Simple Customer Support ©

Introduction:

Chances are you have Customers (hopefully a lot of them). You probably also have Contacts with these customers. The contacts may be phone calls, emails, letters, or even face to face contacts. This program is intended to be an easy way to record customer information and your contacts with the customers. It is sold only as a site license – not individual per user licenses. . That means for one low price you can install the program on as many computers as you like at a single location. You can run the program on a server with multiple users accessing the same database, or you can install a copy for use by your sales department and another copy for your shipping and receiving department, and so on.

I have been developing and selling help desk software for use by IT Departments for several years, now. Many registered users wrote to tell me that they were using one or the other of my programs for non-IT, non Help Desk applications. They like the ease of use of the program, or the price or a combination of reasons. They just did not use portions of the program for recording and updating things like computer and software inventory.

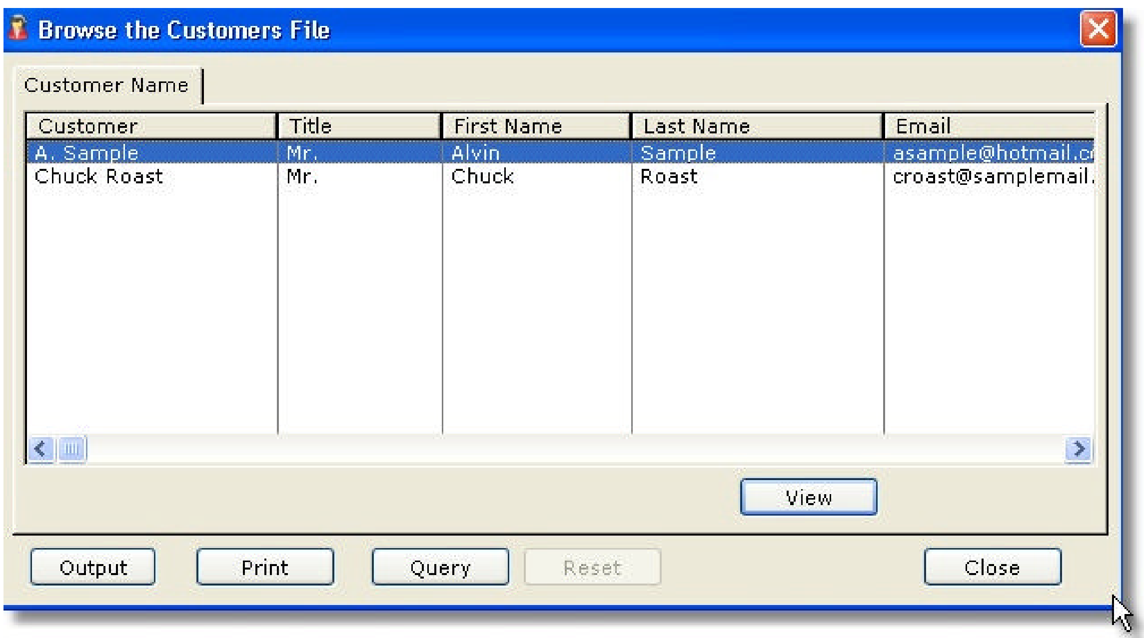
Simple Customer Support © is not a web based application. I do have a number of programs that do feature web front ends to a database. These can be found at my http://www.lnsoftware.com web site. This program is just a simple windows based application that allows for quick and easy recording, updating and reporting of customer information and customer contacts. It features user logins and security. This explains why when you first start the program you are presented with a login screen.

I have provided sample user accounts for your use. You may use the User ID of Admin and Password of admin for the ability to run all procedures in the program and to use the Security Menu options. You may use the User ID of csr and Password of csr to login as a customer service rep which will have some restrictions. You may login with the User ID of temp and password of temp to use the program in basically a “view” only mode. More on the security features later. Be aware that the User ID is not Case Sensitive, however; the password field is Case Sensitive. So if you entered CSR as the password for the provided CSR User ID, the password would be incorrect. It would need to be entered in Lower Case, as csr.

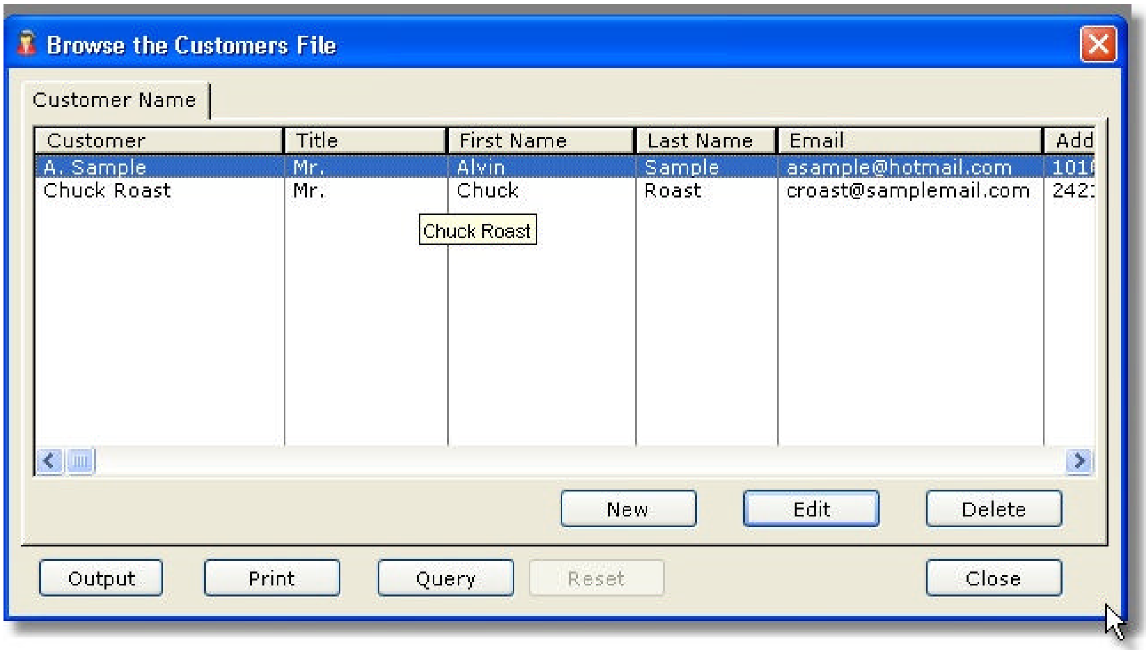
I have provided only a couple of sample customers and contact records. Utility options allow for importing this data from .csv (comma separated value) files. I have also included a zip code database table which may speed the entry of customer information.

Customer Information:

There are two main types of screens in the program. Browse style screens show many records at a time like a spreadsheet with rows and columns. The screen used to browse customer information is shown below.



I am logged in as a CSR with permission only to View customer data, not to add, edit or delete a customer record. So in the above screen shot there is a View button but not a button for Adding, Editing or Deleting a Customer record. The screen shot below is when logged in as a Supervisor or Administrator with different permissions.



By default, the customer browse screen is displayed sorted by the Customer field in ascending order. You can sort on a different column by clicking the column header. Click the same column header to reverse the sort order. In order to sort on more than one column hold down the CTRL key as you click additional column headers.

The button labeled “Output” at the lower left of the screen will create a Microsoft Excel formatted spreadsheet with all customer data as sorted and filtered if you have used the Query Wizard to limit the records displayed.

The button labeled “Print” will bring up a single page report of the selected customer record in Preview mode.

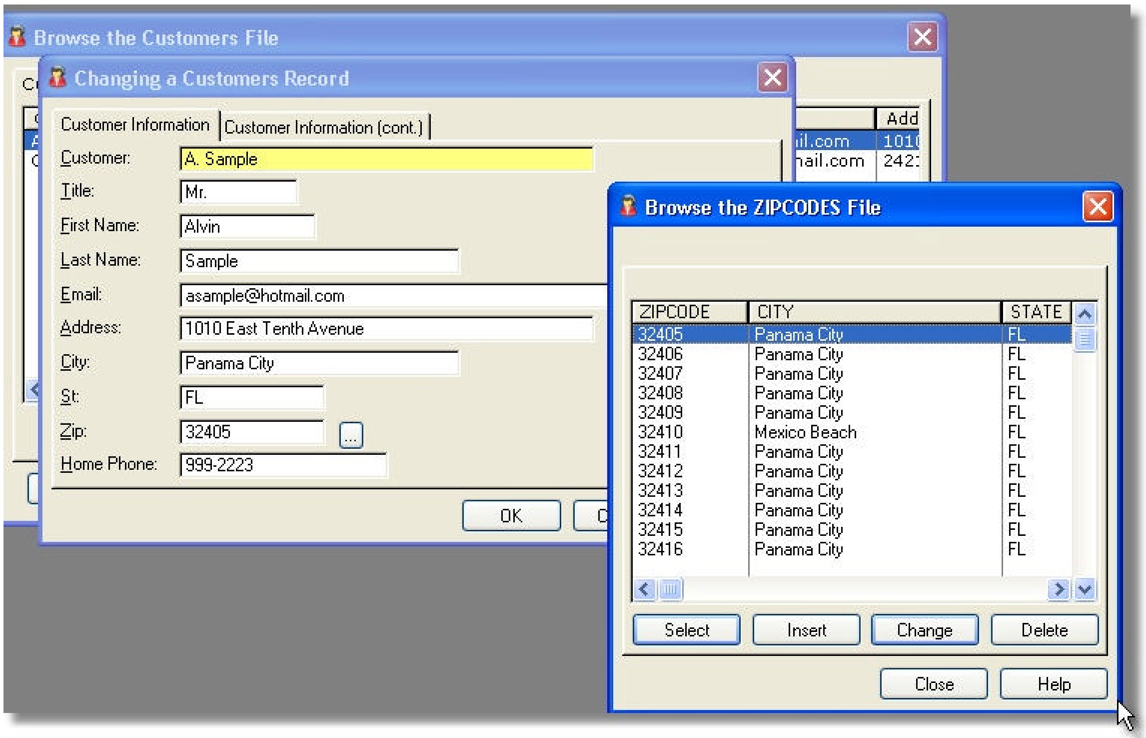
The Query button will call up the Query Wizard to let you create a Query to filter the data displayed. If a query is already in affect, you the button labeled “Reset” will be enabled and you can click it to remove the filter condition created with the Query Wizard.

The “New” button is used to bring up a form to add a new record. There are no default values for a customer record, and the only required field is the first – customer.

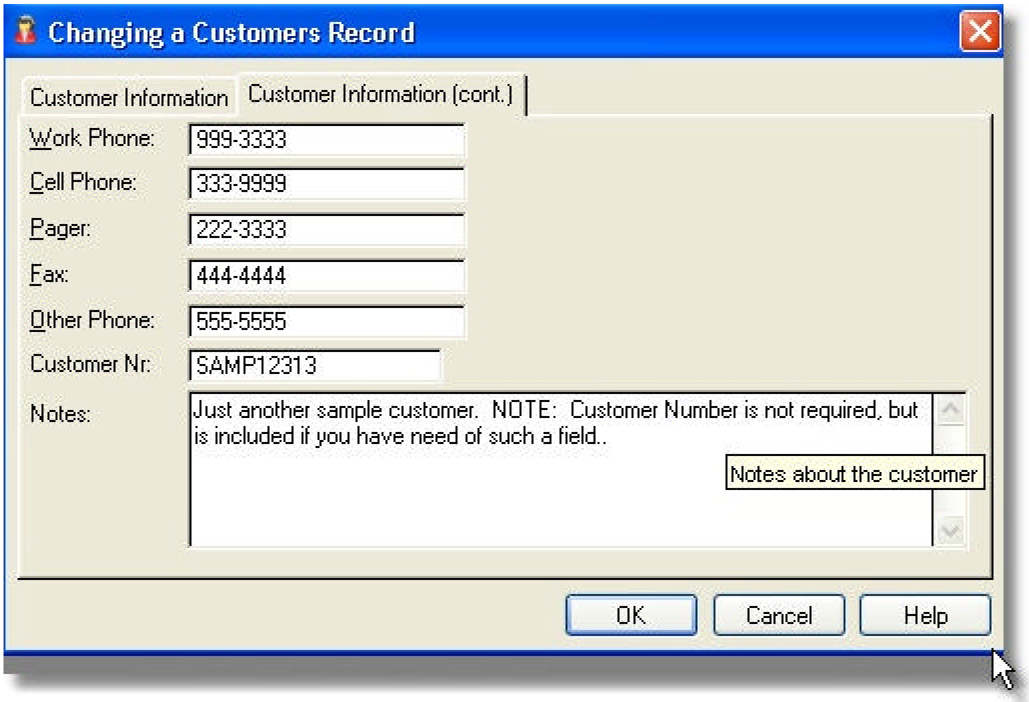
The button labeled “Edit” will bring up a form to let you edit the selected record and the “Delete” button will remove the selected record from the database.

You may find it convenient to use Keyboard keys rather than the mouse. The INSERT button will let you add a new record without clicking the New button with your mouse. The ENTER key will edit the selected record. The DELETE key on your keyboard will delete the selected record.

Adding/Changing Customer Information:



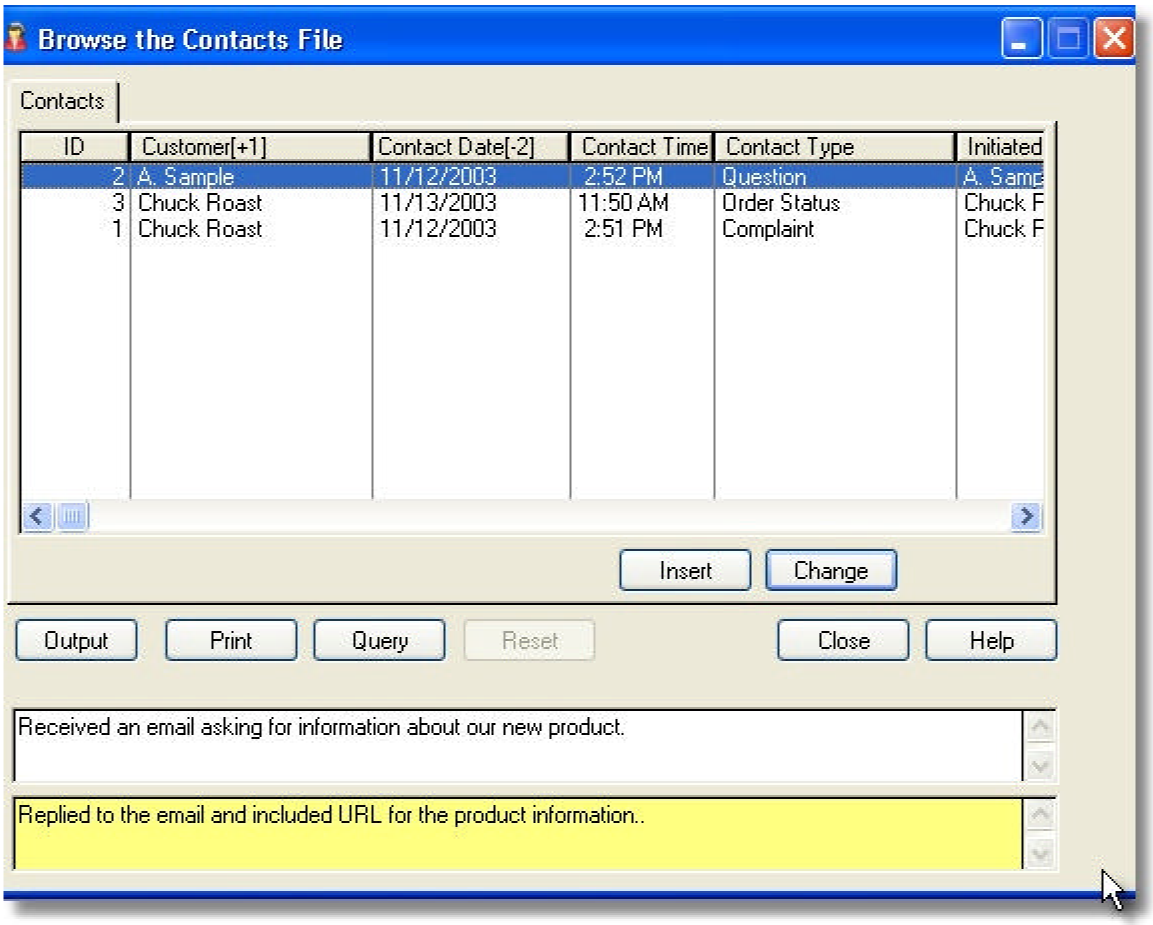
The screen above is used to update a customer record.
The only field that you absolutely must fill in is the first field – the customer name. It is possible that some organizations will use Simple Customer Support © for only their internal customers so they would not need to record all the other contact type information that is available on this screen. However, I expect most will want to record the customers other contact information. In order to speed data entry, I have provided a zip code database. If you click the … button next to the Zip code field, you can browse the zip codes table. As you begin typing 3 2 4 and so on, the screen will move to the closest matching zip code. When you have entered the zip code completely, you can click the Select button which will fill in the Zip Code as well as the corresponding City and State fields. A small convenience, but perhaps some will find this helpful.



The second notebook style tab on the Customer form will allow you to record additional phone numbers, as well as an optional Customer Number and any notes you may want to enter about a customer.

Customer Contact Information:

The screen below is the one you will use most often. It is used to view contact information in rows and columns like a spreadsheet.



By default, the Contacts browse screen is displayed sorted by the contact ID field in descending order. This ID number is a unique number, increased by one with each contact added to the database. You can sort on a different column by clicking the column header. Click the same column header to reverse the sort order. In order to sort on more than one column hold down the CTRL key as you click additional column headers.

The button labeled "Output" at the lower left of the screen will create a Microsoft Excel formatted spreadsheet with all contact data as sorted and filtered if you have used the Query Wizard to limit the records displayed.

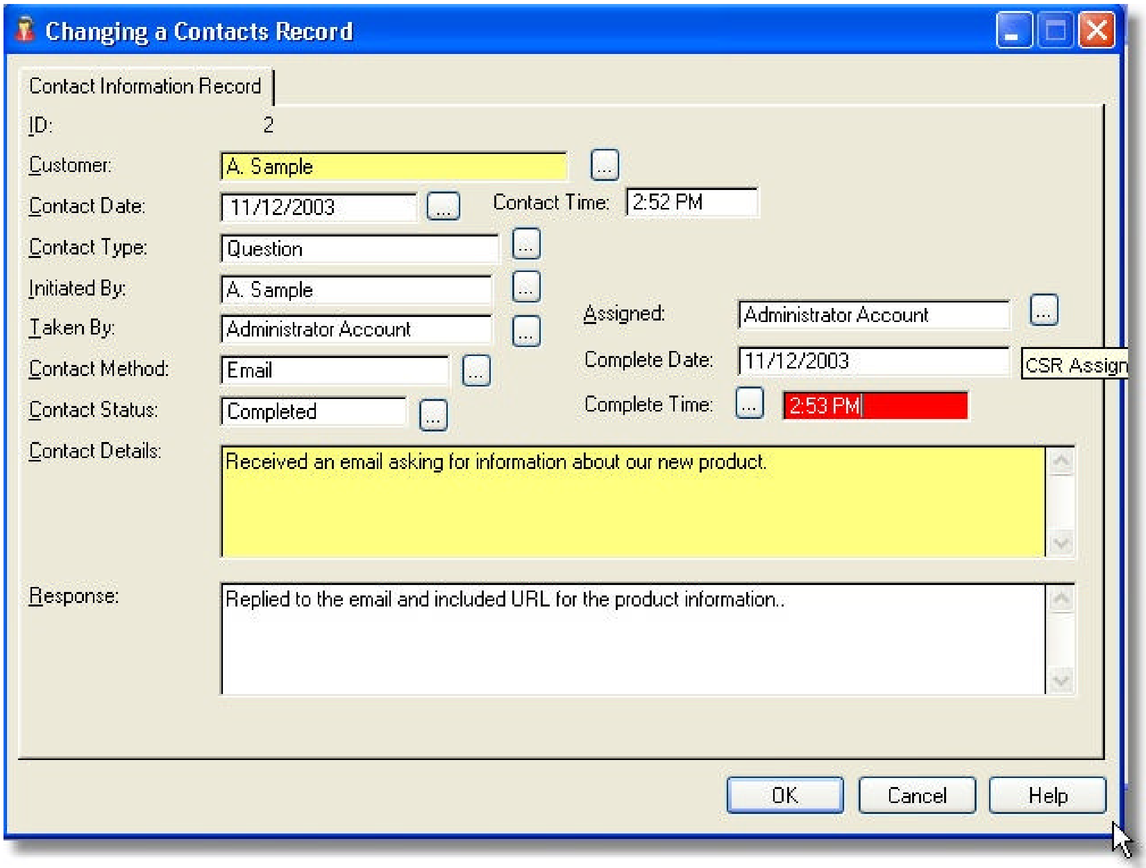
The button labeled "Print" will bring up a single page report of the selected contact record in Preview mode.

The Query button will call up the Query Wizard to let you create a Query to filter the data displayed. If a query is already in affect, you the button labeled “Reset” will be enabled and you can click it to remove the filter condition created with the Query Wizard.

The Close Button will obviously close the form and the button labeled Help will call up on line help.

Notice that there are two large squares on the screen beneath the buttons just described. The first block will display the details of the record currently selected in the browse screen and the second block will show the response – if any has been recorded for the selected contact record.

The “New” button is used to bring up a form to add a new record. Two fields, Customer and Contact Details are required fields. You will not be able to save a contact record if either of these two fields is left blank. Clicking the … button next to the customer field will let you quickly select the Customer name from a browse screen. When you select a customer, that customer name will be used to fill in the Initiated By field. In most cases, it is expected that the customer will have initiated a contact. However, if you (the CSR, initiate the contact you can select your name from the list by clicking the … button next to the Initiated By field. When you add a new contact record, the current date will be filled in automatically, as well as the current time. If needed, you can click the … button after the Contact Date and use the pop up calendar to select a different date. The Contact Type can be selected by clicking the … button next to the Contact Type. There is no default value for this field. The most common contact type will vary from organization to organization. Some examples are “Question”, “Order Status”, “Request”, “and RMA – Return to Manufacturer Authorization” and so on. Edit the lookup table for Contact Type to have values most common to your organization.



The “Taken By” field will by default be the Display Name of the currently logged in CSR. This can be changed by clicking the … button to select a CSR from the list.

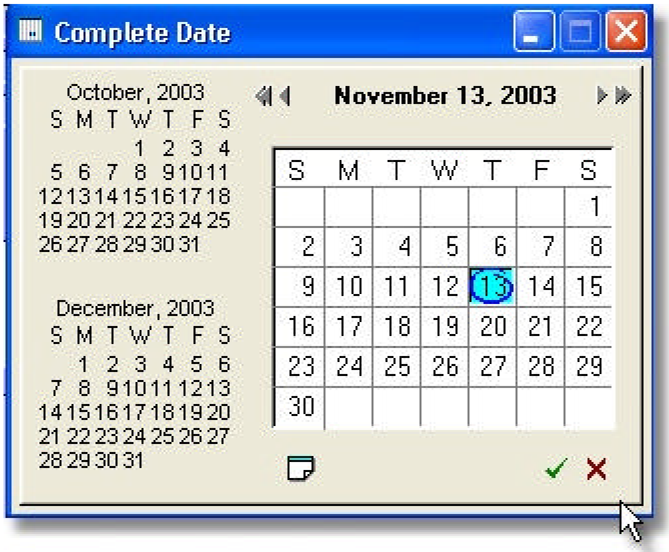
The Contact Method will default to “Phone Call”, however, you may have contacts with customers that are made by email, fax, or even in person. If the Contact Method is not Phone Call, just click the … button to choose the Contact Method from the list.

The Contact Status will default to “New” but you can change this value quickly by using the … button to list the Contact Status lookup table values.

The Contact Details section is where you would list the customers request or details of the contacts. Often, this will be something as simple as “Customer wanted to know when he/she would receive the product they ordered.” The next field is the Response to the Contact. This may again be something simple like “informed the customer of ETA for their order”.

An Assigned To field is provided if you need to indicate a CSR responsible for responding to a contact.

The Complete Date field can be entered quickly using the pop up calendar.



Click on the date and then click the check mark to close the calendar form. You can click the preceding month or next month to advance the calendar forward or backward. A double arrow moves back or forward by one year. A single arrow moves forward one month at a time. The picture of the calendar with the bottom right edge turned up will zoom to the current date.

Clicking the … button before the Complete Time will fill in the field with the current time based on the computer's system clock.

The button labeled "Edit" will bring up a form to let you edit the selected record and the "Delete" button will remove the selected record from the database.

You may find it convenient to use Keyboard keys rather than the mouse. The INSERT button will let you add a new record without clicking the New button with your mouse. The ENTER key will edit the selected record. The DELETE key on your keyboard will delete the selected record.

Lookup Tables:

In order to speed up data entry, and insure data is entered consistently when multiple users are sharing a database, I have included several look up tables. These tables contain values that are used frequently and can be accessed by clicking the … button next to fields that use a look up table. These tables are for Contact Types, Contact Method, Contact Status, and Customer Service Reps.

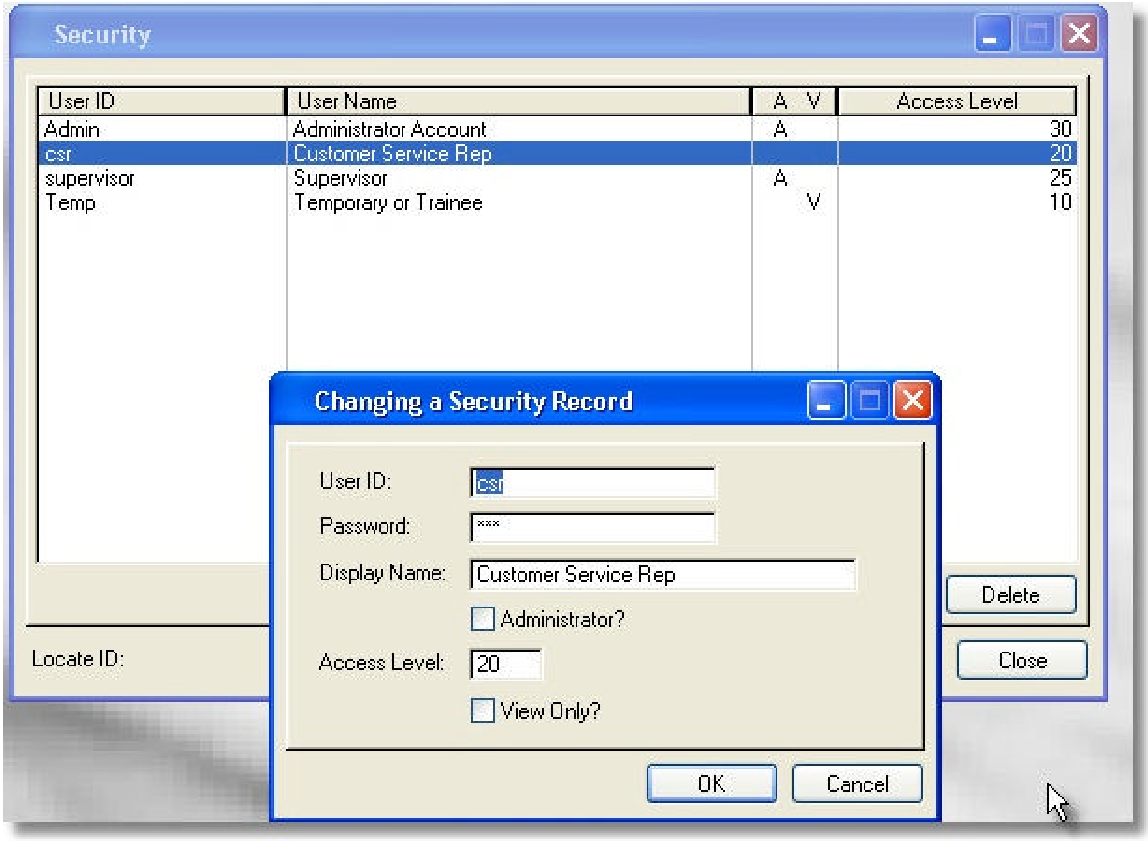
Reports:

I have provided a variety of reports which can be filter using the Query Wizard. These reports can all be previewed before printing and you can actually search the report for data and tag or un-tag pages to be printed. You can zoom in or out easily to view the reports.

In addition to these Standard reports, and the option on the Browse Customer and Browse Contacts screens to Output data to Microsoft Excel, I have also included a Custom Report Wizard to allow you to select the fields you want on a report and sort the fields as you want. These custom reports can also be filtered using the Query Wizard.
The custom reports created with the report wizard do have a limitation: if more than 8 lines would be required to display all the text in a long field, such as the Contact Details or Response fields, the data will be truncated. In other words in custom reports, data for wordy fields may not be printed, although all the text of these fields is displayed in the screens and standard reports. This is a limitation of the report wizard – the data is still in the database but may not be printed if too long for a custom report. Also, the custom reports wizard may not be able to fit all the columns you select in a report, even in landscape mode. The report wizard will notify you via message box if you have selected more fields than it can display on the report.

Security Options:

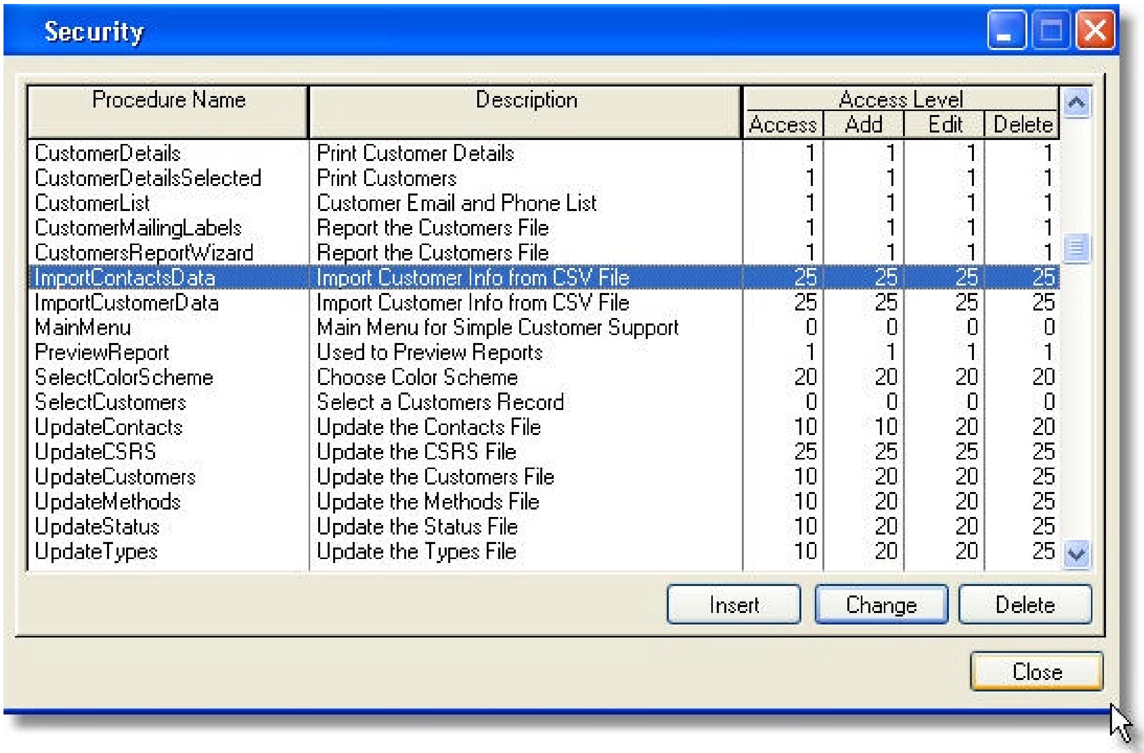
If using the program in shared mode on a server, you will likely have some users that you will want to restrict in some way. For example, you may not want your Customer Service Reps to be able to delete a customer record. You may have a receptionist or temporary employee who you would only want to be able to view records, but not update. You would want another person, perhaps yourself, to be able to access all tables and procedures and to administer the security for the program. This is all simple to do.



The screen above is for managing users and their access levels. When adding a user to the system, the User ID will default to 1. You may want to use something else, such as their first name, and maybe the first initial of their last name if you have more than one CSR with the same first name. The User ID field must be unique. The password is case sensitive. This is important! If you create a user and assign the password of "PASSWORD" then the use must not type "password" or "PassWord". They must type the password in the same case as when you created their account.

The Display Name may be the person's full name. This is the value that is entered automatically in the Taken By field.

The Administrator check box is what determines if a user can access the security menu options for creating and modifying user information and setting procedure access levels. If a person is designated as an Administrator he/she will be able to access these security options. However, even an Administrator cannot access any procedures for which his/her access level is lower than the access level required by the procedure. Similarly, if you check the view only box, no matter what a user's Access Level, they will not be able to add/edit/delete records.



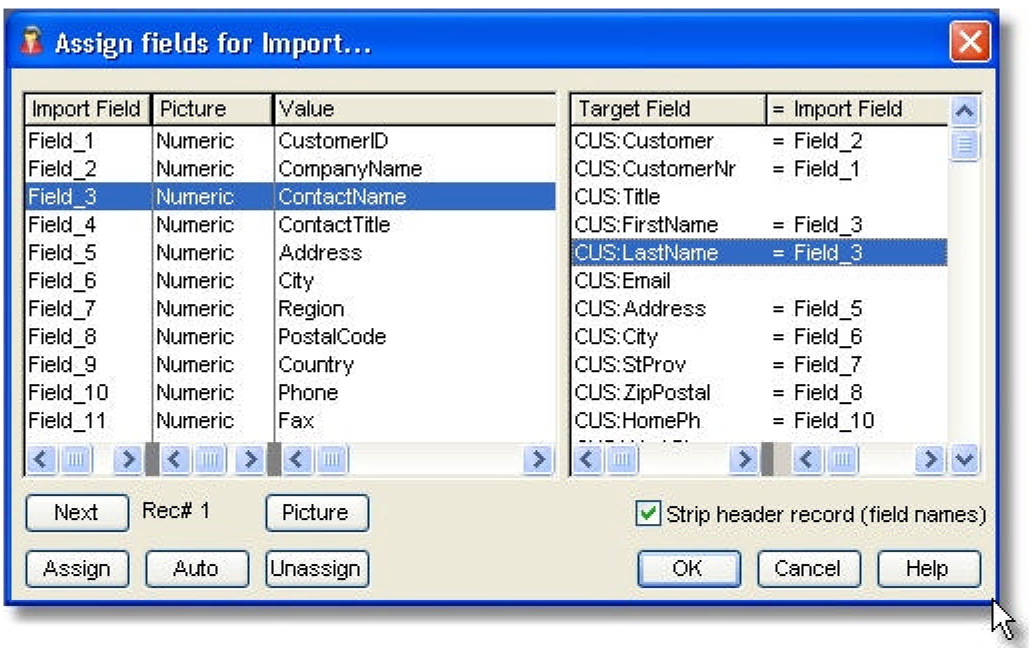
The screen above shows the procedure security settings. The important thing to understand is that if a user has a security level lower than that required by a procedure they will not be able to access the procedure, or may only view, add or edit as set up for the procedure. In the case of reports, and options like importing data, the important item is ACCESS, not Add/Edit or Delete. This is because if they can access a report that is all they can do – they can't add or delete a report anyway. However, in other cases like the lookup tables or updating customers or contacts, you may have a lower level set to allow a user to view (access) or add a record, but require a higher security level to edit or delete a record.

In the example above, I have set the Access Level for the procedure to update customer information as a 10, but a higher level (20) to Add or Edit a customer, and a higher level still to enable deleting a customer record.

Honestly, administering user and procedure security is really, well, simple, using Simple Customer Support ©.

Importing Data from CSV Files:

I have provided options under the utility menu to allow you to import data from CSV (comma separated value) files for both Customer and Contacts. Importing customer data is just a matter of browsing to the location of the .csv formatted file with your data you want to import, then select a field from your source file on the left side column, clicking on a corresponding column in the right side column and clicking the "assign" button to assign the field to the import field. NOTE: You can assign a field from your .csv file to more than one field if you need to do so.



The process for importing customer data is the same, however, in the case of "date" field types you will need to click the Picture button and use a formatting picture that matches you .csv data. If you do not do this you will get some unexpected and undesirable data from your import. Below are picture formats for some common date type fields.

@D1	mm/dd/yy	10/31/59
@D01	mm/dd/yy	01/01/95
@D2	mm/dd/yyyy	10/31/1959
@D3	mmm dd, yyyy	OCT 31,1959
@D4	mmmmmmmmm dd, yyyy	October 31, 1959

@D5	dd/mm/yy	31/10/59
@D6	dd/mm/yyyy	31/10/1959
@D7	dd mmm yy	31 OCT 59
@D8	dd mmm yyyy	31 OCT 1959
@D9	yy/mm/dd	59/10/31
@D10	yyyy/mm/dd	1959/10/31
@D11	yymmdd	591031
@D12	yyyymmdd	19591031

So, for example, if you look at your .csv file and the dates are formatted like 10/31/1959 you wanted to click the picture button and use the format @d2

NOTE: Before importing data you may want to make a copy of the contacts.tps file. That way if you encounter problems with an import you can always replace your contacts.tps with the one you backed up. It is a good idea to make frequent backup of your data files, anyway. They all end with .tps as the filename extension.

Installation:

If you accept the default installation prompts, a directory will be created on your C: drive named "simple" and all the needed files will be installed to that directory. The data files (they all end with .tps) will be updated based on the START IN property of the shortcut(s) created by the installation program. Now, if you are going to be using the program in shared mode on a network server you would not want to install to C: drive. Instead you would want to install to a "mapped" drive letter pointing to a folder or directory on the server. So, for example, if you have a folder named public on your server and have this mapped as drive letter "P" during the installation, you would change from C:\Simple to P:\Public\Simple as the destination for the installation. You might "map" a drive letter to a "root" rather than folder or subdirectory and in that case you would choose P:\Simple as the destination directory. You would repeat the process for each person that would be running the program from the same folder. (NOTE: Be sure no one is running the program when installing for multiple uses. If the program were running during installation on other workstations you would get error message about files in use during the installation. You could ignore the errors, since the files being installed already exist, but it is best to not have anyone using the program during additional installations.)

If you don't understand what I mean by mapping a drive letter, either ask your network administrator or send an email to me at dennis@lnsoftware.com

Technical Support:
Technical support is Free, however, it is limited to email. If you have questions, problems or comments on the program, please write to me at dennis@lnsoftware.com or dennis@dbandsons.com

Purchase your Site License:

This initial release is being offered at just $129 for a site license. That price is not expected to increase until the next version is available in 2004. If you purchase a site license for this 1.0 release, version upgrades are free. I generally use two registration services to accept orders – BMT Micro and Shareit.com – these companies only take orders they do not provide technical support. Technical support is free, but limited to email. You may email me at dennis@lnsoftware.com or dennis@dbandsons.com and I will try to respond promptly. You can help me by including the program name and version in the subject of your email. Please do not just put "Hi" in the subject line as you message may be filtered as Spam, even though it is a legitimate email.