

## Lahey Customer Service

Lahey Customer Service delivers comprehensive contact management for current or prospective company, customer, and vendor records. It allows an unlimited number of contact records per company and an unlimited number of transaction events per contact. All transactions are updated in real time for up-to-the-minute on-screen access.

#### Features of Customer Service

- · Maintains an unlimited number of contact records per company
- · Tracks an unlimited number of events per contact record
- Provides user-defined call types
- Features remote synchronization of Customer Service data files
- Supports an unlimited number of call types
- Provides mail merge capabilities with prospect, customer, and vendor records
- Automatically generates company ID numbers in a user-defined format
- Supports user-defined screen labels for key terminology
- Provides SIC and company size fields for effective prospect profiling
- Provides nine user-definable information fields
- Allows eight phone numbers per contact record
- Tracks subject thread number for easy management of multiple contact events
- · Maintains a personal memo field for each contact record
- Automatically calculates call durations
- Provides an unlimited memo field for each transaction event
- Sales Orders can be entered from a contact record with a single mouse when linked to SBT Sales Orders
- Purchase Orders can be entered from a contact record with a single mouse when linked to SBT Purchase Orders
- Maintains a contact's alternate address, birthday, and anniversary
- · Allows an unlimited user-defined search capability
- Supports a separate company database from customers and vendors
- Imports customer records and creates company and contact records
- · Imports vendor records and creates company and contact records
- Imports from external file formats
- Sends and automatically logs MAPI-compliant e-mail messages
- Allows user-defined fields to be validated by system rule tables

### **Pro Series Integration**

- Allows sales orders to be entered from within Lahey Customer Service
- Provides for a company to be indentified with a customer number from SBT Accounts Receivable or SBT Sales Orders for real-time inquiries and look-up
- Allows purchase orders to be entered from within Lahey Customer Service
- Provides for a company to be indentified with a vendor number from SBT Accounts Payable or SBT Purchase Orders for real-time inquiries and look-up

# **SBT**

## Lahey Customer Service

### **Standard Reports**

Each report may be customized from a matrix of user-selected options, displayed, printed, exported to a spreadsheet, or saved on disk. Some of the included reports are:

- Activity Report by Company
- Activity Report by Event Date
- Activity Report by Event Type
- Activity Report by User ID
- Individual User To-Do Lists
- Contact Report by Company
- Contact Report by Event Date
- Contact Report by Event Type
- Contact Report by User ID
- Prospect Company Listing