Andersen CRM Marketing User guide v.1.0

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Introduction

Andersen CRM Marketing is the system developed for working with a customer database in order to optimize the business processes of the marketing Department. Our system let users:

- create contacts,
- import contacts from the file,
- easy access to contact data,
- using filters and sorts,
- export data.

User roles

Andersen CRM Marketing has the next user roles:

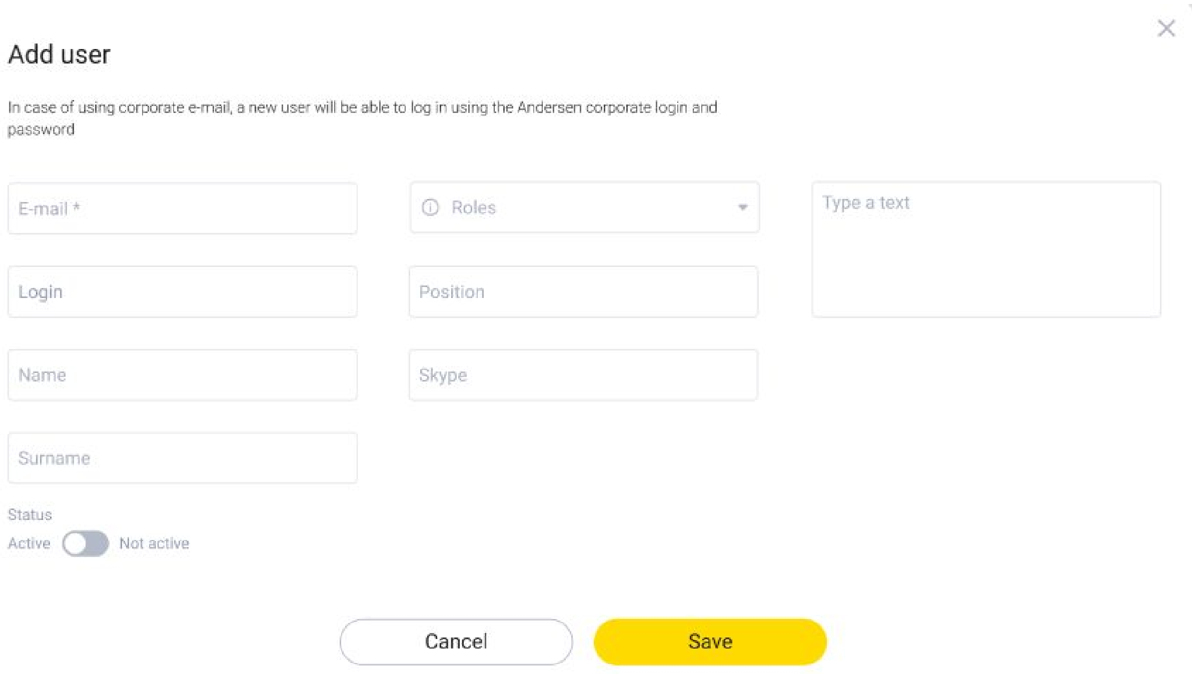
Role	**Description**
Admin	Administrator, who creates, activates and deactivates users.
NC1	Ordinary Network Coordinator, who fills the database.
NC2	Network Coordinator, who fills the jobs database.
Manager	Marketer, who works with the database.

Add and view users

Add, edit and view users can only user with the role Admin. All these functions are available on the “CRM Users” page.

Add user

1. Click on the “plus” icon in the up-right corner of the page.
2. Fill the form “Add user” (see Pic.1), paying attention to the required fields.
3. Click on the “Save” button.



Pic.1 Add user

View users

All users are displayed in the table “CRM users”. You can apply filters in the table header and select the user according to specified parameters.

Edit user

1. Click on the “edit” icon right of the user row.
2. Make necessary changes in the form “Edit user’s info”.
3. Save it.

Add contact

Add contact is available for user with the role NC1, NC2 or manager.

User with the role NC1/NC2

Main page for creating contacts for user with role NC1 or NC2 is the “Add contacts” page. There are daily plan scores and the table with today created contacts. Every morning the table “today’s contacts” is automatically refreshed.

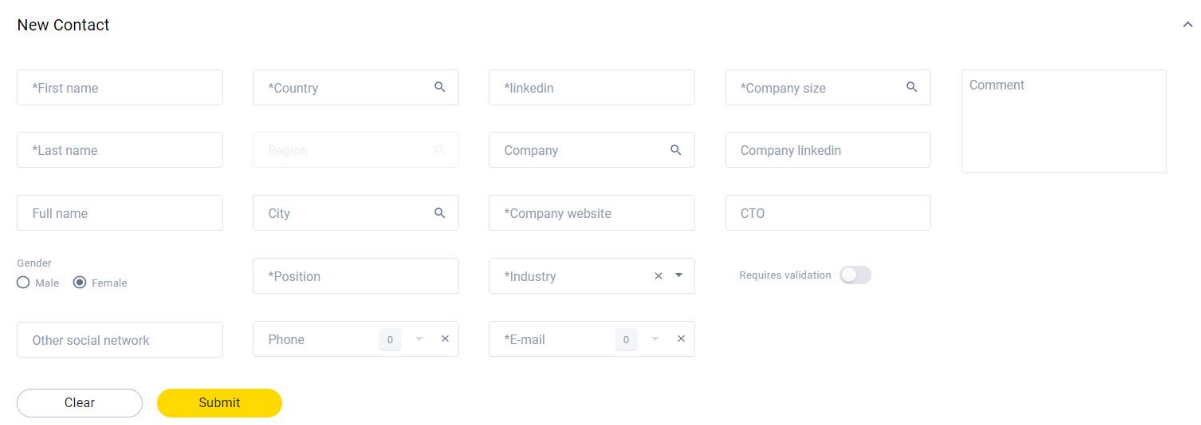
Creating contacts is also available on the “My contacts” page. On this page all created by NC contacts are displayed in the table “My contacts”. NC sees only its own contacts.

Add contact:

1. Open form “New Contact” (see Pic.2) on the “Add contacts” page.

2. Fill the “New Contact” form. Required fields are mentioned with the symbol “*“.

3. Press the submit button



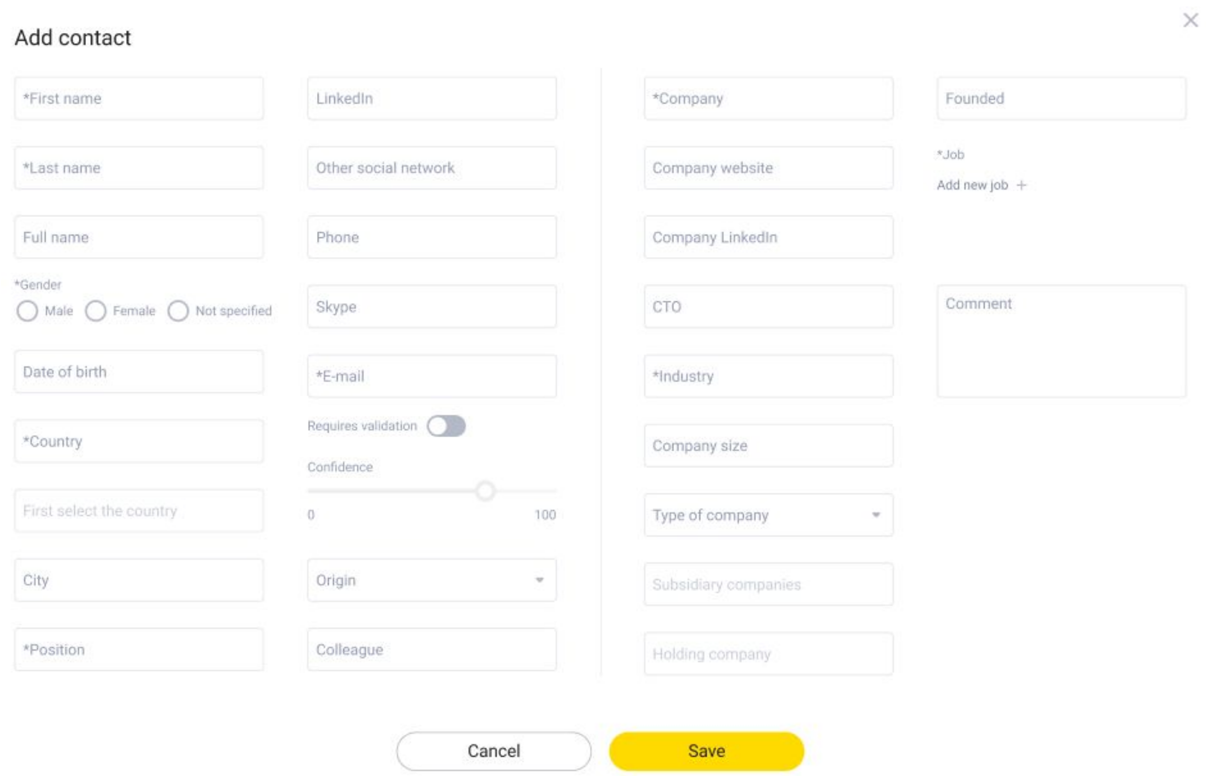
Pic. 2 New contact form

User with the role Manager

Main page for the Manager is the “All contacts” page. Manager sees all created by NC contacts.

Add contact:

1. Click the Add contact button.
2. Fill the “Add contact” form (see Pic.3). Required fields are mentioned with the symbol “*“.
3. Press the save button



Pic. 3 Add contact form

Edit contact

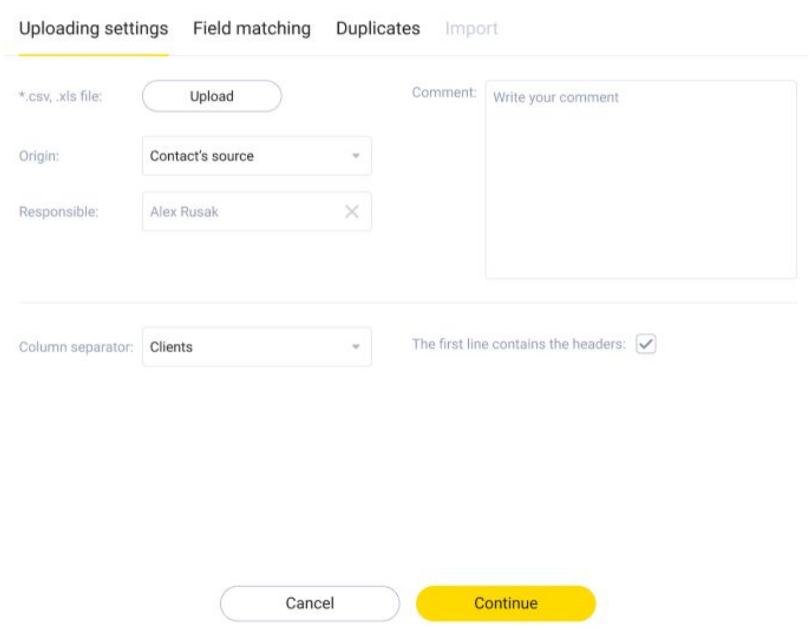
1. Press the “Edit” icon in the table.
2. Make changes.
3. Press the save button.

Delete contact

1. Press the “Delete” icon in the table.
2. Approve action.

Import contacts

1. Press the import icon. Modal window opens (see Pic.4).
2. On the upload setting tab:
    a. Upload csv or xls file.
    b. Choose separator in dropdown list. The coma is chosen by default.
    c. Select checkbox if the uploaded file consists of headers.
    d. Press the continue button.
3. On the field matching tab:
    a. Match columns in the file with data in the Andersen CRM Marketing.
    b. Press the continue button.
4. On the Duplicates tab choose action with the duplicates:
    a. Replace – existing data are replaced by the data from the file.
    b. Merge – only empty fields in the system are filled in with data from the file. Following fields are always replaced by data from the file:
        - Last touch;
        - Sequence;
        - Opens;
        - Views;
        - Deliveries;
        - Replies;
        - Bounces;
        - Status.
    c. Skip – the system skips duplicates. At the end of the import, the file with the missing data is available.
5. To start import press the continue button.



Pic. 4 Import modal window

Export contacts

Export data is available only for the Manager.

1. Press the export icon.
2. The system downloads the file with all settings to the folder storage/importFiles/"userId.