

Last update : 05/05/2015



## USER GUIDE & MANUAL

VIRTUAL STACKS SYSTEMS,LLC  
650 TECHNOLOGY PARK,  
LAKE MARY, FL 32746

This manual contains material protected by Copyright. Any unauthorized reprint or use of this material is prohibited. The republication, reproduction or commercial use of any substantial part of the Manual in any manner whatsoever, including electronically, without the prior written permission of Virtual Stacks Systems, LLC is strictly prohibited.

# TABLE OF CONTENTS

❖ <i>Overview</i>	1
❖ <i>Setting up eZnet CRM</i>	2
❖ <i>Basics of eZnet CRM</i>	3
Action Icons	3
Navigate Records	3
Search/Filter Tools	3
Custom/Filter Views	4
Active/Inactive Status	5
❖ <i>Getting Started</i>	6
Organization Settings	6
eZnet CRM Dashboard	8
Users and Permissions	9
User Log	12
Create Group	13
❖ <i>Administrative Settings</i>	15
Manage Territory	15
❖ <i>Data Administration</i>	17
Importing and Exporting	17
Document Library	18
- Upload Documents	18
- Add Documents to Lead, Opportunity, Ticket, Quotes ,Campaign and Event/Task	19
Customer Documents	21
Templates	22
❖ <i>Inventory Management</i>	23
❖ <i>Customer Support</i>	25
Ticket	25
❖ <i>Sales Automation</i>	28
Leads	28
- Create Lead Reports	29

Customer	33
Contacts	32
Quotes	33
Opportunity	36
Sales Forecast (Probability)	36
Opportunity Tracking	37
Closing	37
<b>    <i>Marketing Automation</i></b>	<b>39</b>
Add Campaign to Lead, Quote and Opportunity	40
`	
<b><i>Social CRM</i></b>	
<b>Calendar</b>	<b>45</b>
Schedule/Activities	45
Schedule Events/Tasks in Lead, Opportunity, Ticket, Quotes and Customer	46
Reminders/Notifications	47
<b>    <i>Billing and Payments</i></b>	<b>49</b>

## Client System Requirements

**Operating System :** Windows, Linux, and Mac OS X

**Web Browser :** Safari 4 and above  
 Chrome 17 and above  
 Firefox 17 and above  
 Internet Explorer 9 and above

**Other Requirements:** Enable JavaScript  
 Enable Cookies  
 Install Flash Plug in  
 Install Acrobat Reader (optional)

## Overview

eZnet CRM is an on-demand, cloud customer relationship management (CRM) software that allows you to create the ultimate dashboard for you and your employees. eZnet CRM organizes all of your leads, campaigns, contacts, tickets and much more. You can also streamline your marketing organization, inventory management and customer support from a personalized dashboard.

# SETTING UP eZnet CRM

The initial setup of your eZnet CRM dashboard is easy and takes just minutes to create. Tailor your CRM in many ways to make it more functional for your business. You will be introduced to a number of useful functions and concepts that will help you start working with your CRM account. It will provide you with the information required to complete the most essential tasks needed to get started.

## **Account Setup**

Start setting up your eZnet CRM account by adding your company details and personal information. You can then create roles, add users and profiles according to your organization's requirements.

## **Sales and Marketing Customization**

Organize all of your leads, campaigns, opportunities and more with the sales and marketing automation functions.

## **Product Customization**

Customize your account based on your industry standards and business requirements. You can begin by customizing fields, page layouts, themes, tabs and list views.

## **Common Operations**

Take a quick glance into some of the common operations such as exporting, navigating and searching records in eZnet CRM.

## **Personal Settings**

First, personalize your CRM account by changing location, time zone and logo.

## **Company Details**

Add your company details such as the company name for your business communication, country location, time zone and also the company logo. Note that Company Logo image file size should not exceed 20 KB and for best results, use an image with 190 (width) by 65 (height) pixel dimensions.

## **Users**

Add users to your CRM account and assign them roles and profiles. Please note that only after you add a user to your account, will you be able to add new profiles and roles.

## **Profiles**

Create profiles that define the access permissions to the various CRM modules and features.

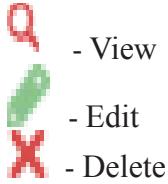
## **Roles**

Set up the organization-wide hierarchy by creating Roles and assigning it to users.

# Basics of eZnet CRM

Learn more about the software that is changing the way businesses organize their clients and customers. This detailed overview goes over terminologies and various modules available with eZnet CRM.

When these action icons are displayed on a list, you are allowed to perform the following functions:



## **Navigate Records**

View various records using the arrow located in the modules.

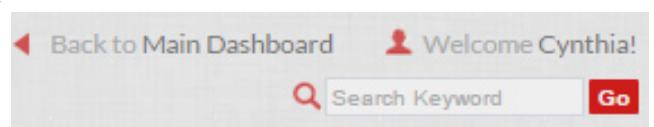
## **Search/Filter Tools**

There are four types of search bars in eZnet CRM. Based on the module you choose, you may encounter one of three search bars as seen below.

Three side-by-side screenshots of search/filter tools. The left screenshot shows a 'Filter:' section with dropdowns for 'All' and '+', followed by 'Search By:', 'Keyword:', and 'Order By:' sections with dropdowns for 'All', 'Desc', and 'Search' buttons. The middle screenshot shows 'From Date:' and 'To Date:' date pickers above 'Search By:', 'Keyword:', and 'Order By:' sections. The right screenshot shows a simplified 'Search By:', 'Keyword:', and 'Order By:' structure. All three have a 'Search' button at the bottom.

These are visible on the right side of various modules and can be used to filter and search for specific information in the CRM.

In addition to these tools, there is another search tool visible on the top right-hand side of the CRM. You can search for any text-based information imported or inputted in eZnetCRM.



## Custom/Filter Views

As a user of eZnet CRM, you have the capabilities of accessing customized lists. On the right-hand side of your CRM, you will notice a Search or Filter column. To customize your view, select the red plus sign (as indicated by arrow).

The screenshot shows a 'Filter' interface. At the top is a dropdown menu set to 'All' with a red plus sign icon below it. Below this are sections for 'Search By' (set to 'All'), 'Keyword' (an empty input field), and 'Order By' (set to 'Desc'). A large red 'Search' button is at the bottom.

After selecting the red plus sign, you are brought to the page below that allows you to customize how you view the modules. This customization option is available in the **LEAD, OPPORTUNITY, TICKET, QUOTES, CAMPAIGN, CONTACT, CALENDAR** and **CUSTOMER** modules.

This screenshot shows the 'Details' section of a view configuration. It includes fields for 'View Name' (set to 'Random'), 'Set as Default', and 'Set as Public'. Below this is the 'Choose Columns' section, which lists columns: Lead ID, First Name, Product, Company, and Assigned To. Under the 'RULE' section, there are five rows of dropdown menus for each column, all currently set to 'None'. At the bottom are 'Save' and 'Cancel' buttons.

Select the columns you would prefer to list and implement rules to filter your results. You may include or exclude specific information. Your customized filter can be made private, public for your default view.

## Manage Lead

[Add Lead](#)  [Quick Entry](#)  [Print](#)  [Export To Excel](#)  [Import Lead](#)

[Delete](#)

Lead ID	First Name	Product	Company	Assigned To	Action	<input type="checkbox"/>
4	Tilly	Not specified.	Not specified.	Not Specified		<input type="checkbox"/>
3	Jane	Not specified.	Not specified.	Neil Lightyear, Jheanelle Soyibo,		<input type="checkbox"/>

Total Record(s) : 2 Page(s) : 1

After your filter has been saved, CRM will display the information based on the columns and parameters including the name of the filter.

Lead Search

Filter:

Random

Search By:

All

Keyword:

Order By:

Desc

**Search**

## Active/Inactive Status

In eZnet CRM, you may deactivate **USER**, **ITEM**, **CONTACT**, **OPPORTUNITY** or **LEAD** without deleting the details. If the record is Inactive, it is unable to populate any of the fields in eZnet CRM. You will have to convert the status to **Active** to utilize the record.

To change the status of an **Inactive** record, simply click the status.



You should see the change in status immediately, indicated by the green words **Active**.

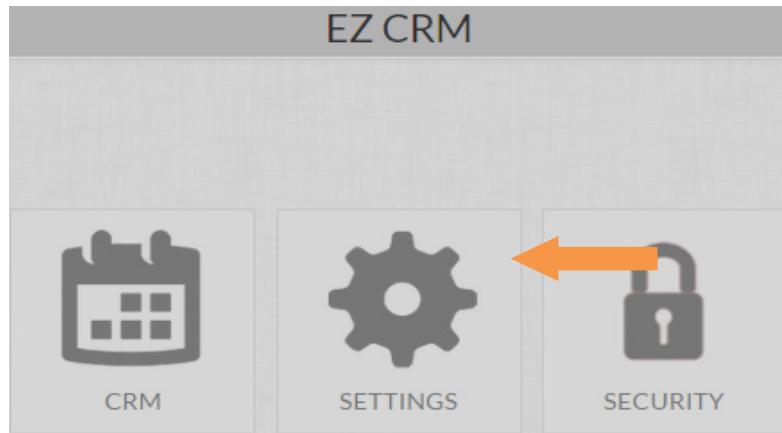
*Note : Only full-service administrators have the ability to change user status.*

# Getting Started

## Organization Settings

Start setting up your CRM by first creating a company and setting your company's location. Login to your eZnet CRM and you will be taken to the Main Login page. Select **SETTINGS** and this will take you to the Company Settings page where you can Edit Company Profile, Locations, manage users Dashboard and Call Settings.

*From Main Login Page : Settings > Edit Company Profile > Company Location*



This selection will take you to the **COMPANY SETTINGS** page where you can Edit Company Profile including name, address, description, logo etc.

The screenshot shows the "Edit Company Profile - Company Details" page. On the left, there is a sidebar with a "Main Menu" and three items: "Edit Company Profile" (which is highlighted with a red box), "Company Location", and "Dashboard Icon". The main content area has a title "Company Details". It contains several input fields: "User Limit: 10", "Total Storage: Unlimited", "Company Name: EZ CRM", "Description: Cloud-based customer relation management", "Upload Logo: Choose File No file chosen", "Contact Person: DEMO", "Address: 650 technology Park", "Country: United States", "State: Florida", "City: Lake Mary", "Zip Code: 32746", "Alternate Email: cynthia@virtualstacks.com", "Mobile: 1111111111", "Landline: 8773684446", "Fax: ", and "Website URL: (Website URL, should start with http://)". At the bottom right is a red "Update" button. On the right side of the page, there is a sidebar with the "EZ CRM" logo and two menu items: "Company Details" and "Global Settings". A red arrow points from the text "Upload Company logo here" to the "Choose File" button. Another red arrow points from the text "Company Details" to the "Company Details" menu item in the sidebar.

Continue to edit your company's profile by selecting **Global Settings tab** to track inventory, timezone and format the date.

The screenshot shows the 'Edit Company Profile > Global Settings' page. On the left, a sidebar lists 'Main Menu', 'Edit Company Profile' (selected), 'Company Location', and 'Dashboard Icon'. The main area has tabs for 'Inventory Settings' (selected) and 'Time Inventory'. Under 'Currency Details', the 'Base Currency' is set to 'US Dollar'. The 'Additional Currencies' dropdown lists over 50 currencies from around the world. Below this is the 'DateTime Settings' section, which includes a 'Timezone' dropdown set to 'EST', a clock icon showing the current time, and sections for 'Server Timezone' and 'Date Format'. The 'Records Per Page' dropdown is set to '20'. At the bottom right are standard CRM navigation icons.

You may choose a Base Currency accompanied by an Additional Currency. The Base Currency is the default in which all transactions are conducted, while the Additional Currencies are chosen when they are needed.

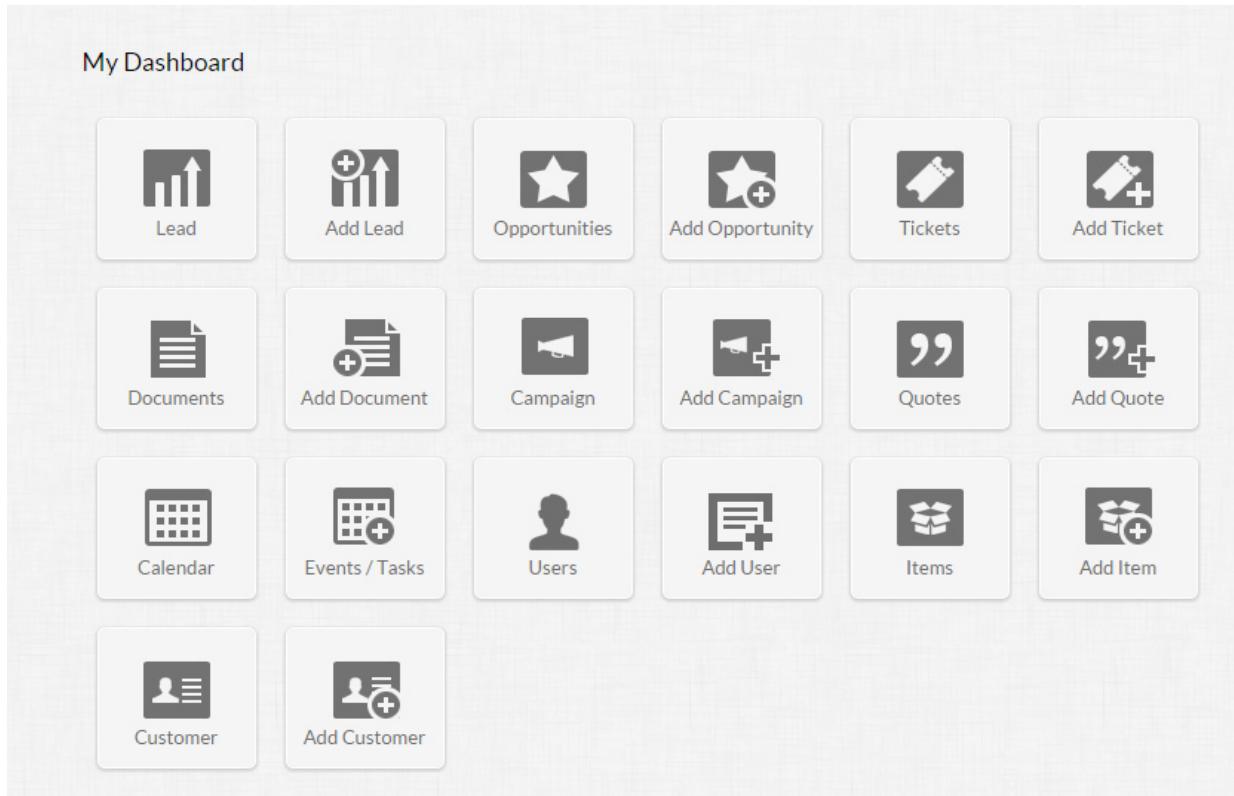
If the company has various locations, you are also able to add each location in the **Company Location tab**.

Company Location								<b>+ Add Location</b>
Address	City	State	Country	Zip Code	Timezone	Status	Action	
650 technology Park	Lake Mary	Florida	United States	32746	-05:00	Active		Primary Location
<b>Total Location : 1</b>								

After updating the information in the company settings, all these details will reflect in your organization's CRM account.

## eZnet CRM Dashboard

The dashboard is your control panel. It is your **HOME** for all functions in eZnet CRM. You can do everything from your dashboard, including: change company settings, account settings, add users as well as, add new opportunity, campaign amongst other features.



The dashboard is the main component of the CRM, and the modules are based on the roles/permissions of the user.

## Types of Users

In eZnet CRM, a user is anyone who can manage a record, their own or others shared by other users within your organization.

**Administrators:** Users who can access the entire system. There must be at least one Administrator for accessing all functions and features in your eZnet CRM account. *Example: CEO or any top officials or management.*

**Standard Users:** Users who can access data according to the defined permissions (profiles) and roles defined by the Administrator. They may be employees and non-employees. *Example: Sales Managers, Marketing Managers, Consultants, etc.*

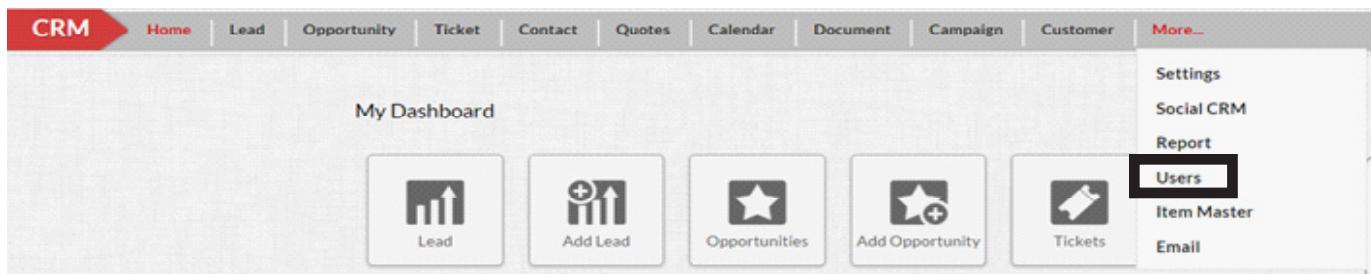
### Add User Accounts

Based on the responsibilities and tasks of the department or individual, you can create accounts that utilize the various functions in eZnet CRM. Adding a user can only be performed by those authorized to do so.

*Note : Users with limited access cannot add, change or edit USERS.*

## From Dashboard: More > User > Add User

To add a new user in eZnet CRM, hover over “More” and select “User”, a seen below.



You will be taken to this screen where you can add or modify user information. Input the necessary fields indicated by an asterisk and press submit, and a unique user code will automatically generate.

Manage Users > Add User ◀ Back

**Personal Details**

New Employee:	<input type="button" value="Yes"/>	Gender:	<input type="radio"/> Male <input type="radio"/> Female
User Code:	<input type="text"/>	Last Name:	<input type="text"/>
First Name:	<input type="text"/>	Joining Date:	<input type="text"/> <input type="button" value="Calendar"/>
Date of Birth:	<input type="text"/> <input type="button" value="Calendar"/>	Upload Photo:	<input type="button" value="Choose File"/> No file chosen
Designation:	<input type="text"/>		

**Contact Details**

Personal Email:	<input type="text"/>
Contact Address:	<input type="text"/>
Country:	<input type="button" value="United States"/>
State:	<input type="button" value="... Select State ..."/>
Other State:	<input type="text"/>
Other City:	<input type="text"/>
Zip Code:	<input type="text"/>
Mobile:	<input type="text"/>

**Account / Login Details**

Email:	<input type="text"/>
Password:	<input type="password"/> (Password Limit: 5 to 15 characters.)
Confirm Password:	<input type="password"/>
Status:	<input type="radio"/> Active <input type="radio"/> InActive

*Note: Designation refers to the department or group that you would like to associate with the user.*

## Users and Permissions

### Change Users and Permissions

Users with the Manage User's permission in their profile can access the user list and perform tasks such as adding users, modifying user details and view the apps and add-ons that are activated for each user.

With users and permissions, you create roles and distinguish objectives that you can track and report. Users can also be grouped and assigned multiple tasks and add other elements to a user such as **EVENTS**, **LEADS** or **OPPORTUNITIES**.

### Delete User Account

To remove a user from eZnet CRM, proceed to the list in the manage **USER**'s module and select the red **x**.  
Manage Users

User Code	Name	Designation	Email	Joining Date	Status	Action
0000-000	Jheanelle Soyibo	Marketing	testing2@virtualstacks.com	November 14, 2014	Active	

By clicking the red **X**, information relating to the user will be deleted.

### Deactivate/Activate Users

If you want to keep the information of the user, without them having access to the CRM, you have the option to deactivate their account.

Administrators can deactivate user accounts, which hinder the account from accessing eZnet CRM. To deactivate an active account, please refer to [Basics of eZnet CRM](#).

### Roles

When setting up eZnet CRM, your users should have designated roles, based on the department and responsibilities they have. First, the Administrator must create these roles in **SETTINGS** in order to assign them.

*Example: Marketing, Sales, Supervisors, etc.*

The roles given to each user determines what functions they will have on their CRM Dashboard. The Administrator also has the permission to edit the CRM dashboard of any user.

### From Dashboard: User > Edit > Role/Permission

To create/edit the activated user's CRM dashboard, select EXPAND ALL to display the modules and select the functions that are necessary for the user. There are three levels of access to choose for each module: View, Modify or Full.

The photo above displays the Administrator's view of the Role/Permission of the **USER** module in the CRM. The panel gives the Administrator or full-access user the ability to modify modules shown on the dashboard of other users. The Administrator has to give the full-access user permission to adjust this setting.

## Permissions

Based on the duties and responsibilities of the eZnet CRM user, they will be able to utilize certain functions based on the **ROLES / PERMISSIONS** given by the Administrator.

To change/grant permission of a user, **from dashboard : User > View User > Role/Permission > Edit**

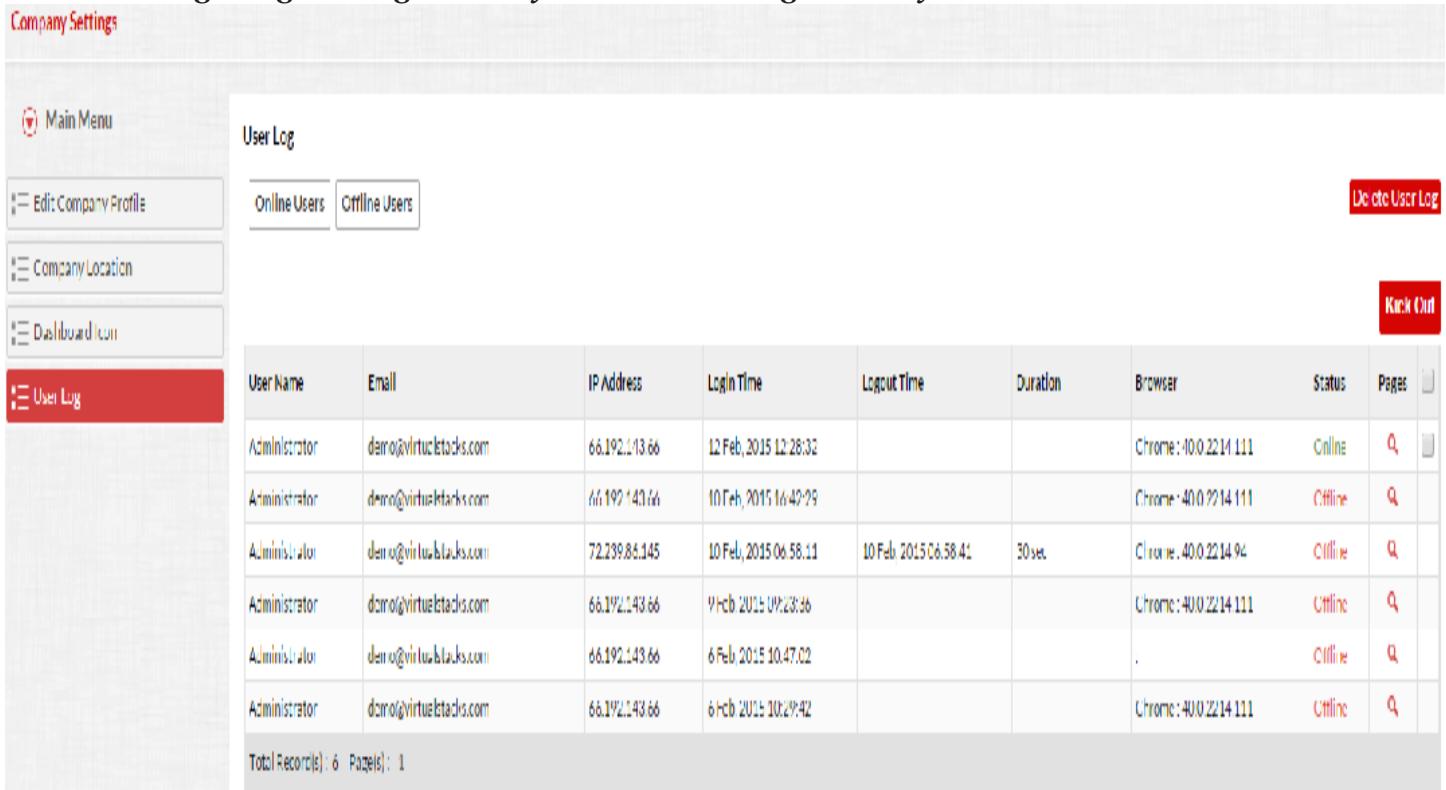
*Note: The edit role/permission page will display, ONLY if you are the Administrator.*

Appointing a role for a user determines whether or not they can view their own records and records of other users.

## Session Log

The Users' Log, located in the Company settings is a list of all offline and online users of eZnet CRM.

**From Main Login Page: Settings> Security or From Main Page : Security**

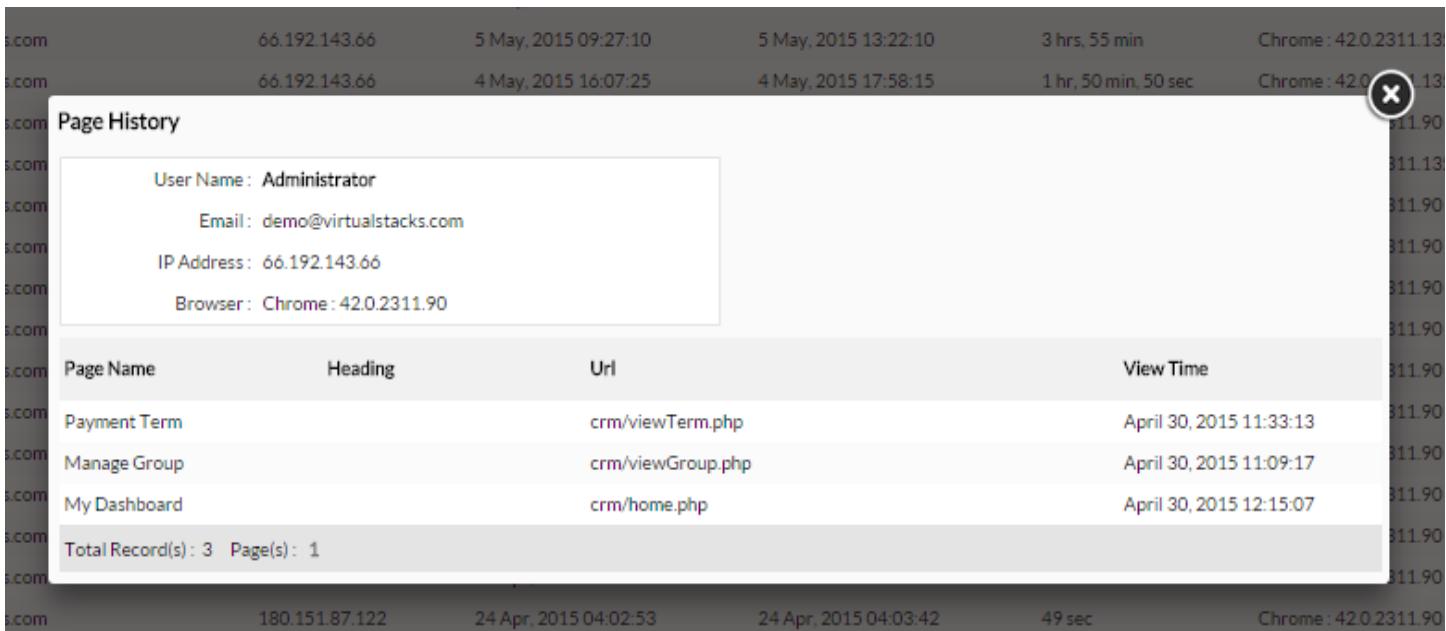


The screenshot shows the 'User Log' section of the eZnet CRM interface. On the left, there's a sidebar with links like 'Main Menu', 'Edit Company Profile', 'Company Location', 'Dashboard Icon', and 'User Log' (which is highlighted in red). The main area has tabs for 'Online Users' and 'Offline Users'. A large red button at the top right says 'Delete User Log'. Below these are buttons for 'Delete User Log' and 'Kick Out'. The main table lists user sessions with columns for User Name, Email, IP Address, Login Time, Logout Time, Duration, Browser, Status, and Pages. The table shows six entries for different administrators. At the bottom, it says 'Total Record(s): 6 Page(s): 1'.

User Name	Email	IP Address	Login Time	Logout Time	Duration	Browser	Status	Pages
Administrator	demo@virtualstacks.com	66.192.143.66	12 Feb, 2015 12:28:32			Chrome:40.0.2214.111	Online	Q
Administrator	demo@virtualstacks.com	66.192.143.66	10 Feb, 2015 16:49:29			Chrome:40.0.2214.111	Offline	Q
Administrator	demo@virtualstacks.com	72.239.85.145	10 Feb, 2015 08:58:11	10 Feb, 2015 08:58:41	30 sec	Chrome:40.0.2214.94	Offline	Q
Administrator	demo@virtualstacks.com	66.192.143.66	9 Feb, 2015 09:23:36			Chrome:40.0.2214.111	Offline	Q
Administrator	demo@virtualstacks.com	66.192.143.66	6 Feb, 2015 10:47:02			.	Offline	Q
Administrator	demo@virtualstacks.com	66.192.143.66	6 Feb, 2015 10:29:42			Chrome:40.0.2214.111	Offline	Q

*Note : Session Log is available for the Enterprise account only.*

The **Session Log** records the credentials and sessions of each user of eZnet CRM and includes the login and logout times, as well as the **IP address**, **Duration**, **Browser** and **Current Status** of the user. You are able to filter this list by online and offline users by choosing the respective tabs indicated by arrow in the photo above. You may delete the entire log or Kick Out users that are currently online.



This screenshot shows the 'Session Log' page with a 'Page History' overlay. The main table lists sessions for different users with columns for Page Name, Heading, URL, and View Time. The 'Page History' overlay shows details for a specific session: User Name: Administrator, Email: demo@virtualstacks.com, IP Address: 66.192.143.66, and Browser: Chrome:42.0.2311.90. At the bottom of the page, it says 'Total Record(s): 3 Page(s): 1'.

Page Name	Heading	Url	View Time
Payment Term		crm/viewTerm.php	April 30, 2015 11:33:13
Manage Group		crm/viewGroup.php	April 30, 2015 11:09:17
My Dashboard		crm/home.php	April 30, 2015 12:15:07

For further information regarding offline and online users, you can view the **Page History** of the specific user, as seen in the previous photo. It provides information such as the **Page Name, Heading, URL** and view the **Time** of each session for the User.

## Create Groups

eZnet CRM allows Administrators to create groups of users assigned to a category. *Example: Interns, Web Design Team, Kitchen Staff, etc.*

To access this function, **from the Dashboard: Settings > Manage Group > Add Group.**

The screenshot shows the 'Manage Group' page. On the left is a sidebar with a 'Main Menu' icon and a 'Manage Group' button, which is highlighted in red. Below these are several other menu items: Lead Source, Ticket Category, Sales Stage, Lead Industry, Campaign Type, Expected Response, Email Template, Activity Status, and Activity Type. The main area is titled 'Manage Group' and contains a table with two rows. The first row has 'Administration' as the group name, 'Test' as the description, 'Active' status, and a green 'Edit' icon with a red 'X'. The second row has 'Lead Stars' as the group name, 'These individuals are responsible for creating new leads for EZ CRM' as the description, 'Active' status, and a green 'Edit' icon with a red 'X'. At the bottom of the table, it says 'Total Record(s): 2 Page(s): 1'. In the top right corner of the main area, there is a red button with a white plus sign and the text 'Add Group'.

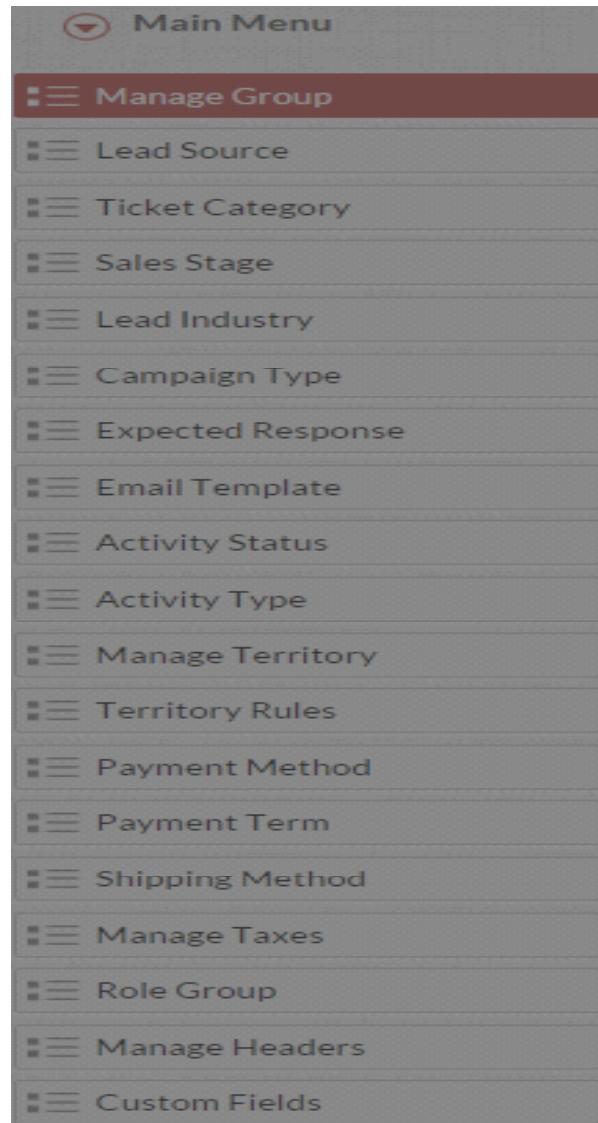
Selecting **Add Group** will take you to the screen below, where you can create the group and the users that belong to it.

The screenshot shows the 'Add Group' form. At the top right is a 'Back' button. The form has a title 'Group'. It contains fields for 'Group Name:' with a required asterisk, 'Users:' with a required asterisk, and 'Status:' with radio buttons for 'Active' (selected) and 'Inactive'. Below these are 'Description:' and a rich text editor toolbar. At the bottom is a red 'Submit' button.

On this screen, you can also activate/deactivate groups and modify the users in the group.

# Administrative Settings

In eZnet CRM, the all-access Administrator has control over all the functions of the users. They can modify, activate and deactivate various options by using the action items available in each menu. The individual has the ability to add options available for other users in the modules below.



**From Dashboard: Settings > Lead Industry**

Each tab represents a module in CRM that can be modified by those with permission.

*Example: Lead Industry list includes IT, Media, Retail, Hospitality, etc.*

Manage Lead Industry

Lead Industry	Status	Action
IT	Active	
Retail	Active	
Hospitality	Active	
Media	Active	

A user with permissions, may add/delete a Lead Industry item, that will be available for other users to manage.

Main Menu

- Manage Group
- Lead Source
- Ticket Category
- Sales Stage
- Lead Industry**
- Campaign Type
- Expected Response

Manage Lead Industry > Add Lead Industry

Lead Industry :

Status :  Active  Inactive

**Submit** **Reset**

In the example, the user added “Military” to Lead Industry list.

Manage Lead Industry

Lead Industry has been added successfully.

**Add Lead Industry**

Lead Industry	Status	Action
IT	Active	
Retail	Active	
Hospitality	Active	
Media	Active	
Military	Active	

Total Record(s): 5

Military is now added on the list

Now the users of the CRM have the option to add “Military” as an industry to their Leads.

Manage Lead > Edit Lead Details

Lead Details

Created Date : December 9, 2014

Lead Type :

First Name :

Last Name :

Primary Email :

Title :

Product :

Product Price (USD):

Website :

Industry :

Annual Revenue (USD):

Number of Employees :

Lead Status :

Lead Source :

Lead Date :

Assigned To :  Users  Group

Last Contact Date :

Industry :

The photo above displays the **LEAD** module with the newly added Lead Industry in the Administrative Settings.

## Territory

A territory is the division of the sales structure by which customers' accounts are grouped and shared with the sales people of an organization. Territories can be based on various factors such as geography, industry, product line, expected revenue, verticals, etc.

### Manage Territory

Territory Management is a function by which customer accounts and users are grouped based on a defined geographic criteria. This makes it easy to share customer accounts among different sales teams in your company.

#### Add Territory

Users with an Administrator profile can create **Territories**. Territory managers also have the default privilege to create sub-territories.

To create Territories in eZnet CRM :

*From Dashboard: Settings > Manage Territory > Add Territory*

Manage Territory > Add Territory Back

**Territory**

Select Parent Territory: US

Territory Name: \* Midwest

Status:  Active  Inactive

**Submit** **Reset**

In the screen above, choose a name, Territory Root and Submit.

If the submission is successful, your Territory name will be added to the list as seen below.

Manage Territory

**Add Territory**

Territory Name	Status	Action
US	Active	
Eastern	Active	
Western	Active	
Southern	Active	
Midwest	Active	

You can also activate and deactivate Territories as needed.

## Territory Rules

Territory rules identify the sub-territories and Territory Manager. Creating territory rules requires the Administrator to specify criteria, based on which territories are assigned to accounts.

The screenshot shows a left sidebar with various navigation options like Main Menu, Manage Group, Lead Source, etc., and a red-highlighted 'Territory Rules' option. The main area is titled 'Manage Territory Rules' and contains a table with three rows. The columns are Sub Territory Name, Territory Name, Territory Manager [Sales Person], and Action. The first row has 'Eastern' as the sub territory, 'US' as the territory name, a user icon for 'Jheanelle Soyibo', and a red 'QX' button. The second row has 'Southern' as the sub territory, 'US' as the territory name, and a red 'QX' button. The third row has 'States with C' as the sub territory, 'US' as the territory name, and a red 'QX' button. A footer bar at the bottom shows 'Total Record(s): 3 Page(s): 1'.

Sub Territory Name	Territory Name	Territory Manager [Sales Person]	Action
Eastern	US	Jheanelle Soyibo	<span style="color: red;">QX</span>
Southern	US		<span style="color: red;">QX</span>
States with C	US		<span style="color: red;">QX</span>

The screen above demonstrates the window where you can delete/view details and assign sub-territories to sale personnel.

## Payment Method

In this setting, you can add, modify, activate or deactivate payment methods you are willing to accept at your organization.

The screenshot shows a table of payment methods. The columns are Payment Method, Status, and Action. The methods listed are Cash, Direct Debit, Credit Card, Electronic Transfer, Check, and NetBanking, all marked as Active with a green checkmark icon and a red 'X' button. A footer bar at the bottom shows 'Total Record(s): 6'.

Payment Method	Status	Action
Cash	Active	<span style="color: red;">X</span>
Direct Debit	Active	<span style="color: red;">X</span>
Credit Card	Active	<span style="color: red;">X</span>
Electronic Transfer	Active	<span style="color: red;">X</span>
Check	Active	<span style="color: red;">X</span>
NetBanking	Active	<span style="color: red;">X</span>

### Settings > Payment Method > Add Payment Method

To add a payment, select the **Add Payment Method** button, and input the payment you would like to add, as shown in the next photo.

Payment Method :*	<input type="text" value="Paypal"/>
Status :	<input checked="" type="radio"/> Active <input type="radio"/> Inactive
<b>Submit</b> <b>Reset</b>	

When you have added the **Payment Method**, the message below will show to signify that your entry is complete. You may add a payment and change status to active or inactive simu

Payment Method has been added successfully.

## Payment Term

Payment term refers the conditions under which the vendor completes the sale. It applies to any party involved with the point of transaction, from the wholesaler to the customer. **Net (Days)** is the amount of days an invoice is expected to be paid in full. **Due in (days)** is the specific day the bill is due, after this date, the bill will become overdue.

### Settings > Payment Term

**+ Add Payment Term**

Term Name	Net (days)	Due in (days)	Status	Action
Direct Debit	30		Active	 
Cash	52	22	Active	 
Electronic Transfer	12		Active	 
Transfer	34	50	Active	 
Immediate Payment	1		Active	 

Total Record(s) : 5 Page(s) : 1

### Settings > Payment Term > Add Payment Term

To add a payment term, select the **Add Payment Term** button, and input the payment term you would like to add, as shown in the next photo.

Term Name :*	<input type="text" value="Paypal"/>
Net :*	<input type="text" value="5"/> (days)
Due in :	<input type="text" value="25"/> (days)
Status :	<input checked="" type="radio"/> Active <input type="radio"/> Inactive
<b>Submit</b>	

When you have filled in the **Term Name**, **Net** and **Due In** fields and selected an active or inactive status, press Submit to complete your task.

## Shipping Method

The shipping method allows you to add, delete and modify shipping methods. The options added in this setting will be used in other fields as options. To add a shipping method, refer to the following steps :

### Settings > Shipping Method

To add the another method of shipping select “**Add Shipping**”.

Shipping Method

Shipping Method		
	Status	Action
DHL	Active	 
UPS	Active	 
USPS	Active	 
ASOS	Active	 
Fedex	Active	 

Total Record(s) : 5

When you select “**Add Shipping**” the screen below will appear. Input the information that you wish to add and select submit.

Shipping Method » Add Shipping Method

Shipping Method :\* Mediterranean Shipping Company

Status :  Active  Inactive

**Submit** **Reset**

When you have completed this task, the list will populate with the newly added shipping method and a message above

Shipping Method

Shipping Method has been added successfully.

 Add Shipping Method

Shipping Method		
	Status	Action
DHL	Active	 
UPS	Active	 
USPS	Active	 
ASOS	Active	 
Fedex	Active	 
Mediterranean Shipping Company	Active	 

Total Record(s) : 6

## Manage Taxes

One of eZnet CRM's advantage is the ability to customize the minor details that count. This particular setting is advantageous when you conduct business nationally and internationally. You are able to input multiple tax rules that may later be suitable when creating quotes, shipping and sales orders. To manage taxes in eZnet CRM, refer to the following steps.

### Settings > Manage Taxes > Add Taxes

To add a tax rule select “Add Tax” located on the right side of the Manage Taxes area.

Manage Taxes



Tax Rate Name	Tax Rate	Tax Location	Status	Action
Vat	12.36%	India - Delhi	Active	✓ X
Excise Duty	12.50%	India - Delhi	Active	✓ X
Packing & Forwarding	10.00%	India - Delhi	Active	✓ X
Total Record(s): 3 Page(s): 1				

Select the “Add Tax” button and the screen below will appear, input a **Tax Name, Country, State and Tax Rate** where the rule applies.

Manage Tax > Add Tax

Back

Tax

Tax Name: California

Country: United States

State: California

Tax Rate %: 7.5

Status: Active

Submit

After you have submitted the necessary information, a list will populate with the newly added tax rules. Also, a message will generate, as seen below.

Manage Taxes

Tax has been added successfully.

Add Tax

Tax Rate Name	Tax Rate	Tax Location	Status	Action
Excise Duty	12.50%	India - Delhi	Active	✓ X
Packing & Forwarding	10.00%	India - Delhi	Active	✓ X
California	7.50%	United States - California	Active	✓ X
California	7.50%	United States - California	Active	✓ X
Total Record(s): 4 Page(s): 1				

You may edit, delete or change the status of any tax rules in this list.

## **Role Group**

A role group is a set of users that have similar access to the various modules in eZnet CRM created by the Administrator.

## **Manage Headers**

eZnet CRM allows you modify the forms and modules within the system. The following modules are available to be edited are : **Lead, Opportunity, Ticket, Contact, Quotes, Calendar, Document, Campaign** and **Customer**.

**Settings >**

## **Custom Fields**

# Data Administration

## Importing and Exporting

When given the option to import a document in eZnet CRM, it must be formatted as an .xls or .csv file. You encounter this option in the **Lead**, **Item Master** and **Customer** modules. However, in the **Item Master**, it is recommended to download the template that includes **SKU**, **Item Name**, **Price**, **Quantity**, **Description** and **Status**.

The screens below illustrates how to Import a **Lead**, **Item** or **Customer**.

### ***Lead > Import Lead***

Before importing the Lead spreadsheet ensure that: First Name, Last Name, Street Address and Phone Number are mandatory headings in the spreadsheet you are attempting to upload.

Main Menu

Manage Lead

Manage Lead > Import Lead

Import Excel Sheet:  No file chosen  
Import sheet must be in .xls format and should be same as template downloaded from above "Download Template" button.

Duplicacy Column:

Upload

Back

### ***Item Master > Import Item***

Main Menu

Manage Items

Manage Items > Import Item

Import Item Sheet:  No file chosen  
Import sheet must be in .xls format and should be same as template downloaded from above "Download Template" button.

Upload

Download Template

Back

### ***Customer > Import Customer***

Manage Customer

Manage Customer > Import Customer

Import Customer Sheet:  No file chosen  
Import sheet must be in .xls format and should be same as template downloaded from above "Download Template" button.

Upload

Download Template

Back

If your upload is successful, a list will populate with the necessary information, creating a Lead, Item or Customer List.

*Note : To have a successful upload, please ensure that the first column is not blank.*

## Exporting

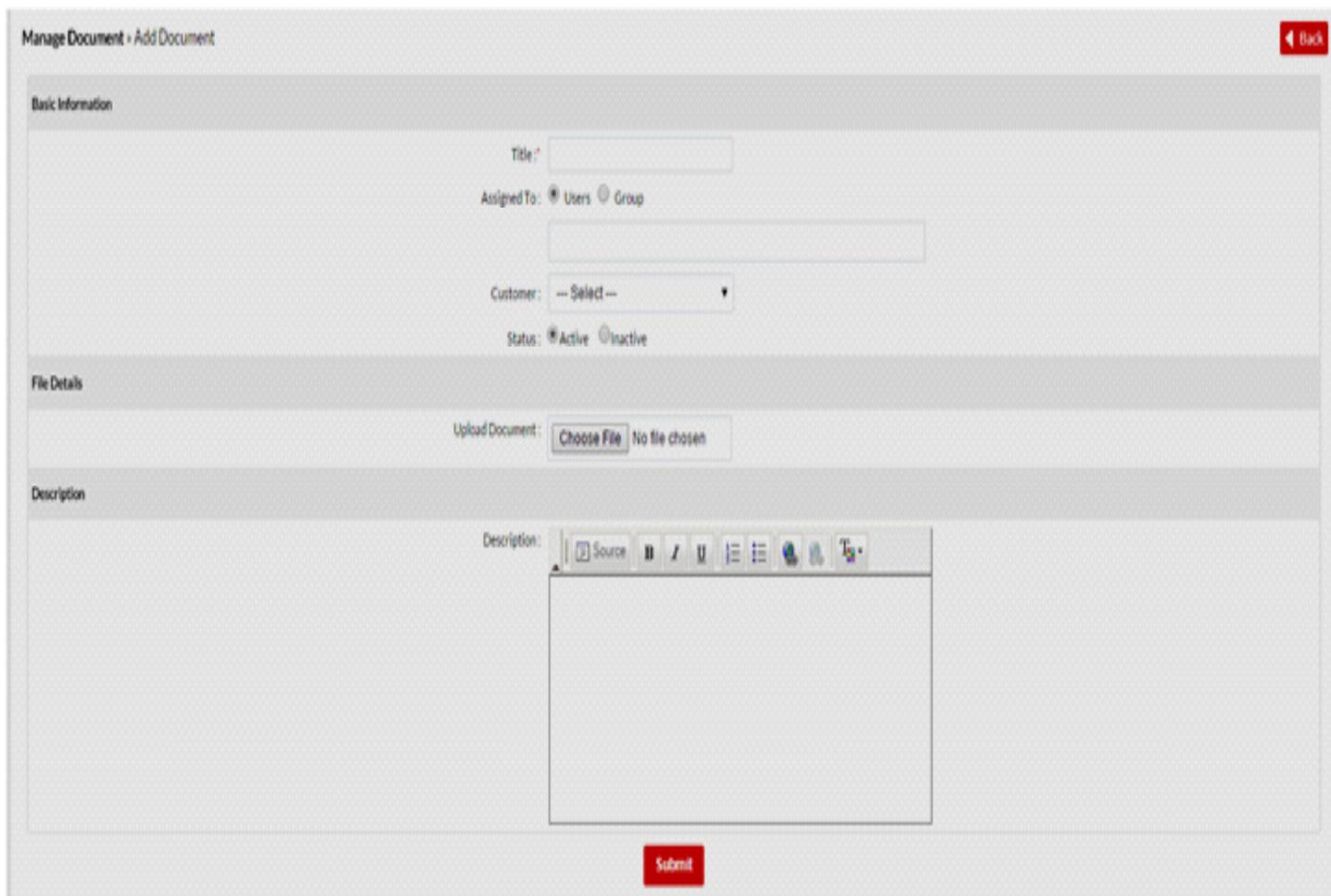
In eZnet CRM, you have an option to export or download documents and templates available in the system. Modules displaying Download  **Download** Export to Excel  **Export To Excel** or Export to PDF  **Export To Pdf** can be downloaded for offline use.

## Document Library

Manage all your business-related documents in a single place for easy access and storage space. Documents from **Lead, Opportunities, Tickets, Quotes, Campaigns, Events** and **Customer** modules are accumulated here. The Documents module is a central repository where you can upload and download documents and associate them with various records.

## Upload Documents

Documents can be stored and assigned to various users or groups in eZnet CRM . The screen below demonstrates the upload screen.



Manage Document > Add Document Back

**Basic Information**

Title:

Assigned To:  Users  Group

Customer: -- Select --

Status:  Active  Inactive

**File Details**

Upload Document:  No file chosen

**Description**

Description:

**Submit**

Input the necessary information as seen in the next photo to have a successful upload.

Manage Document > Add Document ◀ Back

<b>Basic Information</b>	
Title: <input type="text" value="Content For CRM Manual"/> Assigned To: <input checked="" type="radio"/> Users <input type="radio"/> Group Customer: <input type="text" value="Lori Griner"/> Status: <input checked="" type="radio"/> Active <input type="radio"/> Inactive	
<b>File Details</b>	
Upload Document: <input type="button" value="Choose File"/> EZNet CR...ual.pdf	
<b>Description</b>	
Description: <div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div>	

*Note: Only the following file types are supported in an eZnet CRM document. PDF, doc, docx, ppt, pptx, xls,xlsx, rtf and txt.*

Manage Document Q Search

Title	Description	Download	Created On	Status	Action
Blog Post	Blog Post for July Campaign	<span style="color: green;">Download</span>	December 1, 2014, 17:32:58	<span style="color: green;">Active</span>	<span style="color: red;">Q</span> <span style="color: green;">F</span> <span style="color: red;">X</span> Send Document
Bucket Test	Testing Document Library	<span style="color: green;">Download</span>	November 25, 2014, 09:58:07	<span style="color: green;">Active</span>	<span style="color: red;">Q</span> <span style="color: green;">F</span> <span style="color: red;">X</span> Send Document
Content for CRM Manual	Content for CRM Manual	<span style="color: green;">Download</span>	November 13, 2014, 10:38:33	<span style="color: red;">InActive</span>	<span style="color: red;">Q</span> <span style="color: green;">F</span> <span style="color: red;">X</span> Send Document

Total Record(s): 3 Page(s): 1 Search

These documents, whether **ACTIVE** or **INACTIVE**, can be downloaded at any time for offline or future use and sent as an email to recipients outside of the system.

## Add Documents to Lead

From Dashboard: Lead > Click Lead Name > Document > Add Lead Document

Manage Lead > Document Details Edit Back X

Lead [3]: Jane ply Jane ply

							<span style="color: red;">+ Add Lead Document</span>
Document ID	Title	Description	Download	Created On	Status	Action	
2	Bucket Test	Testing Document Library	<span style="color: green;">Download</span>	November 25, 2014, 09:58:07	<span style="color: green;">Active</span>	<span style="color: red;">X</span>	

Total Record(s): 1 Page(s): 1 Created By: Administrator on November 20, 2014

- Lead Details
- Schedule Event
- Campaign
- Comment
- Convert Lead
- Document

## Add Documents to Opportunity

*From Dashboard: Opportunity > Click Opportunity Name > Document > Add Opportunity Document*

Manage Opportunity > View Document Details

Opportunity [4]: Opportunity Testing Info

Document has been added successfully

+ Add Opportunity Document

Document ID	Title	Description	Download	Created On	Status	Action
8	Solution Spreadsheet		<a href="#">Download</a>	December 12, 2014, 11:44:23	Active	X

Total Record(s): 1 Page(s): 1

Opportunity Testing Info

- Opportunity Details
- Lead
- Ticket
- Campaign
- Comments
- Document
- Schedule Event

## Add Documents to Ticket

*From Dashboard: Tickets > Click Ticket Name > Document > Add Ticket Document*

View Ticket > Document

Ticket [3]: Customer Request

Document has been added successfully

+ Add Ticket Document

Document ID	Title	Description	Download	Created On	Status	Action
9	Customer Receipts		<a href="#">Download</a>	December 12, 2014, 12:39:58	Active	X

Total Record(s): 1 Page(s): 1

## Add Documents to Quotes

*From Dashboard: Quotes > View Quotes > Document > Add Quote Document*

Manage Quote > Document Detail

Document has been added successfully

+ Add Quote Document

Document ID	Title	Description	Download	Created On	Status	Action
10	Testing Info		<a href="#">Download</a>	December 12, 2014, 12:53:27	Active	X

Total Record(s): 1 Page(s): 1

Testing Info

- Quote Details
- Ticket
- Campaign
- Document
- Schedule Event

## Add Documents to Campaign

*From Dashboard: Campaign > View Campaign > Document > Add Campaign Document*

Manage Campaign » Document Details

Document has been added successfully

[+ Add Campaign Document](#)

Document ID	Title	Description	Download	Created On	Status	Action
12	January Plans		<a href="#">Download</a>	December 12, 2014, 13:04:03	Active	X

Total Record(s): 1 Page(s): 1

Campaign [1]: July Lead Campaign

- Campaign Detail
- Document

Created By : Administrator on August 13, 2014

## Add Documents to Event/ Task

*From Dashboard: Calendar > Click Event/Task Name > Document > Add Activity Document  
or*

*From Dashboard: Calendar > Manage Event/Task > View Event/Task > Document > Add Document*

Main Menu

Manage Activity » Document

Activity [10]: event

[+ Add Activity Document](#)

Document ID	Title	Description	Download	Created On	Status	Action
No record found.						

Total Record(s): 0

Activity Details

Comments

Document

## Customer Documents

All Documents assigned to a specific customer can be viewed in their respective Customer records. To view the documents for a customer; *from the dashboard: Customer > View Customer > Documents*.

Manage Customer » Documents

Lori Griner

Title	Description	Download	Created On
January Plans		<a href="#">Download</a>	December 12, 2014, 13:04:03
Testing Info		<a href="#">Download</a>	December 12, 2014, 12:53:27
Customer Receipts		<a href="#">Download</a>	December 12, 2014, 12:39:58
Solution Spreadsheet		<a href="#">Download</a>	December 12, 2014, 11:44:23
Content for CRM Manual		<a href="#">Download</a>	December 12, 2014, 10:46:19
Bucket Test	Testing Document Library	<a href="#">Download</a>	November 25, 2014, 09:58:07

- General Information
- Contacts
- Bank Details
- Billing Address
- Shipping Address
- Comments
- Tickets
- Event / Task
- Documents
- Quotes
- Sales Orders
- Invoices

## Templates

*Note: This function is only available for Administrators.*

You can create personal alerts for CRM activities of your choice. This function is found in the SETTINGS module of the CRM.

**From Dashboard: Settings > Email Template**

The screenshot shows the 'Email Template' configuration page. On the left is a sidebar with various settings categories: Main Menu, Manage Group, Lead Source, Ticket Category, Sales Stage, Lead Industry, Campaign Type, Expected Response, **Email Template** (which is selected and highlighted in red), Activity Status, and Activity Type. The main area is titled 'Email Template' and shows the following details:

- Email Template Category:** Lead Assign
- Subject:** New Lead has been Assigned to You
- Available Fields:** LEAD ID, FIRST NAME, LAST NAME, PRIMARY EMAIL, ASSIGNED TO, COMPANY, WEBSITE, TITLE, PRODUCT, PRODUCT PRICE, ANNUAL REVENUE, LEAD SOURCE, NUMBER OF EMPLOYEES, LEAD STATUS, LEAD DATE, LAST CONTACT DATE, DESCRIPTION.
- Email Template Content:** A rich-text editor window containing the following text:

New Lead has been assigned to you on [SITENAME].  
Please see below Lead details:

Primary Email : [PRIMARYEMAIL]  
First Name : [FIRSTNAME]  
Last Name : [LASTNAME]  
Lead Amount : [LEADAMOUNT]  
[PRODUCT]  
[COMPANY]

This is a test footer
- Note:** [SITENAME] and [FOOTER\_MESSAGE] are global parameters.
- Status:** Active (radio button selected)
- Buttons:** Update (red button) and Cancel.

Personalizing your email template allows you to keep current with activities as it pertains to you and the entire system. If your user account is assigned a ticket, lead, quote or opportunity, based on the email template you personalized, you will receive alerts for these actions. You may change the formatting, change sequences, and add or remove fields including the footer message.

eZnet CRM will automatically send an email providing the information you created. On the other hand, if you want to receive alerts for new ticket, lead, quote or opportunity,(regardless of the assignee) you can create those alerts as well, and keep track of all activities in CRM.

# Inventory Management

## Item Master

Manage your inventory with the **Item Master**. This menu of eZnet CRM helps you to list products and services that your company offers.

### Add Products

You can create individual products by: entering data in the **Add Item** form or Importing data from the CRM template.

*Note: Each item added to the **Item Master** List MUST have a unique SKU.*

### Add New Item

**From Dashboard: Item Master > Add New Item**

Input your entire inventory manually by providing the necessary information by selecting the Add Item button.

*Note: eZnet CRM does not allow duplicate SKUs.*

The screenshot shows the 'Edit Item' form in eZnet CRM. The form has the following fields:

- SKU:** 2323123
- Item Name:** Processor Upgrade
- Price:** 15000.00 USD
- Qty on Hand:** 1
- Status:** Active (radio button selected)
- Description:** This is a high quality processor
- Item Image:** A thumbnail image of a processor chip is displayed, with a 'Choose File' button and 'No file chosen' text below it.

At the bottom right of the form is a red 'Update' button.

### Import Item

**From Dashboard: More > Item Master > Import Item > Download Template**

Import inventory to CRM with an Excel spreadsheet, however the file must be the same template given by eZnet CRM as an .xls file.

*To see instructions on how to Import a spreadsheet into CRM, see Data Administration on page 16.*

Input the necessary information indicated by an asterisk in the Excel template given by the CRM and import. This action should populate the list. By default, an **ACTIVE** status applies to newly uploaded items. If you do not intend on using items on the Inventory List for quotes, change status to **INACTIVE**.

*To see instructions on how to change Statuses, see Basics of eZnet CRM on page 3 for instructions.*

## **Export Item List**

To extract the **Item List**, there is an option to export to an Excel spreadsheet available for offline use. For multiple modifications, you may also edit the information on the spreadsheet and re-upload it to the **Item List**.

*See Data Administration for Import and Export details.*

# Customer Support

## Ticket

The **Ticket** function streamlines organization-wide Customer Support processes by integrating Sales & Customer Support in a single system. Integration between sales and post-sales support management helps organizations resolve the customer reported cases in the least possible time, enhancing customer satisfaction and allowing for more cross-selling and up-selling opportunities in the future.

A ticket is an issue or task associated with a customer assigned to an individual or group. Tickets can be prioritized and categorized based on its importance and urgency. **Tickets** can only be created under the **Customer** and **Opportunity** modules, and can only be edited and assigned to another individual after it has been created.

## Create a Ticket

*From Dashboard : Ticket > Add A Ticket*

eZnet CRM allows you to keep track of your customers and best fulfill their individual needs. Creating a ticket, allows you to list products and services available for each customer. Each ticket must be assigned to an individual or group.

*Example: Susie works in the Accounts Department, a customer requests a copy of receipt of a recent purchase. A customer service representative creates a ticket, and assigns Susie, who receives a notification via email.*

The screenshot shows the 'Manage Ticket > Add Ticket' interface. The main title is 'Ticket Information'. The 'Title' field contains 'Customer Request'. The 'Assigned To' section shows 'Users' selected, with 'test login' listed. The 'Ticket Status' is 'Open', 'Ticket Category' is 'Small Problem', 'Priority' is 'Low', and 'Days' is empty. The 'Customer' is 'Lori Griner'. In the 'Description Details' section, the 'Description' is 'Customer Request receipt for all 90 day transactions'. In the 'Ticket Resolution' section, the 'Solution' is 'Receipts may be faxed or emailed.' A red 'Submit' button is at the bottom right.

*Note: Until the administrator or the person assigned a ticket has resolved the issue, the ticket will remain in the queue until it is closed or deleted.*

After the fields indicated by an asterisk are filled, a unique ticket number is automatically generated and the screen below is displayed.

Title	Assign To	Status	Created On	Action
Customer Request	test login	Open	November 26, 2014	 Comments

## Edit Ticket

*From Dashboard: Ticket > Click Ticket Title > Edit Ticket*

There is always an option to edit an existing ticket. You may:

- a. Assign supplementary employees or groups
- b. Delete current employees on the Ticket
- c. Upgrade Ticket priority
- d. Update Ticket category
- e. Change Ticket status
- f. Edit/Change Ticket description details
- g. Edit Ticket Resolution

## Ticket Details

Manage Ticket > Edit Information Details

**Ticket Information**

Title: * <input type="text" value="Contact Customer about testing"/>	Assigned To: <input checked="" type="radio"/> Users <input type="radio"/> Group	Lead Stars	Priority: * <input type="text" value="High"/>
Ticket Status: * <input type="text" value="Open"/>	Ticket Category: * <input type="text" value="Medium Alert"/>	Days: <input type="text" value="0"/>	Customer: <input type="text" value="Lori Griner"/>
Hours: <input type="text" value="2"/>	<input type="button" value="Update"/>		

## Ticket Description Details

Manage Ticket > Edit Description Details

**Description Details**

Description: * <input type="text" value="Customer request copies of recent transaction "/>	<input type="button" value="Update"/>
--	---------------------------------------

## Ticket Resolution Details

Main Menu

Manage Ticket

Manage Ticket > Edit Resolution Details

Ticket Resolution

Solution: Receipts may be faxed or emailed.

Update

Customer Request

- Edit Information
- Edit Description
- Edit Resolution

## Standard Fields

Manage Ticket > Add Ticket

Ticket Information

Title:

Assigned To:  Users  Group

Ticket Status:

Ticket Category:

Hours:

Priority:

Days:

Customer:

Description Details

Description:

Ticket Resolution

Solution:

Submit

Once the Ticket information is configured, users can view the support tickets under the Opportunity, Quotes and Customer.

# Sales Automation

eZnet CRM offers your sales team and executives a variety of sales management assessments. These assessments include: lead qualification and generation, sales pipeline, probability analysis, competitor analysis, sales forecasting and other metrics. These different reports make opportunities allows your business to focus on a customer's life-cycle and increase sales revenue.

You can use eZnet CRM sales automation modules and options like:

- Leads
- Customers
- Contacts
- Quotes
- Opportunity
- Sales Forecast (Probability)
- Opportunity Tracking
- Closing

## **Leads**

Leads are the details about individuals or representatives of organizations. They play a very important role in an organization's Sales & Marketing department and are useful in identifying potential customers. Leads can be obtained through trade shows, seminars, advertisements, marketing campaigns etc.

### **Import lead**

To import leads, the .xls file must be the same template given by eZnet CRM.

To populate your leads download the template (Import Lead > Download Template) and import the .xls file.

### ***From Dashboard: Lead > Import Lead***

Align the drop-down module headers based on the details that you input on the Excel template spreadsheet.

*Refer to Data Administration for more about Importing and Exporting.*

## Add Lead

You may also add a lead manually by inputting the necessary information indicated by an asterisk.  
*Note: A lead can be assigned to multiple users.*

The screenshot shows the 'Add Lead' page with various input fields. The 'Lead Details' section contains fields for Lead Type, First Name, Primary Email, Product, Website, Annual Revenue (USD), Lead Source, Lead Status, Company Name, Last Name, Title, Product Price (USD), Industry, Number of Employees, Assigned To, and Lead Date. The 'Address Details' section contains fields for Street Address, Country, State, Other State, Other City, Zip Code, Landline, and Mobile. The 'Description' section contains a rich text editor.

*Note: Quick Entry is used to enter customer information, but has limited display.*

The screenshot shows a modal dialog titled 'Add Lead'. It contains a 'Lead Details' section with fields for Lead Type, First Name, Primary Email, Lead Status, Company Name, Last Name, Lead Source, Street Address, and Mobile. A 'Submit' button is located at the bottom right of the dialog.

## Convert Leads

When a lead has agreed to continue business with your organization, eZnet CRM allows you to convert a lead into an opportunity. You will be given the option to name the opportunity, input an Expected Close Date/Time, select the sales stage and assign the potential customer to an employee or department. With the information that you have provided in the CRM, you may use filters to search for a certain customers with various attributes.

**Lead > Click Lead Name > Convert Lead**

*Note: When converting a lead into an opportunity, the contact deletes from the lead list.*

**Lead Details**

- Lead Type:
- First Name:
- Primary Email:
- Product:
- Website:
- Annual Revenue (USD):
- Lead Source:
- Lead Status:
- Company Name:
- Last Name:
- Title:
- Product Price (USD):
- Industry:
- Number of Employees:
- Assigned To:
- Lead Date:
- Last Contact Date:

**Address Details**

- Street Address:
- Country:
- State:
- Other State:
- Other City:
- Zip Code:
- Landline:
- Mobile:

**Description**

Description:

## Create Lead Reports

eZnet CRM generates a lead report from information previously added to the system. To access this report, select the **REPORT** module item and choose from the options given in the drop down columns.

**From Dashboard : Report > Lead Report**

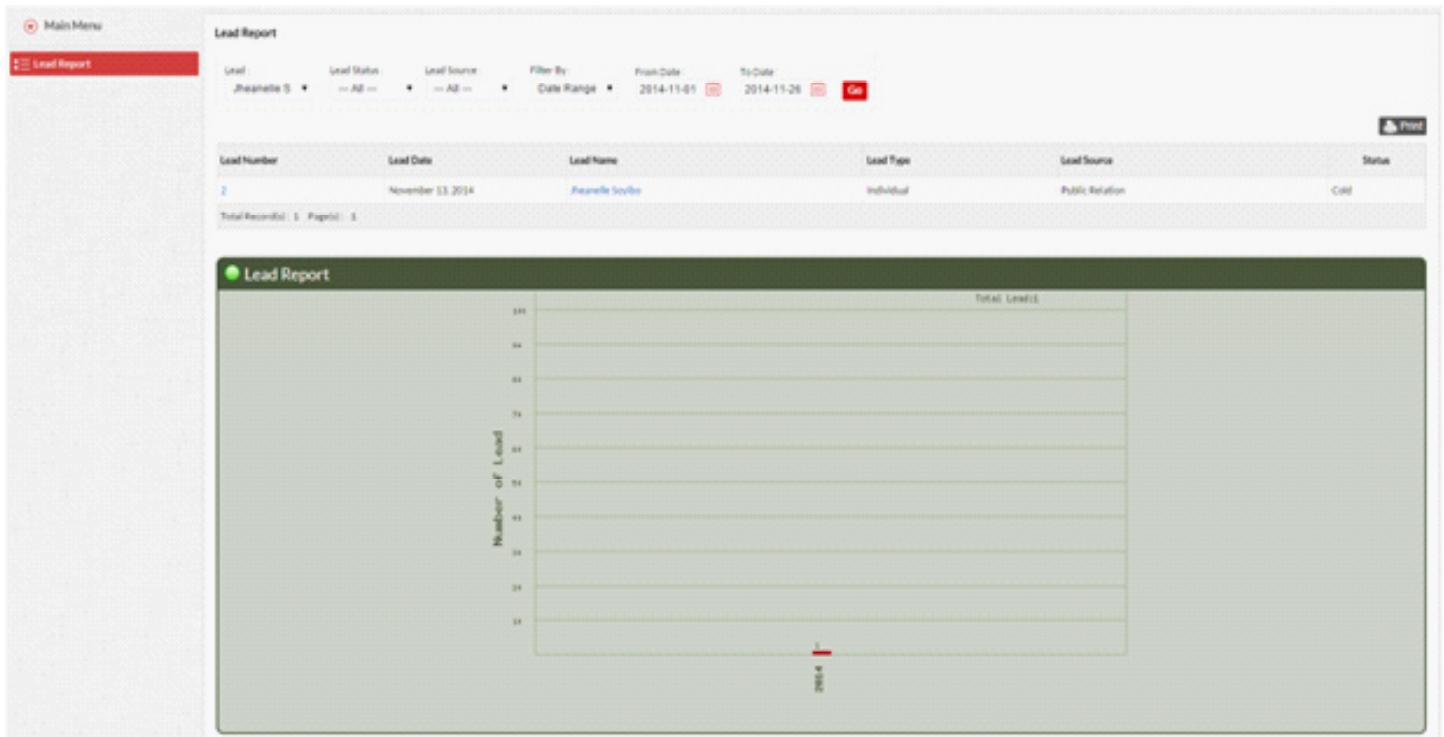
**Lead Report**

Lead: <input type="button" value="Jheanelle S"/>	Lead Status: <input type="button" value="-- All --"/>	Lead Source: <input type="button" value="-- All --"/>	Filter By: <input type="button" value="Date Range"/>	From Date: <input type="text" value="2014-11-01"/> <input type="button" value=""/>	To Date: <input type="text" value="2014-11-26"/> <input type="button" value=""/>	<input type="button" value="Go"/>
--	---	---	--	--	--	-----------------------------------

*Note: Dates are mandatory to generate the lead report.*

If the criteria for the report was accurate, a report generates, based on the input of the user. The following photo demonstrates an example of a report.

Select the Columns and details that you would like to include in the report , including Name, Lead Status and Lead Source. You can choose a time frame Filter either by Year or Date Range.



Conversely, if the criterion was inaccurate or without data, a report will not generate.



Instead, the screen displays “**No Record Found**” as seen below. To correct this issue, adjust the various criteria until graph is shown with the desired results.

## Create Lead Form

You can acquire leads through various activities including web forms. eZnet CRM provides you the option to generate a web lead form to collect information on your website or wherever you choose.

## From Dashboard: Lead > Create Lead Form

The screenshot shows the 'Create Lead Form' page. On the left, there's a 'Main Menu' with 'Manage Lead' and 'Create Lead Form' options. The 'Create Lead Form' option is highlighted with a red background. The main area has two columns: 'Available Fields' on the left and 'Lead Form Fields' on the right. A central transfer area contains arrows pointing from left to right. Below this is a form section with fields for 'Form Title' (Exnet Web), 'SubTitle' (Devious), and 'Description' (Testing the Web To lead Form). At the bottom is a 'Submit' button.

**» »** - transfers all the Available fields

**»** - transfers selected field/s

Use the arrows in the middle of the screen to populate the Lead Form fields the right on as displayed. When you have chosen the fields you want to display in your contact form, include a Form Title, Subtitle and/or a Description.

To view the HTML code, choose the option and a code will generate as seen in the photo below. The code can only be edited after being copied and placed on your site.

The screenshot shows a modal window titled 'Web to Lead HTML Code for [Cynthia]'. It contains a large block of generated JavaScript code. The code includes imports for CSS and JavaScript files, and defines a function 'validateWebToLeadForm' that checks various form fields for validation rules like non-blank fields and email formats.

```

<link href="http://app01.eznetcrm.com/erp/css/admin.css" rel="stylesheet" type="text/css">
<script language="javascript" src="http://app01.eznetcrm.com/erp/includes/global.js"></script>

<script language="JavaScript1.2" type="text/javascript">
function validateWebToLeadForm(frm) {
    if(document.getElementById("firstName") != null) {
        if(!ValidateForSimpleBlank(frm.firstName, "First Name")){
            return false;
        }
    }
    if(document.getElementById("lastName") != null) {
        if(!ValidateForSimpleBlank(frm.lastName, "Last Name")){
            return false;
        }
    }
    if(document.getElementById("primary_email") != null) {
        if(!isEmailOpt(frm.primary_email)){
            return false;
        }
    }
    if(document.getElementById("lead_source") != null) {
        if(!ValidateForSelect(frm.lead_source, "Lead Source")){
            return false;
        }
    }
    if(document.getElementById("lead_status") != null) {
        if(!ValidateForSelect(frm.lead_status, "Lead Status")){
            return false;
        }
    }
}

```

The example below illustrates the preview mode of the Lead Form. It shows exactly how it would appear on your site and includes all the fields that you chose.

A screenshot of a web browser showing a lead form. The title bar says "Web to Lead Form for [Cynthia]". The form has fields for First Name, Last Name, Company Name, Title, Product Price, and Annual Revenue [USD]. A red "Submit" button is at the bottom. On the left, there's a sidebar titled "Available Fields" with a list of fields like Company, Title, Product, etc. At the bottom, there's a "Description" field containing "Testing the Web to lead Form".

To complete an additional Lead Form, select “Back to Create Lead Form” highlighted in blue under the

*Note : To highlight multiple fields using your keyboard, press shift+click.*

## **Customer**

Customers are people with whom you are presently conducting business. In the **Customer** module, you can view/edit information such as Bank Details, Billing and Shipping Address, Tickets, Event/Task, Documents, Quotes, Sales Orders, Invoices and the Salesperson. You may also add Social Information including Facebook, LinkedIn and Twitter accounts to connect with customers through these platforms..

By default, customers are not allowed to view their current information on file, however, the administrator may grant access to view their file. They are able to see their invoices, pending sales order, change and edit payment methods and include their social media informations.

### **Add Customer**

You may also add a customer manually by inputting the necessary information in the standard fields, indicated by an asterisk.

#### **From Dashboard: Lead > Add Customer**

After entering information for the customer, a customer code generates and that file is ready for use in all modules.

## Standard Fields

Manage Contact » Add Contact

Basic Information

First Name: <input type="text"/>	Last Name: <input type="text"/>
Email: <input type="text"/>	Personal Email: <input type="text"/>
Title: <input type="text"/>	Department: <input type="text"/>
Lead Source: <input type="text"/> ... Select ...	Assigned To: <input type="text"/> ... Select ...
Reference: <input type="checkbox"/>	Do Not Call: <input type="checkbox"/>
Notify Owner: <input type="checkbox"/>	Email Opt Out: <input type="checkbox"/>
Customer: <input type="text"/> ... Select ...	Status: <input checked="" type="radio"/> Active <input type="radio"/> InActive

Address Details

Address: <input type="text"/>
Country: <input type="text"/> United States
State: <input type="text"/> ... Select State ...
Other State: <input type="text"/>
Other City: <input type="text"/>
Zip Code: <input type="text"/>
Mobile: <input type="text"/>
Landline: <input type="text"/>

Description Details

Description: <input type="text"/>
-----------------------------------

## Import Customer

You can either import from an .xls file, however the file must be the same template given by eZnet CRM.

*From Dashboard: Customer > Import Customer > Download Template*

Manage Customer » Import Customer

Import Customer Sheet:  No file chosen

Import sheet must be in.xls format and should be same as template downloaded from above "Download Template" button.

To populate contacts, download the template (Import Contact > Download Template) and import the .xls file.

## Contacts

Contacts are individuals within the organization you are communicating with.

## Create Contact

To create a contact in eZnet CRM, manually input the basic information of the contact. You can choose to categorize them under a particular company and assign their file to another user.

## From Dashboard: Contact > Add Contact

Manage Contact > Add Contact

**Basic Information**

First Name : <input type="text"/>	Last Name : <input type="text"/>
Email : <input type="text"/>	Personal Email : <input type="text"/>
Title : <input type="text"/>	Department : <input type="text"/>
Lead Source : <input type="text"/> --- Select ---	Assigned To : <input type="text"/> --- Select ---
Reference : <input type="checkbox"/>	Do Not Call : <input type="checkbox"/>
Notify Owner : <input type="checkbox"/>	Email Opt Out : <input type="checkbox"/>
Customer : <input type="text"/> --- Select ---	Status : <input checked="" type="radio"/> Active <input type="radio"/> InActive

**Address Details**

Address : <input type="text"/>
Country : <input type="text"/> United States
State : <input type="text"/> --- Select State ---
Other State : <input type="text"/>
Other City : <input type="text"/>
Zip Code : <input type="text"/>
Mobile : <input type="text"/>
Landline : <input type="text"/>

**Description Details**

Description : <input type="text"/>
------------------------------------

**Submit**

## Contact List

Organize contacts in a single file by exporting the list into a single Excel spreadsheet.

Manage Contact						
						 Add Contact  Print  Export To Excel
First Name	Last Name	Email	Title	Assign To	Status	Action
Dwight	Ducatti	dwight@ducatti.com	Not specified.	Not assigned.	 Active	 
Polly	Dee	testing3@virtualstacks.com	Manager	Jheanelle Soyibo	 Active	 

Total Record(s) : 2 Page(s) : 1

## Quotes

Quotes are estimates requested by the potential customer based on the cost of the items in the inventory.

### Create Quotes

Effectively track and manage quotes for customers by creating a quote in eZnet CRM. However, you must ensure there are items listed and priced in the **ITEM MASTER**. To generate accurate quotes once or on a recurring basis, input the required fields indicated by \* asterisks.

<b>Quote Information</b>	
Entry Type : One Time	Opportunity : Generator Miami
Subject : Complete	Valid Till : November 26, 2014
Quote Stage : Created	Shipping : Not specified.
Carrier : Not specified.	
Assign To : Jheanelle Soyibo,	
Notes : Not specified.	
<b>Billing Address</b>	
<b>Shipping Address</b>	
Billing Address : 123 Whisper Lane	Shipping Address : 123 Whisper Lane
Billing City : St Ann's Bay	Shipping City : St Ann's Bay
Billing State : St. Ann	Shipping State : St. Ann
Billing Country : Jamaica	Shipping Country : Jamaica
Billing Postal Code : 0000-000	Shipping Postal Code : 0000-000
	Taxable : Yes
	Tax Rate : None

*Note: Taxable option based on geographic location of billing address.*

After completing the mandatory fields, quotes generated in eZnet CRM will remain until deleted. You also have the option to modify, download and print the details of the quote.

In the event that a customer requests a copy of the quote, you may send the details and other related documents via email by selecting the “Send Quote” feature displayed in the photo below.

## Manage Quotes

[View All](#) [!\[\]\(7d2c5f9e82a618e76a637ab66cb71793\_img.jpg\) Print](#) [!\[\]\(bf4030c24b2dfccadadf6b25a43fa4d5\_img.jpg\) Export To Excel](#) [!\[\]\(e830de38bd2f1089b4c6df0c68b95f4a\_img.jpg\) Add Quote](#)

Subject	Quote Stage	Valid Till	Total [USD]	Created Date	Action
Complete	Created	November 26, 2014	15149.99	November 14, 2014	 Send Quote

Once you have clicked “Send Quote”, the screen below should appear.

**Manage Quotes**

		<a href="#">View All</a>	<a href="#">Print</a>	<a href="#">Export To Excel</a>	<a href="#">+ Add Quote</a>
Subject	<b>Send Quote</b>				
Completed	<b>Quote Information</b> Quote Number #: 1 Subject: Complete Quote Date: November 14, 2014				
Website Creation	<b>Send Email</b> To: <input type="text" value="jane.ply@froth.com"/> CC: <input type="text"/> Attach Document: <input type="button" value="Choose File"/> No file chosen Message: <div style="border: 1px solid #ccc; height: 100px; margin-top: 10px;"></div>				
Total Record(s): 2 Page(s): 1	Action  <a href="#">Send Quote</a>  <a href="#">Send Quote</a>				
	<input type="button" value="Send"/>				

Copyright © Cloud-based ERP System. All Rights Reserved.

Fill the necessary information including additional documents such as photos and other files you wish to send.

Emails can be sent to a customer already listed in CRM and may be carbon copied (cc) to recipients outside of the CRM system.

### Manage Quotes

Sale quote has been send to customer successfully.

[View All](#) [Print](#) [Export To Excel](#) [+ Add Quote](#)

Subject	Quote Stage	Valid Till	Total [USD]	Created Date	Action
Complete	Created	November 26, 2014	15149.99	November 14, 2014	Send Quote
Website Creation	Created		199901.00	December 18, 2014	Send Quote

Total Record(s): 2 Page(s): 1

### Cancel or Edit Recurring Quotes

You may cancel or modify any recurring quotes in the main menu of the **Quotes** module.

*From Dashboard: Quotes> Recurring Quotes*

When you have arrived at the **RECURRING QUOTES** menu, the list below shows all the quotes that you have chosen as a recurring entry in the **Calendar**.



Main Menu

Manage Quotes

Recurring Quotes

Recurring Quotes							
Customer Name	Amount [USD]	Interval	Entry Date	Every	Entry From	Entry To	Action
Hair of the dog	0.00	Monthly	18		December 18, 2014	December 18, 2015	

Total Record(s): 1 Page(s): 1

Select an action Icon to edit and the screen below will appear.



Recurring Quotes

Customer Name	Amount [USD]	Interval	Entry Date	Every	Entry From	Entry To
Hair of the dog	0.00	Monthly	18		December 18, 2014	December 18, 2015

Total Record(s): 1 Page(s): 1

Recurring Quotes > Edit Recurring Quote

Entry Type: Recurring Interval: Monthly

Entry From: 2014-12-18 Entry To: 2015-12-18

**Update**

This screen will only allow you to edit **Entry Type**, **Interval** and Start /Stop dates.

To cancel the Quotes that are listed, select the red x, and a notice should appear, as shown below.



If your deletion is successful, you will see a notice below highlighted in red.

Quote recurring has been cancelled successfully.

## Opportunity

Opportunities are organizations or individuals that have the potential to continue business with your company.

### Create Opportunities

You may create a new opportunity in eZnet CRM using the mandatory fields indicated by an asterisk.

*Note: Adding a new opportunity does not provide address and phone number entries.*

### From Dashboard: CRM > Opportunity > Add Opportunity

Converting a lead into an opportunity, the information for the customer will populate the necessary fields.

Manage Opportunity » Add Opportunity

[Back](#)

A screenshot of the 'Add Opportunity' form. The form is divided into sections: 'Opportunity Details' and 'Description'.  
**Opportunity Details:**  
Fields include: Opportunity Name (mandatory), Organization Name, Amount (USD), Expected Close Date (with Close Date and Close Time buttons), Sales Stage (dropdown), Assigned To (dropdown), Customer (dropdown), Lead Source (dropdown), Next Step (text input), Opportunity Type (dropdown), Probability (%), Forecast Amount (USD), Campaign Source (text input), Website (text input), Contact Name (text input), and Status (radio buttons for Active and InActive).  
**Description:**  
A rich text editor with a toolbar containing icons for Source, Bold, Italic, Underline, and various other formatting options. A large text area for the description is below the toolbar.

## Probability

Within the **Opportunity** module, the Probability field is optional, but a pivotal in tracking Sales Forecasts. In CRM, Probability is the likelihood of an Opportunity converting to a Customer. This percentage is strictly at the discretion of the user and may be utilized as a gauge for Executives, Sales and Marketing personnel.

A screenshot of a CRM application's interface. At the top, there is a header bar with the title 'Probability (%)' followed by a large input field containing the value '50'. Below this, there is a light gray background area with some faint text or other interface elements.

To generate a probability-based Sales Forecast Report, you will have to sort the current list of Opportunities using the Filter tool. *See Customization.* You can add Probability as a column or a rule for the report.

A screenshot of the 'Manage Opportunity' screen in a CRM application. On the left, there is a sidebar with 'Main Menu' and 'Manage Opportunity' buttons. The main area has a 'Details' section with a 'View Name' dropdown set to 'Sales Forecast November', and checkboxes for 'Set as Default' and 'Set as Public'. Below this is a 'Choose Columns' section with columns for 'Opportunity ID', 'Amount', 'Assigned To', 'Website', and 'Opportunity Name'. At the bottom, there is a 'RULE' section where a rule for 'Probability (%)' is defined: 'Greater than 20'. There are four rows for this rule, each with a 'None' option selected. At the bottom right of the screen are 'Save' and 'Cancel' buttons.

*Note: CRM does not allow duplicate columns or rules.*

After the correct columns and rules are selected, a report similar to the one below is generated.

A screenshot of the 'Manage Opportunity' screen in a CRM application, showing a generated report table. The table has columns: 'Opportunity ID', 'Amount', 'Assigned To', 'Website', 'Probability (%)', and 'Action'. There are three rows of data:

Opportunity ID	Amount	Assigned To	Website	Probability (%)	Action
4	65000	Nell Lightyear,	www.testingtest.com	50	
3	Not specified.	Janelle Soylbo,	Not specified.	90	
1	10000	Nell Lightyear,	Not specified.	85	

Total Record(s) : 3 Page(s) : 1

## Opportunity Tracking

Within the Opportunity module, the Expected Close Date field is mandatory and pivotal in tracking Opportunities in CRM. The designee of the Opportunity is alerted near to their Expected Close Date, to help organize their priorities and close more deals.

The screenshot shows a form field for 'Expected Close Date' with a required asterisk (\*). The input field contains the date '2014-11-26' and the time '04:30:00'. To the right of the input field are two small buttons: a calendar icon labeled 'Close Date' and a clock/timer icon labeled 'Close Time'.

## Closing

Within the Opportunity module, the Sales Stage field is mandatory and is pivotal in tracking Opportunities. Options available in the Sales Stage are based on the criteria set by the full-access Administrator or user with permission.

The screenshot shows a form field for 'Sales Stage' with a required asterisk (\*). The dropdown menu is open, showing the option 'Closed Won' selected.

*Some of the most popular options are: Prospecting, Close Won, Negotiating, Reviewing, Closed Lost.*

This option depends on whether or not the potential customer wants to continue conducting business with your company.

## Standard Fields

The screenshot displays the 'Opportunity Details' and 'Description' sections of the CRM interface. In the 'Opportunity Details' section, there are various input fields: 'Opportunity Name', 'Organization Name', 'Amount (USD)', 'Expected Close Date' (with 'Close Date' and 'Close Time' buttons), 'Sales Stage' (dropdown), 'Customer' (dropdown), 'Next Step', 'Probability (%)', 'Forecast Amount (USD)', 'Campaign Source', 'Contact Name', and a 'Status' radio button group ('Active' and 'InActive'). In the 'Description' section, there is a rich text editor with a toolbar containing icons for Source, Bold, Italic, Underline, etc., and a large text area for entering the description. A red 'Submit' button is located at the bottom of the form.

# Marketing Automation

As part of the marketing automation, eZnet CRM provides Campaign management, which is useful for integrating your organization's sales and marketing activities.

With eZnet CRM campaign management features, you can effectively plan marketing expenses and improve the quality of the lead generation process. Campaign management integrates leads and opportunities to help your organization measure campaign performance and effectiveness.

## Campaigns

Plan, execute and monitor the performance of marketing activities with the **CAMPAIGN** function in eZnet CRM.

### Create Campaign

Campaign is the promotion or marketing of the products and services that your business offers. Managing a Campaign in this module is the hub for adding campaigns for all modules, namely: **Lead**, **Quote** and **Opportunity**.

*From Dashboard: Campaign > Add Campaign*

### Add Campaign

Create a new **Campaign** in CRM using the given fields indicated by asterisks in the Standard Fields.

Manage Campaign > Edit Campaign Details ◀ Back

**Campaign Information**

Campaign Name: * July Lead Campaign	Assigned To: Neil Lightyear
Campaign Status: * Planning	Campaign Type: * Advertisement
Product: * Processor Upgrade [Sku: 232]	Target Audience:
Expected Close Date: * 2014-08-31	Target Size: * 10
Sponsor: Nike	Num Sent (%): * 54

**Expectations & Actuals**

Budget Cost: (USD): * 15000.00	Actual Cost: (USD): * 12021.00
Expected Response: Excellent	Expected Revenue: (USD): * 50000.00
Expected Sales Count: * 0	Actual Sales Count: 0
Expected Response Count: 0	Actual Response Count: * 60
Expected ROI: (USD): * 35000	Actual ROI: (USD): * 32000

**Description**

Description:

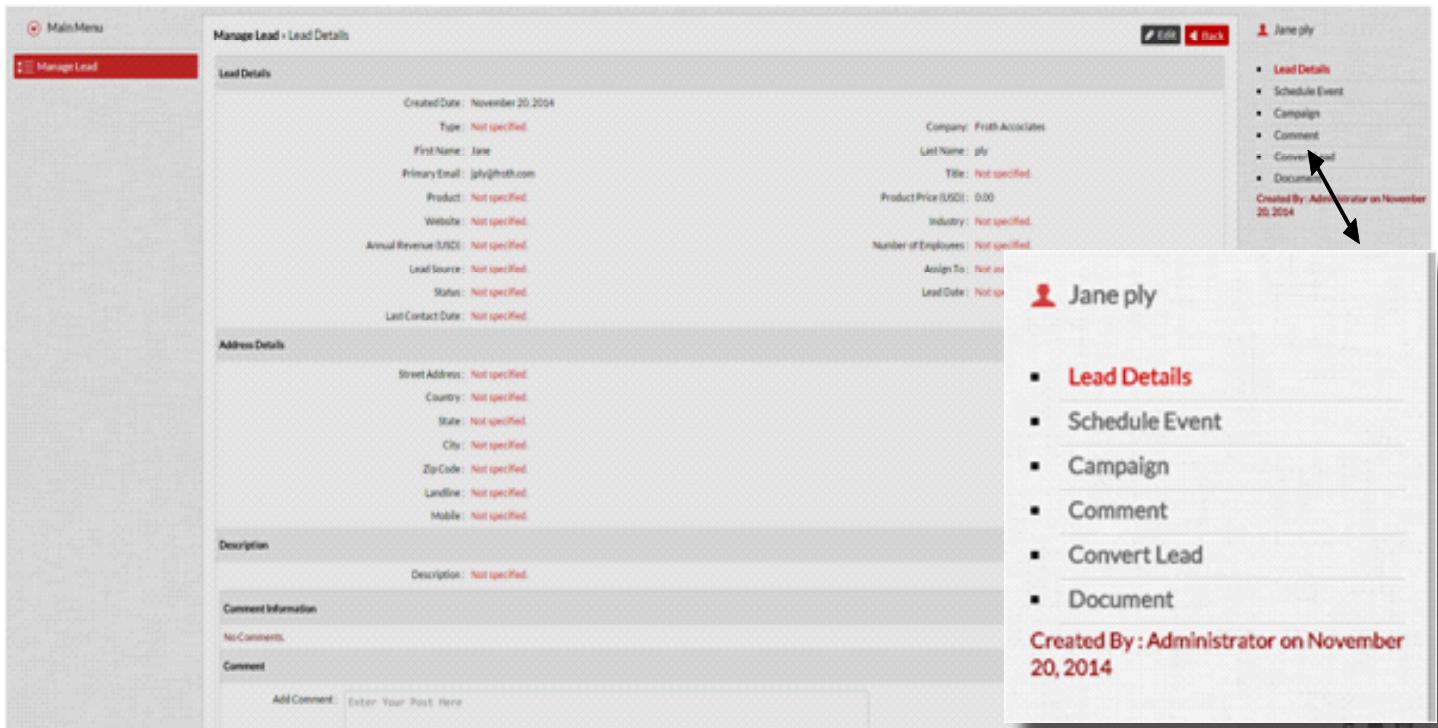
## Add Campaign to Lead, Quote & Opportunity

Launch a campaign targeting your existing **LEAD, QUOTE or OPPORTUNITY**, by following the instructions below.

Step 1: To add a campaign, select the **Lead, Quote or Opportunity** module and proceed to the Details page of each module.

### Lead : Add Campaign

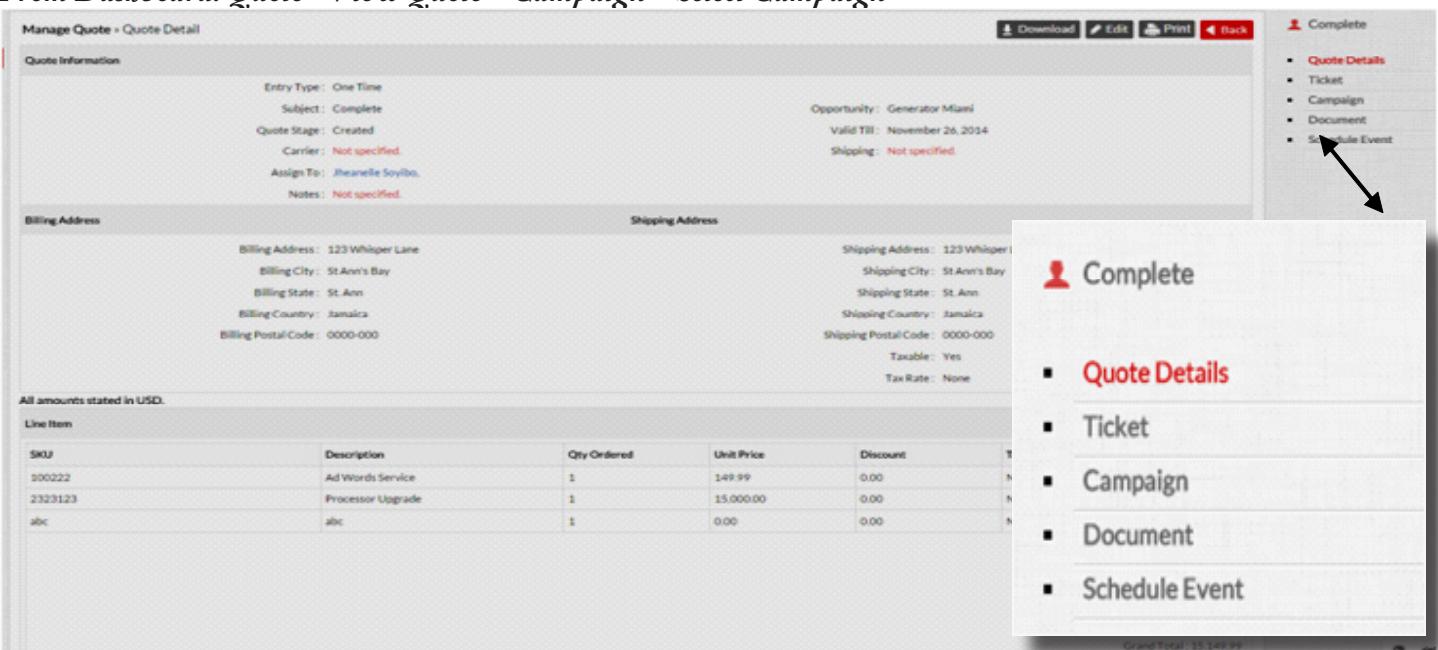
*From Dashboard: Lead > Select Lead Name > Campaign > Select Campaign*



The screenshot shows the 'Manage Lead > Lead Details' page. On the left, there's a navigation bar with 'Main Menu' and 'Manage Lead'. The main area has tabs for 'Lead Details', 'Address Details', 'Description', 'Comment Information', and 'Comment'. Under 'Lead Details', various fields like 'Created Date', 'Type', 'First Name', 'Primary Email', etc., are listed. On the right, there's a sidebar for 'Jane ply' with a list of actions: 'Lead Details', 'Schedule Event', 'Campaign', 'Comment', 'Convert Lead', and 'Document'. A note at the bottom says 'Created By: Administrator on November 20, 2014'. An arrow points from the 'Campaign' link in the sidebar to the 'Campaign' tab in the lead details section.

### Quotes : Add Campaign

*From Dashboard: Quote > View Quote > Campaign > Select Campaign*



The screenshot shows the 'Manage Quote > Quote Detail' page. On the left, there's a navigation bar with 'Download', 'Edit', 'Print', and 'Back'. The main area has tabs for 'Quote Information', 'Billing Address', 'Shipping Address', and 'Line Item'. Under 'Quote Information', fields like 'Entry Type', 'Subject', 'Quote Stage', 'Carrier', 'Assign To', and 'Notes' are listed. On the right, there's a sidebar for 'Complete' with a list of actions: 'Quote Details', 'Ticket', 'Campaign', 'Document', and 'Schedule Event'. A note at the bottom says 'Created By: Administrator on November 20, 2014'. An arrow points from the 'Campaign' link in the sidebar to the 'Campaign' tab in the quote details section.

## Opportunity : Add Campaign

From Dashboard: Opportunity > Select Opportunity Name > Campaign > Select Campaign

Manage Opportunity > View Opportunity Details

**Opportunity Details**

- Created Date: November 17, 2014
- Opportunity Name: Opportunity Testing Info
- Organization Name: CRM, Inc.
- Amount: 65000 USD
- Expected Close Date: November 26, 2014
- Sales Stage: Prospecting
- Assigned To: Janelle Sovbo
- Customer: Not specified
- Lead Source: Word of Mouth
- Next Step: Not specified
- Opportunity Type: New Business
- Probability (%): 50
- Campaign Source: Online Advertising
- Forecast Amount (USD): 32000
- Contact Name: German Testing
- Website: www.testingtest.com
- Status: Active

**Description**

Description: Under what circumstances, should we create an opportunity?

**Comment Information**

No Comments.

**Comment**

Add Comment: Enter Your Post Here

**Opportunity Testing Info**

- Opportunity Details
- Lead
- Ticket
- Campaign**
- Comments
- Document
- Schedule Event

To the right of the screen, there are subcategories shown in the photo above. The photo below is displayed after clicking the sub-category **Campaign**.

Main Menu

Manage Lead

Manage Lead - Campaign Details

Lead [3]: Jane ply

Campaign Name	Campaign Type	Campaign Status	Expected Revenue	Expected Close Date	Assign To	Action
No record found.						
Total Record(s) : 0						

Select Campaign

**Jane ply**

- Lead Details
- Schedule Event
- Campaign**
- Comment
- Convert Lead
- Document

Created By : Administrator on November 20, 2014

### NOTE

If you have NOT arrived at the screen displayed in the photo above, please revise the previous steps.

If you clicked **Select Campaign**, your CRM screen should be similar to the photo below.

The screenshot shows a CRM application window titled "Manage Opportunity - View Campaign Details". A sub-dialog box titled "Campaign" is open in the center. The dialog contains a table with one row, showing a campaign named "July Lead Campaign" with a type of "Advertisement". At the bottom of the dialog, it says "Total Record(s): 1 Page(s): 1". The main CRM window has a sidebar on the right labeled "Opportunity Testing Info" with a list including "Opportunity Details", "Lead", "Ticket", "Campaign", "Comments", "Document", and "Schedule Event".

Choose an existing campaign and apply it to your **Lead, Quote or Opportunity**.

*Note: Only previous added campaigns in the Campaign module are available for selection.*

When you have chosen the Campaign for a **Lead, Quote or Opportunity**, immediately it uploads to the respective modules, as seen below.

The screenshot shows a CRM application window titled "Manage Lead - Campaign Details". A lead record for "Jane ply" is displayed. In the "Action" column of the table, there is a red "X" icon. The sidebar on the right is titled "Jane ply" and includes a list of items: "Lead Details", "Schedule Event", "Campaign", "Comment", "Convert Lead", and "Document". A note at the bottom right states "Created By: Administrator on November 20, 2014".

## Campaign Documents

Any supplemental documents associated with a specific campaign can be uploaded in the Campaign module. On the right of the CRM screen you should notice a menu column as seen below:

The screenshot shows the 'Manage Campaign > Document Details' page. At the top right are 'Edit' and 'Back' buttons. To the right of the main content is a sidebar titled 'Campaign [1]: July Lead Campaign'. The sidebar has a tree view with 'Campaign Detail' and 'Document' nodes, and a note 'Created By: Administrator on August 13, 2014'. A red arrow points from the 'Document' node to the main content area. Below the sidebar, the main content area displays a table with columns: Document ID, Title, Description, Download, Created On, Status, and Action. A message 'No record found.' is displayed. At the bottom left, it says 'Total Record(s) : 0'. At the bottom right, there is another sidebar with the same 'Campaign [1]: July Lead Campaign' title and 'Created By: Administrator on August 13, 2014' note.

**From Dashboard: Campaign > View Campaign > Document**

Select “Document” and the screen above should appear, with the option to upload documents related to the chosen campaign.

In this next screen, you can name, assign, upload and add a description to the document you wish to upload.

The screenshot shows the 'Manage Campaign Document > Add Campaign Document' page. At the top right is a 'Back' button. The form is divided into sections: 'Basic Information' and 'File Details'. In 'Basic Information', fields include 'Title' (set to 'Blog Post'), 'Assigned To' (set to 'Users' with 'Neil Lightyear (Web Designer)' selected), 'Customer' (set to 'Lori Griner'), and 'Status' (set to 'Active'). In 'File Details', there is a 'Upload Document' field with 'Choose File' and '10 Reas... st.docx' options. In the 'Description' section, there is a rich text editor with a toolbar and a text area containing 'Blog Post for July Campaign'. At the bottom is a 'Submit' button.

If the upload is successful, you will receive a notice. A document ID will be created and you will have the option to download or delete the document. It is now stored and ready for use.

Document has been added successfully

 [Add Campaign Document](#)

Document ID	Title	Description	Download	Created On	Status	Action
6	Blog Post	Blog Post for July Campaign	<a href="#"> Download</a>	December 1, 2014, 17:32:58	Active	X

Total Record(s): 1 Page(s): 1

*Note: Only the following file types are supported in eZnet CRM document pdf, doc, docx, ppt, pptx, xls, xlsx, rtf and txt.*

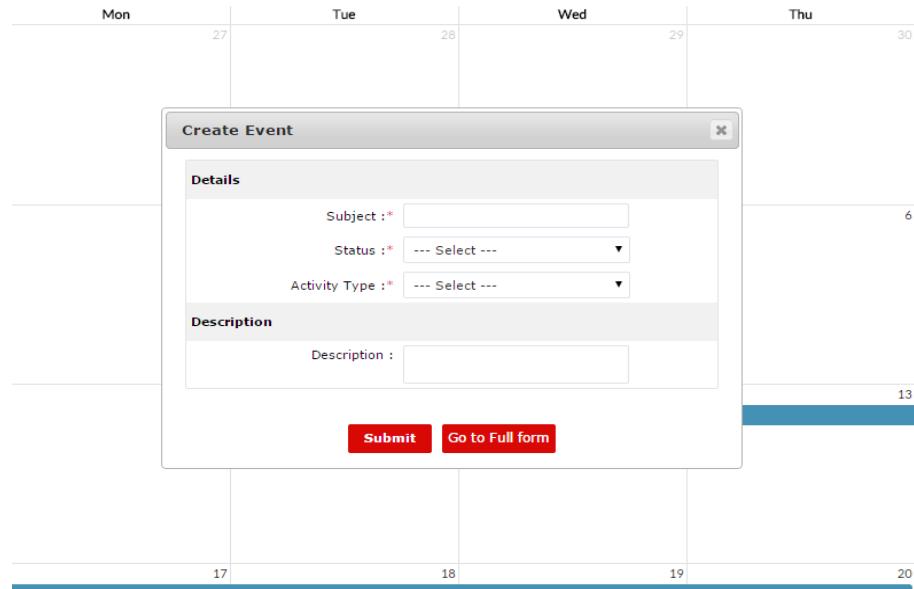
Many leads may be associated to a single campaign, you may have included some existing leads to take part in a particular campaign. In such cases, it is necessary that you keep track of all the leads as a result of the campaign. Using the Campaigns module, you can store all the necessary details in a well-organized manner, for future reference.

# Calendar

eZnet CRM is equipped with a **CALENDAR** to keep you aware of appointments, events and tasks for one occasion or recurring basis. Events and Tasks scheduled in the **LEAD, OPPORTUNITY, TICKET, QUOTES, or CUSTOMER** modules are displayed in the **CALENDAR** for easy access.

## Schedule Events/Tasks

Schedule an event or task using the calendar function by double-clicking the specific day. There is also a short form that allows you to put basic information about the event/task, as shown below.



To provide more details including time, attendees and reminders, proceed to the full form. As shown below, scheduling tasks in full form contain additional fields such as Location, End Date and Priority. In this screen, you are able to assign the Activity/Event to an active user and select the customer to which the activity relates.

A screenshot of the 'Add Activity' full form. The form is divided into several sections: 'Event Details' (Entry Type: One Time, Subject, Assigned To: Users/Group, Start Date & Time, End Date & Time, Status, Activity Type, Location, Customer), 'Reminder Details' (Send Reminder, Invite Employee), 'Related To' (Related Type), and 'Description' (Description with rich text editor). Buttons for 'Back' and 'Submit' are visible at the top right.

*Note: If you select Recurring as an Entry Type, you will be asked to choose an interval, whether its Bi weekly, Semimonthly, Monthly or Yearly.*

## Schedule Event/Task in Lead, Opportunity, Quotes and Customer

You can associate Events/Tasks in **Lead, Opportunity, Quotes and Customer** by scheduling them in the respective modules.

**From Dashboard: Lead > View Lead > Schedule Event**

**Opportunity > View Opportunity > Schedule Event**

**Quotes > View Quotes > Schedule Event**

**Customer > View Customer > Event/Task**

Your screen should display this window where you input the event/task details. Mandatory information is denoted by asterisks.

The screenshot shows the 'Add Event' form for a Lead. The 'Related Type' is set to 'Lead'. The 'Subject' field contains 'Contact'. The 'Assigned To' field shows 'Brian Cotton (Sales Executive)'. The 'Start Date & Time' is '2015-01-21 10:00 AM'. The 'End Date & Time' is '2015-01-20 10:00 AM'. The 'Status' is 'Planned'. The 'Activity Type' is 'Call'. The 'Priority' is 'High'. The 'Description' field contains 'Call Customer about this month's promotion'.

After submitting details for the event/task, for **Lead, Opportunity, Quotes, or Customer**, the screen below will show a successful submission. The details that you input will show in the related module and the Calendar module.

The screenshot shows the 'Manage Lead > Event Details' page for Lead [7]: Test Test. It displays a table with one record:

Title	Activity Type	Priority	Start Date	Close Date	Status	Action
Call	Call	High	January 21, 2015 00:30 AM	January 21, 2015 01:00 AM	Planned	X

A sidebar on the right shows a navigation tree with 'Schedule Event' selected.

These events/tasks will populate the **Calendar** module and alert the user of upcoming events.

## Reminders

You will notice three **ACTIVITYTYPE** icons at the bottom left of your eZnet CRM window.

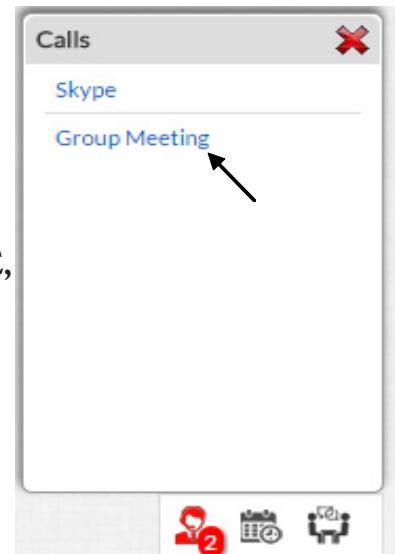


When a reminder for an **ACTIVITYTYPE** has been set prior to any calendar event/task, an alert displays in red.



These alerts will let you know which activity needs your attention.

Clicking the icon displays the name of the event.



Selecting the subject in blue will open the details of the **ACTIVITYTYPE**, as displayed.

Opening the subject of the **ACTIVITYTYPE**, will display the screen below, where you can edit details.

A screenshot of a web-based application's 'Activity Details' page. The top navigation bar shows 'Manage Activity > Activity'. The main content area is divided into several sections: 'Task Details' (entry type: One Time, subject: Complete Inventory, start date: November 24, 2014 17:30:00, status: Planned, activity type: Task), 'Reminder' (reminder: No), 'Description Details' (description: blank), 'Comment Information' (no comments), and 'Comment' (comment input field: 'Enter Your Post Here' and a 'Post Comment' button). There are also 'Edit' and 'Back' buttons at the top right.

## Cancel or Edit Recurring Events/Tasks in Calendar

You may cancel or modify any existing recurring events/task in the main menu of the **Calendar** module.

**From Dashboard: Calendar > Recurring Event/Task**

When you have arrived at the **RECURRING EVENT/TASKS** menu, a list below shows all the event/tasks that you selected as a recurring entry in the **Calendar**.

Main Menu

- Calendar View
- Manage Event / Task
- Recurring Event / Task**

Recurring Event / Task

Title	Activity Type	Interval	Entry Date	Every	Entry From	Entry To	Action
Testing	Call	Daily			February 6, 2015	February 9, 2015	

Total Record(s): 1 Page(s): 1

Select an action Icon to edit and the screen below will appear.

Recurring Event / Task

Title	Activity Type	Interval	Entry Date	Every	Entry From	Entry To
Testing	Call	Daily			February 6, 2015	February 9, 2015

Total Record(s): 1 Page(s): 1

Recurring Event / Task » Edit Recurring Event

Title: Testing  
Activity Type: Call  
Entry Type: Recurring  
Interval: Daily  
Entry From: 2015-02-06   
Entry To: 2015-02-09

**Update**

This screen will only allow you to edit **Entry Type, Interval** and Start /Stop dates.

*Note: To further edit the details on this recurring event, proceed to the Calendar module and select the Event/Tasks you wish to modify.*

To cancel the Events/Tasks listed, select the **red x**, and a notice should appear, as shown below.

Recurring Event / Task

Title	Activity Type	Interval	Entry Date	Every	Entry From	Entry To
Testing	Call	Daily			February 6, 2015	February 9, 2015

Total Record(s): 1 Page(s): 1

Recurring Event

Are you sure you want to cancel this Recurring Event?

Ok Cancel

Selecting **red x**, will cancel the event and display the message shown below.

Event recurring has been cancelled successfully.

# Billing and Payments

eZnet CRM offers affordable pay-as-you-go pricing for all packages. Purchase any package except and receive a 30-day free trial with no credit card required. All packages include the option to purchase additional space for your convenience.

Update your edition, change credit card details, and manage your account at anytime.

We accept payments via Visa, MasterCard, American Express or PayPal. We also accept payment via bank transfer. For further details, please contact [info@eznetcrm.com](mailto:info@eznetcrm.com).

## STANDARD

<b>STANDARD</b>
<b>us \$10</b>
user/month
5 GB

The Standard account is a basic account equipped with Lead, Opportunity, Document and Users modules only. Provides an easy way to store leads and launch campaigns with 5GB of free available space.

## PROFESSIONAL

<b>PROFESSIONAL</b>
<b>us \$15</b>
user/month
20 GB

The mid-level Professional account provides the most cost-effective plan. Most modules are available with the exception of Opportunity, Quote and Document. This package enables you to up-sell to leads without limiting your ability.

## ENTERPRISE

<b>ENTERPRISE</b>
<b>us \$30</b>
user/month
70 GB

The fully equipped premium Enterprise account provides full-access to all the tools the eZnet CRM has to offer. All of the modules are available for use, which maximizes your sales and marketing efforts.

## PRIVATE CLOUD

CRM for multi-level organizations

us \$30

user/month

The option of the Private Cloud allows the Enterprise user to transfer eZnet CRM on-premises. The buyer is given a license for the amount of users chosen and given the permission to utilize eZnet CRM on your own servers and security infrastructure.

Whichever option you choose eZnet CRM offers the most flexible and comprehensive options for you and your business.

## UPGRADING

There are two methods available to upgrade your account.

Inside CRM: To upgrade your account in the CRM, simply go to the top-right section of your CRM screen.

Select Upgrade and you will be taken to the eZnet CRM website where you will proceed to Menu item Pricing & Signup.

The screenshot shows the eZnet CRM dashboard. At the top, there is a header with account information: "Account Expires in 30 days", "Total Storage: 5 GB", "Storage Used: 2.86 MB", a blue "Upgrade" button, a "Change Password" link, and a "Log Out" link. Below the header, there is a location indicator "Location: St Ann's Bay, St. Ann, Jamaica" and navigation links "Back to Main Dashboard" and "Welcome JheanelleS!". A large red arrow points from the text "Select Upgrade and you will be taken to the eZnet CRM website where you will proceed to Menu item Pricing & Signup." to the "Upgrade" button in the header. The main content area displays a table of document uploads:

Upload	Created On	Status	Action
Download	3 Dec, 2014, 20:19:52	Active	<a href="#">Send Document</a>

To the right of the table is a search sidebar with fields for "Search By" (set to "All"), "Keyword", "Order By" (set to "Desc"), and a red "Search" button.

On Website: When you have successfully logged in to the eZnet CRM website, go to the Pricing & Signup menu, you will then notice the option to upgrade your account.

Your new upgraded price will be based on the amount of users, additional space, space unit and plan duration.



Thanks for Choosing eZnet CRM for your business needs.  
If you have any questions, suggestions or concerns about eZnet CRM,  
please contact us  
at  
[info@eznetcrm.com](mailto:info@eznetcrm.com)  
or call us  
1-877-368-4446

*This page intentionally left blank.*