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eZnetCRM

USER GUIDE & MANUAL

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

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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

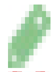
Set up the organization-wide hierarchy by creating Roles and assigning it to users.

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:

 - View

 - Edit

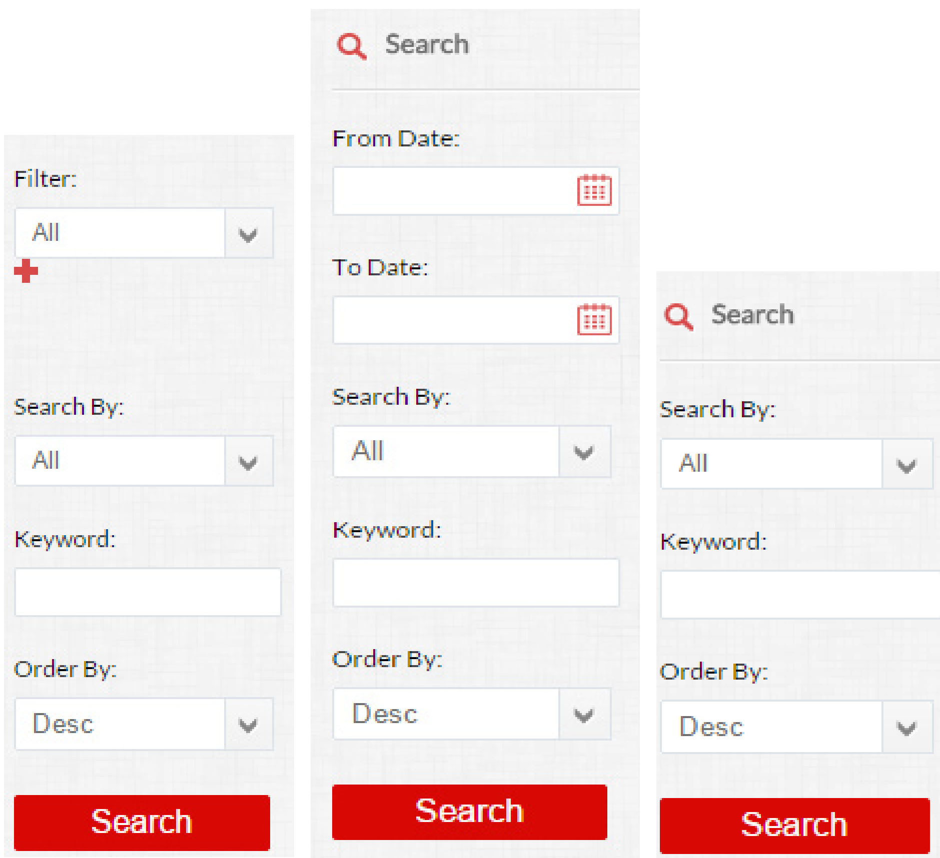
 - Delete

Navigate Records

View various records using the arrow  located in the modules.

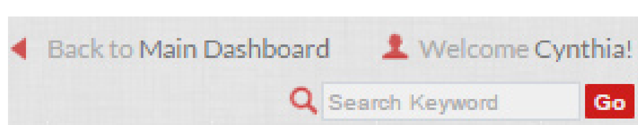
Search/Filter Tools

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.



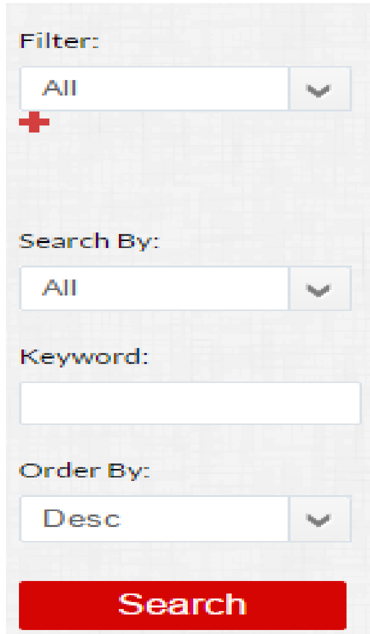
These are visible on the right side of various modules and can be used to filter and search for specific information in the CRM.

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

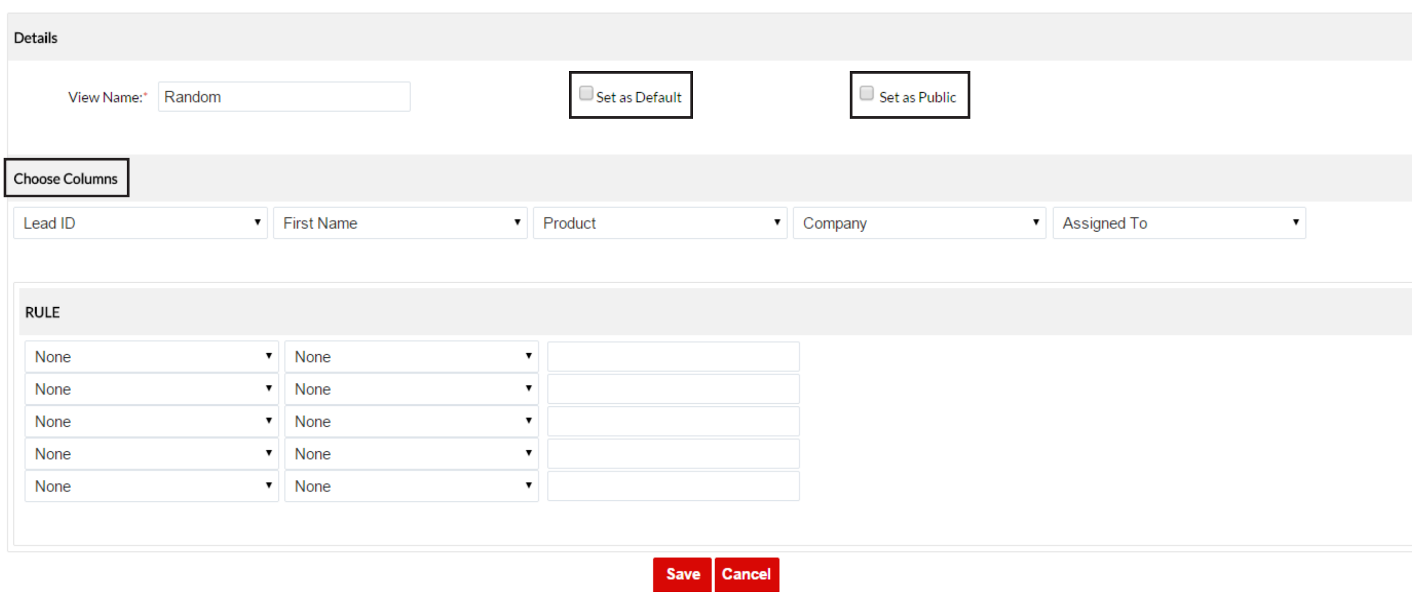


Custom/Filter Views

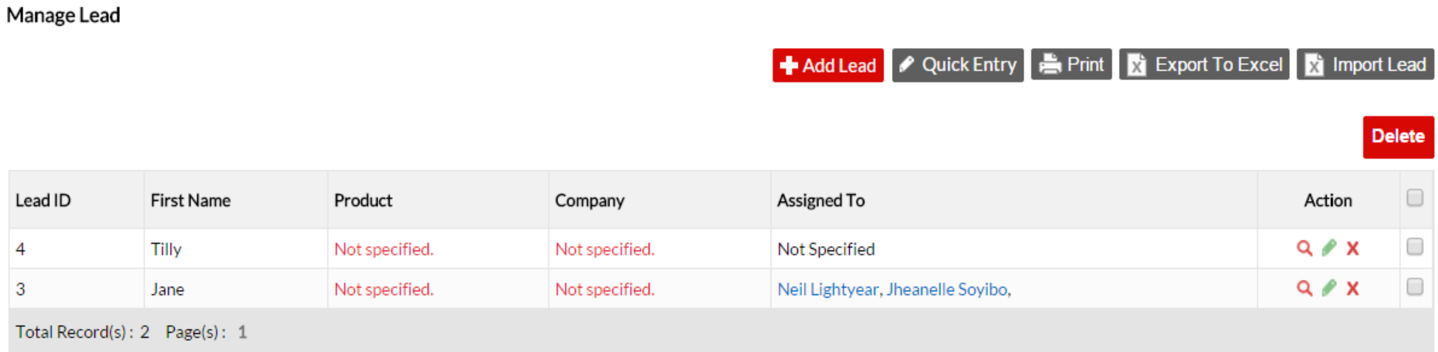
As a user of eZnet CRM, you have the capabilities of accessing customized lists. On the right-hand side of your CRM, you will notice a Search or Filter column. To customize your view, select the red plus sign (as indicated by arrow).



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.



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.

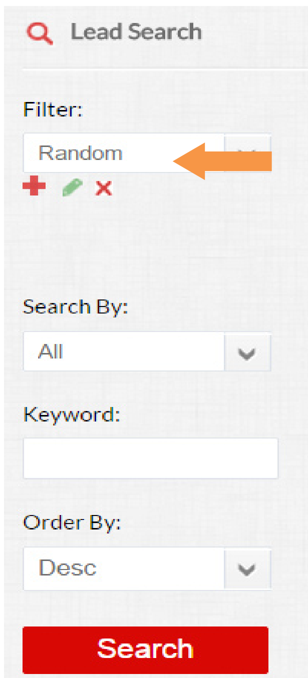


Manage Lead

Lead ID	First Name	Product	Company	Assigned To	Action
4	Tilly	Not specified.	Not specified.	Not Specified	
3	Jane	Not specified.	Not specified.	Neil Lightyear, Jheanelle Soyibo,	

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

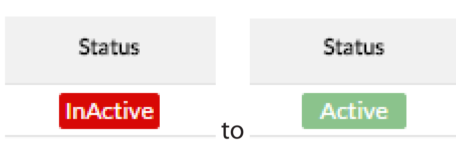
After your filter has been saved, CRM will display the information based on the columns and parameters including the name of the filter.



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.**

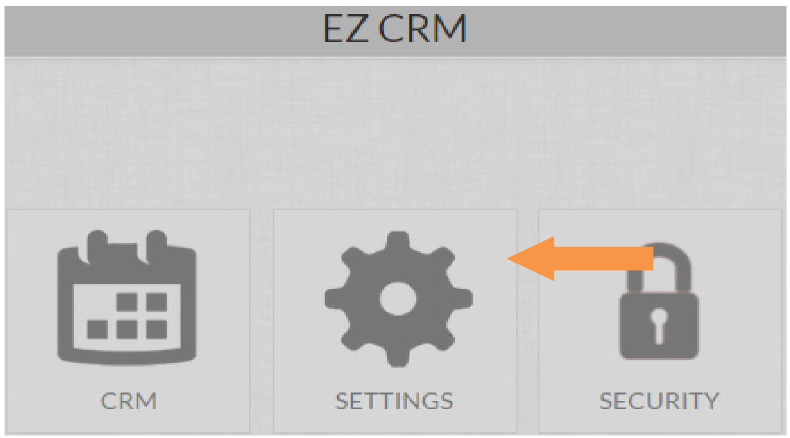
Note : Only full-service administrators have the ability to change user status.

Getting Started

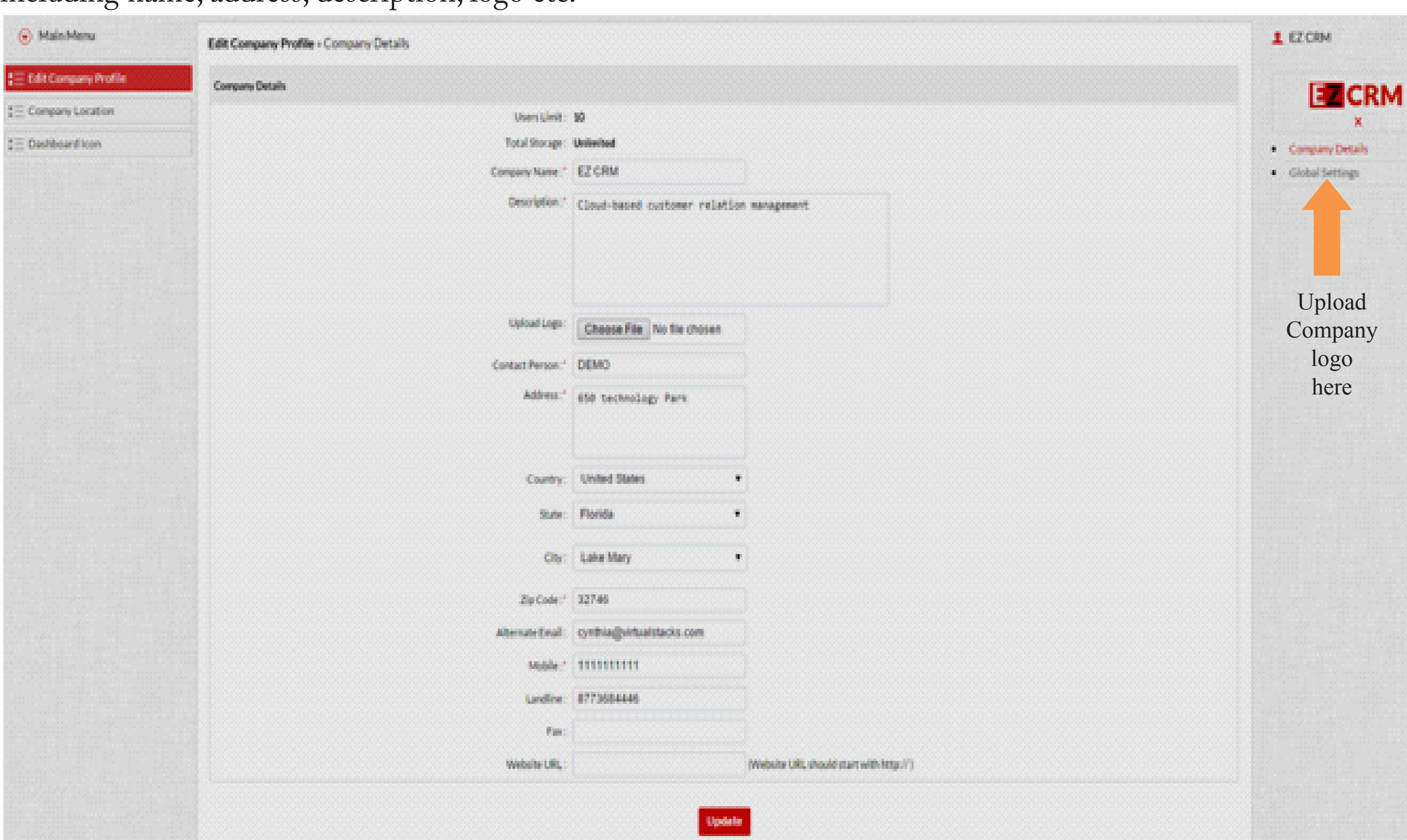
Organization Settings

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 which will take you to the Company Settings page where you can Edit Company Profile, Locations, manage users Dashboard and Call Settings.

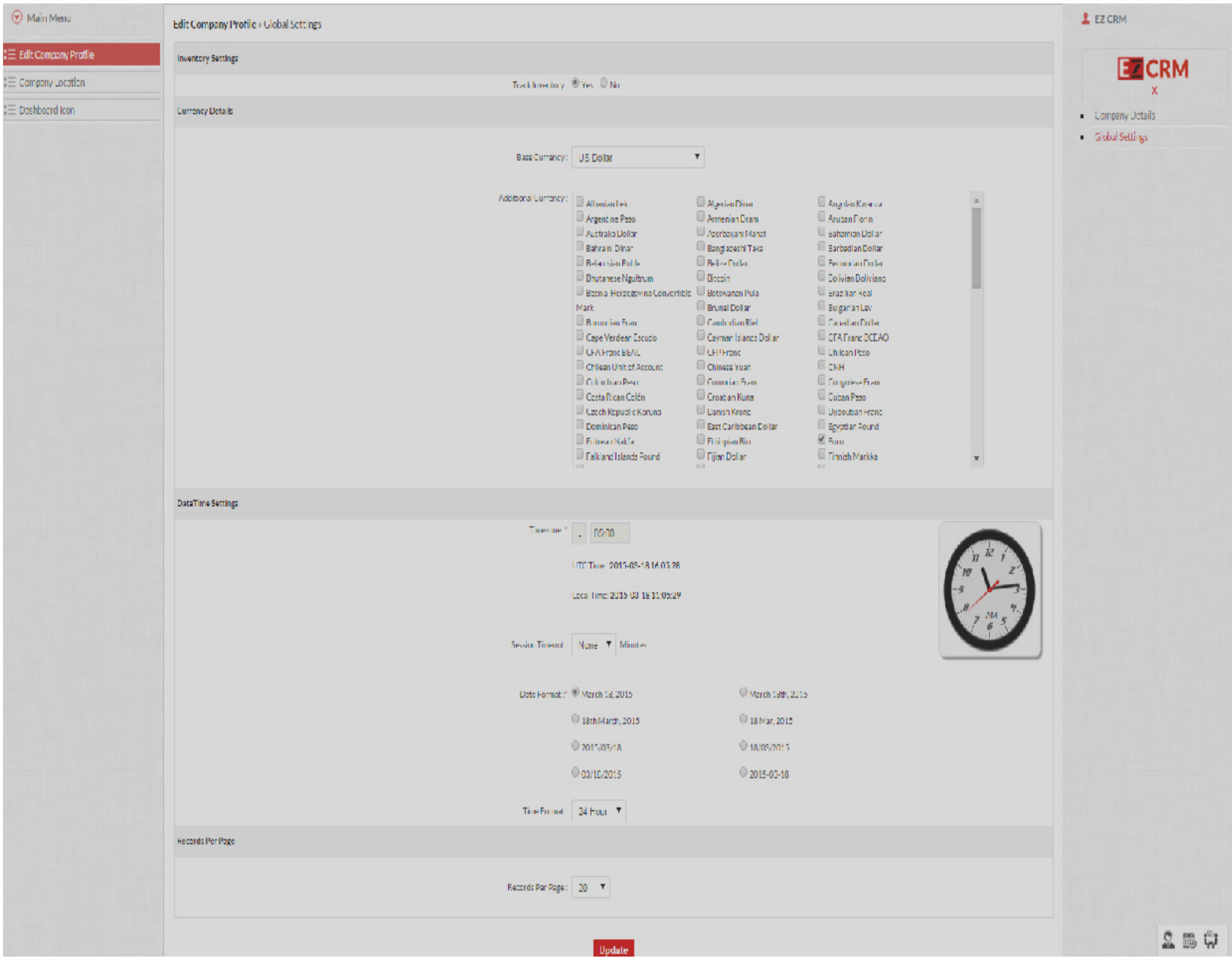
From Main Login Page : Settings > Edit Company Profile > Company Location



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



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



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

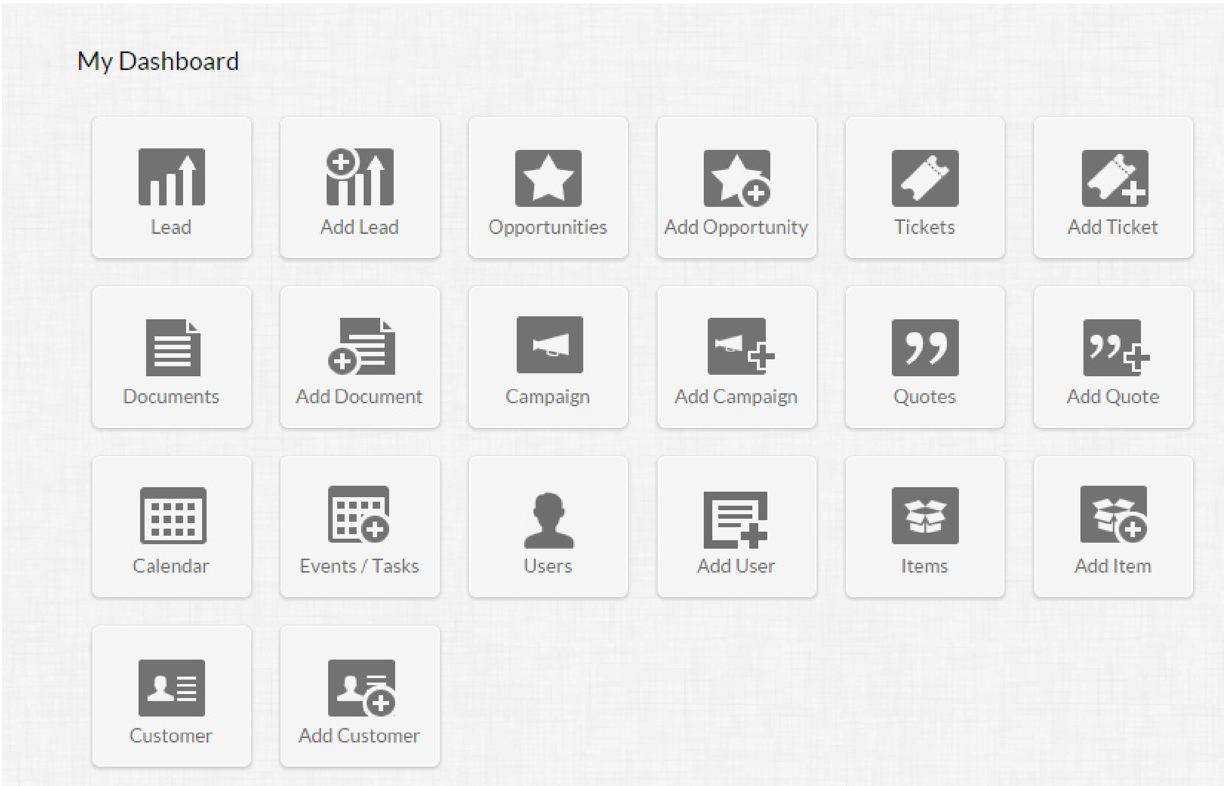
Add Location

Address	City	State	Country	Zip Code	Timezone	Status	Action
650 technology Park	Lake Mary	Florida	United States	32746	-05:00	Active	Primary Location
Total Location : 1							

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.

<u>Administrators</u>: 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.*

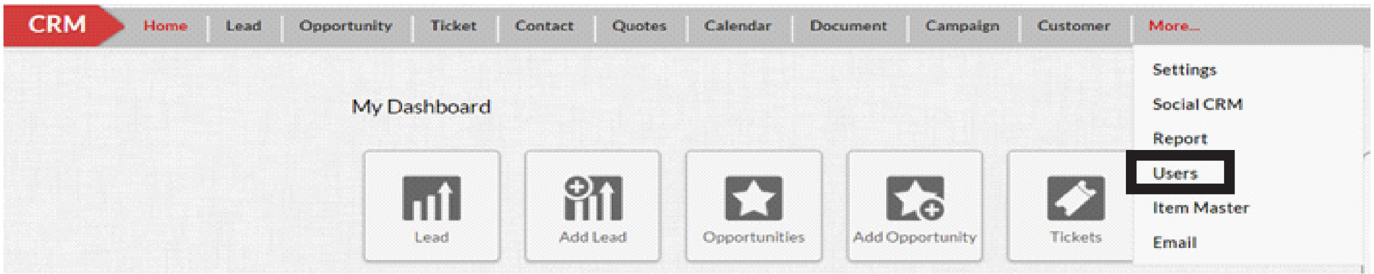
<u>Standard Users:</u> Users who can access data according to the defined permissions (profiles) and roles defined by the Administrator. They may be employees and non- empolyees. *Example: Sales Managers, Marketing Managers, Consultants, etc.*

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.

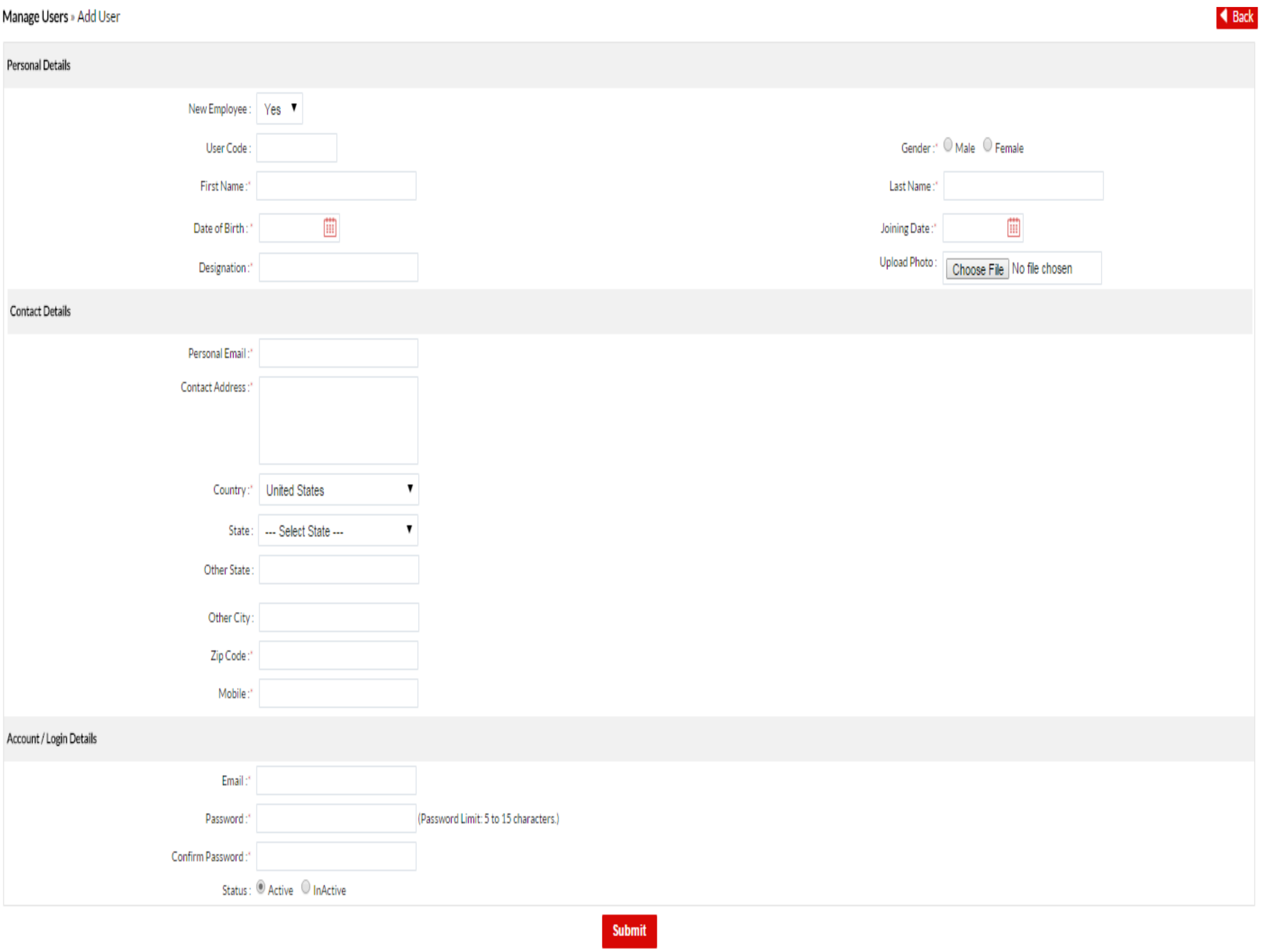
Note : Users with limited access cannot add, change or edit ***USERS.***

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.



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

Print | Export To Excel | Add User

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 , 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

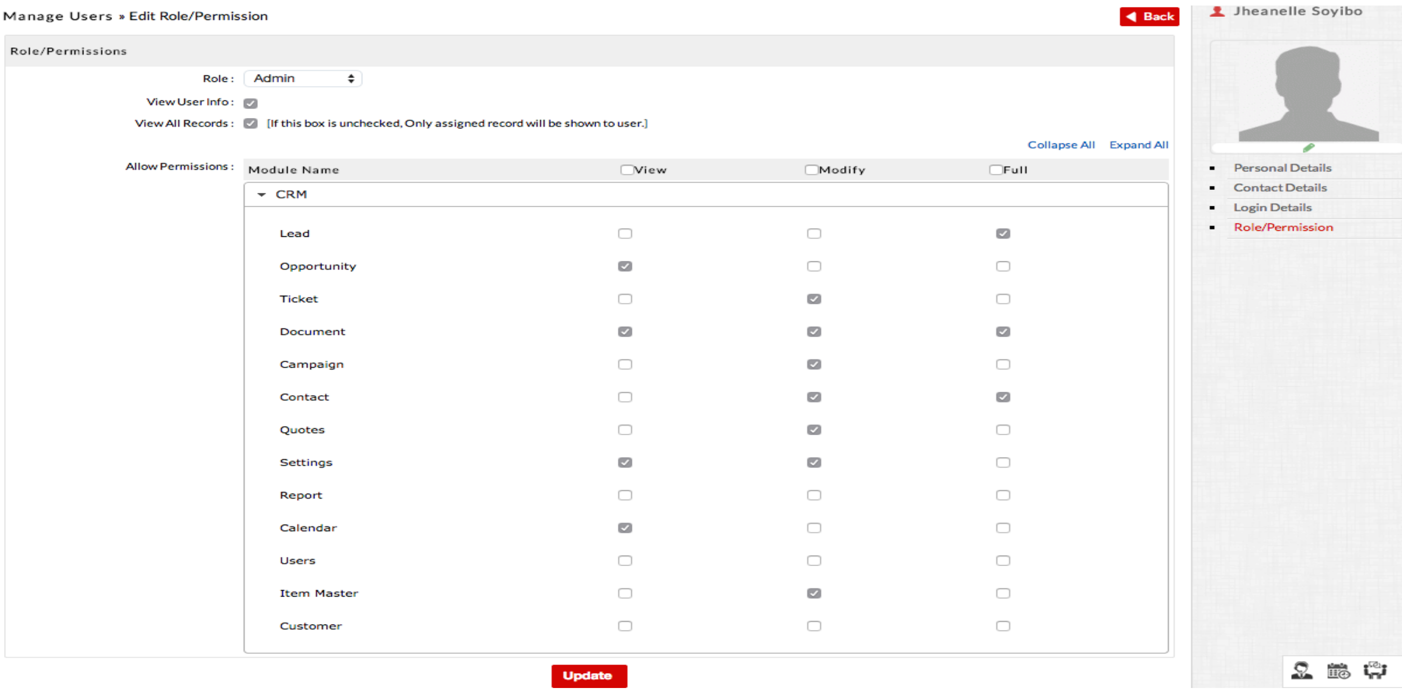
When setting up eZnet CRM, your users should have designated roles, based on the department and or responsibilities they have. First, the Administrator must create these roles in **SETTINGS** in order to assign them.

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.



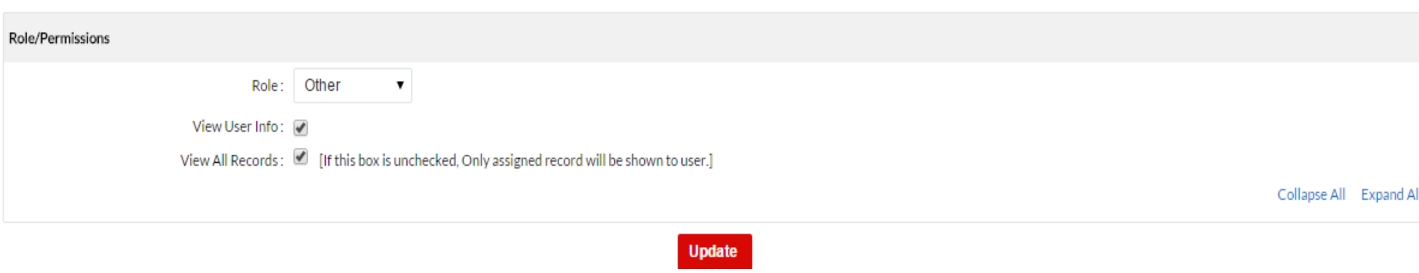
The photo above displays the Administrator's view of the Role/Permission of the **USER** module in the CRM. The panel gives the Administrator or full-access user the ability to modify modules shown on the dashboard of other users. The Administrator has to give the full-access user permission to adjust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

Permissions

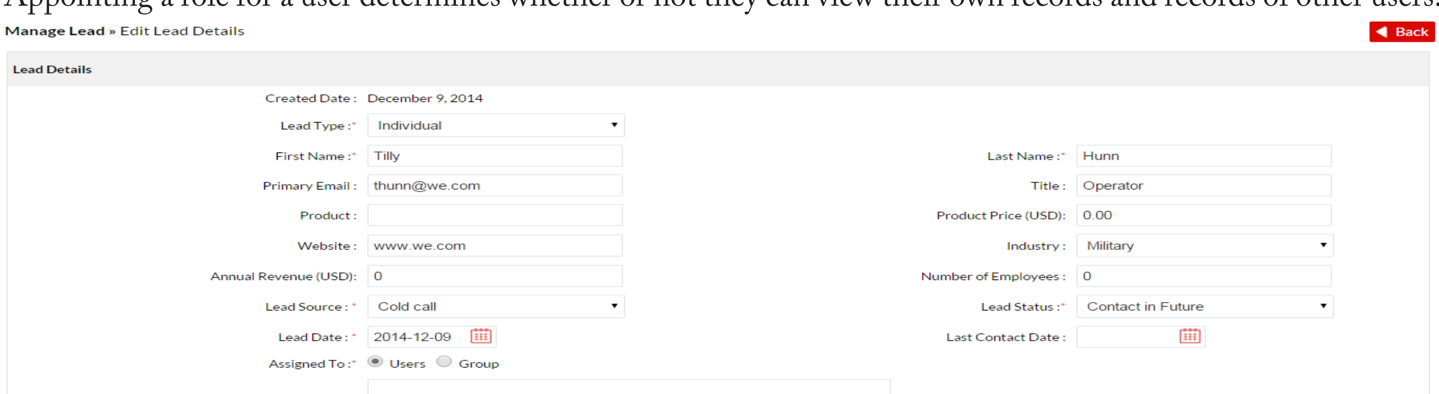
Based on the duties and responsibilities of the eZnet CRM user, they will be able to utilize certain functions based on the **ROLES /PERMISSIONS** given by the Administrator.

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.

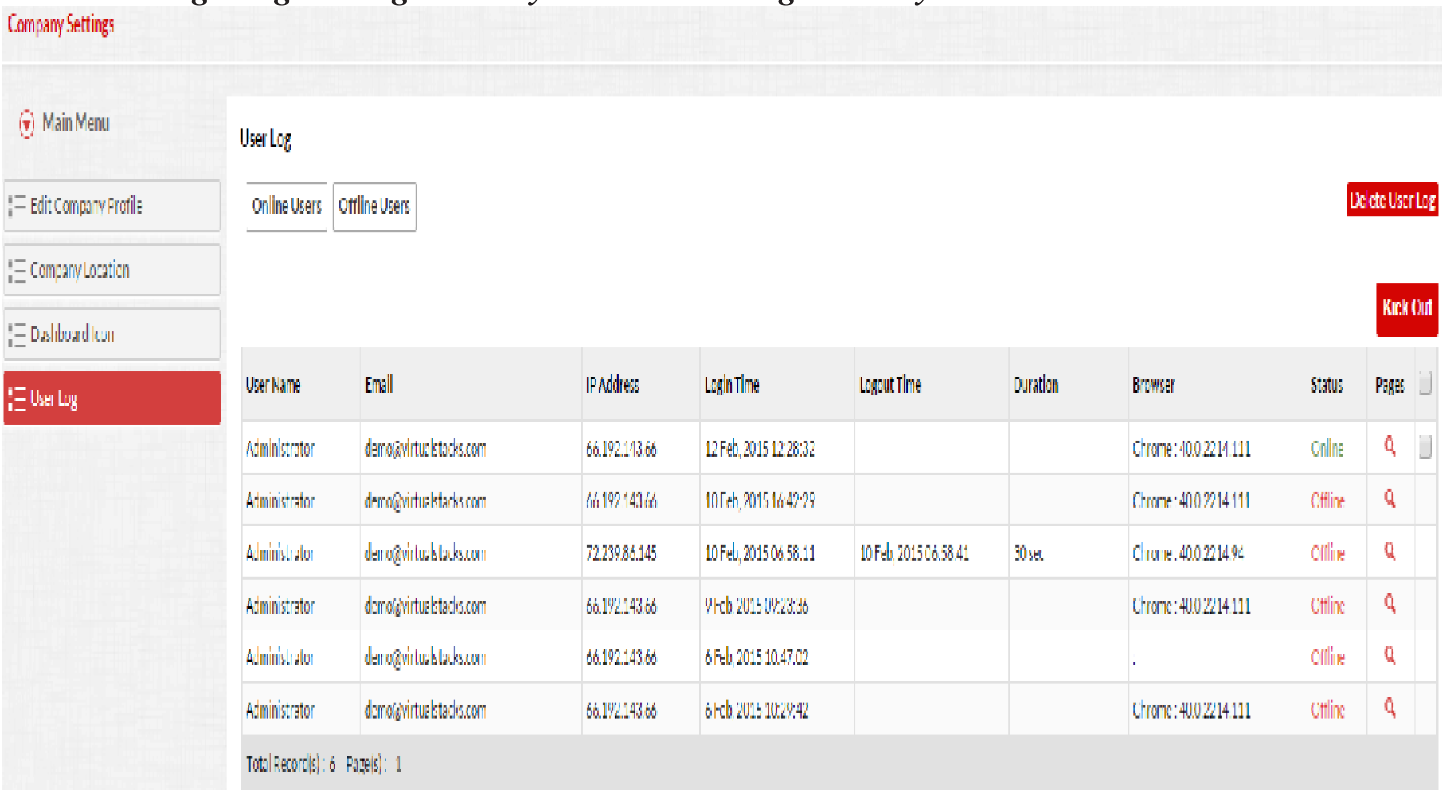


Appointing a role for a user determines whether or not they can view their own records and records of other users.



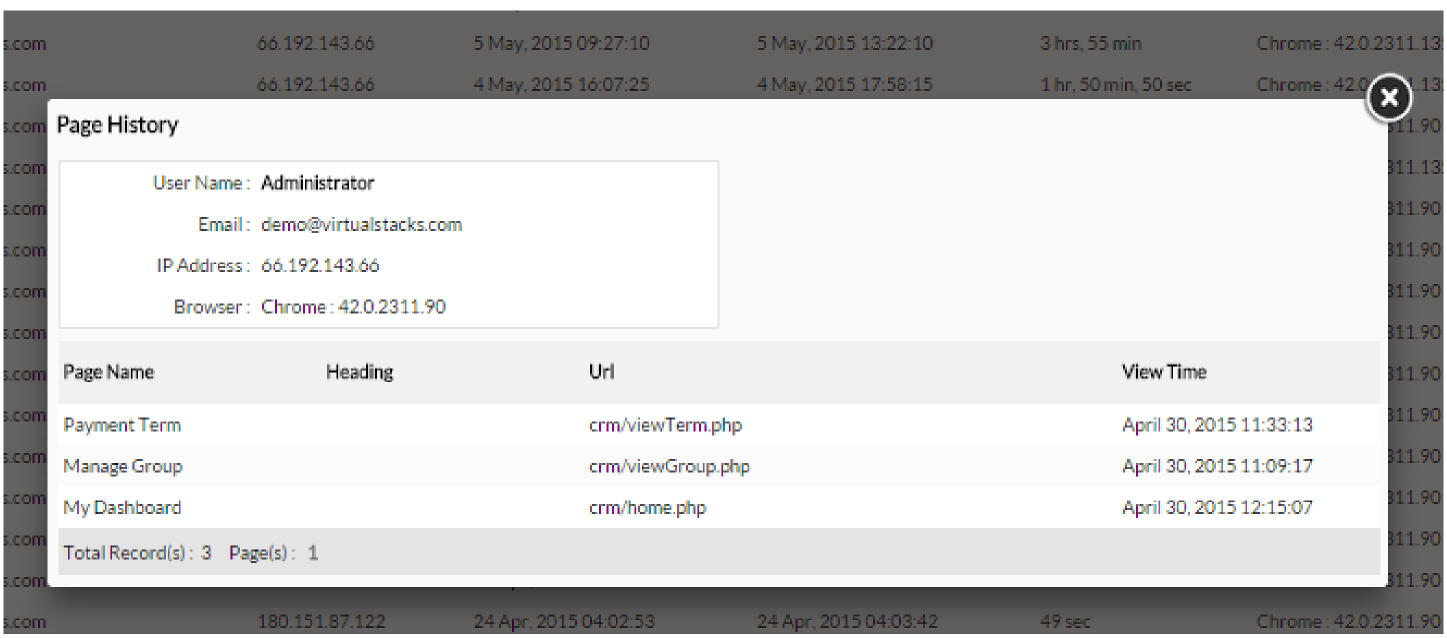
Session Log

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



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

The **Session Log** records the credentials and sessions of each the 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.

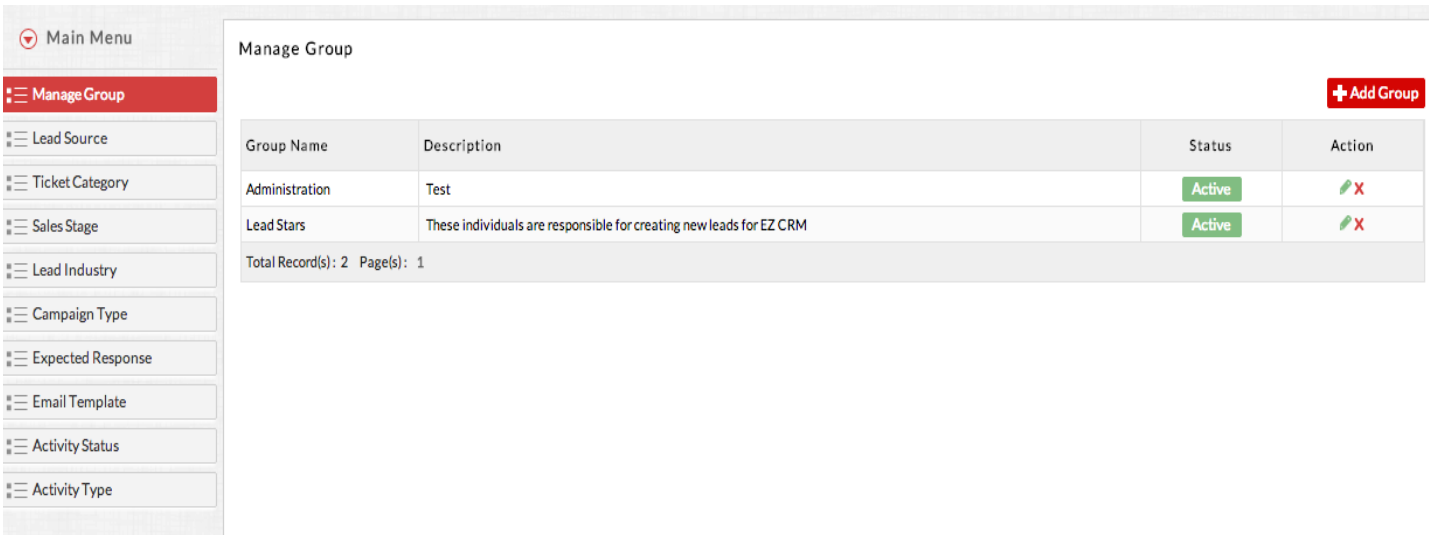


For further information regarding offline and online users, you can view the **Page History** of the specific user, as seen in the previous photo. It provides information such as the **Page Name, Heading , URL** and view the **Time** of each session for the User.

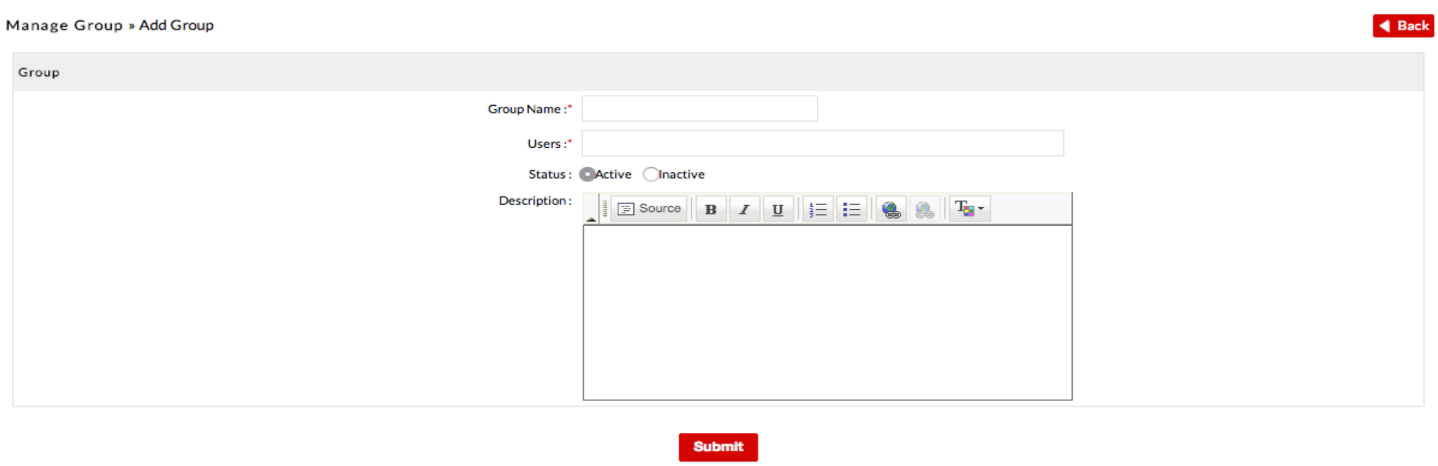
Create Groups

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**.*



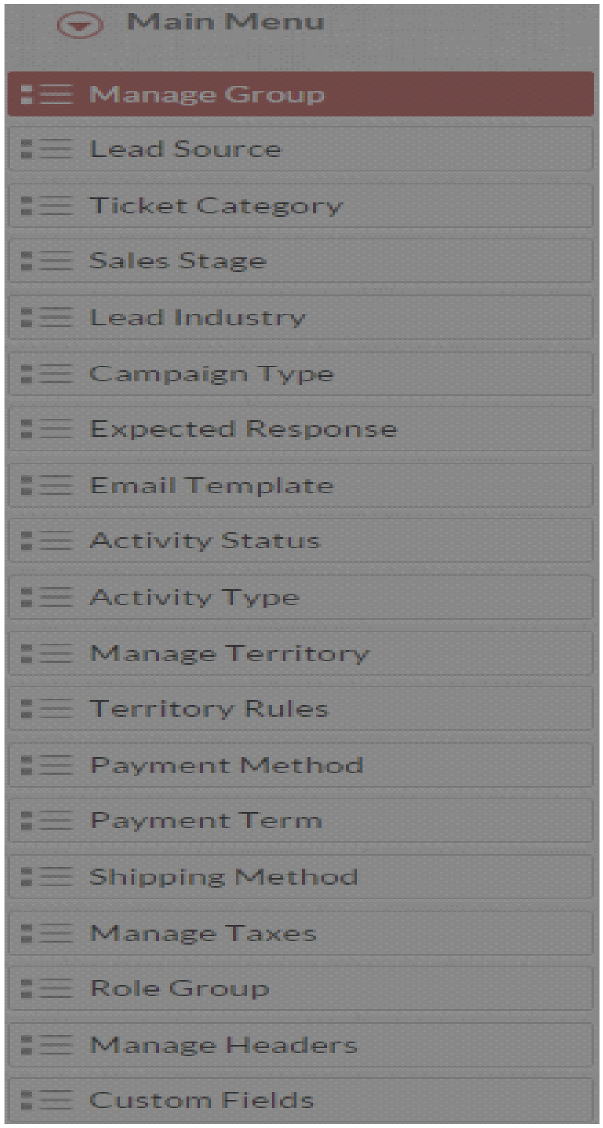
Selecting **Add Group** will take you to the screen below, where you can create the group and the users that belong to it.



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

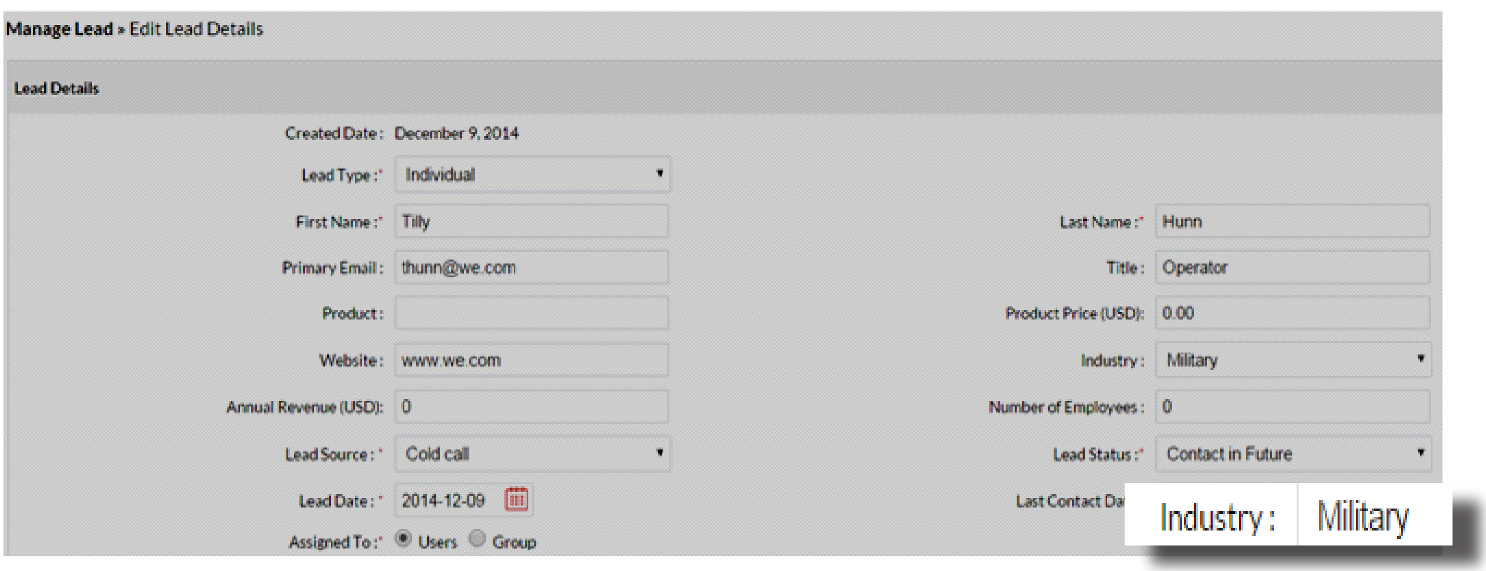
+ Add Lead Industry

Lead Industry	Status	Action
IT	Active	✎ X
Retail	Active	✎ X
Hospitality	Active	✎ X
Media	Active	✎ X
Total Record(s) : 4		

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

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

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



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

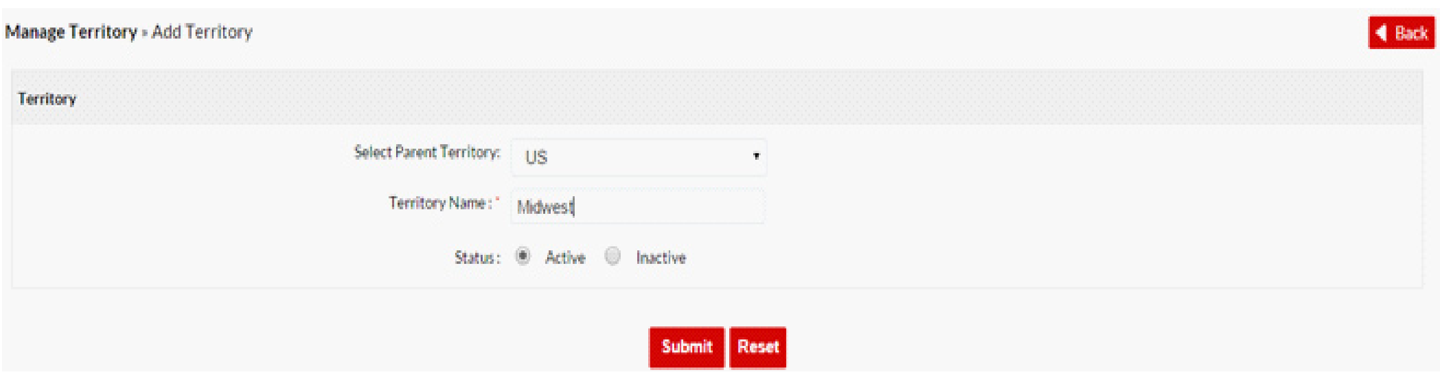
Territory Management is a function by which customer accounts and users are grouped based on a defined geographic criteria. This makes it easy to share customer accounts among different sales teams in your company.

Add Territory

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

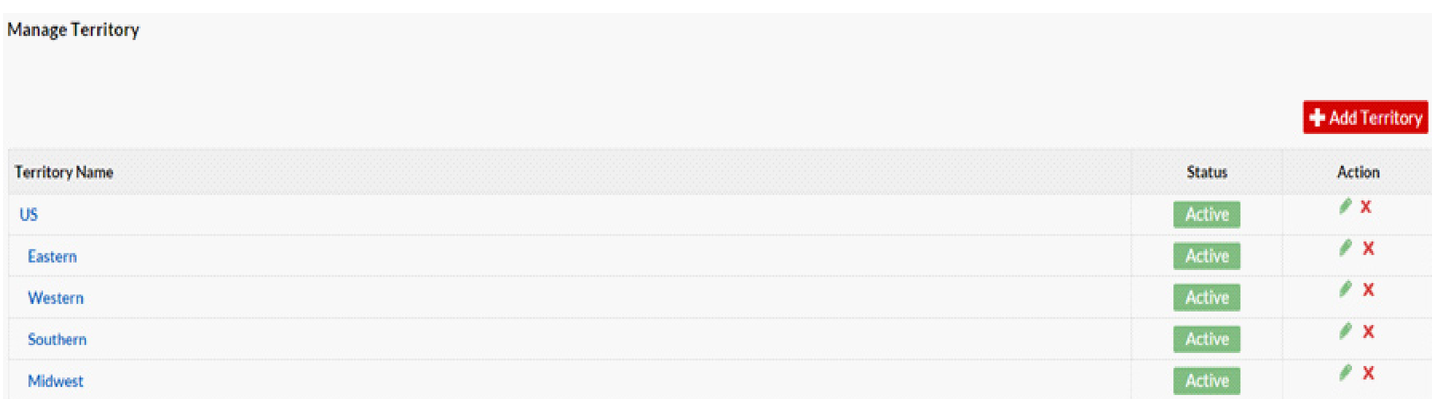
To create Territories in eZnet CRM :

From Dashboard: Settings > Manage Territory > Add Territory



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

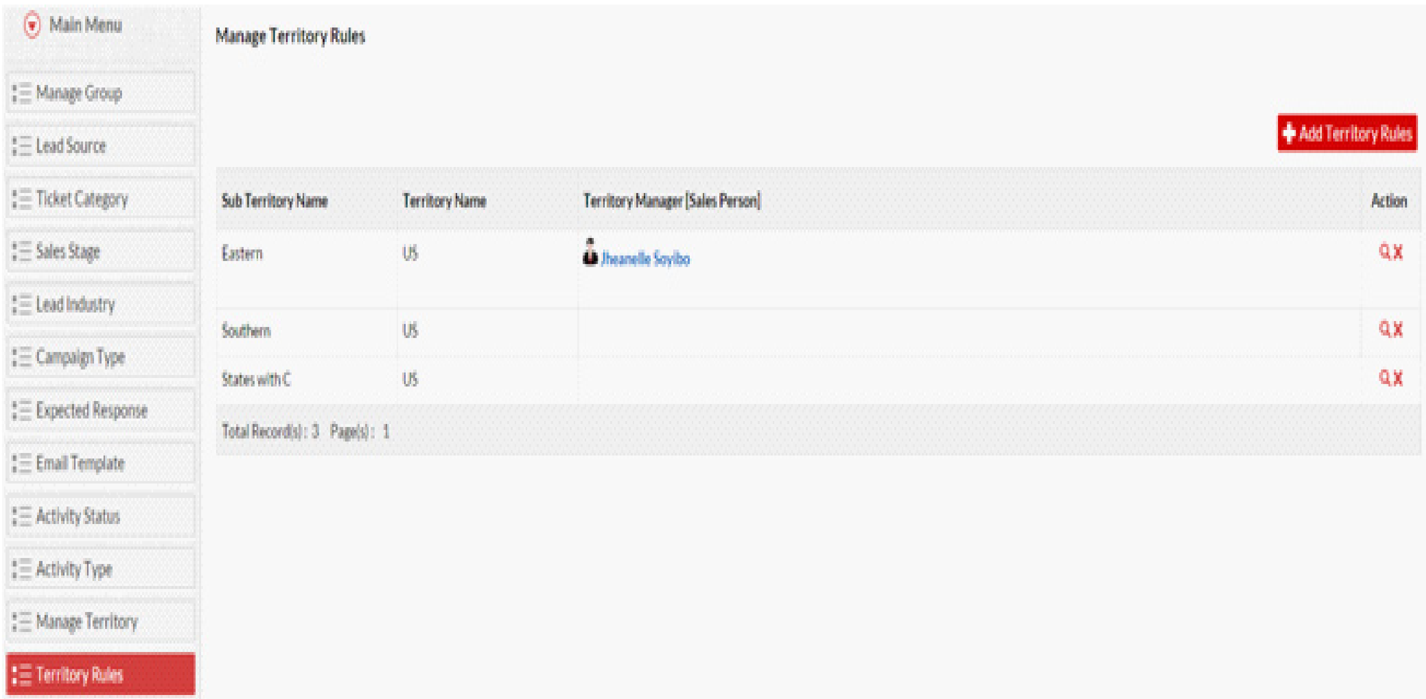
If the submission is successful, your Territory name will be added to the list as seen below.



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 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.

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 » Add Payment Method

Payment Method :* Paypal

Status : Active Inactive

Submit Reset

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

Payment Term

+ Add Payment Term

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

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.

Payment Term » Add Payment Term

Term Name :* Paypal

Net :* 5 (days)

Due in : 25 (days)

Status : Active Inactive

Submit

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.

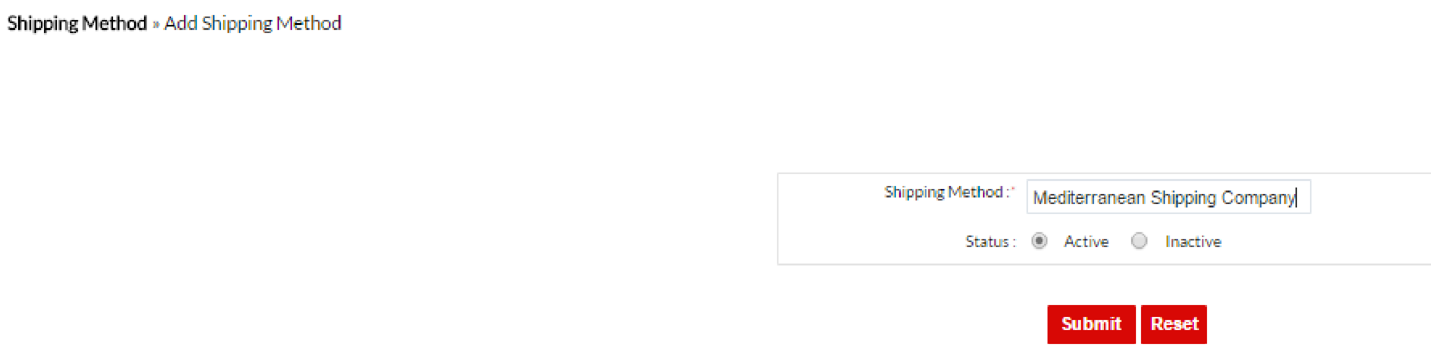
Shipping Method

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 :

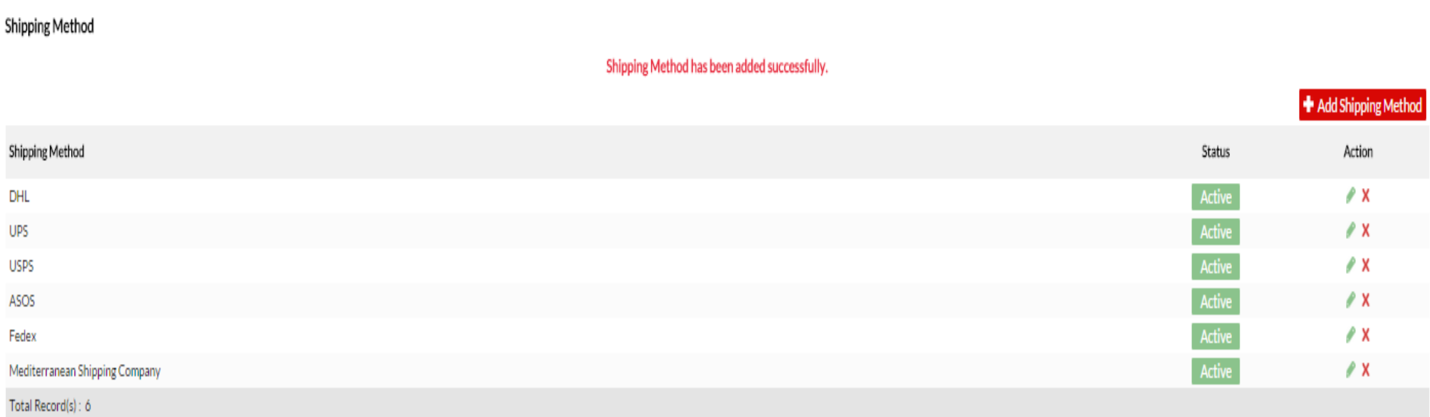
Settings > Shipping Method

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

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



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

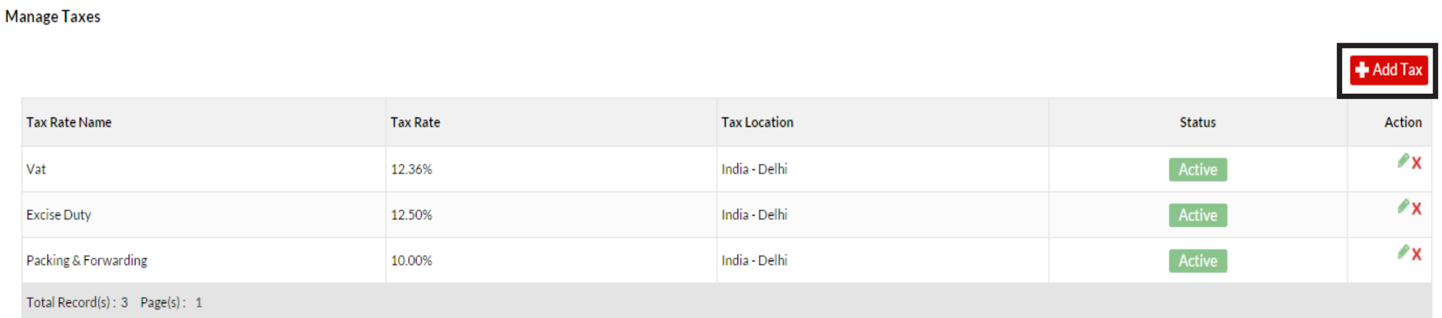


Manage Taxes

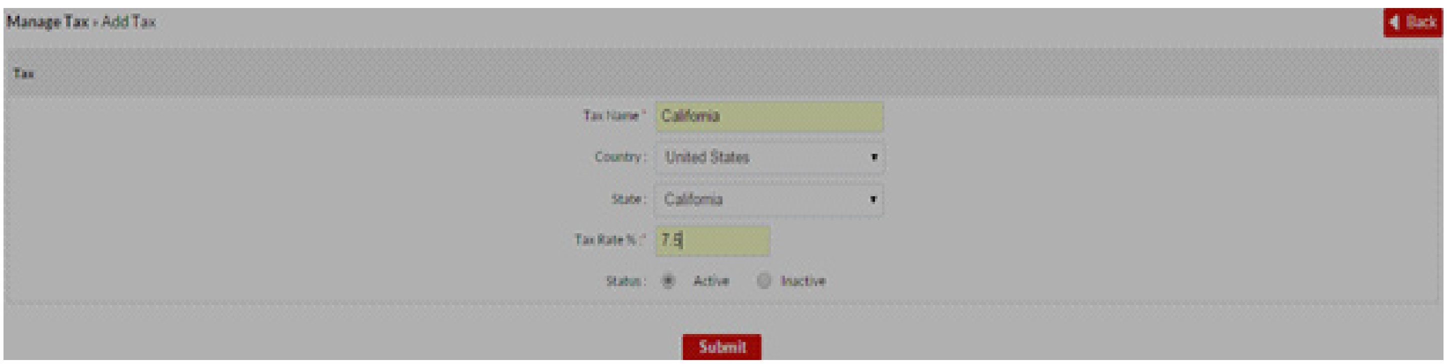
One of eZnet CRM's advantage is the ability to customize the minor details that count. This particular setting is advantageous when you conduct business nationally and internationally. You are able to input multiple tax rules that may later be suitable when creating quotes, shipping and sales orders.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

Settings > Manage Taxes > Add Taxes

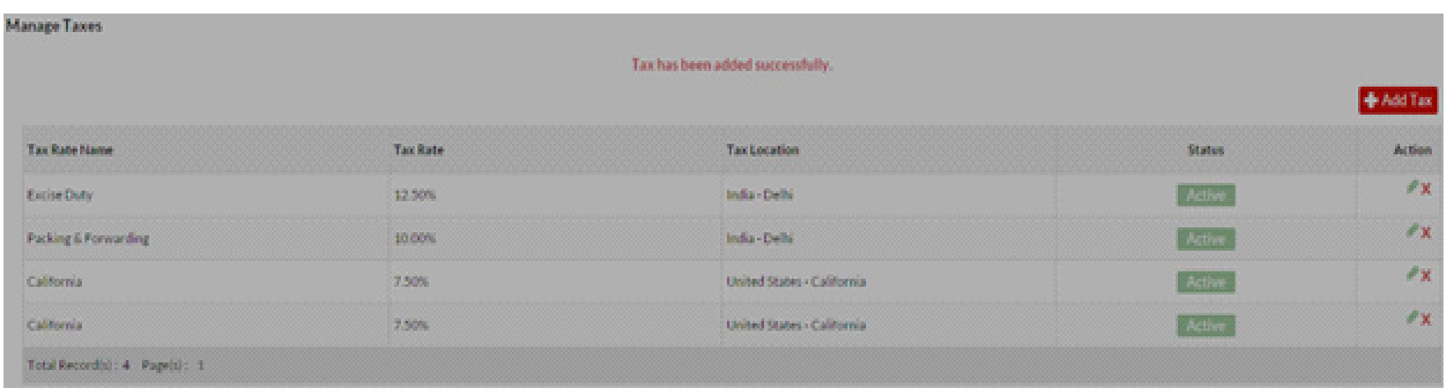
To add a tax rule select "Add Tax" located on the right side of the Manage Taxes area.



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



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.



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

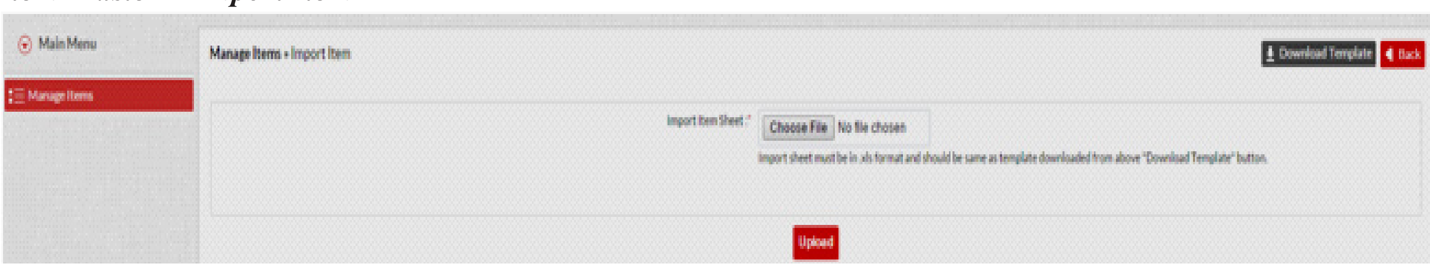
When given the option to import a document in eZnet CRM, it must be formatted as an .xls or .csv file. You encounter this option in the **Lead, Item Master** and **Customer** modules. However, in the **Item Master,** it is recommended to download the template that includes **SKU, Item Name, Price, Quantity,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

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

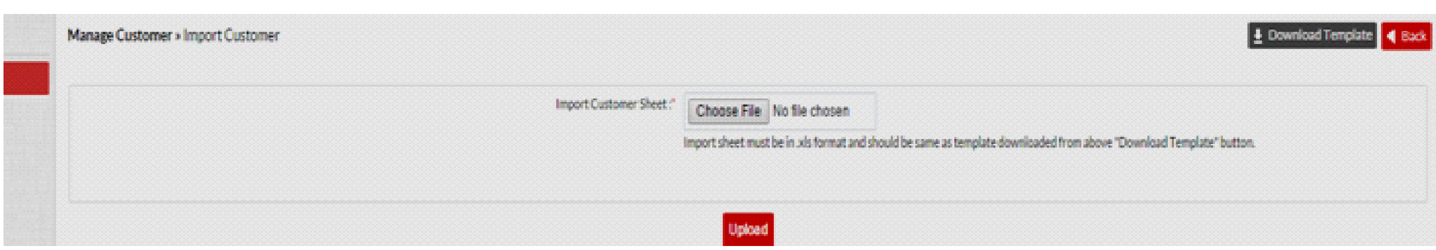
Lead > Import Lead

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.

Item Master > Import Item



Customer > Import Customer



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 

Export to Excel 

or Export to PDF 

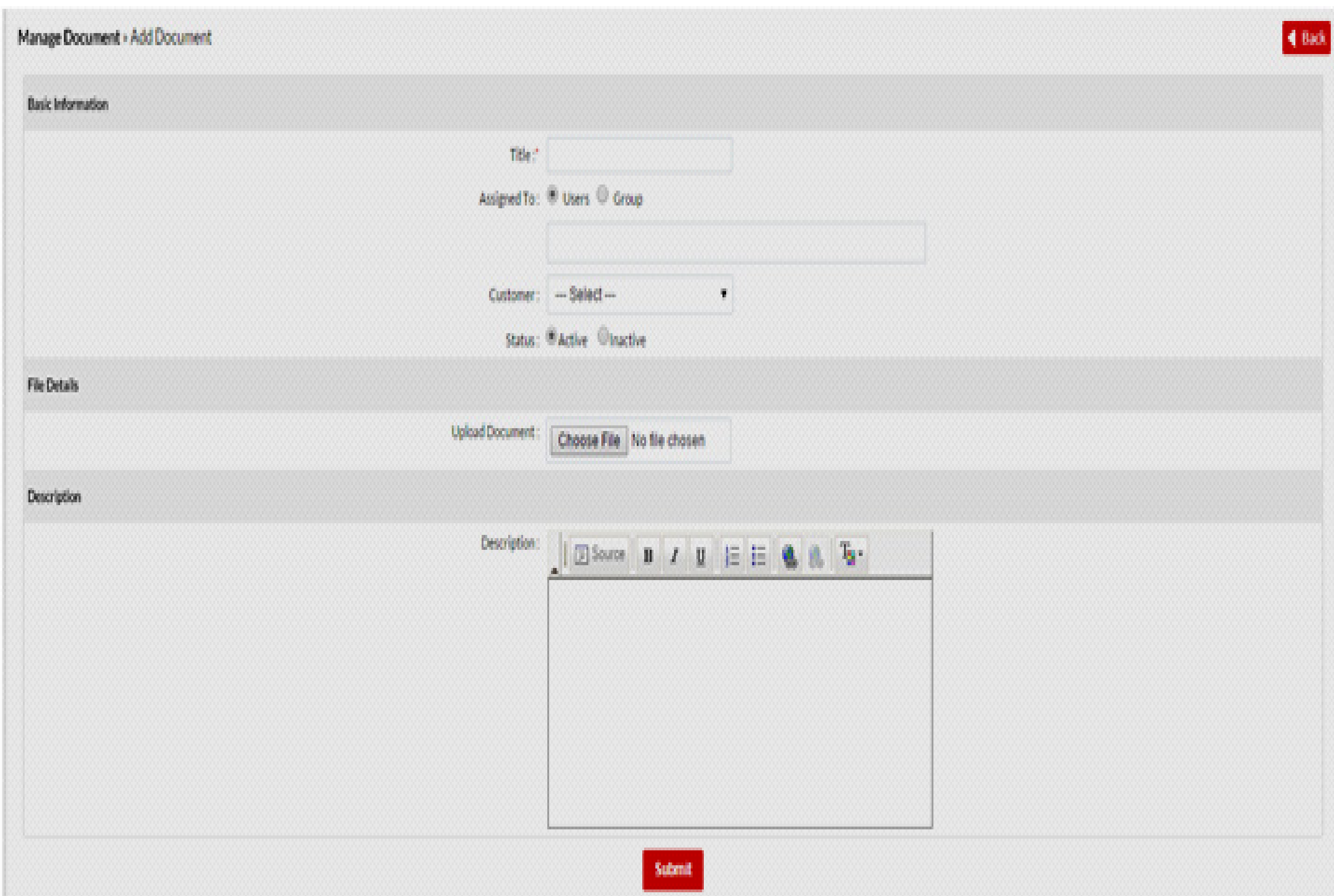
can be downloaded for offline use.

Document Library

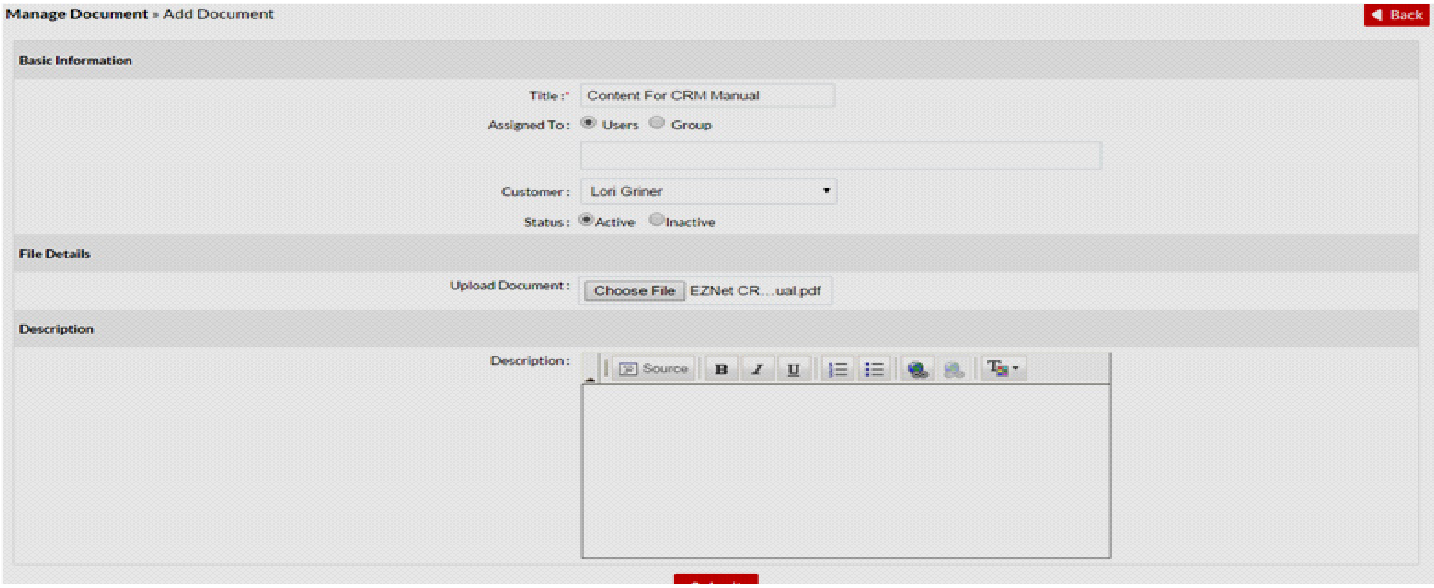
Manage all your business-related documents in a single place for easy access and storage space. Documents from **Lead, Opportunities, Tickets, Quotes, Campaigns**, **Events** and **Customer** modules are accumulated here. The Documents module is a central repository where you can upload and download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

Upload Documents

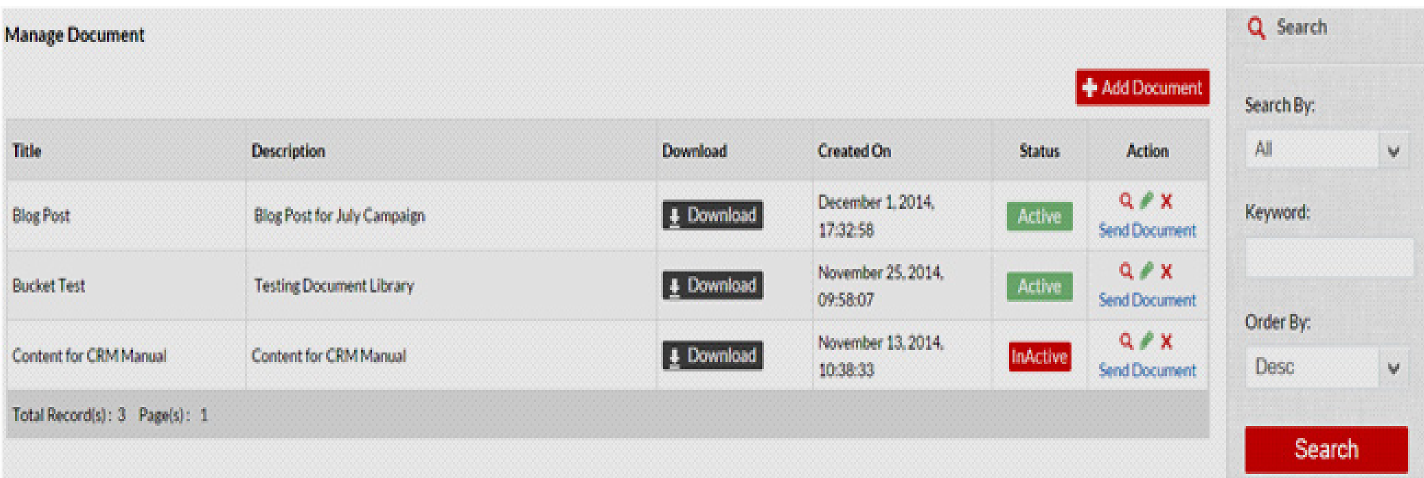
Documents can be stored and assigned to various users or groups in eZnet CRM . The screen below demonstrates the upload screen.



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



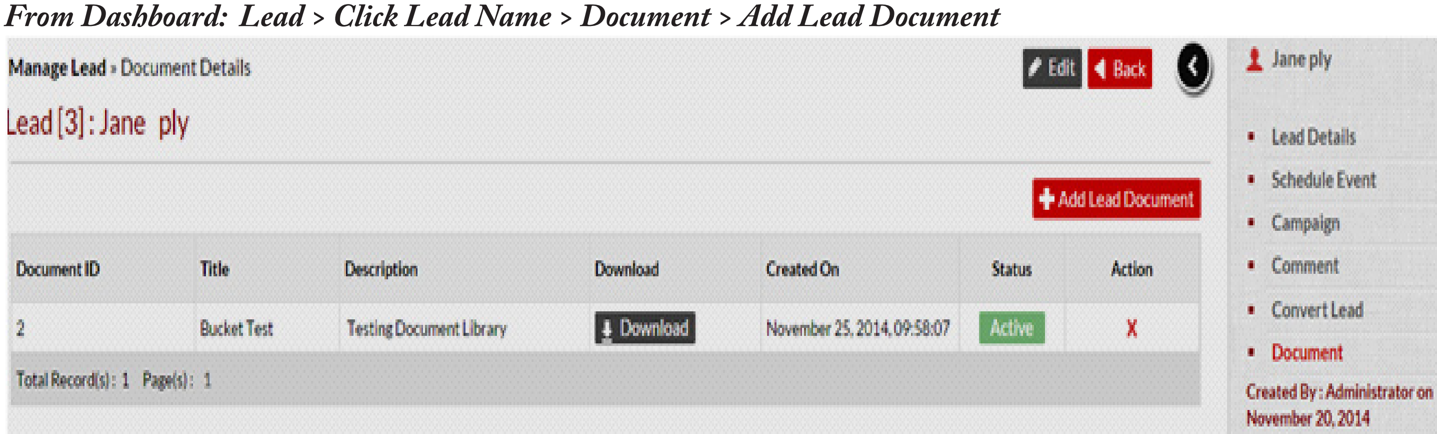
Note: Only the following file types are supported in an eZnet CRM document. PDF, doc, docx, ppt, pptx, xls, xlsx, rtf and txt.



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.

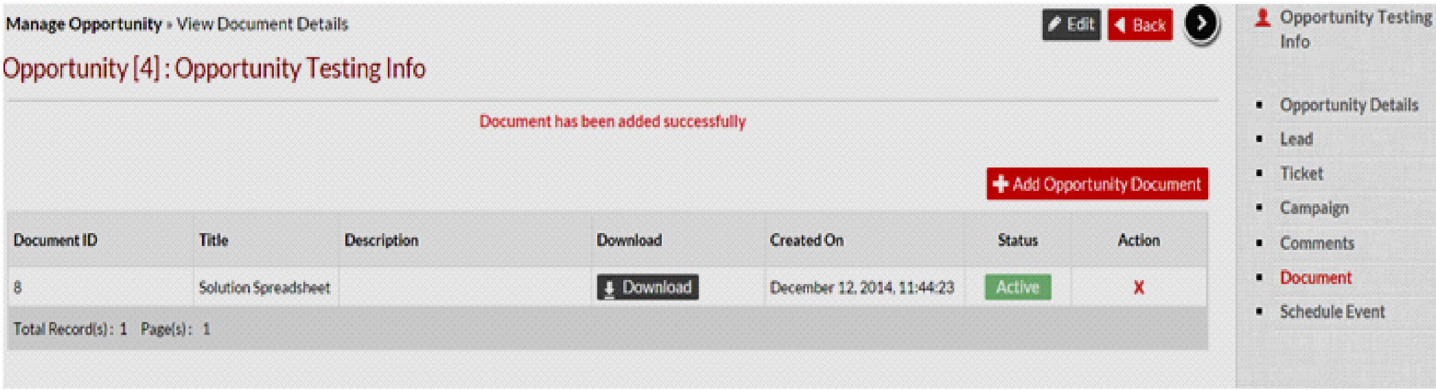
Add Documents to Lead

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



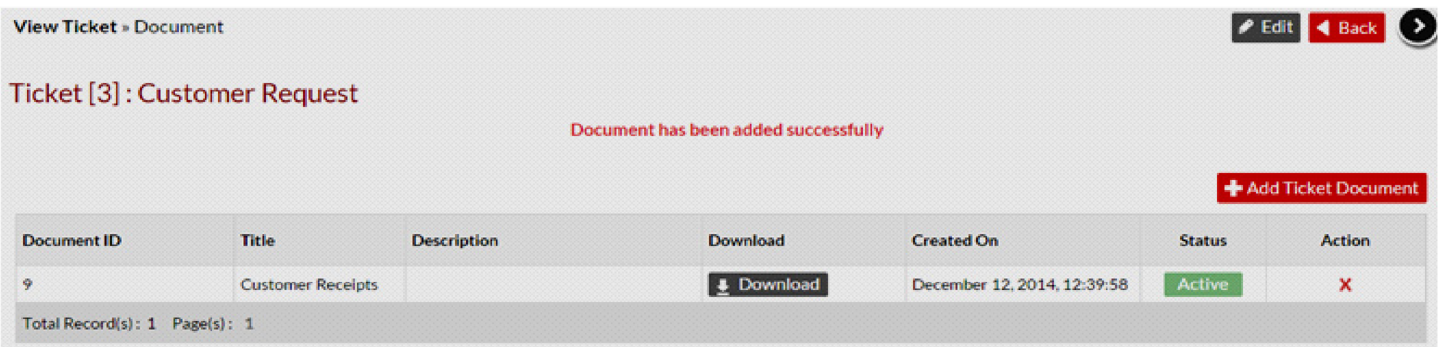
Add Documents to Opportunity

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



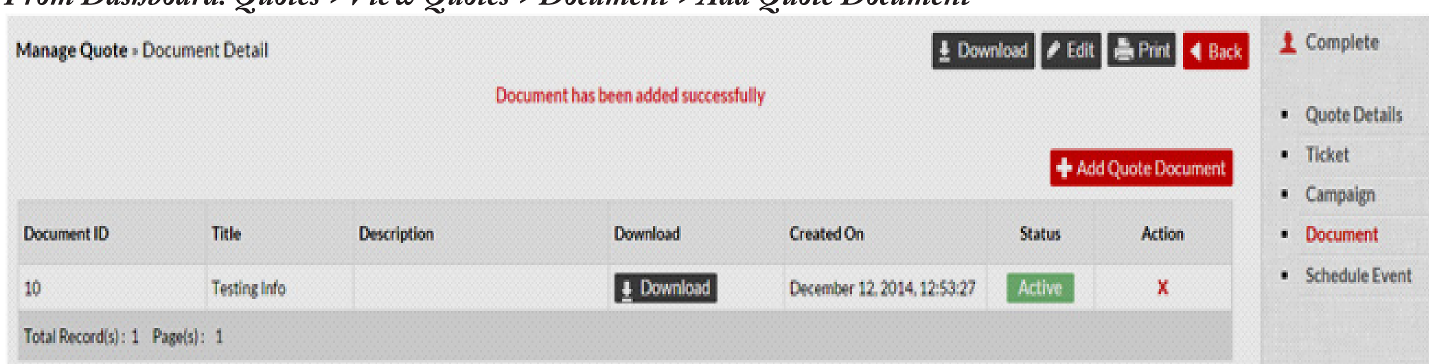
Add Documents to Ticket

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



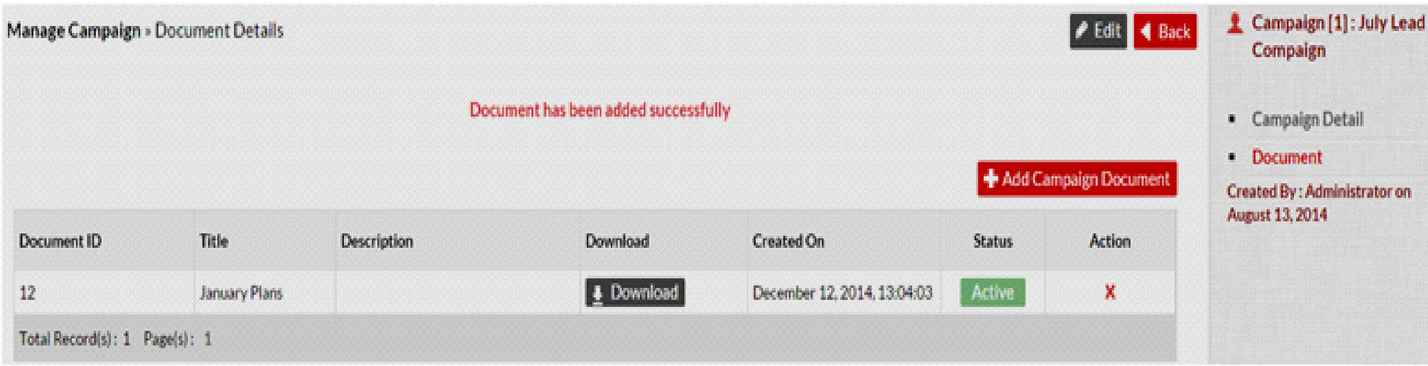
Add Documents to Quotes

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



Add Documents to Campaign

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

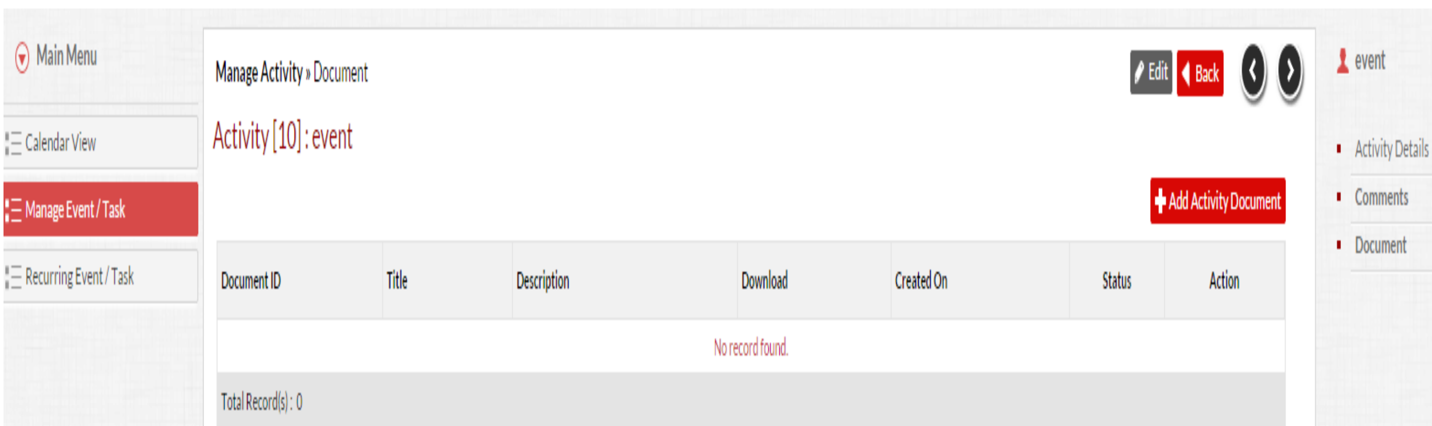


Add Documents to Event/ Task

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

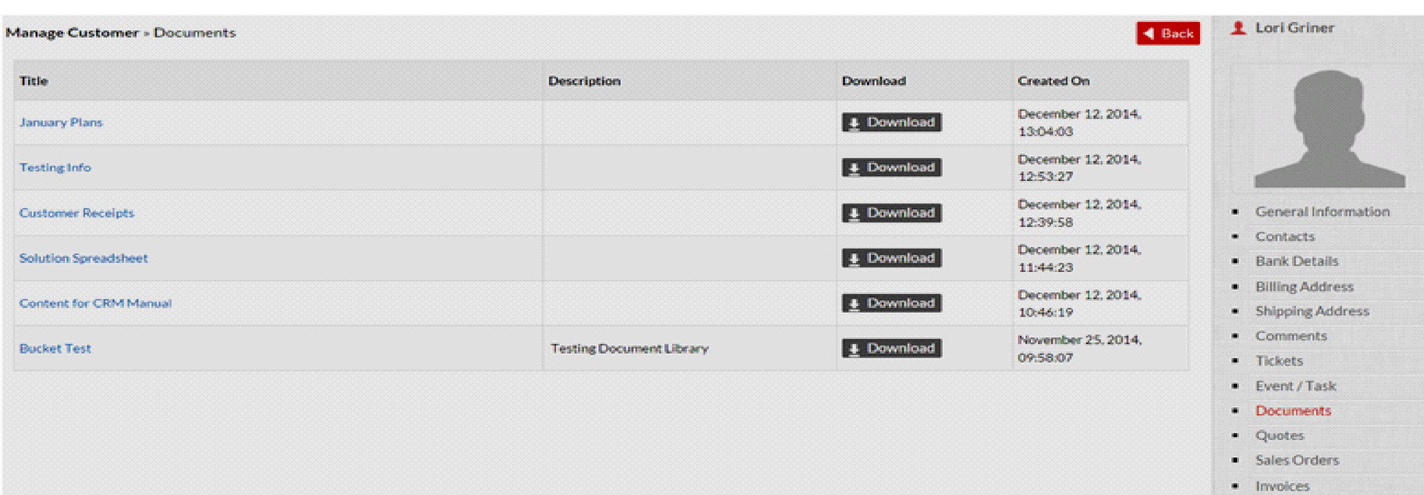
or

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



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.***

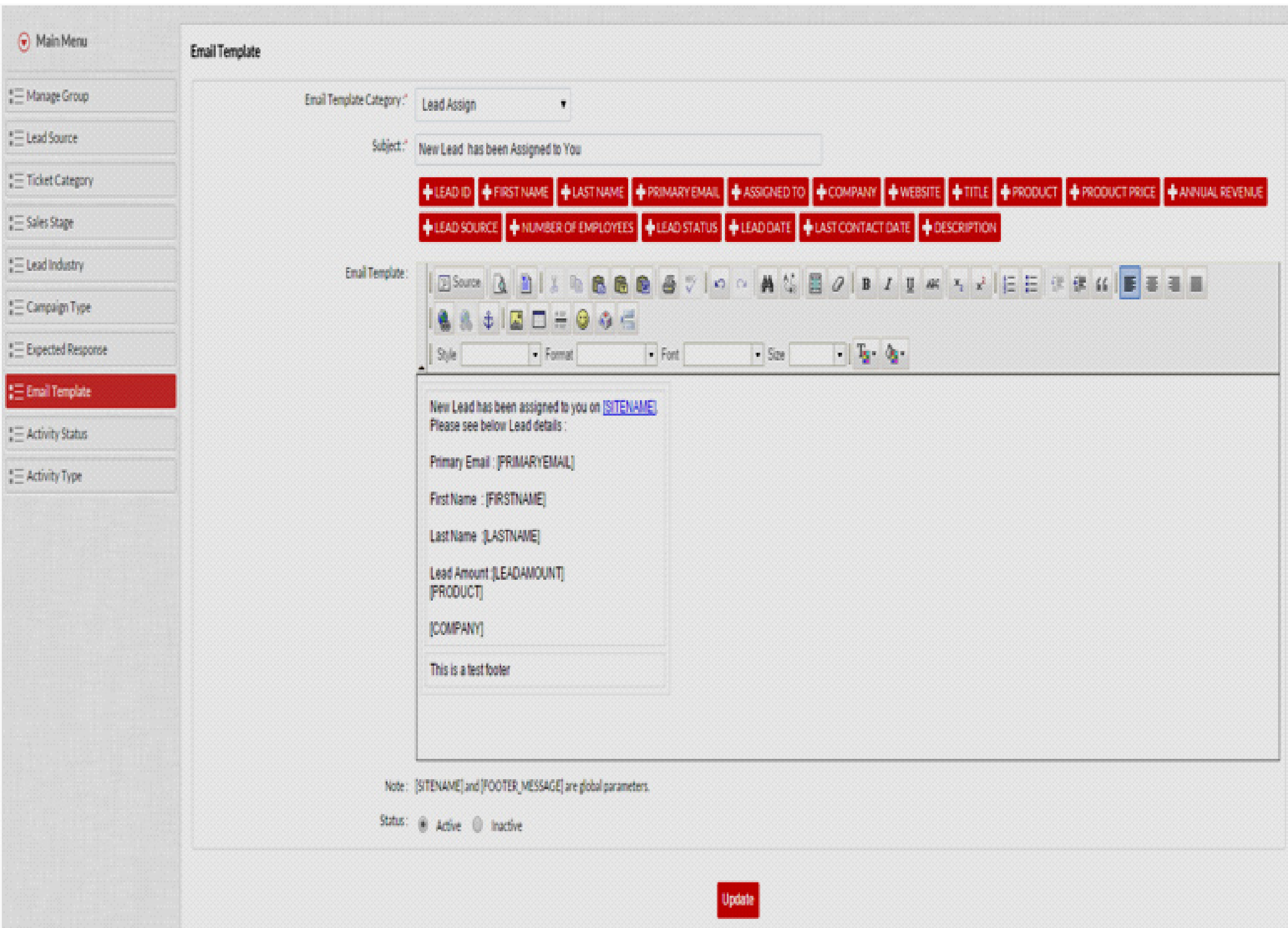


Templates

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



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.

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.

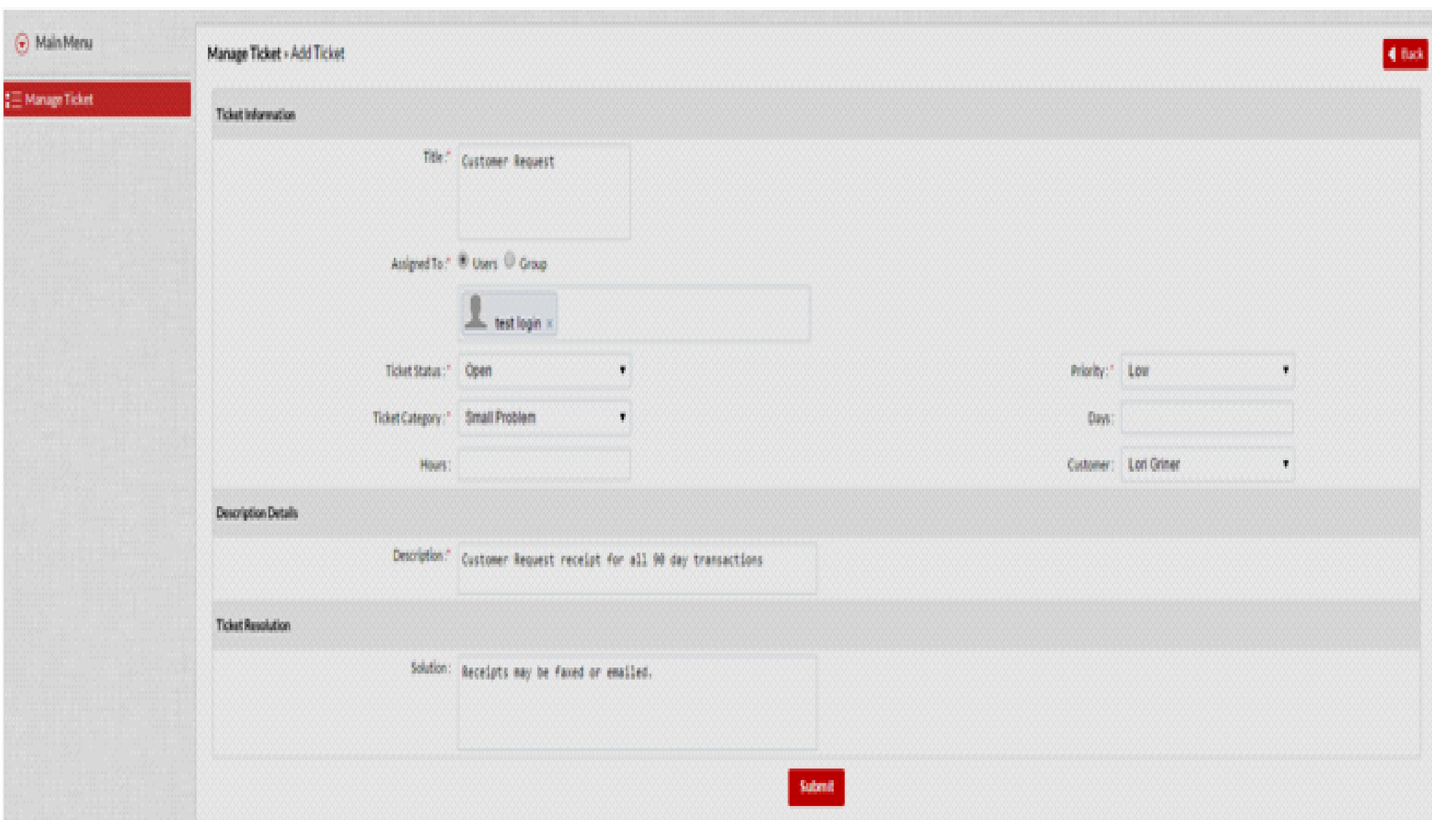
A ticket is an issue or task associated with a customer assigned to an individual or group. Tickets can be prioritized and categorized based on its importance and urgency. **Tickets** can only be created under the **Customer** and **Opportunity** modules, and can only be edited and assigned to another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

Create a Ticket

From Dashboard : Ticket > Add A Ticket

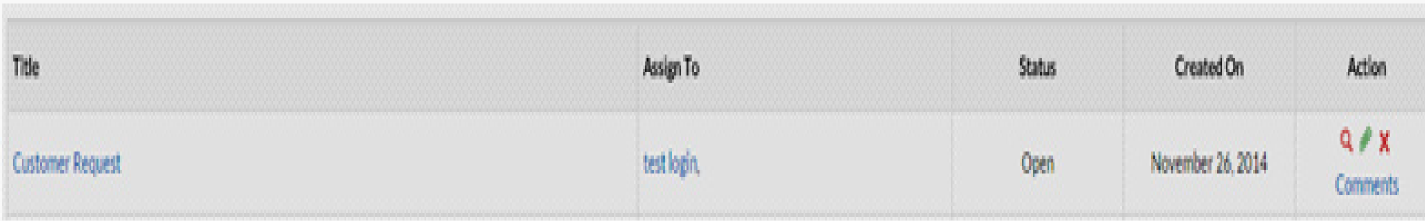
eZnet CRM allows you to keep track of your customers and best fulfill their individual needs. Creating a ticket, allows you to list products and services available for each customer. Each ticket must be assigned to an individual or group.

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.



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.



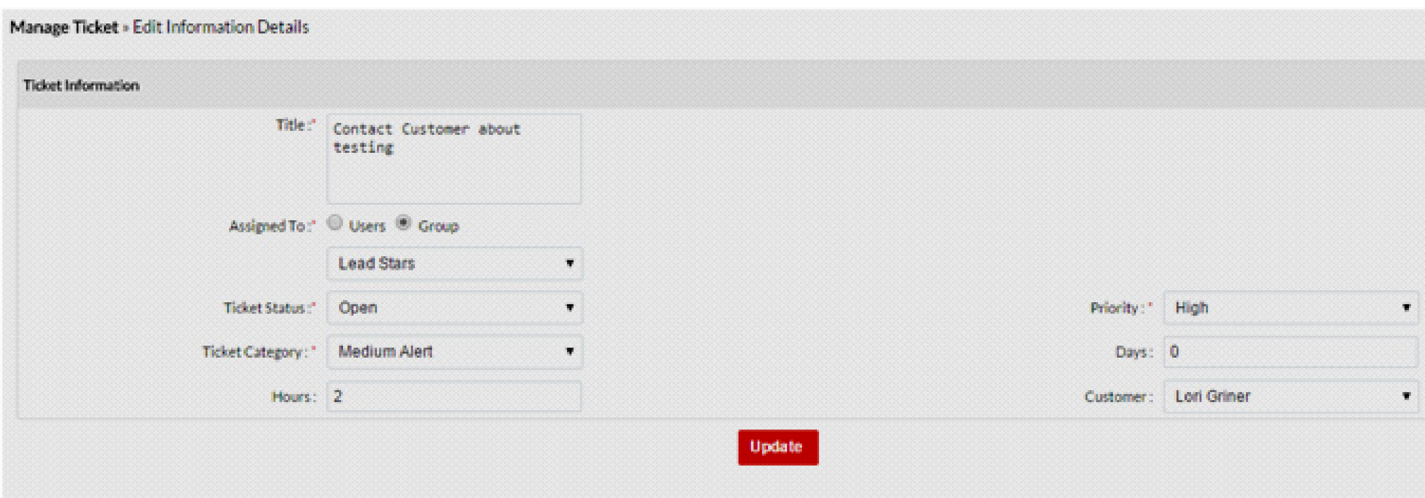
Edit Ticket

From Dashboard: Ticket > Click Ticket Title > Edit Ticket

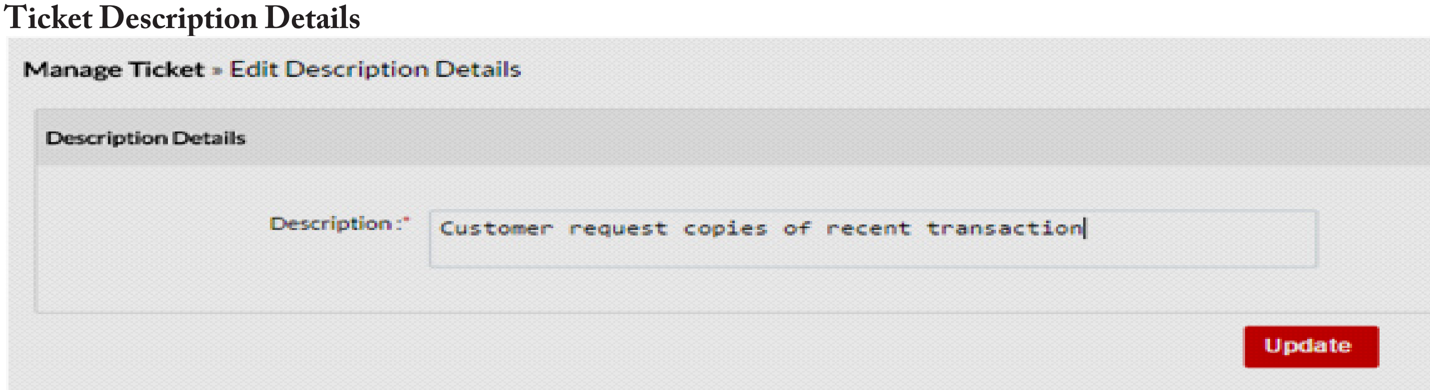
There is always an option to edit an existing ticket. You may:

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

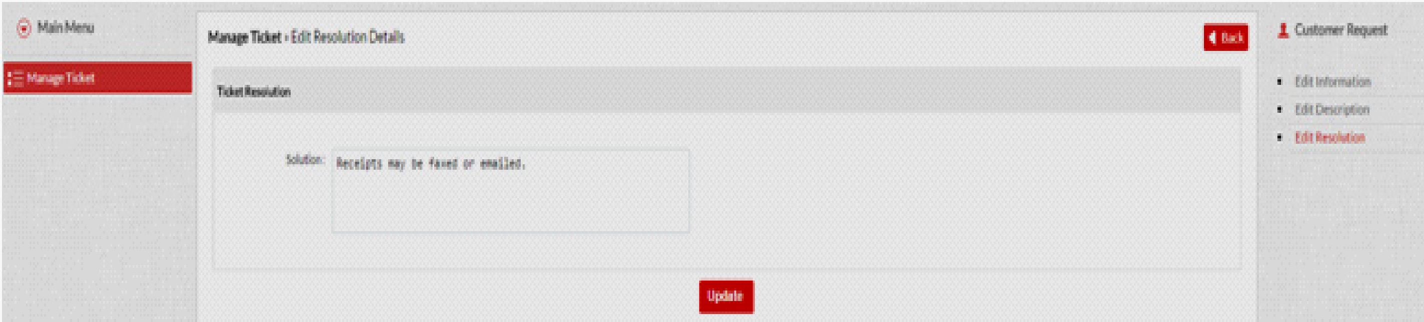
Ticket Details



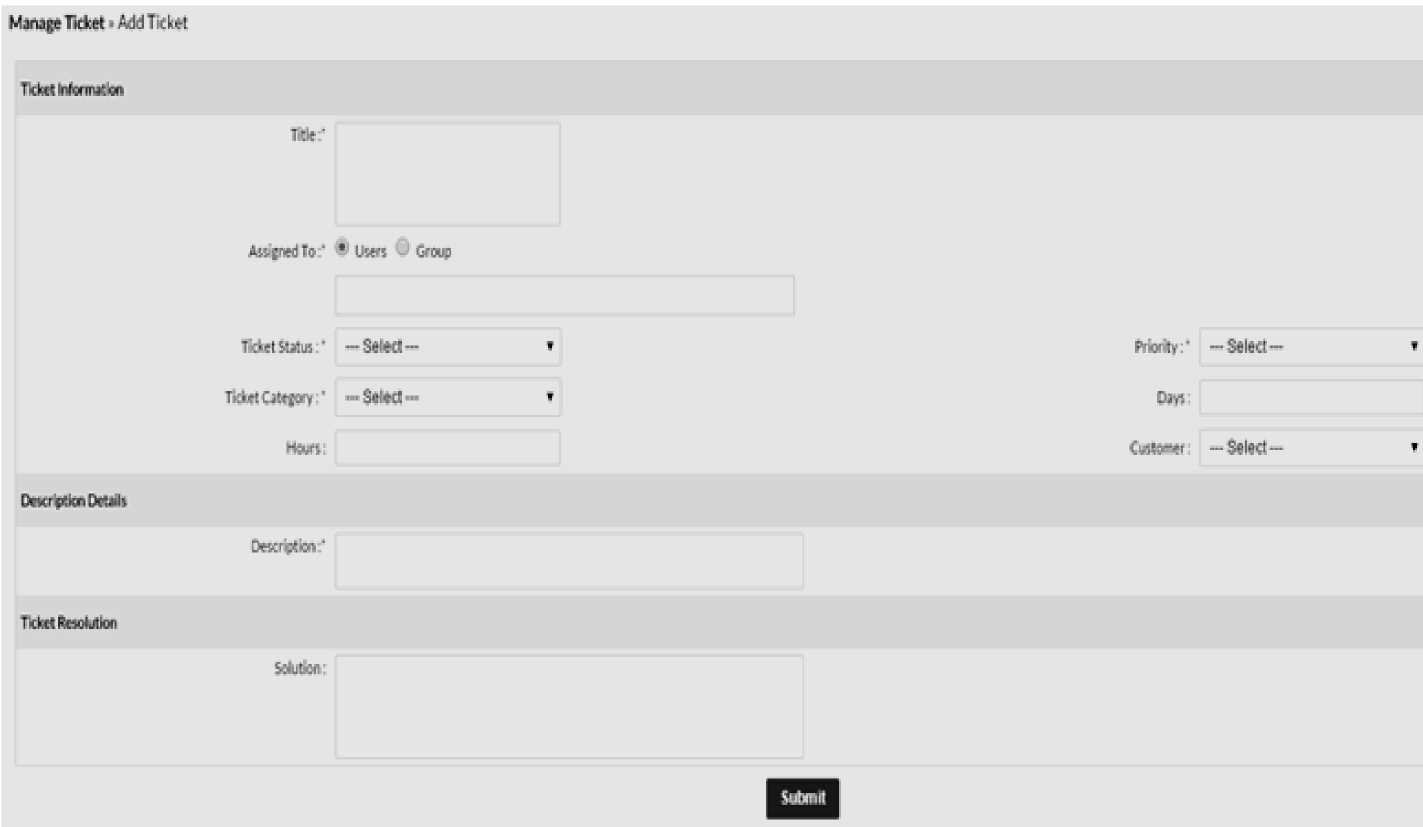
Ticket Description Details



Ticket Resolution Details



Standard Fields



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.

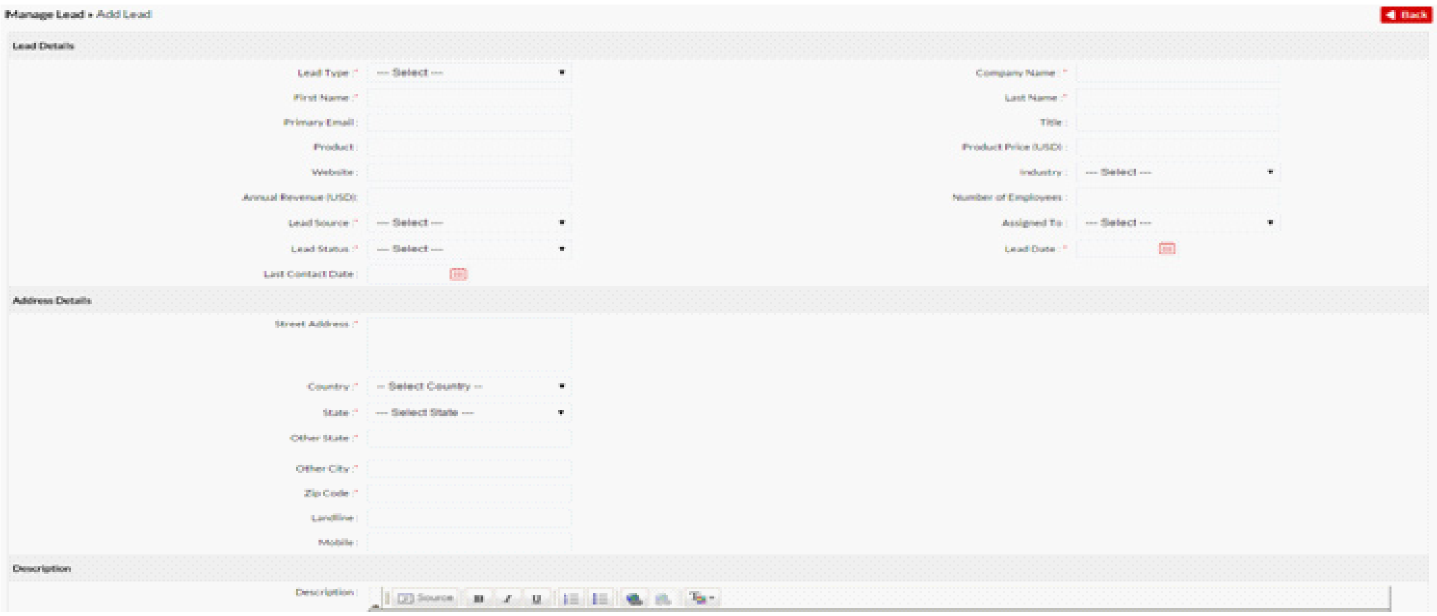
From Dashboard: Lead > Import Lead

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

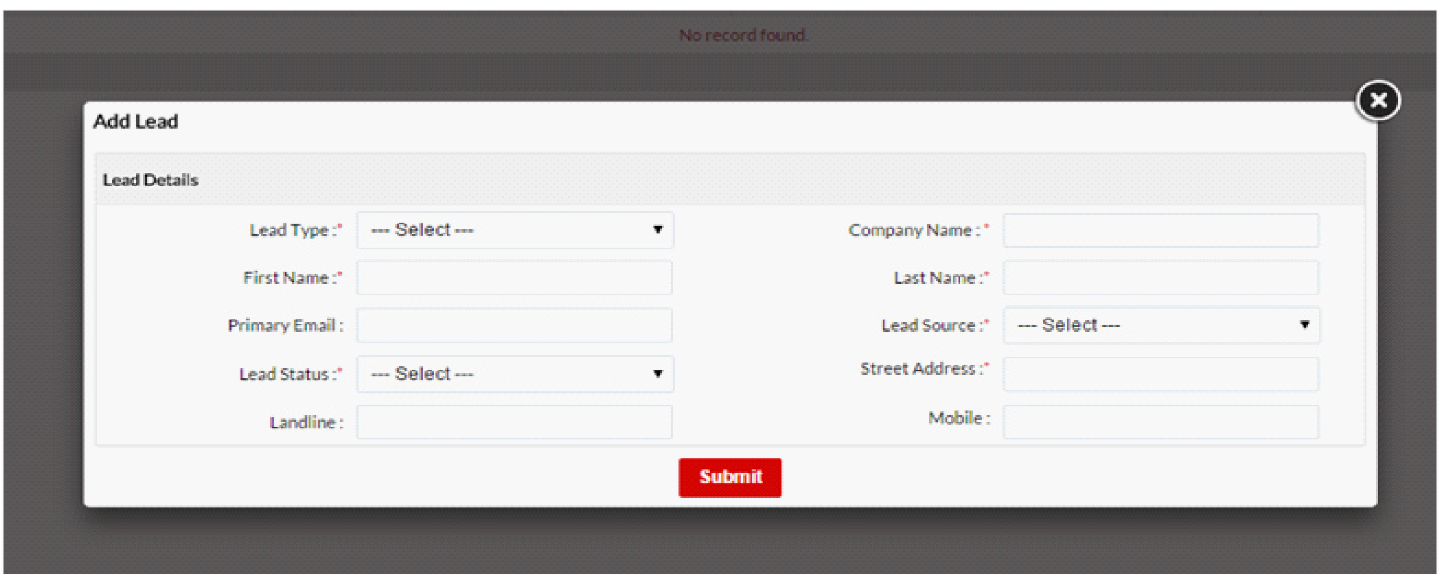
Refer to Data Administration for more about Importing and Exporting.

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.



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

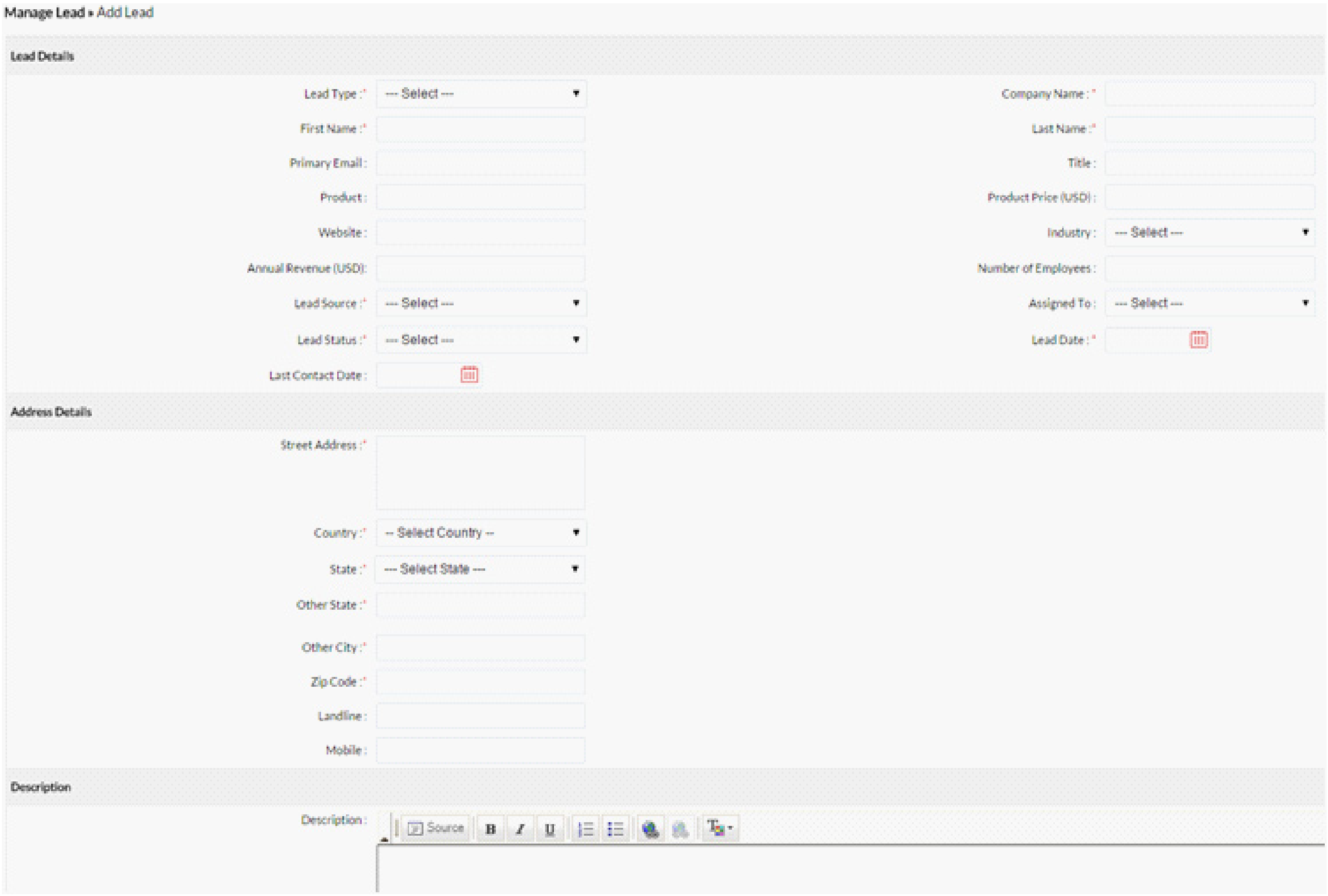


Convert Leads

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

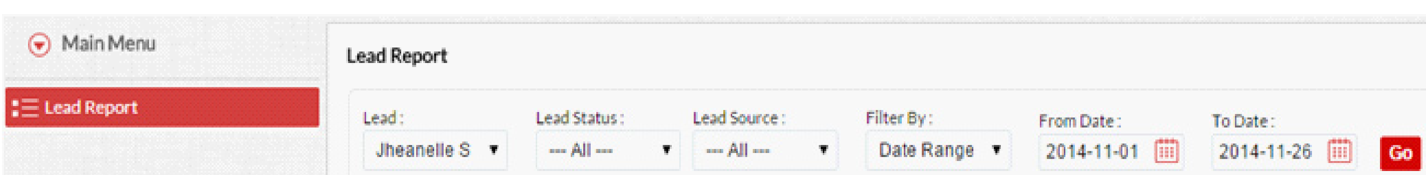
Note: When converting a lead into an opportunity, the contact deletes from the lead list.



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.

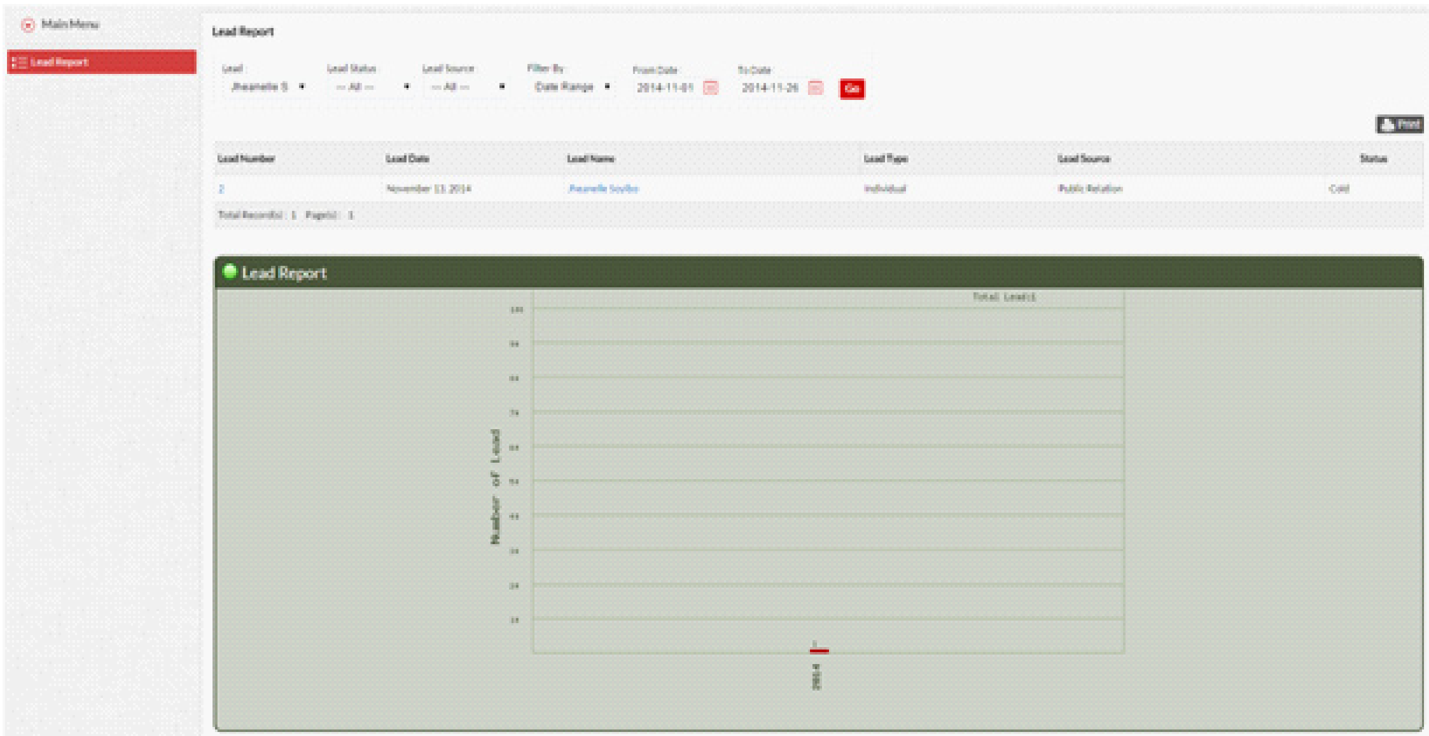
From Dashboard : Report > Lead Report



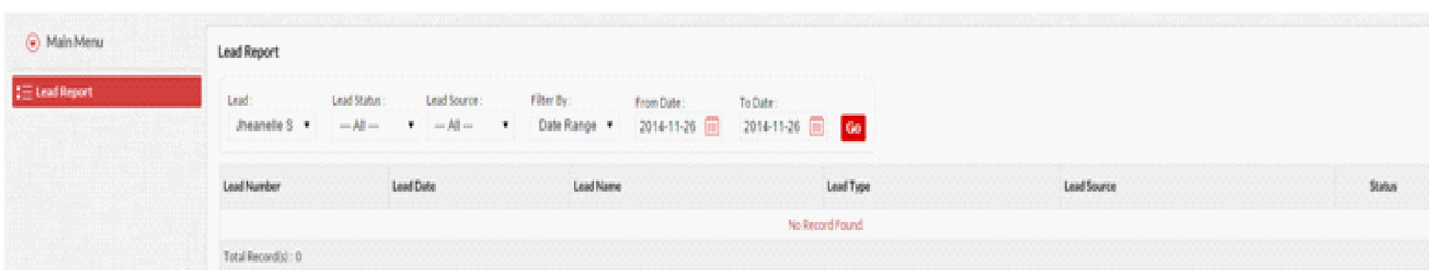
Note: Dates are mandatory to generate the lead report.

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.

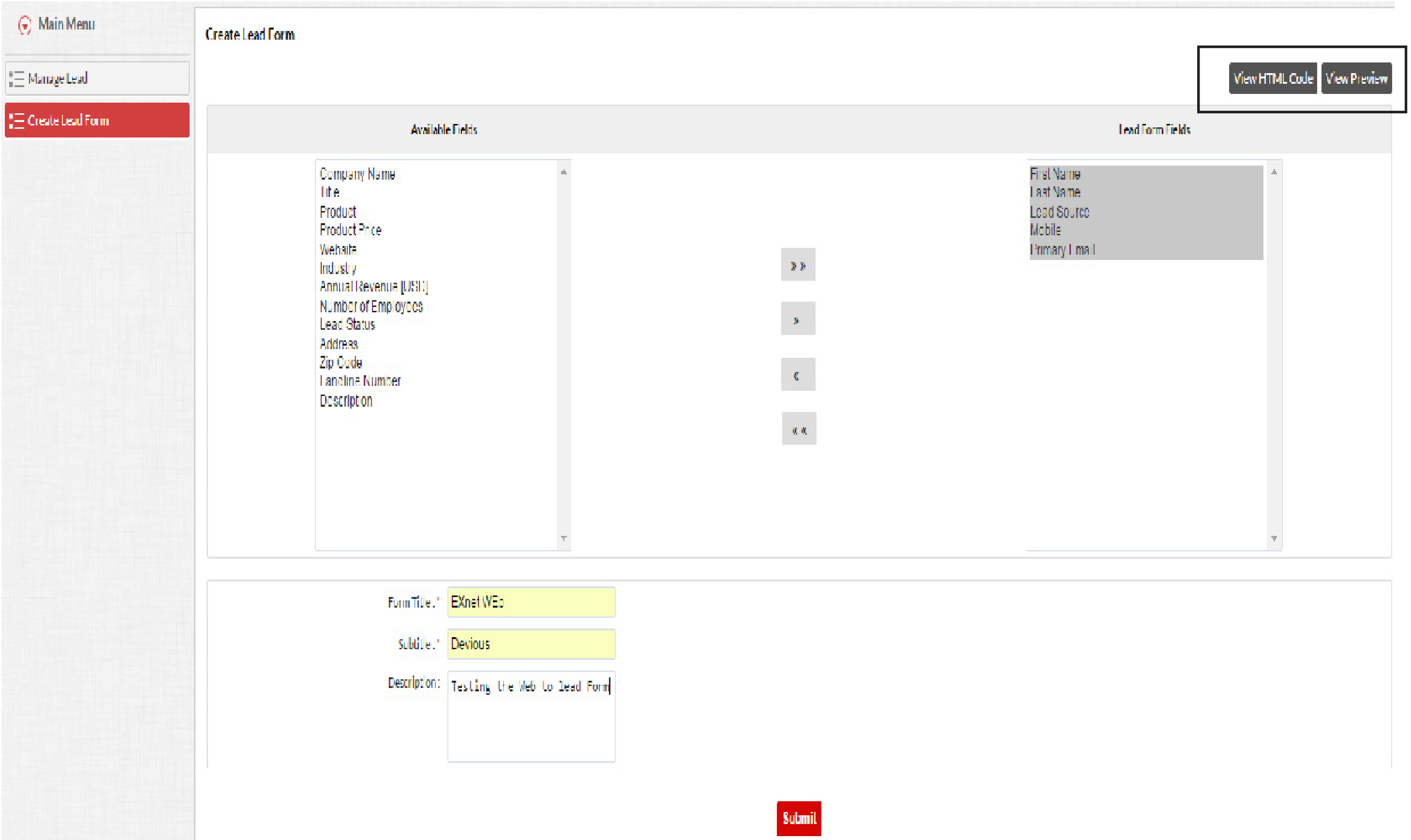


Instead, the screen displays "No Record Found" as seen below. To correct this issue, adjust the various criteria until graph is shown with the desired results.

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

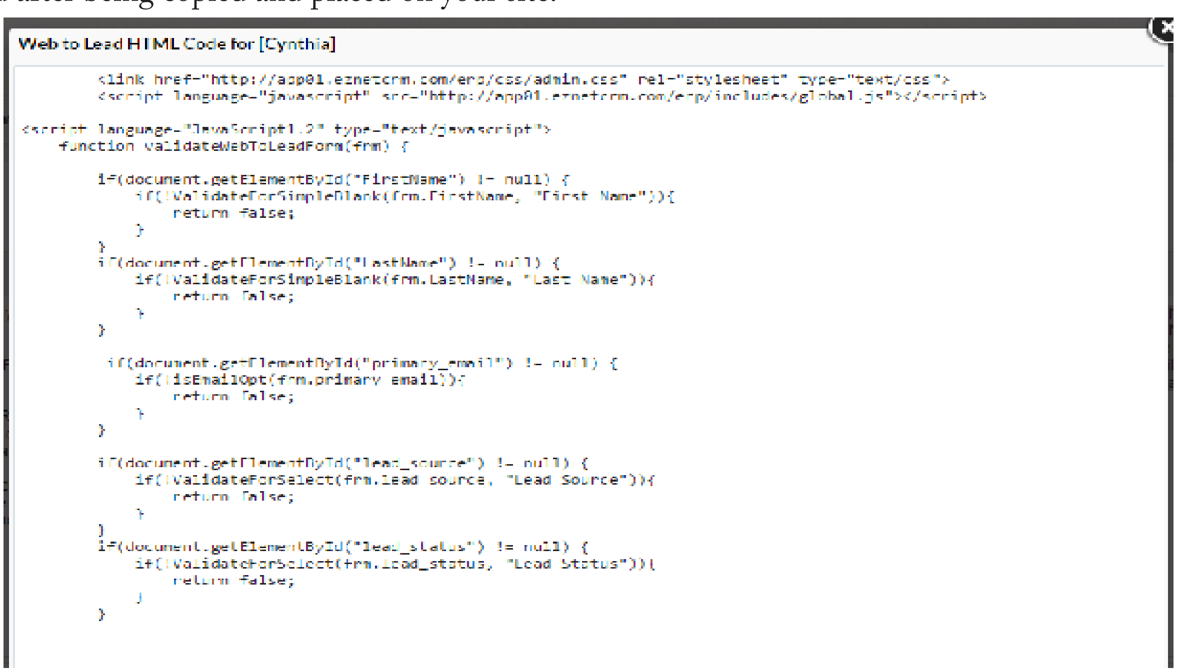


 - transfers all the Available fields

 - 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.

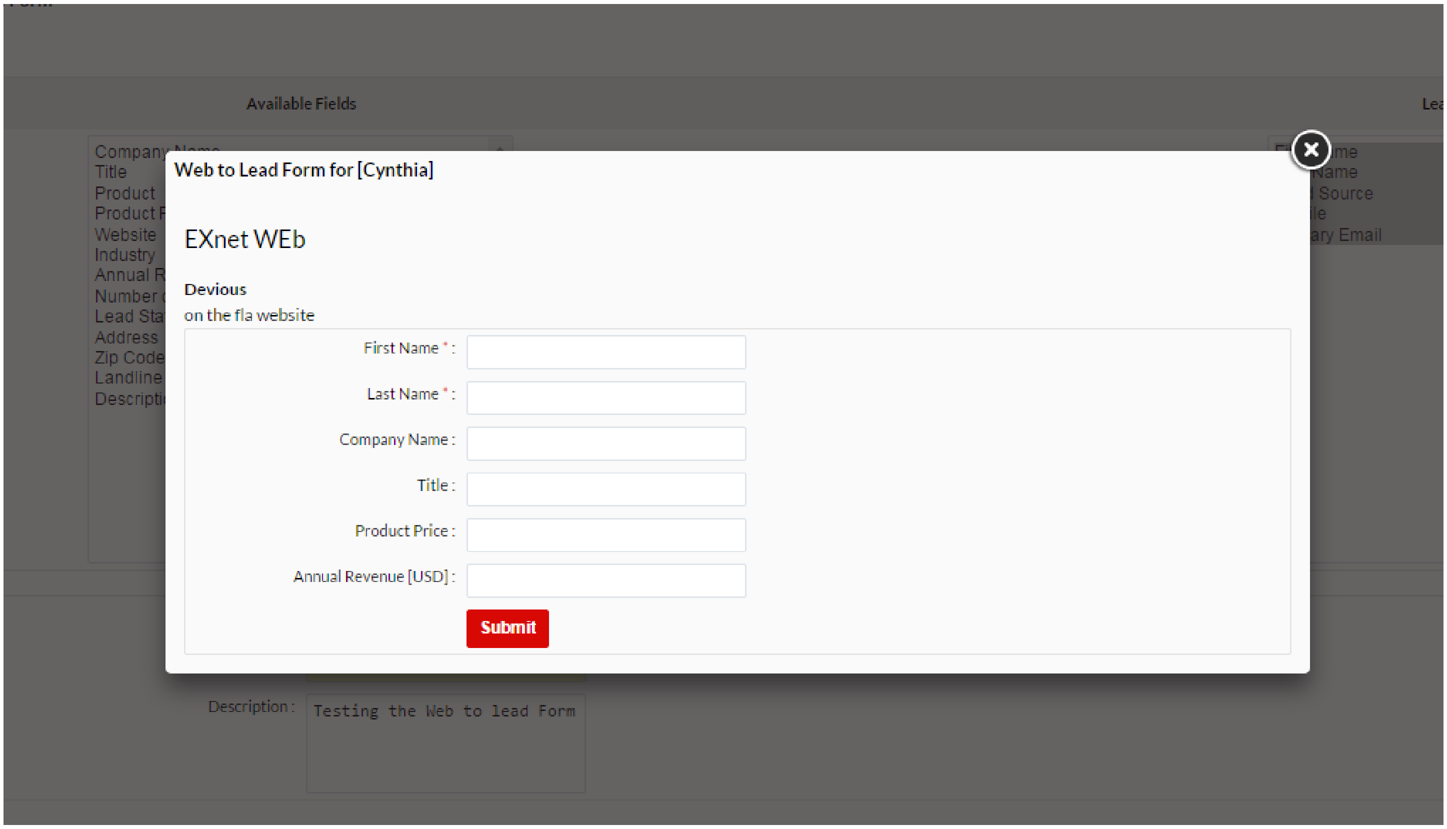
To view the HTML code, choose the option and a code will generate as seen in the photo below. The code can only be edited after being copied and placed on your site.



Web to Lead HTML Code for [Cynthia]

```
        <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.



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.

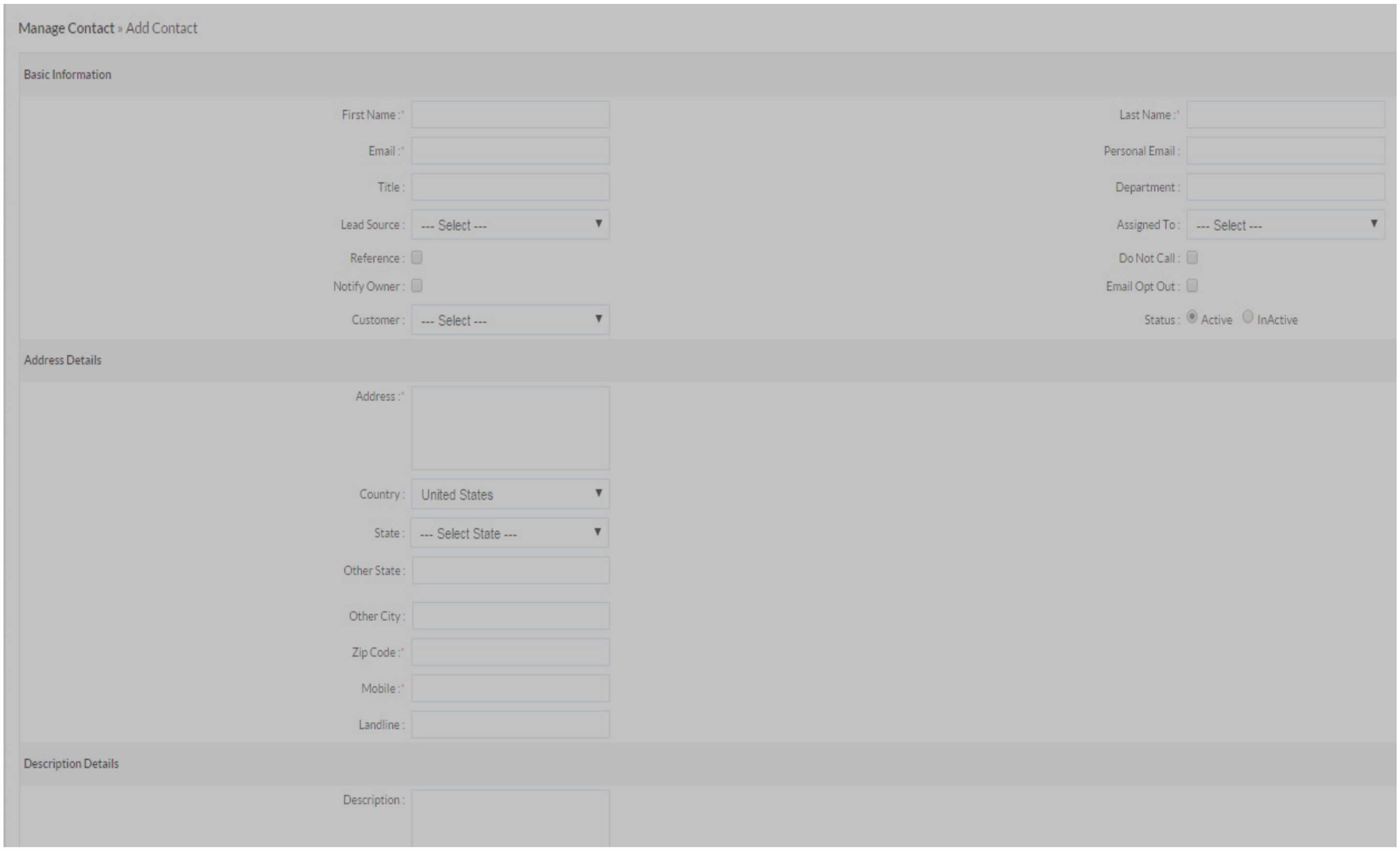
Add Customer

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.

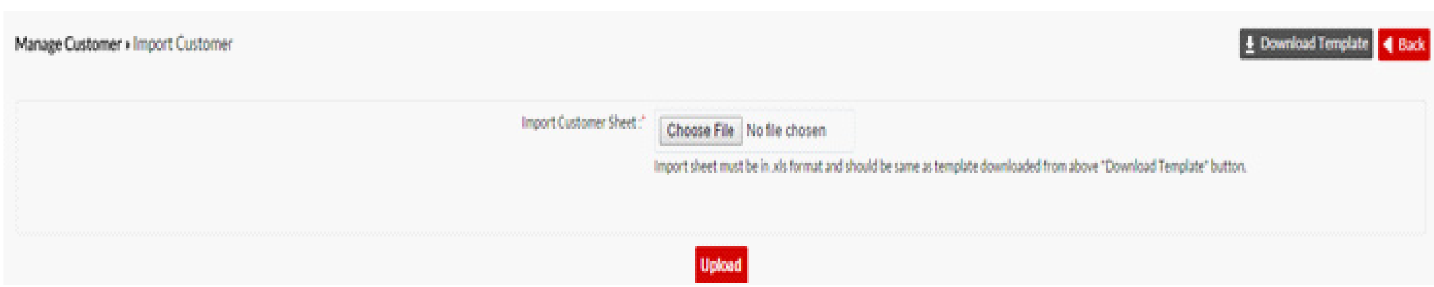
Standard Fields



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



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

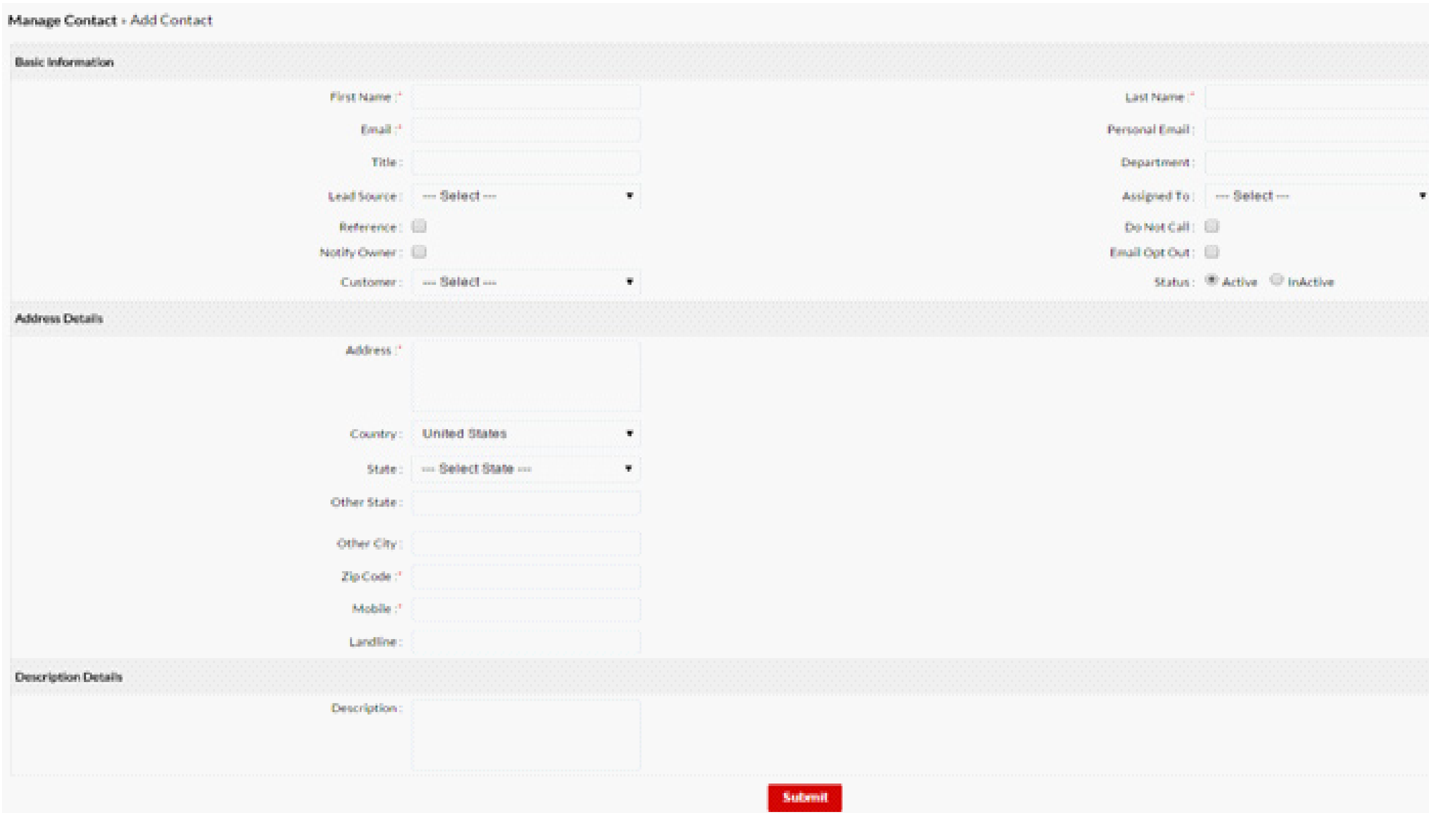
Contacts

Contacts are individuals within the organization you are communicating with.

Create Contact

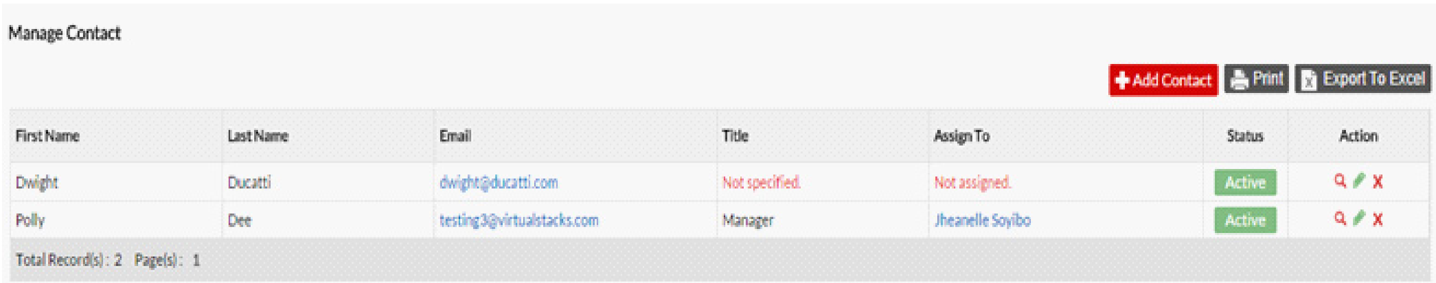
To create a contact in eZnet CRM, manually input the basic information of the contact. You can choose to categorize them under a particular company and assign their file to another user.

From Dashboard: Contact > Add Contact



Contact List

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

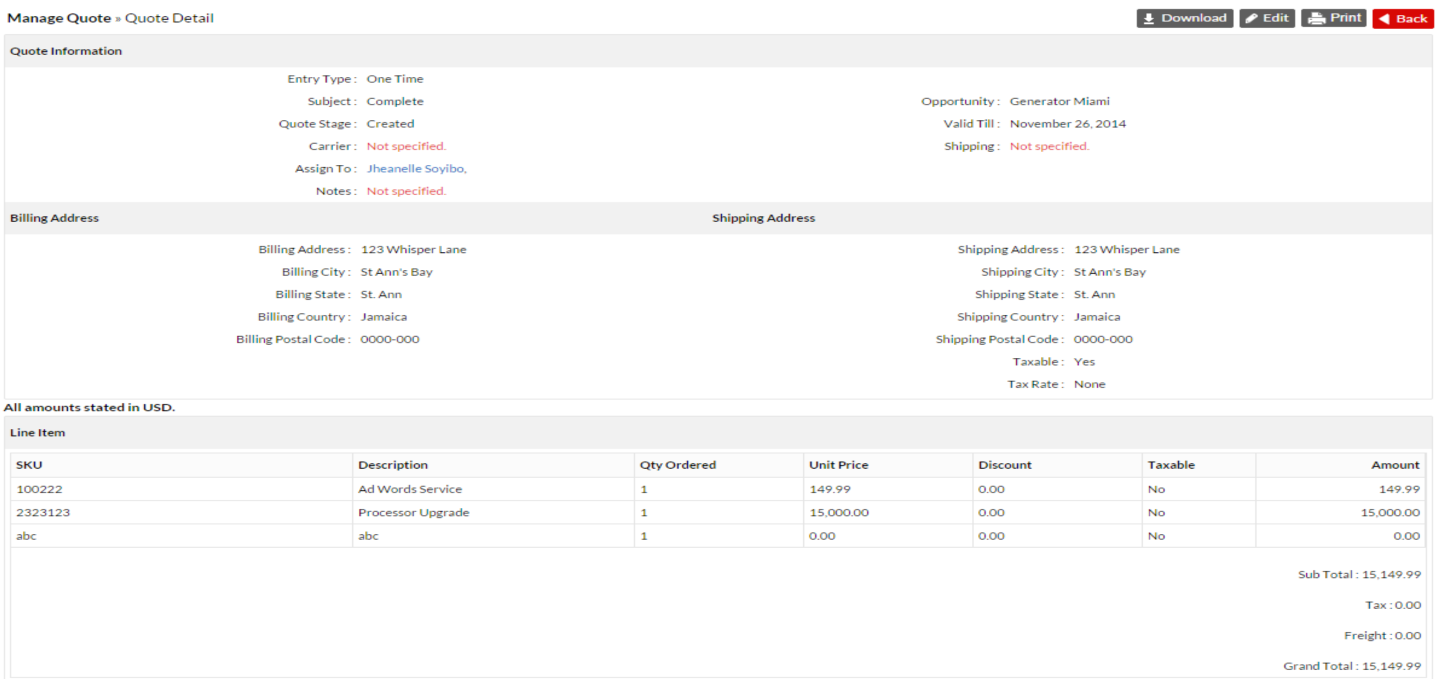


Quotes

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

Create Quotes

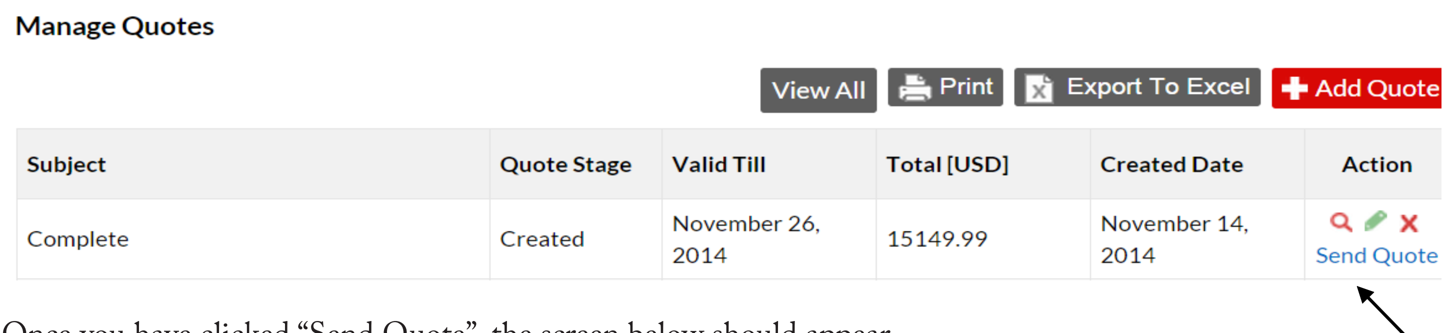
Effectively track and manage quotes for customers by creating a quote in eZnet CRM. However, you must ensure there are items listed and priced in the **ITEM MASTER**. To generate accurate quotes once or on a recurring basis, input the required fields indicated by * asterisks.



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.

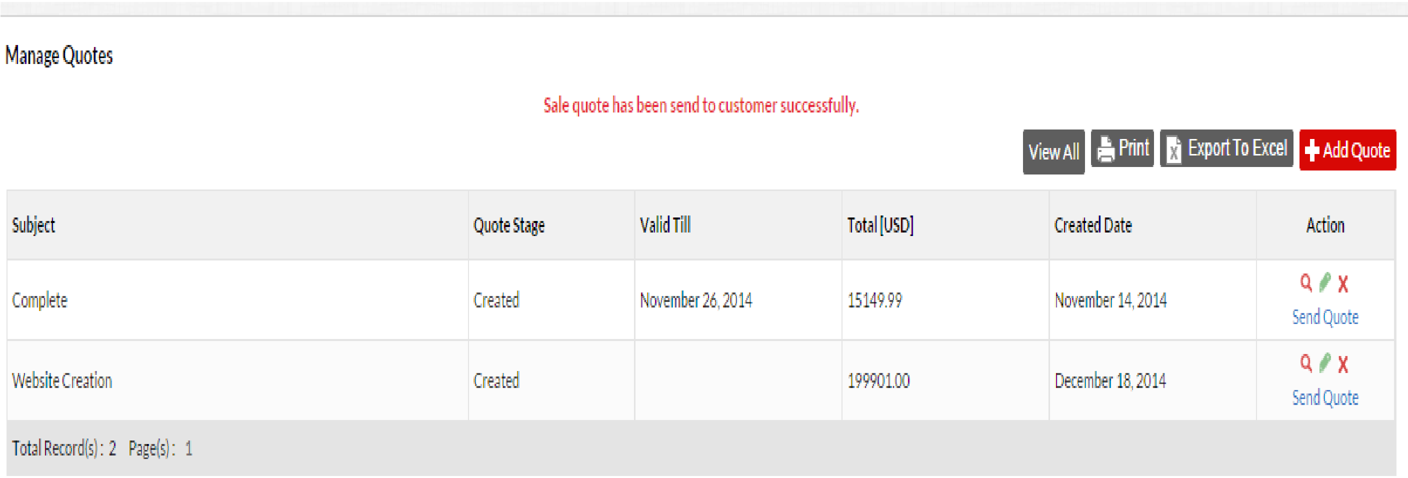
In the event that a customer requests a copy of the quote, you may send the details and other related documents via email by selecting the "Send Quote" feature displayed in the photo below.



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

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

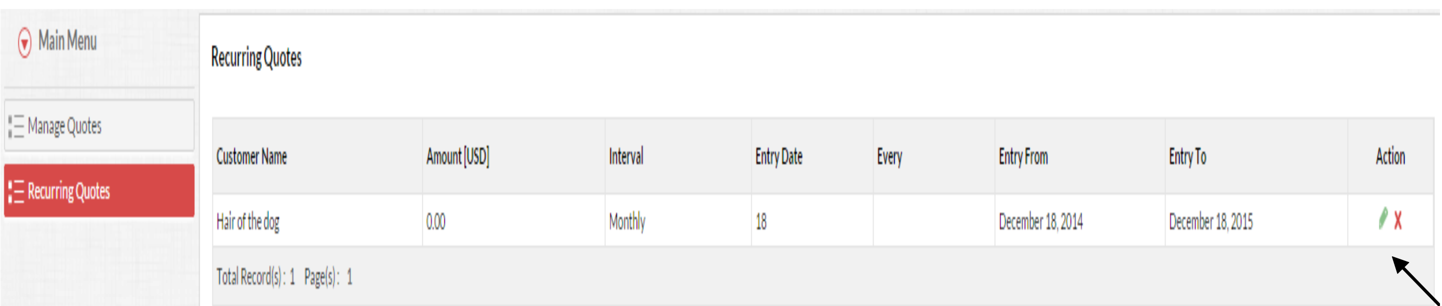
Emails can be sent to a customer already listed in CRM and may be carbon copied (cc) to recipients outside of the CRM system.



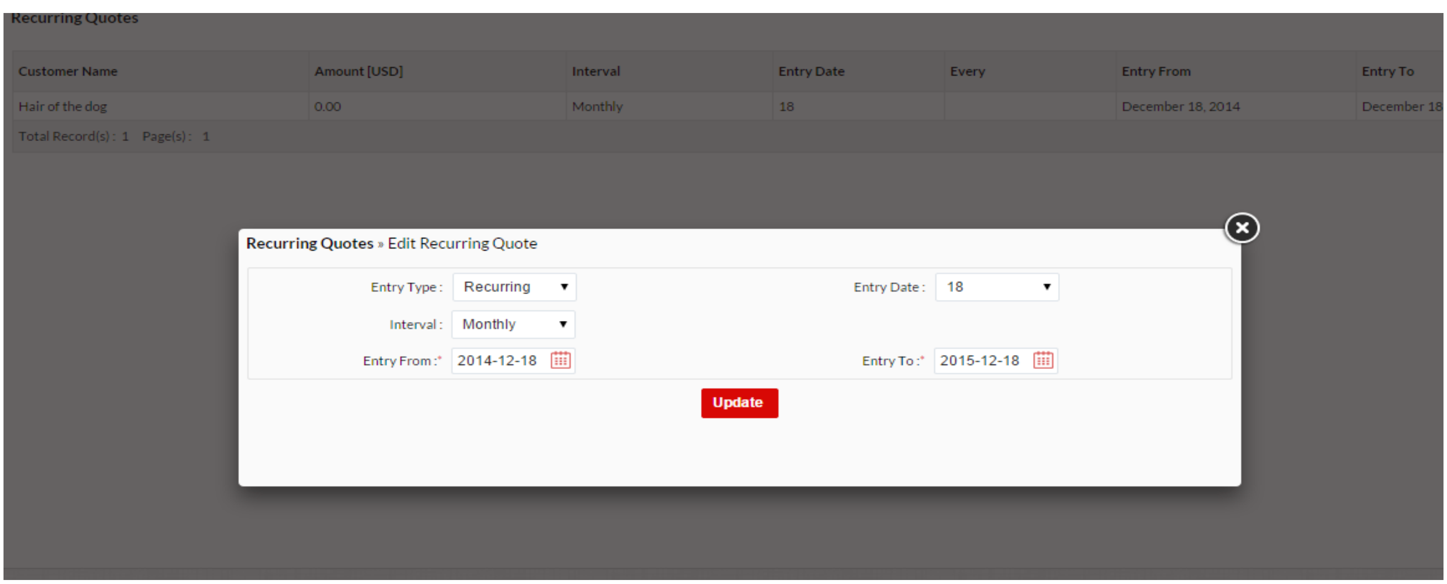
Cancel or Edit Recurring Quotes

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**.

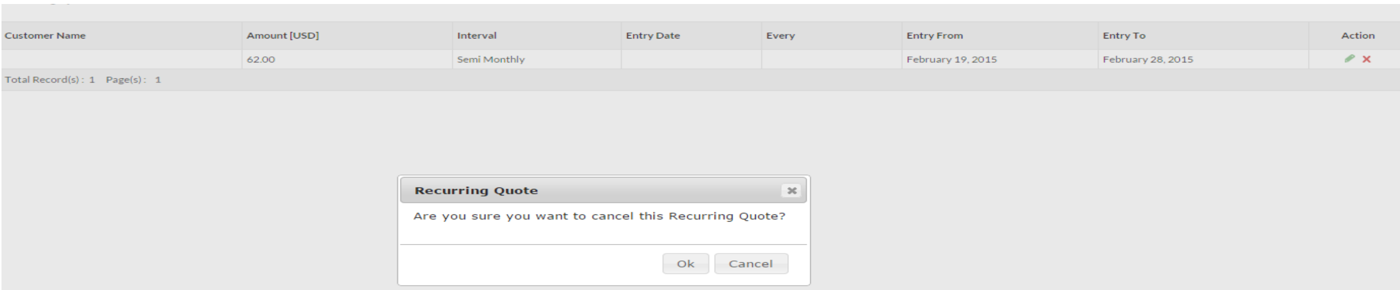


Select an action Icon to edit and the screen below will appear.



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.

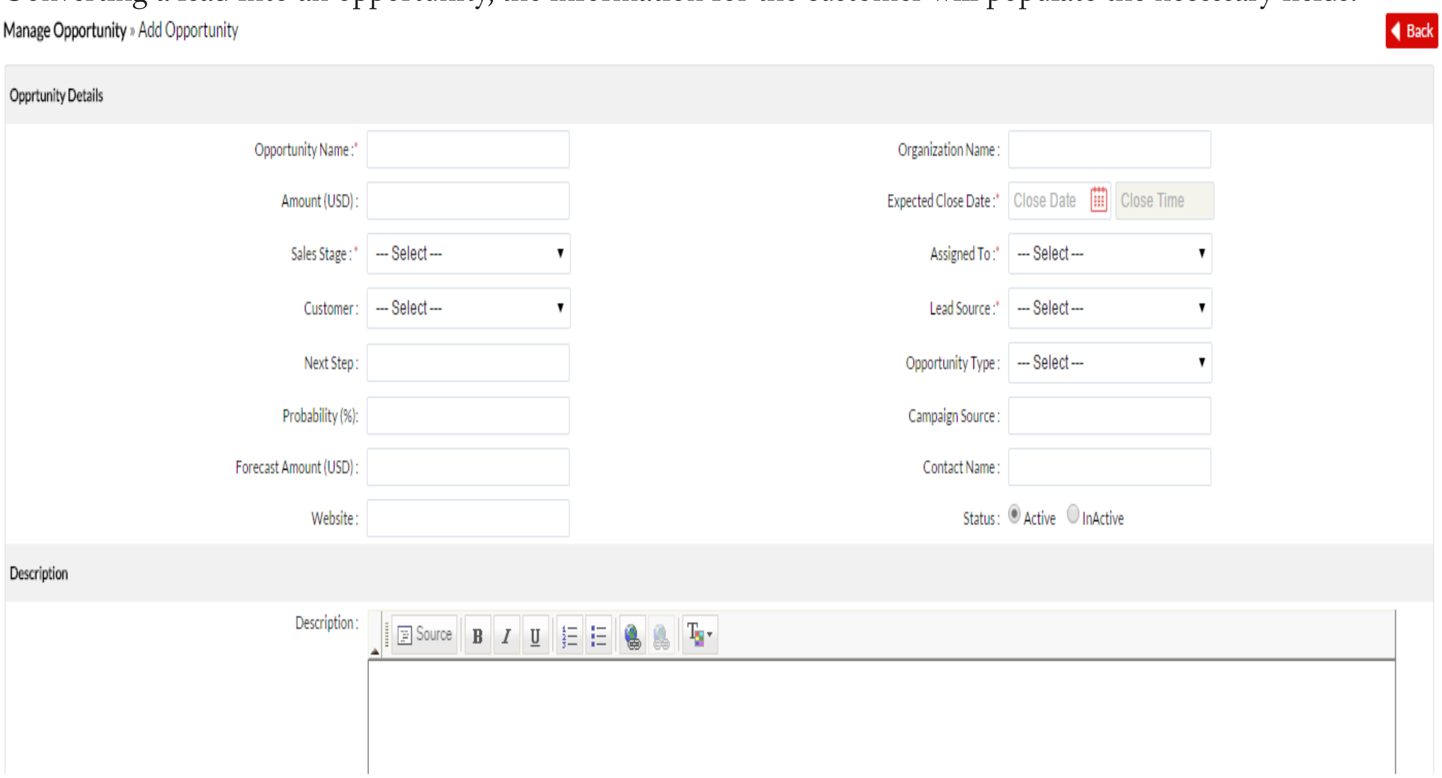
Create Opportunities

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.

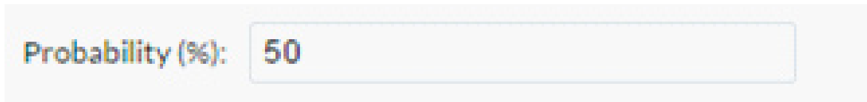
From Dashboard: CRM > Opportunity > Add Opportunity

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

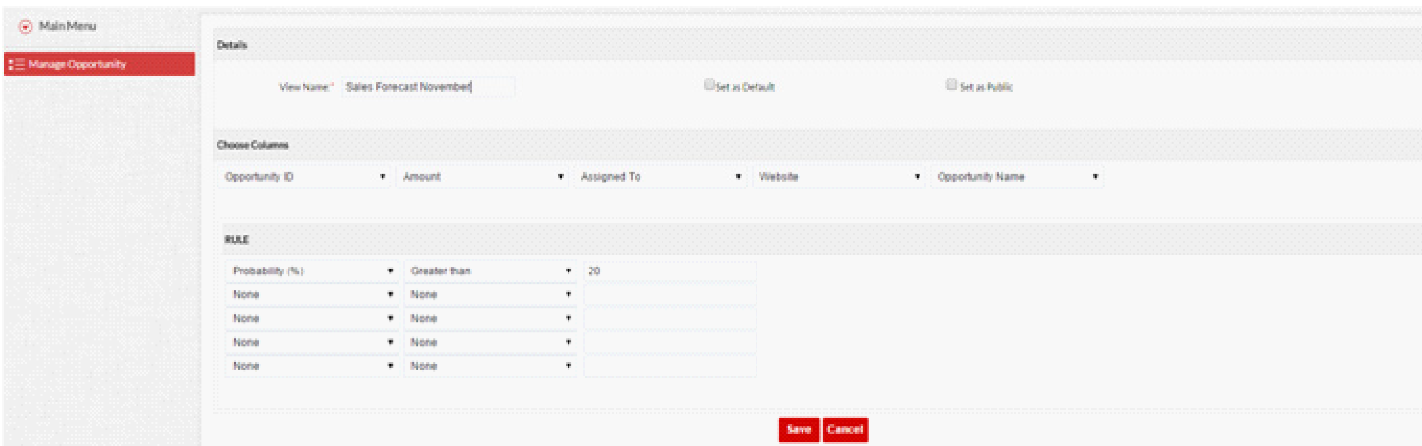


Probability

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.



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.

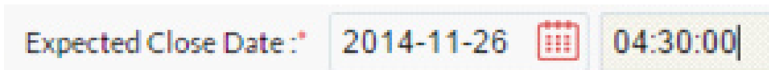


Note: CRM does not allow duplicate columns or rules.

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

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.



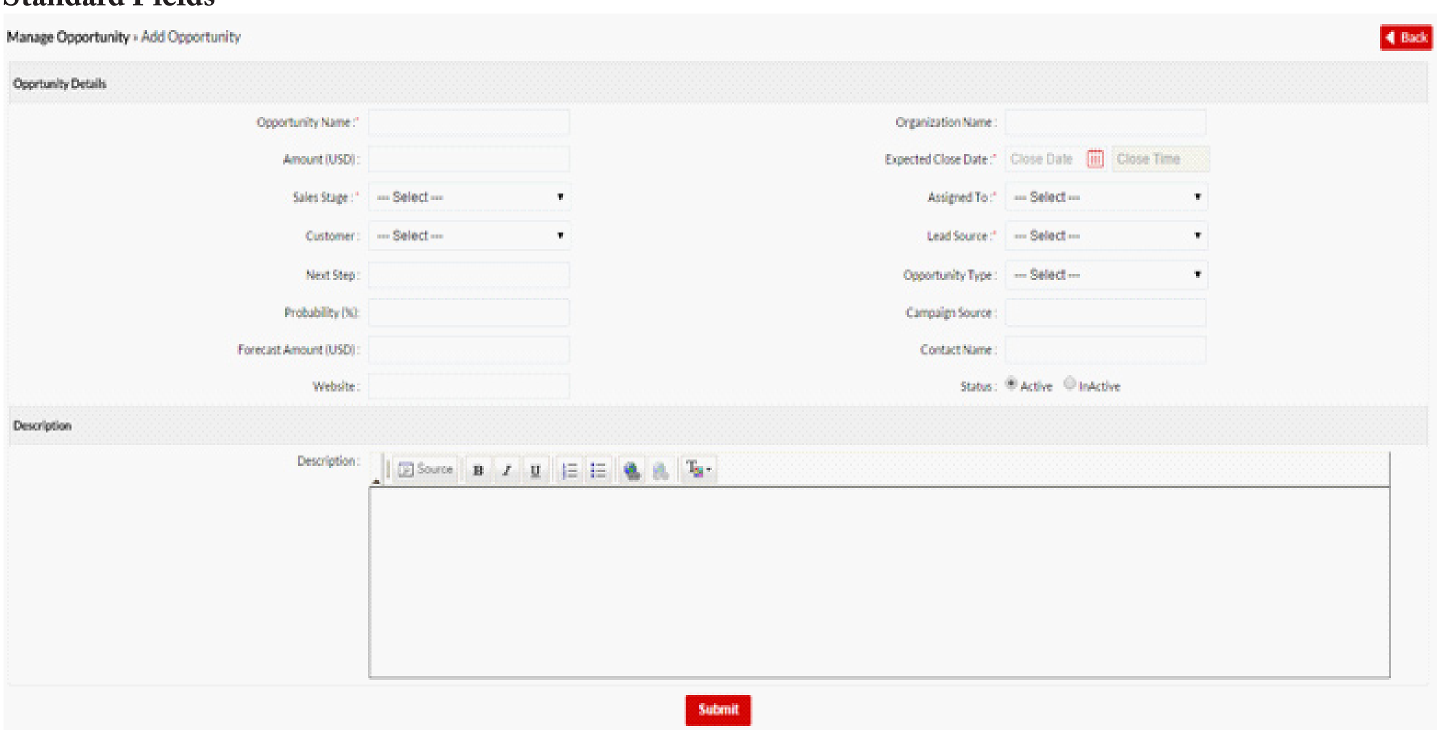
Closing

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.

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



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.

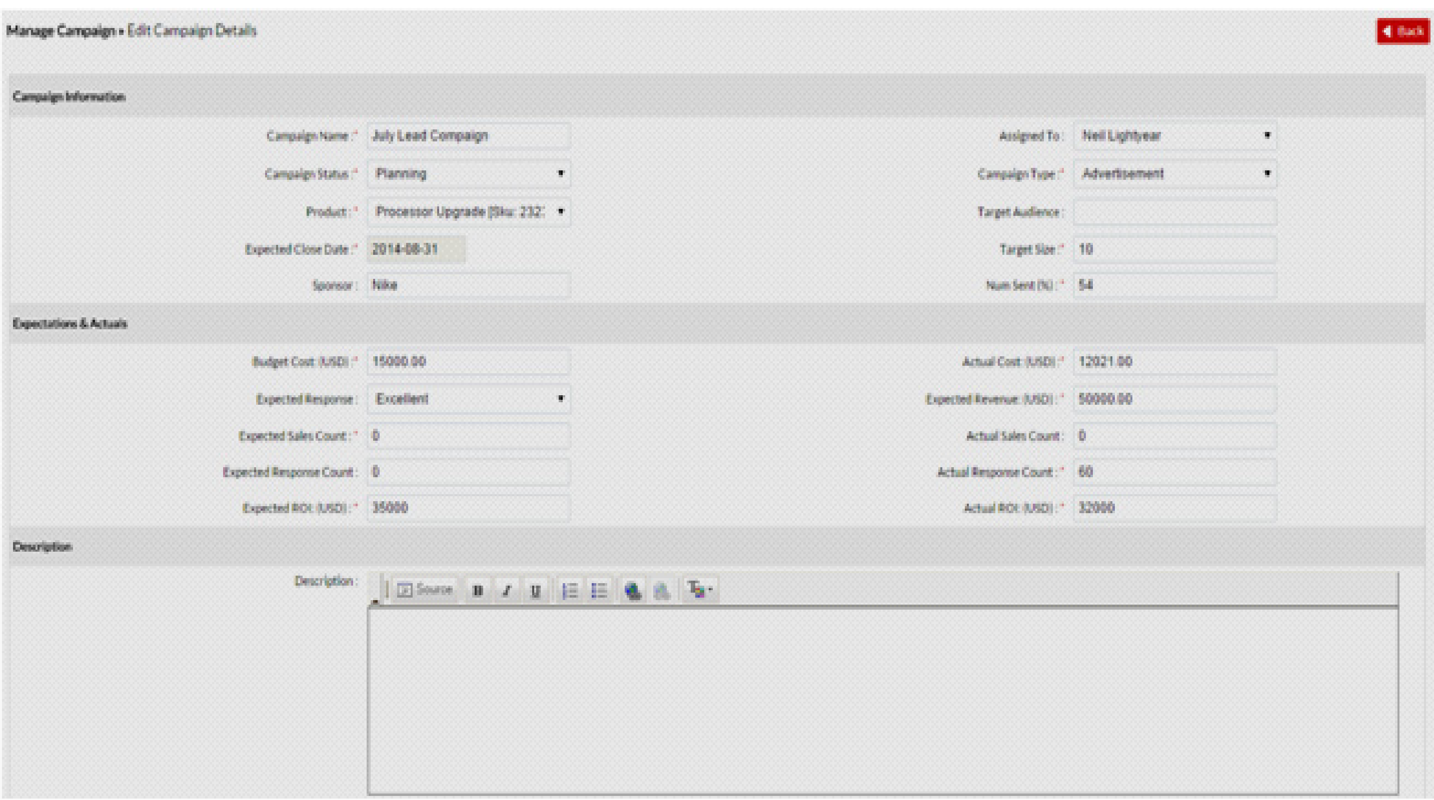
With eZnet CRM campaign management features, you can effectively plan marketing expenses and improve the quality of the lead generation process. Campaign management integrates leads and opportunities to help your organization measure campaign performance and effectiveness.

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.



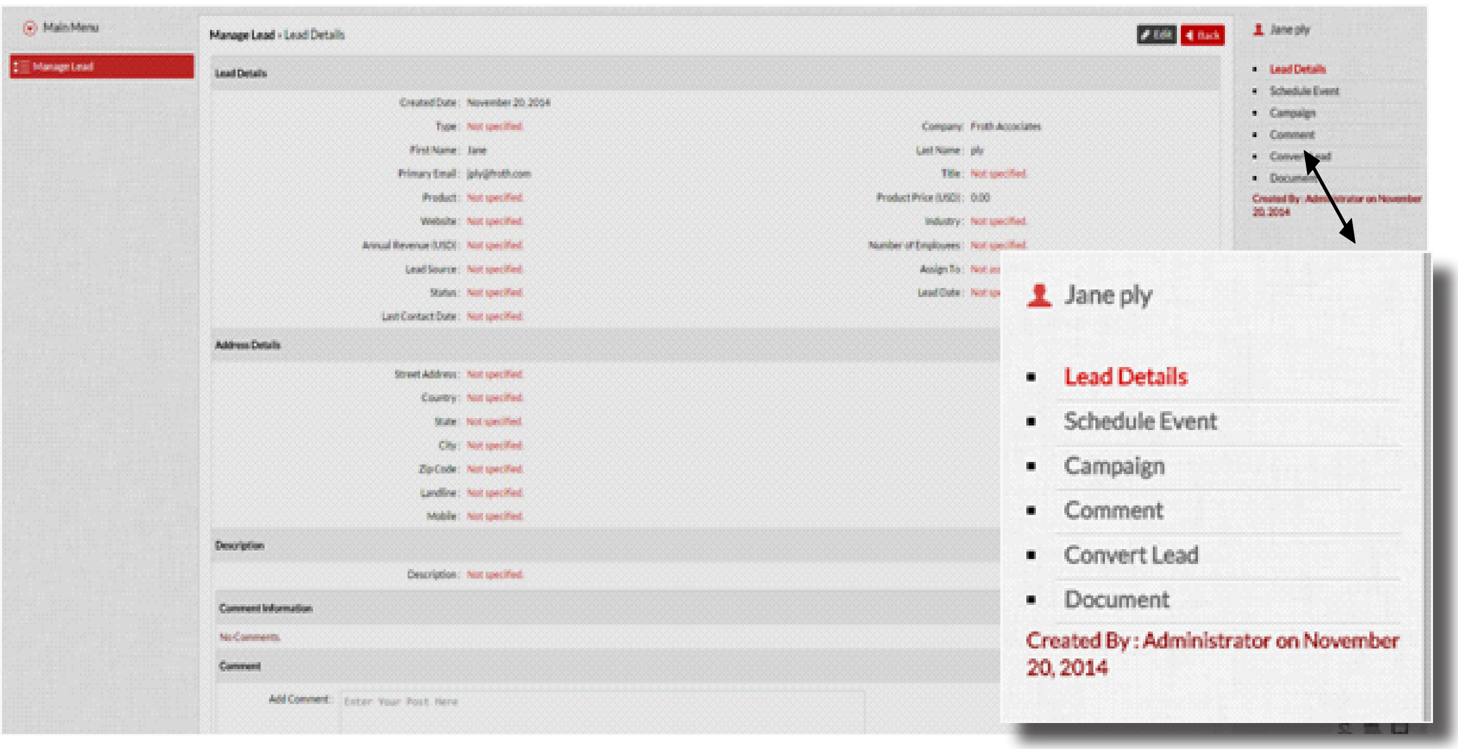
Add Campaign to Lead, Quote & Opportunity

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.

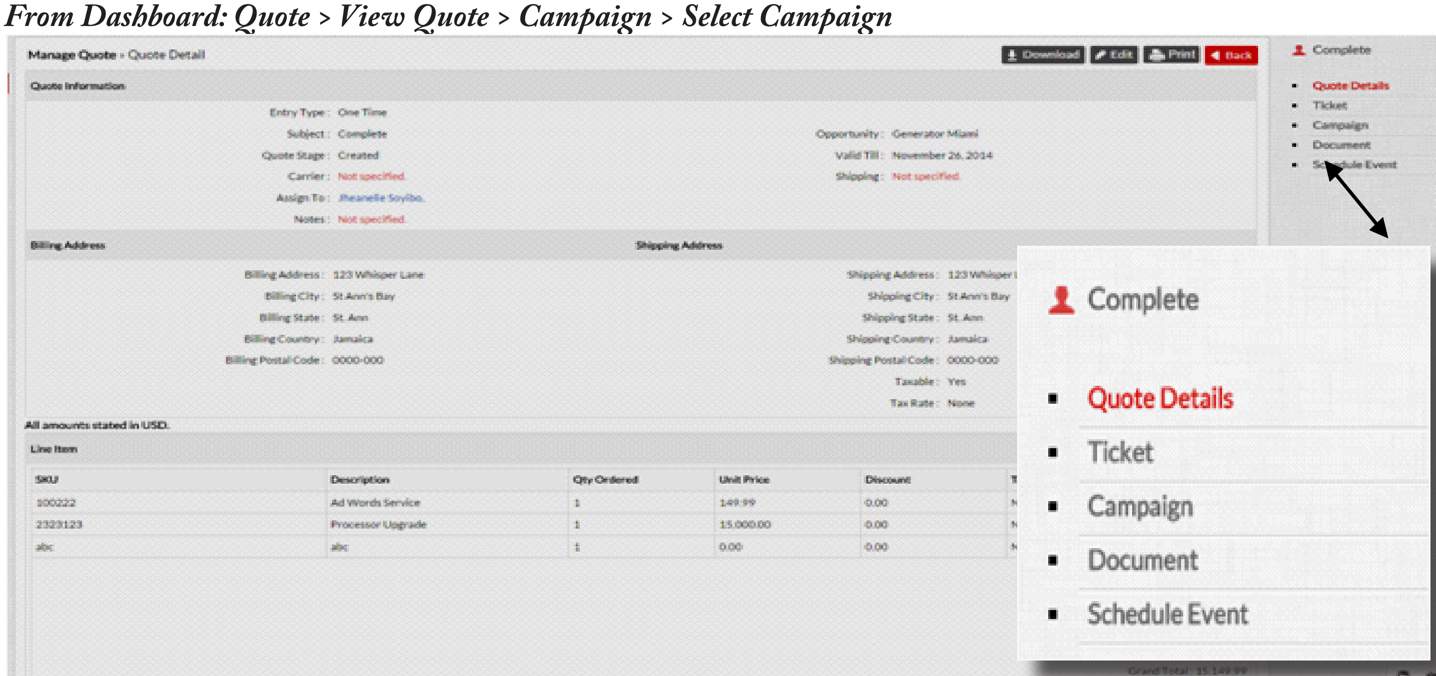
Lead : Add Campaign

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



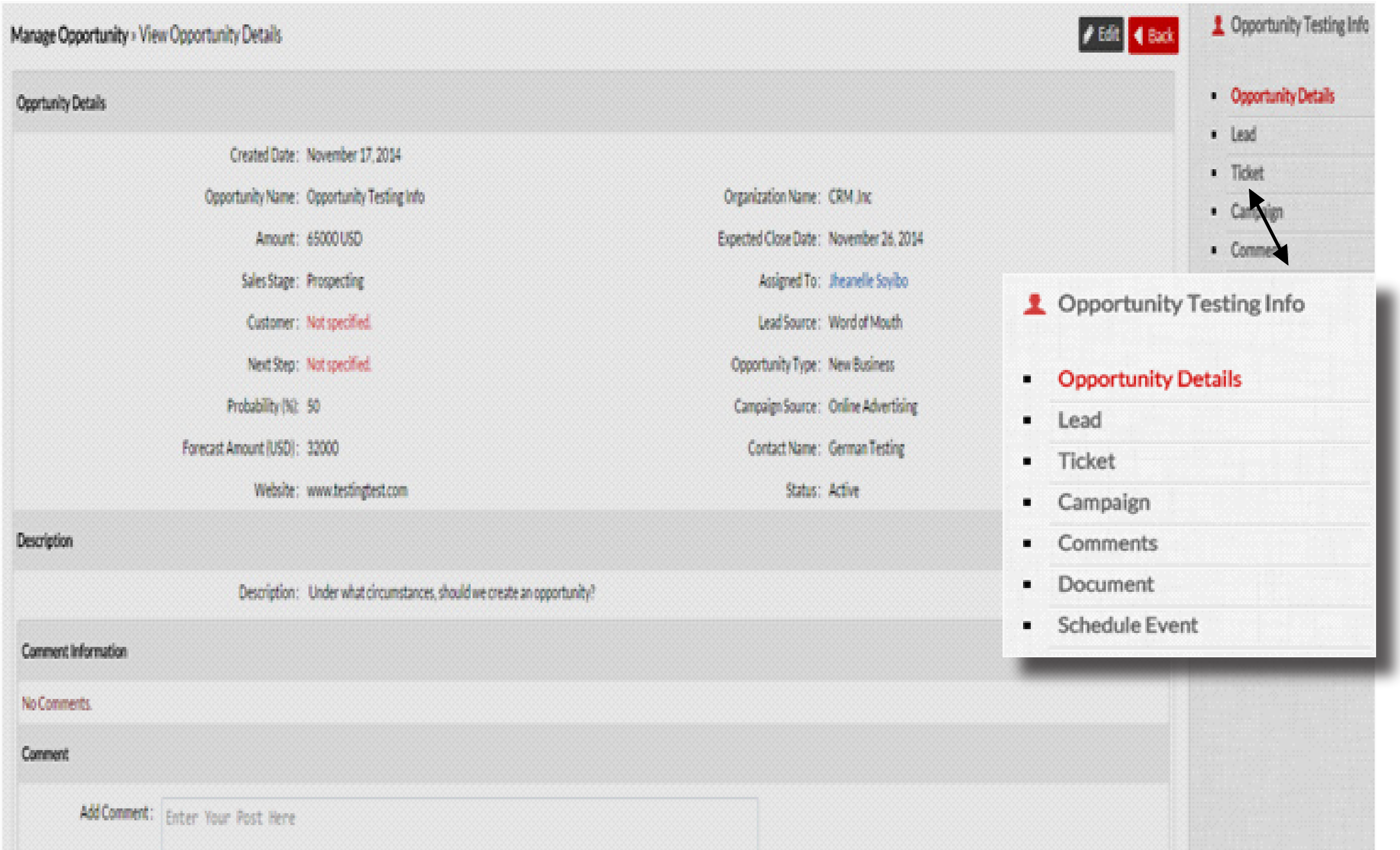
Quotes : Add Campaign

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

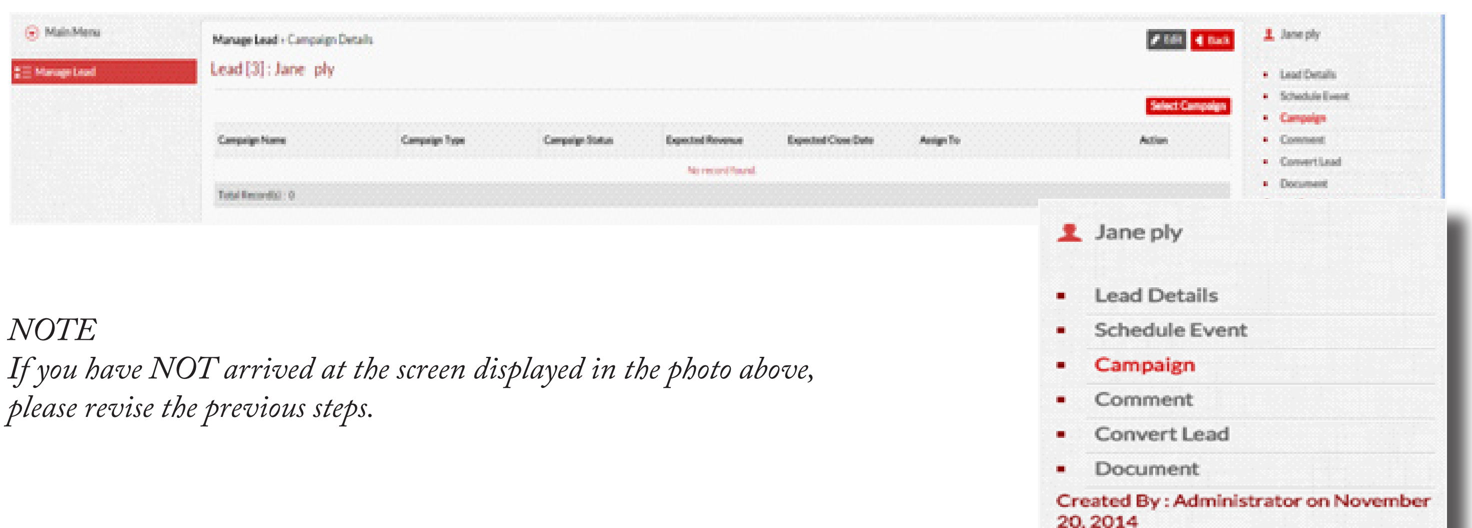


Opportunity : Add Campaign

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



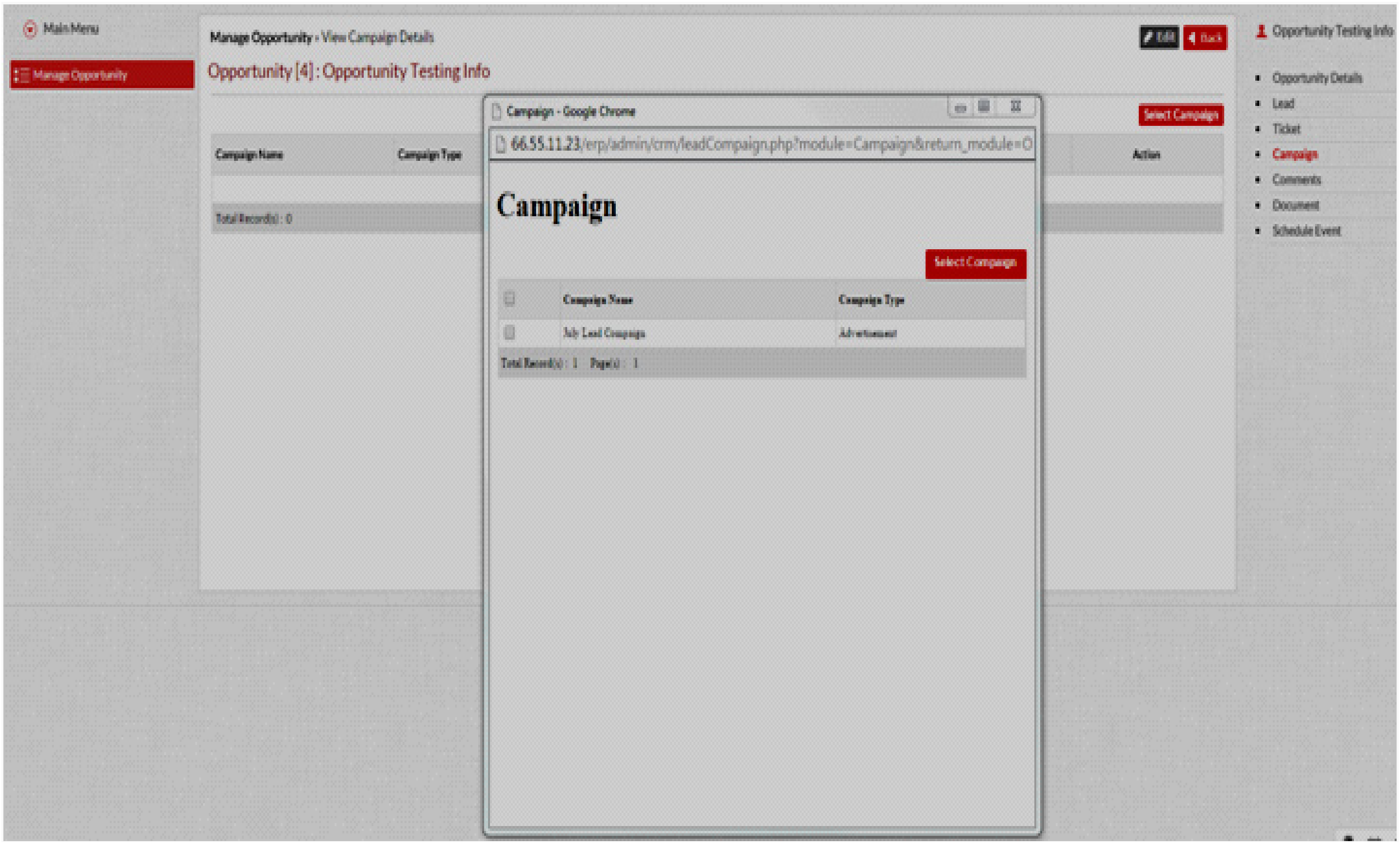
To the right of the screen, there are subcategories shown in the photo above. The photo below is displayed after clicking the sub-category **Campaign**.



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

If you clicked 

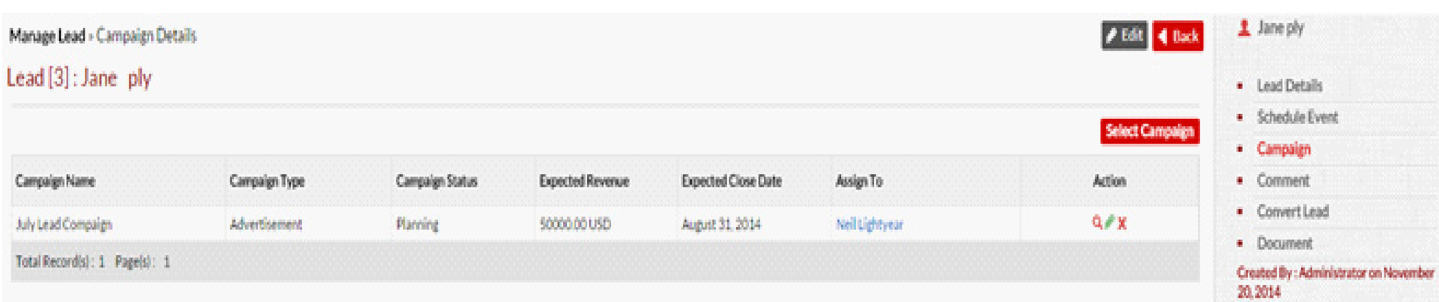
, your CRM screen should be similar to the photo below.



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.

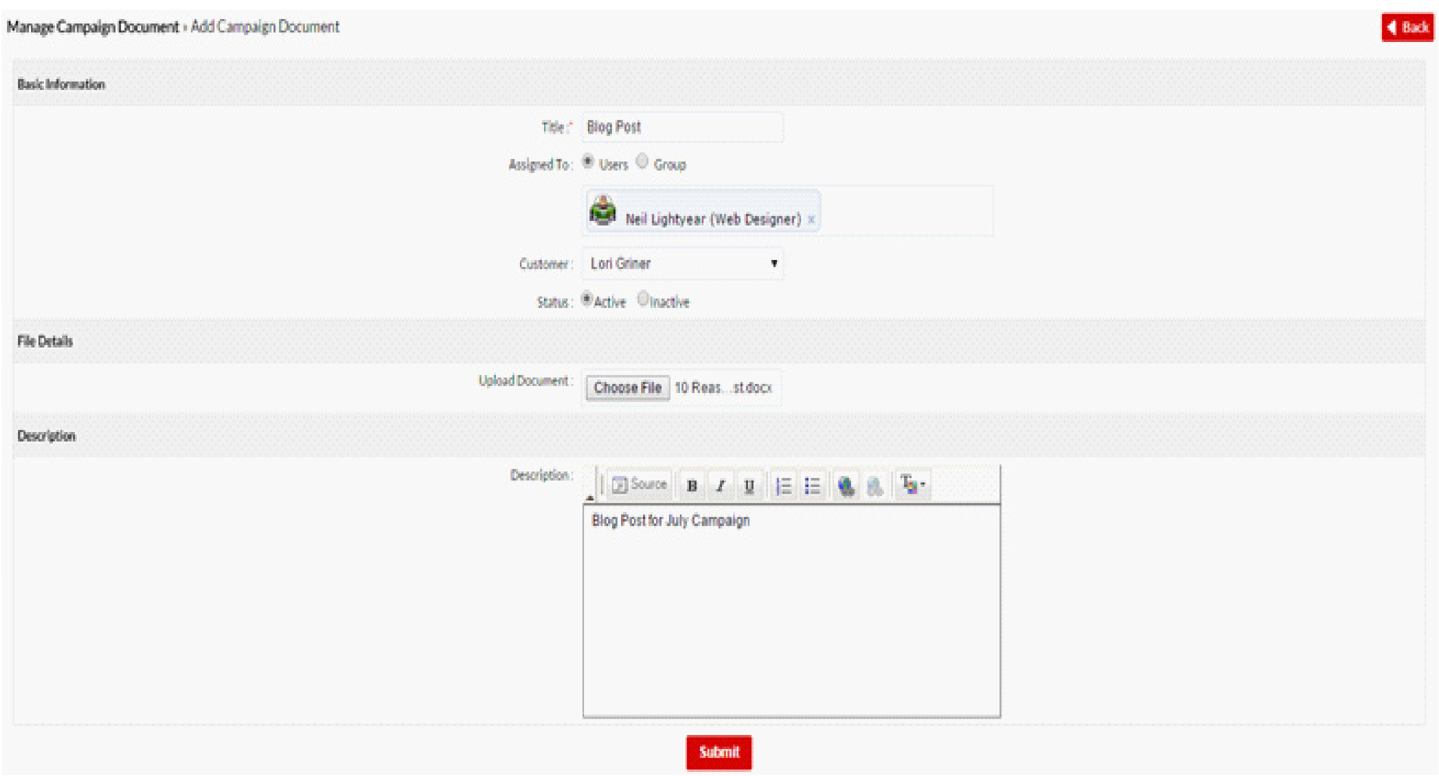


Campaign Documents
Any supplemental documents associated with a specific campaign can be uploaded in the Campaign module. On the right of the CRM screen you should notice a menu column as seen below:

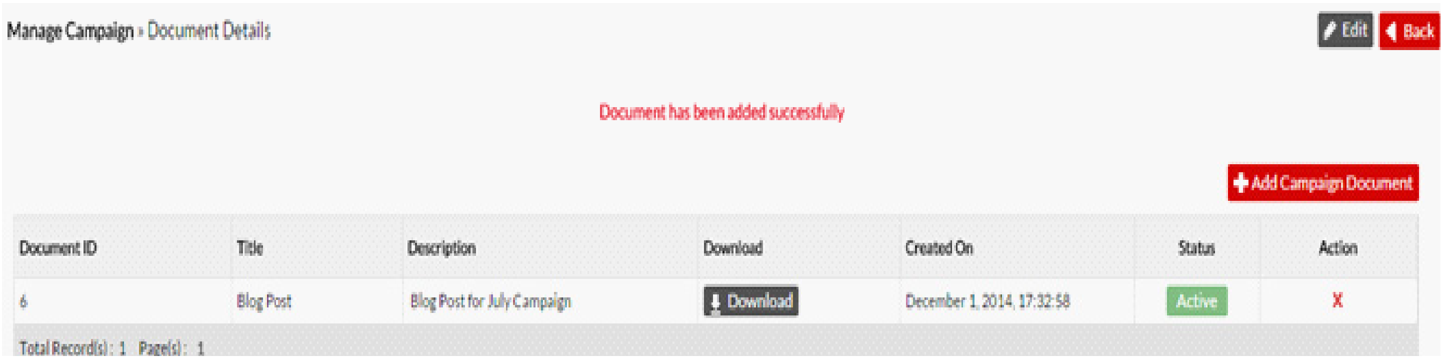
From Dashboard: Campaign > View Campaign > Document

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.



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.



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

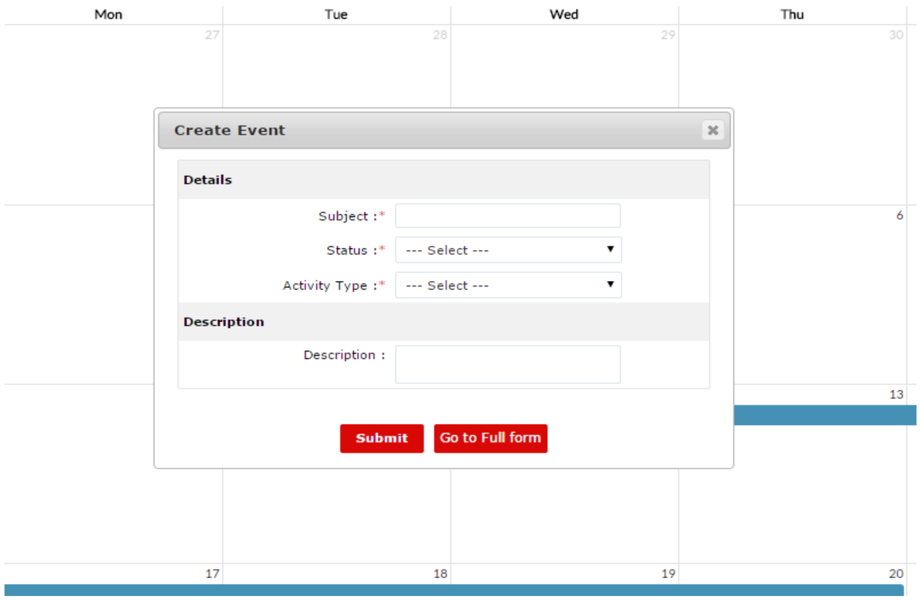
Many leads may be associated to a single campaign, you may have included some existing leads to take part in a particular campaign. In such cases, it is necessary that you keep track of all the leads as a result of the campaign. Using the Campaigns module, you can store all the necessary details in a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

Calendar

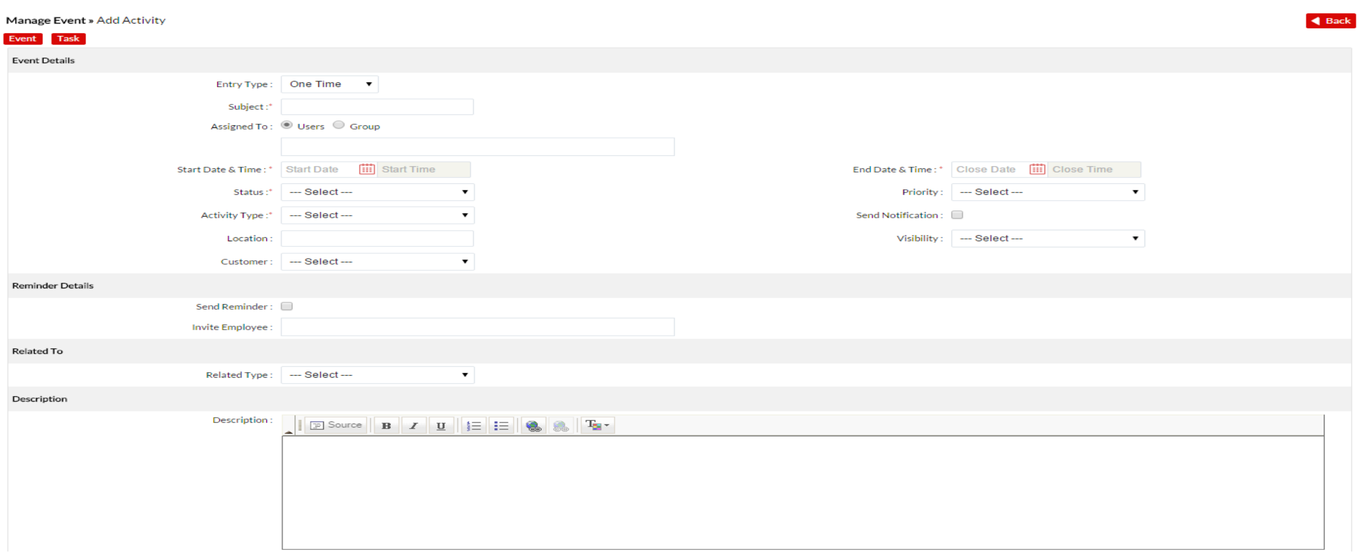
eZnet CRM is equipped with a **CALENDAR** to keep you aware of appointments, events and tasks for one occasion or recurring basis. Events and Tasks scheduled in the **LEAD, OPPORTUNITY, TICKET, QUOTES**, or **CUSTOMER** modules are displayed in the **CALENDAR** for easy access.

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.



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

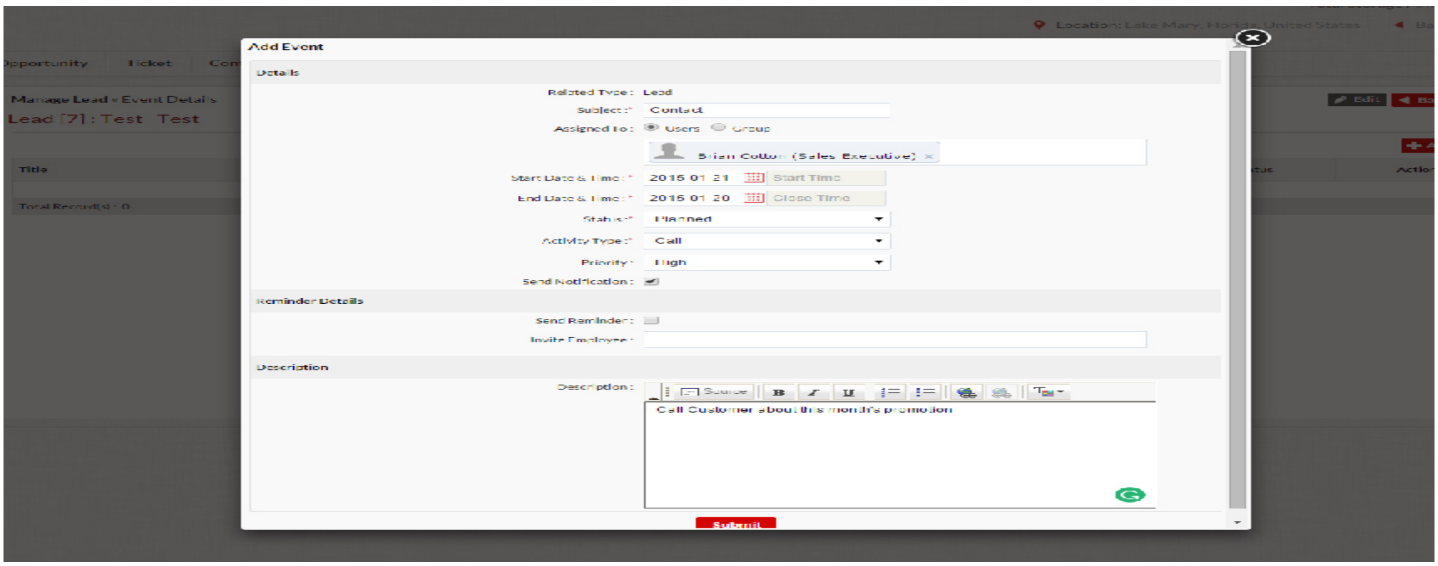
From Dashboard: Lead > View Lead > Schedule Event

Opportunity > View Opportunity > Schedule Event

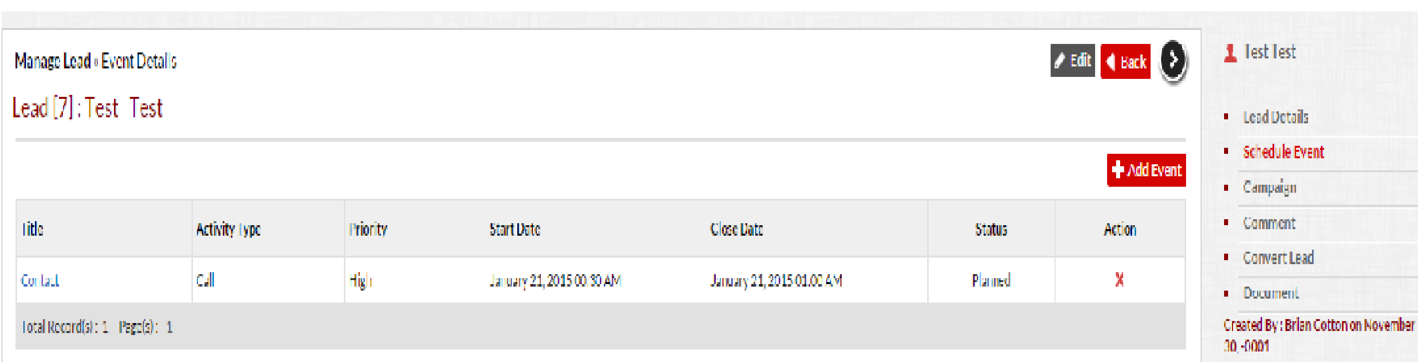
Quotes > View Quotes > Schedule Event

Customer > View Customer > Event/Task

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



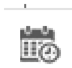
After submitting details for the event/task, for **Lead**, **Opportunity, Quotes, or Customer,** the screen below will show a successful submission. The details that you input will show in the related module and the Calendar module.



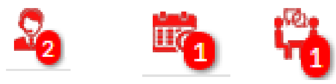
These events/tasks will populate the **Calendar** module and alert the user of upcoming events.

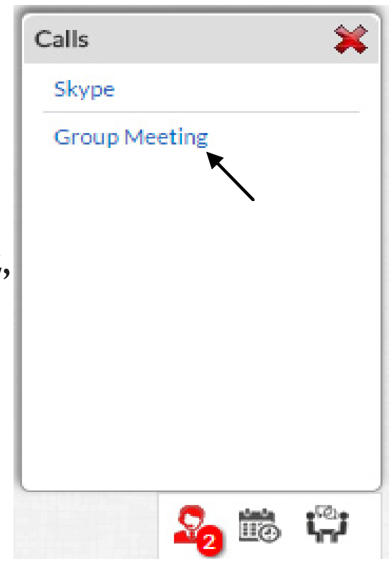
Reminders

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

 - Call  - Meeting  - Task

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



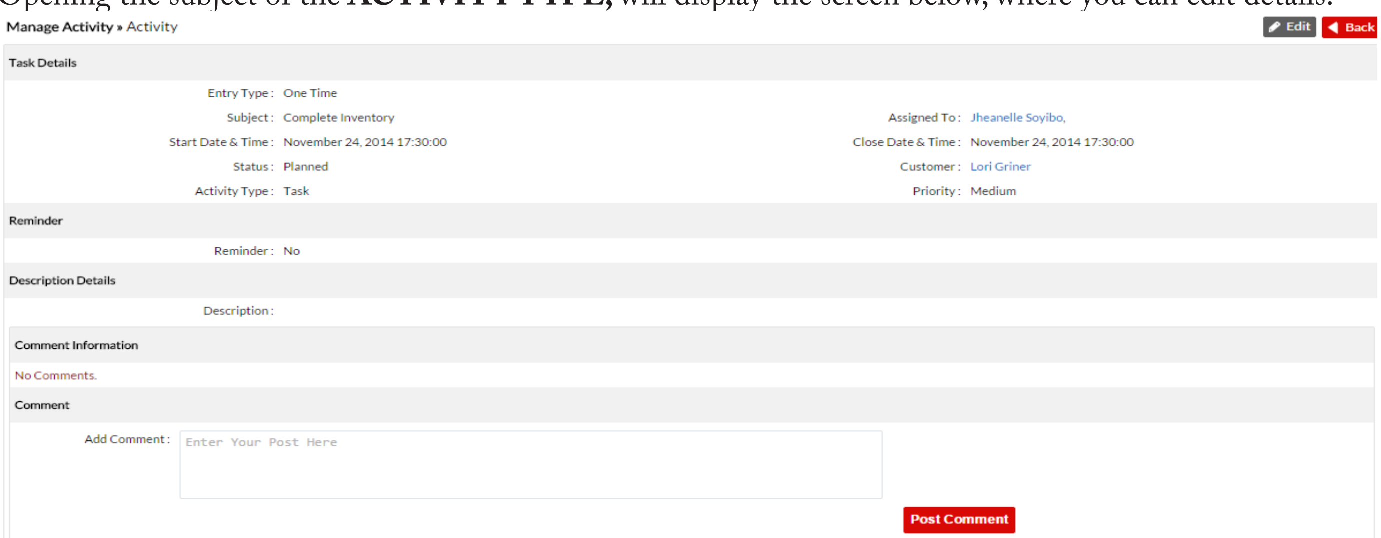


These alerts will let you know which activity needs your attention.

Clicking the icon displays the name of the event.

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

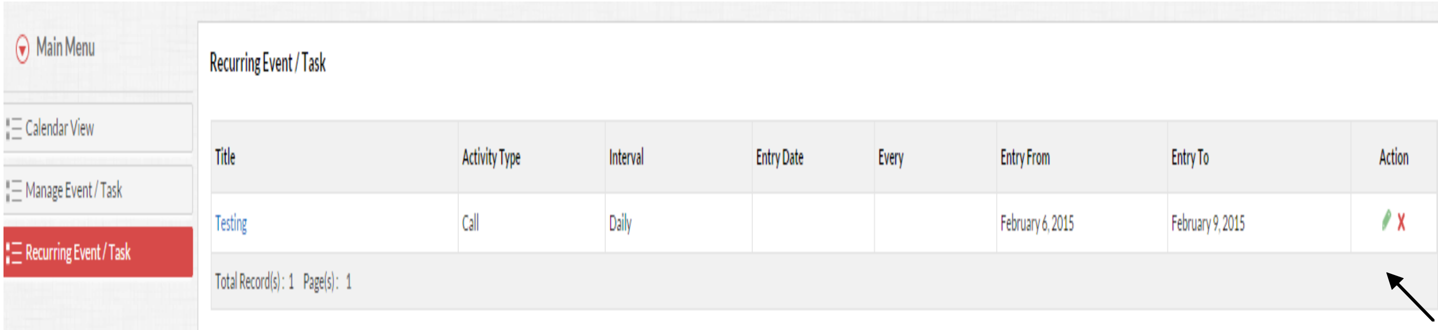
Opening the subject of the **ACTIVITY TYPE,** will display the screen below, where you can edit details.



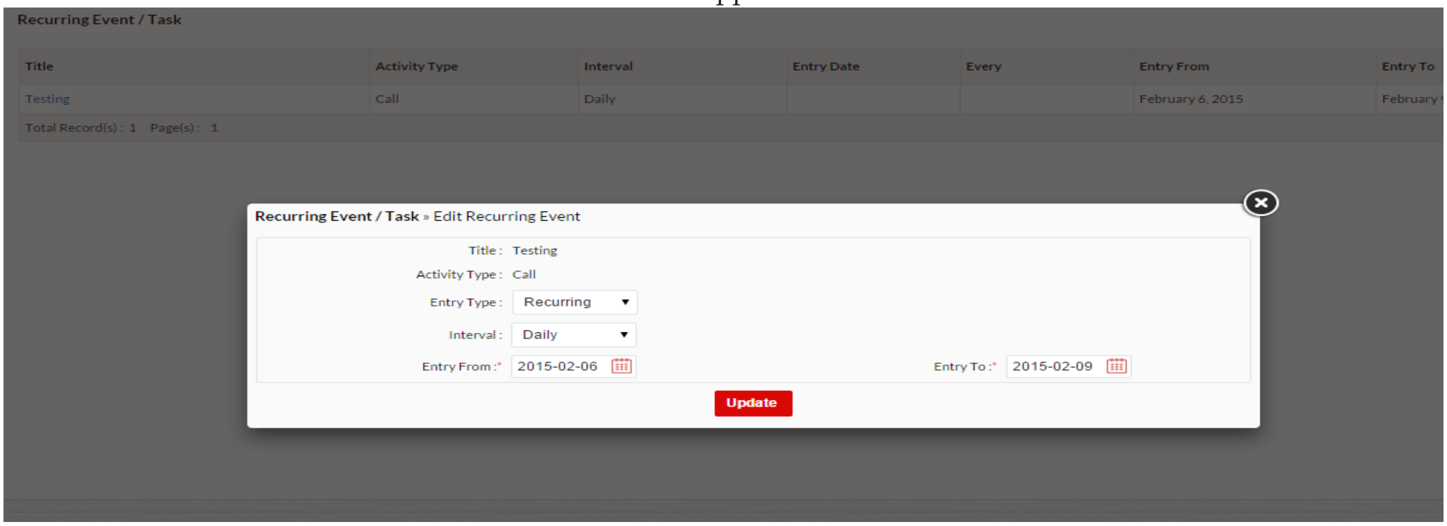
Cancel or Edit Recurring Events/Tasks in Calendar

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**.



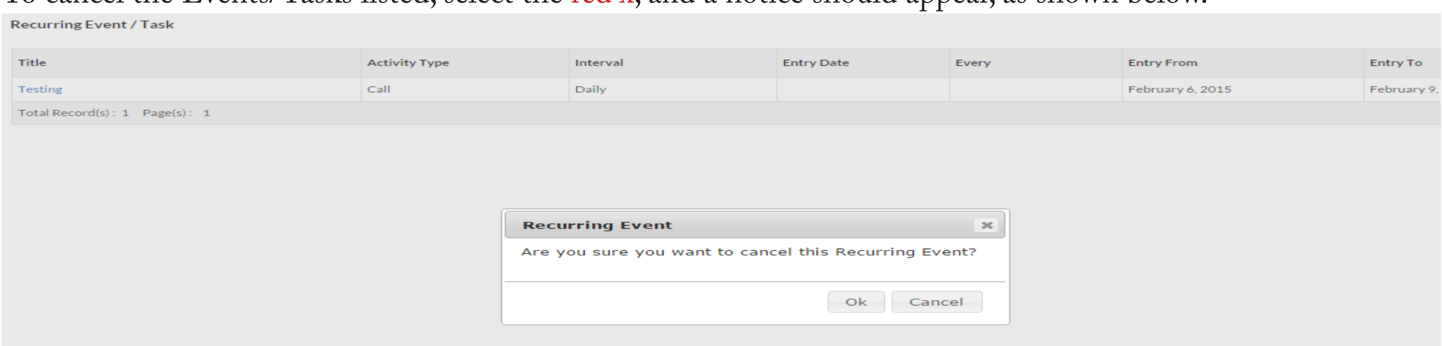
Select an action Icon to edit and the screen below will appear.



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.



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

Event recurring has been cancelled successfully.

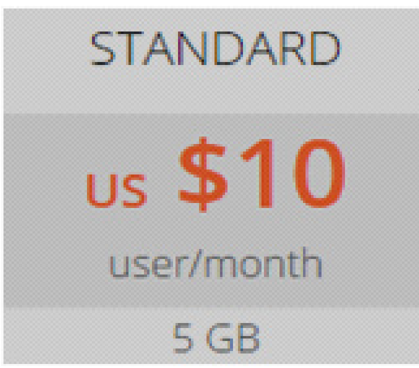
Billing and Payments

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.

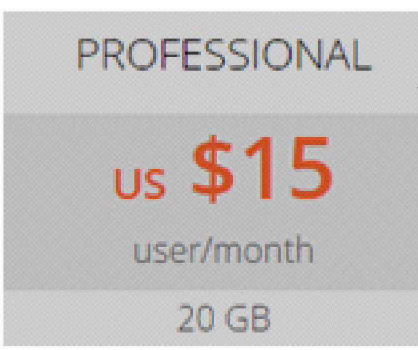
We accept payments via Visa, MasterCard, American Express or PayPal. We also accept payment via bank transfer. For further details, please contact info@eznetcrm.com.

STANDARD



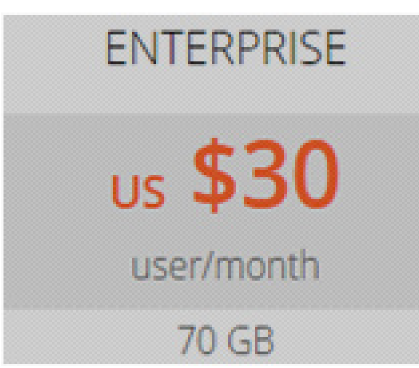
The Standard account is a basic account equipped with Lead, Opportunity, Document and Users modules only. Provides an easy way to store leads and launch campaigns with 5GB of free available space.

PROFESSIONAL

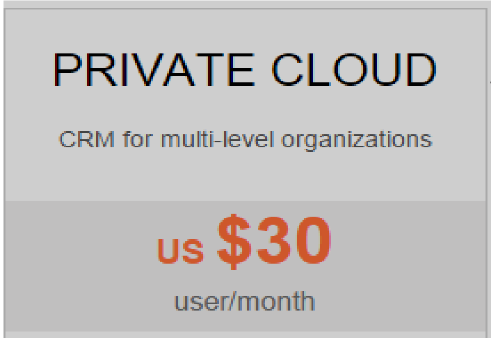


The mid-level Professional account provides the most cost-effective plan. Most modules are available with the exception of Opportunity, Quote and Document. This package enables you to up-sell to leads without limiting your ability.

ENTERPRISE



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.



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.

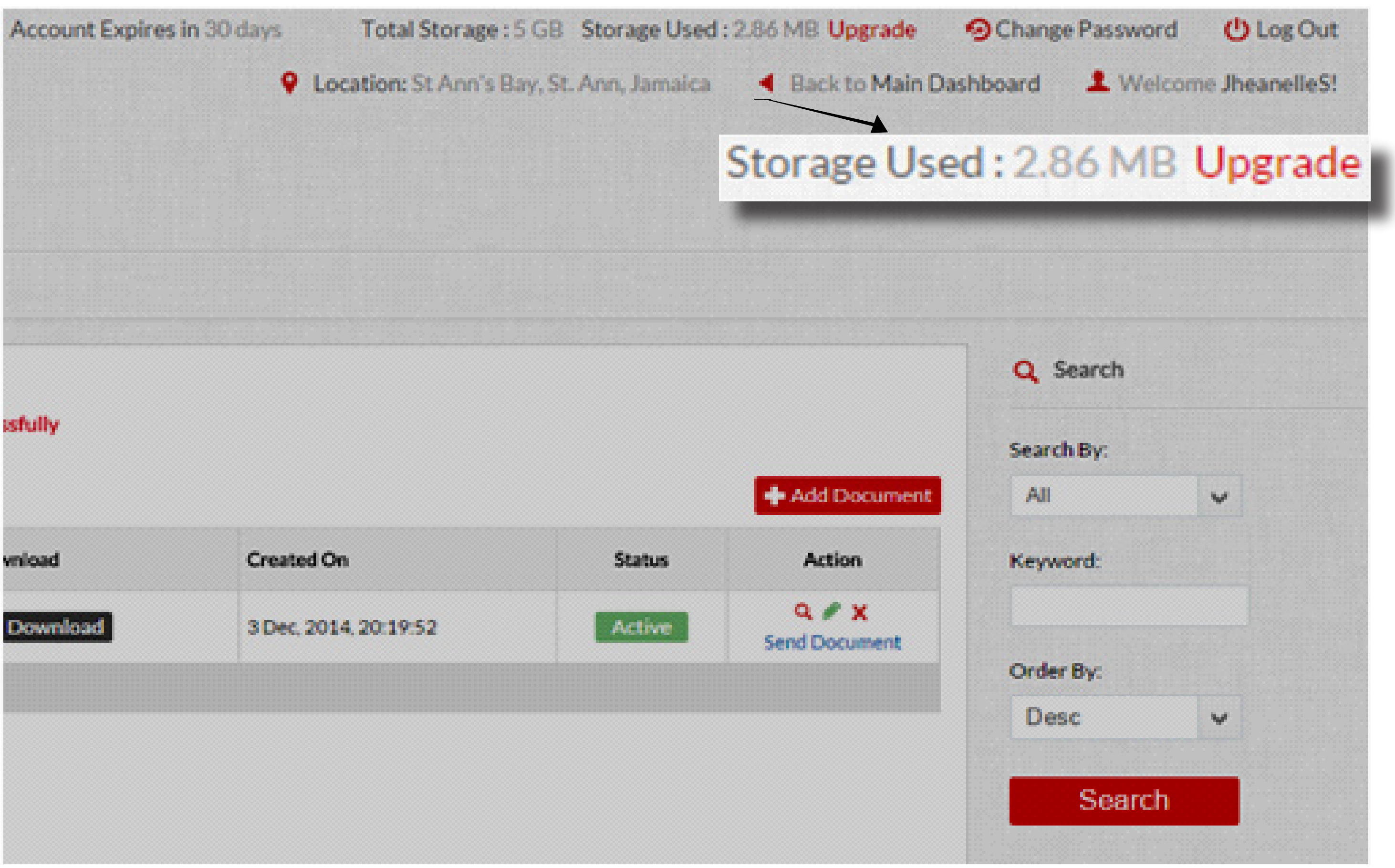
Whichever option you choose eZnet CRM offers the most flexible and comprehensive options for you and your business.

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.



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
or call us
1-877-368-4446

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