Product Training
Customer Relationship Management (CRM)

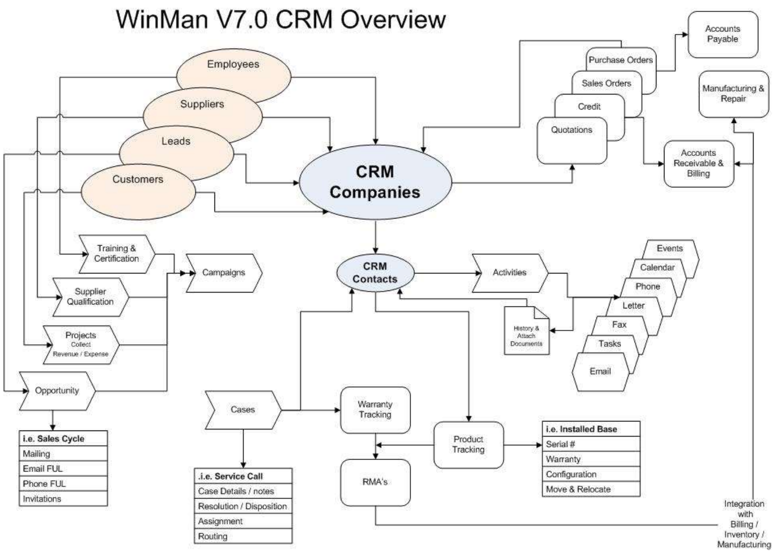
Where "Lean" principles are considered common sense and are implemented with a passion!

winman
ADVANCED ERP SYSTEMS

CRM

CRM is an advanced module in WinMan that can be used in many ways. At the very basic level CRM tracks Potential customers and contacts which can later be converted to Customers. Layers such as sources, projects, campaigns and events can be added as required.

The CRM module is designed to be flexible and allow the multiple tool sets to be configured for a site. Modules can be used in multiple ways depending on the requirements of the site.

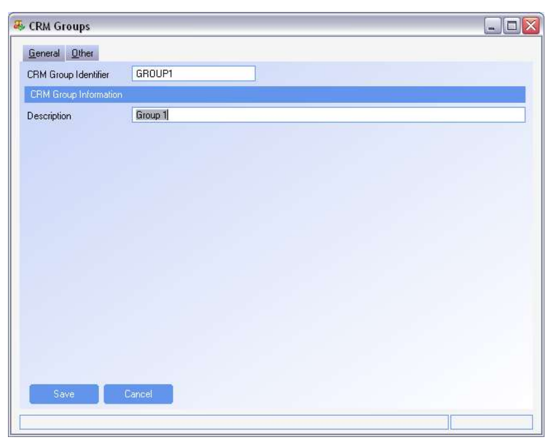


CRM Flowchart

CRM Standing Data

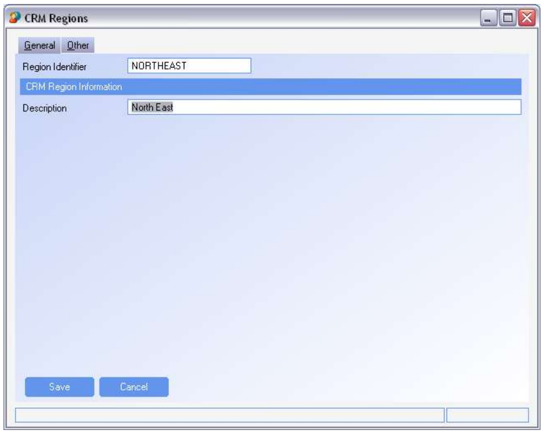
CRM Groups

- ❑ **CRM Groups** are used to group CRM contacts.
- ❑ CRM Groups are used for reporting.



CRM Standing Data

CRM Regions

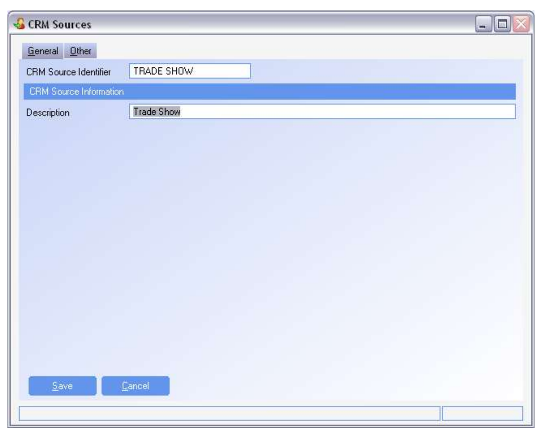


- CRM Regions are used to group CRM contacts.
- CRM Regions are used for reporting.
- CRM Regions can represent geographical areas where contacts can be found.

CRM Standing Data

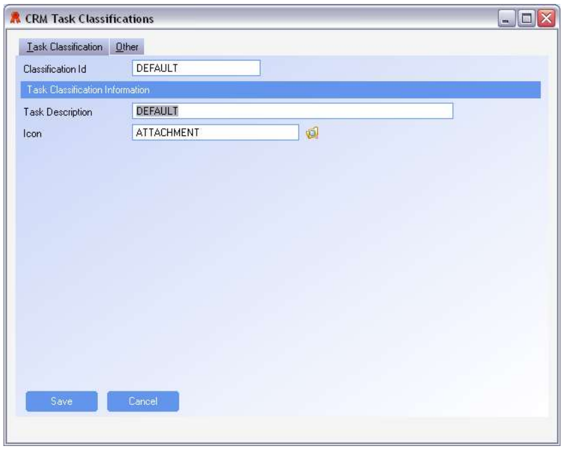
CRM Sources

- CRM Sources are used to identify where a project or a contact come from.
- CRM Sources are typically things like Web Site, fax, or Referral. They can also be more detailed such as Mailing 07, or NY Trade show 06.
- CRM Sources are similar to CRM campaign but lack functionality such as entering a budget, assigning an owner or viewing all projects related to the CRM Source (which CRM Campaigns have).
- Sources are simple and have no task, calendar or note capability.



CRM Standing Data

CRM Task Classifications

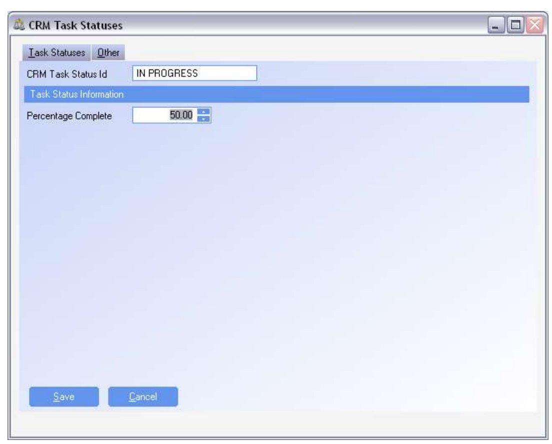


- ❑ CRM Task Classifications are used to identify the type of task.
- ❑ CRM Tasks Classifications are related to CRM Tasks as well as CRM notes.
- ❑ CRM classifications could be;
  - Phone call
  - Email
  - Fax
  - Note
  - Send Document
- ❑ The Icon feature will allow you to select an icon that relates to the task. This will display on the Today tab in CRM Summary.

CRM Standing Data

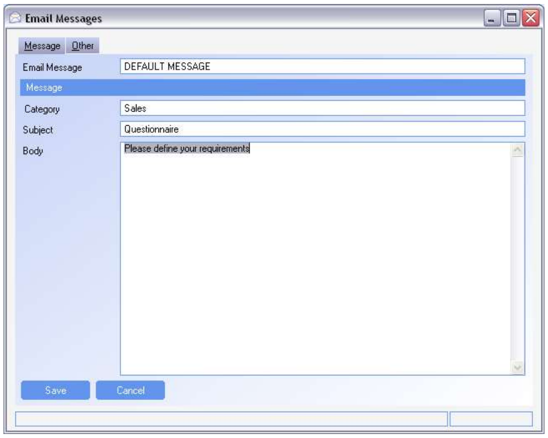
CRM Task Statuses

- ❑ CRM Task Statuses are milestones for a task.
- ❑ A percentage complete is used to designate the completion percentage once a status has been completed.
- ❑ CRM Task Statuses are used for CRM Tasks, as well as CRM calendar events.



CRM Standing Data

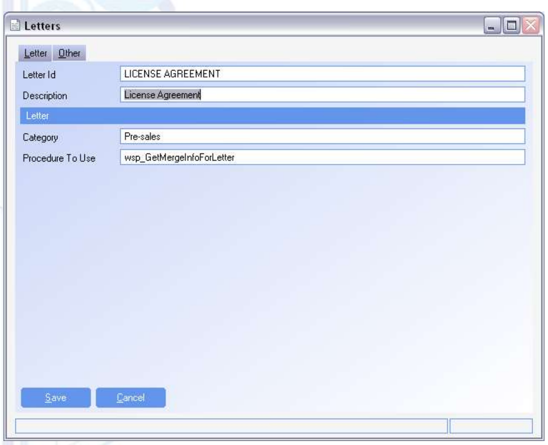
Email Messages



- Email messages are standard emails that are sent out multiple times.
- When sending an Email, an Email message can be selected which will populate the subject and body of the email. Changes can be made to the email before it is sent to customise for the instance.
- Attachments can be added to the standard message using the Add Attachment action.

CRM Standing Data

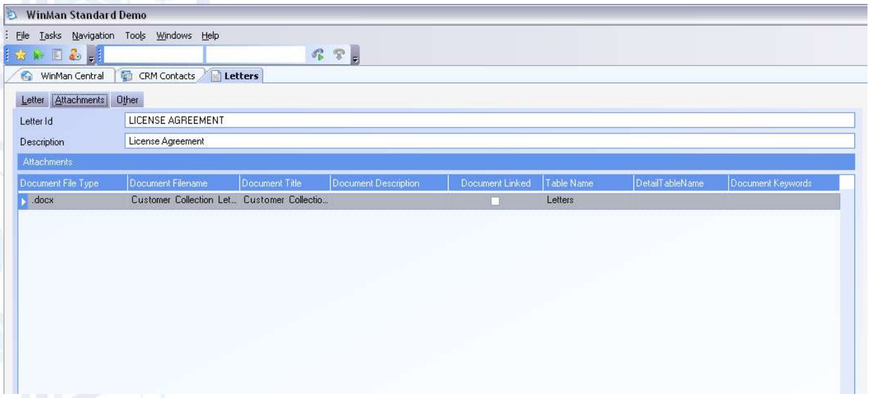
Letters



- Letters are used to store mail merge letters that can be sent to a contact.
- The letter ID, description and Category are used to classify the different types of letters.
- The Procedure to Use is a WinMan stored procedure that is used to pull data from the contact and company records for the purpose of automatically inserting data into the mail merge letter.
- An Alternate procedure can be written if different fields are required for mail merge letters.

CRM Standing Data

Letters



To add a form letter, select the action Add Attachment.

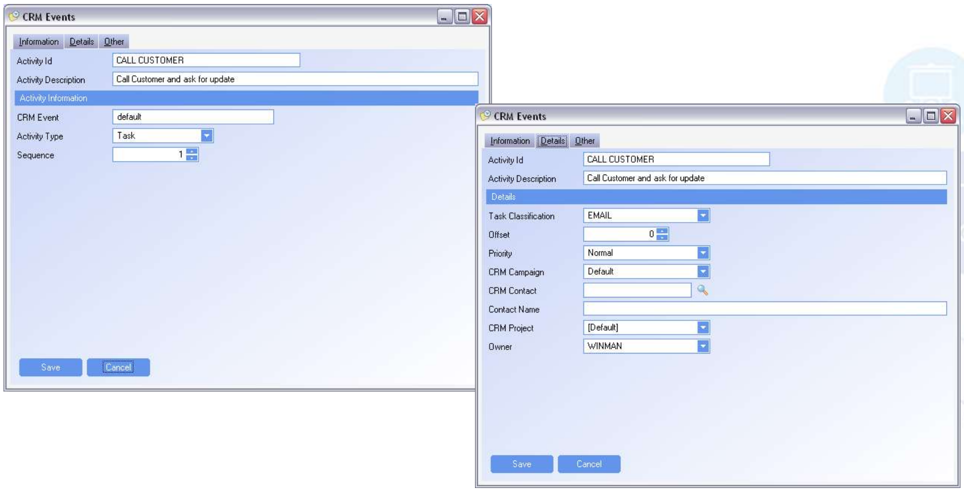
CRM Standing Data

Letters

Fields that can be automatically used with the default stored procedure include;

❑ CompanyName	Your company name (from Sites)
❑ CompanyAddress	Your company address (from Sites)
❑ CompanyPhoneNumber	Your company phone number (from Sites)
❑ CompanyFaxNumber	Your company fax number (from Sites)
❑ CompanyEmailAddress	Your company email address (from Sites)
❑ CompanyWebsite	Your company web-site (from Sites)
❑ UserName	Your user name (from Users)
❑ Emailaddress	Your email address (from Users)
❑ RecipientName	The company or contact's name the letter is being sent to
❑ Address	The company or contact's address the letter is being sent to
❑ City	The company or contact's city the letter is being sent to
❑ Region	The company or contact's state the letter is being sent to
❑ PostalCode	The company or contact's zip code the letter is being sent to
❑ CountryID	The company or contact's country the letter is being sent to
❑ Balance	The value of outstanding sales invoices. Used when sending a letter to a CRMCompany or Customer

CRM Events



CRM Events

- ❑ CRM Events can be used for processes that will occur multiple times. A CRM event can be added to a Contact or all contacts for a company.
- ❑ CRM Events are like a work flow where multiple defined events are established. When defining an event, the event should be given an ID that represents the work flow i.e. New System Sale.

Informations Tab

- ❑ Activities can be added to the Event and can be 1 of the following;
  - ❑ Task
  - ❑ Appointment (Calendar item)
  - ❑ Note
  - ❑ Email
  - ❑ Fax
  - ❑ Letter
- ❑ Sequence the activity in order that they should be completed. Generally, increase your sequence by 10 so that future items can be inserted without having to re-sequence all activities.

CRM Events

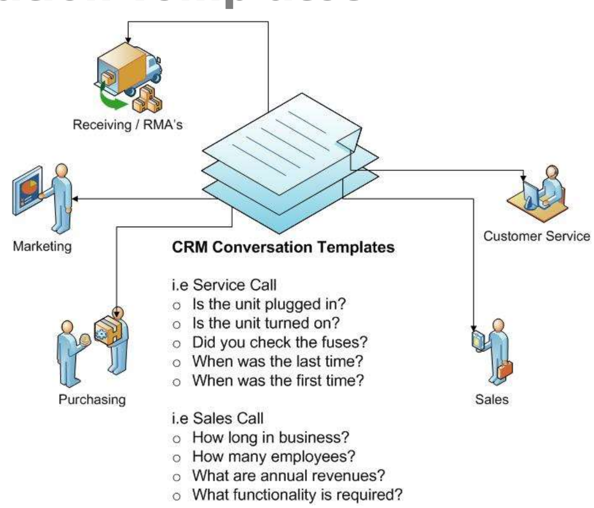
Details Tab

- Task Classification is what type of activity is this.
- **Offset** – The number of days that the task will take. The next sequenced activity will start on the end date of the previous activity.
- **Priority** – The priority of the item which can be Low, Normal, or High.
- **CRM Campaign** – Attached to generated Notes and Tasks when the event is added. Can be used for reporting.
- **CRM Contact** – The contact that the activity is related to. If an activity has a contact selected, all other activities should also have a contact. If the activity is an email fax or letter the activity must have a contact. If a contact is used, the event can not be applied against other contacts.
- **CRM Project** – Attached to generated Notes and Tasks when the event is added. These are visible in CRM Projects when reviewing a project.

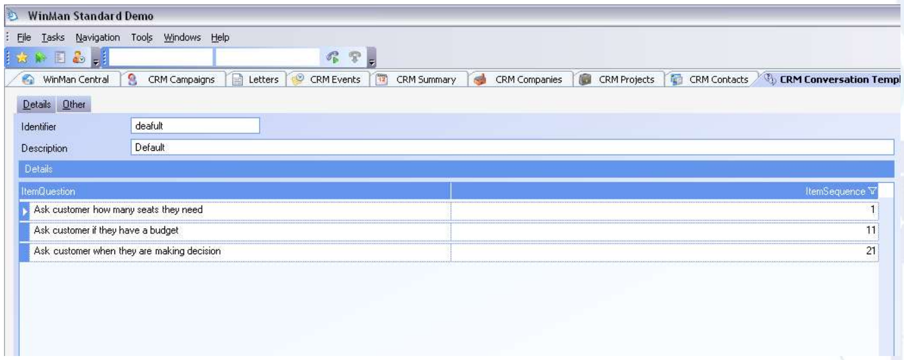
NOTE: When adding a CRM Event a project can be linked to the entire Event when it is added.

- **Owner** – The owner of the activity.

CRM Conversation Templates



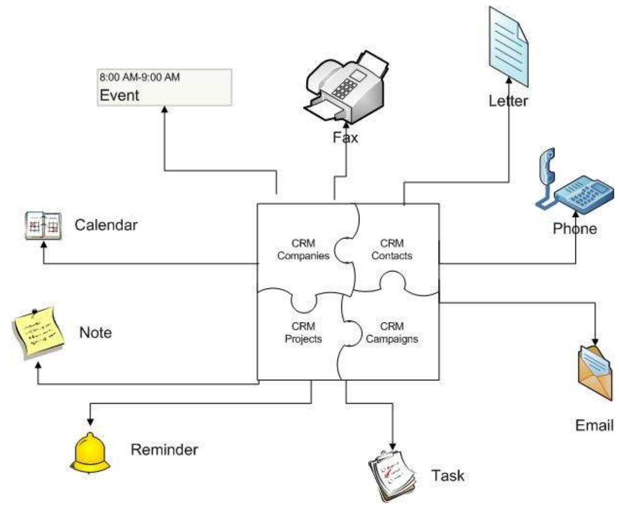
CRM Conversation Templates



CRM Conversation Templates

- ❑ CRM Conversation templates are used to create a script when logging phone calls.
- ❑ Conversation templates are used when a defined set of questions or points are required during a conversation.
- ❑ Templates can be used for a variety of situations including(but not limited to);
  - Initial sales Call.
  - Follow up after quote is sent.
  - Pre-defined questions for an item being returned.
- ❑ A conversation Template consists of a header, what the template is used for, and line items, the items to review during the call.
- ❑ Items can be sequenced in any order and automatically increment by 10 so that any steps in between can be added at a later date.

CRM Actions

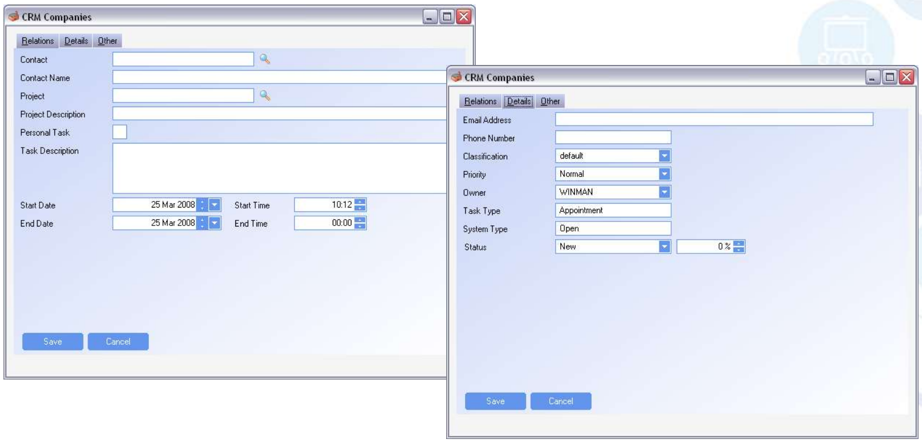


CRM Actions

- There are a number of common CRM Actions that can be found in multiple CRM modules.
- The common CRM actions will be examined in this section and noted in which CRM modules they can be found.
- Actions that are unique to an individual CRM module will be examined with the module.
- CRM Actions can be found in CRM Companies, CRM Contacts, CRM Projects, CRM Campaigns and CRM Summary.

CRM Actions

Add Calendar



CRM Actions

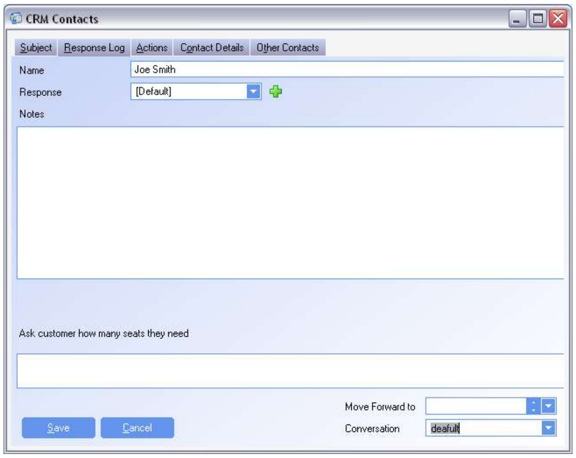
- ❑A Calendar item can be added and related to a project, contact, both or neither
- ❑ If the Calendar relates to a contact, enter the contact name. Only projects that relate to the contact may be selected.
- ❑ If the Calendar relates to a project, enter the project. Only contacts that relate to the project can be selected
- ❑ If the Calendar does not relate to a project or a contact, select the check box for Personal task and no contact or project is required to be selected.

Details Tab

- ❑ Select the classification. This is from CRM Task Classifications and will indicate what is to be done for the Calendar item
- ❑ Select the priority. Available options include High, Normal and Low.
- ❑ Select the owner of the Calendar item, the default is the user entering the Calendar. This is who will see the Calendar item in the CRM summary module.
- ❑ Select the Calendar Status. This is from CRM Task Statuses and indicates the percentage complete. A percentage can be manually entered if applicable.

CRM Actions

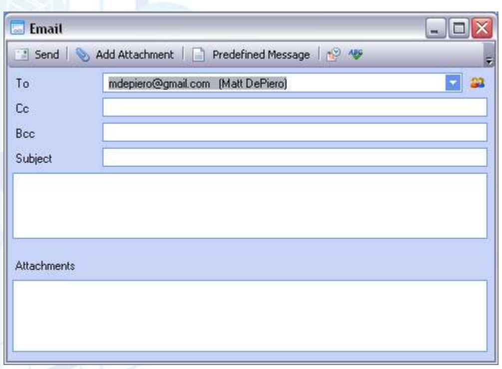
Phone Call



- ❑ A phone call can be added and related to a contact. It can also be related to a project or a task if applicable.
- ❑ If the phone call relates to a project, enter the project. Only projects that relate to the contact can be selected.
- ❑ Select the phone conversation that is to be used.
- ❑ Enter the notes about the conversation point in the second text box. Select Enter and the notes will go to the main text box and the next conversation point will display.
- ❑ At any point, the primary note being created by using the conversation template can be amended.
- ❑ Once a phone call has been completed select Save. The notes made from the conversation can be viewed in the Notes tab of the contact/company/project that it was related to.

CRM Actions

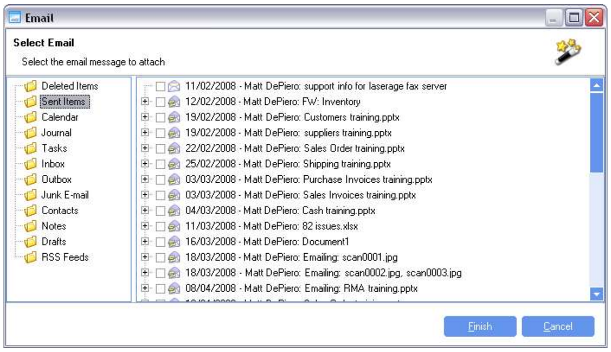
Send Email



- ❑ An email message can be sent to a contact. When using the action from CRM Companies, email addresses from all contacts for the company can be selected in the drop down.
- ❑ Predefined email addresses can be selected and used to automatically populate the email. The user can make any required changes before sending.
- ❑ Additional email addresses can be selected from the address book using the icon next to the email address.
- ❑ Sent emails will be displayed as notes against the contact and company.

CRM Actions

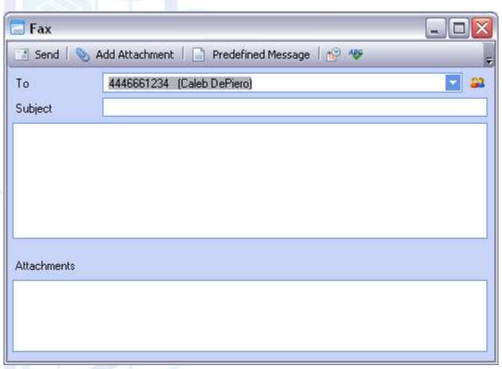
Import Email



- ❑ Importing an email will work with Outlook Clients.
- ❑ Selecting the action will display all Outlook folders.
- ❑ Select the email to import. The email will automatically be attached to the active record in the active module.
- ❑ For example, When in CRM projects, the import email will attach to the selected CRM project.
- ❑ To view imported emails, use the Documents tab (beside the Actions Panel).

CRM Actions

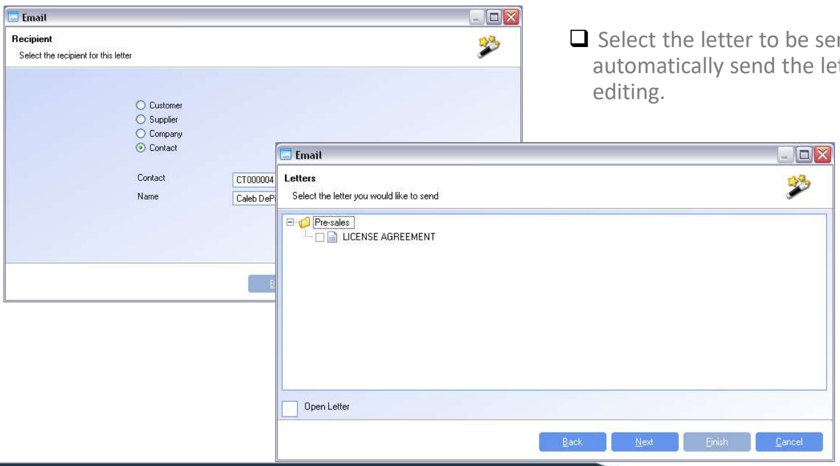
Send Fax



- ❑ A Fax can be sent to a contact.
- ❑ The fax number will default from the contact or the company fax number depending on where the Send Fax action is initiated from
- ❑ A Fax plug-in is required and needs to be set-up for this action to work.
- ❑ Multiple fax numbers may be used, depending on how the fax plug-in is set-up.
- ❑ Sent emails will be displayed as notes against the contact and company.

CRM Actions

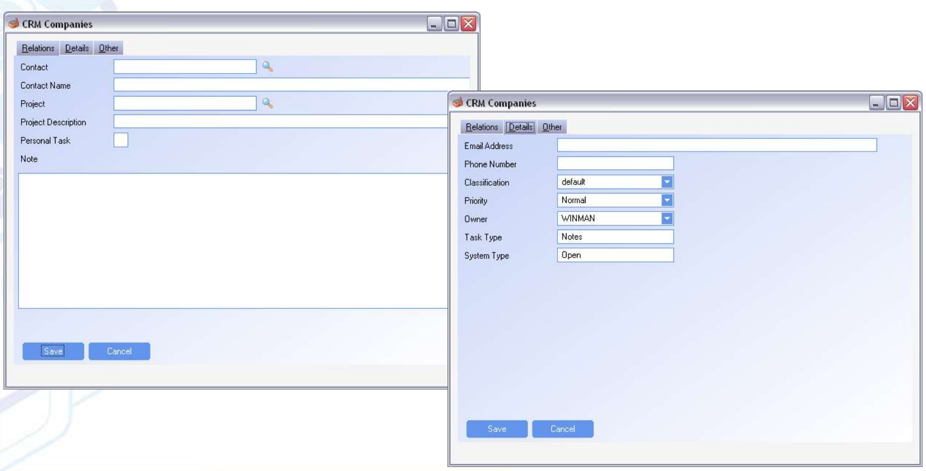
Send Letter



- ❑ A mail merge letter can be sent to a contact, customer, supplier or company.
- ❑ Select the letter to be sent and WinMan can automatically send the letter or it can be opened for editing.

CRM Actions

Add Notes



CRM Actions

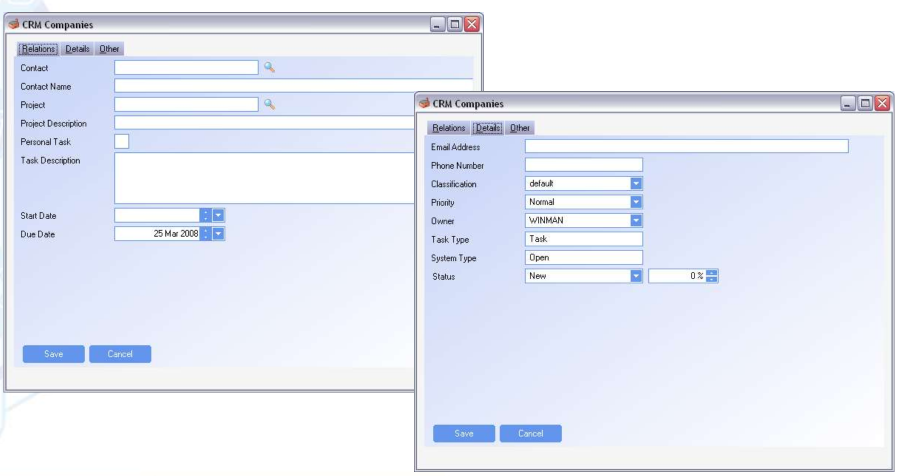
- Notes can be added and related to a project, contact, both or neither
- If the note relates to a contact, enter the contact name. Only projects that relate to the contact may be selected.
- If the note relates to a project, enter the project. Only contacts that relate to the project can be selected
- If the note does not relate to a project or a contact, select the check box for Personal task and no contact or project is required to be selected.

Details Tab

- Select the CRM Task Classification
- Select the priority. Available options include High, Normal and Low.
- Select the owner of the note, the default is the user entering the note. This is who will see the note in the CRM summary module.

CRM Actions

Add Task



CRM Actions

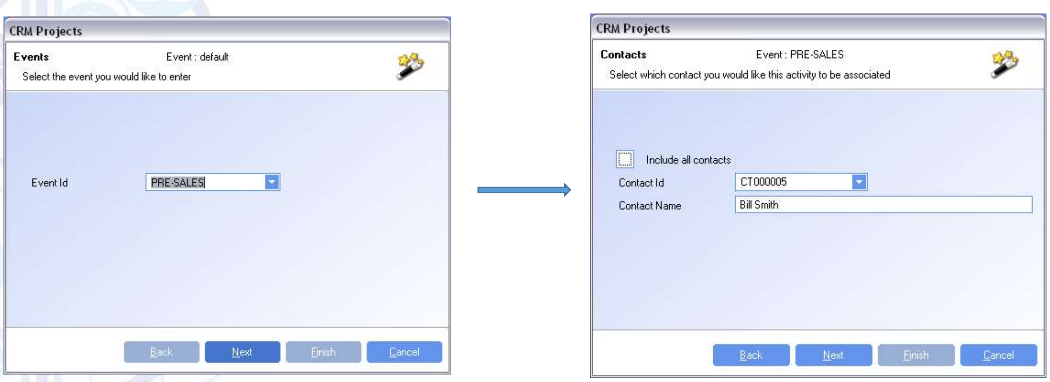
- A CRM Task can be added and related to a project, contact, both or neither.
- If the Task relates to a contact, enter the contact name. Only projects that relate to the contact may be selected.
- If the Task relates to a project, enter the project. Only contacts that relate to the project can be selected.
- If the Task does not relate to a project or a contact, select the check box for Personal task and no contact or project is required to be selected.

Details Tab

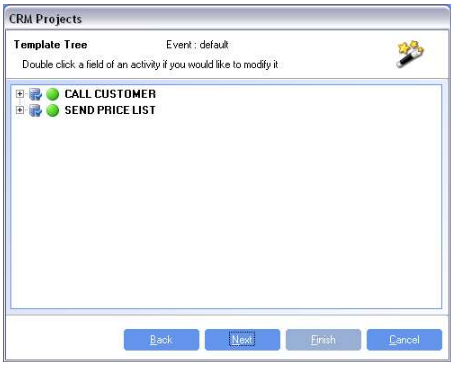
- Select the classification. This is from CRM Task Classifications and will indicate what is to be done for the Task.
- Select the priority. Available options include High, Normal and Low.
- Select the owner of the Task, the default is the user entering the Task. This is who will see the Task in the CRM summary module.
- Select the Task Status. This is from CRM Task Statuses and indicates the percentage complete. A percentage can be manually entered if applicable.

CRM Actions

Add Event

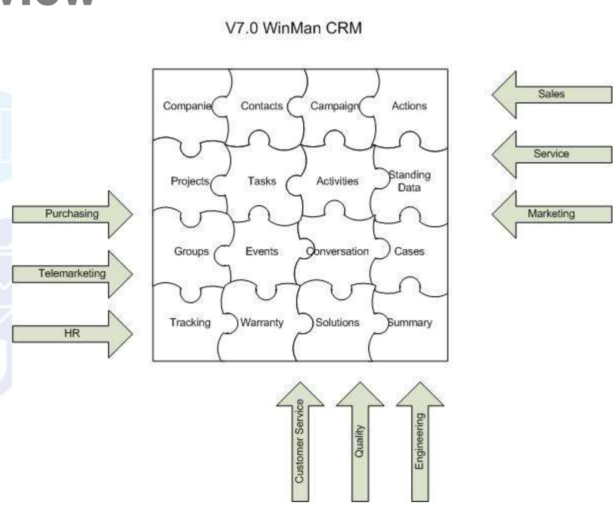


CRM Actions



- ❑ Select the CRM Event that is to be used.
- ❑ The CRM Event must be related to a contact. A project can also be selected to relate the event to, but is not required.
- ❑ All of the tasks that have been created against the CRM Event will be displayed. Double click the task to change any details before it has been created.
- ❑ Selecting Finish will create the tasks and appointments against the contact and project.

CRM Overview

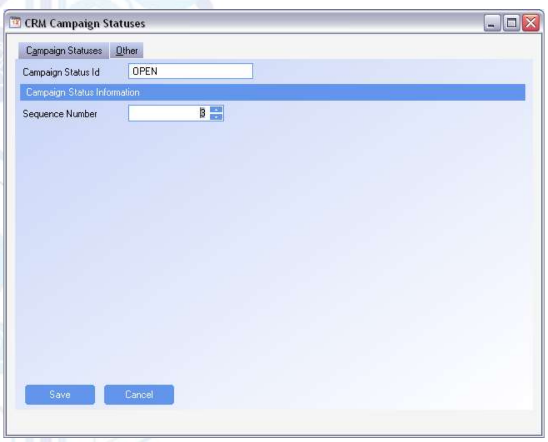


CRM Campaign

- ❑ CRM Campaigns are used as a high level activity that groups Projects.
- ❑ CRM Campaigns are a TOOL, and can be used in many different ways depending on the desired end result.
- ❑ Typically they would be used to identify a marketing activity that is to be tracked. This could be general such as Trade Show or specific like New York Trade show. How a campaign is set up is dependant on the level of detail required.
- ❑ CRM Projects and CRM Contacts can be created from the CRM Campaign module using the New Project and New Contact actions.

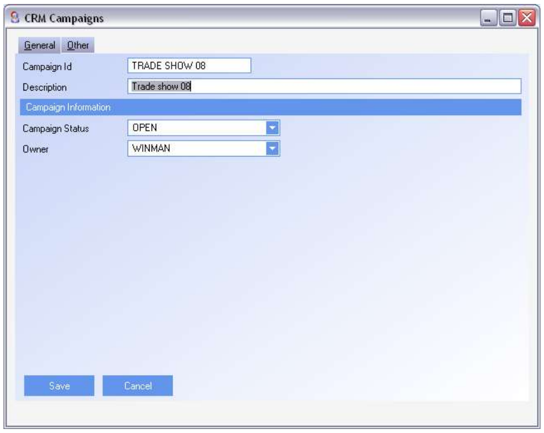
CRM Campaigns

CRM Campaign Statuses



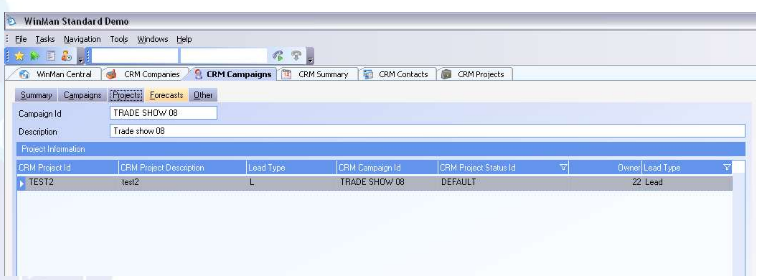
- ❑ CRM Statuses provide a status of the campaign.
- ❑ This can be as simple as Open and Completed. It could also include other statuses such as Stage 1 – Pre-Launch.
- ❑ Statuses are information and can be as detailed as required.
- ❑ A sequence number is provided to sequence the order the status will appear in when selection is taking place in the Campaign.

CRM Campaigns



- A CRM campaign is used to group CRM projects.
- A CRM campaign has a CRM campaign status for information.
- The owner of the campaign will see the campaign in CRM Summary on the My Campaigns tab.

CRM Campaigns



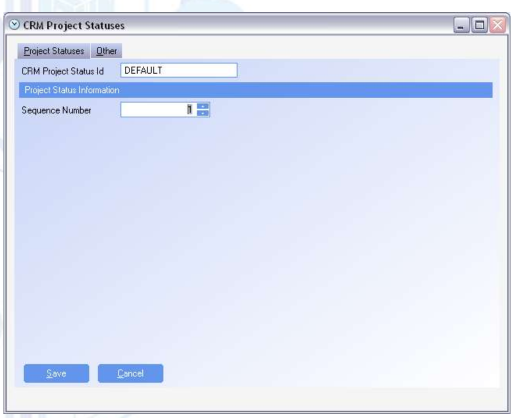
- Projects related to the Campaign can be viewed on the Projects tab. Right clicking on the project offers a Drill down to the project.
- The forecast for the campaign can be entered using the Add Forecast action and viewed on the forecast tab. A dashboard can be created to compare the forecast to the actual results.

CRM Projects

- CRM Projects are a collection of tasks, appointments and notes or a CRM Project can also be a collection of contacts.
- CRM Projects are used for events that typically extend over at least a couple of days and have multiple steps that need to be tracked.
- CRM Projects can be used for Customers, Suppliers, Leads and Opportunities.
- New Contacts can be added from the CRM Projects module using the New Contact Action.

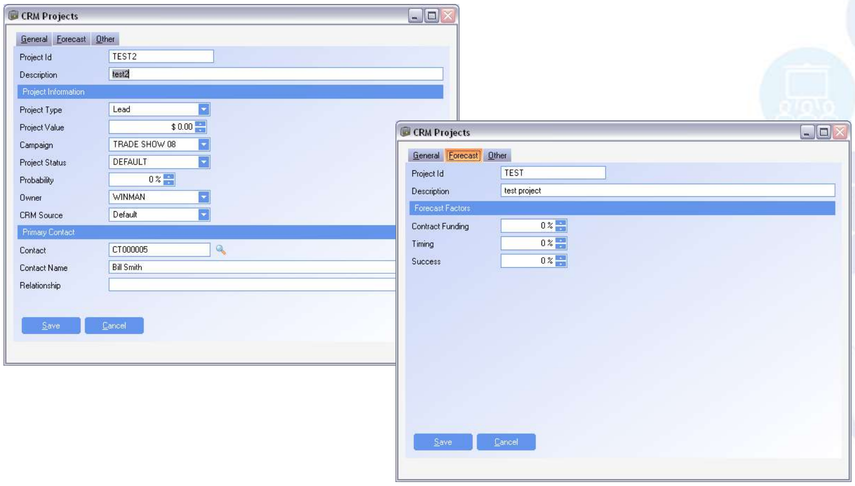
CRM Projects

CRM Project Statuses



- CRM Project Statuses provide a status of the project.
- This can be as simple as Open and Completed. It could also include other statuses such as Stage 1 – Initial.
- Statuses are information and can be as detailed as required
- A sequence number is provided to sequence the order the status will appear in when selection is taking place in the Project

CRM Projects



CRM Projects

- **Project ID** – The project ID can be a number or code of any kind. Like part numbers, they can be a sequential number, semi-intelligent or intelligent.

- **Project Description** – The description of the project.

- **Project Type**
  - **Lead** – Used for potential customers/contacts. Typically used to group multiple contacts together. A Lead type project could be used to include all contacts gathered from a marketing campaign.
  - **Opportunities** – Used to manage a sale that takes an extended period of time. Typically used for potential customers but also used with existing customers.
  - **Customer** – Used for current customers/contacts. Customer projects could be anything from a price renegotiation to a credit review.
  - **Supplier** – Used for current suppliers/contacts. Supplier projects could be anything from re-quoting a series of products to establishing a Kanban relationship.

CRM Projects

- **Project Value** – The potential value of the project. This is typically used with opportunities only to measure potential sales.
- **Campaign** – The campaign that the project relates to. Mostly used with opportunity type projects but could also include Lead type projects.
- **Project Status** – The status of the project. Project statuses are defined in the Project Statuses module
- **Probability** – The probability that the project will be completed. This is typically used with opportunities to measure potential sales.
- **Owner** – The WinMan user responsible for the project. The owner will view the project in their CRM Summary module.
- **CRM Source** – The CRM Source that relates to the CRM Project.
- **Primary Contact** – The primary contact for the project.

CRM Projects

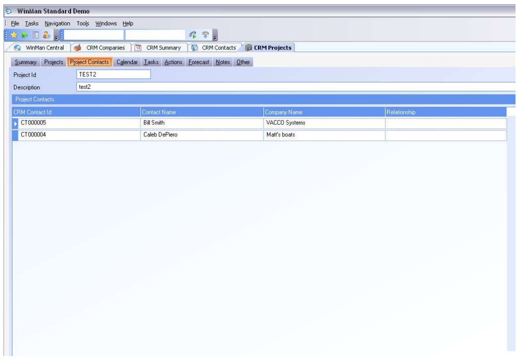
Forecast Tab

- **Contract Funding** – Used typically with Opportunities as a measure to determine how close the opportunity is to converting to a sales order.
- **Timing** – Used typically with Opportunities as a measure to determine how close the opportunity is to converting to a sales order.
- **Success** – Used typically with Opportunities as a measure to determine how close the opportunity is to converting to a sales order.

Note: The labels of the three fields can be changed to more accurately represent items that are measured when converting an opportunity to a sales order.

CRM Projects

Project Contacts Tab



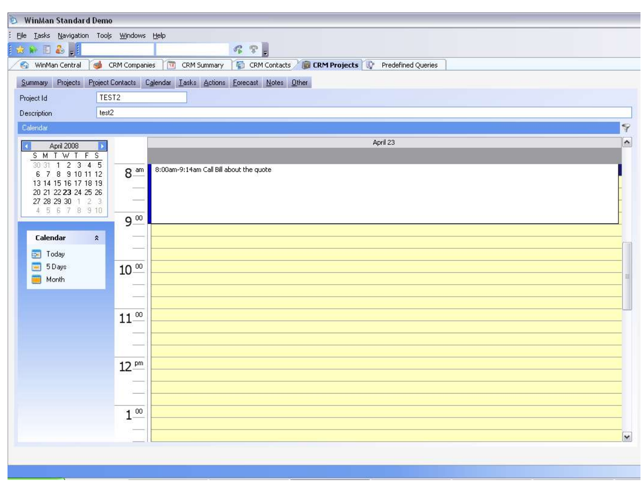
- ❑ Multiple contacts can be added to a project and viewed on the Project Contacts tab.
- ❑ Multiple contacts can be added if a project is used to gather all contacts gained from a marketing event or if a mass mailing is to be done.
- ❑ Individual contacts can be added to the project using the Add Project Contact Action.
- ❑ Multiple CRM contacts can also be added to a project using the Import Contacts action. A predefined-query or spreadsheet can be used to select a group of contacts for a project.

Note: When using the import contacts action, the contact must exist in CRM contacts first.

CRM Projects

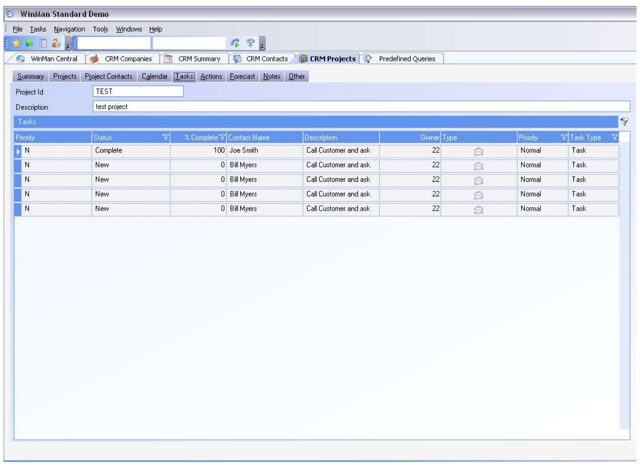
Review Calendar

- ❑ Use the Calendar Tab to view all calendar events for the project.
- ❑ Calendar can be viewed by selecting the option on the left side of the tab;
  - ❑ Today
  - ❑ 5 Days
  - ❑ Month
- ❑ Advance the Calendar to view future Calendar items.



CRM Projects

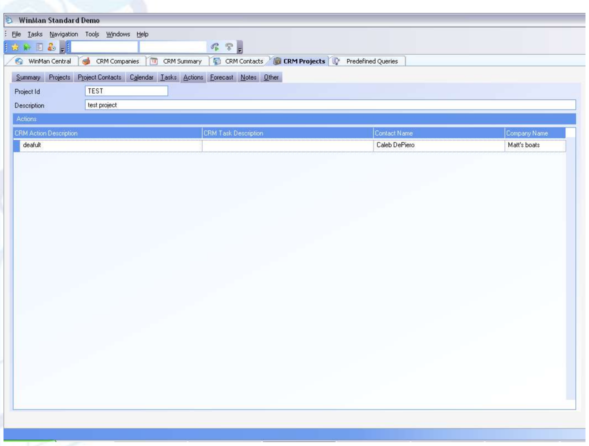
Review Tasks



- ❑ Use the Tasks Tab to view all tasks for the project.

CRM Projects

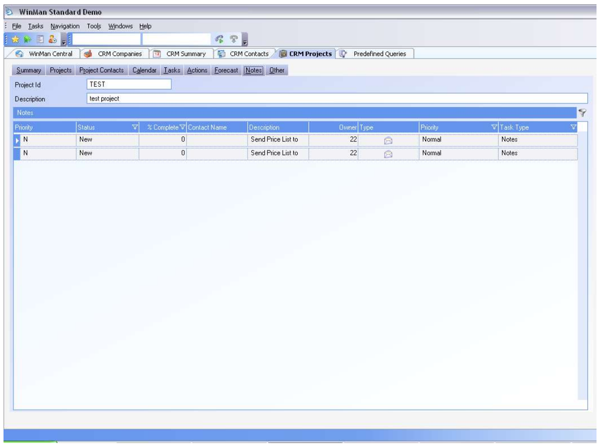
Review Actions



- ❑ The actions tab will show all actions that have been completed against the project.
- ❑ This will include any phone call, emails, or faxes.

CRM Projects

Review Notes

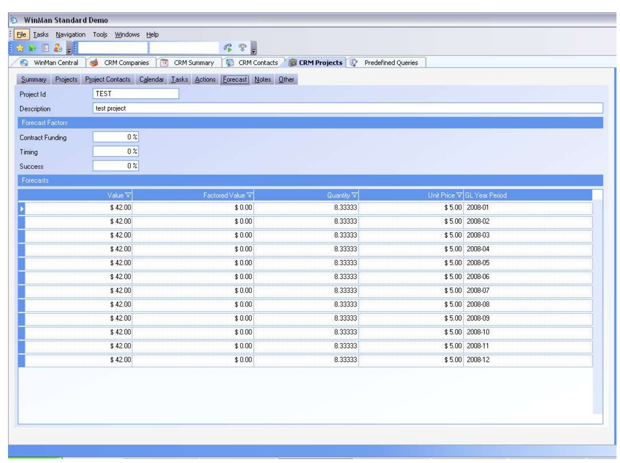


- ❑ The notes that have been made against a project can be reviewed using the Notes Tab.
- ❑ Right click on the line item to view or modify the entire note.

CRM Projects

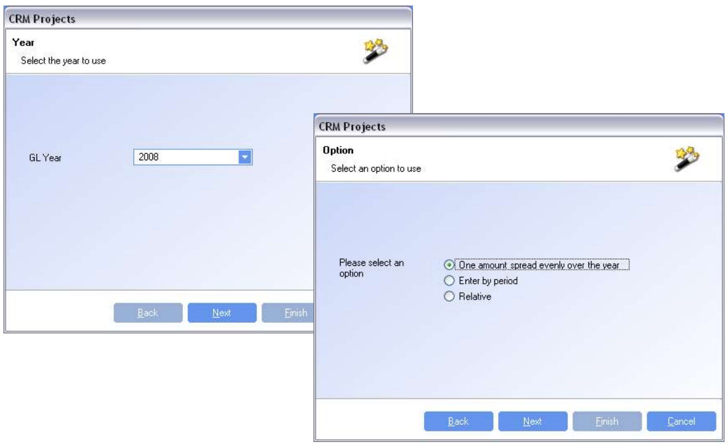
Forecast

- ❑ A forecast can be made for a project and viewed on the Forecast tab.
- ❑ Measuring the forecast against actual values would have to be done by a dashboard or report.



CRM Projects

Add Forecast Action

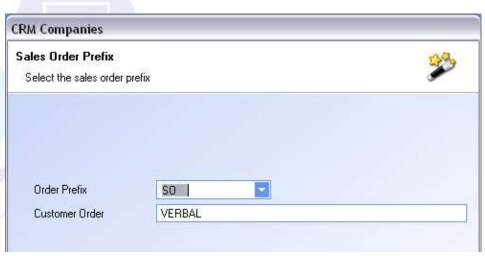


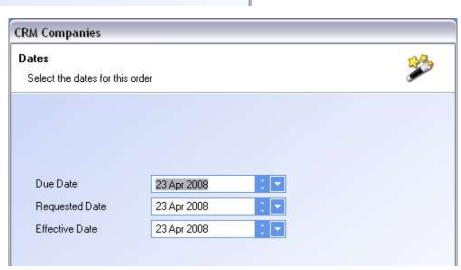
- ❑ A forecast is entered for a year.
- ❑ The forecast value can be entered 1 of 3 ways;
- ❑ **One amount spread evenly over the year** – Enter a quantity and a price and the value will be spread over 12 periods.
- ❑ **Enter by period** – Enter the quantity and price for each period.
- ❑ **Relative** – Enter a project, the budget year you are comparing to and percent of that budget to create the new budget values.

CRM Projects

Add Sales Order Action

- ❑ Add Sales Order action is available from;
  - ❑ CRM Projects
  - ❑ CRM Companies
  - ❑ CRM Contacts





CRM Projects

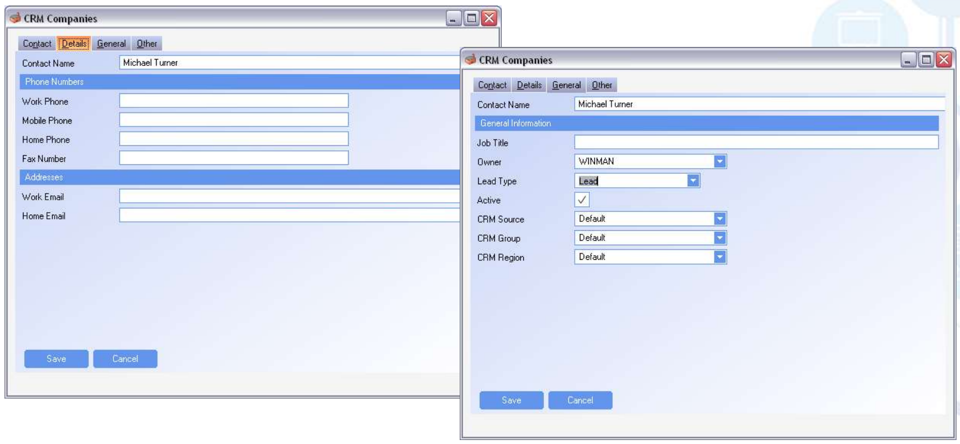
- Sales Orders and Quotes can be added to a CRM company using the Add Sales Order action.
- Companies that have been promoted to Customers can add firm sales orders or quotes.
- Companies that have not been promoted to Customers can only add quotes.
- The default project contact will be the default contact for the sales order, and the selected project will act as a default project. Only contacts related to the project can be selected.
- Select an Order prefix and for firm sales orders, specify the customer PO.
- The currency will default from the CRM company and price lists can only be selected from price lists related to the customer record.
- The date information will be applied to the header of the quote or sales order
  - **Due Date** – The date the order is to ship
  - **Requested Date** – The date the customer has requested the item
  - **Effective Date** – The order date

CRM Contacts

- CRM Contacts are used to store all contacts. A contact must relate to a company, which can be a customer, supplier or lead. Many contacts can be related to the same company.
- Notes, actions, tasks and appointments can be stored against a contact for a complete contact history.
- New CRM Companies can be created in CRM Contacts when a contact is added and new CRM Projects can be created using the New Project action.

CRM Contacts

New Contact



CRM Contacts

- New Contacts can be added to a company in the following modules;
  1. CRM Companies
  2. CRM Contacts
  3. Customers
  4. Suppliers
- Details Tab of adding a contact allows you to track;
  - Work Phone
  - Mobile Phone
  - Home Phone
  - Fax Number
  - Work Email
  - Home Email
- Additionally on the General Tab the following fields are provided;
  - **Job Title** – The contact's job title
  - **Owner** – The WinMan user who is responsible for the contact
  - **Lead type** – The type of contact
  - **Active** – If the contact is active
  - **CRM Source** – The CRM source of the contact
  - **CRM Group** – The CRM group of the contact
  - **CRM Region** – The CRM region of the contact

CRM Contacts

SYSTEM SETTING:
By default the contact title field has choices of MR, MRS, MISS, MS and DR. This list can be altered using the Addressing system setting **Default salutations for use with the title field**. Enable the option, and in the value field enter the choices using a; to separate the choices i.e. MR, DR,MRS.

SYSTEM SETTING:
By default the contact ID length is set to 15 characters. The Contact ID length is adjustable using the CRM system setting **CRM Contact identifier length**. Enable the system setting to reduce the number of characters found in the contact ID by entering the required number of characters in the value field. 15 characters is the maximum number of characters allowed.

SYSTEM SETTING:
By default the prefix for the contact ID is CT. The prefix can be amended using the CRM system setting **CRM Contact identifier prefix**. Enable the system setting and enter the required prefix in the value field.

SYSTEM SETTING:
CRM Projects, CRM Campaigns, CRM Contacts, and CRM Companies all have dashboards as a Tab. The dashboards can be removed using the CRM system setting **Show dashboards in CRM programs**. Enabling this setting and setting the value to N will turn off all dashboards in the aforementioned CRM modules.

CRM Contacts

Review Tabs

- **Calendar** – The Calendar tab will display all appointments that have been related to the contact.
- **Tasks** – The Tasks tab will display all the tasks that have been related to the contact.
- **Actions** – The Actions tab will display all the actions that have been completed for the contact.
- **Notes** – The Notes tab will display all the notes that have been made against the contact.
- **Project** – All the projects that the contact is related to will be displayed. This includes all projects regardless of if the contact is the default contact.
- **Other Contacts** – All the contacts that have been added to the contact's company can be found on the Other Contacts tab.
- **Cases** – All the open CRM support cases for the contact can be viewed.

CRM Contacts Actions

Import Contacts

- ❑ Contacts can be imported to WinMan using a predefined query or a spreadsheet.
- ❑ Contacts that are being imported can be added to existing companies or new Companies can be created during the import process.

CRM Contacts Actions

Tools

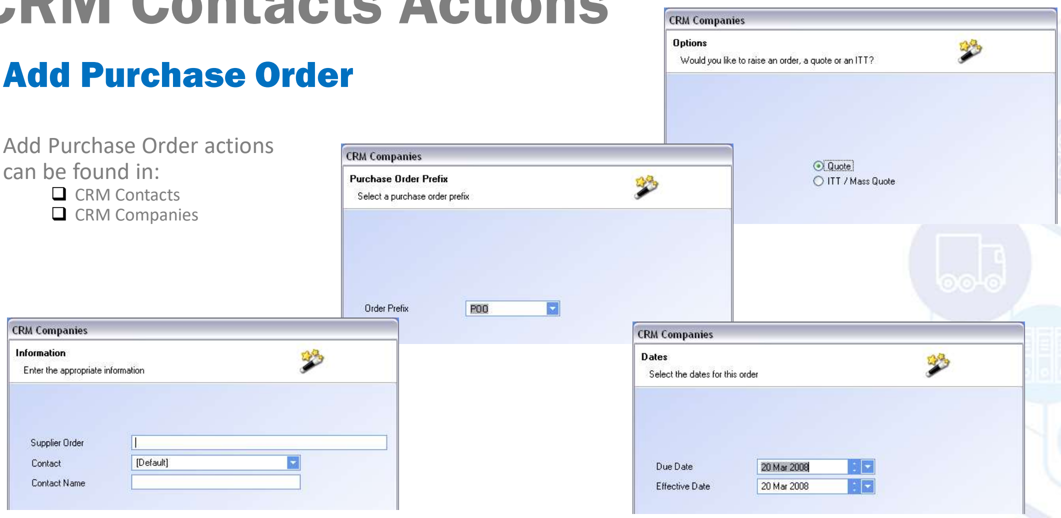
- ❑ A contact can be moved from their current company to any other company found in the CRM Company database.

CRM Contacts Actions

Add Purchase Order

Add Purchase Order actions can be found in:

- ❑ CRM Contacts
- ❑ CRM Companies



CRM Contacts Actions

- ❑ Purchase Orders and Quotes can be added to CRM company using the Add Purchase Order action.
- ❑ Companies that have been promoted to Suppliers can add firm purchase orders or quotes.
- ❑ Companies that have not been promoted to Suppliers can only add quotes.
- ❑ The supplier/company that is selected will be the company/supplier used to add the sales order.
- ❑ A single quote or purchase order can be selected or an ITT (Information To Tender)/Mass Quote can be sent to multiple companies.
- ❑ Select an Order prefix for the order.
- ❑ A supplier order can be entered if applicable and the contact name can be selected from the CRM contacts or typed manually.
- ❑ The date information will be applied to the header of the quote or purchase order
  - ❑ **Due Date** – The date the order is to be received
  - ❑ **Effective Date** – The order date

CRM Companies

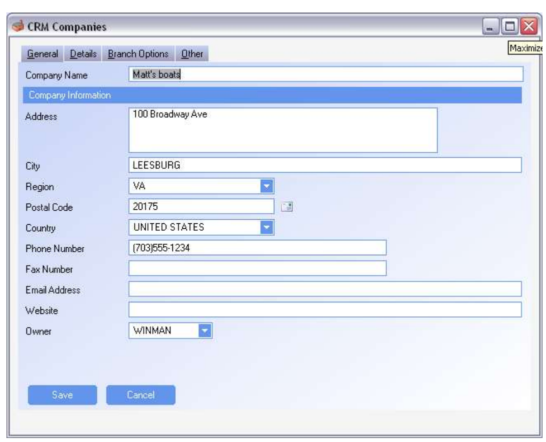
CRM Companies are used to hold suppliers, customers and leads. CRM companies that are customers also exist in the Customer table and a change made in either CRM Companies or Customers will update the related record. Supplier work in the same manner.

CRM Companies can have multiple contacts related to the company. Every CRM Contact record must be related to a CRM Company record.

CRM Companies

General Tab

- ❑ A company that is added to the CRM module is classified as potential customer or potential supplier.
- ❑ A company must be promoted to a customer or supplier before a firm order can be placed.
- ❑ Quotes can be entered for non-customers and non-suppliers. The company must be promoted to a customer or supplier before the quote can be converted.
- ❑ Companies are added by using the action New Company.



CRM Companies

- **Company Name** – The name of the Company.
- **Address, City, Region, Postal Code and Country** – The address information for the company.
- **Phone Number** – The general phone number for the company..
- **Fax number** – The general fax number for the company.
- **Email Address** – The general email address for the company.

Note: Phone, fax and email information is also stored for each contact. Phone, fax and email for the company are not contact specific.

- **Website** – The website of the company
- **Owner** – The WinMan user responsible for the company. This is used to identify companies for the CRM summary module.

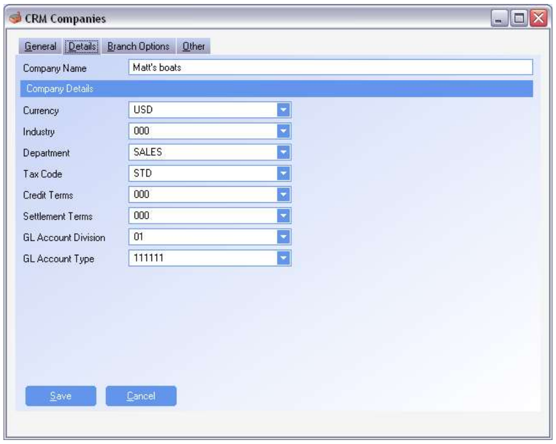
CRM Contacts

SYSTEM SETTING:
By default the company ID length is set to 8 characters. The Company ID length is adjustable using the CRM system setting **CRM Company identifier length**. Enable the system setting to reduce the number of characters found in the contact ID by entering the required number of characters in the value field. 15 characters is the maximum number of characters allowed.

SYSTEM SETTING:
By default the prefix for the company ID is CP. The prefix can be amended using the CRM system setting **CRM Company identifier prefix**. Enable the system setting and enter the required prefix in the value field.

CRM Companies

Details Tab



- ❑ While a company can be a customer and a supplier it is not recommended.
- ❑ Credit terms, Settlement terms, and GL account types are typically different in customers and suppliers even though they are the same company.
- ❑ Customers added from the Customers Module and Suppliers added from the Suppliers Module are automatically added to CRM.
- ❑ Changes made in Suppliers, Customers or CRM companies will sync records for consistency.

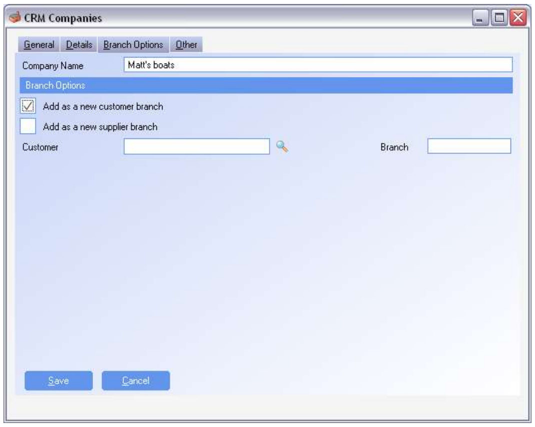
CRM Companies

- ❑ **Currency** – The currency of the company. Once the company is promoted this can no longer be modified
- ❑ **Industry** – The industry of the company.
- ❑ **Department** – The buyer or sales rep for the company.
- ❑ **Tax code** – The tax code used for the company.
- ❑ **Credit terms** – The credit terms for the company.
- ❑ **Settlement terms** – The settlement terms for the company.
- ❑ **GL account division** – The AR or AP division for the company when promoted.
- ❑ **GL account type** – The AR or AP account for the company when promoted.

Note: The above fields will update the customer or supplier record if modified (with the exception of currency which can not be modified.

CRM Companies

Branch Options Tab



- ❑ A new company can be added as a branch to an existing customer or supplier.
- ❑ Once an option has been selected select the customer that the branch should be added to and specify the branch.

Note: The next sequential branch number will default as the branch

- ❑ Each Company in CRM will have a unique Company ID. Branches only relate to Customers and Suppliers.

CRM Companies

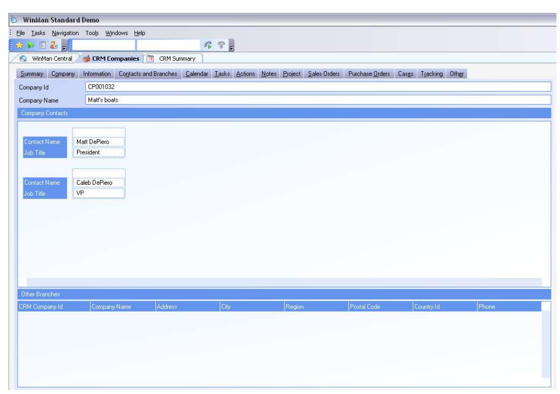
Contacts and Branches

- ❑ Contacts related to the company will display.

Note: For customers and suppliers contacts are specific to a branch. Branch 0001 contacts are separate from Branch 0000 contacts.

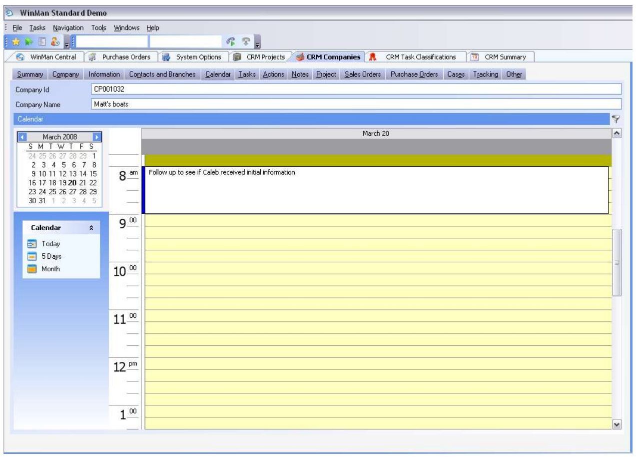
- ❑ All branches for the customer or supplier can also be viewed.

Tip: If a branch exists, right click on the line for drill down options.



CRM Companies

Review Calendar

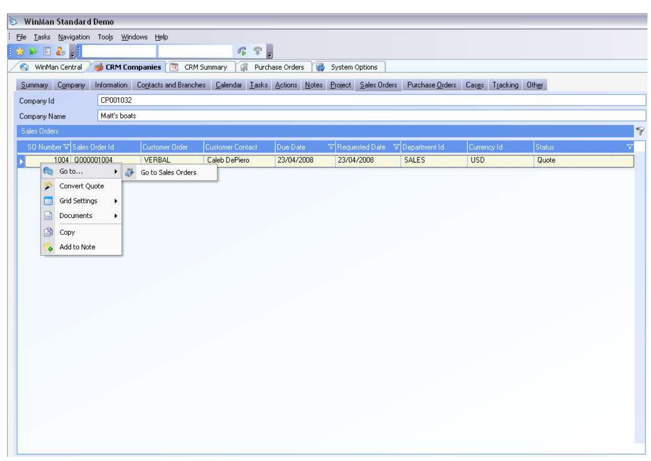


- ❑ Use the Calendar Tab to view all calendar events for the company. This will include all Calendar items for all the company's contacts.
- ❑ Calendar can be viewed by selecting the option on the left side of the tab;
  - Today
  - 5 Days
  - Month
- ❑ Advance the Calendar to view future Calendar items.

CRM Companies

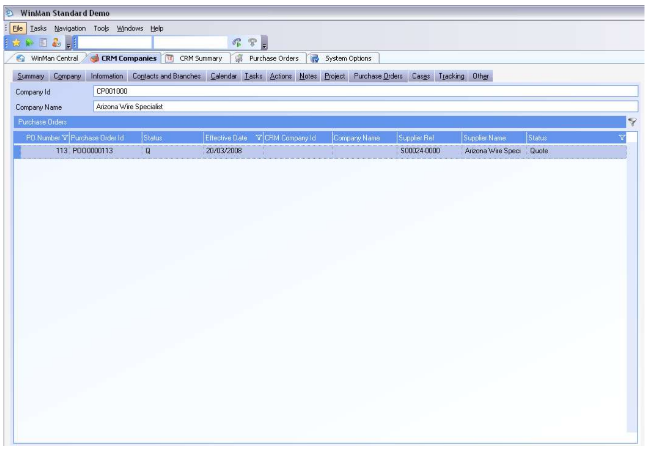
View Sales Orders

- ❑ Sales orders and quotes can be viewed from the Sales Orders Tab.
- ❑ The sales orders tab can only be viewed if an open quote or sales order exists for the company.
- ❑ Quotes can be converted from the Sales Orders Tab by right clicking on the quote and selecting Convert Quote.
- ❑ Quotes can only be converted for companies that have been promoted to a customer.



CRM Companies

View Purchase Orders

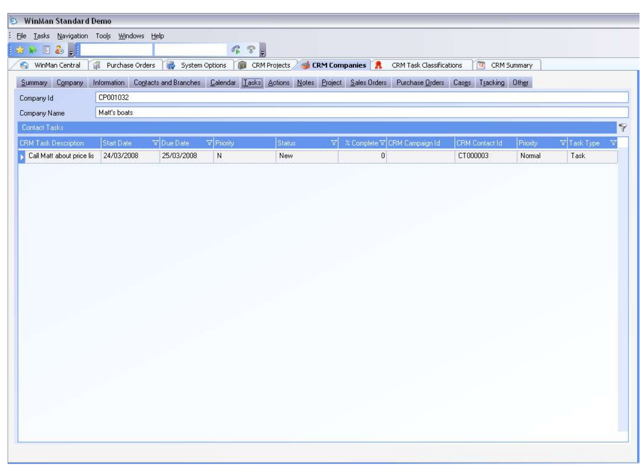


- ❑ Purchase orders and quotes can be viewed from the Purchase Orders Tab.
- ❑ The purchase orders tab can only be viewed if an open quote or purchase order exists for the company.
- ❑ Quotes can be converted from the Purchase Orders module by firming the quote.
- ❑ Quotes can only be converted for companies that have been promoted to a supplier.

CRM Companies

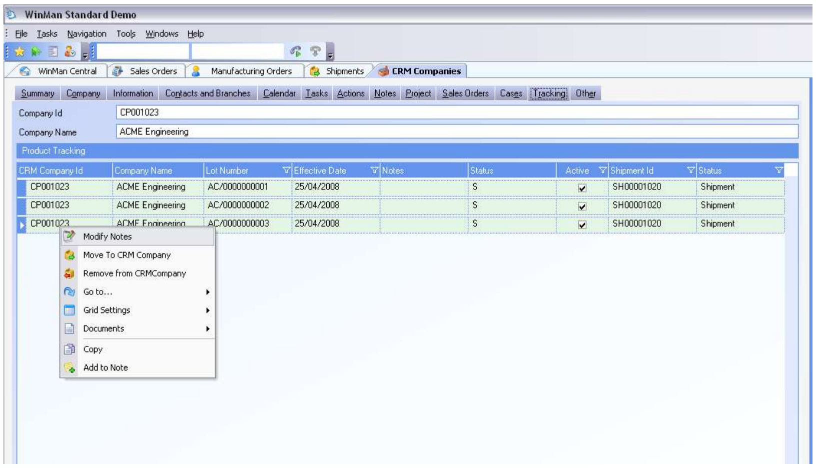
Review Tasks

- ❑ Use the Tasks Tab to view all tasks for the company. This will include all tasks for all the company's contacts.



CRM Companies

Tracking

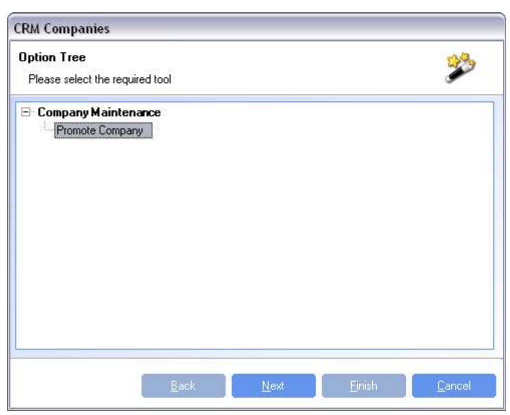


- ❑ Serialized items can be tracked by serial number using the Tracking tab
- ❑ Product tracking is turned on in Administration→ Standing Data → System Options → Settings → Track Product. Functionality can also be managed on a per product basis using the products module → Settings → Track product
- ❑ Items to be tracked must have the serial number option "Serial Number When Shipped" selected in products.
- ❑ Once an item is sold to a customer, it can also be moved to another customer by right clicking on the item and selecting "Move to CRM Company".
- ❑ An item can also be removed from the field by right clicking on the item and selecting "Remove from CRM Company".

CRM Companies Actions

Tools – Promote Company

- ❑ Use Action Tools to promote a company to a customer or supplier. Promoting to a customer or supplier will create a customer or supplier record.



CRM Support Cases

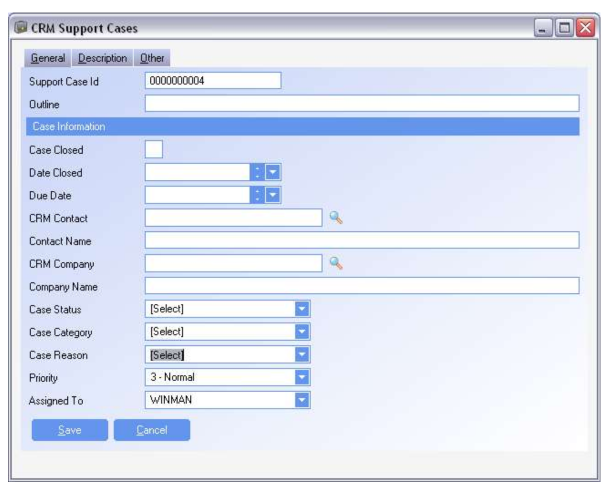
CRM Support Cases are used to manage after sale support of items. A support case can often be completed before a RMA is issued. Support cases can offer possible solutions and allow assignment to WinMan users for resolution

CRM Support cases can be added and viewed in the CRM Support Cases, CRM Companies, CRM Contacts and CRM Summary modules.

CRM Support Cases

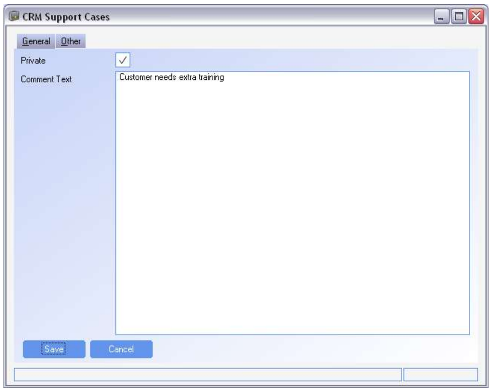
General Tab

- **Outline** – Specify a description of what the case is for.
- **Case Closed/Date Closed** – Designates if the case has been closed and when.
- **CRM Contact** – The contact for the support case. A contact is not required for each case.
- **CRM Company** – The company for the case. This is automatically populated if a contact is specified. A CRM Company is required for each case.
- **Case Status** – The status of the case used for information and reporting.
- **Case Category** – The category of the case used for information and reporting.
- **Case Reason** – The reason for the case used for information and reporting.
- **Priority** – Used to prioritize the case, and indicate importance to the person resolving the case.
- **Assigned to** – Who the case is assigned to for resolution.



CRM Support Cases

Adding Comments

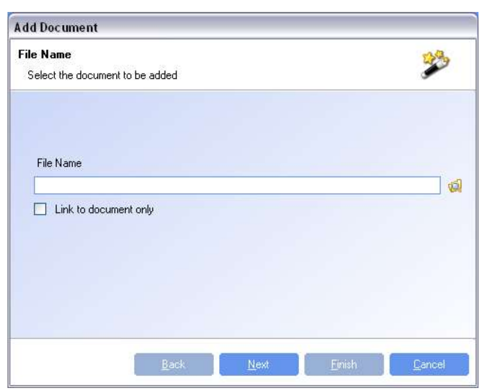


- Comments can be added to a case using the action Add comment.
- Comments can be marked as private. When a service rep is active with the customer private comments can be excluded from conversation
- All comments can be viewed on the Case Comments tab in the CRM Support case module and viewed by double clicking.

CRM Support Cases

Adding Documents

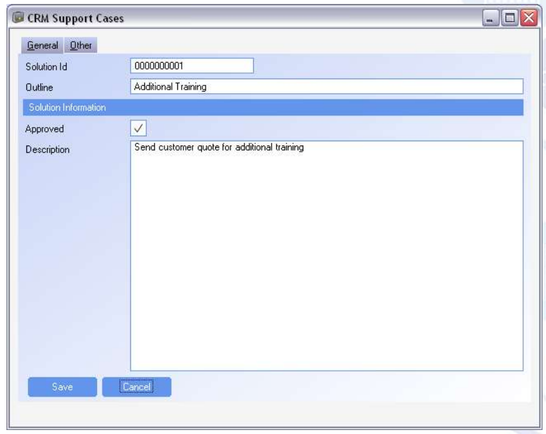
- Documents can be added to a case using the action Add documents.
- Documents could be any internal documents that could assist with the case or any documents that the customer may have sent in pertaining to the case.
- All documents can be viewed on the Documents tab in the CRM Support case module and viewed by double clicking.



CRM Support Cases

Adding Solutions

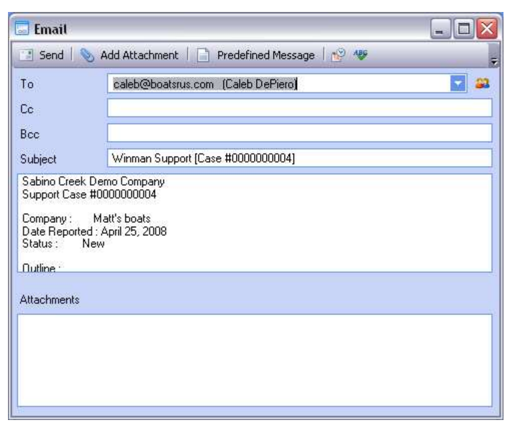
- ❑ Case solutions can be added using the Add solution action.
- ❑ Previously added solutions can be looked up using the Find Solution action.
- ❑ Multiple solutions can be attached to a case. Only solutions that actually provide a resolution should be marked as Approved.
- ❑ All solutions can be viewed on the General Tab of the Support Cases module



CRM Support Cases

Send Email

- ❑ The Email action will send a summary email to the customer with a status of the case.
- ❑ The email will include company, and contact information. It will also include non-private comments, the status of the case, a description of the case and any approved solutions.
- ❑ The email is created as a template and can be edited before it is actually sent to the customer.



CRM Summary

CRM Summary brings all the CRM modules together. A user can review all the items that they have ownership of. This includes;

- CRM Calendar items
- CRM Projects
- CRM Contacts
- CRM Tasks
- CRM Companies
- CRM Campaigns
- CRM Actions
- CRM Notes
- CRM Cases

CRM Companies

SYSTEM SETTING:
By default the number of CRM calendar events that will display in the CRM Summary screen is 50. This number can be altered to any number using the CRM Summary system setting **Number of CRMCalendar entries to show on opening page in CRMSummary.** To increase this number from 50 enable the option and enter the required number in the value field.

SYSTEM SETTING:
By default the number of CRM contacts that will display in the CRM Summary screen is 20. This number can be altered to any number using the CRM Summary system setting **Number of CRMContacts entries to show on opening page in CRMSummary.** To increase this number from 20 enable the option and enter the required number in the value field.

SYSTEM SETTING:
By default the number of CRM companies that will display in the CRM Summary screen is 20. This number can be altered to any number using the CRM Summary system setting **Number of CRMCompanies entries to show on opening page in CRMSummary.** To increase this number from 20 enable the option and enter the required number in the value field.

SYSTEM SETTING:
By default the number of CRM campaigns that will display in the CRM Summary screen is 20. This number can be altered to any number using the CRM Summary system setting **Number of CRMCampaigns entries to show on opening page in CRMSummary**. To increase this number from 20 enable the option and enter the required number in the value field.

CRM

SYSTEM SETTING:
By default the number of CRM projects that will display in the CRM Summary screen is 20. This number can be altered to any number using the CRM Summary system setting **Number of CRMProjects entries to show on opening page in CRMSummary**. To increase this number from 20 enable the option and enter the required number in the value field.

SYSTEM SETTING:
By default the number of CRM Actions that will display in the CRM Summary screen is 20. This number can be altered to any number using the CRM Summary system setting **Number of CRMActions entries to show on opening page in CRMSummary**. To increase this number from 20 enable the option and enter the required number in the value field.

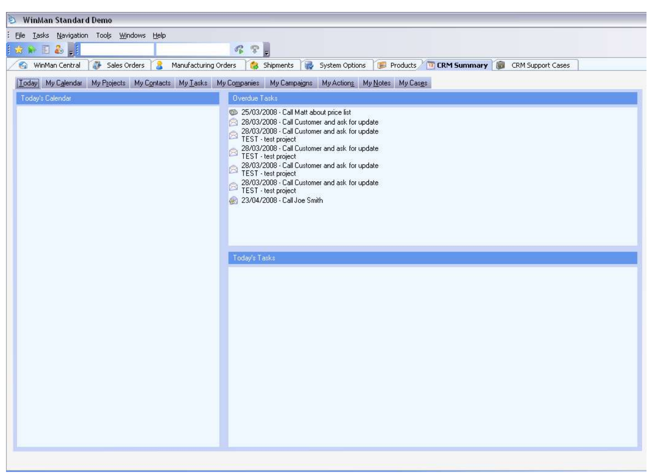
SYSTEM SETTING:
By default the number of CRM tasks that will display in the CRM Summary screen is 20. This number can be altered to any number using the CRM Summary system setting **Number of CRMTasks entries to show on opening page in CRMSummary**. To increase this number from 20 enable the option and enter the required number in the value field.

SYSTEM SETTING:
By default the number of CRM notes that will display in the CRM Summary screen is 20. This number can be altered to any number using the CRM Summary system setting **Number of CRMNotes entries to show on opening page in CRMSummary**. To increase this number from 20 enable the option and enter the required number in the value field.

CRM Summary

Today Tab

- The Today Tab will display all the Calendar items, overdue tasks and Today's tasks.



CRM Summary

Viewing others tasks

- In CRM Summary, all the WinMan users and departments are listed in the select area of the Actions panel.
- Click on a user to view their CRM items.
- To view all CRM items for a department, select the department.

Note: In the Users module each winman user can be linked to a department. By selecting a department, all of the department's users' CRM items can be viewed.

i.e. If I click on SALES, I will see all the CRM items for all the users that have SALES as their department.