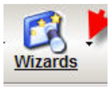
Notepad Entry Wizard

Procedure Guide

October 2007

This Customer Frontline™ (CFL) procedure places a note title and note content into the notepads of multiple customer records. This utility is frequently used to document an email merge sent to a pre-qualified segment of customers.

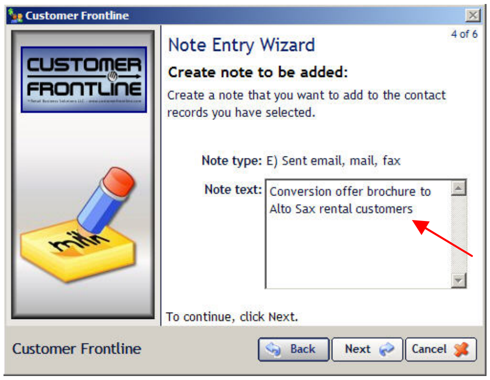
1) Select the customer records that are to receive the notepad entry.



2) Click the Wizards down arrow in the upper CFL toolbar select “Note Entry Wizard”.

3) Press “Next” through the first two Wizard Screens.

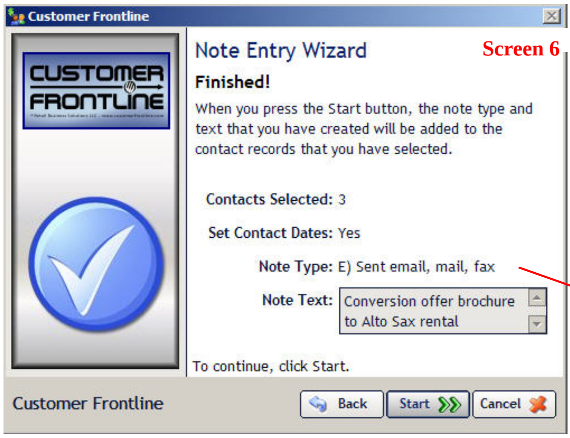
4) Screen 3: Select the notepad header you want inserted into the selected customer records.

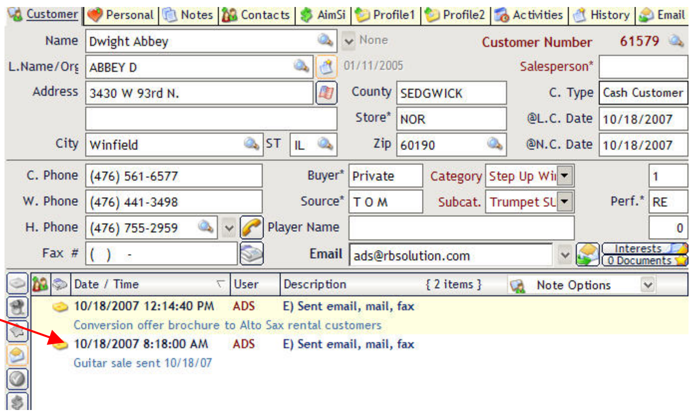


5) Screen 4: Enter your description of the contact contents to be displayed in the notepad.

6) Screen 5: Select “No” if you do not want CFL to automatically update the “Last Contact” and “Next Contact” date fields in the selected customer records. Otherwise, choosing “Yes” will insert the date of your notepad entry into both of these fields.

7) Screen 6: This screen verifies the entry notes by customer count, header type and note content. Press “Start” to complete the Wizard, the notes will be entered in each customer record.





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