Portrait
Dialogue

Customer View User Guide

Version 6.2

Pitney Bowes
Software

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- The circumstances in which the problem arose
- What error messages you saw (if any);
- The version of the software that you were using.

Pitney Bowes Software Inc.

April 13, 2018

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1

Introduction

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Purpose

This document describes how to use Portrait Dialogue's Customer View, a web based Customer Relationship Management tool.

Intended audience

This document is intended for people who will use the Customer View to view, edit or add customer information.

Other users include System Administrators and Portrait Dialogue implementation consultants.

Related documentation

Document	Media (zip/dvd) and location
PD Visual Dialogue User Guide	Portrait Dialogue media in: \Documentation\<*language_code*>\
PD Reports Portal User Guide	Portrait Dialogue media in: \Documentation\<*language_code*>\
PD Telemarketing User Guide	Portrait Dialogue media in: \Documentation\<*language_code*>\
PD Web Portal User Guide	Portrait Dialogue media in: \Documentation\<*language_code*>\

Note: These documents and others can be downloaded from the Pitney Bowes Software website: **http://www.pbinsight.com/support/product-documentation/p/**

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The basics

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Introduction

This chapter introduces the basic concepts underlying Customer View, including how to start the application and how its windows are organized.

About Customer View

Customer View allows you to register, view and update customer information. From the customer card in Customer View you can send email, SMS, register new documents and responses to questionnaires.

Customer View shows customer history on documents, activities, messages, and responses to questionnaires together with transactions from customer processes related to the individual customer. Depending on the configuration, Customer View can show customer data from other data sources like ERP, order and transactions systems. The Customer View application can be configured to meet the needs of your organization or group by a system consultant using Dialogue Admin - another application within the suite.

Display external data in Customer View

Information from other systems can be displayed in Customer View.

Information from your company production systems, for example an order processing and billing system, may be automatically loaded into the Customer View database at set times. In this way customer addresses, product portfolio or other information can be kept up-to-date and consistent with the information used by the rest of your organization.

Furthermore, when you define a Dialog (see Visual Dialogue User Guide) you may define response-handling routines including programmed scripts that update customer information automatically. For example, a customer responds to a questionnaire by saying that he has a certain kind of car, or by describing himself as very interested in certain types of communication from your company. This information from the answer form can be used to *automatically* set or change the customers category information (see later in this chapter) or to *automatically* place an activity such as a personal call from an investment advisor onto the task schedule.

The customer can also edit her own data through the ***Customer Profile*** module. Via this module, the customer can view and edit the fields that are defined as available for ***Customer Profile***.

Customer domain

Portrait Dialogue has a flexible **customer** concept.

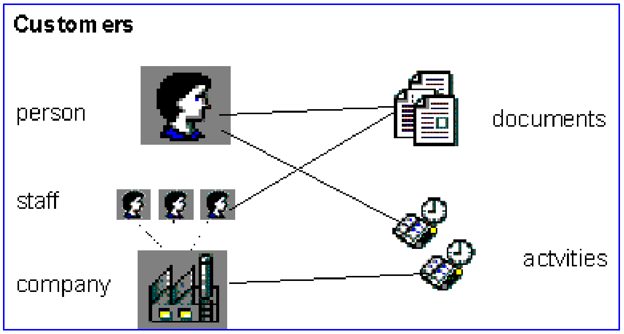
Most common applications are based on the principle that a customer is a **Person** or a **Company** belonging to one database.

In our case, the concept of customers are linked to a **Customer Domain**. A **Customer Domain** is a logical description of all available customers from one or several data sources, on one or several different technical platforms. System Administrators will create the domain/s needed for your organization. Customers in Customer View are available through the domains.

Examples of domains can be: **Person**, **Prospects**, **Companies**, **Organizations**, or **Groups**. Persons can be associated with a company as **Staff** or an organization as a **member**.

Besides customer information like: addresses, phone numbers, categories, score and purchasing profiles, Customer View helps you to create and keep track of:

- **documents** - letters or faxes
- **activities** - phone calls, email and customer appointments.



You can also keep track of:

- Customer-to-customer relationships
- Customer responses to questionnaires
- Customer interest
- Customer score
- Channel reservation (e.g. do not want to receive email)
- Cases list the cases a customer is involved in from your case-handling system, for example insurance claims, loan applications, service calls or the like.
- Products the customer has purchased.
- ERP data. (E.g. account status, outstanding payments and payment history)
- All information is available in all customer windows depending on the domain set-up. Information can be made available depending on user access.

Note: The application screen shots in this user guide can vary from the application you are using due to different configuration. If you have questions regarding functionality that you feel is missing, contact your System Administrator

Starting Customer View

Customer View supports two login types, normal and automatic. When using normal login, you manually type a username and password. When using automatic login, the system logs you in automatically without entering a username and password.

Normal login

1. Double-click the Customer View icon on your Windows desktop:

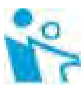
   Or

   Start the program from the favorites list in your web browser by choosing **Customer View**.
2. Type your user name and password.
3. Click **Log in**.

Automatic login

When automatic login is enabled you are automatically logged in to Customer View with your Windows login credentials. However, this requires that your Windows user account has access rights to Customer View.

1. Double-click the Customer View icon on your Windows desktop:

   Or

   Start the program from the favorites list in your web browser by choosing **Customer View**.
2. Customer View opens on the start page.

Advanced login

1. **INSTANCE**. When logging in to Customer View, the system can be set up to give access to different instances. To access this option, click on the **Advanced** button in the lower right corner. The window will expand and a drop down box will show available instances. Select the desired instance and continue to log in.
2. **CACHE**. In order to speed up the performance in Customer View, domain data is cached on the Web server. When the System Administrator makes changes in the domain data, the data cache has to be deleted. To access this option, click on the **Advanced** button in the lower right corner. The window will expand and a clear cache check box is shown. Check the box and continue to log in.

Menu navigation

On the left side is the **main menu**. All key Customer View screens can be accessed via these links. You can:

- access the start page
- access your tasks
- search (in each domain)
- see recently viewed customers
- use quick create shortcuts (which change depending on the current location in Customer View)
- exit and log out.

The menu at the right of the window (the **right menu**) gives access to:

- page settings (in each domain)
- standard and advanced search options.

Note: If you have Customer View open, and at the same time open another web link, the new link can be opened in the same window as Customer View. To avoid this, change your settings in Internet Explorer or open a new browser window before clicking on the new link.

Tip: For the most efficient use of the application, we recommend using the **<TAB>** function to move the cursor from field to field. If you press the key <enter> within a window, the command that is activated (shown with a darker frame around the button) is executed.

The top menu

The top menu bar contains the following options:

Menu	Command	Function
File	**New - Customer**	Shortcut to register a new customer.
	New - Activity	Shortcut to register a new activity. Only available when you have a customer open.
	New - Answer form	Shortcut to register a new answer form. Only available when you have a customer open.
	New - Message	Shortcut to register a new message. Only available when you have a customer open.
	Print	Print the printable area.
	Exit	Log off.
Edit		Not in use.
View	**Go to Start page**	Go direct to the start page.

Menu	Command	Function
	Go to Search page	Go direct to the search page.
	Refresh	Refresh the page.
Tools	**Page setting**	Search settings page.
	General setting	Personal program setting. Select language, default start page and default start domain
Help	**Contents and index**	Opens the help file and user guide.
	Product homepage	Link to Portrait Software.
	About MH CV	Information about the application including software version and session details.

The side menu

There are two important menus in Customer View are the **main menu** and the **right menu**.

The main menu is always visible on the left side in the application. The items on the main menu change according to which page you are on in Customer View. For example: the Activity item in the Quick create box is only available when viewing a customer.

Menu	Command	Function
General	**Start page**	Display the start page showing the last 10 opened customers and a list of the documents you have locked for editing.
	Search contacts	Search page for Contacts (might have a different name in your organization).
	Search companies	Search page for Companies (might have a different name in your organization).
Recent work	**Click on name**	Display name of the last 10 opened customers. Click on the name to open the customer.
Quick create	**Customer**	Register a new customer.
	Activity	Shortcut to register a new activity.
	Answer form	Shortcut to register a new answer form.
	Message	Shortcut to register a new email, SMS, document or a letter.
User info	**Exit**	Log off Customer View.
My tasks	**All due tasks**	Shows the My tasks page with all due tasks.
	Tasks due today	Shows the My tasks page with tasks due today.

Menu	Command	Function
	Tasks due the next seven days	Shows the My tasks page with tasks due in the next seven days.
	Overdue tasks	Shows the My tasks page with all overdue tasks.
Reports	**Available customer reports**	Customer reports are shown if any are available and you have the appropriate access rights.

The right-side menu

The right menu which is only available from inside a search window.

Note: Search options are connected to the domain. Each domain will have separate search settings.

Menu	Command	Function
Search type	**Normal**	Standard search window
	Advanced	Access to search functions like: Search on predefined selections designed in Visual Dialogue, or search using expressions.
Search settings	**Settings**	Opens the Search settings page.

Customer View tabs

In Customer View the information is organized in a few main windows with additional top and bottom tabs for easy access to in-depth information.

For example, the Search window has a number of top tabs for accessing more search criteria.

By clicking on a tab you get access to the associated fields. The open tab will be shown with a darker color. Use the cursor to open the different tabs by clicking on the tab.

Tabs are found in the search window (only top tabs) and inside the customer window (top and bottom tabs). Each domain can have different top and bottom tabs depending on the information available in the domain and the configuration done by your organization.

In the Customer Window both top and bottom tabs give access to in-depth information.

The Person and Company page has 3 top tabs:

- **Main -** Contains the customer information most needed when working with the customer
- **Secondary -** For customer information used less frequently
- **Note -** Note field for writing comments in free text

Note that the title bar gives information on the open domain, Person or Company.

The number of bottom tabs is dependent on the needs of your organization. The most common tabs are:

- **Activities**
- **Answer Forms**
- **Messages**
- **Dialogs**

For more information on these, see **Updating customer information** on page 19.

Customer Window can be customized for your organization

Your organization can decide what information to show on the top tabs, and in what order they will be sorted. Contact your System Administrator if you want to know the possibilities to change the look of the Customer Window.

More info: **Customize Customer View**.

Customer Window tabs

Window	Top Tab	Content
Person	**Main**	Contains the customer information most needed when working with the customer. Name, phone, email, sex, marriage status, registered by, registered date, customer-id.
	Secondary	For customer information used less frequently. Example is information on company linked to the person, company name, address, company-id and contact details.
	Note	Note field for writing comments in free text.
	Bottom Tab	**Content**
	Activity	Log on all activity related to the customer. Information on activity type, channel, date, direction (in/out).
	Answer form	List of answer forms linked to the customer. Information on answer form type, date registered, who registered answer, channel used.
	Messages	List of all messages sent to or received from the customer. Information on message type, name, date created, user, channel, context and send date.
	Dialog	List of all dialogs/processes the customer appears in. Information on customer processes. Dialog name, groups, context and last activity.

Window	Top Tab	Content
	Other Tabs	Number of Tabs can be customized, and can display data from a customer database or other applications like ERP, transaction systems etc.

Window	Top Tab	Content
Company	**Main**	Contains the customer information most needed when working with the customer. Company name, phone, email, website, registered by, registered date, customer-id.
	Secondary	For customer information used less frequently. Depending on the data available in domain.
	Note	Note field for writing comments in free text.
	Bottom Tab	**Content**
	Activity	Log on all activity related to the customer. Information on activity type, channel, date, direction (in/out).
	Answer form	List of all answer forms linked to the customer. Information on answer form type, date registered, who registered answer, channel used.
	Messages	List of all messages sent to or received from the customer. Information on message type, name, date created, user, channel, context and send date.
	Employees	List of all persons linked as employee to the company. Contains Name, phone, email, sex, marriage status, registered by, registered date, customer-id.
	Dialog	Log on all dialogs/processes the customer appears in. Information on customer processes. Dialog name, groups, context and last activity.
	Other Tabs	Number of Tabs can customized, and can display data from a customer database or other applications like ERP, transaction systems etc.

Searching for customers

To access a customer window with data, you will need to perform a **search** to find the customer record.

In Customer View you can search for a customer in different ways. This chapter will show you the most common searches.

Note: If there is search criteria that you feel is needed to find a customer, but is not available in the search window; please contact your System Administrator. The application can be customized to fit different search criteria.

Simple search

1. Choose the search window for the domain you want to use (Person or Company)
2. Enter a value in one of the search fields. For example: enter *Smith* in the field last name.
3. Click on **Search**, or press **<Enter>** on the keyboard to start the search.
4. The application will now return all persons matching your search criteria.
5. Double-click on a record in the result window to open the customer window.
6. If you want to change the search to other criteria, click **Clear**, and enter new criteria, then click **Search**.

Note: Search results displayed depend on how you have configured your personal search options for the domain.

Search more specified

Customer View allows you to search on all fields in a Tab. It is possible to combine a search on different fields in a Tab, or on fields from several Tabs at the same time. If your search returns to many customers, add more criteria and run the search again.

1. Choose search window for the domain you want to use (Person or Company).
2. Enter values in several search fields. For example:
   - Enter *P** in the Lastname field to find everyone with a last name starting with P (Parkinson, Peters, Peterson, etc.).
   - Enter *A** in the Firstname field to find everyone with a first name starting with A (Andrew, Andy, Ann, Anna, etc.).
3. Click on **Search**, or press **<Enter>** on the keyboard to start the search.
4. The application returns all people matching your search criteria.
5. Double-click on a record in the result window to open the customer window.

Wild cards (*) let the search option find more

The character ***** acts as a wild card when you search in text fields. It is not recommended in numeric fields. It can be used when searching for phone numbers, because phone numbers are normally held in a text field in the database.

If you know that the customer name you want starts with *Jo* but you are not sure how it ends, then use a wild card like this: Jo*

Customer View will find customers like Johannes, Johansson, Johnson, etc.

You can also instruct Customer View to automatically add * after anything you type in a search field. From the search page, access **Search Setting**. Check the **wild card** box to activate the function.

You can use * before or after your value. Keep in mind that using * before a value usually makes the search take a *lot* longer to complete, because Customer View can not use its indexes to speed up the search.

Comparatives < or > when searching for numbers

In fields that contain numbers, for example the Customer ID field or the Bonus points field, you can use the < or > symbol to search for all customers with a number below or above the given value.

For example, search using >2000 in the Bonus points field to find customers with more than 2000 bonus points.

Upper or lower case in searches

When you type values to search for, remember that **Dave** is not the same as **dave** or **DAVE** to your computer. Searches in databases are depending on the type of database your organization is using. When using Microsoft SQL Server, the database will normally return the same result if you search for **andy** or **ANDY** in the field first name. Check with your System Administrator how your system is handling upper and lower case in searches.

Drop-down list: search on values

Some fields contain standard values, e.g. country, county, address type, and sex. A drop-down list can be used to simplify the search.

All fields that have a drop-down list available are identified by a black arrow within a grey box on the left-hand side of the field. To use the list:

1. Click on the black arrow within the field.
2. The resulting window will offer a complete list of values.

   If the list contains a large number of values, a scroll bar will be shown on the right-hand side. Use the cursor to move up and down in the list.
3. Select one of the values with the cursor and click.

   The field will now contain the selected value.
4. If you do not want to restrict the search to one of the available values, click on the top of the list (blank field) and you will return to the search window without a value in the field.

Note: If you cannot find a value necessary for a search in a drop-down, contact your System Administrator to check if the list can be expanded with the needed values

Changing the look and feel of the Search Results window

Customer View allows you to configure the look of the Search Result window shown after each search. You can define the columns shown in the result, and within a search result it is also possible to sort by columns.

Note: Each domain has its own search setting.

Select the columns

From the search page within a domain, inside the box **Search Options,** click on **<Settings>.**

Use **Show Columns** to select the field values to be shown as columns in the Search Result window. To change the setting:

1. Highlight with the cursor the wanted fields from **Available columns**.
2. Use the arrows in the box to move the highlighted **Available columns** over to **Selected columns**.

3. If you want to remove fields from **Selected columns,** highlight a field and use the arrows to move the field back to **Available columns.**
4. Click <**Save & Close**>.

Select sort column

1. From the search page within a domain, inside the box **Search Options,** click on **<Settings>.**
2. In **Default sort column**, use the drop-down list to choose the field value you want to use.
3. Click <**Save & Close**>

Sort in the Search Result window

A search result is by default sorted on customer id. This can be changed in the Search Setting. If you want to sort a specific result on a different column than your default sort column:

1. Click on the Column heading to sort by this.
2. Click again to sort by opposite order.

You can sort on all columns in a Search Result window.

Note: When you sort in a list, remember that you are only sorting on the 25, 50, 75, or 100 first customers matching your criteria. (The number depends on search settings.) We recommend that if the search returns more than the maximum number in your search setting, narrow the criteria and run the search again.

Online Help

The Customer View user guide and help files is available on-line.

To view the Help on your screen, give the menu commands:

- **Help > Content and Index.** The user guide will open in a separate window.

3

Updating customer information

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Adding customer information

1. From the menu bar choose **FILE > New > Customer**.
2. Or, from the menu box under Quick create choose **Customer.**
3. A new window will open with registration fields
4. Fill in data on new customer. Note that several fields might be compulsory in order to register new customer.
5. If data is missing in a compulsory field, or the format is wrong, a red star, *, will show next to the field and an error message will be displayed in the top of the window.
6. After editing the customer data, click **OK**.

> **Note:** Always remember to run a search to check if the customer exists in the database **BEFORE** you enter a new customer. This to avoid duplicates in the database.

Person Customer

When you enter a new person customer you start with the **PERSON** fields. These fields contain default contact information as name, phone and email.

Then you move on to **ADDRESS**. A customer can be registered with several types of addresses.

Finally there is the possibility to connect **Person** with **Organization.** If the connection is made, the person will show under the tab **EMPLOYEE** (might have a different name in your organization) when opening the customer window for the associated organization. To make a connection, click SEARCH. A search window will open. Fill in the name of the company. When you have found the right organization, double-click on the name and you return to the person window.

If a field is mandatory and it is left out, an error message will be shown when trying to save.

Company/Organization customer

When entering a new Company or Organization customer, you start with the **ORGANIZATION** fields. These fields contain default contact information such as name, phone and email.

Then you move on to **ADDRESS**. A customer can be registered with several types of addresses.

After entering the customer information, click **<OK>**

A connection between company and employee must be performed from the Person domain.

Editing customer information

1. Search for the customer and open the customer window.
2. Click on the **Edit** button corresponding to the information you want to edit. There are buttons for editing customer information, categories information, and bottom-tab information.

   A new window will open.

When entering or changing data, remember to save before closing the edit window.

Note: If you as a user do not have the user-right to change data, the **Edit** button will not be visible.

3. Click **OK** to save your changes.

   If you click **Cancel**, you will return to the customer window without saving any changes.

Working with duplicate customers

Customer View can be configured to detect if a customer is registered with two or more duplicate customer records. The rules used to decide if a customer has any duplicates vary from company to company.

The duplicate check is performed each time a customer record is either created or changed as long as duplicate checking is enabled. You will get a warning if you attempt to save a customer which has any duplicates according to the specified rules.

You have the following options if you get the duplicate customer warning:

1. You can ignore the warning by pressing the *Ignore* button. The customer is saved.
2. You can cancel inserting/editing the customer by pressing the *Cancel* button. Any changes to the current customer will then be lost.
3. You can change the current customer so that it no longer has any possible duplicates.
4. You can open one of the possible duplicates by selecting it in the list and clicking the *Edit customer* button. Any changes to the current customer will then be lost.

It is also possible to check for duplicates directly from the customer page. You can do this by clicking the *Duplicate check* button. The button is only shown if duplicate checking is enabled.

When the *Duplicate check* button is clicked, possible duplicates are shown together for comparison and editing.

Editing customer information (bottom tabs)

The information on the bottom tabs can be updated with the exception of data sourced from external applications.

To edit in a tab

1. Choose the tab by clicking on the heading.
2. Click on a line to mark it, and then click on **Edit** to open in edit mode. Or double-click directly on the line to open in edit mode.

   Customer View will open a new window where you can see and edit the content. The different tabs have different edit windows.

Add a new Activity, Answer Form, or Message

1. Choose the tab by clicking on the tab heading.
2. Click on **New**.
3. Customer View will open a new window for entering the data.

Bottom tab - Activities

Each customer has an **Activity** tab. This tab shows a historical log of all communication between the customer and the company. All communication is defined as an **Activity**. There is two different ways to register an Activity:

Manual : A user of Customer View finds the correct customer, open the Customer Window and click on **<New >** under the Activity tab.

Automatically: Many different customer events can create an activity:

- A customer is in a dialog, and the dialog is set to log activity.
- A customer service representative enters a response on an Answer Form
- An email is sent to the customer from Customer View.
- A new message is registered on the customer (e.g. a letter to the customer).
- The customer is using the **Customer Profile** to edit her own data.

How to log a new Activity

See the **Add/Edit activity** for a description of how to create a new activity.

View or Edit an Activity

1. Open the customer window for the customer the activity is directed towards.
2. Click on the Activity tab and highlight the activity you want to work with
3. Click **Edit** if you want to change something or double-click on the activity line**.**
4. The activity window will open.

Bottom tab - Messages

The Customer Window has a bottom tab named **Messages**. A message is a generic term to describe all written communication with the customer. Included are Letters, Email, SMS, and FAX. A message can also be a document, like a contract or a presentation linked to the customer (Word, Excel, PowerPoint). Answer forms are not linked to Messages, but are found under a separate bottom tab.

There is two different ways to register a message:

Manual - A user of Customer View finds the correct customer, open the Customer Window and click on **<New>** under the Message tab.

Automatically - A customer is in a dialog, and the dialog sends out a letter, email or a SMS.

Create a new Message for a customer

1. Open the Customer Window for the customer.
2. Click on **<New>** in the Message tab or click on **<Message>** in the Menu box under the Quick Create box. A new window will open.

Customer View will show a message wizard that will help you to create the correct message for the customer.

3. Click on the needed Message Type and then click **Next**.

   The steps in the wizard will depend on the Message Type you choose. The steps for **Email**, **Letter**, and **Import document** are described in the following section.

Send email

There are two ways to send email from Customer View: Microsoft Outlook integration and Internal editor. The option available depends on how Customer View is configured.

Microsoft Outlook integration

1. After choosing Message Type Email, Customer View will show all available email **templates**.
2. When selecting a template, **Message name** is automatically filled in with the name of the template. You can change the name by writing in the Message name field.
3. Click **Create Message**.
4. **Microsoft Outlook** will open a new email based on the template you have chosen.
5. If the template contains merge fields (e.g. customer name), this will be filled in when the mail is opened.
6. The email is now ready for editing.
7. Send the email by clicking on the **Send** button in Microsoft Outlook. The email will be sent to the customer, and a copy will be shown under the Message tab (you might have to press the refresh button).

Internal email editor

1. After choosing Message type Email, Customer View will show all available email **templates.**

1. When selecting a template, **Message name** is automatically filled in with the name of the template. You can change the name by writing in the Message Name field.
2. Click the **Create Message button.**
3. The Internal email editor is shown in a new window.
4. Edit the email and press the **Send** button.

Create letter

1. After choosing Message Type **Letter**, Customer View will show all available letter **templates**. These are normally Word templates and RTF templates.

   Note: You can only use Word templates if you have Microsoft Word installed on your computer.

   Note: RTF templates are opened and edited in your default RTF editor. This is normally Microsoft Word, if it is installed.

2. When selecting a template, **Message name** is automatically filled in with the name of the template. You can change the name by writing in the Message name field.
3. Click **Create Message**.
4. Customer View will create a new document based on the template used, in the document's default editor. If the template contains merge fields (e.g. customers name), this will be automatically filled in when the letter is opened.

5. The document, when created, is **locked** for editing. This means that no other users can access the document for editing.
6. After you have finished writing the letter, save the changes and close the editor. The new document is now saved locally on your PC and linked to the customer.

   You have to tell Customer View that you wish to save the changes to the database.

   Customer View will display a document information box.
7. Choose **Save and Unlock document** and click **OK**. The document's changes are now saved to the database and the document will be available for all Customer View's users.

Import a document

1. After choosing **Import document** from the message type, specify the location and the file type of the document you wish to import.

   Click on **browse** to search for the correct file.
2. Click on **Import**.

   The system will copy the file and save it in the database, linked to the customer. The document is now available under the Message tab in the Customer Window.

Other messages types (e.g. SMS)

If your installation has other message types available, the options will be listen on the page for selecting a new message type.

SMS can be one of the messages types available. If you choose SMS, a window will open and you can write in the text to send.

After you have written the message, click **Send message**. The message will be sent to the customer and saved in the Message tab.

View an email

It is possible to view details and content on an previously sent email:

1. Highlight the email you want to view, and click **Open** or double-click on the message.

   A page will open showing information about the message including its name, when it was sent (**Date created**), and who sent it (**Created by**).
2. To view the message, click on the View button.

   A page will open showing the email message.

View and edit letters and documents

To view or edit a customers letter or document:

1. Highlight the document on the Message tab, and click on **Open**.

   A page will open showing information about the document including its name, when it was sent (**Date created**), and who sent it (**Created by**).
2. To view the document without editing it, check **Open document** and click **OK**.

   The document will be opened in word.

3. To edit the document, check **Edit document** and click **OK**.

   The document will be locked for other users in the database, and a local copy will be created on your PC.

   Note: When you lock a document, no other users can access the document as long as it is locked. It is important that you **Unlock** the document after you have finished editing it. When you unlock a document, your changes are made to the original document in the database, and the document is again available for other users.

4. When you have finished editing, save the changes and close the document. In Customer View you will get four options:

   - **Edit document.** The local copy of the document is opened so that you can continue to edit.
   - **Save document.** Changes made in the document are saved to the database and made available for all other users of Customer View. The document is still locked by you. You can continue to work on the document by selecting **Edit document**
   - **Save and unlock document.** Changes made in the document are saved to the database and made available for all other users of Customer View. The document is unlocked, and other users can lock the document for editing.
   - **Unlock document.** The document is unlocked. You will **lose** any changes made in the document. (This option is used if you want to discard your changes, or if you lock the document by mistake.)

   If you have finished editing the document and wish to save the changes to the database, check **Save and unlock document**, then click **OK**.

Bottom tab - Answer Forms

The **Answer Forms** tab contains a list of all answers received from the customer. Answers in Customer View include (but are not limited to):

- Surveys. Web, email and paper-based
- Marked surveys
- Employee surveys
- Telemarketing projects

The list contains the name of the questionnaire, the user who completed the answer form, and the channel used when answering the questions.

An **Answer Form** can be registered in different ways:

- The customer can register the response on the web, using an encrypted link sent by email.
- A customer service representative can enter the response in **Customer View** when talking to the customer on the phone or face-to-face.
- A telemarketing representative can enter the response in **Telemarketing Web** when talking to the customer on the phone.
- Data can be imported into the database from scanned paper-based answer forms.

On the **Answer Form** Tab, you can:

- Register a new **Answer Form**.

- View a customer's previously answered **Answer Form**.
- Open an **Answer Form** to view the detailed response on each question.

View

1. Open the Customer window for the customer.
2. Click on the bottom tab **Answer Forms**.
3. Highlight the correct **Answer Form** and click on **View**.

   The answer form is shown with the responses filled in.

   Note: When you view an answer form, the answer form is shown with all questions on one page. This might be different from how the answer form is presented when editing the answer form, where the questions might appear on several pages.

Edit an Answer Form

1. Open the Customer window for the customer.
2. Click on the bottom tab **Answer Form**.
3. Highlight the correct **Answer Form** and click on **Edit**.
4. The **Answer Form** is shown with the responses filled in.

1. If you want to change some of the responses, make the changes and click **Forward**. Repeat this for all questionnaire's pages until you are returned to the **Customer** window.

Register a new Answer Form

1. Open the Customer window for the customer.
2. Click on the bottom tab **Answer Forms** and select **New**. You can also select **Answer Forms** in the Menu box under **Quick create**.

   A window will open, showing all available answer forms.

   The field for context and dialog is only used when needed to link the response to a dialog or an activity. If your company needs to use this function, separate routines will be made available on how to use it.
3. Select the answer form by double-clicking on the relevant line, or highlight the name and click **OK**.

   An empty form is opened, and you can start filling in the answers.
4. When you have finished filling in the answers, click **Forward**. Repeat this for all the questionnaire's pages until you are returned to the **Customer** window.

   Note: It is possible to register response to the same **Answer Form** several times for the same customer (for example, if the form is used in a yearly/monthly survey). If you want to register response more than one time per customer, use the *context function*.

Bottom tab - Dialogs

The bottom tab **Dialog** shows a list of all customer dialogs/processes this specific customer is participating in.

The list contains the following information:

- **Dialog Name -** name on the Dialog/Process.
- **Group Name -** name on the group (step in the dialog) where the customer is at the moment.
- **Context** - the customers context in the dialog. Only relevant if the customer appears several times in the same dialog.
- **Entered -** time when the customer entered the dialog.
- **Last Moved -** time when the customer was last moved in the dialog.

New dialog

On the New Dialog page you can add a customer to a group in a dialog.

A customer information summary is located on the top of the New Dialog page.

To add a customer to a dialog's group, you first select the dialog i the **Select** dialog drop-down list. The **Select** group drop-down list will then populate with the selected dialog's groups. Select the group you want the customer to appear in and click on the OK button. You will then be returned to the customer page where the new dialog appears under the Dialog tab.

Context

In some dialogs it is possible for a customer to appear several times. A context is needed to separate these occurrences from each other.

The context fields will automatically be shown when you select a dialog where a customer can appear several times. Here you can specify a context manually or you can select a context from a drop-down list.

Edit dialog

On the Edit dialog page you can view information about the dialog and delete the customer’s occurrence in the dialog.

A customer information summary is located on the top of the page.

Operation history

The Operation history shows which operations have been performed on the customer in the dialog.

- **Operation Id** - the operations id.
- **Operation name** - the name of the operation.
- **Run date** - when the operation was done.

Delete operation

It is possible to delete a customer from a dialog. The customer will then no longer be represented in that dialog.

Bottom tab - Employees (Only for Companies)

This function is used to link a organization (company) in a organization domain with persons in a person domain.

Customer View can use the bottom tab named **Employees** (this might have a different name in your organization) to show the link between a company and its employees.

The list will contain information like first name, last name, phone numbers and email. From the Company domain you can double-click on a person’s name to open the Customer Window for that person.

Link a person as Employee

To make a link between a person and a company is from the Person domain.

1. Open the Customer Window for the person you want to link, Click on **Edit**
2. In the Edit window you are able to view any link made under the Company heading.
3. Search for the Company to link the person with, and Click **OK**.

Bottom tab Other groups (ERP, Orders, Agreements, Courses)

Customer View can be configured to display data from other sources in the bottom tab. For example, a **Course** tab might be linked to a course system and list courses the customer has participated in or registered for.

Bottom tab - Employees (only for Companies)

This function is used to link an organization (or company) in a organization domain with persons in a person domain.

Customer View can use the bottom tab named **Employees** (this might have a different name in your organization) to show the link between a company and its employees.

The list will contain information like first name, last name, phone numbers and email. From the Company domain you can double-click on a person's name to open the Customer Window for that person.

Link a person as Employee

To make a link between a person and a company is from the Person domain.

1. Open the Customer Window for the person you want to link, Click on **Edit**
2. In the Edit window you are able to view any link made under the Company heading.
3. Search for the Company to link the person with, and Click **OK**.

Bottom tab Other groups (ERP, Orders, Agreements, Courses)

Customer View can be configured to display data from other sources in the bottom tab. For example, a **Course** tab might be linked to a course system and list courses the customer has participated in or registered for.

Understanding categories

A category is domain dependent. There can be different category types and values for a Person and Company. For all domains, there are 4 types of category to choose from:

Category	Description
Standard category	The customer can belong (or not belong) to a category. E.g.: Newsletter.

Category	Description
Category with a value	This type has a value connected to the category. E.g.: an interest category like **Investment.** The values can be set as multiple choices, making it possible to have several values for one category on the same customer. E.g.: **Investment >** Shares / Bonds / Real estate.
Score-category	A category can be linked with a value. This can be used for credit-score, segment-score or grades from courses. The value can be set, within an interval, for each category. (E.g.: 1-10. 1-100, A-D).
Blocking category	This category is used to control communication with the customer. The customer can also use this in order to guard against messages in one channel. E.g.: No phone, No TM, No SMS, No advertising.

If you need other categories or values

In order for a customer classification system to work, it has to be planned, and to make sense to all the different people and groups who use it.

Once you are sure what you need, ask your system administrator to create the new categories and values in Customer View Admin.

Using a category to describe a customer

1. Make sure that you are displaying the customer you want to work with.
2. On the right-hand side in the customer window there is a **Category** box.
3. Click on the **Edit** button.

   A new window will show the category types available for your company.
4. Choose a category.
5. If the category has a value, enter the correct value.
6. Click on **OK**.

4

Tasks and activities

In this section:

- Introduction 32
- My tasks screen 32
- Add or edit activities and tasks 33

Introduction

An activity can be assigned to a user or user group along with a deadline date. Once an activity is assigned, it is referred to as a task and can be viewed on the **My tasks** screen.

My tasks screen

You can view your current task list by clicking **My tasks** on the left menu.

All tasks listed on the **My tasks** screen page correspond to an activity that you you need to follow up on. The tasks are sorted by **Follow up date**, and are are formatted to show if they are unread (red text) or overdue (bold).

Show tasks drop-down menu

The **Show tasks** drop-down menu at the top of the screen allows you to filter which tasks are shown in the list. The default items shown in the menu are:

- **All tasks** - Shows all due tasks
- **Overdue tasks** - Shows all tasks that are overdue
- **Done tasks** - Shows the tasks marked as done
- **Due today** - Shows the tasks that are due today
- **Due in seven days** - Shown tasks that are due in the next seven days.

Note: Your System Administrator might have created extra elements that appear in the drop-down menu.

Task buttons

The Task buttons located at the bottom of the screen allow you to action a task.

- **Open task** - Opens the selected task in the Edit activity page. A task can also be opened by double-clicking on it.
- **Delete task** - Deletes the selected task permanently.
- **Mark as read** - Marks the task as read. The task will then no longer be shown with bold text in the list.
- **Mark as done** - Marks the task as done. The task is then moved to Done task list, which is accessed from the **Show tasks** drop-down menu.
- **View customer** - Opens the customer the selected task is associated with.
- **Print tasks...** - Opens a window to print a task summary.

Done tasks

The **Mark as read** and **Mark as done** buttons are not available when viewing **Done tasks**.

The options for editing a done task are also quite limited. Only the **Notes** field and the **Done** field are enabled. It is however possible to enable editing again, but then you have to first set the **Done** field to **No**, save the task, and then select **All tasks** from the **Show tasks** list and open the task.

Add or edit activities and tasks

The **Edit activity** window is used to edit both activities and tasks. Tasks use the same fields as activities, but also have some additional fields.

Activity description fields

In the **Activity description** section, The activity type is:

- editable when creating a new activity
- non-editable when viewing an existing activity

Other activity types also show a **Quick select** drop-down menu, where you can choose between some already specified descriptions. When the **Quick select** menu is shown, you might also have the option to enter a description manually, or you might only be able to select a description from the **Quick select** menu.

Task fields

Task fields including: **Follow up group**, **Follow up by**, **Follow up date**, **Follow up time**, are only enabled when the activity is set to be followed up.

To select a follow-up date for an activity, use the **Follow up in** drop-down menu. Select **Follow up activity** to select the follow-up date manually, or select one of the other options to follow up the activity in a predefined time span.

Note: The different time span options in the **Follow up in** drop-down menu are configurable and might vary.

Task fields are enabled after an item is selected in the **Follow up in** drop-down menu.

In addition to the **Follow up date** and **Follow up time** fields, it is possible to assign the task to a group and/or a user. The default is the user currently logged in.

To assign the task to a group, select the group in the **Follow up group** drop-down menu. To assign the task to a user, first select the group the user belongs to (or **Users outside workgroups** if the user does not belong to a group). The **Follow up by** drop-down menu will then contain the users belonging to this group.

If the task is assigned to a user then the user will find the task in his or hers **My tasks** list. If on the other hand the task is assigned to only a group or too no group or user at all, then the task will not show up in a users **My tasks** list until a task distributor or another user assigns this task to a user.

To mark a task as completed, select **Yes** in the **Done** field. Fields for selecting the done date and time are then shown with the current date and time as default.

When a task is marked as done and saved, it will no longer be available from your **My tasks** list. The task is the moved into the **Done tasks**, which can be accessed from the **Show tasks** drop-down menu on the **My tasks** page.

Advanced fields

The advanced fields are hidden until you press the **Show advanced fields** button.

The **Context/Dialog** field is only editable when creating a new activity. When viewing an existing activity, the context and the related dialog (if one is set) are displayed with read-only fields. There are four options when selecting **Context/Dialog**:

- **None** - No context is selected and the activity is not related to a dialog. The context gets a default value of '0'.
- **Relate to dialog** - When selecting this option you can choose to relate the activity to a dialog. A drop-down menu is shown with all dialogs the current customer appears in. The text string before the hyphen on each item in the menu is the customer's context in that dialog.
- **Set context** - By using this option you can specify the context yourself. Simply type in an appropriate string.
- **Select context** - When selecting this option you get a drop-down menu where you can choose a context. In the list you can choose the current date, the current date and time, or one of the other contexts the customer already is used with.

The other advanced fields cannot be changed and are not given a value before the activity is created.

Communication fields

Communication fields specify the form of communication that initiated the activity and whether it was initiated by the customer or your organization.

Related to fields

Related to fields specify whether an activity is related to another activity or is in response to a communication.

There are three options:

1. **None** - The activity is not related to another activity and is not a response to a communication.
2. **Activity** - When selecting this option you get a drop-down menu containing the customer's other activities. The menu shows the names of the activities, with the activity types in parentheses. The activity id is shown instead of the name if no activity name exists.
3. **Public communication** - When selecting this option you get a list of all defined public communications. What this option is is best illustrated by an example: Your organization has just had an ad in the local newspaper and a customer calls because of this ad. By selecting 'newspaper ad' (this has to be created previously by your System Administrator) in the 'public communication' drop-down menu, you can specify that this activity is a direct result of the newspaper ad.

5

Customize Customer View

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- Configuration changes - System Administrator 36
- Configuration changes - end user .36

Introduction

Customer View is a very flexible application. If there is something that does not suit the way you work, there is a good chance that it can be changed: either by you, or by your System Administrator.

Configuration changes - System Administrator

Customer View can be configured to suit your group or company by your System Administrator or consultant. Advanced configuration possibilities include, but are not limited to:

- Set different fields visible for different groups.
- In most drop-down lists, change the names of values, add new values, or remove values.
- Change field names in all windows.
- Change text in headings for Windows and menu boxes.
- Change the order the fields are displayed in a window.
- Define the fields that are mandatory when entering a new customer.
- Define mandatory format for a field (e.g.: Birth date must be written dd.mm.yyyy)
- Add new or remove existing Top Tabs in the Search Window.
- Add new or remove existing fields within a Tab in the Search Window.
- Add new Bottom Tabs in the Customer Window. Customer data can be displayed from the customer database or other systems within or outside the company.
- Start any frequently used application from Customer View, taking the current customer with you
- Change colors and look of the application.

Configuration changes - end user

All changes here will not affect other users, and will follow your login to other PCs. All changes can be edited at any time.

From the menu bar you can choose **Tools, General setting.** The following changes are possible:

- **Set default domain**. The drop-down list shows the available domains. Choose the domain you want as start domain. Next time you log in, you will automatically start in the default domain.
- **Start page**. Choose from the drop-down list what page (within the default domain) you want the application to start after login. Options are:
  - **Start Page**
  - **Search Page**
  - **Last Customer**

- **Language**. Choose the language in Customer View. **Note!** Some field names are defined in a global setting for your organization, and will not be affected by the change of language in Customer View.

From the menu bar you can choose **Tools, Page setting.**

In the right menu of the Search page within a domain, you can choose **Page Settings** > **Settings**.

The following changes are possible within Search Settings:

- **Use Wildcard** - If this is checked, the search function will automatically fill in ***** after a search is started (only for text fields). This will increase the chances of finding the customer in a search.
- **Show total result** - Displays the total number of customers matching your search in the search result heading. (Note: If a search matches 120 customers, only the first 25, 50, 75, or 100 of them will be displayed in the search result window.)
- **Show columns** - Select which columns of customer data are to be displayed in the Search Result window.
- **Default sort column** - Define the column the search results will be sorted by, e.g. Firstname or Lastname.
- **Max number of rows** - Lets you define how many customer records will be displayed in the search result window after a search. Choose between 25, 50, 75, and 100 customers. An increased number of customers in the search window will affect the speed of the search.
- **Wrap text in grid** - Long text or values in a field will be shown in several rows in order to view the full content. This only affects the Search Result window.

6

Glossary of terms

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Glossary of Terms

Activity

An **activity** is an action towards a specific Person or Company, for example a letter, email, telephone or SMS. Activities may be created manually by any user or generated automatically by a dialog created with the Visual Dialogue application.

Admin program (The Dialogue Admin program)

System administration module. In the Admin program, advanced users can modify reports and work directly with database tables. System administrators can define Customer View users and groups, and set up how Customer View will work with other applications. Admin is also used to fill many of the pre-defined look up tables in the Customer View, and to establish your own companys set of customer categories and permitted values for each category.

Answer form; Questionnaire

The marketing manager defines a **questionnaire**. A questionnaire is a group of one or more questions. The questions may have predefined answers for the customer to select from, or spaces for free text answers. Individual customers answer the questionnaire. The answers given by one customer to one questionnaire are stored in an **Answer form**.

Dialog

A **Dialog** is quite simply a tool for planning, carrying out and keeping track of 1:1 market communication with large numbers of customers. It is created in the Visual Dialogue program, another program in the Portrait Dialogue Software suite of which Customer View is one member.

Company

A customer company, business, organization or organizational unit registered in the Customer View database. A company might have any role in relation to your organization. It might be a customer or a supplier or a competitor, or a regulatory agency.

Departments, branches, divisions or your own organization can also be registered as companies.

Persons in the Customer View database can be placed within companies by being registered as Staff within a company. Persons can also be associated with a company through Relationships.

Customer

In Customer View, a term used when what is being described is the same both for Person and for Company. For example In a Customer window (Person or Company) click on one of the bottom tabs to go to the Relationships page.

Customer View

Application in the Portrait Dialogue suite. This application is used by end-users to view, add or update customer records and to schedule and follow up on communication with customers.

Document

A letter, report, invitation, fax or the like sent to a Customer or relating to a customer.

One-to-One marketing

A form of marketing that differs from traditional mass marketing. In One-to-one marketing, the supplier aims for more effective communication with the customer by capturing and appearing to "learn" from each customer response. In this way the supplier is soon able to give huge numbers of customers the feeling of being treated and responded to as individuals.

Person

An individual customer, user, agent, contact, staff member of a company customer, etc. registered in the Customer View database.

Persons in the Customer View database can be associated with other persons through relationships and group membership. They can be associated with companies in the same way, and by being registered as staff for a company.