Projects for the CRM

The order that we want the projects done in is the following:

14

15

16

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**1)**    Give Luis editing privileges for Notes.

**1.5)**  Make sure that the sorting function works properly in reports and when looking at Leads, Prospects or Accounts. For example, if you go into the Contact Source Report and choose Jan 1, 2016 to Apr 26, 2016 and you choose to sort by the first column (Count), it will sort of do it right. It shows 9 at the top and then it starts counting down till you get to 4, as you would expect. However, after the last one with 4,  you get to business/support/, which shows 36 and then it counts down again to 35 and 33, after which it shows a list of urls with a count of 3 and then it goes to 25. What's happening is that it's sorting based on the first digit, not the value of the variable.

1.6) Also, you'll notice that the % of Contacts total adds only up to 35%, which tells me it's calculating it in the wrong way. Can you make it give us the percentage of web contacts so that the total is 100%?

1.7) Can you make it so that when a sales person logs into the system it automatically takes them to THEIR OWN Leads page? It's a waste of time when it makes them have to click on a couple of things before they get there. Cory and I would just go to the one that shows ALL leads.

1.8) The CRM should warn the sales person trying to set up a new account, plus it should send an email to the owner of the lead/prospect/account that already exists, to the sales manager and to Luis, when someone tries to create a new customer or lead if the email address or phone number or first AND last name match an existing entry in the CRM. When this happens, a pop-up should appear that mentions this and asks the sales rep trying to create the new account in the system if they still want to create the new account or if they just want to have the rep of the current one notified that he/she talked to the existing rep's customer. If the rep chooses to just have the current rep notified, the current rep and sales manager will get an email with the name, email, phone number and a link to that account, with the subject "[Sales rep name] just talked to your customer [customer name]. If the rep says that he/she still wants to create the new account in the CRM, then the current rep, sales manager and Luis receive an email with the same info, but the subject should say "New account created by [sales rep's name] is duplicate of existing account [existing customer name].

**2)**    Change columns displayed on the screens that show Leads, Prospects and Accounts.

**a)**   New headers should read as Action/Owner/First/Last/Assigned Time/Last Contacted/ Next Contact/State

1. Next Contact should list the Date and Time the next follow up that is scheduled for that account

**3)**    The ability to add branch identifiers for customers that own multiple locations:

**a)**     What exactly I am looking for is the ability to have one account with multiple Branch numbers (these will need to be customizable to identify the branches as the customer does.

**b)**  Each Branch Number will need to have its own primary contact, shipping and possibly billing information associated with it.

**c)**     Under the account tab, where it says Account Name, please make that a drop down menu with an “Add New” button under the original Account Name. When the rep clicks on Add New it should open a new lead form that they will have to fill out the information for the new branch, especially the Branch name (without a unique branch name, they cannot finish adding a branch – the branch name should only be unique for the Account in question – in other words, 2 different customers could have a Branch A, but a particular Account Name cannot have 2 branches named Branch A).

**d)**    Once the new branch name and branch info have been saved, then that Branch Name becomes selectable in the previously mentioned drop down menu on the account page. When the Branch is selected, the CRM will display the information for that specific Branch.

**4)**    For ALL reports:

**a)**     For the Rep field, we need the drop-down menu to have check-boxes next to the name so he can view more than one Rep at a time. Also, if you can create a couple of “groups” with a checkbox next to them so that we can can create a new group and give it a name and add and subtract members from that group, that would be great. When the checkbox next to a group is checked, then all the people in that group are included in the report being generated.

**5)**    Report of Reps’ Queues:  Cory and Luis need to be able to search each rep’s queues and see how many leads they have, NOT just leads that have been assigned to them, but any that are in their queue regardless of the source of the lead or if it has been “assigned” to them or if they entered it in themselves. This applies to Leads, Prospects and Accounts.

**6)** Response Time Report (see Sheet 1 the Report Mock-ups spreadsheet)

* Needs to show the following statistics in MINUTES (each in its own column) during the time period chosen by Cory:
* Average response time
* Longest response time
* Sales
* Total leads assigned
* The percentage of assigned leads that were responded to within 60 minutes or less
* Percent that were responded to between 61-120 mins
* Percent between 121 – 240 mins
* Percent between 241 – 480 mins
* Percent over 480 mins.
* Percent responded to in less than Y hours, where Y is a field that Cory fills. Once he fills it for the first time, that number will remain there whenever he pulls up the Response Time Report, but he can change it whenever he wants. Once he changes it, whatever value was there when he logs out or closes the report will be the value that’s there the next time he opens up the Response Time Report.
* % of Leads for which the first contact was by phone.
* Percent that were NOT responded to (if he clicks on this, it opens a new CRM window that shows a list of the customers that were not responded to at all.
* The total number of leads ASSIGNED in that period. Assigned means that Cory assigned it to them specifically. It excludes ones they created after receiving a call from a potential customer or one that they input themselves into the CRM.
* If a Lead is assigned to someone and then gets reassigned to someone else later (BEFORE it has been responded to by the original rep), then the clock gets reset to zero and starts counting towards the rep that just had it reassigned to him/her.
* The Response Time Report should also be viewable as a table (and maybe a graph) for only 1 rep at a time, over time, showing discrete values for each statistic for each month in the range chosen by Cory. For example, he could choose Erika between February 2016 to July 2016. The system would show a table as shown in Sheet 2.

**7)**  Closing Ratio Reports:

**a)**     What this will do is track the number of leads that have been assigned to or entered into the queue for any given rep in a given date range (date range that Cory or I can choose), then compare how many leads and prospects have been converted to accounts in that same date range. This will give me a Dynamic Closing Ratio (and that should be the name at the top of the report). In theory, this could be over 100%.

**b)**    I also need to be able to pull a report called Specific Closing Ratio, which will track the number of leads that have been assigned or created in a rep’s queue in a given date range and then compare it to how many of those specific leads have been converted to accounts. Under no circumstance could this ever be over 100%.

**8)**  The Contact Statistics Report that currently exists needs to be renamed to Contact Attempts (the word Report is not needed), and it needs to be changed to track ALL contact attempts that are made to all leads/prospects/accounts in the given date range, not just new leads/prospects/accounts that were generated that day.

**a)**   Currently, the Contact Statistics Report allows you to see the Accounts, Leads, Prospects and the Total of them for a period of time, but only for one rep or for all reps. We now want to have the ability to show this report for multiple reps at the same time. Going down on the first column, we will have the name of the reps selected. Like all reports, this will have the dropdown with the checkboxes for each rep and groups of reps. When creating the report, the only variables that Cory can choose are the following:

**(1)**  Date range

**(2)**  A dropdown that has checkboxes for the following types of contacts:

**(a)**   Email

**(b)**  Phone

**(c)**   Both

**(3)**  What kind of Contact Attempts report he wants. Drop-down that has 2 choices):

**(a)**   By Customer Status

**(b)**  By Type of Contact

**b)**  Contact Attempts by Customer Status (report)

**i)**      The headings of the top row should have Accounts, Prospects, Leads, Total. In other words, those are the headings of the columns to the right of the Rep names column.

**ii)**    This report will tally all contact attempts to each lead, account or prospect that has had a contact attempt registered in the Account Info page. It should count it under whatever designation the Account had at the time the contact attempt was made. For example, if they send an email to a Prospect, then it should tally it as an email contact attempt to a prospect, even if by the time that Cory pulls the report that prospect has become an account. If this is too time consuming or complicated for you to do, then the report can instead count it for the account designation the account has at the time the report is pulled.

**c)**   Contact Attempts by Type of Contact (report)

**i)**      The headings of the top row should have Calls, Emails, Total. In other words, those are the headings of the columns to the right of the Rep names column.

**ii)**    This will show the total calls, total emails and the sum of those totals for ALL types of accounts (Leads, Prospects and Accounts).

**9)**  Add Lead Source

1. report that allows us to see where each type of lead that is in the system comes from based on how it is labeled in the system. This report will be a comprehensive list of where each lead in our system originated from.
2. Currently a lead in our system is identified with the following marker options :
   1. **Internet Search**
   2. **Referred**
   3. **Social Media**
   4. **Trade Show**
   5. **Other**
3. This report will utilize these filters as well as any additional filters that we can use to create a detailed report of the origin of the leads.
4. When you run this report a start and end date will need to be selected. The initial report that appears will have the above filters applied, and next to the filter will be the total that came from that source.

|  |  |
| --- | --- |
| Internet Search | 5 |
| Referred | 22 |
| Social Media | 2 |
| Trade Show | 33 |
| Other | 12 |

* 1. Each option listed above on the left should be clickable and when you click on it it will display each lead in that catagory

1. This Report should give us a complete picture of where all of the leads in the system come from.

**11)** Individual trade show listings in Lead Source drop down

**a)**

|  |  |  |
| --- | --- | --- |
| ISSE | Long Beach | Jan 30 - Feb 1 |
| CDS Midwinter Meeting | Chicago | Feb 25-27 |
| International Beauty Show | New York | March 6-8 |
| Int. Esthetics, Cosmetics & Spa | New York | March 6-8 |
| Americas Beauty Show | Chicago | March 12-14 |
| Face & Body | Chicago | March 12-14 |
| Thomas Hinman Dental Meeting | Atlanta | March 17-19 |
| Oregon Dental Conference | Portland | April 7-9 |
| International Congress of Esth & Spa | Philadelphia | April 10-11 |
| International Congress of Esth & Spa | Arlington/Dallas | May 15-16 |
| Premiere Orlando | Orlando FL | June 5-6 |
| Inter. Esthetics, Cos, & Spa Conf. | Las Vegas | June 25 -26 |
| International Beauty Show | Las Vegas | June 25 -26 |
| International Congress of Esth & Spa | Long Beach | Sept 11-12 |
| Smart Tan | Nashville | Oct 7-9 |
| International Congress of Esth & Spa | Miami | Nov 6-7 |

**b)** This is so that each trade show's leads can be tracked separately in our system.

**12)** Once you select “Trade Show” as the lead source then a secondary dropdown menu needs to become active which will list all of the trade shows for the year.

Each trade show will not only need to have the Name of the show and the location it will need to have the complete dated (month/day/year) as many of the shows are repeated each year and we need to ability to search each show individually.

**10)** Ability to attach files to the accounts (or generate the sales order that will be saved) in the CRM to easily view previous orders (I can provide the sales order formats that will need to be selected from)

**a)**     This will be the ability to upload and save PDF's to each account (or the specific branch within the account)

**13)** Currently the reminder/follow up feature of the CRM does not stand out enough. It places a small alert at the top of the screen in the CRM stating that a specific lead has a follow-up due and prior to the start time it pops up a small reminder window.

1. I want to Change the follow up reminders in the following way:
   1. Change the reminder at the upper left of the page to be approximately 25% larger
   2. Change the color of the reminders to black lettering on a orange background
   3. Make the Pop-up reminder that pops up 25% Larger
   4. Color the Pop-up Reminder yellow with Black Lettering
   5. Give the pop-up Reminder a "Snooze" button. Make it a drop-down menu with the following choices:  5 minutes, 15 minutes, 1 hour, 2 hours, 4 hours, 24 hours. It  would pop back up at the selected time interval.
   6. Currently, Reminders and Follow-ups generate an email to the sales rep, but it's not very clear to us when those emails are programmed to go out. Can you make it so that the reminder email goes out 15 minutes before? If someone creates a Reminder or Follow-up for a time that is less than 15 minutes in the future, the reminder should come 2 minutes before the event. If they set a Reminder for less than 2 minutes in the future, you should make their computer explode on them and put up an ad on Craigslist for a new sales rep.
2. If the sales person enters a new contact (email or phone) in the CRM for that customer 30 minutes or less before the scheduled time of the follow-up, the reminder needs to be dismissed. Dismissed means that the Reminder needs to be removed from the reminder area at the top of the page, and the pop-up reminder for this specific follow-up should not pop up.
3. The CRM needs to alert the rep any time there are conflicting reminders set - If the rep has set a reminder for 10am on tuesday for a lead and then tries to set another reminder for a different account for 10am on tuesday the CRM needs to let them know right away that there is a conflict and not let them set a second reminder at that same time.

**14)** Create 2 new Reps in the CRM “Contacted Marketing” & “No Contact Marketing”

**a)**     This is to be used for all leads and prospects that reach the time limits I am putting in place for reps to have them (see projects 15 & 16). These will be the queues that our Marketing Department will use for their new business marketing efforts.

**15)** Leads to be automatically removed from each rep's LEAD queue after 30 days and put into No Contact Marketing rep as a LEAD.

**16)** Prospects are to be automatically removed from the reps Prospect queues after 60 days and put into the Contacted Marketing rep as a PROSPECT.

**a)**   Add a check box on the information page of a Prospect that will extend the automated removal date by an additional 60 days (if the checkbox is checked). The box can only be checked ONCE.

**17)** Similar to how follow up reminders are supposed to show up in the CRM, every time an existing lead/prospect/account contacts us through the sidebar contact form it needs to notify the rep in their CRM that the person or company has made contact and it needs their attention. The sidebar contact form is the form for contacting us that is on the right side of most of the web pages on beamingwhite.com. There are other ways to contact us on the website, so by sidebar we are only referring to the contact form on the right of most of the pages.

1. Currently all the CRM does in this situation is send an email to the assigned rep that states there has been contact
   1. Please change this to every time a sidebar contact is made by a lead/prospect/account it automatically sets a reminder in that lead for the time that they sent in the sidebar contact.
      1. With these reminders please have them show up at the top colored with a blue background with black lettering
      2. Also have it immediately trigger a pop up like a standard follow up reminder that will need to be dismissed by the rep

**18)** Integrating emails into CRM.

·      Making the CRM send automatic emails. Step 1 is to have a field where the rep enters the first email they send to customer and if no activity the CRM sends that email with some minor additions in the first line at predetermined times if there has not been any contact since.

**19)** Reminders for follow-ups.

·      Calendar for reminders – still shows a reminder even after I marked on the account that I had contacted them.

·      Report for Cory for follow-ups

1. A report needs to be structured in the system to be able to pull the report and see how many follow ups were created in the system each day (for either that day or subsequent days), how many scheduled follow ups had been put in place for any given day and how many of the accounts with follow ups scheduled actually had additional contacts logged into the CRM that same day.

**20)** Entering every sale into the customer’s account

**·**  Create a field on the main page of the lead where a date and dollar amount can be entered. (Very similar to the “Note” field currently) This field will allow the rep to enter in the date of sale as well as the amount of the sale.

**·**   As more sales are entered in, the information field should grow like the notes showing an ongoing list of sales and dates.

**·**    Just above the fields where you enter in the date and amount of sale there needs to be a Total: that reports the ongoing total of sales for that account.

**·**    Each sale will need to be tagged or identified with the rep that entered it into the account

**21)** Commission reports of sales

**·**   This report will require the entering of the start and end date for the report and will pull the amounts reflected in the accounts that have had any sales in that given time period.

**·**   The information will be divided up by rep that entered in the sale.

**22)** Number of phone calls made, received, total, minutes if possible.

1. We will provide you with the Ring Central API for you to integrate their Click to Call feature into the CRM
2. We would like to be able to pull reports about the calling happening within the CRM. Please look into the API and see if we can build the CRM to pull those reports or if we will need to use the Ring Central Reporting feature to get this information

**23)** Look at Lead shanw@acutemarketingsolutions.com - it was showing the city as Houston, the country as USA yet the state was CH. How can that be? Was that from Chihuahua, Mexico or CH as in Switzerland or what? In any case, if they choose USA

**24)** I'd like the CRM to notify us any time an active account does not have any current activity in a predetermined time period.

a)     Please add an “order frequency” field with a drop down menu list of 30/60/90/120/180 Days. Place this field next to the new field entered for item 20

b)    Once one of the options is selected it needs to start a timer that will send an email to the account owner, sales manager (Cory) and all CSR’s when the account does not have a new sale entered into the system in that time frame.

c) Have the CRM send an email from [customer.info@beamingwhite.com](mailto:customer.info@beamingwhite.com) to customers that have not ordered within the time frame. After sending the email, the system should resend the same email 30 days later IF, and ONLY IF, a new order hasn't been entered into the customer's account before the 30 days are up. It should also send the email to account owner, sales manager (Cory), and all the CSRs. If a new order has been entered, then the timer countdown should be reset to the number of days in the "order frequency" field and the process above and below should be repeated.

i) If it's a Beaming White customer (as defined by the SOLD BY field), the email would go as follows. In the From field on the customer's email account it should say Beaming White Customer Service. The email should consist of the following:

"Dear [customer first name from contact field],

It has been a while since your last order of teeth whitening products. We just wanted to make sure everything is going well and to remind you to check your supplies. Just call us at 360-635-5600 to place an order or email us at [bwsales@beamingwhite.com](mailto:bwsales@beamingwhite.com). We are here for you.

Thanks - The Beaming White Team

ii) If it's a Cliona customer (as defined by the SOLD BY field), the email would go as follows. In the From field on the customer's email account it should say Cliona Beauty Customer Service. The email should consist of the following:

"Dear [customer first name from contact field],

It has been a while since your last order. We just wanted to make sure everything is going well and to remind you to check your supplies. Just call us at 360-635-5600 to place an order or email us at [info@clionamedical.com](mailto:info@clionamedical.com).  We are here for you.

Thanks - The Cliona Beauty Team

iii) If it's a Sapient Dental customer (as defined by the SOLD BY field), the email would go as follows. In the From field on the customer's email account it should say Sapient Dental Customer Service. The email should consist of the following:

"Dear [customer first name from contact field],

It has been a while since your last order of teeth whitening products. We just wanted to make sure everything is going well and to remind you to check your supplies. Just call us at 360-635-5600 to place an order or email us at [info@sapientdental.com](mailto:info@sapientdental.com). We are here for you.

Thanks - The Sapient Dental Team

**25)** In the Contact Source report it usually shows the url that the leads come from, but I notice some really long ones like this one:  <http://www.beamingwhite.com/business/supplies?gclid=CjwKEAjwlq24BRDMjdK7g8mD6BASJABBl8n30AAUDhUxommB0Yfk0ip1jwwAGBpRsygWFLkUmjfH0BoCGBvw_wcB>

* Is that because they contacted us from the landing page on our website that a Google ad sent them to?

**26)** Is it possible to use cookies to track what pages on our site (and in what order) someone visited before they sent us the request? Right now the emails we receive tells us from what page they filled out the contact form, but we don't know what pages they visited prior. If you can capture that and include it, that would be great. If so, it would be nice to have a report that gives us a list of all the pages that were visited by people that filled out a contact or registration form. We would choose the date range, and the table would consist of 2 columns:  1) the URL  2) the total number of times that people that filled out a contact form visited that page. If it's not too difficult, it would be nice to

**27)**  If the reps can't yet create any reports, we should probably let them see certain reports about their own performance.

28) Search function doesn't work very well. For example, if I put in the customer name VA Group, you get a list of a ton of companies that have the word "Group" in their name, but I can't find VA Group anywhere near the top of the results. I don't think they appear even on the first page. Can you please fix this?

1. Please make it so that the search function also searches the Secondary email.

29) Transfer information in the CRM queue’s the following way….

* All leads, prospects and accounts under Ryan Fitzgerald moved into Michael Darby’s queues.