



User Manual

RC-Soft - Marketing 1.2

Software requirement: ACCESS 2010 or later

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1. Quick Start

- ⇒ Double Click on the Zip File 'RC-Soft Marketing 1.2'
- ⇒ Double Click on the Program 'RC-Soft Marketing 1.2'
- ⇒ In the background, the program will Show a yellow 'read only message' and a Security Warning.
- ⇒ Close the form 'Welcome To RC-Soft!' 
- ⇒ Click on the yellow bar 'Enable Content'
- ⇒ For the second time, Close the form 'Welcome To RC-Soft!' 
- ⇒ Click on the yellow bar 'Save As...'
- ⇒ Name and Save the Program
The program will automatically re-open!
- ⇒ For the third time, Close the form 'Welcome To RC-Soft!' 
- ⇒ Click on the yellow bar 'Enable Content'
- ⇒ Follow the setup procedures

A detailed version of this 'Quick Start' further below '**4. Setup 'RC-Soft Marketing 1.2'**



2. Introduction

RC-Soft Marketing 1.2 is a database, created to support in the main marketing activities. Following a few functions:

- User Control Panel
 - Personal Information
 - Contacts
 - Note Pad
 - Follow-up
 - Follow-up Archive
 - Schedules and Routines
 - Switch User Function
- Customers
 - Address Information
 - Reference relevant data between customer, vendor & user
 - Reference second-level Action/ correspondence with priority functions (Archive, Pending, Proposal)
 - Reports
 - Archives
 - Notes & Reminders
 - Quick-email shortcuts
 - Zoom In Functions
 - Follow-up / Scheduling
 - Customer specific data storage
 - Find Duplicate Customer entries
- Sales & Purchase Items
 - Inventory with text, number and hyperlink formats
 - 21 columns/options for one data string, allowing to enter any combination of product or reference
 - Easy Data Entry with 5 category functions
 - Quick e-mail function
 - Sort abilities



- Reports for filtered Sales or Purchase Items
- Search Engine with over 15 filter options
- Reports of interested parties per category or combination of categories
- Five Sub reports
 - Sales items
 - Sales Interested Leads
 - Sales Archived
 - Purchase Items
 - Purchase Archived
- Vendor Correspondence
 - Address
 - Notes & Reminders
 - Archive
- Bookmark/ Favorites Storage
 - Storage of Favorites with Passwords , Registration Codes, Security Questions, and Other Important Information
 - Built in Web-browser
 - Keyword Search Engine
 - Category
- E-mail Exchanges
 - Bulk e-mail Database, for mail-outs
 - Quick find for erasing invalid e-mails
 - Easy Add e-mails
- Many Help functions
- Export & Import Functions for Bulk Data Exchange of
 - Customers
 - Vendors
 - E-mails
 - Favorites
 - Inventory Items
- .. and more



The concept of this Program is based on Modules.

Main Program: 'RC-Soft Marketing 1.2 '

Compatible, additional programs:

- RC-Soft Marketing 1.2 Assistant
- RC-Soft Marketing 1.2 Favorites
- RC-Soft Marketing 1.2 Network
- Additional, customized Designs on request

This program allows to Login as a 'Single User'.



3. Contents of the Program

The download consist of two components:

- A. RC-Soft Marketing 1.2
- B. User Manual

A. RC-Soft Marketing 1.2

This program does not have to be installed. It can be handled like a typical document, similar to Excel or Word. It can be copied anywhere. To open and close it works like standard documents from Microsoft. Some security questions may be asked, depending on your computer settings.

RC-Soft Marketing 1.2 is a “stand-alone” application.

B. User Manual

The User Manual explains how to setup the programs and how to use them. It is very detailed and should cover the standard possibilities. If besides this documentation more assistance is required, please consult us.

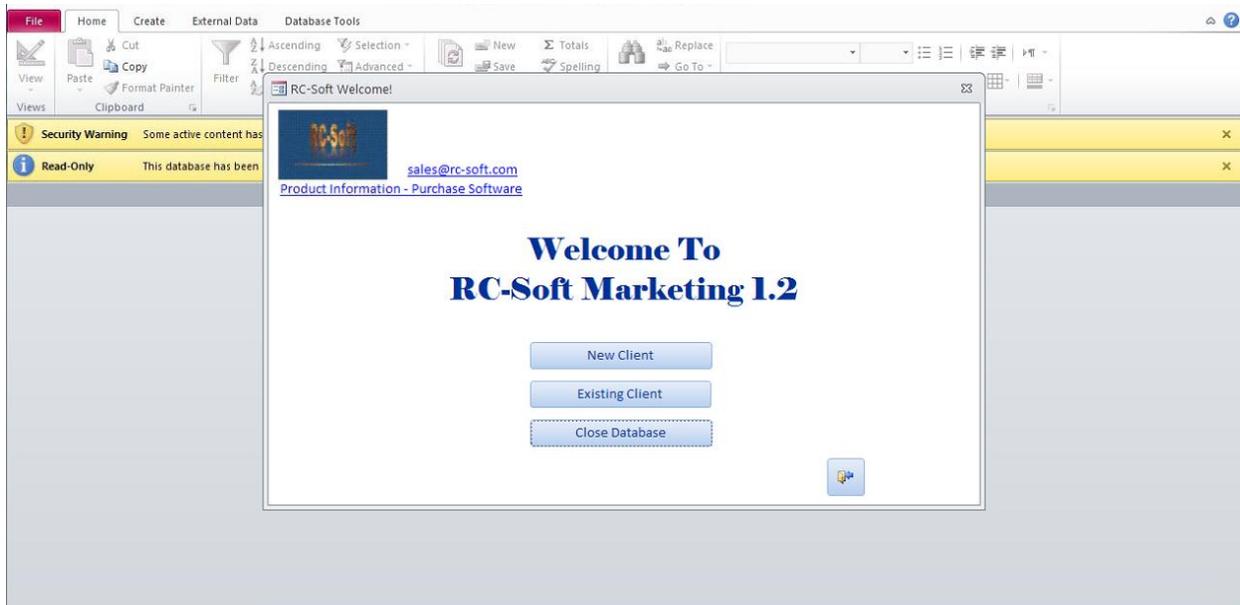


4. Setup 'RC-Soft Marketing 1.2

After Downloading the Software which comes in a ZIP-File,

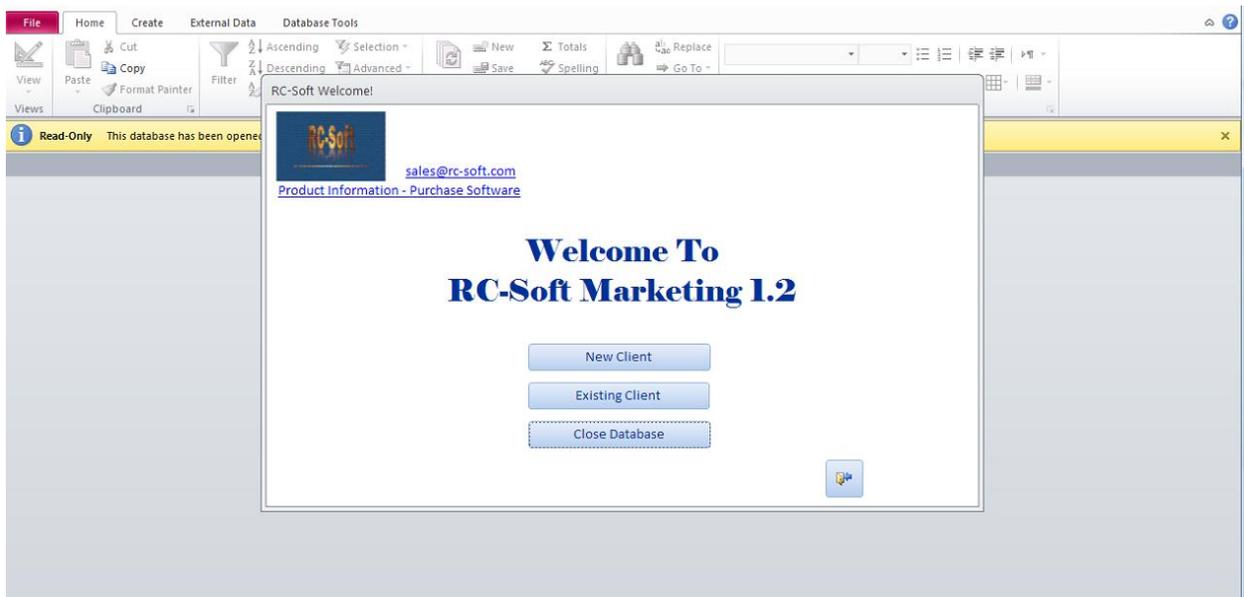
⇒ Extract the zip-file and then open the file 'RC-Soft Marketing 1.2.

Following window appears:



⇒ Close 'Welcome To RC-Soft...' by clicking on this icon





⇒ For the second time, Close 'Welcome To RC-Soft!' by clicking on this icon



⇒ Click 'Save As....' and save the program.

After re-opening the Program, following screen appears:

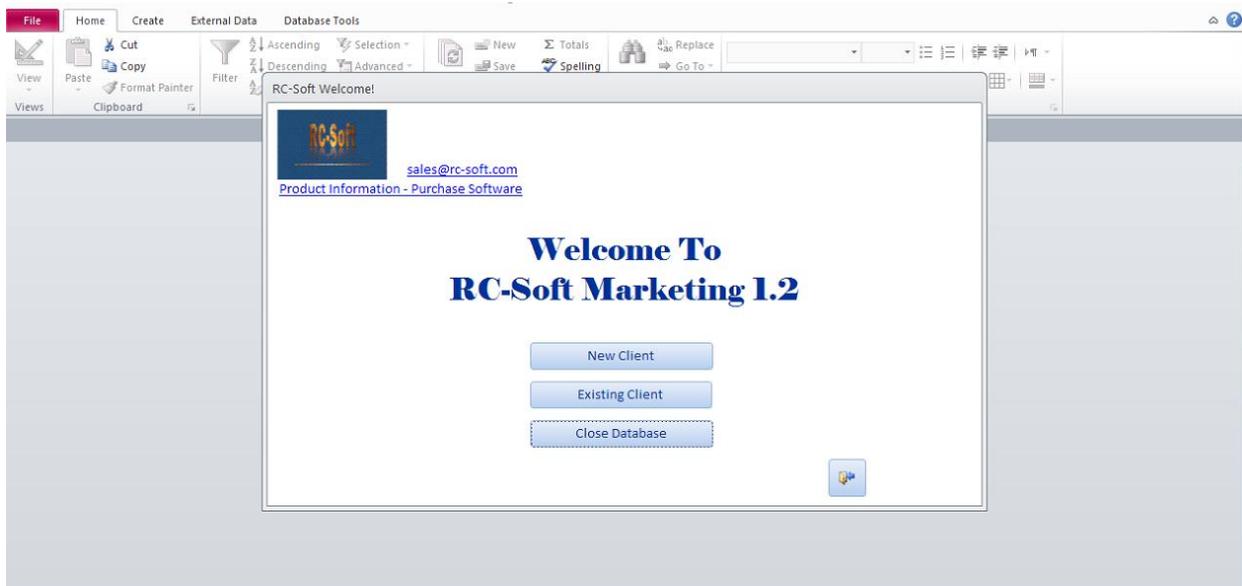


⇒ For the Third Time, Close 'Welcome To RC-Soft,,,,,' by clicking on the bottom

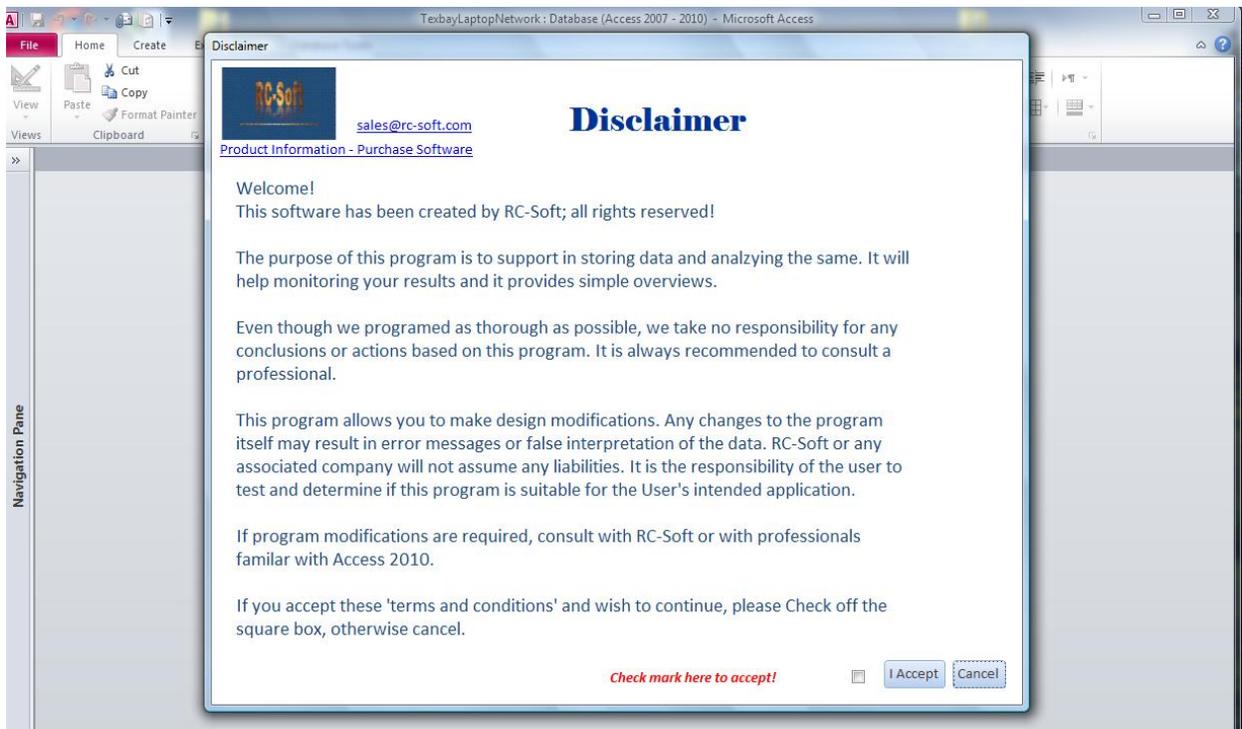
right icon.



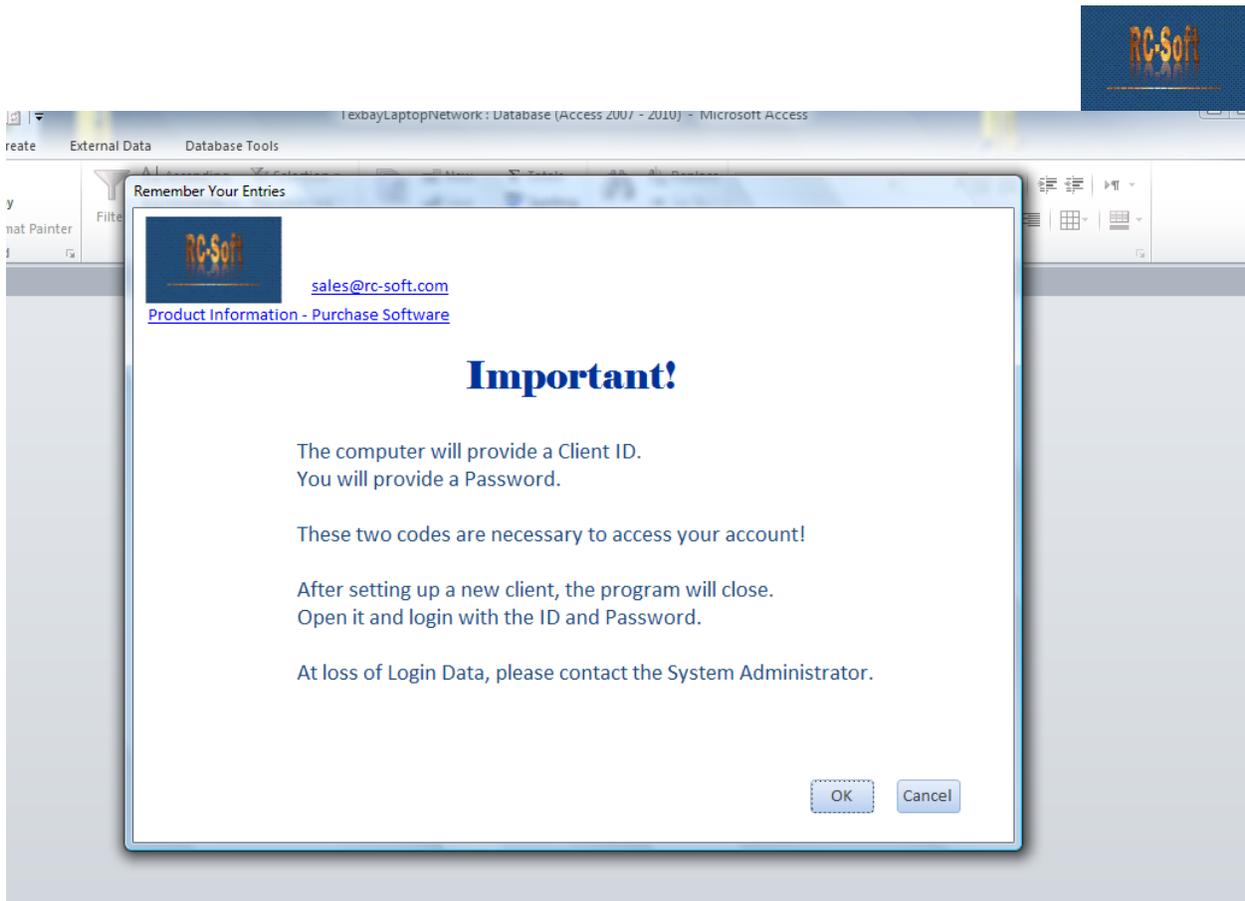
⇒ Click on 'Enable Content'.



⇒ Click on 'New Client'



⇒ Check off the little square.



⇒ Click on 'OK'

Setup New Client

Setup New Client

Your Password is your Minimum requirement!

ID	<input type="text" value="(New)"/>	Notes	<input type="text"/>
password	<input type="text"/>		
First Name	<input type="text"/>		
Middle Name	<input type="text"/>	Street 1	<input type="text"/>
Last Name	<input type="text"/>	Street 2	<input type="text"/>
Phone	<input type="text"/>	City	<input type="text"/>
e-mail	<input type="text"/>	State	<input type="text"/>
Date Of Birth	<input type="text"/>	Zip	<input type="text"/>
Gender	<input type="text"/>	Country	<input type="text"/>

Cancel OK



⇒ Enter your Password as minimum entry requirement.

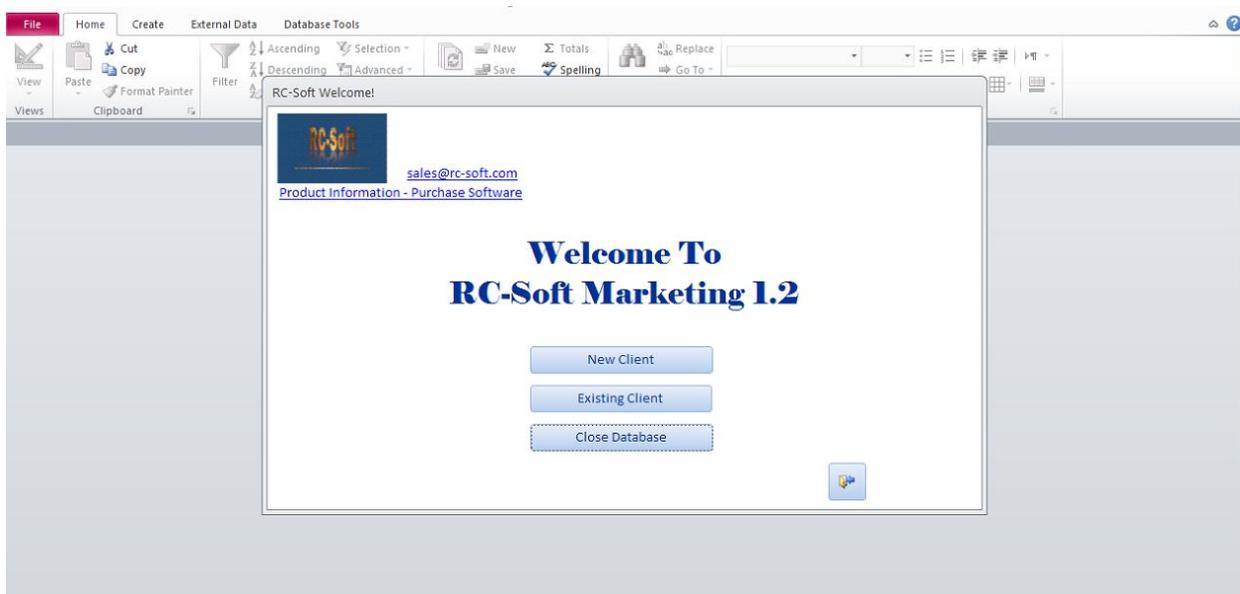
IMPORTANT:

'ID' (provided by the program) and your password are required to enter this program.

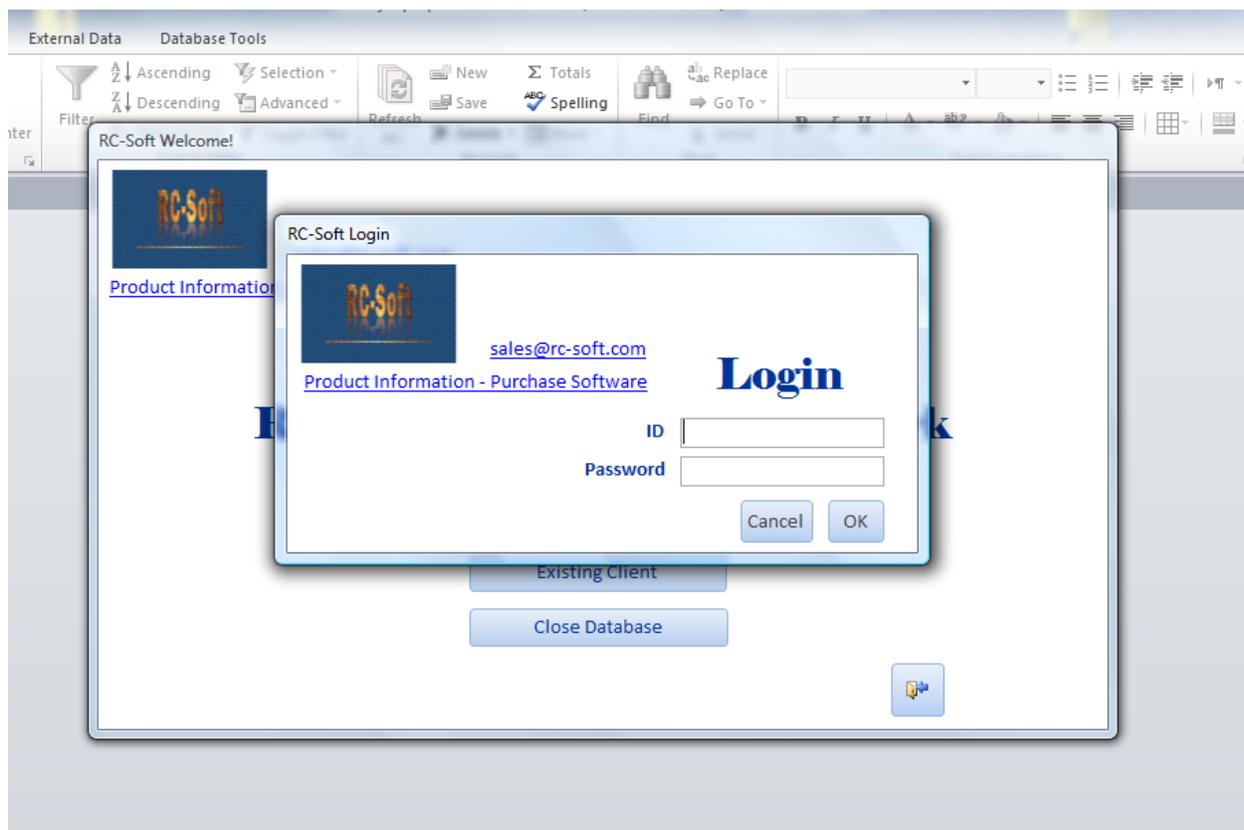
After clicking OK, the program will close down and store the entered information.

⇒ Open the program.

Following screen appears:

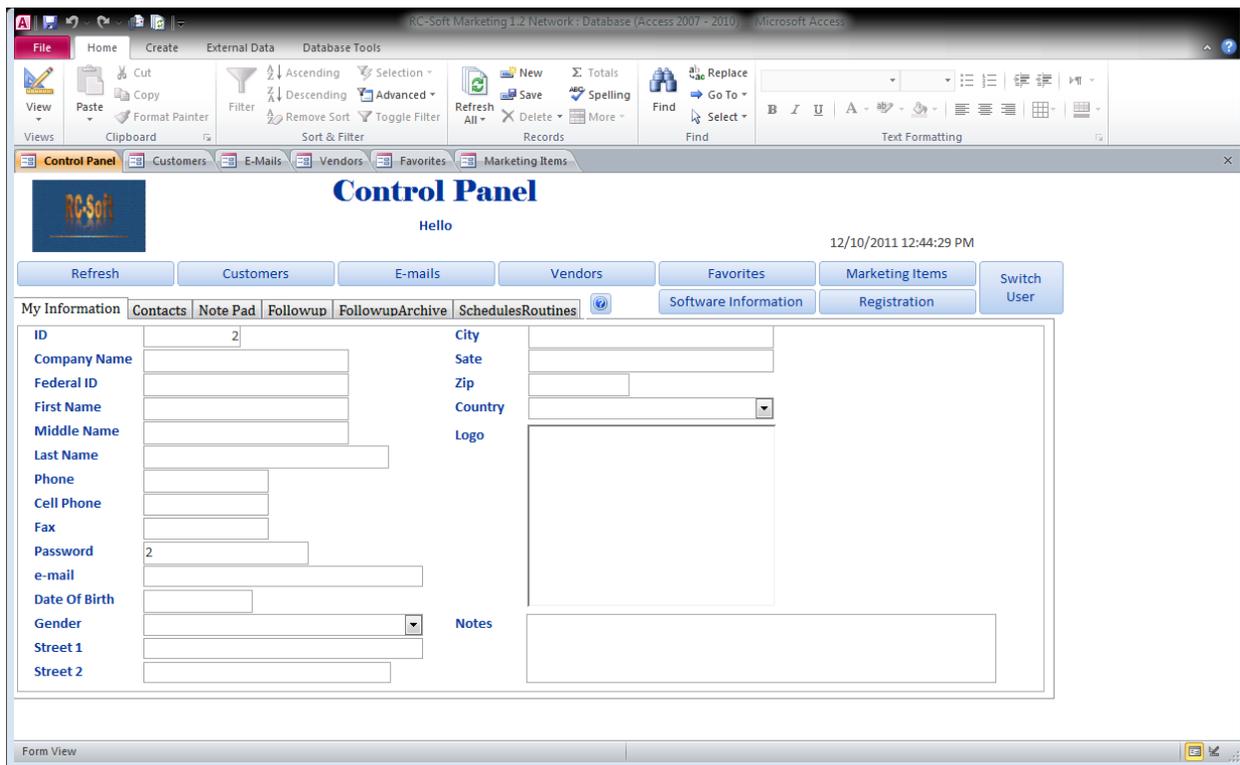


⇒ Click 'Existing Client'



⇒ Enter your ID

⇒ Enter your Password



The setup is concluded.

Following IMPORT and EXPORT Features are optional and not required for working with this Program!



5. Importing & Exporting Existing Data

OPTIONAL

TO IMPORT EXISTING DATA, CONSIDER FOLLOWING STEPS:

Before starting the import process!

Exporting Templates:

⇒ Click tab 'Customers'

Record: 1 of 1

Form View

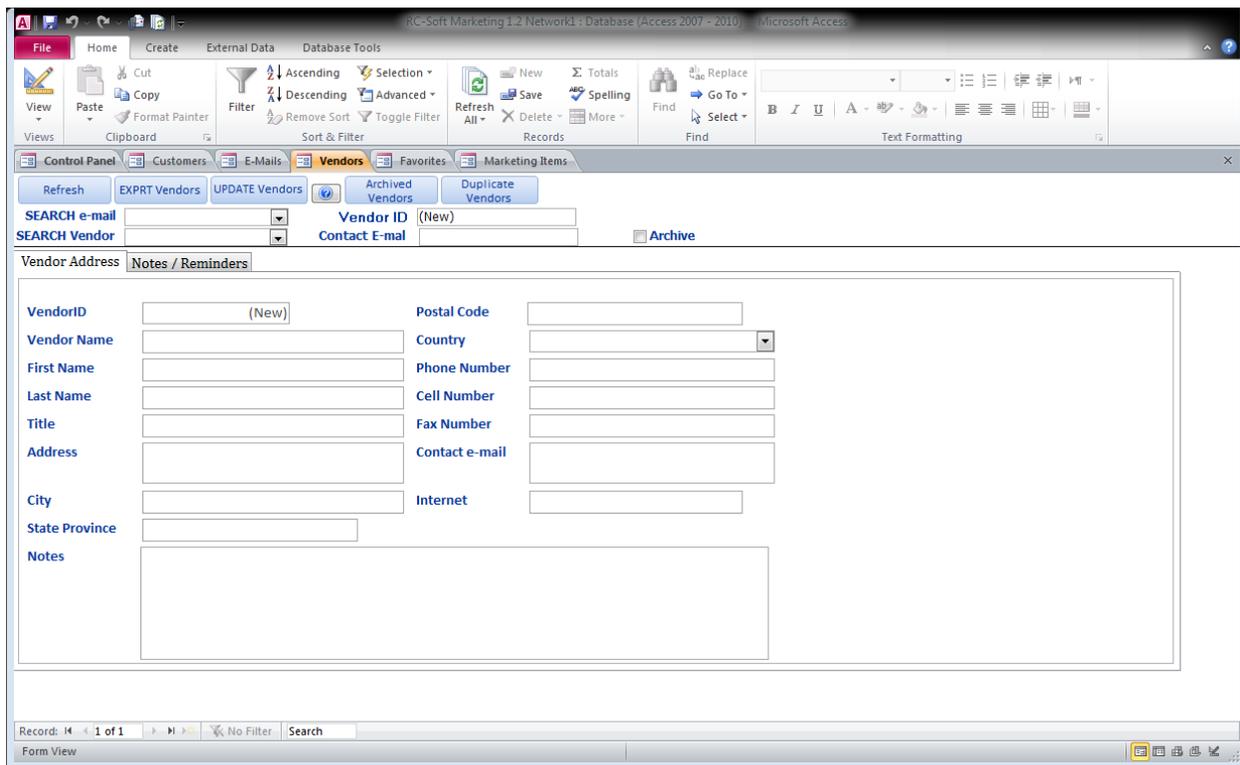
⇒ Click 'Export Customers'

- Save

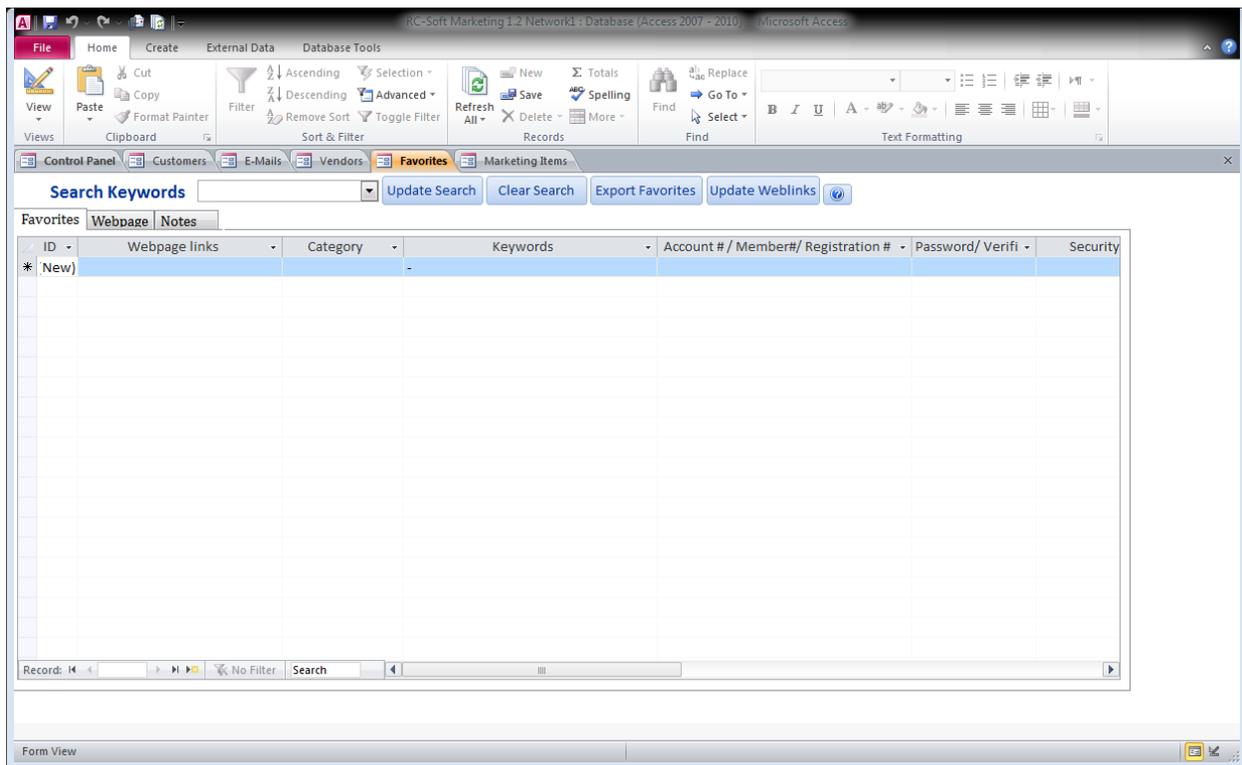
⇒ Click 'Export Items'

- Save

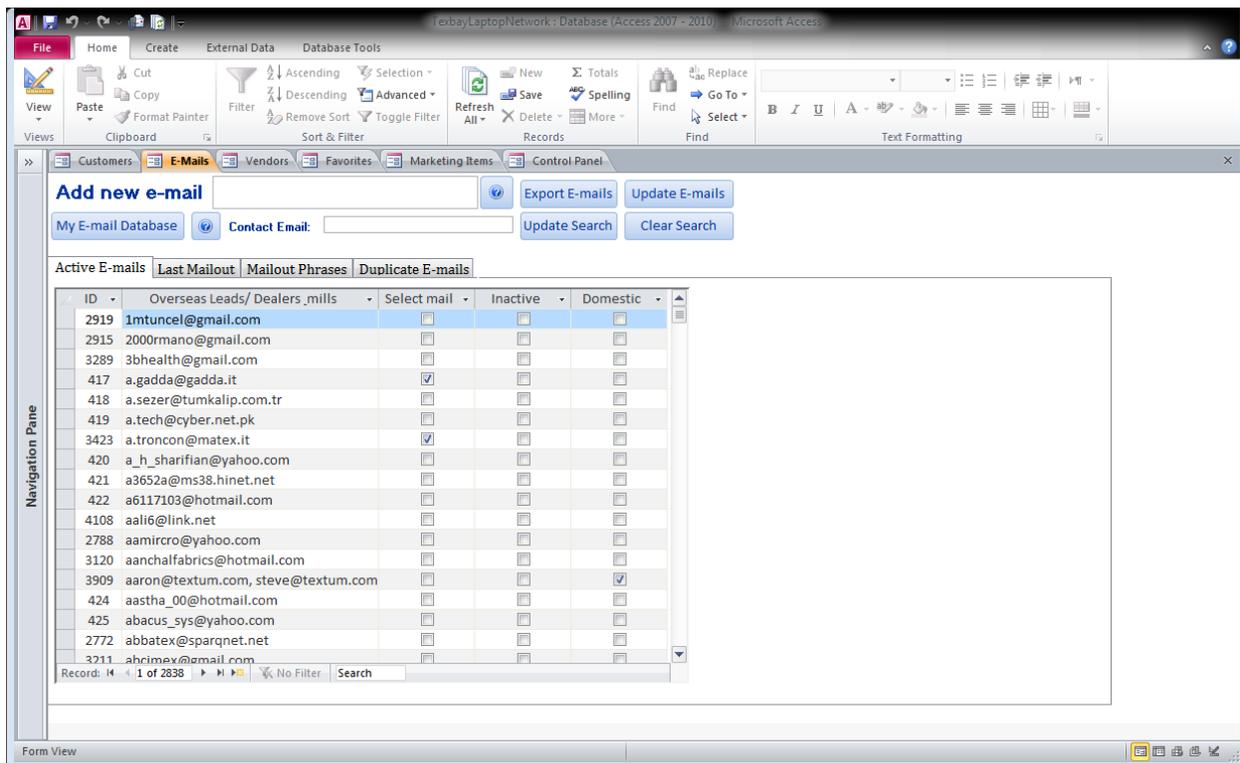
⇒ Click Tab 'Vendors'



- ⇒ Click 'Export Vendors'
 - Save
- ⇒ Click Tab 'Favorites'



- ⇒ Click 'Export Favorites'
 - Save
- ⇒ Click Tab 'E-Mails'



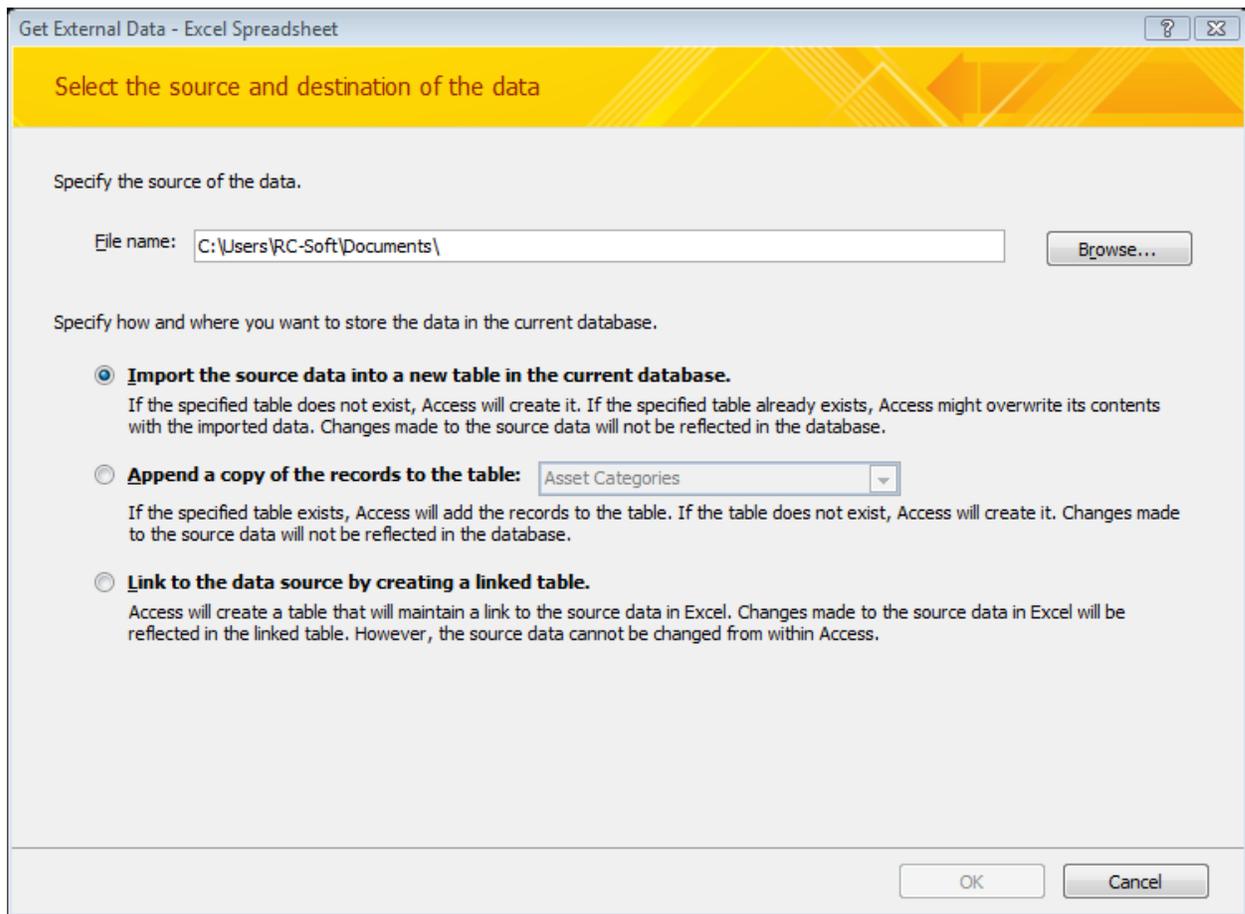
- ⇒ Click 'Export E-mails'
 - Save

Entering Data in Templates:

- ⇒ Open the appropriate Template and enter the data.
 - Error messages may occur if e.g. text is entered instead of numbers.
 - Headers need to be kept identical!

To Import Existing Contacts:

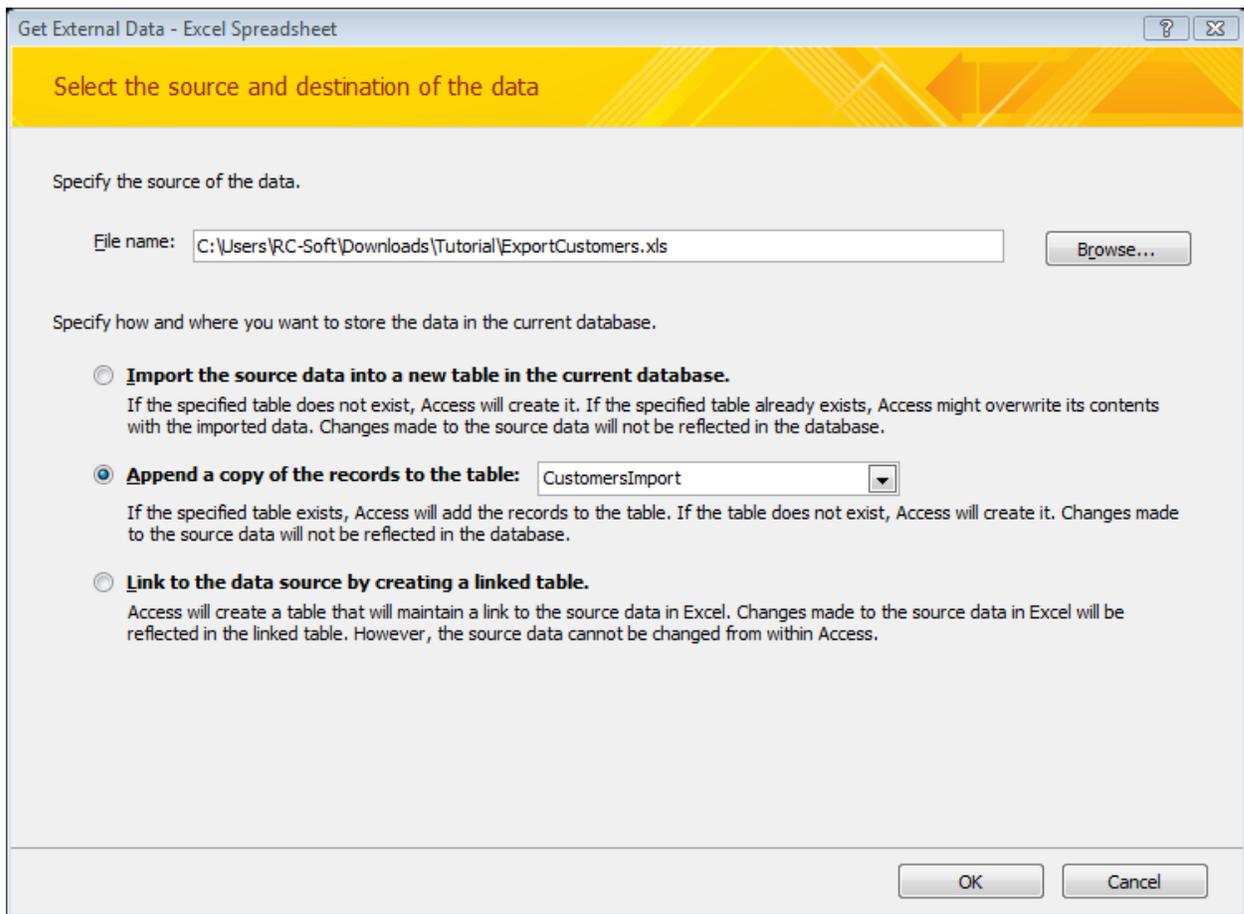
- ⇒ Click on the Access 2010 Menu bar 'External Data'
- ⇒ Click Excel



- ⇒ Click 'Browse'
- ⇒ Open Excel Sheet, if you kept the name it will be 'ExportCustomers'
- ⇒ Click on 'Append a copy of the records....'
- ⇒ Choose 'CustomersImport' from the scroll down button

!!!! It is important to find this exact name!!!!

The screen below may show a different File name and different path, depending on computer settings and file name entered.



⇒ Click 'OK'

Note: The following screen will show empty data for illustration purposes, fill it with own customer information.

Import Spreadsheet Wizard

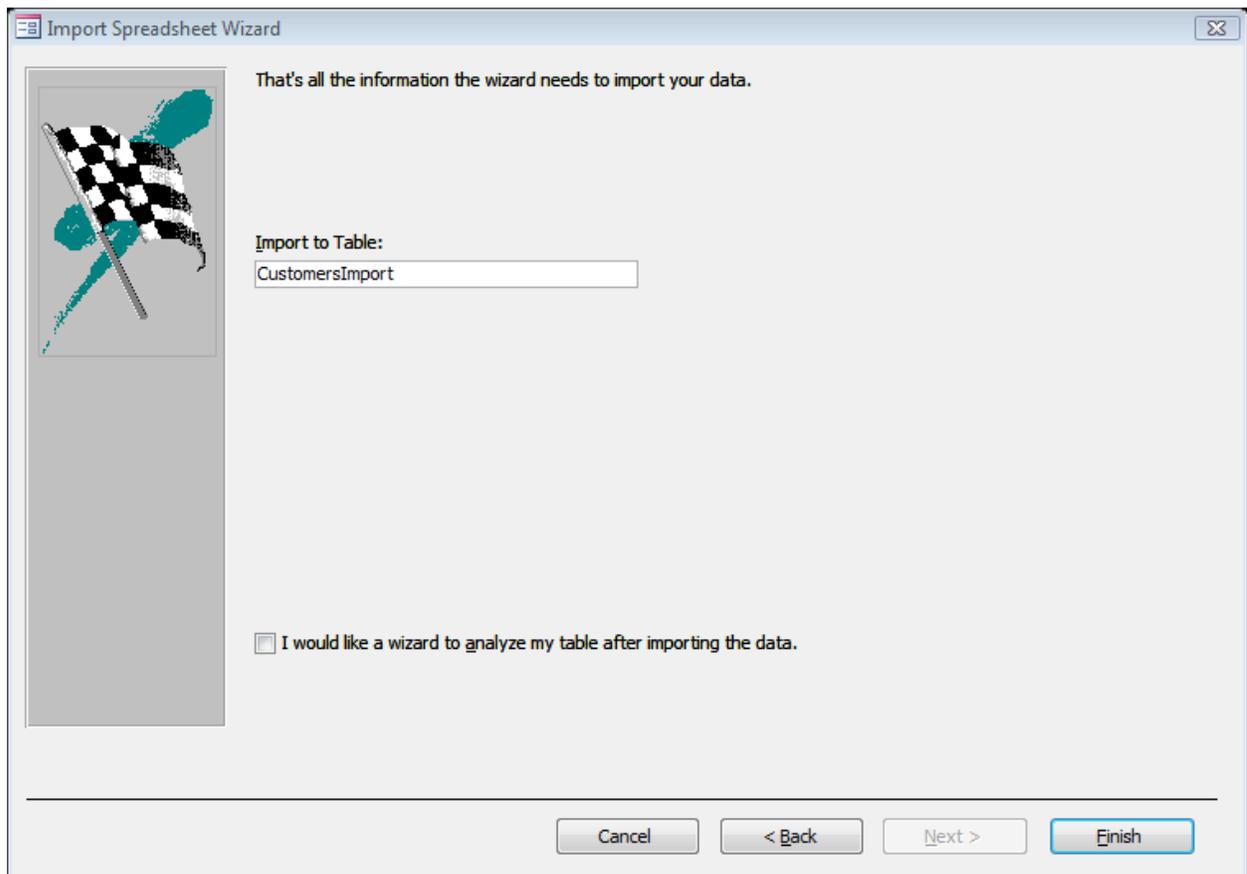
Microsoft Access can use your column headings as field names for your table. Does the first row specified contain column headings?

First Row Contains Column Headings

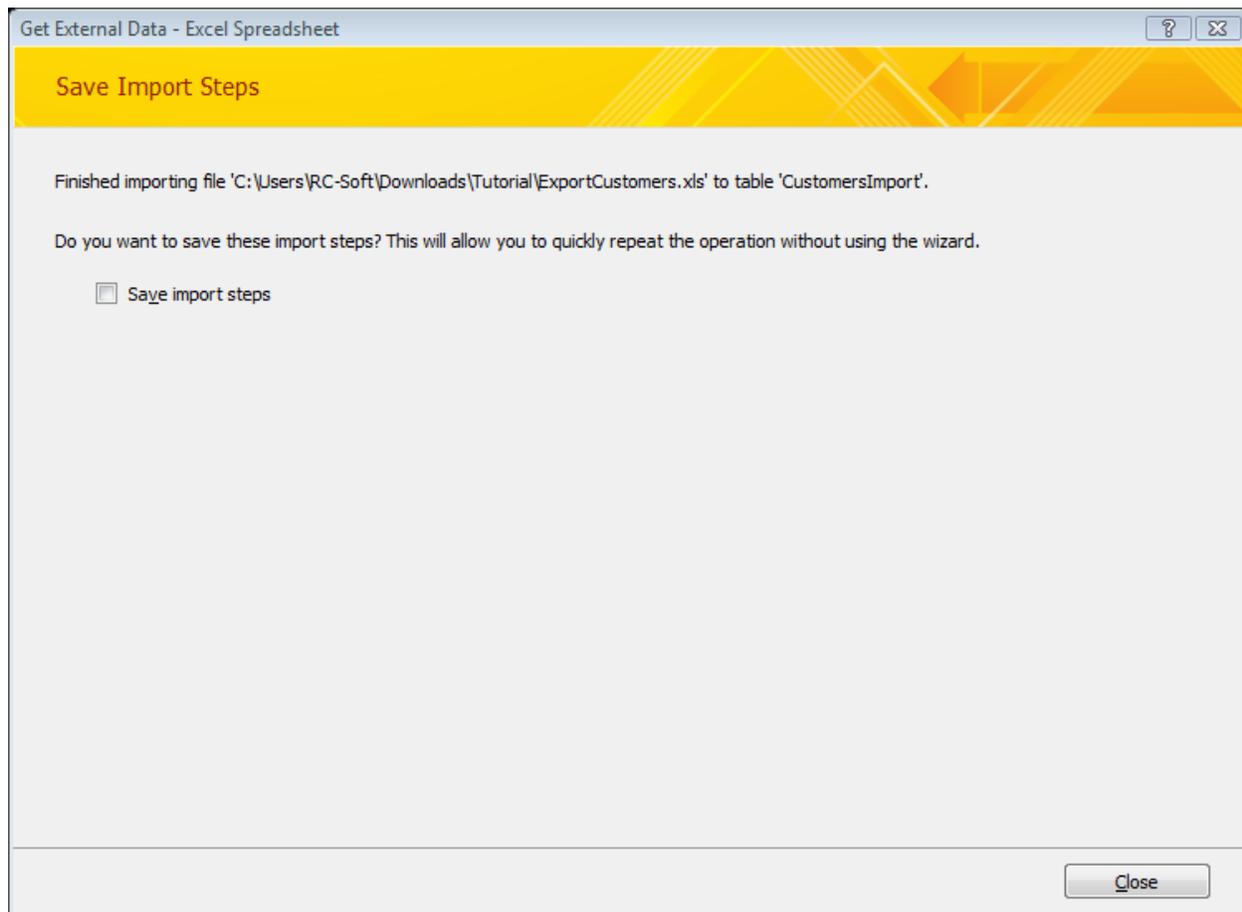
	Customer Name	e-mail	Password	Contact First Name	Contact Last Name	Title	Address	City
1								
2								
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								

Cancel < Back Next > Finish

⇒ Click 'Next'



⇒ Click 'Finish'



- ⇒ Click 'Close'
- ⇒ Click Tab 'Customers'
- ⇒ Click 'Update Customers'

Customers are now imported.

To Import Existing E-mails:

- ⇒ Click on the Access 2010 Menu bar 'External Data'
- ⇒ Click Excel
- ⇒ Find the Excel Sheet, if you kept the name it would be 'Export E-mails'
- ⇒ Click on 'Append a copy of the records....'
- ⇒ Choose 'e-mailsImport' from the scroll down button



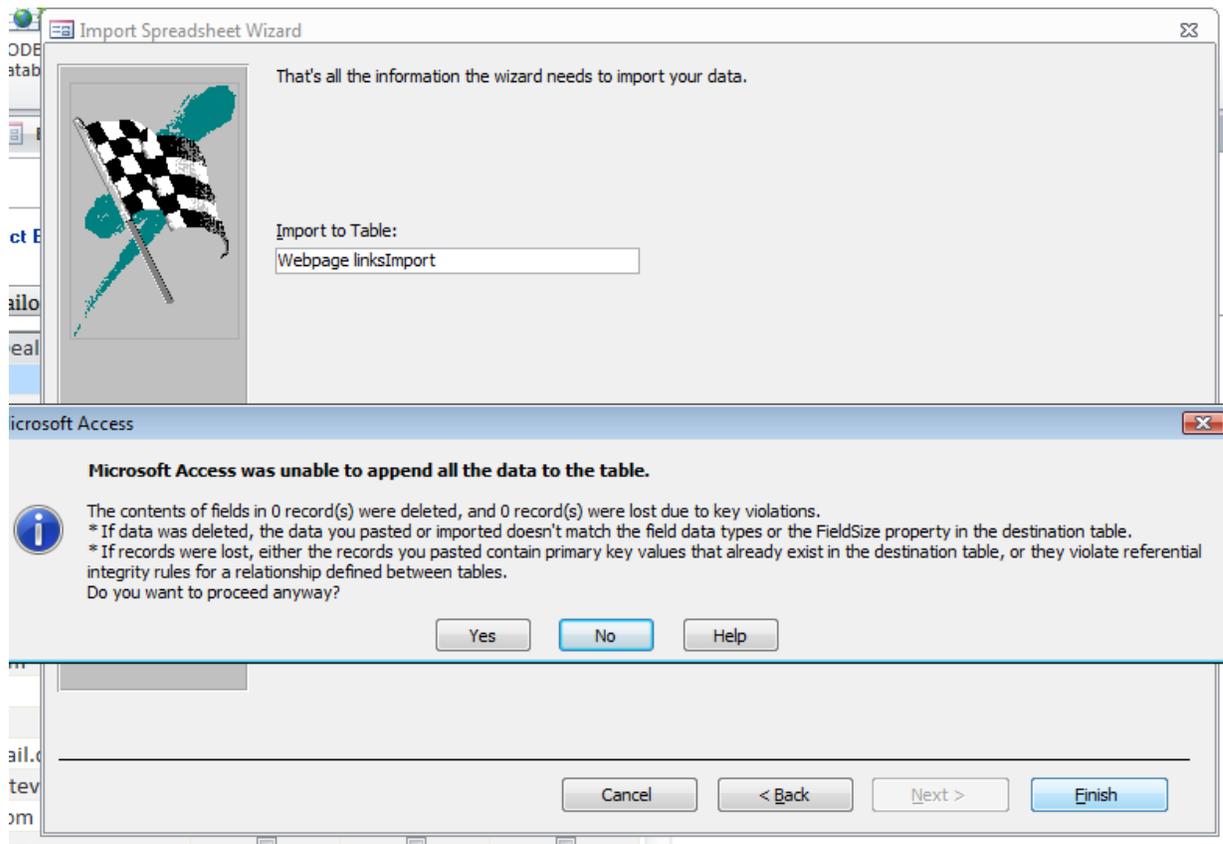
- ⇒ Click 'OK'
- ⇒ Click 'Next'
- ⇒ Click 'Finish'
- ⇒ Click 'Close'
- ⇒ Click Tab 'E-Mails'
- ⇒ Click 'Update E-mails'

e-mails are now imported

To Import Existing Favorites:

- ⇒ Click on the Access 2010 Menu bar 'External Data'
- ⇒ Click Excel
- ⇒ Open the appropriate Excel Sheet, if original name kept the same it will be 'ExportFavorites'
- ⇒ Click on 'Append a copy of the records....'
- ⇒ Choose 'Webpage linksImport' from the scroll down button
- ⇒ Click 'OK'

Note: Sample screen next page!



- ⇒ Click 'Yes'
- ⇒ Click 'Close'
- ⇒ Click Tab 'Favorites'
- ⇒ Click 'Update Weblinks'

Favorites or Weblinks are now imported.

To Import Existing Vendors:

- ⇒ Click on the Access 2010 Menu bar 'External Data'
- ⇒ Click Excel
- ⇒ Open the appropriate Excel Sheet, if the name is kept the same it will be 'ExportVendor'
- ⇒ Click on 'Append a copy of the records....'
- ⇒ Choose 'VendorImport' from the scroll down button



- ⇒ Click 'OK'
- ⇒ Click 'Next'
- ⇒ Click 'Finish'
- ⇒ Click 'Close'
- ⇒ Click Tab 'Vendors'
- ⇒ Click 'Update Vendors'

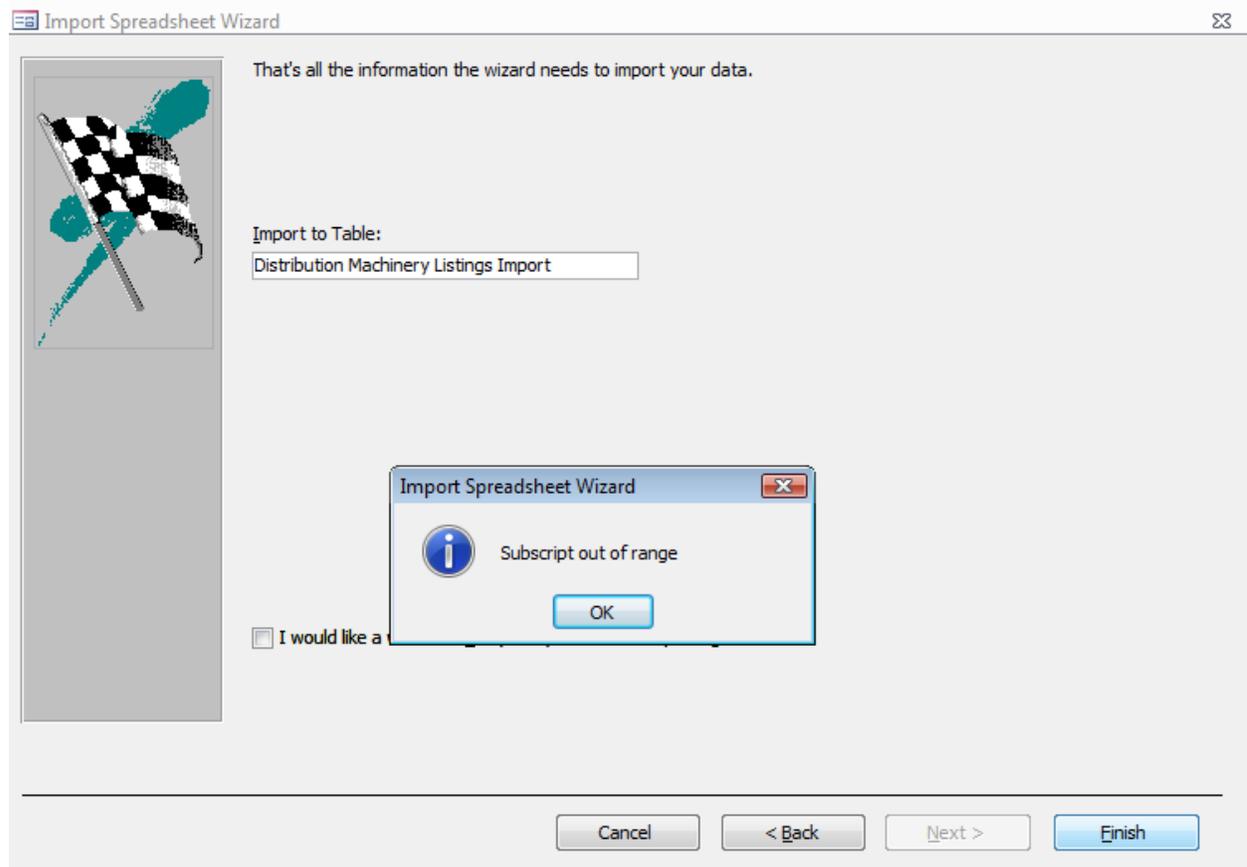
Vendors are now updated.

To Import Existing Items:

Before start, we suggest to close the program first and then login again.

- ⇒ Click on the Access 2010 Menu bar 'External Data'
- ⇒ Click Excel
- ⇒ Open the appropriate Excel Sheet, if the name is kept the same it will be 'Distribution Machinery Listings' (*For Your Information: This program was originally created for tracking machinery and certain names were inherited. It will have no bearing on the items you may choose to enter*).
- ⇒ Click on 'Append a copy of the records....'
- ⇒ Choose 'Distribution Machinery Listings Import' from the scroll down button
- ⇒ Click 'OK'
- ⇒ Click 'Next'
- ⇒ Click 'Finish'

Depending on your computer settings following screen may appear:



- ⇒ Click 'OK'
- ⇒ Click 'Cancel'
- ⇒ Close your entire Program
- ⇒ Open the Program again
- ⇒ Click 'Existing Client'
- ⇒ Login with your ID and Password
- ⇒ Click on the Access 2010 Menu bar 'External Data'
- ⇒ Click Excel
- ⇒ Find the Excel Sheet, if you kept the name it would be 'Distribution Machinery Listings'
- ⇒ Click on 'Append a copy of the records....'
- ⇒ Choose 'Distribution Machinery Listings Import' from the scroll down button
- ⇒ Click 'OK'
- ⇒ Click 'Next'



⇒ Click 'Finish'

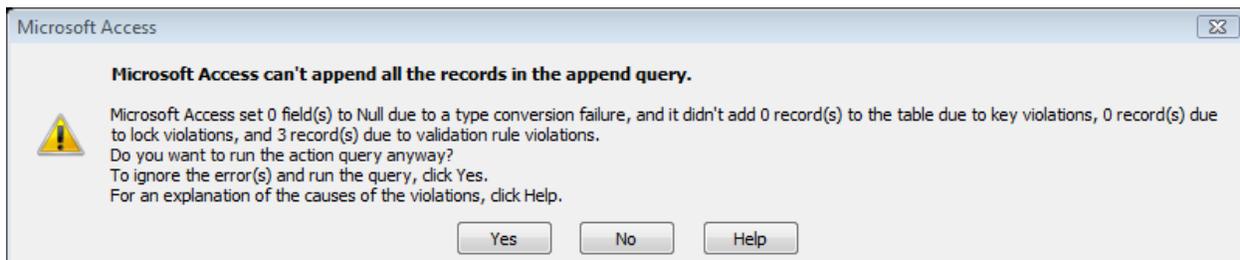
If the above screen didn't appear, continue here!

⇒ Click 'Close'

⇒ Click Tab 'Customers'

⇒ Click 'Update Imo'Items'

You may see following screen:



⇒ Click 'Yes'

⇒ Click Tab 'Marketing Items'

⇒ Click 'Clear Search'

Items are now imported.



6. Setting up multiple Users

General Note for Multiple Users:

This Feature is for RC-Soft Marketing 1.2 Network'



7. Encrypting your Database (optional)

Encryption is an option to secure the database from unwanted access.

Only personnel knowing the password for the encrypted database will be able to access it, and only from the actual encrypted Program itself.

Once 'Encrypted', this Program does not allow any network user to access it.

Once the Program is 'Decrypted', all users will be able to use the Program again.

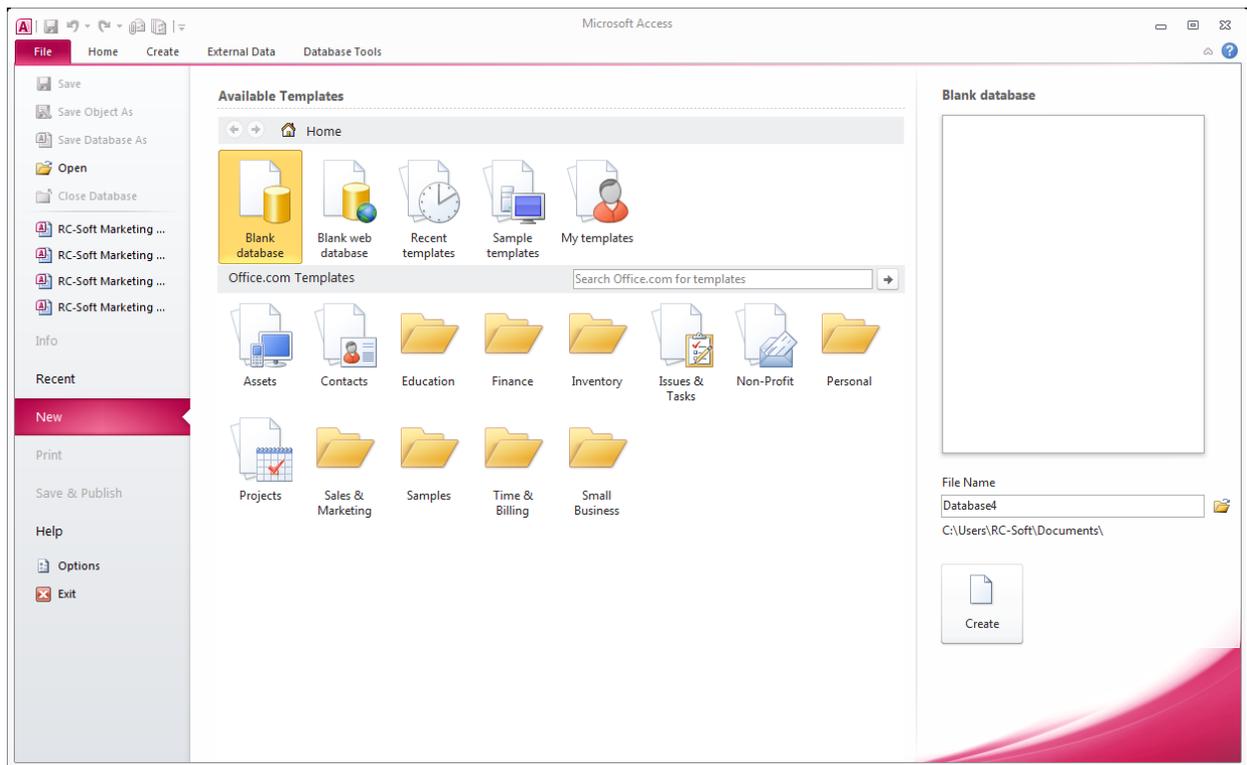
IMPORTANT WARNING:

Once your Program is encrypted, Nobody will be able to recover the password!!!

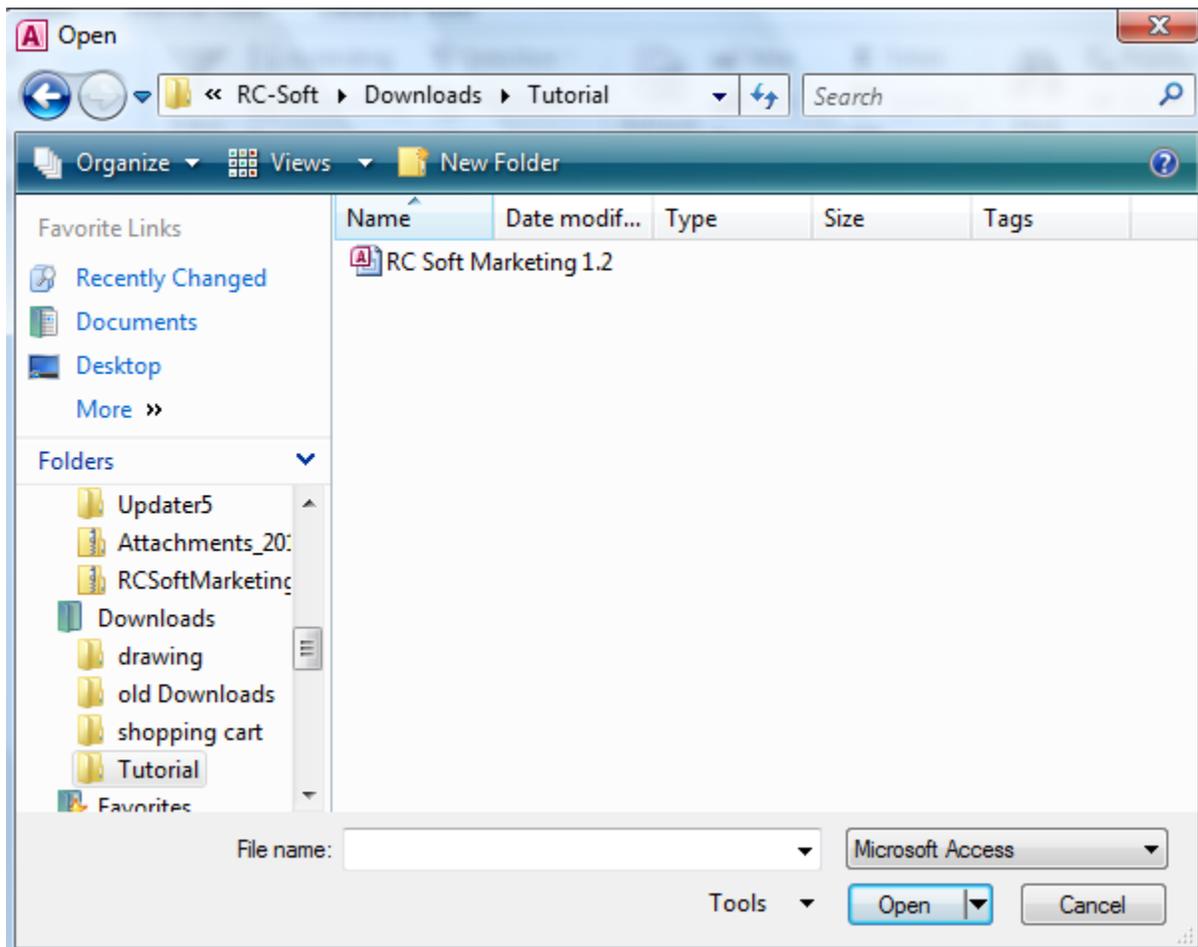
All data will not be accessible without the password!

In order to encrypt the Program, open it in the 'Exclusive' mode.

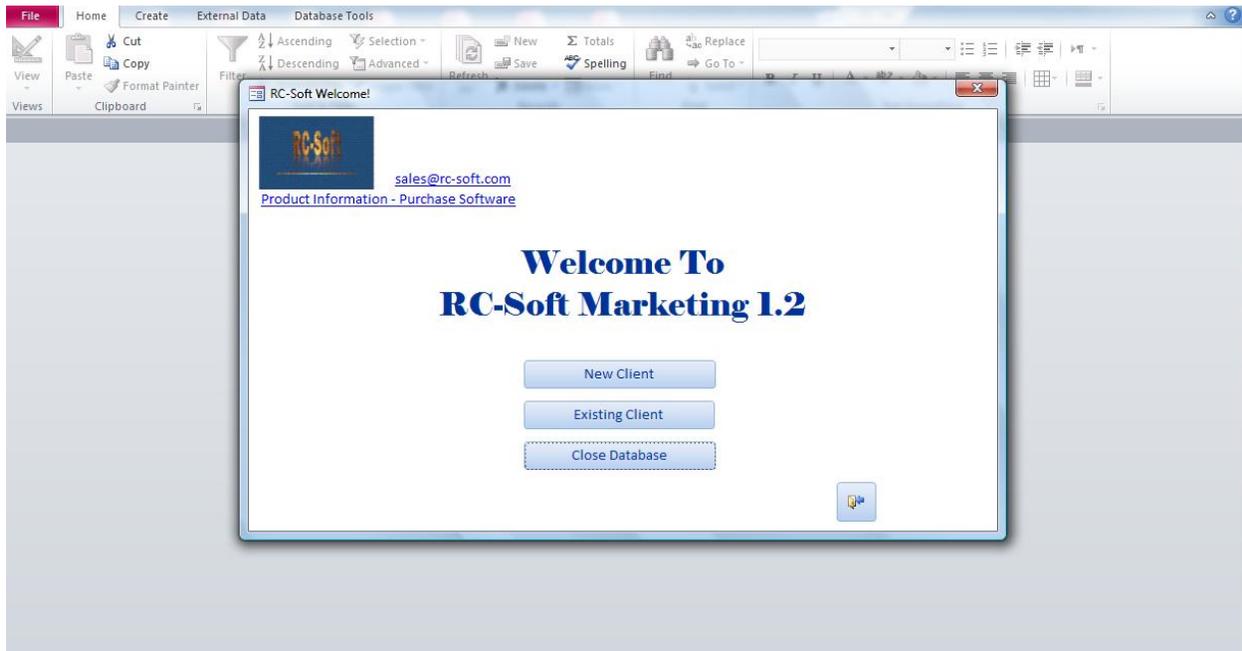
- ⇒ Open Access 2010 or later
- ⇒ Click 'File'



⇒ Click 'Open'

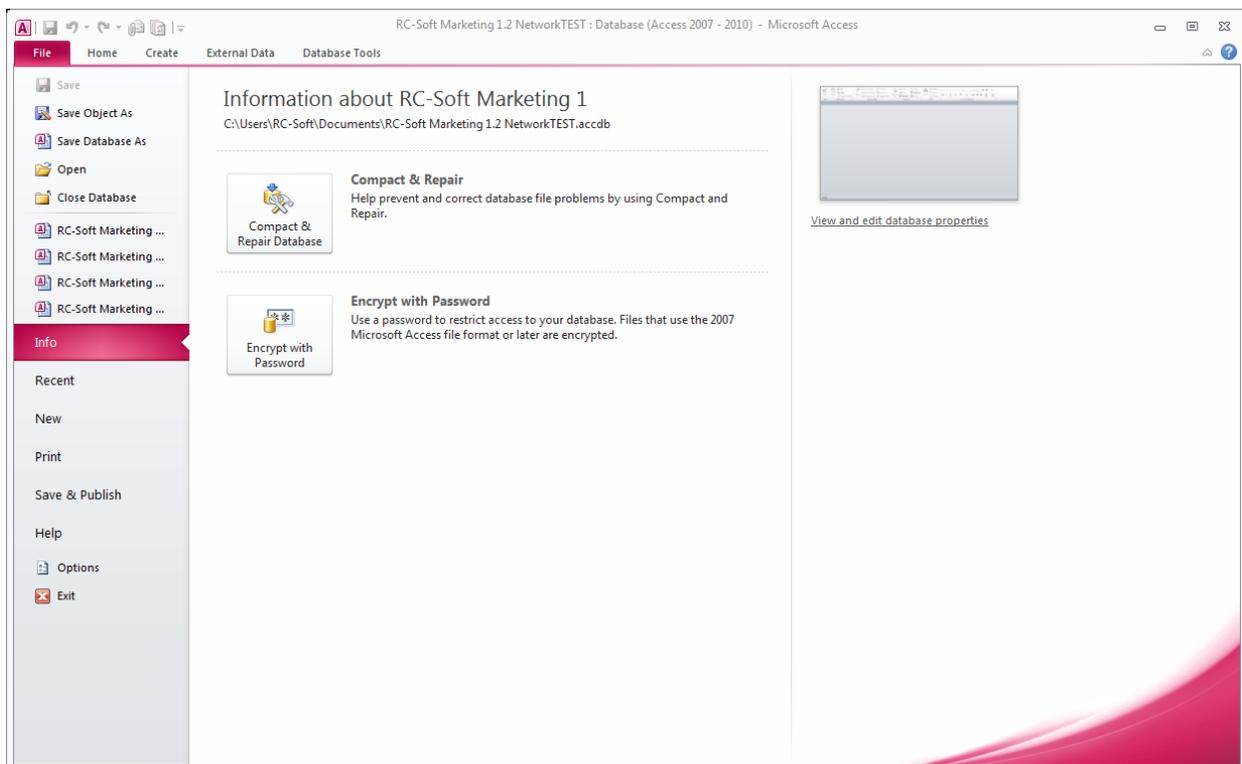


- ⇒ Click on the 'down arrow' of the icon 'Open' to see more options
- ⇒ Click 'Open Exclusive'

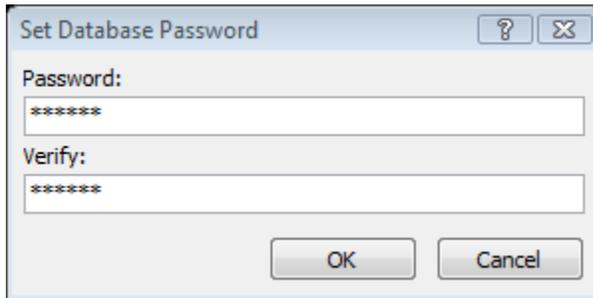


⇒ Click 'bottom right icon'  to close the form

⇒ Click 'File'



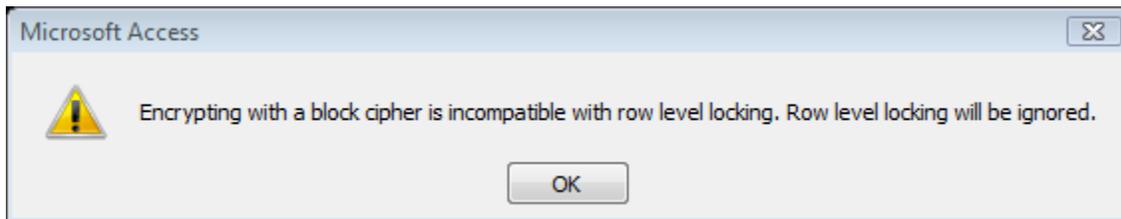
⇒ Click 'Encrypt with Password'



⇒ Enter password and verify

⇒ Click 'OK'

This message may appear:



⇒ Click 'OK'

Database is now encrypted.



Contact us:

Internet: <http://rc-soft.com>

e-mail: sales@rc-soft.com