   - You can use a pop-up calendar to select the date.

Select the Date Range by Calendar

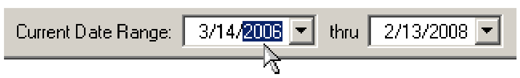
1. If you wish to use the pop-up calendar to limit or expand your date range, then *click* the down arrow in the beginning date range field. (The left field.)
2. A pop-up calendar displays.



3. *Click* the left arrow at the top of the pop-up window to select a previous month. *Click* the right arrow to select the next month.
4. Once you have selected the month, *click* on the day of the month. The selected date is displayed in the left date range field.
5. Repeat with the end date range field. (The right field.)
6. When you have determined your date range, the system automatically displays the results in the Call History grid.

Select the Date Range by Keyboard and Mouse

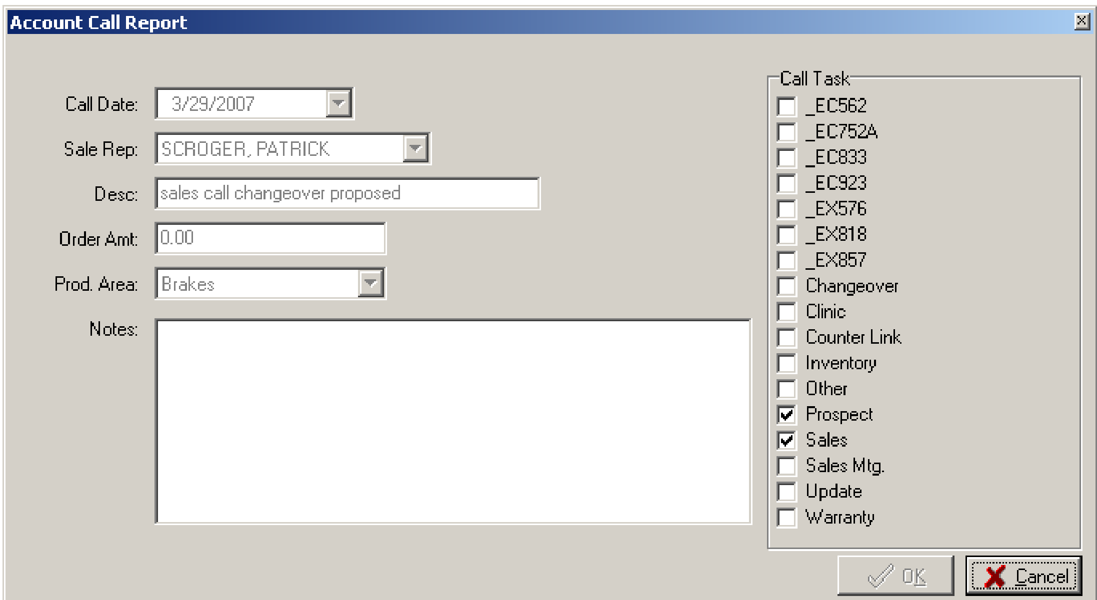
1. If you wish to use the Mouse and Keyboard to limit or expand your date range, then *click* in the beginning date range field. (The left field.)
2. *Click* on the month, day, or year part of the field.



3. On the keyboard, use the Left Arrow key to move to the part of the field to the immediate left. Day moves to Month. Month moves to Year.
4. Use the Right Arrow key to move to the part of the field to the immediate right. Day moves to Year. Year moves to Month.
5. On the keyboard, use the Up Arrow key to go forward through the calendar. Use the Down Arrow key to go back through the calendar.
6. Once you have selected the beginning date range, *click* in the end date range field. (The right field.)
7. Repeat the process for the end date range field.
8. When you have determined your date range, the system automatically displays the results in the Call History grid.

14.2 VIEW AN ACCOUNT CALL RECORD

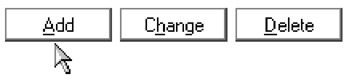
1. If you wish to view a call record, then select the call record from the grid and *double-click* on it.
2. The Account Call Report opens.
3. You may view anyone's call information, but you can only modify your own Call records.



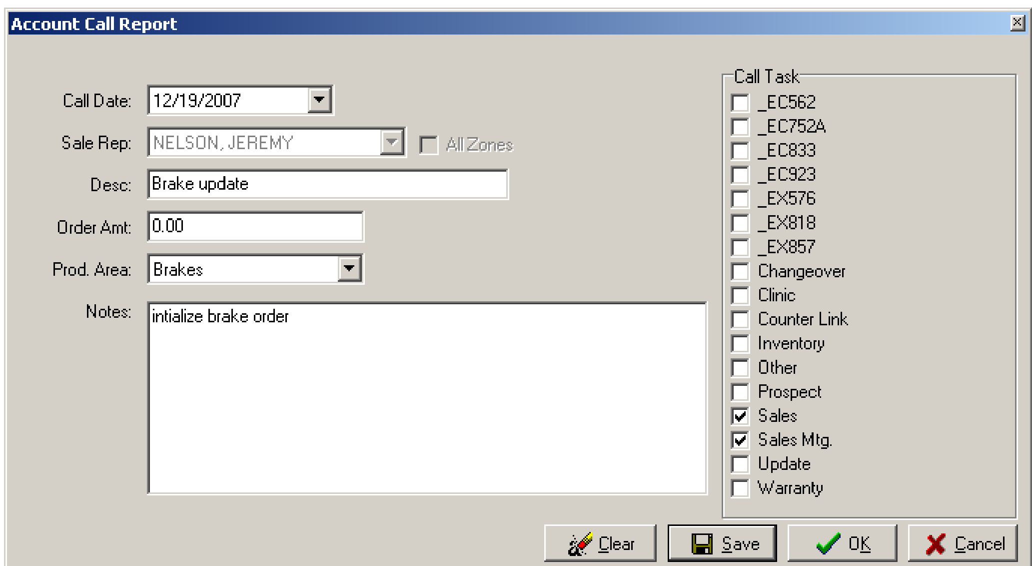
14.3 ADD A ACCOUNT CALL RECORD

Every time you perform a call to a customer or to a prospect, you need to record the results of the call for the Call History.

1. To add another call record to the account, *click* on the Add button located at the bottom left of the Call History Tab.



2. The Account Call Report window opens. The window is divided into 2 areas: Information and Call Task. See the next page for details on their use.
3. The following example has fields filled in for you.



4. After entering information into the fields in the information area and the appropriate checkboxes in the Call Task area, *click* the Save button.
5. The call record is added to the Call History grid.

Information Area

In the information area, you have several fields to enter information. All fields are required except the Notes field.

In the Call Date field, the date displayed may not be today's date. If you are using the Sticky Date feature, (See page 16.) then the sticky date will be displayed. You may change the date as needed just by *clicking* the down arrow in the field and *clicking* on the appropriate date from the calendar.

The Sales Rep field defaults to you. It cannot be changed.

Use the Desc field to briefly describe the results and/or purpose of the call.

Use the Order Amt field to enter in a dollar amount that was ordered. If no dollar amount applies to this call, then leave the amount as zero.

In the Prod Area field, *click* the down arrow to bring up a list of the product areas currently available. (This list may change.)

Bearings & Seals	Brakes
Chassis & Driveline	Engine
Fuel Systems/Water Pumps	Gaskets
Plugs/Wires/Wipers/Lighting	Other

Enter into the Notes area any additional notes that would be helpful.

Call Task Area

The Call Task field allows you to associate one or more call tasks with the current call. *Click* the checkbox next to all the events that apply to this call that are currently available. (This list may change.)

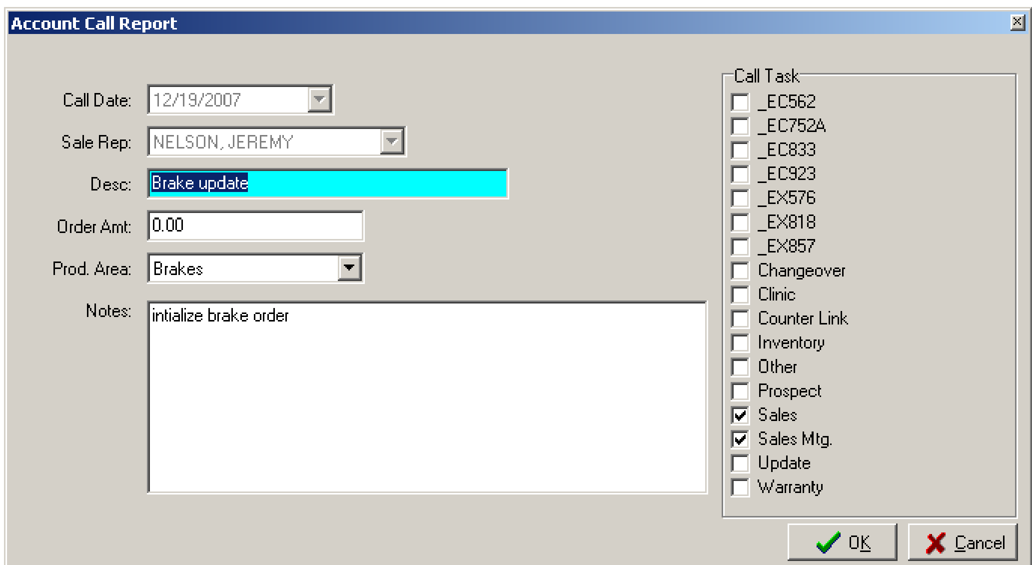
_EC562	_EC752A
_EC833	_EC923
_EX576	_EX818
_EX857	Changeover
Clinic	Counter Link
Inventory	Other
Prospect	Sales
Sales Marketing	Update
Warranty	

14.4 CHANGE AN ACCOUNT CALL RECORD

You are allowed to make changes to a call record as long as the call record was one that you created. You cannot change a call record for someone else.

1. To change an existing call, either *double-click* on the call in the Call History grid or *click* on the change button.

2. The Account Call Report window opens. The window is divided into 2 areas: Information and Call Task. See which fields you may change on the next page.



3. After entering information into the fields in the information area and the appropriate checkboxes in the Call Task area, *click* the OK button.
4. The call record changes are added to the Call History grid.

Information Area

In the information area, you have several fields to enter information. All fields are required except the Notes field.

The Call Date may not be changed.

The Sales Rep field defaults to you. It cannot be changed.

Use the Desc field to briefly describe the results and/or purpose of the call.

Use the Order Amt field to enter in a dollar amount that was ordered. If no dollar amount applies to this call, then leave the amount as zero.

In the Prod Area field, *click* the down arrow to bring up a list of the product areas currently available. (This list may change.)

Bearings & Seals	Brakes
Chassis & Driveline	Engine
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Enter into the Notes area any additional notes that would be helpful.

Call Task Area

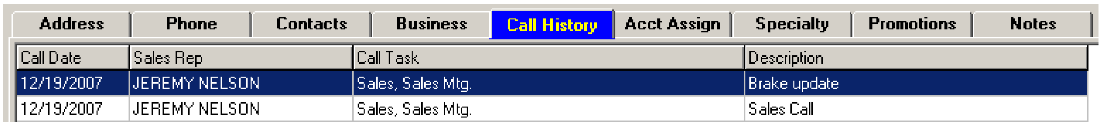
The Call Task field allows you to associate one or more call tasks with the current call. *Click* the checkbox next to all the events that apply to this call that are currently available. (This list may change.)

_EC562	_EC752A
_EC833	_EC923
_EX576	_EX818
_EX857	Changeover
Clinic	Counter Link
Inventory	Other
Prospect	Sales
Sales Marketing	Update
Warranty	

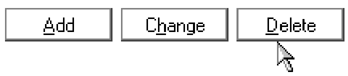
14.5 DELETE AN ACCOUNT CALL RECORD

Sometimes an account call needs so many changes that it would be easier just to delete the call record and start over. For that situation, you have the Delete Call History Record feature.

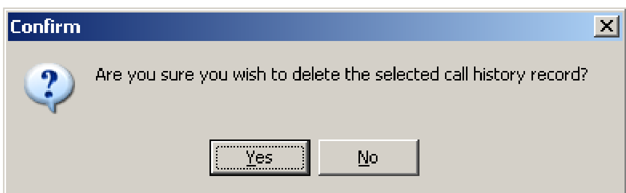
1. To delete an existing account call record, highlight the line in the Call History grid.



2. *Click* on the Delete button located at the bottom left side of the Call History Tab.



3. The Confirm Window opens. The system asks you to verify that "Are you sure you wish to delete the selected call history record?"



4. *Click* the Yes button to verify that you wish to delete the call record.
5. The call history record is removed from the Call History Tab.

NOTE: You cannot delete someone else's call history.