



Modulus Technical Note #35 - Sequences (Amended 17/2/99)

The Sequences companion to the Diary permits the automatic creation of new Diary Items based on previous Diary Items (ie on the contact history with a particular prospect or customer). The new Diary Item has an Action Code based on the previous Action and Result: these combinations are fully user-definable. Once Sequences have been set up, the operation of the companion module is automatic. Sequences are set up using the function on the Others menu in the Data Manager.

The screenshot shows a window titled "SEQUENCE" with the following fields and options:

- Sequence Code:** 1/2
- WHEN**
 - Action:** CS Sales Call
 - AND**
 - Result:** NI Not In
- ARE COMPLETED IN THE DIARY, CREATE A NEXT ACTION:**
 - Action:** CS Sales Call
 - Desc:** Follow up that call
 - Document:** [Empty field]
 - Macro:** [Empty field]
 - After:** 1 Days
 - Person:** [Empty field] (leave blank for the same Person)
- Radio buttons:**
 - Check first & display on screen
 - Check then create without displaying
 - Do it without checking
 - Don't do it - inactive
- Buttons:** [Y/N]

In the simple example illustrated above, a Sequence item has been set up where, if a phone call has been made to someone who is not in, a Diary Item will be created as a reminder to repeat the call tomorrow. The radio buttons towards the bottom of the screen govern how invisible to the user the creation of the new Diary Item is to be. If Modulus is to ask for confirmation before creating the new Diary Item (as in the illustration), this will occur when the Diary Item is accepted (ie when the [] button or the <Enter> key is pressed), not when the Result Code is entered.

It may be that a preferable course of action would be to write a letter including the text "I called you today, but you were not in", in which case the Document field should be filled in with the appropriate document code. The letter would then be printed automatically next time the 'Mail Diary' function is run.

It is possible to enter Sequence items that contain no Action Code. This would be the case if you need a new Diary Item to be created after a certain Result, irrespective of the Action. For example, a Result of 'MBRO1 - Mail Brochure 1' could



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follow many different Actions (such as Calls, Mail In, Appointments). When the brochure is mailed, you may need to schedule a follow-up call for a week later, irrespective of the original Action causing the brochure to be sent. The Sequence item, therefore, would have a blank Action, MBRO1 as its Result and CS (or equivalent for sales call) as its Next Action. Thus there would be no need to create several Sequence records to cater for every Action-Result combination.

The Sequences entry screen features a Macro field. If you specify a Macro Code here (with the usual @ look-up list), then this Macro will be played on accepting a Diary record that initiates the Sequence. If the Macro is a Same Process one it can evaluate the fields of the Diary record to decide how to proceed. The Macro is played before the Sequence creates a new Diary Item. Diary Sequences can be initiated by the 'Enter Letters' and 'Enter Quotations' word processing functions as well as the 'Enter to Diary' function.