Call.It

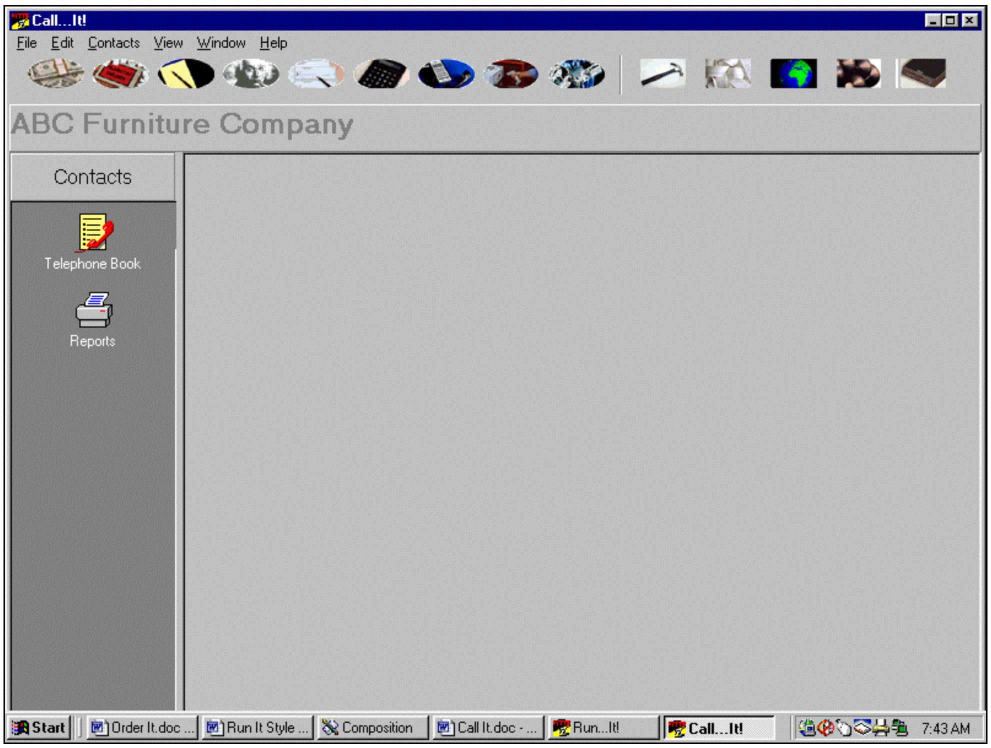
The Run.It Contact Management Module

This module is used to keep track of information on all contacts. Although the phone book is also found in Order.It and Pay.It, only Call.It provides the invaluable option of contact reports. These reports allow you to print out phone and address information on any group of your contacts. You can also print out mailing labels.

NOTE
The Call.It module is setup during the initial Run.It installation process.

Accessing the Call.It Module

1. Launch Run…It and, from the main Run.It window, select the **Call.It** icon.
2. In the Login dialog box, enter your User Name and Password, and select **OK**. The main Call.It window is displayed.

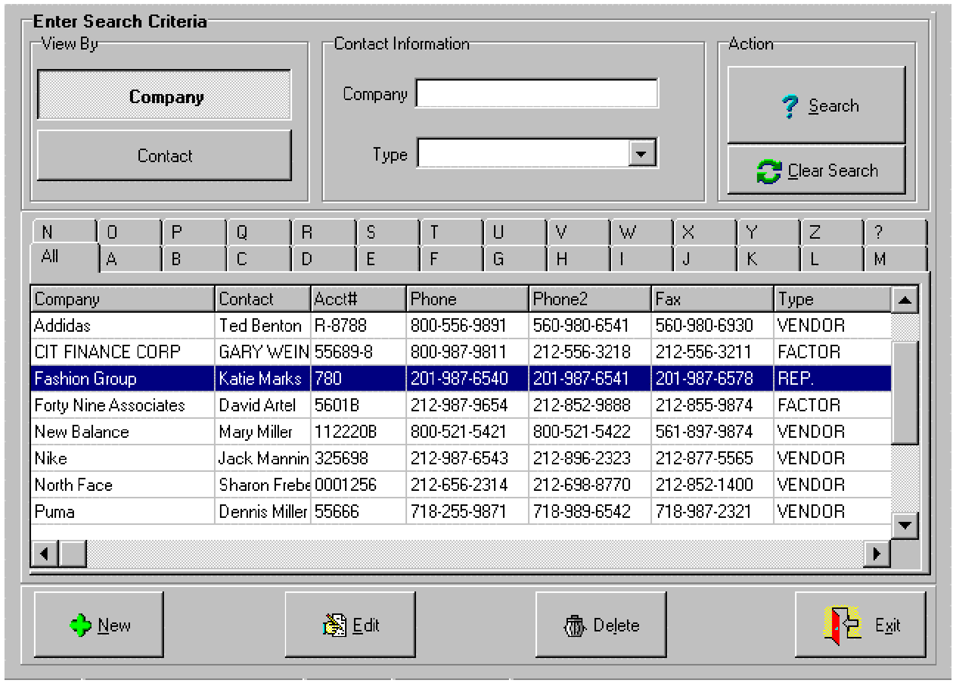


Contacts

Vendor Phone book

The phone book is used to keep track of phone, address and business information for contacts. You can enter company and contact information separately.

1. From the Call.It menu, select **Contact, Vendor Phone Book**. The Contacts window displays.



   – To sort the listings, select the **Company** or **Contact** button.

   – To view the listings by alphabetic letter, select the letter from the tabs shown.

2. To search for a company by name or type, do one or both of the following:

   – In the *Company* field, enter the company name.

   – In the *Type* field, click the drop-down list, and select a type (e.g., Rep., Vendor) from the choices shown.

   – Select the **Search** button.

3. From this window, you can also perform the following tasks:

   – Enter a new company and contact information by selecting **New**. *Refer to the instructions entitled, "Entering New Contacts."*

   – Change the existing company contact information by highlighting the record you want to change, and selecting Edit.

   – Remove an existing contact by highlighting the record in the list, and selecting **Delete**.

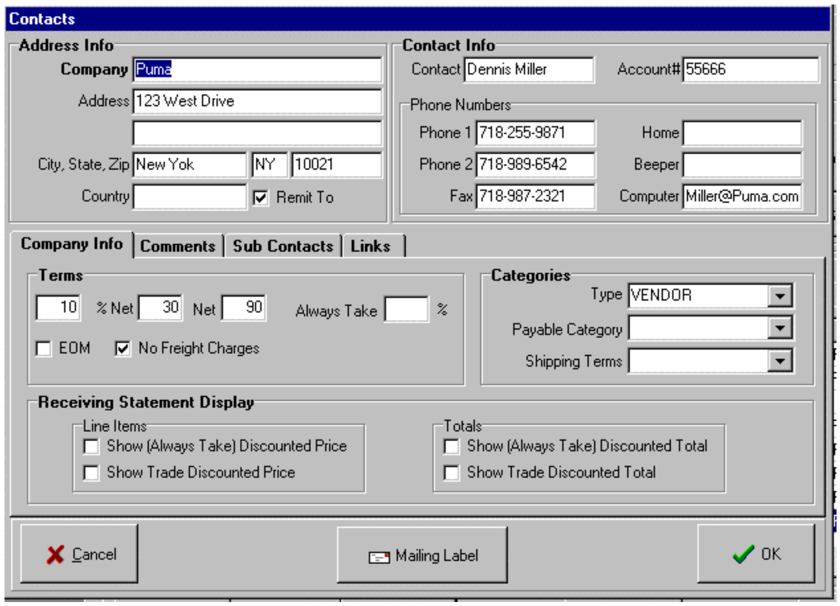
   – Close/exit the window by selecting **Exit**.

Contacts

1. Enter your account number with this company and the name of your primary contact.
2. Enter this company's discount terms.
3. Select the Type for this company (ex. Rep., Vendor, Personal, Utility).
4. If you are going to make payables for this contact, you MUST select **Remit To** for the contact.
5. When all selections/entries are made, select **OK**.

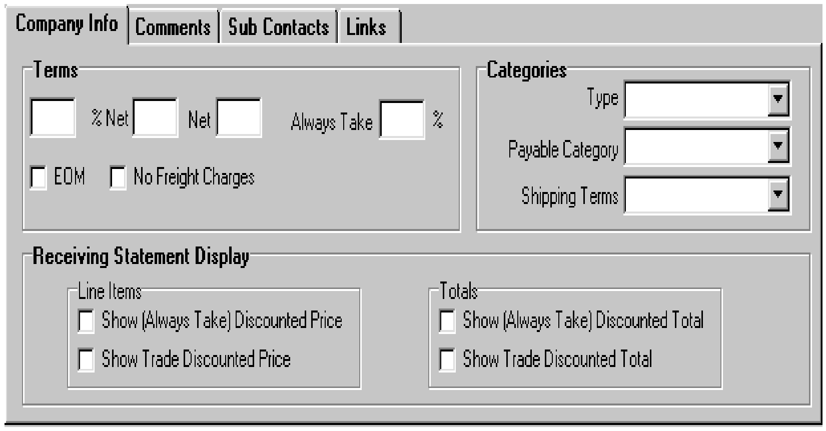
Entering New Contacts

1. From the Call…It window, move to the menu bar and select **Contacts, Vendor Phone Book**. The Enter Search Criteria window is displayed.
2. Move to the bottom of the window, and select **New**.



FIELD	DESCRIPTION
Address Info	**Address Info.** Enter the address information for this company. This is the vendor address used when creating a Purchase Order and is Payable address if **Remit To** is selected.
Remit To	Select **Remit To** if you are using the Payable module and this company issuing payables to this company
Contact Info	Enter the main contact person for this vendor • Account # • Phone #s. Fax, Beeper, Email (computer)

Company Info Tab

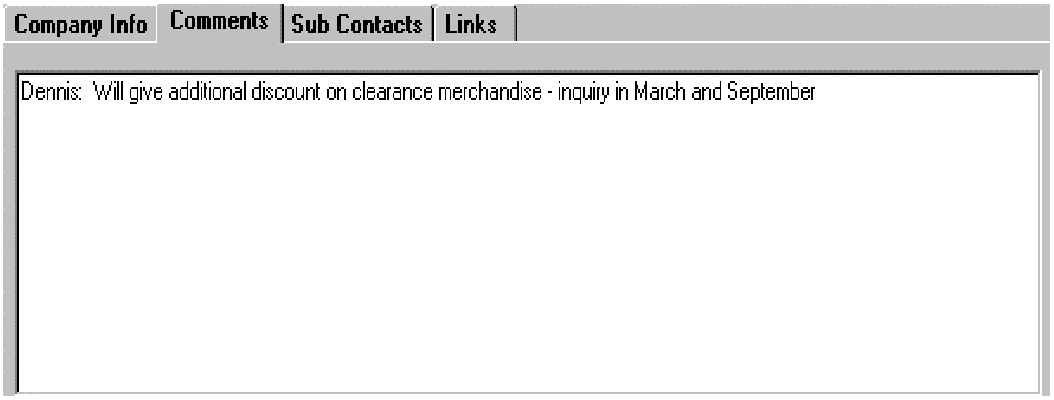


FIELD	DESCRIPTION
Terms	Enter the applicable terms for this vendor:
%	• Enter % deducted if paid prior to 1st Net date
Net (1)	• Net(1) the due date to earn the discount
Net (2)	• Net (2) the due date to pay invoice
Always Take_%	• Enter the **Always Take_%** to have an additional discount % applied regardless of terms
EOM	• Select EOM if this company's bills are always due the following month on a particular day of the month—e.g., on the 20th. EOM cut off day is set in File, Options.
No Freight Charges	• Select this option if this company does not charge freight charges. Upon selecting this option, you are not able to enter freight charges on this company's payables.
Type	Click the drop-down list arrow, and select the applicable type from those shown. By default, *Rep* and *Vendor* are already given as options. The Phone Book is already set up with two types—*Rep* and *Vendor*. If you plan to use this company as a vendor for purchase orders, you MUST select *Vendor* for its type. If you plan to use this company as a sales representative for purchase orders you must choose Rep. for the type.
Payable Category	Select the drop-down list arrow, and select the desired category from those shown. The default category is that which was setup through the File, Options. The default payable category that is selected here only applies to payables created in Pay.It The default category for payables created from PO receiving is always Merchandise.
Shipping Terms	Click the drop-down list arrow to display available shipping terms—e.g., COD, etc. This is only used for tracking, and appears on the Purchase Order Header of any PO's from this company.

Receiving Statement Display	Allows you to include additional information that will be printed on receiving statements from this company's purchase orders. These additional items provide you with a better view of how much you save from discounts. You can include one, some, or all of the available options on receiving statements. **Line Items—Show (Always Take) Discounted Price.** When this option is selected, each line item printed on the receiving statement includes the discounted price if the invoice is paid after its due date. If this PO does not include an Always Take discount, then the discounted cost is the same as the Cost. **Line Items—Show Trade Discounted Price.** When this option is selected, each line item printed on the receiving statement includes the additional discounted invoice price **Totals—Show (Always Take) Discounted Price.** This prints the Discounted Received at the bottom of the receiving statement, which is the effective total cost of the receiving if you pay the invoice AFTER its due date. If this PO does not include an Always Take discount, then the Discounted Received will be the same as the Total Received. **Totals—Show Trade Discounted Price.** This prints the additional discounted received at the bottom of the receiving statement, which is the effective total cost of the receiving..

Comment Tab

- Enter any comments you want to associate with this contact. Then, select the **OK** button.



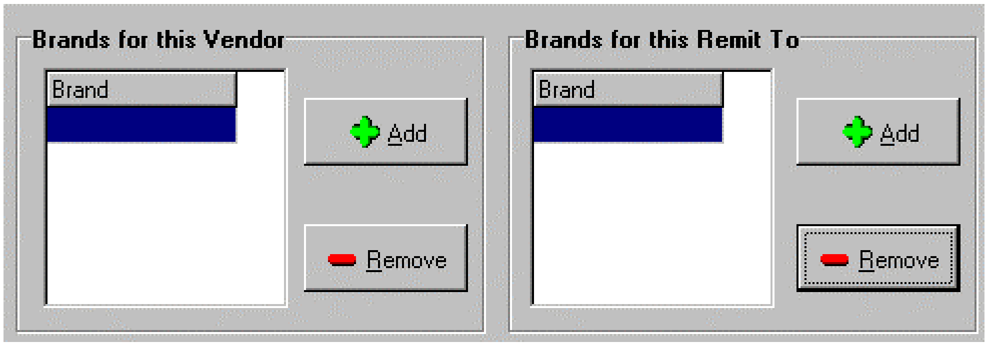
Sub Contacts Tab

Displays a list of all current subcontacts for this contact. These subcontacts are not listed in the main phone book, and are only viewable from the Contacts window of their related company.

FIELD	DESCRIPTION
New	Select **New** to add a New Sub Contact. Enter the sub contract information in the appropriate fields. When all selections/entries are made, select the **OK** button. When you return to the Sub Contacts tab, the Contact, Phone, Type, and Fax information are shown
Viewing/Editing	Select the sub contract you want to view or edit. Select **Ok** to save changes and return to Sub-contact window.
Delete	Highlight the sub contact you want to remove and select **Delete**
Mailing Label	**Select the type of mailing label and select OK**

Links Tab

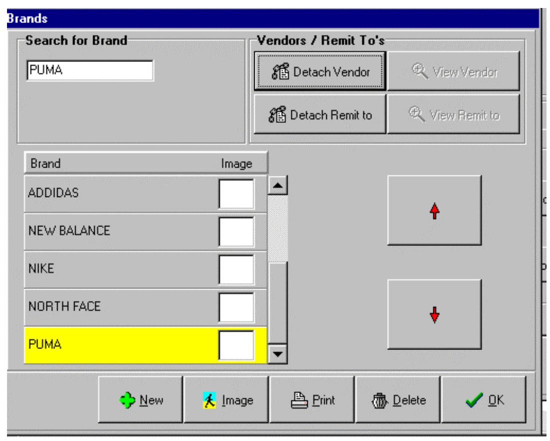
The Links tab shows the current *Brands for this Vendor* and *Brands for this Remit To* information.



Adding a Brand for this Vendor

1. On the Brands section of the Links tab select **Add**. The Brands dialog box is displayed.

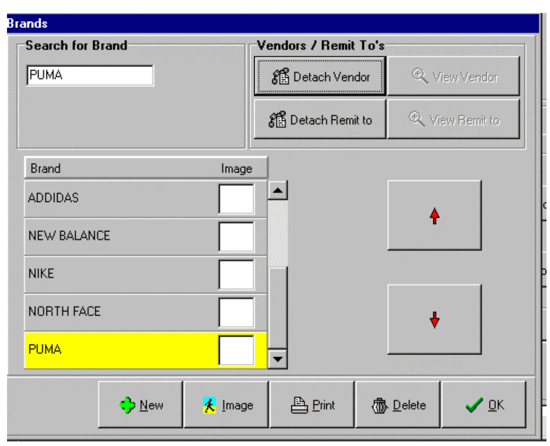
2. In the Search for Brand field, enter the brand you want to locate. A list of currently defined brands and/or their corresponding picture is displayed. To scroll through the list, using the **up/down** arrows. To add a new brand to the listing, select the **New** button, and complete the New Brand dialog box. Enter the Brand name and select **OK**



Adding a Brand to this Remit To

3. On the Remit To of the Links tab select **Add**. The Brands dialog box is displayed.

4. In the Search for Brand field, enter the brand you want to locate. A list of currently defined brands and/or their corresponding picture is displayed. To scroll through the list, using the **up/down** arrows. To add a new brand to the listing, select the **New** button, and complete the New Brand dialog box. Enter the Brand name and select **OK**

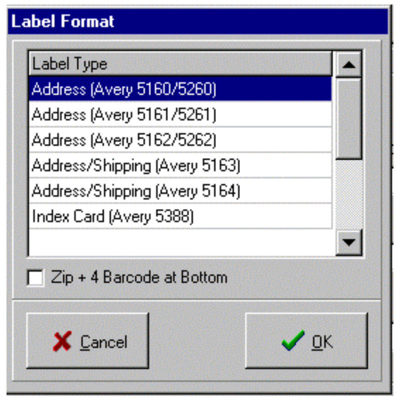


Contacts

Reports

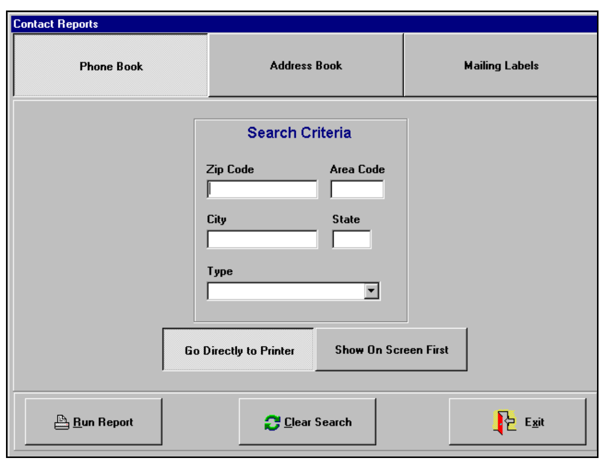
Contact Reports are very useful for printing information about your contacts. Contact Reports also allows you to print mailing labels for sending material to these contacts.

- **Phone Book.** This produces a list of companies with their contacts, phone and fax numbers and the Type of the contact.
- **Address Book.** This report produces a list almost identical to the Phone Book Report, but it also includes the primary company address and only lists one phone number.
- **Mailing Labels.** This prints mailing labels for the companies in your phone book. When you run this report, the Label Format window appears. Select the correct label type. You can also print the zip code barcode on the labels by selecting Zip + 4 Barcode at Bottom.



Printing Company and Mailing List Reports

1. From the Call.It menu, select **Contracts, Reports**.
2. In the Contact Reports dialog box, select the button (*Phone Book*, *Address Book*, *Mailing Labels*) of the type of report you want to produce. (By default, the *Phone Book* button is selected.)



3. Enter your search criteria in the appropriate fields.
4. Select either **Go Directly to Printer** or **Show on Window First**.
   - *Go Directly to Printer* immediately prints the report upon selecting Run Report.
   - *Show on Screen First* displays the report on screen. Select the **Printer** button to print the report.

NOTE
This option only applies for Phone Book and Address Book Reports. Mailing Labels automatically print when you select **Run Report**.

5. Select **Run Report**.