



Contact Manager Manual

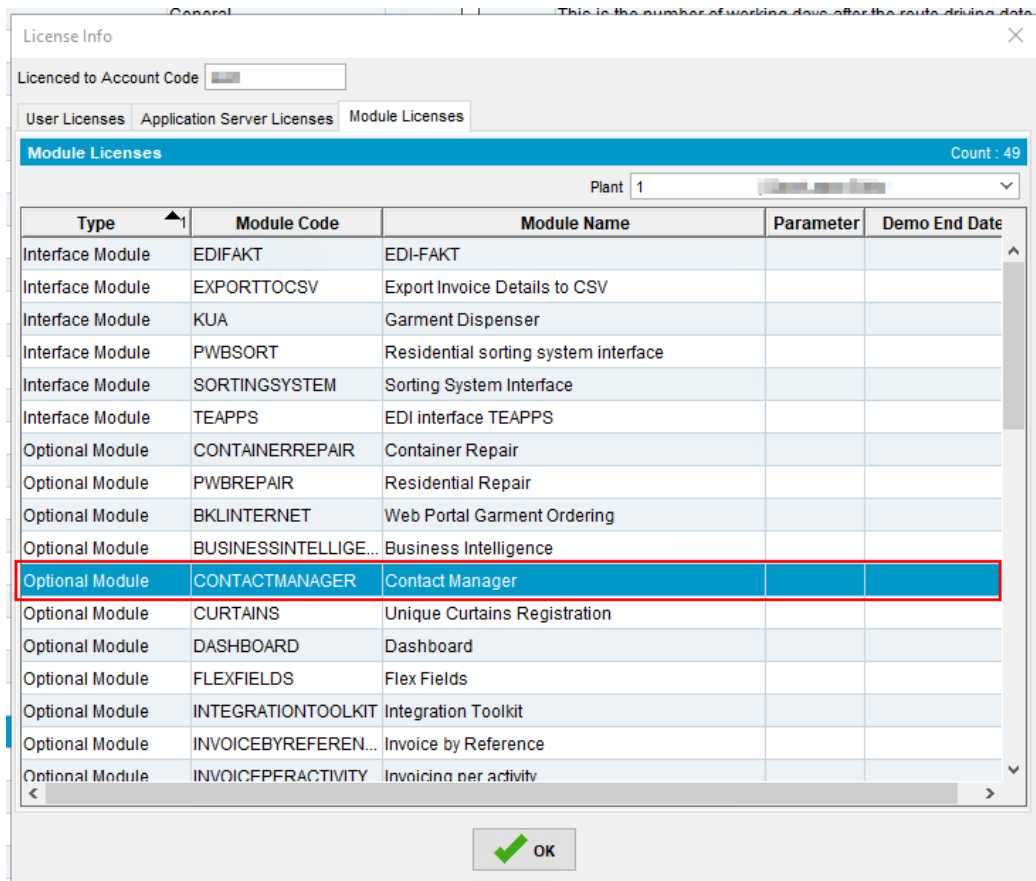


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1 Introduction

Add the Contact Manager module to the license file. This module is needed for the functionality that allows an authorized web user to create contacts via the web portal. Modules BKLINTERNET, LVMINTERNET or PWBINTERNET is active in the license.



1.1 System Settings

The system settings can be divided into settings group regarding the Contactmanager. The system settings for the contactmanager is mentioned below categorized in the ABSolute settingsgroups.

1.1.1 Settinggroup: E-Mail settings

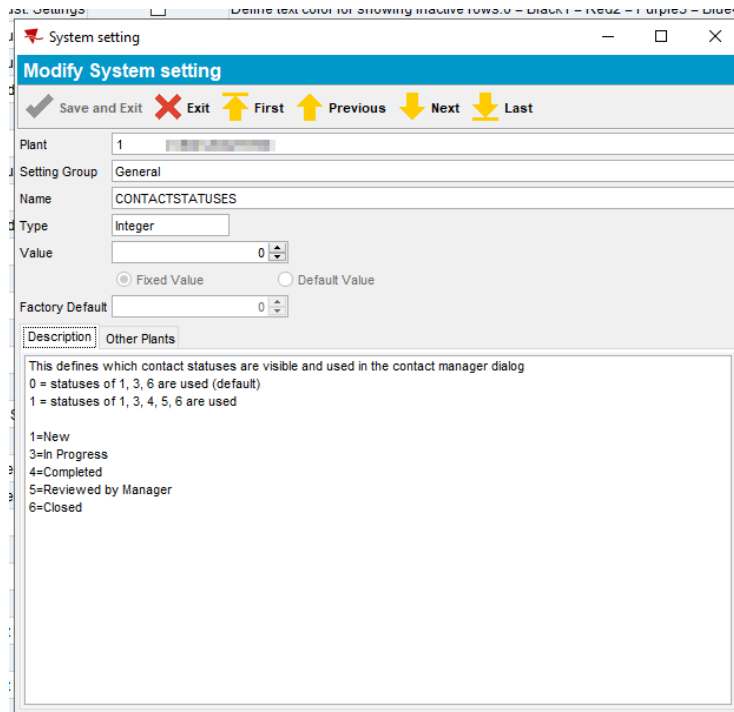
The settings MAILPORT, MAILUSERNAME, MAILUSERPASSWORD, SMTPSERVERNAME. Excluded in the manual.

MAILPORT	587	25	E-Mail settings	<input type="checkbox"/>	Defines the MAILPORT of the SMTP server address used to send emails with Invoices/Statements attached.
MAILUSERNAME	absolute	user	E-Mail settings	<input type="checkbox"/>	Username of the SMTP server used to send emails with Invoices/Statements attached.
MAILUSERPASSWORD	LaunDry\$SW	-	E-Mail settings	<input type="checkbox"/>	User password of the SMTP server used to send emails with Invoices/Statements attached.
SMTPSERVERNAME	mail-ams.internal.absits.com	mail.com	E-Mail settings	<input type="checkbox"/>	Defines the SMTP server address used to send emails with Invoices/Statements attached.

1.1.2 Settinggroup: General

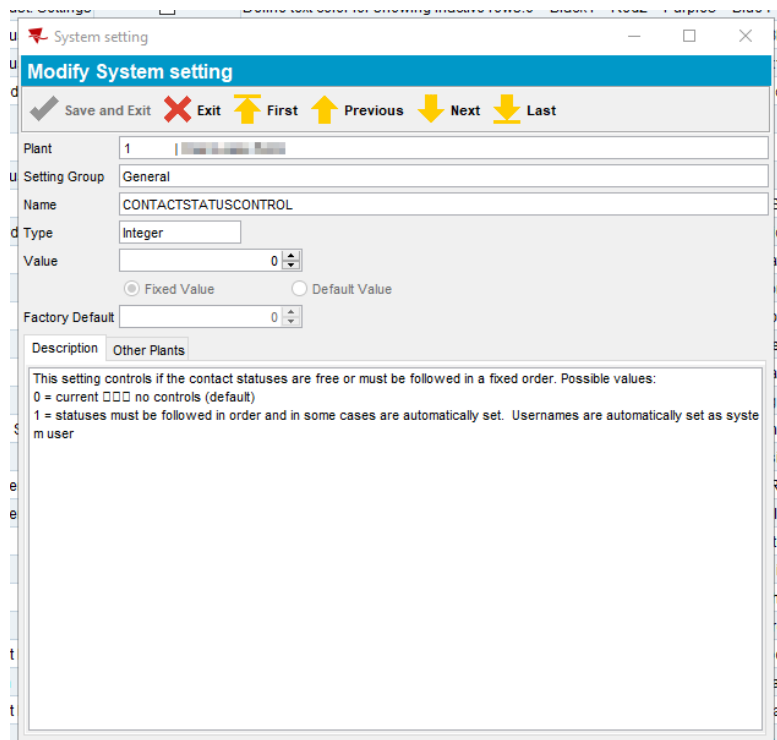
CONTACTSTATUSES

Defines if 3 or 5 status are used.



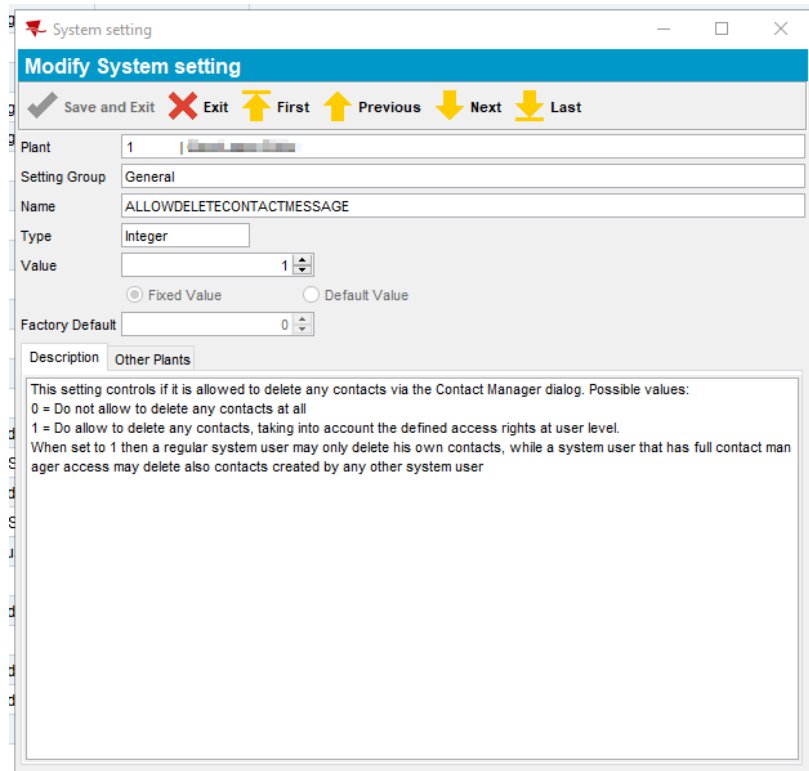
CONTACTSTATUSCONTROL.

Defines if the statuses used in fixed order or freely used.



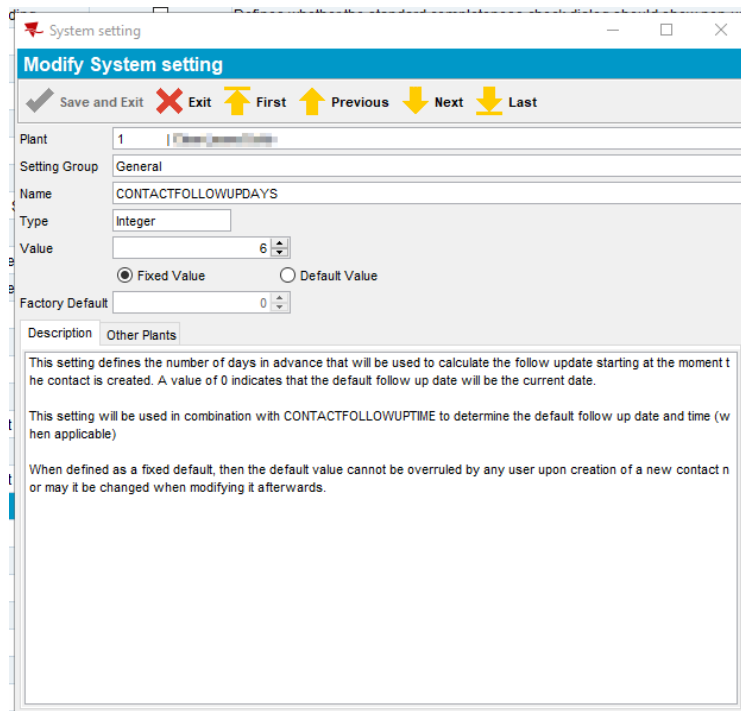
ALLOWDELETECONTACTMESSAGE

Defines if it is allowed to delete contact via Contact Manager Dialog.



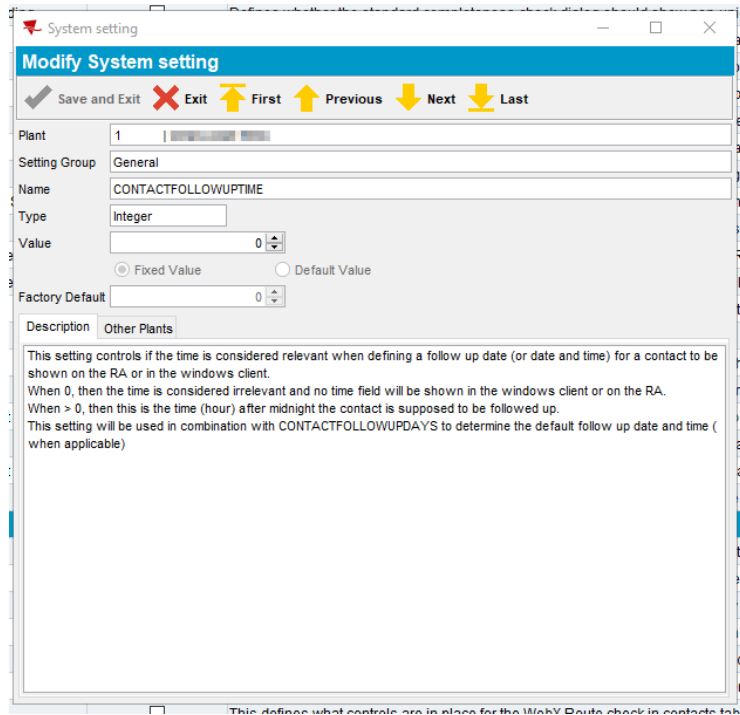
CONTACTFOLLOWUPDAYS

Defines the number of days in advance that will be used to calculate the follow up update after contact creation.



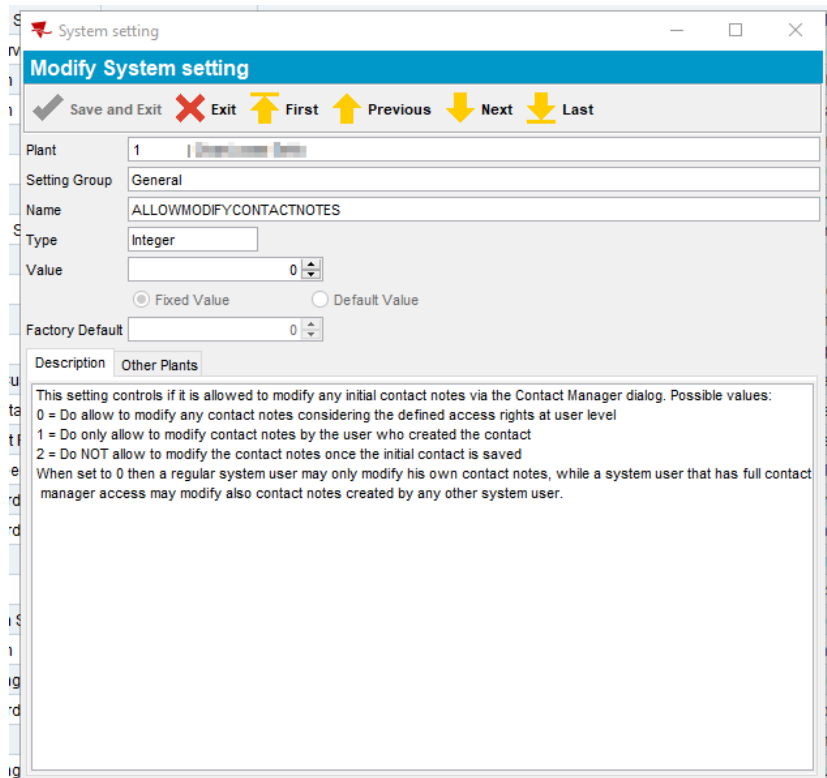
CONTACTFOLLOWUPTIME

Defines if the time is considered relevant when defining follow up date.



ALLOWMODIFYCONTACTNOTES

Defines if it is allowed to modify any initial contact note via Contact Manager dialog.

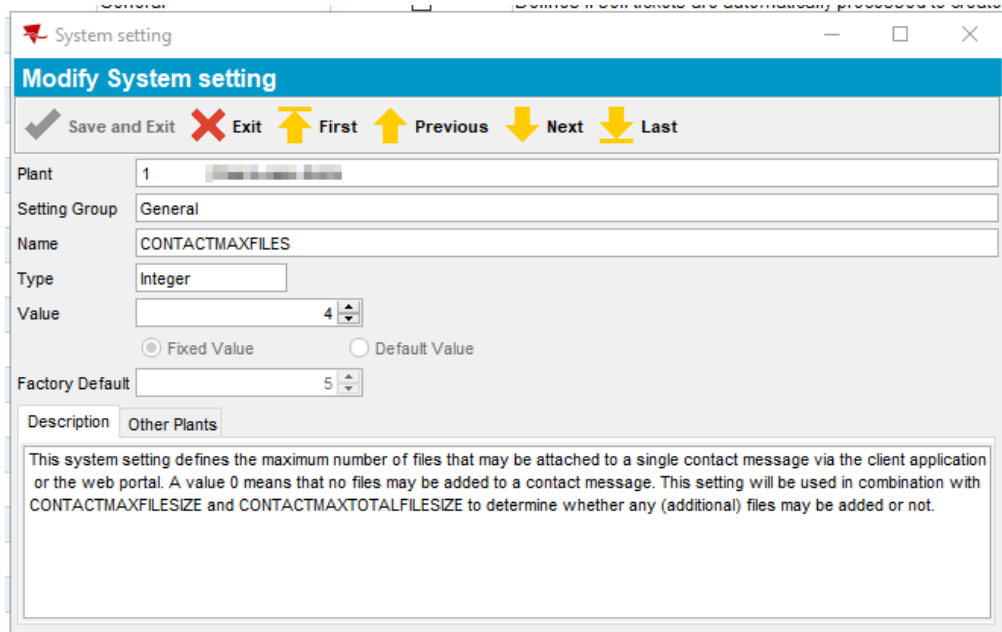


Attachments:

CONTACTMAXFILES	4	5	General
CONTACTMAXFILESIZE	2	20	General
CONTACTMAXTOTALFILESIZE	3	20	General

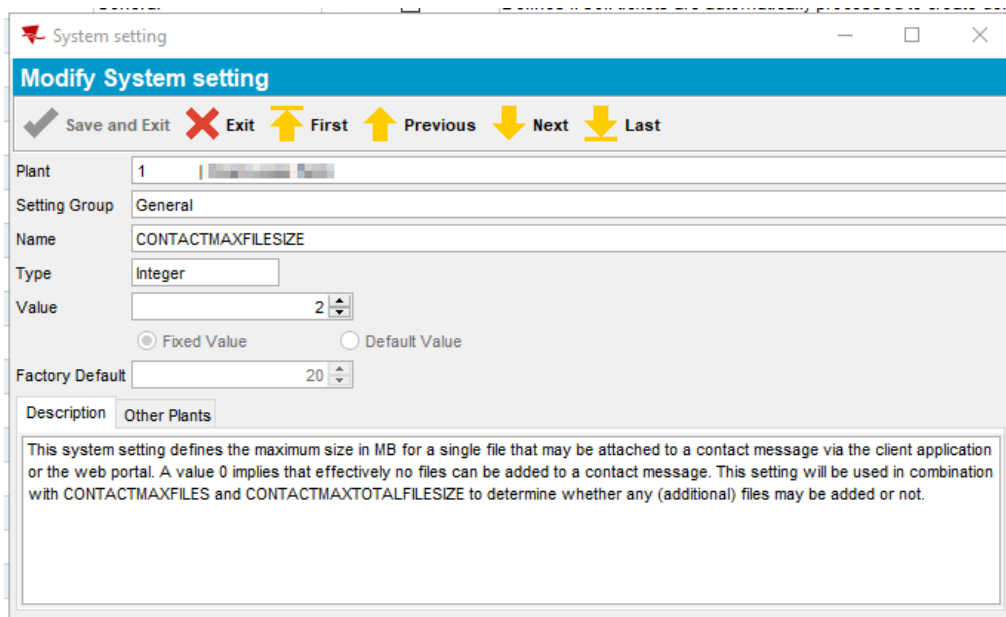
CONTACTMAXFILE

Defines the maximum number of files.



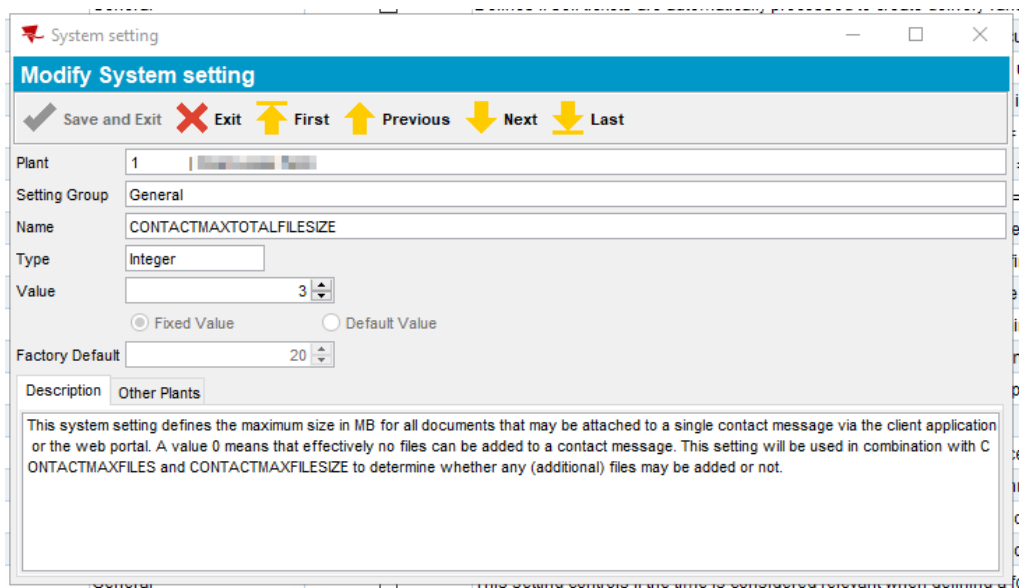
CONTACTMAXFILESIZE

Defines the maximum size for a single file.



CONTACTMAXTOTALFILESIZE

Defines the maximum size of all documents combined.



1.1.3 Settingsgroup: Route Assistant PDA

Excluded settings in this manual:

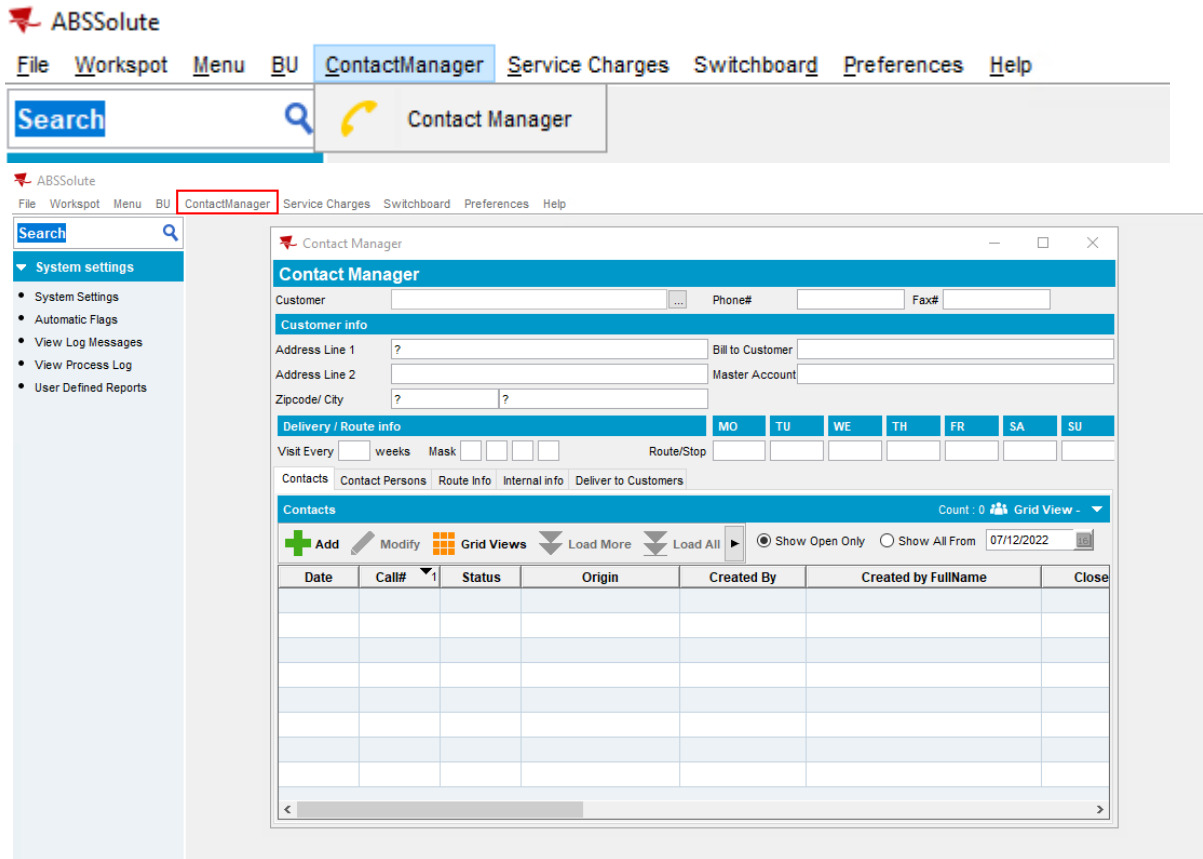
The PDA settings: CONTACTBLOCKSTOPDEPART, CONTACTCHECKROUTESTART

WebApplication: ABSWEBPORTALURL

2 ABSSolute



When the Module Contact Manager is in the license, the contacts can be accessed by the top bar – ContactManager – or by searching for the Contacts dialog.

Top bar: ContactManager




ABSSolute

File Workspot Menu BU **ContactManager** Service Charges Switchboard Preferences Help

Search   Contact Manager

ABSSolute

File Workspot Menu BU **ContactManager** Service Charges Switchboard Preferences Help

Search 

System settings

- System Settings
- Automatic Flags
- View Log Messages
- View Process Log
- User Defined Reports

Contact Manager

Customer Phone# Fax#

Customer info

Address Line 1 ? Bill to Customer

Address Line 2 Master Account


Zipcode/ City ? ?







Delivery / Route info

MO TU WE TH FR SA SU

Visit Every weeks Mask Route/Stop

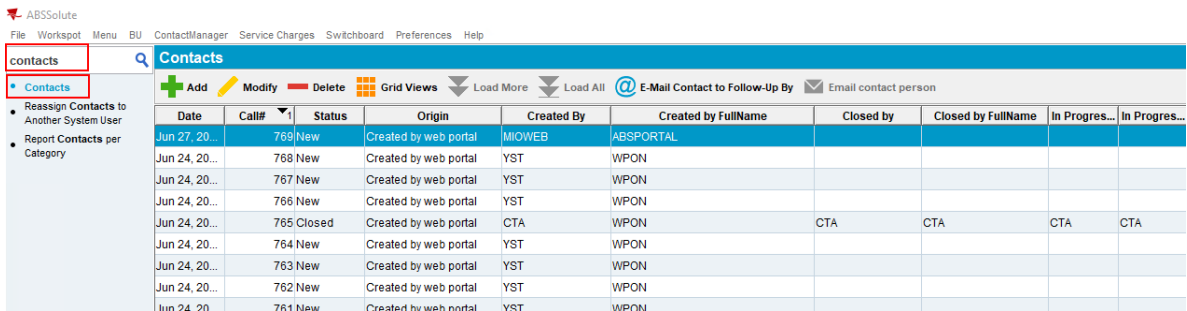
Contacts Contact Persons Route Info Internal info Deliver to Customers

Contacts Count : 0  Grid View -

     Show Open Only Show All From 07/12/2022 


Date	Call#	Status	Origin	Created By	Created by FullName	Close

Contacts dialog:











ABSSolute

File Workspot Menu BU **ContactManager** Service Charges Switchboard Preferences Help

contacts 

Contacts

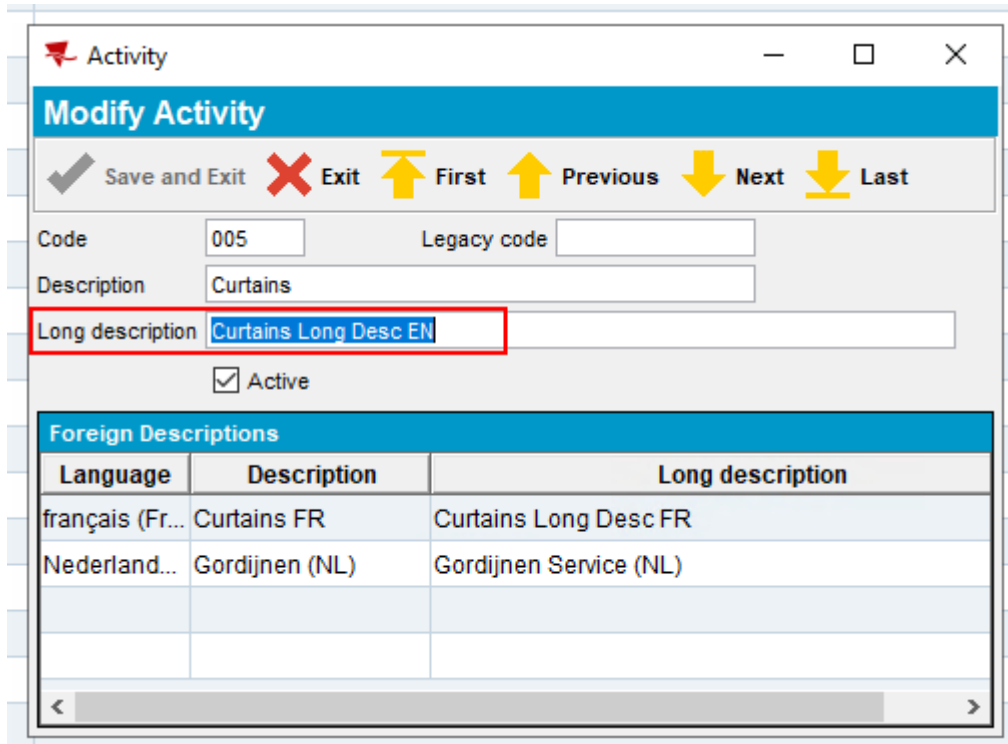
- Reassign Contacts to Another System User
- Report Contacts per Category

       E-Mail Contact to Follow-Up By  Email contact person

Date	Call#	Status	Origin	Created By	Created by FullName	Closed by	Closed by FullName	In Progress...	In Progress...
Jun 27, 20...	769	New	Created by web portal	MIOWEB	ABSPORTAL				
Jun 24, 20...	768	New	Created by web portal	YST	WPON				
Jun 24, 20...	767	New	Created by web portal	YST	WPON				
Jun 24, 20...	766	New	Created by web portal	YST	WPON				
Jun 24, 20...	765	Closed	Created by web portal	CTA	WPON	CTA	CTA	CTA	CTA
Jun 24, 20...	764	New	Created by web portal	YST	WPON				
Jun 24, 20...	763	New	Created by web portal	YST	WPON				
Jun 24, 20...	762	New	Created by web portal	YST	WPON				
Jun 24, 20...	761	New	Created by web portal	YST	WPON				

2.1 Activities

The Activities shown in “Activities” dialog can be selected in the Business Unit.



Modify Activity

Save and Exit Exit First Previous Next Last

Code: 005 Legacy code:

Description: Curtains

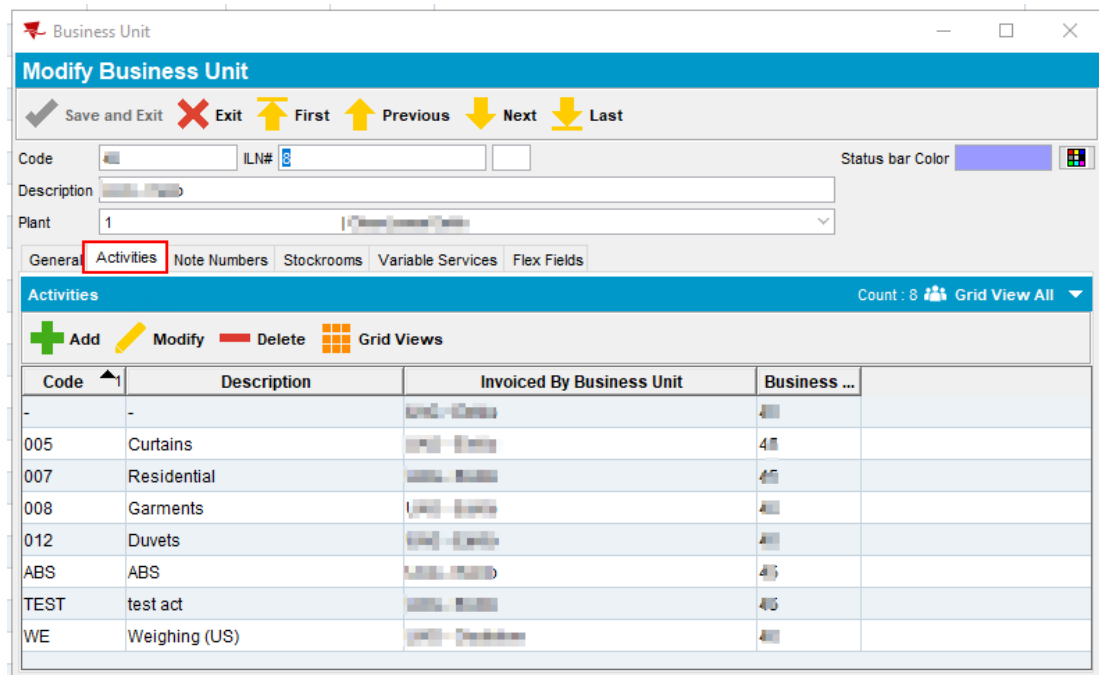
Long description: Curtains Long Desc EN

Active

Language	Description	Long description
français (Fr...	Curtains FR	Curtains Long Desc FR
Nederland...	Gordijnen (NL)	Gordijnen Service (NL)

2.2 Business Units

Activities needs to be known to select the Business Line on the Web Portal. Only the activities per customer are shown on the Web. See [Web Portal](#).



Modify Business Unit

Save and Exit Exit First Previous Next Last

Code: ILN#: Status bar Color:

Description:

Plant: 1 |

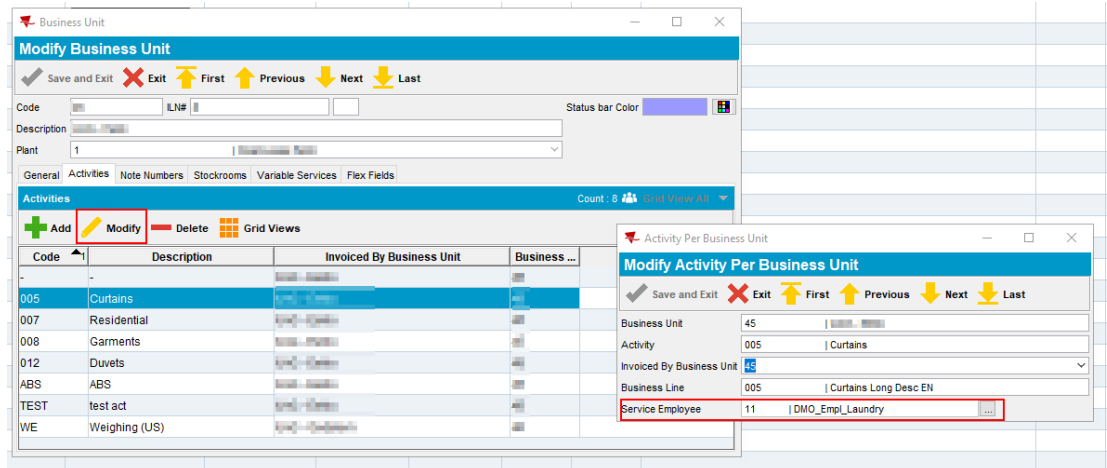
General **Activities** Note Numbers Stockrooms Variable Services Flex Fields

Activities Count: 8 Grid View All

+ Add Modify Delete Grid Views

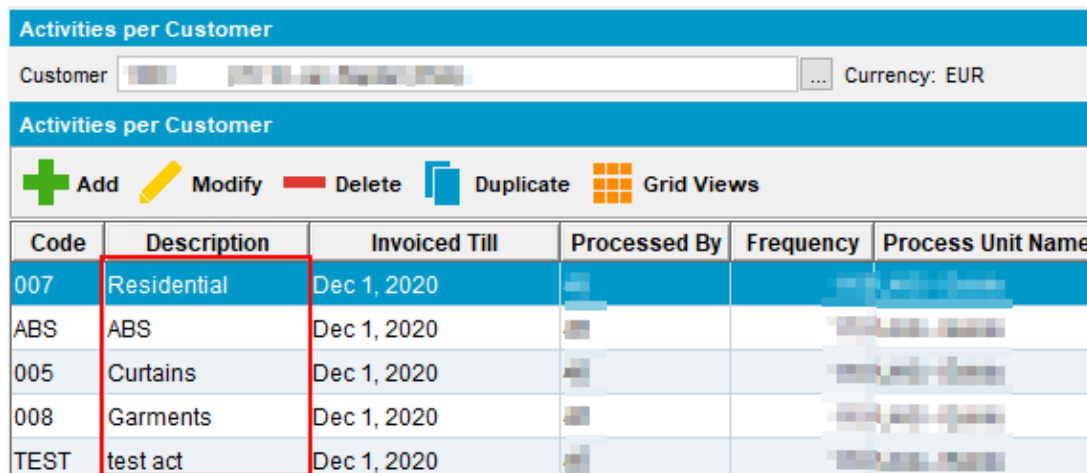
Code	Description	Invoiced By Business Unit	Business ...
-	-	ABS - Curtains	40
005	Curtains	ABS - Curtains	40
007	Residential	ABS - Curtains	40
008	Garments	ABS - Curtains	40
012	Duvets	ABS - Curtains	40
ABS	ABS	ABS - Curtains	40
TEST	test act	ABS - Curtains	40
WE	Weighing (US)	ABS - Curtains	40

A Service Employee needs to be defined for every activity in the Business Units. The Service Employee will be informed then.



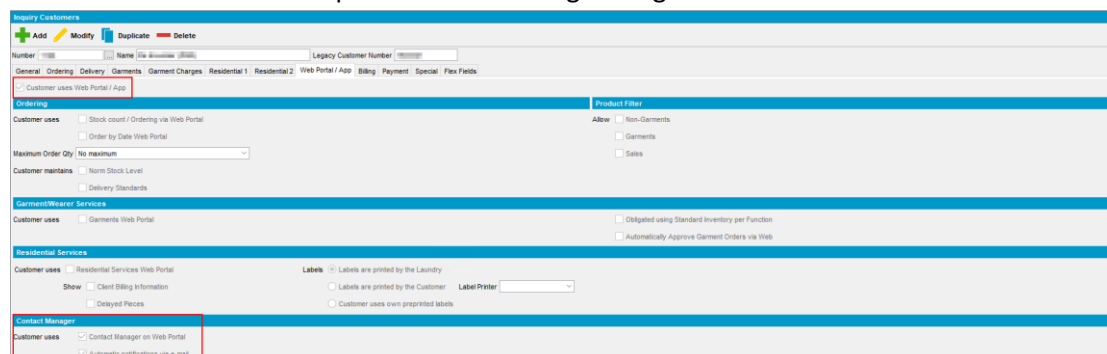
2.2.1 Activities per customer

Only the Activities per customer, are enabled to select as a Business Line.



2.3 Customer

The customer needs to be set up for Contact Manager usage.



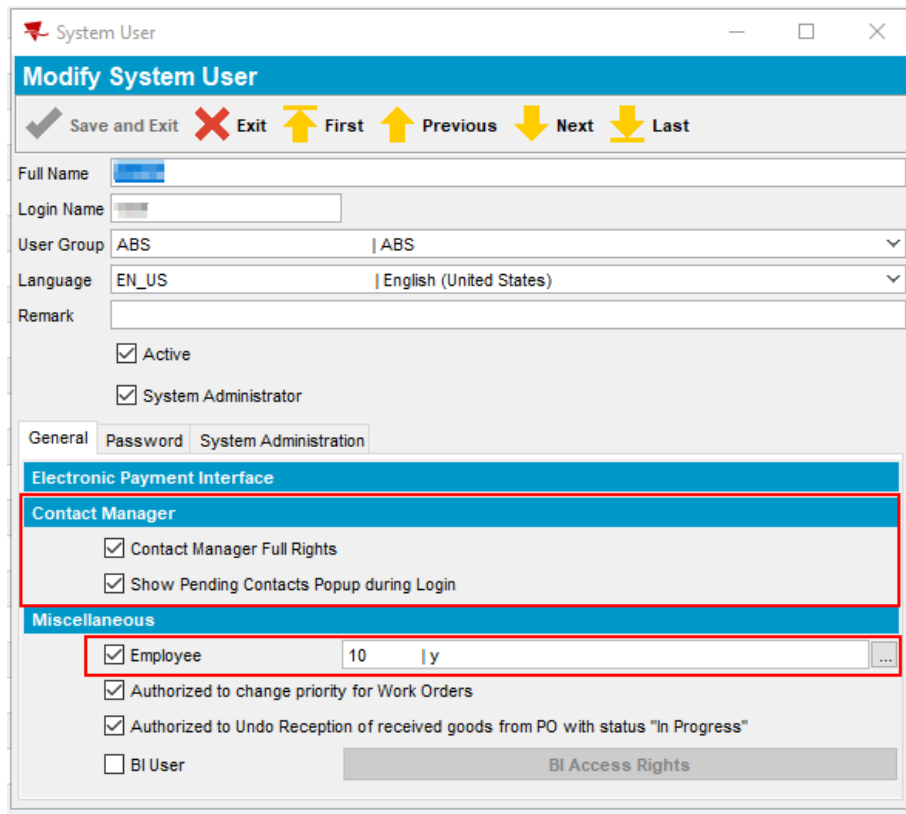
Customer uses Web Portal / App: To have access to the Web Portal

Customer uses: Contact Manager on Web Portal: To have access to the Contact Manager in the Web Portal

Customer uses: Automatic Notification via e-mail: To receive e-mails when the contact is added/modified.

2.4 System User

Define that the System User has Full rights to Contact Manager. An employee is necessarily to for sharing information. Only 1 Employee can be linked to 1 System User.



System User

Modify System User

Save and Exit Exit First Previous Next Last

Full Name []

Login Name []

User Group ABS | ABS

Language EN_US | English (United States)

Remark []

Active

System Administrator

General Password System Administration

Electronic Payment Interface

Contact Manager

Contact Manager Full Rights

Show Pending Contacts Popup during Login

Miscellaneous

Employee 10 | y

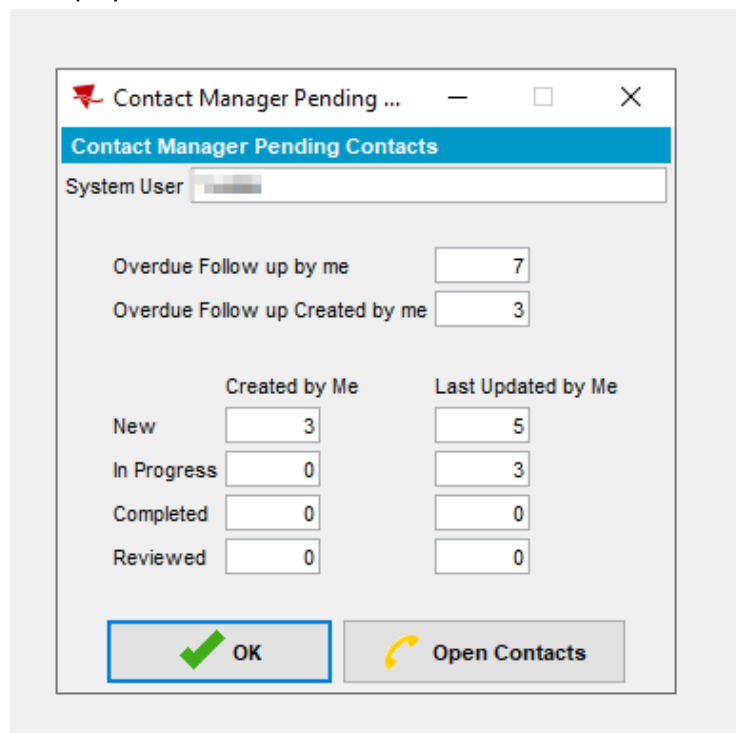
Authorized to change priority for Work Orders

Authorized to Undo Reception of received goods from PO with status "In Progress"

BI User

BI Access Rights

The Show Pending Contacts Popup during Login is optional. When checked and logged in, the following screen is on display:



Contact Manager Pending ...

Contact Manager Pending Contacts

System User []

Overdue Follow up by me [7]

Overdue Follow up Created by me [3]

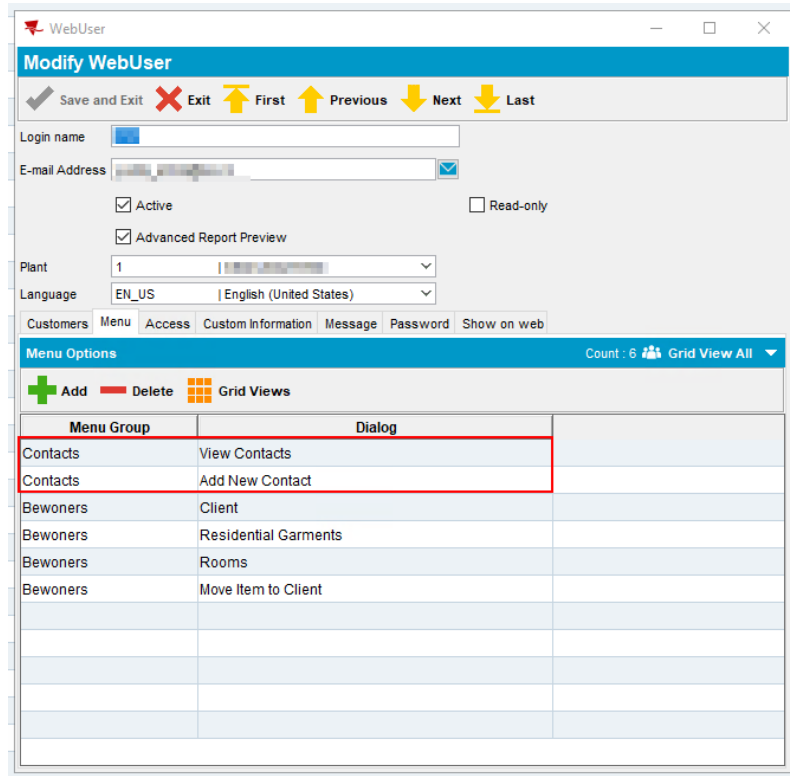
	Created by Me	Last Updated by Me
New	[3]	[5]
In Progress	[0]	[3]
Completed	[0]	[0]
Reviewed	[0]	[0]

OK

2.5 Web User

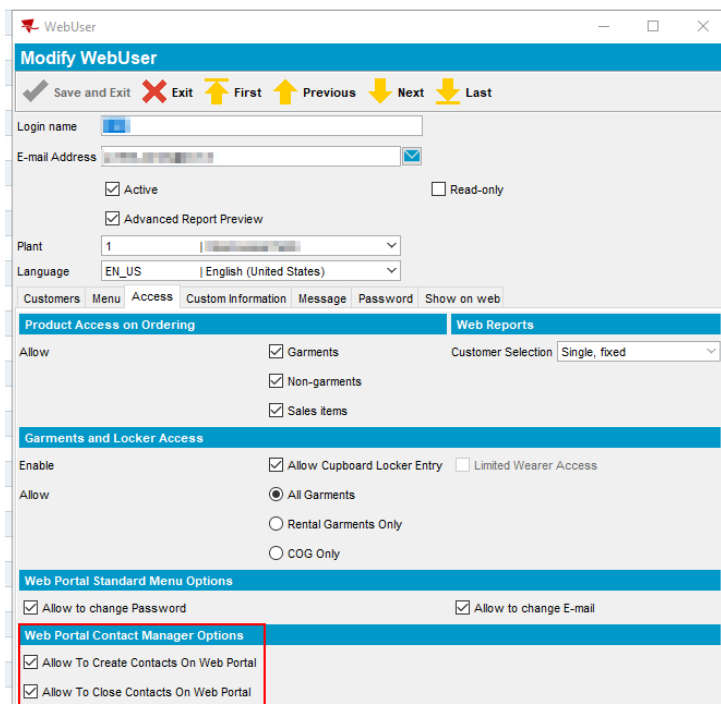
For the web user to add/view contacts, the following needs to be adjusted in the Web User dialog. The menus are only available after activation via “Web Portal Menu Definition” Dialog.

Web User -Menu



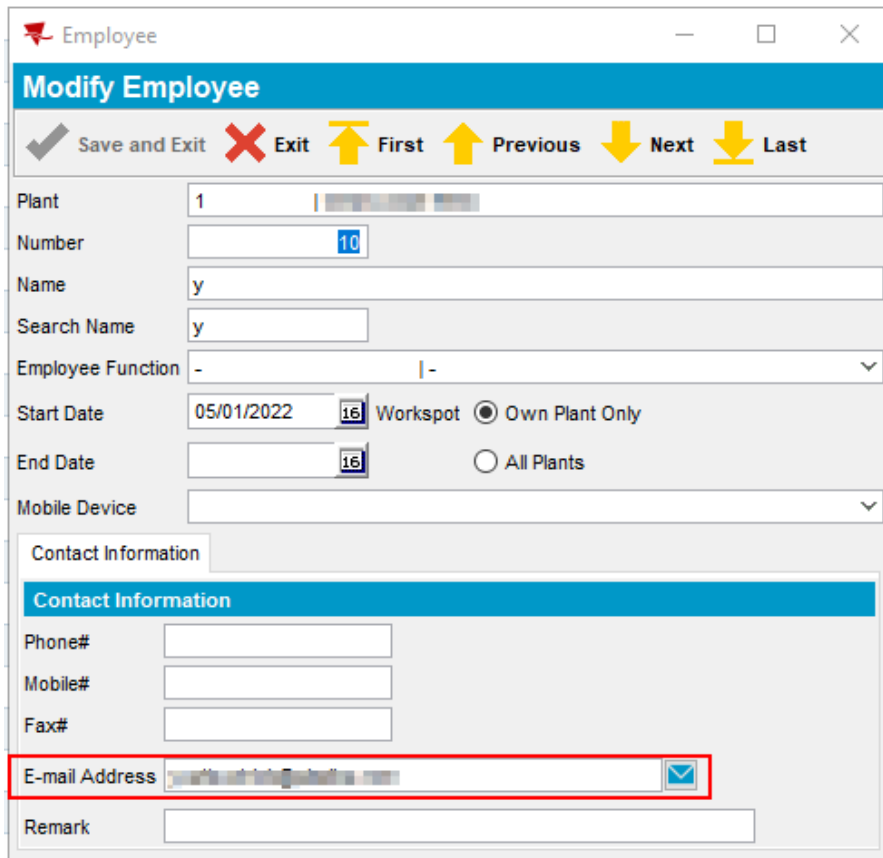
The Web user needs to be able to create/close contacts on the web.

Web User -Web Portal Contact Manager Options



2.6 Employees

An e-mail should be defined to receive an email notification.



The screenshot shows the 'Modify Employee' window. The 'E-mail Address' field in the 'Contact Information' section is highlighted with a red border. The form contains the following fields and options:

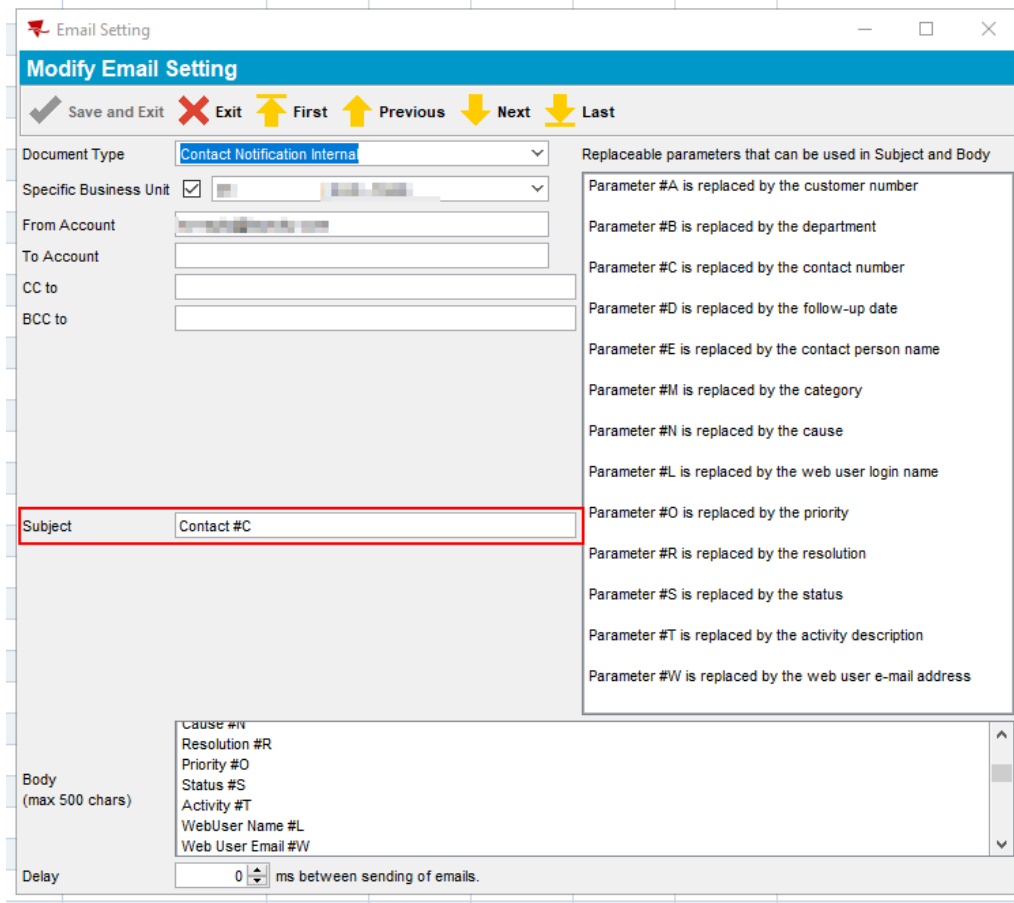
- Plant: 1
- Number: 10
- Name: y
- Search Name: y
- Employee Function: - | -
- Start Date: 05/01/2022 (calendar icon) | Workspot: Own Plant Only
- End Date: (calendar icon) | All Plants
- Mobile Device: (dropdown menu)
- Contact Information:
 - Phone#: (text field)
 - Mobile#: (text field)
 - Fax#: (text field)
 - E-mail Address: (text field with email icon, highlighted in red)
- Remark: (text field)

2.7 E-mail Setting

The Contact Notification Internal and Contact Notification Web needs to be added.


E-mail Settings			
Document Type	Subject	From Account	Delay
Client Invoices	Factuur email	...	200
Contact Notification Internal	Contact #C	no-reply@laundry.com	0
Contact Notification Web	Contact #C with cause #N was modified		0
Diagnostics	-	...	200
Import Payment Notification	0
Invoice	Factuur email	...	5000

Where the Contact Notification Internal refers to e-mail the service employee that will handle the follow up. The e-mail will notify that a new contact is created. Subject can be modified. Advised is to use a general subject, since this is regards all internal about the Contact notifications.



From account is the e-mail address from where the system user will be informed.

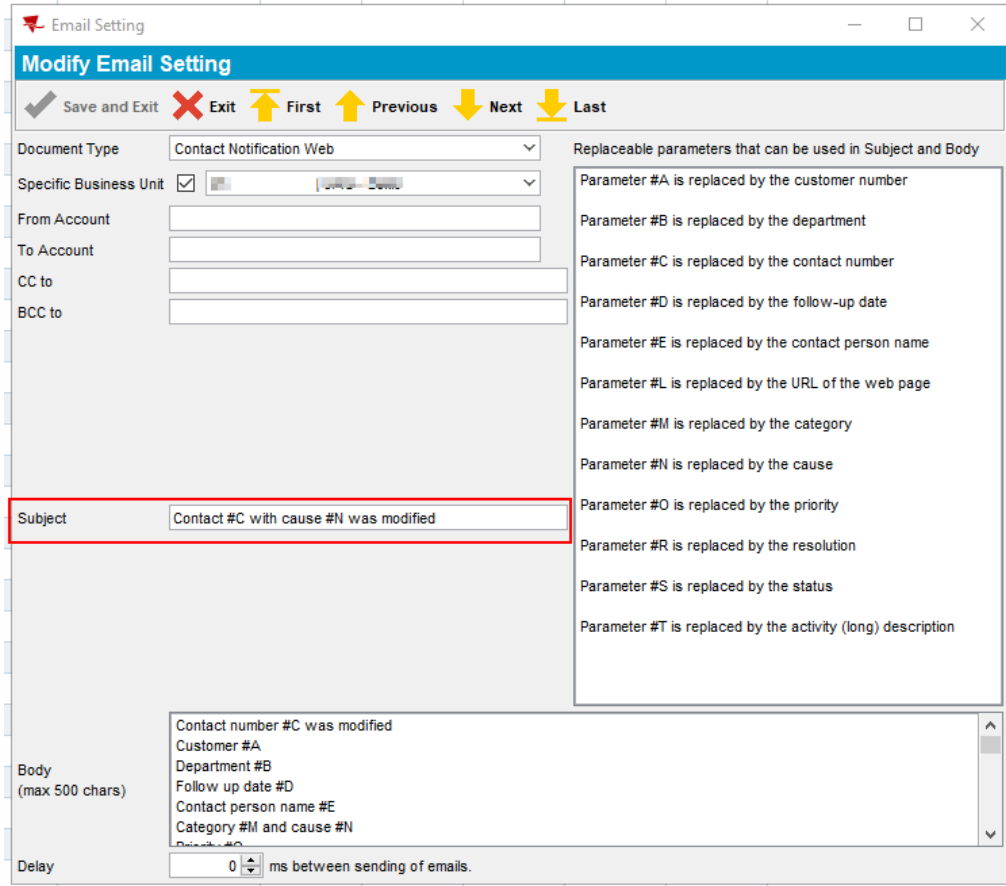
Contact 768

 no-reply@laundry.com

CAUTION! This email originated from outside our organization. Do not click links or open attachments unless you recognize the sender and know the content is safe. If you are in any doubt please first contact IT via Teams or via e-mail on IT-Team@absbs.com!

CustomerNumber 1018
 Department 0
 Contact Number 768
 Follow-up Date 2022-06-30 00:00:00.0
 Person Name
 Category: YST
 Cause aa
 Resolution
 Priority High
 Status New
 Activity Garments
 WebUser Name YST
 Web User Email laundry@absbs.com

The Contact Notification Web is for the Web User to be informed. Subject can be modified. Advised is to use a general subject, since this is regarding all Web e-mail about the Contact notifications.



Notifications are sent through “Send document via email” in the process scheduler.

2.8 Contact Categories

The contact Categories dialog consists of 3 Tabs. The configuration of the Contact Categories dialog is defined for the general use of the Contact manager, not per customer.

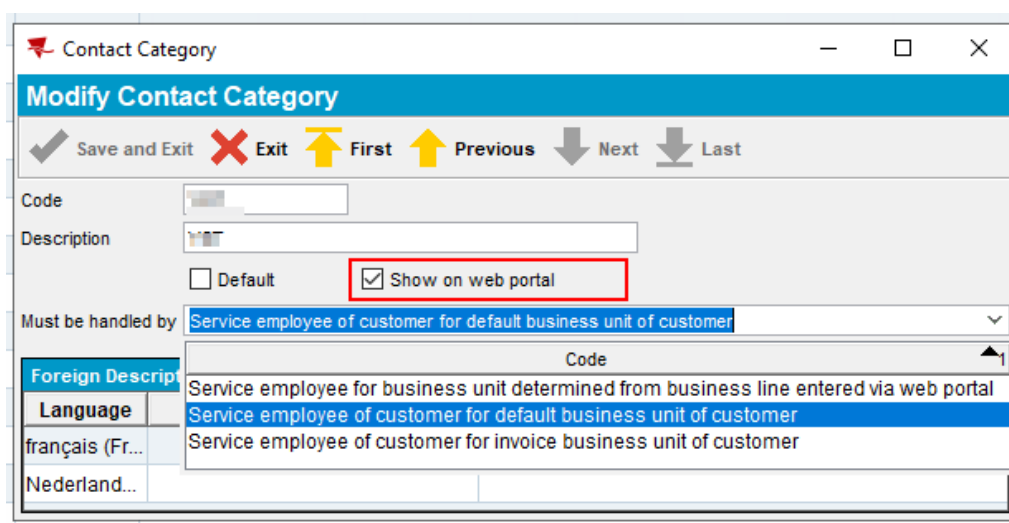
Contact Categories				
Contact Categories Contact Causes Contact Resolutions				
Contact Categories				
+ Add ✎ Modify ✖ Delete 📄 Duplicate 📊 Grid Views				
Code	Description	Default	Show on web portal	Must be handled by
66	77	<input type="checkbox"/>	<input type="checkbox"/>	
11		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Service employee for business unit determined from business line entered via web portal
96	ALF_Cat	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Service employee for business unit determined from business line entered via web portal
97	ALF_Cat_1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Service employee of customer for default business unit of customer
98	ALF_Cat_2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Service employee of customer for invoice business unit of customer
CAT1	Category 1 (US)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Service employee of customer for default business unit of customer
CAT2	Category 2 (US)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Service employee of customer for default business unit of customer
CAT3	Category 3 (US)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Service employee of customer for invoice business unit of customer
CAT4	Category 4 (US)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Service employee for business unit determined from business line entered via web portal
MIO1	MIO Category	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Service employee of customer for default business unit of customer
YST	YST	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Service employee of customer for default business unit of customer

2.8.1 Tab: Contact Categories

When a Contact Categories is added, which is the first to define when added a contact on the Web. More information about adding contacts on web: [Chapter 3](#).

Contact Categories				
Contact Categories Contact Causes Contact Resolutions				
Contact Categories				
+ Add ✎ Modify ✖ Delete 📄 Duplicate 📊 Grid Views				
Code	Description	Default	Show on web portal	Must be handled by
66	77	<input type="checkbox"/>	<input type="checkbox"/>	
11		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Service employee for business unit determined from business line entered via web portal
96	ALF_Cat	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Service employee for business unit determined from business line entered via web portal
97	ALF_Cat_1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Service employee of customer for default business unit of customer
98	ALF_Cat_2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Service employee of customer for invoice business unit of customer
CAT1	Category 1 (US)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Service employee of customer for default business unit of customer
CAT2	Category 2 (US)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Service employee of customer for default business unit of customer
CAT3	Category 3 (US)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Service employee of customer for invoice business unit of customer
CAT4	Category 4 (US)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Service employee for business unit determined from business line entered via web portal
MIO1	MIO Category	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Service employee of customer for default business unit of customer
YST	YST	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Service employee of customer for default business unit of customer

The checkbox “Show on web portal” needs to be checked in order to be able to select.



Modify Contact Category

Save and Exit
 Exit

Code:

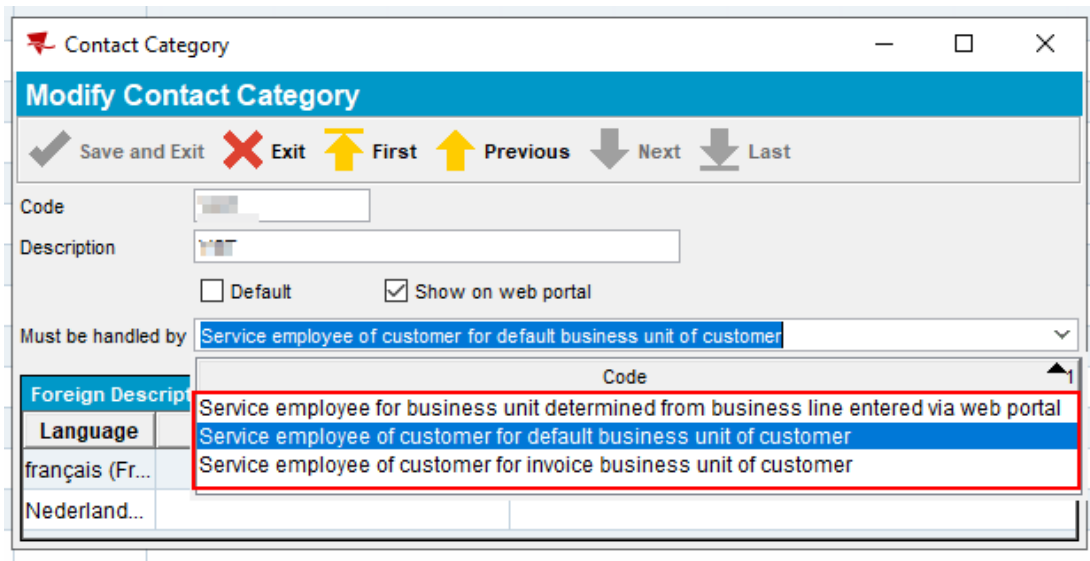
Description:

Default
 Show on web portal

Must be handled by:

Foreign Description	Code
	Service employee for business unit determined from business line entered via web portal
	Service employee of customer for default business unit of customer
français (Fr...	Service employee of customer for invoice business unit of customer
Nederland...	

Must be handled by:

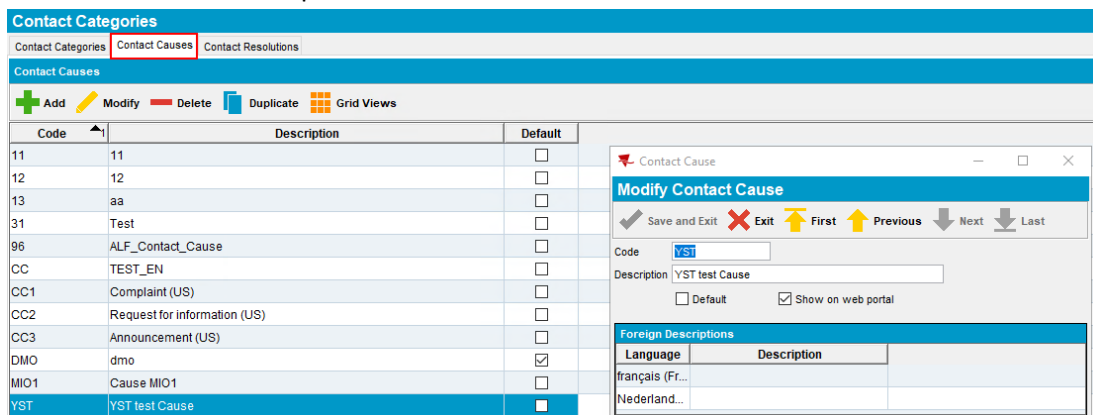


Foreign Descrip	Code
Service employee for business unit determined from business line entered via web portal	
Service employee of customer for default business unit of customer	
Service employee of customer for invoice business unit of customer	

Service employee for business unit determined from business line entered via web portal:
 Business line not mandatory for the “service employee of customer for default business unit of customer” and “service employee of customer for invoice business unit of customer”.

2.8.2 Contact Causes

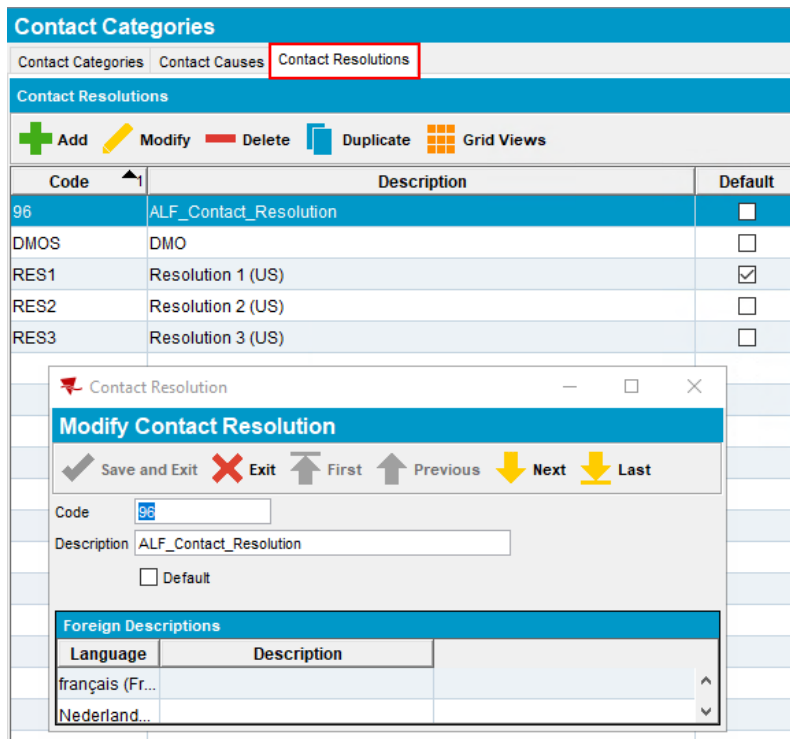
The checkbox “Show on web portal” needs to be checked in order to be able to select.



Code	Description	Default
11	11	<input type="checkbox"/>
12	12	<input type="checkbox"/>
13	aa	<input type="checkbox"/>
31	Test	<input type="checkbox"/>
96	ALF_Contact_Cause	<input type="checkbox"/>
CC	TEST_EN	<input type="checkbox"/>
CC1	Complaint (US)	<input type="checkbox"/>
CC2	Request for information (US)	<input type="checkbox"/>
CC3	Announcement (US)	<input type="checkbox"/>
DMO	dmo	<input checked="" type="checkbox"/>
MIO1	Cause MIO1	<input type="checkbox"/>
YST	YST test Cause	<input type="checkbox"/>

2.8.3 Contact Resolutions

The contact Resolutions are not shown on the Web.



The screenshot shows the 'Contact Resolutions' section of the application. At the top, there are tabs for 'Contact Categories', 'Contact Causes', and 'Contact Resolutions'. Below the tabs is a toolbar with icons for 'Add', 'Modify', 'Delete', 'Duplicate', and 'Grid Views'. A table lists the resolutions with columns for 'Code', 'Description', and 'Default'. A dialog box titled 'Modify Contact Resolution' is open, showing the current resolution details and a section for 'Foreign Descriptions'.

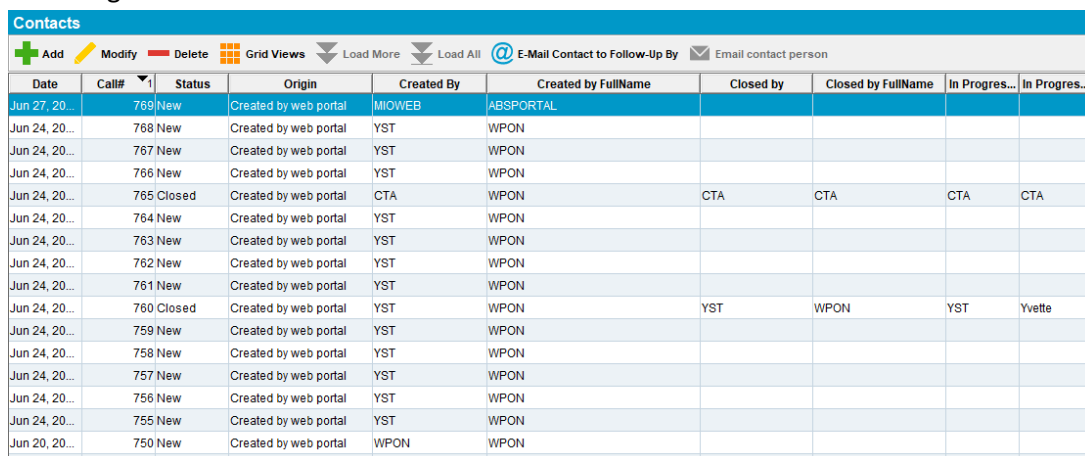
Code	Description	Default
96	ALF_Contact_Resolution	<input type="checkbox"/>
DMOS	DMO	<input type="checkbox"/>
RES1	Resolution 1 (US)	<input checked="" type="checkbox"/>
RES2	Resolution 2 (US)	<input type="checkbox"/>
RES3	Resolution 3 (US)	<input type="checkbox"/>

Language	Description
français (Fr...	
Nederland...	

2.9 Contacts

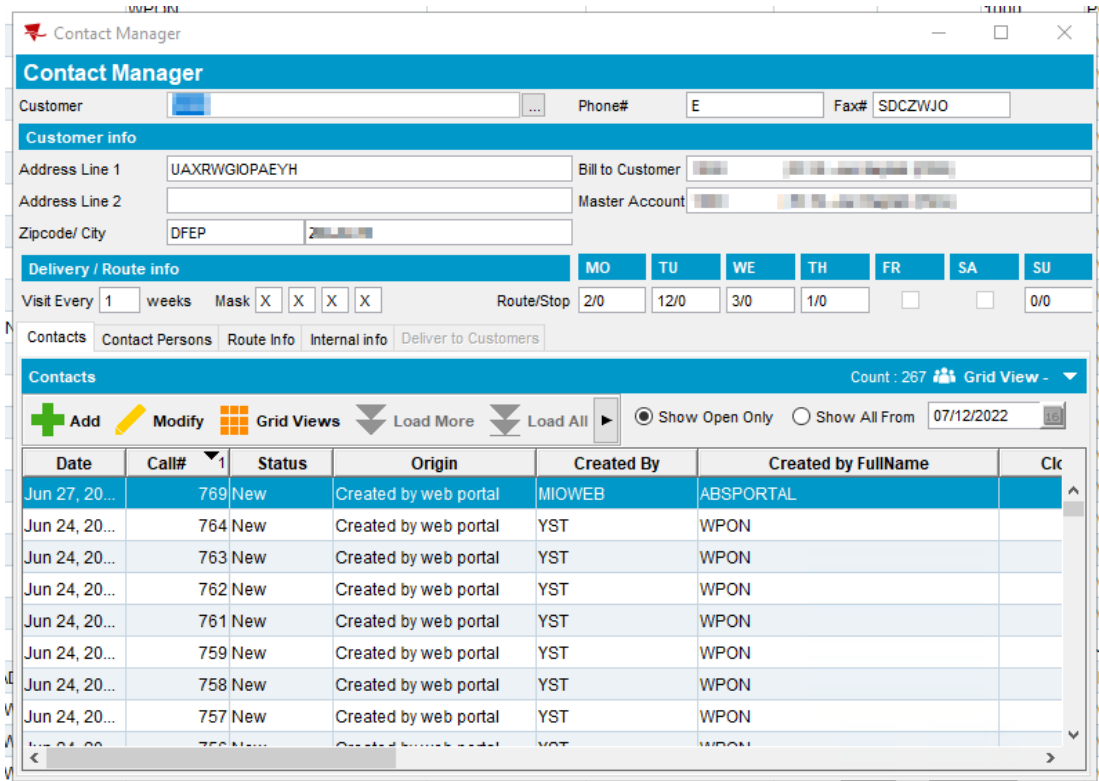
Contacts can be viewed/modified with the contact dialog or the top bar ContactManager option. With the contact screen, all contacts created are on display. In the top bar ContactManager the customer contacts are on display.

Contact dialog – All contacts

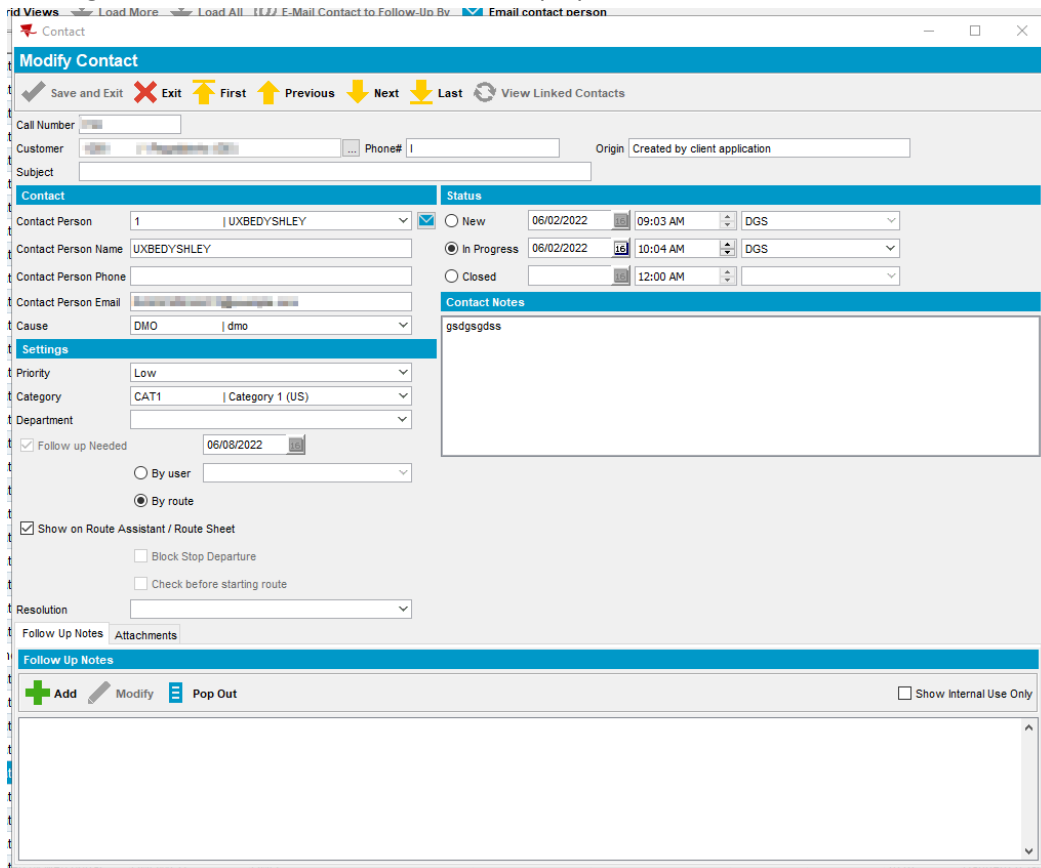


Date	Call#	Status	Origin	Created By	Created by FullName	Closed by	Closed by FullName	In Progres...	In Progres...
Jun 27, 20...	769	New	Created by web portal	MIOWEB	ABSPORTAL				
Jun 24, 20...	768	New	Created by web portal	YST	WPON				
Jun 24, 20...	767	New	Created by web portal	YST	WPON				
Jun 24, 20...	766	New	Created by web portal	YST	WPON				
Jun 24, 20...	765	Closed	Created by web portal	CTA	WPON	CTA	CTA	CTA	CTA
Jun 24, 20...	764	New	Created by web portal	YST	WPON				
Jun 24, 20...	763	New	Created by web portal	YST	WPON				
Jun 24, 20...	762	New	Created by web portal	YST	WPON				
Jun 24, 20...	761	New	Created by web portal	YST	WPON				
Jun 24, 20...	760	Closed	Created by web portal	YST	WPON	YST	WPON	YST	Yvette
Jun 24, 20...	759	New	Created by web portal	YST	WPON				
Jun 24, 20...	758	New	Created by web portal	YST	WPON				
Jun 24, 20...	757	New	Created by web portal	YST	WPON				
Jun 24, 20...	756	New	Created by web portal	YST	WPON				
Jun 24, 20...	755	New	Created by web portal	YST	WPON				
Jun 20, 20...	750	New	Created by web portal	WPON	WPON				

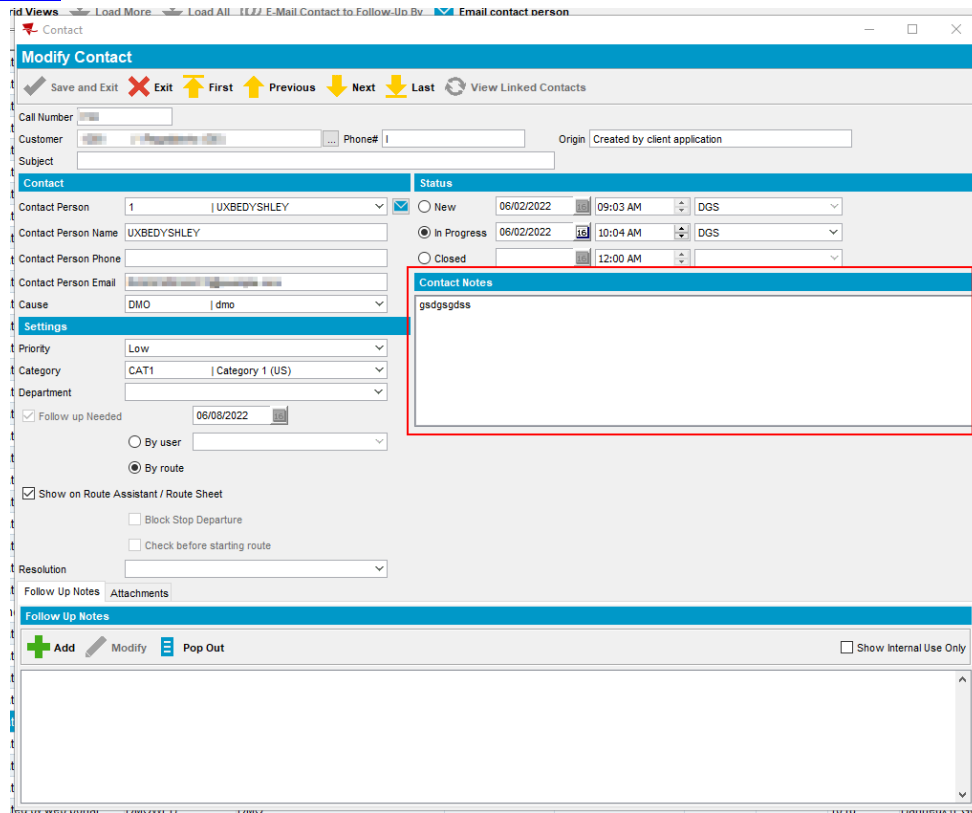
ContactManager – Customer search



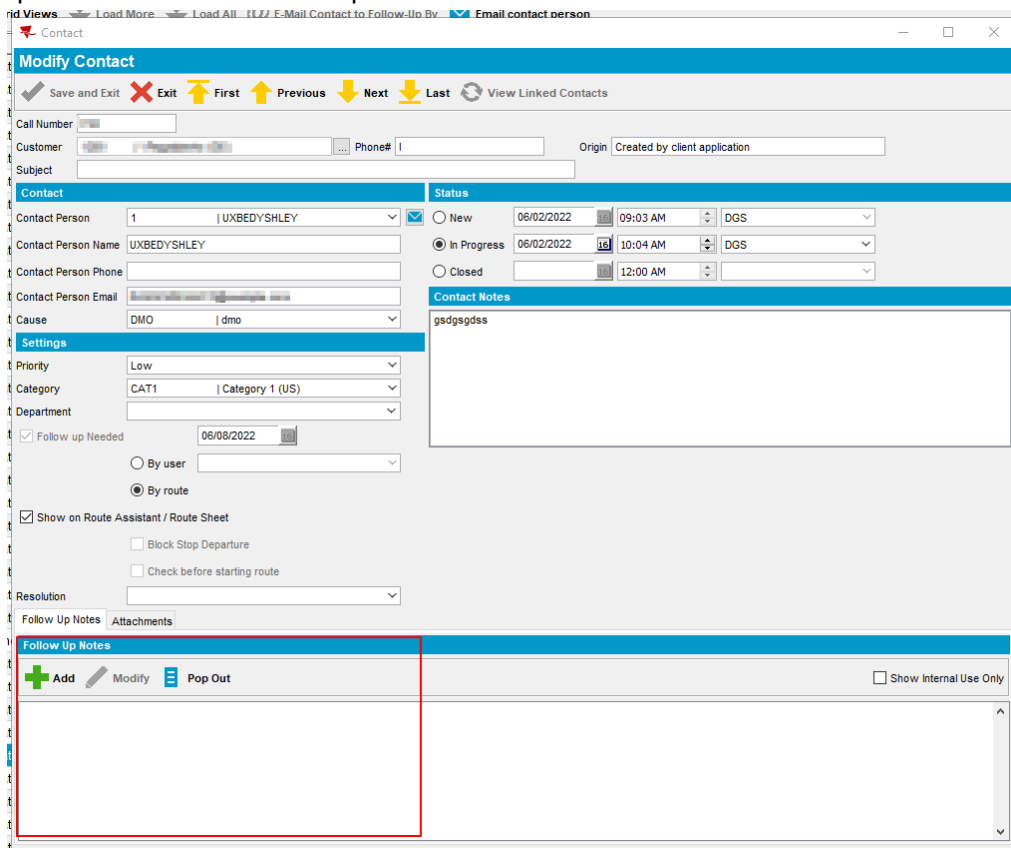
After selecting a contact, the next screen will be displayed:

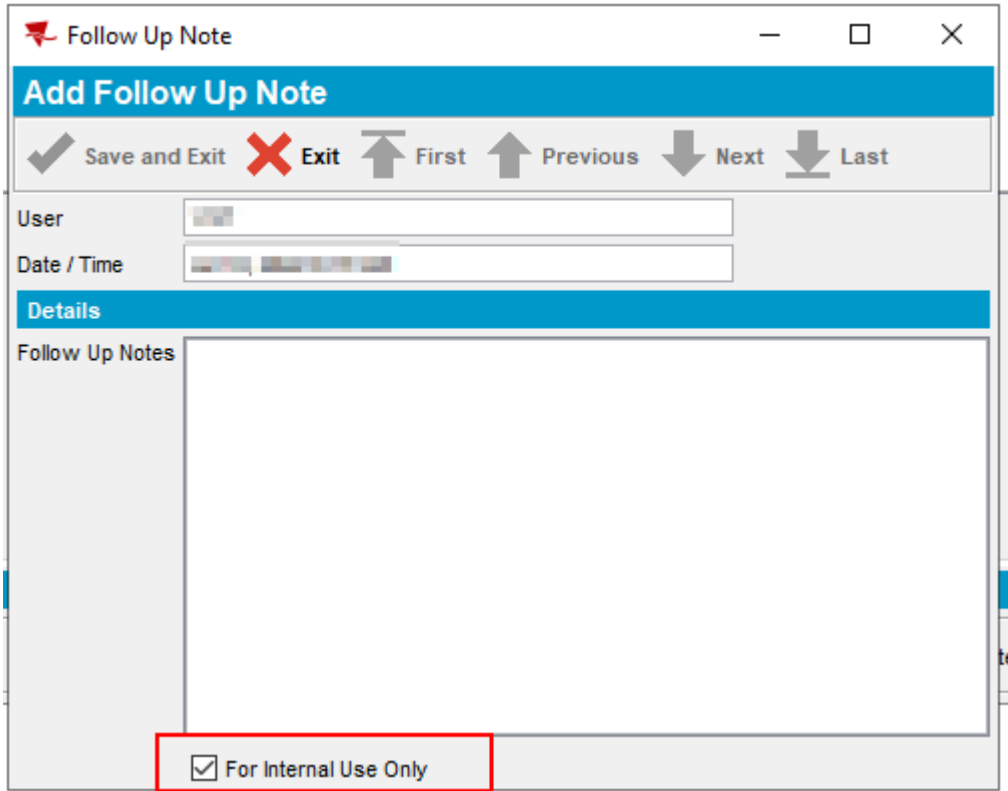


Where you can see the contact created on the Web. If this can be modified depends on a [systemsetting](#).

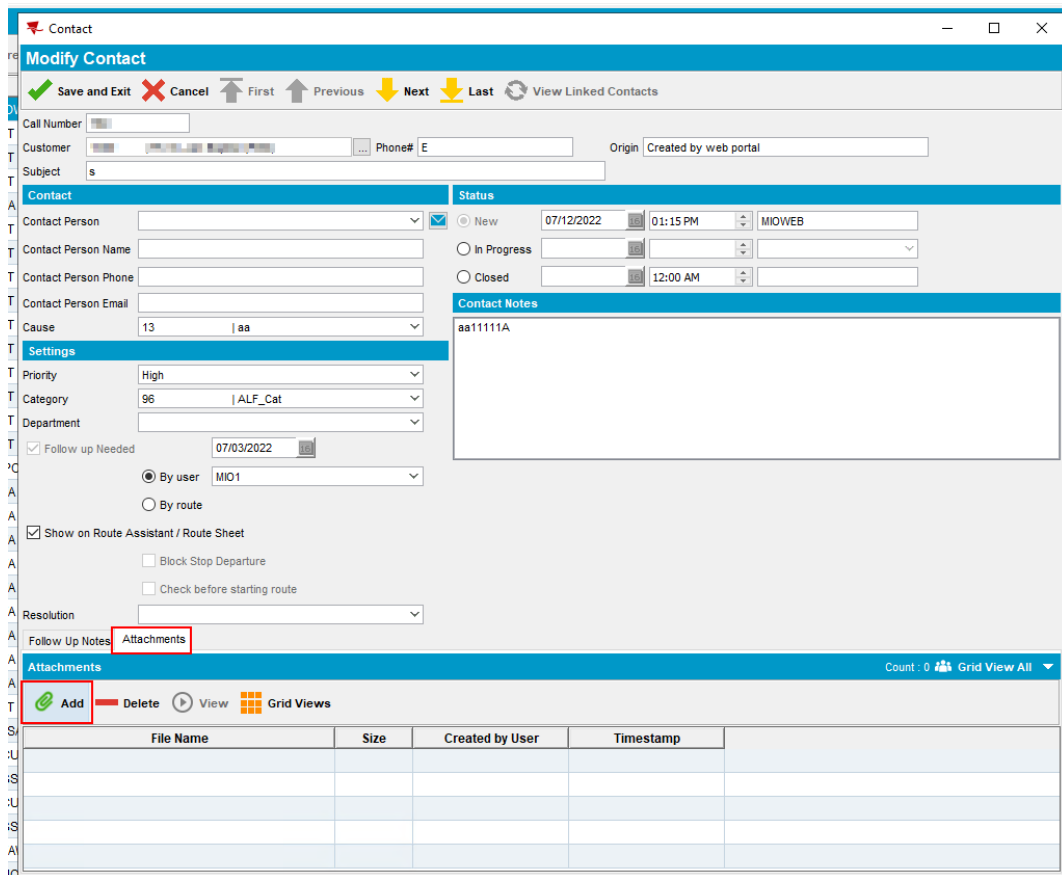


A Follow Up note can be added. Depending if its Internal Use only or not, the web user can see the Follow Up note on the web. Follow up notes can be added for internal or external use.

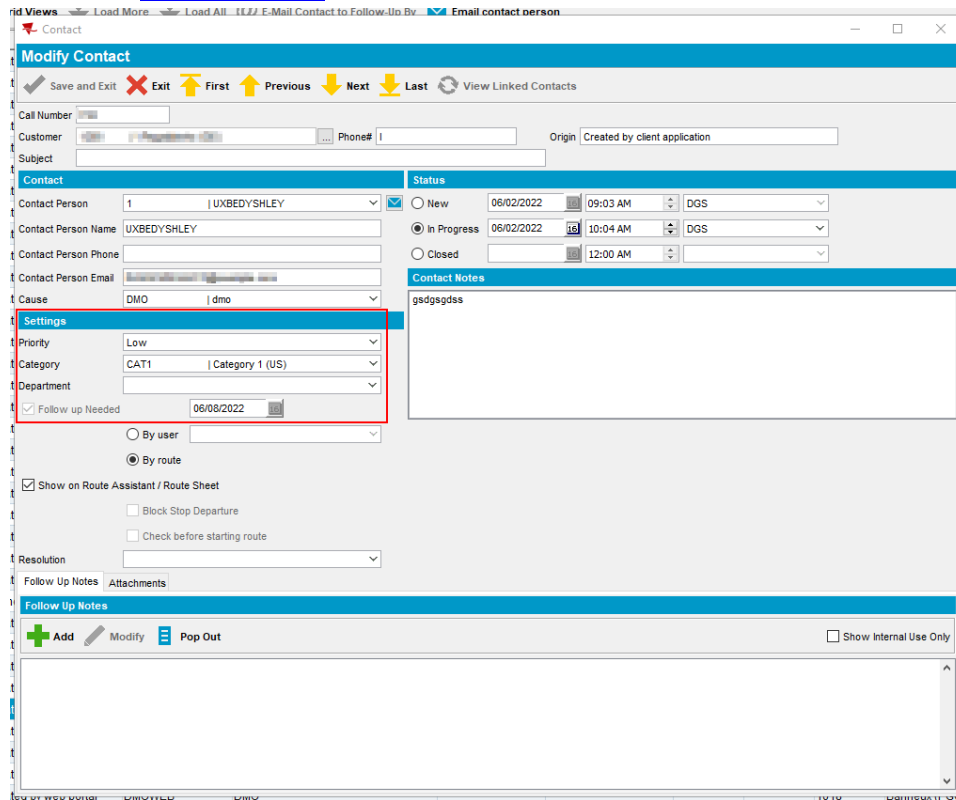




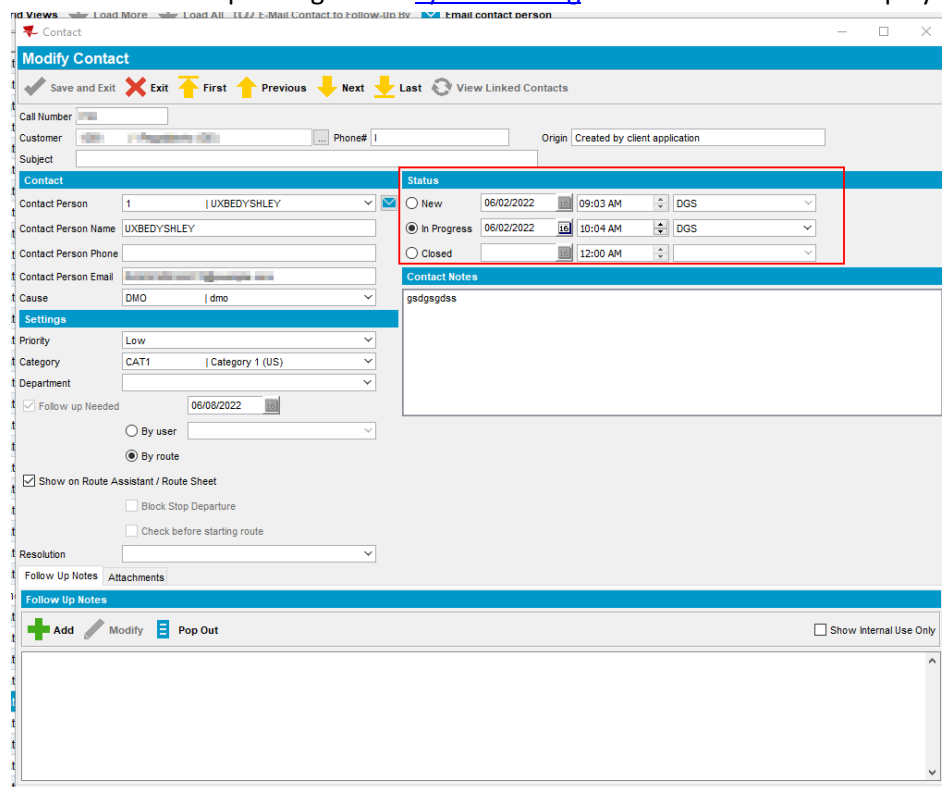
In the Attachments Tab are the Attachments that the web user added on the web. Besides, it is possible to add an Attachment by pressing the “Add” Button. The web user can view the Attachment in “View Contacts” on the Web.



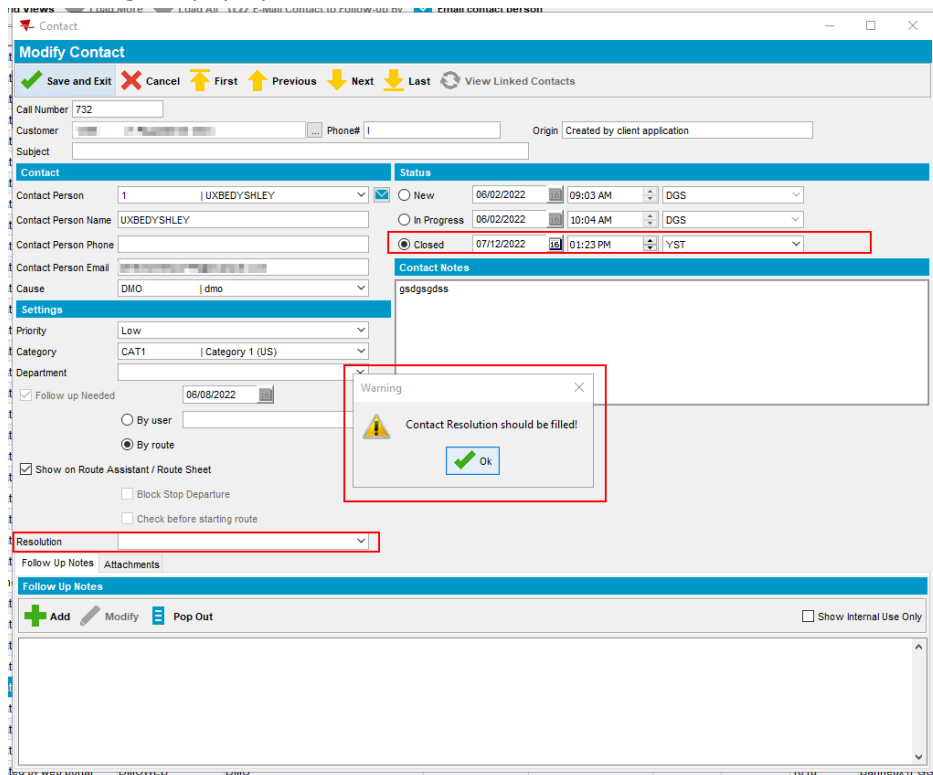
Priority is always High when newly added. The Priority can be modified afterwards. The follow up time depends on the [system settings](#).



Contacts, statuses can be modified. If the status is completed or reviewed it is not possible for the web user to modify the contact. If the contact is closed, it is not possible to reopen it, neither in ABSolute or on the Web. Depending on the [systemsetting](#) 3 or 5 statuses are on display.



Contact Resolution should be filled when closing contact. Otherwise it is not possible to close the contact and a warning will pop up.



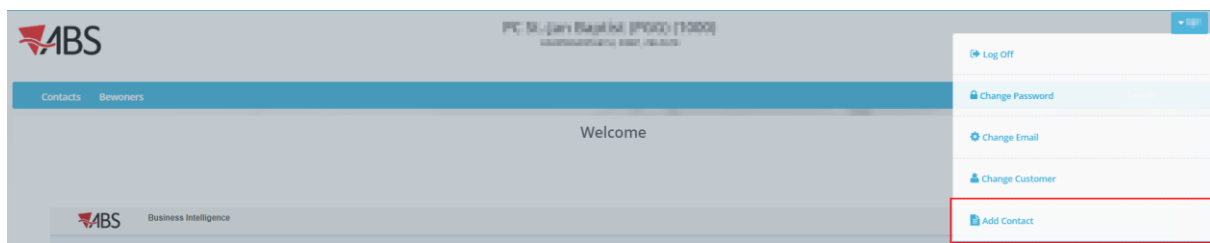
3 Web portal

When we web user logs in on the Webportal, there are two paths to “Add a new contact”.

1

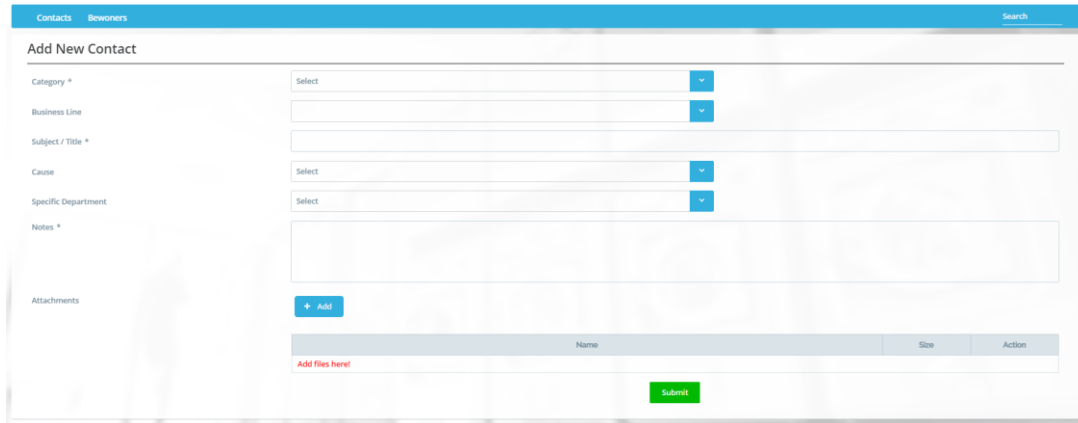


2



When clicking on “Add new contact” or “Add contact”, the following screen is displayed.

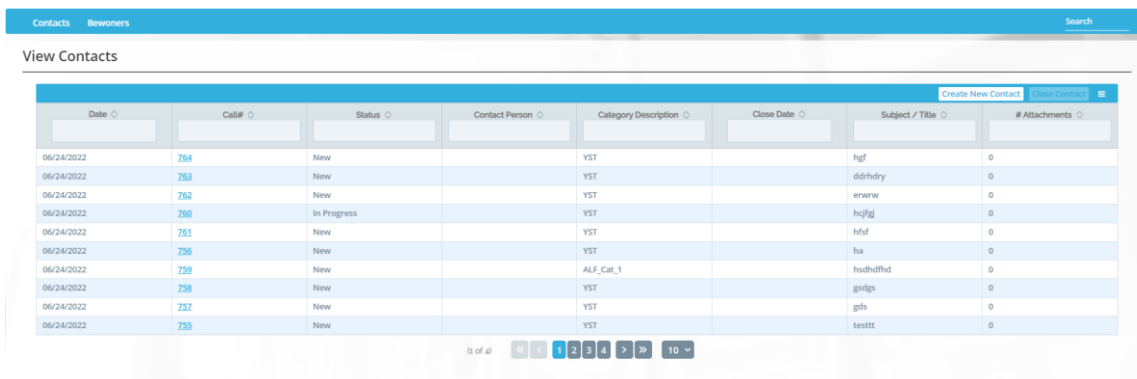
Add New Contact



Category	Defined in: Contact Categories, Tab Contact Categories.
Business Line	Defined in: Business Units – Tab Activities (all the activities). Activities per customer (which available for our customer).
Subject/title	Filled in by Web User
Cause	Defined in: Contact Categories, Tab Contact Causes
Specific Department	Defined in: Departments
Notes	Filled in by Web User
Attachments	Optional: Filled in by Web User. Only: *.jpg;*.jpeg;*.png;*.mp3;*.wav;*.bmp;*.doc;*.docx;*.pdf;*.rtf;*.txt;*.msg

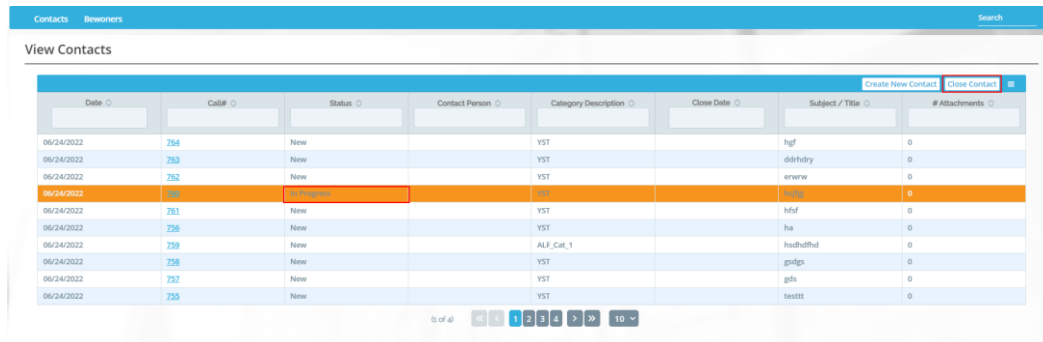
3.1 View Contacts

When clicking on “View Contacts”, the following screen is displayed. The Contacts that the web user added, are visible.



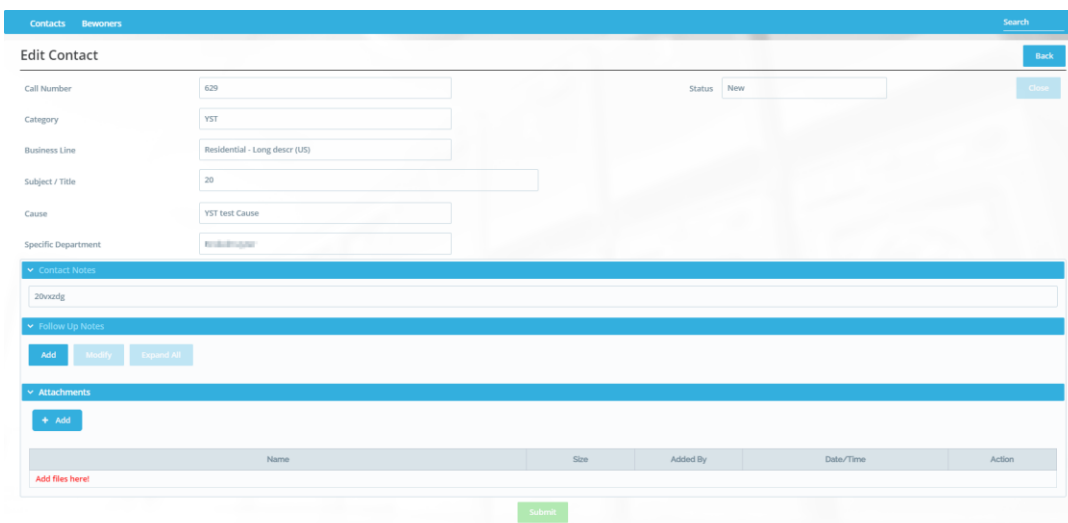
Date	Call#	Status	Contact Person	Category Description	Close Date	Subject / Title	# Attachments
06/24/2022	764	New		YST		hgf	0
06/24/2022	763	New		YST		ddr-hdry	0
06/24/2022	762	New		YST		emrw	0
06/24/2022	760	In Progress		YST		hcjfg	0
06/24/2022	761	New		YST		hfsf	0
06/24/2022	756	New		YST		ha	0
06/24/2022	759	New		ALF_Cat_1		hschdfhd	0
06/24/2022	758	New		YST		gsdps	0
06/24/2022	757	New		YST		gds	0
06/24/2022	755	New		YST		testtt	0

Only contacts who are “In progress” can be closed by the web user. Then the button “Close contact” is enabled. Closed contact can not be reopened or adjusted.



Date	Call#	Status	Contact Person	Category Description	Close Date	Subject / Title	# Attachments
06/24/2022	754	New		YST		hgf	0
06/24/2022	753	New		YST		slrhdy	0
06/24/2022	752	New		YST		erwew	0
06/24/2022	755	In Progress		YST			0
06/24/2022	751	New		YST		hfhf	0
06/24/2022	736	New		YST		ha	0
06/24/2022	739	New		ALF_Cat_1		huhthhd	0
06/24/2022	738	New		YST		gdgds	0
06/24/2022	737	New		YST		gls	0
06/24/2022	735	New		YST		testtt	0

The contact can be seen and edited by pressing the blue call number. The contact note, follow up note and the attachments can be edited.



The web user cannot change the Status of the contact. There is no limit to the Follow Up Notes. The newest Follow Up Note is added first.

Select the Follow Up Note and press Modify to be able to edit the contact. Afterwards, click on the submit button to submit the adjustment. Besides, it is possible to add and delete attachments in this screen.

