iMS
SYSTEMS
Powered By
ADDVantage
TECHNOLOGIES
CRM

Key

Starting Point

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Ending Point(s)

Adding a Customer

Select the relevant Business Unit

Enter the Organisation Name

Upload the Logo

Select the Organisation Profile

Prospect, Warm lead, Qualified, Proposal or Live

Enter the Building name of the Customer

Enter the Street name of the Customer

Enter the Town of the Customer

Enter the Post Code of the Customer

If Live Profile

Enter the Registration number of the Customer

Enter the Primary Contact for the Customer

Enter the Email for the Primary Contact

Enter the Phone Number for the Primary Contact

Enter the Source of the Customer

Enter the Contract Value of the Customer

If Not Live Profile

Enter the Probability for the Customer

Enter the Service Provision of the Customer

Select the Account Manager for the Customer

Is the Customer Live?

No

Yes

Enter the Account Number for the Customer

Select the Contract Start Date

Select the Contract End Date

Select the Review Date

Do you need to Upload any Attachments?

Yes

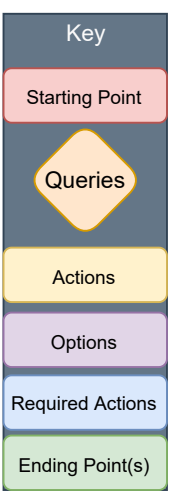
No

Drag and Drop the Attachment into the Attachment Field
or
Click in the Attachment Field, Navigate to the Document and Select it

Enter any Notes, if required

Click "Create" / "Go Live"

Process Complete



Modifying a Customer

Select the "Customers & prospects" tab

Select the relevant filter

All, My Customers, Live Customers, Prospects, Warm leads, Qualified or Proposals

Select the Modify (Pencil) button next to the relevant Customer

Select the "Amend" tab

Amend the Organisation Name, if required

Change the Logo, if required

Amend the Organisation Profile, if required

Prospect, Warm lead, Qualified, Proposal or Live

You cannot change this if the Customer is Live

Amend the Building name of the Customer, if required

Modify the Street name of the Customer, if required

Amend the Town of the Customer, if required

Amend the Post Code of the Customer, if required

If Live Profile

Amend the Registration number of the Customer, if required

Amend the Primary Contact for the Customer, if required

Amend the Email for the Primary Contact, if required

Amend the Phone Number for the Primary Contact, if required

Enter the Secondary Contact for the Customer, if required

Enter the Email for the Secondary Contact, if required

Amend the Source of the Customer, if required

Amend the Contract Value of the Customer, if required

If Not Live Profile

Amend the Probability for the Customer, if required

Amend the Service Provision of the Customer, if required

Amend the Account Manager for the Customer, if required

Is the Customer Live?

No

Yes

Enter/Amend the Account Number for the Customer, if required

Enter/Amend the Contract Start Date, if required

Enter/Amend the Contract End Date, if required

Enter/Amend the Review Date, if required

Do you need to Upload any Attachments?

Yes

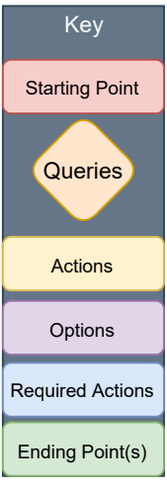
No

Drag and Drop the Attachment into the Attachment Field
or
Click in the Attachment Field, Navigate to the Document and Select it

Enter/Amend any Notes, if required

Click "Update" / "Go Live"

Process Complete



Adding Interactions to a Customer

Select the "Customers & prospects" tab

Select the relevant filter

All, My Customers, Live Customers, Prospects, Warm leads, Qualified or Proposals

Select the Modify (Pencil) button next to the relevant Customer

Select the "Amend" tab

Enter the New Interaction

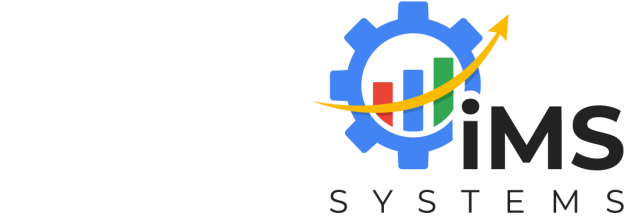
Click "Add"

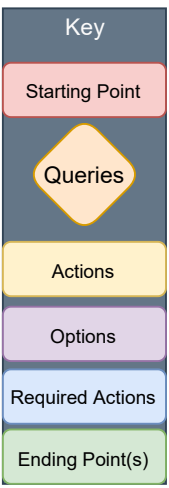
Do you need to add another Interaction?

Yes

No

Process Complete





Deleting a Customer

Select the "Customers & prospects" tab

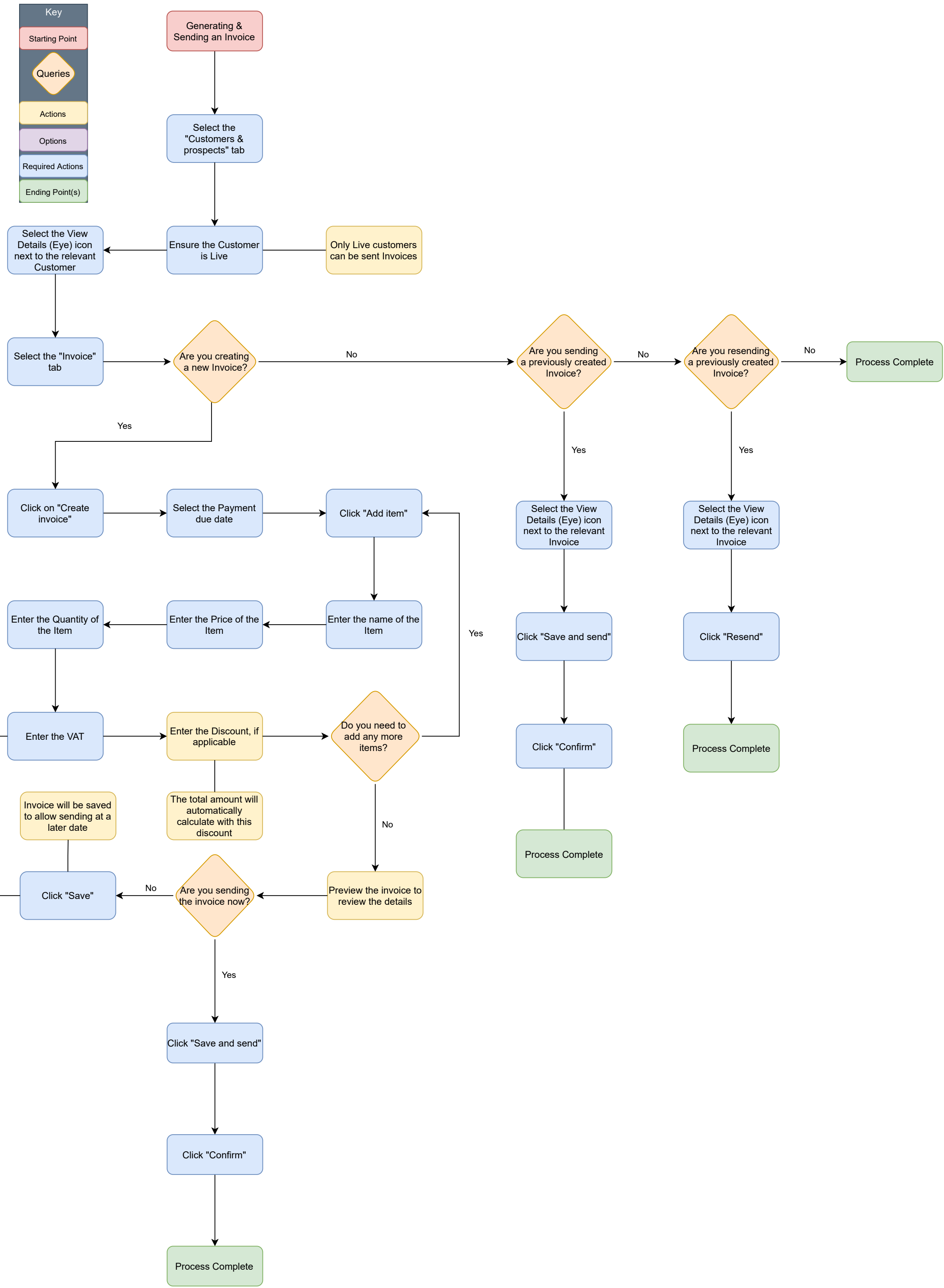
Select the relevant filter

All, My Customers, Live Customers, Prospects, Warm leads, Qualified or Proposals

Select the delete icon next to the relevant Customer

Click "Confirm"

Process Complete


Key
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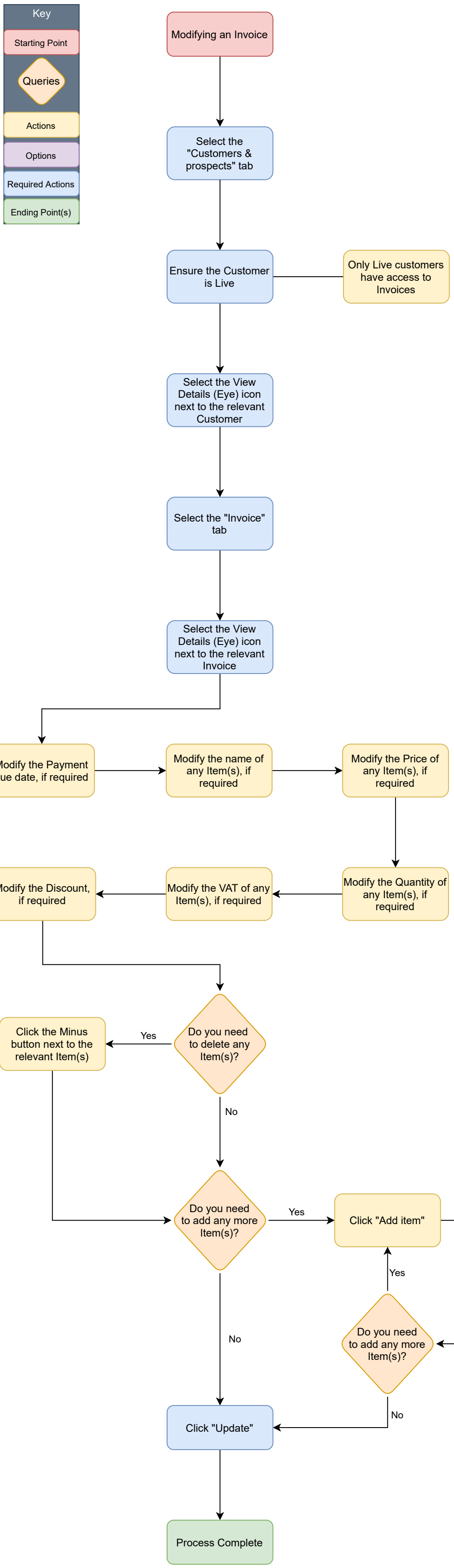
Generating & Sending an Invoice
Select the "Customers & prospects" tab
Ensure the Customer is Live
Only Live customers can be sent Invoices
Select the View Details (Eye) icon next to the relevant Customer
Select the "Invoice" tab
Are you creating a new Invoice?
No
Yes
Are you sending a previously created Invoice?
No
Are you resending a previously created Invoice?
No
Process Complete
Click on "Create invoice"
Select the Payment due date
Click "Add item"
Enter the name of the Item
Enter the Price of the Item
Enter the Quantity of the Item
Enter the VAT
The amount will automatically calculate per item
Enter the Discount, if applicable
The total amount will automatically calculate with this discount
Do you need to add any more items?
Yes
No
Preview the invoice to review the details
Are you sending the invoice now?
No
Yes
Click "Save"
Invoice will be saved to allow sending at a later date
Process Complete
Select the View Details (Eye) icon next to the relevant Invoice
Click "Save and send"
Click "Confirm"
Process Complete
Select the View Details (Eye) icon next to the relevant Invoice
Click "Resend"
Process Complete
Click "Save and send"
Click "Confirm"
Process Complete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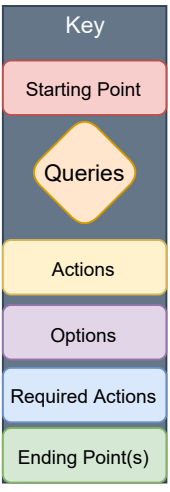
Modifying an Invoice
Select the "Customers & prospects" tab
Ensure the Customer is Live
Only Live customers have access to Invoices
Select the View Details (Eye) icon next to the relevant Customer
Select the "Invoice" tab
Select the View Details (Eye) icon next to the relevant Invoice
Modify the Payment due date, if required
Modify the name of any Item(s), if required
Modify the Price of any Item(s), if required
Modify the Quantity of any Item(s), if required
Modify the VAT of any Item(s), if required
Modify the Discount, if required
Do you need to delete any Item(s)?
Yes
Click the Minus button next to the relevant Item(s)
No
Do you need to add any more Item(s)?
Yes
Click "Add item"
Enter the name of the Item
Enter the Price of the Item
Enter the Quantity of the Item
Enter the VAT
Do you need to add any more Item(s)?
Yes
No
No
Click "Update"
Process Complete



Downloading an Invoice

Select the "Customers & prospects" tab

Ensure the Customer is Live

Only Live customers have access to Invoices

Select the View Details (Eye) icon next to the relevant Customer

Select the "Invoice" tab

Select the View Details (Eye) icon next to the relevant Invoice

Click "Download"

Process Complete

Key

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Raising a Customer Incident

Select the "Customers & prospects" tab

Ensure the Customer is Live

Only Live customers have access to Incidents

Select the View Details (Eye) icon next to the relevant Customer

Select the "Manage incidents" tab

Select the "Raise Incident" tab

Select the Business Unit

Enter a Title for the Incident

Enter a Description for the Incident

Enter the Method of Notification of the Incident

Enter the Affeced Service

Assign a Priority to the Incident P1-P4

Select the Incident Owner

Do you need to Upload any Documents?

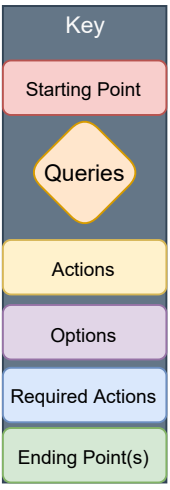
Yes

Drag and Drop the Document into the Attachment Field
or
Click in the Attachment Field, Navigate to the Document and Select it

No

Click "Create"

Process Complete



Escalating a Customer Incident

Select the "Customers & prospects" tab

Ensure the Customer is Live

Only Live customers have access to Incidents

Select the View Details (Eye) icon next to the relevant Customer

Select the "Manage incidents" tab

Press the Escalate (Middle) Button on the Right Hand Side of the relevant Incident

Click "Confirm"

Process Complete

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Modifying and Resolving a Customer Incident

Select the "Customers & prospects" tab

Ensure the Customer is Live

Only Live customers have access to Incidents

Select the View Details (Eye) icon next to the relevant Customer

Select the "Manage incidents" tab

Select the View Details (Eye) icon next to the relevant Customer Incident

Select the "Amend incident" tab

Modify the Title for the Incident, if required

Modify the Description for the Incident, if required

Modify the Method of Notification of the Incident, if required

Modify the Affeced Service, if required

Modify the Priority Level, if required

Do you need to Upload any Documents?

Yes

No

Drag and Drop the Document into the Attachment Field
or
Click in the Attachment Field, Navigate to the Document and Select it

Are you Resolving the Incident?

Yes

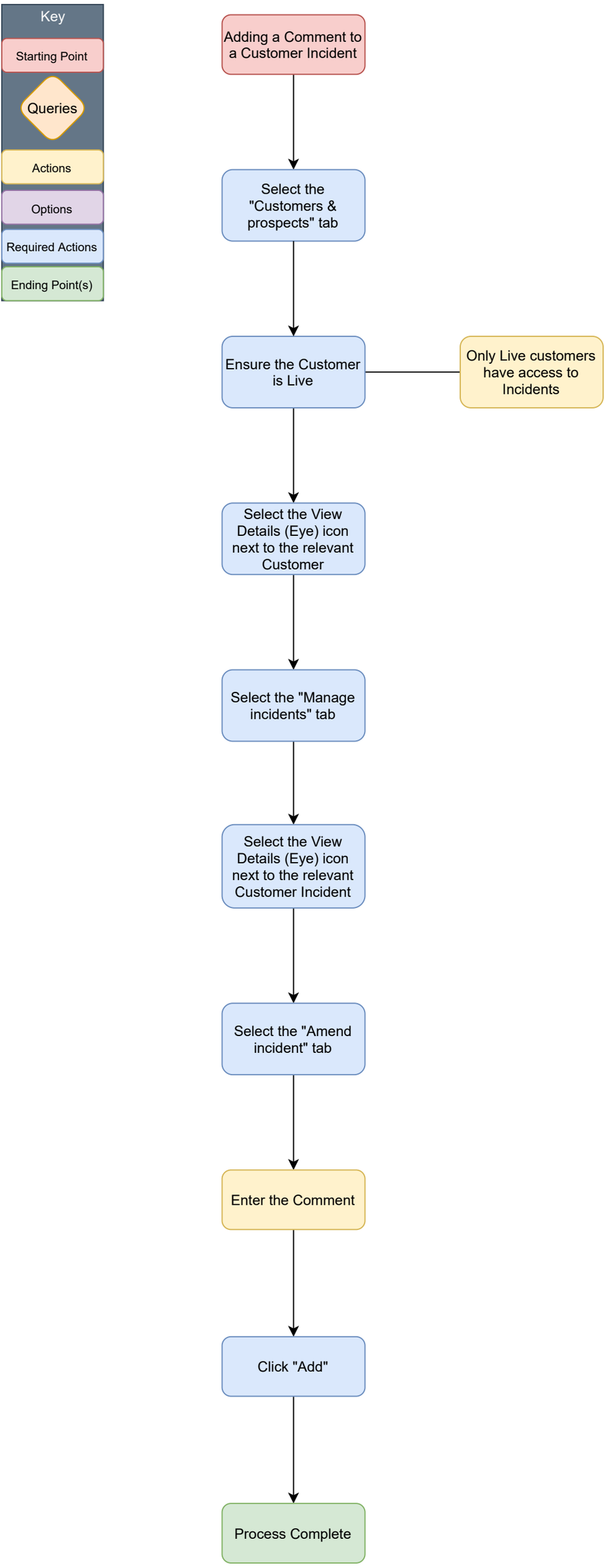
No

Enter the Resolution related to the Incident

Check the "Resolve" box if the Incident has been Resolved

Click "Update/Resolved"

Process Complete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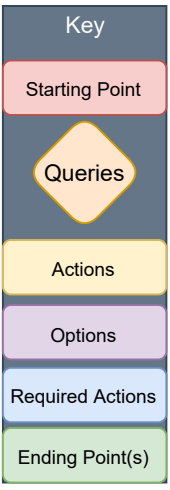
Adding a Comment to a Customer Incident
Select the "Customers & prospects" tab
Ensure the Customer is Live
Only Live customers have access to Incidents
Select the View Details (Eye) icon next to the relevant Customer
Select the "Manage incidents" tab
Select the View Details (Eye) icon next to the relevant Customer Incident
Select the "Amend incident" tab
Enter the Comment
Click "Add"
Process Complete



Deleting a Customer Incident

Select the "Customers & prospects" tab

Ensure the Customer is Live

Only Live customers have access to Incidents

Select the View Details (Eye) icon next to the relevant Customer

Select the "Manage incidents" tab

Press the Delete Button on the Right Hand Side of the relevant Incident

Click "Confirm"

Process Complete