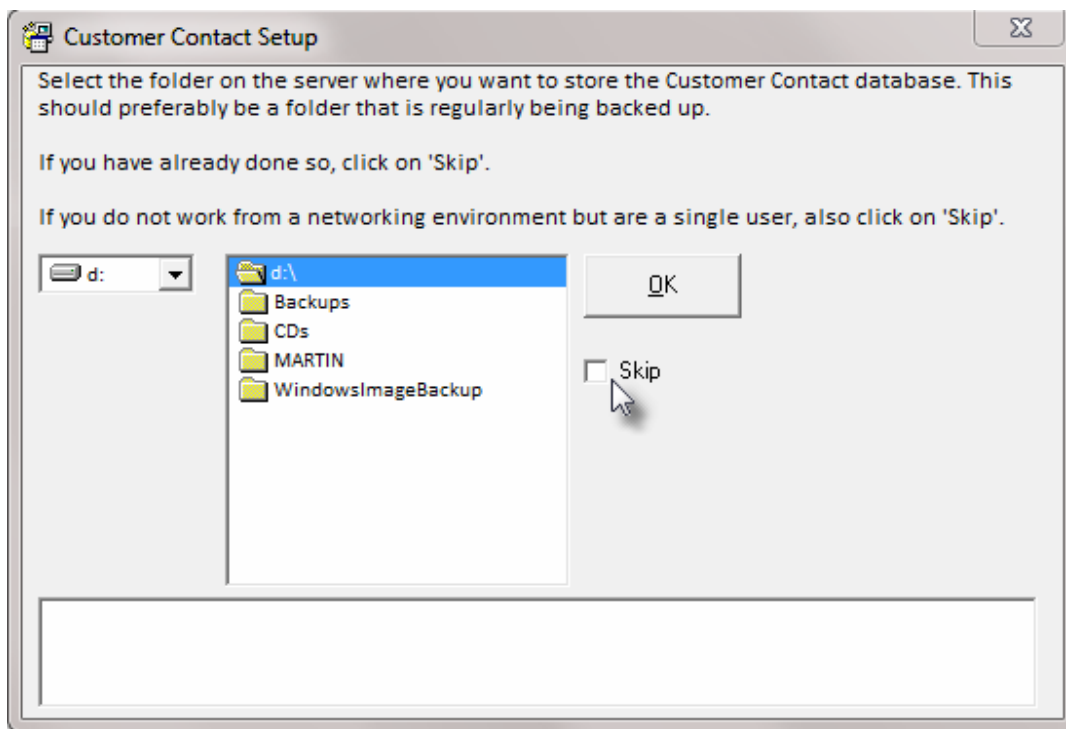


## 1. Installation

Unzip the file 'CONTACT.zip' and click on 'Setup.exe'. Once the program starts, click on 'Install Customer Contact'.



Install the database 'CONTACT.mdb' on the server. This should only be done ONCE. For subsequent installations, click on 'Skip'. If you do not work from network but use a stand-alone computer, also click on 'Skip'.

Start Customer Contact™ and enter all relevant information.



The image shows a 'Customer Contact Registration' dialog box. It contains a copyright notice for Dyntech CC, a disclaimer of liability, and an agreement section. Below the agreement, there are radio buttons for 'Disagree' and 'Agree', with 'Agree' selected. The registration form includes fields for 'Your Name' (Martin Poortvliet), 'Your Company' (Dyntech), 'Please enter your Product Key' (a 4-character key with options BBSHJ, KDBCX, AANUI, JSBNN), and 'Account Number' (Not Applicable). A 'Register' button is located at the bottom right.

Customer Contact Registration

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Dyntech shall, under no circumstances, be liable for any loss of business or profit, or any other direct, indirect or consequential damages or losses arising from the use of this product.

By using this program, you are agreeing to become bound by the terms of this agreement.

Dyntech grants the Licensee a non-exclusive right, without right to sub-license, to use this copy of Customer Contact. Dyntech reserves all rights not expressly granted, and retains title and ownership of this software.

☐ Disagree ☒ Agree

Your Name: Martin Poortvliet

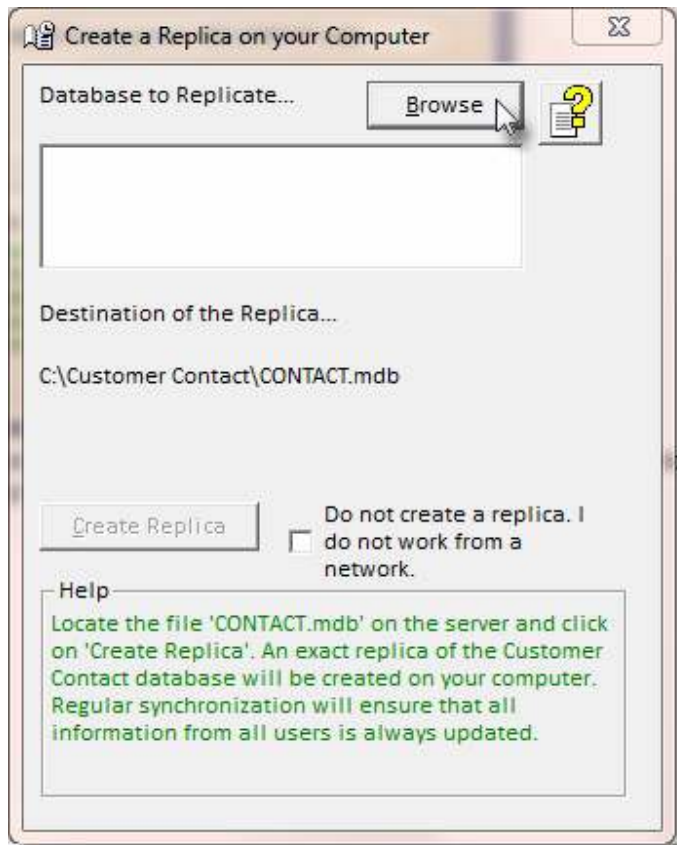
Your Company: Dyntech

Please enter your Product Key: BBSHJ KDBCX AANUI JSBNN

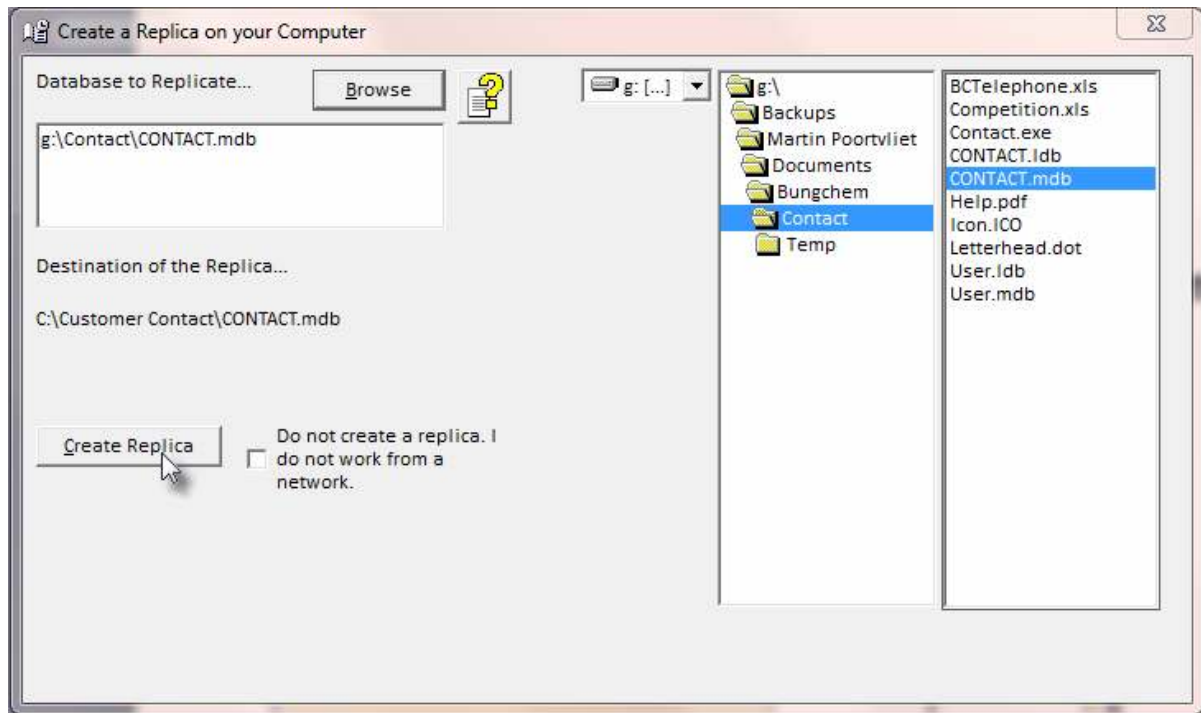
Account Number: Not Applicable

Register

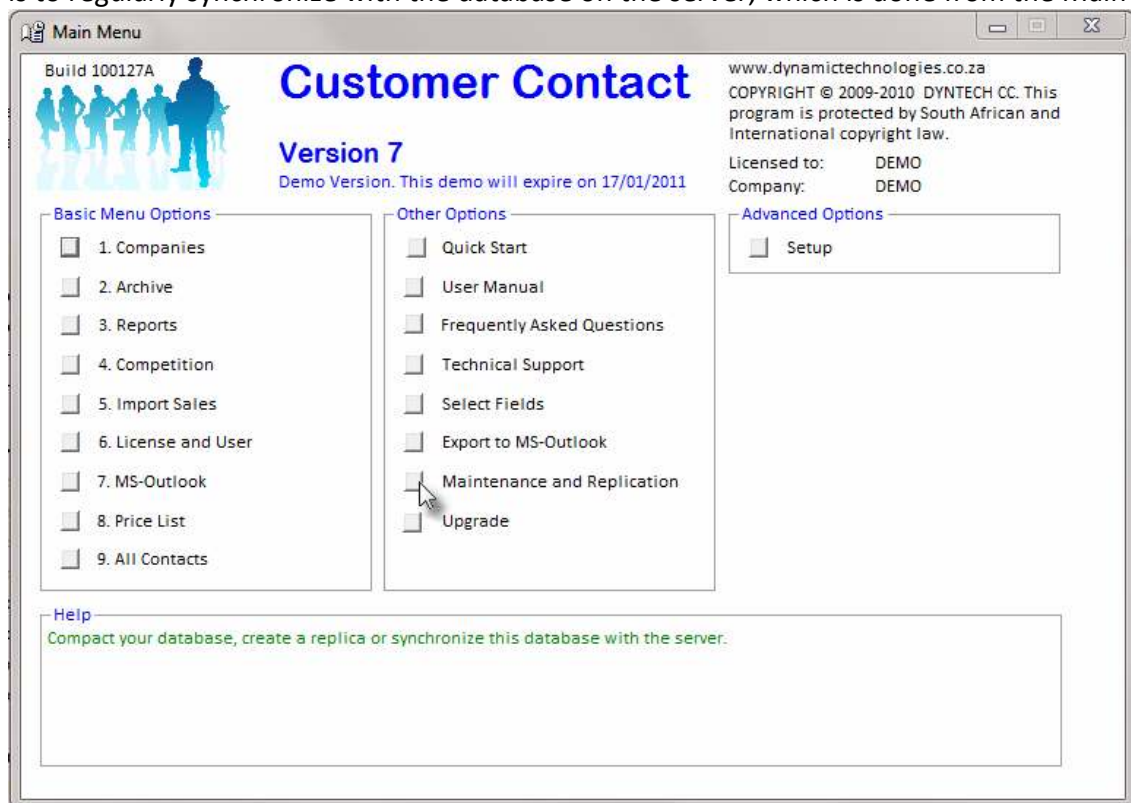
Click on 'Register'.

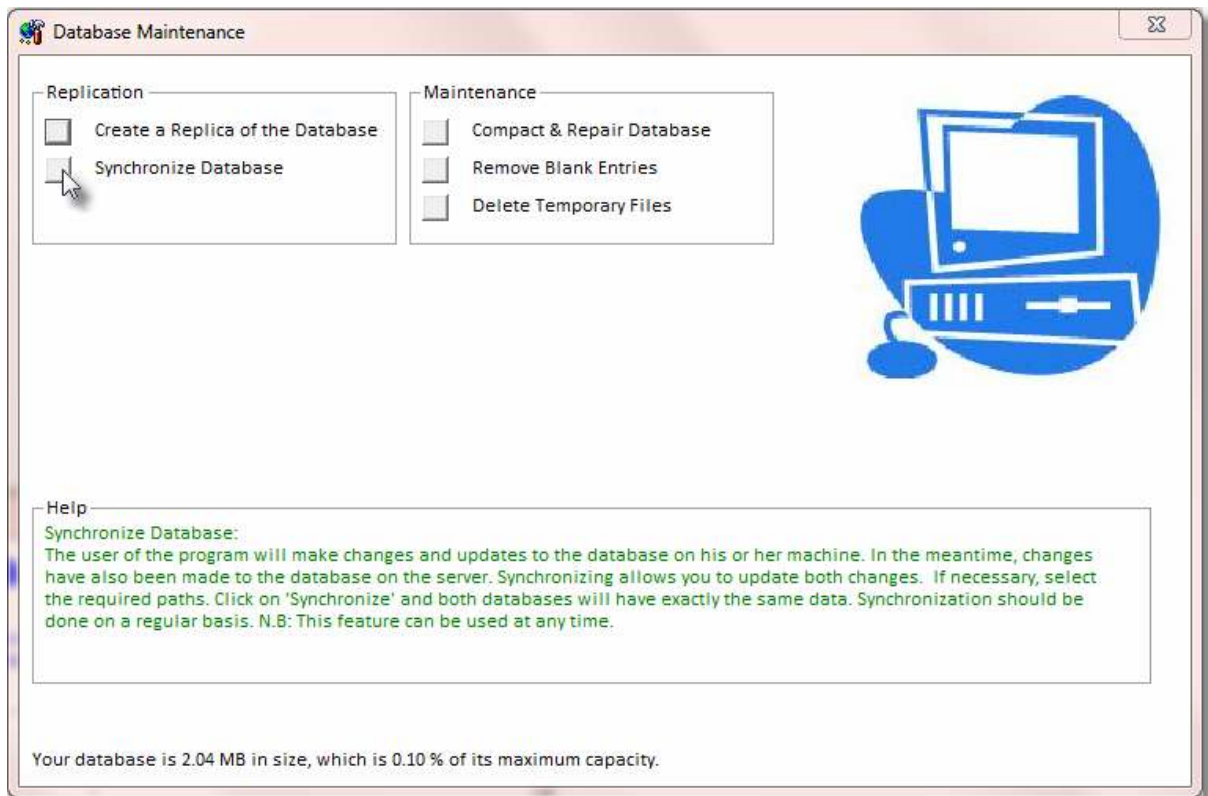


Click on 'Browse' and select the path to the database 'CONTACT.mdb', which you should have copied to the server. If do not work from a network, click the box 'Do not create a replica. I do not work from a network'. Otherwise, click on 'Create Replica'.

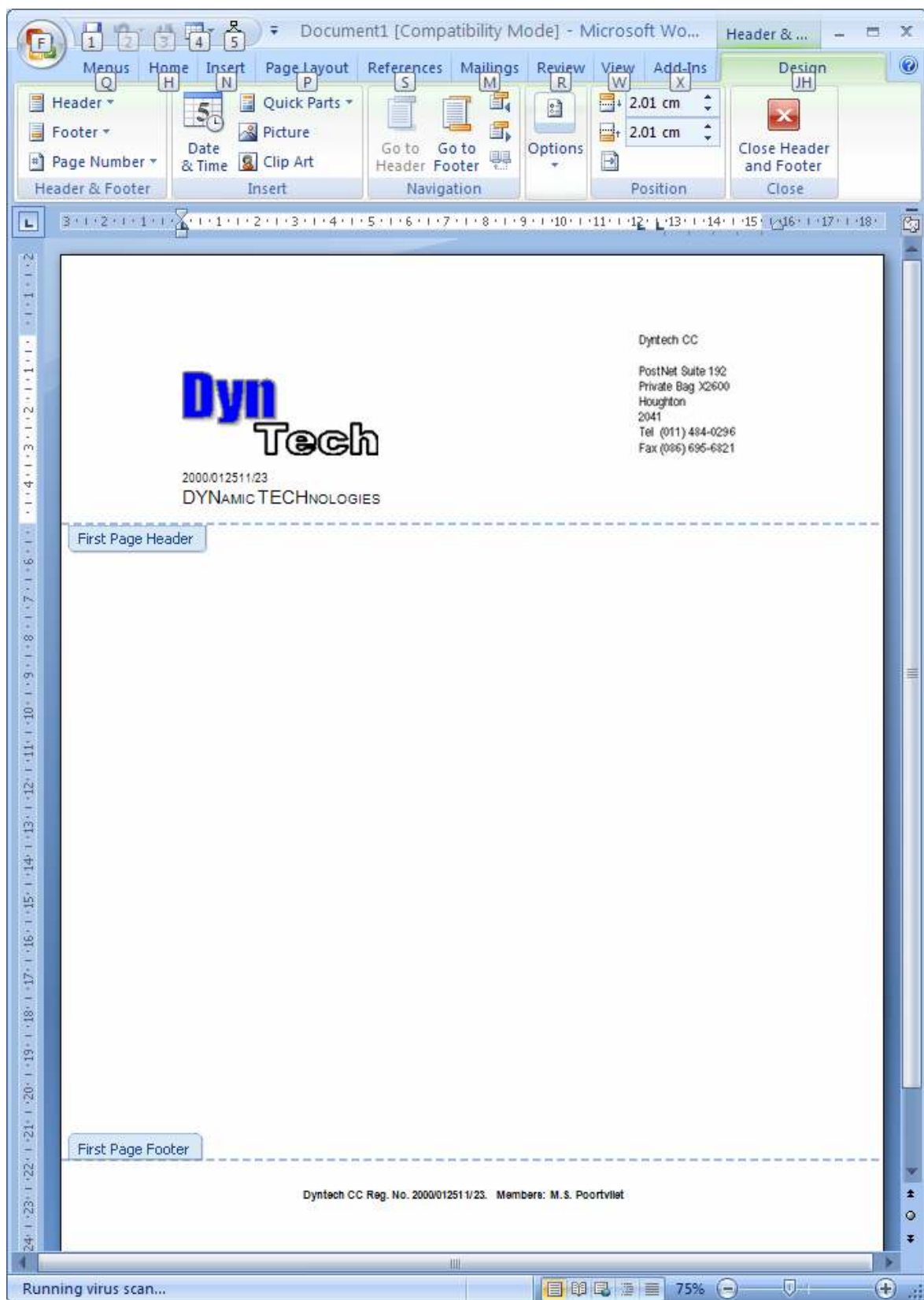


A replica of the database has been created on the user's computer. All he or she has to do now is to regularly synchronize with the database on the server, which is done from the Main Menu.





Your letterhead template is used for all correspondence (letters, faxes etc.) in the program. Your letterhead must have a header and footer with no text between the header and footer as in the following illustration:



You can edit the default letterhead, located in the folder where Customer Contact is located or you could overwrite it with your own. Do not change the file name, which should always be 'Letterhead.dot'.

## 2. Importing Companies

If you have information about companies stored in MS-Outlook, you can import some of this information into Customer Contact. The following information will be imported:

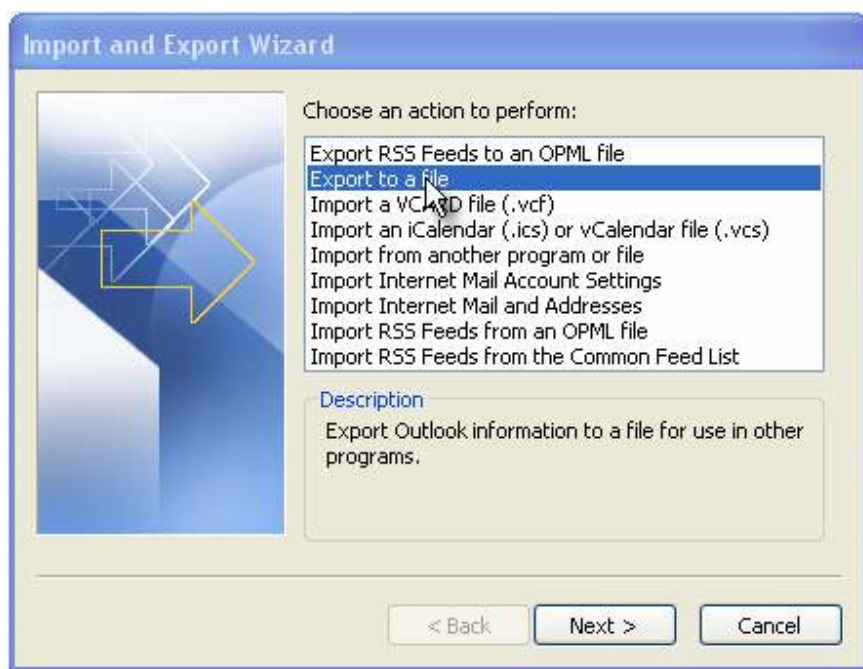
- Company name
- City
- Telephone number
- Fax number
- Website

In order to import this information, you would first have to export it from MS-Outlook.

Open MS-Outlook and go to 'Contacts'.

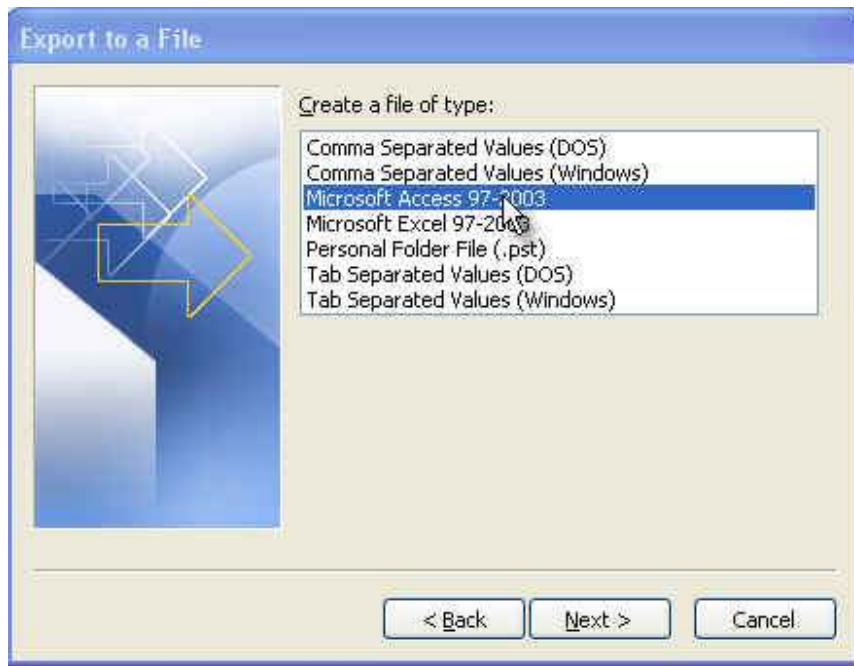
Select File, Import and Export...

Select 'Export to a file' and click on Next.

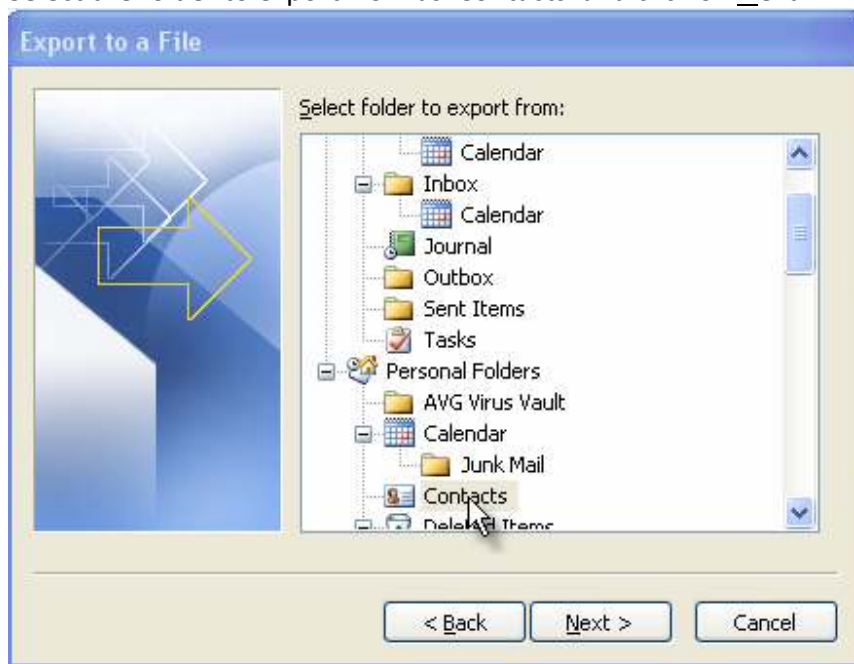


Select 'Microsoft Access' or 'Microsoft Access 97-2003' if you have the 2007 version of MS-Office and click on Next.





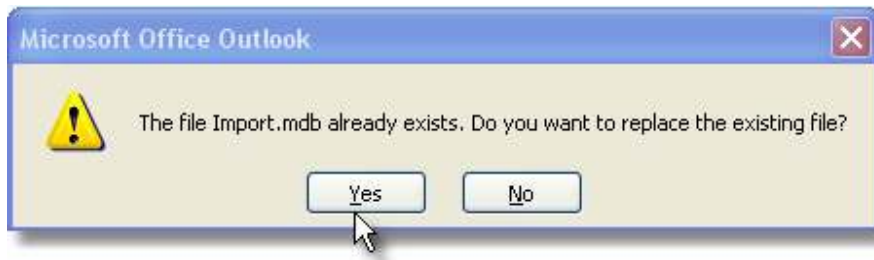
Select the folder to export from as 'Contacts' and click on Next.



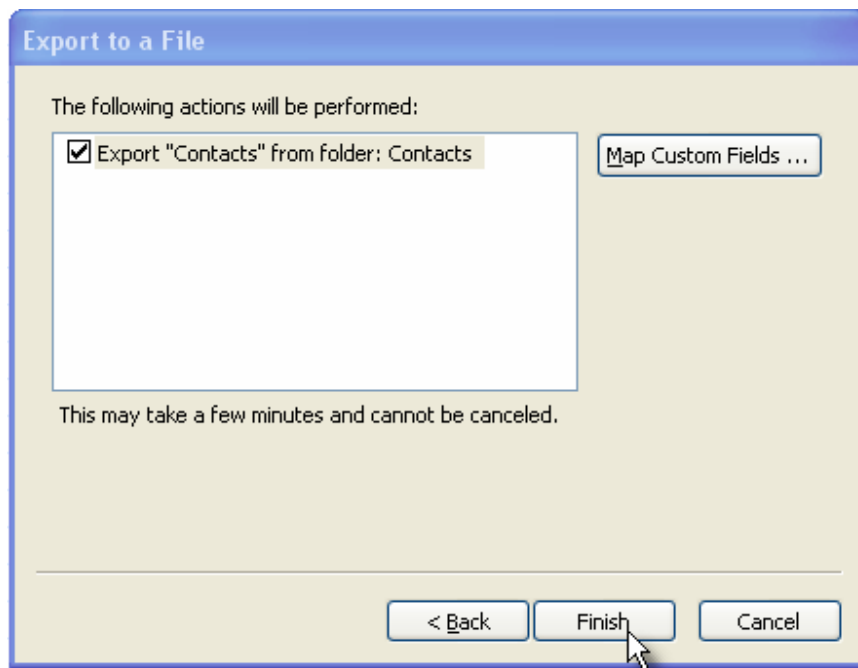
Click on 'Next' and click on 'Browse...'. Locate the database CONTACT.mdb, which is located in the folder where you installed Customer Contact (C:\Program Files\Customer Contact by default).

Ignore a possible warning and click on 'Yes' to proceed.

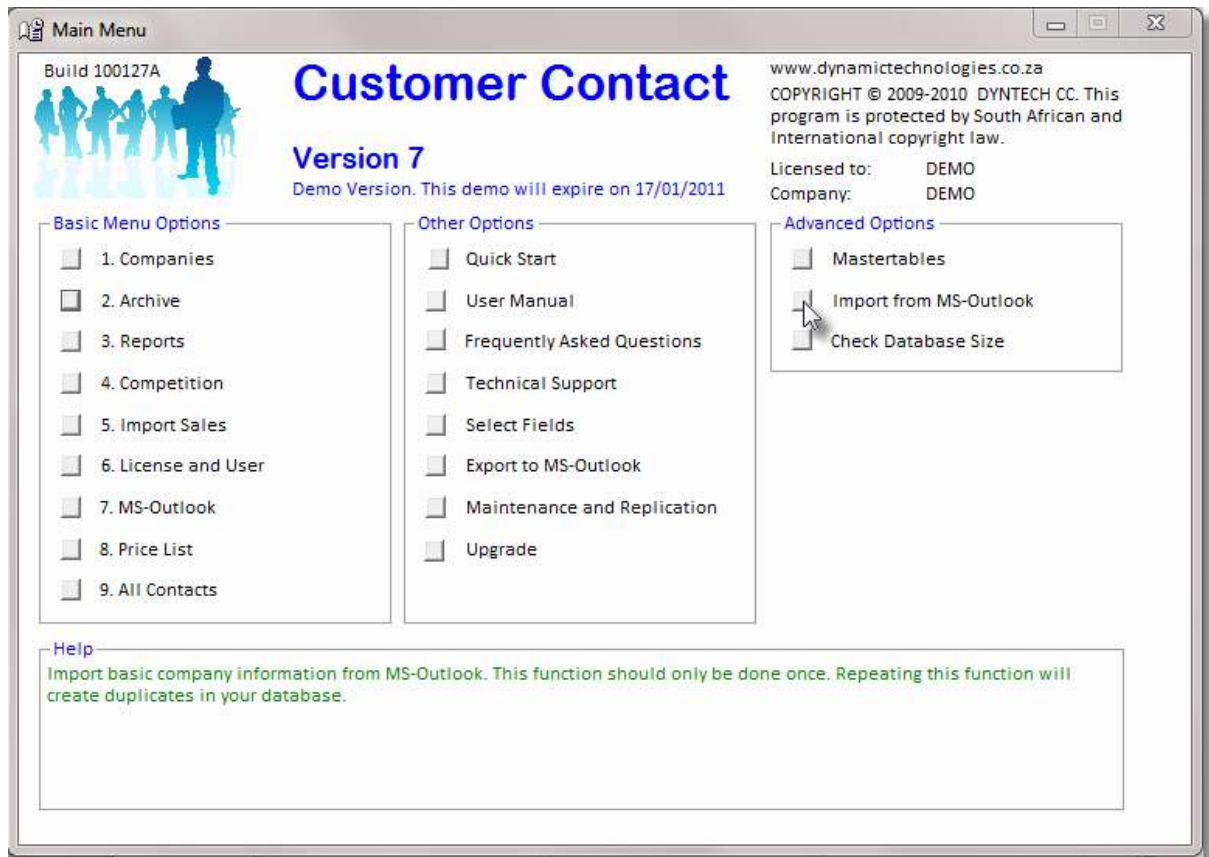




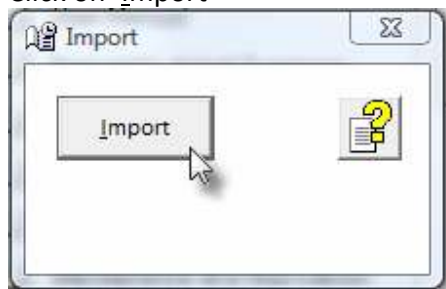
Click on 'Finish'.



Now that the data has been exported, as a final step, you have to import it into Customer Contact™. From the Main Menu go to 'Setup' (the default password is ***Password***) and click on 'Import from MS-Outlook'.



Click on 'Import'



### 3. Mastertables

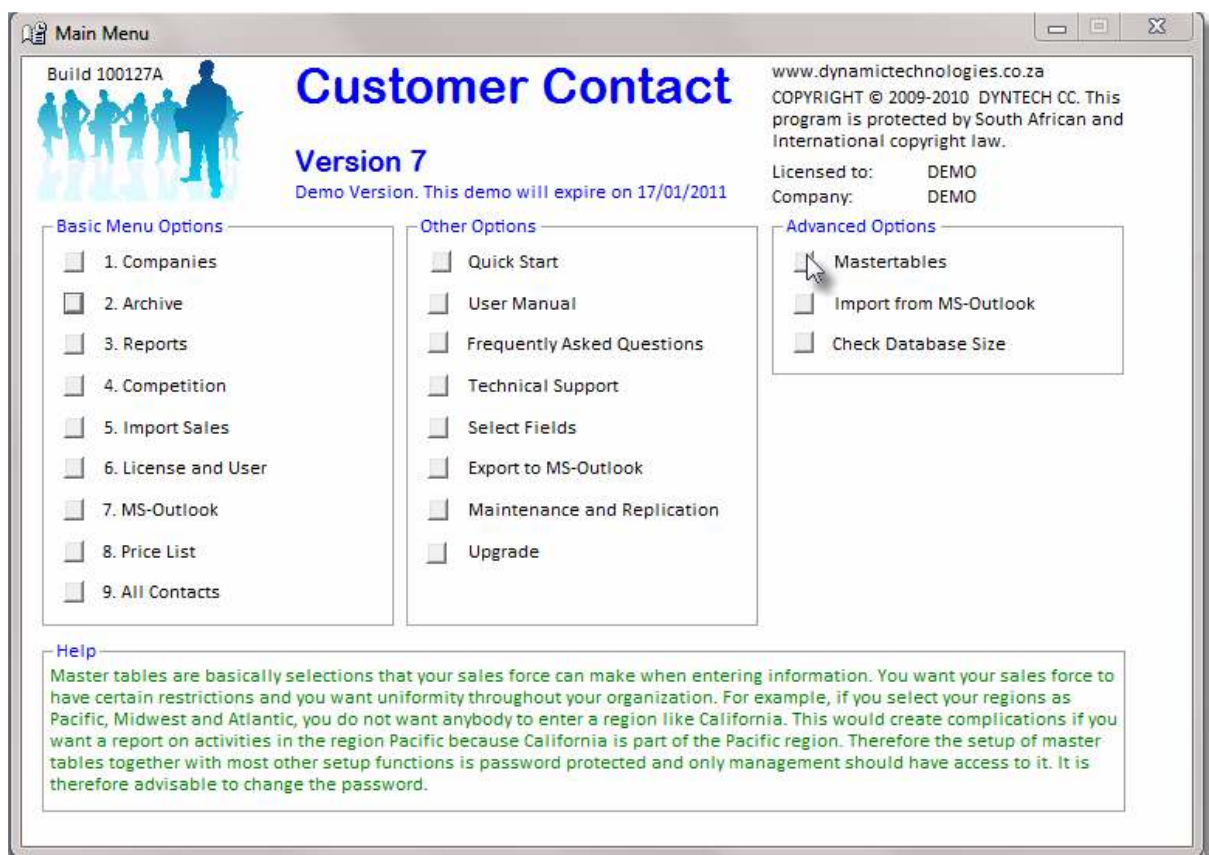
Mastertables are basically selections that your sales force can make when entering information. You want your sales force to have certain restrictions and you want uniformity throughout your organization. For example, if you select your regions as all 50 states in the USA, you do not want anybody to enter a region as 'Southern California'. This would create a problem if you want a report on activities in the state 'California' because 'Southern California' would be treated as a

separate region. Therefore the setup of master tables together with most other setup functions is password protected and only management should have access to it. It is therefore advisable to change the password.

On the Main Menu, click on 'Setup'. You will be prompted for a password. The default password is **Password** (case sensitive).

When you do change the password, remember that passwords are case-sensitive. If you forget your new password, it would almost be impossible to retrieve it.

Now click on 'Mastertables'.



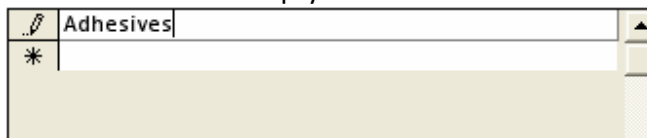
n

Mastertables have been allocated for:

- Regions
- Branch (*only applicable if your company has different branches*)
- Division (*only applicable if your company has different divisions*)
- Industry Group (*unless your company only sells one product or one range of products, you would have different industry groups. These industry groups are used when generating projects*)

- Projects *(the name given to a particular project. This would normally be the generic name of your product)*
- Category *(you might want to categorize your customers according to importance, e.g. A, B and C)*
- Sales Person *(all sales people within your organization)*
- Sales Manager *(if applicable, all sales managers within your organization)*
- Occupation *(refers to the generic name of the function or occupation of your contacts, e.g. purchasing, technical, accounting)*
- Title *(the title of your contacts, e.g. Mr. Mrs. Dr.)*
- Type of Company *(the program is not only used for customers but also for suppliers, prospects etc.)*
- Method of Contact *(refers to call reports and could be Meeting, Telephone Call, Delivery etc.)*

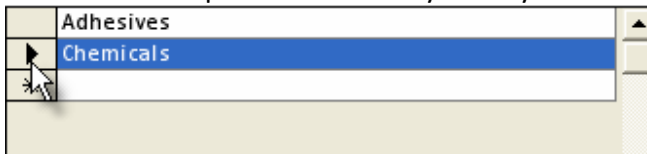
To enter information into Mastertables, click on 'Edit', and enter the required information you want into the first empty field.



Adhesives

Continue entering information in the empty field below etc.

To delete information, click on 'Edit', select the field to be deleted, click the header on the left of the field and press 'Delete' on your keyboard.



Adhesives
Chemicals