

NEWTON CIATM **Administrator's Guide**

Version 1.29

©1997-2014 Newton Computing Corporation

Microsoft®, Windows® and Word® are registered trademarks of Microsoft Corporation.

Table of Contents

<i>Introduction</i>	3
Section 1 — Essential Configuration	
Chapter 1: Company Master.....	8
Chapter 2: Advisor File Maintenance.....	19
Chapter 3: Fiscal Periods.....	24
Chapter 4: Location File Maintenance.....	26
Chapter 5: Issue File Maintenance.....	29
Chapter 6: Finding File Maintenance.....	31
Chapter 7: Product/Lot/Threshold File Maintenance.....	33
Section 2 — Features With Defaults You Can Customize	
Chapter 8: Case Status File Maintenance.....	42
Chapter 9: Method File Maintenance.....	44
Chapter10: Reason For Contact File Maintenance.....	46
Chapter11: Customer Type File Maintenance.....	48
Section 3 — Optional Features	
Chapter12: Enclosure File Maintenance.....	50
Chapter13: Enclosure Group File Maintenance.....	53
Chapter14: Letter Paragraph File Maintenance.....	56
Chapter15: Letter Contents File Maintenance.....	60
Chapter16: Reference Center File Maintenance.....	63
Chapter17: Survey File Maintenance.....	67
Chapter18: Warranty Claim Status & Disposition File Maintenance.....	70
Chapter19: Agent File Maintenance.....	72
Chapter20: Product Hierarchies File Maintenance.....	74
Chapter21: Issue Hierarchies File Maintenance.....	77
Chapter22: Advisor Hierarchies File Maintenance.....	80
Chapter23: Location Hierarchies File Maintenance.....	83
Chapter24: User Defined Fields.....	86
Chapter25: News Files Maintenance.....	89
Chapter26: Canadian Province File Maintenance.....	91
Chapter27: U.S. State File Maintenance.....	93
Section 4 — Other Topics	
Chapter28: Backup.....	95

Introduction

* * * * *

Welcome to Newton CIA (Customer Intelligence Administration). The contents of this manual are step-by-step instructions to assist you in administering your software package. Each subject is divided into its own chapter, allowing you to start at the beginning, or to select only those areas that will be applicable to your needs.

If you are configuring a new company in Newton CIA, certain chapters must be completed prior to others. We have tried to simplify this process by organizing the manual in the order in which the chapters need to be completed. Also, since many of the features in the software are optional, we have divided the manual into three sections: the first section covers setup that is essential to Newton CIA; the second covers features that come pre-configured, but which you might want to customize; and the third covers the optional features.

We have included a tool to organize and simplify your configuration work, called the Configuration Aid. It's available under the Admin menu in File Maintenance. Before you use it, you must create a new company in Company Master Maintenance (Chapter 1). Then sign off of Newton CIA, and sign right back on using your new company and your ADMIN or the DEMO user ID. Go to the Configuration Aid, and it will help you complete your configuration tasks in the right order, track which ones you have started, and which ones you've completed.

We have tried to include the topics and hints that would allow experienced software users to configure Newton CIA on their own, but Newton Computing Corporation does offer consulting services to assist in configuring the software.

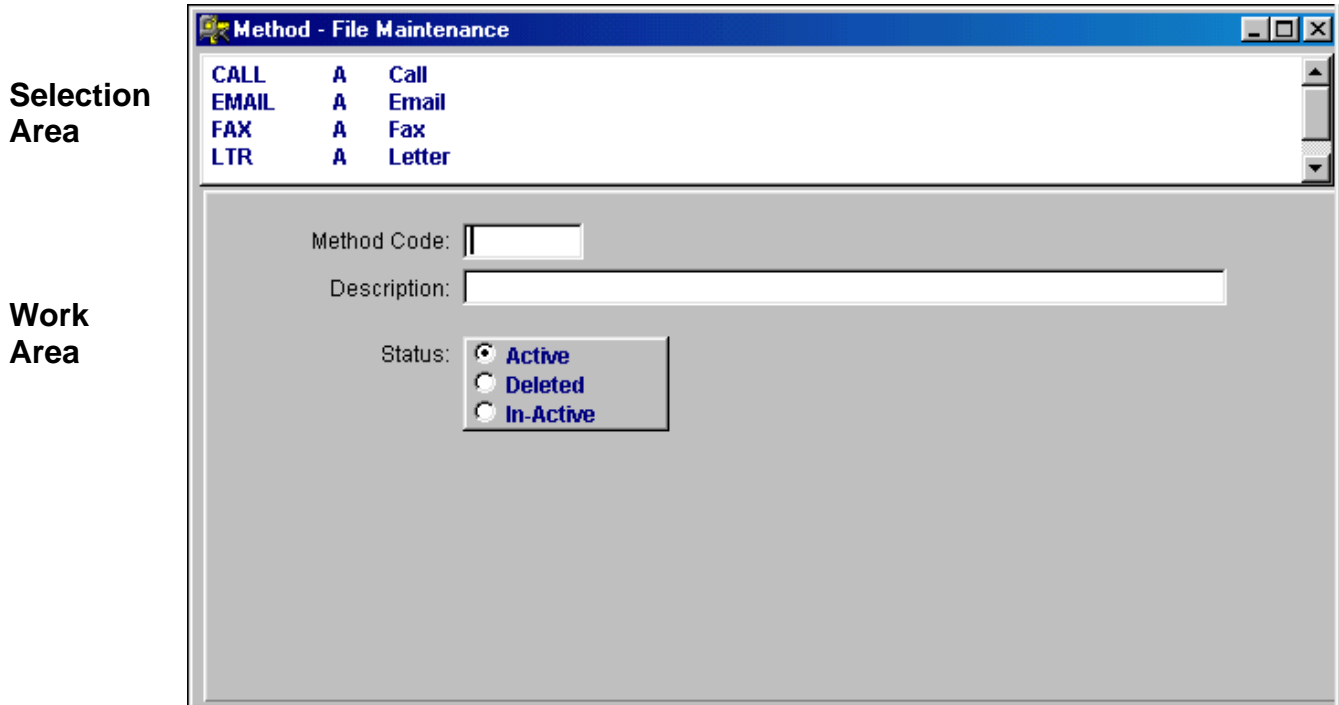
Some sections of each chapter will have a repetitive feel, mainly in describing how to get to the appropriate maintenance window. This was done under the assumption that some configuration changes will always occur long after initial setup of Newton CIA, and those memories of the configuration process will have faded, or administrators will have changed.

The rest of this introduction will cover the common mechanics of the file maintenance windows you will use in configuring Newton CIA, along with the use of a housekeeping function that your software administrator will need occasionally.

We would like to take this opportunity to thank you for selecting Newton CIA and wish you much success.

Using the Maintenance Windows

All of the file maintenance windows in Newton CIA have the same basic structure. Each has two sections. Below is an example window.



The top section, comprising a quarter to a third of the window, is called the selection area. It has a listing of the codes (or other items) already in the file, with one row for each code. A scroll bar on the right allows you to move through the rows, or you can use the "Position To" button on the tool bar, which is described below. It you click on a row, the details of that row will be loaded into the lower portion of the maintenance window, called the work area.

The work area is where you change or add a new code. For each piece of information, there will be a small box (called a field) where you type in a value, a toggle box or some other device for recording your selection. Some of these pieces of information will be required (mandatory), and are designated in blue with an underline. Others are up to your discretion.

Many maintenance windows have a toggle box with the values "Active", "Deleted" and "In-active". Normally you will leave them on "Active", so that the current code is available in Case Entry. The other two settings remove the current code from Case Entry, while leaving the record defined in the maintenance file. This is for situations where you have been entering a code in previous cases, but no

longer want it to be used. The definition must remain available so that reports selecting cases with the old code can draw on its definition.

If you have retrieved an existing code from the selection area, the code itself will have a gray background, and be protected (inaccessible).

There may be buttons within the work area that provide functions specific to the window's particular maintenance needs. Some of these buttons will be available when you are initially adding a code, others won't be (but will explain that they are not).

Maintenance Functions

The actions you can perform on the information recorded in the work area are provided by buttons on the tool bar above.

They are called function buttons. Some are common to all of the maintenance windows, others are not. Their names and purposes are as follows:



Save/Update — This button saves newly input or updated information. It must be used to retain your work.



Cancel/Clear — Clears the current work area from the window, without saving any new or changed information.



Add a Record — Loads a blank entry form to the work area of the screen, so that you can enter a new code or other item.



Delete — Removes the current code or other item (which must be loaded in the work area) from the file. This button is only available on windows from which it is appropriate to delete a code.



Position To — Allows you to set the upper (selection) window to a code or item you want. A small window will pop up, into which you type the value you want, and then click the "Go To" button.



Print — Prints the contents of the work area to your selected printer.



Close Maintenance Window — Closes the current maintenance window, without closing File Maintenance altogether. Most file maintenance windows display within the main File Maintenance window, and will have this button on the tool bar about. A few of the file maintenance windows open up detached, as their own independent windows, and will not have this button.



Exit — Closes File Maintenance, or a detached maintenance window.

Removing Case Locks

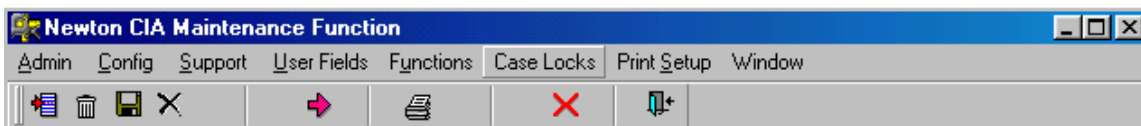
In tracking your customer contacts, Newton CIA assigns a unique number to each case. This number allows you to reference a case conveniently, but also allows the software to control access to the case. If one of your advisors (users) has a specific case loaded into Case Entry, Newton CIA excludes any other advisor from pulling that case up in Case Entry. This is called “locking” the case.

Occasionally, the advisor’s PC or workstation may crash, due to a power outage or other problem. When this occurs, any case the advisor was working on, but had not saved, will experience problems. If the case was new, it will be lost altogether, because new cases are only assigned a number and written to the database when the Save button is used. If the case was an existing one, being updated, then all changes made will be lost, and the case will remain locked.

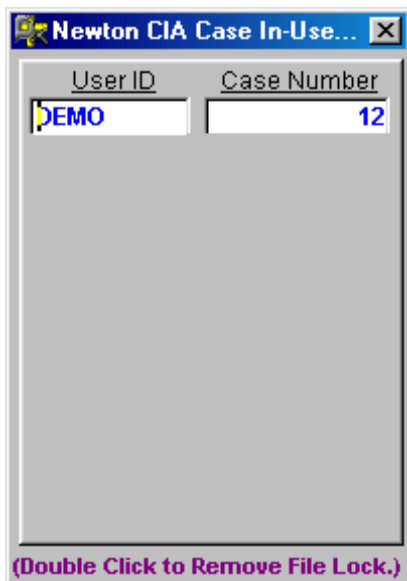
The advisor will need to re-enter the lost information. For a new case, they will simply need to open Newton CIA again, and start afresh.

For an existing case, however, the case must be unlocked before the advisor can attempt to enter the changes again.

Any user with access to File Maintenance (we recommend you restrict this to one or two software administrators) can remove a case lock. The function is found on the menu bar in the main File Maintenance window.



It brings up the following window:



Simply double click on the row listing the case

number whose lock you want to remove. Then close the window.

Leave other lock records on the display alone — removing them would undercut the proper function of Newton CIA.

Chapter 1

Company Master

In This Chapter We Will Cover:

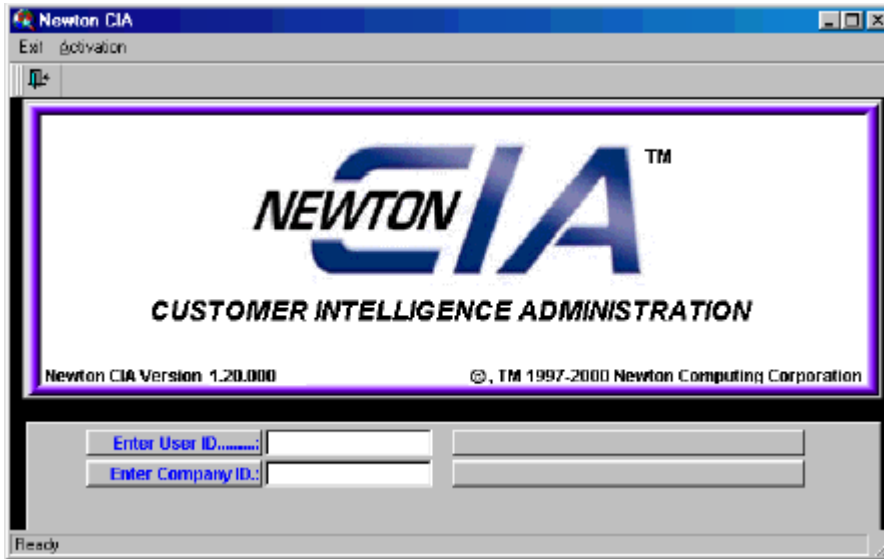
- Getting Started
- Creating your company in Company Master Maintenance

Prior to collecting customer information, it is important for the System Administrator to input basic information into Newton CIA. The first thing you'll need to do is to create a company description. This description will not only identify your firm as you enter information into Newton CIA, but it will also govern how many of the features in the software operate. Take your time while setting up your company, and consider the many options you have to choose from. Of course, you can always come back later to change your company setup, if you want things to work differently.

In this chapter, we'll assume this is the first time you've entered Newton CIA, so we will step you through from the very beginning. In later chapters, we'll start from the File Maintenance screen.

Starting Newton CIA

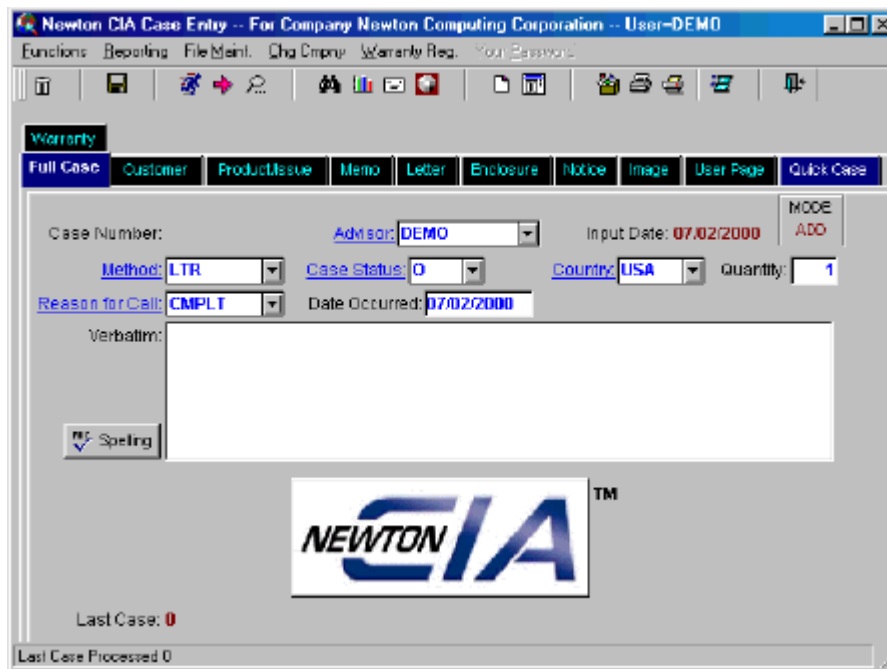
When starting Newton CIA, the following screen should appear:



1. Enter the word DEMO into the User ID field. Tab once and type Demo in the Company ID field. Tab a second time and your screen should look like the following:



2. Click the button at the bottom of the screen labeled Fast Path. The Newton CIA Case Entry screen for company Cycle Time will appear. The screen should look like the following:



This is the Newton CIA Main Case Entry Screen.

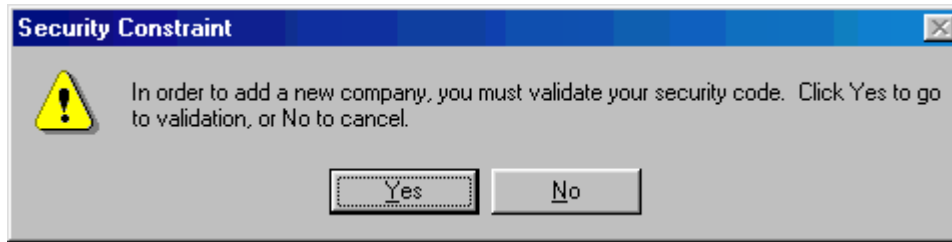
We are now ready to begin the process of entering the company information for your organization.

1. With your mouse, click File Maint. at the top of the screen.
2. Click Admin on the File Maintenance menu bar.
3. Select Company Master to begin entering your organizational information.

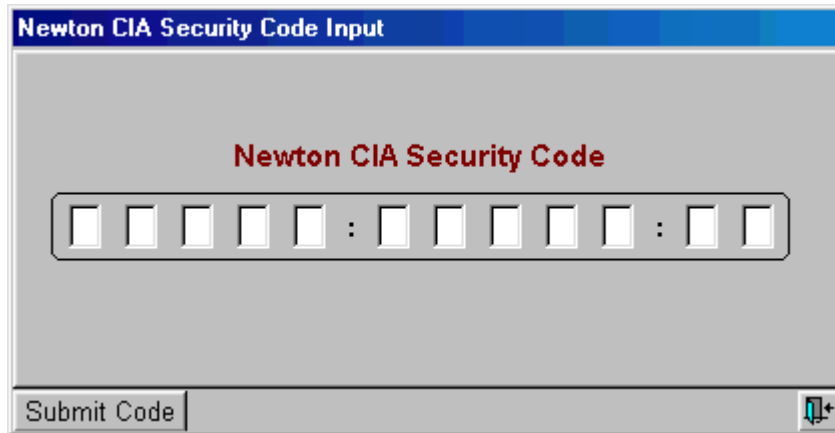
Newton CIA will allow you to create multiple company environments. To add your organization to the Company Master, select the “Add a record” icon located at the far upper left of the tool bar.



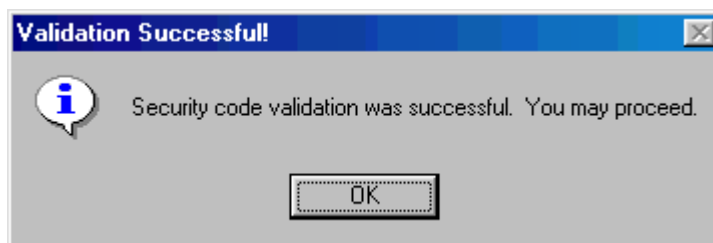
The following message will appear. Click yes to validate your security code.



4. The following security screen will appear. Enter the security code provided with your software package in the spaces provided. Select "Submit Code" to continue.

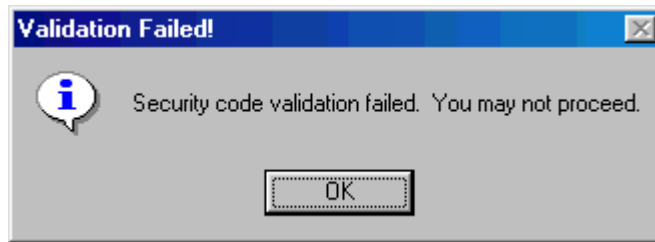


If the security code is entered correctly, the following Validation Successful message will appear:



Select OK to proceed.

If the Security code is not entered correctly, a Validation Failed message will appear. If you encounter this message, please reenter your security code and select “Submit Code”



5. Select the “Add a record” icon to begin entering your Company information. The icon appears at the upper left of the tool bar.



The following screen will appear.

A screenshot of the "Newton CIA Company File Maintenance" application window. The window title is "Newton CIA Company File Maintenance". Below the title bar is a menu bar with "Exit", "Functions", and "Printer Setup". A toolbar contains several icons, including a plus sign. The main area displays a list of companies: "CIBA CIBA Vision", "DEMO Newton Computing Corporation", and "XYZ XYZ Incorporated". Below the list are tabs for "Name and Address", "Processing Defaults", "Tab Defaults", "Screen Defaults (1)", and "Screen Defaults (2)". The "Name and Address" tab is active, showing a form with fields for "CompanyID", "Name", "Address", "City", "State", "Zip Code", "Country" (set to "USA"), "Main Telephone", "Fax Phone", "Email Address", and "Status" (with radio buttons for "Active", "Deleted", and "In-Active"). The status "Active" is selected. The bottom left corner shows "Ready".

Note: When entering area codes and telephone numbers, do not type the brackets () for the area code of the space in the telephone number. Newton CIA will do that for you when you tab out of the field.

6. Begin by entering a company ID in the space provided. The ID can be up to 5 characters in length.
7. Next, complete this screen by entering the rest of your company information.
8. After completing the information listed under the Name and Address tab, select the "Processing Defaults" tab. The following screen will appear.

The screenshot displays the 'Processing Defaults' configuration window. At the top, there are five tabs: 'Name and Address', 'Processing Defaults' (selected), 'Tab Defaults', 'Screen Defaults (1)', and 'Screen Defaults (2)'. The main area contains the following fields and controls:

- Fiscal Periods:** 'Number Fiscal Periods' is set to 12. Below it are four input boxes for '1st Q End Period' (3), '2nd Q End Period' (6), '3rd Q End Period' (9), and '4th Q End Period' (12).
- Tracking and Security:** 'Enable Lot Number Tracking' is set to 'Yes'. 'Auto Repeater Check Flag' is set to 'Off'. 'Password Required' is set to 'No'. 'Min. Password Length' is 0. 'Password Expiration' is blank.
- Case Management:** 'New Case Status' is 'O', 'Closed Case Status' is 'C', 'Reason' is 'CMPLT', and 'Method' is 'LTR'. 'End Customer Type' is 'CUS'. 'AS400 JOBQ' and 'AS400 PRTQ' are blank.
- File Locations:** 'Letter Generator' is 'Text Editor'. 'Default WP Program Location' is blank. 'Default Letter File Location' is 'C:\CIA\LETTERS\'. 'Default Image Location' is 'C:\CIA\IMAGES\'. 'Default Quick Case Security Level' is blank.

Processing Defaults have been pre-selected. You may chose to modify any of this information to fit your organization's needs.

The Fiscal Periods section needs a basic definition of your companies structure for reporting quarterly information. You will define your Fiscal Periods in further detail in another file maintenance area.

If your firm tracks lot numbers for its products, set the Enable Lot Number Tracking field to Yes. This will make lot number information and threshold reporting features available in Newton CIA. The Default Unknown Lot Number value is only useful if you have enabled lot number tracking. This is the value your advisers should enter if the customer can't provide the lot number. It must be defined here for use by the threshold reporting feature. You will also need to define a lot number record using this value for every product you wish to track in the threshold reports (see Lot Number Maintenance).

The Auto Repeater Check determines whether the Repeater Check (see the Newton CIA User's Guide) is automatically run for each individual entered into the Customer tab of Case Entry.

In the security section, the primary decision is whether you want to require each user to use a password to logon to the system. If you set this to "Yes", you'll need to decide the minimum length of the password, and whether to enforce a periodic change of password on each individual.

The Default Quick Case Security Level is only needed if you assign case security levels based upon Case Status Code. Please see the chapter on Case Status Codes for more information.

The Letter Generator check box lets you choose how letters requested in the Case Entry Letter Tab are created. The Text Editor is a limited function tool that you can use if you don't have Microsoft Word. Use MS Word if you want to make style changes in the letters generated.

In the field labeled "Default WP (Word Processing) Program Location", enter in the path to Microsoft Word (usually C:\Program Files\Microsoft Office\). Newton CIA can use application programming interfaces to MS Word in order to provide enhanced functions.

The field labeled "Default Letter File Location" lets you specify where letters attached to cases will be stored. If you have a networked installation and the drive letters don't match, you can work around this problem by placing a text file called DRIVEMAP.CIA in the CIA folder of PCs affected. In the file, you can map up to 5 drive letters. On the first line of the file, simply put the letter of the server drive, followed by the letter as its known locally on the PC. For example, if you place DEEG on the first line, Newton CIA treats files on server drive D as being on local drive E, and server drive E as local drive G.

The "Default Image File Location" lets you specify where image/text documents attached to cases will be stored. The DRIVEMAP.CIA file described above works here, too.

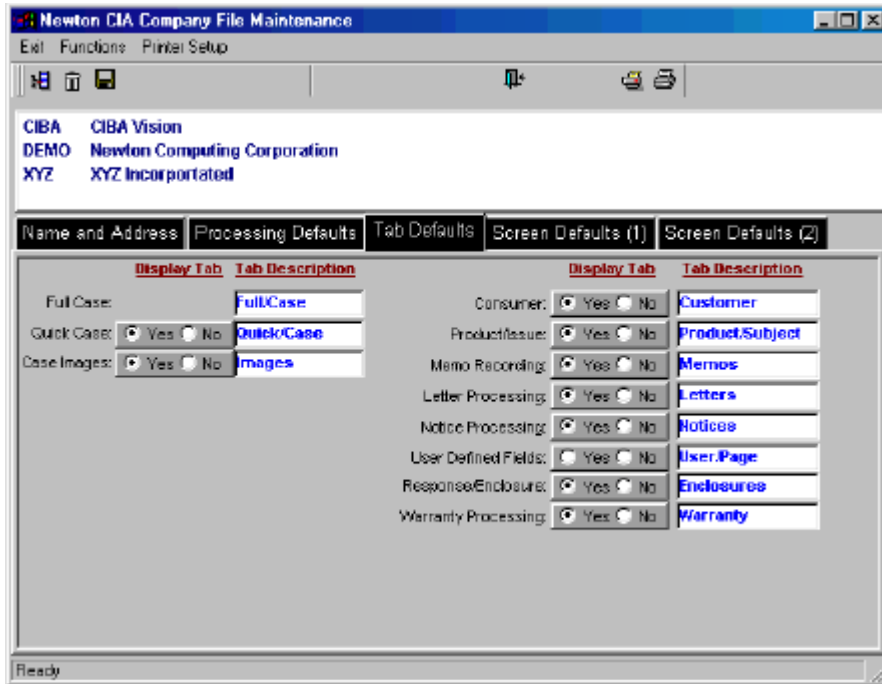
You will be selecting a number of default codes from drop down lists as you complete this screen (for example, the New Case Status). Most of these determine the value for that code which is assigned when an advisor opens a new case in Case Entry. The exception is the Closed Case Status, which is used by certain features of Newton CIA that need to know how you define a closed case. Your choices for these defaults will be limited to values that come standard with Newton CIA. Later, after you have customized these code values for your own uses (using the other file maintenance features), you can come back to this screen and select from the values you have created.

Finally, values in the "AS/400" fields are only necessary if you are using an AS/400 as your database server.

- After completing any changes you wish to make to the Processing Defaults window, select the “Tab Defaults” tab.

Tab Defaults have been pre-selected and may be modified to meet your needs.

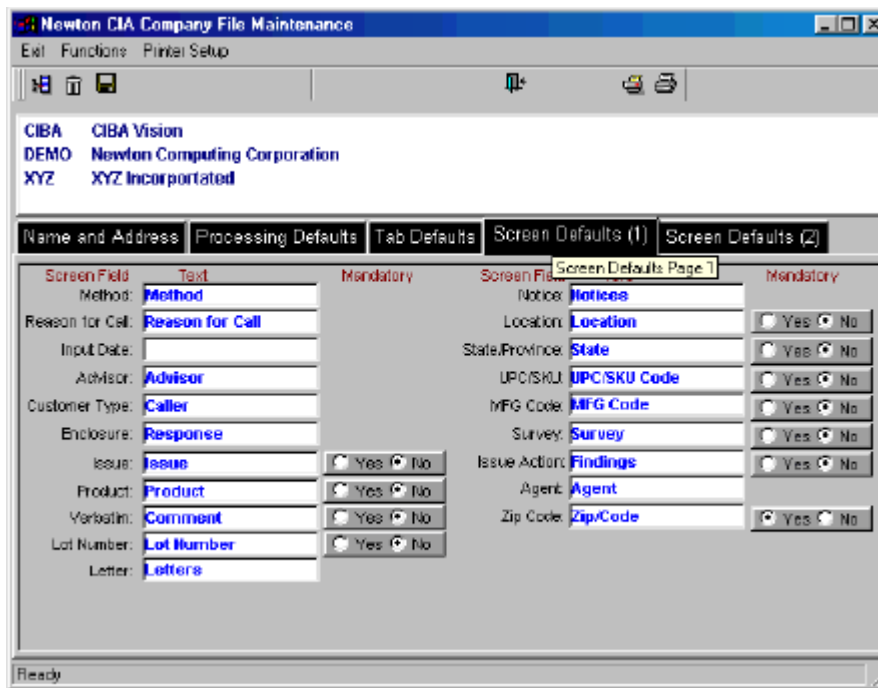
The Tab Defaults screen looks like the following:



Tab Defaults are the descriptions of the Tabs for each section of Case Entry in Newton CIA. These tab descriptions can be modified, as mentioned above, but we recommend that you keep them relatively short.

if you don't want to use one of the Tabs, just click “No” in the Display toggle box for that Tab.

10. After completing any modifications to the Tab Defaults window, please select the “Screen Defaults 1” tab. The window should look like the following:

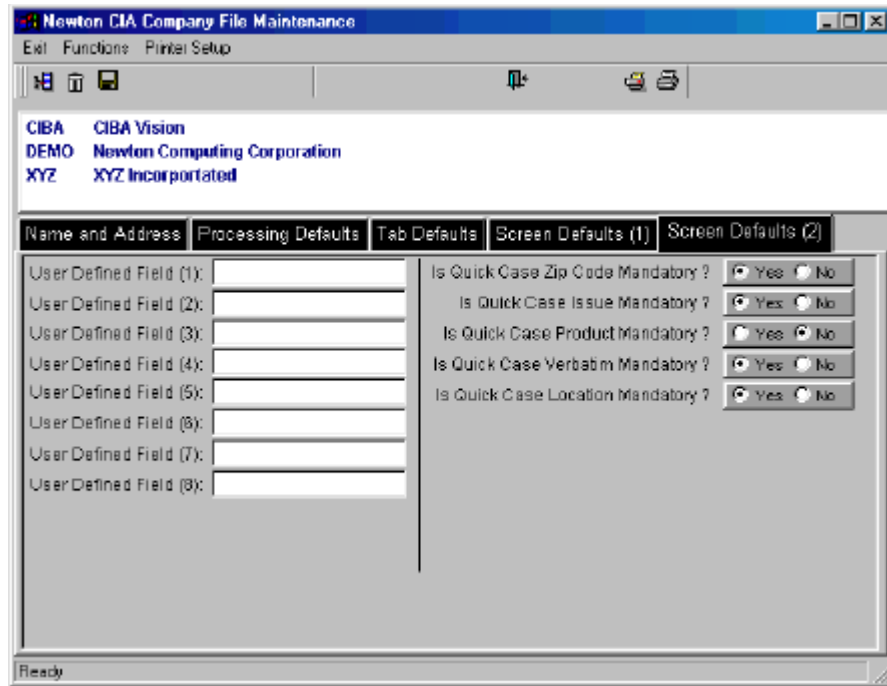


The information in the Screen Defaults 1 window has been pre-selected and can be modified. Certain pieces of information captured in Newton CIA can be discretionary or mandatory.

Note: If you select mandatory for any of the fields listed in this screen, the advisor(s) will not be able to process the record in Case Entry until data has been typed in or a selection is made for that field.

(I.e. if you select “Product” as a mandatory field, the advisor(s) must select a product in Case Entry before they will be able to process the record).

11. After completing the Screen Defaults 1 tab, please select the Screen Defaults 2 Tab. The Screen Defaults 2 window looks like the following:



The User Defined Field area is for establishing the title (purpose) of the individual entry fields in the User Fields tab of Case Entry. If you don't fill one of them in, then it will remain undefined on that tab.

Information in Newton CIA can be captured as a Full, or as a Quick Case. Most companies use Quick Case for basic inquiries from customers. They utilize this feature when they don't need the Customer's name and address but wish to capture basic information.

Full Case is used to capture product or service related complaints where Customer information (name, address etc.) and other details may be needed. In Screen Defaults 2, you can make the Quick Case fields discretionary or mandatory.

Note: Most organizations do not make the Quick Case Verbatim field mandatory. Please assign this field based upon your organizational needs.

12. After completing the Screen Defaults 2 window, it is now time to save your Company Master Information. Using your mouse, click the diskette icon listed on your Company Master toolbar.



You have successfully created a company master record. Newton CIA allows you to set up multiple companies. This feature allows different functional areas of your organization to track information with one software package.

If you wish to create multiple company environments within Newton CIA, repeat the steps in Chapter 1.

Note: Changes to Newton CIA will only take effect once you completely exit out of the software.

Please exit out of Newton CIA at this point so your Company Master changes will take effect. You will need to signon using your newly created company to do the rest of your configuration work.

Chapter 2

Advisor Maintenance

In This Chapter We Will Cover:

- Adding Advisors (also called Users) to Advisor Maintenance.

Advisors are employees that will be collecting and inputting information into Newton CIA. Before adding advisors, your company environment must be created in the Company Master File. Advisors can be assigned to one or multiple company environments in Newton CIA. For this reason, the Company Master must be completed first.

Please see Chapter 1 for instructions on how to create a company in the Company Master File.

Now that your company has been created in the Company Master File, let's move on and add your employees as advisors.

1. Click Aadmin on the File Maintenance menu bar.
2. Select Advisor File Maintenance.

To add an advisor to Advisor Maintenance , select the "Add a record" icon located at the far upper left of the tool bar.



3. The Advisor Maintenance Screen should look like the following:

User Id	First Name	Last Name	MI	Status
DEMO	Joe	Doaks	D	A
JANE	Jane	Doe		A
JOHN	John	Doe	D	A
SAM	Sam	Crane		A

Base User Profile
Processing Defaults

Advisor ID	First Name	MI	Last Name	Status
DEMO	Joe	D	Doaks	<input checked="" type="radio"/> Active <input type="radio"/> Deleted <input type="radio"/> In-Active
Signature to print on Letters: Joe Doaks Sr.				AS/400
Title to print on Letters: Consumer Representative				OUTQ
Department to Print on Letters: Consumer Affairs				PRT01
Closing to print on Letters: Sincerely Yours,				JOBQ
Email Address:				QBATCH
Change Case Security Level:	4			Change Only Own Cases: <input type="radio"/> Yes <input checked="" type="radio"/> No
Display Case Security Level:	4			Display Only Own Cases: <input type="radio"/> Yes <input checked="" type="radio"/> No
Password:	*****			Maximum expense per case: 10.00
Limit to One Session:	<input type="radio"/> Yes <input checked="" type="radio"/> No			Priority for Supervisor Alert: 3 = Medium

4. Enter an Advisor ID into the field provided. The ID can be up to 10 characters in length. The Advisor ID must be unique (no duplicates), and must start with a letter.

It is recommended that the Newton CIA administrator create an Advisor profile first. It is then recommended that all managers and supervisors profiles be entered second.

Note: Advisors are assigned to a supervisor in Newton CIA. If there are no supervisors, the Newton CIA administrator can be the supervisor for all advisors.

5. Enter the advisor's First Name, Middle Initial and Last Name in the fields provided. Enter their name as they wish it to appear beneath the signature space on letters.
6. Enter the advisor's title (if any) into the field labeled "Title to print on Letters".
7. Enter the advisor's department (if any) into the field labeled "Department to print on Letters".

8. The closing to print on the advisor's letters defaults to "Sincerely Yours". If you prefer a different closing, please enter the information into the field labeled "Closing to print on Letters".
9. Enter the advisor's email address (if any) into the field labeled "Email Address".
10. The "Change Case Security Level" and the "Display Case Security Level". Security levels govern whether or not an advisor can access a case. They work this way: an advisor will not be able to access a case unless their security levels match or exceed the current security level of the case.

The system's default approach is to assign the advisor's security level to new cases. This can be overridden with Case Status codes (see Chapter 8).

We recommend you leave security levels at 0 until you have decided on your overall security approach in Newton CIA. However, the Security Administrator should have a security level of 9 for both changing and displaying records.

11. If you selected Password as mandatory in your Company Master profile, you will need to assign a password in the Advisor Password field. Enter that information into the field labeled "Password".

The minimum length of the password is defaulted to 4 in your Company Master profile. If you would like that to be more or less, you will need to change that information in the Company Master file.

The maximum length of the password is 10 characters. Passwords must start with a letter.

12. The "AS/400" values are only for use if your server is an AS/400.
13. The toggle boxes for "Limit to One Session", "Change Only Own Cases", and "Display Only Own Cases" allow you to put further restrictions on what the advisor can do. There are more such restrictions on the "Processing Defaults" tab. Enabling all of the security restrictions is not recommended. Rather, a carefully determined subset of the restrictions should meet your company's security needs, without limiting your advisors too much. The Priority For Supervisor Alert sets a threshold at which the advisor's supervisor is emailed when a case reaches that priority.

14. After completing this screen, click the tab labeled “Processing Defaults”. The screen should look like this:

Base User Profile Processing Defaults

Is the User a Supervisor?: Yes No

Supervisor's ID (if not a supervisor): SAM

Give user access to all companies?: Yes No

Specific Company Access (if ALL is N): DEMO

Change Only Same Supervisor Cases?: Yes No

Case Entry Access? (No = Display Only): Yes No

Configuration Maintenance Access?: Yes No

Administration Maintenance Access?: Yes No

Support Maintenance Access?: Yes No

Reports Access?: Yes No

Secondary Case Entry Access?: Yes No

Tracing Access?: Yes No

15. If the advisor is a supervisor, click Yes. If the advisor is not a supervisor, they will need to be assigned to a supervisor.
16. The field marked “Give User Access to All Companies” is defaulted to No. It is highly recommended that only the Newton CIA administrator or other necessary personnel be given access to all companies. If this field is No, then you must assign what company(ies) they may have access to.
17. It is recommended that the Newton CIA administrator be the only Advisor given access to the Configuration Maintenance, Administration Maintenance and Support Maintenance functions. Assign these functions to other advisors only on an as needed basis.
18. If the advisor will be generating reports from Newton CIA, click Yes in the field labeled “Reports Access”. If you are using Newton CIA in a networked environment, we recommend you control access to reporting closely, as some of the reports can impact network response time if used improperly.
19. The Secondary Case Entry Access toggle allows the advisor to use that feature. Since this can involve additional concurrent user licenses to your database, you may want to control it closely.
20. Tracing Access enables logging of Newton CIA program execution. This should only be set to Yes when you are directed to do so by a Newton Computing representative.

21. After you have completed entering the advisor's information, click the diskette icon listed on your toolbar to save the information.



You have successfully completed entering information into Advisor Maintenance. If you wish to create more advisor profiles, repeat the steps in this chapter.

Note: Changes to Newton CIA will only take effect once you completely exit out of the software.

Chapter 3

Fiscal Periods

In This Chapter We Will Cover:

- Adding Fiscal Periods to Fiscal Period Maintenance.

Fiscal periods are reporting periods, which can be calendar months (January 1 through January 31) or other combinations (January 15 through February 14). Some of the reports in Newton CIA require fiscal period definitions to run correctly. Please check with your accounting department to determine which reporting dates are used by your organization.

1. Click Config on the File Maintenance menu bar.
2. Select Fiscal Periods.

To add a Fiscal Period, select the “Add a record” icon located at the far upper left of the tool bar.



3. The Fiscal Period Screen should look like the following:

Fiscal Year:	Begin Date	End Date
Period 1:	00/00/0000	00/00/0000
2:	00/00/0000	00/00/0000
3:	00/00/0000	00/00/0000
4:	00/00/0000	00/00/0000
5:	00/00/0000	00/00/0000
6:	00/00/0000	00/00/0000
7:	00/00/0000	00/00/0000
8:	00/00/0000	00/00/0000
9:	00/00/0000	00/00/0000
10:	00/00/0000	00/00/0000
11:	00/00/0000	00/00/0000
12:	00/00/0000	00/00/0000

4. Enter the dates based upon your organization's accounting periods. If you defined your company as having 12 fiscal periods in Company Maintenance, the Set Calendar Periods button will appear. Use this button to automatically fill in normal calendar month start and end dates (fill in the Fiscal Year first).
5. After you have completed entering the Fiscal Period dates, click the diskette icon listed on your toolbar to save the information.



It is recommended that you add 3 years worth of data. The current year plus two additional years.

You have successfully completed entering Fiscal Periods. If you wish to create more, repeat the steps in this chapter.

Note: Changes to Newton CIA will only take effect once you completely exit out of the software.

Chapter 4

Location Maintenance

In This Chapter We Will Cover:

- Entering Locations into Location Maintenance.

Newton CIA's "Location Maintenance" allows you to enter manufacturing facilities (to tie product issues back to the manufacturing site) and sales/service locations (to track where customer contact occurred). You can also use it as a list of sales/service sites to be used by the Where to Buy/Locator function

1. Click Support on the File Maintenance menu bar.
2. Select Location File Maintenance.

To enter a Location into this file, select the "Add a record" icon located at the far upper left of the tool bar.



- The Location Screen should look like the following:

Code	Name	City/State/Zip Code	Status
ALL	All Locations		A
CTO42	Cycle Time Store 42	Covington GA 30014	A
CTO88	Cycle Time Store 88	San Antonio TX 78288	A

Code: Status: Active In-Active Deleted Country:

Description: Sales Region:

Address Line 1: Sales Territory:

Address Line 2: Agent:

City: State: Zip Code: + 4:

Phone Number: Extension:

Fax Number: Email:

Primary Contact: Secondary Contact:

Title: Title:

Locator Comments:

Alert Message:

Longitude: Full case required when location is selected? Yes No

Latitude: Appear in Locator/Where to Buy? Yes No

Is this Location Selectable? Yes No

- Enter a Location code into the space provided. The Location code can be up to 5 characters in length and must be unique.
- Enter a Location description into the space provided.
- Complete the rest of filing in the appropriate information in spaces provided.

Notes:

- The latitude and longitude values will be updated once you type in the city, state and zip code, and tab out of the zip code field. Be sure this is completed before saving.
- If you fill in the Alert Message field, the message will pop up when this location is selected in Case Entry.
- Appear in Locator/WTB controls whether this location can be retrieved when using the Locator.
- Is this Location Selectable should be set to No when you don't want this location to appear in Case Entry, or if this location is a hierarchy entry only (see Chapter 23).

After you have completed entering in the location, click the diskette icon listed on your toolbar to save the information.



You have successfully completed entering information into Location Maintenance. If you wish to enter additional locations, repeat the steps in this chapter.

Note: Changes to Newton CIA will only take effect once you completely exit out of the software.

Chapter 5

Issue Maintenance

In This Chapter We Will Cover:

- Adding Issues (Subjects) to Issue Maintenance.

Issues are the reasons why your customers are contacting your organization. These include, but may not be limited to, the following:

Product or Service Questions (How to use, care for, etc.)

Product or Service Complaints

Pricing Questions or Issues.

They are intended to be the detailed, often product specific, topics that customers will report to you. They are not meant to be general or “big picture” in scope, like the Reason for Contact codes created in Chapter 10.

1. Click Support on the File Maintenance menu bar.
2. Select Issue File Maintenance.

To add an Issue Code to the file, select the “Add a record” icon located at the far upper left of the tool bar.



3. The Issue Screen should look like the following:

<u>Code</u>	<u>Description</u>	<u>Status</u>
ALLDF	All Defects	A
DEFCT	Defective Workmanship	A
INQRY	Product Inquiry	A

Code:	<input type="text"/>	Status:	<input checked="" type="radio"/> Active	<input type="radio"/> In-Active	<input type="radio"/> Deleted
Description:	<input type="text"/>	Priority (Optional):	<input type="text"/>		
Alert Message:	<input type="text"/>				
Is Full Case required when this Issue is Selected?			Is the Issue Selectable ?		
<input type="radio"/> Yes <input checked="" type="radio"/> No			<input checked="" type="radio"/> Yes <input type="radio"/> No		

4. Enter an Issue Code in the space provided. The Issue Code can be 5 characters in length and must be unique.

Note: The alert message field is available if you want a message to pop up if this issue is selected when creating a record in Case Entry. An example of an Alert message might be that an issue needs further investigation.

The “Is The Issue Selectable?” toggle box is used for designating parent issues to be used in Issue Hierarchy Maintenance, which is covered in Chapter 21. Mark all normal issues as “Yes”.

The Priority field sets a priority level which will be applied to any case in which this product is selected. Leave blank to ignore this feature.

5. After you have completed entering an Issue Code; click the diskette icon listed on your toolbar to save the information.



You have successfully completed entering information into Issue Maintenance. If you wish to enter more Issues, repeat the steps in this chapter.

Note: Changes to Newton CIA will only take effect once you completely exit out of the software.

Chapter 6

Findings Maintenance

In This Chapter We Will Cover:

- Adding Findings to Findings Maintenance.

Findings are the results of an investigation or review your organization performs in evaluating a product or a service you provide to your customers. Some companies use the Issue code as the reported problem, with the Finding code as the actual or verified problem.

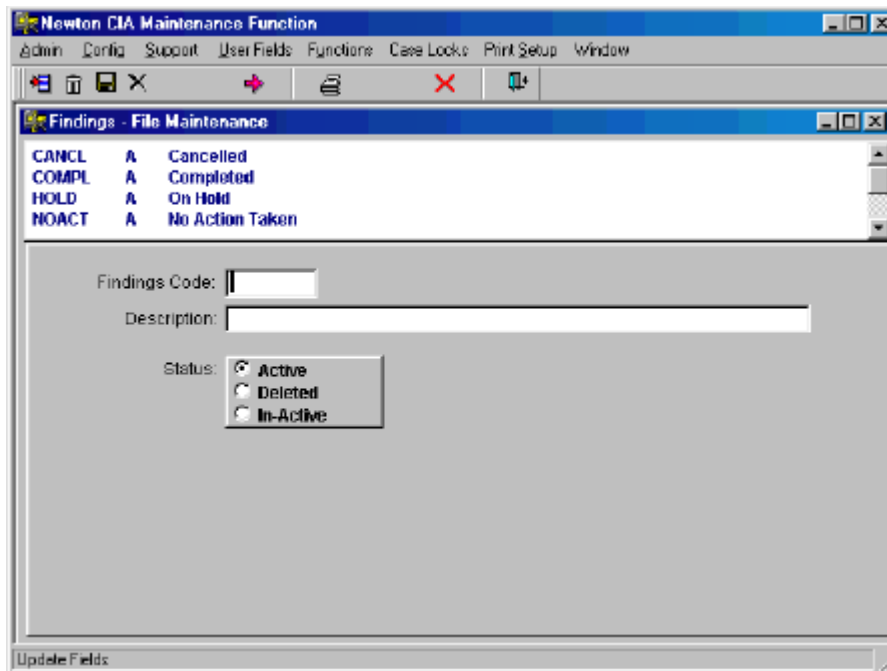
Example: You evaluate a product sent to you from a customer. The customer complains that the product has a faulty component. Your organization evaluates the product and either verifies the complaint, finds another cause for the complaint or finds nothing wrong with the product.

1. Click Config on the File Maintenance menu bar.
2. Select Findings File Maintenance.

To add a Finding Code to the file, select the “Add a record” icon located at the far upper left of the tool bar.



3. The Findings Screen should look like the following:



4. Enter a new Finding Code based upon possible outcomes after your organization performs an evaluation. The Finding Code can be 5 characters in length and must be unique.
5. After you have completed entering a Finding Code, click the diskette icon listed on your toolbar to save the information.



You have successfully completed entering information into Findings Maintenance. If you wish to enter more Findings, repeat the steps in this chapter.

Note: Changes to Newton CIA will only take effect once you completely exit out of the software.

Chapter 7

Product/Lot/Threshold File Maintenance

In This Chapter We Will Cover:

- Adding Products or Services to Product Maintenance.
- Adding Lot Number and Thresholds to Lot and Threshold Maintenance.

Products are the actual items or services that your company sells. Depending on your type of business, you may or may not wish to enter every product you carry. If you are a retailer, for example, you may wish to focus on the services you provide your customers (assistance finding products, store layout, checkout, returns, clarity of newspaper ads, etc.), rather than listing every individual item on your shelves. You might find it sufficient to enter only the manufacturers of the various products you sell. If you are a manufacturer, however, it is likely that you should enter every item you make. This will also make it possible for you to use Newton CIA's lot number tracking features (described in this Chapter), if you manufacture in production or process lots. In any case, setup of your products requires some thought, since it will determine whether Newton CIA provides you value beyond simple customer contact support.

In this Chapter we will explain how to enter Products into Newton CIA.

1. Click Support on the File Maintenance menu bar.
2. Select Product File Maintenance.

To add a Product Code to the file, select the "Add a record" icon located at the far upper left of the tool bar.



3. The Product Screen should look like the following:

Product Code	Description	Item Number	Status
ABC	Voyager VMX Bike	N260	A
ALL BIKES	All Bikes		A
BMX	BMX Bike	B200	A

Product Code:

Description:

Status: Active In-Active Deleted Priority (Optional):

Item Number: UPC Code:

MFG Code:

Alert Message:

Is a Full Case required for this Product? Case Required Case Not Required

Is this Product Selectable? Yes No

(Note: Lot Numbers may ONLY be entered in Change Mode.)

4. Enter a new Product Code in the space provided. The Product Code can be up to 25 characters in length and must be unique.
5. If your products have Item Numbers, UPC Codes and Manufacturing (SKU) Codes, enter them in the spaces provided.

The Priority field sets a priority level which will be applied to any case in which this product is selected. Leave blank to ignore this feature.

The “Is This Product Selectable?” toggle box is for designating Product hierarchy parent records, which is explained in Chapter 20. Mark normal Products as “Yes”.

Note: The alert message field is available if you want a message to pop up when this product is selected in Case Entry. An example of an Alert message might be that a product will be discontinued.

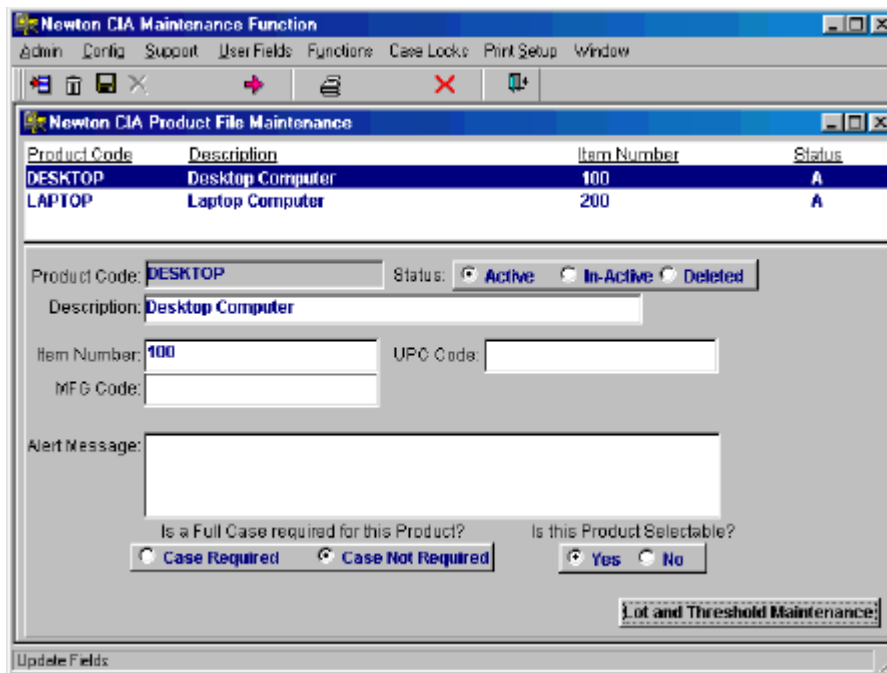
6. After you have completed entering a Product Code, click the diskette icon listed on your toolbar to save the information.



Lot Number Maintenance

Once you have entered a product into Product Maintenance , you can enter lot number and threshold reporting information for that product.

1. In Product Maintenance, double click on a product to which you want to add lot numbers. The following screen will appear.



2. Click the button in the lower right hand corner of the screen labeled "Lot and Threshold Maintenance".
3. To add a Lot Number to the file, select the "Add a record" icon located at the far upper left of the tool bar.



The following screen will appear.

Lot/Threshold Select
256437
823465

Lot Number:

Date Manufactured: 08/11/2000

Manufactured Quantity:

Manufactured At:

Unit Cost:

Lot Status: Active In-Active Deleted

Lot Number Level Thresholds - Finding

Notification Amount: or Percent:

Action Amount: or Percent:

Lot Number Level Thresholds - Issue

Notification Amount: or Percent:

Action Amount: or Percent:

4. Enter the Lot Number and its date of manufacture into the space provided.
5. Enter the manufactured quantity for this particular lot number in the space labeled "Manufactured Quantity".
6. Select the manufacturing location in the space labeled "Manufactured at". These values are drawn from your Location file, so you must have entered them first.
7. Now enter your lot level thresholds. These are used by the Threshold reports to determine if a lot has had too many complaints reported against it. The first box sets these for Finding codes, the second for issue codes. This can be used to track thresholds against actual (finding) vs. reported (issue) complaints, if you wish to set Newton CIA up this way. You can also use one or the other, or not use Threshold reporting at all. (If your company doesn't assign lot numbers to your products, or if your offerings are services, then threshold reporting is of no value to you.)
In each box, you can set two threshold levels. "Notification" level is to call attention to this lot number, but doesn't constitute an emergency. "Action" level is meant to alert you that its time to intervene with a product problem. You don't have to use both, if you don't wish to. If you don't set any values for an alert level, then it won't be used.
Each alert level is entered as either an "Amount" (a numeric value) or a "Percentage", and will be triggered in the Threshold Reports when a lot number meets or exceeds that level of complaints. Set an Amount as a specific number of complaints required to trigger the threshold. Enter a

Percentage as a decimal value (example: enter 10% as 0.10), and it will be presented in percentage format when you TAB out of the field.

Note: Don't set both an Amount and a Percentage. Just set one or the other.

Once you're done setting the values for Finding Thresholds, set them in the Issue Thresholds box, if you wish to.

Example: You enter a manufactured quantity of 100 units for a particular lot. You set a Notification level threshold as a Percentage at 5% (enter 0.05). You receive 5 complaints against that lot number. You will receive a notification regarding that lot in the Threshold Report. You would get the same result if you had set an Amount of 5, instead of a percentage. This notification is a flag that something may be wrong with this particular lot.

8. After you have completed entering Lot and Threshold information, click the diskette icon listed on your toolbar to save the information.



You have successfully completed entering information into Product and Lot Maintenance. If you wish to enter more Products or lots, repeat the steps in this chapter.

Note: Changes to Newton CIA will only take effect once you completely exit out of the software.

Finding and Issue Threshold Maintenance

Once you have entered a lot number into Lot Number Maintenance , you can enter finding and/or issue threshold reporting information for that lot number. This will allow you to run the more precise Finding and Issue level Threshold Reports. These reports track thresholds for individual finding and/or issue codes against a lot, rather than for all such codes.

1. In Lot Number Maintenance , double click on a lot number to which you want to add finding or issue thresholds. The following screen will appear.

Newton CIA Lot Maintenance - ABC

Exit Functions Printer Setup

Lot/Threshold Select
256437
823465

Lot Number: 256437
Date Manufactured: 08/02/2000
Manufactured Quantity: 20
Manufactured At: [dropdown]
Unit Cost: \$300.00
Lot Status: Active In-Active Deleted

Lot Number Level Thresholds - Finding
Notification Amount: [input] or Percent: [input]
Action Amount: [input] or Percent: [input]

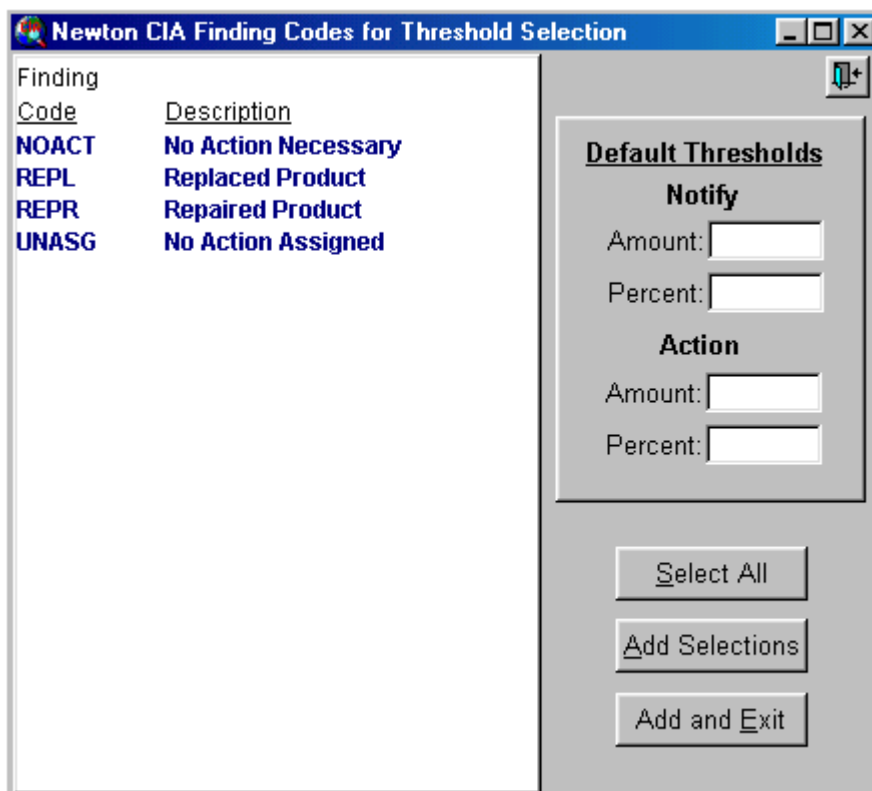
Lot Number Level Thresholds - Issue
Notification Amount: [input] or Percent: [input]
Action Amount: [input] or Percent: [input]

Finding Level Thresholds Issue Level Thresholds

2. Click the button on the bottom of the screen for either “Finding Level Thresholds”, or “Issue Level Thresholds”, depending on which you want. Since both processes work and appear nearly alike, we will only do an example of Finding level threshold addition.
3. To add a finding code threshold to the file, select the “Add a record” icon located at the far upper left of the tool bar.



The following screen will appear.



4. First, you’ll need to select the finding code(s) you want to set thresholds for. There are several ways to do this.

If you only need a single finding code, just click on the code you want in the selection area on the left half of the window.

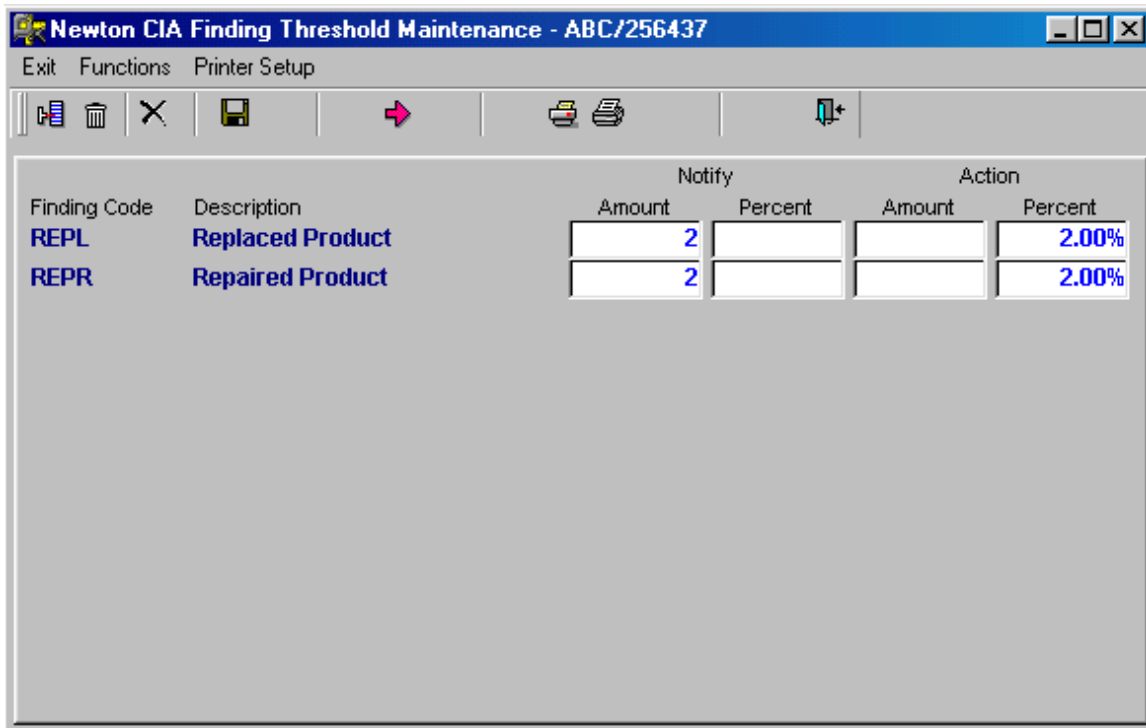
If you’d like to select several codes individually, hold down the CTRL key, and then click on the other codes you want. Then let the CTRL key go.

If you want several codes that are together in the list, click on the first one you

want, then press and hold the SHIFT key, and finally click on the last of the codes you want. The two codes you clicked on, and all those in between, will be selected. Don't forget to release the SHIFT key when you're done.

If you want to select all of the codes, just click the "Select All" button in the lower right hand portion of the window.

5. Once you've selected the finding codes for which you want to add thresholds, you'll need to set the thresholds themselves in the "Default Thresholds" box. Set these values in the same manner as was explained in the previous section about lot level thresholds. Just keep in mind that you are checking for occurrences of only one code, rather than all of them (in other words, the Amounts or Percents will be much smaller). The values you set here will be entered for all of the finding codes you selected in step 4. You'll have a chance to customize them later.
6. Now you're ready to add the threshold entries. If you want to add entries for the codes and thresholds you've set up so far, but you want to stay in this window and do more, click the "Add Selections" button. If you want to add the entries and automatically close this window, click the "Add and Exit" button.
7. Once you've returned to the Finding Thresholds window, it will look like this:



On this window, you can change the individual Amounts and Percents for each finding code.

8. After you have completed entering Finding thresholds, click the diskette icon listed on your toolbar to save the information.



You have successfully completed entering information into Finding Threshold Maintenance. If you wish to enter more thresholds, repeat the steps in this chapter.

Note: Changes to Newton CIA will only take effect once you completely exit out of the software.

Chapter 8

Case Status Codes

In This Chapter We Will Cover:

- Adding Status Codes to Case Status Codes Maintenance.

Case Status can be described as a progression that each case follows from beginning to end. Cases begin in an Open status and will remain open until someone changes the status and processes the record.

You can have as few as 2 (I.e. Opened, Closed), or as many as your business needs require. You can even delete the status codes provided when you first create a company with your own codes. Just be sure to go back to Company Maintenance and replace the default New and Closed status codes. One restriction does exist. The value "Q" is reserved for Quick Case, and cannot be accessed in Case Status Code Maintenance.

A security level can be assigned to a status code. This will override the system's default approach, which is to assign the advisor's security level to new cases. Security levels work this way: an advisor will not be able to access a case unless their security levels match or exceed the current security level of the case.

Example: You assign a security level of 0 for open records and a 6 to closed records. A record is placed into a closed status and the record processed. Advisors with a security level of 5 or less will not be able to access closed records.

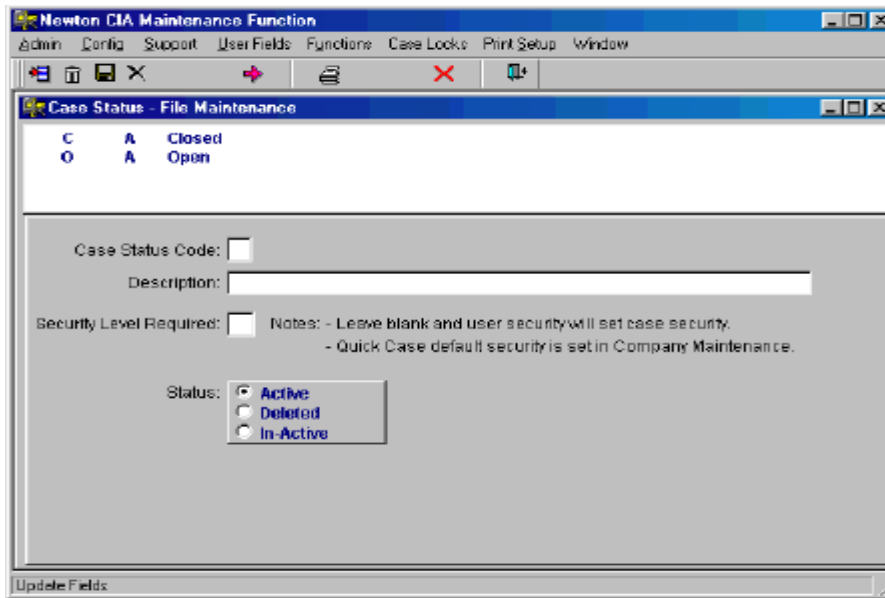
Note: A memo can be added to a closed record if the advisor's Display Case Security level matches or exceeds a closed record security level. This security level can be updated in the Advisor Maintenance File.

1. Click Config on the File Maintenance menu bar.
2. Select Case Status Codes.

To add a Status Code, select the “Add a record” icon located at the far upper left of the tool bar.



3. The Case Status Screen should look like the following:



4. Enter a Case Status Code in the field provided. Case Status Codes can only be 1 character in length. The Case Status Code must be unique.
5. Type in a description in the field provided.
6. If you chose to use a security level for a status, enter the level in the field provided. Security levels are from 0 to 9.
7. After you have completed entering the Case Status information, click the diskette icon listed on your toolbar to save the information.



You have successfully completed entering Case Status Codes. If you wish to create more, repeat the steps in this chapter.

Note: Changes to Newton CIA will only take effect once you completely exit out of the software.

Chapter 9

Method Maintenance

In This Chapter We Will Cover:

- Adding Methods of Customer Contact to Method Maintenance.

Methods are the ways that your customers chose to get in touch with your organization. They could include but may not be limited to the following:

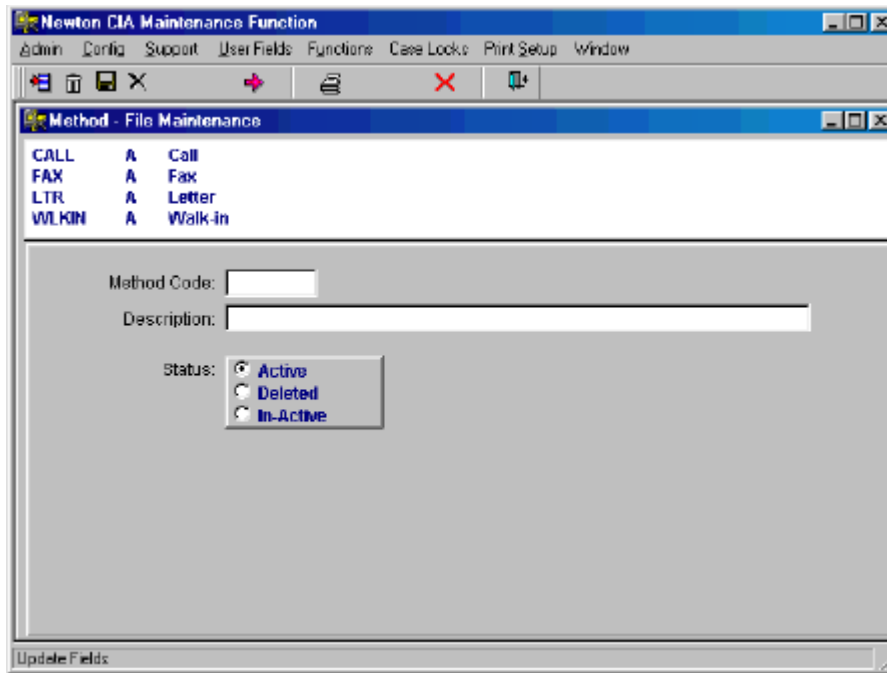
Telephone, Letter, Email

1. Click Config on the File Maintenance menu bar.
2. Select Method File Maintenance.

To add a Method Code to the file, select the “Add a record” icon located at the far upper left of the tool bar.



3. The Method of Contact Screen should look like the following:



4. Enter a new Method based upon ways that your customers will contact you. The Method Code can be 5 characters in length and must be unique.
5. After you have completed entering a Method, click the diskette icon listed on your toolbar to save the information.



You have successfully completed entering information into Method Maintenance. If you wish to enter more Methods, repeat the steps in this chapter.

Note: Changes to Newton CIA will only take effect once you completely exit out of the software.

Chapter 10

Reason For Contact Maintenance

In This Chapter We Will Cover:

- Adding Reasons to Reason for Contact Maintenance.

Reasons are the overall “why” your customers chose to get in touch with your organization. They should not be detailed or specific; such descriptions will be handled by Issue codes. They could include but may not be limited to the following:

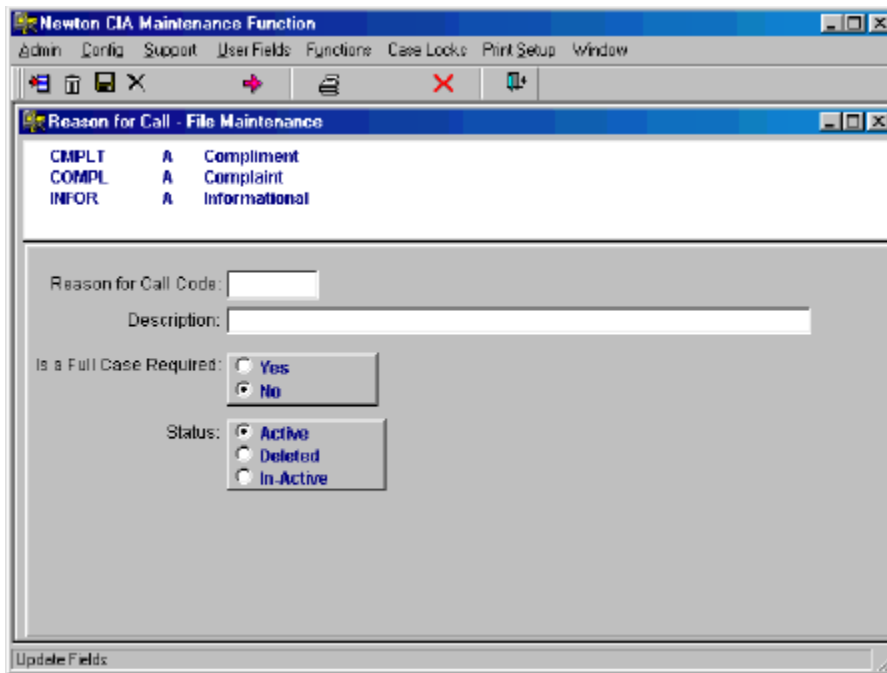
Inquiries, Compliments, and Complaints.

1. Click Config on the File Maintenance menu bar.
2. Select Reason for Call File Maintenance.

To add a Reason Code to the file, select the “Add a record” icon located at the far upper left of the tool bar.



3. The Reason for Call Screen should look like the following:



4. Enter a new Reason Code based upon reasons why your customer's will contact you. The Reason for Call Code can be 5 characters in length and must be unique.
5. After you have completed entering a Reason Code, click the diskette icon listed on your toolbar to save the information.



You have successfully completed entering information into Reason for Contact Maintenance. If you wish to enter more Reasons, repeat the steps in this chapter.

Note: Changes to Newton CIA will only take effect once you completely exit out of the software.

Chapter 11

Customer Type Maintenance

In This Chapter We Will Cover:

- Entering information into Customer Type Maintenance.

Newton CIA's "Customer Type Maintenance" allows you to classify individuals contacted in a case by Customer type. Examples of Customer types are:

Consumers, Retailers, Distributors or Vendors.

1. Click Config. on the File Maintenance menu bar.
2. Select Customer Type File Maintenance.

To enter information into either file, select the "Add a record" icon located at the far upper left of the tool bar.



The screen will look like this:

3. Enter a Customer Type Code into the space provided. The code can be up to 5 characters in length and must be unique.

Code	Status	Description
CUS	A	Customer
DLR	A	Dealer
REG	A	Regulatory Official
RPR	A	Repair Shop

Customer Type Code:

Description:

Status: Active
 Deleted
 In-Active

4. Fill in a description.

After you have completed entering in the information, click the diskette icon listed on your toolbar to save the information.



You have successfully completed entering information into Customer Type Maintenance . If you wish to enter additional Customer Types, repeat the steps in this chapter.

Note: Changes to Newton CIA will only take effect once you completely exit out of the software.

Chapter 12

Enclosures Maintenance

In This Chapter We Will Cover:

- Entering Enclosures in Enclosure Maintenance.

Enclosures are fulfillment items that your organization wishes to send to your customers. These could included but are not limited to the following:

Coupons

Brochures

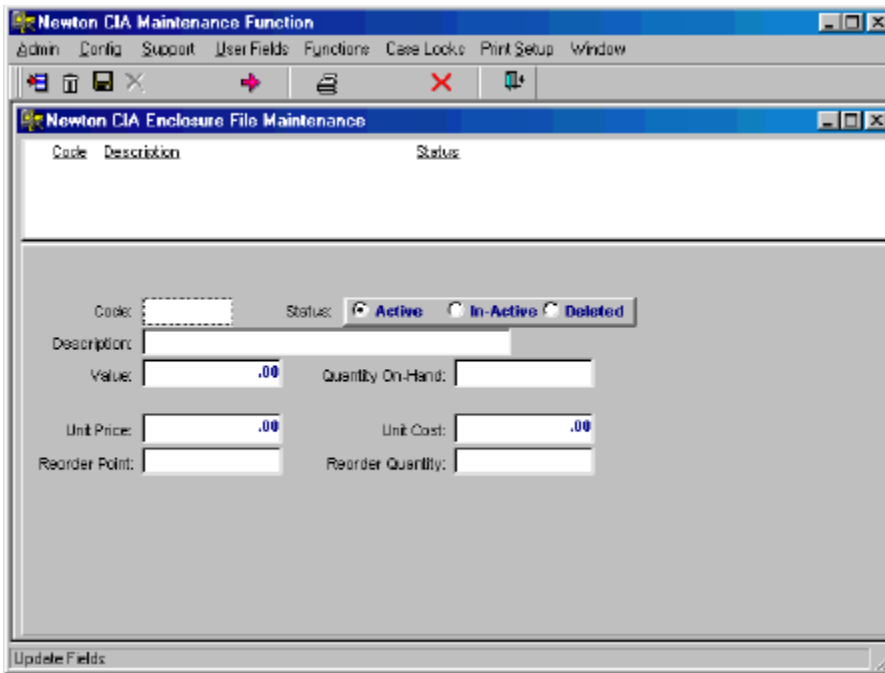
Prepaid Envelopes

1. Click Support on the File Maintenance menu bar.
2. Select Enclosures File Maintenance.

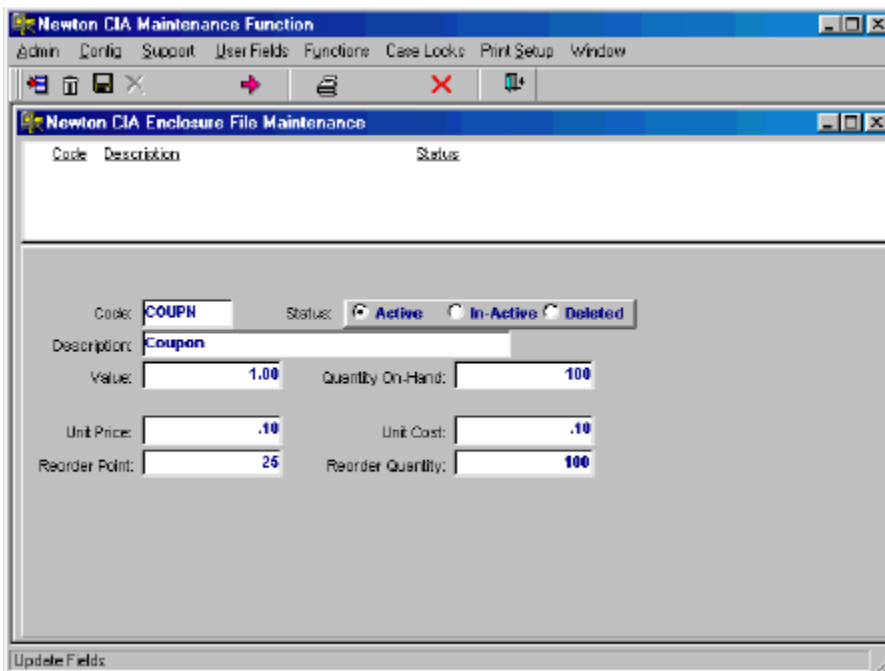
To add an Enclosure Code to the file, select the “Add a record” icon located at the far upper left of the tool bar.



3. The Enclosure Screen should look like the following:



4. Enter an Enclosure Code in the space provided. The Enclosure Code can be up to 5 characters in length and must be unique.



The cost data is not essential to the function of Newton CIA, although the “Value” field will be used for totaling the amount spent on enclosures in a case.

After you have completed entering an Enclosure Code, click the diskette icon



listed on your toolbar to save the information.

You have successfully completed entering information into Enclosure Maintenance. If you wish to enter more enclosures, repeat the steps in this chapter.

Note: Changes to Newton CIA will only take effect once you completely exit out of the software.

Chapter 13

Enclosure Group Maintenance

In This Chapter We Will Cover:

- Creating Enclosure Groups in Enclosure Group Maintenance.

Enclosure Groups are groups of enclosures that your organization wishes to send to your customers. You associate these enclosures with each other in order to save time in Case Entry. An advisor can select an enclosure group in a single operation, rather than selecting each of the enclosure items individually.

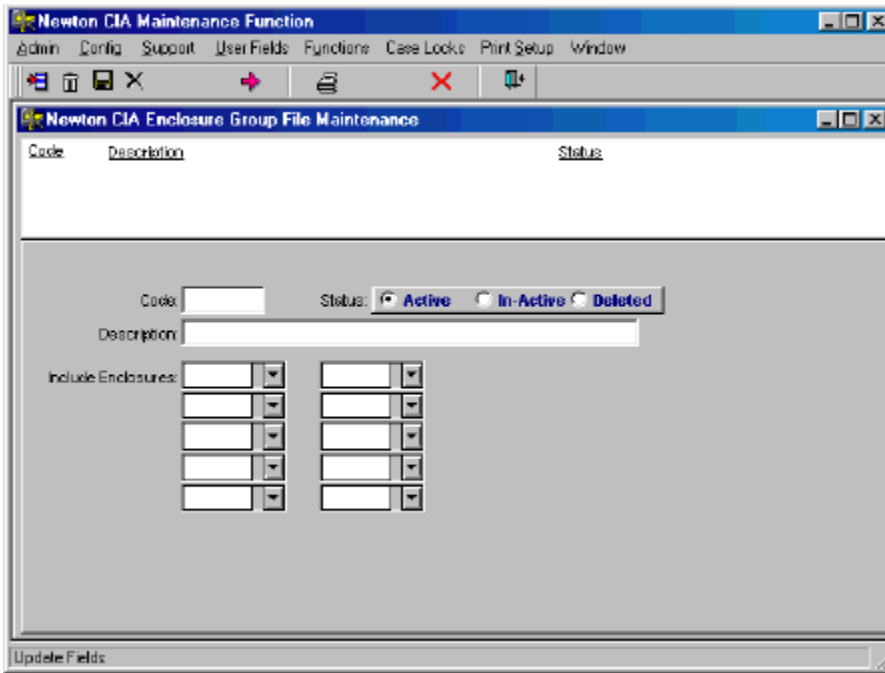
Example: Your organization wishes to send out a brochure and a coupon, and send it in a company envelope. An enclosure group allows you to select all three with a single mouse click.

1. Click Support on the File Maintenance menu bar.
2. Select Enclosure Group File Maintenance.

To add an Enclosure Group Code to the file, select the “Add a record” icon located at the far upper left of the tool bar.

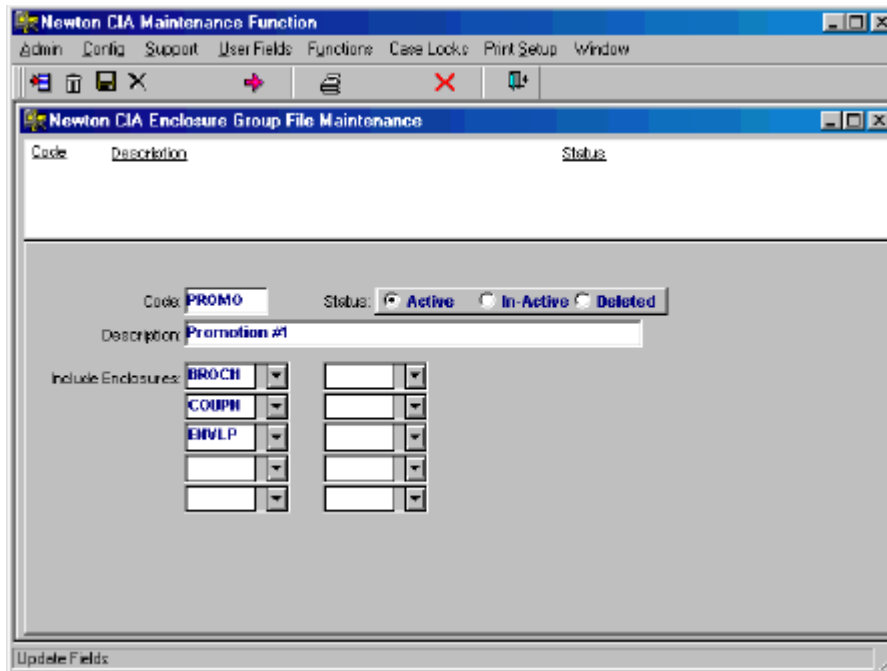


- The Enclosure Group Screen should look like the following:



- Enter an Enclosure Group Code in the space provided. The Enclosure Group Code can be up to 5 characters in length and must be unique.

Below is an example of a Response Group.



After you have completed entering a Enclosure Group, click the diskette icon listed on your toolbar to save the information.



You have successfully completed entering information into Enclosure Group Maintenance. If you wish to enter more Enclosure Groups, repeat the steps in this chapter.

Note: Changes to Newton CIA will only take effect once you completely exit out of the software.

Chapter 14

Letter Paragraph Maintenance

In This Chapter We Will Cover:

- Creating paragraphs for your letters in Letter Paragraph Maintenance.

Newton CIA lets you create and use standard paragraphs in multiple letters. This creates efficiencies for your advisors and allows your organization the ability to create “canned” written responses to be printed on your letterhead.

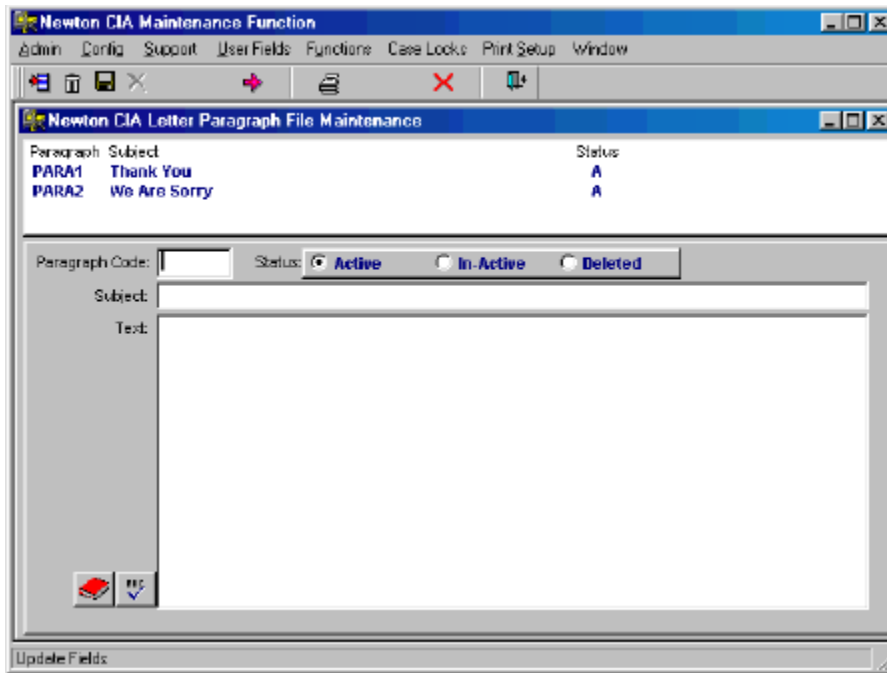
Your advisors can send written responses without having to generate letters from scratch, while still having the option to customize responses when needed.

1. Click Support on the File Maintenance menu bar.
2. Select Letter Paragraph File Maintenance.

To create paragraphs in this file, select the “Add a record” icon located at the far upper left of the tool bar.



3. The Letter Paragraph Screen should look like the following:



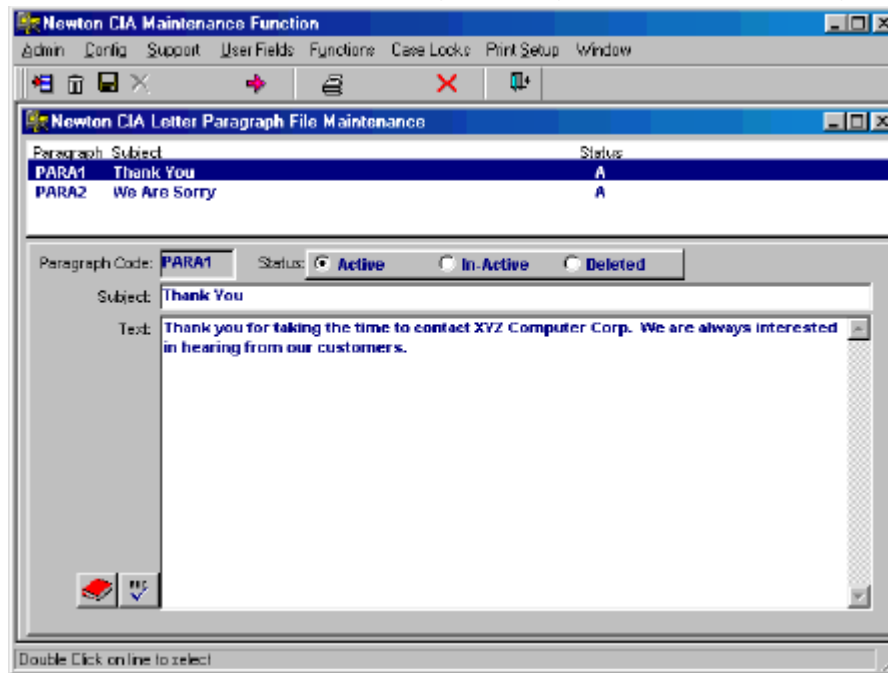
4. Enter a Letter Paragraph Code in the space provided. The Letter Paragraph Code can be up to 5 characters in length and must be unique.

5. Give your paragraph a description or summary in the space provided.

6. Type in the text of your paragraph in the space provided. Before processing, spell check the text of your paragraph. The spell check button is located at the lower left of the text box indicated by the following



Below is an example of creating a paragraph in Letter Paragraph Maintenance.



To allow for some automatic customization of letters, Newton CIA lets you insert information from a case into a letter. Special codes allow you to bring in a variety of values from the current case. Letter Paragraph Maintenance has a help feature that lists the insert codes and the data they will obtain for your letter. Click the red book button in the lower left of the window to get the display.



Code	Description
&&(X)	Console Insert (prompt)
&&CA	Insert Address Line 1
&&CB	Insert Address Line 2
&&CC	Insert Company Name
&&CD	Insert City
&&CE	Insert State
&&CF	Insert First Name
&&CG	Insert Zip Code
&&CH	Insert Zip Code Plus 4
&&CI	Insert Middle Initial
&&CL	Insert Last Name
&&CN	Insert Full Name
&&CS	Insert Salutation
&&CZ	Insert Case Number
&&DB	Insert Date mmmmmmm dd, yyyy
&&DE	Insert Date dd mmmmmmmm, yy
&&DF	Insert Date mm.dd.yy
&&DR	Insert Date mm/dd/yy
&&PN	Insert Product Description
&&SN	Insert Issue Description
&&UC	Insert Representative Closing
&&UD	Insert Representative Dept.
&&UN	Insert Representative Title
&&US	Insert Representative Name

All you do to use the inserts is type the code into a sentence where you want to use it. For example, “If you need to call us, please reference case number &&CZ.”, will place the case number directly into the sentence.

All but one of the inserts work in this fashion. The exception is called a Console Insert. This code allows you to prompt the advisor creating the letter to type in some custom value. As an example, “We take your problem very seriously, and will have our &&(Title of manager or supervisor) call you personally”. This insert will prompt the advisor with the text “Title of manager or supervisor”, so they know to type in the appropriate value.

After you have completed entering the Letter Paragraph Code and the text for your paragraph, click the diskette icon listed on your toolbar to save the information.



Note: You do not have to create the salutation or the closing in Newton CIA. These are automatically inserted into each new letter.

You have successfully completed entering information into Letter Paragraph Maintenance. If you wish to enter more paragraphs, repeat the steps in this chapter.

Note: Changes to Newton CIA will only take effect once you completely exit out of the software.

Chapter 15

Letter Content Maintenance

In This Chapter We Will Cover:

- Grouping paragraphs to create letters in Letter Content Maintenance.

Newton CIA lets you group the paragraphs that you created in Letter Paragraph Maintenance into letters. Paragraphs can be used in multiple letters. This creates efficiencies for your advisors and allows your organization the ability to create “canned” written responses to be printed on your letterhead.

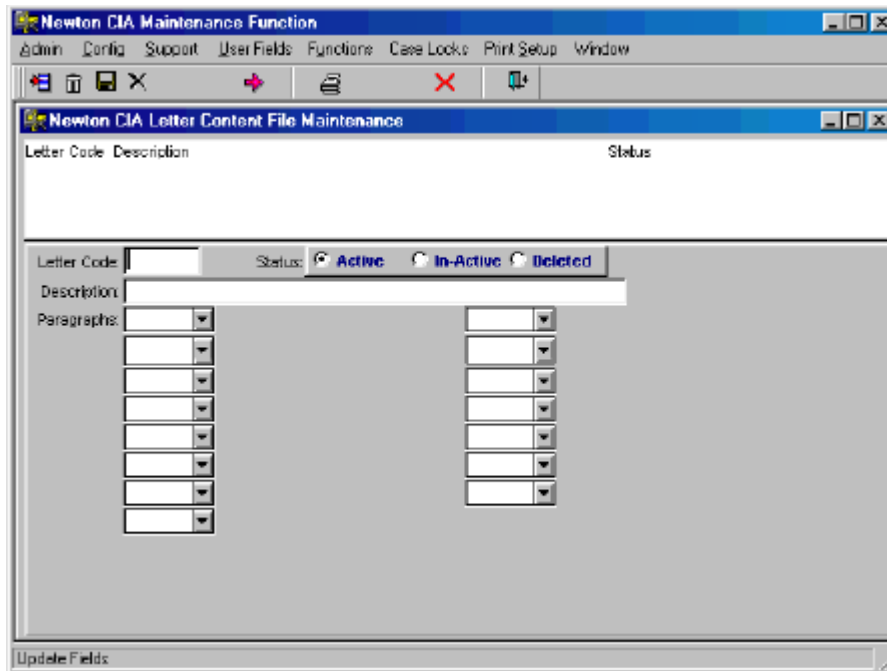
Your organization can send written responses without having to generate responses from scratch, while still having the option to customize responses when needed.

1. Click Support on the File Maintenance menu bar.
2. Select Letter Content File Maintenance

To group paragraphs in this file, select the “Add a record” icon located at the far upper left of the tool bar.

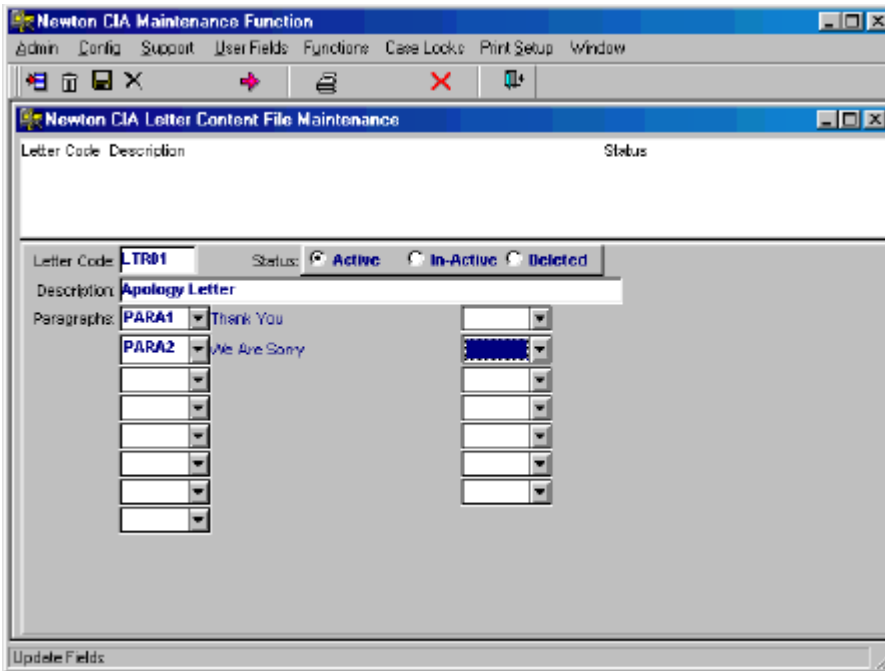


3. The Letter Content Screen should look like the following:



4. Enter a Letter Content Code in the space provided. The Letter Content Code can be 5 characters in length and must be unique.
5. Give your letter a description in the space provided.
6. Using the drop down lists, select the paragraph(s) you want in the letter.

Below is an example of creating a letter in the Letter Content File Maintenance.



After you have completed selecting the Letter Code and the paragraphs you want in your letter, click the diskette icon listed on your toolbar to save the information.



Note: The Letter Paragraph Maintenance paragraphs must be completed prior to assigning them to letters in this section.

You have successfully completed entering information into Letter Content Maintenance. If you wish to enter more letters, repeat the steps in this chapter.

Note: Changes to Newton CIA will only take effect once you completely exit out of the software.

Chapter 16

Reference Center Maintenance

In This Chapter We Will Cover:

- Entering information into Reference Center Maintenance.

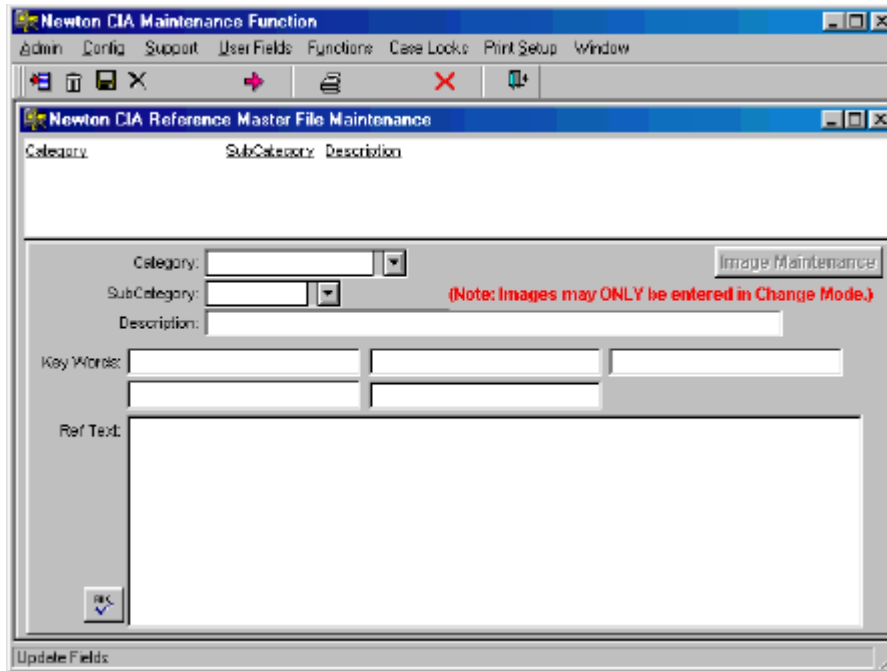
Newton CIA's "Reference Center" function allows you to provide images and scripted answers on various topics to your advisors, which they can use as responses when customers contact your organization about an issue. The Reference Center can be used as an "on-line" reference manual or as a training tool for new advisors, as well as for other purposes.

1. Click Support on the File Maintenance menu bar.
2. Select RefCenter Master.

To enter a reference item into this file, select the "Add a record" icon located at the far upper left of the tool bar.



3. The Reference Center Screen should look like the following:



Reference items are identified and organized according to a Category and a Subcategory. You can call the categories and subcategories whatever you want, depending on your company's needs. In most instances, you will key them in directly.

The drop down lists exist for a special alternative. You can define a reference item in terms of a product and an issue that you have already defined in the appropriate file maintenance windows. Reference items defined in this manner are available for automatic lookup from Case Entry, when the product and issue in question are the ones displayed on the Product/Issue tab. The advisor needs only to click on the Reference Center button, and the Reference Center will display with this reference item loaded.

4. Type in a description in the space provided

5. Type in Key Words in the space(s) provided. Keywords are a tool to help advisers find Reference Items they need. The Reference Center has a keyword lookup feature that allows advisers to enter a single word that should be associated with the information they want. So when you set up a reference item, be sure to include at least two or three keywords, if not the full five.

6. Type in the text that you would like your advisers to see in the space labeled "Ref. Text".

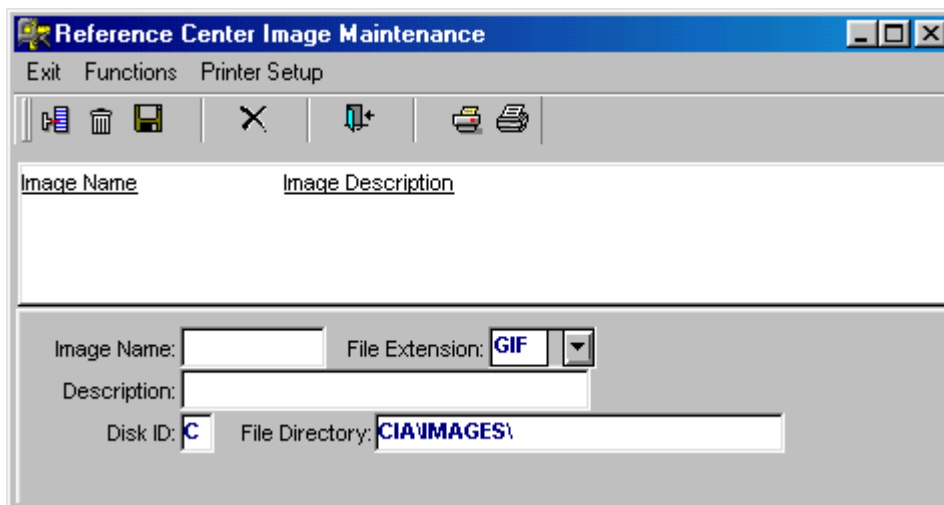
7. Before processing your information, run the spell check. The spell check button is located towards the left of the Reference Center Text box. The spell check button looks like the following:



After you have completed entering in the reference information, click the diskette icon listed on your toolbar to save the information.



Once you have completed a reference item, you may want to associate some online images with it. To do this, retrieve the reference item you just saved, and click on the “Image Maintenance” button in the upper right corner of the work area. This will bring up the Reference Image Maintenance” window. Click on the “Add a Record” button to setup the work area.



For each image you want to associate with the reference item, fill in the data fields and save the record (with the diskette button).

Image names are limited to 8 characters, and can't start with a number. The disk ID and file directory default to values appropriate for a single user Newton CIA installation. If you have a multi user and/or networked installation, you'll probably need to set custom values. Also, if you will have multiple companies defined in Newton CIA, we recommend you establish a folder for each company within the IMAGES folder.

You have successfully completed entering information into the Reference Center Master. If you wish to enter more information, repeat the steps in this chapter.

Note: Changes to Newton CIA will only take effect once you completely exit out of the software.

Chapter 17

Survey Maintenance

In This Chapter We Will Cover:

- Entering survey questions into Survey Maintenance.

Newton CIA's "Survey Maintenance File" allows you to create your own inbound and outbound surveys. The survey responses can be either multiple choice or free form scripts.

1. Click Support on the File Maintenance menu bar.
2. Select Survey File Maintenance.

To enter a Survey into this file, select the "Add a record" icon located at the far upper left of the tool bar.



3. The Survey Screen should look like the following:

Newton CIA Survey File Maintenance

Master Code: Question Number:

Description: Is the Question Multiple Choice?

Question Title:

Question Text:

Multiple Choice Options:

<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

4. Enter a code into the field labeled "Master Code". The code can be up to 5 characters in length. It will be shared by all the questions in the survey.
5. Assign a question number reflecting the order in which you want this question presented.
6. Enter a description, which should be the same for each question in the survey. Then fill in the question title and question text in the spaces provided.
7. If the survey is multiple choice, click in the "Is The Question Multiple Choice?" check box, and then fill in the responses for as many (up to 10) options as you want.
8. If the question requires a free form answer, skip #7.
9. Before processing your information, run the spell check. The spell check button is located to the left of the Question Text box. The spell check button looks like the following:



After you have completed entering in the survey information, click the diskette icon listed on your toolbar to save the information.



You have successfully completed entering a question into Survey Master Maintenance. If you wish to enter additional questions, repeat the steps in this chapter.

Note: Changes to Newton CIA will only take effect once you completely exit out of the software.

Chapter 18

Warranty Claim Status and Disposition Maintenance

In This Chapter We Will Cover:

- Entering information into Warranty Claim Status and Disposition Maintenance.

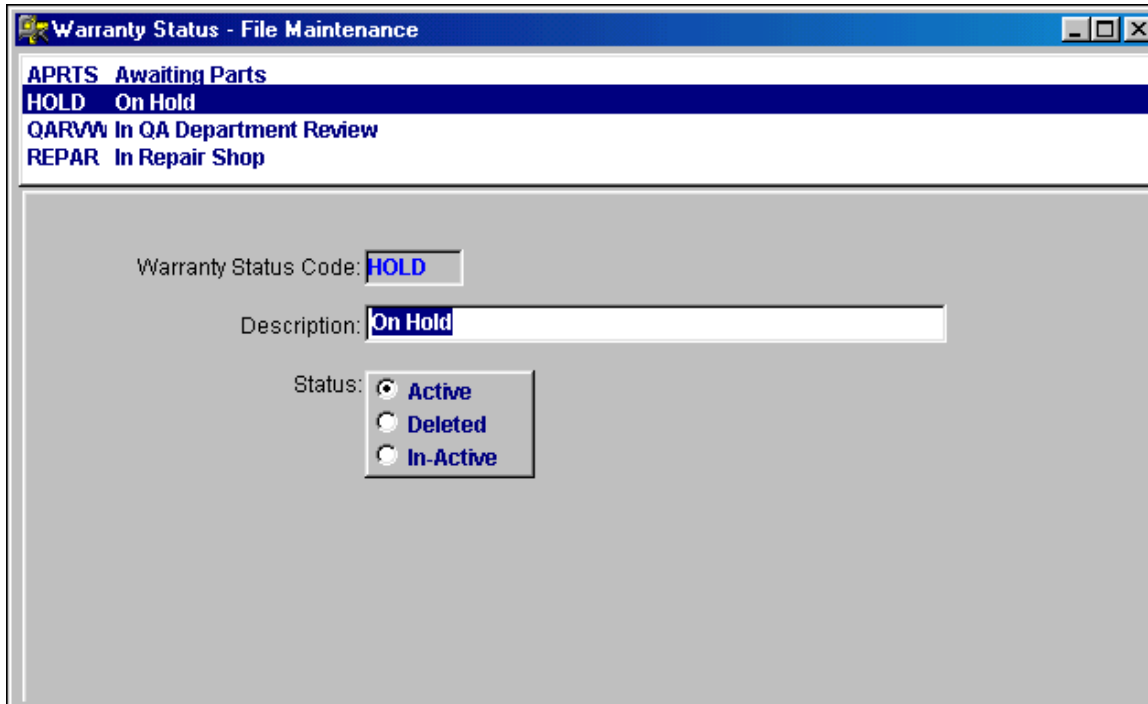
Newton CIA's Warranty Tab allows you to track situations where the customer is sufficiently displeased to initiate a warranty claim. Warranty Claim Status codes are used to show where the claim is in the claim handling process. Warranty Claim Disposition codes are used to indicate what action has been taken to satisfy the claim.

1. Click Config. on the File Maintenance menu bar.
2. Select either the Warranty Claims Status or Disposition File Maintenance.

To enter information into either file, select the "Add a record" icon located at the far upper left of the tool bar.



The screen will look like this, with the code description appropriate to the type of code you're entering:



3. Enter a Warranty Claim Status Code or a Warranty Claim Disposition Code into the space provided. The codes can be up to 5 characters in length and must be unique.
4. Add a description in the space provided.

After you have completed entering in the code, click the diskette icon listed on your toolbar to save the information.



You have successfully completed entering information into Warranty Claim Status and/or Disposition Maintenance. If you wish to enter additional codes, repeat the steps in this chapter.

Note: Changes to Newton CIA will only take effect once you completely exit out of the software.

Chapter 19

Agent Maintenance

In This Chapter We Will Cover:

- Entering information into Agent Maintenance.

Newton CIA's "Agent Maintenance" allows you to define agents (either individuals or job titles, both within your company or outside), to whom you may need to forward information about cases or other topics. The Notice feature in Case Entry is the primary place where agents codes are used.

1. Click Support on the File Maintenance menu bar.
2. Select Agent File Maintenance.



- To enter an agent, select the “Add a record” icon located at the far upper left of the tool bar. The screen will look like the example below:

The screenshot shows a window titled "Newton CIA Agent File Maintenance". At the top, there is a table with three columns: Code, Description, and Status. The table contains three rows of data:

Code	Description	Status
AGNT	Acme Bike Corp	A
AGNT1	Pauls Bike Shop	A
AGNT3	Johns Fixit Shop	A

Below the table is a form for adding a new agent. The form includes the following fields and controls:

- Code: [Text input field]
- Status: Active In-Active Deleted
- Country: USA (dropdown menu)
- Name: [Text input field]
- Address: [Text input field]
- [Text input field]
- State: [Text input field] Zip Code: [Text input field] + 4: [Text input field]
- Primary Contact: [Text input field]
- Phone Number: [Text input field] Extension: [Text input field]
- E-Mail ID: [Text input field]
- Secondary Contact: [Text input field]
- Phone Number: [Text input field] Extension: [Text input field]
- Fax Phone Number: [Text input field]
- Alert: [Text area]
- Specialities: [Text input field]
- [Text input field]
- [Text input field]

- Enter an Agent Code into the spaces provided. The Agent code can be up to 5 characters in length and must be unique.
- Complete the rest of the information in the space(s) provided. The “Alert” field allows you to define a message that will pop up when an advisor selects this agent.

After you have completed entering in the information, click the diskette icon listed on your toolbar to save the information.



You have successfully completed entering information into Agent Maintenance. If you wish to enter additional Agents into the file, repeat the steps in this chapter.

Note: Changes to Newton CIA will only take effect once you completely exit out of the software.

Chapter 20

Product Hierarchy Maintenance

In This Chapter We Will Cover:

- Setting up Product Hierarchies in Product Hierarchy Maintenance.

Product Hierarchies are simple ways to group similar (say, same design but different color) or associated products (different products sold by the same division) into categories for reporting purposes. Several of the reports in Newton CIA provide subtotals based on hierarchies, giving you an instant look at how whole divisions or product lines may be doing.

Think of hierarchies like a management structure. Several employees report to each supervisor, several supervisors to each manager and several managers to the vice president. A reporting hierarchy would give you appropriate totals for each layer of management.

Example: Company XYZ sells the following products:

Product Code: Desktop (Desktop Computer)

Product Code: Inkjet (Inkjet Printer)

Products Code: Laptop (Laptop Computer)

In a report without product hierarchies, the products will list in the following order:

Desktop, Inkjet, Laptop.

With a product hierarchy, you develop a product category (i.e. Computers) as the parent and then list Desktop and Laptop as Components of the parent.

When you run your report, Computers will be shown as a line item at the bottom, totaling the Desktop and Laptop numbers.

You are not required to use this function, it is strictly for reporting convenience.

Product records must be input in Product File Maintenance prior to using this function. The Product hierarchy parents (Computers, in the example above) must also be entered in Product File Maintenance, with the “Is This Product Selectable?” toggle box being set to “No” (See Chapter 7). Once this work is done, then you can associate Products with Product parents in a hierarchy.

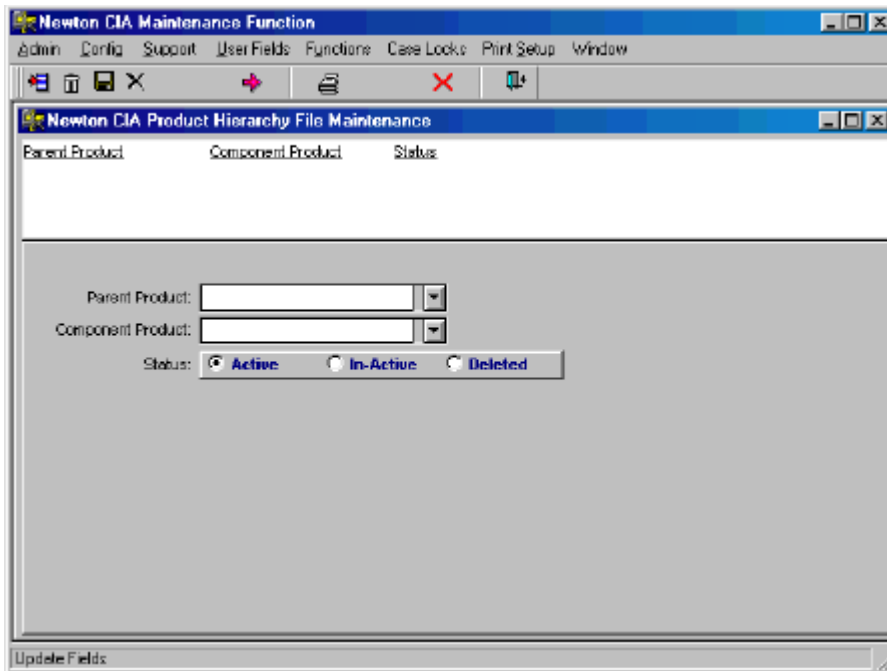
Product Hierarchy Maintenance

Once you have entered all Product Parents into the Product Maintenance File, you can proceed to establish Parent/Component relationships in the Product Hierarchy Maintenance File.

1. Click Support on the File Maintenance menu bar.
2. Select Product Hierarchies File Maintenance.
3. To create a Parent/Component relationship in the file, select the “Add a record” icon located at the far upper left of the tool bar



The screen should look like the following.



Parent Product	Component Product	Status
----------------	-------------------	--------

Parent Product:

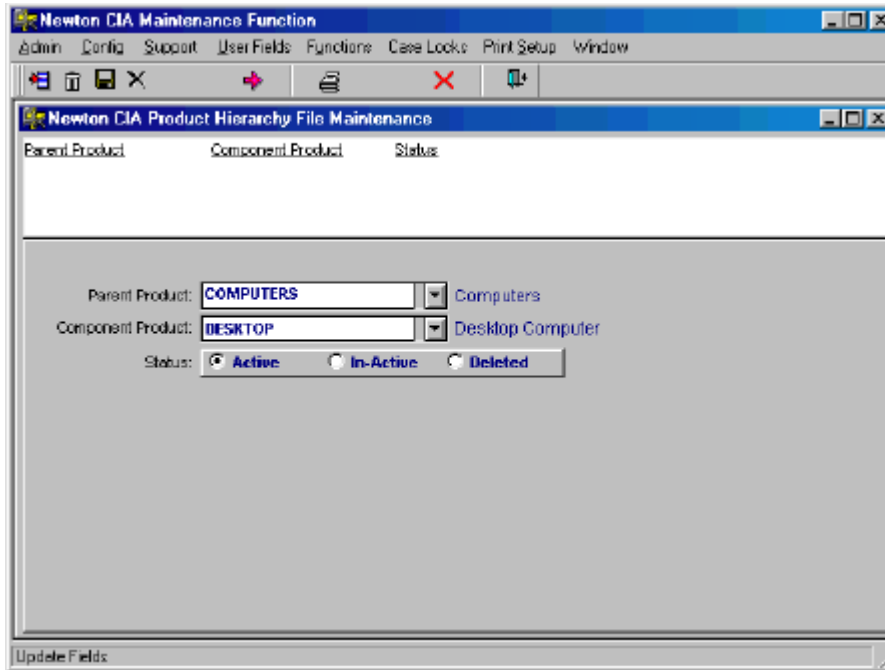
Component Product:

Status: Active In-Active Deleted

Update Fields

4. Create your first Parent/Component Relationship by typing in the parent and component product values, or by using the drop down lists with each field.

The following illustration is a Parent/Component for company XYZ.



5. After you have completed entering a Parent/Component relationship, click the diskette icon listed on your toolbar to save the information.



You have successfully completed entering information into Product Hierarchy Maintenance. If you wish to create more relationships, repeat the steps in this chapter.

Note: Changes to Newton CIA will only take effect once you completely exit out of the software.

Chapter 21

Issue Hierarchy Maintenance

In This Chapter We Will Cover:

- Setting up Issue Hierarchies in Issue Hierarchy Maintenance.

Issue (Subject) Hierarchies are simple ways to group similar (say, problems with employee conduct towards customers, from rudeness to lying) or associated issues (all finish related problems, whether with paint or surface preparation) into categories for reporting purposes. Several of the reports in Newton CIA provide subtotals based on hierarchies, giving you an instant look at the impact of related types of problems.

Think of hierarchies like a management structure. Several employees report to each supervisor, several supervisors to each manager and several managers to the vice president. A reporting hierarchy would give you appropriate totals for each layer of management.

Example: Company XYZ wants to track the following issues:

Issue Code: Colors (Colors are streaking?)

Issue Code: Cost1 (Price is too high)

Issue Code: Cost2 (Why is the price changing so often?)

In Issue Hierarchy Maintenance, you create an issue category (i.e. Price Inquiries) as the Parent, and then list Cost1 and Cost2 as Components of the parent.

When you run your report, Price Inquiries will be shown as a line item at the bottom, totaling the Cost1 and Cost2 numbers.

You are not required to use this function, it is strictly for reporting convenience.

Issue records must be input in Issue File Maintenance prior to using this function.

The Issue hierarchy parents (Price Inquiries, in the example above) must also be entered in Issue File Maintenance, with the “Is The Issue Selectable?” toggle box being set to “No” (See Chapter 5). Once this work is done, then you can associate Issues with Issue parents in a hierarchy.

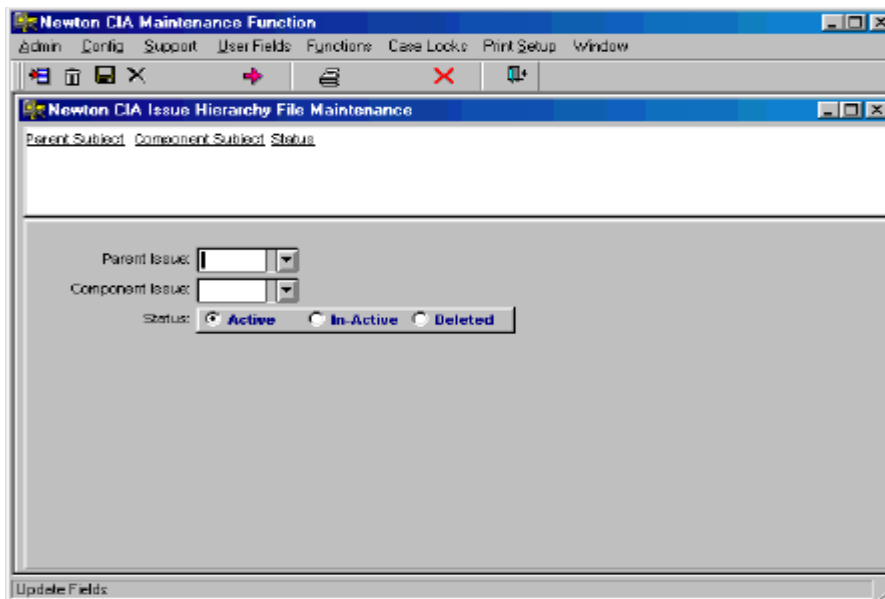
Issue Hierarchy Maintenance

Once you have entered all Issue Parents into the Issue Maintenance File, you can proceed to establish Parent/Component relationships in the Issue Hierarchy Maintenance File.

1. Click Support on the File Maintenance menu bar
2. Select Issue Hierarchies File Maintenance
3. To create a Parent/Component relationship in the file, select the “Add a record” icon located at the far upper left of the tool bar

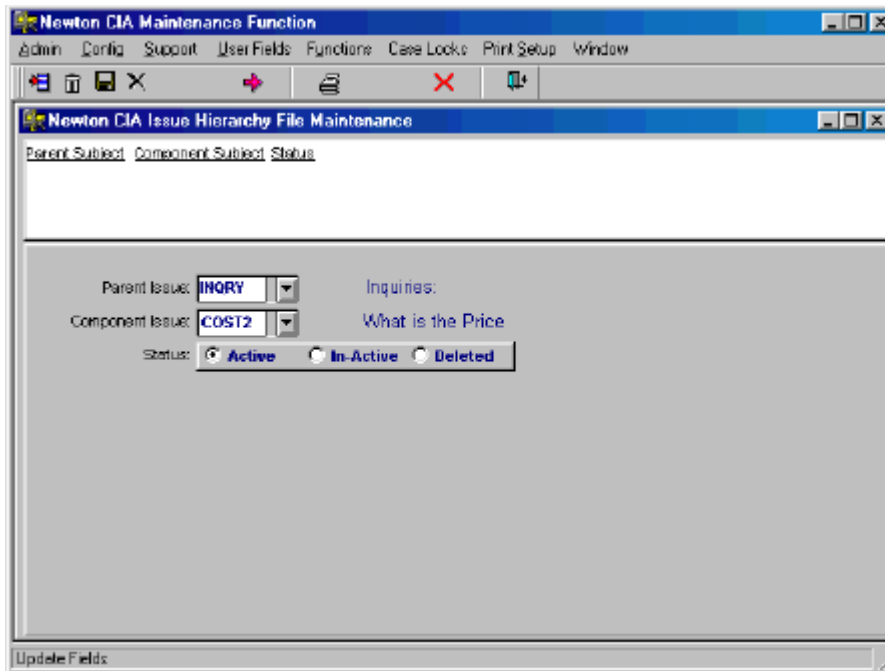


The screen should look like the following.



4. Create your first Parent/Component Relationship by typing in the parent and component issue values, or by using the drop down lists with each field.

The following illustration is a Parent/Component for company XYZ.



5. After you have completed entering a Parent/Component relationship, click the diskette icon listed on your toolbar to save the information.



You have successfully completed entering information into Issue Hierarchy Maintenance. If you wish to create more relationships, repeat the steps in this chapter.

Note: Changes to Newton CIA will only take effect once you completely exit out of the software.

Chapter 22

Advisor Hierarchy Maintenance

In This Chapter We Will Cover:

- Setting up Advisor Hierarchies in Advisor Hierarchy Maintenance.

Advisor (User) Hierarchies are simple ways to group associated Advisors (all Advisors in the same department, or reporting to the same supervisor) into categories for reporting purposes. Several of the reports in Newton CIA provide subtotals based on hierarchies, giving you an instant look at the impact of groups of Advisors.

Think of hierarchies like a management structure. Several employees report to each supervisor, several supervisors to each manager and several managers to the vice president. A reporting hierarchy would give you appropriate totals for each layer of management.

Example: Company XYZ has the following Advisors:

Advisor: Bill (reports to Jane)

Advisor: Anne (reports to Tim)

Advisor: Tom (reports to Tim)

Advisor: Tim (supervisor)

In Advisor Hierarchy Maintenance, you use an Advisor (i.e. Tim) as the Parent, and then list Anne and Tom as Components of the parent.

When you run your report, Tim will be shown as a line item at the bottom, totaling the Anne, Tom and Tim numbers.

You are not required to use this function, it is strictly for reporting convenience.

Advisor records must be input in Advisor Maintenance prior to using this function.

Advisor Hierarchy Maintenance

Once you have entered all Advisor Parents into Advisor Maintenance , you can proceed to establish Parent/Component relationships in Advisor Hierarchy Maintenance.

Click Aadmin on the File Maintenance menu bar.

1. Select Advisor Hierarchies File Maintenance.
2. To create a Parent/Component relationship in the file, select the “Add a record” icon located at the far upper left of the tool bar



The screen should look like the following.

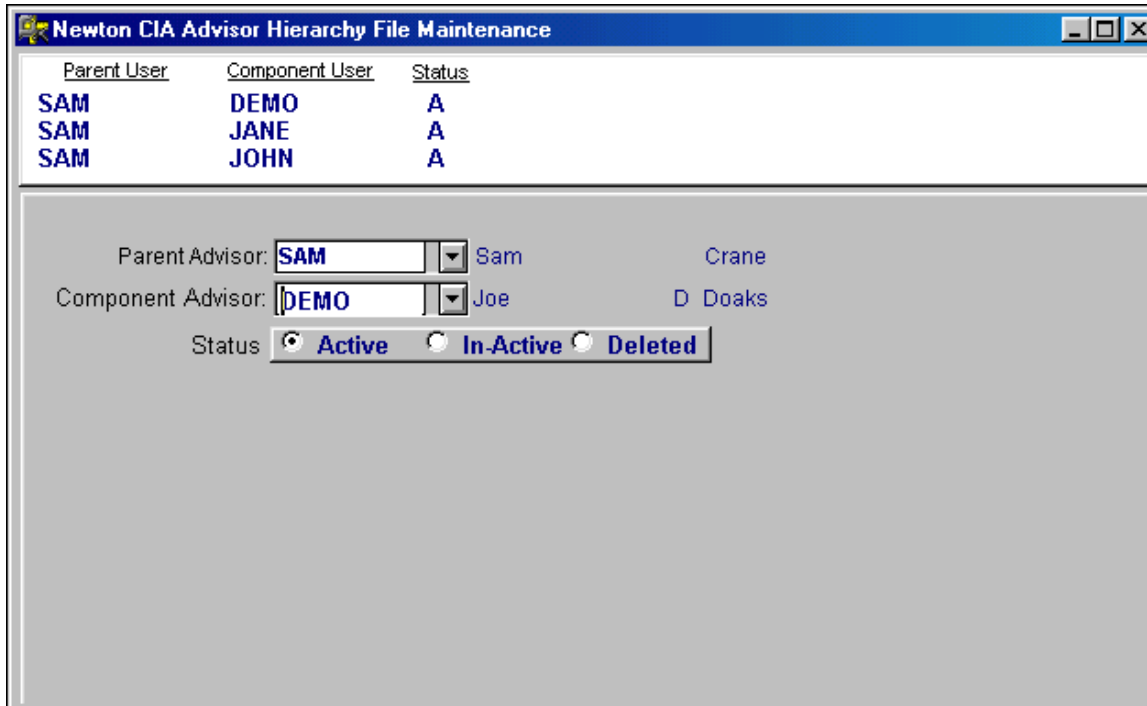
The screenshot shows a window titled "Newton CIA Advisor Hierarchy File Maintenance". It contains a table with three columns: "Parent User", "Component User", and "Status". The table lists three entries: SAM (parent) and DEMO (component), SAM (parent) and JANE (component), and SAM (parent) and JOHN (component), all with a status of "A". Below the table are two dropdown menus for "Parent Advisor" and "Component Advisor", and a status selection area with radio buttons for "Active", "In-Active", and "Deleted".

Parent User	Component User	Status
SAM	DEMO	A
SAM	JANE	A
SAM	JOHN	A

Parent Advisor:
Component Advisor:
Status: Active In-Active Deleted

3. Create your first Parent/Component Relationship by typing in the parent and component issue values, or by using the drop down lists with each field.

4.
The following is an illustration.



5. After you have completed entering a Parent/Component relationship, click the diskette icon listed on your toolbar to save the information.



You have successfully completed entering information into Advisor Hierarchy Maintenance. If you wish to create more relationships, repeat the steps in this chapter.

Note: Changes to Newton CIA will only take effect once you completely exit out of the software.

Chapter 23

Location Hierarchy Maintenance

In This Chapter We Will Cover:

- Setting up Location Hierarchies in Location Hierarchy Maintenance.

Location Hierarchies are simple ways to group similar (say, stores in the same chain) or associated Locations (all repair facilities in the same state or region) into categories for reporting purposes. Several of the reports in Newton CIA provide subtotals based on hierarchies, giving you an instant look at the impact of groups of locations.

Think of hierarchies like a management structure. Several employees report to each supervisor, several supervisors to each manager and several managers to the vice president. A reporting hierarchy would give you appropriate totals for each layer of management.

Example: Company XYZ has several locations:

Location: PHL (Philadelphia)

Location: NYC (New York)

Location: ATL (Atlanta)

In Location Hierarchy Maintenance, you assign a Location category (i.e. Northeast) as the Parent, and then list PHL and NYC as Components of the parent.

When you run your report, Northeast will be shown as a line item at the bottom, totaling the PHL and NYC numbers.

You are not required to use this function, it is strictly for reporting convenience.

Location records must be input in Location Maintenance prior to using this function. The Location hierarchy parents (Northeast, in the example above) must

also be entered in Location File Maintenance, with the “Is The Issue Selectable?” toggle box being set to “No” (See Chapter 4). Once this work is done, then you can associate Locations with Location parents in a hierarchy.

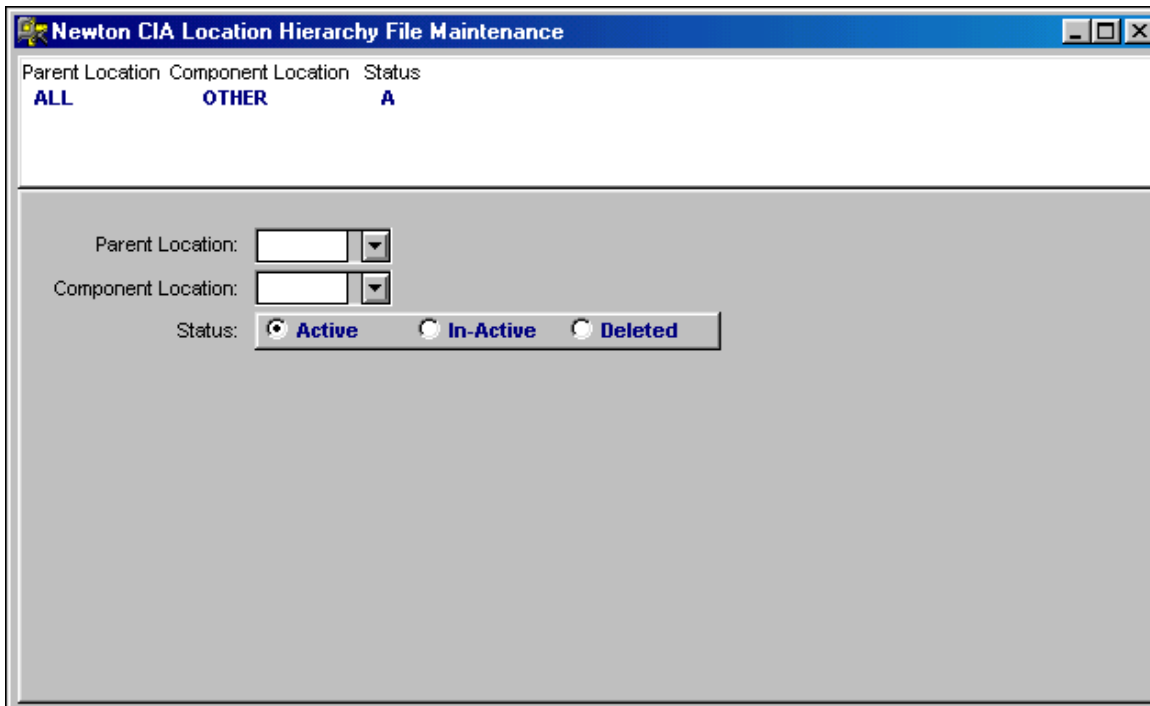
Location Hierarchy Maintenance

Once you have entered all Location Parents into Location Maintenance , you can proceed to establish Parent/Component relationships in Location Hierarchy Maintenance.

1. Click Support on the File Maintenance menu bar.
2. Select Location Hierarchies File Maintenance
3. To create a Parent/Component relationship in the file, select the “Add a record” icon located at the far upper left of the tool bar



The screen should look like the following.



Parent Location	Component Location	Status
ALL	OTHER	A

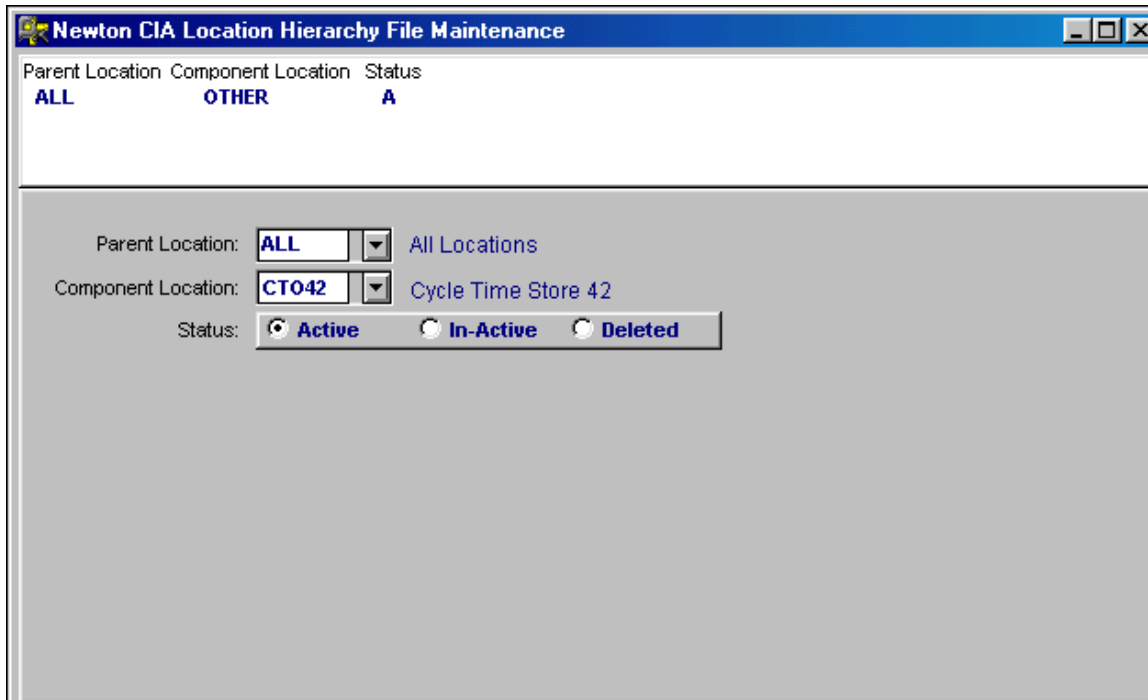
Parent Location:

Component Location:

Status: Active In-Active Deleted

4. Create your first Parent/Component Relationship by typing in the parent and component issue values, or by using the drop down lists with each field.

5. The following illustration is a Parent/Component for company XYZ.



6. After you have completed entering a Parent/Component relationship, click the diskette icon listed on your toolbar to save the information.



You have successfully completed entering information into Location Hierarchy Maintenance. If you wish to create more relationships, repeat the steps in this chapter.

Note: Changes to Newton CIA will only take effect once you completely exit out of the software.

Chapter 24

User Fields

In This Chapter We Will Cover:

- Entering information into User Defined Field Maintenance.

Newton CIA allows an organization to define their own information gathering fields called User Fields. These fields allow you to track information that is not predefined in Newton CIA. You must first define these fields in the Screen Defaults (2) section of Company Master Maintenance.

1. Click Aadmin on the File Maintenance menu bar.
2. Select Company Master.
3. Double click the company you want to work on.
4. Click the Screen Defaults 2 tab. The following screen will appear:

Name and Address	Processing Defaults	Tab Defaults	Screen Defaults (1)	Screen Defaults (2)
User Defined Field (1):	<input type="text"/>		Is Quick Case Zip Code Mandatory ?	<input type="radio"/> Yes <input checked="" type="radio"/> No
User Defined Field (2):	<input type="text"/>		Is Quick Case Issue Mandatory ?	<input type="radio"/> Yes <input checked="" type="radio"/> No
User Defined Field (3):	<input type="text"/>		Is Quick Case Product Mandatory ?	<input type="radio"/> Yes <input checked="" type="radio"/> No
User Defined Field (4):	<input type="text"/>		Is Quick Case Verbatim Mandatory ?	<input type="radio"/> Yes <input checked="" type="radio"/> No
User Defined Field (5):	<input type="text"/>		Is Quick Case Location Mandatory ?	<input type="radio"/> Yes <input checked="" type="radio"/> No
User Defined Field (6):	<input type="text"/>			
User Defined Field (7):	<input type="text"/>			
User Defined Field (8):	<input type="text"/>			

5. Enter your User Defined Field(s) beginning with User Defined Field (1). If you have additional User Defined Fields, continue with space (2), and so on.

After you have completed entering in the information, click the diskette icon listed on your toolbar to save the information.



Exit the Company Master and return to the main File Maintenance screen.

6. Click User Fields, and select whichever of the fields you want to maintain codes for.



To enter information into your User Defined Field, select the “Add a record” icon located at the far upper left of the tool bar.

The screen will look something like the following example:

<u>Code</u>	<u>Description</u>	<u>Status</u>
NEW	New Customer	A
REPEAT	Repeat Customer	A

Code: Status: Active In-Active Deleted

Description:

7. Enter your User Defined Code into the spaces provided. The User Defined Code can be 25 characters in length and must be unique.
8. Add a description of the code.

After you have completed entering in the information, click the diskette icon listed on your toolbar to save the information.



You have successfully completed entering information into User Defined Field Maintenance. If you wish to enter additional information, repeat the steps in this chapter.

Note: Changes to Newton CIA will only take effect once you completely exit out of the software.

Chapter 25

News Maintenance

In This Chapter We Will Cover:

- Posting bulletins in News Maintenance.

Newton CIA's "News Maintenance" allows an organization the ability to post news bulletins (announcements) for Newton CIA Advisors. They are viewed in the News tab of the Notification Center. Examples of when you may wish to post a news bulletin are:

Meeting announcements, new product introductions or promotional announcements.

1. Click Aadmin. on the File Maintenance menu bar.
2. Select News Maintenance.

To enter information into the file, select the "Add a record" icon located at the far upper left of the tool bar.



3. Type in the "Display from Date" and the "Display to Date" into the appropriate fields. The News Item will only display between these dates.
4. Tab from the "Display to Date" field into the text field or click your mouse anywhere in the text field. Begin typing the message or bulletin in the space provided.
5. Prior to saving the message, you may spell check the information for accuracy. To spell check your text, click the Spell Check icon located at the bottom left hand corner of the text box.



After you have completed entering and spell checking the information, click the diskette icon listed on your toolbar to save the information.



You have successfully completed entering information into News Maintenance . If you wish to enter additional bulletins or messages, repeat the steps in this chapter.

Note: Changes to Newton CIA will only take effect once you completely exit out of the software.

Chapter 26

Canadian Province Maintenance

In This Chapter We Will Cover:

- Adding Canadian Provinces.

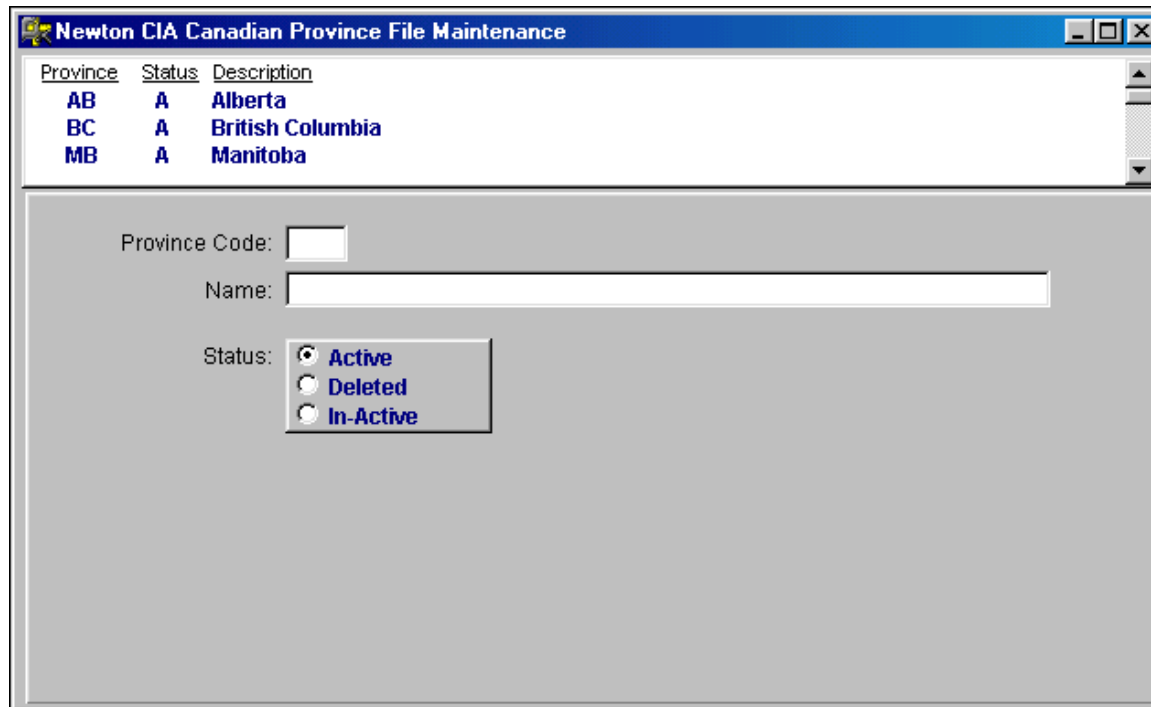
In Case Entry, click File Maint. at the top of the screen.

1. Click Admin on the File Maintenance menu bar.
2. Select Canadian Province Maintenance.

To add a Province to the file, select the “Add a record” icon located at the far upper left of the tool bar.



3. The Province entry screen should look like the following:



4. Enter a new province based upon the province code and name determined by the Canadian government.
5. After you have completed entering a province, click the diskette icon listed on your toolbar to save the information.



You have successfully completed entering information into Canadian Province Maintenance. If you wish to enter more provinces, repeat the steps in this chapter.

Note: Changes to Newton CIA will only take effect once you completely exit out of the software.

Chapter 27

U.S. State Maintenance

In This Chapter We Will Cover:

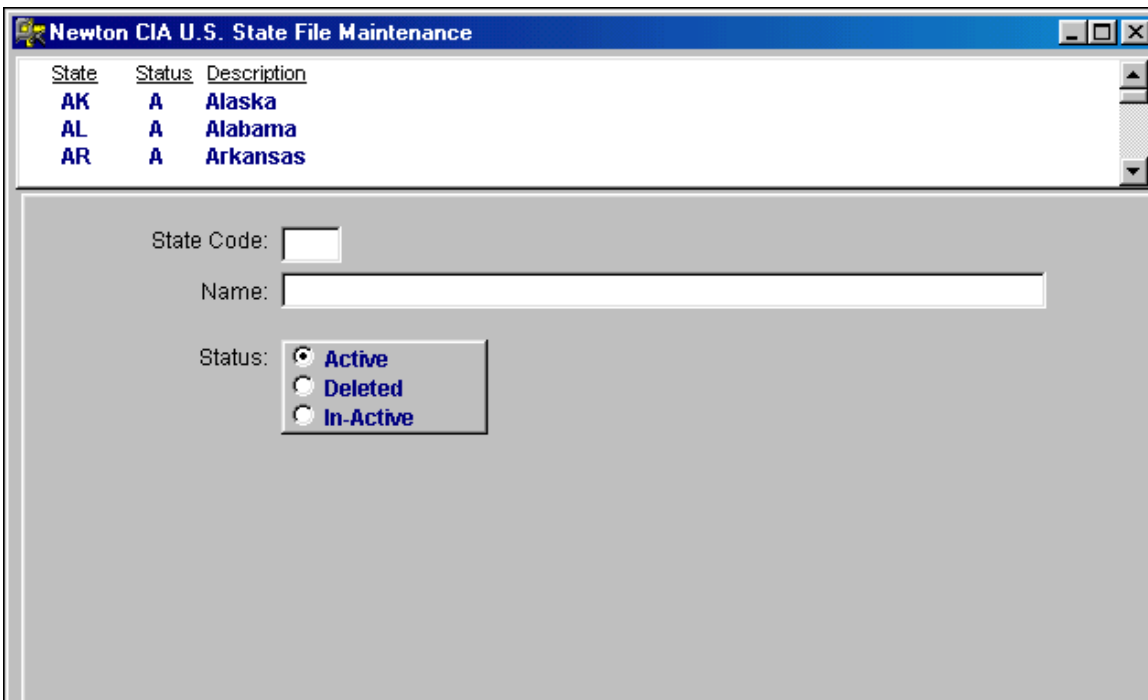
- Adding U.S. State and Zip Codes.

1. Click Aadmin on the File Maintenance menu bar.
2. Select U.S. State Maintenance. The following screen will appear.

To add a State to the file, select the “Add a record” icon located at the far upper left of the tool bar.



3. The State entry screen should look like the following:



4. Enter a new State based upon the state code and name determined by the U.S. government.
5. After you have completed entering a State, click the diskette icon listed on your toolbar to save the information.



You have successfully completed entering information into U.S. State Maintenance. If you wish to enter more States, repeat the steps in this chapter.

Note: Changes to Newton CIA will only take effect once you completely exit out of the software.

Chapter 28

Backup

In This Chapter We Will Cover:

- Backing up Newton CIA data and attachments.

As with any business software package, Newton CIA should be backed up daily. No one should be using the software at the time of the backup, or it will be incomplete.

The first thing to backup is the database. Unless your firm has purchased a special version of Newton CIA using your choice of database, use the following directions for backup. You will need to backup two files, which will normally be found in the CIA directory at the root level of your hard drive (C:\CIA\). The file names are:

Cia_db.db
Cia_db.log

These files are too large for backup to floppy disk, so we recommend using a Zip drive, a recordable CD or tape.

The next thing to backup are your case images and text documents. These are normally stored in the IMAGES folder within the CIA folder (C:\CIA\IMAGES\). Backup everything in this folder.

Finally, you must backup your case letters. These are normally stored in the LETTERS folder within the CIA folder (C:\CIA\LETTERS\). Backup everything in this folder.

Here's a quick list of what you need to backup:

1. C:\CIA\Cia_db.db and C:\CIA\Cia_db.log
2. C:\CIA\IMAGES*. * (Everything in the folder)
3. C:\CIA\LETTERS*. * (Everything in the folder)

If you have a network version of Newton CIA, the database will always be on the server, and the image/text documents and letters should normally be there as well. If you configure the software to store the documents and/or letters elsewhere, this will make your backup routine much more complicated.