

# CRM Daily processes

Entersoft CRM® 3.0

User Guide

## Identity

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## MANUAL AIM

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The aim of this manual is:

- The introduction and familiarity with the Entersoft CRM environment and the main concepts such as, **persons management** and **resources management**.
- The provision of the necessary information for **tasks** management, **calendars**, **knowledge base** as well as the presentation of the functionalities to the user that is provided through the Entersoft CRM connection with the **MS Outlook**.
- The presentation of sales management through **Leads** and **Sales Opportunities**
- User guidance which aims to obtain the **System Parameterization** of Entersoft CRM

Prerequisites for the smooth execution of the daily tasks as well as the use of the current manual, are:

- ✓ **The knowledge** of the **system environment**, the **keyboard** and **mouse handling**, as well as the configuration of the appropriate menus and shortcut bars, according to the general guidelines found in the *Operation Environment* manual. The cooperation between the users and the installation-trainee supervisor is recommended.
- ✓ **The execution of all the necessary** system **starting & configuration actions**.
- ✓ **The right equipment set up** that is used, and the parameterization of the application server, the clients, the data base, the printers etc. from a technician trained and suggested from Entersoft.

# PERSONS MANAGEMENT

## HOW DO I ENTER A LEGAL ENTITY

In order to enter a legal entity, we select from the CRM menu [New\Legal Entity](#)

Through the [fast insert form](#) we can complete fields that concern the Identity of the legal entity (Name, TRN, TAX OFFICE, VAT Regime), Professional and Grouping data (Profession, Group, Category etc).



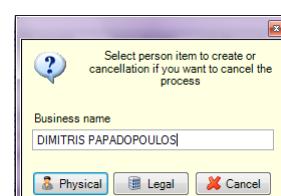
In the [Addresses/Telephones](#) page, we can enter more than one address (head office, branches, warehouse etc) and define which one is the person's main address.

**Multiple addresses**

In the [Relations](#) page and by typing to the [Name](#) column, a dialog appears, where we can select a person as a "contact" or select the [Create new](#) button in order to create a new person.

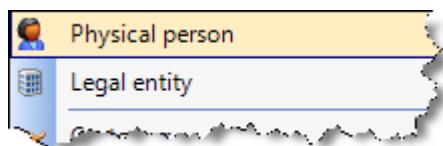
In case we select [Accept](#), in [Relations](#) page a new entry for this person is completed and we can define additional fields of the relation such as the Relation type, the segment, the position, the email address etc.

In case we select [Create new](#), we must define the type of the person (Physical, Legal) and continuing to complete the related fields.



## How Do I ENTER A PHYSICAL PERSON

In order to enter a physical person we select from the Entersoft CRM menu [New\Physical Person](#)



Through the [fast insert form](#) we can complete fields that concern the Identity of the physical person (Name, TRN, VAT, Identification number, Profession, Address and communication data).

In the [Relations](#) page, in similar way, as we saw to the previous chapter, we can define more than one relations with persons (physical or legal) and continuing to complete the fields that define this relation.

The screenshot shows the 'Identity' tab of the Entersoft CRM fast insert form. The top section contains fields for Name (Karazanos Pavlos), Common name (Karazanos Pavlos), Gender (Unknown), Profession, and a Remark section. Below this is a 'Relations' section with a table showing a single entry: 'Retail customer' with a Relation type of 'Executive => M... ΠΩΛΗΣΕΙΣ', Department 'DEV', and Email 'ret@entersoft.gr'. The bottom right corner of the window has a small '...' button.

Name	Relation type	Department	Position	Email	From addr.	In address	Inactive
Retail customer	Executive => M... ΠΩΛΗΣΕΙΣ	DEV		ret@entersoft.gr			

## How Do I Manage Persons

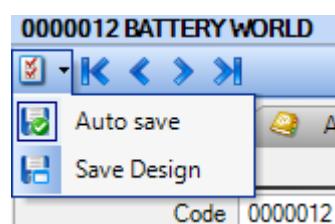
Persons management consists the main application of a CRM system. The basic data that are provided by Entersoft CRM concerning persons management, are the following:

- ✓ Physical and Legal persons fast insert entry forms
- ✓ Context scroller of persons management
- ✓ Automatic proposal of individuals first and last name cases based on grammar rules
- ✓ Functionality of multiple addresses, telephones, email, fax
- ✓ Relations between persons
- ✓ Actions of mass send – communications to persons

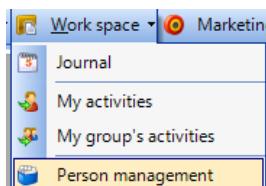
**Context Scroller Definition:** A context scroller provides a list of entities with the parallel functionality of current entry display and update through a user definable form. It is divided in a parameters area, an entries list area and finally an area with the management form of the selected entry. Besides modifications, it allows the insertion of new entries.

The Entersoft CRM provides a number of context scrollers (Leads administration, Opportunities, Service Folders, Campaigns, Events etc.) The following example concerns the context scroller Person Management that described below.

The user can select alterations Auto Save when the current entry is modified, without being necessary to answer to the question Save modifications? For select an entry, the user can use the buttons appearing to the horizontal toolbar on the top of the selected entry.



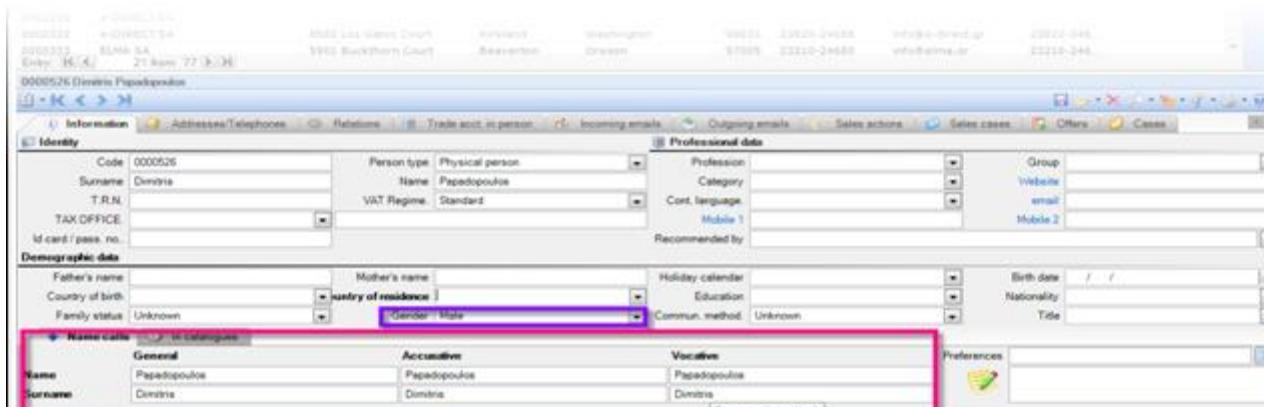
**Context Scroller – Person management:** Provides the functionality of person entries processing (physical and legal) as well as the full information in sales activities area and Service provision. We select Work Space\Person Management



Through the context scroller **Person management** for each selected entry, the following functionality is provided, through the related pages:

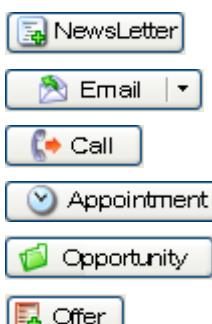
- ✓ General information of the selected person such as identity data and professional data
- ✓ Functionality of multiple addresses management
- ✓ Relations management with the functionality of actions execution
- ✓ Completed information to areas of: [Communication](#) (Incoming and Outcoming emails), [Sales Activities](#) (Sales actions, Sales and Offers cases) and [Customers Service](#) (Cases, Support calls, Complaints and Tasks)

When it concerns a physical person, is given the functionality of [automatic completion](#) of the name and full-name cases based on grammar rules. The completion mechanism of the calls sets by default the [gender](#) of the physical person.



In [Relations](#) page, the following automations are available (actions):

<a href="#">Relations</a>												
Code	Name	Relation type	Depart.	Position	From...	Up to d...	Email	Phone	Mobile	From addr...	In address	Inactive
0000002	ASPI'S BANK	Employee => manager	DEV	5/19/20...	5/22/20...							
0000007	BNP PARIBAS	Employee => manager	DEV									
0000004	CITIBANK	manager => Employee										



- ✓ Addition of the selected contact to the system list Newsletter relations
- ✓ Send e-mail to the selected contact with the use of template
- ✓ Call creation to the selected contact
- ✓ Maintenance task creation to the selected contact
- ✓ Creation of new sale opportunity to the selected contact
- ✓ Offer creation to the selected contact

# RESOURCES MANAGEMENT

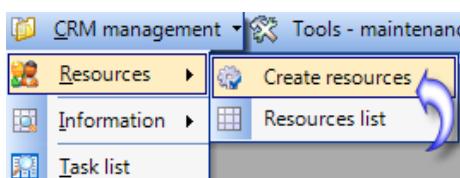
Resource is the basic media for tasks assignment and execution.

The following [resources types](#) defined by the system:

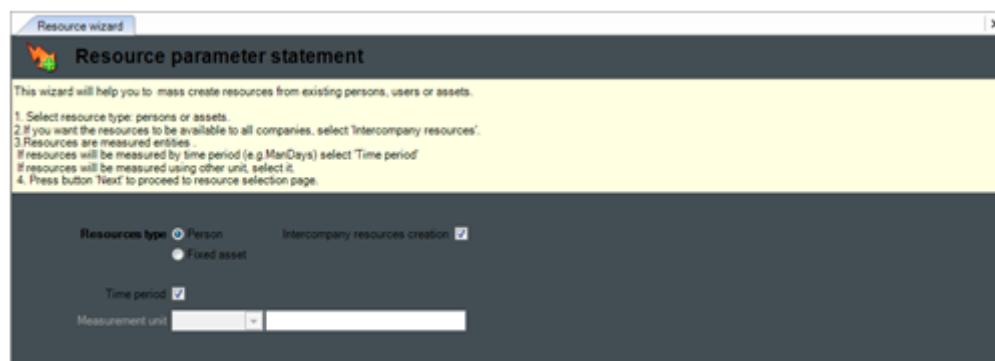
- ✓ Person
- ✓ Fixed Asset
- ✓ Resource group
- ✓ General resource

## How Do I CREATE RESOURCES

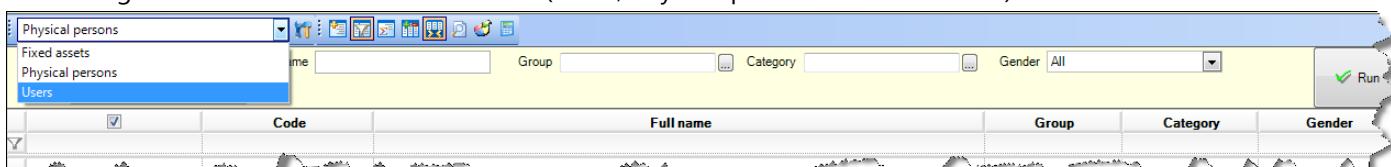
The Entersoft CRM offers a wizard for mass creation of resources of person or fixed asset type. The wizard is based on the use of a scroller of persons or users for resources of person type and to a scroller of fixed assets for resources of fixed asset type. From the [CRM Management\Resources](#) menu we select **Create resources**



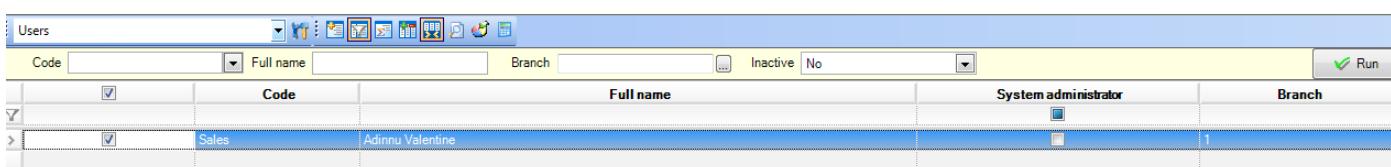
Continuing we select the resources type (person or fixed asset) that we want to create. We define whether the resources that are about to be created will be available to all system companies (inter-company) and we define whether the measurement unit will be time range (e.g. manpower) or another one.



Continuing we select one of the available lists (Users, Physical persons or Fixed Assets).



We select the entities (system users for instance) for which we want to create resources. **Caution: The users must have been previously connected to a physical person.**



We complete the process by selecting the Execution button.



## How Do I Manage Resources

As mentioned before, the resources may be of different type and this has immediate effect to the completion of some fields. The following examples show the differentiation of a resource depending on its type.

### ✓ Resource example of **person** type

This screenshot shows the 'Resource' screen for a 'Person' type resource named 'Dimitris Papadopoulos'. The 'Type' dropdown is set to 'Person'. The 'Code' field contains 'DPA'. The 'Description' field is 'Dimitris Papadopoulos'. The 'Alternative description' field is empty. The 'Email address' field is 'dpa@info.gr'. The 'Time period' checkbox is checked. The 'Resource role' dropdown is set to 'PRODUCT MANAGER, ADMINISTRATOR'. Other fields like 'Fixed asset' and 'Measurement unit' are present but empty.

### ✓ Resource example of **fixed asset** type

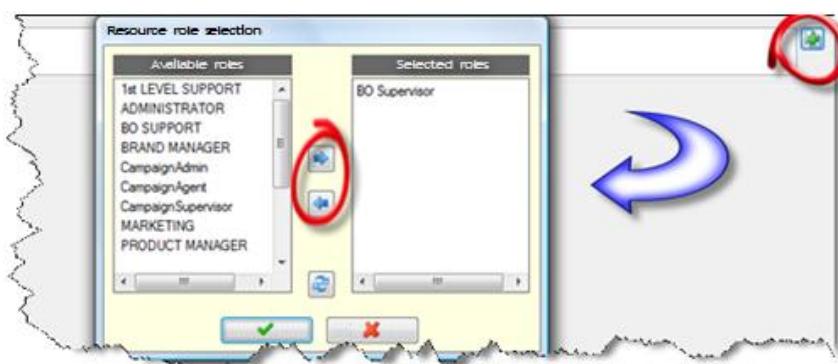
This screenshot shows the 'Resource' screen for a 'Fixed Asset' type resource named 'OFFICECHAIRS'. The 'Type' dropdown is set to 'Fixed asset'. The 'Code' field contains 'DR'. The 'Description' field is empty. The 'Alternative description' field is empty. The 'Email address' field is empty. The 'Time period' checkbox is unchecked. The 'Resource role' dropdown is empty. Other fields like 'Person' and 'Measurement unit' are present but empty.

### ✓ Resource example of **Resource group** type

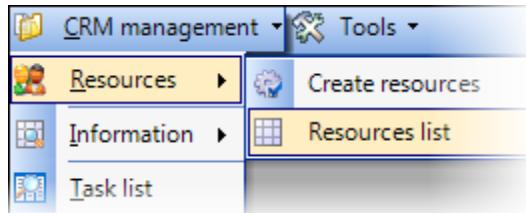
This screenshot shows the 'Resource' screen for a 'Resources group' type resource named 'Athebs Sales'. The 'Type' dropdown is set to 'Resources group'. The 'Code' field contains 'Athebs Sales'. The 'Description' field is 'Athebs Sales'. The 'Alternative description' field is empty. The 'Email address' field is empty. The 'Time period' checkbox is checked. The 'Resource role' dropdown is set to 'BRAND MANAGER'. Below the main form, there is a table titled 'Member resources group' showing members and their details:

Member	Description	Resource type	Team leader
00001	Salesperson 1	General resource	
Equipment	Equipment	Fixed asset	
Dimitris Papadopoulos	Dimitris Papadopoulos	Person	

A resource must have at least one role (e.g. Sales, Service etc) and is especially important since it is directly related to the assignment rules that are in force in a task type. As far as the selection of roles is concerned, we have the functionality to define for each resource entry, the selected roles, by selecting from the available roles list. A resource may contain more than one role.



From the CRM Management\Resources menu we select the **Resource list** which is the main management scroller of the particular entity.



This scroller appears the resources we have created, grouped by resource type.

Code	Name / Description	Email	MU	Intercompany	Inactive
kar	kar	kar@entersoft.gr	Time	<input checked="" type="checkbox"/>	<input type="checkbox"/>
resource1	admin		Time	<input checked="" type="checkbox"/>	<input type="checkbox"/>
resource2	esmaster		Time	<input checked="" type="checkbox"/>	<input type="checkbox"/>
sme	sme		Time	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>- Resource type: Resources group (numär:1)</b>					
<b>Sales team</b>					

### MASS ASSIGNMENT OF RESOURCE ROLES

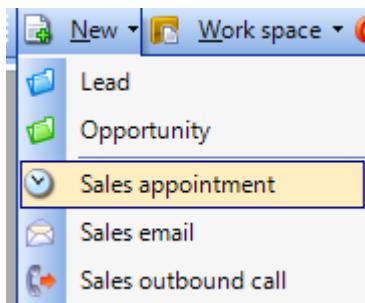
We can use the functionality of [roles mass assignment](#) to one or more resources, through the actions of the particular scroller.

Κωδικός ρόλου	Περιγραφή	Ενέργεια
Analyst		None
BRAND MANAGER		None
CampaignAdmin		None
CampaignAgent		None
<b>CampaignSupervisor</b>		Removal
Consultant		None
Customer support		None
Developer		None
<b>Management</b>		Add
MARKETING		None
PRODUCT MANAGER		None

# COMMUNICATIONS / TASKS MANAGEMENT

## How Do I ENTER A TASK

In order to enter a task, we select from Entersoft CRM menu [New](#) the task type that we want to create:



By selecting the [Sales Appointment](#) task-type, we must give values to the various fields presented to the different areas.

### Classification area

The 'Classification' dialog box contains the following fields:

- Type: SAP (dropdown menu showing SAP-00004)
- Subject: .
- Status: Open (dropdown menu showing Open)
- Related to: Sale (dropdown menu showing Sale)
- Outcome: (dropdown menu)
- Belongs to: OPP-00001 (dropdown menu)
- Campaign: (dropdown menu)
- Project: (dropdown menu)

<b>Subject</b>	A short description of the task (up to 100 characters).
<b>Status</b>	The current status of the task. Each status also defines a particular level of completion (e.g. if it is pending or if it is completed).
<b>Related to</b>	It defines qualitative, what a task is concerned. The available options can be altered. The field is available to particular task types.
<b>Outcome</b>	Describes the task result (task review) and is only available to particular task types.
<b>Belongs to</b>	A task may be autonomous or may be subtask of another task. The searching returns the tasks that are <u>allowed</u> to be parent tasks of the task that is entered. During task selection, the trade account data is automatically completed. The field also supports advanced search with Shift-F3.
<b>Campaign -</b>	Defines the Marketing Campaign to which the task refers. The response field defines the last
<b>Response</b>	response of the person for the selected campaign, when exists.

## Scheduling and Ownership area

 **Scheduling & ownership**

Owner	<input type="text"/>	<input type="button"/>	<input type="button"/>
Assigned to	<input type="text" value="kar"/>	<input type="button"/>	<input type="button"/>
Group	Sales team		
Location	<input type="text"/>	<input type="button"/>	
Due date	/ /	<input type="button"/>	All-day <input type="checkbox"/>
Planned start	6 / 26 / 2008	<input type="button"/>	14:16 <input type="button"/> 1 hour <input type="button"/>
Planned end	6 / 26 / 2008	<input type="button"/>	15:16 <input type="button"/>
Actual closed	/ /	<input type="button"/>	
Reminder	<input checked="" type="checkbox"/>	6 / 26 / 2009 <input type="button"/>	13:16 <input type="button"/> -364:23:0 <input type="button"/>

Owner	It is the resource responsible for the task life cycle.  
Assigned to	Possibility of sending e-mail to the task supervisor. The electronic address derives from the related resource, if exists, otherwise from the persons' electronic address.   
Group	It is the resource to which the task is assigned.  
Location	Possibility of sending e-mail to the task assignment resource  
Due date	It shows the journal of the tasks assigned to the selected assignment resource.
All-day	A task can be assigned to a group of resources.
Planned Start	Defines the place where a task may occur and it <u>only</u> appears if the task type is Appointment.
Planned end	The <u>ending</u> date that is demanded for the task to be completed. This date allows comparing the variations from the initial dates that were reported.
Duration	It defines if the task is an all-day event.
Actual closed	The planned starting date and time of the task. It is <u>automatically</u> completed with the current date and time.
Reminder	The planned end date and time of the task.
	The estimated duration of the task. In case a value is defined, the <u>Planned end</u> field is automatically selected.
	It defines the actual date and time of task completion. The field is automatically activated in the case where the selected status is Successfully completed, Failed or Cancelled.
	Defines the time and the hour that we wish the system to remind the task.

## Trade Account Details

Account details	
Company-person	Entersoft SA
Trade acct	1 Entersoft SA
Contact	0000088 kar
Address 1	
Contact details	

**Company - Person** We must select the person for which the task is taking place. The field supports advanced search with Shift-F3.

**Trade acct** The trade account connected to the person. In order to select trade account is not required the person to be completed as after the selection of the trade account, the person is suggested by default. The field supports advanced search with Shift-F3.

 Possibility to create a customer based on the person of the task. In case the trade account is completed, it will appear the form containing the data of the selected customer.

**Contact** We select the contact of the person. It is not required to have a person or trade account selected in order to select a contact.

 There is a functionality of a new physical person creation (contact) with creation of a relationship with the person of the task at the same time. In case a contact has been selected already, it is presented the form with the data of the selected contact.

 Functionality of sending e-mail to the selected contact. The email address derives from the relation between the person and the task contact. If there is not an electronic address in the relation entry, it is selected the one of the persons' email address.

**Address** The persons' address. For instance, into a sales appointment we select the persons' address where the appointment will take place as long as it occurs to the place of the trade account.

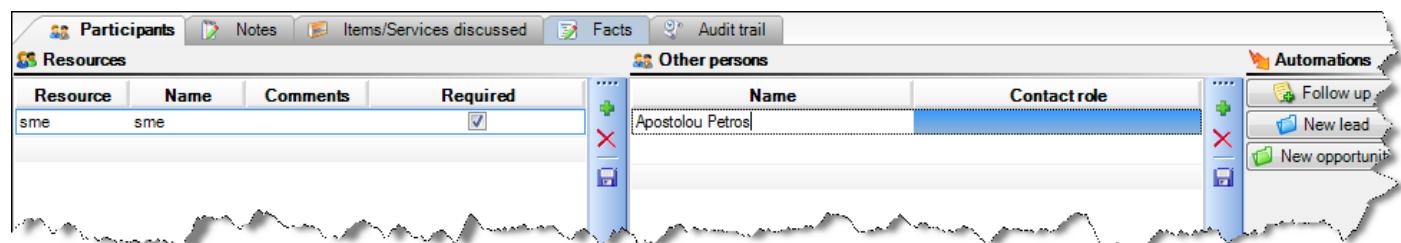
 It gives the possibility of the selected person's addresses handling, as well as of new addresses creation.

**Contact details** Defines contact details of the selected address, such as street, area, telephones, fax.

Other than the above basic fields, there are additional available fields to other task pages. For instance, to the *Sales Appointment* task form, the following pages are presented.

### Participants

A task may occupy other resources than the one to which is assigned. They are defined to the [Participants\Resources](#) page. In addition to the [Participants\Other](#) page, we select persons (physical or legal) with which the task is related. For instance, a Sales appointment could contain the list of external consultants that will take part to the decision of some investment.



The screenshot shows the Participants/Resources page. On the left, under 'Resources', there is a table with columns: Resource, Name, Comments, and Required. One row is shown: 'sme' and 'sme'. A checked checkbox is in the 'Required' column. On the right, under 'Other persons', there is a table with columns: Name and Contact role. One row is shown: 'Apostolou Petros'. A blue vertical toolbar is visible on the right side of the interface.

### Notes

We have the functionality to enter [Notes](#) for the task that can be really useful for the management of a task but also to type important comments to the [Communication](#) field. The content of this field does NOT go under alterations or is deleted.



### Items/Services discussed

Into a task may be entered more than one item that are related with this task. These may be stock items, services or even catalogue items.

Item/Service	MU	NO.	Outcome	Comments	Discussed	Description
device1	TEM	1			<input checked="" type="checkbox"/>	
Labor	TEM	2			<input type="checkbox"/>	Labor
Recurrent charges	TEM	3			<input checked="" type="checkbox"/>	Recurrent charges

### Facts

Into the facts page are entered the actual data of the task execution such as, the time spent from resources, any expenses occurred etc.

Resource	Type	Date	Time period	Expense type 1	Expense	Expense type	Expense	Units	Chargeable
resource2	Appointment	07/05/2010...	02:00:00		10.0000		0.0000	2.0000	No

### Audit trail

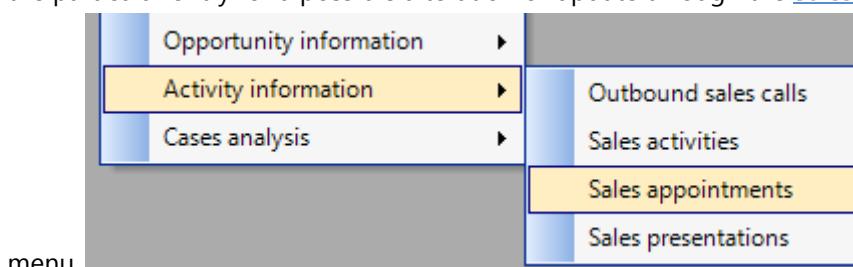
Through the Audit trail page we get information concerning data of the entry as well as regarding the alterations to some fields value such as the status, the estimated day of completion etc.

Audit trail					
Field	Field	Previous value	New value	Date	User
- Field Assigned to					
Assigned to	resource2	Sales team	5/14/2010	esmaster	
- Field Status					
Status	Lead	Offer creation	5/14/2010	esmaster	

Date	5/14/2010	12:17	Branch	1	KENTRIKA ΕΔΡΑΣ
Creation date	5/14/2010		Last modification date	5/14/2010	
Created by user	esmaster		Last modification user	esmaster	

With the completion of a task programming (eg. Sales Appointment) we are provided with the functionality to search the particular entry for a possible alteration or update through the [Sales\Activity Information\Sales Appointments](#)



The particular scroller illustrates the number of the appointments of sales department per Assignment resource.

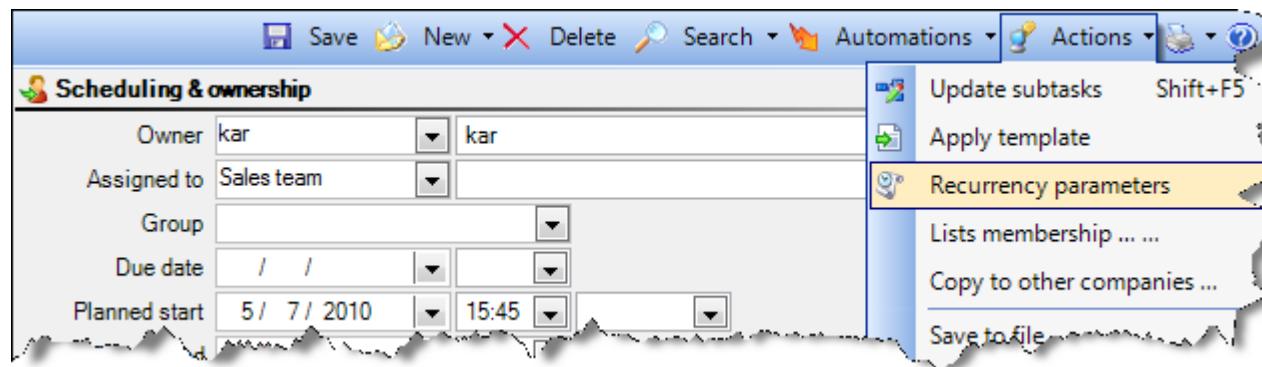
The screenshot shows a software application window titled "Sales appointments". The interface includes a toolbar with various icons for filtering, sorting, and reporting. Below the toolbar is a search bar with fields for "Date" (05/05/2007 - 07/05/2010), "Code", "Person name", "Business unit", and "Contains". There are also dropdown menus for "Regards customer" and "Code". A "Run" button is located in the top right corner. The main area displays a table of appointment records. The columns are labeled: Code, Planned start..., Hour, Status, Trade acct, Concerns, Related to, Contact, and Campaign. The data is grouped under two resource entries:

- resource2-esmaster [number:1]**:
  - SAP-00004    6/26/2008    02:16    Open    Entersoft SA    Sale    OPP-00001  
[ SUBJECT : ] .
- resource1-admin [number:3]**:
  - SAP-00003    10/30/2008    11:00    Open    Entersoft SA  
[ SUBJECT : ] test
  - SAP-00002    6/26/2009    12:00    Open
  - SAP-00001    6/26/2009    01:08    Open

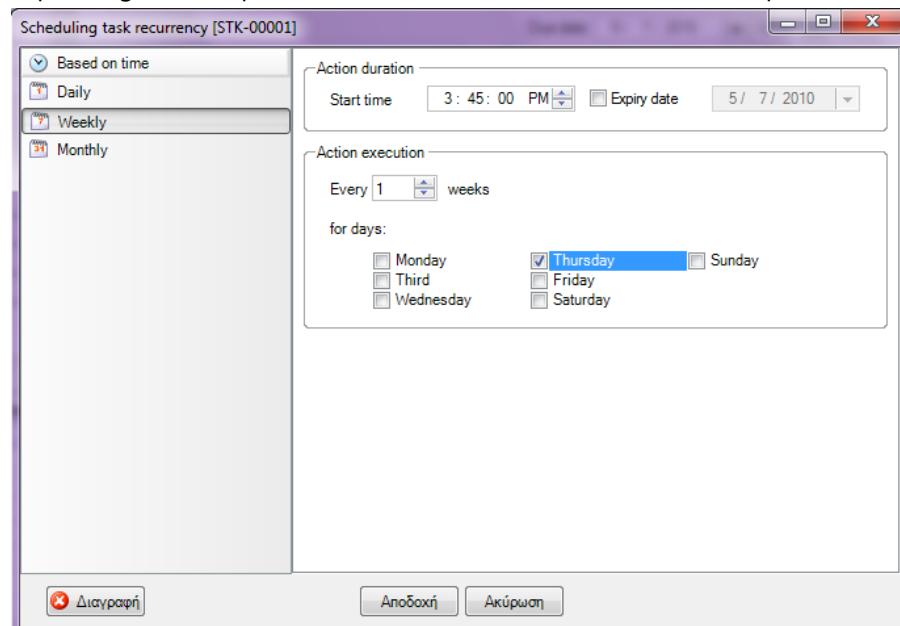
In the same way, we can get information concerning sales activities, Sales presentations, as well as for the outcoming calls.

## How Do I CREATE REPEATABLE TASKS

In order to define a repeatable task (e.g. a repeatable appointment) we must select [Recurrency parameters](#) from the actions of the related form and to define the repeatability range through the specially designed form that follows.



The start date of the repeatable tasks as well as the time and duration are defined from the source task form. Through the following dialog we are programming whether the execution of the task will be on a daily, weekly or monthly and depending on the option we define additional data for instance, per how many weeks or which days.



Continuing, during task save the repeatable tasks will be created following the repetition parameters in the way these have been defined.

	Code	Start	Subject
<b>- Class: Communication number:3</b>			
-	<b>Sales appointment number:3</b>		
-	SAP-00005	13/05/2010 17:58:00	funnel meeting
-	SAP-00006	20/05/2010 17:58:00	funnel meeting
-	SAP-00007	27/05/2010 17:58:00	funnel meeting
<b>- Class: Opportunity number:1</b>			
+	<b>Opportunity number:1</b>		
<b>- Class: Generic task number:1</b>			
-	<b>Sales Task number:1</b>		
-	STK-00001	07/05/2010 15:45:00	funnel meeting
<b>- Class: Campaign number:1</b>			
+	<b>Campaign number:1</b>		

## How Do I Manage Outlook Addin

To Entersoft CRM Outlook Addin provides the following:

- Filing of incoming emails to ES CRM**

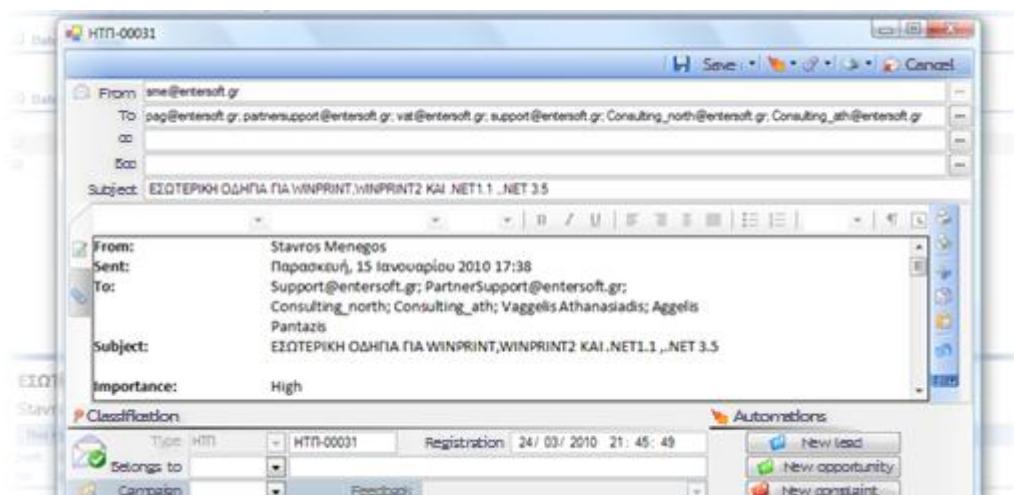
The filing process selects the person or the person and the contact for the task of e-mail type that will be created based on the electronic address of the sender. By selecting [Monitoring in CRM](#) for an e-mail, we achieve its filing to the Entersoft CRM, this is the automatic creation of a task of e-mail type.



After the completion of the above action, we notice that for the particular e-mail, we now have the [Projection in CRM](#) option and the **ES** indication appears. Through this indication, we take the information that an e-mail has been filed to Entersoft CRM.

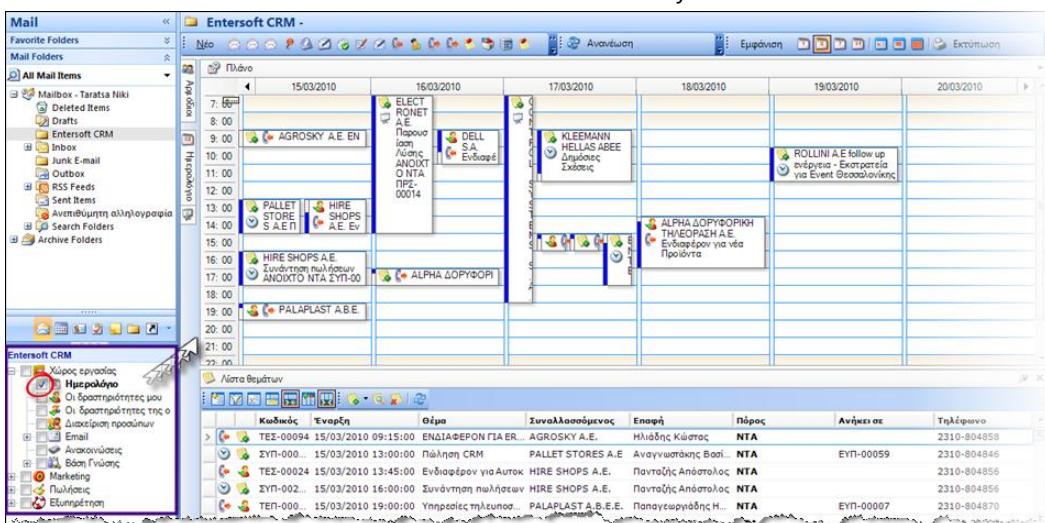


By selecting [Projection in CRM](#), the following screen appears. This screen illustrates the particular e-mail through the Entersoft CRM environment



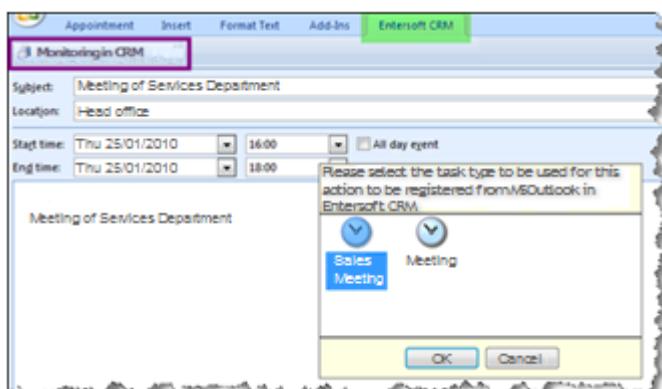
### Tasks management through the tree menu

Each scroller is saved to the memory, in order not to necessarily executed every time the user selects it. In this way the user decides which scrollers will remain to the memory.



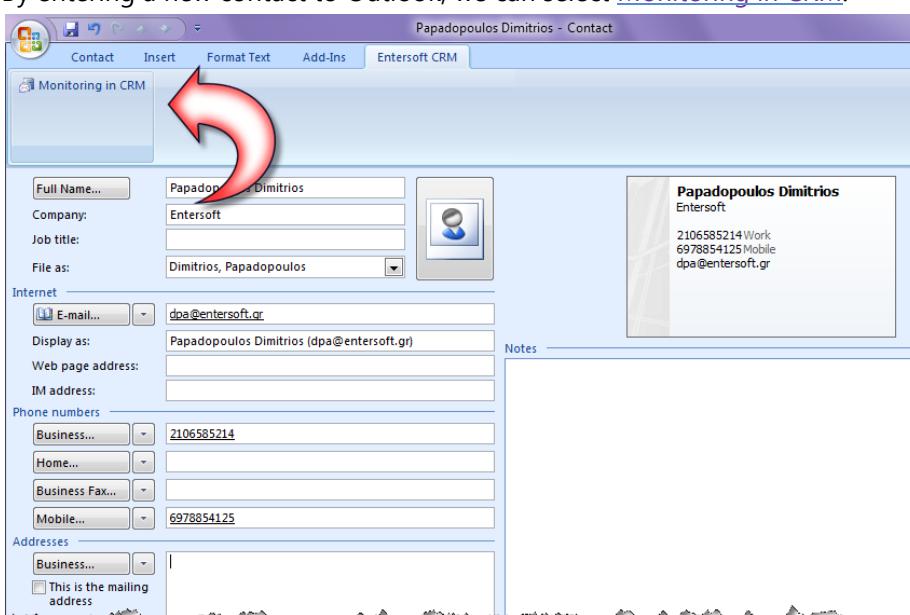
### Registration of appointment, tasks and contacts

By entering an appointment to the MSOutlook you are given the [Monitoring in CRM](#) functionality. We notice that we will need to select the task type that we want to be used in order the particular appointment to be registered from MSOutlook to ESCRM.



The same process is used for [tasks registration](#) of MSOutlook to ESCRM.

By entering a new contact to Outlook, we can select [Monitoring in CRM](#).



Continuing, with the [Projection in CRM](#) selection, we notice that for the entered contact to MSOutlook, has been created an entry of a physical person.

- Synchronization of appointments, tasks and contacts between ES CRM – MSOutLook

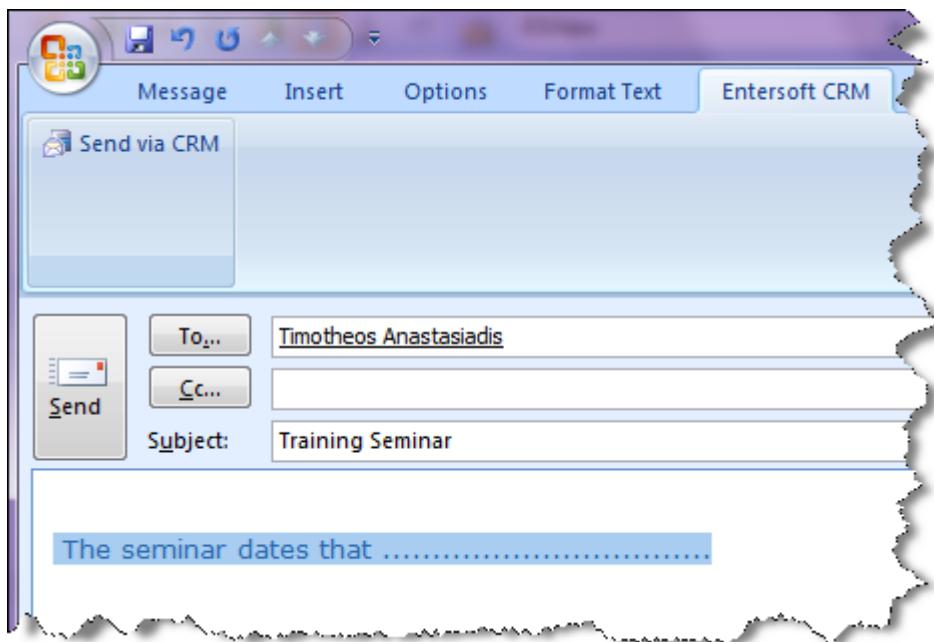
From MSOutlook Journal we can select **Synchronization from ESCRIM to MSOutlook**.

The screenshot shows the Microsoft Dynamics CRM 2011 interface with the title bar "Monitoring in ES.CRM" and "Synchronization ES.CRM/MS Outlook". The main area is a "Month" view for March 2010. The calendar grid shows days from Monday to Sunday. A tooltip "1 Map" is visible over the first cell. A tooltip "8 - 14 Map" is visible over the second row. A tooltip "15 - 21 Map" is visible over the third row. On the left, there's a sidebar with "All Calendar Items", "My Calendars" (with "Calendar" checked), "How to Share Calendars", "Open a Shared Calendar...", and "Mail". At the bottom, there are navigation buttons for "15 - 21 March" and a toolbar with icons for "New", "Edit", "Delete", "Save", "Print", and "Help".

From MSOutlook contacts we can select [Synchronization from ESCRM to MSOutlook](#). The indication in **ES** column gives us information as to the Outlook contacts that have been registered to ESCRM.

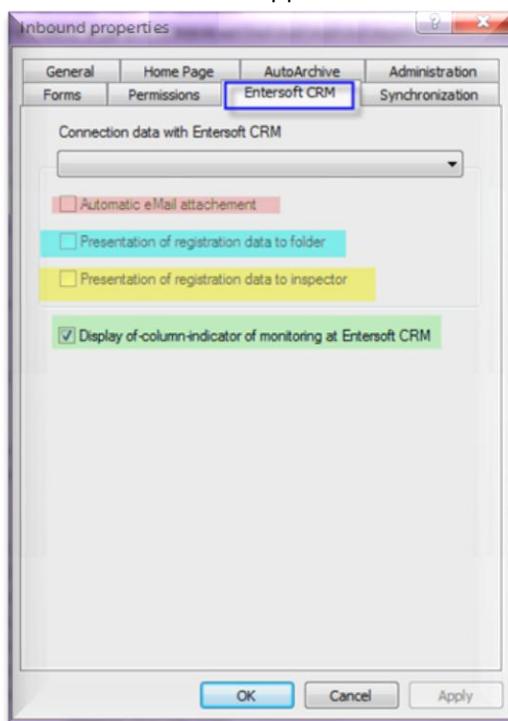
Contacts		Search Contacts						
	All Contact Items	Full Name	Company	File As	Business Phone	Business Fax	Home Phone	Mobile Phone
<a href="#">Click here to add a new ...</a>								
		Αναστοσίου Νικόλαος		Νικόλαος, Αναστοσίου				
		Κ. Βαζαράς Θεόδωρος		Θεόδωρος, Βαζαράς			6944-555666	
		ΠΕΛΑΤΗΣ ΙΩΑΝΝΗΣ		ΙΩΑΝΝΗΣ, ΠΕΛΑΤΗΣ				
		Κ. Γεωργαντζής Κώστας		Κώστας, Γεωργαντζής			6933-564852	
		ΤΡΑΠΕΖΑ ΑΙΓΑΙΝΑ		ΑΙΓΑΙΝΑ, ΤΡΑΠΕΖΑ				
		Κ. Δημητραΐδης Νίκος		Νίκος, Δημητραΐδης			6396-681082	
		ΤΡΑΠΕΖΑ EUROBANK		EUBANK, ΤΡΑΠΕΖΑ				
		κε Στεφανόπουλος Εφρήμη		Εφρήμη, Στεφανόπουλος			6944-897642	
		κ. Παπαγεωργίδης Ηλίας		Ηλίας, Παπαγεωργίδης			6955-321654	
		Αναστοσίδης Τιμόθεος		Τιμόθεος, Αναστοσίδης			6932-569023	
		ΤΡΑΠΕΖΑ ΕΦΕΝΗ		ΕΦΕΝΗ, ΤΡΑΠΕΖΑ				
		κ. Δεληγιάνης Κώστας		Κώστας, Δεληγιάνης			6368-855647	
		κο Γεωργαντζής Ανάστα		Ανάστα, Γεωργαντζής			6948-897624	
		ΕΛΛΗΝΙΚΟΣ ΤΥΠΟΣ		ΕΛΛΗΝΙΚΟΣ ΤΥΠΟΣ				

- Send e-mail & at the same time registration from MSOutlook by selecting [Send via CRM](#).



- Parametric management per separate folder**

We select properties to a particular Outlook folder (e.g. Inbox) where we can define whether e-mails automatic registration of the particular folder will occur, if registration data will be presented and finally whether the ES indication column will appear.

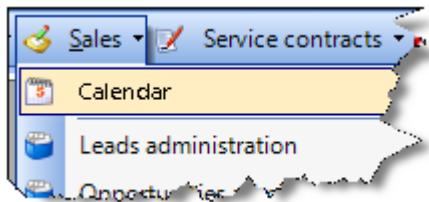


## CALENDAR MANAGEMENT

The [Tasks Calendars](#) provides tasks charts. Through the tasks calendars of Entersoft CRM we have the following options:

- ✓ New task entry
- ✓ Time modification of a task (start – end)
- ✓ Alteration of assigned resource of a task or participants
- ✓ Information as to the scheduled tasks to be executed in any period (day-week-month).

For instance, we select [Sales/Calendar](#) from Entersoft CRM



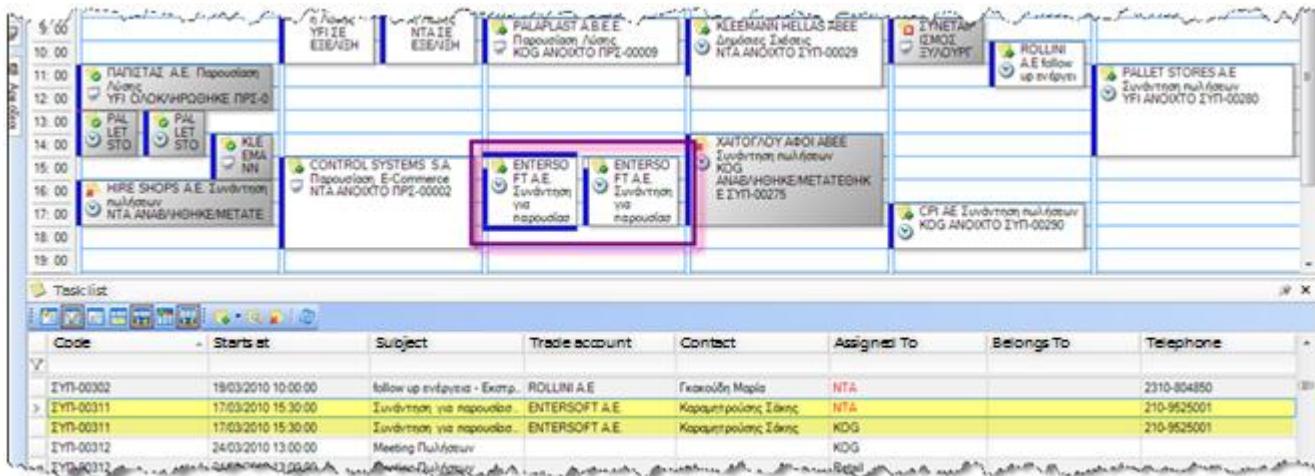
Each [Calendar](#) contains the **Plan** where tasks are illustrated to a chart depending on the option selected in **Show** parameter. The available options are daily, weekly, working week and monthly appearance. There are options for Print and Print preview, also.

Κωδικός	Έναρξη	Θέμα	Συναλλασσόμενος	Επαφή	Ανάθεση	Ανίκαντος	Τηλέφωνο
ΣΥΠ-00015	15/03/2010 13:00:00	Πώληση CRM	PALLET STORES A.E.	Αναγνωστάκης Βασι...	NTA	EYΠ-00059	2310-804846
ΠΡΣ-00038	15/03/2010 14:00:00	Παρουσία Λύσης	KLEEMANN HELLAS.	Γεωργίου Θεόδωρος	NSA		25210-24696
ΣΥΠ-00284	15/03/2010 16:00:00	Συνάντηση πωλήσεων	HIRE SHOPS A.E.	Παντζήδης Ανδριτόλος	NTA		2310-804856
ΠΡΣ-00014	15/03/2010 09:00:00	Παρουσία Λύσης	ELECTRONET A.E.	Δημητρίου Μιχαήλος	NTA		25210-24697

In the particular calendar (sales) to the left section of the journal, are presented [resources with the role](#) Sales. In the case where the resources belong to groups, then they appear in a tree format under theirs group.

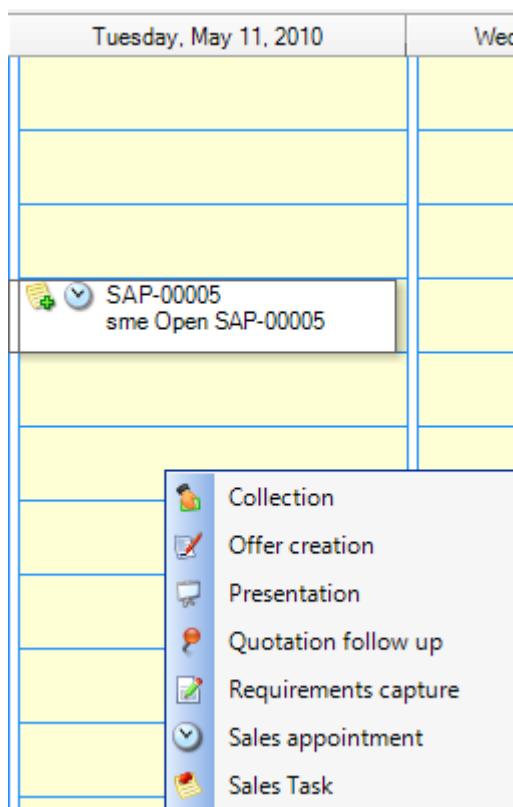
At the bottom part of the calendar is presented the tasks list. In this case, the **Synchronization** parameter is activated (appears in intense color), then for each selected task from the Tasks List it automatically occurs focus to the particular area (ημέρα-μήνας) of the calendar plan. The completed tasks are presented in grey background. .

In the case where a task eg. a sales appointment, has been assigned to a resource or to another participating resource, then the journal plan will appear twice and into two list rows. In this way the monitoring of resources occupation becomes easier.



## How Do I Manage A Task Through A Calendar

With right click, after we have selected the desired time range, we can create a new task by selecting the task type and continuously we enter the desired fields. In this way the Planned start and end date as well as the task duration, are automatically completed.



Another way is to select from the [New](#) area the task that we want to enter. The difference is that no programming field is automatically completed.



## How Do I Control Managers Availability

In the [Actors](#) area we select the resource that we desire which results to the presence of only the tasks that have been assigned to the particular resource or the tasks to which is simply participates, into journal plan. In this way we can easily control the availability of a resource for a particular time range.

Κωδικός	Έναρξη	Θέρμα	Συναλλασσόμενος	Επαρχία	Ανάθεση	Ανήκει σε	Τηλέφωνο
ΠΡΣ-00034	15/03/2010 11:00:00	Παρουσίαση Λύσης	ΠΑΠΙΣΤΑΣ Α.Ε.	Λιθαργία Χριστόδουλος	YFI		2310-897655
ΣΥΠ-00015	15/03/2010 13:00:00	Πάγια CRM	PALLET STORE Α.Ε.	Αναγνωστικός Κώδικας	NTA		2310-80446

If we select one or more resources then we can compare theirs availability with [drag and drop](#) to change ones task resource assignment from one to another or to alter someone from the participating resources.

Κωδικός	Έναρξη	Θέρμα	Συναλλασσόμενος	Επαρχία	Ανάθεση	Ανήκει σε
ΠΡΣ-00014	16/03/2010 00:00:00	Παρουσίαση Λύσης	ELECTRONET Α.Ε.	Διαμαντίδης Κυριάκος	NTA	
ΠΡΣ-00002	17/03/2010 00:00:00	Παρουσίαση E-Com...	CONTROL SYSTEM	Πέτρου Νίκος	NTA	

With the [Journal](#) selection we can easily get informed as to the dates where tasks have been programmed.

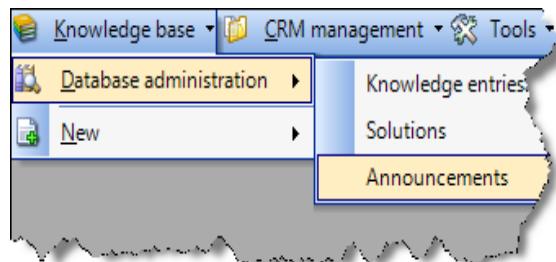
# KNOWLEDGE BASE MANAGEMENT

The Entersoft CRM provides the functionality of **COMPANY KNOWLEDGE BASE** management. The main contents are:

- ✓ Knowledge entries
- ✓ Solutions
- ✓ Announcements

## HOW DO I MANAGE COMPANY ANNOUNCEMENTS

From the menu [Knowledge Base\Database administration](#), we select **Announcements**.



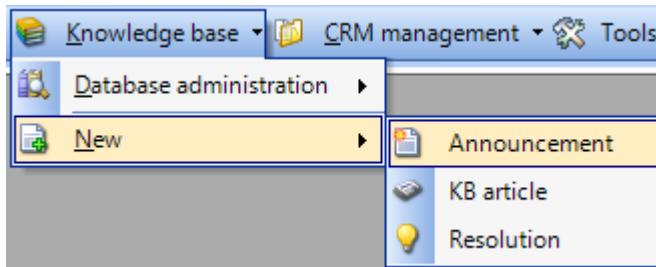
Through this option, the context scroller **Announcement management** appears and where we can then select the [Announcement](#) that we are interested in. We have the opportunity to get informed in relation to her content as well as to make some alterations if is desired.

The screenshot shows the 'Announcement management' screen. At the top, there is a toolbar with various icons for filtering, sorting, and actions. Below the toolbar is a search bar with fields for 'Item code', 'Category', 'Contains', and a 'Run' button. The main area displays a table of announcements:

Code	Subject	Status	Category	Display until
ANS-00001	Entersoft Romanian Software	Published	Marketing	
ANS-00002	Alternative Market	Published	Marketing	

At the bottom left, there is a pagination indicator 'Entry: 1 from 2'. Below the table, a specific announcement is selected: 'Announcement: ANS-00001 (Published)'. This selection is highlighted with a blue border. The detailed view includes fields for 'Classification' (Type: ANS, Owner: kar, Status: Published, Subject: Entersoft Romanian Software), an 'Audit trail' section (Creation date: 5/17/2010, Last modification date: / /, Created by user: esmaster, Last modification user: /), and a rich text editor containing the announcement content: 'By continuing the growing development of Entersoft we have proceeded to the establishment of Entersoft Romanian Software SRL.....'.

In the case, we desire to enter a [new](#) announcement then from the [Knowledge Base\New](#) menu we select **Announcement**.

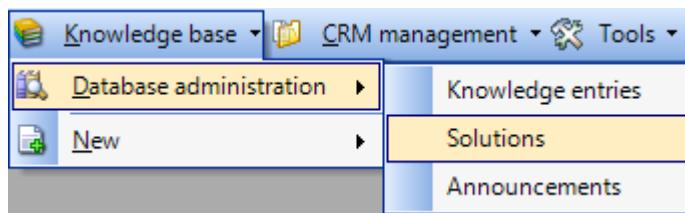


Continuing we complete the fields of the following form by defining for instance, the announcement category, the subject, the date up to which will continuous to appear as well as the announcement content.

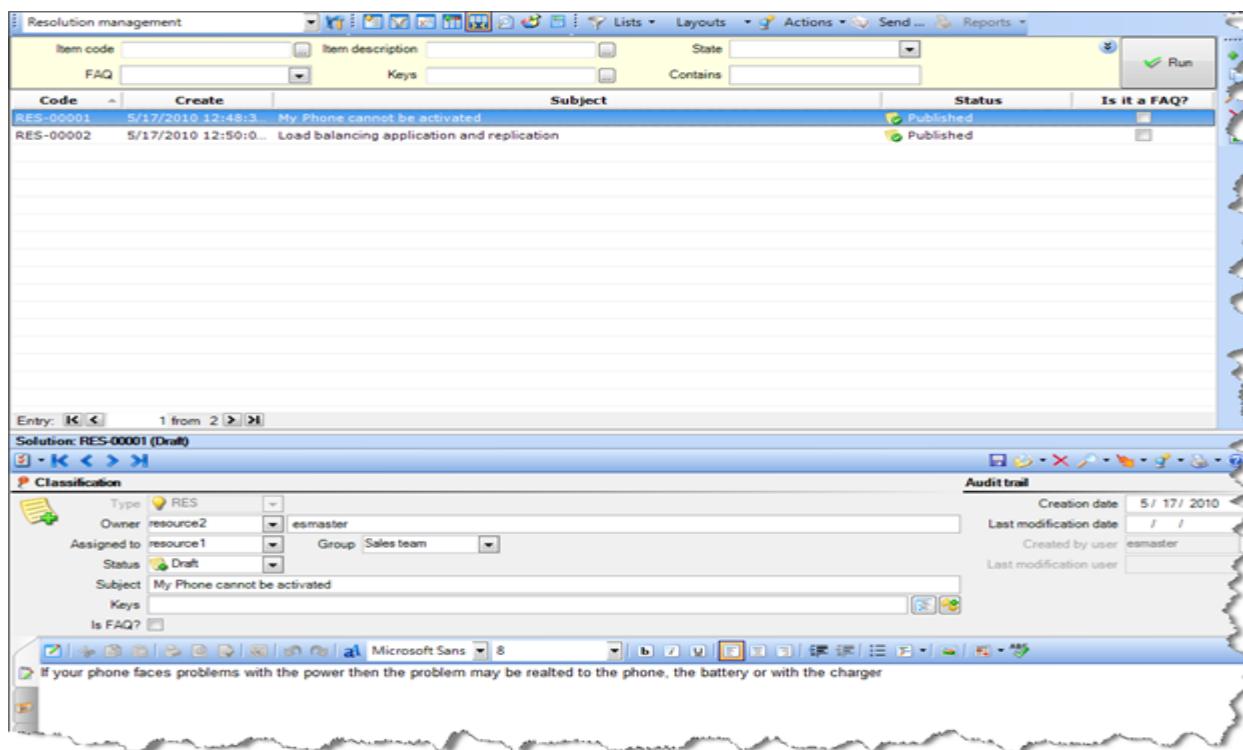
A screenshot of the 'Announcement' form in the CRM management software. The form includes fields for classification (Type: ANS, Owner: resource2, Assigned to: resource2, Group, Status: Published, Category: Sales, Subject: Alternative market), appearance settings (Appears until: 3 / 4 / 2011), and audit trail information (Creation date: 5 / 14 / 2010, Last modification date: / /, Created by user: esmaster, Last modification user). The content area contains the text: "Entersoft joined the Athens Alternative market in 03/06/2008.....".

## How Do I MANAGE SOLUTIONS

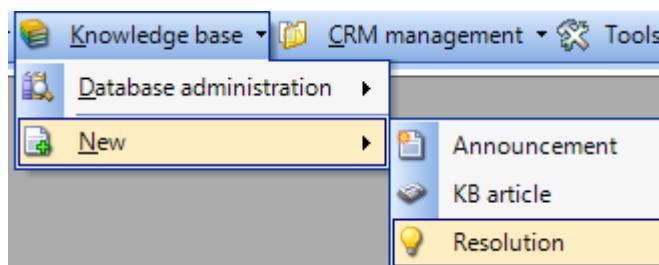
From the [Knowledge Base\Database administration](#) menu we select **Solutions**



Through this option, the context scroller [Resolution management](#) appears through which we select the [Resolution](#) that we are looking for. We have the opportunity to be informed in relation to the resolution status (draft, published), the items that the resolution is concerned as well as the content. From the criterions area we restrict our searching by selecting particular **words-keys**.



In the case we wish to enter a new resolution we select [Resolution](#) through the [Knowledge Base\New](#) menu.



Continuing we select fields of the following form by defining for instance, which is the subject of the resolution, if it is characterized as FAQ (Frequently Asked Question) as well as and multiple words keys that help to the searching process.

To the [Items](#) page, we insert the items that concern the particular resolution. This enables for instance, the immediate response to a problem from the customers' service department when a customer reports a problem concerning an item and the service agent has an available resolution to recommend to the customer about this item.

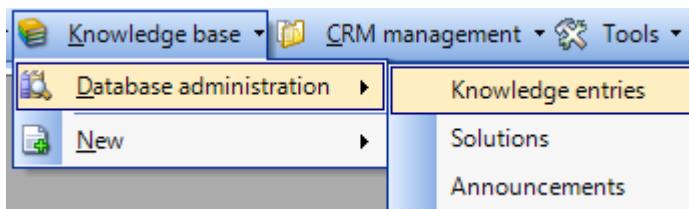
Also to the [attachments](#) page, we are provided with the functionality to attach an important documentation for the

particular resolution.

The screenshot shows a software interface for 'Resolution management'. At the top, there's a search bar with fields for 'Item code', 'Item description', 'State', and 'FAQ' (with dropdowns for 'Create', 'Keys', and 'Contains'). A 'Run' button is also present. Below the search bar is a table with columns: 'Code', 'Create', 'Subject', 'Status', and 'Is it a FAQ?'. Two rows are listed: RES-00001 (Subject: 'My Phone cannot be activated', Status: Published) and RES-00002 (Subject: 'Load balancing application and replication', Status: Published). An 'Audit trail' section on the right shows creation and modification details. The main area displays a 'Classification' form for item RES-00001, which includes fields for Type (RES), Owner (resource2), Assigned to (resource1), Group (Sales team), Status (Published), Subject (My Phone cannot be activated), Keys (battery), and Is FAQ? (unchecked). A red circle highlights a small icon in the classification form's toolbar. Below the classification form is a table with columns: NO, Item, and Description. One row is shown: NO 1, Item device1, Description Nokia N96. This row is also highlighted with a red border.

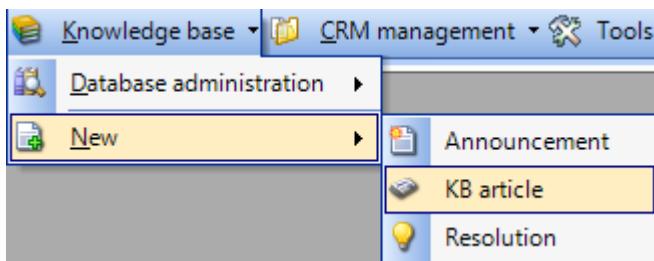
## How Do I Manage The Knowledge Base Articles

From the [Knowledge base\Database administration](#) menu we select **Knowledge Entries**.



Through this option will appear the context scroller named **Articles Management**.

If we want to enter a new announcement, we select from [Knowledge Base\New](#) menu the **KB Article** option.



Continuing we complete the fields of the following form by defining for instance, the subject of the article, the category as well as multiple words keys that will help to searching.

The screenshot shows a detailed configuration screen for a knowledge base article. On the left, there's a 'Classification' section with fields like Type (KB), Owner (0206503, NOVACON), Author (0206503, NOVACON), State (DRAFT), Title (Demo Database), Available To (PARTN, USR, EXEC), and Keywords (E-COMMERCE). On the right, there's a 'Record Info' section with fields for Creation date (17/05/2010), Last modification date, Created by user (mpa), Last modification user, Last Review Date (17/05/2010), Review (months) (6.0000), and Next Review Date (17/11/2010). At the bottom, there's a rich text editor with a toolbar and a preview area containing the text 'Demo Database E-commerce'.

## SALES MANAGEMENT

The Entersoft CRM fully covers all the spectrum of actions that are executed by the representatives of a sales department. These tasks are either executed as autonomous tasks or concern a sales case such as the **Sales Opportunity** or such as a **Lead**. These activities are standard. Each task type has special qualitative characteristics related with the entry form as well as with the behavior of the available fields. The available types are the following:

- ✓ Sales calls
- ✓ Sales appointment
- ✓ Sales E-Mail
- ✓ FAX
- ✓ Presentations
- ✓ requirements collection
- ✓ Quote creation
- ✓ Receipt

The total management of a sales department is covered from the following:

- **Recording of business tasks:** The tasks are recording important information such as the person or customer, the hours that the task will take place, what is concerned, the sales executive that is responsible for the task as well as other information such as the products or services, the attachments eg. marketing documentation, sales offers.
- **Sales tasks calendar:** The number of the sales representatives tasks is automatically presented through charts in a tasks calendar.
- **Sales tasks results:** The reason for which a task occurs, her status as well as her results can be recorded and analysed. The Entersoft CRM contains a number of lists – reports that provide information for the total of the tasks that are executed from sales representatives.

### How Do I MANAGE A LEAD?

As a lead, I defined the **NOT certified sale information**. One lead concerns an existing customer or a potential customer. Traditionally, one lead is a result of a marketing campaign but it can also be directly inserted from a sales representative after information obtained through a communication. This communication may be an appointment, a Phone call, an email or a fax.

One lead is assessed from the sales representative that is being managed aiming its **conversion** to sales opportunity (lead conversion).

The screenshot shows the Entersoft CRM interface for managing leads. The main window is divided into several sections:

- Classification:** Contains fields for Type (set to LEAD), Subject (Phone invitation), Status (New lead), Priority (A), and Campaign.
- Account details:** Shows Company - person (Retail customer), Trade acct (Cust-001), Contact (empty), Address (1), and Contact details.
- Lead evaluation:** Shows Lead source (Market research), Suggested by (empty), Business unit (empty), and Timeframe (1-3 Months). It also includes Lead quality (1-High) and Activity fields.
- Scheduling & ownership:** Shows Owner (empty), Assigned to (empty), Group (empty), Due date (empty), Planned start (10/7/2008), closed (empty), and Reminder (empty).
- Notes:** A large text area for notes, currently empty.
- Subtasks:** A list of subtasks, with the first one being "Microsoft Sans" and the second being "8".
- Facts:** A list of facts, with the first one being "Microsoft Sans" and the second being "8".
- Audit trail:** A list of audit trail entries.
- Communication:** A section for managing communications, currently empty.

Some basic fields of a Lead are the following:

Lead source	Indicates the source of a lead (eg. campaign, internet, personal contact eg.)
Lead quality	Indicates the lead quantity based on sales executive evaluation that the lead manages.
Suggested by	Indicates the person that introduced the lead. This field provides the searching functionality to the persons and supports advanced search with Shift-F3.
Campaign	Indicates the marketing campaign from which the lead originated.
Response	Indicates the last response of the person or contact for the selected campaign.
Business Unit	Defines the business unit where the trade account of the lead belongs and is automatically updated from trade account business unit.
Activity	Indicates the activity of the trade account of the lead and is automatically completed from the trade account activity.
Time plan	Indicates the estimated time range based on which the interested party will express real interest for the sale.

To the header of the form there is an available action for the [conversion of a lead to sales opportunity](#). This action allows **only one** sales opportunity to be produced from a lead. The conversion presuppose the lead [assessment](#) from a sales executive. The fields concerning Lead assessment:

- Lead source
- Lead quantity

From [Sales\Lead information](#) menu we select **Lead evaluation**, a scroller where the Leads Sources with the number of Leads per source are displayed. For each Lead Source we can view the Leads grouped by Quantity.

When the [Assessment](#) process for a lead is completed, we are provided with the functionality to execute the [=> Opportunity](#) action. This will result to the Lead conversion into a **Sales Opportunity**. We notice that after the completion of this action the lead [Status](#) turned to [convert to opportunity](#) and the created sales opportunity now appears as Lead **sub-task**

Type	Code	Subject	Status	Priority	Concerns	Assigned...	Start	Due date
OPP	OPP-0003	LEAD-00001	Lead	A				14/05/2010 14:18

One Lead is usually originates from a marketing action but it can also be created directly from a sales representative from an information obtained through a phone communication (sales phone call, sales e-mail). In this case and as we notice to the following picture, we have the functionality to execute the [New Lead](#) action through the screen of the corresponding communication.

Classification

Scheduling & ownership

Participants

Resources

Other persons

Automations

After the completion of the action we notice that in leads' sub-tasks, the task has been automatically completed (eg. Sales appointment) from which has originated and the Status has turned into Completed.

Lead management

Subtasks

Classification

From the Sales menu and through the context scroller Lead Management we are provided with the functionality to manage the leads and to easily identify the new leads through the indication

Lead management

Classification

Evaluation

Scheduling & ownership

For sales analysis, an important scroller is the Lead progress stage where is analyzed the exploitation degree of the Leads regarding the resources to which have been assigned. The leads of each resource are separated into open, in progress, successful (transferred to opportunities), failed and cancelled. Is examined the Leads conversion rhythm to Sales opportunities, in order any excessive loss of potential opportunities to be detected. .

For each assigned resource, the Leads will be analytically displayed and are grouped per status.

For each Lead, are analytically displayed its sub-tasks, grouped by Status and per each opportunity that is connected to a Lead are displayed her sub-tasks (e.g. Appointments, presentations, Calls) as well as any Offers, Orders and Invoices that produced.

Assigned to	Name	Open	In progress	=> Opportunities	Losses	Cancelled	Total leads
resource2	esmaster	1		0 %			1

Leads by status	Code	Start	Subject	Trade acct	Contact	Campaign	Lead source	Quality
- 1 New lead number:1								
LEAD-00002	5/17/2010	Meeting for presentation of n...						

Another important scroller is the Lead conversion rate where the Leads conversion into Opportunities, Offers, Orders and Invoices, per assigned resource, is illustrated.

It is accomplished a comparison of Leads number with the next levels, quantitative and in percentage.

Finally, the estimated revenues (defined in opportunity) are compared with the actual sales revenues, which consists of the Back orders value and the Invoices Net Value. The achievement rate compares the estimated sales with the actual.

Assigned to	Leads	Opportunities	Convert	Quotes	Convert	Number of wins	Convert	Exp. opportunity revenue	Sales	Achievement
Not assigned-	1	1	100 %			0 %				0 %
resource2-esmaster	2	1	50 %			0 %				0 %

Leads by status	Code	Start	Subject	Trade acct	Contact	Campaign	Lead source	Quality
- 1 New lead number:1								
LEAD-00002	5/17/2010	Meeting for presentation of ne...						
4 Converted number:1								
LEAD-00003	5/17/2010	Meeting for presentation of ne... Retail customer						

Lead subtasks	Code	Start	Subject	Status	Assigned to
OPP-00004	5/17/2010	LEAD-00003	Lead	resource2	

## How Do I Manage A Sales Opportunity

As a sales opportunity is defined the products and services [certified sales information](#). A sales opportunity may concern an existing customer or a potential customer. It can be autonomous created or after a certified lead conversion.

The sub-tasks, in the context of, a sales opportunity completion, could be appointments, calls, emails as well as of other type. The total picture of a sales opportunity is directly visible through the sales opportunity form as well as from the hierarchical lists that are provided from Entersoft CRM in the sales activity area.

The screenshot shows the Entersoft CRM Sales Opportunity form. The top navigation bar includes Save, New, Delete, Search, Automations, Actions, and various tabs like Informations, Notes, Contacts, Sales group, Stock availability, Communication, Sale methodology, and Attachments. The main form is divided into several sections:

- Classification:** Contains fields for Type (OPP), Subject (New CRM products), Sales stage (Presentation), Category (Existing customer), Campaign, Origin (Call inbound), Priority (A), Response, and Belongs to.
- Evaluation:** Contains fields for Lead source (Campaign), Suggested by, Business unit, Importance, Revenue, Sales factors, Lead quality (1-High), Activity, Win/loss reason, Certainty, and Contact details.
- Scheduling & ownership:** Contains fields for Owner (sme), Assigned to, Group, Due date (8/21/2010), Start (6/26/2008), Planned end, Actual closed, Reminder, and a Calendar button.
- Items:** A grid showing items with columns: NO., Item, Description, Catalogue item, Description, Quantity, MU, Net value. Rows include "1 device1" and "2 Import expo... Import export tools".
- Automations:** A sidebar with a "Quote" button highlighted with a blue box.

Some of the basic fields included to Sales opportunity form are:

Category	Grouping element where some default values are New customer, Existing customer, New partner, Existing partner.
Revenues	Defines the estimated revenues that are expected from the sales representative from the sales opportunity.
Certainty (%)	Defines the certainty (in percentage) of the sales representative that manages the opportunity in relation to the sales possibilities
Win/loss reason	Defines the basic reason of sales opportunity win or loss.
Importance	Indicates the importance of the sales opportunity for our company.

An opportunity may be connected with one or more [sales factors](#). Sales factors are important to be known in the initial phases of the opportunity. In this way we can export conclusions which are helpful to the right actions management that we are doing, for the opportunity successful completion.

A screenshot of a search or input field labeled "Sales factors" containing the text "Customer care, Framework, Quality of service".

An opportunity can be related to [stock items](#), [catalogue items](#) as well as [services](#) which are of the potential customer interest.

The screenshot shows the 'Items' page in the EnterSoft CRM application. At the top, there is a navigation bar with tabs: Items, Subtasks, Facts, Competitors, Quotes, Orders, Sales. Below the navigation bar is a table with columns: NO., Item, Description, Catalogue item, Description, Quantity, MU, Net value. Two items are listed: '1 device1' and '2 Import expo... Import export tools'. On the right side of the screen, there is a vertical sidebar titled 'Automations' which contains a 'Quote' option, which is highlighted with a blue border.

In the **Items** page we are given the functionality to create a sales offer related to our opportunity. By executing the action, we create the sales offer. The following opportunity data are transferred to the offer form:

- Customer
- Person
- Contact
- Opportunity items
- Sales opportunity

After entering the quote is created a task **Follow up on quotation** where is referred the code of the quotation where follow up must follow. The sales manager can undertake task time scheduling through the related calendar.

The screenshot shows the 'Follow up on quotation' window. At the top, there is a toolbar with Save, New, Delete, Search, Automations, Actions, and Help buttons. The main area is divided into several sections: 'Classification' (Type: FLO, Subject: LEAD-00001, Status: Open, Quote: ПРФ-1-00003, Concerns: OPP-00003), 'Scheduling & ownership' (Owner: resource2, Assigned to: resource2, Group: [dropdown], Due date: / /, Planned start: 5/17/2010 14:08, Planned end: / /, Actual closed: / /, Reminder: / /), 'Account details' (Company-person: Retail customer, Account: Cust-001, Contact: [dropdown], Address: 1, Contact details: ..), and 'Audit trail' (button). A red circle highlights the 'Actions' button in the toolbar.

To the Quotes, Orders and Sales pages are presented the related documents that are connected with the Opportunity.

The screenshot shows the 'Quotes' page in the CRM application. At the top, there is a navigation bar with tabs: Items, Subtasks, Facts, Competitors, Quotes, Orders, Sales. Below the navigation bar is a table with columns: Date, Document, Title, Trade acct, Value, VAT, Total, Transferr... The first row shows a quote dated 5/17/2010 with document number ПРФ-1-00003, title 'Продажа ср. п/з', trade account 'Cust-001 - Retail customer', value 1,500.00, VAT 285.00, total 1,785.00, and status 'not at all'.

An opportunity may be related with [one or more competitors](#). A sales representative must be aware of his competitors within an opportunity as well as theirs advantages and disadvantages. The management of an opportunity competitors is hierarchical. We can record [one or more advantages-disadvantages](#) per competitor. The following table presents the available entering fields.

Name	Threat	Comments	Prime competitor	Winner
BNP PARIBAS	2-Medium		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Karazanos Pavlos			<input type="checkbox"/>	<input type="checkbox"/>
TIM ΕΛΛΑΣ Α.Ε.Β.Ε	3-Low		<input type="checkbox"/>	<input type="checkbox"/>

The fields concerning competition are the following:

Name	Defines the competitors' name. The searching concerns the persons that are included to the system.
Threat	Defines the treat from each competitor (e.g. low, high)
Prime Competitor	Only one competitor can be identified as prime competitor for an opportunity.
Winner	In the case where an opportunity is lost, we are given the functionality to characterize a competitor as a winner of the opportunity.
Comments	We complete comments.

For the opportunities analysis per competitor, we can see the [Competition Analysis](#) scroller, where the opportunities and theirs expected revenues are analyzed.

Opportunities are separated into: Open, In progress, wins, Losses and Cancelled.

For each competitor, are analytically presented the Opportunities where is involved, grouped by Status. For the opportunities that are lost from a competitor the Lost Revenues are presented into a separate column. (These that we had evaluated as expected revenues). An opportunity can possibly appear many times if there are many Competitors involved.

Competitor	Open	In progress	Wins	Losses	Cancelled	Total opportunities	Lost revenues
TIM ΕΛΛΑΣ Α.Ε.Β.Ε						0	
Karazanos Pavlos						0	
BNP PARIBAS				1		1	

Opportunities per state

Code	Start	Subject	Trade acct	Assignee	Priority	Exp. expiry	Campaign	Exp.rev...
7 Lost [ Number: 1 estimated revenue: 0 ]	OPP-00003	5/14/2010	LEAD-00001	Retail customer	A			

Through the sale methodology, we are provided with the functionality to define one or more questionnaires that the sales manager will need to answer in order to enable for a complete "picture" for the topics that concern the particular sale.

AA	Property	Price
<b>Category Ερωτηματολόγιο</b>		
1	Are the requirements and the desirable results known an...	No
2	Does the default solution cover all the requirements?	No
3	Does it consist high priority for the customer?	No
4	4. The default value adds value to the customer?	No

From Sales menu through the [Opportunity management](#) scroller, we are provided with the functionality to manage Sales opportunities as well as to distinguish the [new Opportunities](#) through the indication.

Opportunity management

Code	Start	Subject	Status	Trade acct	Exp.revenue	Assigned to
OPP-00002	5/14/2010	EWQEASsAsAs; 'M,	Offer creation			Sales team-
OPP-00004	5/17/2010	LEAD-00003	Lead	Retail customer		resource2-esmaster

Entry: 2 from 2

**Opportunity: OPP-00004 (Lead)**

**Informations**

**Classification**

Type	OPP	OPP-00004
Subject	LEAD-00003	
Sales stage	Lead	Origin: Call inbound
Category	New customer	Priority:
Campaign		Response

**Evaluation**

Lead source	On road adv.	Lead quality	1-High
Suggested by			
Business unit		Activity	
Importance	Sales desired	Win/loss reason	Customer care
Revenue		Certainty	
Sales factors			

**Account details**

Company - person	Retail customer	
Trade acct	Cust-001	Retail customer
Contact		
Address	1	

**Contact details.**

**Scheduling & ownership**

Owner	resource2	esmaster
Assigned to	resource2	esmaster
Group		
Due date	5 / 28 / 2010	Start 5 / 17 / 2010
Planned end	5 / 31 / 2010	End closed / /
Reminder	1 / 1 / 1900	18:15 40312:19:1

An important scroller for sales analysis is the [Opportunities conversion rate](#). In this scroller is analyzed the Opportunities conversion to Offers, Orders and Invoices per assigned resource. It is achieved comparison of the number of the opportunities with the next stages, qualitative and quantitative. Finally, are compared the expected revenues that were defined to the opportunity with the actual sales revenue which consist from Back orders value and the Invoices Net Value. και την καθαρή αξία Τιμολογίων. The achievement % compares the expected sales with the actual.

Opportunity conversion rate

Assigned to	Name	opp count	offers count	opportunities to quotes	number of wins	Opportunities to quotes	Exp.opportunity revenue	Sales	Achievement																																
Not assigned		2	1	50 %	1	50 %	0.00	1,500	100 %																																
<b>Opportunities per state</b>																																									
<table border="1"> <tr><th>Code</th><th>Start</th><th>Trade acct</th><th>Subject</th><th>Priority</th><th>Exp. expiry</th><th>Campaign</th><th>Exp. revenue</th></tr> <tr><td>3 Presentation [ Number: 1 ]</td><td>estimated revenue: 0 ]</td><td></td><td></td><td></td><td></td><td></td><td></td></tr> <tr><td>OPP-00001</td><td>6/26/2008</td><td>Entersoft SA</td><td>New CRM products</td><td>A</td><td></td><td></td><td></td></tr> <tr><td>+ 7 Lost [ Number: 1 ]</td><td>estimated revenue: 0 ]</td><td></td><td></td><td></td><td></td><td></td><td></td></tr> </table>										Code	Start	Trade acct	Subject	Priority	Exp. expiry	Campaign	Exp. revenue	3 Presentation [ Number: 1 ]	estimated revenue: 0 ]							OPP-00001	6/26/2008	Entersoft SA	New CRM products	A				+ 7 Lost [ Number: 1 ]	estimated revenue: 0 ]						
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The [Opportunity certainty analysis](#) scroller presents the sales opportunities and theirs predicted revenues concerning the possibility degree per assigned resource. Are presented the open opportunities, in progress opportunities which are divided into 4 categories depending on the possibility percentage that has been given with limits 25%, 50%, 75% and 100%. The successful Opportunities are these that ended up to Orders or invoices and the failures these that ended up to a competitor or were not occur due to lack of interest. For each assigned resource we are provide with the functionality to analytically present his opportunities, grouped by status.

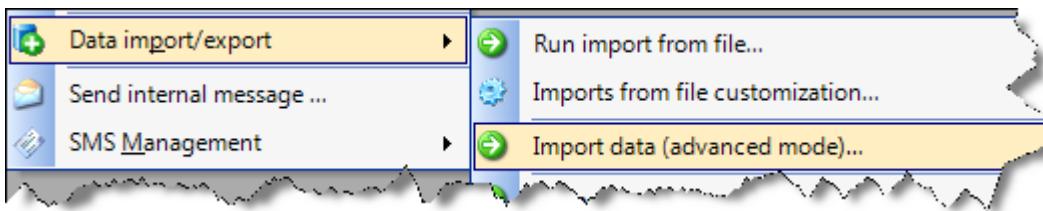
The screenshot shows a software interface titled "Opportunity certainty analysis". The top bar includes standard menu items like Start date, Planned end, Assigned to, Business unit, Activity, Marketing activity, and a prominent "Run" button. Below this is a detailed grid report.

Resource	Open		0-25%		25-50 %		50-75 %		75-100 %		Wins		Failures		
	#	Exp.reven...	#	exp.revenue	#	exp.reven...	#	exp.reven...	#	exp.reven...	#	Exp.reven...	sales	#	Exp.reven...
+ Not assigned	1											1,500	1		
+ resource2 esmaster	1											50,000			
+ Sales team	1														
	1		2									2		51,500	1

## SYSTEM PARAMETERIZATION

In order to obtain the system parameterization of Entersoft CRM we need to follow the steps below:

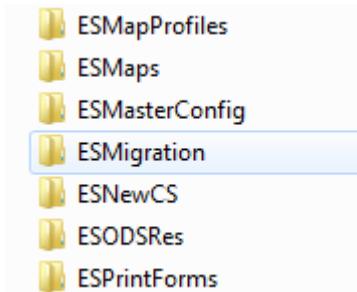
1<sup>st</sup> step: We select from the menu **Tools/Data import/export→Import data (advanced mode)...**



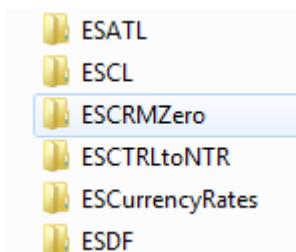
2<sup>nd</sup> step: We select **Files\Open** in order to search the appropriate .emi file



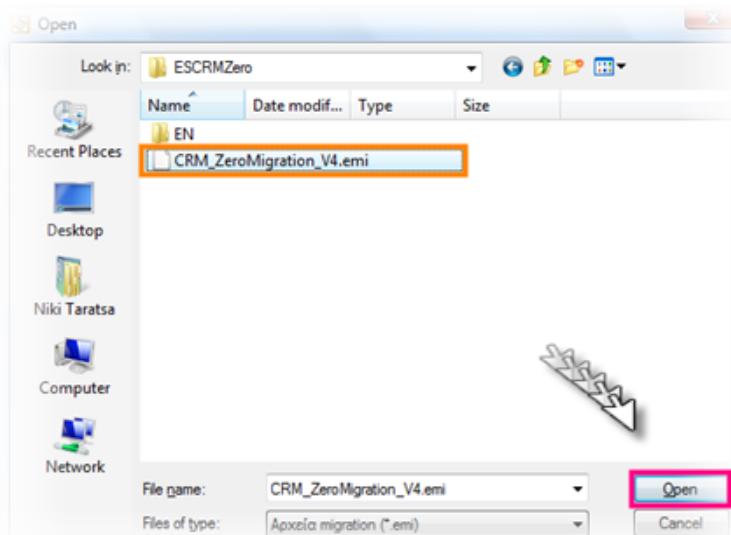
3<sup>rd</sup> step: We select the **ESMigration** area



4<sup>th</sup> step: We select the **ESCRMZero** area



5<sup>th</sup> step: We select the **CRM\_ZeroMigration\_V4.emi** file



**6<sup>th</sup> step:** Is **especially significant** to **correctly** define (and not to leave the default value) to the **Source Space** field, this means to define the area where the field that was selected to **5<sup>th</sup> step** is found this is the **CRM\_ZeroMigration\_V4.emi** file

This screenshot shows the 'ES CRM ZeroDB' maintenance interface. At the top, there are tabs for 'Files', 'Tools - maintenance', 'Run', 'Time scheduling', and 'Define parameters...'. Below this, a 'Description' field contains the text 'Εισαγωγή παραμετροποίησης ES\_CRM ZeroDB'. The 'Source space' field is highlighted with a red box. A large red arrow points from the 'Source space' field towards the 'Run' button. In the top right corner of the main area, there is a small red circle around the three-dot menu button.

**7<sup>th</sup> step:** The last action concerns the **Run** option in order ESCRM Parameterization Insertion to be completed.

This screenshot continues the 'ES CRM ZeroDB' maintenance interface. The 'Run' button is highlighted with a red box and has a red arrow pointing to it. A progress dialog box is overlaid on the main screen, indicating the status of step 47: 'Import data to current table 'Task means''. The progress bar shows 54%. The dialog also displays the command: 'Import data to current table 'Task means' from table 'ESTMTaskMedia' which was created by a previous step.' At the bottom of the dialog, there are buttons for 'Frequency' and 'Cancel'.