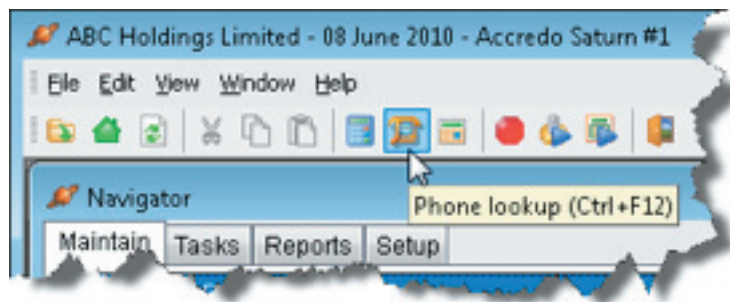


Tips & Tricks

Written by the firm's resident super user, Victoria, Accredo's user tips provide helpful information, short-cuts and general pointers to help customers improve their use of Accredo.

Phone Lookup

We have added a new Phone Lookup button to the Accredo toolbar.



When you use Phone Lookup, Accredo will look up the phone number in a list of all Customer, Creditor, Contacts and Sales Person phone numbers and find the matching record(s) for the phone number you entered. The phone number must be entered exactly as it appears in the record for the transformed phone number so some setup is required to get this working smoothly.

Setting up your Phone Number Transformation Rules

Navigator > Setup > Company > Configuration > Settings > Phone Nos

You can define phone number transformation rules to store a transformed version of your phone numbers for Phone Number Lookup (and TAPI events). The transformed phone number is not visible in Accredo but can be reported on in a phone list.

If you want your phone numbers in Accredo to be formatted in the same way as your transformed phone numbers, Select 'Transform Phone No On Save'. Transformation will happen after you edit and exit a phone number field. →

Transformations

You can add input and output masks to transform phone numbers. Phone number is transformed by the first rule it matches on the input side.

matches any single character in that position

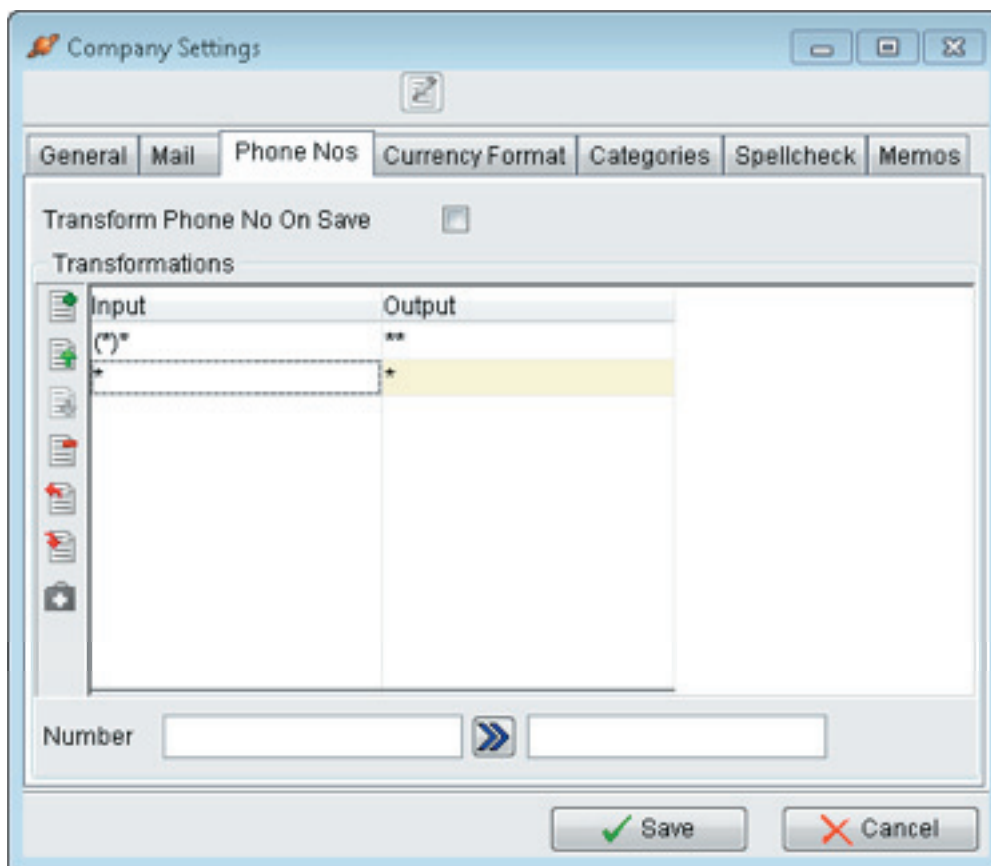
* matches any string of characters

spaces and dashes are ignored

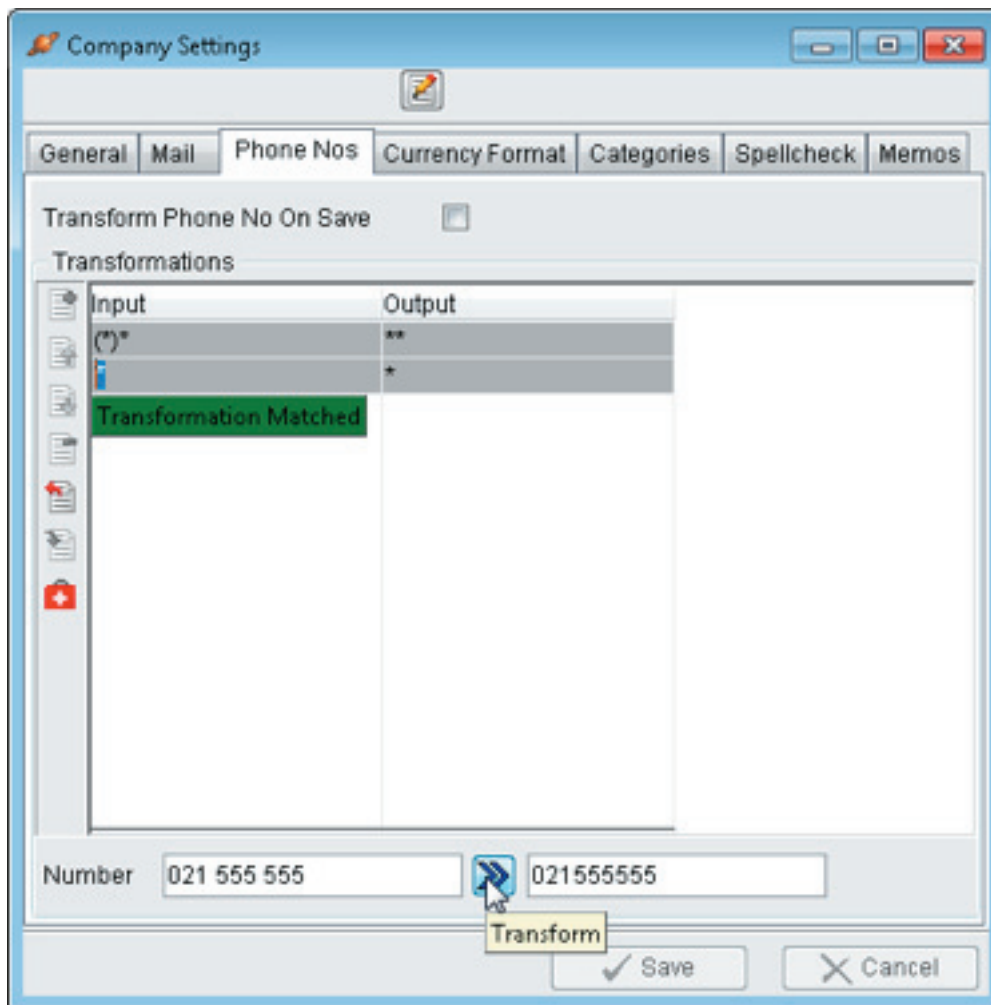
+, (,) are all valid characters

In the below example we will set transformation rules to strip out spaces, dashes and brackets so that when we use phone lookup, we can just key in the phone number digits without having to worry about knowing the format.

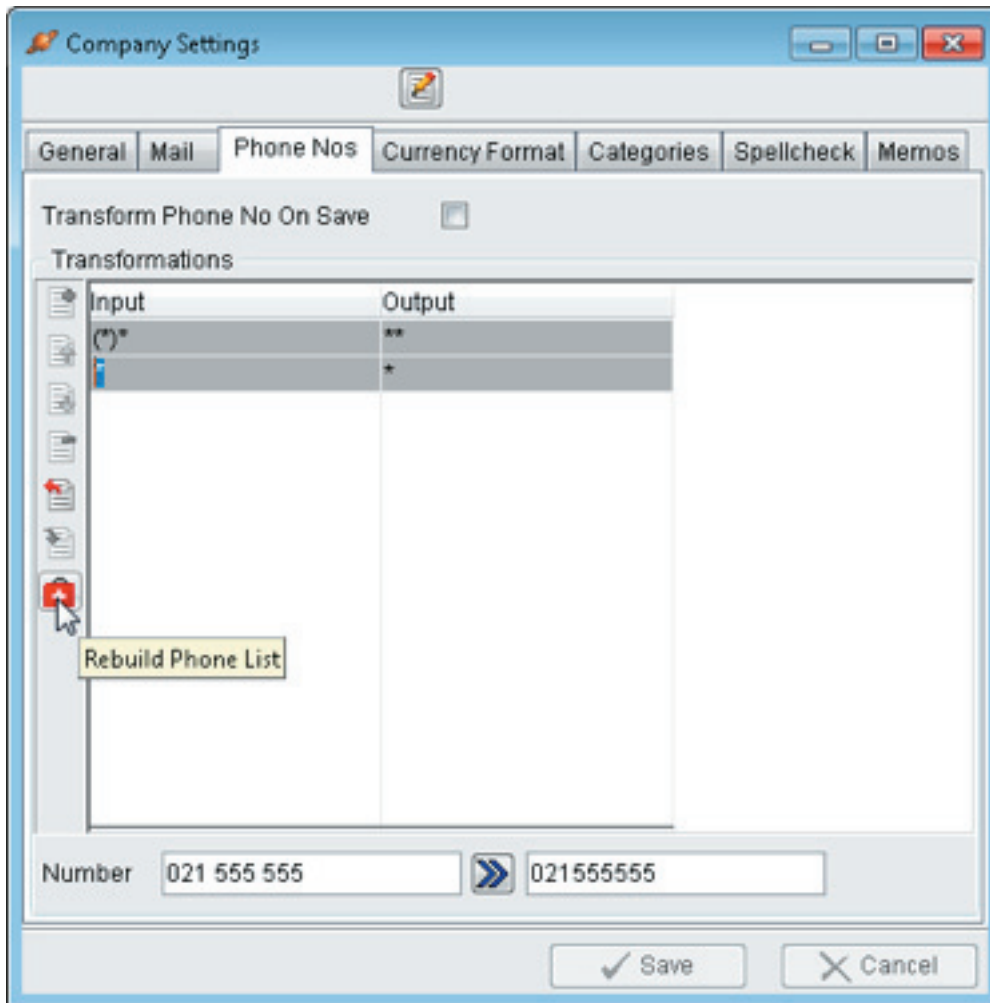
Key the Transformations as shown below then click SAVE.



To test your transformation rules, you can key in a phone number beside 'Number' then click the arrow and the transformed number will display with a status hint of which rule was matched as per below example. If you use international numbers you may require additional transformation rules. →



Click the 'Rebuild Phone List' button to create the transformed numbers. →

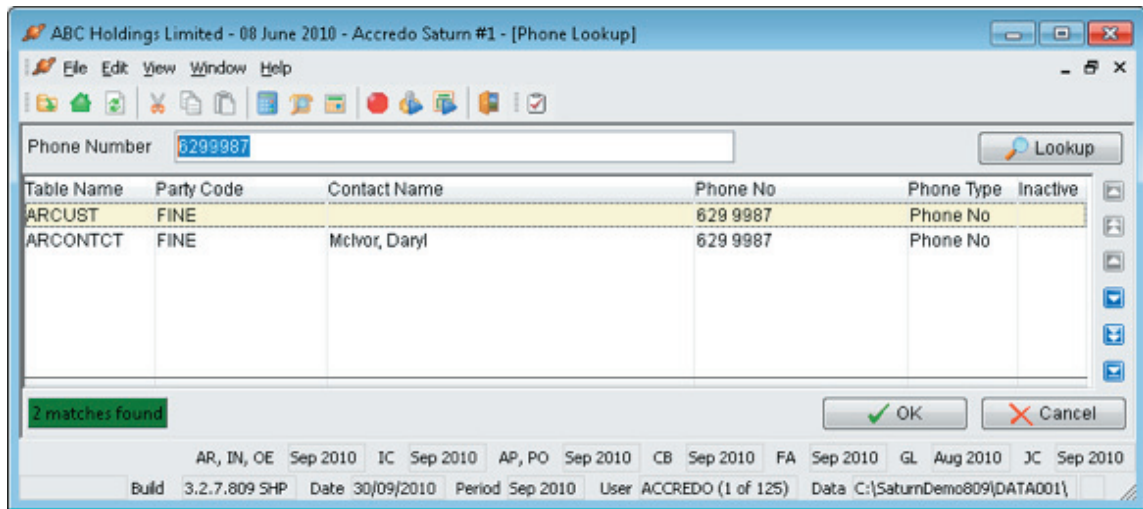


Use your Phone Lookup

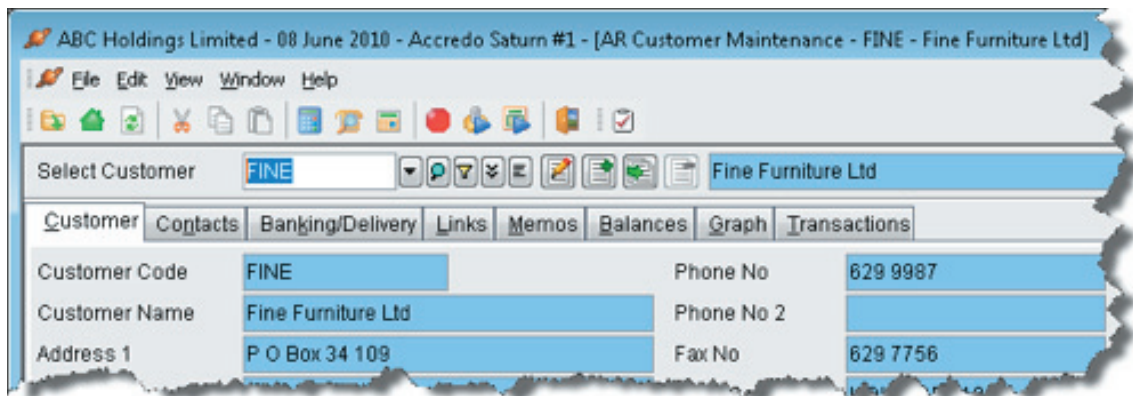
Click the phone lookup button or press CTRL+F12.

Enter the number and click 'Lookup' and all records finding a match for the number will display.

Note: It is the entire phone number or transformed number that is looked up. You cannot key in part of the number. →



You can then go straight to the desired masterfile by double clicking it. →



Phone List Report

Navigator > Reports > Company > Phone List Reports > Add Layout > Phone List

You can add one or more Phone List Report Layouts to report phone numbers for Customers, Creditors, Contacts and Sales People.



→

You may want to tick the 'Transformed No' field so this will display on the report.

Customise Layout - Phone List

Layout Name: Phone List Report

Sort Order: 10

Report Title: Phone List Report

Phone List Preferences Users

Filter/Sort

Field Name	Visible	Display Label	Width	Group Total	B
TableName	<input checked="" type="checkbox"/>	Table Name	8		
PhoneType	<input checked="" type="checkbox"/>	Phone Type	12		
PartyCode	<input checked="" type="checkbox"/>	Party Code	16		
PartyName	<input checked="" type="checkbox"/>	Party Name	35		
ContactName	<input checked="" type="checkbox"/>	Contact Name	35		
PhoneNo	<input checked="" type="checkbox"/>	Phone No	20		
ContactID	<input checked="" type="checkbox"/>	Contact ID	10		
Inactive	<input type="checkbox"/>	Inactive	3		
TransformedNo	<input checked="" type="checkbox"/>	Transformed No	20		

Save Cancel One Time

Click 'Save' to Save the layout, then run the report for all or selected Parties. In the example below, I have run it for customers. →

Company - Phone List Report
 ABC Holdings Limited - 08 June 2010

30/09/2010
 Page 1 of 1

Parties: Customers

Table Name	Phone Type	Party Code	Party Name	Contact Name	Phone No	Transformed No
ARCUST	Phone No	CHESTER	Chesterfield Fine Furniture Ltd		(61) 2 313 48871	61231348871
ARCUST	Fax No	CHESTER	Chesterfield Fine Furniture Ltd		(61) 2 313 46781	61231346781
ARCUST	Phone No	BROWN	John Browns Furnishings		0-3-4255647	034255647
ARCUST	Fax No	BROWN	John Browns Furnishings		0-3-4255647	034255647
ARCUST	Fax No	SMITH	Smith & Son		0-3-4523688	034523688
ARCUST	Phone No	SMITH	Smith & Son		0-3-4564234	034564234
ARCUST	Fax No	JONESCH	Jones & Co. Furniture (CHCH) Ltd		0-3-465 4097	034654097
ARCUST	Phone No	JONESCH	Jones & Co. Furniture (CHCH) Ltd		0-3-465 4098	034654098
ARCUST	Phone No	DUGG	Robin Dugg Interior Design Ltd		0-3-525 4355	035254355
ARCUST	Fax No	DUGG	Robin Dugg Interior Design Ltd		0-3-525 4356	035254356
ARCUST	Phone No	DALTON	Dalton Furniture Wholesalers		0-3-567 5645	035675645
ARCUST	Fax No	DALTON	Dalton Furniture Wholesalers		0-3-567 5645	035675645
ARCUST	Fax No	JONESWN	Jones & Co. Furniture (WGN) Ltd		0-4-233 5698	042335698
ARCUST	Phone No	JONESWN	Jones & Co. Furniture (WGN) Ltd		0-4-233 5964	042335964
ARCUST	Phone No	BOWEN	Bowen Paint & Paper Ltd		0-4-367 5980	043675980
ARCUST	Fax No	BOWEN	Bowen Paint & Paper Ltd		0-4-367 5989	043675989
ARCUST	Phone No	COLLIER	Collier & Sons Limited		0-4-556 7890	045567890
ARCUST	Phone No	JONESAK	Jones & Co. Furniture (AUCK) Ltd		0-9-373 5000	093735000
ARCUST	Fax No	JONESAK	Jones & Co. Furniture (AUCK) Ltd		0-9-373 5001	093735001
ARCUST	Fax No	ROBINSON	Robinson Natural Wood Furnishings		317 8993	3178993
ARCUST	Phone No	ROBINSON	Robinson Natural Wood Furnishings		317 8998	3178998
ARCUST	Phone No	CARSON	Carson & Sons		523 2219	5232219
ARCUST	Fax No	CARSON	Carson & Sons		523 2278	5232278
ARCUST	Fax No	ASHENG	Asheng Engineering Ltd		546 7900	5467900
ARCUST	Phone No	ASHENG	Asheng Engineering Ltd		546 7908	5467908
ARCUST	Fax No	FINE	Fine Furniture Ltd		629 7756	6297756
ARCUST	Phone No	FINE	Fine Furniture Ltd		629 9987	6299987

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