

Last update : 02/09/2015



## USER GUIDE & MANUAL

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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.

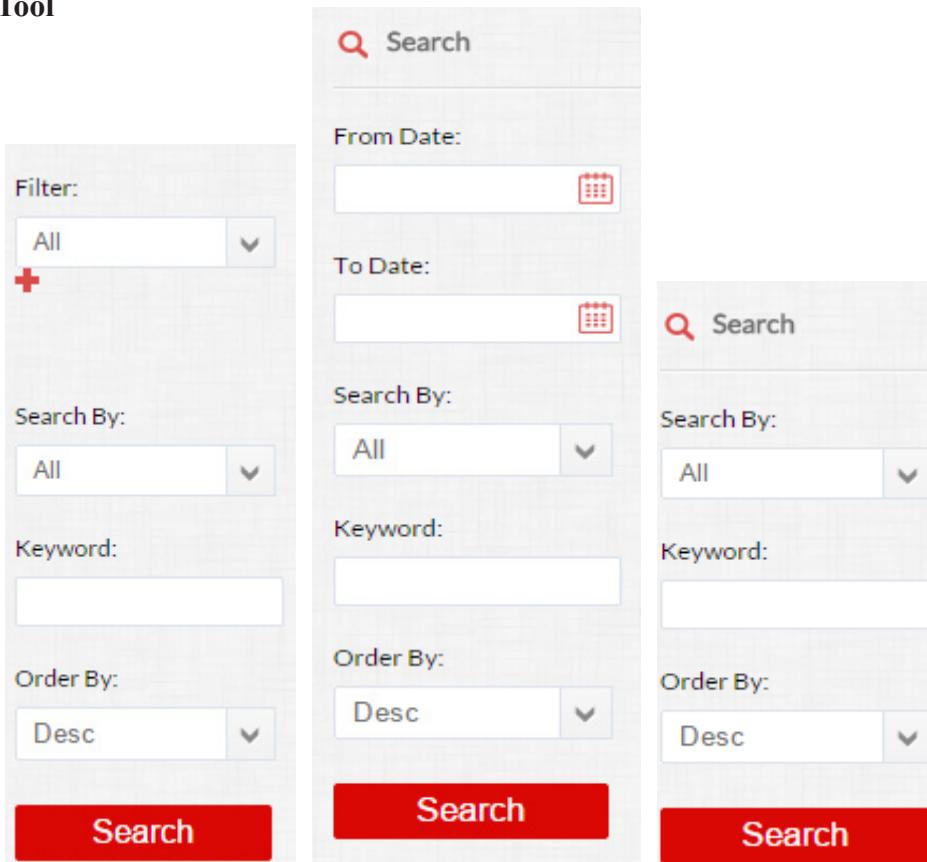
When these action icons are displayed on a list, you are allowed to perform the following functions:

-  - View
-  - Edit
-  - Delete

## **Navigate Records**

View various records using the arrow   located in the modules.

## **Search/Filter Tool**



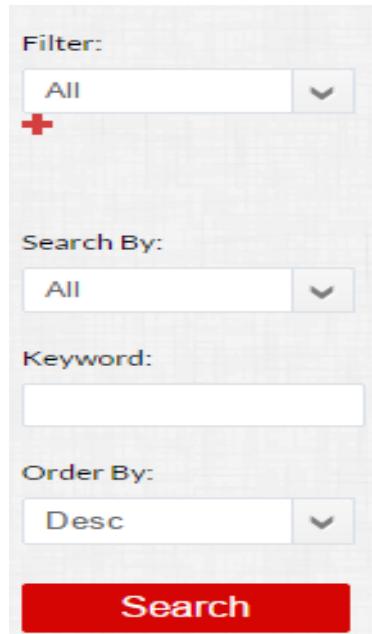
The image displays three separate search/filter tool interfaces, each consisting of several input fields and a red "Search" button at the bottom.

- Left Interface:** Includes a "Filter:" dropdown set to "All" with a plus sign (+) button, a "Search By:" dropdown set to "All", a "Keyword:" input field, and an "Order By:" dropdown set to "Desc".
- Middle Interface:** Includes a "From Date:" calendar input field, a "To Date:" calendar input field, a "Search By:" dropdown set to "All", a "Keyword:" input field, and an "Order By:" dropdown set to "Desc".
- Right Interface:** Includes a "Search By:" dropdown set to "All", a "Keyword:" input field, and an "Order By:" dropdown set to "Desc".

There are three types of search bars in eZnet CRM. Based on the module you choose, you may encounter one of these three search bars above. These are visible on the right side of various modules and can be used to filter and search for specific information in the CRM.

## Custom/Filter Views

As a user of eZnet CRM, you have the capabilities of customizing various lists where you have access. 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).



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

A screenshot of a 'Custom View' configuration page. It has three main sections: 'Details', 'Choose Columns', and 'RULE'.

- Details:** Contains fields for 'View Name' (set to 'Random'), 'Set as Default' (unchecked), and 'Set as Public' (unchecked).
- Choose Columns:** A row of dropdown menus for selecting columns: Lead ID, First Name, Product, Company, and Assigned To.
- RULE:** A grid of dropdown menus for defining rules across five rows. Each row has two columns: 'None' and 'None'.

At the bottom are 'Save' and 'Cancel' buttons.

Select the columns you would prefer to view and implement rules to filter your results.

## 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	<a href="#"></a> <a href="#"></a>	<input type="checkbox"/>
3	Jane	Not specified.	Not specified.	Neil Lightyear, Jheanelle Soyibo,	<a href="#"></a> <a href="#"></a>	<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. Your customized filter can be made private, public or your default view.

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**.

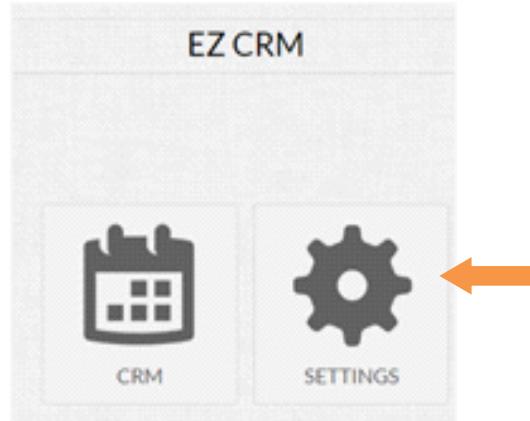
*Note : Only full-service administrators have the ability to change user status.*

# Getting Started

## Organization Settings

Start setting up your CRM, by first creating a company and setting your company's location. First, login to your EZnet CRM account and go to **SETTINGS**, which will take you to the Company Settings page where you can Edit Company Profile, input your Company Location and manage your Dashboard.

*From Dashboard: 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 vertical sidebar with menu items: "Main Menu", "Edit Company Profile" (which is highlighted with a red background), "Company Location", and "Dashboard Icon". The main content area displays "Company Details" with various input fields:

- Users 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: 32745
- Alternate Email: cynthia@virtualstacks.com
- Mobile: 1111111111
- Landline: 8773684446
- Fax:
- Website URL: (Website URL, should start with http://)

A red box highlights the "Edit Company Profile" menu item in the sidebar. A red arrow points to the "Upload Logo" field. A callout box on the right says "Upload Company logo here". The right sidebar shows navigation links for "Company Details" and "Global Settings".

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

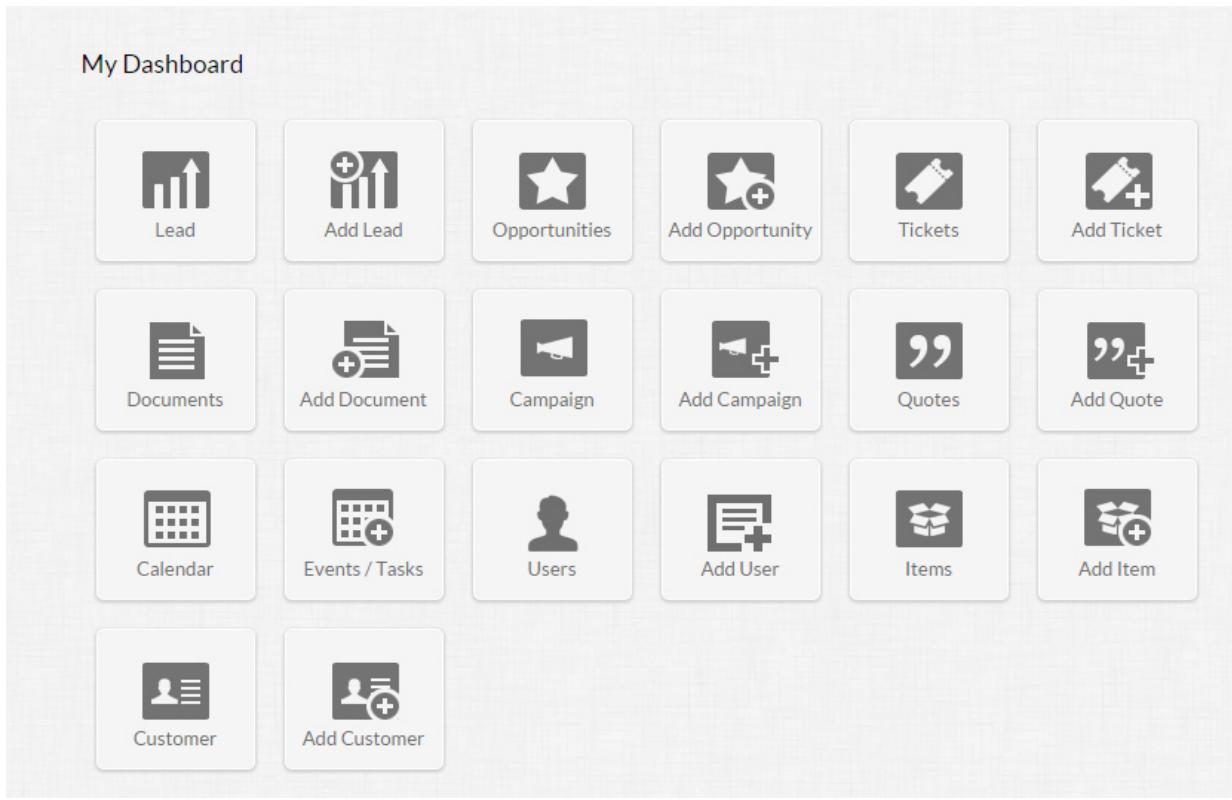
If your company has various locations, you are able to add each location in the Company Location tab.

Company Location							
<span style="float: right;">+ Add Location</span>							
Address	City	State	Country	Zip Code	Timezone	Status	Action
650 technology Park	Lake Mary	Florida	United States	32746	-05:00	Active	<span style="color: red;">Q Primary Location</span>
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.

**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. *Example: Sales Managers, Marketing Managers, Support Agents, 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.

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

These following functions are performed by the Administrator and those that have permission to do so.

To add a new user in eZnet CRM, select the **USER** module item and **ADD USER**. Input the necessary fields indicated by an asterisk and submit, and a unique user code will automatically generate.

### **From Dashboard: More > User > Add User**

You will be taken to the screen below to add and modify user information.

Manage Users » Add User Back

**Personal Details**

User Code :  Gender: \*  Male  Female

First Name: \*  Last Name: \*

Date of Birth: \*  Joining Date: \*

Designation: \*  Upload Photo:  No file chosen

**Contact Details**

Personal Email: \*   
Contact Address: \*   
Country: \* United States   
State: --- Select State ---   
Other State:   
Other City:   
Zip Code: \*   
Mobile: \*

**Account / Login Details**

Email: \*   
Password: \*  (Password Limit: 5 to 15 characters.)  
Confirm Password: \*   
Status:  Active  InActive

Print Email PDF

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

## **Users and Permissions**

### **Change Users and Permissions**

Users with the Manage User's permission in their profile can access the users' list and perform tasks such as adding users, modifying the 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.

*From Dashboard: More > User > Select Action Item* 

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 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 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 screenshot shows the 'Edit Role/Permission' page for the 'Admin' role. On the left, there's a sidebar with 'Role/Permissions' and a dropdown for 'Role: Admin'. Below it are checkboxes for 'View User Info' (checked) and 'View All Records' (checked). A note says: '[If this box is unchecked, Only assigned record will be shown to user.]'. At the top right are 'Back' and 'Save' buttons. The main area is titled 'Allow Permissions' and shows a grid for the 'CRM' module. The grid has columns for 'Module Name' and 'View', 'Modify', 'Full'. Under 'CRM', rows include Lead, Opportunity, Ticket, Document, Campaign, Contact, Quotes, Settings, Report, Calendar, Users, Item Master, and Customer. Most rows have checked boxes in the 'View' and 'Modify' columns, while 'Customer' has an unchecked 'View' box. On the far right, there's a sidebar for 'Jheanelle Soyibo' with a photo, a list of modules ('Personal Details', 'Contact Details', 'Login Details', 'Role/Permission'), and a bottom row of icons.

The photo above displays the Administrator's view of the Role/Permission of the **USER** module in 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 function 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.*

This screenshot shows the 'Edit Role/Permission' page for the 'Other' role. It has a similar layout to the previous one, with a sidebar for 'Role/Permissions' and a dropdown for 'Role: Other'. Checkboxes for 'View User Info' (checked) and 'View All Records' (checked) are present. A note about uncheckable records is also here. The 'Allow Permissions' grid for the 'CRM' module shows mostly checked boxes in the 'View' and 'Modify' columns, except for 'Customer' which has an unchecked 'View' box. The right sidebar for 'Jheanelle Soyibo' is identical to the previous screenshot.

## 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' button and a 'Manage Group' button highlighted in red. Below these are ten 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 is a red 'Add Group' button with a white plus sign.

Group Name	Description	Status	Action
Administration	Test	Active	
Lead Stars	These individuals are responsible for creating new leads for EZ CRM	Active	

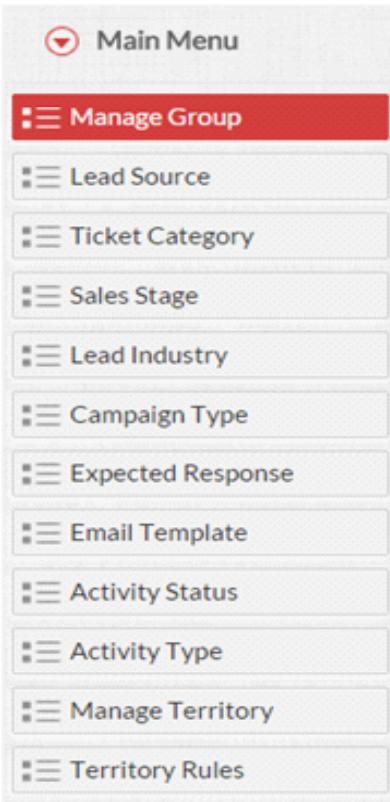
Selecting **Add Group** will take you to the screen below, where you can create the group and the users that belong to it.

The screenshot shows the 'Add Group' form. At the top left is a 'Back' button. The form has several input fields: 'Group Name : \*' with a red asterisk, 'Users : \*' with a red asterisk, and 'Status :  Active  Inactive'. Below these is a 'Description:' field containing a rich text editor toolbar with icons for Source, Bold, Italic, Underline, Numbered List, Bulleted List, Insert Image, and Table. At the bottom center 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	
Total Record(s) : 4			

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 :*	Military
Status :	<input checked="" type="radio"/> Active <input type="radio"/> Inactive
<b>Submit</b> <b>Reset</b>	

Settings > Lead Industry

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	
<b>Military</b>	<b>Active</b>	

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 :* Individual
First Name : Tilly	Last Name :* Hunn
Primary Email : thunn@we.com	Title : Operator
Product :	Product Price (USD): 0.00
Website : www.we.com	Industry : Military
Annual Revenue (USD): 0	Number of Employees : 0
Lead Source :* Cold call	
Lead Date :* 2014-12-09	
Assigned To : <input checked="" type="radio"/> Users <input type="radio"/> Group	Industry : <b>Military</b>

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*

The screenshot shows a web-based form titled "Territory". At the top left is a breadcrumb navigation: "Manage Territory > Add Territory". At the top right is a red "Back" button with a white arrow icon. The main form area has a light gray header bar with the word "Territory". Below this, there are three input fields: a dropdown menu labeled "Select Parent Territory" containing "US", a text input field labeled "Territory Name" containing "Midwest", and a radio button group labeled "Status" with "Active" selected. At the bottom of the form are two buttons: a red "Submit" button and a white "Reset" button.

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.

The screenshot shows a table titled "Territory" with a red "Add Territory" button in the top right corner. The table has three columns: "Territory Name", "Status", and "Action". The "Territory Name" column lists "US", "Eastern", "Western", "Southern", and "Midwest". The "Status" column for all entries is "Active". The "Action" column contains icons: a green checkmark and a red "X" for each row. The entire table is set against a light gray background.

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

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 user interface for managing territory rules. On the left is a vertical navigation menu with various options like Main Menu, Manage Group, Lead Source, Ticket Category, Sales Stage, Lead Industry, Campaign Type, Expected Response, Email Template, Activity Status, Activity Type, Manage Territory, and Territory Rules. The 'Territory Rules' option is highlighted with a red background. 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' in Sub Territory Name, 'US' in Territory Name, a profile picture and name 'Jheanelle Soyibo' in Territory Manager, and a red 'QX' button in Action. The second row has 'Southern' in Sub Territory Name, 'US' in Territory Name, and a red 'QX' button in Action. The third row has 'States with C' in Sub Territory Name, 'US' in Territory Name, and a red 'QX' button in Action. At the bottom of the table area, it says '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.

# Data Administration

## Importing and Exporting

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

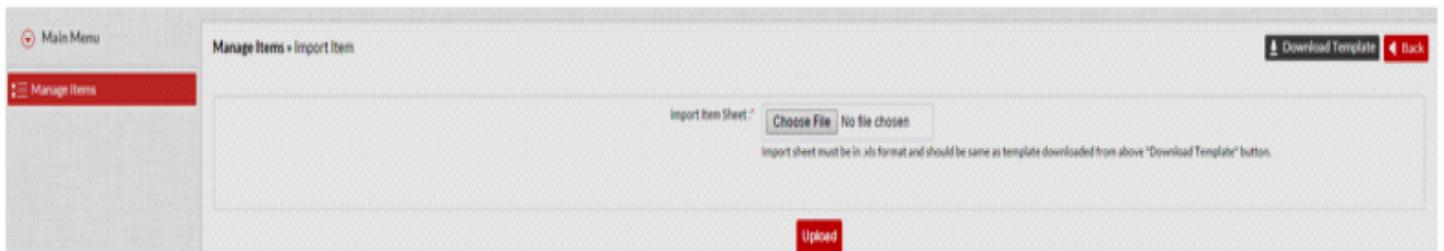
The screens below illustrates how to Import a **Lead**, **Item** or **Customer**.

### Lead > Import Lead

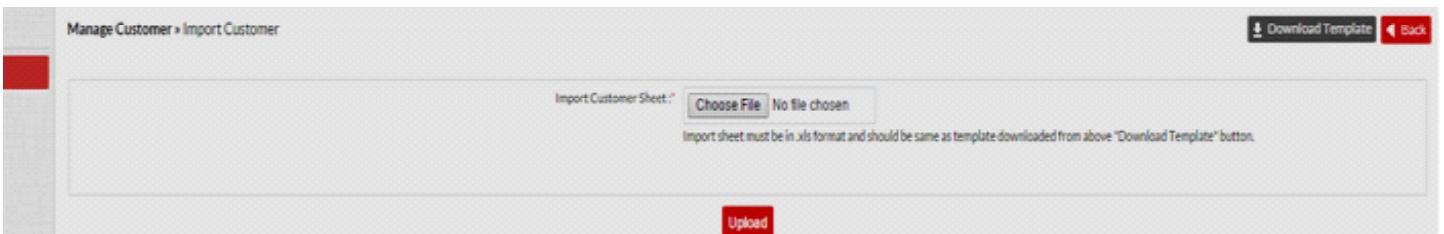
Before importing the Lead spreadsheet ensure that: First Name, Last Name, Street Address and Phone Number are mandatory headings in the spreadsheet you are attempting to upload.



### 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.

## Exporting

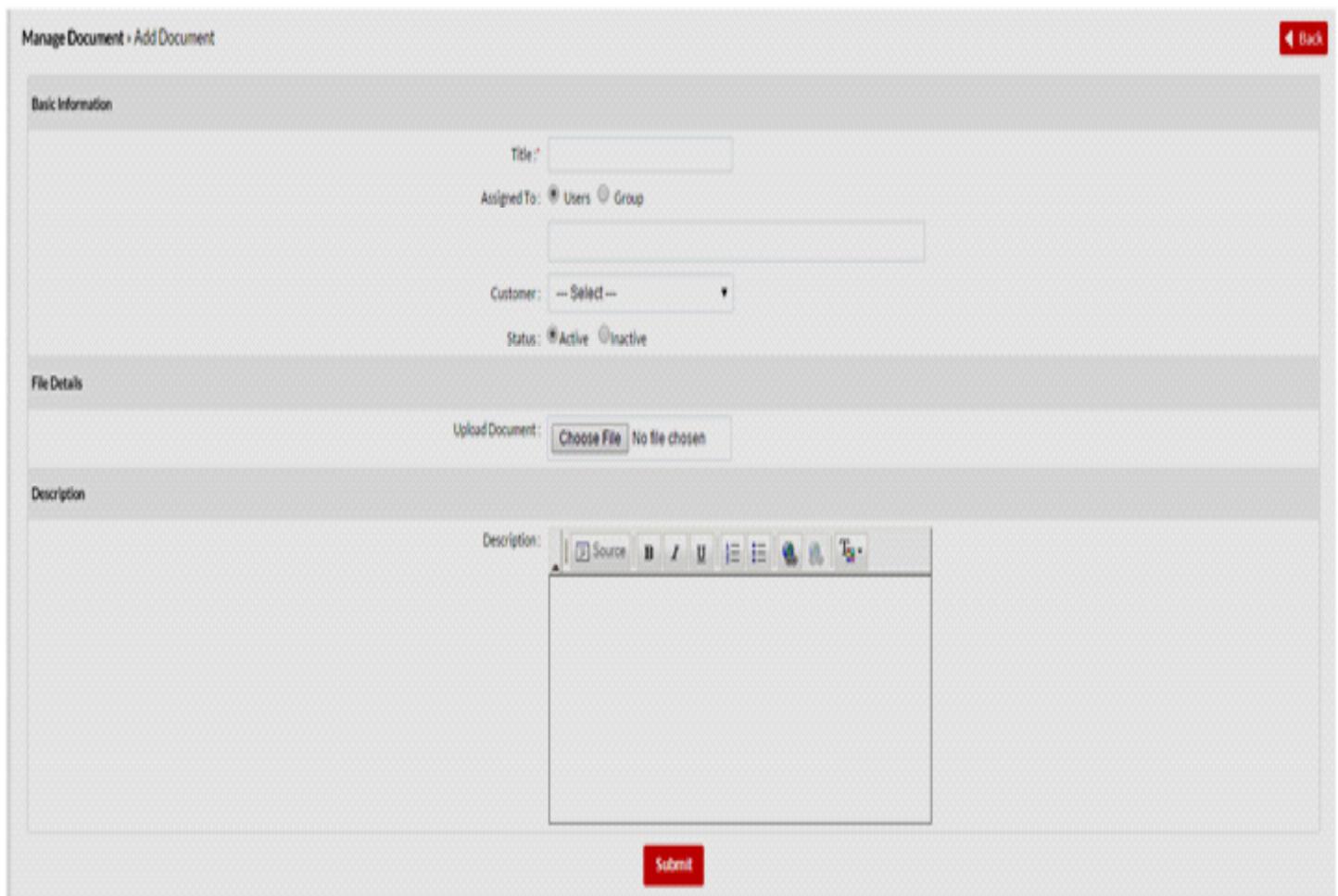
In eZnet CRM, you have an option to export or download documents and templates available in the system. Modules displaying Download  **Download** or Export to Excel  **Export To Excel** can be downloaded for offline use.

## 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** 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.

**Basic Information**

Title :

Assigned To:  Users  Group

Customer:

Status:  Active  Inactive

**File Details**

Upload Document:  EZNet CR...ual.pdf

**Description**

Description:

*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

Search

Add Document

Title	Description	Download	Created On	Status	Action
Blog Post	Blog Post for July Campaign	Download	December 1, 2014, 17:32:58	Active	Send Document
Bucket Test	Testing Document Library	Download	November 25, 2014, 09:58:07	Active	Send Document
Content for CRM Manual	Content for CRM Manual	Download	November 13, 2014, 10:38:33	InActive	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

**Lead [3]: Jane ply**

[Edit](#) [Back](#) [Print](#)

[+ Add Lead Document](#)

Document ID	Title	Description	Download	Created On	Status	Action
2	Bucket Test	Testing Document Library	<a href="#">Download</a>	November 25, 2014, 09:58:07	Active	X

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

**Jane ply**

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

Created By: Administrator on November 20, 2014

## Add Documents to Opportunity

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

Manage Opportunity > View Document Details

**Opportunity [4]: Opportunity Testing Info**

[Edit](#) [Back](#) [Print](#)

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**

[Edit](#) [Back](#) [Print](#)

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

Download
 Edit
 Print
 Back

Document has been added successfully

Add Quote Document

Document ID	Title	Description	Download	Created On	Status	Action
10	Testing Info		Download	December 12, 2014, 12:53:27	Active	

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

Complete

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

## Add Documents to Campaign

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

Manage Campaign » Document Details

Edit
 Back

Document has been added successfully

Add Campaign Document

Document ID	Title	Description	Download	Created On	Status	Action
12	January Plans		Download	December 12, 2014, 13:04:03	Active	

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

Campaign [1]: July Lead Campaign

- Campaign Detail
- **Document**

Created By : Administrator on August 13, 2014

## 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

Back

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

Lori Griner

- 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 screen. 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
- Image:** A photograph of a central processing unit (CPU) chip.

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"/>	Days: <input type="text" value="0"/>
		Ticket Category: * <input type="text" value="Medium Alert"/>	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

The screenshot shows a web-based application interface for managing tickets. On the left, there's a sidebar with 'Main Menu' and 'Manage Ticket' options. The main content area has a header 'Manage Ticket > Edit Resolution Details'. Below the header, the title 'Ticket Resolution' is displayed. A text input field contains the solution: 'Receipts may be faxed or emailed.' To the right of the input field is a red 'Update' button. In the top right corner of the main area, there's a 'Customer Request' section with a 'Back' button and three options: 'Edit Information', 'Edit Description', and 'Edit Resolution'.

## Standard Fields

The screenshot shows a 'Manage Ticket > Add Ticket' page. It includes sections for 'Ticket Information' and 'Description Details'. In the 'Ticket Information' section, there are fields for 'Title' (a large text input), 'Assigned To' (radio buttons for 'Users' or 'Group' with a dropdown menu), 'Ticket Status' (a dropdown menu), 'Ticket Category' (a dropdown menu), 'Hours' (a text input), 'Priority' (a dropdown menu), 'Days' (a text input), and 'Customer' (a dropdown menu). In the 'Description Details' section, there is a 'Description' text input. At the bottom, there is a 'Ticket Resolution' section with a 'Solution' text input and a red 'Submit' button.

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 window 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 modal.

## 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.*

Manage Lead > Add Lead

**Lead Details**

Lead Type:	-- Select --	Company Name:
First Name:		Last Name:
Primary Email:		Title:
Product:		Product Price (USD):
Website:		Industry:
Annual Revenue (USD):		Number of Employees:
Lead Source:	-- Select --	Assigned To:
Lead Status:	-- Select --	Lead Date:
Last Contact Date:	<input type="text"/>	<input type="button" value="Calendar"/>

**Address Details**

Street Address:	
Country:	-- Select Country --
State:	-- Select 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.

Main Menu

**Lead Report**

Lead:	Lead Status:	Lead Source:	Filter By:	From Date:	To Date:
Jheanelle S	-- All --	-- All --	Date Range	2014-11-01	2014-11-26

**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.

The screenshot shows the Lead Report page with the following details:

- Lead Number:** 2
- Lead Date:** November 13, 2014
- Lead Name:** Jheanelle Stylos
- Lead Type:** Individual
- Lead Source:** Public Relation
- Status:** Off

A chart titled "Total Leads" is displayed, showing a single data point at the bottom of a grid.

Conversely, if the criterion was inaccurate, a report is not generated. Instead, the screen displays “**No Record Found**” as seen below.

The screenshot shows the Lead Report page with the following details:

- Lead Number:** 0
- Lead Date:** 0
- Lead Name:** 0
- Lead Type:** 0
- Lead Source:** 0
- Status:** 0

The message "No Record Found." is displayed below the table.

## Customer

Customers are people with whom you are presently conducting business.

### 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*

The screenshot shows the Import Customer page with the following interface elements:

- Import Customer Sheet:** Choose File [No file chosen]
- Upload** button
- Note:** 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.

## 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 Customer > Add Customer

**General Information**

Customer Code :	---
Customer Type :	--- Select ---
First Name :	---
Gender :	---Select---
Customer Since :	---
Payment Method :	--- None ---
Upload Photo :	<input type="button" value="Choose File"/> No file chosen
Status :	<input checked="" type="radio"/> Active <input type="radio"/> InActive
Last Name :	---
Email :	---
Payment Term :	--- None ---
Shipping Method :	--- None ---
Taxable :	<input type="checkbox"/>

**Contact Information**

Address :	---
Country :	United States
State :	--- Select State ---
Other State :	---
Other City :	---
Zip Code :	---
Mobile :	---
Landline :	---
Fax :	---
Website :	---

**Submit**

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

**Address Details**

Address *
Country: United States
State: --- Select State ---
Other State:
Other City:
Zip Code *
Mobile *
Landline:

**Description Details**

Description:
--------------

**Submit**

## Contact List

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

Manage Contact

**Add Contact**

FirstName	LastName	Email	Title	Assign To	Status	Action
Dwight	Ducatti	dwight@ducatti.com	Not specified.	Not assigned.	<span style="background-color: green; color: white;">Active</span>	
Polly	Dee	testing3@virtualstacks.com	Manager	Jheanelle Soyibo	<span style="background-color: green; color: white;">Active</span>	

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.

## Quote Information

Entry Type: One Time  
 Subject: Complete  
 Quote Stage: Created  
 Carrier: Not specified.  
 Assign To: Jheanelle Soyibo.  
 Notes: Not specified.

Opportunity: Generator Miami  
 Valid Till: November 26, 2014  
 Shipping: Not specified.

## Billing Address

Billing Address: 123 Whisper Lane  
 Billing City: St Ann's Bay  
 Billing State: St. Ann  
 Billing Country: Jamaica  
 Billing Postal Code: 0000-000

## Shipping Address

Shipping Address: 123 Whisper Lane  
 Shipping City: St Ann's Bay  
 Shipping State: St. Ann  
 Shipping Country: Jamaica  
 Shipping Postal Code: 0000-000  
 Taxable: Yes  
 Tax Rate: None

All amounts stated in USD.

## Line Item

SKU	Description	Qty Ordered	Unit Price	Discount	Taxable	Amount
100222	Ad Words Service	1	149.99	0.00	No	149.99
2323123	Processor Upgrade	1	15.0000.00	0.00	No	15.0000.00
abc	abc	1	0.00	0.00	No	0.00
						Sub Total: 15,149.99
						Tax: 0.00
						Freight: 0.00
						Grand Total: 15,149.99

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.

## Manage Quotes

[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	<a href="#">Send Quote</a>

However, 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.

Manage Quotes

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

**Send Quote**

**Quote Information**

Quote Number #: 1  
 Subject: Complete  
 Quote Date: November 14, 2014

**Send Email**

To: Jane.Daly@froth.com  
 CC:  
 Attach Document: Choose File No file chosen  
 Message:

**Send**

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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

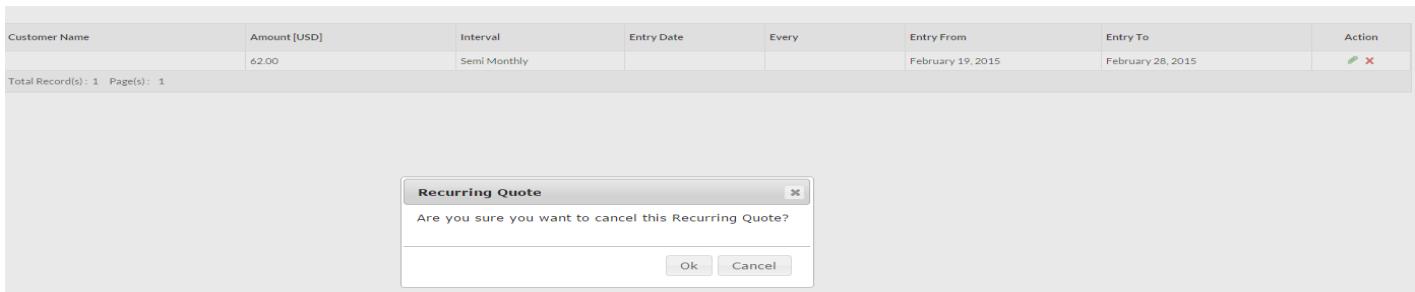
Interval: Monthly

Entry From: 2014-12-18

Entry To: 2015-12-18

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](#)

The screenshot shows the 'Add Opportunity' form. It is divided into two main sections: 'Opportunity Details' and 'Description'.

**Opportunity Details:**

- Opportunity Name:
- Organization Name:
- Amount (USD):
- Expected Close Date:  [Close Date](#) [Close Time](#)
- Sales Stage:
- Assigned To:
- Customer:
- Lead Source:
- Next Step:
- Opportunity Type:
- Probability (%):
- Campaign Source:
- Forecast Amount (USD):
- Contact Name:
- Website:
- Status:  Active  InActive

**Description:**

Description:

## 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 for 'Opportunity ID', 'Amount', 'Assigned To', 'Website', 'Probability (%)', and 'Action'. The data in the table is as follows:

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), 'Assigned To', 'Customer' (dropdown), 'Lead Source', 'Next Step', 'Opportunity Type', 'Probability (%)', 'Campaign Source', 'Forecast Amount (USD)', 'Contact Name', 'Website', and 'Status' (radio buttons for 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 a 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.

The screenshot shows the 'Edit Campaign Details' page under 'Manage Campaign'. The page is divided into three main sections: 'Campaign Information', 'Expectations & Actuals', and 'Description'.

**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:**

A rich text editor interface is shown, with a toolbar at the top containing icons for Source, Bold, Italic, Underline, Insert, Link, and others.

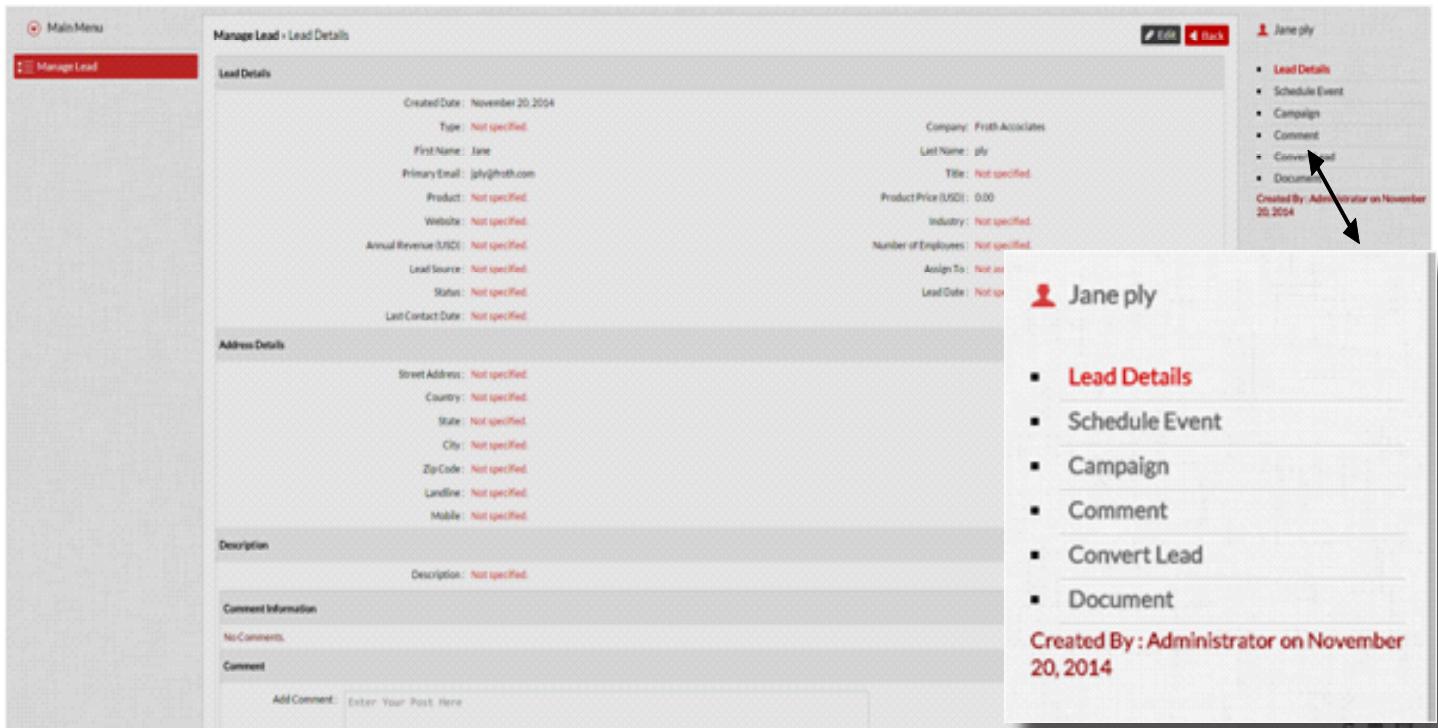
## Add Campaign to Lead, Quote & Opportunity

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

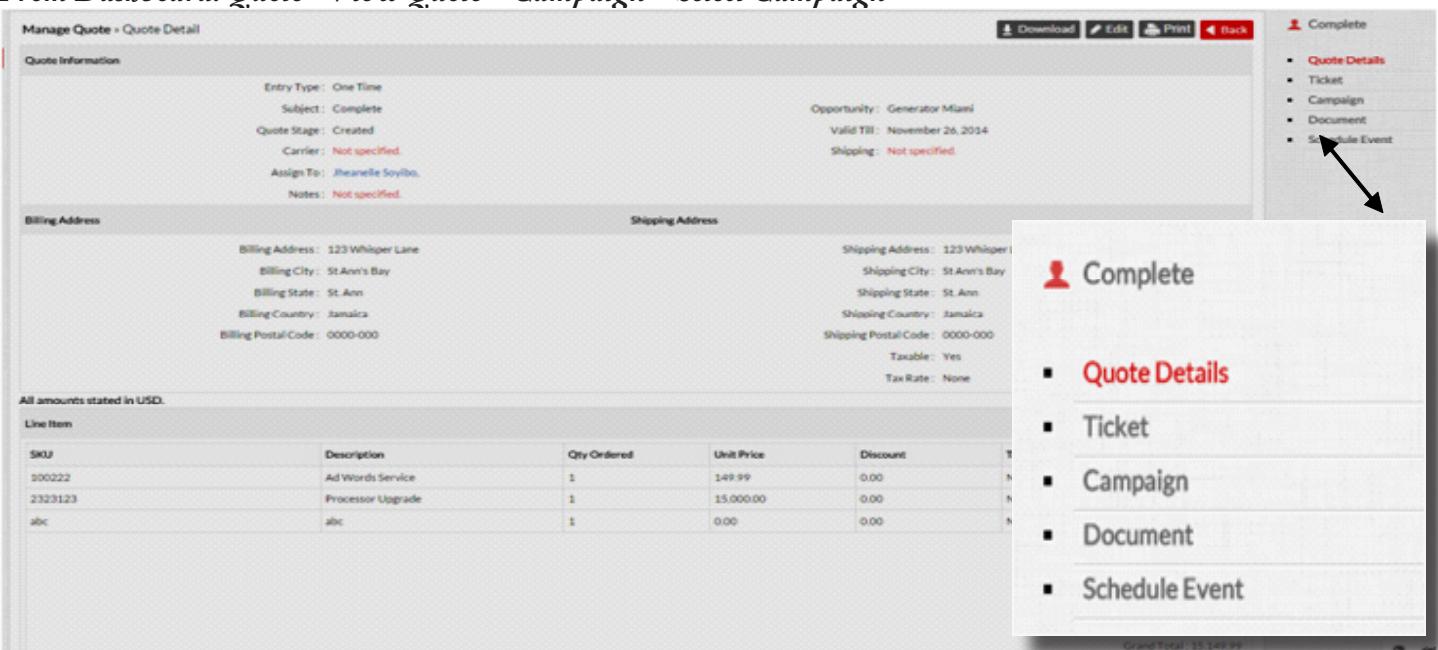
*From Dashboard: Lead > Select Lead Name > Campaign > Select Campaign*



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', etc., 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

The screenshot shows the 'Opportunity : Add Campaign' screen. At the top, there are buttons for 'Edit' and 'Back'. On the left, there's a sidebar titled 'Opportunity Testing Info' with a list of sub-categories: Opportunity Details, Lead, Ticket, Campaign, and Comments. The 'Campaign' item is highlighted with a red arrow pointing to it. The main content area displays various opportunity details such as Created Date (November 17, 2014), Opportunity Name (Opportunity Testing Info), Organization Name (CRM, Inc.), and Status (Active). Below this is a 'Description' section with a note about creating opportunities under certain circumstances. Further down is a 'Comment Information' section showing 'No Comments.' and a 'Comment' input field labeled 'Add Comment: Enter Your Post Here'.

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**.

The screenshot shows the 'Manage Lead - Campaign Details' screen. The left sidebar has a 'Select Campaign' button highlighted with a red arrow. The main content area shows a table with columns for Campaign Name, Campaign Type, Campaign Status, Expected Revenue, Expected Close Date, Assign To, and Action. A message 'No record found.' is displayed. The right sidebar is titled 'Jane ply' and lists sub-categories: Lead Details, Schedule Event, Campaign, Comment, Convert Lead, and Document. At the bottom of the sidebar, it says '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 lists actions: "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 with a red header 'Campaign [1]: July Lead Campaign'. Below it is a list: 'Campaign Detail' (with a minus sign) and 'Document' (with a plus sign). A red arrow points from the 'Document' item to the text 'Created By: Administrator on August 13, 2014'. The main content area has columns for Document ID, Title, Description, Download, Created On, Status, and Action. It displays a message 'No record found.' and 'Total Record(s): 0'. Below the main content is a sidebar with a red header 'Campaign [1]: July Lead Campaign' and a list: 'Campaign Detail' (minus) and 'Document' (plus). Below that is the same creation date message.

**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. Below these is a 'Description' section with a rich text editor containing the text '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.*

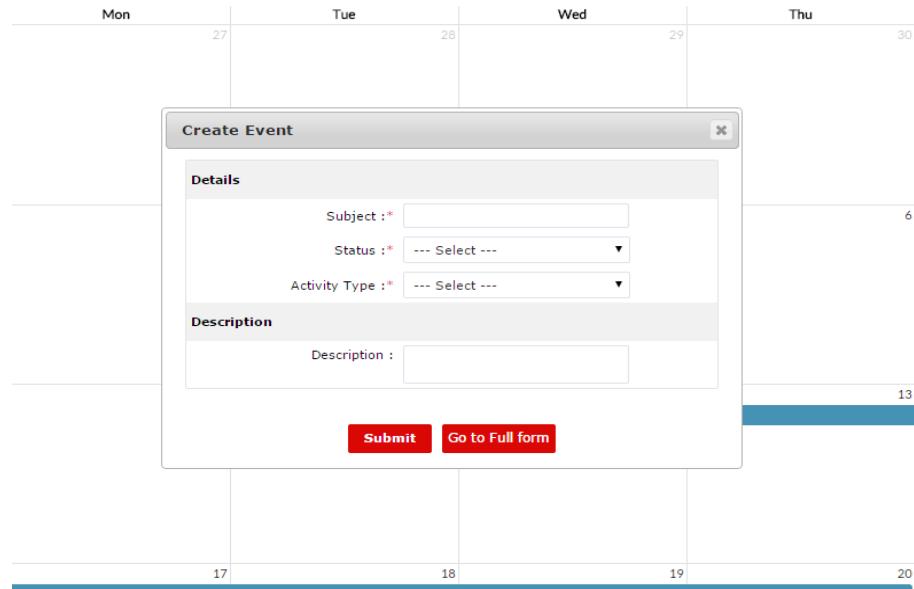
Many leads may be associated to a single campaign, you may have included some existing leads to take part in a particular campaign. In such cases, it is necessary that you keep track of all the leads as a result of the campaign. Using the Campaigns module, you can store all the necessary details in a 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). The 'Event Details' section contains many dropdown menus with placeholder text like '... Select ...'.

*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 a Lead. The table displays one record: 'Call' activity type, 'High' priority, start date 'January 21, 2015 00:30 AM', end date 'January 21, 2015 01:00 AM', status 'Planned', and action 'X'. A sidebar on the right lists 'Lead Details', 'Schedule Event' (which is selected), 'Campaign', 'Comment', 'Convert Lead', and 'Document'. A note at the bottom says 'Created By: Brian Cotton on November 30, 2001'.

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.

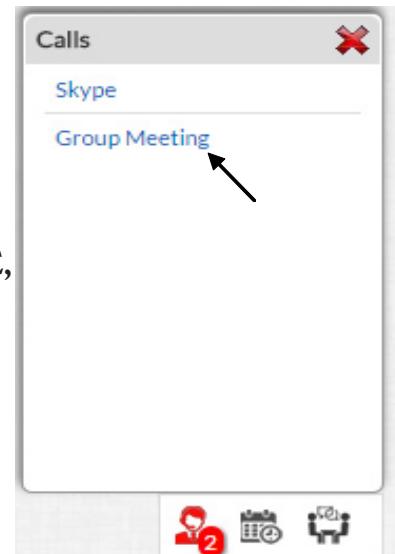


When a reminder for an **ACTIVITYTYPE** has been set prior to any calendar event/task, an alert displays in red.



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 'Task Details' form. At the top, it says 'Manage Activity » Activity'. Below that is a 'Task Details' section with fields: 'Entry Type: One Time', 'Subject: Complete Inventory', 'Start Date & Time: November 24, 2014 17:30:00', 'Status: Planned', 'Activity Type: Task', 'Assigned To: Jheanelle Soyibo', 'Close Date & Time: November 24, 2014 17:30:00', 'Customer: Lori Griner', and 'Priority: Medium'. Under 'Reminder', it says 'Reminder: No'. In the 'Description Details' section, there is a 'Description:' field. The 'Comment Information' section shows 'No Comments.'. The 'Comment' section has a 'Add Comment: Enter Your Post Here' input field and a 'Post Comment' button.

## 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**.

RecurringEvent/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

Recurring Event / Task > Edit Recurring Event

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

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 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 lead 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.

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 bar with the following items from left to right: "Account Expires in 30 days", "Total Storage: 5 GB Storage Used: 2.86 MB [Upgrade](#)", "Change Password", and "Log Out". Below the header, there is a navigation bar with "Location: St Ann's Bay, St. Ann, Jamaica", a "Back to Main Dashboard" link, and a welcome message "Welcome JheanelleS!". A large callout box highlights the "Storage Used: 2.86 MB [Upgrade](#)" link. The main content area contains a table with columns: "Upload", "Created On", "Status", and "Action". There is one row visible with a "Download" button, the date "3 Dec, 2014, 20:19:52", an "Active" status, and an "Action" column with a "Send Document" link. 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 "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

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