

# Personal Contact Manager Plus (PCM Plus) Version 1.0 Manual

Windows 95/98/Me/2k/XP  
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## Introduction

PCM Plus is a customer relationship management (CRM) software application designed to be simple, reliable and cost effective. There are many contact managers and CRM software programs available. These range from the free contact manager programs (which many times lack the power and feature set that most professionals and small businesses require) to the CRM geared toward large corporations (which are very costly and require extensive training to use effectively).

The purpose of PCM Plus is to fill the gap between a contact manager and the high end CRM databases. PCM Plus is designed to meet the individual's and/or small business' need. PCM Plus brings low cost, feature-rich, portability and ease of use into one powerful CRM.

## Features

- Manage prospects, contacts and accounts.
- Drive sales, revenue and service and improve employee productivity.
- Easily export/import data to/from tab-delimited files for Microsoft Excel and other spreadsheet applications.
- Mail Merge compatibility with popular office applications.
- Self-contained...no registry entry and all files in a single directory tree.
- Portable...simply copy your databases to any licensed computer.
- Record time implementation/deployment.
- Simple to use...minimal training for the novice and expert alike.
- Email customer with ease.
- Go to customer's website in one-click.
- One-click callback list.
- Backup data with one-click.
- Track calls with easy to read tab-delimited log files.
- Track customized call results.
- Sort database by company or contact name.
- Query on any or all fields.
- Multiple database support.
- Move a record from/to any database.
- Common features accessible with mouse and keyboard; great for the visually impaired.
- Three custom fields to organize information specific to your needs.
- One-click copy: Copy part of or the entire record to the Windows clipboard.
- Automatically dial – even use a calling card.

## Getting Started

### System Requirements

The minimum system requirements for PCM Plus are:

- Pentium III (or compatible) computer
- 400+ MHz processor
- 128 MB RAM
- 100 MB of free disk space
- Windows 98 Second Edition

The recommended system requirements for PCM Plus are:

- Pentium 4 (or AMD Athlon 1 GHz (or faster) processor
- 256 MB (or more) RAM
- 40+ GB hard drive
- Windows compatible modem
- Win XP Home or Pro

## Installation

Run the pcmplus10.exe file and follow the on-screen instructions. This will create a folder on your hard drive called *c:\Program Files\pcmplus\*, and will install the program to that location. You will also have the opportunity to create a desktop icon and add PCM Plus to your Start menu.

Installing PCM Plus is straightforward and easy for the novice to accomplish. If you've installed any Windows programs before, PCM Plus is a piece of cake.

## Configuration

When you launch PCM Plus for the first time, you must configure the program for optimal performance. The settings window appears, giving you the opportunity to setup the following features:

### Settings

- COM Port:** For automatic dialing, choose the COM Port your modem is on. The default is COM Port 1. If you're not sure which COM Port your modem is on, you can go to the Control Panel/Modems in Windows and choose Properties. The COM Port value will be displayed.
- LD Prefix:** Enter the long distance prefix for automatic dialing. The prefix should be 1 to dial long distance in most areas. Use *9,1* as your prefix if an outside line is required before dialing begins.
- Log Calls?:** PCM Plus is robust in the tracking of logged calls. You have four options to suit everyone's needs. **None** is the default option and will not log any calls, in effect, disabling the logging feature of PCM Plus. If you'd like all calls logged, **All** provides the most detailed logging. Select **Prompt** if you'd like to be prompted when using the **Dial** activity button of PCM Plus. This allows you to manually decide which calls are logged while using PCM Plus. The **LD Only** option will log only long distance calls. This is useful for someone who doesn't want to track all calls; just those that are long distance.
- Result 1-5:** The **Stats** capability is fantastic for tracking results of your phone calls on a customizable basis. Track whether the calls resulted in unavailable, number was busy, a sales pitch was made, etc. The Stats are customizable, the possibilities are endless... YOU decide!! These settings are custom result fields for the **Stats** feature. (See the **Stats** activity button for more information) If Result 1 is filled out than the **Stats** feature is enabled. If the result fields are blank, **Stats** is disabled.
- Log Path:** If the Log Calls? feature of PCM Plus is set to All, LD Only or Prompt, you have the flexibility to decide where the log files are stored. Please type the path to the folder where PCM Plus will write your logs. *C:\Program Files\pcmplus\logs\* is the default.
- Delay:** PCM Plus is designed to anticipate fast-paced, high-call volume. The program dials the phone number, gives you time to pick up the phone and hands the call off to you by transferring the call from the computer to you.

The delay in PCM Plus determines how long you'd like the computer to wait before letting you take over the phone call. This number is designated in seconds. We've found that 5 seconds is the optimal number for most people. To manually tell PCM Plus when to hand off the call, enter 0 in the Delay field and you'll be required to strike a key on the keyboard before control is transferred.

- Custom 1-3:** Need a customized field that isn't displayed in the Add/Edit screen? Gotcha covered! Three custom fields in the Add/Edit screen enable you to customize PCM Plus to more accurately fit your usage. Examples of fields: Owner, Customer Class, Account Number, another address, another contact, active/inactive, customer/prospect, territory, time zone...Stop! We're quite confident you'll find great use of the custom fields in PCM Plus. Note: These fields are defaulted to Custom1, Custom2, Custom3 but can be changed to whatever you'd like.
- Provider:** Please use this field to designate the toll free number of your calling card or the dial-in number of your unlimited long distance calling plan. Type the access number (usually a toll free number) of your calling card or unlimited long distance provider. Example: 800-555-1212
- LD Pin:** Please type the pin number of your calling card if using a provider or password (if required) for your long distance service. **I don't think you have to be in prompt mode to use a provider. LD is determined by number of digits in the phone number. If using a ld provider and you also want to not use that provider, then, I think, you need to be in prompt mode not otherwise.**
- LD Prompt:** If using a provider, need to be in prompt mode. Check the box if using a provider.
- Backup Path:** Any computer expert worth their weight in gold will make sure you have your data backed up. PCM Plus makes this easy without a technical professional on board. With our one-touch backup choice, it's easy to backup without even realizing it's happening. The PCM Plus designers give you the opportunity to decide where your backup files reside. Type the path to the folder where PCM Plus will place your backup. *C:\Program Files\pcmplus\backup\* is the default.

## Using PCM Plus

Now that PCM Plus is installed and configured, be prepared for a unique and refreshing CRM experience.

### Main Window Overview

The following panes are displayed in the main window of PCM Plus.

**Title Bar:** This displays the database currently open as well as the version number of PCM Plus. The title bar will change when a new database is loaded.

**Customer Record List Box:** This is the heart of the PCM Plus program. It is a standard Windows list box, alphabetically sorted. Using the **Sort** button (see below) the data can be displayed by company name or contact name. The Sort feature is database specific, saved with each database.

**CONSIDER THIS...** IF you have a database called family and friends, you can have this database sorted by first and last name. Your customers' database for business can be sorted by company name. When you change to each database, your sort preference will be retained.

The customer record list box displays your data in one of two modes: All or Callback. (See the **All** or **Callback** button for more details.) Each customer record in the list box displays the company name, contact name, phone number and callback date, if one has been set. Use the mouse or arrow keys to highlight or phonetically type to quickly scroll down to the desired customer record. All activity buttons relate to the highlighted customer record.

**Notes preview pane:** As you scroll through your list of customer records in the customer record list box, the notes preview pane will display the notes relating to the highlighted customer record. This gives quick access to notes without manually opening each record. Please note, this preview pane is read-only. A vertical scroll bar will appear if the notes become larger than the notes preview pane.

**CONSIDER THIS...** View the notes preview pane when deciding who to call next. It plays a great role in prioritizing customer service. Remember to glance at the **Email** and **Website** buttons to see if you have gleaned this vital information from your customers. If they're grayed out, you have yet to obtain the info.

**Activity Buttons:** These buttons allow essential features of PCM Plus to be performed. Button functionality ranges from adding and editing customer records to viewing callbacks and querying the database. (See Using the Activity Buttons section below for information on each activity button.)

**Status Line:** This displays information about the number of customer records in the list box. It details what number you're on out of the total accessible records. It also tells you the mode you're in and whether a query is set or not. For example, 1 of 45 – All - Query.

## Using the Activity Buttons

The activity buttons most commonly used are displayed on the top row. The second row of buttons includes the mode buttons and quick contact buttons. The bottom row of buttons is seldom used. These functions perform data manipulation and capabilities for changing settings. As you look at the Activity Buttons, those grayed out denote the state of PCM Plus.

### Edit(Click the Mouse)(Enter)(Alt-E) – Your choice!

This is the default button when PCM Plus is opened. By choosing **Edit** from the main window, you are placed in the Add/Edit screen. You can edit any field (See the **Add** button below for detailed field information) or choose one of the following activity buttons at the bottom of the Add/Edit window:

**Save:** After editing is complete, choose **Save** to keep your changes and return to the main window of PCM Plus. Always Save, Always Save! Hmmm, have we saved this manual lately?

**Copy:** This will insert a copy of the entire customer record in your Windows clipboard. A "Record Successfully Copied" window will be displayed, dismissed by clicking the **OK** button. The data is now ready to be pasted into any Windows program that accepts the standard Windows edit commands – cut, copy, paste.

*CONSIDER THIS...* The copy feature is essential for follow up tasks. Copy and paste any customer record into an email and send it to your office admin who will read your notes and perform the follow up specified. Or for an extra reminder, email a customer record to yourself as something to take care of first thing in the morning. Your boss wants to see your notes on a specific client? Choose copy, open a new email message, choose paste and then send. What could be easier data manipulation? Can you say, "Easy as pie?"

**Email:** This will email the customer you are editing if one or both email fields have a valid email address. The **email** button will be grayed out if no email address is entered. A window will display instructing you to choose an email address. Choose the desired email address then press **Email**. Your default Windows email client will launch. Or, choose **Cancel** to return to the Add/Edit window.

*CONSIDER THIS...* It saves money and time to email specials and information to your customers. Be diligent in collecting this info!

**Website:** This will launch your default Windows web browser and point you to the customer's website. If the web field is blank, the **Website** button will be grayed out.

**Cancel:** This will discard any changes you've made and return to the main window.

#### Add (Alt-A)

Choose **Add** to create a new customer record. All fields are ASCII text fields. Remember, consistency is key for querying the database. The following fields (Name [type, length]) are available:

**First (Edit Box, 32):** Enter the first name of your primary contact. A single name in this field works best for mail merge. Please enter additional contacts with descriptive notes in the notes field.

**Last (Edit Box, 32):** Enter the last name of your primary contact. A single name in this field works best for mail merge. Again, enter additional contacts in the notes field.

**Phone (Edit Box, 24):** Enter the main phone number for the customer. The phone number can be entered in any format. Example: (801) 885-3002 – call us anytime...we're here to help. If you have an extension for your contact, you can add it after the phone number. Example: (801) 885-3002 x 1000. PCM Plus will dial the phone number for you then prompt you to dial the extension or skip dialing the extension. Choose **OK** to dial the extension or **Cancel** to skip. The contact record will then come up with your cursor in the notes field.

**Fax (Edit Box, 24):** Enter the fax number for the customer. Fax number can be entered in any format.

**Mobile (Edit Box, 24):** Enter the mobile number for the customer. The mobile number can be entered in any format.

**Home (Edit Box, 24):** Type the home phone number for the customer. The home number can be entered in any format.

**Custom 1 (Edit Box, 24):** Remember, custom fields are defined by choosing the **Settings** activity button from the main window of PCM Plus. (See the Configuration section above for more information.)

**Callback (Edit Box, 8):** This is one of the main features of PCM Plus. Callback dates must be entered in the specific format of MM/DD/YY. If the date is not entered in this format, the callback will not be set properly and thus will not display when the callback activity button is chosen. After making your callback, simply delete the date in the callback field or set a new callback date. (Please see Callback under Activity Buttons for more details.)

**Company (Edit Box, 64):** Type the company name of the customer record. Remember to make your data on the shorter side as problems pop up when using labels in mail merge.

**Address 1 (Edit Box, 64):** Enter line 1 of the company address. Or, if the customer has a PO Box and a street address, use address 1 for one or the other but be consistent.

**Address 2 (Edit Box, 64):** Enter line 2 of the company address. Or, if the customer has a PO Box and a street address, use address 2 for one or the other but be consistent.

**City (Edit Box, 24):** Type the city name.

**State (Edit Box, 4):** Enter the State. This field only supports the state abbreviation.

**Zip/Postal Code (Edit Box, 12):** Type the Zip code or Postal code.

**Country (Combo box, n/a):** Select the country from the drop down list. If no country is selected, United States will be the default.

**Email (Edit Box, 64):** Email has two fields available as many people have multiple email addresses. If no email address is entered, the **email** activity button will not be active.

**Web (Edit Box, 64):** Enter the customer website. If no website is entered, the **website** activity button will not be active.

**Rep (Edit Box, 24):** Enter the rep name. Leave this blank if your business does not use field reps.

**Custom 2 (Edit Box, 64):** Custom fields are defined by choosing the **Settings** activity button from the main window of PCM Plus. (See the Configuration section above for more information.)

**Revised (Read-Only Edit Box, 8):** The text in this field is an FYI. Whenever changes are made to the record and the record is saved, the revised date will be updated.

**Custom 3 (Edit Box, 64):** Custom fields are defined by choosing the **Settings** activity button from the main window of PCM Plus. (See the Configuration section above for more information.)

**Last Call (Read-Only Edit Box, 8):** This date field is an FYI. It displays the date that PCM Plus last dialed the customer. If the dial feature is not used (**Dial** Activity Button, Alt-I), this field will remain blank.

**\*\*Notes (Rich Edit Box, 4096):** The **Notes** field contains miscellaneous information about your customers. PCM Plus holds 4kb of notes per customer record. When the notes are 90% full, a warning will instruct you to delete unnecessary notes. If you go over the limit, you will be forced to reduce your notes before saving the record. Keep in mind, 4kb of notes is about 50 lines of notes or one typed page. When you enter the Notes field, your cursor will be on a blank line. If you add your new note on this blank line, PCM Plus will automatically date this new note for you. If you arrow around in your notes and insert notes anywhere but the top blank line, PCM plus assumes you're modifying notes and does not date them. Remember to choose **Save** when complete!

### **Helpful Hints for Note Writing**

- It's always a good idea to take note of who you talked to specifically.
- Make a note every time you make a call, even if the note is simple or redundant. Specify if a number was busy or if Larry's helping a customer. This accomplishes two things: 1. If you mention a phone number is busy but you don't notate it every time you make the call, it could be busy six times and you may not realize it. If you notate it all six times, it will raise a flag in your mind that there may be something wrong with the number. 2. Notating every call also helps you find patterns with customers. If Steve "just stepped out" fifteen times in a row, maybe he's avoiding you?
- Be sure to mention in brief detail what your customers have ordered. This helps you quickly get up to speed with your customer, finding out how well specific

products have done, or giving you a tip of what they have not ordered because it's not in your notes.

- A little bit of personal information is helpful so your customers feel like you care about them. Remember, relationship is the key to sales.
- Too many notes complicate things and make it difficult to get caught up to speed. When asking how long the essay should be, an old English teacher once said, "Like a girl's skirt. Short enough to keep it interesting. Long enough to cover the subject." A happy medium will suffice.
- Go through your notes periodically to delete things that don't pertain to the current relationship. Knowing that Barbara had a baby three years ago isn't very helpful anymore. Notating that Tom stepped out fifteen times is great info if it's current. Two years ago though, is old news.

#### Delete (Alt-D)

When **Delete** is clicked you will be prompted with a "Confirm Delete" box. Choose **Yes** to delete the selected customer record or **No** to keep the record.

*CONSIDER THIS...*Delete completely removes the record. Use with caution!!

#### \*\*Dial (Alt-I)

The **Dial** button allows the computer modem to dial the phone for you. This feature is necessary for accurate and quick dialing and most importantly, to allow PCM Plus to log calls for you. Click **Dial** and you are prompted with "Choose Phone Number". All of the telephone fields are listed, allowing you to scroll to the number you want to dial. Choose **Dial** to call the phone number highlighted or **Cancel** to return to the main window of PCM Plus. Talk about prompts. Also mention Stats.

#### Stats (Alt-T)

The **Stats** feature is an incredible way to keep track of call results. The **Stats** window can be displayed manually from the main PCM window by pressing **Alt-T**, single clicking on the **Stats** button, or automatically when using the auto-dial feature of PCM Plus. (See **Dial** for more details) Five customizable results are available to track the call results you desire. The names you enter under **Settings** (See Configuration for details or Appendix C for PCM Plus .INI Information) will be displayed in your **Stats** window. (Stats is disabled if the result fields under Settings are blank. Only 1 result field needs be filled out to enable the Stats feature.) While in the Stats window, you can click on each result button to increment the associated counter by 1 or manually type a number in the edit box, if you prefer. The buttons listed below are available from the Stats window:

**Save:** Click **Save** after incrementing the call results.

**Clear:** Choose **Clear** to reset all result numbers to zero. On program startup, if the call results have not been cleared from the previous day, a message box will give you the opportunity to retain or reset your numbers.

**Copy:** Inserts the call results into the clipboard to be pasted into any Windows application. This is great if you need to transfer the results of today's work to a different application...email, spreadsheet, etc.

**Cancel:** Escape or **Cancel** will exit the Stats window and return to the main window of PCM Plus. None of your defined counters will be incremented. However, the unclassified counter will be incremented by one. This serves the purpose of tracking activity. If an employee consistently presses cancel, you know they're not keeping track of their calls.

Their customized statistics aren't incremented but the unclassified counter is. This can serve as a training tool, allowing team leaders to assist their employees in proper reporting.

*CONSIDER THIS...* Salesmen are often required to track their call results. The Stats feature can be used to track number of sales, companies out of business, sales pitches made, contact out of the office, etc. After calling a client you can manually go to the **Stats** window and click the result of that call (don't forget to choose **Save** to track the results of your hard work). If you're using the automatic dialer of PCM Plus, you're placed in the Stats window at the end of each call which is denoted by saving the customer record or choosing cancel. At the end of the day, **Copy** and paste your results into an email to send to your supervisor. Or, log your results in a word file or spreadsheet. Happy calling!

#### Exit (Alt-X or the Windows convention Alt-F4)

If you're done for the day or want to force a backup of your vital data, please choose **Exit**. This is just one great feature where PCM Plus really shines. Every time you exit the program, you're able to use the one-click backup feature. When prompted with "Backup Now?" accept the default of **Yes** to backup your data. Choose **No** only if you have a reason to do so. Choose **Cancel** to continue your current PCM Plus session. Please note, any queries in effect will be cleared upon exit. The mode of operation (All or Callback) will be retained from session to session.

#### Callback (Alt-K)

When you click the **Callback** button, only the records that meet your callback criteria will be displayed. The callback date field in each customer record is what determines if there's a callback set. A callback will appear in this list on the day you specify and every day thereafter until you clear the callback date or set a new date in the future. The Callback mode of PCM Plus can be used in conjunction with the Query feature. If you have a query set, only the records meeting your query criteria will be displayed. PCM Plus has real power because you can toggle back and forth between All and Callback, allowing you to see: 1. All records relating to your query or 2. Records that meet your query criteria as well as have a current callback set. See **Query** below for a complete explanation of the query capabilities.

*CONSIDER THIS...* There are 400 records in my database. I have 50 callbacks set in the entire database. 20 of those callbacks are today's date and earlier. I will see 20 records when I click **Callback**. The status line will say, "1 of 20 – callback".

*...AND THIS...* The callback button will be grayed out because you're in the callback mode. To see all the records in the database, simply click the **All** activity button.

#### All (Alt-L)

By default, all records in PCM Plus will be displayed in the main customer record list box. The status line shows the total number of records and denotes all mode. For example, 1 of 400 – all. When in Callback mode (See Callback Above) choose **All** to see your complete customer record list. When in a query of callbacks, choose **All** to view the complete query list. Remember, you must choose **Clear** to remove your query to see all records in the database. See **Query** below for a complete explanation of the query capabilities.

*CONSIDER THIS...* When in All mode, the **All** button will be grayed out because you're already in this mode.

### Query (Alt-Q)

Query is a powerful feature that delivers specific information you not only want but desperately need! You can query on any or all the fields in a database. When you click on query, a list box is displayed with all fields in the Add/Edit screen and below that, an edit box for the string, or the phrase you want to query for. After choosing the field to query on and the string to query for, choose **Query** at the bottom of the screen to run the query or **Cancel** to return to the main PCM window.

The **Query** button on the main PCM window remains available for subsequent searches without clearing after each query. You can also query the database on any field to see which records don't have a particular field filled out by leaving the string empty. See Q&A #3 below. If you have a query set you are only viewing the records that meet your query criteria. The intelligent query capabilities of PCM Plus also allow you to toggle between **Callback** and **All** while your query is still set. This allows you to query all records or restrict your query even further to just the callback list. See Q&A 1-5 below for specific query examples.

#### *Q&A #1...*

**Q:** I live in the Mountain Time Zone and it's 7AM. It's too early to call any customers except for those in the Eastern Time Zone. How can I use the Callback and Query features to get a list of valid customers?

**A:** Choose the **Query** activity button and select the State field. In the string edit box, type NY for New York. Click **Query** to begin your search. A list of all customers in New York will be displayed. Now, click the **Callback** activity button. The query will be narrowed even further to display the customers in New York that have a callback date set for today's date or earlier. You now have a list of customers with a good likelihood of catching in the office at 9AM Eastern Time. Quickly take a look at your status line. You will notice you have a query set and you're in callback mode.

*CONSIDER THIS...* PCM Plus does not have a Time Zone field but if you want to query regularly on a Time Zone (the above Q&A example is only one state in the Eastern Time Zone), *consider* making one of your custom fields a Time Zone field. See **Settings** above for more information.

#### *Q&A#2...*

**Q:** How can I get a list of customers whom I told I would call back today?

**A:** Simply choose **Query** and scroll to the Callback Field. Enter today's date in the string edit box and select **Query**. For example, type 06/15/05. You will now see a list of records with today's callback date or any date you specify. You may have 100 customers in the general callback feature but when querying on the callback field, you may have only 15 customers with today's callback date.

*CONSIDER THIS...* This query is useful when your calling time is limited. A callback query significantly increases the likelihood of reaching those whom you promised you'd call on a given day.

*...AND THIS...* Remember, the callback feature considers a callback any record with today's date or earlier. To see all records in the database, you must clear your query and have all displayed on your status line.

Q&A #3...

Q: I want to know which customers do not have a website address defined in the web field. How do I accomplish this?

A: Simple! Make sure All mode is set. (The **All** button should be grey or you can look on the status line.) Choose **Query**. Select the website field and leave the string blank. Choose **Query**. You will now see all customer records that do not have a website in the web field.

Q&A #4...

Q: Help...I just remembered I'm supposed to call back Jennifer today. The problem is, I can't remember the company she's with. This could mean a great sale. How do I find her?

A: While in All mode, select **Query**. Scroll down to the first name field. In the string edit box, type in Jennifer. Case sensitivity is not important. Now all records that have Jennifer as the first name will be displayed. Look at the status line and you'll see the results of your query. For example, it may read, "5 of 400 – query". Click on the **Callback** activity button. Look at your status line again. It may read, "2 of 400 – callback – query". Now instead of 400 contacts to consider, you have two of them. It should be very easy to determine the Jennifer you are looking for. Now, read the notes to get caught up, and make a sale!

Q&A #5...

Q: After running a query, why do I have zero results displayed, even though I think there are records matching my criteria?

A: If you query the database in All mode for a specific call back date in the future, you'll see those records. However, if you click the Callback activity button for callback mode with a query set, there will be no records displayed. Why? Because, you queried on a date in the future and the callback mode of PCM Plus considers a callback any record with today's date or earlier.

#### Clear

Choosing **Clear** will remove any query you may have set. This button is grayed out if you're not in a query.

#### Email (Alt-M) / Website (Alt-W)

From the main window of PCM Plus or while editing a customer record, with just a couple of clicks, you can email your customer or go to their website. When you click these buttons, your default email client or default Internet browser will be launched to accomplish either task. If more than one email address is defined, you will be given a list allowing you to choose which address you'd like to email. If there are no email addresses and/or website defined in the email and web fields, these buttons will be grayed out.

*CONSIDER THIS...*As you scroll from customer to customer in the main customer record list box you can quickly determine if you have their email address or website. The respective buttons will be grayed out if no data is in the field.

#### Change (Alt-C)

PCM Plus allows you to create multiple databases, categorizing your customer records to best suit your working style. When you click the **Change** activity button, you are presented with a standard windows open dialog box, defaulted to the location of your database files. "Choose a database" is the heading. Select the database you'd like to change to by picking from the list or typing the name of the database, then click **Open**. Your new database will be displayed. Look at the title bar to verify what database is loaded and the status line to gain information on how many records are in the database and what mode you're currently

in. Choose **Cancel** to abort the process. “No database selected, nothing done” will be displayed. Click **OK**. You will be returned to the main customer record list box of PCM Plus.

To create a new database, choose **Change**. Type in the name of a new database (files with the .tbk extension), select **Open** and PCM Plus prompts, “The database does not exist, do you want to create it?”. If you choose **No**, you will be returned to the “Open Database” window. Click **Yes** to create the database and load it into PCM Plus. You now have a new, empty database. Your status line will display 0 of 0 - All. You can add records by hand or use the **Import** activity button for mass data import capabilities.

*CONSIDER THIS...* Why would you have multiple databases to change to? Possible uses include a prospects database for prospective customers and a customer database. For part of a day you may want to work actual customers then **CHANGE** to your prospects database later in the day to work on prospects. PCM Plus is used for personal use as well. Many users have a family database; an electronic address book for sending Christmas cards, invitations and family letters. PCM Plus can be used for all kinds of data organization. Let us know how you use the program...

[comments@pcmplus.com](mailto:comments@pcmplus.com)

#### Move

One exciting feature of PCM Plus is the ability to move a customer record from one database to another. Why is this so handy?

*CONSIDER THIS...* Referring to the above example, once a prospect makes an order and becomes a customer, move that customer record from your prospects database to your customer database. Another use would be moving an active customer to an inactive customer database or vice versa. Whatever the case may be, Move is a powerful feature for data manipulation.

To move a customer record, choose **Move**. “Choose a Database” window will be displayed. Highlight the database you want to move your record to. Select **Open**. “Record moved successfully” will be displayed. Click **OK** to dismiss the prompt and return to the original database you moved records from. Choose **Cancel** to quit the move request.

#### Import

When clicking the **Import** activity button, you are in the import data screen. There is an edit box for the import file. This should be a tab-delimited .txt file which must have all fields in the proper order. Fields are separated by tabs and each record is on a row by itself. In other words, the number of lines in your file, minus the field headings (the first row) is how many records you intend to import. You can leave any field blank but must have a tab as a place marker and a heading for that field. Simply type in the path and file name of the import file. The next import box is the database your data will be imported to. This defaults to the currently open database. The next edit box is the delimiter. If you leave this field blank, the field delimiter is a tab. It is possible to use a different character in this field if the system you’re importing or exporting to requires it. Choose import or Cancel. Once importing is complete, a message box will be displayed showing successful records imported or if there was a problem, it will display errors. Take care to make sure the number of records imported match with the number of records in your file. See Appendix for a sample import file. 24 fields. The fields need to be listed in a specific order. See pcm directory for a sample import spreadsheet. Assistance with importing and exporting data is

available from the PCM Plus staff at \$50 per hour or on a project basis. A database has to be created before you can import. Make sure there are no blank lines in your text file. Be sure to format the Zip code column as Zip code so your leading zeros will be kept in place.

### Export

This is similar to the import screen with three fields and an export and cancel button. Export file is the tab delimited text file where you would like the exported data to be saved. The database is the database you want to export data from. The default is the currently open database. The field delimiter is a tab when left blank. Choose Export to export your data.

### Settings

See the Configuration section under getting started for detailed information about PCM Plus Settings.

### Sort (Alt-S)

Sort allows you to choose the way each database is sorted. A list box is displayed, allowing you to sort the database by last name/first name or company name. Highlight the sort preference then choose **OK** to accept or **Cancel**. The sort preference is saved with the database. For instance, a personal database may want to be sorted by last name/first name; a business database by company. The default is company.

## **Activity/Call Logs**

The activity/call logs reside in the default folder of *c:\Program Files\pcmplus\logs*. A log file is created for each day the program is used. You must use the **Dial** Activity Button for call logs to be created. If you're dialing manually (by hand), log files will not be created. Each log file will be named the year, month, and day with the .log extension. Example: 20040725.log is the log file for July 25, 2004. These are tab-delimited text files and can be viewed in any text editor or spreadsheet program (such as Microsoft Excel). For example, highlight a log file, right click, choose Open With and select Excel. The log will pull into Excel beautifully. The following information will be logged: First Name, Last Name, Company, Phone Number, Long Distance Y/N, Date Called, when the call began, when the call ended, and the custom result of the call that you specified in the status window.

NOTE: The status window feature must be enabled for stats to be logged. Please refer to the **Stats** activity button for more information.

This logging feature empowers your sales staff by tracking call volume, results, etc. The details of how and when these log entries will be created depend upon the choice you made in the setup screen when you configured PCM Plus. Please refer to **Configuration** for more information.

## **Backup/Restore**

The backup feature in PCM Plus is designed to never require a second thought on the part of a PCM Plus user. When you exit the program, you are prompted with the screen "Backup now, backup data before leaving?" Yes, No Cancel. If you say yes, data is backed up to the location you specified when you setup PCM Plus and exits the program. If you say no, the backup is not performed and you exit the program. Cancel returns you to the main list box of PCM Plus. The default is to backup all database files. The primary goal is to backup frequently, without requiring the user to do anything special to protect crucial data. The default folder for backups is *c:\Program Files\pcmplus\backup\*. Under the primary backup folder is a folder for each day of the week. The

backup will reside in its respective day. Therefore, if you work five days a week, you will have five backups that are replaced weekly on the given day. So, if today is Wednesday and you choose backup, your backup will be archived to *c:\Program Files\pcmplus\backup\Wednesday\*. The filename is the name of the *database.tbk*. Every time you exit the software, by default, all databases will be backed up. It is advisable to make a removable backup (on CD, flash drive, network, etc) of your backup folder from time to time. Backup your work for safety! We can never remind you enough – please backup your data!!!

Restore Details for Administrators: The default location for usable databases in PCM Plus is the main folder, *C:\Program Files\pcmplus*. If you want to restore a database, close PCM Plus and copy the database from your backup (in this case *c:\Program Files\pcmplus\backup\Wednesday\sample.tbk*) to the PCM Plus working folder, overwriting the database in the working location. The reason this is not recommended for the average user is because you wipe out your whole database when you do this. You are encouraged to copy your original, working database to a safe location before you restore. There is no restore feature or button in PCM Plus intentionally to prevent end users from overwriting their data.

## General Information

### Licensing, Registration and Updates

#### Licensing:

PCM Plus “License for Use and Distribution”

**PCM Plus** is distributed as try before you buy software.

**All** copyrights to PCM Plus are exclusively owned by End to End Technologies.

**Anyone** may use this software during a test period of 45 days. Following this test period of 45 days or less, you must register the software if you wish to continue using PCM Plus. Please see the Registration section below.

**There** are 2 ways to license PCM Plus:

1. A single computer usage license. The user purchases one license of PCM Plus on one computer.
2. A multiple usage license. The user purchases a number of usage licenses for use, by the purchaser, the purchaser's employees or accredited agents, on the same number of computers. The number of licenses in a network environment must not be less than the maximum possible amount of simultaneous users.

**Once** registered, the user is granted a non-exclusive license to use PCM Plus on as many computers as defined by the licensing terms above according to the number of licenses purchased, for any legal purpose. The registered PCM Plus software may be permanently transferred, in its entirety, if the person receiving it agrees to the terms of this license. If the software is an update, the transfer must include the update and all previous versions.

**The** PCM Plus unregistered trial version may be freely distributed, with exceptions noted below, provided the distribution package is not modified in any way.

1. No person or company may distribute separate parts of the package without written permission of End to End Technologies.
2. The PCM Plus unregistered trial version may not be distributed inside of any other software package without written permission of End to End Technologies.
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**PCM Plus** is distributed "as is". No warranty of any kind is expressed or implied. You use at your own risk. Neither the author nor the agents of the author will be liable for data loss, damages, loss of profits or any other kind of loss while using or misusing this software.

**There** are no additional license fees, apart from the annual or semi-annual registration, associated with the creation and distribution of PCM Plus.

**You** may not use, copy, emulate, clone, rent, lease, sell, modify, decompile, disassemble, otherwise reverse engineer, or transfer the licensed program, or any subset of the licensed program, except as provided for in this agreement. Any such unauthorized use shall result in immediate and automatic termination of this license and may result in criminal and/or civil prosecution.

**All** rights not expressly granted here are reserved by PCM Plus and End to End Technologies.

**Installing** and using PCM Plus signifies acceptance of these terms and conditions of the license.

**If** you do not agree with the terms of this license you must remove PCM Plus files from your storage devices and cease to use the product.

**Thank you for supporting PCM Plus!**

**Registration:**

PCM Plus is licensed semi-annually or annually, allowing you to always have the current software with no extra costs. You also receive email support as a standard feature of our software. This licensing model ensures ongoing PCM Plus development as well as reliable and inexpensive support. The cost for PCM Plus is \$5 per month per user, billed semi-annually or annually. A \$5 discount is given for an annual subscription. Please contact [sales@pcmplus.com](mailto:sales@pcmplus.com) for custom versions and site licenses of PCM Plus.

**Updates:**

Please check the PCM Plus website, [www.pcmplus.com](http://www.pcmplus.com) for updates to PCM Plus. Compare the version number above the status line in the main window where it states, "PCM Plus 1.0 Copyright 2004 End to End Technologies All Rights Reserved", with the latest version specified on the website. Please contact [support@pcmplus.com](mailto:support@pcmplus.com) and we'll help you with your update. If you have a semi-annual or annual subscription, updates are always free.

**Technical Support**

Tech support is available for all licensed users via email. [Support@pcmplus.com](mailto:Support@pcmplus.com). Tech support via phone is billed at \$50 per hour. Exceptions may be considered on a case by case basis. Call 801-885-3002. If using the program in demo mode, pre-sales tech support is available by emailing [sales@pcmplus.com](mailto:sales@pcmplus.com). Technical support relates to PCM Plus only. Refer to the documentation for other software products when having problems with their software or see network administrator for hardware difficulties.

## Appendix A: Frequently Asked Questions (FAQ)

**Q:** How large can a database be?

**A:** There is no limit to how large a database can be; only the limitations of the storage medium and your Operating System. However, when your database grows beyond 2000-3000 entries, the program slows down accordingly. The entire database is saved when you save one record. This sounds inefficient but is done on purpose to ensure data integrity. Consider splitting your data into multiple databases. For example: customer, prospects and inactive databases.

**Q:** Why is PCM Plus only available on a lease basis? Why can't I buy it outright?

**A:** There are several reasons we have selected a lease option as opposed to a purchase...

1. \$5.00 per month or less is very inexpensive, allowing anybody to afford PCM Plus. We feel you deserve the latest version of PCM Plus at all times, decreasing the complications of tech support on our end but more importantly, ensuring that you can take advantage of the latest features as they're available, not when you're conned into a more expensive upgrade fee for features you may not use.

*CONSIDER THIS...* If we sold the program for \$99.95, it would be equivalent to 20 months or more on the lease program. If you bought the software outright, you'd be required to come up with \$100 upfront and after 20 months you'd have an old piece of software that would require upgrades.

Let's say after the 20 months, we charge a \$39.95 upgrade fee. Now you've spent \$140.00. Now, compare that to our lease plan. 24 months under our annual lease plan is \$110.00. 4 months free, a \$30.00 savings, the latest version and tech support. It's a no-brainer.

2. Not sure if PCM Plus will work for you? Buy the 6 month subscription for \$30.00. Instead of paying \$99.95 for a piece of software you're not sure will meet your needs, you can try it out for a 6 month trial for only \$30.00 out of pocket. If the program works for you, continue with another subscription. If not (don't say that!!!), go on your merry way, happy you spent only \$30.00! We look forward to long term, mutually-beneficial business relationships.

**Appendix B: Import/Export Details**

## Appendix C: .INI Information

Following Windows standard conventions, the PCM Plus .ini file is the configuration file. The preferred way to make changes to this file is through the PCM Plus Configuration activity button. However, the details are spelled out in this appendix for experienced users who need to edit the .ini file by hand. All .ini files are simple text files that may be edited with a text editor such as Microsoft Windows Notepad. The lines in brackets are headings for each section. Each configurable item on the left has a corresponding value after the equal sign on the right. Please only make changes to the value after the =. Most importantly, make sure the file is saved as an ASCII text file. For descriptions of each line item, please consult the Configuration section of this manual under Getting Started. **Note: You must have PCM Plus closed when you edit this file or your changes may be overwritten.**

### Example INI File

```
[modem]
comport=1
ldprefix=1
ldprovider=
ldpin=
ldprompt=no
logcalls=yes
logpath=c:\Program Files\pcmplus\logs\
hangupdelay=5
[calls]
result1=Unavail
result2=Pitch
result3=Sale
result4=OOB
result5=
custom1=ACCT_NUM
custom2=C_CLASS
custom3=OWNER
[files]
backup path=c:\Program Files\pcmplus\backup\
database=C:\Program Files\pcmplus\customers.tbk
```