User's Manual

Users Manual

I hope you will find this program to be easy to use, and that you find it provides good value to your organization. I welcome your comments. Dennis Baggott.
dbandsons@aol.com

Michael's Generic Customer Support 2006

Special thanks to:

My wife for tolerating my obsessions with trying to develop quality software at reasonable prices, and to my sons, Ryan and Michael. Dad is trying to leave you more than a business, but a legacy of caring about doing your best.

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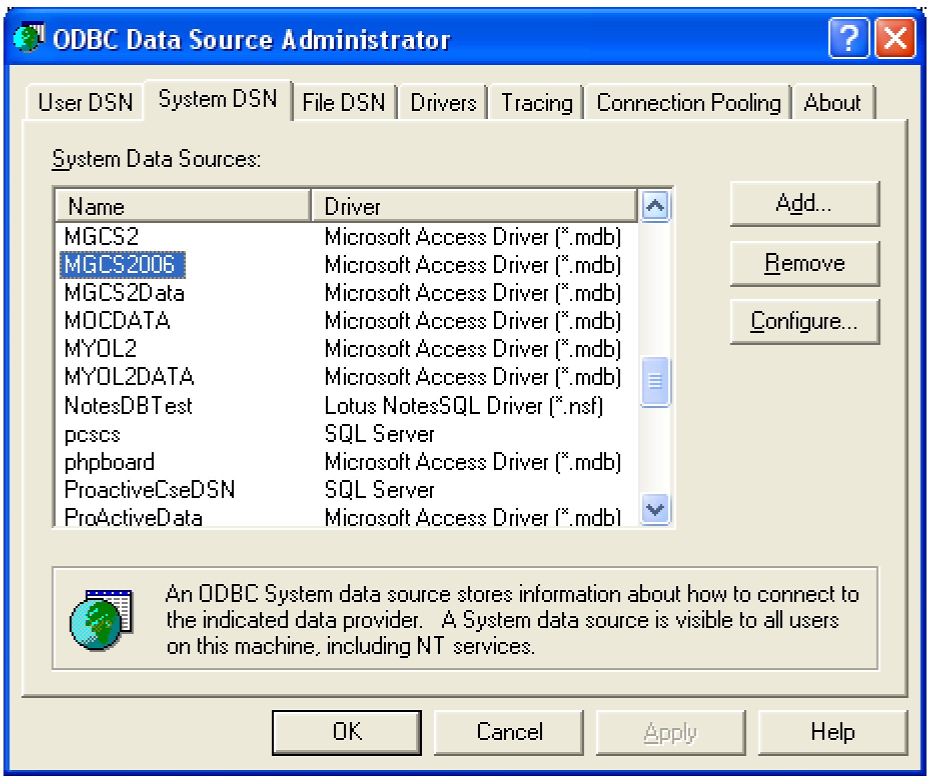
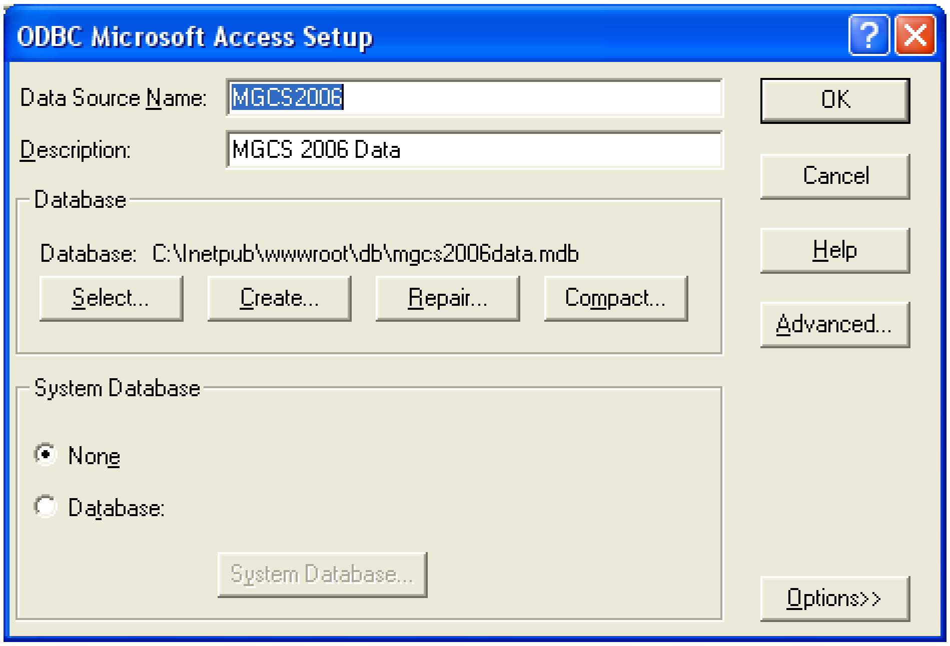
1 Introduction

1.1 Overview

MGCS (Michael's Generic Customer Support) 2006 is intended for organizations that want a simple, easy to use method for recording and reporting on calls from customers. The program consists of a 32 Bit compiled windows application, an optional browser interface consisting of Active Server Pages and .html templates for use on Microsoft IIS, and a simple applet for the Pocket PC. Whether you use only the windows interface, or the web interface, there are no per user charges and the program is multi user ready. The back end database is a Microsoft Access .mdb file. The database file will be installed by default to c:\inetpub\wwwroot\db and, if using the web interface you will need to be sure the Internet Guest account (IUSR_yourmachinename) has rights to this folder. The web interface connection to the database is in the common.asp file. You may need to edit this file if the database - mgcs2006data.mdb - is not in that location. If multiple users on the network will be using the windows application to connect to the same database, you will need to map a drive to letter to the shared location of your .mdb file and then use the ODBC 32 applet in the control panel to point the system DSN to the new location of the database.



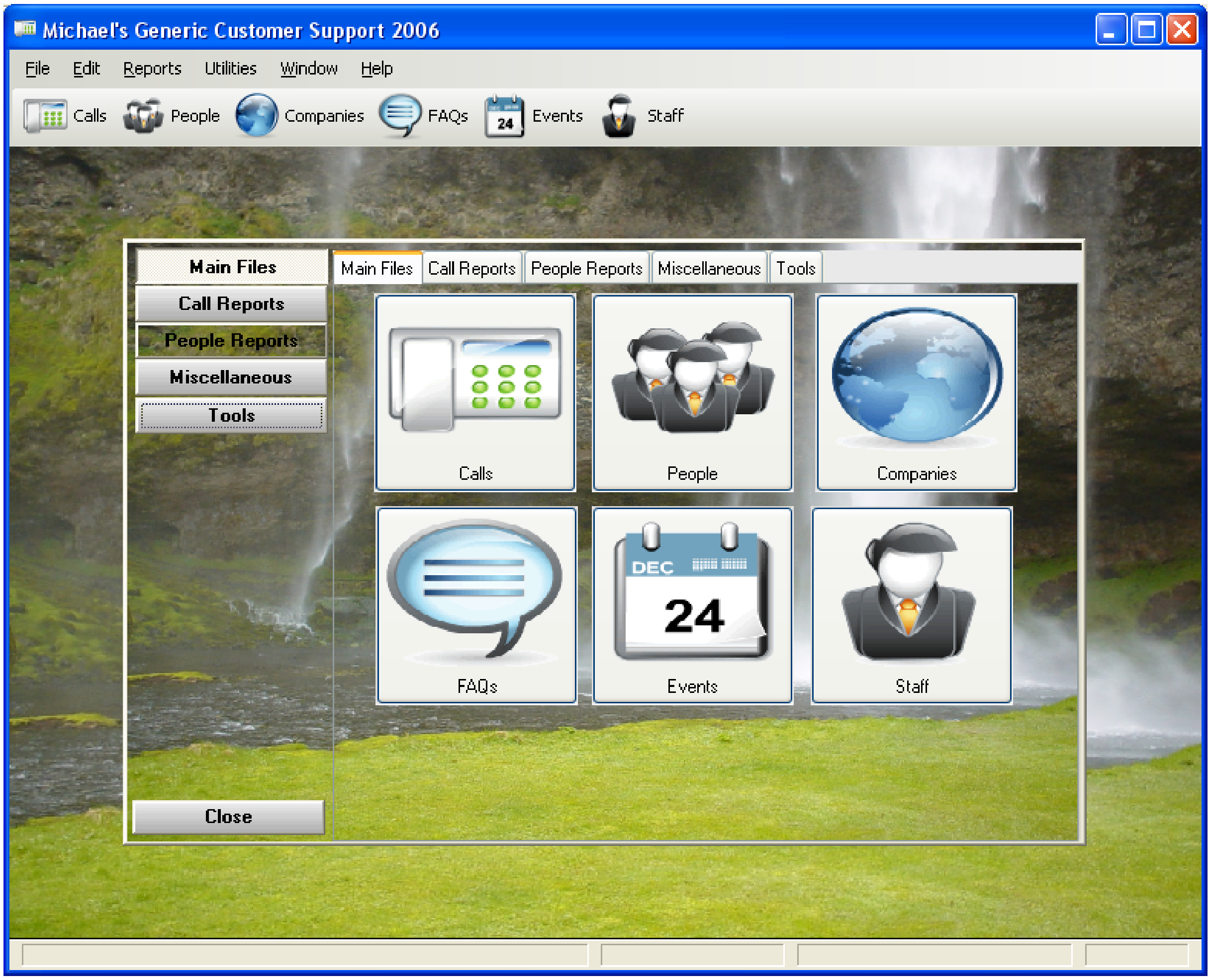


The program is set up so that if multiple users on your LAN are running the program connected to the same database, whenever one user makes a change this may be automatically reflected to other users. They may see their browse screens updated with data changed or added at other workstations. If you see a warning message when you first start the program telling you that the program is trying to conned with the Internet, it is not sending me any information. It is looking to see if other computers on the LAN are running the same program in order to display changes.

This 2006 model or version of MGCS has many changes over prior releases.

1.2 New in MGCS 2006

If you have used an earlier version of this program, you will find many changes in this release. I have provided several "styles" to give the application a different look and an included "styler" utility will let you change the provided styles or create your own. Maybe use a picture of your wife or your kids as a backdrop for the main window. In some cases you may want to use the program without styles, perhaps you have an older video card, or will use the program with Citrix or have some other reason to want a "plain" look and feel. This is possible, too.
I have replaced the side bar menu from earlier versions with a push button style menu.



This version now includes much improved importing options to make it easier for you to get data from some other data source, maybe an Excel file or another Access .mdb file, or even .dbf style files. You are no longer limited to importing from a .csv (comma separated value) formatted file.

I have made a number of changes to the database structure in this release. The company table no longer is just the company name but lets you enter more information about a company a customer may work for, and then when adding new people records, when you select the company name the address information will be automatically filled in for you.

The default "person type" is still customer, but now this may be used to identify a person as a customer, staff member, supplier, or whatever you like. This way the person table may be more value to many organizations.

Print buttons on many update form screens allow a quick way to print a single record, almost like a screen capture, but uses less ink since background images are not included.

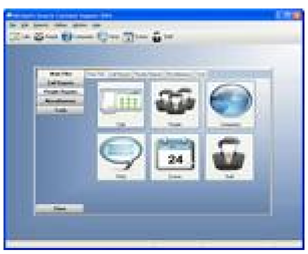
In earlier versions, drop down list boxes for selecting the person assigned a call, of the person completing a call were selected from the People table with a filter in effect for the Person Type equal to Staff. In this release those fields are populated from the Staff Member table.

1.3 Styles

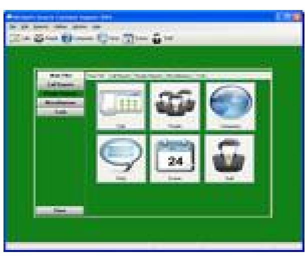
I have provided several styles to get you started. You may use the included styler utility to create your own backgrounds. A good idea may be to start with a style like "shop" or "silver" and use the Save As option to save that style with a new name. Copy any background image you want to use to that same style\folder and then choose that image for your main "frame" background. Below are some screen shots of a few of the styles I have included. The included Styler program will let you create your own styles or modify existing styles.

FALLS Style

MIX Style



SHOP Style



WATERMELON Style

SILVER Style

1.4 Technical Support - Registration

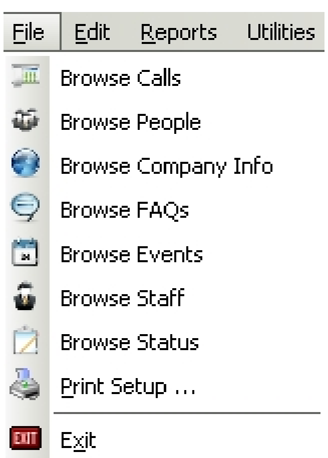
Technical support is free, just limited to email. Write to me with any problems or questions at dbandsons@aol.com - and this can also be during your evaluation period.

If you decide you like the program and want to continue using it beyond the 30 day trial period you will need to purchase a site license. This covers an unlimited number of users. The windows, web application and pocket pc applet are all included for the same price. See our ordering pages at http://www.dbandsons.com or http://www.lnsoftware.com - prices subject to change.

2 Using MGCS 2006

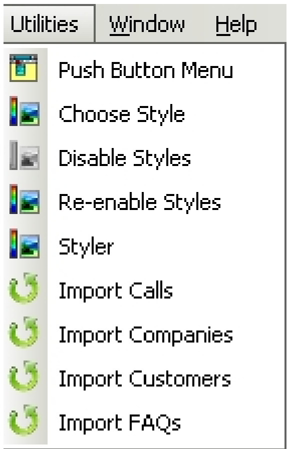
2.1 Menus

MGCS 2006 features standard drop down menus as well as a push button, or switchboard style menu.



The options on the File menu are shown above. You will most often work with the Calls and People files so they are the first options under the File drop down menu.

I have included a number of reports I hope you will find useful. In addition to standard reports the Report Wizard let's you easily create reusable reports you can save and use whenever you like.

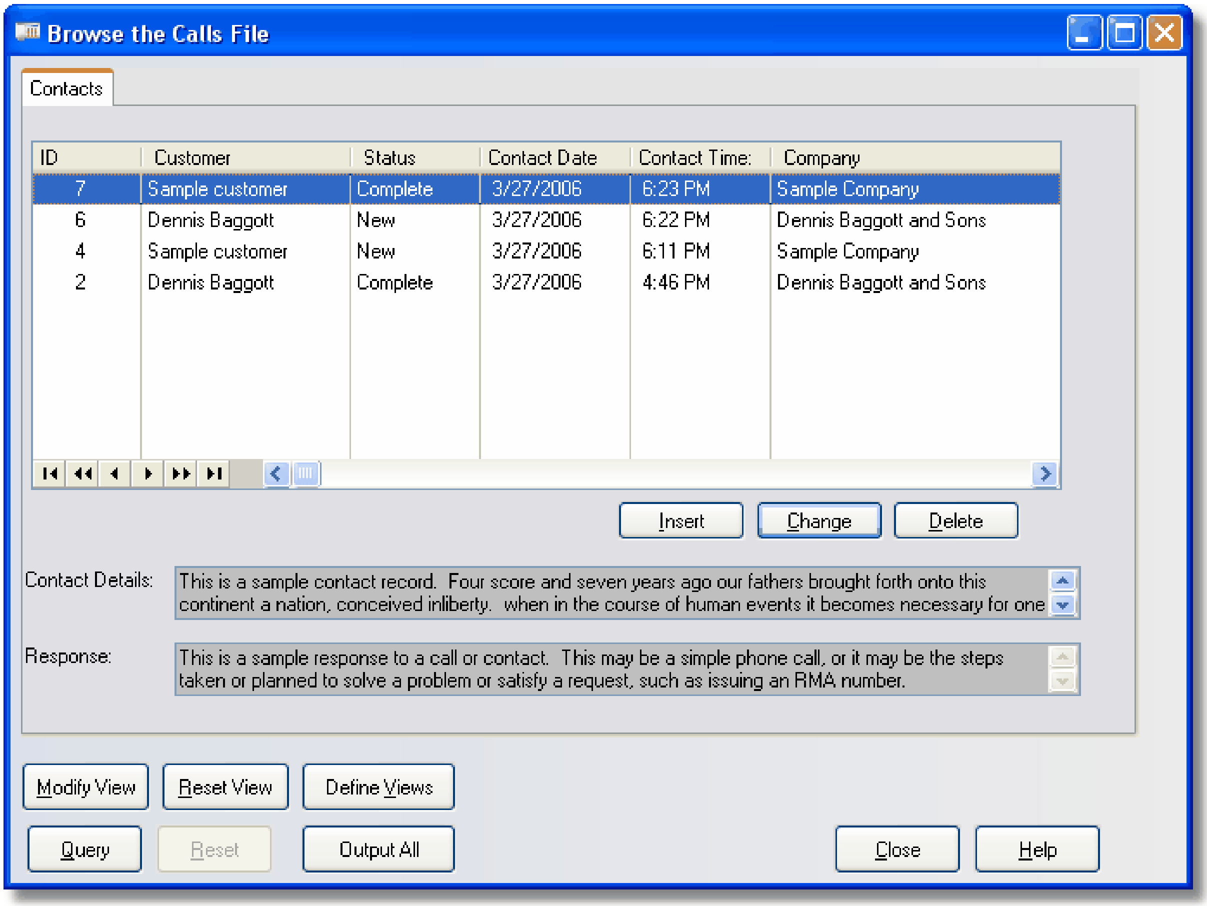


The Utilities menu drop down let's you activate the Push Button menu, work with Styles, or Import information from other data sources.

2.2 Browse Calls

This screen is one you will use most often since it is where you will view the calls that have been entered in the database, and this screen will let you add, delete or modify calls. The Insert button will show a fill in the blank style form where you can add a new record, while the Change button shows the same screen to let you edit the selected call. The Delete button removes the selected record from the database.

The Call Details and Response are showed in read only text boxes under the list of records.



Modify View and Define Views buttons let you change or create a new "view" of the data to be displayed. You can use the View Wizard to define what fields you want displayed and using a particular sort order. The Reset View button restored the screen to the default view.

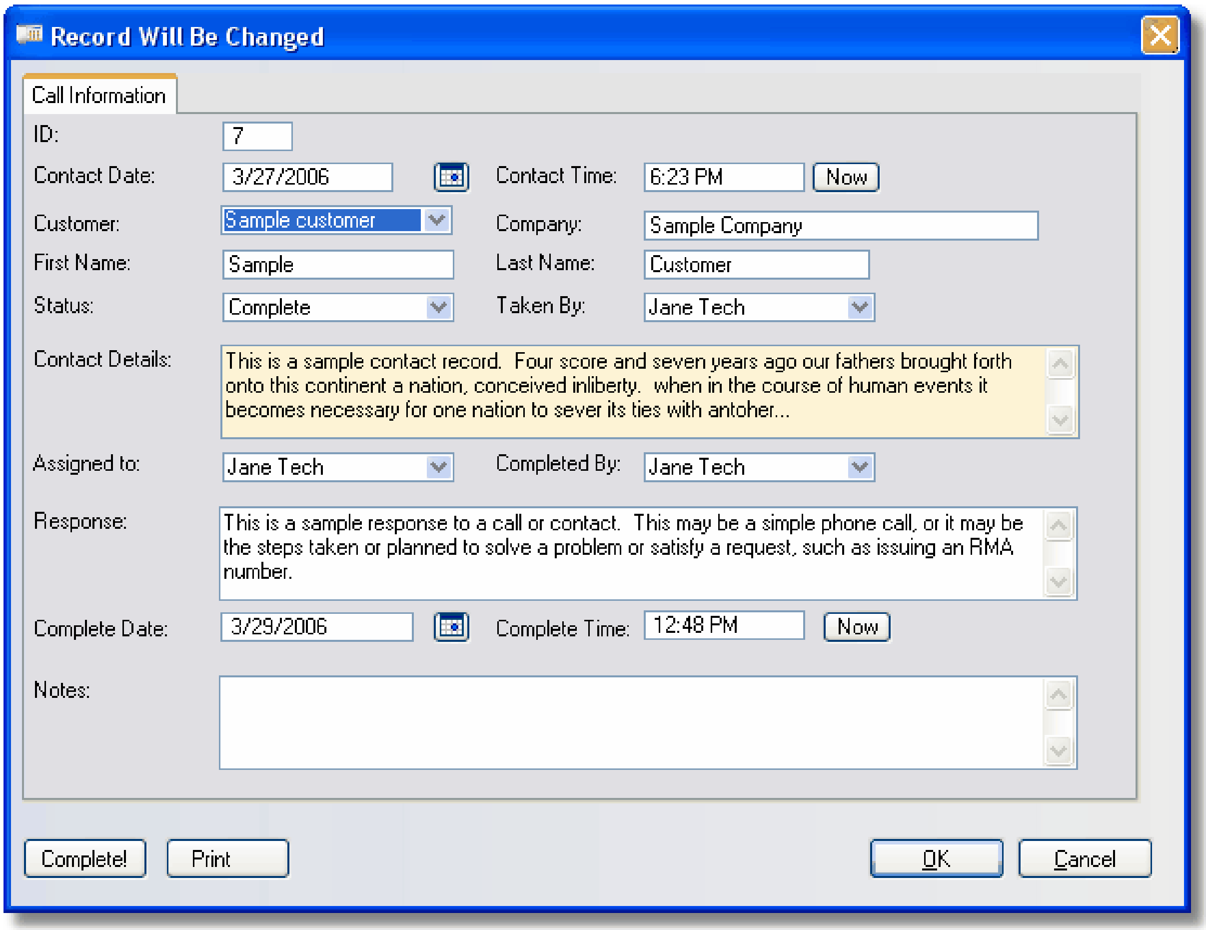
A Query button will you use the Query Wizard to select, or create a query to filter the records displayed. When a Query is in effect, the Reset button removes the query from the browse screen to show all records.

An Output All button will launch Microsoft Excel with the data from the browse screen.

2.3 Update Calls

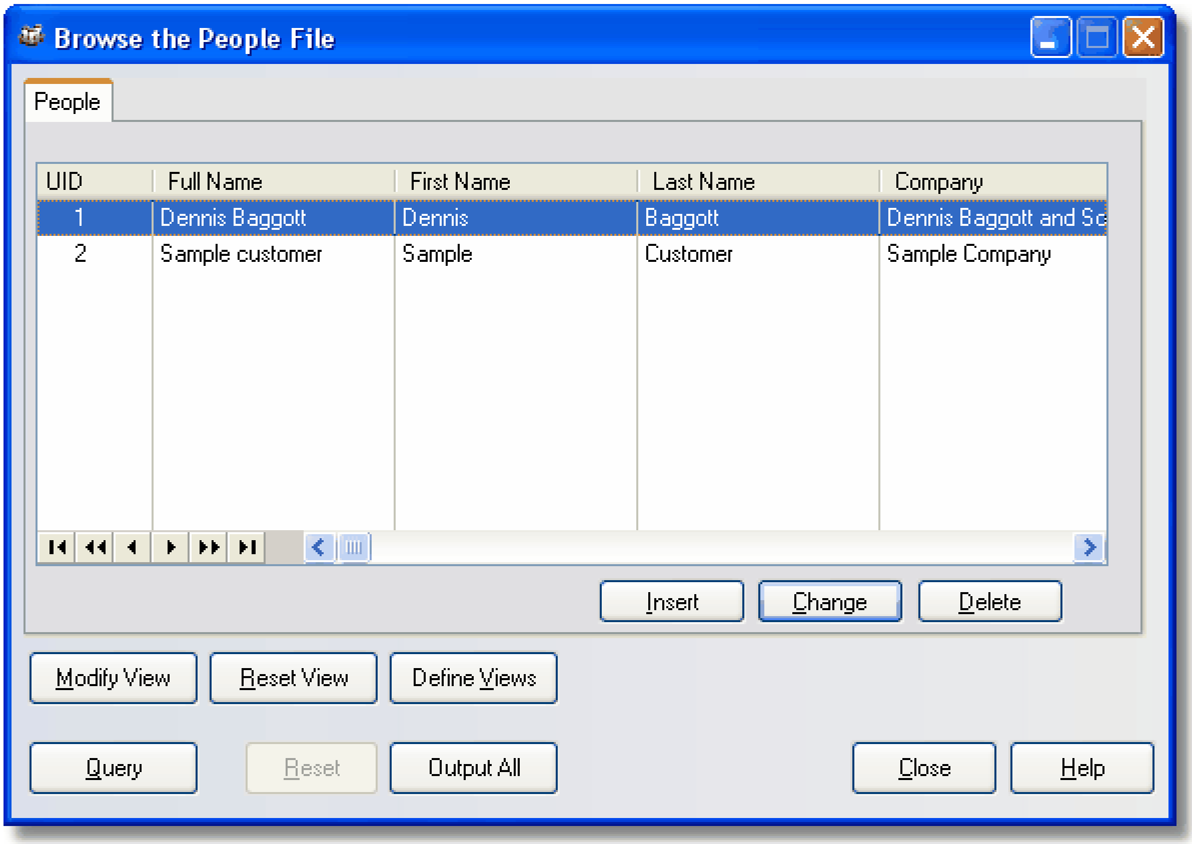
This screen is used to add or change calls from your customers. An ID field will be incremented by 1 each time you add a new record. The Call date and time will be entered automatically (though you can override this if needed). The customer can be selected from the drop down list (you must add your customer information first, before adding a call record) and this will fill in their company name, if any, as well as their first and last name. The Status field will default to new. You may then choose the staff member who took the call, enter the Contact Details (required) and the person assigned to the call. A drop down list is also provided to enter the person completing the call. The Taken By, Assigned To and Completed By fields are all populated from the staff member table. You can then record the Response, or action taken for the call.

You can manually enter the Complete Date and Complete Time, and change the status to Complete. However, if you click the Complete button at the lower left of the screen these fields will be automatically entered for you. A Print button is also provided to let you quickly print a record of the call, which you can save as an Adobe format .pdf file during preview if you like - no other software is needed to create the PDF file, but you will need the Adobe Reader software to view the created file.



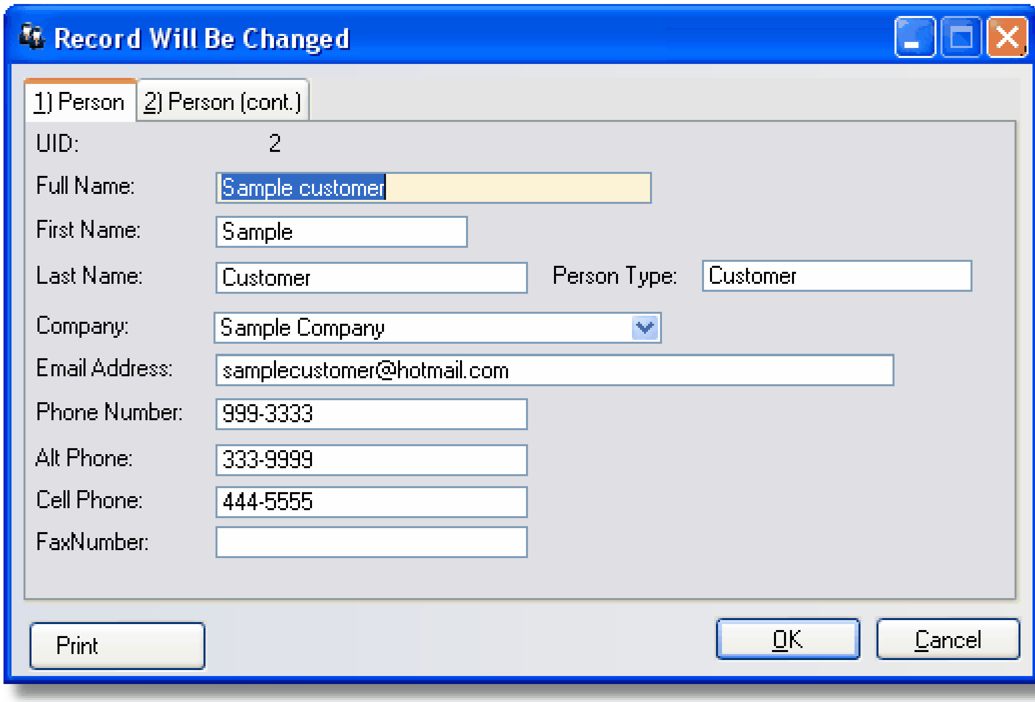
2.4 BrowsePeople

This screen shows the people you have added to the database in rows and columns like a spreadsheet.



2.5 Update People

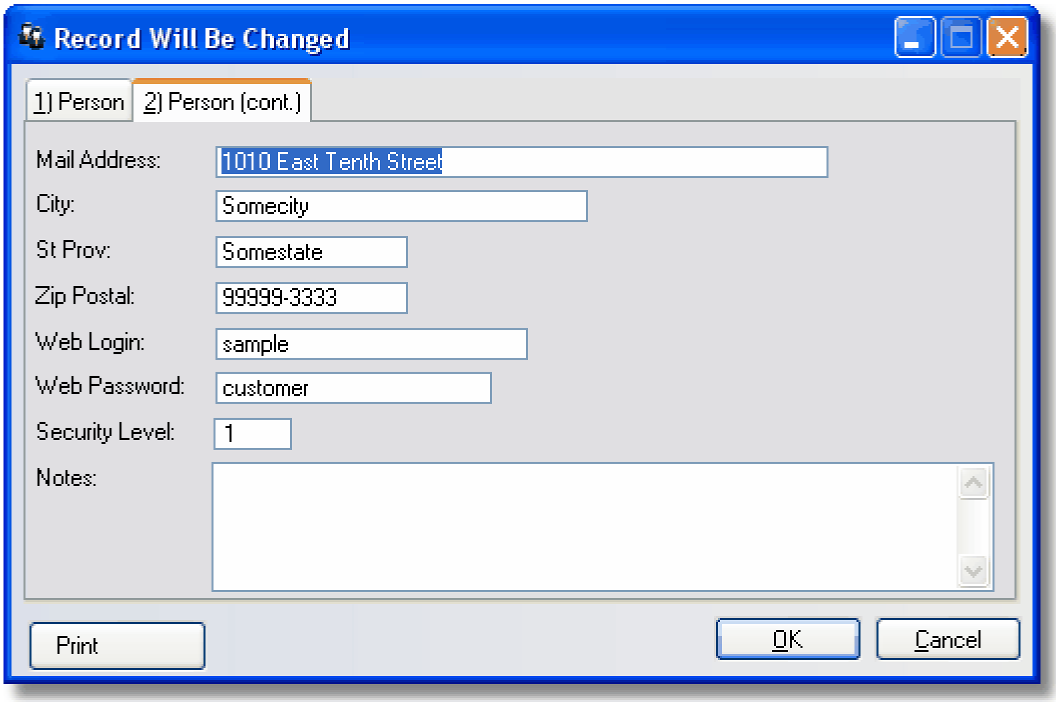
This screen is used to add or change individual people records.



A numeric ID field is created each time you add a person record. This field is used to "link" calls with a person if you are using, or will later use the web interface. That will allow a customer to enter their own requests and to view all requests they created or that you or your staff added for them. Think about how you want to enter the Full Name field. This field is used to populate lookup drop down lists so you will want to decide early on if you want to enter this first name last name, or last name, first name. Whatever you decide you will want to be consistent.

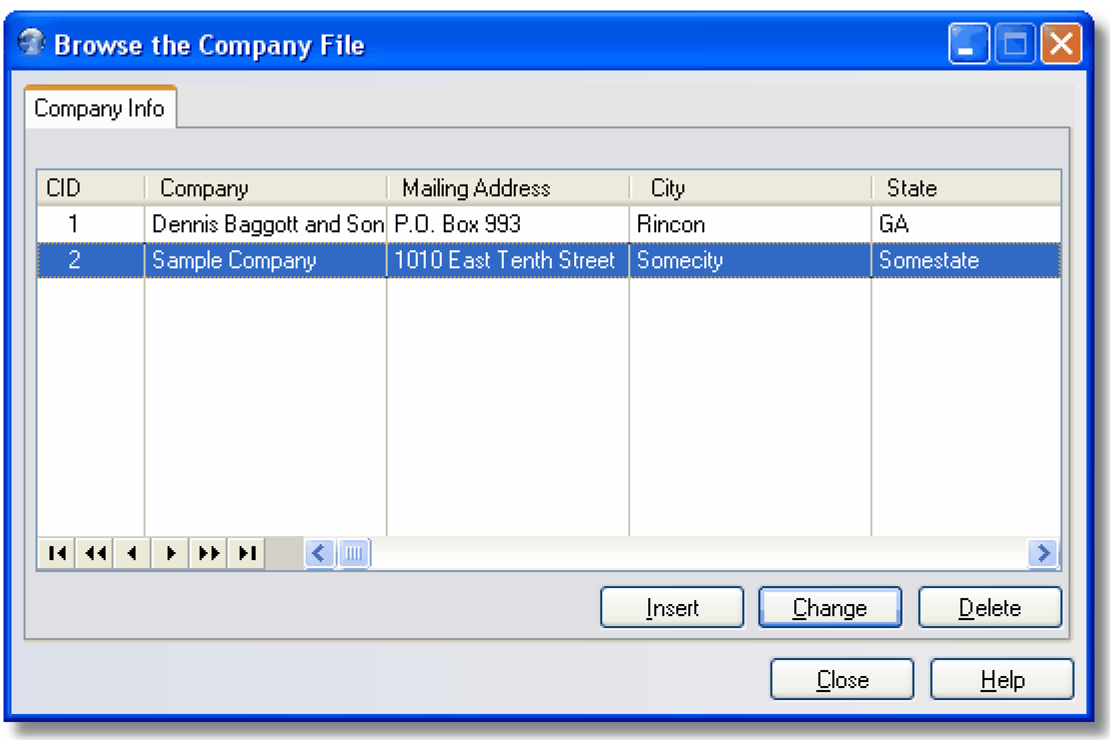
You may enter whatever you like for person type. Most often this will be customer, but some may want to keep vendor or supplier records in this table as well. Also, and very importantly, the same table is used for staff members to login to the web pages. A customer would only need a security level of 1, but a staff member would need a higher level security level, such as 3 to access pages from the staff menu.

I have provided fields to record the customer email address as well as several phone number fields. The next tab will let you record address information (if you selected a company from the drop down list, the address information would have been entered for you). You will want to enter a web login name, password and security level (default is 1 for customers). You may also record any notes about the person.



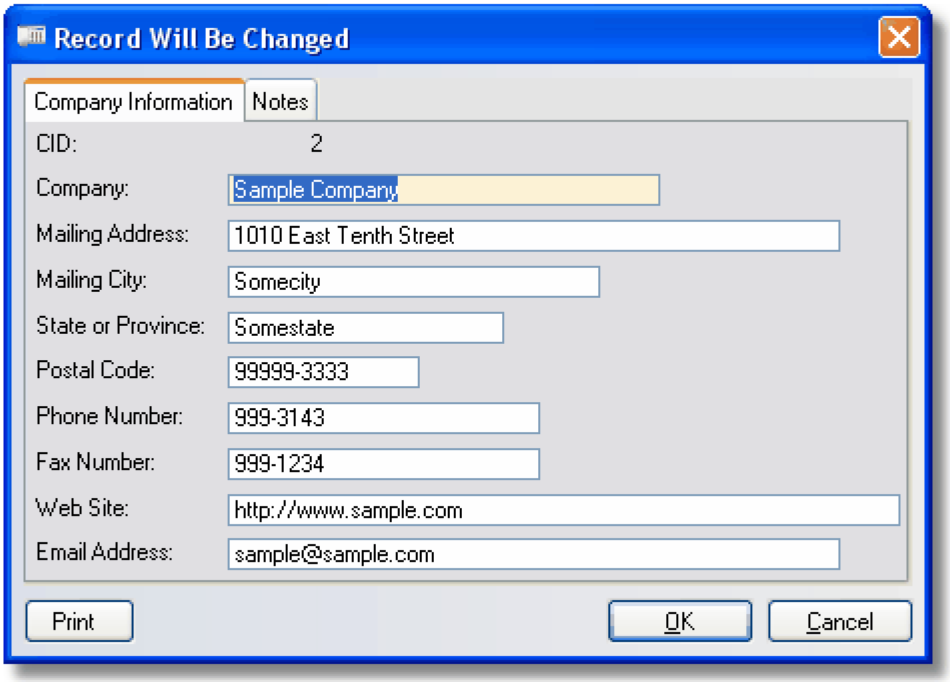
2.6 Browse Companies

This screen shows company records in rows and columns like a spreadsheet.

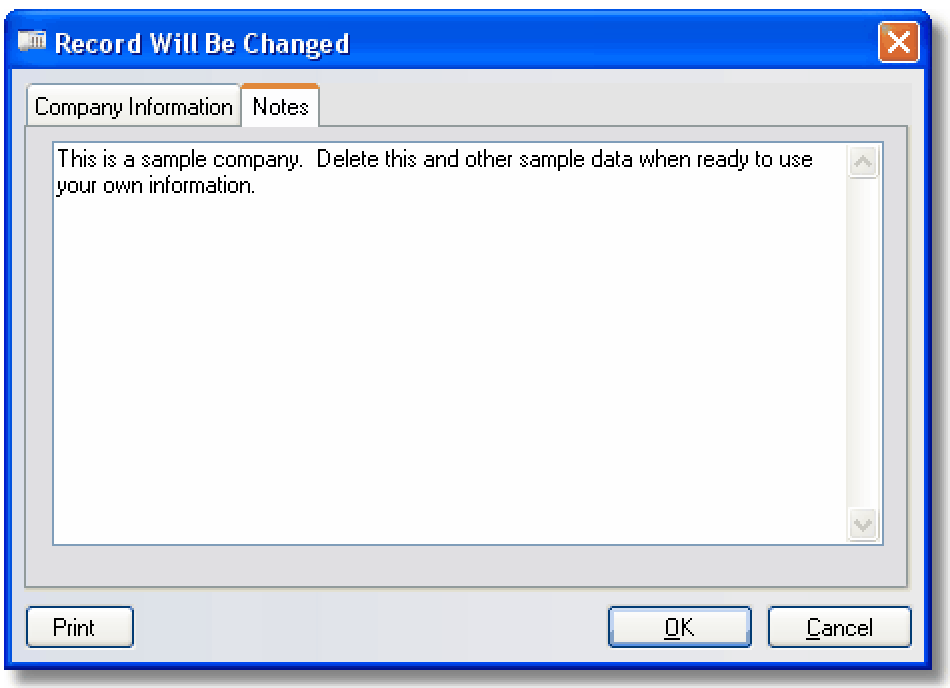


2.7 Update Companies

This screen is used to update company records.

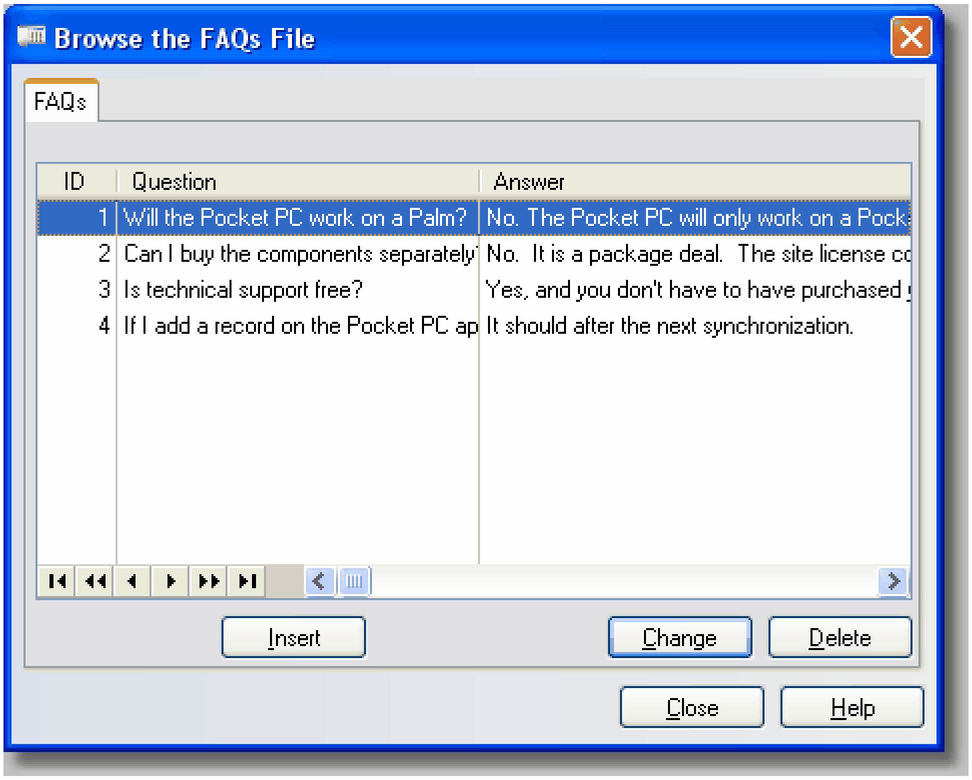


The Company name is the only required field



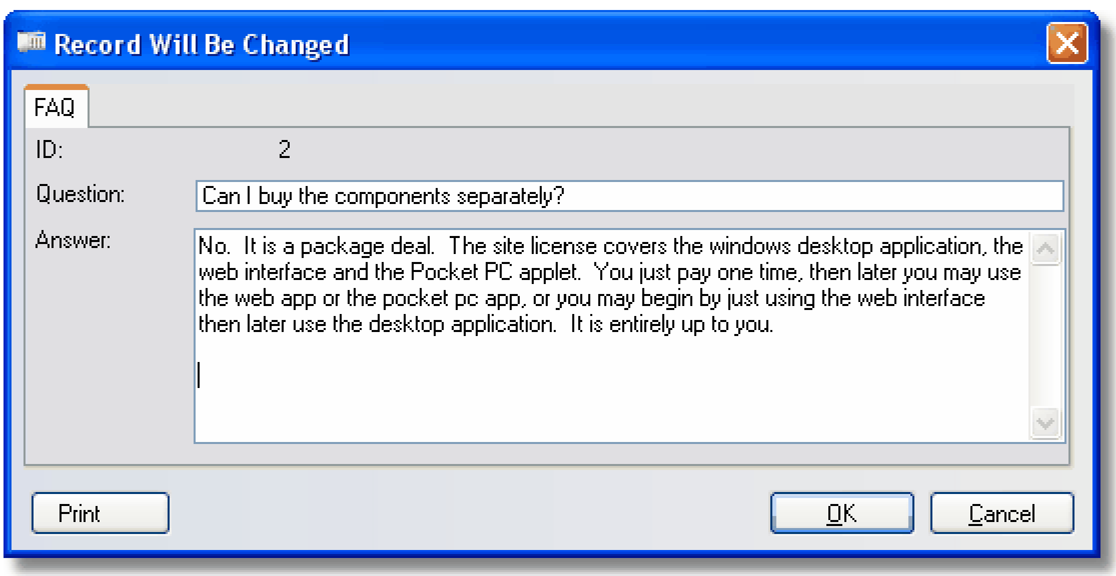
2.8 BrowseFAQs

This screens shows any Frequently Asked Questions (and their answers) in rows and columns.



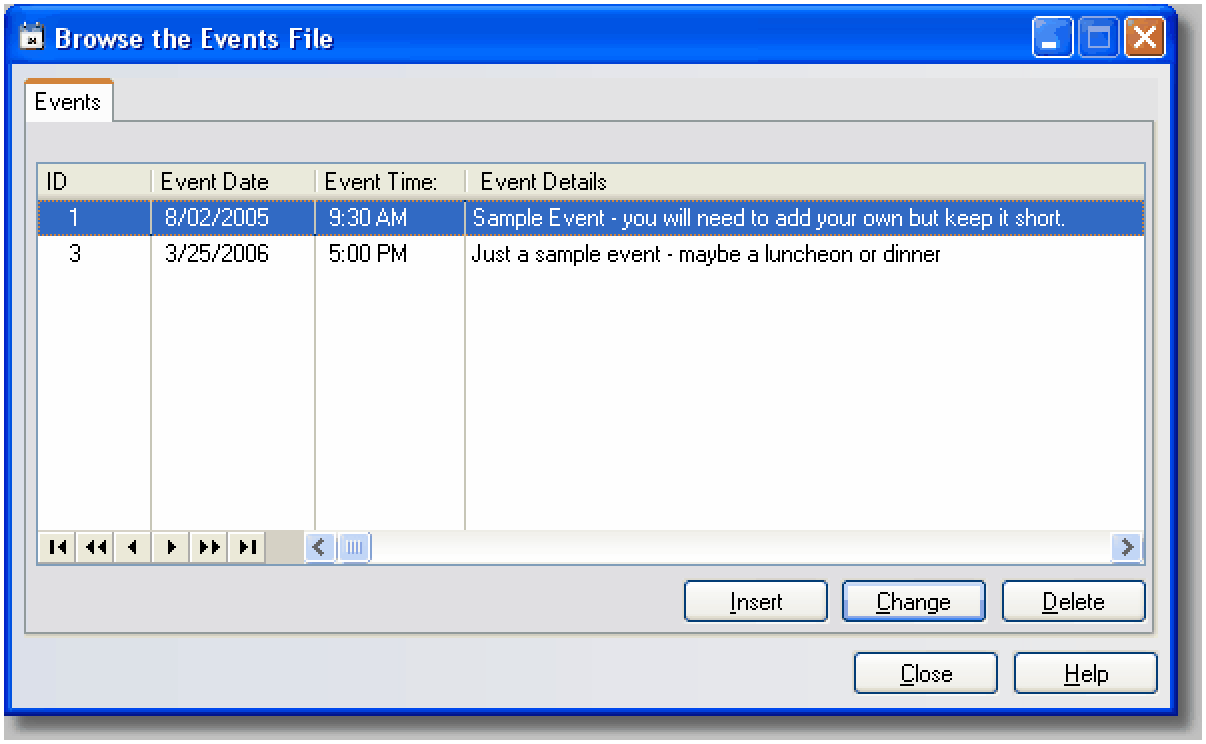
2.9 Update FAQs

This screen is used to add or update FAQs.



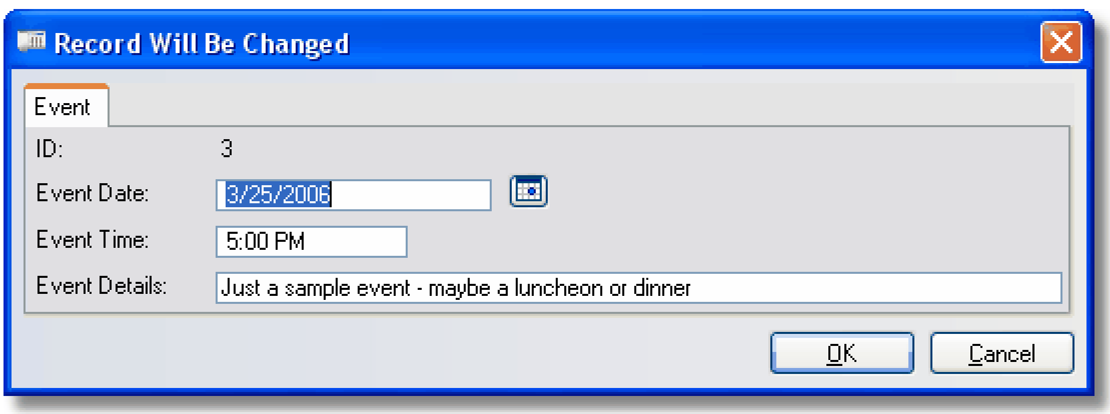
2.10 BrowseEvents

This screen shows any events you may have set up in rows and columns.



2.11 Update Events

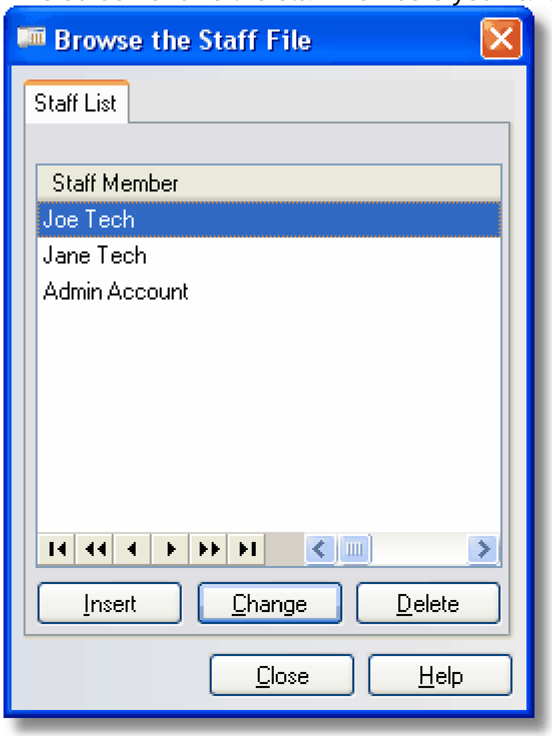
This screen is used to add or edit an event.



Not a real full featured scheduling or calendar system, this just provides a built in place to record such events as company holidays, when the boss will be out of town, etc. These events can also be viewed in the web interface.

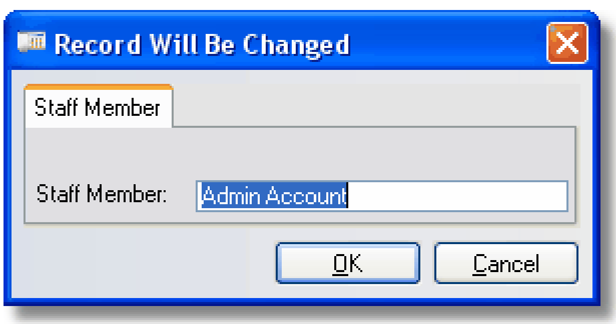
2.12 Browse Staff

This screen shows the staff members you have set up in the program.



2.13 Update Staff

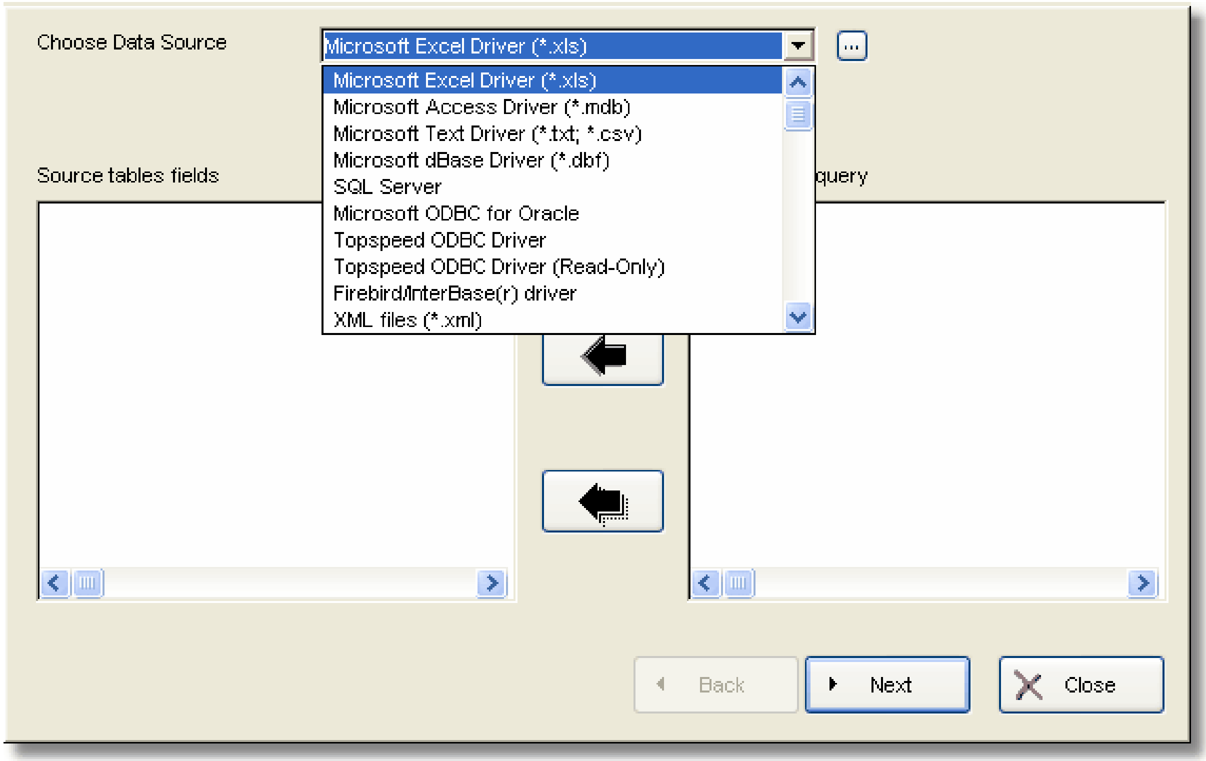
This screen let you add, change or delete staff members.



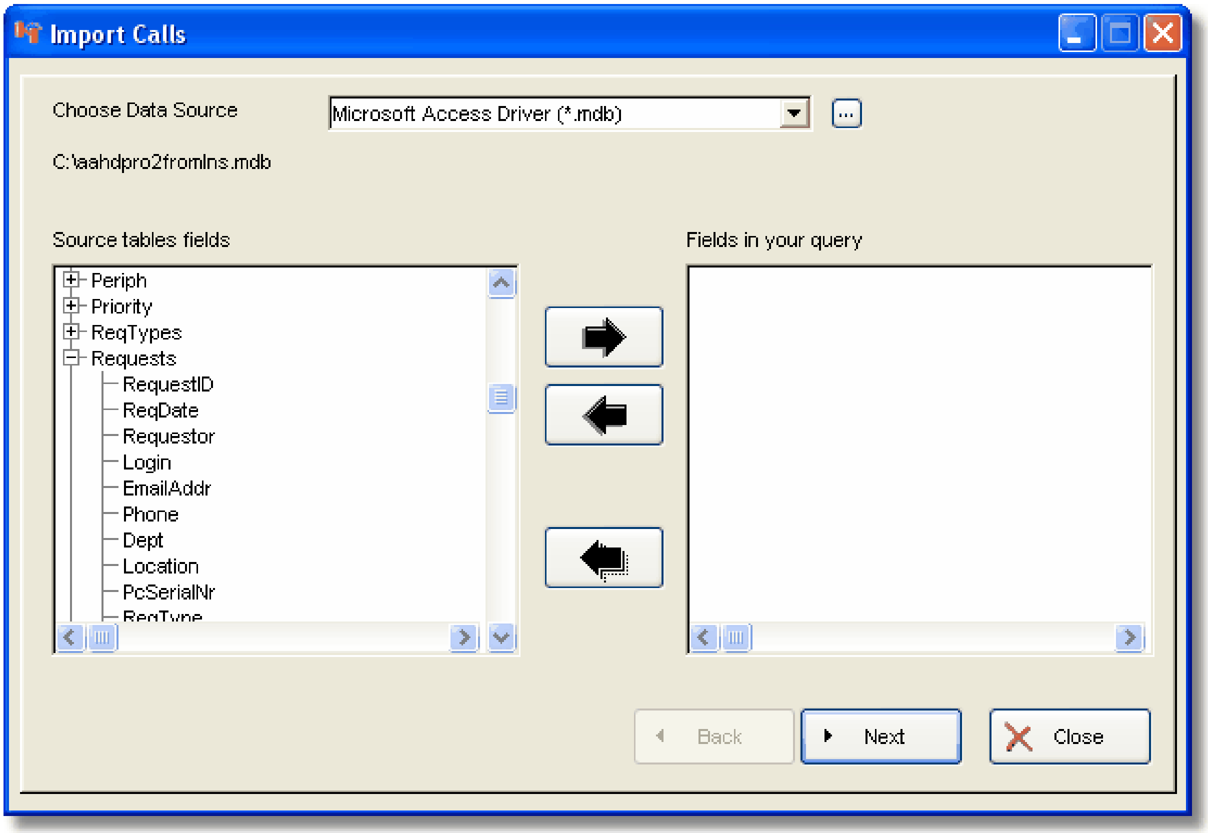
3 Additional Topics for Windows Application

3.1 Importing Data

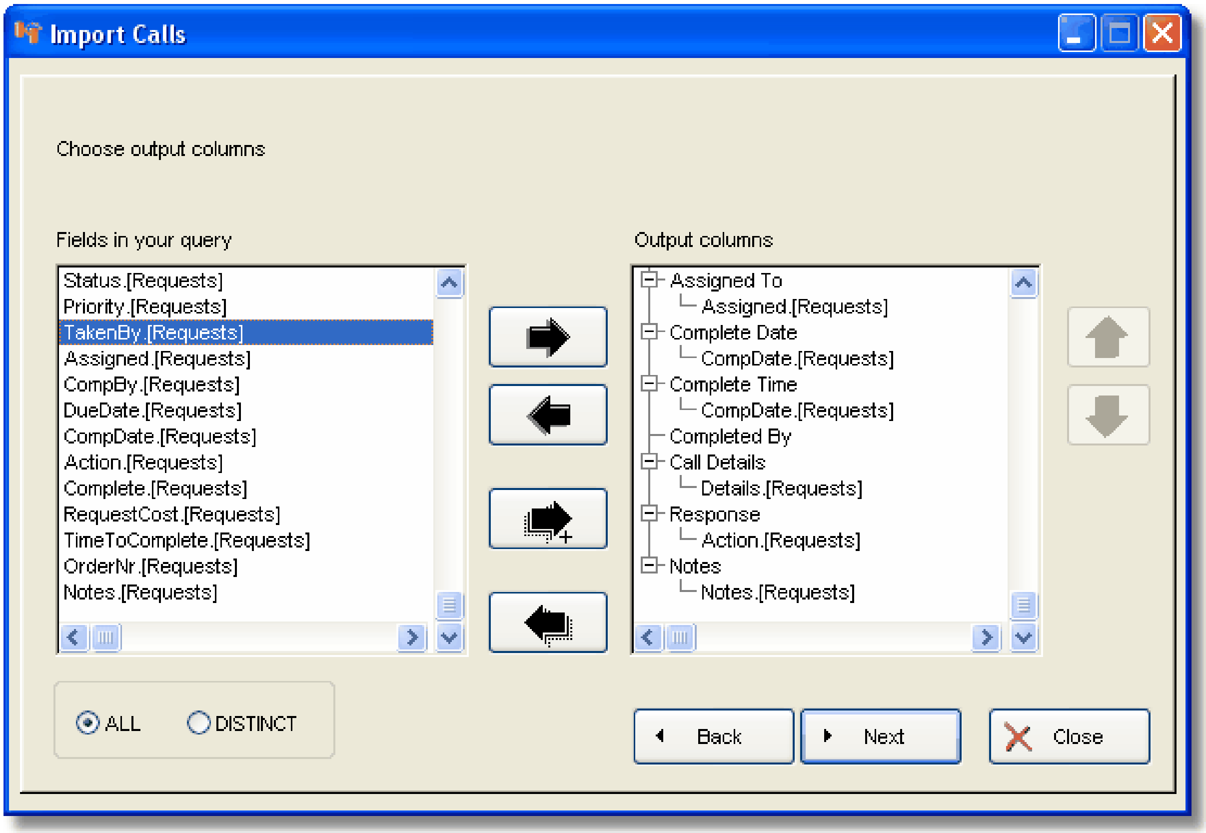
In this version I have improved the importing capabilities. When you choose one of the importing options you will first see what looks like a regular browse screen, but you will see an Import button at the lower left side of the screen. Click this button to begin the import process.



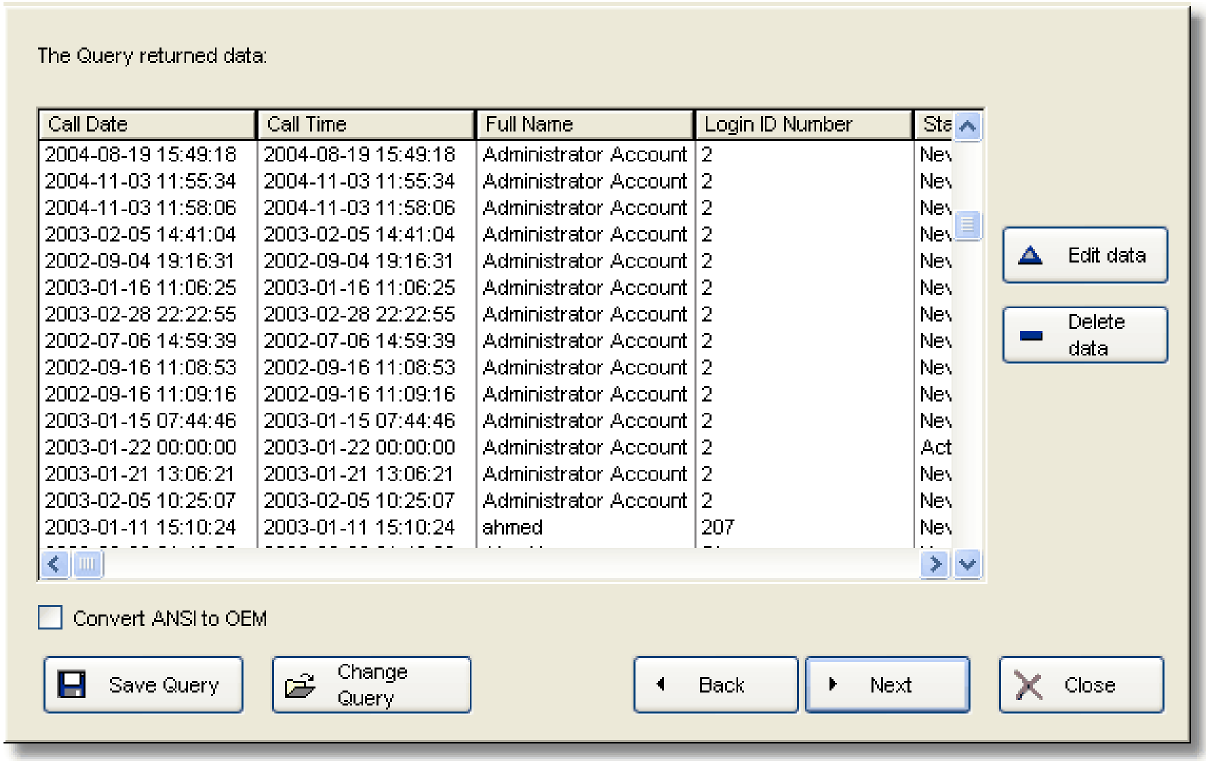
After choosing the type of import file from the drop down list, you will click the button with ... to select the filename.



Next, click the arrow pointing to the right to add the table or fields from the left column.



The next couple of screens just let you filter the data before importing or sort the data before it is imported.



The next screen shows the data as it is about to be imported. When finished the initial browse screen will be displayed with your imported records. You can't edit the data here, just close the form and open the screen to browse the file you imported.

NOTE: In some cases you data may not have a separate date and time field. If both these items are in the same field, just assign the same field to both the call date and call time on the right side.

3.2 Report Wizard

The report wizard let's you create your own simple reports.

When you launch the report wizard, you will see a list of reports you have already created and buttons on the right to let you:

1) Create a New Report

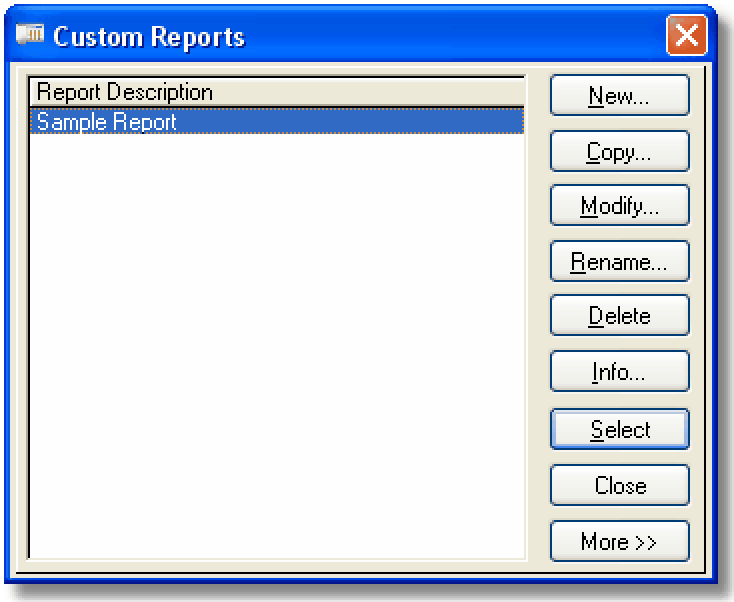
2) Copy the selected report, perhaps to use it as the basis for a new but similar report

3) Modify the selected report

4) Rename the selected Report

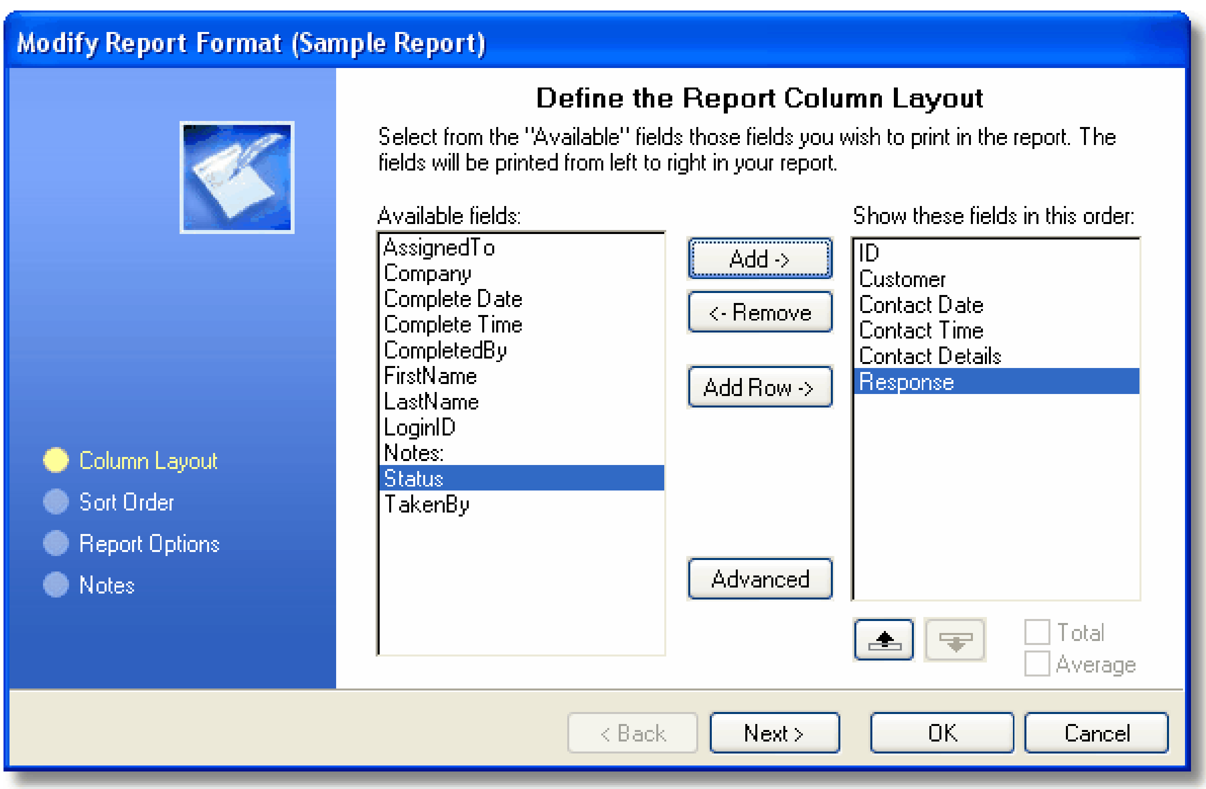
or

5) Delete the selected report



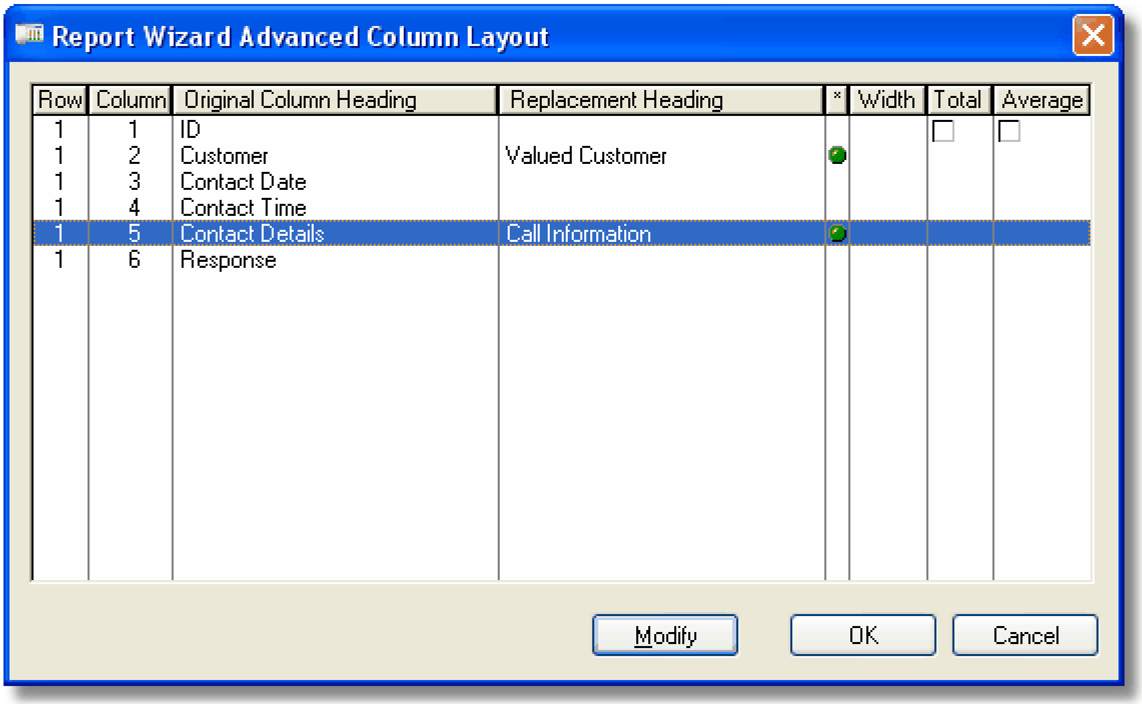
When you choose the New report button the first step is to give your report a name.

Next you select the fields on the left side that you want to print on the report and click the Add button to move the field to the right side of the screen. You can use up and down arrows to change the order the fields will appear Top to Bottom is Left to Right on the report.

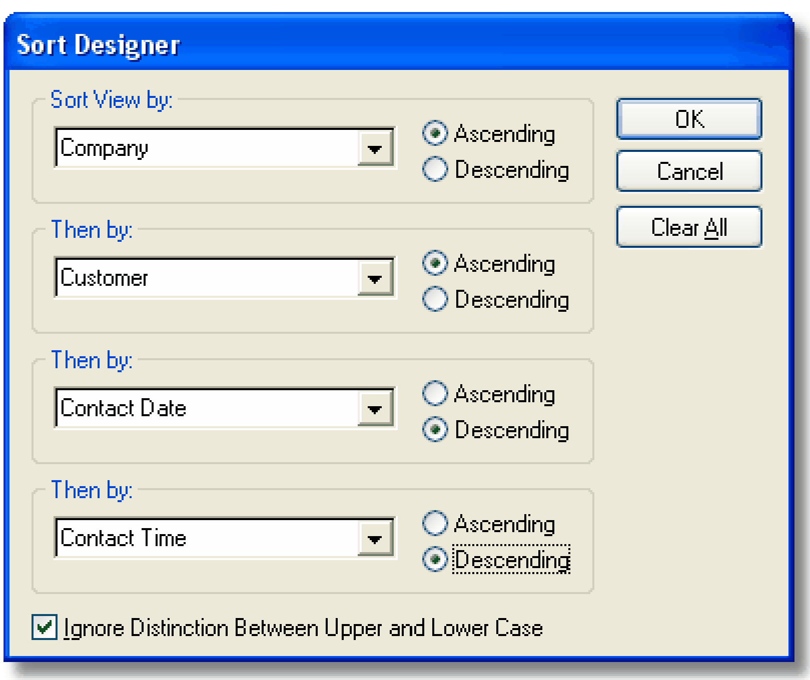


If you want to have more than one row for each record you can click the Add Row button and add fields to that row.

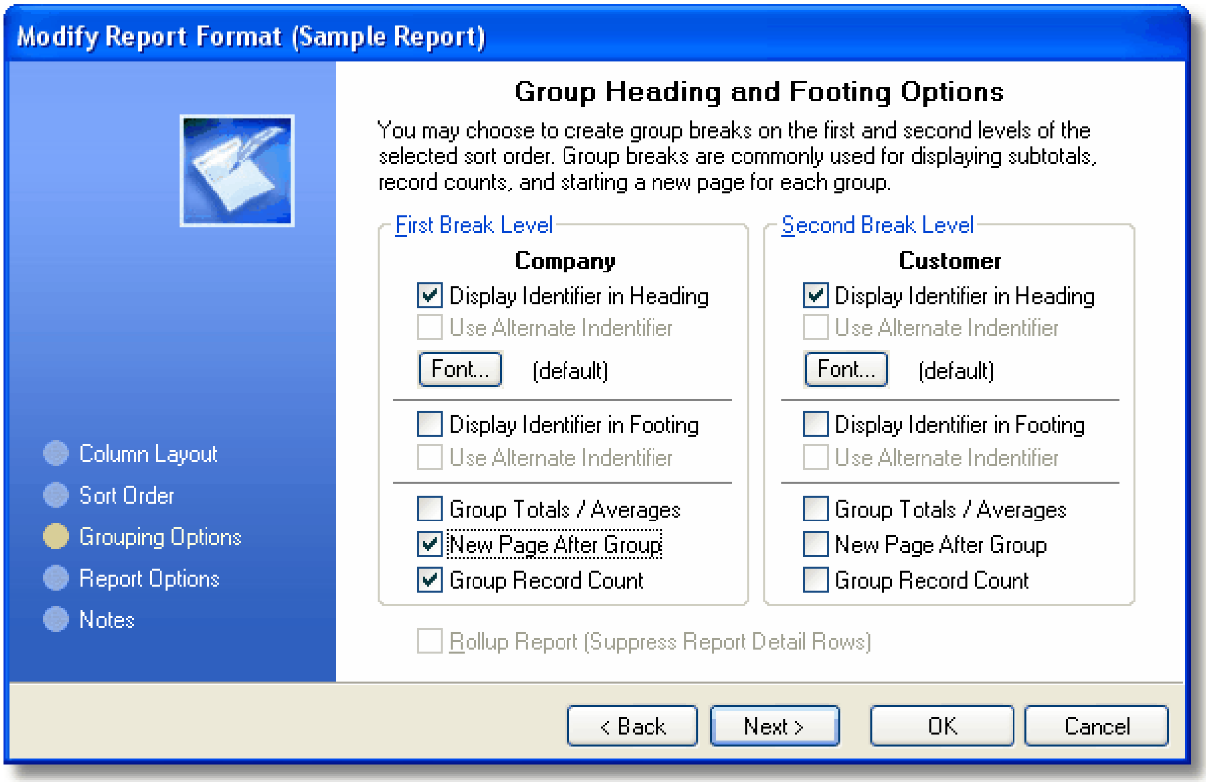
Clicking the Advanced button will let you apply special formatting to each field, column heading as well as data, and change the column heading.

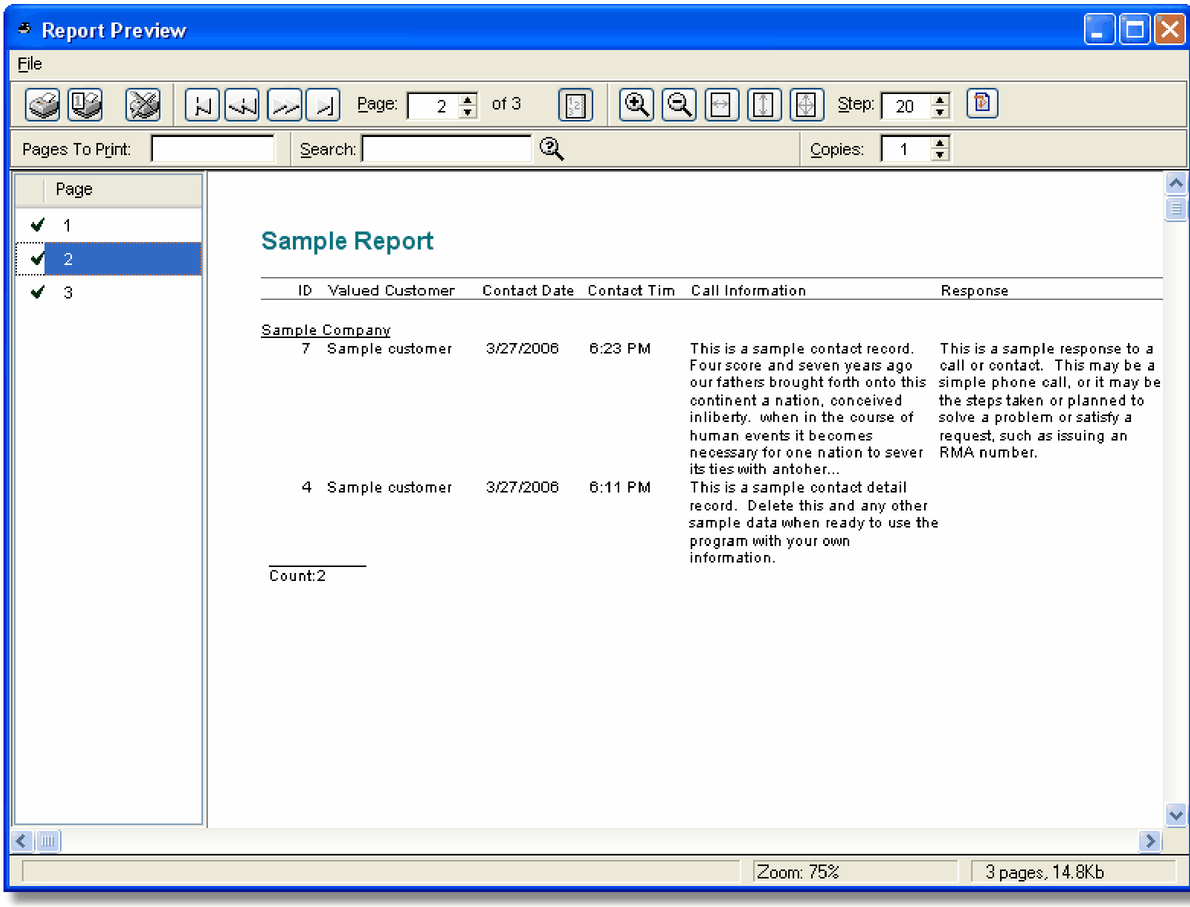


You can then select the order you want record printed. You may use the default sort order, one of several predefined orders, or define your own sort order which can sort on multiple fields.



You can also choose to group your report on up two sort levels and include totals and record counts.





I hope you find the report wizard to be an easy to use reporting option.

3.3 Query Wizard

The Query Wizard is used for most browse screens and reports to allow you to easily filter data to meet multiple criteria you create. Queries maybe created for one time use, or saved and used whenever needed.

Query Wizard makes it possible to...

customize access to your data through the use of an intuitive wizard driven interface. With Query Wizard you may quickly create and save customized queries then re-use those queries at any time.

Components of a Query

By definition, a query is much the same as a question. In the case of database queries, a user is asking their database a question. Computer programs use languages that we, as humans do not ordinarily use in our daily lives. In this case Query Wizard acts as our interpreter. The Query Wizard interpreter allows questions to be asked in a language that both the user and their database will understand.

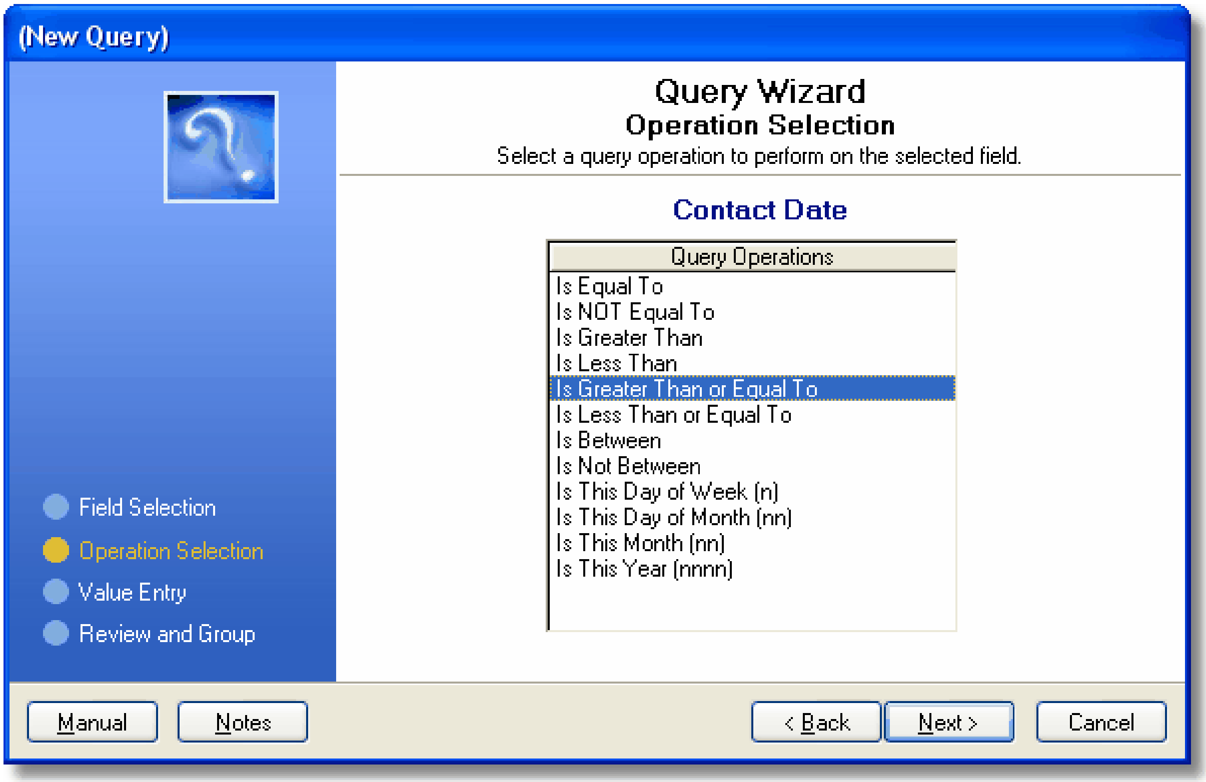
Each Query may consist of one or more questions, logically connected with an AND or an OR logical operator. In order to complete a valid "computer" question Query Wizard must collect three components of information: Field, Operator and Value. Given these three components, Query Wizard will construct a meaningful question.

Field

The Field is generally representative of information contained within in the database for which the developer has made available. The field is therefore considered the subject of the question or what you would like to learn about. A few examples of fields would be Account Balance, Last Name or Zip Code.

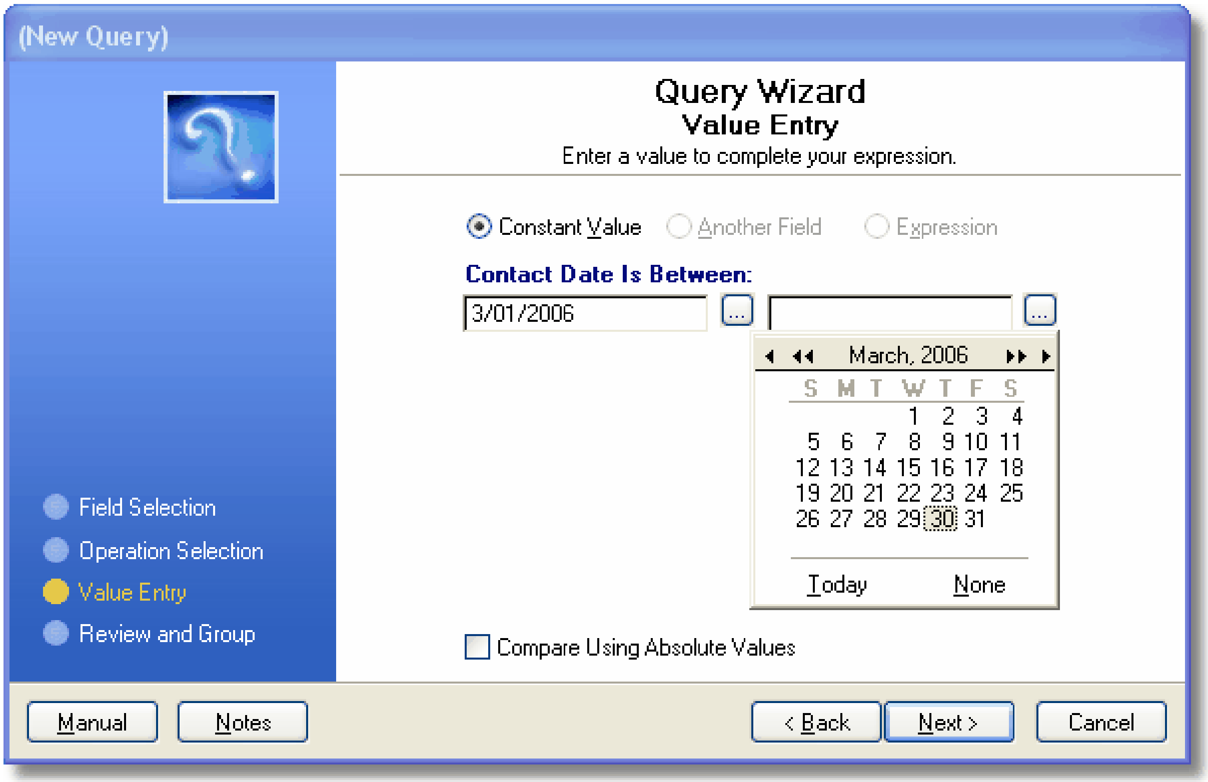
Operator

The Operator represents the comparison to be made between the Field and Value. Due to the nature of the value, operator selections for numbers are limited when compared to those for text. For example the most common numeric operators are Greater Than, Less Than or Equal To. The nature of text operators allow for such comparisons as Contains and Begins With.



Value

The Value will be compared (via the operator) to the field in your database. The value entry is the way you wish to describe the subject (field) of the question. In essence the value describes the trait the field should have (or not have). Query Wizard offers many useful features to assist the user with their value consideration.



To select an operator, simply highlight the desired operator and press the Next button.

Common Operators (both numeric and text)

· Equal To

The field and the value must have the same value.

· Greater Than

The field must be greater than the value.

· Less Than

The field must be less than the value.

Text Operators

· Begins With

The field must begin with the value.

· Contains

The field must contain the value at any position within the text.

Value Entry

This dialog is the last step and is used to collect the value component of the query. This value will be compared (via the operator) to the field in your database. In essence the value describes the trait the field should have (or not have).

When the value entry has been completed simply press the Next button continue.

Case Sensitivity and Absolute Power

Query Wizard offers many useful features to assist the user with their value consideration. Two examples are Case Sensitivity and Absolute Value. Case sensitivity may be invoked if the selected field is a string while absolute values may be compared when the field is numeric.

Types of Values (constant, another field, expression)

· Constant Value

This option allows the user to type the value directly into Query Wizard. As illustrated above, this is the default option and would normally be used with most queries.

The appearance of an ellipses button adjacent to the value entry field indicates the developer has provided a friendly lookup to assist with selecting a value for this entry.

When the field being queried is a date field the ellipses will call the built-in drop-down calendar.

· Another Field

This option is quite useful for comparing two existing database elements. This selection may be made from a list of fields identical to those in the first Query Wizard step. The actual value of this field will be used for comparison to the field selected in step one.

· Expression

This is an advanced option which requires a limited knowledge of the underlying computer language. Although more complex, when used in the appropriate context this can be a very powerful feature. This expression should return a value to be used for comparison to the field selected in step one.

I hope you will find the Query Wizard makes it easy for you to filter data for on screen review or reports.

4 Web Interface

4.1 MGCS 2006 Web Pages

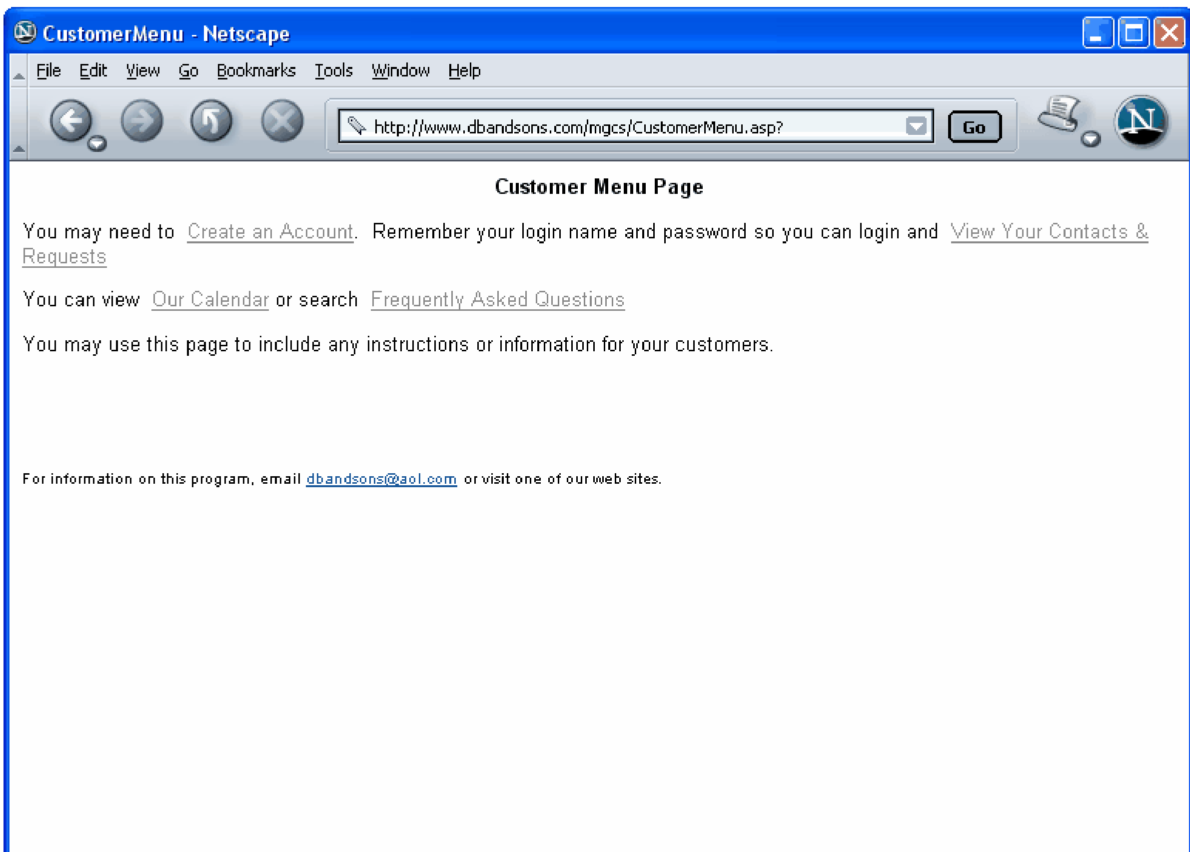
The web page interface provided with MGCS 2006 is expected to run on Microsoft IIS which is included with Windows 2000 and XP Professional Editions but may not be installed by default. If not, you will need your CD and use the Add/Remove Programs applet in the Control Panel, Add/Remove Windows components and have your CD ready. If IIS is already installed the main thing you will need to do is to insure proper permissions are set for the Internet Guest Account (IUSR_machinename) which will need read/write access to the folder containing the .mdb file.

You may be most familiar with web sites that use just .html files, but the web page interface uses a

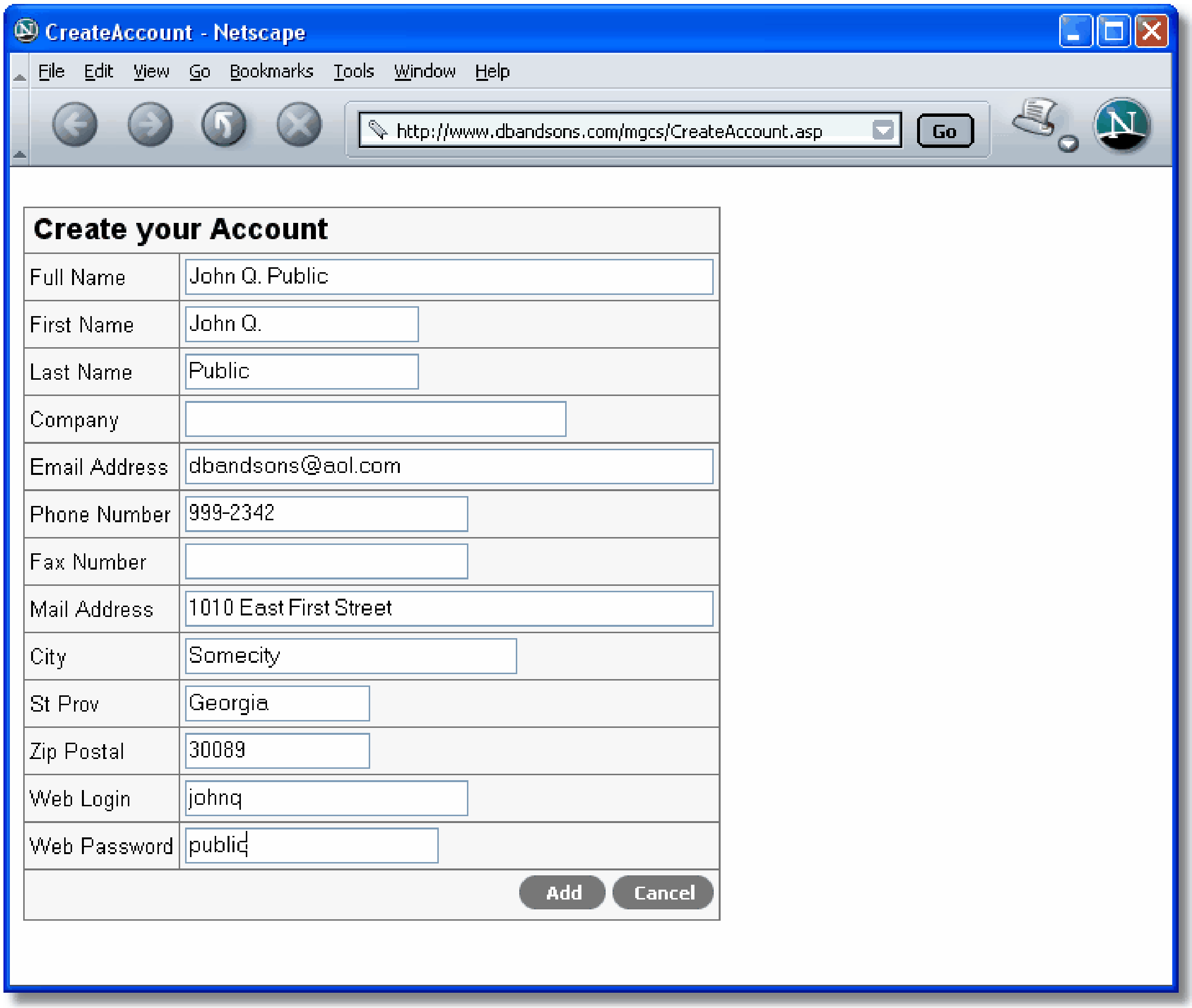
combination of .asp (active server pages) and .html (hyper text markup language) files. The main thing to remember is the .asp file is what you will view in the browser. The .html files are a template or pattern for using when the corresponding .asp file is browsed. The web page interface includes a number of "styles" or themes, color and font and image combinations. You can specify which style to use by appending either a ? or a & and the style name. For example:
http://www.dbandsons.com/mgcs/Contacts_List.asp?style=pine
If as in the next example url the ? has already been used, precede style with &
http://www.dbandsons.com/mgcs/Contacts_maint.asp?ID=10&style=innovation

You can change the default style by editing the common.asp file. I always recommend using a plain text editor like notepad.exe for editing the .asp files. You may also need to edit the common.asp file to change the SERVER URL line - http://yourserver/ or http://yourserveripaddress - and if your .mdb file is not located in c:\inetpub\wwwroot\db you would need to edit the common.asp file to point to the correct folder.

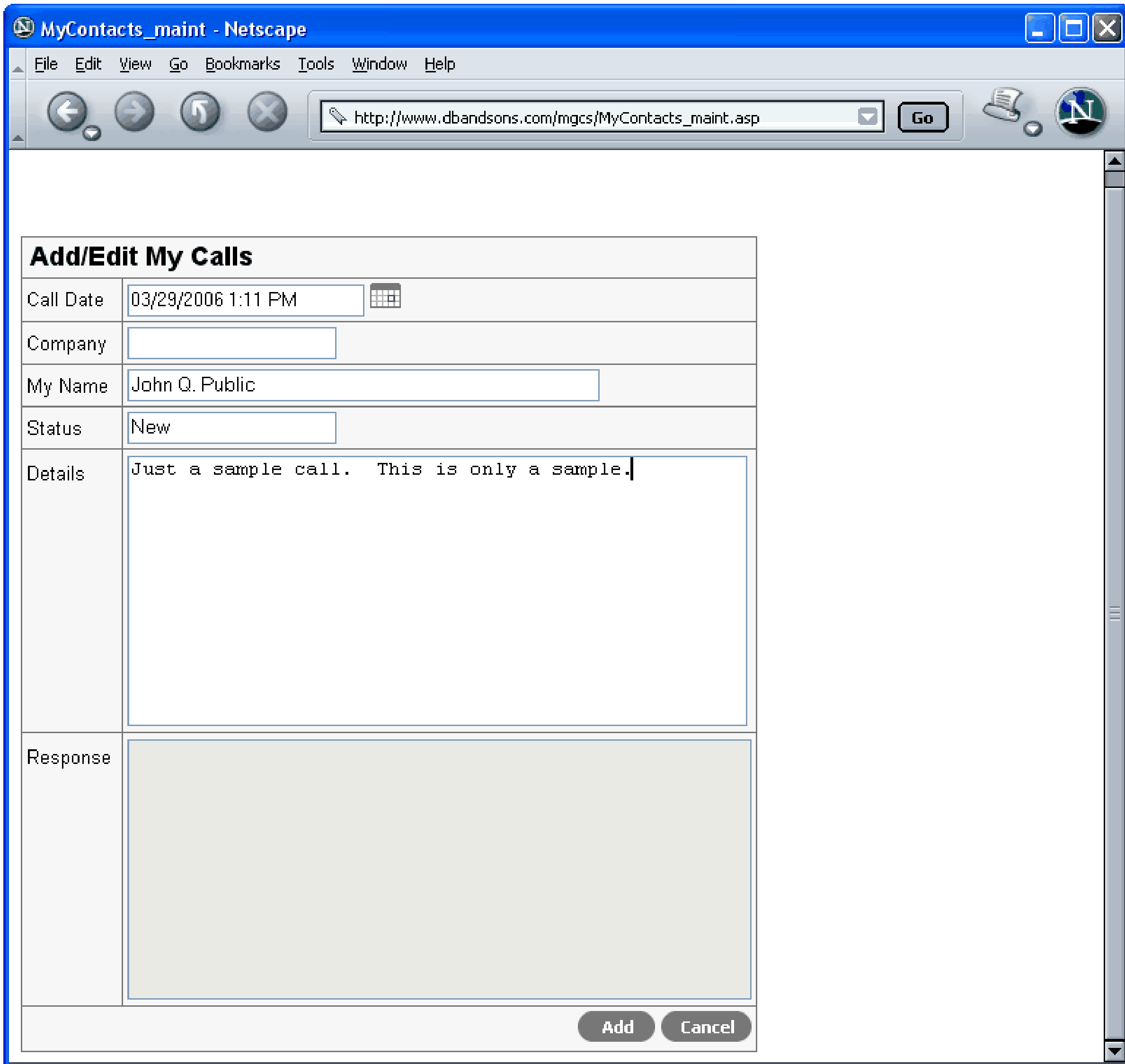
I have provided a page with a new items that might be useful for your customers. If you like, they can create their own account. If you want to instead email them with web login names and password after you have created a record in the database for them, you may want to delete the Create an Account Link. Changes like this would be made to the .html page and when the corresponding .asp page is browsed your change would be reflected. If you do allow them to create their own account, after doing so they will be returned to this menu page. When they then click the link to view their contacts (or calls) they will be prompted for login information. I have also included links to let them view your calendar - maybe you will use this to show when your office may be closed or on holiday or for special events or so on. If you choose you can delete that link as well. I have also provided a link to the Frequently Asked Questions page.



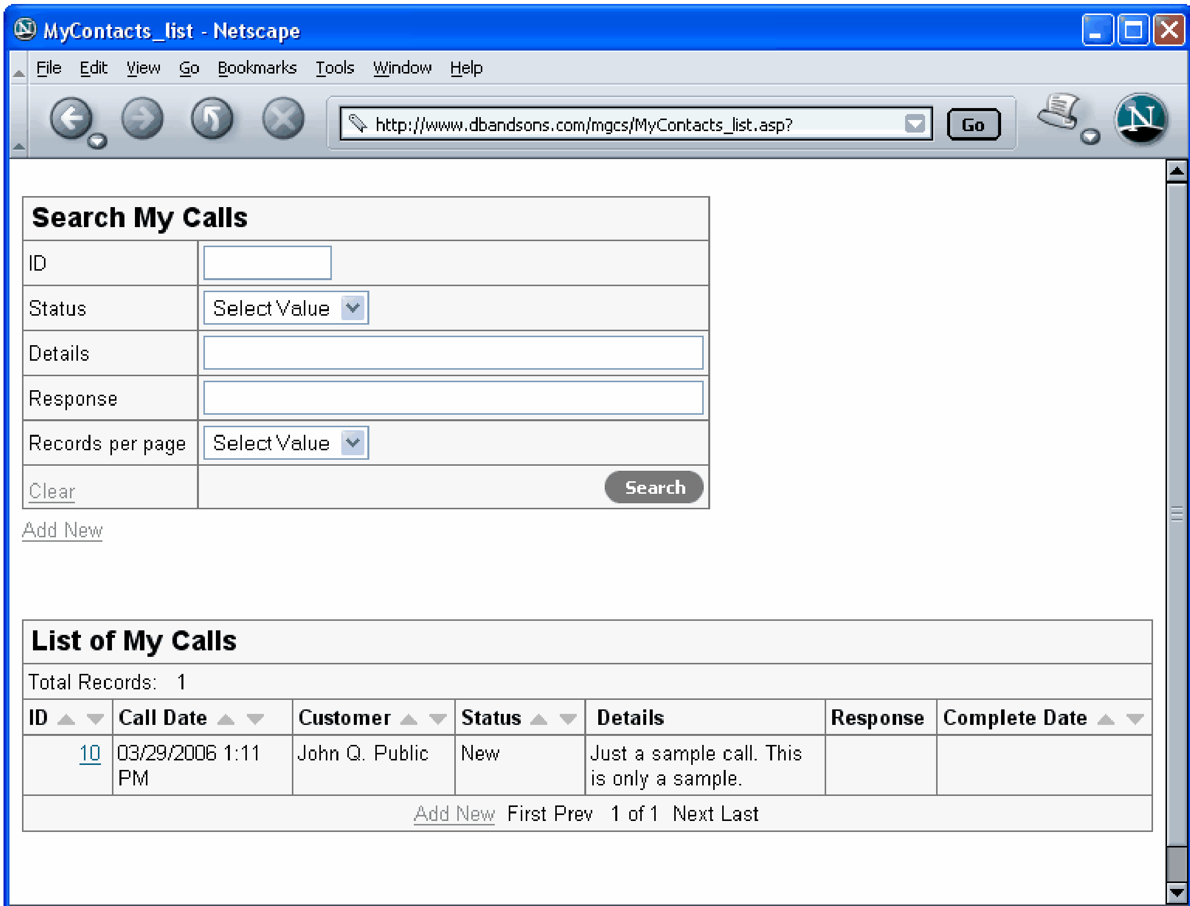
The screen shot below shows what the customer would see when setting up their own account. Most fields are not required.



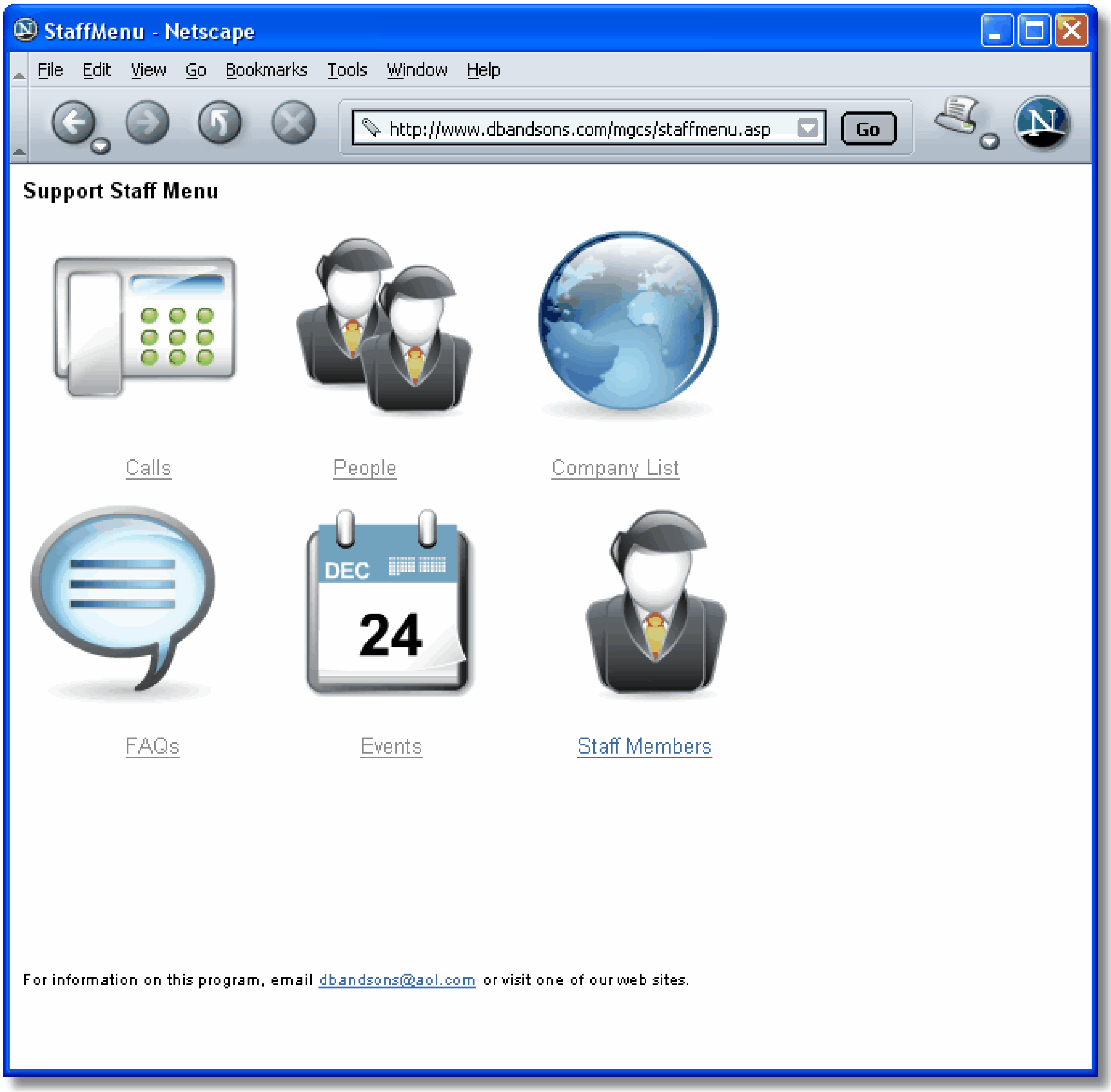
The screen below shows what the user would see when adding a call, or request. The Call Date (and time) is filled in automatically. If a company name is associated with the caller record, this would be filled in as well, as would their name. The Status field defaults to New. The Details section is required, while the Response section is read only. After you have updated the call record, there would be some response for them to see.



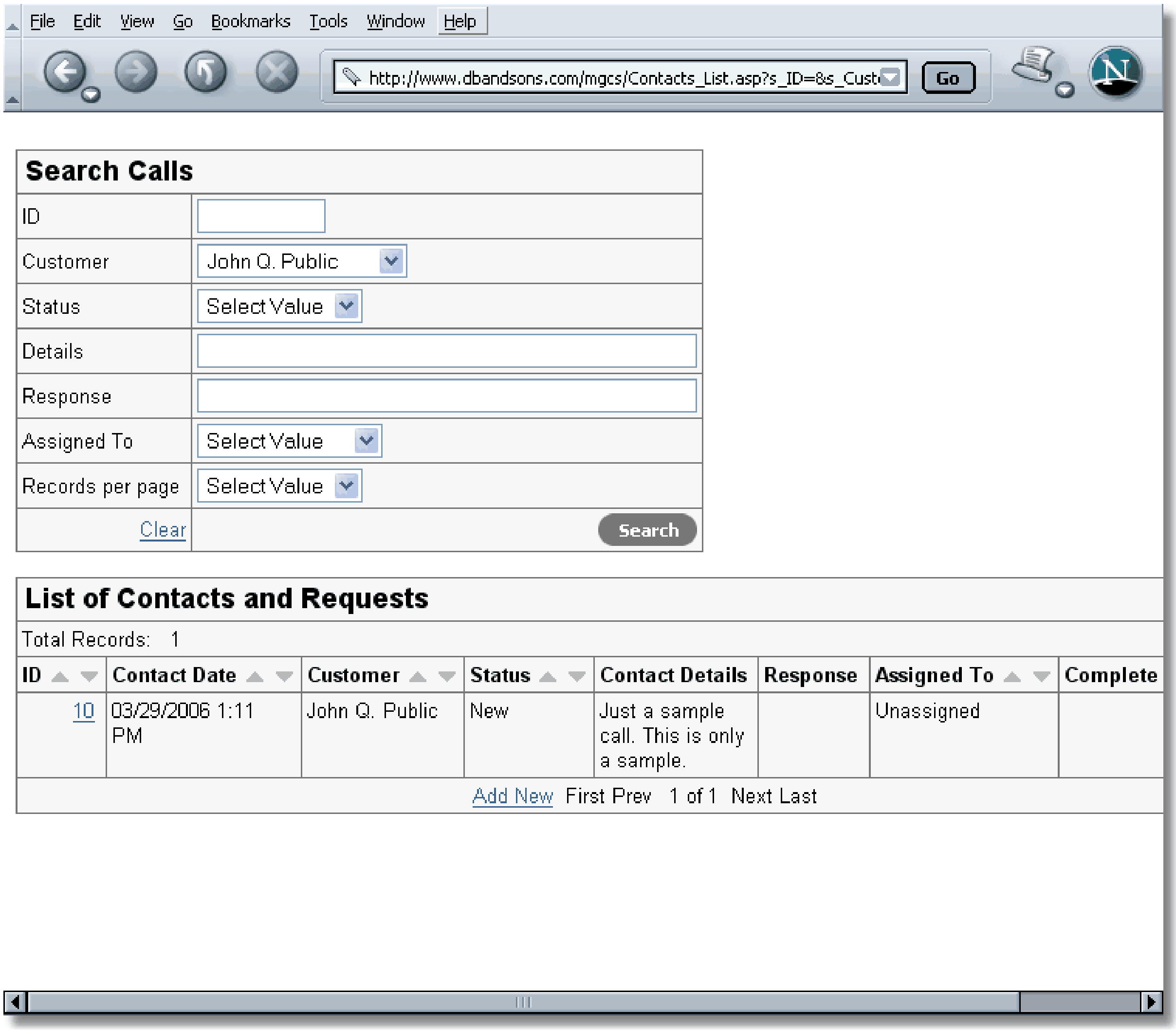
The screen below is available to the Caller to search their call history. They can add a New Call or request by clicking the Add New link under the search box. Clicking the ID link in the table below will let them view the details of the call record.



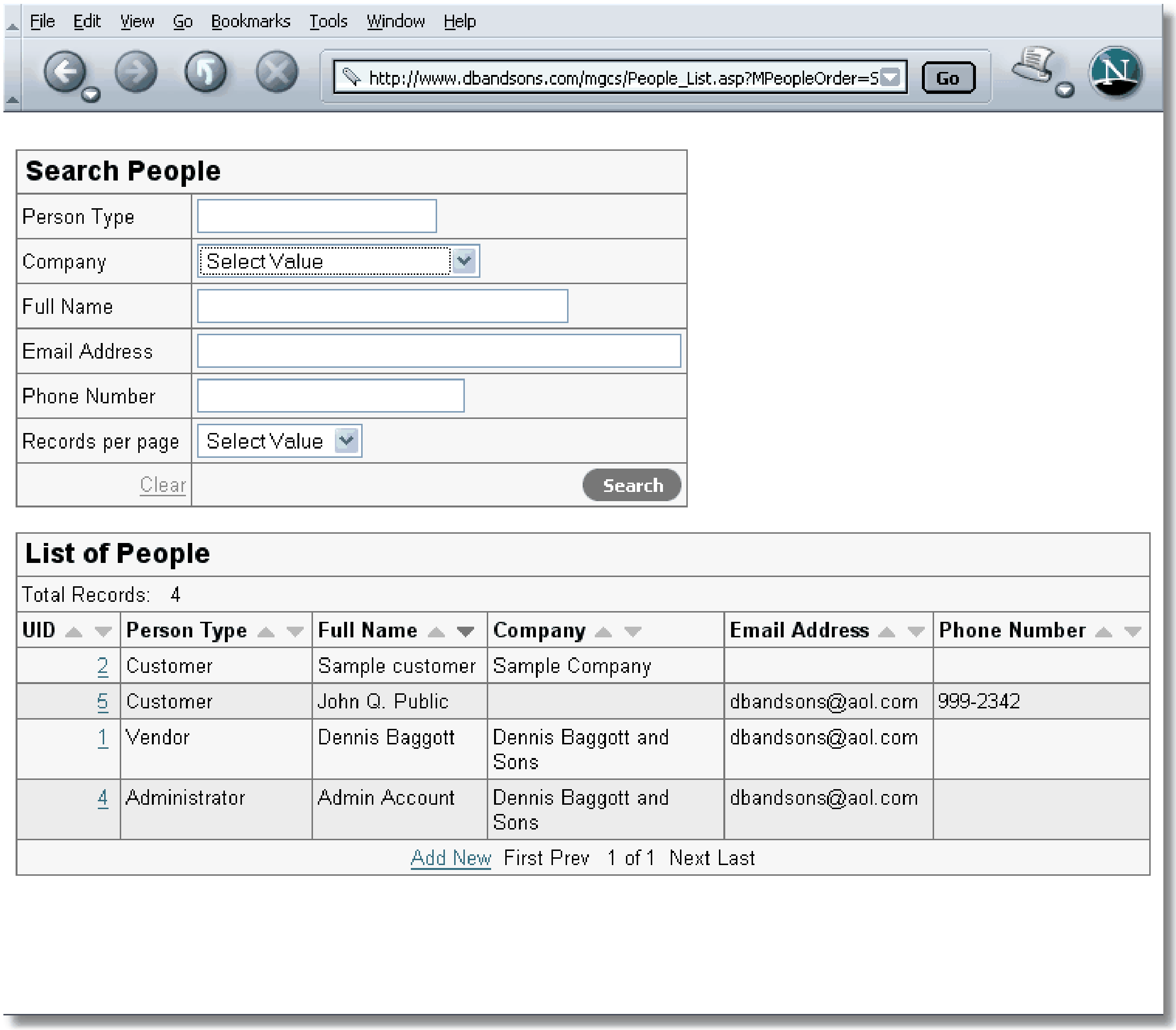
The screen shot below shows the Staff Menu. This is the screen you and your support staff would use most often if you are using the web interface to MGCS 2006.



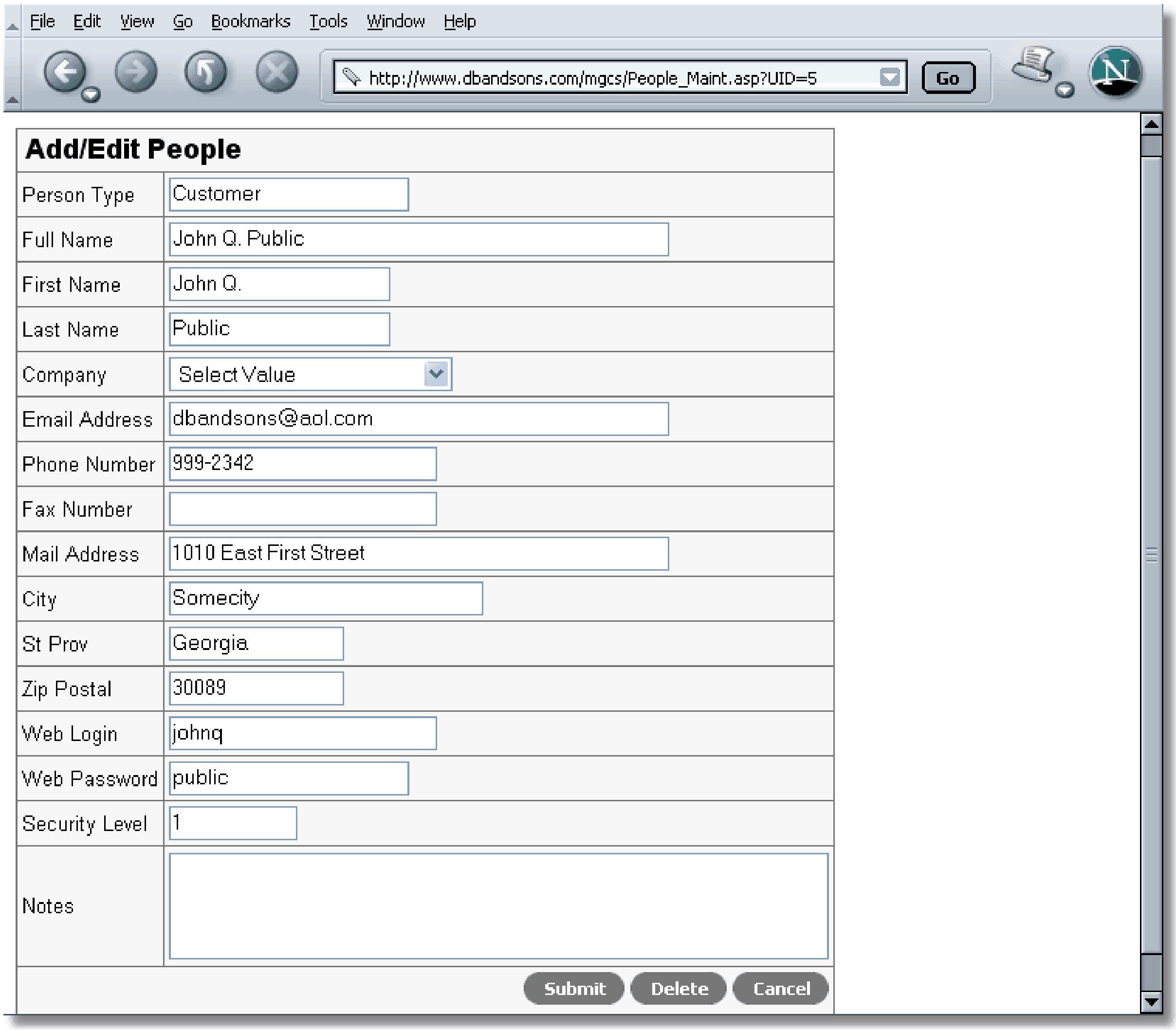
The first link is for calls and would show a list like below. You can enter multiple condition to search for calls, and these are "anded" together. So that if you select more than one criteria to search the database, they must each be true. If any one of the conditions is not met no calls will be displayed. Clicking on an ID link will display details of the selected call.



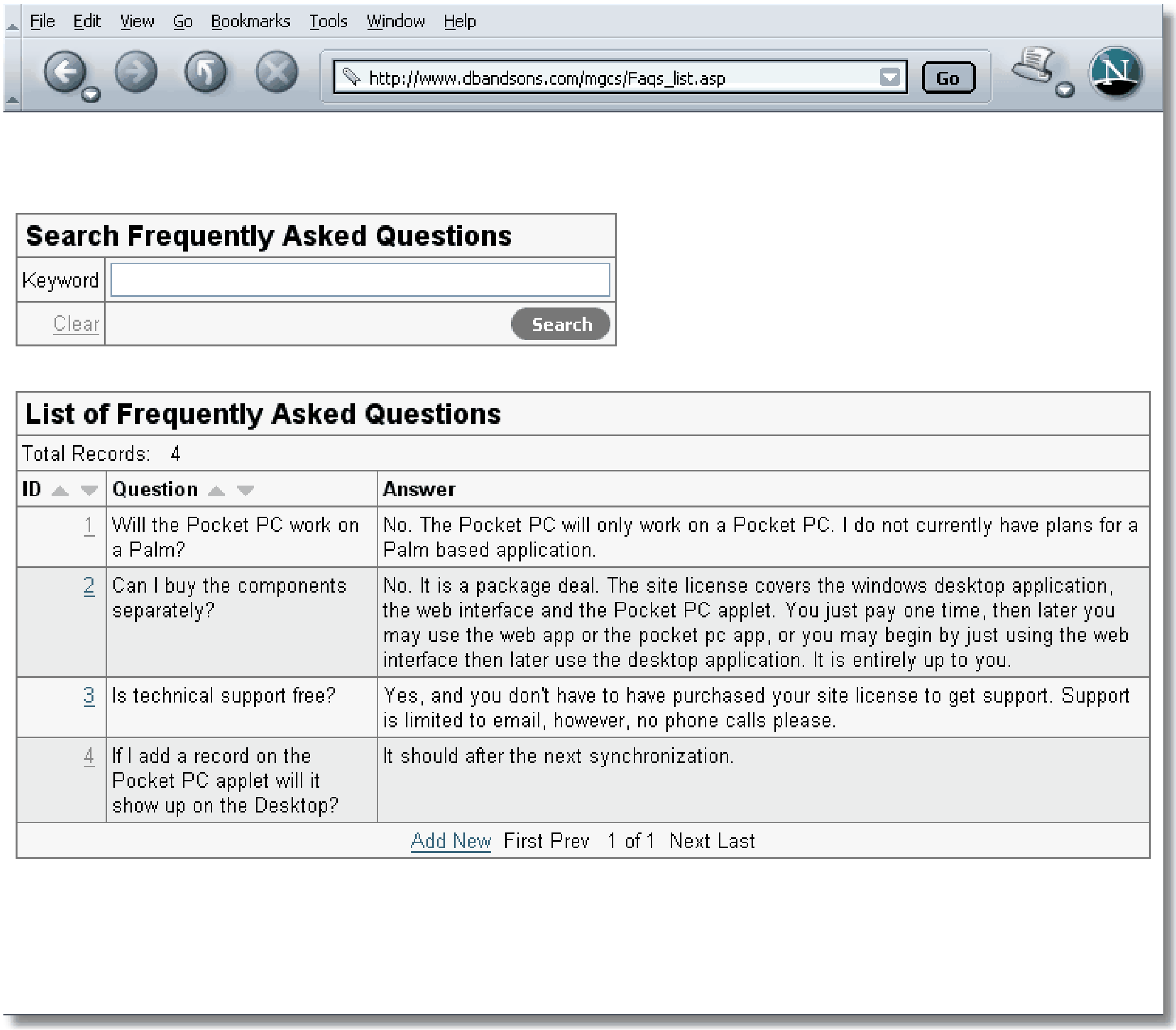
The screen below is used to search and view people records you have created. Clicking on a UID link will show the details for the selected person.



The screen below is used to add People records. Most fields are optional. The Company name would be selected from the drop down list.



The screen below is used to search and view FAQs.



Search Frequently Asked Questions

Keyword	
Clear	Search

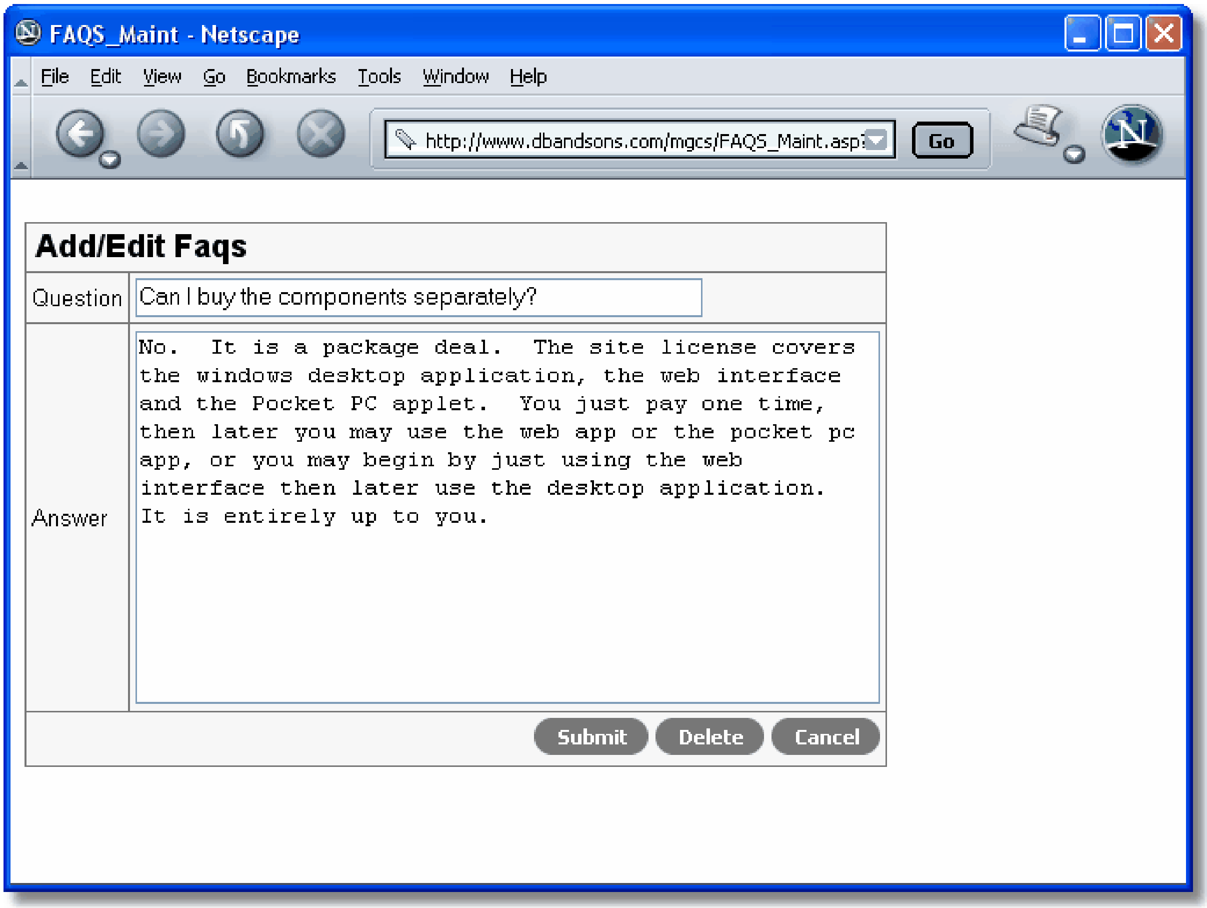
List of Frequently Asked Questions

Total Records: 4

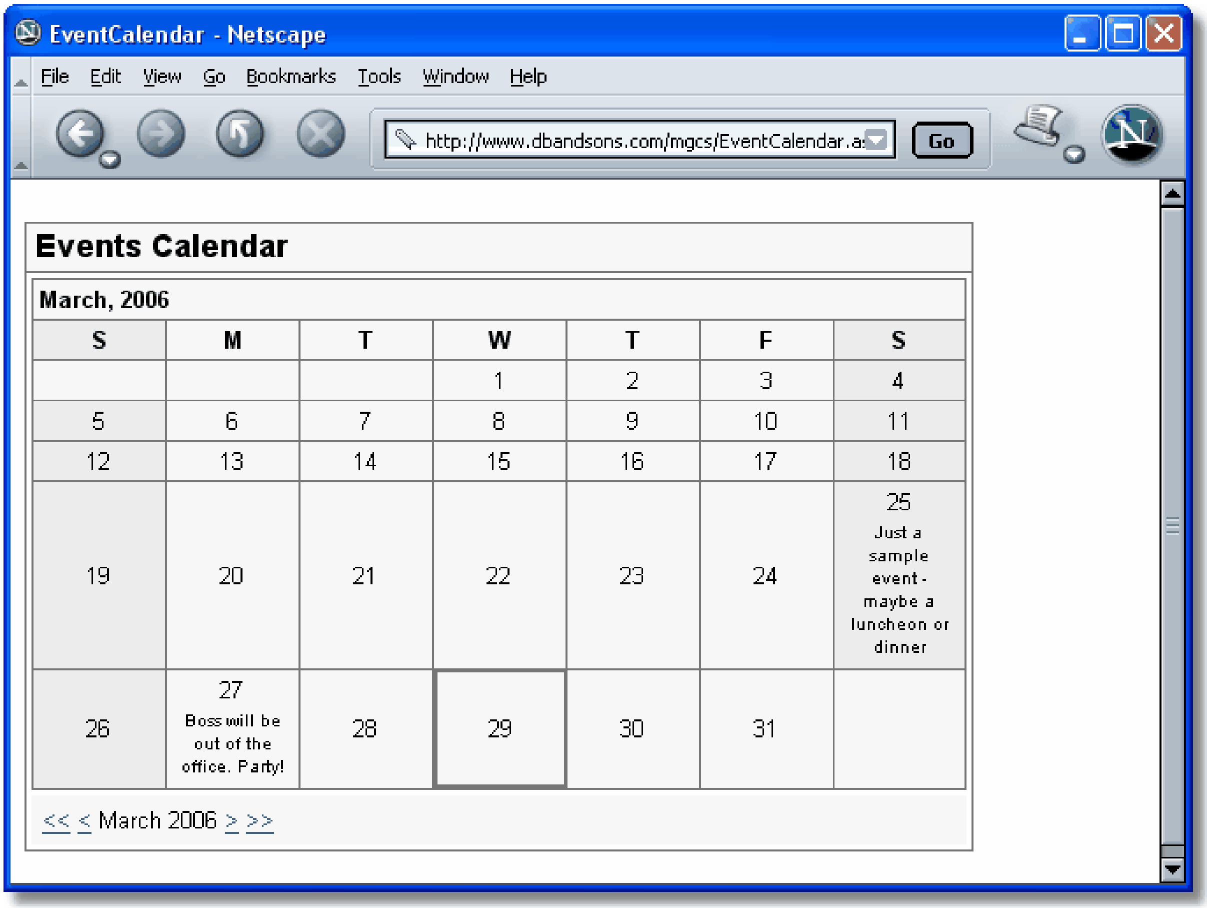
ID	Question	Answer
1	Will the Pocket PC work on a Palm?	No. The Pocket PC will only work on a Pocket PC. I do not currently have plans for a Palm based application.
2	Can I buy the components separately?	No. It is a package deal. The site license covers the windows desktop application, the web interface and the Pocket PC applet. You just pay one time, then later you may use the web app or the pocket pc app, or you may begin by just using the web interface then later use the desktop application. It is entirely up to you.
3	Is technical support free?	Yes, and you don't have to have purchased your site license to get support. Support is limited to email, however, no phone calls please.
4	If I add a record on the Pocket PC applet will it show up on the Desktop?	It should after the next synchronization.

Add New First Prev 1 of 1 Next Last

The screen below is used to view, edit or delete Frequently Asked Questions.



Below is a screen shot of the Events Calendar.

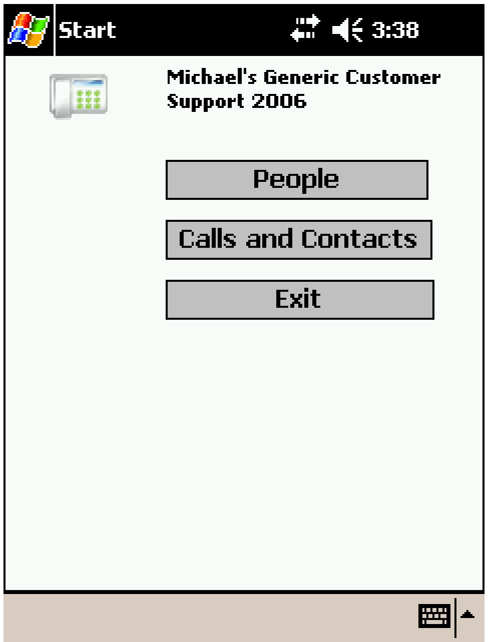


5 PDA Applet

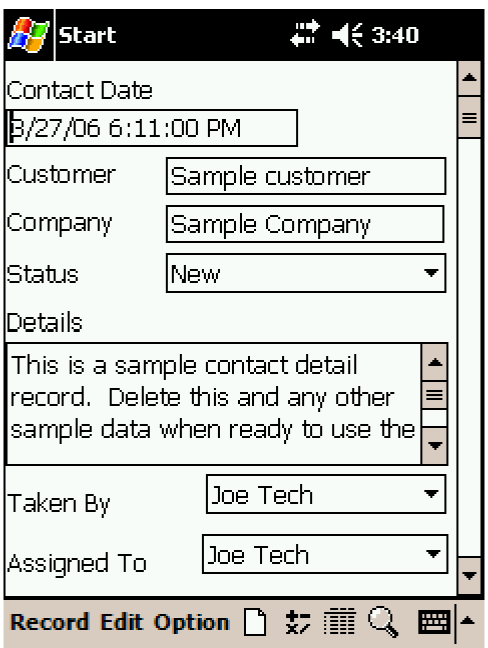
5.1 MGCS 2006 Pocket PC Applet

I have provided a simple Pocket PC based applet (created with Visual CE from http://www.syware.com) which some may find useful. This applet uses the first column in each table of the .mdb file (OID) to keep track of synchronization between the desktop and the Pocket PC. Originally, this numeric field would be a 0 indicating it has not been copied to the Pocket PC. After it has been synced the first time, changes made on the Pocket PC (no additions should be made on the PPC applet, only edits and deletions) will be compared to the file on the desktop at each ActiveSync synchronization and records will be synced automatically.

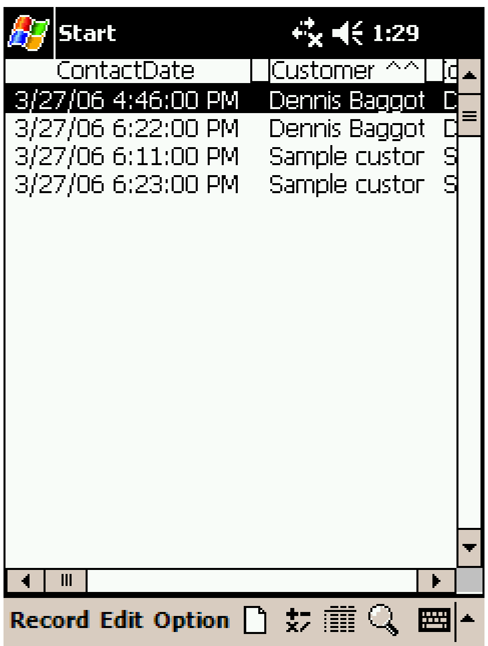
After installing the Pocket PC applet, you will want to remove the PPC from it's cradle then put it back in the cradle to resynchronize the data. Some screen shots are shown below.



This menu screen allows you to switch back and forth to the People screen and Calls screen, and to Exit the applet. The People and Calls screens have a menu button at the bottom to let you return to the menu above.



The screen above shows you a Call record on the Pocket PC. It includes drop down list boxes for quickly changing certain fields from look up tables. The menu at the bottom of the screen has a Record option which will let you navigate between records. There is also an Options menu which includes a Filter option to let you filter data displayed. There is also a list style icon that will let you switch from the record at a time view, shown above, to a list view shown below. Clicking any line in a list view will open that record in form view.



I hope some will find this little applet useful, and if you do please email me so I will know you liked it and may include something similar in other applications.