

# ***NEWTON CIA***<sup>TM</sup>

## **User's Guide**

Version 1.29

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# INTRODUCTION

Welcome to Newton CIA!

This guide will introduce you to the most affordable, sophisticated and easy-to-use customer support software available to business today. Here you'll learn how to record customer complaints, compliments and inquiries, track open cases, generate reports and follow up with customers.

Newton CIA, which stands for Customer Intelligence Administration, helps you respond quickly, accurately and consistently to post sales customer contacts. And it's flexible too. Whether it's a fast-talking caller or a detailed letter, a fax or a walk-in visitor, Newton CIA lets you, the user, respond to customer inquiries and complaints the way you find appropriate, rather than programming your answers for you.

The system permits you to "type as you talk," letting you enter information while a customer is offering it. At the same time, Newton CIA ensures that all key items are collected.

## **Terms:**

Before going further, it will help to explain certain terms about Newton CIA.

Case: All communication about a specific contact with a customer, dealer or supplier. This can include complaints, compliments, or inquiries. It can consist of a series of communications or just a single message, whether by phone call, letter, e-mail, etc. In Newton CIA, a case can include several "tabs," or categories, of information.

Window: The display on your computer screen, or just one part enclosed by a box. Such boxes can contain several related information fields. They can also contain sub-boxes for different groupings of information, called windows or areas.

Tab: A type of window for collecting and displaying case information, named for their “tab” labels which appear at top (they’re designed to look like the tabs on file folders). Each tab covers a different topic area within a case. Do not confuse with “TAB,” which refers to a key on the keyboard.

Field: A category of information, or the space that contains it. A field can be a single character, a line or a large block of text.

Menu Bar: The row of written drop down menus at the very top of the screen.

Tool Bar: The row of buttons directly underneath the menu bar. They let you access functions from within the menu bar directly.

Record: This term can refer to information about a customer, a product or a subject. Usually the contents of a window or sub-window are considered a record. A case can have more than one of each of these items — each one is considered a separate record.

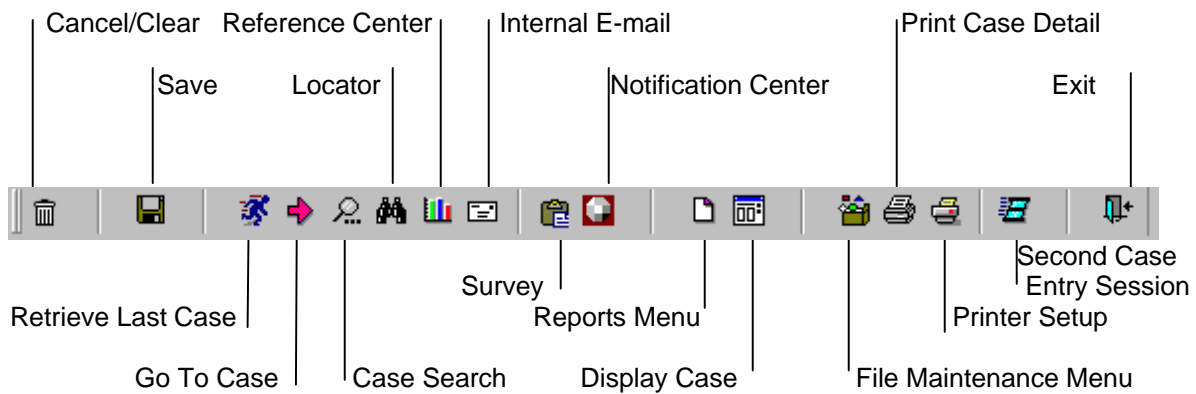
User: A person registered to use Newton CIA. This person answers customer inquiries, receives complaints, and provides customer satisfaction. Also known as “Advisor.”

Drop-down List: A menu of options that pops up or down by pressing a button. Also called “pop-up menus.”

In this guide, all keyboard buttons are spelled out using all capital letters. This will prevent them from being confused with buttons on the computer screen.

## Using the Tool Bar

Just under the menu bar at the top of the screen is the tool bar, a row of buttons for commands or features you’ll use often. Through the tool bar you’ll have access to almost every working area in Newton CIA. Below is the tool bar from Case Entry, the heart of Newton CIA. You’ll learn more about these buttons as you go through this guide.



Several of the buttons you see on the Case Entry tool bar above are common in other features of Newton CIA. The Save button always allows you to save new or changed information on the current window or screen. The Cancel/Clear button removes new or changed information, and resets the screen (nothing is saved). Printer Setup allows you to change how your printer is configured. Print will print out the contents of the current screen or window. Finally, the Exit button will close the current window.

Navigation tip: This guide is written assuming you have a mouse attached to your computer. If you don't, however, the TAB key will move the cursor through the information fields in each window. Where there are pop-up menus, the arrow keys (up, down, left, right) will scroll through the options. This holds true throughout Newton CIA.

Tip: Many features and buttons in Newton CIA can be executed using "accelerator keys". An accelerator key is shown by an underlined letter in the text description of the button or menu item. You can execute the button or menu item by pressing and holding the ALT key, and then pressing the letter you see underlined (then release both keys). This can sometimes save the time it takes to reach for a mouse.

As a final help, the illustrations in this manual are designed to show how useful Newton CIA can be. They show how a fictional company would use the software in its day-to-day business. In some cases, the illustrations relate to each other to demonstrate Newton CIA's versatility and how the different features work together. If an illustration suggests a useful way of handling your own operations, feel free to copy the example.

# CHAPTER 1: CASE ENTRY

All information gathering in Newton CIA starts with Case Entry. Whenever a customer calls, writes, faxes, e-mails or walks in the door with a new complaint, that is when you should open a new case. Even a company agent or distributor might bring a new case. It could be a compliment or just a request for more information. Whether it means a problem needs to be solved, or information needs to be retrieved, or a message should be forwarded, the point is that a case starts with a communication about a particular issue.

In this chapter you'll learn about cases – how to open them, how to make changes in them and how to file them.

## Logging On

To start using Newton CIA, you must first “log on” or identify yourself to the system. Your company’s Newton CIA administrator will provide registration for this to you.

On the opening window, enter your user ID, company ID, and password if necessary, then press ENTER.

Below, two buttons will pop up, saying, “Continue Log On” and “Fast Path.” Press Fast Path to enter Case Entry directly. It lets you go right to work. Press Continue Log On to enter the Notification Center, which provides communication with other Newton CIA users. (The Center is described in detail in Chapter 4.)

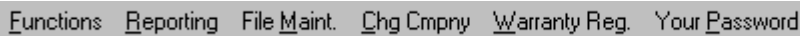
**Continue Log On**

**Fast Path**

## Case Entry

This is the central work area in Newton CIA. It helps you record communications with customers, and access all the information you may need to help them.

When you first open up Case Entry, you'll see several things. At the top of the screen is the menu bar, which lists a row of commands, some of which activate drop-down lists. These commands access all the main functions of Newton CIA.



Below that is the tool bar, a row of buttons that you'll use often. It provides fast, easy access to the tools and features of Newton CIA. These will help you work with customers on the phone and, notify company officials about problems quickly as you work in Case Entry.



A file folder with several tabs occupies most of the Case Entry window, starting with Full Case entry. Each tab covers a different function or topic in Case Entry, such as memos attached to the case, letters to outside clients, and images of case documents or pictures. There's even a tab called User Page reserved for special information that your company uses.



## Entering and Saving Cases

Entering a case is almost as easy as, "Just start typing."

Choose whether you'll use "Full Case" or "Quick Case," and fill in the information fields as you go. While Full Case and Quick Case are explained in Chapter 2, your company may set a policy for what situations should be Quick vs. Full Case.

In Full Case, you can start recording new areas of information by moving from tab to tab. Just click on the desired tab label. Even if you haven't completed one tab, you can move on to the next, unless there's a problem with the data you've keyed in. This helps you add information as you receive it, in whatever order the customer tells you.

Tip: When you finish keying in data to your last field on each tab or window, be sure to TAB key out of that field. This tells Newton CIA that you want the new or changed information in the field accepted.

As you become familiar with Newton CIA, you'll know what kinds of information goes where, and in what order. But you don't need to know that to start using Newton CIA.



When you're ready to enter or save a case, click the "Save" button (with the diskette) at upper left in the function bar. You can also click on "Process a Case"

under the Functions menu of the menu bar. Both of these store the new information and clear the window for the next case. They also save new information added to an existing case.

While many information fields can be left blank in the tabs, certain information is mandatory, and Newton CIA will not save a case without it. Blue, underlined labels tell which information fields are mandatory. First Name These fields are determined by your company's Newton CIA administrator.

Tip: Even though Newton CIA will let you skip over mandatory items to keep up with a customer's wandering conversation, it will remind you that the case is missing vital information if you try to save it prematurely. Before a caller hangs up, attempt to save the case. That will save time and hassle for the customer as well.

## Canceling Case Entry



To erase new information in a case before it's saved, click the "Cancel/Clear" button (with the trashcan icon) at upper left. This completely clears all information entered into a new case or removes any information added to the case since it was last saved.

Caution! Because this erases all new, unsaved information, using this button carelessly can delete information you want to save.

Tip: The moment you click the "Save" button for a new case is the time when Newton CIA assigns a case ID number to it. So if you start typing in information for a new case, and then realize it isn't necessary, just click the "Cancel/Clear" button. This way you can avoid creating a case with useless information.

## Starting a New Case

To start a new case, click on the Save or the Cancel/Clear button, depending on whether you want to save or erase the information already on screen. Either button will clear Newton CIA to accept a new case.

## Selecting and Modifying an Existing Case

Newton CIA offers several ways to retrieve an existing case, whether you want to review it, add new information or change previous work.



- 1) Use the "Retrieve Last Case" button above (with running-man icon) to reopen the case you last saved. The last case number is shown in the lower left hand portion of the Full and Quick Case tabs. This button only works for cases saved in your current session with the software. If you've just opened Newton CIA, it won't know anything about your previous session (Your last case number will equal zero).

Or,



- 2) Use the "Search" button (with the magnifying glass icon) to find cases. You can search by customer name, case number, state or city, zip code, CIA user



name, work phone number or home phone number. Double click on the case and it will be loaded into Case Entry. Case Search is covered in Chapter 3.

Or,



- 3) Use the “Go To Case” button (with the arrow) to go directly to a case whose number you know.

After adding or changing information in the case as necessary, click the “Save” button to store the case.

Tip: You can also use the mouse to select “Search Cases” under “functions” in the menu bar.

Tip: You can access cases in the Notification Center under the User Open Cases tab.

In certain circumstances, the case you’re trying to retrieve may be locked or in use by another user. A notice saying, “The case is already in use” will appear whenever a case is not retrievable. See your company’s Newton CIA administrator if you cannot access necessary cases.

## Case Security

Newton CIA also assigns a “security level” to cases. If your security level is lower than that assigned to a case, you won’t be allowed to retrieve it. See your company’s Newton CIA administrator if you think your security level has been set incorrectly.

Newton CIA can also be set up so that you can only work with cases that you have added, or possibly only cases added by your work group or team. Your company’s Newton CIA administrator will explain if any such limits have been placed on you.

Your company’s copy of Newton CIA may be set up to require a password when you sign on. It may also have a requirement that you change your password after a certain number of days or weeks. If this is so, or if you just want to change your password, use the option on the menu bar that reads “Your Password”. If Newton CIA isn’t set up to require passwords, this option will be faded and unavailable.

## Exiting Newton CIA



To quit or exit Newton CIA, click on the “Exit” button on the right end of the tool bar or on the Exit command in the Functions menu of the menu bar.

If you have made any unsaved changes to a case, a window will pop up asking if you want to save the changes, ignore the changes or cancel your exit request.

# CHAPTER 2:

## CASE DATA COLLECTION TABS

In every case, there are several different kinds of information to collect. While many cases require checking varied details, others are much quicker to complete.

That's why Newton CIA is organized in tabs. The tabs let you collect the information in the case easily and quickly. There's even a tab to let you handle simple cases faster. Since every case is different, you can use the tabs you need and skip the ones you don't.

In this chapter you'll learn about tabs – what they are, what they do, how to use them, the difference between Full Case and Quick Case, and how to use function buttons on the tabs.

### Full Case Tab

Newton CIA opens with the Full Case tab, because normally you'll start entering customer complaints and inquiries using this window. The Full Case tab is designed to record a summary of the case, leaving other details for the remaining tabs. It allows you to use the full range of tabs in order to compile information needed to solve problems or answer relevant questions.

Alternatively, you can select the Quick Case tab for cases that involve simple inquiries or minor requests, since it collects only the most basic information. This is explained later in this chapter. Your company may have a policy about when to use Full Case or Quick Case.

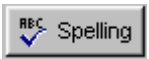
The Full Case tab has fields that let you record how the customer contacted you (the "Method" field), their reason for contacting you, case status, case date, case priority, quantity of product records in the case and your user name. Some of

these fields will be filled in automatically by Newton CIA, though you can change them where necessary or appropriate. The Full Case tab also features a “Verbatim” field for typing in a summary of the customer complaint or problem.

To begin recording case information on this window, click on or tab to each field of the screen and type in the information, using your mouse or arrow keys to scroll down through drop-down lists where they appear.

Tip: You can use TAB to move the cursor to each field on the window. This way you can make sure you collect all information recorded on this window – and every window. TAB cycles through every field on each screen in Newton CIA. To return to previous fields, push or press TAB while depressing the SHIFT key.

Tip: You can also change information in a field by selecting or highlighting the entry and typing over it.



If you want to check your spelling in the verbatim field, click anywhere in the field, and then click on the “Spellicheck” button next to the field at lower left.

The “Mode” field shows how Newton CIA is being used. “Add” means you are creating a new case. “Update” or “Edit” means the you are changing an existing case on file.

## Quick Case Tab

When a case is simple or needs only limited information, the Quick Case tab may be the most appropriate way of handling the customer contact. It's most useful when tracking calls or just answering short questions – from the Reference Center, for example. Check your company's policy.

The screenshot shows a software interface with two tabs: "Full Case" and "Quick Case". The "Quick Case" tab is active. The interface includes the following fields and controls:

- Case Number:** [Empty]
- Advisor:** DEMO
- Input Date:** 07/25/2000
- Mode:** ADD
- Case Status:** Q
- Method:** CALL
- Reason for Call:** INFOR
- Country:** USA
- State/Prv:** TX
- Zip Code:** 79108
- Zip + 4 (US):** [Empty]
- Occurred Date:** 07/25/2000
- Verbatim:** Anna Sheridan of Amarillo called to check prices of touring bikes.
- Spelling:** RBC [checked]
- Product:** B4220 (Voyager Bike)
- Issue:** [Empty]
- Location:** [Empty]
- Last Case:** 0

To use Quick Case, open the Quick Case entry screen by clicking on the Quick Case tab.

The window displays most of the same fields as found on the Full Case tab, along with information about customer location, product, issue and company or dealer location. When you enter information in Quick Case, you'll see most of the other tabs disappear – they're no longer necessary.

Your company may require a full report for certain types of cases, depending on circumstances. If so, a notice will pop up and the screen will revert to the Full Case window, with all the other tabs available. Any information you have entered in the Quick Case tab will be transferred to the appropriate tab in Full Case mode.

## Customer Tab

This tab is dedicated to information about the customer, dealer, supplier or anyone involved with the case: who it is, their company, address and phone numbers, job title and notes about how to reach them.

The tab can record several contacts within a single case, and identify customers who have contacted you before.

The information reported here is used by other windows and functions within Newton CIA, so it's important to fill out correct and complete information on this page. Many of the fields on this page are labeled as mandatory information fields for that very reason. The Letters window uses information on this page to address its letters. Notes in the "phone memo" field about how to reach the customer are used in the CIA Notification Center calendar, which is explained later.

To open this window, click on the Customer tab at the top of the screen, next to Full Case.

If this is a new case, the Customer tab will appear with all blank fields, ready for you to fill.

To add another customer record within the current case, click on the "Add a New Customer Record" button at bottom left.



Tip: Newton CIA saves you time by automatically capitalizing the first letter of the name related fields in the Customer tab. It will capitalize each separate word in the Company, Address and City fields, after you exit out of them.

Tip: Don't type parentheses or dashes in the phone number fields. Newton CIA automatically inserts dashes into seven-digit phone numbers. Remember to type three-digit area codes separately. It also adds the period after titles such as Mr., Mrs. and Dr.

Tip: Save time by typing in the zip code first. When you TAB out of the zip code field, Newton CIA will either fill in the city and state automatically, or show you a selection window for the appropriate city. Just click on the one you want, and this information will be filled in for you.

If you don't know the zip code, type in the state, then click in the Zip Code field and press ENTER. You'll be shown a window with a list of zip codes organized by county. Be careful, since each county may have more than one zip code.

The "Repeater Check" button at the bottom of the screen will look through all previously recorded cases to see if the current customer has called in the past. This will help you determine if the customer needs more in depth help, or is possibly abusing your company's consumer affairs policies. Note that your company may set Newton CIA up to run Repeater Check automatically.



To use Repeater Check, fill out the "First Name" and "Last Name" fields, then click on Repeater Check. Newton CIA will display any names that match. If there is a match, Repeater Check will list every time the customer has previously made contact with your company through Newton CIA. If Repeater Check does show you one or more previous contacts, you can double click on any one of them, and the address information from that case will be automatically loaded into the current Customer record.

Tip: Repeater Check only works if names are typed in with the same or similar sounding spelling. If you believe a customer is already recorded, but Repeater Check can't find him or her, try alternate spellings, like "Rob" or "Bob" for "Robert."

The "Work With Followup Entries" button will take you to a window that shows you all calendar followups for this case, and that will allow you to enter new ones. Followup entries are covered in more detail in Chapter 4.



## Product/Issue Tab

The screenshot shows the 'Product/Issue' tab interface. The top navigation bar includes 'Warranty', 'Full Case', 'Customer', 'Product/Issue' (selected), 'Memo', 'Letter', 'Enclosure', 'Notice', 'Image', 'User Page', and 'Quick Case'. The left sidebar shows a tree view with 'B4220' selected, containing 'DEFECT' and two 'Not Selected' items. The main area is divided into 'PRODUCT' and 'ISSUE' sections. The 'PRODUCT' section includes fields for Product (B4220), Item Number (N260), UPC/SKU Code (NKR5668930), MFG Code (515-C-35), and Location (CT042). The 'ISSUE' section includes fields for Product Assigned to (B4220), Issue (DEFECT), Finding (UNASG), and Survey (empty). There are also buttons for 'Run Survey' and 'Previous Survey On File?' with a 'N' button. At the bottom left, there are buttons for 'Add Product' and 'Add Issue'.

This tab records what product or service the customer is calling about, as well as the general nature of any problem. While the tab can record several products, it can also record several issues for each product. It also lets you administer customer surveys for more detailed information.

The Product/Issue tab is divided into an Overview window on the left, showing all of the products and issues in the case (and how they relate to each other), a Product Information window and an Issue Information window. The Product Information window, which fills the upper right half of the window, contains fields for product name, item number, UPC/SKU number, lot number, manufacturing code and location of the dealer which sold the product.

Below that, the Issue Information window records information about product problems or topics, as well as your findings about the situation. Just as you can record several different products, you can also record a variety of problems on each product.

Note that the Product/Issue Overview window will describe each product and issue as "Not Selected" until you select a specific product or issue in the detail windows. When you click on a product or issue in the Overview window, the detail for that selection is automatically displayed in the Product and Issue Information windows to the right.

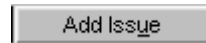
Fill in the Product Information window first. When you select a product, you'll notice that every associated issue is updated with that product code.

To list an additional product in the current case, click on the "Add New Product" button at lower left. This adds a

Add Product

new product with a first issue (both labeled “Not Selected”) to the Overview, and clears the Product and Issue Information windows.

To record a new issue for a given product, click on the “Add New Issue Record” button. This will add a new “Not Selected” issue to the current product.



If you have several products and issues, you can click on one of them in the Overview, and then use the up or down arrow keys to bring up details on the others.

Occasionally you may need to ask customers more detailed questions about their product or issue. Prepared surveys can be accessed from the Issue Information window.

The Previous Survey on File field at lower left tells whether a survey has already been administered for that particular product-and-issue combination.

To run a customer survey, choose the appropriate survey in the “Survey” field. The Survey window will open up. If a previous survey has been recorded, click the “Run Selected Survey” button at the bottom of the window. This will bring up the Survey window so you can review the previous answers.



The Survey function is explained in Chapter 3.



## Memos Tab

Date	Time	Owner	Memo Subject	Change Status
07/25/2000	04:15:04 PM	DEMO	Voyager replacement	00/00/0000 00:00:00 AM

Subject: Voyager replacement

Text: Inventory records show that we don't carry this bike anymore--it was sold on clearance. Replacement was ordered the same day. Customer was informed that this would require at least an extra week.

Spelling

Add a New Memo

### Selection Window

### Information Entry Area

You use this tab to attach and read memos about the circumstances of a case. It is divided into two windows.

The upper window is the Memo Selection Window, which lists information about case memos: date, time, writer, topic and change status of the memo. This window lets you open existing memos for editing. The lower window is the Memo Entry Area, where you write and edit memos.

To write a memo, click on the “Add a New Memo” button at lower left.

Add a New Memo

A “Subject” field and a text field will appear below, allowing you to summarize and write the memo.

When a new memo is opened, a date and time will automatically appear in the Memo Selection Window above. The memo’s summary in the Subject field will appear in the Memo Selection Window when you move to the next field.

Spelling

You can also spell-check the text field of a memo by positioning the cursor in the text field, and then clicking on the Spellcheck button at lower left.

To go back and edit a memo, select the appropriate memo in the Memo Selection Window. Its details will automatically appear in the Memo Entry Area.

Tip: Only the user who created a memo can make changes to that memo later on. Other users can only view the memo.

## Letters Tab

Date	Letter ID	Format	Addressee	Letter File Name
JUL 25, 2000	1	LTR01	Brad K. Cochran	C:\CIA\LETTERS\L80.DOC

**Letter ID #: 1**

Letter Format:  Addressee:

Send Copy To:

Copy To's On Letter:  Yes  No

Enclosures On Letter:  "Encl."  List  No

Special Instructions to print on letter:

PC Letter File Name: C:\CIA\LETTERS\L80.DOC Last Review By: DEMO 07/25/2000 04:32:42 PM

This tab lets you select pre-defined letters for mailing to customers, and to edit them if necessary. It has selection and information entry areas like the preceding Memos tab.

The Letter Selection Window records the date, time, addressee, and letter code used to format the letter and the computer file name of the letter to the customer. It allows you to call up letters on file in the case.

The lower portion is the Letter Information Entry Area, where you select the letter format and prepare it for mailing. This includes creating the letter, addressing the letter, and any special mailing instructions.

To prepare a letter for a customer, click the “Add a New Letter” button in the lower right corner. This opens the Letter Information Entry Area. Each time you do this, you’ll notice a “Letter ID #” in the upper left hand corner of the Letter Information Entry area. You’ll use this number to assign enclosures to be mailed with the letter when you work in the Enclosure tab.

Letters are created from formats, which are simply form letters defined by your company’s Newton CIA administrator. To select a letter format to use, click on the drop down list for the “Letters” field, which lists the templates available. Then click on the desired letter.

To address the letter, click on the “Addressee” field and select the addressee. This field lists the customer names entered previously under the Customer tab, and will use their addresses when printing the letter.

To list “carbon copies” for other addressees, click on the “Send Copy To” field and type in one name per line. Newton CIA can list up to five copy to’s for a letter.

The “Special Instructions” field lets you type in instructions about how to mail the letter, such as rush, certified mail, needs signature, etc. These will print out on a separate sheet of paper printed preceding the letter.

To select whether to list enclosures (selected in the Enclosure tab) or additional copies on the letter, choose “yes” or “no” on the toggle buttons at right, labeled “Copies On Letter” and “Enclosures On Letter.”

Tip: In the “Enclosure On Letter” toggle box, the first option merely prints “Encl.” at the bottom of the letter, without listing the actual enclosures. The “List” option will print “Encl.,” followed by up to 10 enclosures you have defined in the Enclosure tab. If you want to use the “List” option, you’ll need to assign those enclosures before you click the “Prepare PC Letter File” button, and Microsoft Word creates the letter. Otherwise you’ll have to add the enclosures yourself.

After all this advance work is done, you may now create the letter by clicking on the “Prepare PC Letter File” button at lower left. This creates the letter as a Microsoft Word document off screen. It does not automatically open the document on screen. Once this function completes, you’ll notice that this button will fade, signifying that it’s no longer available for this letter. The “Execute Word Processor” and “Print Letter” buttons will now be available. The data fields in the Letter Information Entry area will be darkened and protected for this letter, since they shouldn’t be changed once the letter has been created.



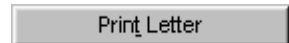
When your Newton CIA Administrator sets up the letter formats, he or she may include instructions that tell Newton CIA to get details from the current case for the letter. This usually works without requiring you to do anything. Sometimes, however, the case may have more than one product or issue, or of some other detail. Then you will get a small window that asks you to decide which of several details shown should go into the letter. Simply click on the one you want, then click the OK button.

The window could also ask you a question, for which it expects you to type in an answer. Just type your answer in, and press the ENTER key. Newton CIA will then finish the letter.

To customize a letter, click on the desired letter in the Letter Selection Window, then click on the “Execute Word Processor” button below. This will open Microsoft Word with the letter loaded on your screen.



If you want to print the letter without opening Microsoft Word, click the “Print Letter” button.



Tip: If you want to list more than five “carbon copies” on the same letter, add extra names directly to the letter by editing it in Microsoft Word.

## Enclosures Tab

Warranty

Full Case Customer Product/Issue Memo Letter **Enclosure** Notice Image User Page Quick Case

Add Group Select Enclosure Group Select Letter Add By Group

NORSP

Letter Sent In	Enclosure Code/Description	Quantity	Value
1	ENVLP Envelope	1	\$0.11
1	COUP1 Coupon 50 cent	1	\$0.50
1	COUP2 Coupon \$1.00	1	\$1.00
1	BROC1 Brochure	1	\$3.00
1	PSTGE Postage	1	\$0.32
<b>Total Enclosures:</b>		<b>5</b>	<b>\$4.93</b>

(Note: double click on line to delete)

1 COUP2 Coupon \$1.00 1 \$1.00

Letter Sent In	Enclosure Code/Description	Enclosure Detail	Quantity	Value

Add Enclosure

This window lists the enclosures, such as coupons, warranty information, brochures, change-of-address cards, etc., which can be sent in response to a customer complaint or inquiry. Enclosures are often bundled into “enclosure groups” because it may save time to send a customer a combination of several items at once. These groups are set up by your Newton CIA administrator.

This tab lets you choose the appropriate enclosure or enclosure group to resolve a problem or answer a question.

The tab is divided into three windows. On top is the Enclosure Group Entry area, which is obviously used for adding whole enclosure groups, not individual enclosures. To add a group, select the code for the group you want in the Select Enclosure Group field, then select the number of the letter you want these enclosures to go with from the Select Letter field. Now click on the “Add Group” button, and the enclosures will be written to the Enclosure Listing area.

In the middle of the tab is the Enclosure Listing area, which describes every enclosure selected to send to a customer in this case.

Tip: Don't be confused by the term “enclosures,” if your company uses it only to refer to the envelopes, postage and packaging that actually enclose the articles delivered to customers. Newton CIA uses the term “enclosure” to refer to all parts of a piece of mail.

The Enclosure tab automatically adds up the cost of the enclosures you have selected, so that you know how much you are spending to resolve a case. Your Newton CIA administrator may have set a limit on how much you can spend. If you exceed that limit, you will receive a warning message stating that your supervisor will be alerted of the situation when you save the case. If you wish, you can reduce enclosure quantities to get below the limit.

To remove an enclosure, double click on it.

If you click on a row in the Enclosure Listing area, that row will be loaded into the Enclosure Detail area at the bottom of the tab. Here you can change the elements of the row, and they will automatically be written back to the Enclosure Listing area, with the totals updated.

1	COUP2	Coupon \$1.00	1	\$1.00
Letter Sent In	Enclosure Code/Description	<b>Enclosure Detail</b>	Quantity	Value

To add a single enclosure, click on the “Add Enclosure” button at lower left. This will clear the Detail area so that you can define a new row, which will automatically be added to the Enclosure Listing area.



Sometimes you may need a place to track the value of goods or services you have given a customer to resolve a case. You can record this type of expense in the Enclosure tab by using the Enclosure Code “REIMB”. Using this code will allow you to put in a freeform description and value. Just type in the code, then TAB out of the Enclosure Code field. The Description and Value fields will be open for you to use.

## Notices Tab

Date	Time	Subject	Agent	Location
JUL 26, 2000	02:32:28 PM	Speed gear S series rapid-fire shifter		AMF01

Agent:  Location:

Subject:

Text:


Printed On:  Faxed On:

The Notices tab is used for writing and sending notices about the case to dealers, suppliers, and partners outside the company, as well as individuals or departments inside the company.

The window is divided two parts. On top, the Notice Selection Window shows any notices regarding the case that have been previously created. It shows information about the date, time, subject, agent, and location involved in the notice.

Below, the Notice Information Entry Area allows you to enter the details of each new notice, or shows details of previous notices. Note that "Agent" refers to an individual, whether by name or title. "Location" refers to a group, whether it be a store or dealer, department or any other type of group, whether part of or outside of your company. Agents and Locations are set up in Newton CIA by your company to meet your needs.

To enter a notice,

- 1) Click on the "Add a New Notice" button at  lower right.
- 2) Enter a brief description or summary of the notice in the Subject field
- 3) Type the message in the text field.
- 4) Identify the agent in the "Agent" field. Alternatively, identify the store, dealer or whatever in the "Location" field. **Caution:** Don't list both an Agent and a Location for the same notice. Choose only one.

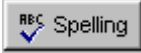
At left are three buttons: "Print Notice," "Fax Notice" and "Spell Check Notice Text." These help you distribute notices clearly without delay. This can be useful when you need to communicate quickly.



To print a notice, click on the notice in the Notice Selection Window, then click on the Print Notice button.

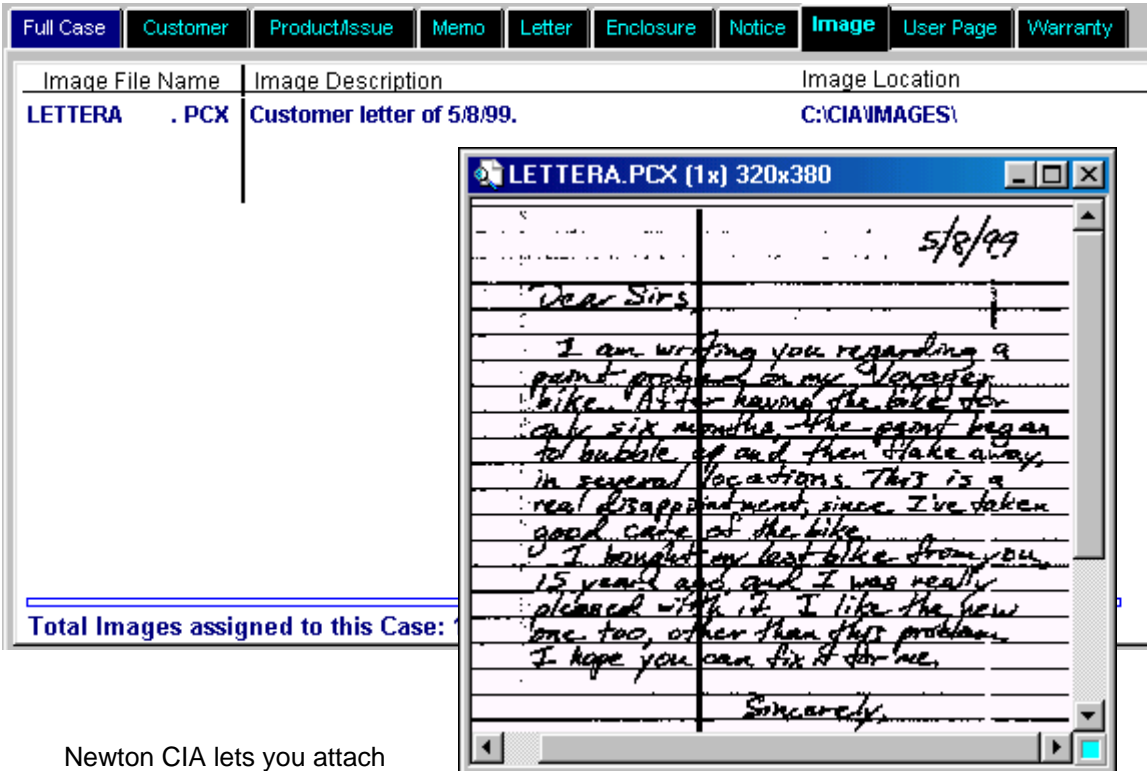


To fax a notice, click on the notice in the Notice Selection Window, then click on the Fax Notice button.



To check the spelling of a notice's text, click on the text field of the notice, then click on the Spell Check Notice Text button.

## Images Tab



Newton CIA lets you attach document files related to a case, so that you can view them quickly, without the trouble of going to a file cabinet. They can be letters, pictures or any other document related to the case.

The Images tab lets you view any assigned items. It lists all file types, descriptions and dates, as well as the total number of items in the case.

To view an item, double click on the row. This brings up the file in a viewing window.

The image window lets you magnify the image for greater detail using the Zoom In and Zoom Out commands under the View menu. You can also print copies of the image by using the Print command under the File menu.

To close the image, click Exit under the File menu in the menu bar.

Other commands under the View menu let you manipulate images on screen. These may be useful when viewing stored images.

You add images and text directly from the Images tab. The Paste Text button lets you add text you've copied from another program. The Attach Text and Image File buttons let you select a file to be copied into Newton CIA.

## Warranty Tab

The screenshot shows the 'Warranty' tab interface. At the top, there is a navigation bar with buttons for 'Full Case', 'Customer', 'Product/Issue', 'Memo', 'Letter', 'Enclosure', 'Notice', 'Image', 'User Page', and 'Quick Case'. The 'Warranty' tab is currently selected. Below the navigation bar, the interface is divided into several sections. On the left, there are two 'REC Spelling' buttons. The main area contains the following fields: 'Product:' with a dropdown menu showing 'B4220'; 'Serial Number:' with a text box containing 'AZ583102'; 'Claim Date:' with a text box containing '07/26/2000'; 'Claim Description:' with a large text area containing 'Frame is bent.'; 'Claim Type:' with a dropdown menu showing 'RPLCD'; and 'Claim Status:' with a dropdown menu. At the bottom of the interface, there are three buttons: 'Add New Warranty Claim', 'Registered Warranty Inquiry', and 'Warranty Claim Inquiry'.

This tab lets you check enter a claim against a warranty, and record information about problems that may be covered by the warranty.

The drop down list for the Product field will show all the products you have entered for this case in the Product/Issue tab. When you fill in this field and the Serial Number field, Newton CIA automatically runs a check to see if this warranty has already been registered. If it hasn't, you will get a message telling you that there's no registration.

Another check run at this time could result in a message telling you that there are previous claims against this warranty. You'll be given the option of going to Warranty Claim Inquiry to see the details. If you don't want to go immediately, you can do so later by clicking the "Warranty Claim Inquiry" button. Warranty Claim Inquiry is covered in Chapter 3.

To check details of a customer's warranty, fill in the Product and Serial Number fields. Click on the "Registered Warranty Inquiry" button below. This will open the Warranty Inquiry Window, which will display such information as the name and address of the customer, the product registered, dates of purchase and receipt, and location of purchase.



**Warranty Inquiry Results**

Serial No: **AZ583102**  
 Product: **B4220**  
 Registered To: **Michael Anderson**  
 Company:  
 Address: **1532 Redrock Trail**  
**Paducah KY 42003 USA**  
 Email Id:  
 Purchased At: **Paducah Cycle Time Paducah**  
 Purchase Date: **07/21/1999** Registration Received Date: **07/26/1999**

**Days After Purchase: 371 Days After Receipt: 366**

Next, fill in the details of the customer's warranty claim. The Claim Type and Status fields may or may not be used by your company.

To add new warranty records, click on the "Add New Warranty Record" button. This stores current information and clears the screen to add a new claim.



If multiple claims have been entered, use the scroll bar at right to access them.

You can check the spelling in both the "Claim Description" and "Disposition" fields on this page using the Spellcheck buttons.

See also Warranty Registration in Chapter 3, which is used for registering new warranties through Newton CIA.

## User Page Tab

This tab is reserved for your company, to customize and use to collect data that may be unique to your company, and that doesn't appear in any other tab. You may use drop-down lists or type data into the fields manually. Your Newton CIA administrator will determine how this tab is set up and used.

Warranty									
Full Case	Customer	Product/Issue	Memo	Letter	Enclosure	Notice	Image	<b>User Page</b>	Quick Case
New/Repeat?	REPEAT	Repeat Customer							
Bad Credit?	NO	No history of credit problems.							
Purch. Type?	SPARE PARTS	Customer has only purchased spare parts.							
History?	LESS THAN ONE YEAR	Active cyclist for less than one year.							

# CHAPTER 3: SPECIAL FUNCTIONS

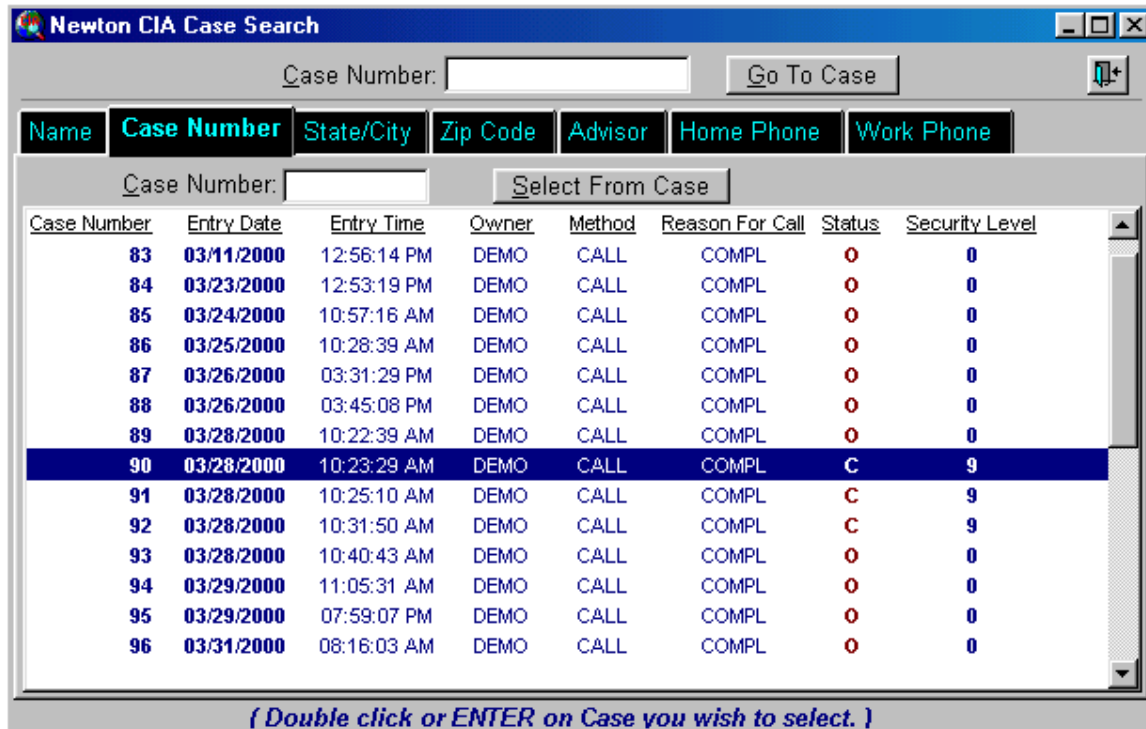
Besides collecting case information, Newton CIA has special functions that enable you to help customers, find information and communicate with company staff. For example, customers may want to know the closest place to buy your product, or they may want to register a new warranty.

In this chapter you'll learn about Case Search, the Where To Buy/Locator, the Reference Center, Display Case, CIA Internal Email, Warranty Registration, Warranty Claim Inquiry, Survey, Secondary Case Entry, and Print Case Detail.

## Case Search



Case Search helps you look up a case when you don't know the case number. It has seven tabs that sort the cases in different orders: by Name, Case Number, State and City, Zip Code, Advisor (Newton CIA User), Home Phone Number and Work Phone Number. You can choose the tab that will help you find the case you want most quickly and easily.



All the tabs have one or two selection fields at the top that allow you to cut down the number of cases you're looking at, in order to zero in on the one you really want. To use them, just fill in the values you want to cut down the case list to, and then click the "Select From" button.

Tip: You don't have to put complete values into the selection fields in all instances. For example, on the "State/City" tab, if you want to find cases in Raleigh, NC, you could put "NC" in the State field, but only "Ral" in the First Name field. This way you'll get all the cases in North Carolina with cities starting with "Ral", so that you'll see cases with the city spelled correctly as "Raleigh", or spelled incorrectly as "Ralley".

Once you've found the case you want, double click on it, and it will automatically be loaded into Case Entry (or Display Case, if you're working in that mode).

If you happen to remember the case number you need once you've opened up this window, just type it into the Case Number field at the top of the window, and click the "Go To Case" button.

## Where To Buy/Locator

If you want to help a customer locate your nearest store or dealer, use the Where To Buy/Locator (we'll use Locator, for short). This function identifies stores and outlets within about 150 miles of the customer, and it can provide extensive information as well, such as phone number, directions, contact information and more.



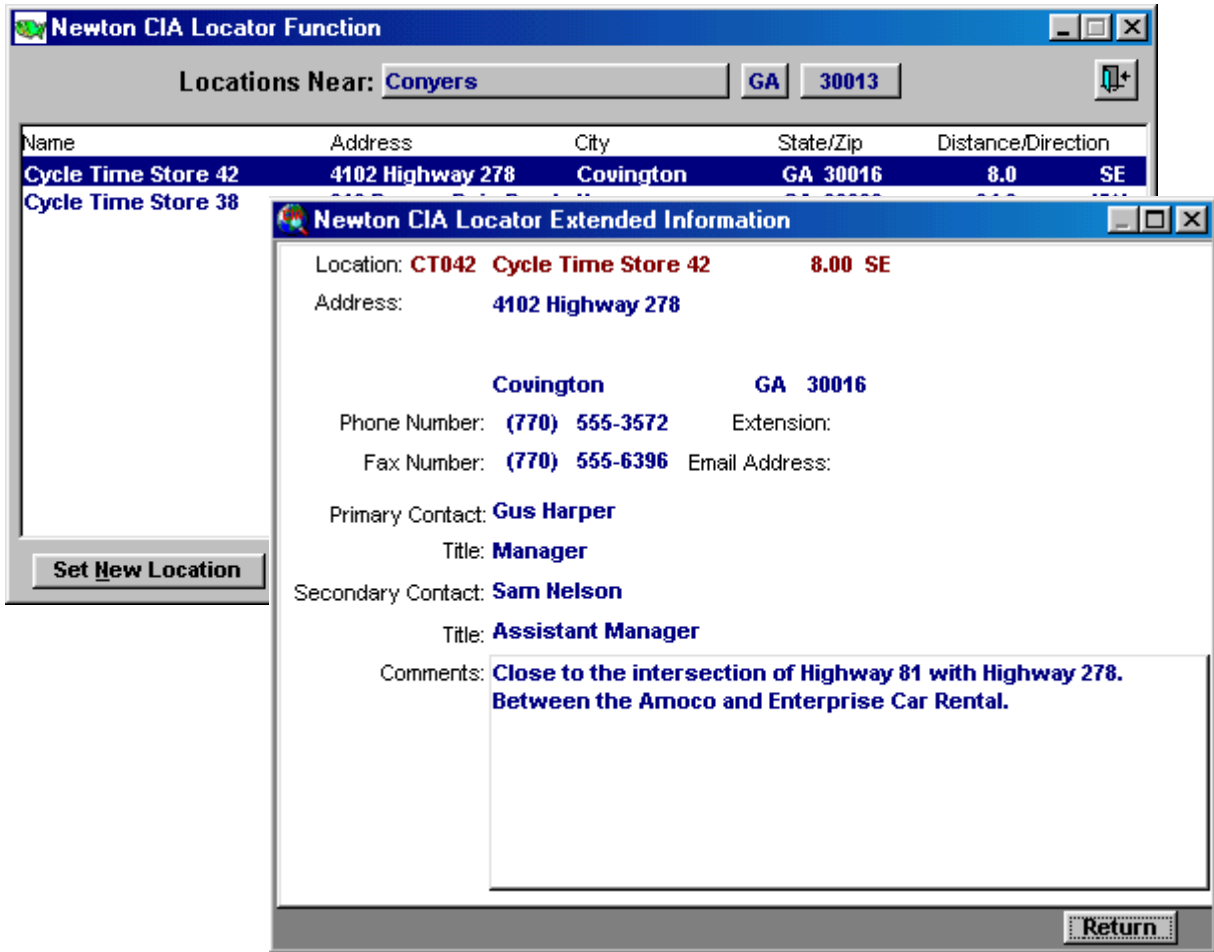
To use Locator:

- 1) Fill out the address information in the Customer tab.

- Click on the "Locator" button (with the binoculars icon) at center top on the function bar.

A Locator Window will pop up displaying the stores in range, their address, distance and compass direction.

You can also go straight to the Locator without filling in the Customer tab, and it will prompt you for address information.



The Map/Directions button will bring up internet based map tools. (You must be on line for these to work)

To find out more information about a particular location, click on it. The Locator Extended Information Window will pop up with store contact information and other notes.

To look up the nearest stores from another location, click the "Set New Location" button in the lower left corner.



Enter the city, state and zip code. At a minimum, the Locator function needs city and state information, or city and zip code, or zip code alone. It will not work with either city or state information alone.

Click ENTER. A new selection of locations will appear.

Tip: Remember, Repeater Check may help you save time when working in the Customer tab by automatically retrieving the customer's address.

## Reference Center



The Reference Center is a powerful tool for finding answers to customer questions. Depending on how your company organizes it, it can provide general information about your products and services, or it may provide answers for addressing specific problems. It can also have company background or policy, or whenever your company decides to load into it.

To open the Reference Center, click on the "Reference Center" button at center top of the function bar (with the bookshelf icon).

Tip: If you have a product and an issue filled in on the Product/Issue tab, the Reference Center will try to look those up first, as a Category/Subcategory combination.

Three windows will open: Reference Selection, Reference Text and Reference Images.

Reference Selection			Reference Images
Category	SubCat.	Description	Description
B1821	SPECS	Skateaway Jr. Specifications	Voyager Picture
B1932	SPECS	Glide Lite Specifications	Voyager assembly
B4220	SPECS	Voyager Specifications	Derailleur assembly
B5899	SPECS	Trailblazer Specifications	
B7500	SPECS	Skateaway Specifications	

Reference Text
<p>Sizes: Mens, Womens Colors: Mens &amp; Womens: Emerald Green/Cream, Black Pearl/Cream Frame: Hi-Tensile Steel, Classic Cantilever Fork: Unicrown, Hi-Tensile Steel Headset: 1-1/4" Steel Chrome Crankset: 6" One-Piece, 32t Bottom Bracket: One-Piece Steel Front Derailleur: N/A Rear Derailleur: Sahano Racer RT-33GS Shift Levers: SpeedShift MX-222, Right Hand Cog Set: Sahano GB-44, 14-28, 6-Speed Freewheel Chain: K-75 Hubset Low-Flange OS Nuted Front &amp; Rear</p>

In this example, the company has listed product information in the Reference Center. Clicking on a row in the Reference Selection Window loads text in the Reference Text Window. The Reference Images Window will list image files available for viewing. Clicking on them will open a viewing window like that described in the Images tab section in Chapter 2.



You can use the “Position To” button on the tool bar to set the Selection window to a Category/Subcategory that you want.



You can use the “Keyword Search” button to try to find selections based on a single word describing the type of information you want.

## Display Case

Display Case is a special mode that allows you to read cases, but not to add or change information. Certain users may only be given access to Newton CIA cases through Display Case.



To open Display Case, click on the “Display Case” button at upper right in the function bar (with the newspaper icon).

Salutation	First Name	MI	Last Name	Suffix	Customer Type
	<b>Vera</b>		<b>Chandler</b>		<b>CUS</b>
Company:					
Address: <b>9457 Asbury Lane</b>					
<b>Bergenfield</b>		<b>NJ</b>	<b>07621</b>	<b>USA</b>	
Title:					
Department:					
E-Mail ID:					
Home - Phone:	<b>(609) 555-4861</b>	Phone Memo:		<input type="text"/>	
Car - Phone:					
Fax - Phone:					
Work - Phone:		Extension:			

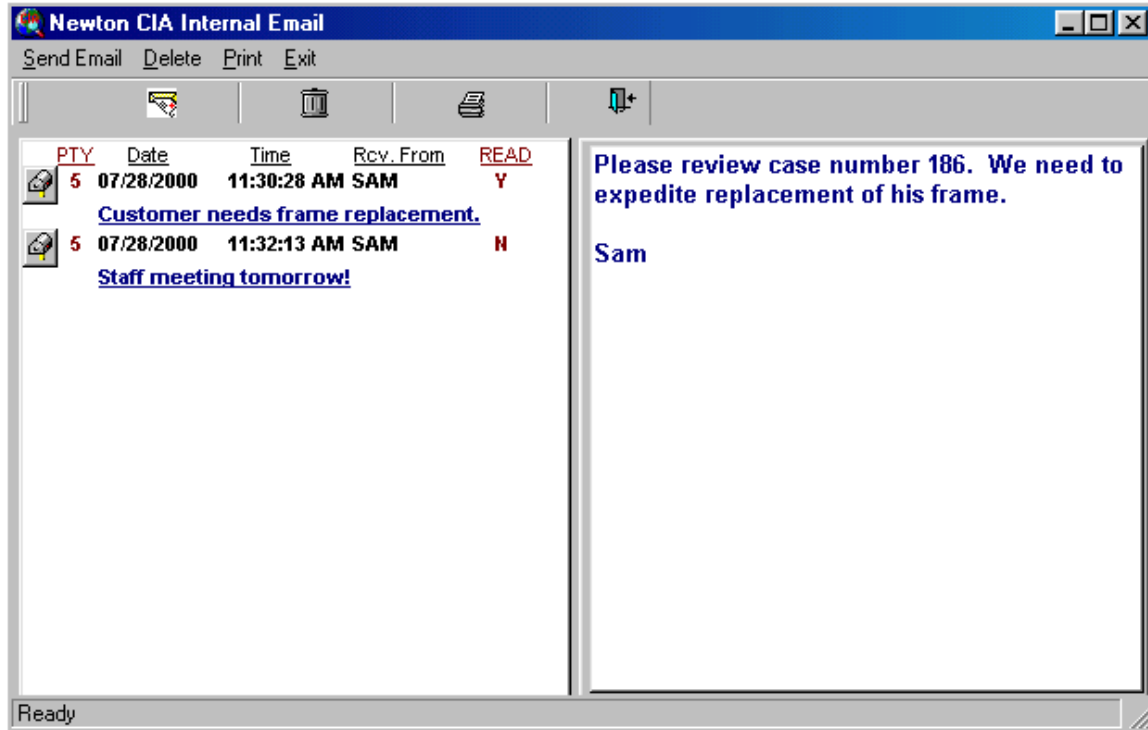
Display Case users may be restricted from viewing certain cases by the security features in Newton CIA, just like regular Case Entry users (see Case Security in Chapter 1).

This feature does allow you to add case memos in order to record comments about the case.

Display Case can search for and open all cases normally. It also has access to the Reference Center, Internal Email, Locator, and the CIA Notification Center on its tool bar. Users can print case information on screen using the “Print” and “Print Setup” buttons on the function bar.

To leave Display Case, click on the Exit button (with the door icon) in the upper right of the function bar.

## CIA Internal Email



This feature lets you exchange email with other users of Newton CIA.

When you click on a message summary on the left side of the window, the text of that message will appear on the right side. Note that the “READ” status for the message will then change to “Y”. As you use Newton CIA, you will periodically receive messages telling you that you have new email as long as any of those emails has a “READ” status of “N”.



To delete an email, click on the “Delete Current Email” button.

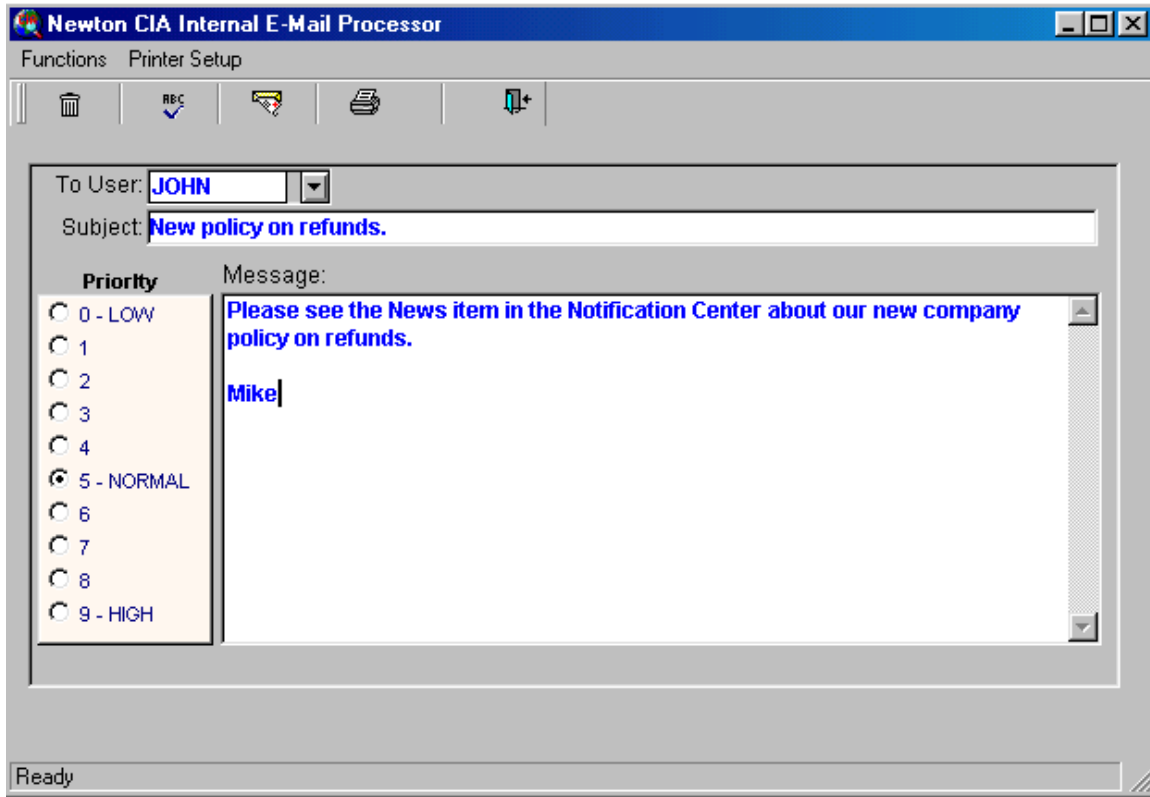


To print copies of an email, click on the “Print Current Email” button.



To send a new email, click on the “Internal Email” button at top center of the function bar (with the letter icon). This will bring up the message composition window (see below).





1. Select a recipient in the “To User” field by clicking on the drop-down list and scrolling down to the desired name, or just type in the user name.
2. Write a brief description in the Subject field
3. Write the message in the “Message” field.
4. Choose its priority in the “Priority” toggle bar.
5. Click the “Send Message” button (with the mail icon) to send it.



To clear the window and not send the email, click on the “Cancel Mail” button.

To print copies of a message, click on the Print Mail button.

To check spelling of a message, click on the Spellcheck button.

To configure the printer to print email messages, click on Print Setup in the menu bar above and select the appropriate printer. See your Newton CIA administrator if you have questions.

## Warranty Registration

To register a new warranty, click on Warranty Registration on the menu bar of the Case Entry screen. This opens the Warranty Registration Maintenance File.



It's divided into two windows. On top is the Warranty Selection Window. It lists existing customer warranties, including information on name, address, registration date and serial number. Below lies the Warranty Information Entry Window, which allows you to add or update registration information.

**Newton CIA Warranty File Maintenance**

Name	Product	Serial No	Regis. Date	City/State
Anderson Michael	B4220	AZ583102	07/26/1999	Paducah KY
Argo Abe	J5B-123456	123	03/30/2000	Conneaut OH
Fleming Billy	A5X-23456	747	03/30/2000	Fountain Hill PA
Hill Billy	N A5X-23456	512345	03/30/2000	Barnett VA

Product Code:

Serial No:

Name:

Company:

Address:

City:  State:  Zip Code:  Zip Plus4:

Country:

Email ID:  Registration Received Date:

Purchase Date:  Warranty Expiration Date:

Where Purchased:

City/State Purchased:



To add a new warranty, click on the “Add a Record” button at the left end of the function bar.

This opens the fields in the lower half of window. Fill them out, making sure to include mandatory information such as serial number.



To save a record, click on the “Update this Record” button at left on the function bar.

To update an existing warranty record, click on the customer listing in the upper window, which lists customers alphabetically by last name. Make necessary changes in the fields below, then click on the Update this Record button.

## Warranty Claim Inquiry

Product Code	Serial Number	Date	Type	Status	Case
A5X-23456	123	04/02/2000			102
A5X-23456	12345	10/08/1997			1
A5X-23456	12345	03/29/2000			94
A5X-23456	12345	03/29/2000			95
A5X-23456	12345	04/20/2000	APRTS	P	99
A5X-23456	6	04/02/2000	APRTS	H	102

(Click on line to display detail.)

Product Code **A5X-23456** Serial Number: **12345**

Claim Description: **Customer says his Easyclimb gear ratio upgrade kit for his Skateaway bike worked for six months, then broke. He wants a replacement.**

Claim Disposition: **This kit is on backorder.**

Case Number: **99** Claim Type: **APRTS** Claim Status: **P**  
Entered By: **DEMO** Claim Date: **04/20/2000** Time: **11:02:10**

Print Detail

This window lets you look at the history of warranty claims your company has received. It has two tabs. Each has a selection area on top, showing each claim as a row. Clicking on a row brings up detail for that claim in the bottom portion of the window.

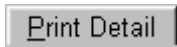
The first tab, labeled “Product”, groups the claims by product and serial number. This allows you to see if there have been multiple claims against the same warranty, and to review the circumstances.

The second tab, labeled “Owner Name”, helps you determine the customer’s overall warranty history with your firm, even over multiple products.

Both tabs have selection fields at the top that allow you to cut down the number of claims you’re looking at, in order to zero in on the information you really want. To use them, all you must do is fill in the values you want to cut the claim list down to, and then click the “Select From” button.

Tip: You don’t have to put complete values into the selection fields in all cases. For example, on the “Owner Name” tab, if you want to find claims made by a Michael Wilson, you could put “Wilson” in the Last Name field, but only “Mi” in the First Name field. This way you’ll get all the Wilsons with a first name starting with “Mi”, so that you’ll see claims made under “Michael” or “Mike”.

At the bottom of the window, the “Print Detail” button will print the lower portion of the window for any claim you have selected.



## Survey

There are two ways to access the Survey function. The first is from the Issue Information area in the Product/Issue tab, as described in Chapter 2.

Product Assigned to: ISSUE

Issue:   Defective Material

Finding:

Survey:   Voyager Satisfaction Survey

Previous Survey On File ?

The other is to use the Survey button on the Case Entry tool bar. This will bring up the Survey Status Listing window for the current case. This window shows all surveys that have been filled out for this case on the left side, and all surveys that remain available on the right.

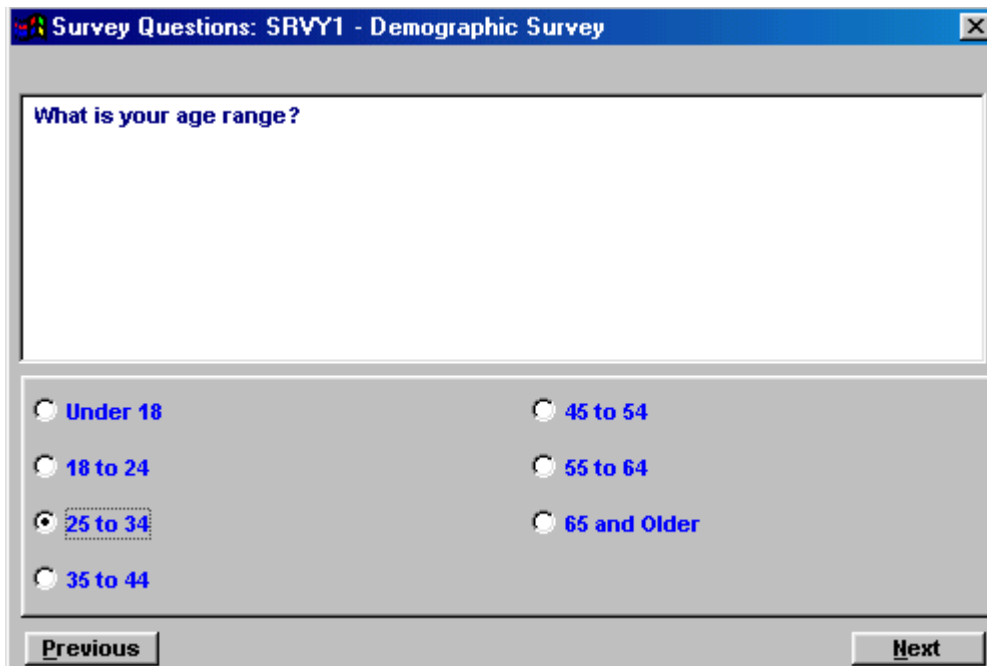
Surveys Done For This Case		Surveys Still Available	
Survey Code	Description	Survey Code	Description
SRVY3	Voyager Satisfaction Survey	SRVY1	Demographic Survey
		SRVY4	Moving Injury Survey
		SRVY6	Skateaway Rebate Interest

You can look through the answers in previously completed surveys by selecting one of the surveys listed on the left, and then clicking the “Review Completed Surveys” button. For a new survey, select one of the surveys available on the right, and click on the “Add New Survey” button.

Tip: You can double click on either side of the Survey Status window, and eliminate the button clicking step.

Newton CIA only saves one of each type survey per case, so each survey you conduct for a case moves from the right to the left side of the Status window.

The Survey window has two sections. The top holds the question being asked, and the bottom section is where you enter the answer. Some questions require one of a multiple choice list of answers, where you click on the desired answer.



Survey Questions: SRVY1 - Demographic Survey

What is your age range?

Under 18       45 to 54

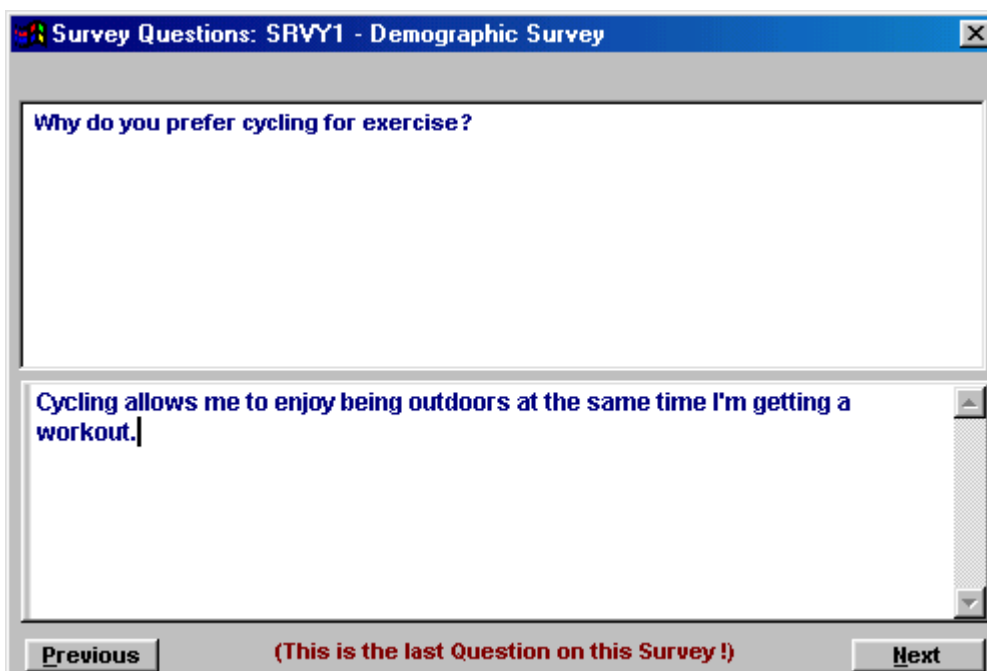
18 to 24       55 to 64

25 to 34       65 and Older

35 to 44

Previous      Next

Other questions allow free form text answers, which you simply type into the lower section.



Survey Questions: SRVY1 - Demographic Survey

Why do you prefer cycling for exercise?

Cycling allows me to enjoy being outdoors at the same time I'm getting a workout.

Previous      (This is the last Question on this Survey !)      Next

Previous

Once the Survey window appears, type or click on the answers on each page. You can advance through the survey by clicking the “Next” button at right or go back by clicking the “Previous” button at left.

Next

Caution: By hitting Next on the final survey page, which is labeled at bottom, the survey answers are recorded and the survey window closes. If you want to go back and change answers, don’t click Next on the last page until you’re satisfied with all the answers.

## Secondary Case Entry



If you’re in the middle of a letter or memo, or working on another portion of a case that you can’t finish quickly, the Secondary Case Entry feature will allow you to enter another case without closing the current one.

Clicking the Secondary Case Entry button on the Case Entry tool bar will open up a complete additional Case Entry session. Some of the background color in the secondary session will be green, so that you can tell it apart from your original session. Any other windows that you open from the secondary session will also have some portion in green, so you can keep things straight.

Warranty

Full Case Customer Product/Issue Memo Letter Enclosure Notice Image User Page Quick Case

Case Number: Advisor: DEMO Input Date: 08/01/2000 MODE: ADD

Method: LTR Case Status: O Country: USA Quantity: 1

Reason for Call: CMPLT Date Occurred: 08/01/2000

Verbatim:

RBC Spelling

**NEWTON CIA**™

Last Case: 0

Once you’ve saved the new case, you can close the secondary session just like you would a normal one. Or, you can leave it open until you are finished with Newton CIA altogether, if you like.

## Print Case Detail



The Print Case Detail button on the tool bar will generate a listing of all of the details in the current case and send it to your printer. It will only show details that you have already saved for the case; any changes you have made will not show up until you have saved them. This feature also works from Display Case.

# CHAPTER 4: THE CIA NOTIFICATION CENTER

To help you organize your work and communicate with other Newton CIA users, your administrator, or other company officials, Newton CIA has the Notification Center. It provides quick, convenient information about case status and follow-up work. It also includes email for private messages and a bulletin board for mass announcements.

When first starting Newton CIA, you can go to the Notification Center by clicking the “Continue Log On” button.



To open the Notification Center from Case Entry, click on the “CIA Notification Center” button (with the octagon icon) at center on the function bar.

In this chapter you’ll learn about the four areas within the Notification Center: User Calendar, CIA Internal Email, User Open Cases, and the CIA News Room.

Above these four tabs, a menu bar and function bar remain active at all times in the CIA Notification Center. Both have commands that let you exit the Center and configure your printer. All four tabs have Print buttons that let you print the information you find on screen.

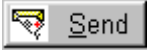
## CIA Internal Email

The CIA Internal Email Window is divided into an Email Selection Window on the left and an Email Text Window on the right. Though it looks a bit different, it is basically the same as the email feature from within Case Entry. The Email Selection Window records what messages have been received, from whom and when.



To read a message, click on it, and the message will appear in the Email Text Window at right.

Above the Email Text Window are buttons that let you send, delete or print email messages.



To send an email, click on the “Enter New Mail” button. This opens the Internal Email Processor used for writing and sending email, as described in Chapter 3.



To delete an email, select it on the left side of the window, and click on the “Delete Mail” button.



To print an email, select the mail item you want to print on the left side of the window, and click on the Print Mail button.

## User Calendar

The screenshot shows a software interface with a tabbed menu at the top: "Internal Email", "User Calendar" (selected), "User Open Cases", and "News Room". Below the tabs are buttons for "Save", "Delete", "Case", and "Print".

The main area is split into two panes. The left pane shows a monthly calendar for July 2000. The days of the week are labeled "Sun", "Mon", "Tues", "Wed", "Thur", "Fri", "Sat". The dates 10, 14, and 28 are highlighted in blue. Below the calendar is an "Add Followup Entry" button.

The right pane displays details for a follow-up entry:

- Auto Followup Code: (From Today)
- Followup Date: 08/27/2000
- Case Number: 502
- Priority: 5 = Medium
- Name: Mrs. Pam Watson
- Work Phone: (815) 555-2276
- Home Phone: 0
- Phone Tips: Call after lunch.
- Notes: Make sure replacement parts have arrived.

The User Calendar displays a monthly calendar that schedules follow-up work with customers. Dates highlighted in blue alert you to scheduled follow-ups on customer cases.

To review a follow-up note:

- 1) Click on the User Calendar tab within the Notification Center.
- 2) Scroll using the calendar month arrows to find the month you want.
- 4) Click on a date highlighted in blue. The name of the customer, his or her phone number, the case number and other notes will appear at right to help you follow up.

Above the Follow-up Information Window are buttons that let you update, delete or print the follow-up information, or retrieve the case.



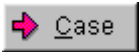
To change the follow-up date or contact information, type the new information into the appropriate fields, then click on the “Save” button at upper left. The blue highlight for that follow-up date will move to the new date after changing the month in the calendar window.



To delete the follow-up information, click on the “Delete” button at center left.



To print the follow-up information, click on the “Print” button at right.



To retrieve the case mentioned in the Follow-up Information Window, click on the “Case” button at center right. Newton CIA will open Case Entry, with the desired case loaded.

If you want to add a new followup, click the “Add Followup Entry” button below the calendar. Note that the follow date starts as today’s date. You can either change it directly, or you can select a value in the Auto Followup Code field above, which will advance the date by the number of days, weeks or months you select. You will not be allowed to enter a followup for the current or a previous date. Then fill in the other details in the window on the right, and click on the “Save” button above.



## User Open Cases

Internal Email   User Calendar   <b>User Open Cases</b>   News Room									
Open Cases Sorted By Age									Sort By Priority
Occur Date	Entry Date	Last Name	Case Number	Days Old	Status	Reason	Followup Date	Priority	
04/17/1999	04/19/1999	Hill		2	731	O	CMPLT		1
04/23/1999	04/28/1999	Parker		3	725	O	CMPLT		1
05/08/1999	05/12/1999	Wilson		4	710	O	CMPLT	09/02/2000	1
05/10/1999	05/14/1999	Barty		5	708	O	CMPLT		1
05/11/1999	05/14/1999	Minton		6	707	O	CMPLT	08/07/2000	1
06/01/1999	06/05/1999	Collins		7	686	O	CMPLT		1
06/20/1999	06/25/1999	Phillips		9	667	O	CMPLT		2
07/03/1999	07/05/1999	Bassett		10	654	O	CMPLT	10/02/2000	1
07/08/1999	07/09/1999	Rawe		11	649	O	CMPLT		1
07/14/1999	07/17/1999	Kaye		12	643	O	CMPLT		1
07/21/1999	07/23/1999	Jamison		13	636	O	CMPLT		1
08/02/1999	08/05/1999	Petracco		15	624	O	CMPLT	12/01/2000	1
08/07/1999	08/09/1999	Lorry		16	619	O	CMPLT		1
08/13/1999	08/17/1999	James		17	613	O	CMPLT		1
08/22/1999	08/24/1999	Culp		18	604	O	CMPLT		1
08/27/1999	08/28/1999	Miller		19	599	O	CMPLT		1

(Double Click on Row to Retrieve Case)

This window displays all open cases for your user ID, sorted to show the oldest cases at the top. It has an alternate view that sorts by case priority.

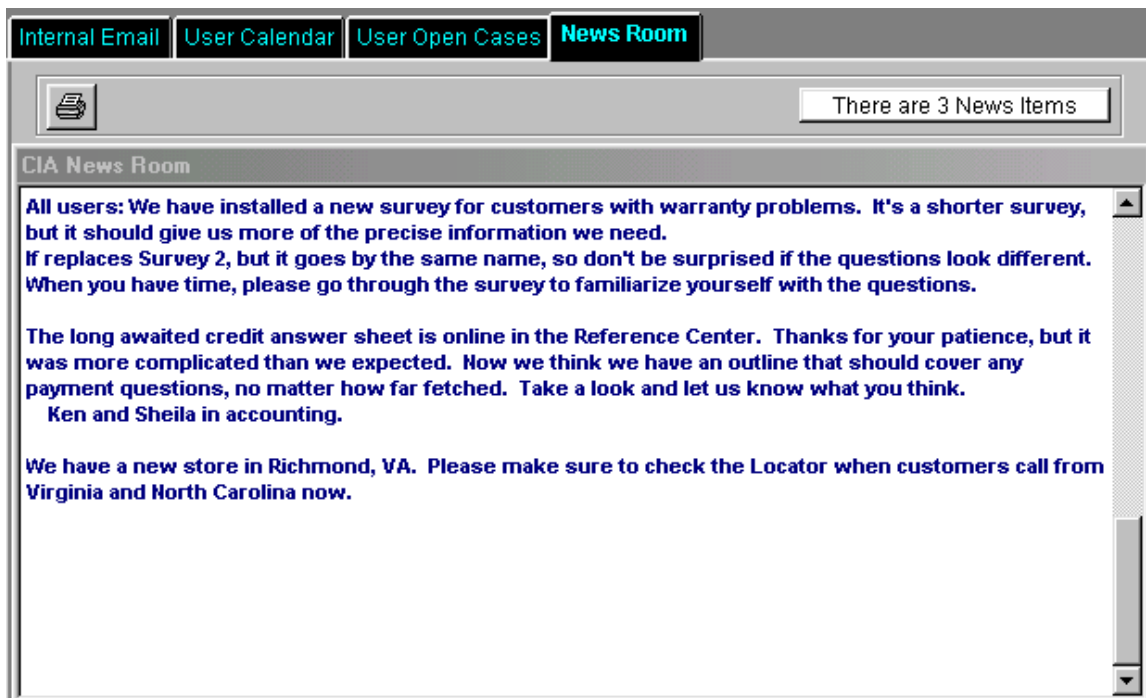
Click on the Open User Cases tab within the Notification Center. For each open and pending case, the window displays the occurred date, the entry (or input) date, the customer's last name, the case number, its age in days, status, reason for contact, the next followup date (if any) and the case priority.



The button in the upper left corner will let you print the list of open cases. The one in the upper right lets you switch between views.

Tip: Double clicking on a case will call up the Case Entry window with the selected case loaded.

## The CIA News Room



This window displays company-wide announcements (called news items) posted by the Newton CIA administrator.

At top right, it also gives notice of how many news items have been posted. To review multiple items, use the scroll bar.



To print news items, click on the Print button at upper left.

# CHAPTER 5: REPORTING

One of the most powerful and flexible tools that Newton CIA features is the reporting function. You can generate reports to analyze numerous aspects of your company's consumer affairs operations, and find the clues to improving them. Whether it involves tracking down complaints about a particular product, tracing when cases started over different periods of time, or narrowing down the locations where problems arise, Newton CIA can help you spot the patterns in even the biggest and most complicated collections of data.

In this chapter you'll learn how to focus reports using "search parameters," how to use parameter entry windows, how to select the type of report you want, and how to generate reports.

## Opening Reports



Newton CIA allows some users to have access to the Reports function, while excluding others. Your Newton CIA administrator will decide if you need access to Reports.

To open the Reports function, click "Reporting" on the menu bar of Case Entry, or you can use the "Reports Menu" button at center right on the function bar. Reports can also be available from Display Case. The Newton CIA Report Selection Window will appear.

## Search Parameters

All reports focus on at least one thing, whether it's a period of time or a particular location. Whatever it is, that becomes the primary "search parameter" for the report. Newton CIA will scan all cases on file to find those that match the parameter. For example, if the parameter is a specific problem, the report will compile a list of every case with that problem and summarize the findings.

Sometimes, reports need to be much more focused. To help narrow reports, Newton CIA can use parameters in combination. So if you want to look for cases about that best-selling item that were reported by fax during August, Newton CIA can give you the answer you want. It's designed to be as flexible as you need it to be.

From Date (mm/dd/yyyy):	07/01/1999	To:	07/31/1999
For Case Status:	<input type="checkbox"/> <input type="checkbox"/>		
Case Number From:	1	To:	1000
For Product:	B4220	To:	B5099
For Issue:	ABUSE	To:	DEFCT
For Location:	CT025	To:	CT025
For Advisor:	SAM	To:	SAM
For Zip Code:	25000	To:	32250
For Method:	CALL	To:	WLKIN
For Reason for Call:	CMPLT	To:	COMPL
For City:			CMPLT Compliment
For State:	<input type="checkbox"/>		COMPL Complaint
			INFOR Informational

Several parameters are available, including date, case status, case number, product, issue, location, user, city, state, zip code, method of contact, reason for contact, quick case, enclosures, even verbatim comments.

Naturally, this depends on the search parameters your company has chosen to set up, but it also depends on the type of report. The full range of parameters is available only on certain types of reports. Others don't use as wide a range of parameters because they're designed to focus on specific things. Their parameters are built in, so to speak.

When you want to compile a report, decide what kind of search you want to conduct and choose the type of report accordingly.

## Using Search Parameters

In Newton CIA, most search parameters are set up as a “from-to” statement. That means the search runs from one point and ends at another point.

It looks like this:



From Date (mm/dd/yyyy): 07/01/1999 To: 07/31/1999

To define a search, type in the starting point in the “from” field and type in the ending point in the “to” field. Some fields use drop-down menus to help select the range of the search. In the example above, the search will only look for cases filed during the month of July 1999.

The same parameter can be entered in both fields. That limits the search to one point – in this case a single day. In the above example, the user could restrict the search to July 1, 1999 by typing that into the “to” field.

When a pair of parameter fields is left blank, it doesn’t set any restrictions on a search, so a report will include all cases with regard to that parameter. If the “to” field were left blank in the example above, the search would cover all cases starting from July 1, 1999.

Some parameters aren’t set up in the “from-to” format and just consist of a single box, such as case status, city and state. These fields restrict the search to a single point, so they only need one field. By leaving them blank, the report will not restrict the search within any of those parameters.



For Case Status:

Tip: A “from-to” statement that requests numeric values (like a date or zip code) needs to be entered with the lowest value in the “from” field, and the highest one in the “to” field.

If the “from-to” statement needs an alphabetical value, remember that the “from-to” range must be in alphabetic order (ex. for an Issue “from-to” range, the value of “ABUSE” as the “from”, and “DEFCT” as the “to” value would work. Using “DEFCT” as the “from” and “ABUSE” as the “to” would not, resulting in a report with either no data selected, or wrong data selected).

## Selecting the Type of Report

Newton CIA offers a variety of standard reports. Each uses a different range of parameters, according to the best way of identifying common problems. Pick the type of report carefully, because it will determine the search parameters you will use.

To choose the type of report you want, click on “Reports” at left in the menu bar of the Report Selection Window, then select the choice from the drop-down list directly underneath. When you select a type of report, the appropriate parameter fields will appear in the Report Information Entry Window

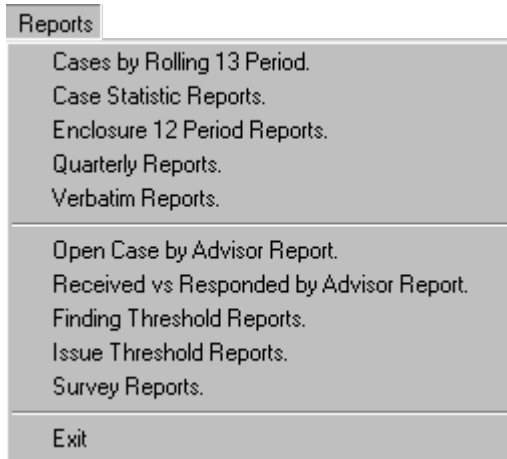
The reports include:

1) Rolling 13 period:

This is a report of cases during each of the most recent 13 of your company’s fiscal periods (often calendar months), so it’s used for identifying patterns over the past year. This report will identify problems according to product, issue or location and most other parameters. A recap window summarizes the results at bottom.

2) Case Statistic Report:

This lets you compile the list of cases handled by a particular agent for different periods of time. It can analyze the most recent 7-day period, 5-week period or 12-month period. It uses no other parameters.



3) Enclosures 12 period:

This is a 12-month report on enclosures and their costs. It can generate a summary of all costs for all enclosures, broken down by enclosure, time period, reason for contact, and advisor. It uses no other parameters.

4) Quarterly Reports:

This report analyzes problems chiefly according to product and issue for all four quarters of the year. The report uses most parameters. It summarizes the findings in a recap window at bottom.

5) Verbatim Reports:

This lists the opening verbatim comments of cases primarily according to product, issue and dealer location. It can be limited to search Quick Cases. The report uses most parameters.

6) Open Case by Advisor:

These reports list data on open cases according to advisor. They can be narrowed or broadened according to time period, method, reason for contact and priority. The two versions available sort cases by age or by case priority.

7) Occurred to Input Date Lapse Report:

This report shows how much time passed between when the customer says the problem occurred, and when they reported it to your company (and it was input to Newton CIA. It lists cases by advisor, then breaks them down further according to type of issue, method of contact and timeliness of response. The report can be narrowed or broadened according to time period, method and reason for contact.

8) Finding Threshold Reports:

These reports check the number of each type of finding code accumulated for each product code or lot number, throughout the entire case history. If the number of finding codes passes a pre-set limit, the report will set an alert, meaning that special attention may be required for that product or lot number. The reports come in both summary and detail versions. They use no parameters.

9) Issue Threshold Reports:

These reports check the number of each type of issue code accumulated for each product code or lot number, throughout the entire case history. If the number of issue codes passes a pre-set limit, the report will set an alert, meaning that special attention may be required for that product or lot number. The reports come in both summary and detail versions. They use no parameters.

10) Survey Reports:

The Survey reports allow you to select a survey code, for which they will tabulate the total results of multiple choice questions in one report, and to list all the free form answers in another. Most parameters are available.

## More Report Options

When you choose a report in the Report Selection Window, the report window will appear below. For most reports, it will be divided into upper and lower parts. Most parameter fields will appear in the lower part. But in the upper part, you'll need to click on one of several toggle options for formatting the report. This doesn't apply to reports organized according to user.

<input checked="" type="radio"/> By Product/Issue.	<input type="radio"/> Quick Case By Product/Issue.
<input type="radio"/> By Issue/Product.	<input type="radio"/> Quick Case By Issue/Product.
<input type="radio"/> By Location/Product.	<input type="radio"/> Quick Case By Location/Product.
<input type="radio"/> By Location/Issue.	<input type="radio"/> Quick Case By Location/Issue.

While most formats are self-explanatory, these special report options are not. They include item/issue, issue/item, location/item, and location/issue.

These options generate reports designed to focus on specific products and problems. To narrow the search further, you can organize the report by locations, or look at quick cases.

"Product/Issue" groups cases by product, then lists each case underneath, sub-grouping these by the issues involved.

"Issue/Product" groups cases by issue, then lists each case underneath, sub-grouping by the products involved.



“Location/Product” groups cases by location, then lists each case underneath, sub-grouping by products.

“Location/Issue” groups cases by location, then lists each case underneath, sub-grouping by issue.

## Generating Reports

To compile the report, click the “Generate Report” button at lower right.



Depending on the number of cases your company has entered into Newton CIA, and the speed of the network and computer running the software, there may be some delay in generating the report.

Use the scroll bars at right and bottom of large reports to view off-screen parts of the report.



Once a report is generated, you can print it by clicking on the Print button at left on the function bar.



To configure your printer, click on the Print Setup button at left on the function bar.