heap

WBP|SYSTEMS

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Who needs Customer Relationship Management?

"We're a small business, we don't have, or need, a CRM"
—Small Business Owner

Every business has customer relationship management (CRM): If they create note cards and put them in a file cabinet, that's their CRM. If they use a master rolodex and put it in one person's office, that's their CRM. If they post notes up against a wall, that's their CRM. If you grasp only one idea let it be that customer relationship management is not software, it's an idea. Depending on the needs of your company, you may want the support of software.

A perfect example of a company with no software assistance, but still has excellent CRM, is the local coffee shop I frequent. A lead (or prospect) walks through the front door; they help the lead decide what product may suit their needs (if necessary) then record the order and deliver the product. If the product is flawed in one way or another, they fix the problem on the spot.

Conversely, one of my clients is a commercial real estate firm that works on deals spanning tens of millions of dollars. Potential customers spend months as leads and opportunities; time occupied with hundreds of phone conversations, thousands of emails and, at times, the involvement of dozens of agents. In this situation, they need detailed information about the probability (and value) of a purchase on a per lead or opportunity basis, and as a complete collection. They need to be able to segment and separate by a multitude of factors so they can acquire an accurate picture of future sales, performance of their marketing and the effectiveness of particular agents. They need to store all contacts, events and files in an accessible central location. They need an automated system to make sure they never leave a prospect behind and this system must not interfere with their existing workflow, in fact it should make it more efficient.

In the formers circumstance, a report on the probability or value of a lead is unnecessary because the total time of the transaction is, at most, a few minutes. There is no need to have an automated (or otherwise) schedule for followup because they can simply ask if there is an issue with the coffee. And of course, there is no fear of leaving a prospect behind because they are in the same room as the sales agent for the entire transaction.

What makes these two situations different? There are three key factors:

- The time spent on each transaction
- The value of the purchase
- The number of representatives involved

If your business has long transaction times, the value of each customer is high, or you have multiple people involved with a single customer, you need CRM software. If you qualify on multiple points, a CRM system will dramatically improve your business efficiency and reduce the cost of lost sales.

What a CRM will do for your Business

A properly implemented CRM should:

1. Store information about leads, opportunities and customers so that all the people involved stay informed
2. Act as a central shared system for contacts, calendars and files
3. Use reminders to make sure that you never leave a prospect behind
4. Determine the effectiveness of marketing, industry segments or pretty much anything else
5. Integrate into your existing workflow
6. Reduce administration costs

Naturally, the reward of a CRM will vary across industries. A hair salon, dentist and architect all benefit from the centralized location of information and files. But only the architect would take advantage of the management of prospects (i.e. leads and opportunities) or the automation of tasks. With this in mind, you should adjust both the budget and urgency in which you implement a CRM based on its overall benefit.

Heap's place in the CRM Universe

Heap is primarily for small business, the market neglected by large CRM software companies. This results in a few assumptions about our customers:

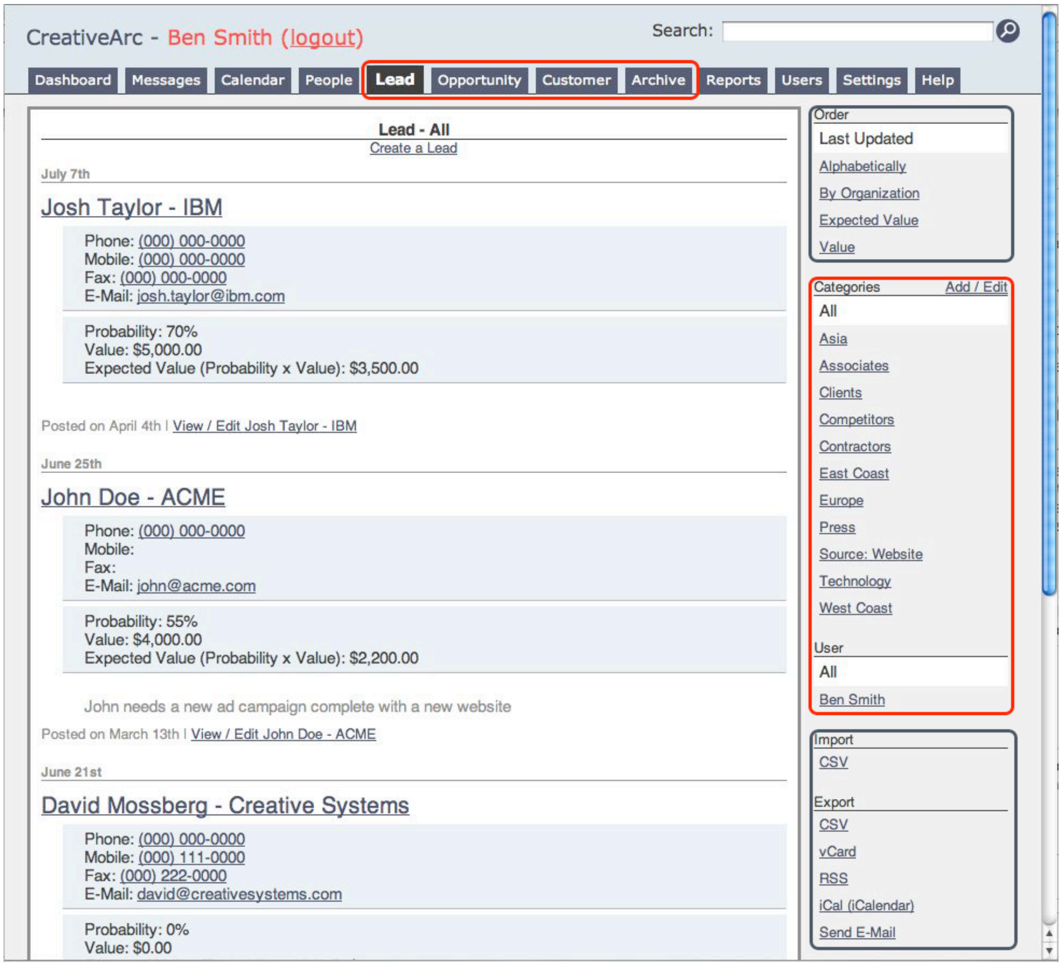
- You trust your users (employees)
- You would prefer simplicity over complexity
- You may need this product on a variety of computer systems (small businesses tend to have more heterogeneous environments)

If you don't trust your users, you should look at NetSuite. If you need a seemingly endless number of features, you should look at SalesForce.

Heap will never lock an user out of the majority of the application and it will never have as many knobs to twist as SalesForce. While we are always refining Heap, there are some core principals that we will never violate. If this sounds like software that would help your company, then welcome to the Heap CRM platform, let's have a look around.

Heap in Two Minutes or Less

Heap is organized into a series of tabs across the top of the screen and filters and options on the right hand side (only on some of the pages).



The tabs circled in red are the key parts of the application. Lead, opportunity and customer are the three basic stages of a sale. Once a customer is no longer active and you want to get it out of your way, you archive it (you can delete but it's better to just archive).

The tabs "messages," "calendar" and "people" (contacts) are exactly what they sound like. But any message, event or person can be associated to a lead, opportunity and customer. In essence these areas feed information into the sales process.

"Reports" and "dashboard," in contrast, **take** information from the sales process. In the case of reports you can use dates, categories and users to filter and get a wide variety of information. The dashboard is a snapshot of events in the next 14 days as well as recent activity.

The categories and users (circled in red on the right) act as filters. When you have "All" selected in the categories section, for instance, that means to show everything regardless of category. If you select "Asia," however, it will only show items in the "Asia" category. Users work the same way, if you select "John Martin" you will only see items associated to that user. If you select both "Asia" and "John Martin" you will only see items that are associated to both John Martin and Asia.

The blue areas on the left are options for the current list of items. In the case of "Order" it simply takes the list you are currently looking at and reorders them in a number of ways. The export function, exports the current list of items, while import inserts items into the category you are currently viewing.

Core Concepts in Heap

Before we dive into the nitty-gritty of Heap, it helps to understand some fundamental concepts. Throughout this manual you should keep four key ideas in mind:

1. Categories are King
2. Heap is Always Open

3. Everything is a Message
4. It’s all about Associations

I. Categories are King:

People, leads, opportunities and archives can be members of many categories. Why do you care? Well, categories aren't just for organizing stuff, they are also used extensively for reports. Think of it this way, let’s say a lead is a banker, he is on the east coast and he was generated from your website. If you put that lead in all three of those categories (bankers, east coast, website), when it comes time to run a report, you’ll find out exactly how well you are doing on the east coast, or with bankers or with the leads generated from your website.

II. Heap is Always Open

The concept of always open has two parts. First, it’s about users. As I said before, Heap assumes you trust your employees. So, there are only two types of users: those who are admins, and those who aren’t. Admins have a few special privileges. First, admins can reset a password on an another user. Second, they can create, edit and delete users. And third, they can enter their credit card to pay the monthly Heap account fee.

Notice, I did not mention anything relating to the sales process or running reports or any “admins only section.” The standard user is allowed in virtually every part of the application. Secondly, Heap does not trap data. Not only is everything exportable, but in the case of RSS and iCal files, the data is a live feed. So I can be in my desktop calendar application, for instance, and see changes to schedules as they happen.

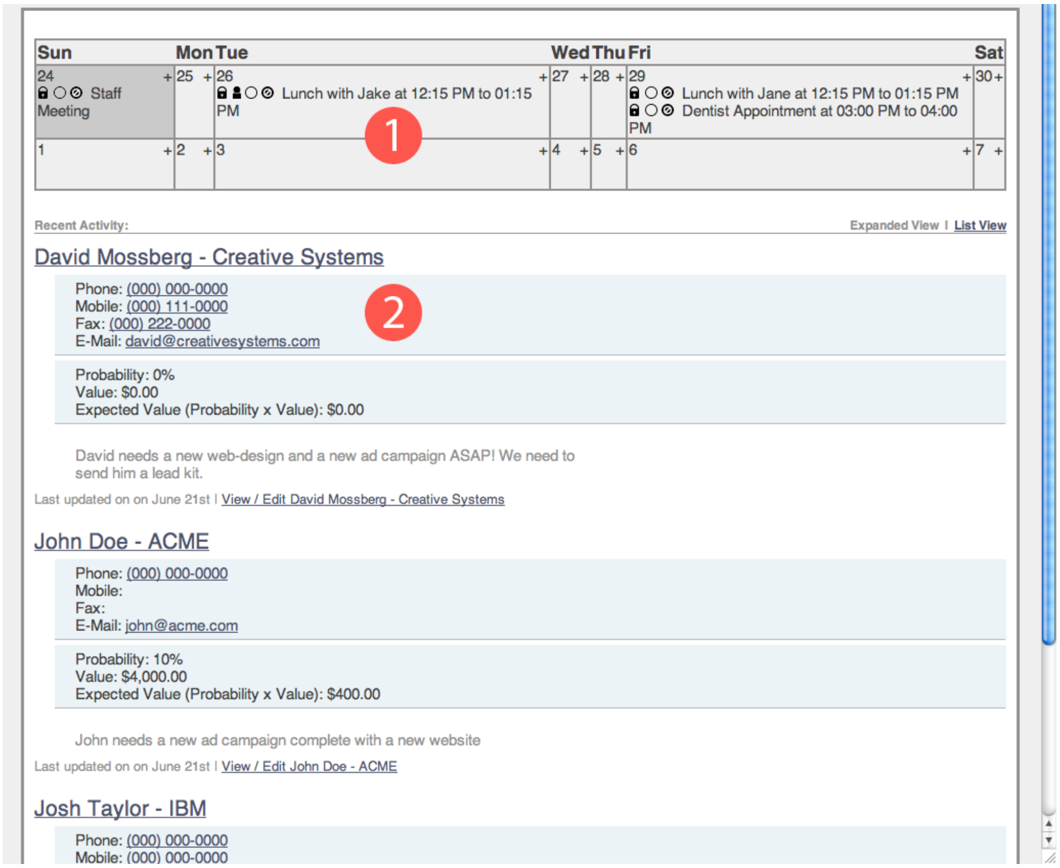
III. Everything is a Message

Ok, so “everything is a message” is probably overstating it, but, in most cases if you want to store some information, it should be in a message. Messages can be just some text, but they can also be formatted with pictures, have a bunch of files attached or even have comments. In the near future, you will also be able to import emails into Heap, when that happens, you will import them as messages.

IV. It’s all about Associations

But, all the messages in the world won’t do you a bit of good if you can’t find them. That’s why there are associations. Associations are links that take data (like messages and calendar events) and put them into a lead, opportunity or customer. So when you are looking at “John Doe” the lead, you see all of the calendar events and messages (and files) that relate to John Doe.

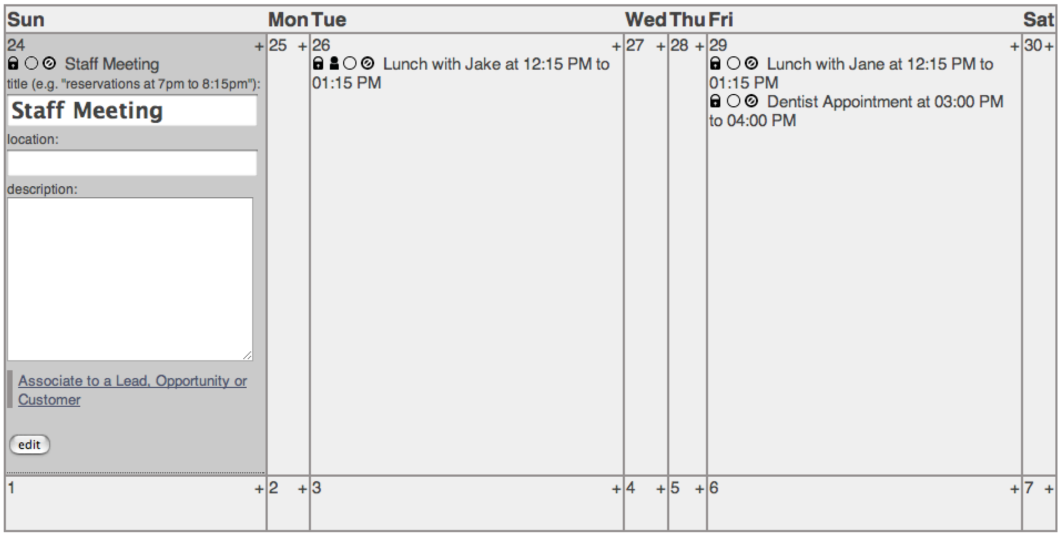
The Dashboard



The dashboard is your view of what you need to get done.

1 is a 14 day calendar (starting on today) showing both events and task on your "My Calendar." **2** is a list of the most recent leads, opportunities and customers where you are one of the managing users (i.e. those items that are under your responsibility).

You can click on an event or task and expand it (in this case I clicked on "Staff Meeting"):

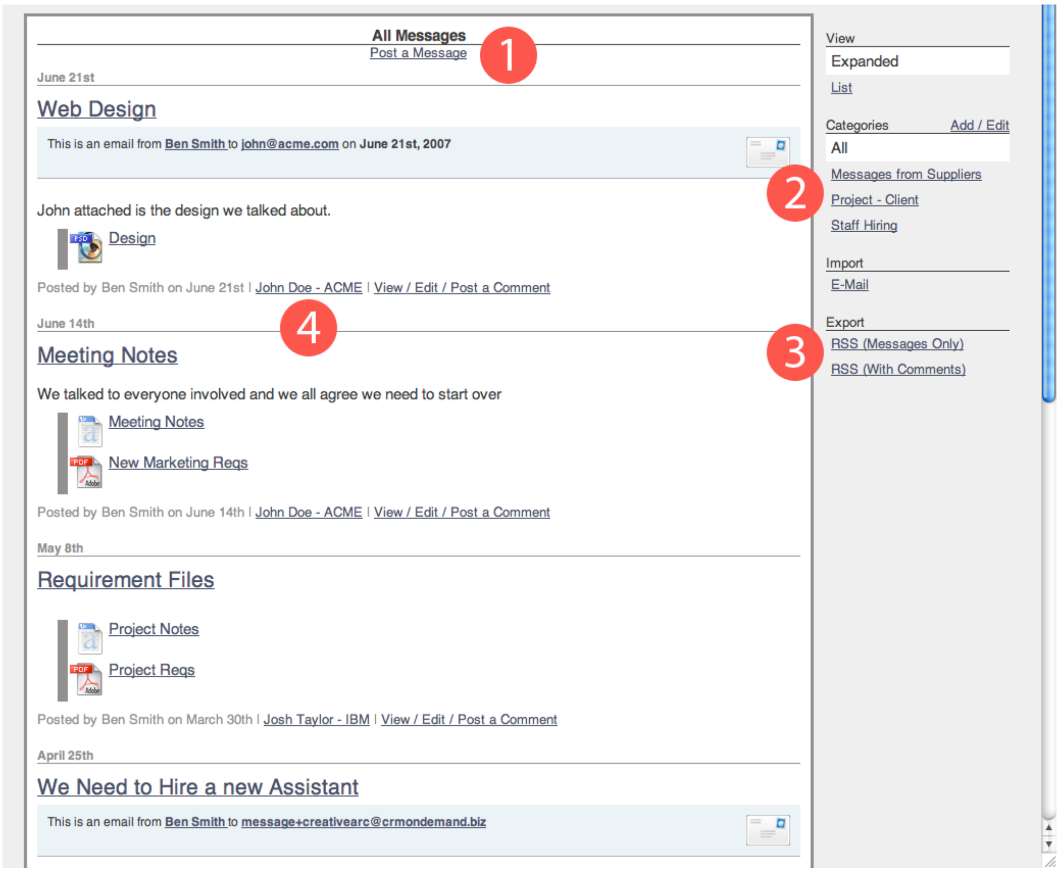


From here you could edit the title, location, description and associate it to a lead, opportunity or customer. If you edit the title and include a time, this task will convert to an event.

Times can be accepted in a variety of formats, but the key is the word "at." For instance, if I put "Staff Meeting **at** 7pm" in the title, Heap will understand, but if I put "Staff Meeting 7pm" instead, Heap will think that entire phrase is the title of a task and there is no time. You can also put start and end times in the title using the operator "to." Let's say the staff meeting is suppose to go two and half hours; I could put "Staff Meeting at 7pm **to** 9:30pm."

Clicking on any of the items in "Recent Activity" and it will take you to the details page for that lead, opportunity or customer. If you click on the email or phone number then Heap will either open up your email application or call them with Skype.

Messages



Messages are the place where you take notes, upload files and comment. Let’s look at a few of the sections.

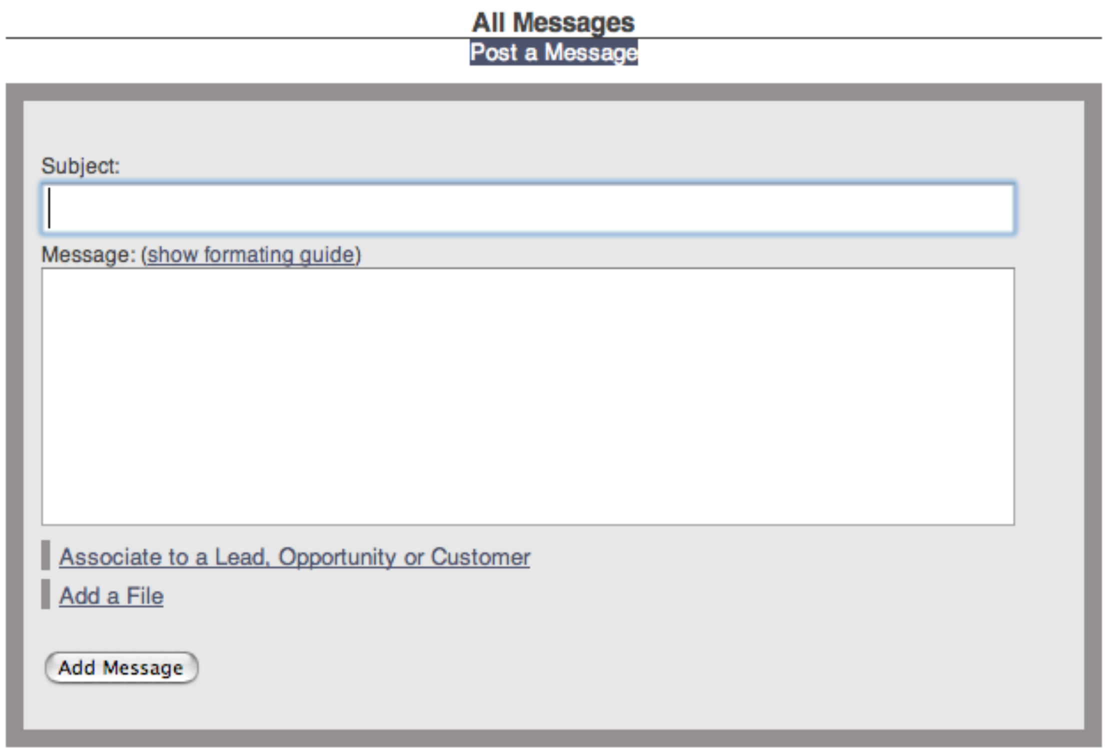
1 is where you click to post a new message. It should be noted, that by default any message you post will be posted in the category that you are currently in. In this case, being you are in all messages, the message will not be posted in a category at all.

2 is your list of categories. You can add, edit or delete a category by clicking on the “Add / Edit” button.

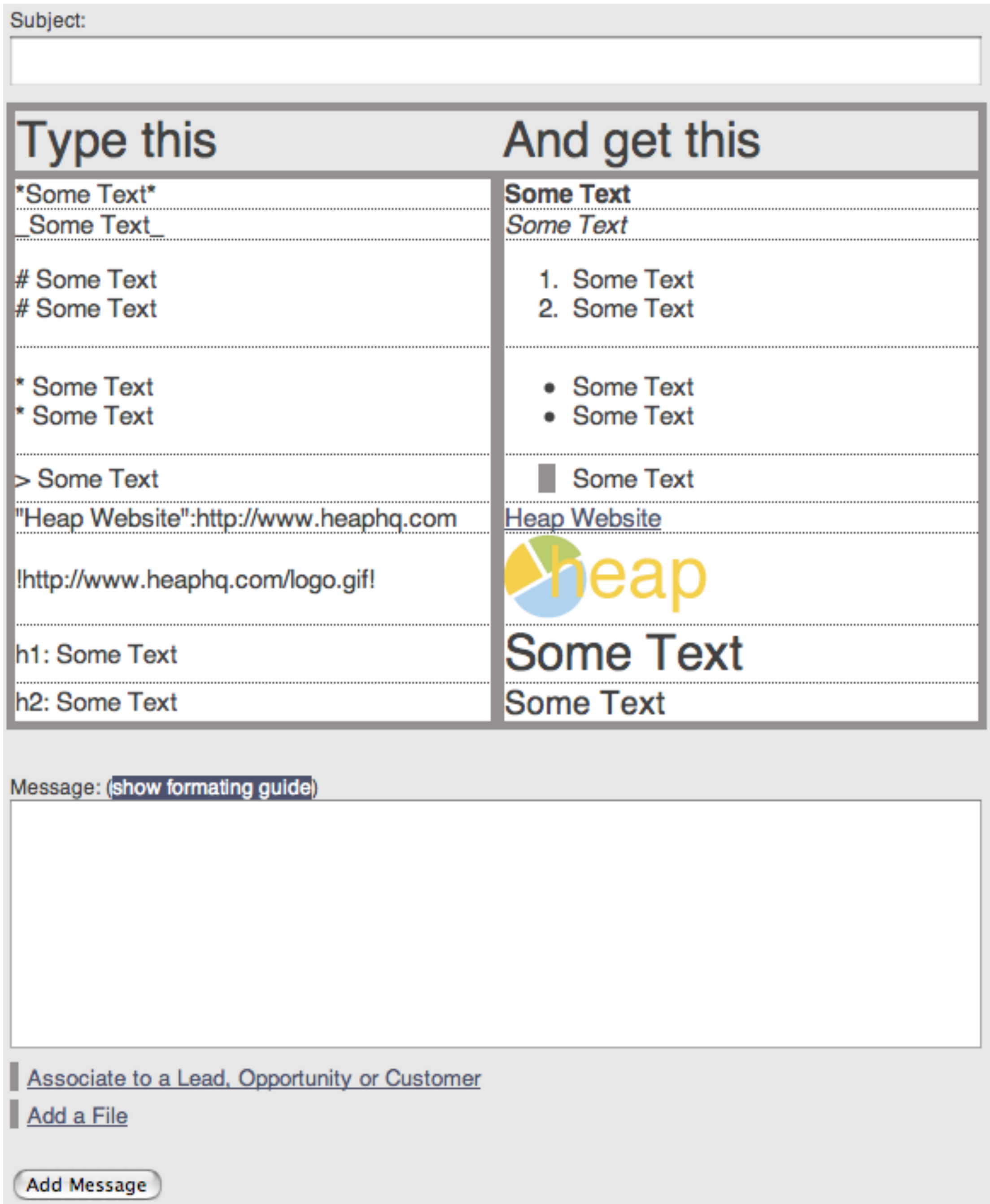
3 is the RSS feeds for the messages section. RSS is a technology that allows you to be updated of changes without having to actually visit the site. Remember, when you export; you export what you are looking at. So if you subscribe to a feed when you are looking at "All Messages" you will get a feed containing all messages. But if you subscribe to a feed when you are in one of the categories, you will only get messages in that category.

4 simply shows you the association and category of message. Clicking on the name of the category will take you to that category. Clicking on the name of an association will take you to that lead, opportunity, customer or archive.

Let's post a message. I'm going to click on "Post a Message."

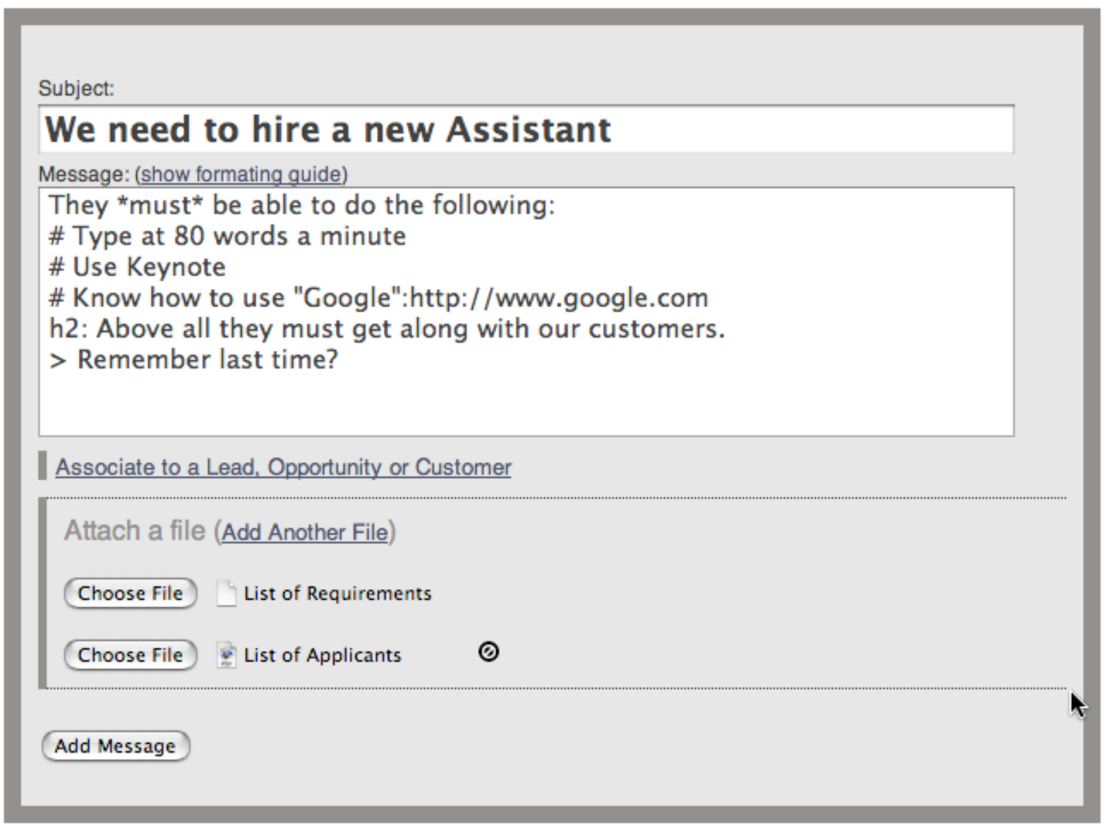


Notice the "show formatting guide." This allows you to add formatting to your message. Let's click on it now.

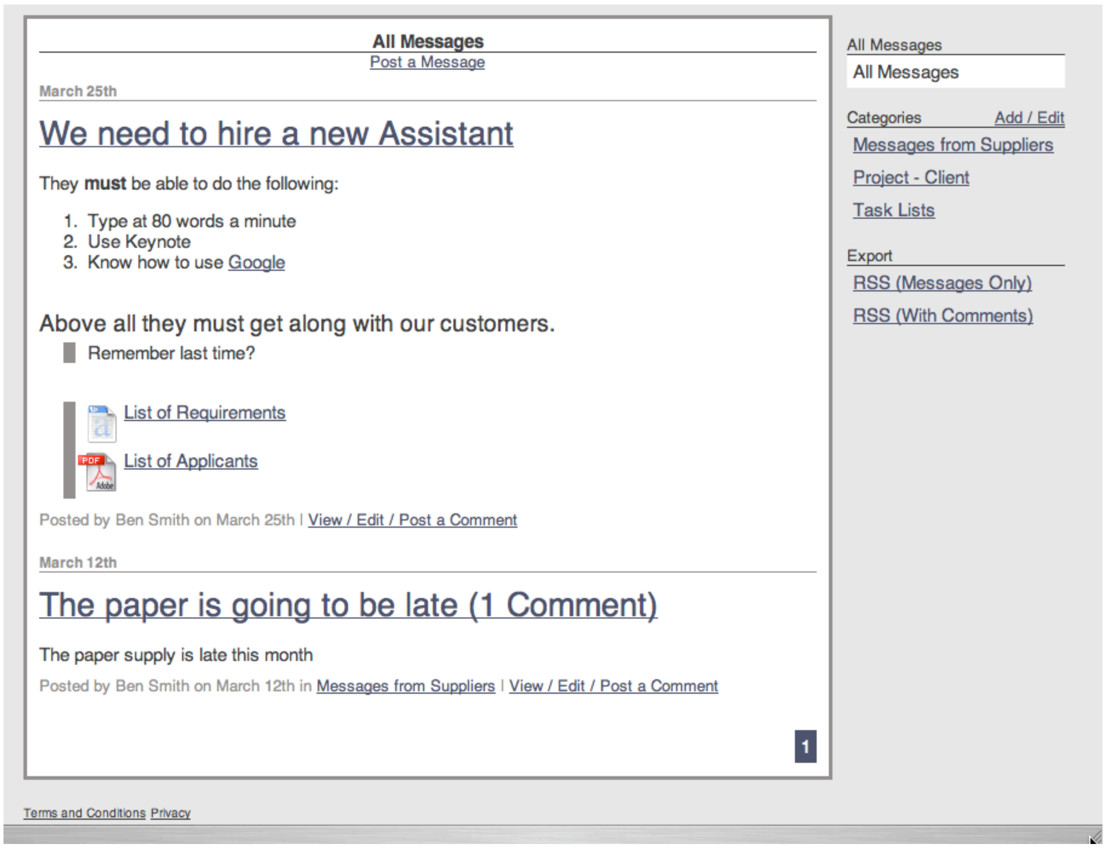

Subject:
Type this
And get this
Some Text
Some Text
Some Text
Some Text
Some Text
Some Text
1. Some Text
2. Some Text
* Some Text
* Some Text
• Some Text
• Some Text
> Some Text
Some Text
"Heap Website":http://www.heaphq.com
Heap Website
!http://www.heaphq.com/logo.gif!
heap
h1: Some Text
Some Text
h2: Some Text
Some Text
Message: (show formating guide)
Associate to a Lead, Opportunity or Customer
Add a File
Add Message

With this guide I can have a bulleted list (using *) or include a picture (using a ! on both sides of the picture's web address) or link to a website.

I'm going to write a message, using some of the formatting guide. I've also decided to get the formatting guide out of the way (by clicking on "show formatting guide" again) and I've decided to upload a couple of files by clicking on "Add a File."



I could have as many files as I want by just clicking on "Add another File." I also could associate this message with a lead, opportunity or customer by clicking on "Associate to a Lead, Opportunity or Customer." But it's fine, so I am just going to post the message.

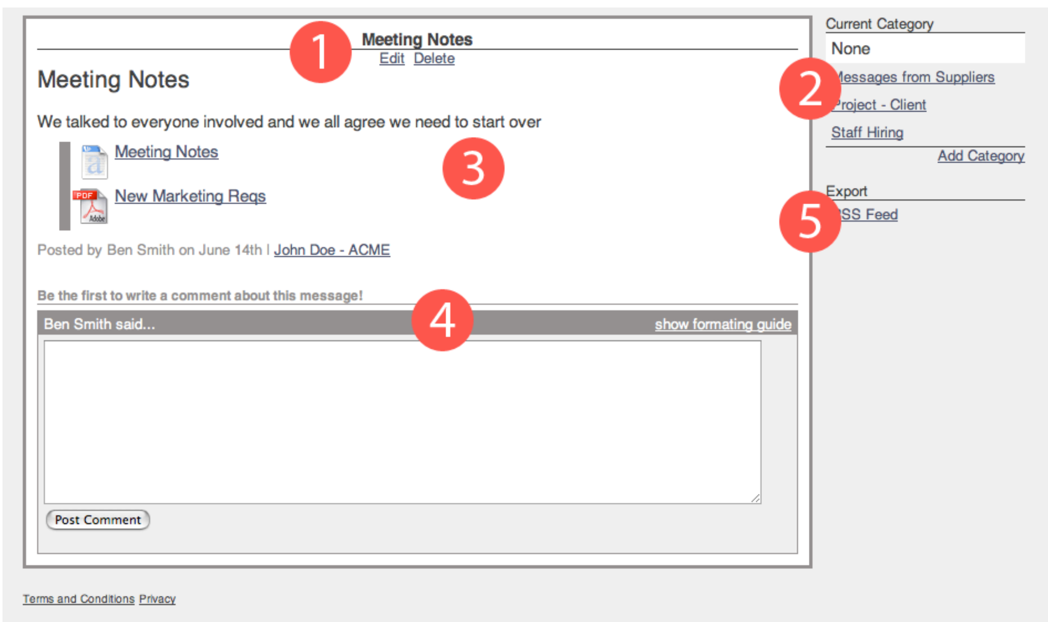


I want you to notice a few things:

1. Look at the formatting, see how the formatting guide effected the message.
2. Look at the two uploaded files. See how Heap automatically detected the type of files (in this case a word document and a pdf).

3. Also notice that unlike the message below there aren't any comments on this message. Let's change that.

I am going to click on the title "We need to hire a new Assistant." I could also click on "View / Edit / Post a Comment" (the links are identical).



1 is the title of of the message, an edit button and a delete button.

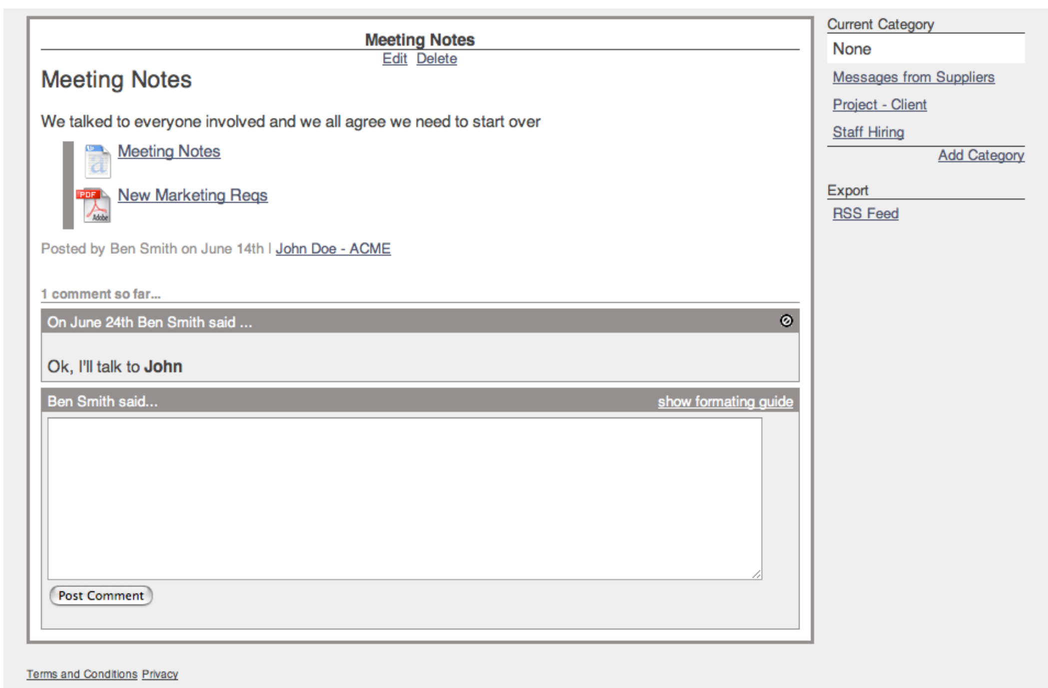
2 is the current category, as you can see at the moment the message isn't in a category at all (that's because we added the message while in the "All Messages" section, if we added while in a category, it would be in that category and in "All Messages").

3 is the message including the attached files.

4 is the comment section. You should notice that the "show formatting guide" is here as well, so you can use the same formatting guide on comments as on messages.

5 is yet another RSS feed. This one is just of this message and its comments. If all this talk of RSS is a bit new, don't worry we will cover RSS readers (or aggregators) later in this book.

Let's write a comment:



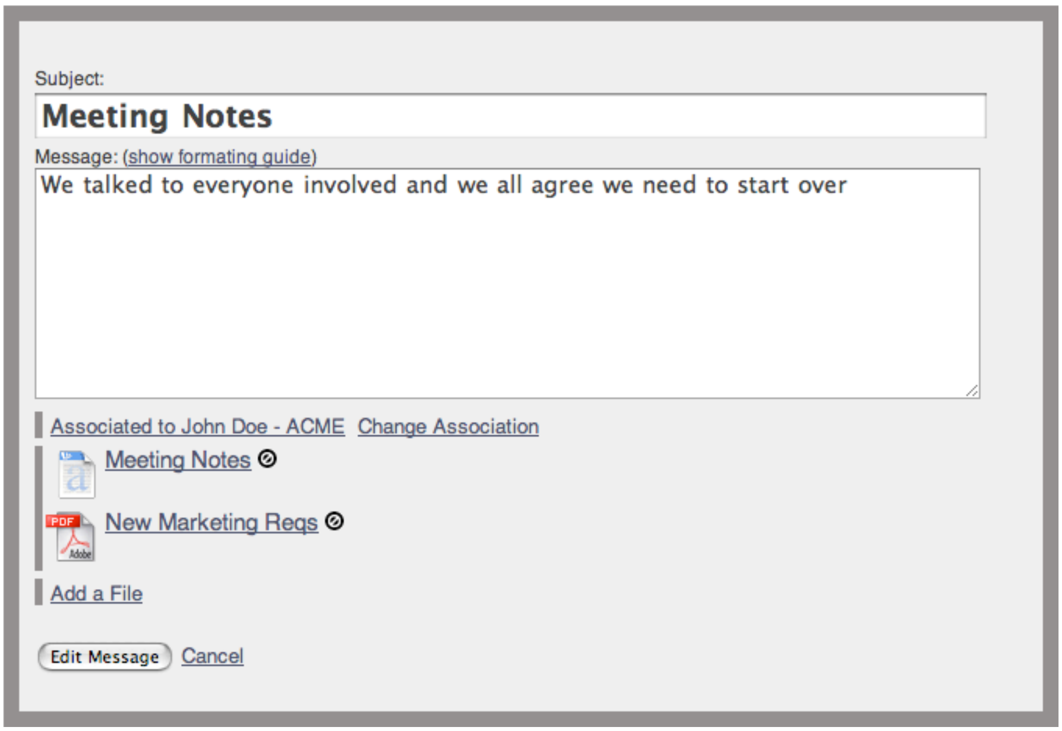
Take note of a few things:

1. In the darker grey area, it says the date of the comment, followed by the comment.
2. We used the formatting guide in the comment, specifically the bold.

3. The comment can be deleted by clicking on the delete icon (⊘).

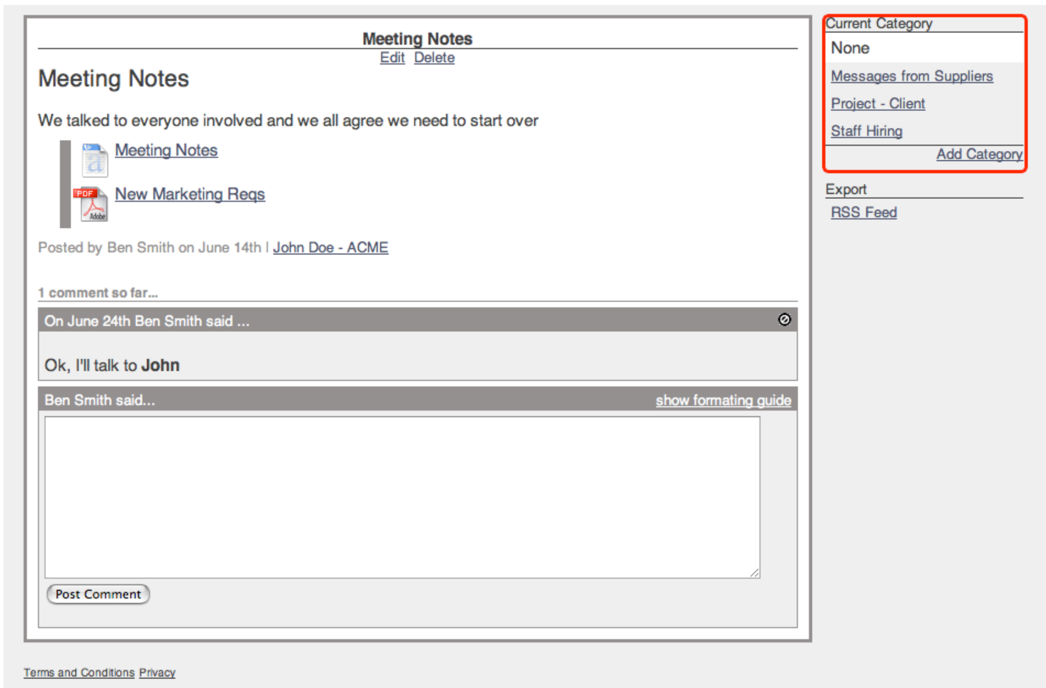
Comments are a great way to keep discussions organized. They can be as long as you wish and there is no limit on the number of people who can be involved.

Let's edit the message. All I have to do is click on the "Edit" up at the top center of the white area.

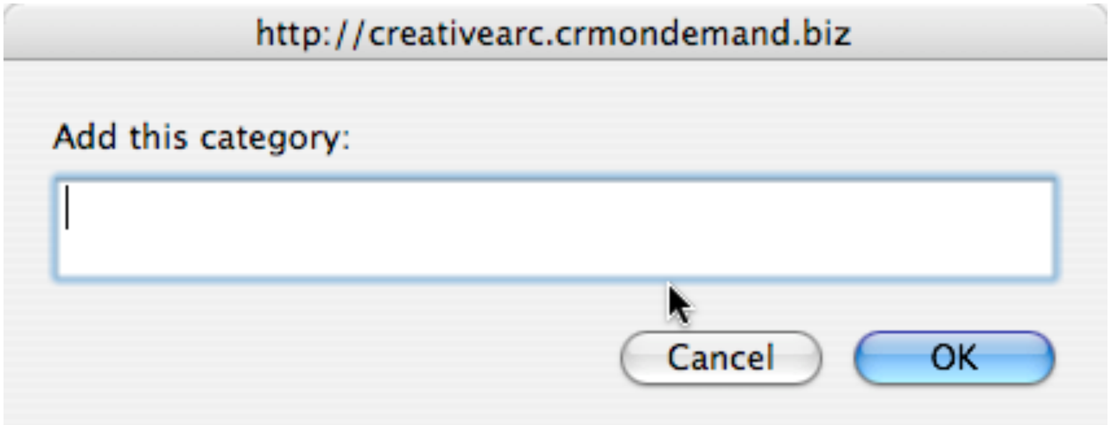


So you could do many things from this edit page. You could edit the message; associate it to a lead, opportunity, or customer; add more files or delete files (by clicking on the ⊘ next to the file's name). But in this case I'm just going to edit the message.

Categories are great for organizing messages, they let you subscribe to more specific RSS feeds and find messages faster. Unfortunately this message isn't in a category (because when we added the message we were in "All Messages" and not in a category). Let's change that.



Now, I could change the category simply by clicking on the category (they are listed in the section circled in red). But now that I look at it, none of these categories really match what we need, so I'm going to create another. Click on "Add Category."

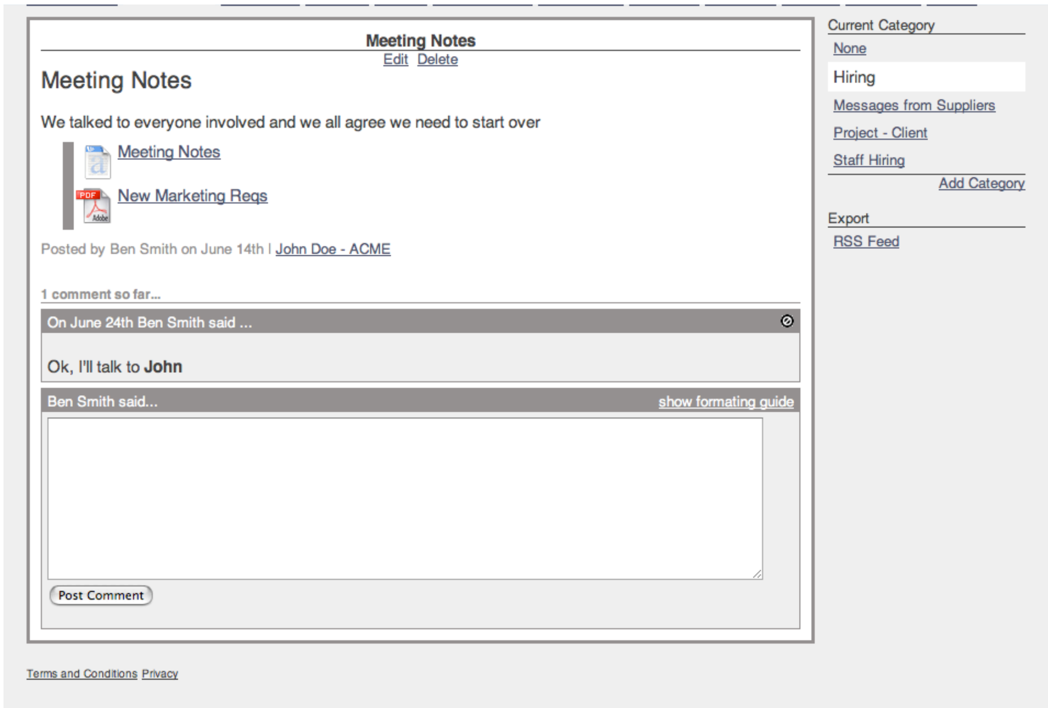


NOTE: Internet Explorer 7 Users

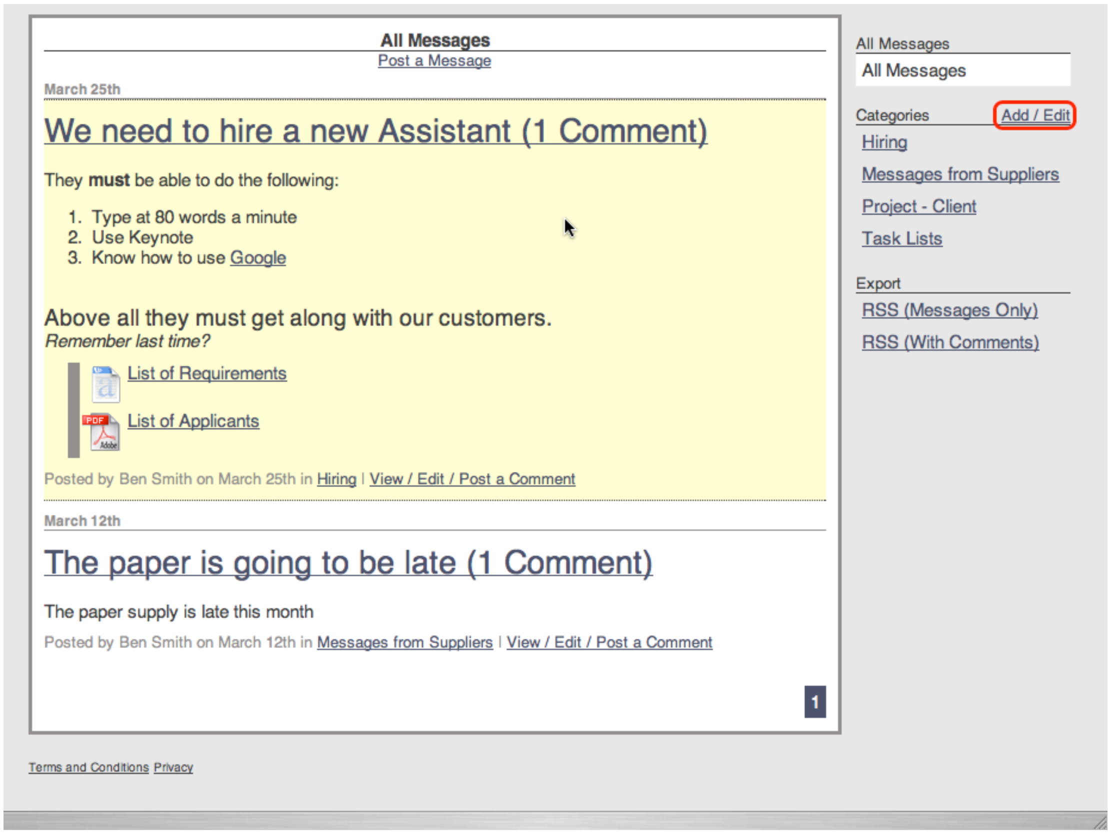
For reasons beyond the comprehension of the author, Internet Explorer 7 throws up a warning whenever a text box is opened. Just right click on the "information bar" at the top of your window and allow the script to run. You'll have to re-click on the button that sparked the warning, but it will work this time.

If you want the darn thing to go away permanently, there is a way to do that: Go to the "Tools" menu, click "Internet Options," then click on the "Security" tab, then the "Trusted Sites" icon, click on "Sites." Alright, type in your Heap account's url (that's the url you type in the address bar to get to Heap). Click add. If Internet Explorer throws up yet another dialog box, just uncheck the bottom check-mark and click add again.

I'm going to name my new category "Hiring" and click "OK."

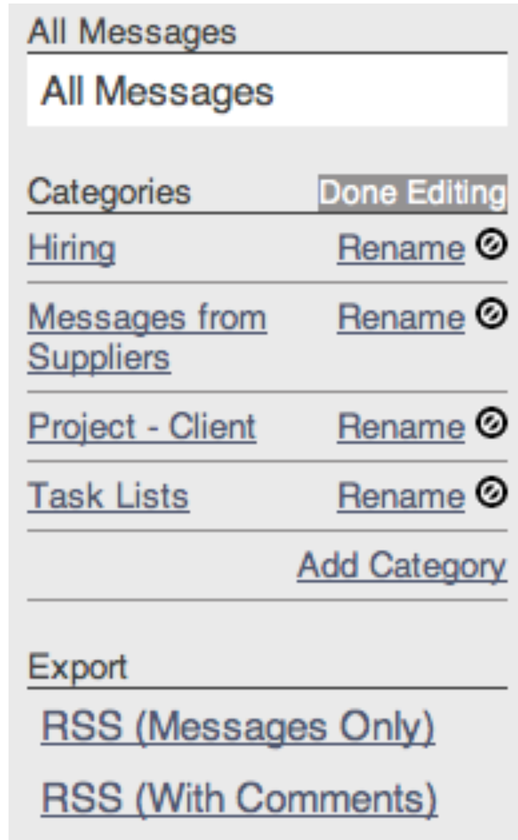


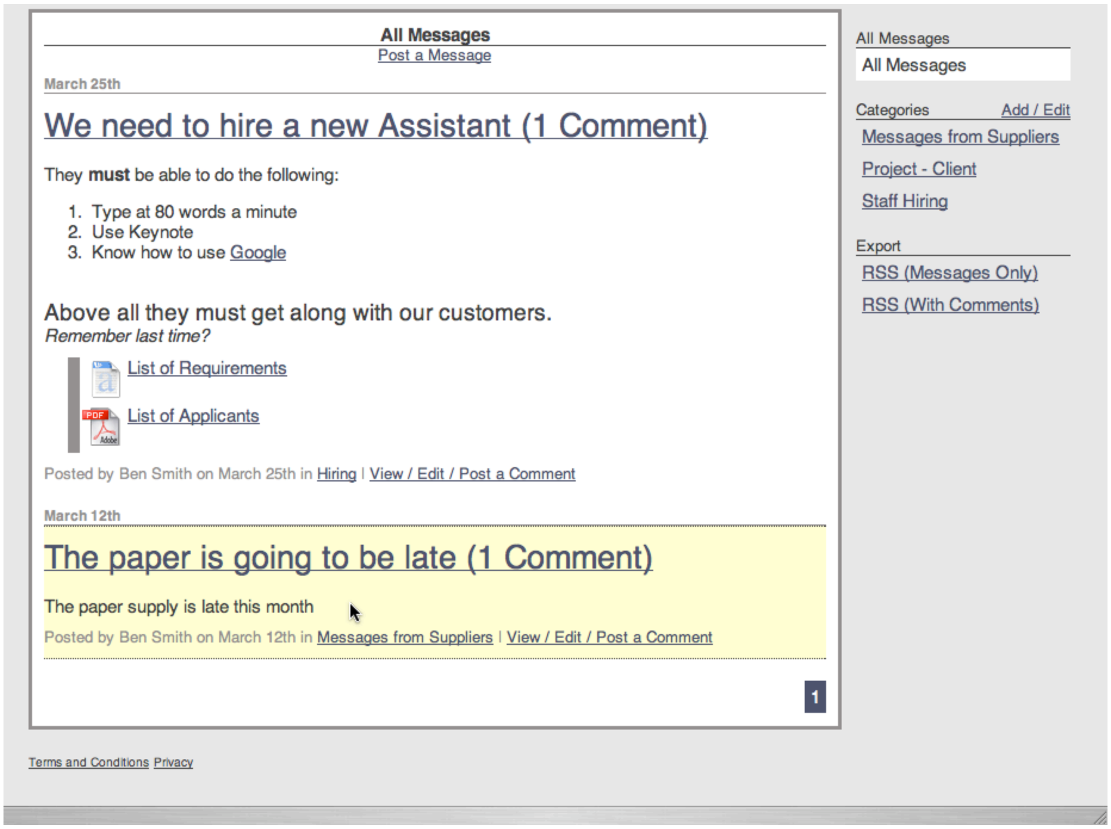
So, I created a category called "Hiring," and it automatically placed this in that category. Let's edit some other categories. Click on the "Messages" tab to get back to the main message page.



Click on the “Add / Edit” circled in red.

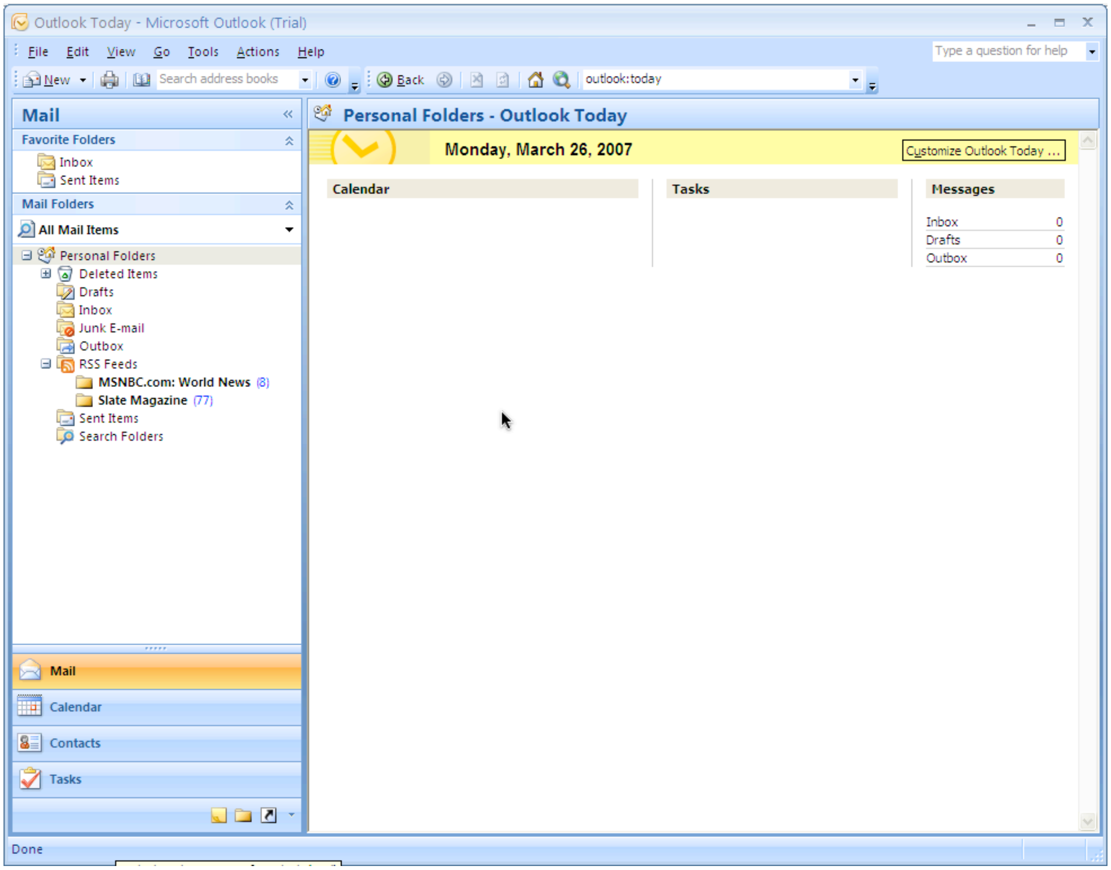
I’ve decided I don’t need the “Task Lists” category so I’ll just click on the delete button (⊘). And “Hiring” isn’t really what I want so let’s rename that “Staff Hiring.” Ok, I’m done so I’ll click on “Done Editing.”





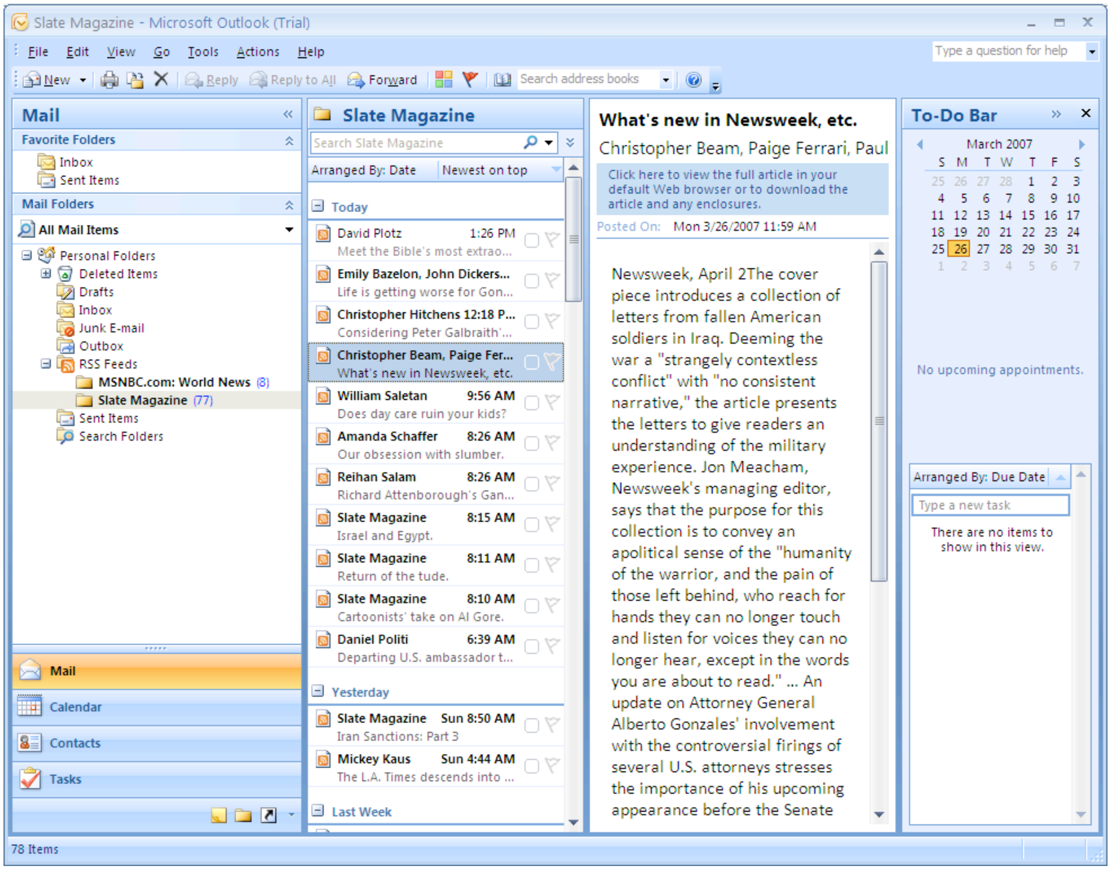
RSS

RSS is a wonderful technology that allows you to be up-to-date without having to login to Heap. Lets checkout Outlook 2007 with RSS.



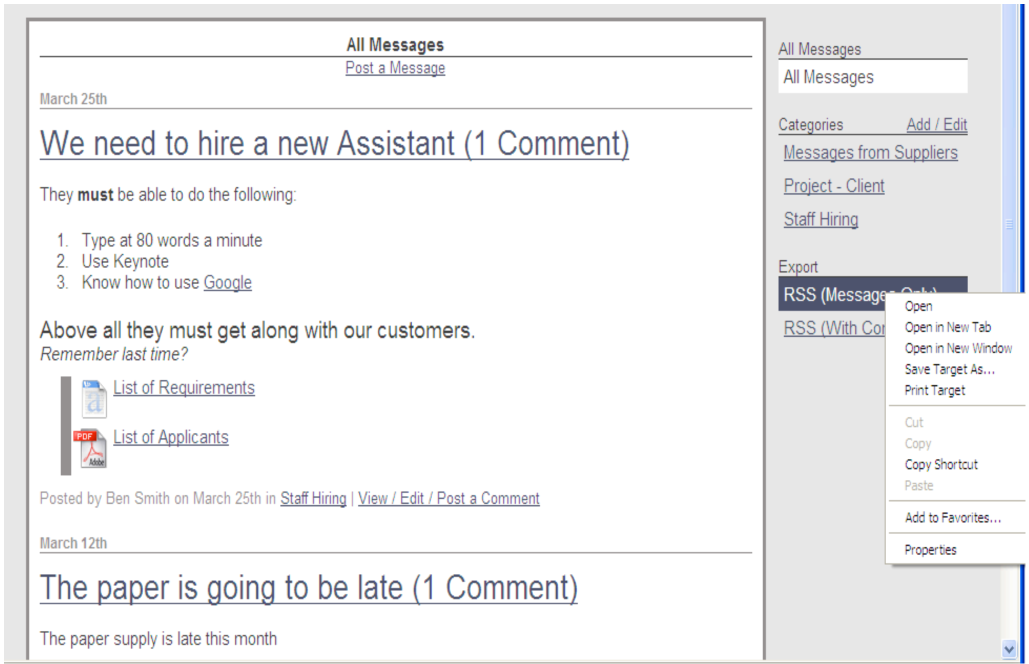
Ok, so under the mail folders is a section called "RSS Feeds," each feed is a folder containing each "message" in that feed (the blue number is the number of messages that are unread).

Let's look at the the "Slate Magazine" feed.



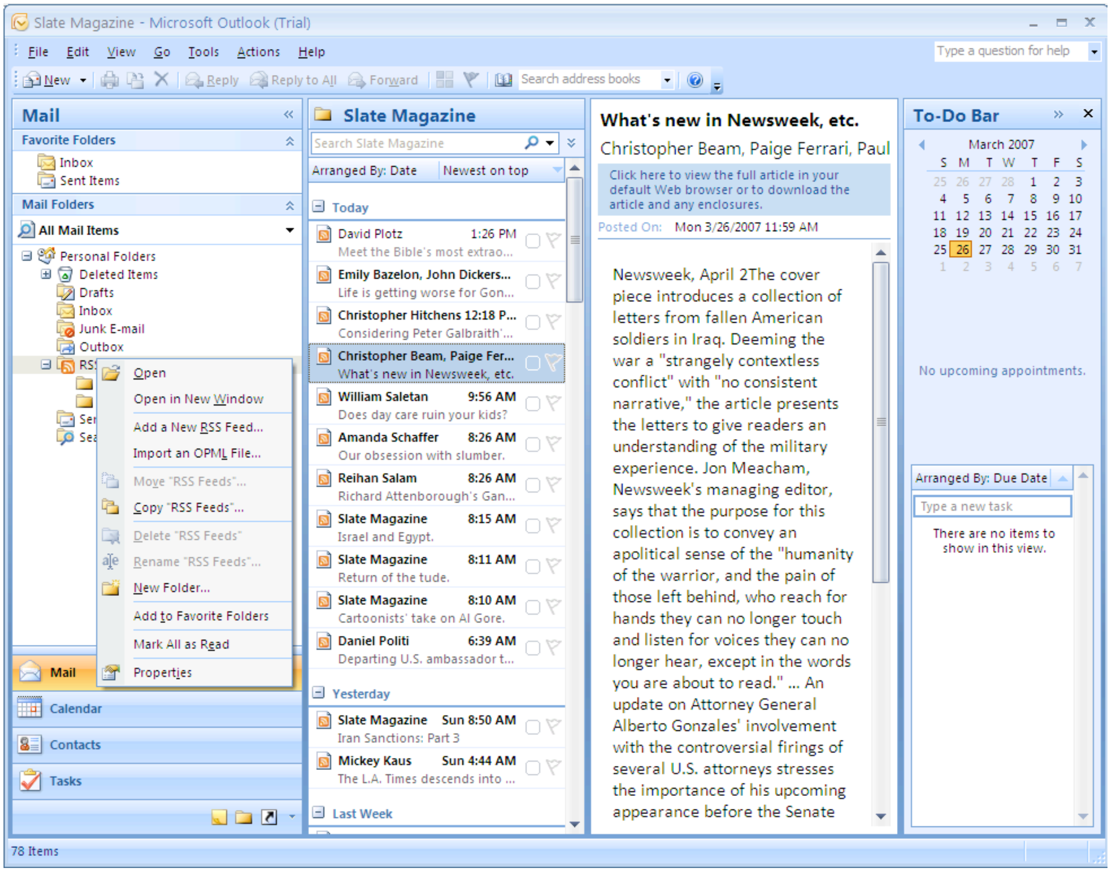
So, Outlook treats RSS as a form of email. There is a certain logic to this in a mail application. I'm going to add our feed to the list.

Step one is to open Heap and go to the messages section.

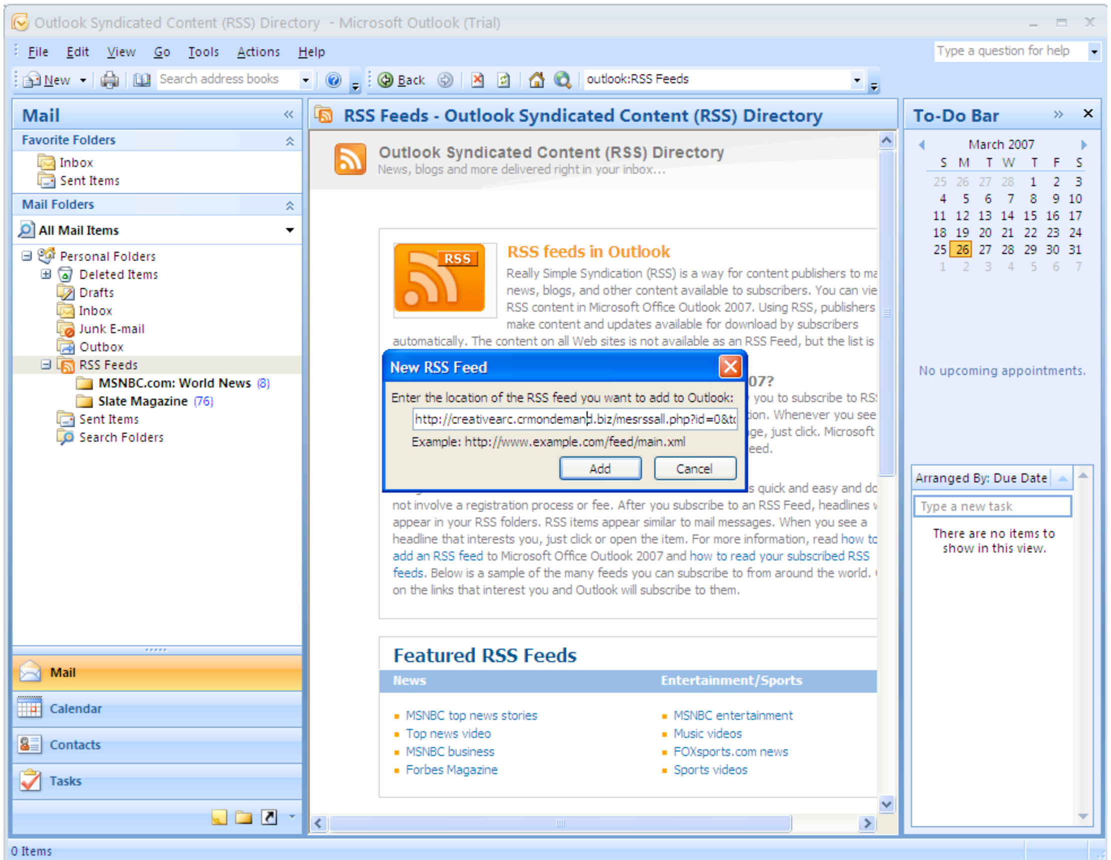


Now, I just right clicked on "RSS (Messages Only)," this will get me a feed with all messages because I'm in the "All Messages" section. I'm going to click on "Copy Shortcut" from the contextual menu (the menu that flys out when you right click on an item).

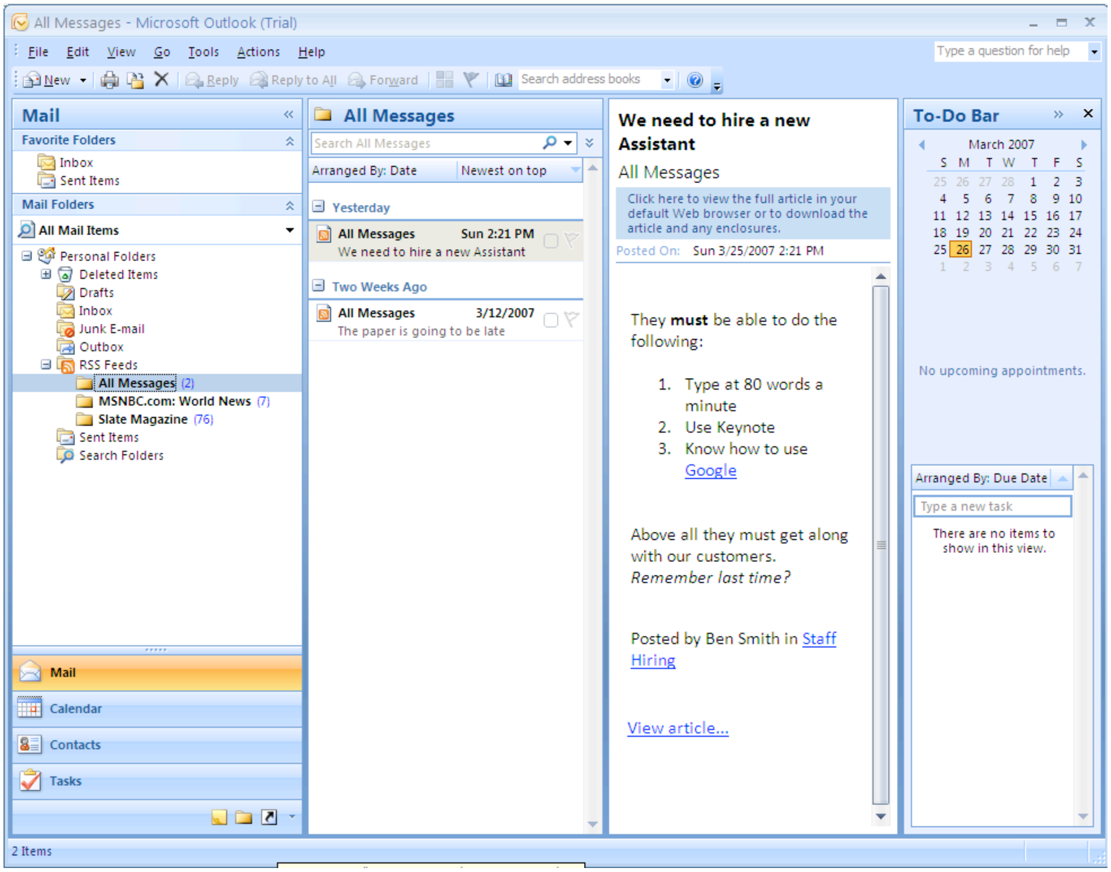
Back in Outlook, I'm going to right click on "RSS Feeds" and from the contextual menu I'll select "Add a New RSS Feed."



Ok, so now let's paste that shortcut we copied in Internet Explorer into Outlook.

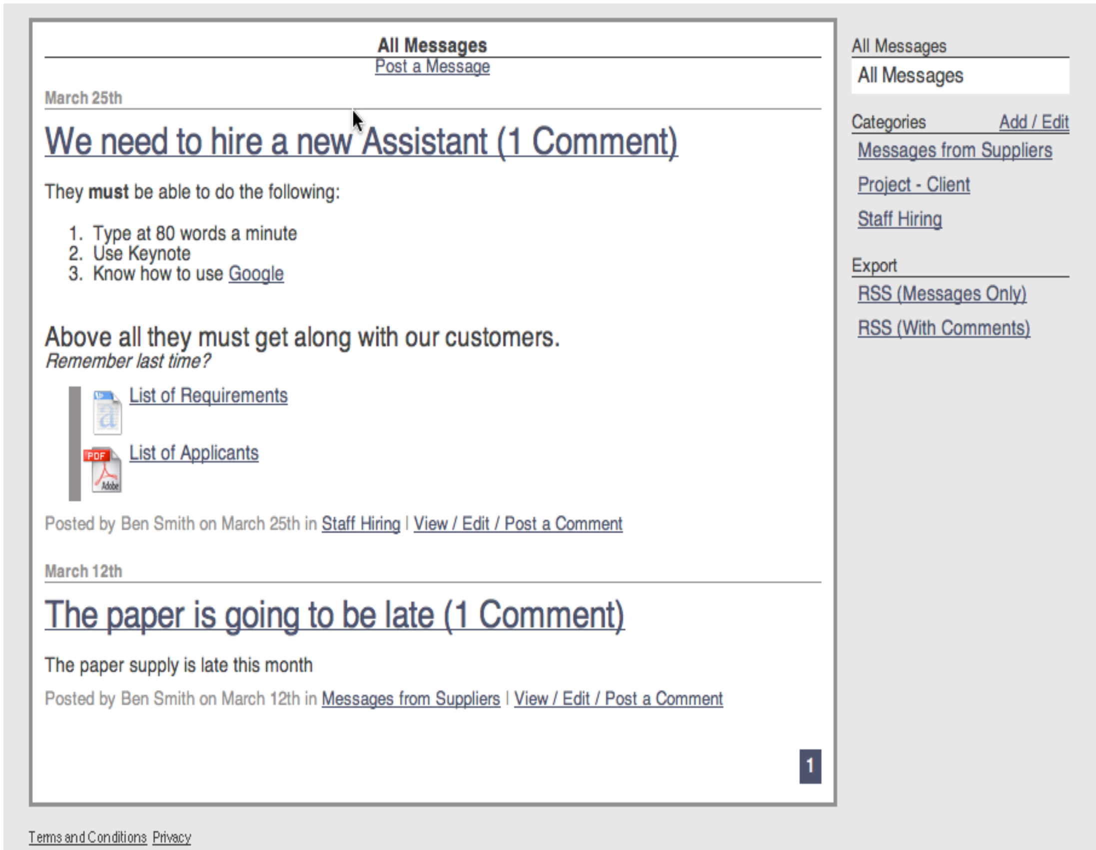


Now click "Add."

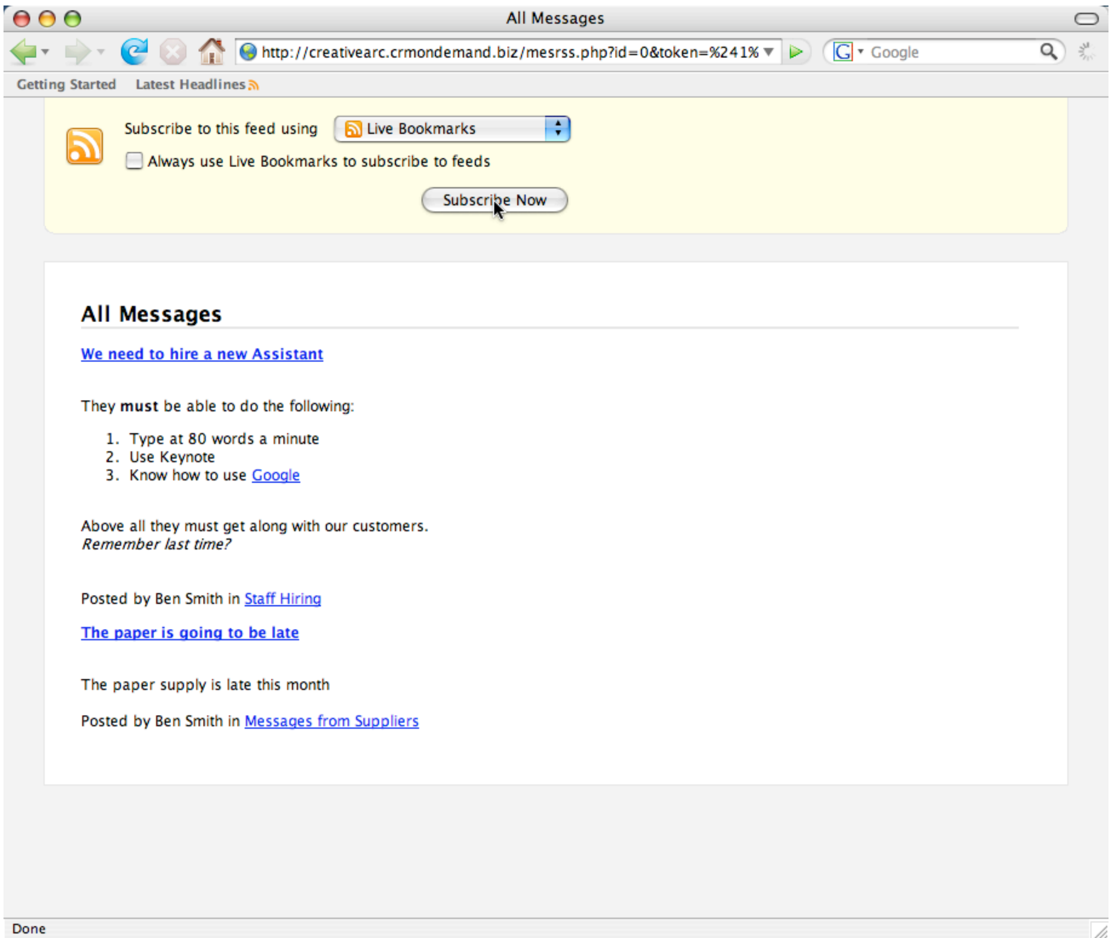


Looks good! Now anytime a message is posted I'll know because it will show up here.

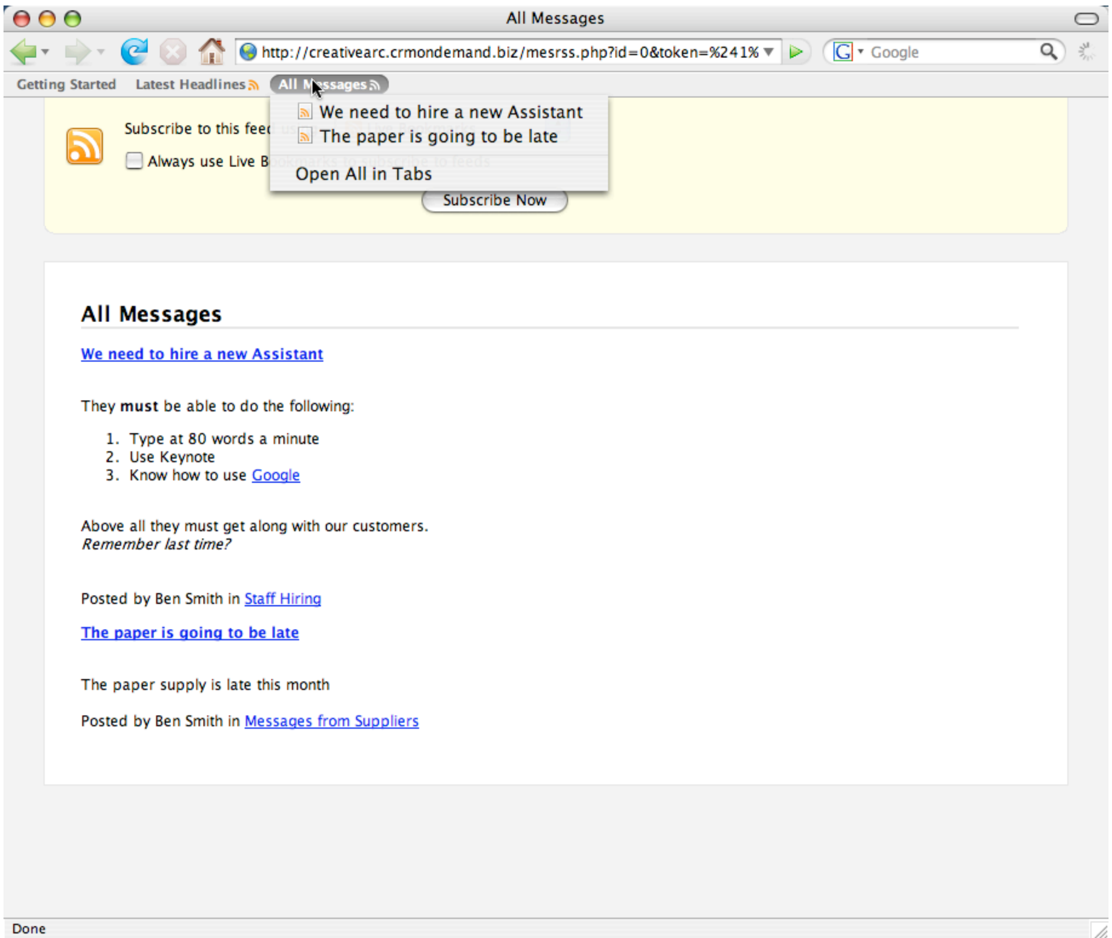
Ok, let's say you don't have Outlook, but you are using Firefox as your browser. Let's go to the message section.



Now click on "RSS (Messages Only)."



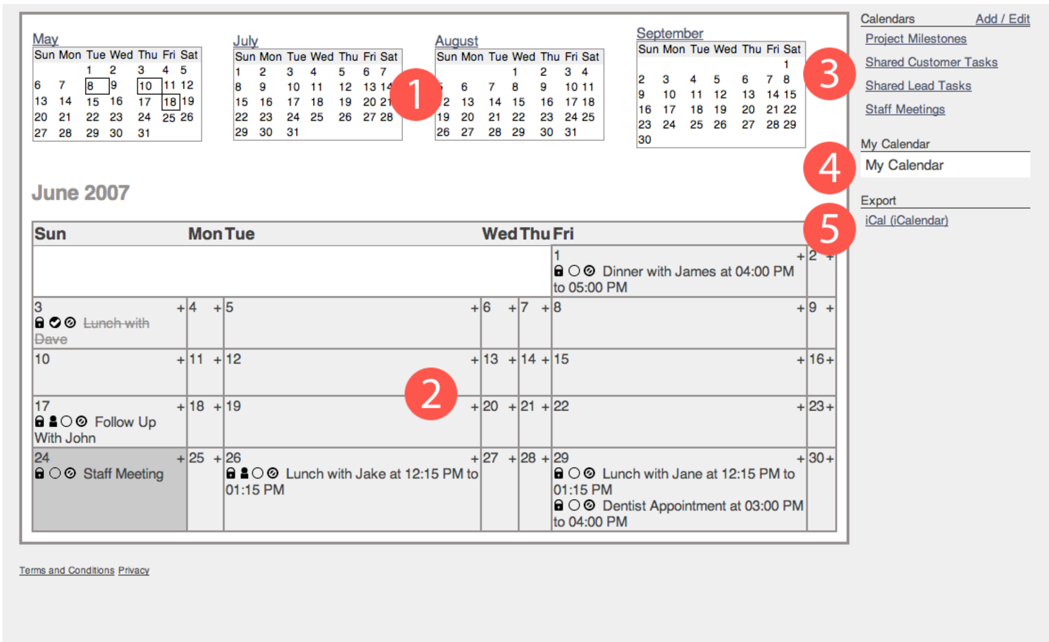
At this point you could actually use the "Subscribe to feed using:" drop-down and select another feed reader. But in this case we are going to use "Live Bookmarks." So just click "Subscribe Now."



Now, there is a "bookmark" called "All Messages" containing our two messages. Just like in Outlook, this bookmark will update with new messages.

Most RSS readers are variations on these two themes. Either treating RSS feeds as a special type of email or as bookmarks. Internet Explorer 7, Safari and Opera all understand RSS feeds as bookmarks. Thunderbird, Apple Mail (in Leopard) and Yahoo! Mail all interpret RSS as a type of mail message.

Calendars



1 is a group of four small calendars (the three months following the current month and one month back). If an event is on one of the days in a month, it shows a black box around the day (look at May 16th).

2 is the large calendar. In this area you can add, edit and delete events and task. To switch months, simply click on a month name in one of the small calendars.

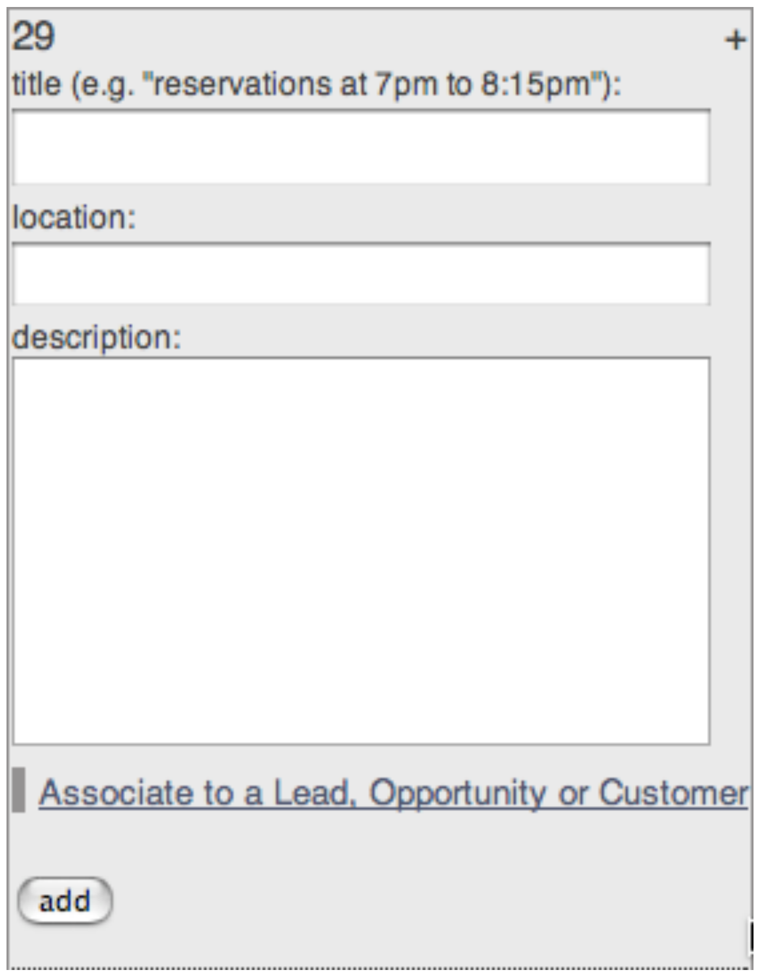
3 is a list of the available calendars. From here you can switch calendars, or add, edit or delete them.

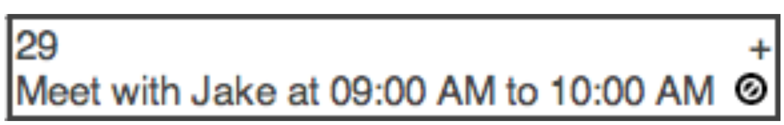
4 is “My Calendar” which is a very special calendar, and the calendar we are currently viewing.

5 is the iCalendar export; with which you can import your calendars into iCal enabled programs like Apple iCal and Outlook 2007.

Let's dive in. I want to add an event on the 29th, so I'm going to click on the "+" in that day.

Ok, so the following slid down. I'm going to put "Meet with Jake at 9am" in the title field. I'm leaving all of the other fields blank. Press "add."





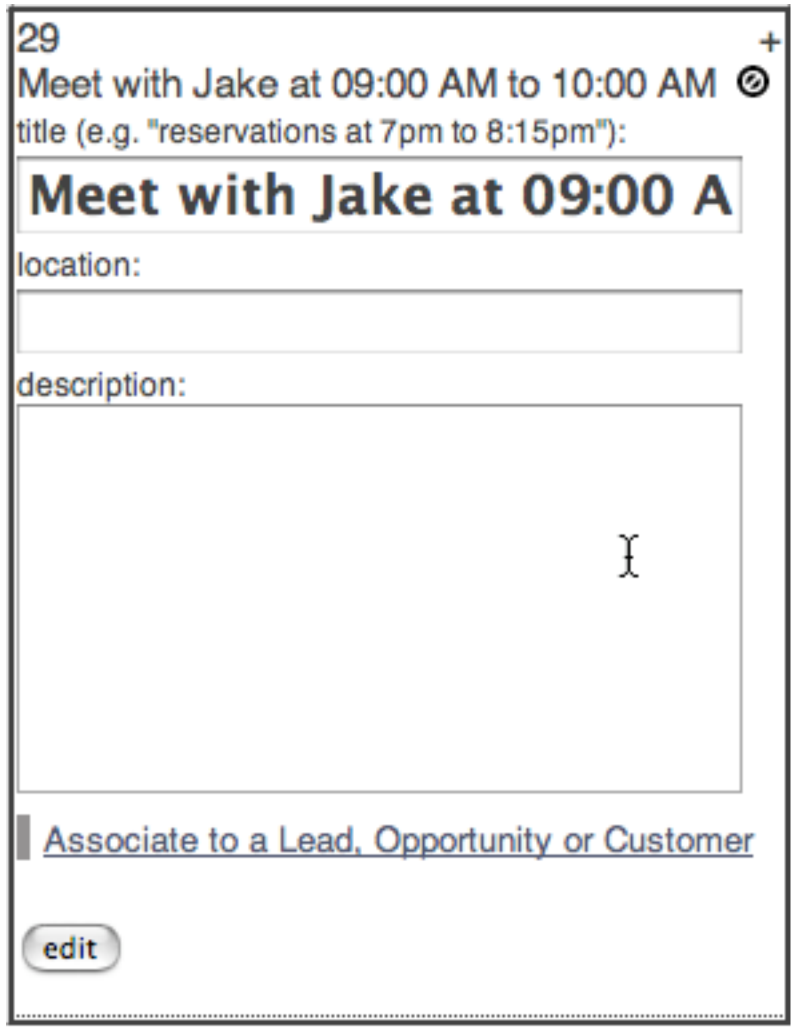
Notice, Heap assumed that the event was one hour long because I didn't specify an end time.

NOTE: How Times Work

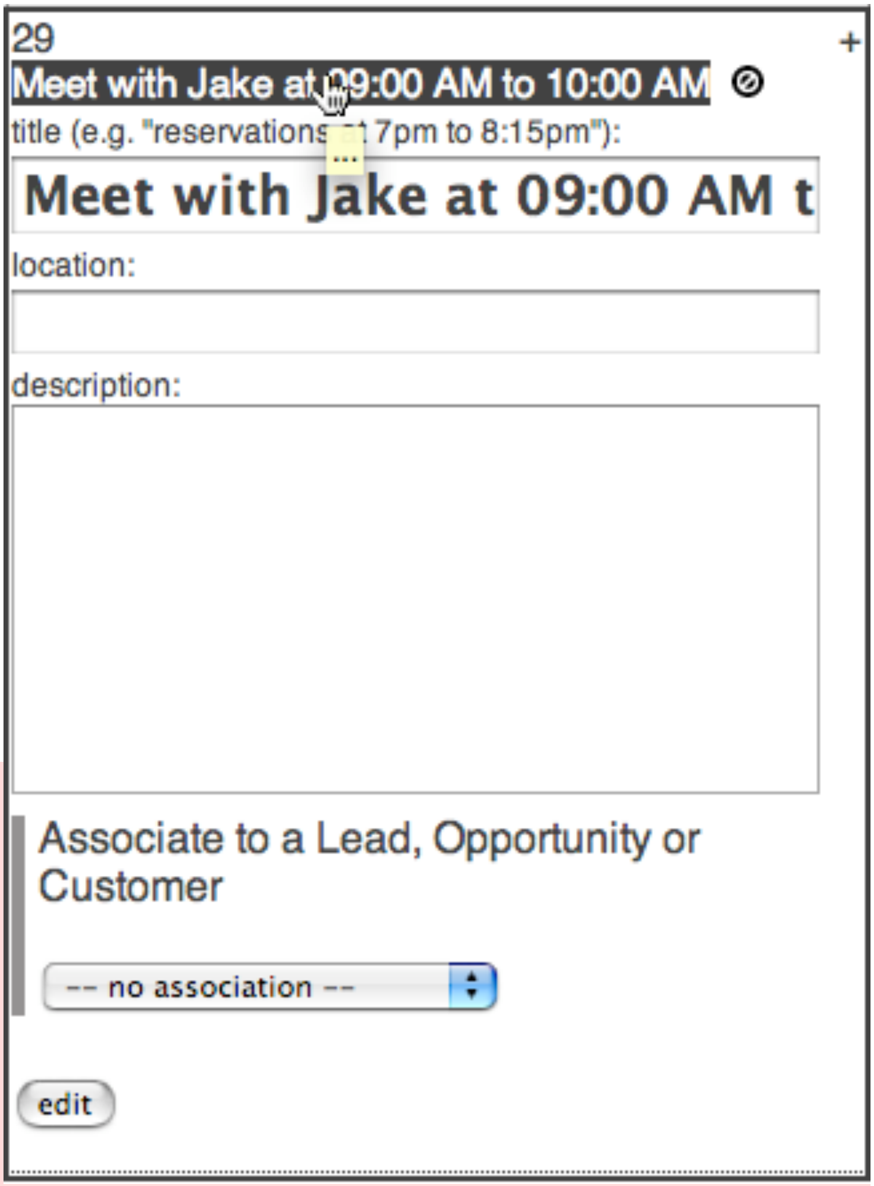
Times can be accepted in a variety of formats, but the key is the word "at." For instance, if I put "Meet with Jake **at** 9am" in the title, Heap will understand, but if I put "Meet with Jake 9am" instead, Heap will think that entire phrase is the title of a task and there is no time. You can also put start and end times in the title using the operator "to." Let's say the meeting with Jake is suppose to go two and half hours; I could put "Meet with Jake at 9am **to** 11:30am."

So what if I want to edit the event? Well, just click on the title, in this case "Meet with Jake at 09:00 AM to 10:00 AM."

This box slides down. In this case, I want to associate this event to a lead, opportunity or customer. So I will click on "Associate to Lead, Opportunity or Customer."



We now have a drop-down including every lead, opportunity and customer. Let's select Jake Simms from the drop-down.

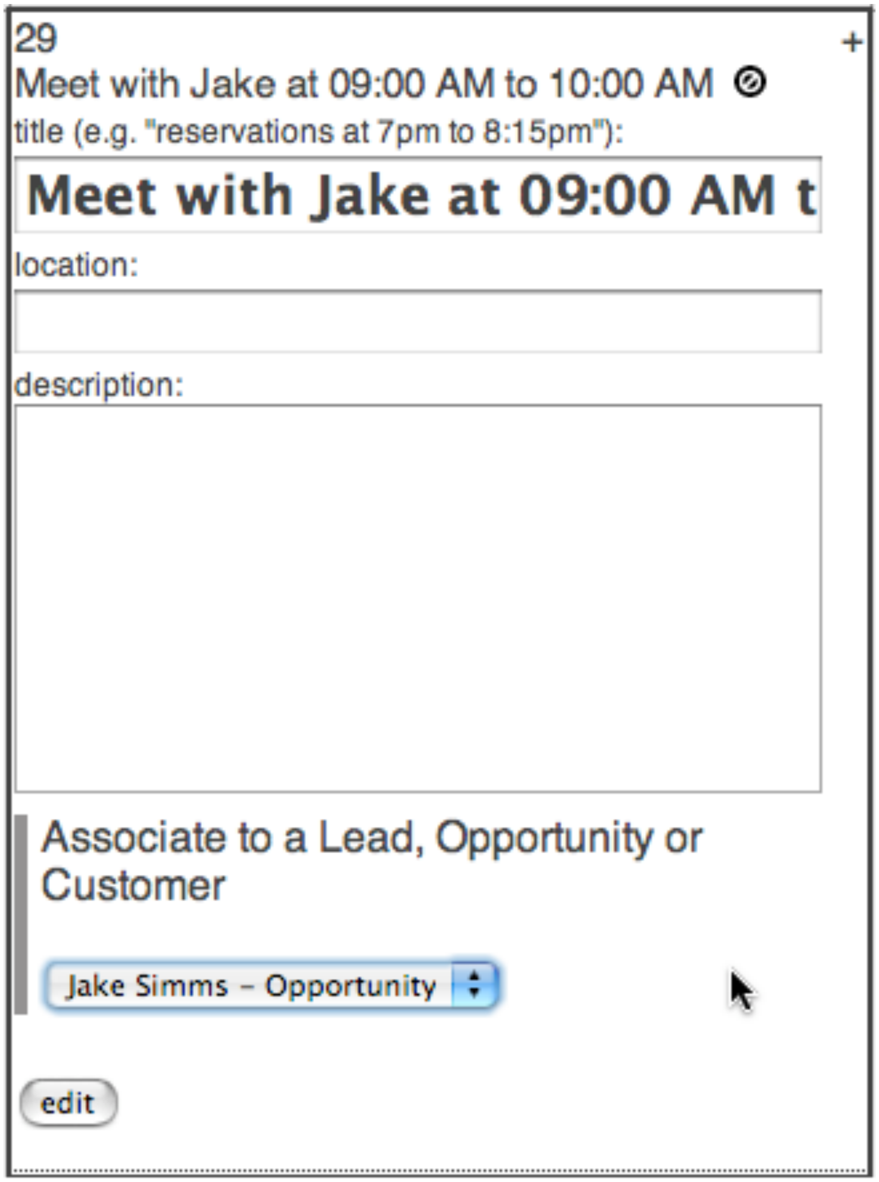


NOTE: Drop-Downs

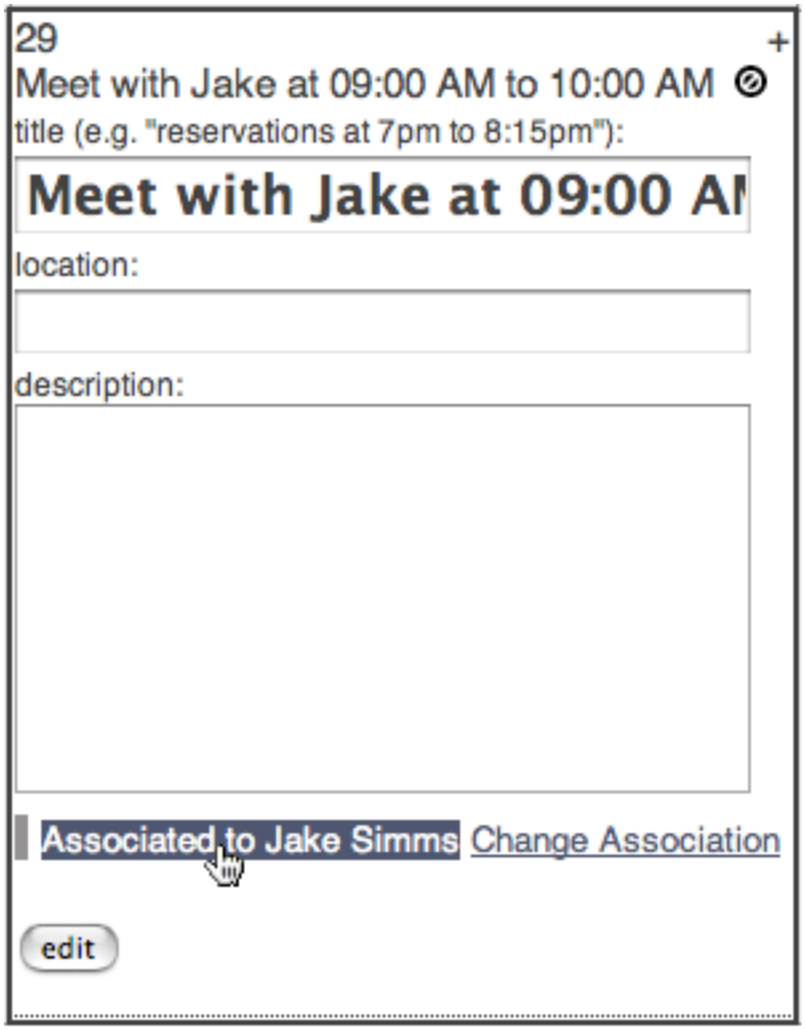
Most browsers let you use your keyboard to select items more quickly in long drop-down lists. So if you want to select an item that starts with the letter "j" you could hit "j" on your keyboard and the drop-down would scroll to the first item that starts with a "j".

Ok, so we now have Jake Simms selected.

Let's click edit and see what happens.



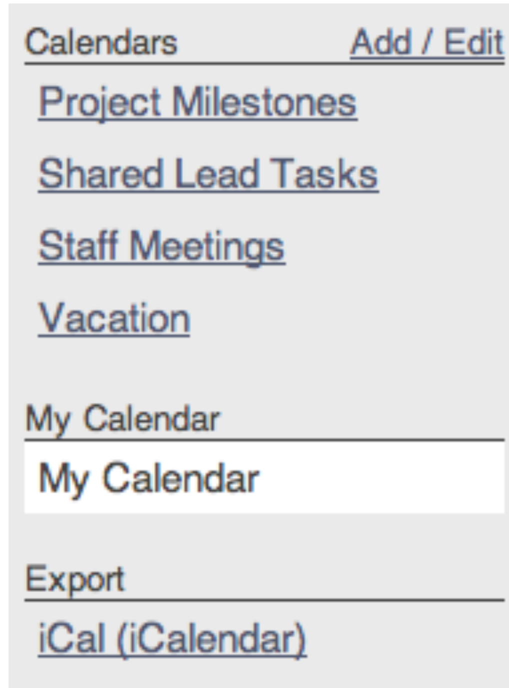
Now, when I click the title I see the following:



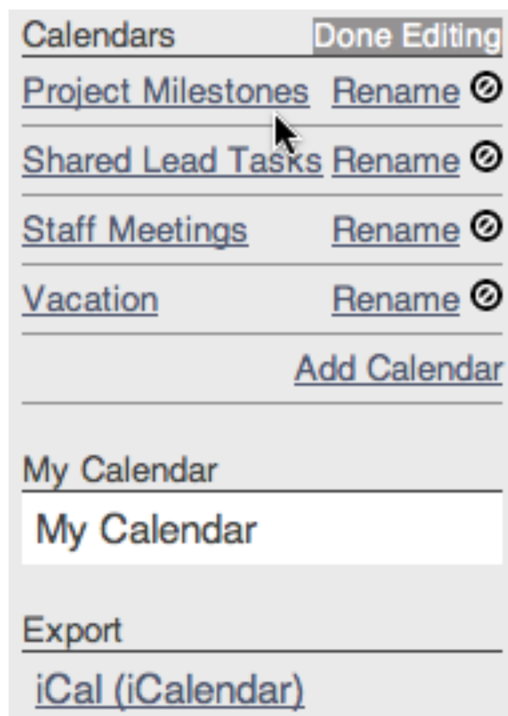
If I click on "Associated to Jake Simms" it will take me to the Jake Simms opportunity. I can also change the association (or remove the association) by clicking on the "Change Association" link.

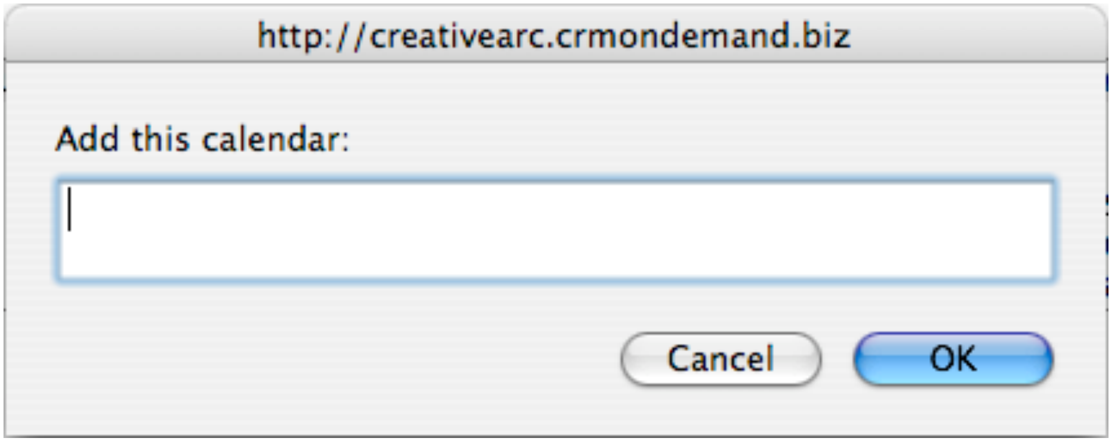
So far, we have only worked on "My Calendar." The events on this calendar are not necessarily public, and we need other people in our company to see some of our events. Let's look at the other calendars.

At the moment we have four calendars. I also want to add "Shared Customer Tasks" and delete "Vacation." Let's hit the Add / Edit button.



Ok, so a click on "Add Calendar" should do the trick.





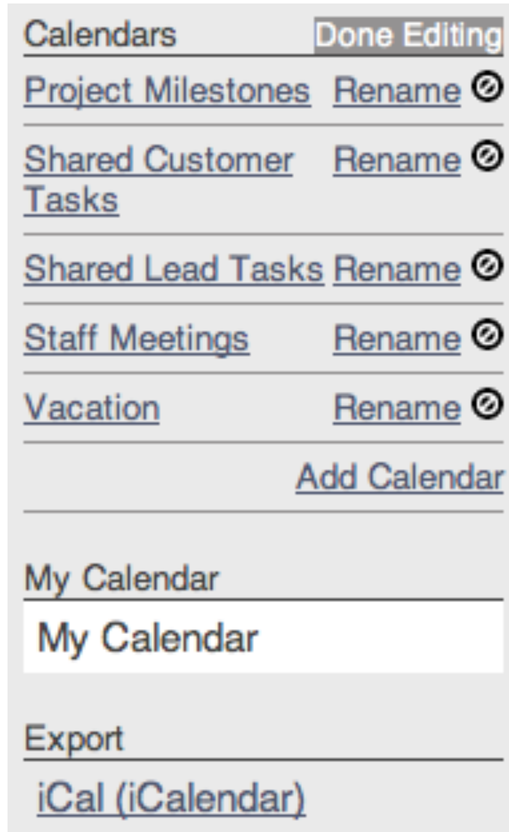
NOTE: Internet Explorer 7 Users

For reasons beyond the comprehension of the author, Internet Explorer 7 throws up a warning whenever a text box is opened. Just right click on the "information bar" at the top of your window and allow the script to run. You'll have to re-click on the button that sparked the warning, but it will work this time.

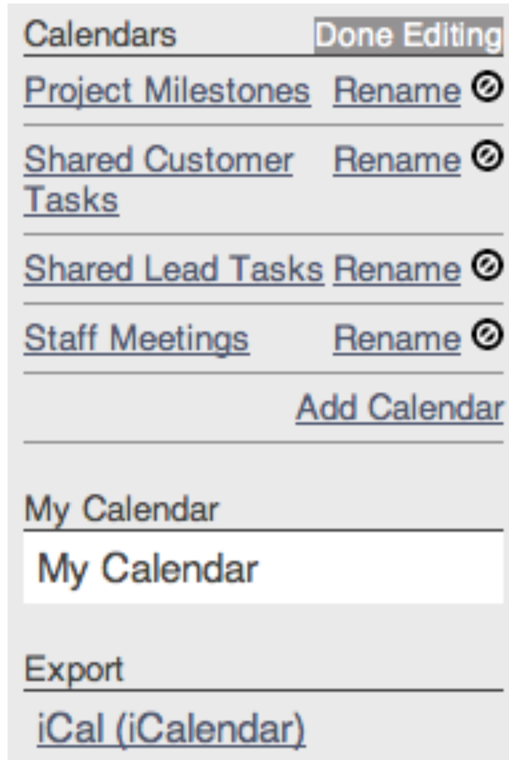
If you want the darn thing to go away permanently, there is a way to do that: Go to the "Tools" menu, click "Internet Options," then click on the "Security" tab, then the "Trusted Sites" icon, click on "Sites." Alright, type in your Heap account's url (that's the url you type in the address bar to get to Heap). Click add. If Internet Explorer throws up yet another dialog box, just uncheck the bottom check-mark and click add again.

So I've typed "Shared Customer Tasks" and clicked on "OK."

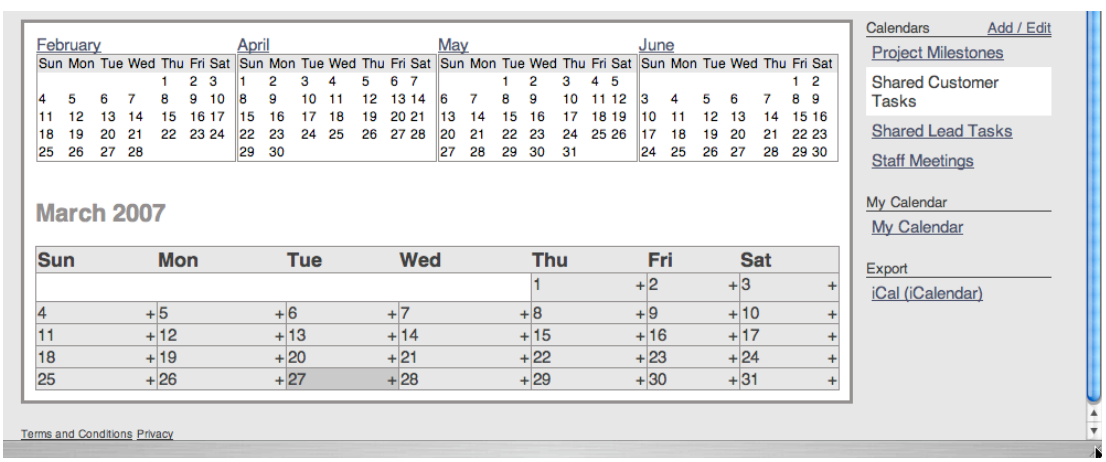
But that isn't the only thing I wanted to do. I also need to delete "Vacation." Well, all I have to do is click on the delete button (⊘).



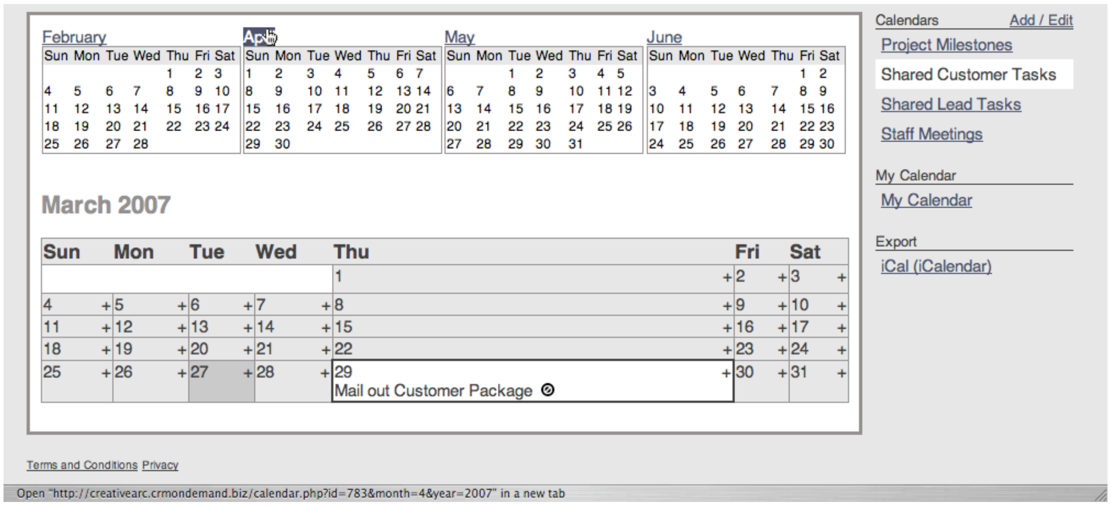
I think I'm done, so I will just click on "Done Editing."



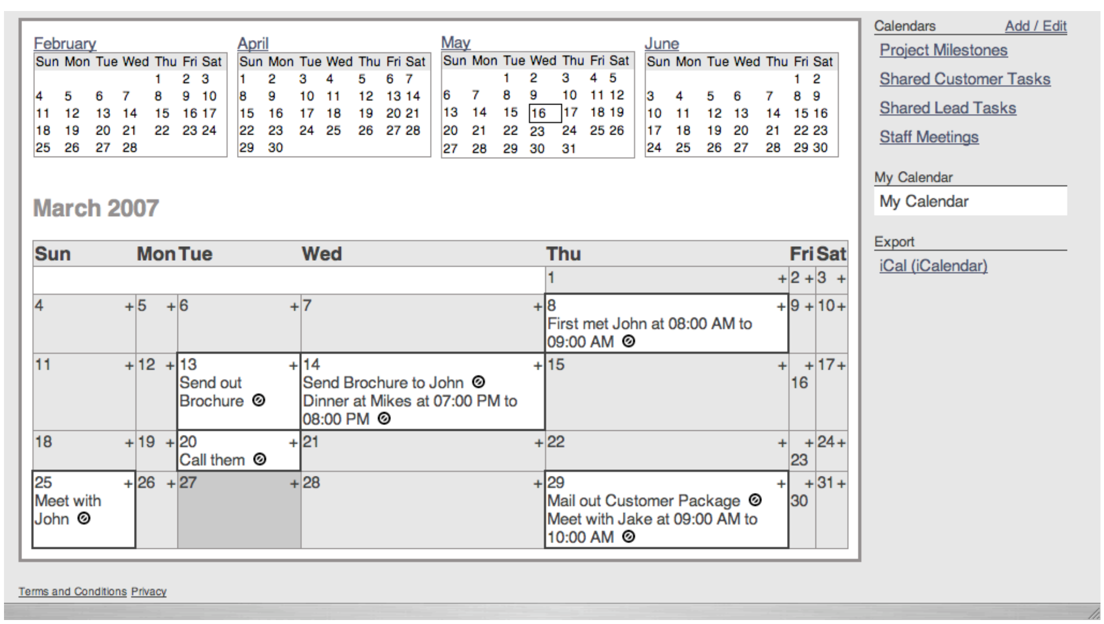
I'm going to click on new calendar ("Shared Customer Tasks").



So I need to create an event. The title will be "Mail out Customer Package." After adding the event the calendar looks like this.



But, wait a second, the event also showed up on "My Calendar!"



How can this be? I added the event to "Shared Customer Tasks."

NOTE: The Special Nature of "My Calendar"

"My Calendar" contains every event you create regardless of where you create it. In some cases you might decide to create an event on "My Calendar" directly; in which case that is the only place you will see it (the event will not be seen by other users). However, if you create an event on one of the other calendars, it will show up on *your* "My Calendar" as well. Other users will be able to see the event on the calendar where you created it, but not on "My Calendar."

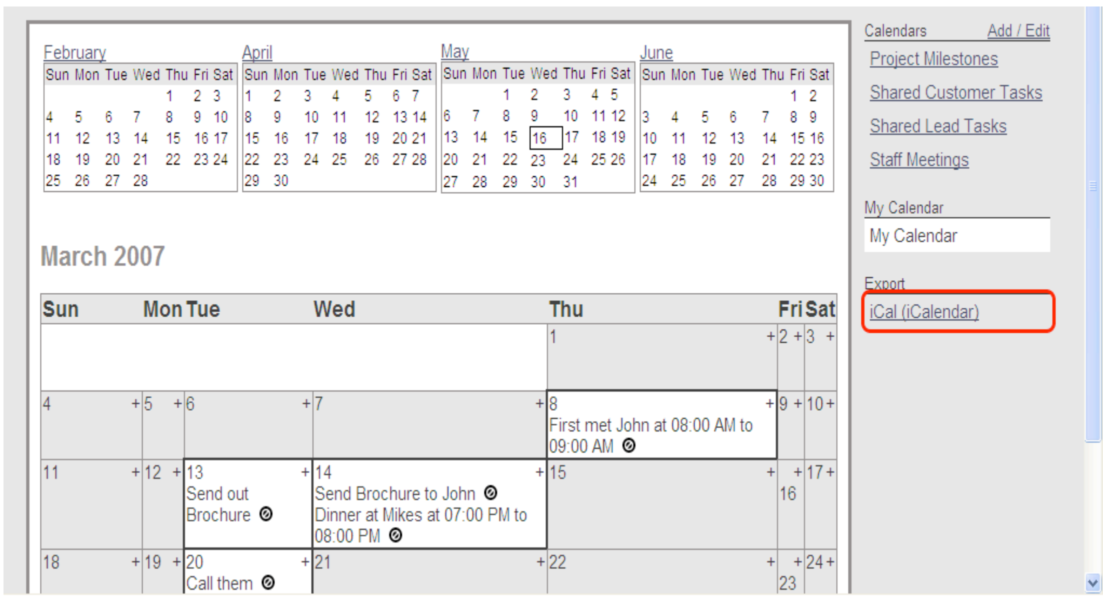
So what does this mean? Well, "My Calendar" is a quick and easy way to see everything you are doing. If you want to see only a particular type of task (or what other users are up to) you might want to look at one of the other calendars. But private events, like a dentist / doctors appointments, can be added to "My Calendar" directly and no other user will see them.

iCal (iCalendar)

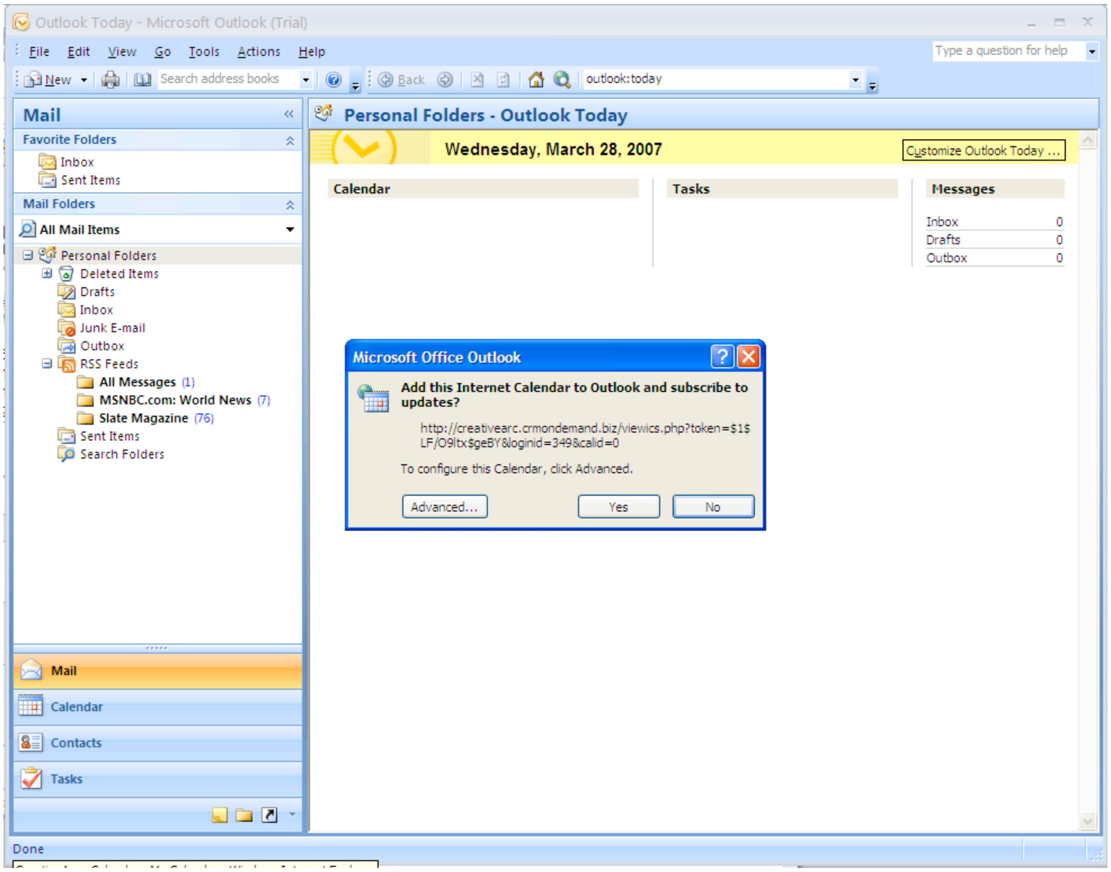
If you need to see your calendar events in your desktop application (like Apple iCal, Thunderbird or Outlook 2007) then you need iCal. Thankfully, your in luck, Heap publishes every event as an iCal.

Ok, so there are lot formats that export calendar data, why is iCal so special? Well, just like RSS feeds, iCal is a live feed. So when I change an event in Heap it automatically updates in whatever desktop application I might be using.

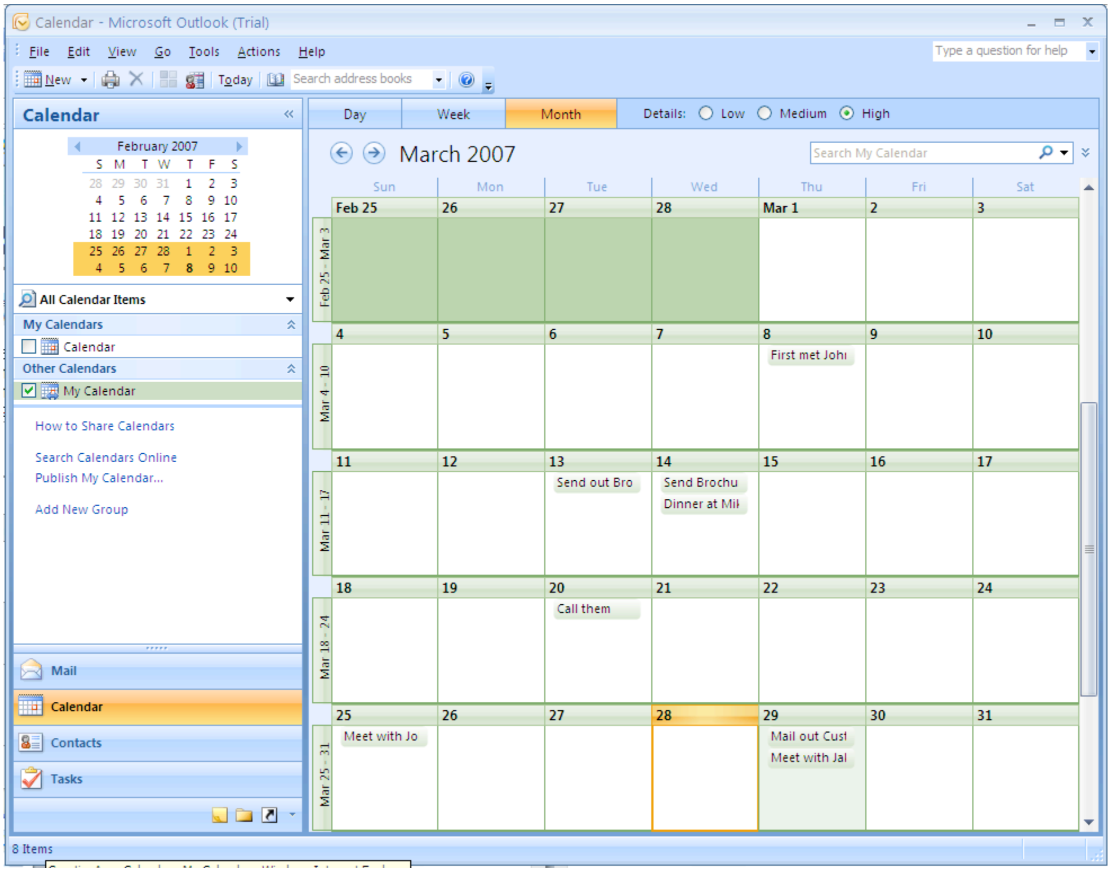
Let’s give this a try. First, Outlook 2007.



We’re looking at “My Calendar,” let’s just click on “iCal (iCalendar).” Remember, because we are looking at “My Calendar” this will be a feed of “My Calendar.”

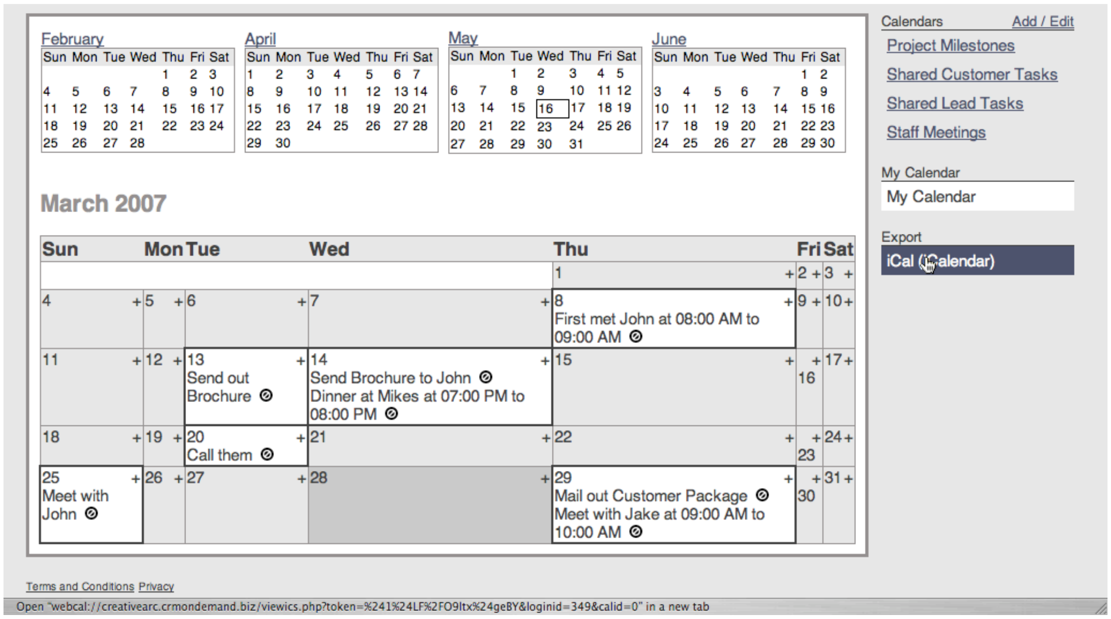


Alright, now just click "Yes."

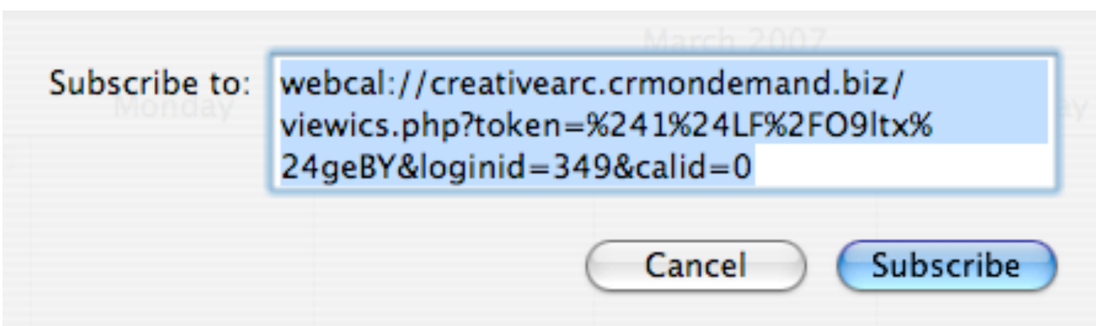


Ok, that's it. Now whenever you create an event it will automatically appear here as well.

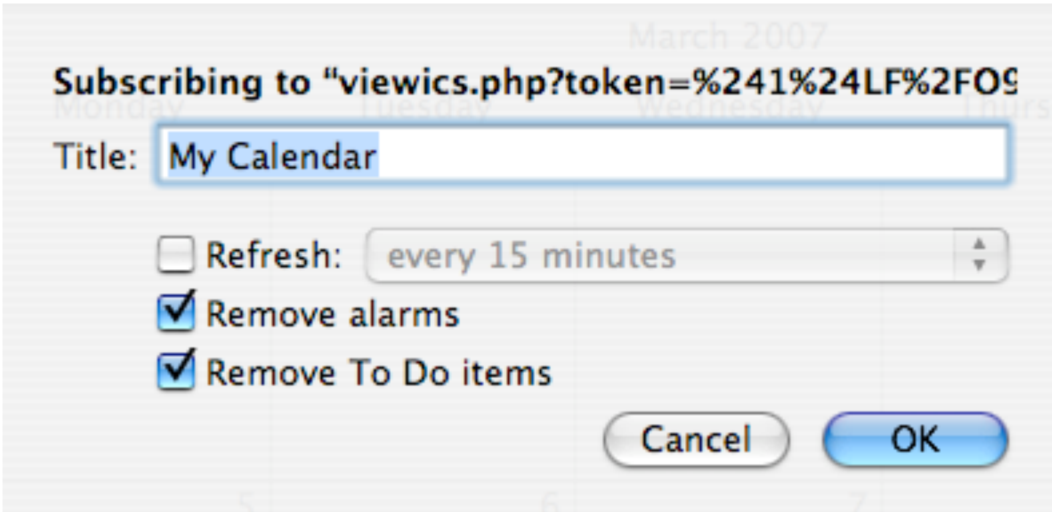
Let's give it a go with Apple iCal.



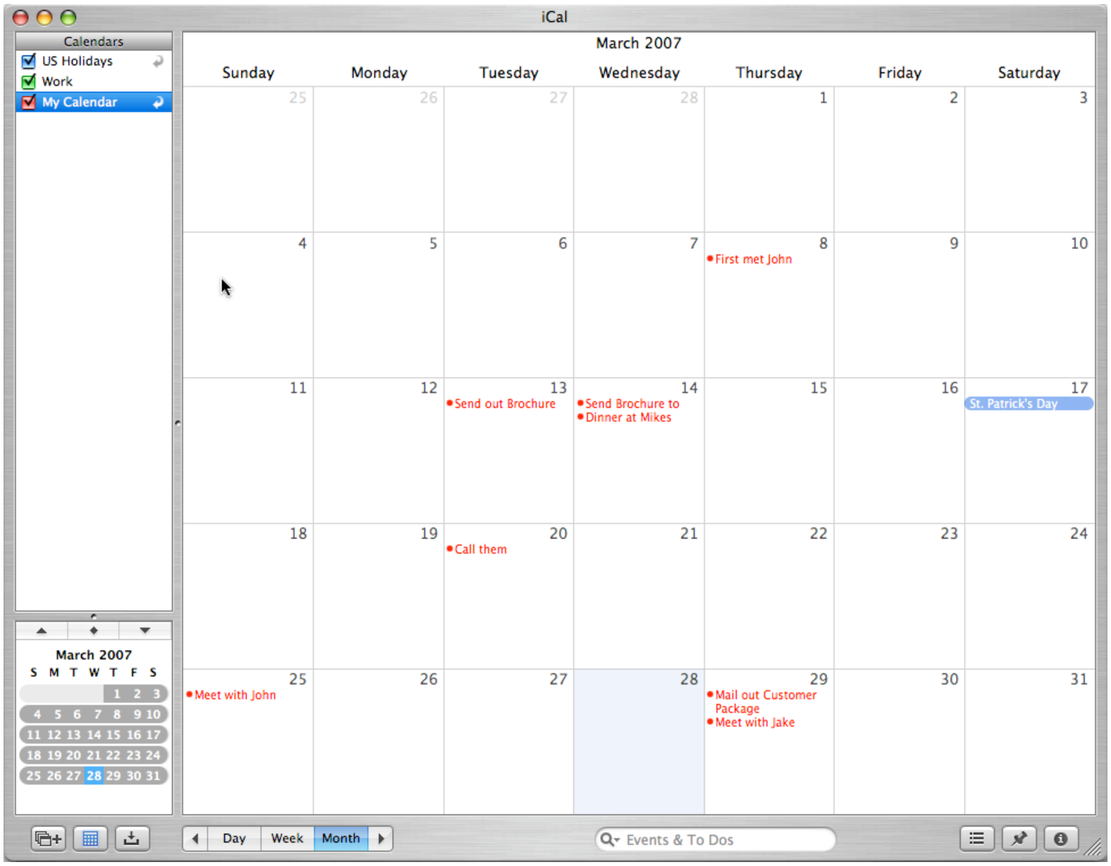
Again, just click on the "iCal (iCalendar)."



Ok, just click "Subscribe."

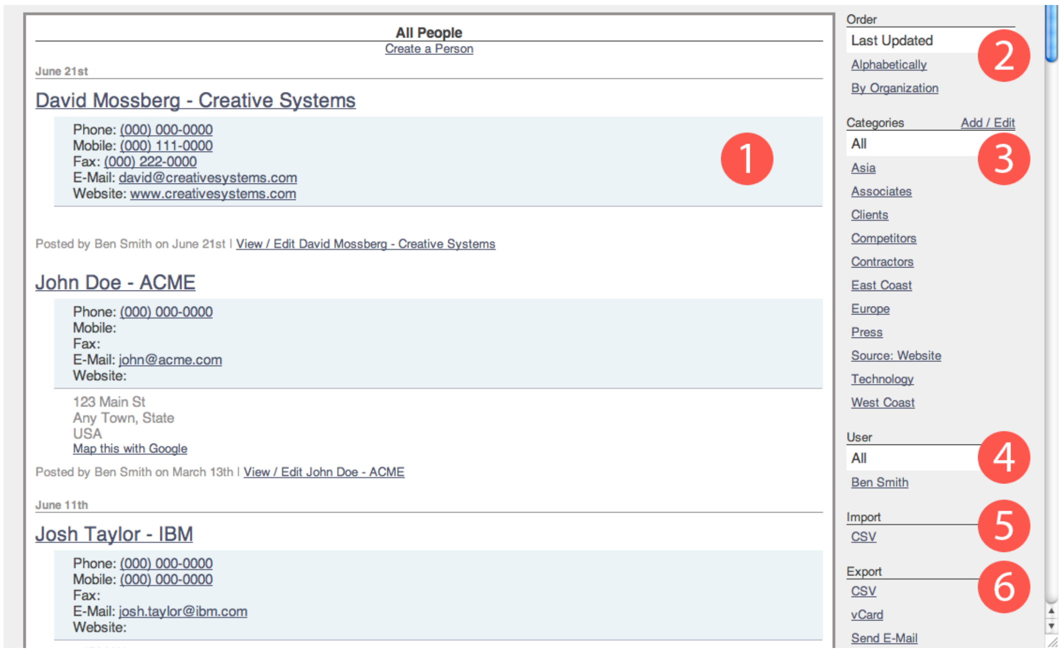


Ok, there is one change on this screen, I don't want to update this manually, so I will set the refresh to 15 minutes.



And that's it. Every time there is an update in Heap, it will update here as well.

People (Contacts)



1 is the list of people. From here you can see their phone numbers, email and address. If you click on their email address, your email client will open up. If you click on a phone number you will call the person with Skype.

2 is where you can control the order of the items in **1**.

3 is your list of categories. Remember, a single person can be in many categories, so you can really fine-tune your categories to fit you business. If you don't know how to create categories, please refer to the messages section of this manual.

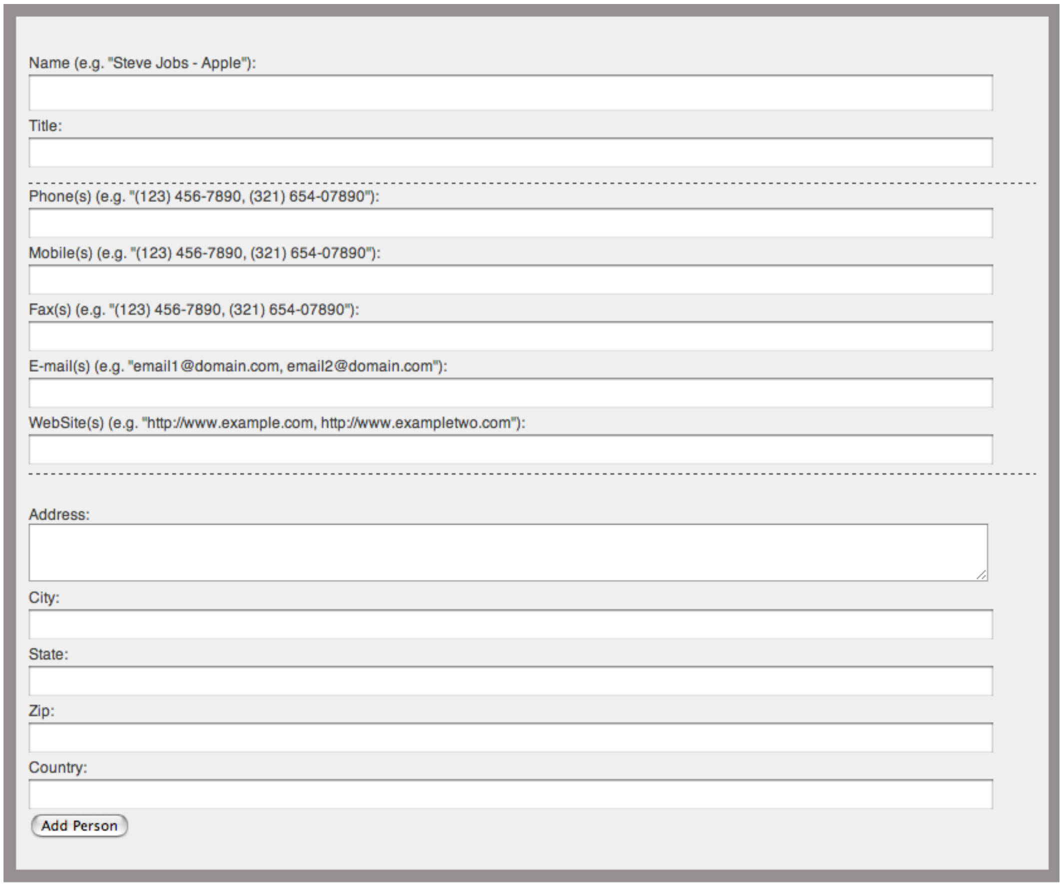
4 is you list of active users. This is a list of all the users that have created at least one person. This category works in tandem with the categories. In other-words, if you have the category "Asia" selected and the user "John

Doe," that will show only people who where created by "John Doe" *and* are in the "Asia" category.

5 allows you to import CSV (Comma Separated Values) files. With this tool you can quickly create a large number of people using your contacts in Outlook, Gmail, Thunderbird and many others.

6 allows you to export a CSV file, send email to a group, and export vCards. As you might guess, this allows you to quickly get data out of Heap into applications such as Outlook, Gmail, Thunderbird, etc.

Let's start by clicking on "Create a Person." The following scrolls down.


Name (e.g. "Steve Jobs - Apple"):

Title:

Phone(s) (e.g. "(123) 456-7890, (321) 654-07890"):

Mobile(s) (e.g. "(123) 456-7890, (321) 654-07890"):

Fax(s) (e.g. "(123) 456-7890, (321) 654-07890"):

E-mail(s) (e.g. "email1@domain.com, email2@domain.com"):

WebSite(s) (e.g. "http://www.example.com, http://www.exampletwo.com"):

Address:

City:

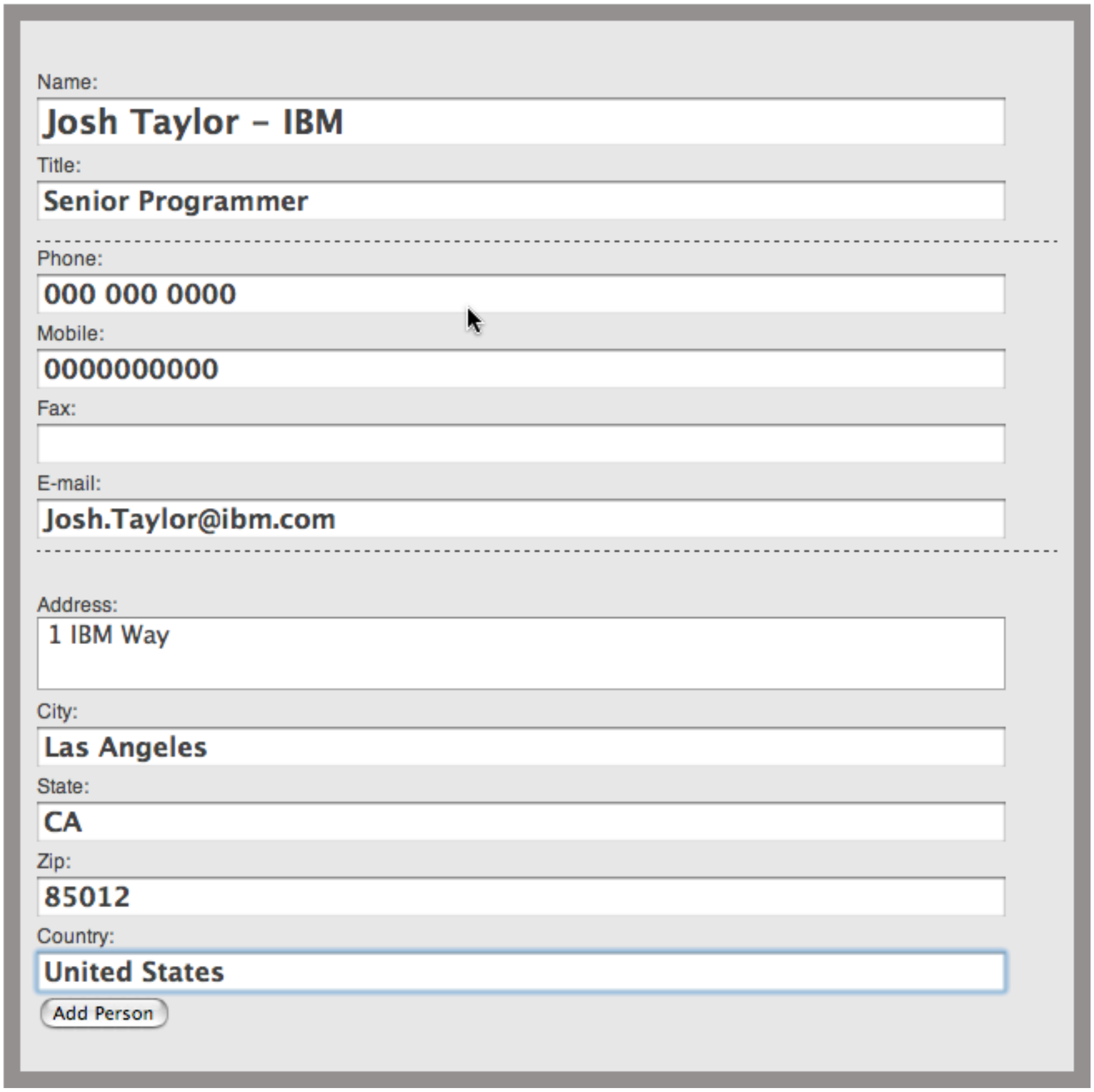
State:

Zip:

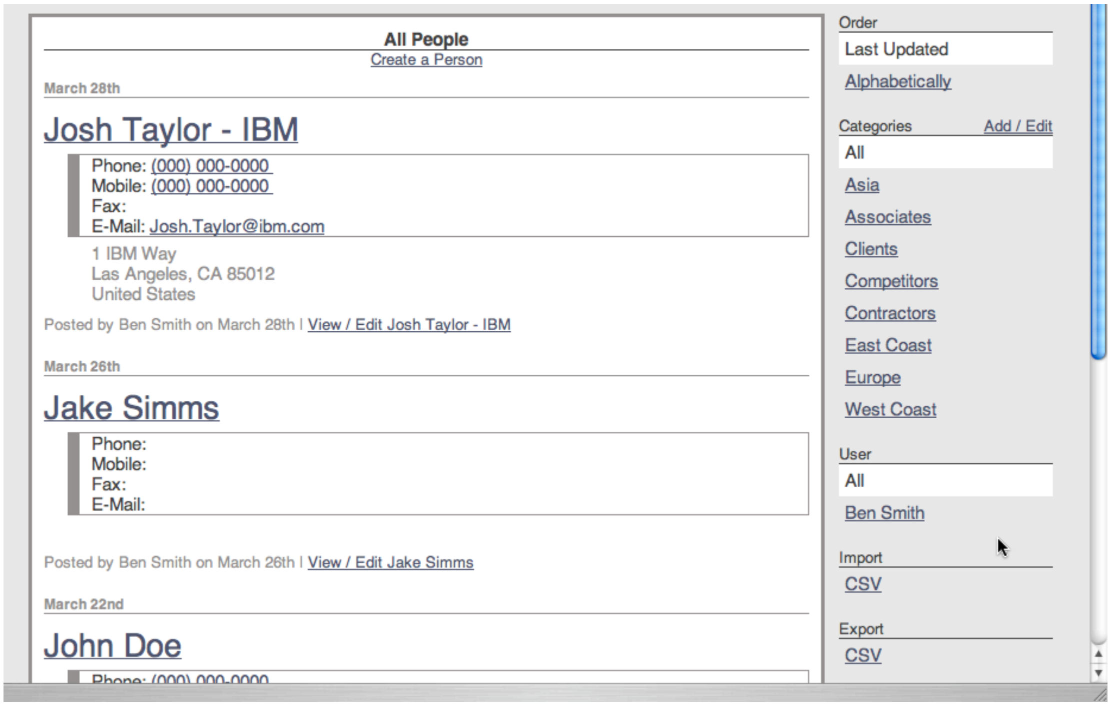
Country:

Add Person

So, I’m going to put in some data.



Let's see what happens:

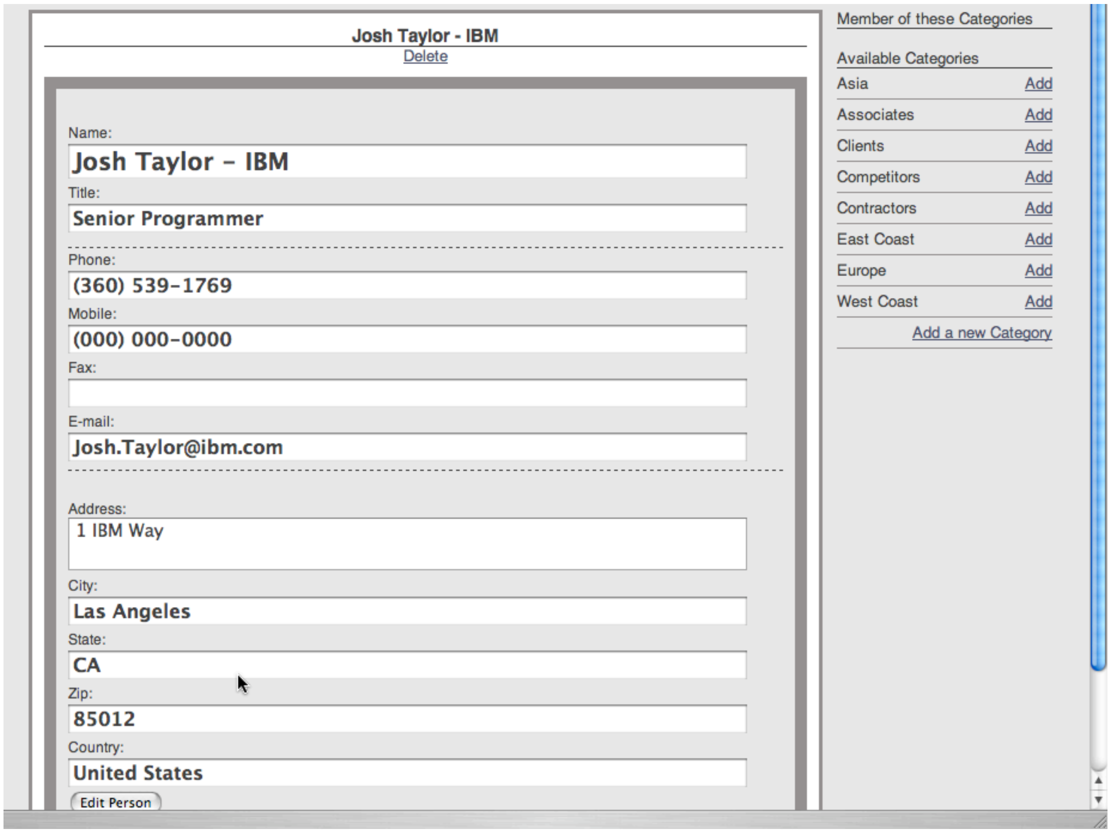


Notice what happened to the phone numbers? They both got reformatted and turned into links. Now, if you click on either one of them, Skype will open up and give them a call (Skype is available at http://www.skype.com/).

Why don't we give it a try, I'm clicking on the phone number:

And Skype pops up and makes the call.

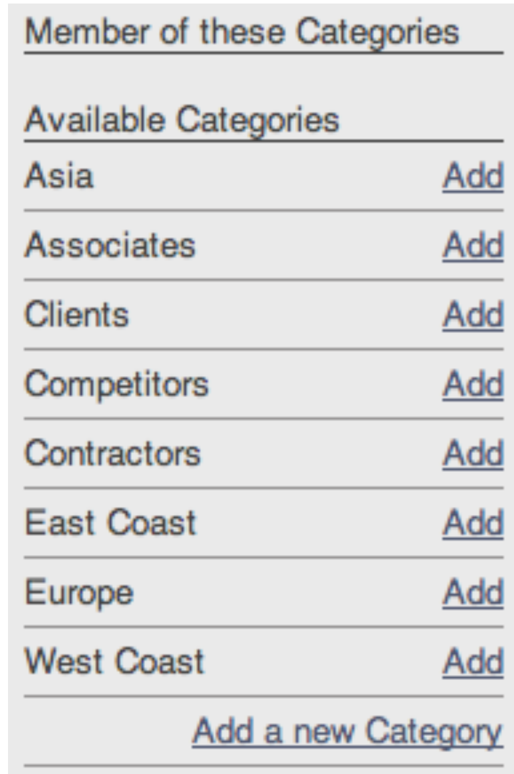
Ok, so let's edit "Josh Taylor." All you have to do is click on the person's name or the "View / Edit" button.



Ok, so first I am going to fix a misspelling in the city field and hit "Edit Person."

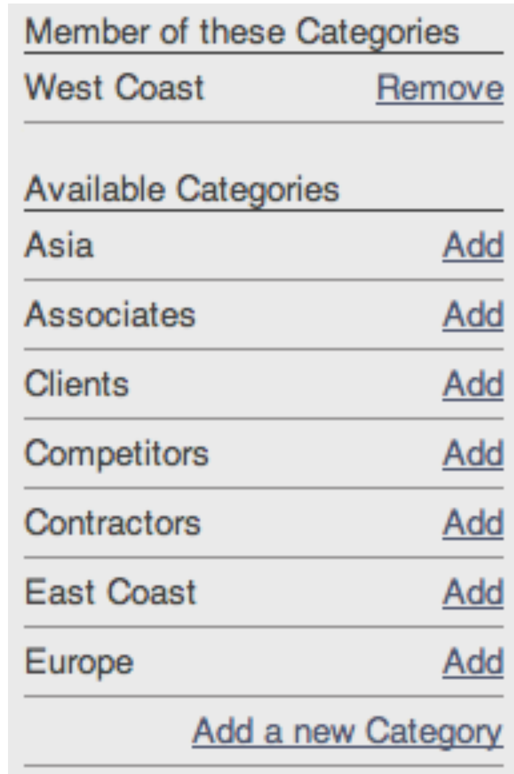
Let’s focus on categories. People can be in as many categories as you want. So you really should add the person to any category that may apply.

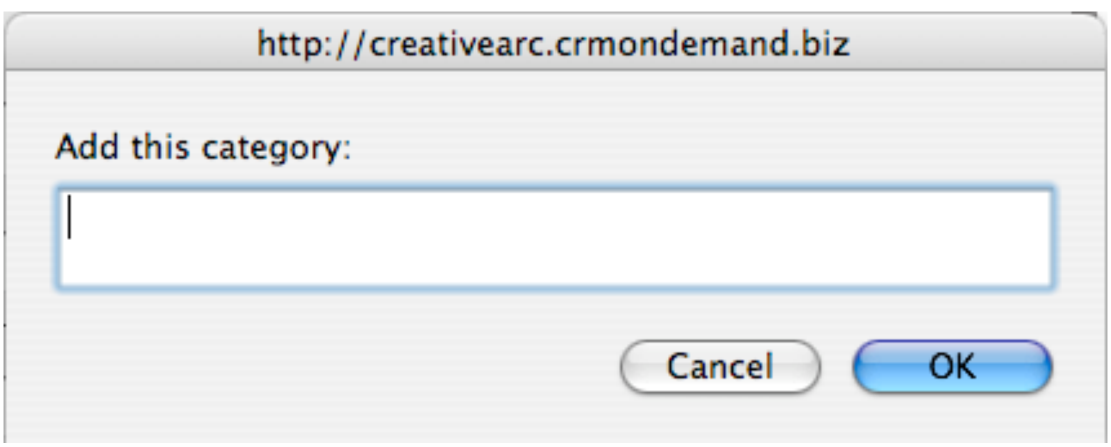
I’m going to add this person to the “West Coast” category by clicking on the “Add” button next to the category name.



Alright, but I really should add this guy to some sort of technology category.

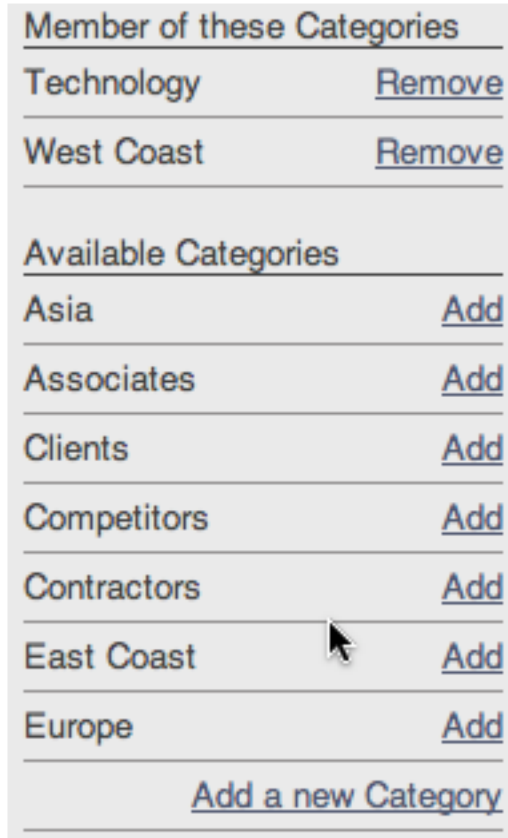
Well, let's just click on "Add a new Category."



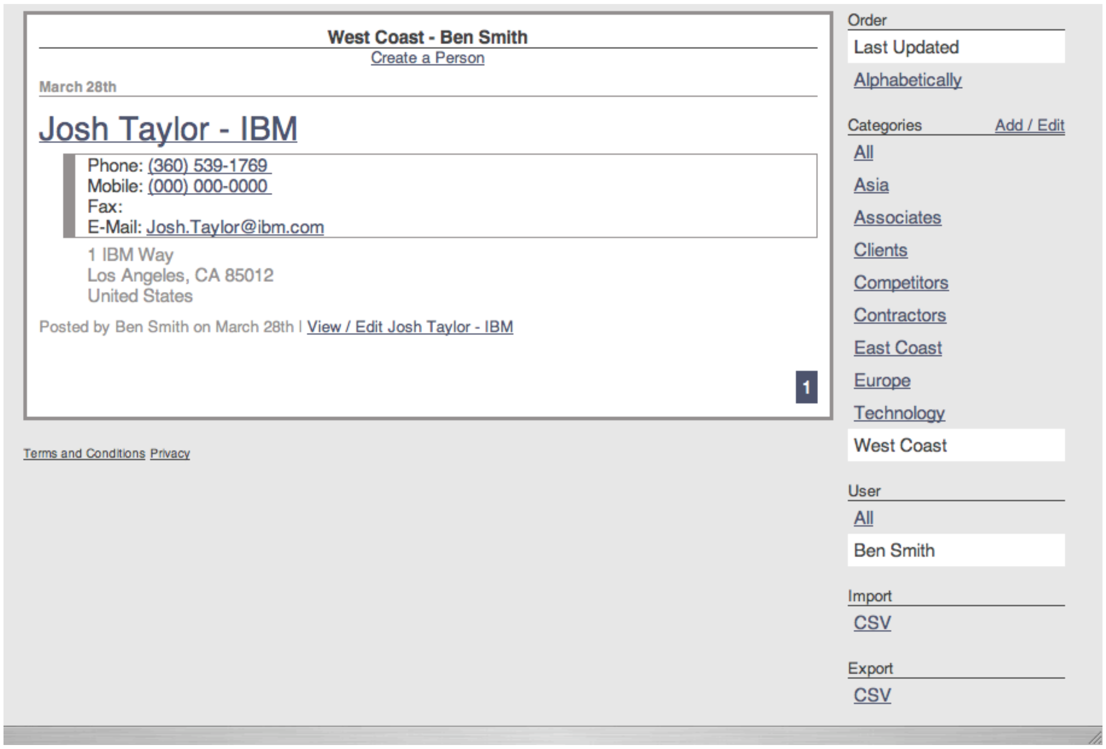


Ok, let's type "Technology" and click "OK."

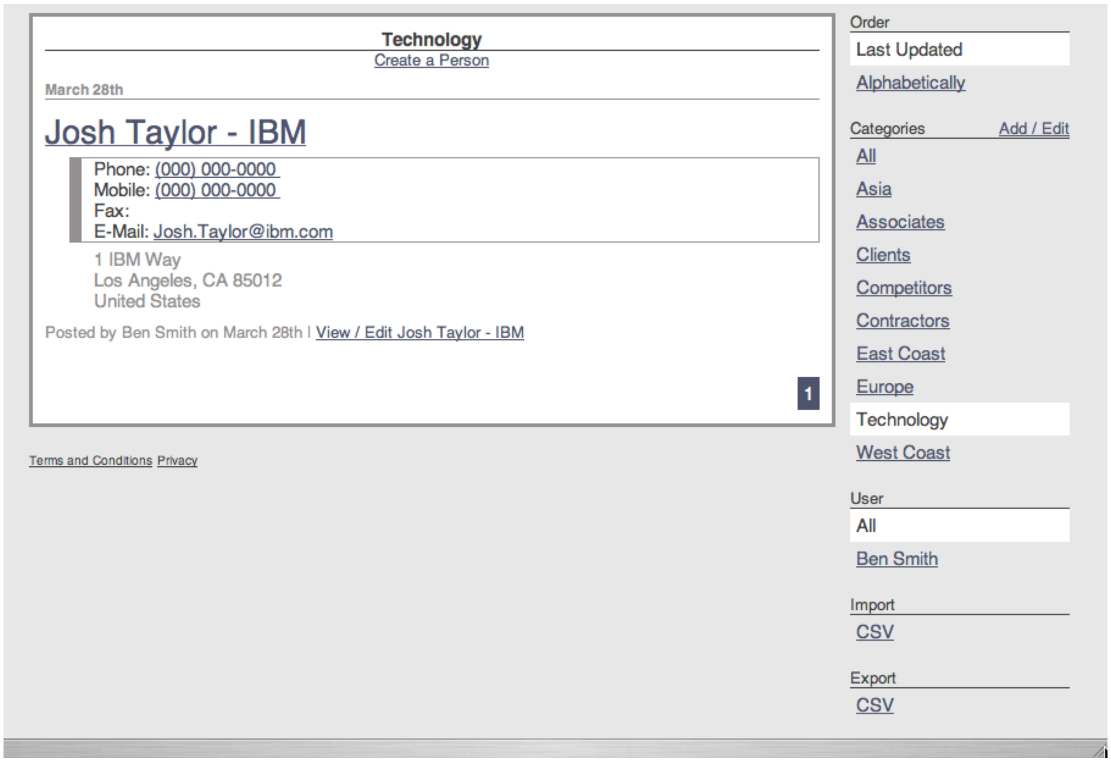
Great! That's it. I could add more categories, but I think this will do.



Let's see how this looks back on the main people page.

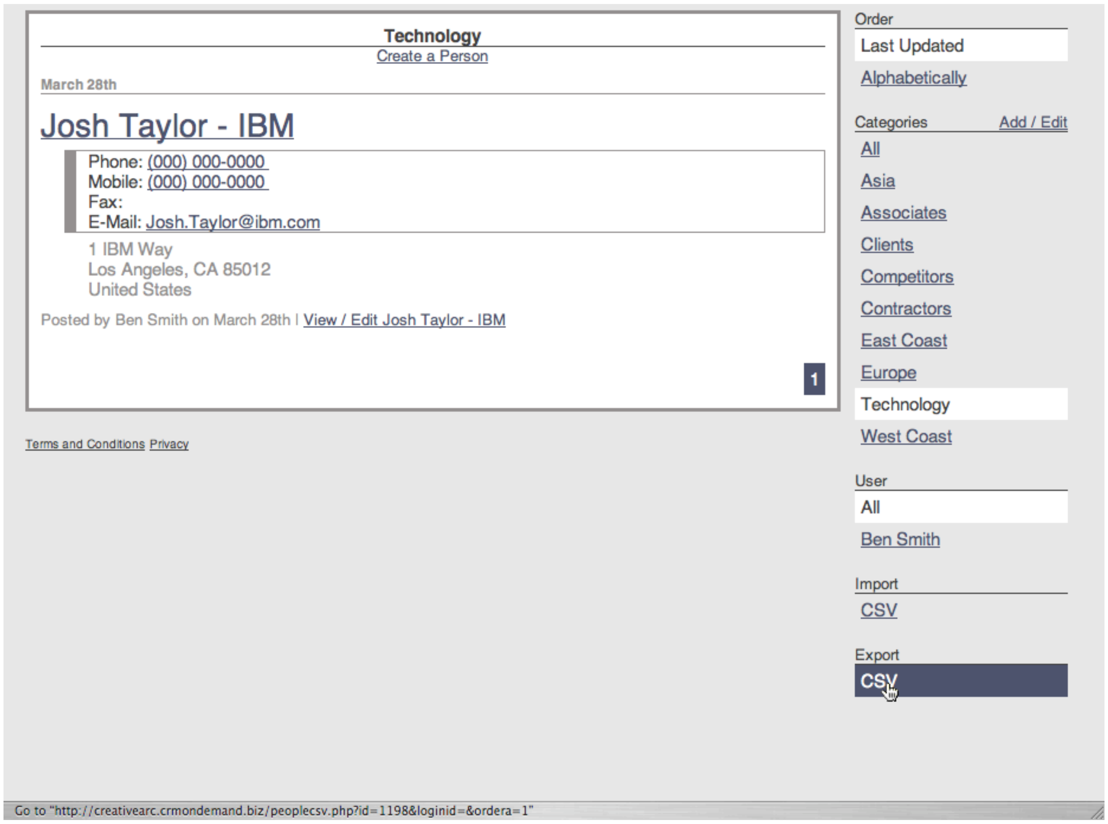


As you can see, Josh Taylor shows up under "West Coast."



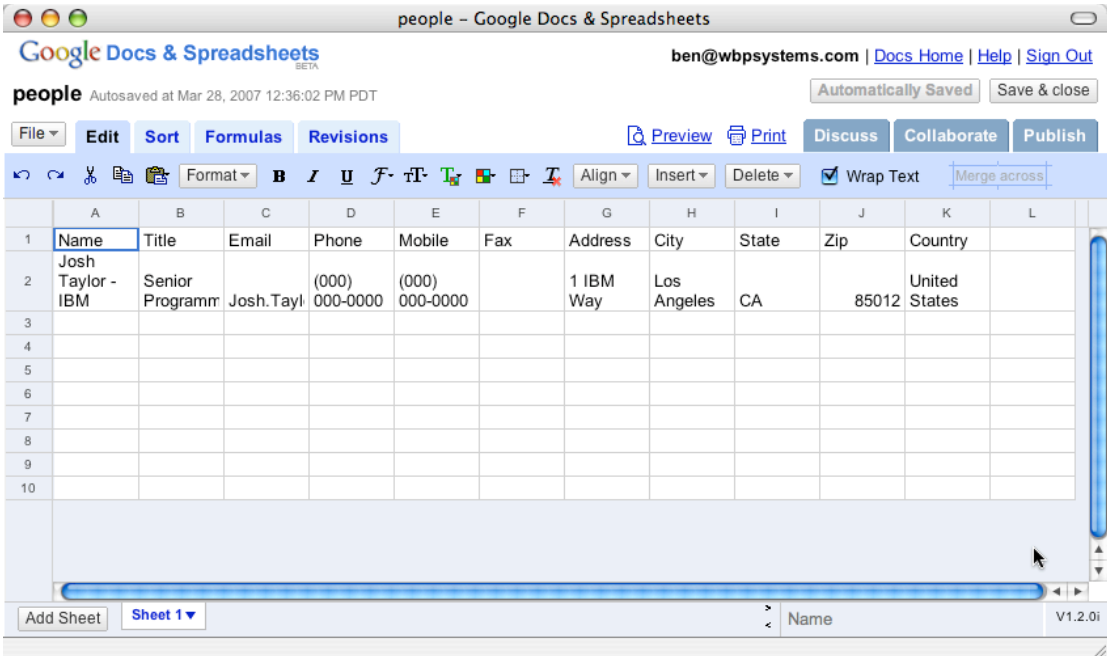
But also under "Technology."

Let's try those export features.



Now, just click "CSV."

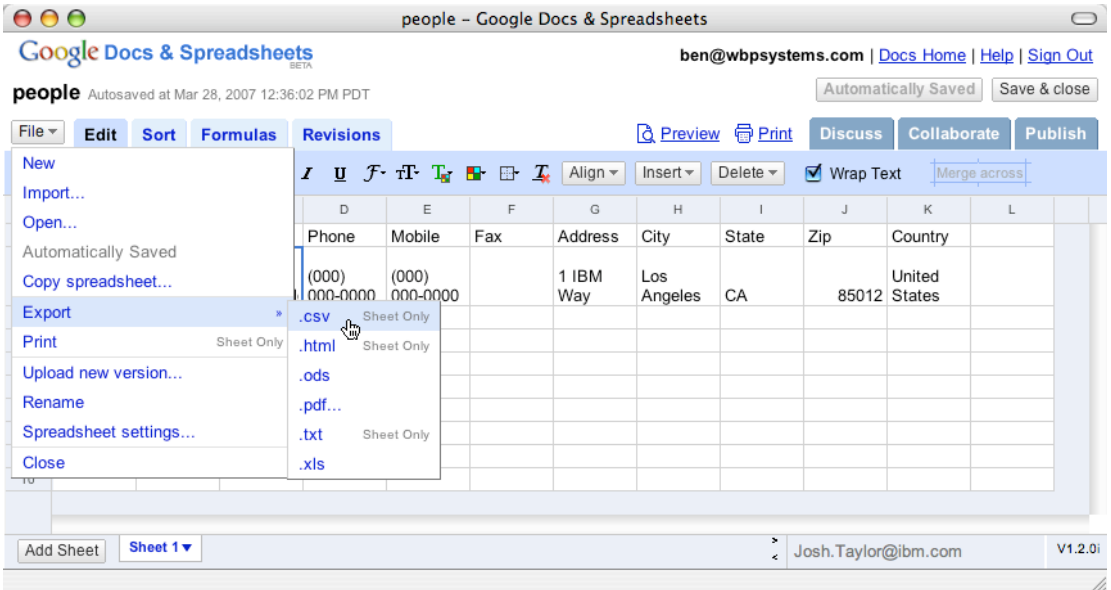
Ok, now we have a file downloaded containing this person (you can export as many people as you want, I'm just exporting one to make it easy to understand). You could open this files with Outlook, Thunderbird, whatever but perhaps the easiest type of application to understand this is a spreadsheet application. Here is the exported file in Google Spreadsheets.



Notice how the first row is the field names from Heap? These are key. You have to match these fields when you are importing. You don't have to have all of them or anything, but this way Heap understands what fields you are trying to import into. If Heap encounters a field it doesn't understand, it simply ignores it.

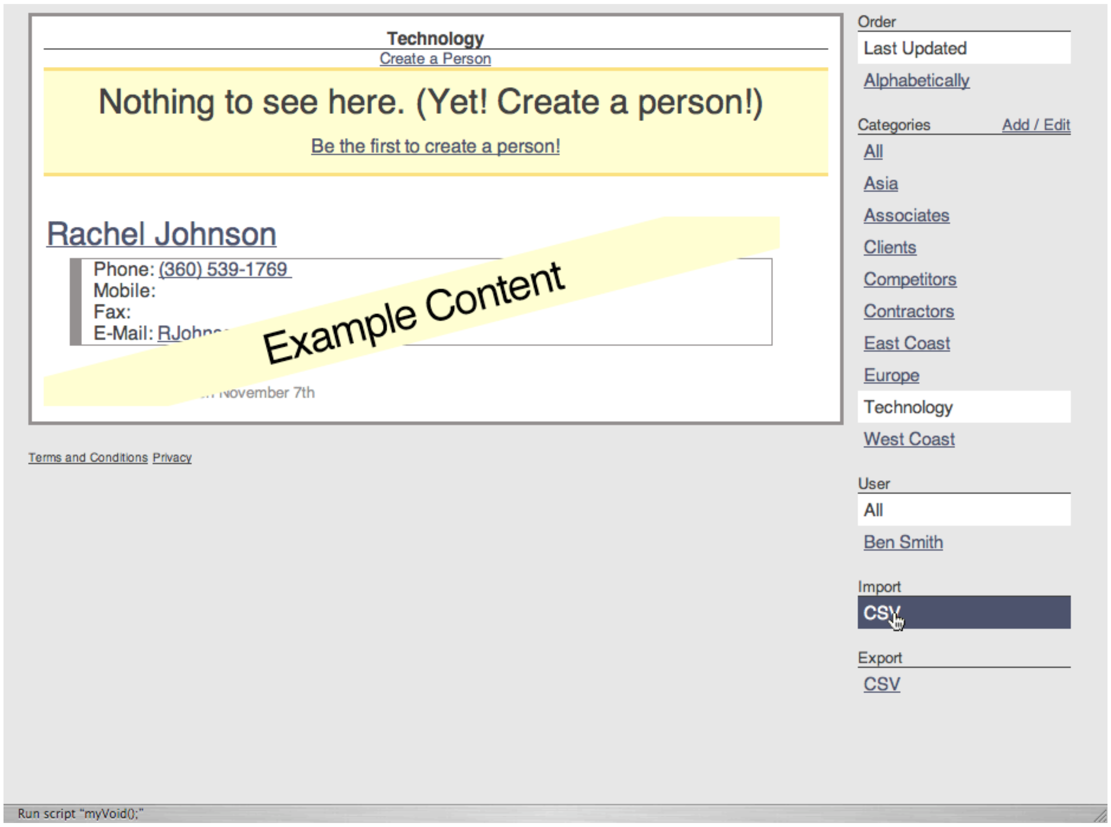
Let's give importing a try. First, I'm going to delete "Josh Taylor."

Ok, let's export a CSV from Google Spreadsheets.

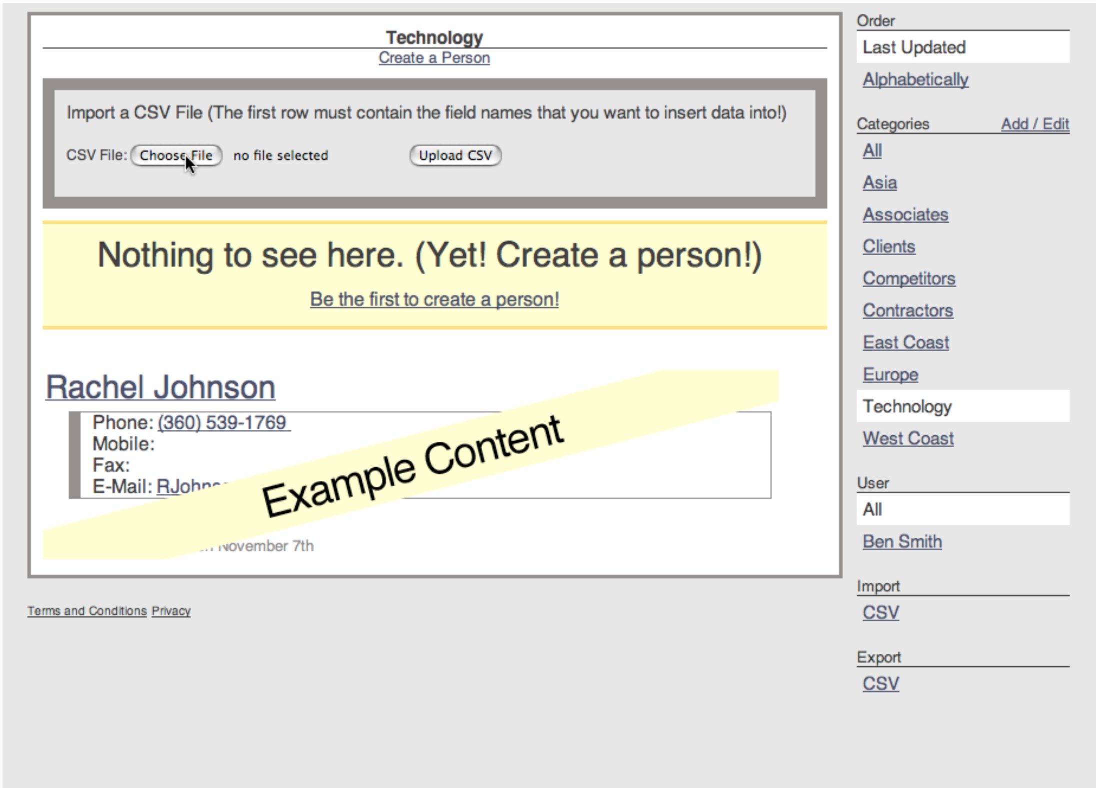


Just choose "File"->"Export"->".csv"

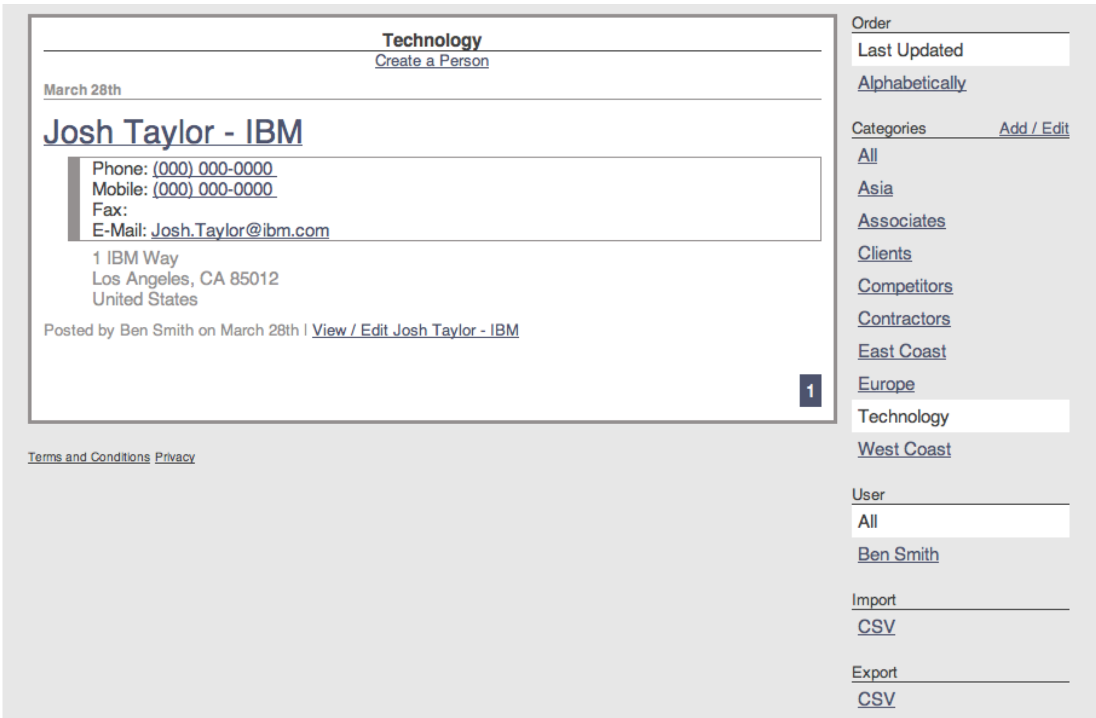
Great! Let's import it.



Just click on "CSV" under "Import."



Alright, now click on "Choose File" (Mac) or "Browse" (Windows). Once you select the file on your hard disk, click "Upload CSV."



Josh Taylor has now been imported.

Leads, Opportunities, Customers and Archives

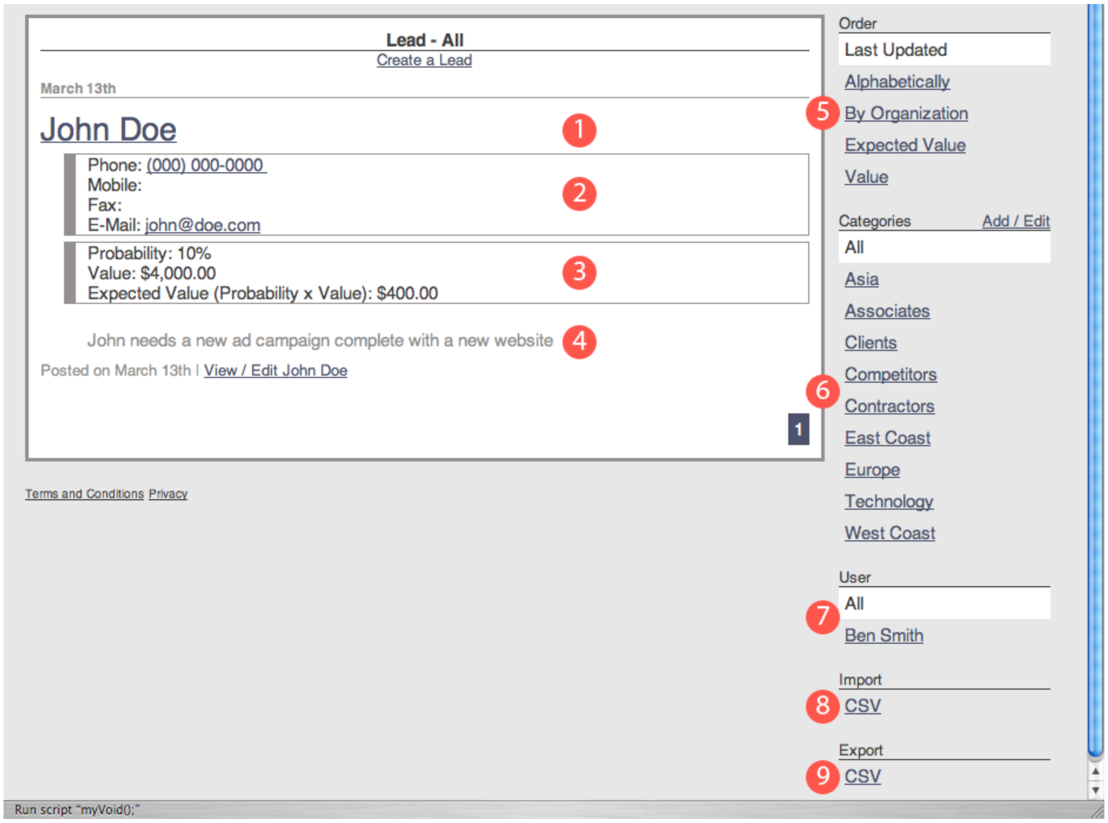
As discussed at the beginning of this manual, the lead, opportunity, customer and archive sections are the key parts of Heap.

Traditional CRMs often lock your data into roles in each of these sections forcing you to use them as they were intended. Heap doesn't have these sorts of restrictions. But, in the interest of clarity, let's cover how these categories are traditionally defined.

A lead is a unqualified prospect. In essence this is a person who entered their name on a newsletter signup sheet, signed-up on your website or, in the case of real estate, visited an open house. The key idea here is you have no way of knowing their level of interest. This is why in many CRMs you would not be able to define any sort of probability of purchase (because if you know enough information to define a probability then they are no longer a lead).

An opportunity is a qualified prospect. You know what they want (and what it's worth), you have some idea how likely it is for them to buy. Once they purchase, they are converted into a customer.

"Lead," "Opportunity" and "Customer" in Heap are almost identical. You *can* use them as intended. But, in some cases you might want to enter a customer directly, or apply a probability to a lead; whatever. Heap doesn't force you to do anything. Let's take a look.



1 is the name of the person (and company if applicable).

2 is the contact block. This includes the phone number, mobile, fax and email address. The phone and mobile are both links to Skype and the email opens your mail client.

3 is the financial block, describing the value of the lead. Notice, that despite the fact that we are looking at the lead page, we have a probability and value.

4 is the "More Info" field. This describes exactly what the lead, opportunity or customer wants with this particular transaction. It's in essence a note field, but it's the most important note field, so important that we show it when we are looking at a list of leads (or a list of opportunities, customers or archives).

5 is the order option for the page (I hope this is getting pretty familiar to most of you). But, we have a couple of extra options on the lead, opportunity, customer and archive pages: Value and expected value.

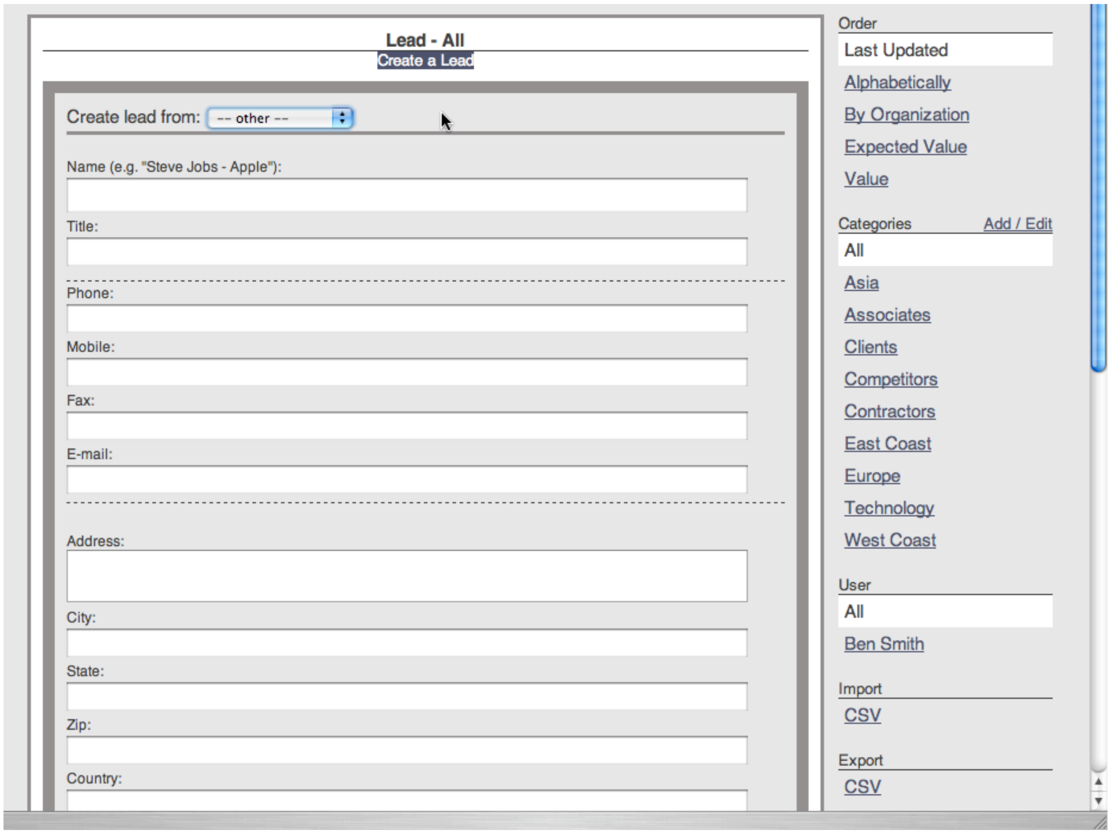
6 is the same categories as in the people section. Just like in people, a lead, opportunity, customer and archive can be in many categories. For the sake of my sanity, and perhaps those who have read this manual so far, I will not discuss this subject further other then to say if you have not read the people section and the messages section you should do so now. The creation of categories (which is the same throughout Heap) is discussed in detail in the messages section, while the idea of a single item being in multiple categories is discussed in detail under people.

7 is a list of users that you can use to filter your results (much like you do on the people section). However, in this case you are not filtering by the creator (as you do in the people section), but rather managing users. If an user is not managing anything, they will simply not show up in the list.

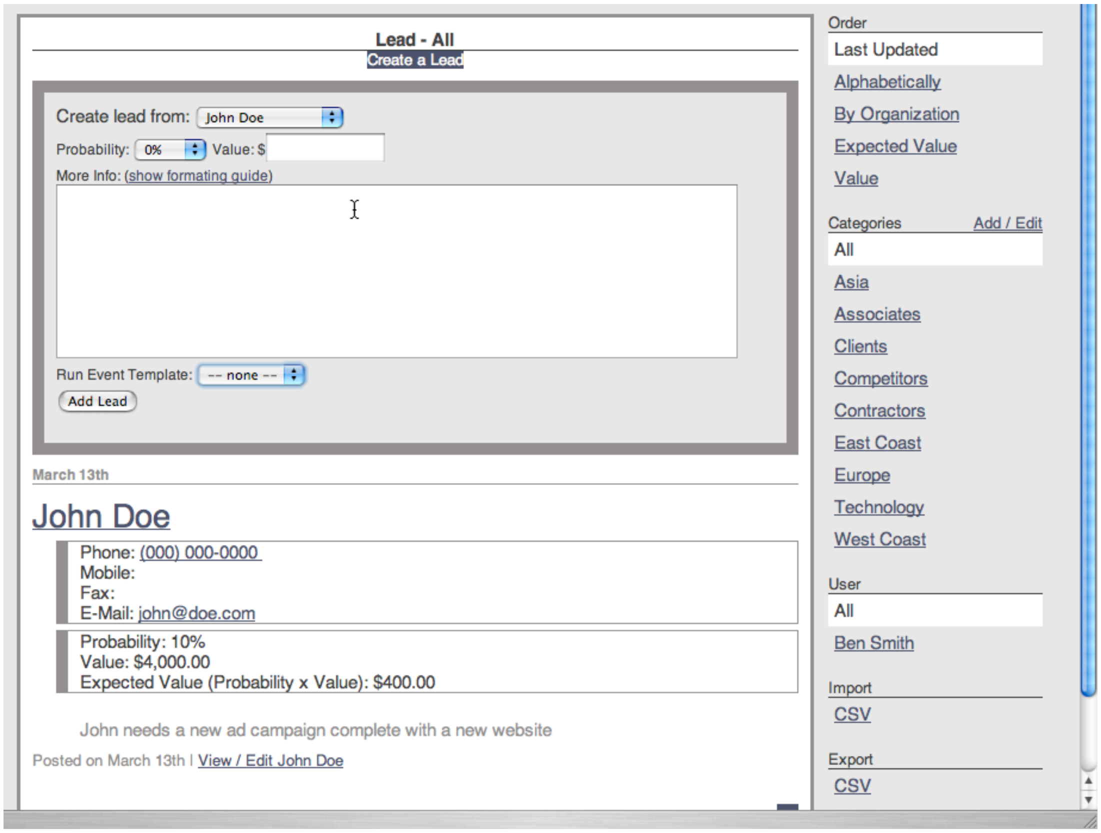
8 is a tool that allows you to import leads (in this case) directly. It works exactly the same here as it does in the people section.

9 allows you to export the data you are currently viewing in CSV (again, exactly like the people section).

Ok, let’s create a lead.



So, I clicked on “Create a Lead” and it shows me all these fields for creating a person. But this is a returning customer, so I’m just going to select “John Doe” from the “Create lead from:” drop-down.



What the heck happened? Well, when the "Create lead from:" field is set to "other," you are actually creating an entirely new person along with a lead (or opportunity, customer or archive). But, when they are an existing person, the new lead is simply associated to that person.

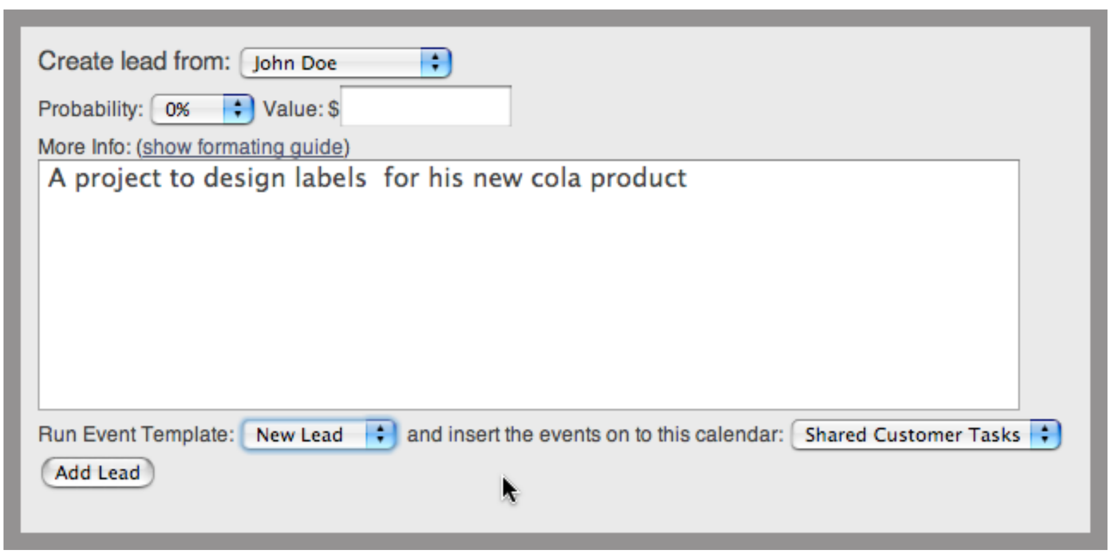
Let's discuss the fields on the screen. Probability is the chance of this lead turning into a sale. When you are creating a new lead, Heap defaults to 0% (because you might not know). But you can simply click on the drop-down and change it to whatever you want. When you create an opportunity this value defaults to 50%; on customer 100%.

Value is the expected income from the potential sale. If you don't know, simply leave it blank.

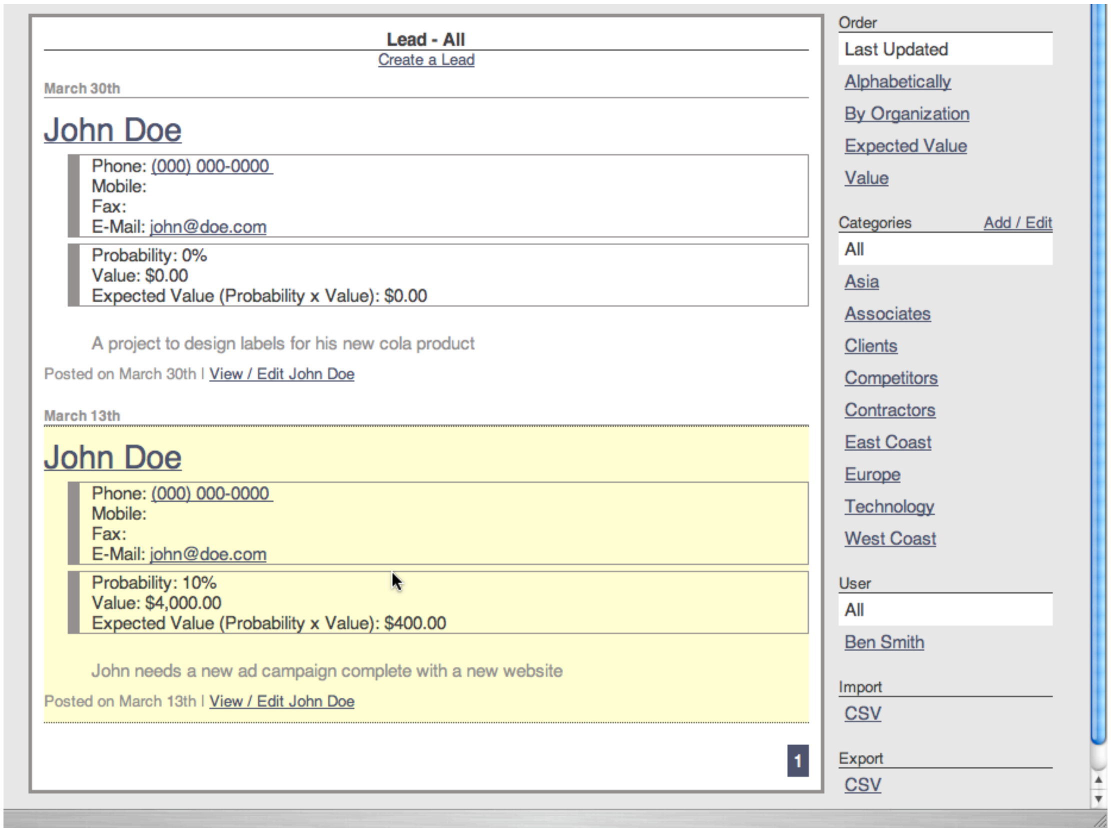
More info is the previously discussed note field. Just like messages and comments, this field also has a formatting guide.

Event templates allows you to create a large number of events automatically whenever you create a lead, opportunity, customer or archive. We will discuss using one right now, and the creation of event templates a bit later.

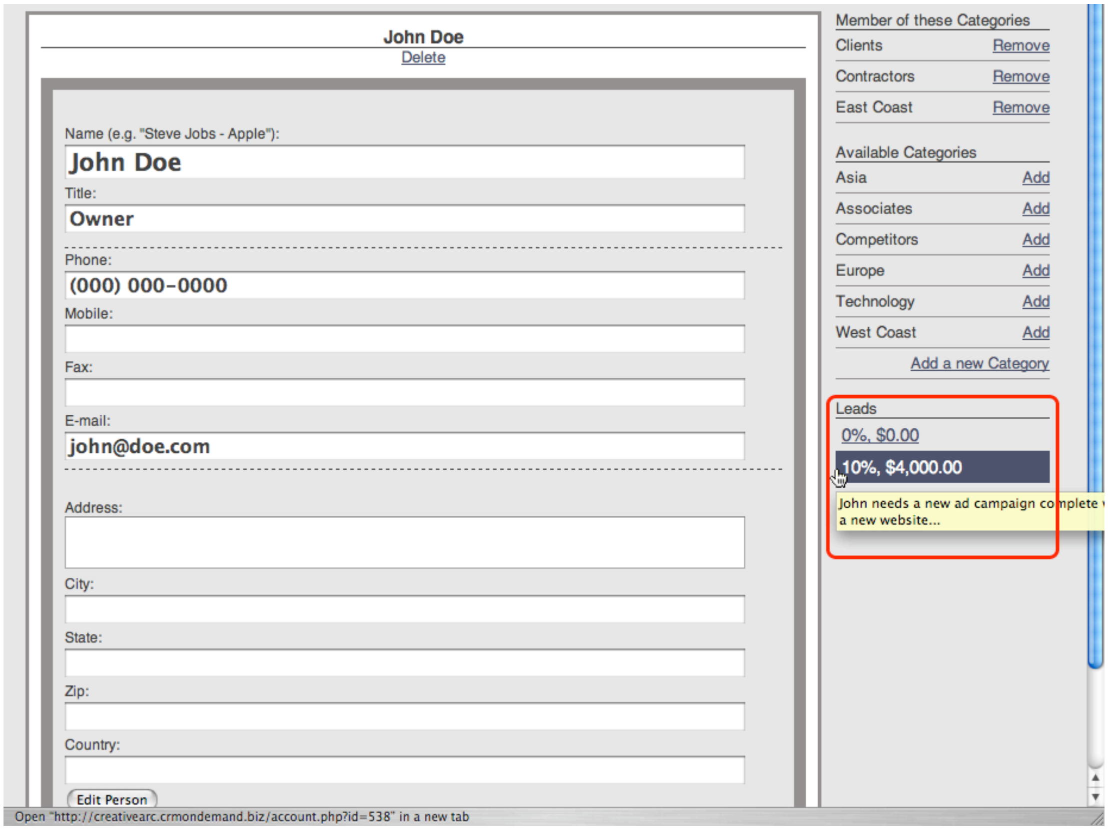
So I've filled out the form, take a look.



Alright, let's click "Add Lead."



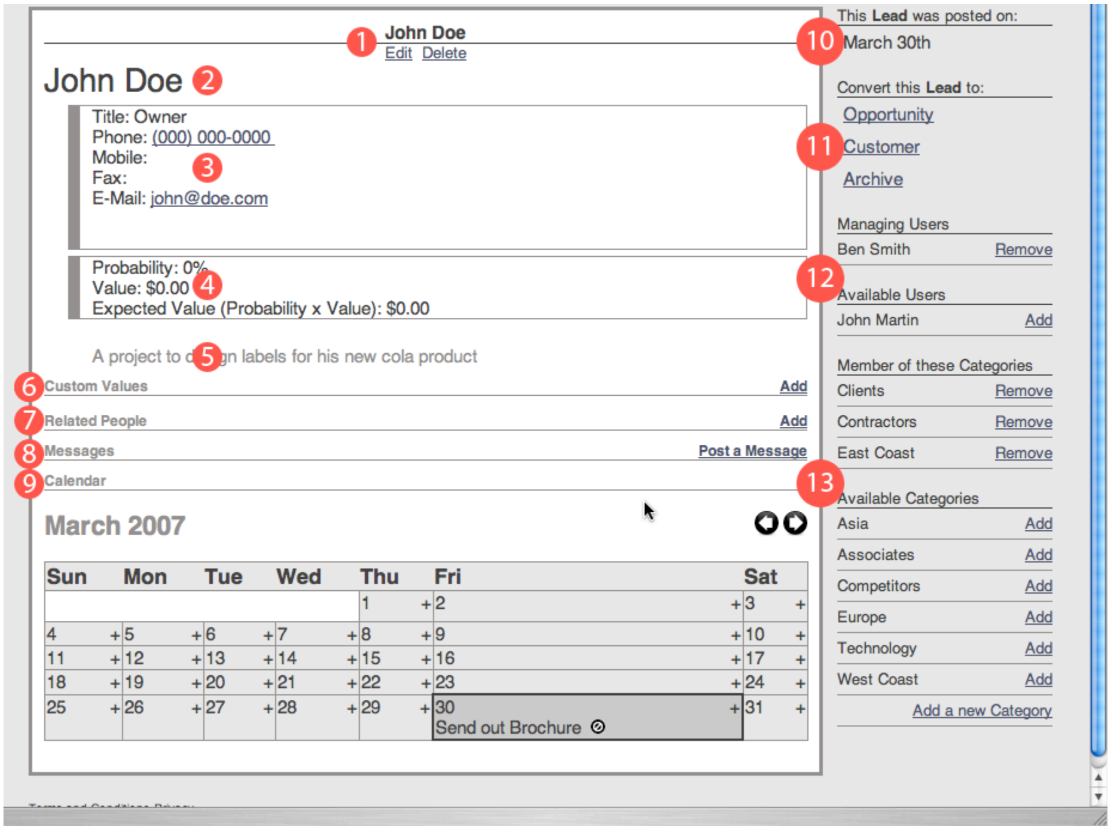
Wow, so there are two "John Does?" No, there are just two separate leads both linked to John Doe. Take a look at the John Doe person page.



As you can see there are two leads, each showing a probability followed by a value. If you hover over either one of the leads in the list you will see the value of the "More Info" field.

Opportunities, customers and archives also show up in this fashion, but "John Doe" is only associated to leads at the moment.

Ok, let's click "0%, $0.00" lead (the lead we just created). We could also go to the lead section and click on the item in that list; the result would be the same.



1 is the title line, including both an edit and delete button. It should be noted that if you click on the delete button, it will only delete this lead, it will not delete "John Doe." Clicking edit will allow you edit the financial information, the more info field and the contact info for John Doe.

3 is the contact block. Unlike, the contact block on the main lead page, this contact page also includes the address.

4 is the financial block, describing the value of the lead.

5 is the “More Info” field.

6 is the custom values section. With custom values any field that Heap doesn’t include you can add here. You can even run reports on custom values.

7 is the related people section. This is really handy when you have someone who is involved in the transaction besides the prospect themselves.

8 is messages. Any message that is associated to this lead shows up here. But, you can also create messages right here and they are automatically associated to this lead.

9 is calendar events and tasks. Just like messages, this is a calendar showing events and tasks that are associated to this lead (you can move from month to month using the black arrows). But (again, like messages), you can create events and tasks right here.

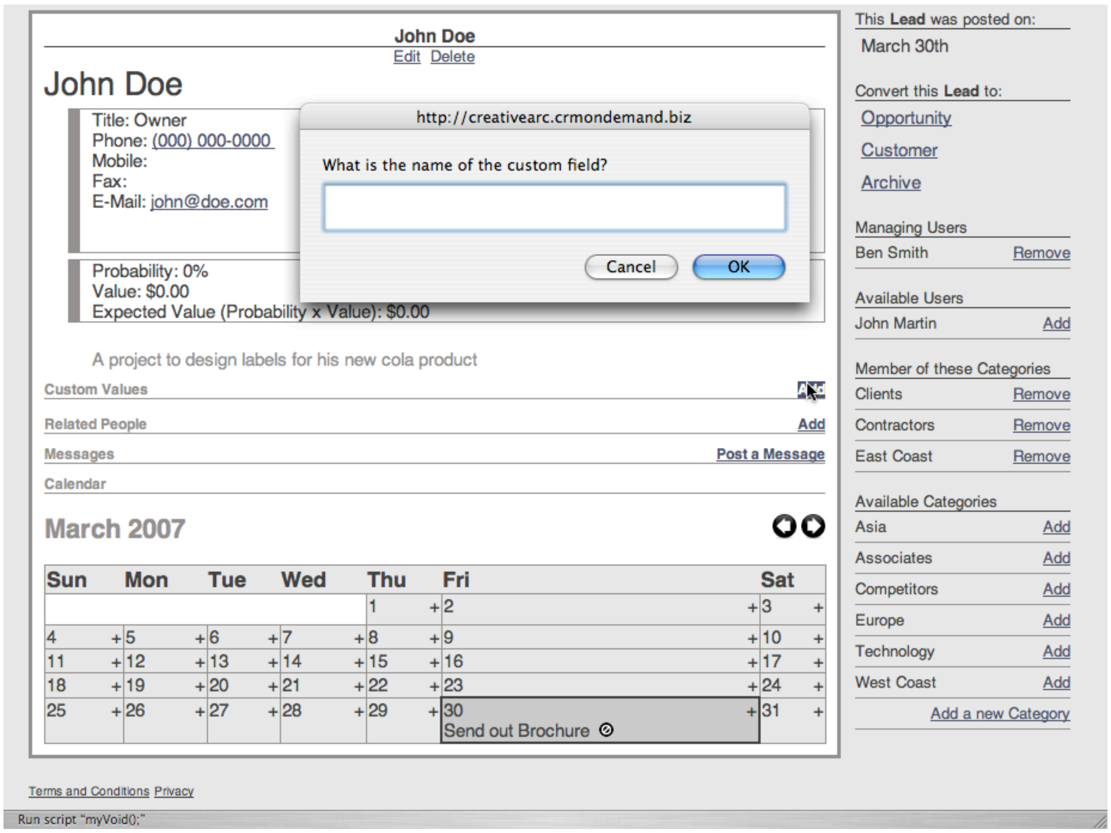
10 simply shows you the date the lead was created.

11 allows you to convert this lead to an opportunity, customer or archive.

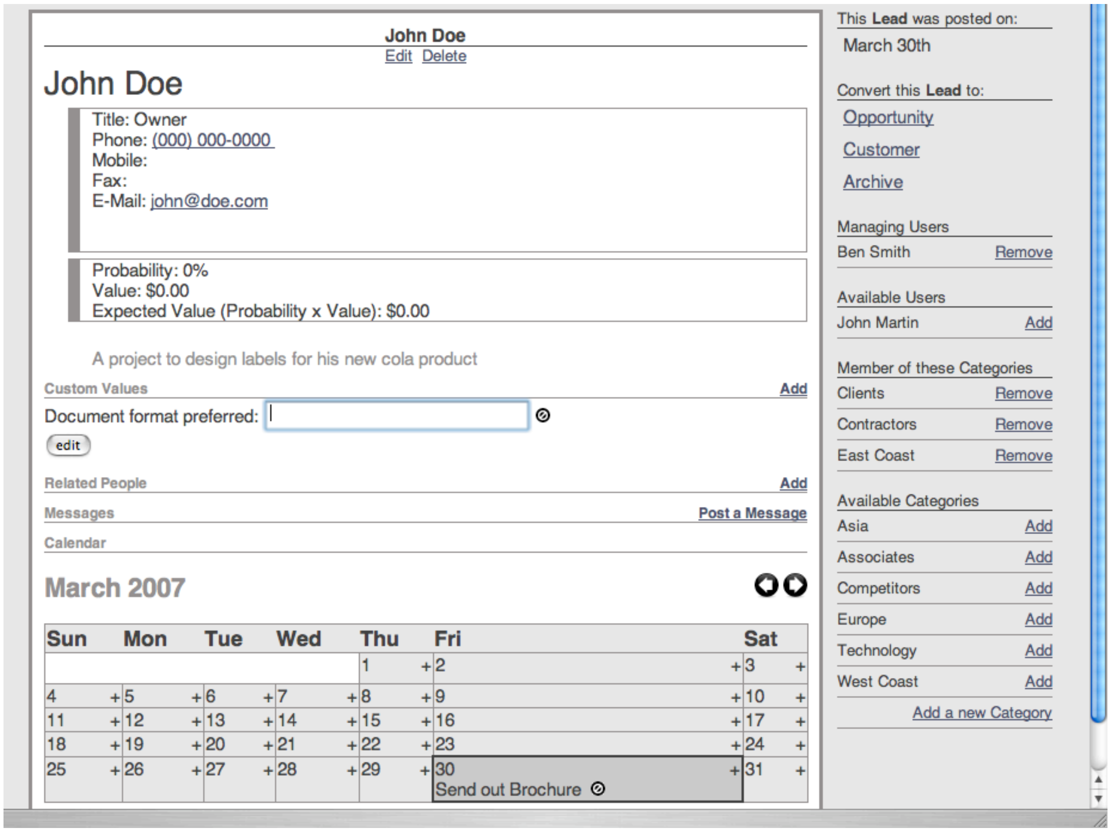
12 is a list of managing users. Any lead, opportunity, customer or archive can have as many managing users as you want. Just click on the “Add” button next to the user’s name you want to add as a managing user. You can remove them just as easily by clicking on “Remove.”

13 allows you to put this lead in as many categories as you want. For a more detailed explanation please look at the people section of this manual.

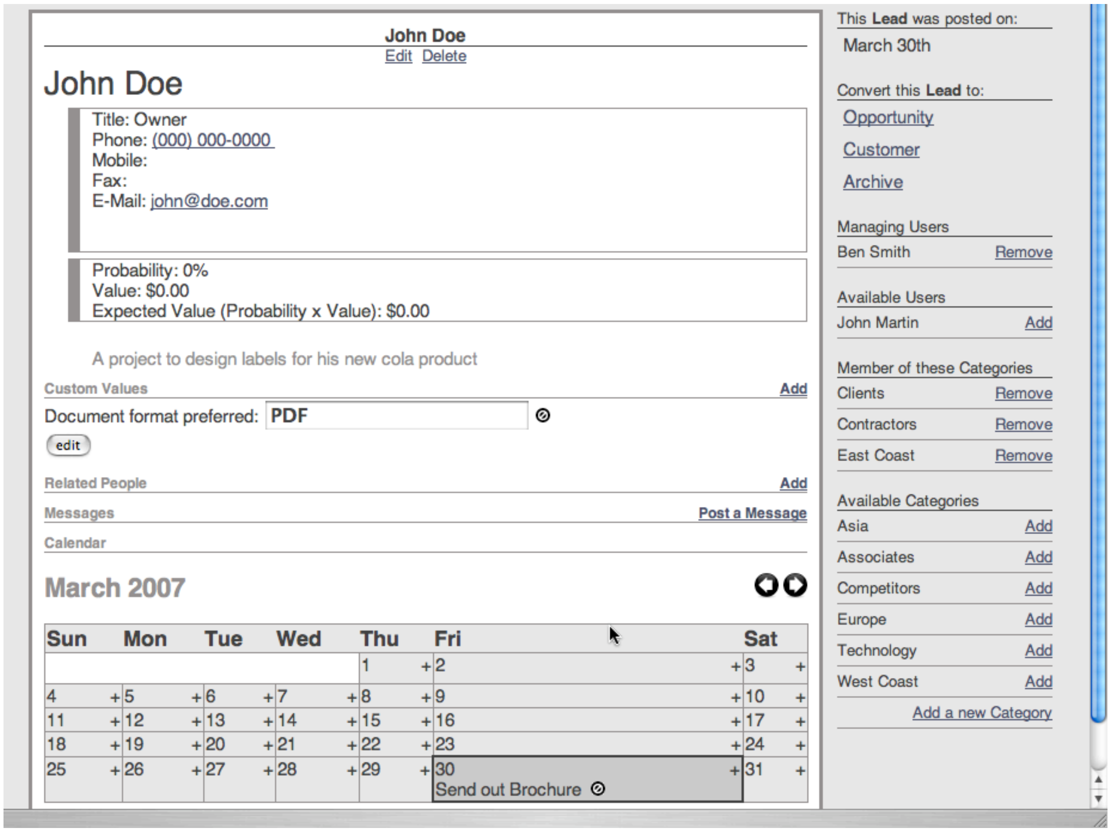
Let’s cover a few things. Let’s create a custom value. Select the “Add” button on the “Custom Values” section.



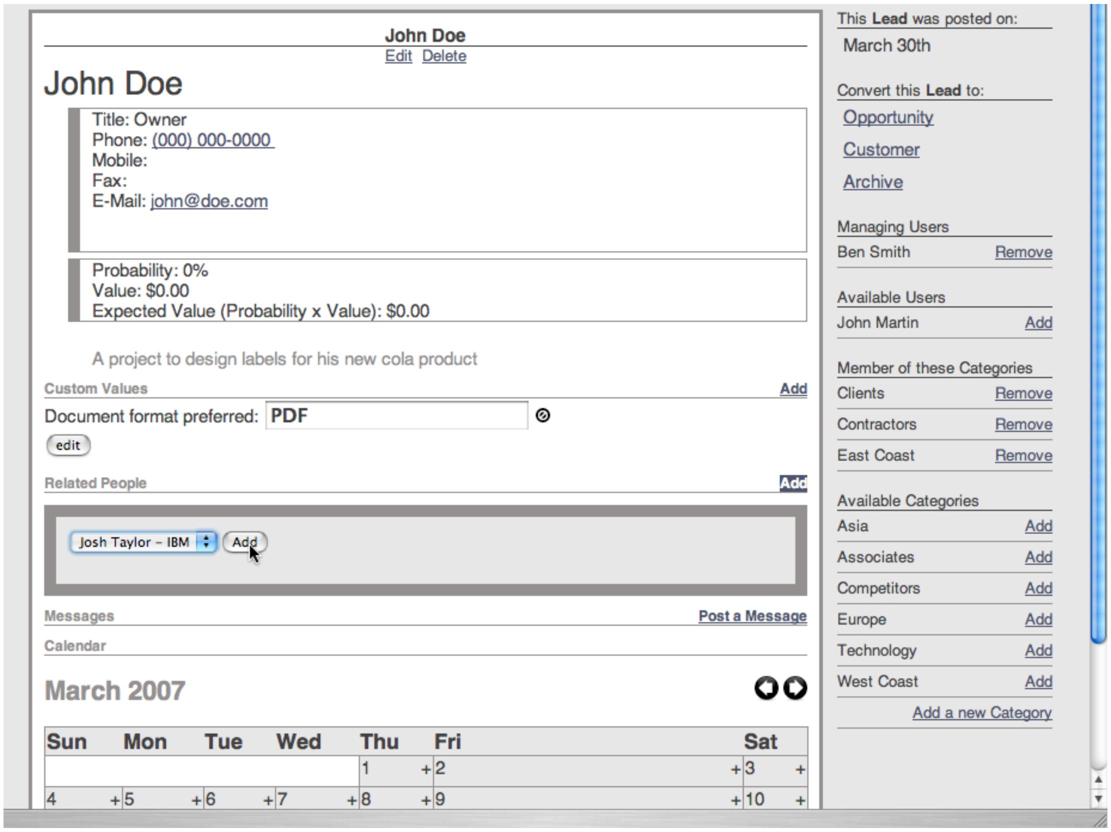
Ok, so I’m going to name the custom field.



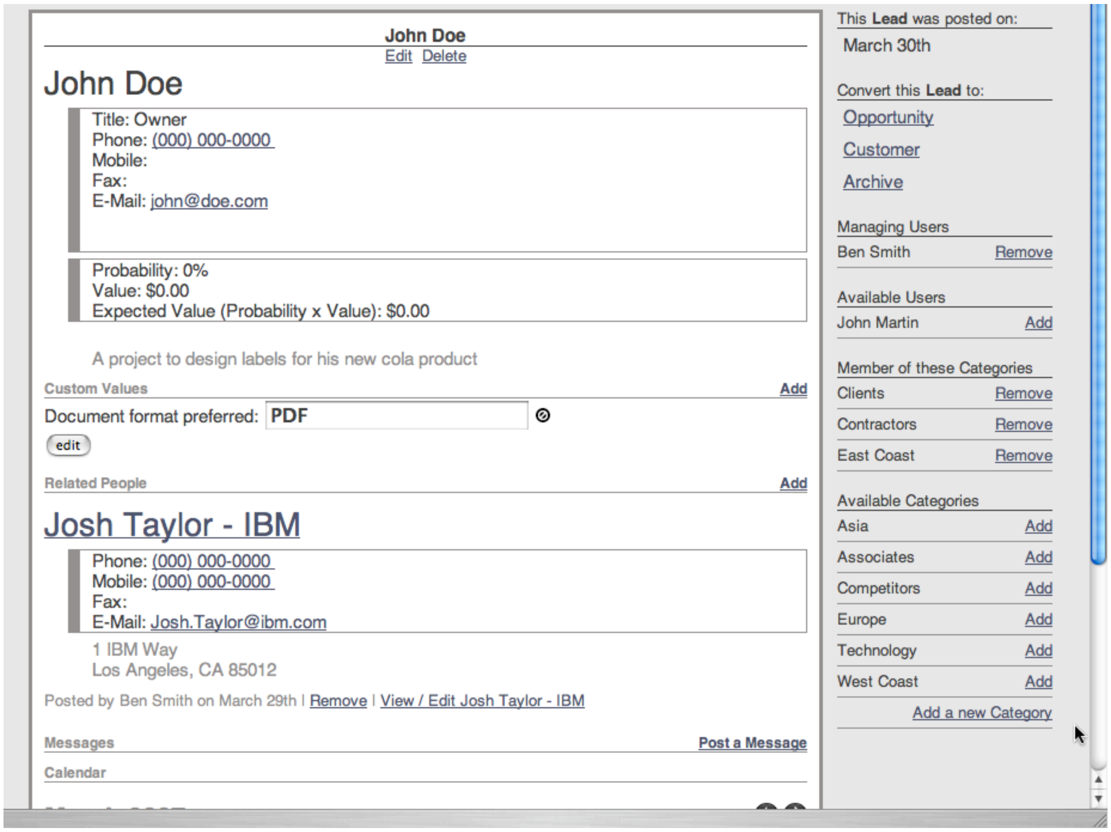
Now "Document format preferred" will show up as a custom field on all of your leads (until you delete it). Ok, I'm now going to put in a value and hit "edit."



And that's it. It's that simple to create a custom value. Let's relate a person.

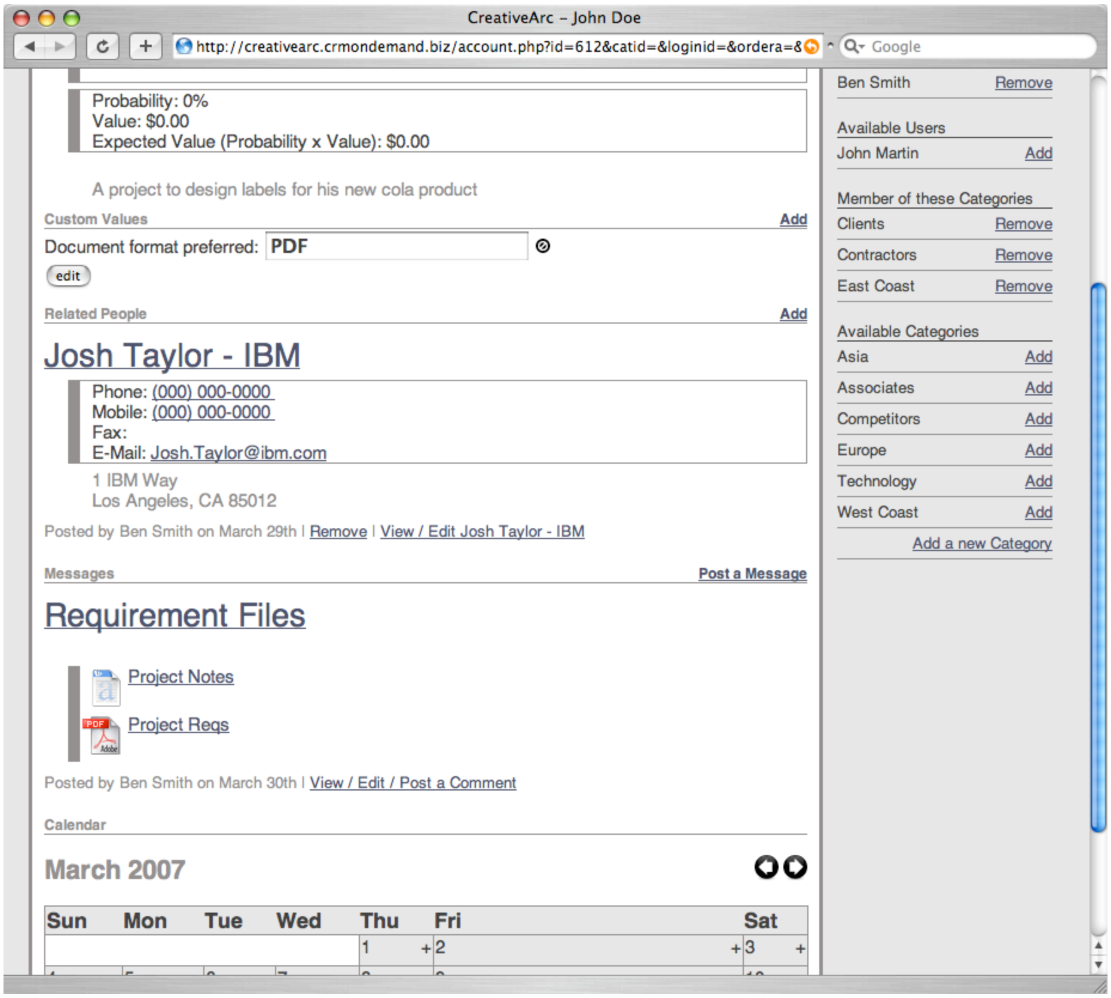


I'll just select the person I want from the list and hit "Add."



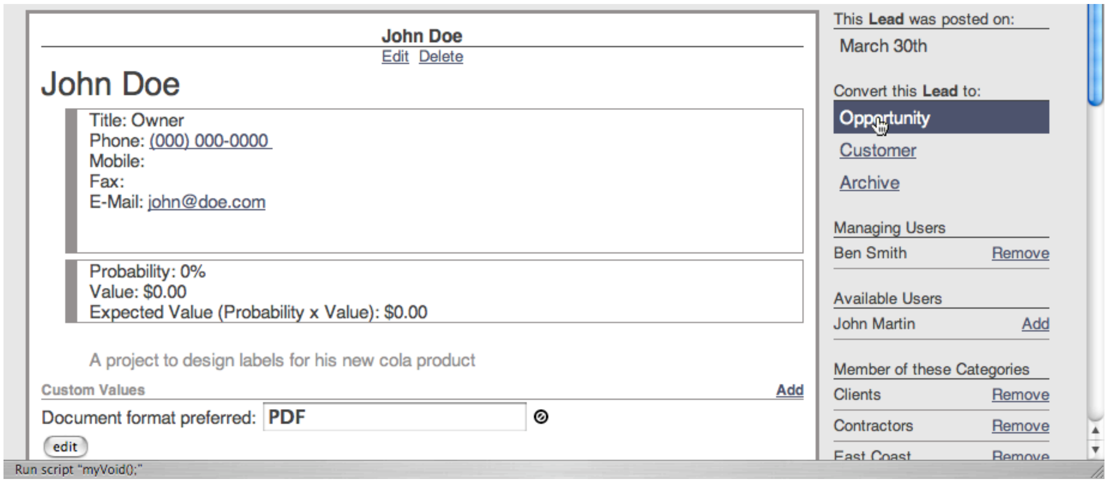
That's it. Now I can call, email or fax Josh Taylor whenever I want without having to go and find him.

Ok, I want to attach some files. How do I do that? With a message.

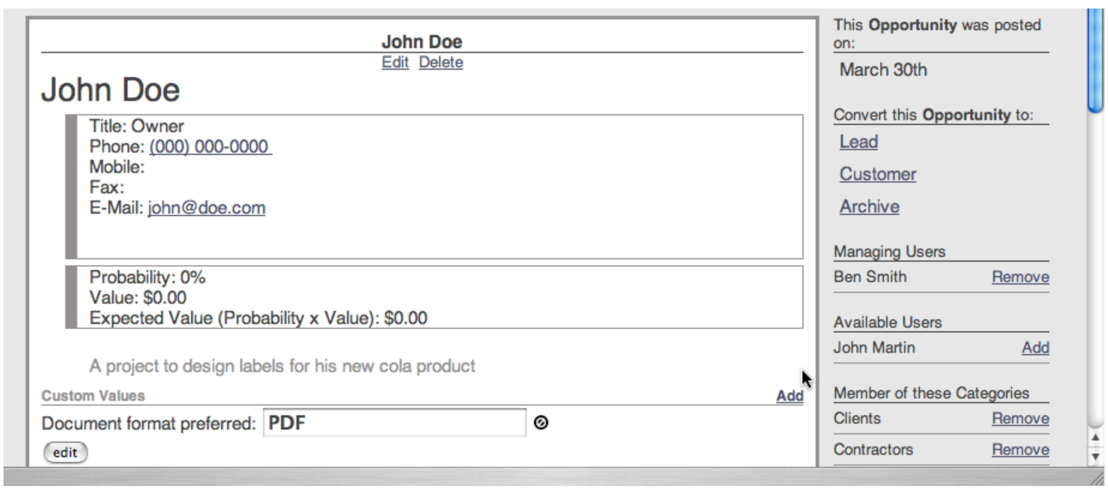


That's it. Posting a message here is just like posting in the messages section.

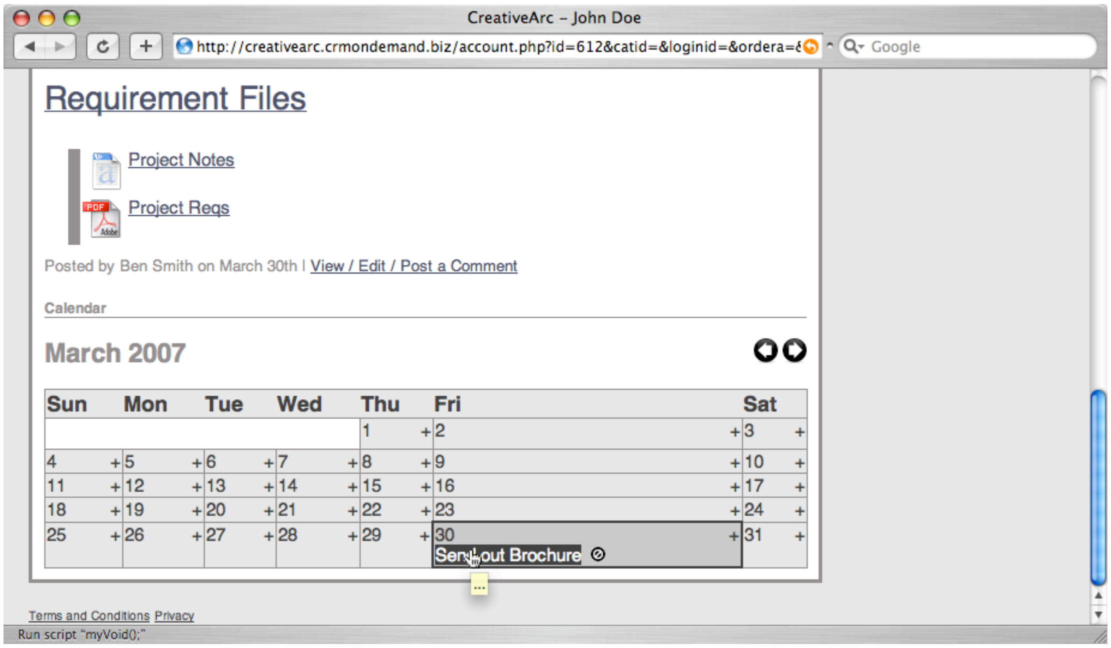
You know I don't think this is a lead any more, let's convert it to an opportunity.



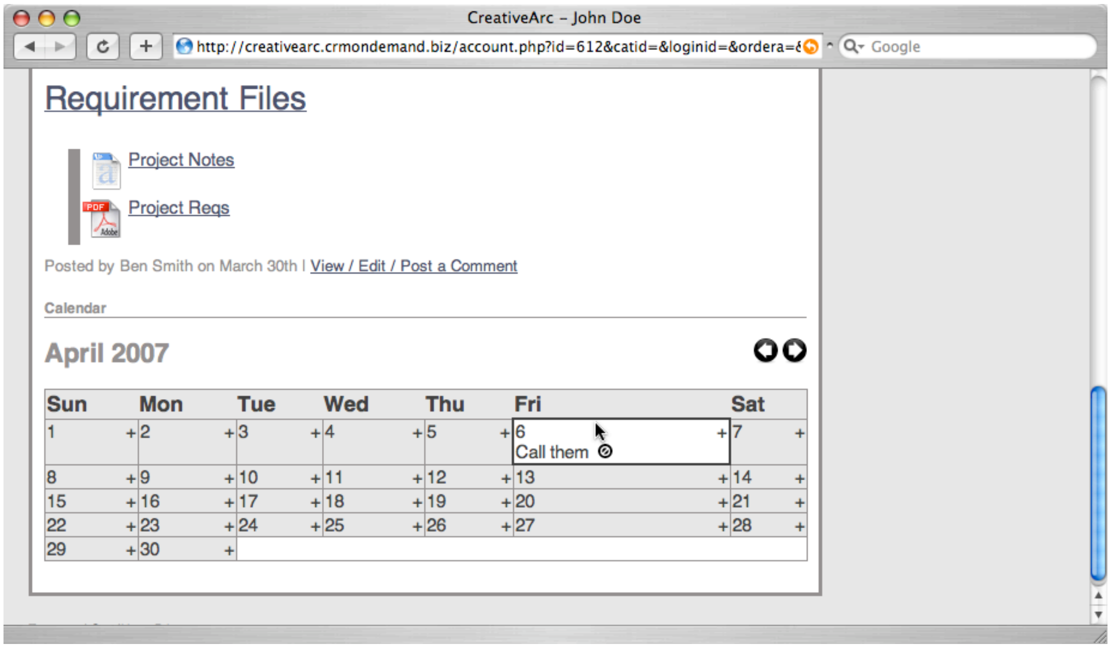
All I have to do is click on "Opportunity."



That's it. Remember, the event template we used when we created this opportunity (lead at the time)? What did it do?



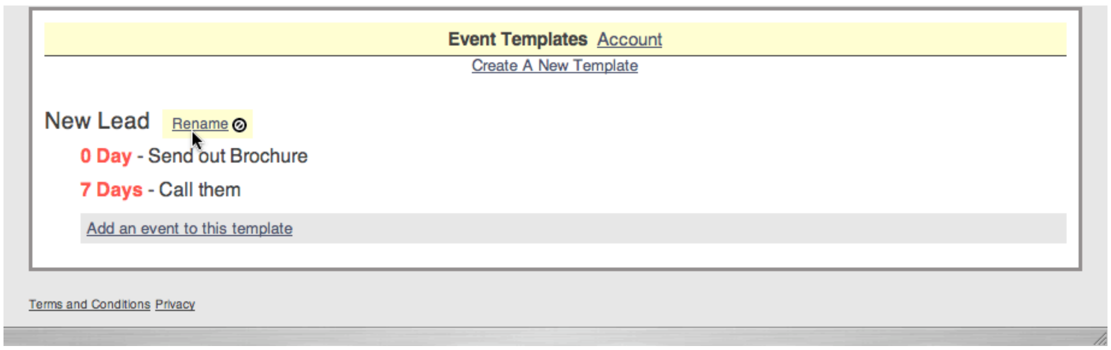
Well in the month of March it created a task of "Send out Brochure."



And in the month or April it created a task of "Call them." Ok, let's take a look at event templates.

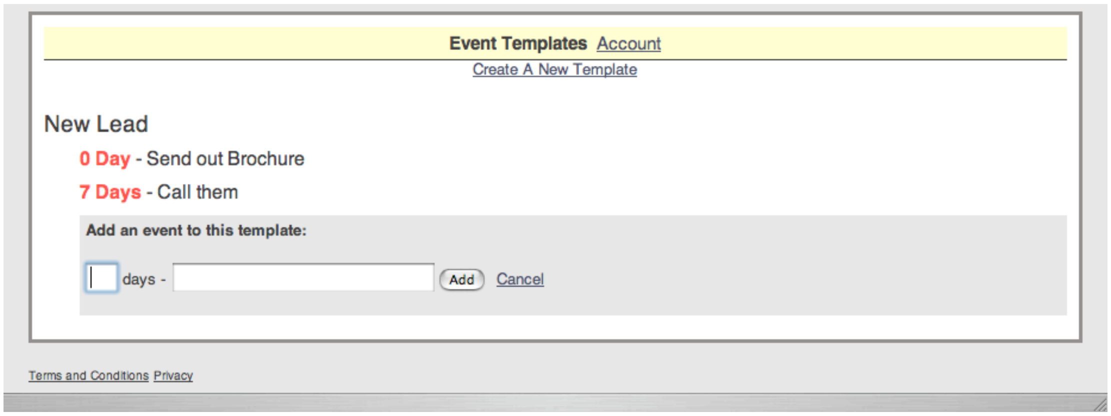
Event Templates

Click on the settings tab.

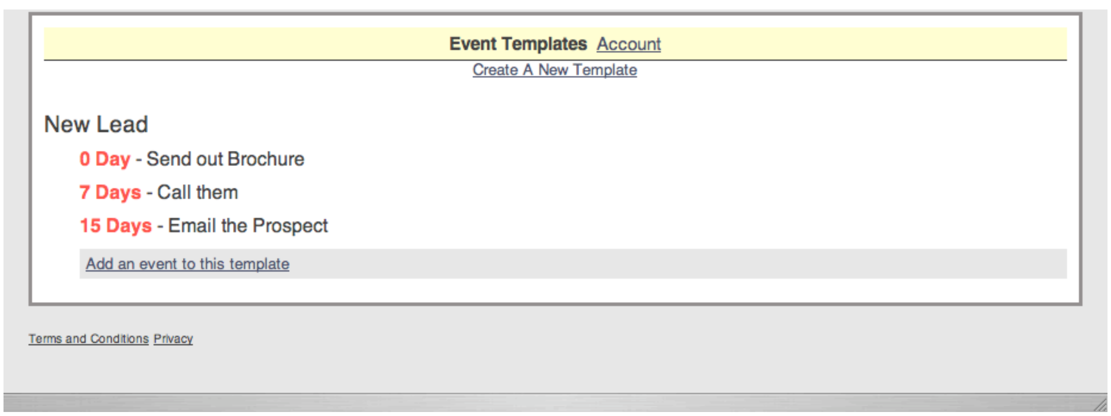


Ok, there is "New Lead," the event template we ran when we created the John Doe lead. So what does it say? Well, the first event says to create the "Send out Brochure" task on the day that it's ran. The second event creates a task named "Call them" a week after the template is ran.

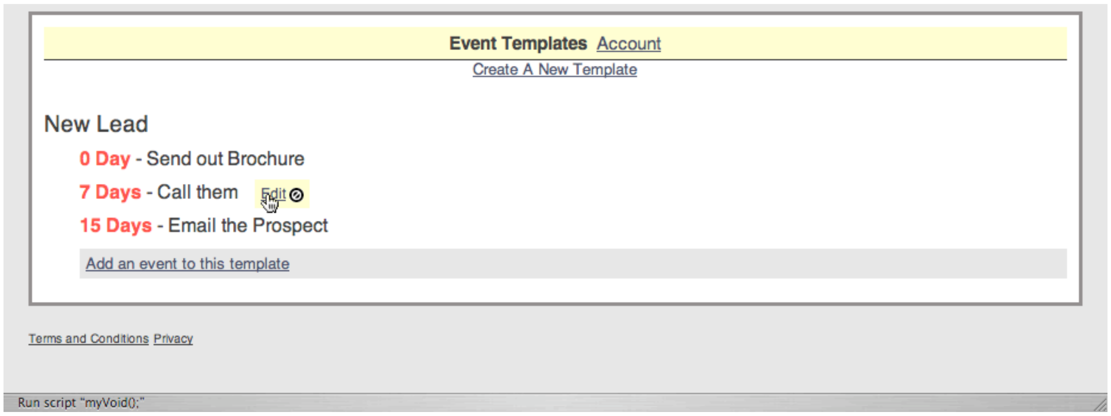
Let's add an event. All you have to do is click on the "Add an event to this template" button.



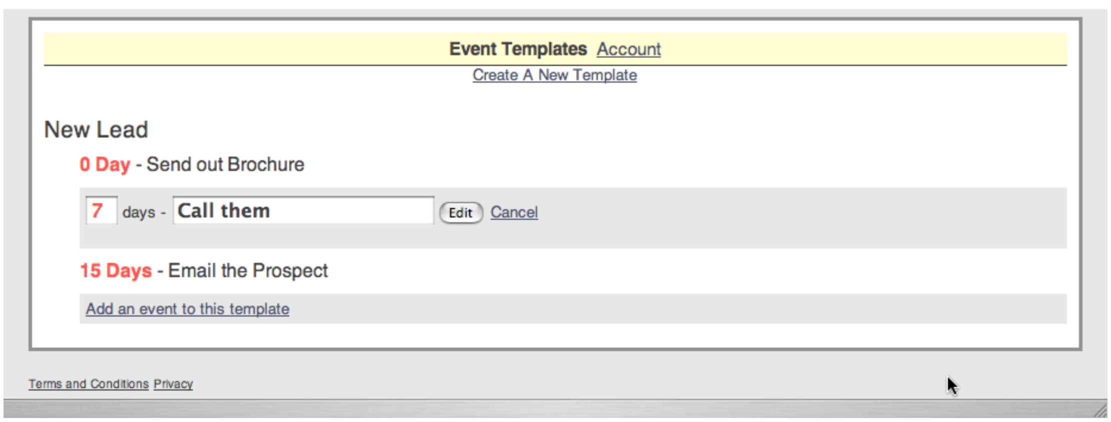
Ok, I want to create a task named "Email the Prospect" fifteen days after the template is run. So just put "15" in the days box and "Email the Prospect" in the long box. Press the "Add" button.



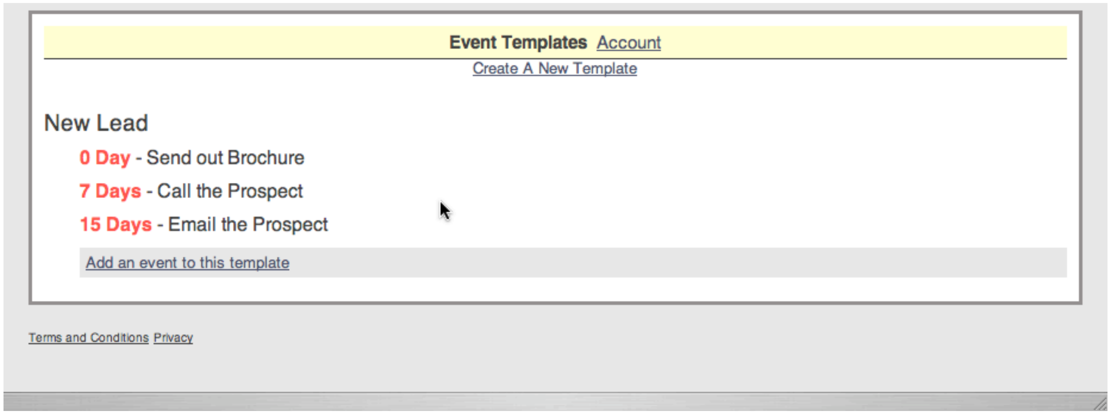
Ok, how about editing an existing item in the event template. Well as you run your mouse over each item you have an option to edit or delete the item.



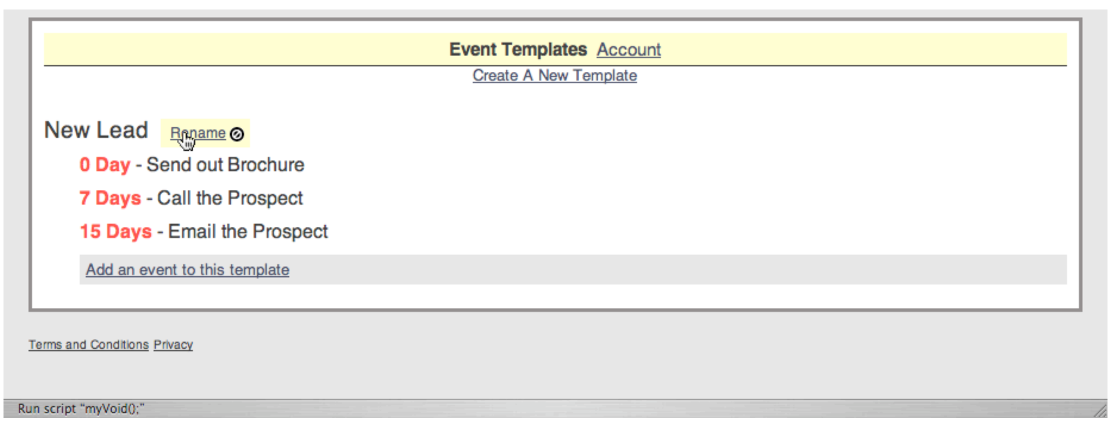
Ok, let's edit "Call them."



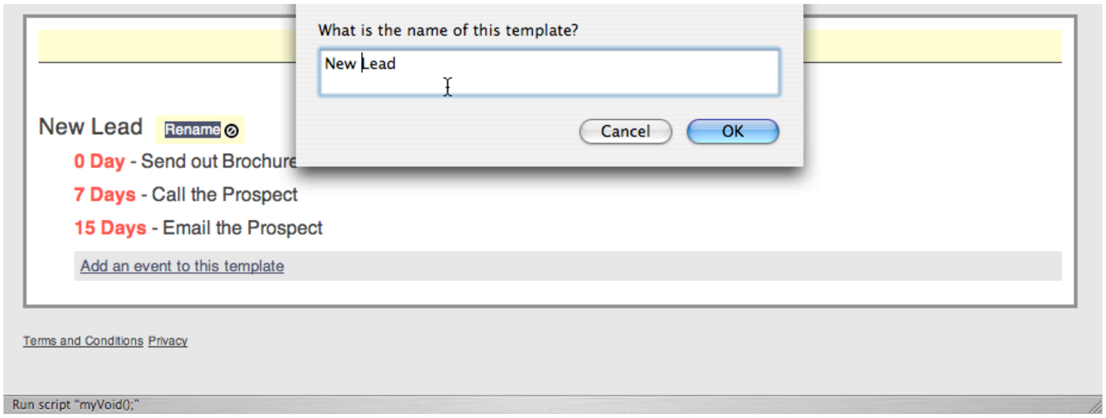
I'm going to change "Call them" to "Call the Prospect." Press the "Edit" button.



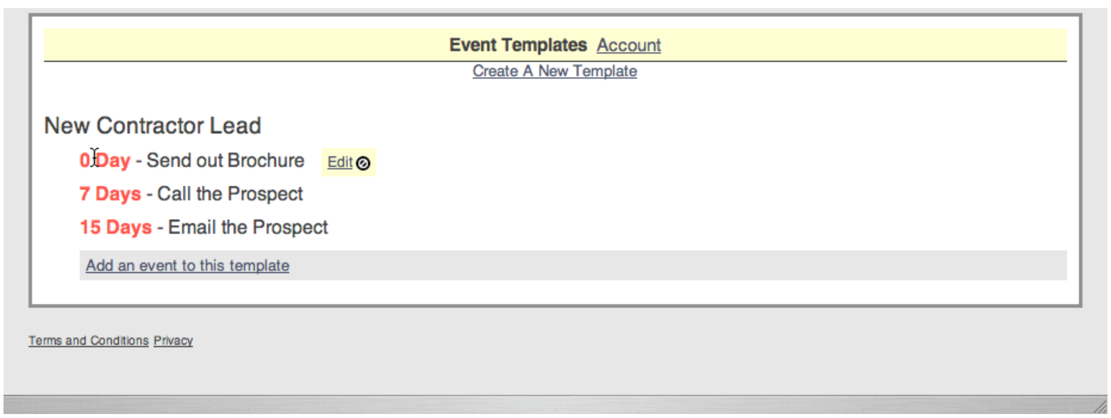
Ok, I don't think "New Lead" is a good name for this event template, so let's change it to "New Contractor Lead." When you hover over the title you get an option to rename or delete the event template.



Ok, let's click "Rename."



Ok, just change the name and press "OK."

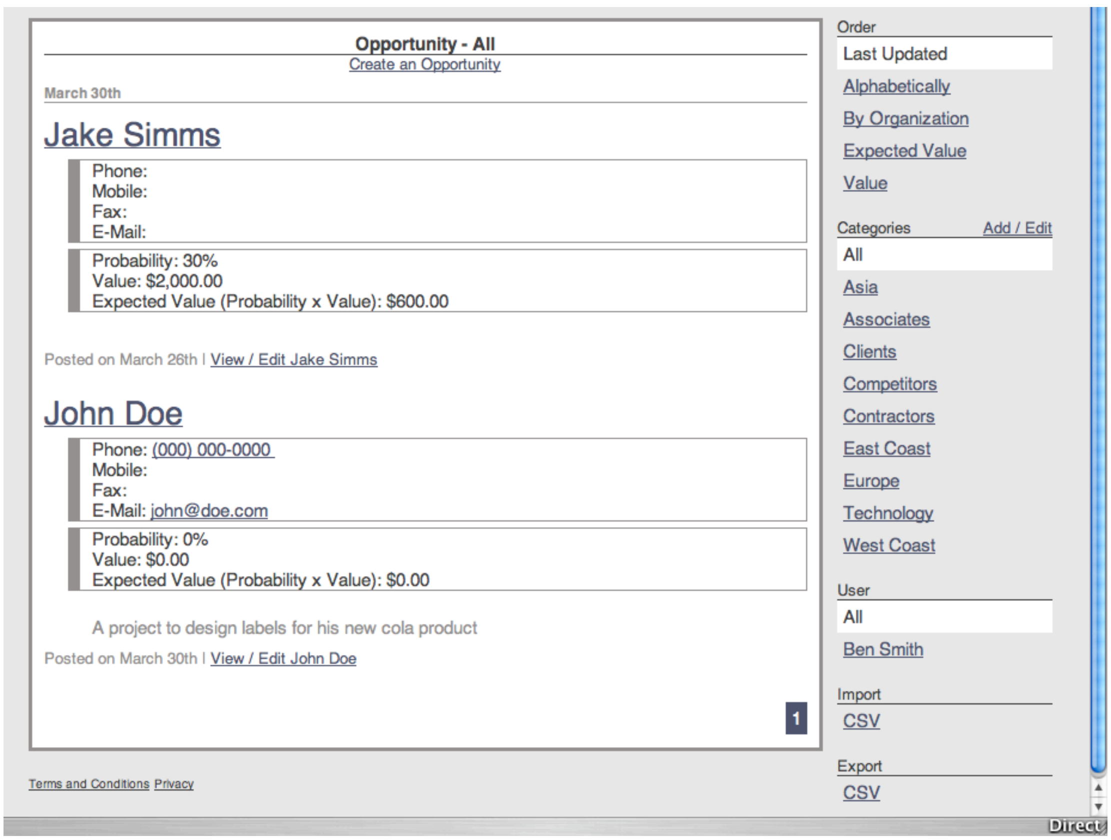


That's it! You can have as many event templates as you want, and you can create as many events / tasks in each of those templates as want.

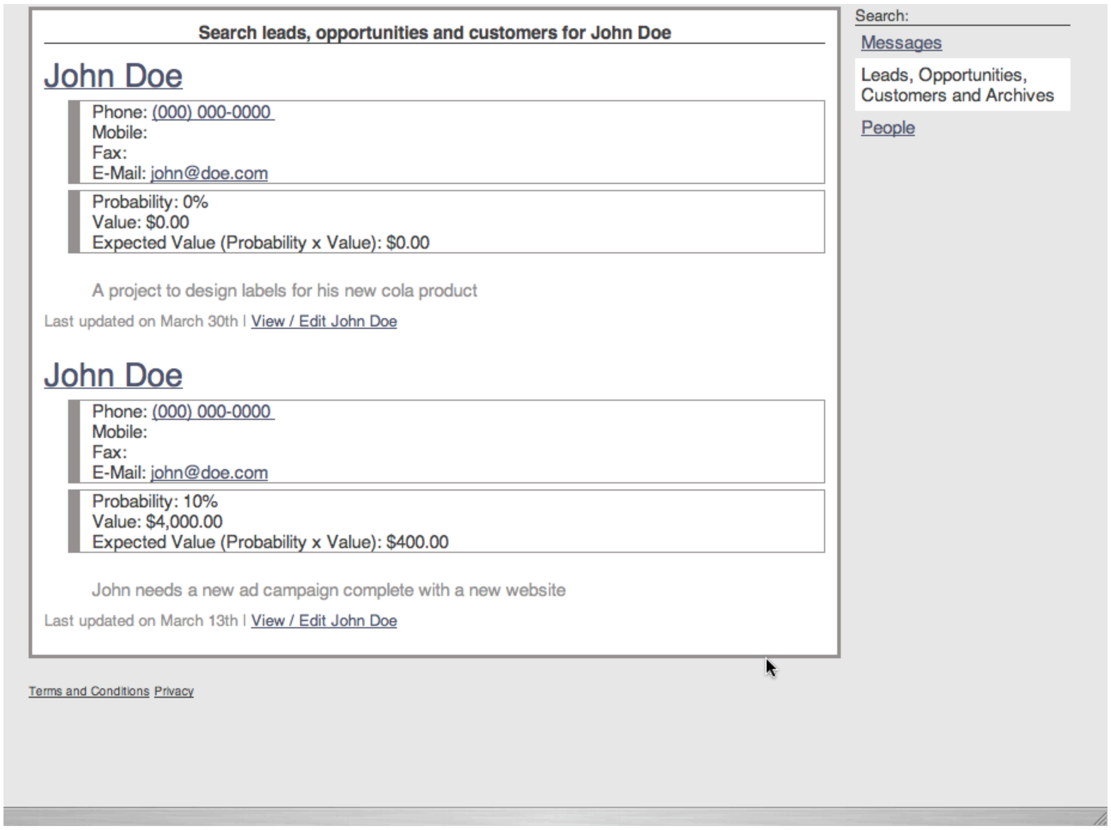
If you haven't read the leads, opportunities, customers and archives section, you should as it discusses the *use* of event templates.

Search

In Heap search is extremely powerful, but misunderstood. Let's start on the opportunity page.



Ok, let's search for "John Doe." Just put "John Doe" in the search box in the top right of the screen and click on the magnifying glass.



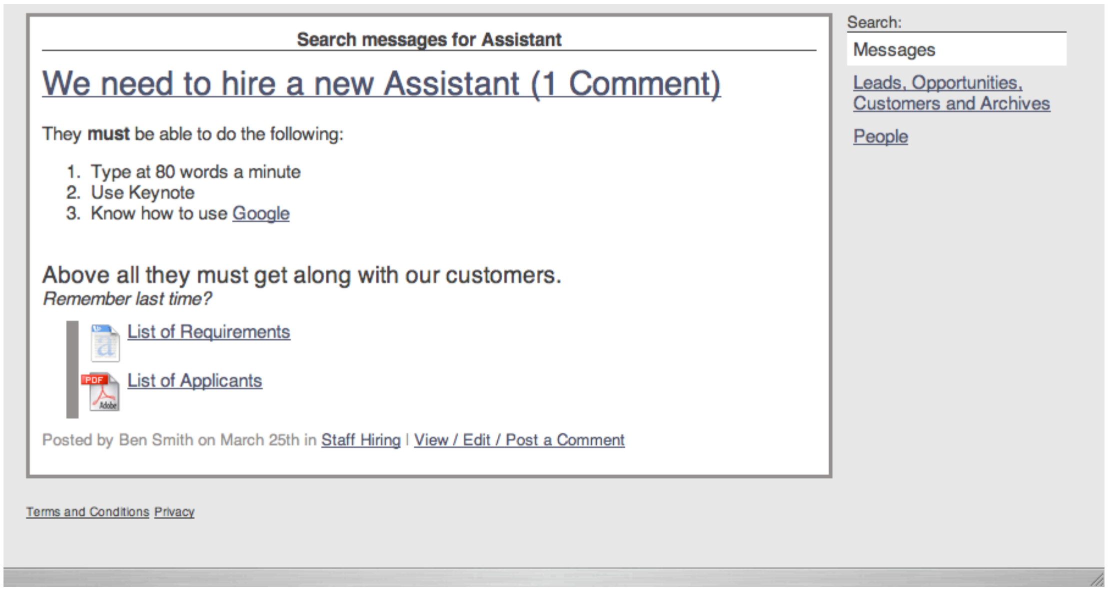
As you can see we get two results. You'll notice that on the right hand side you see a search selector. Right now it's on "Leads, Opportunities, Customers and Archives." Let's see what happens when I select people.

Ok, so we found two results when we searched leads, opportunities, customers and archives, but when we searched people we only found one because both of the items we found are linked to the same person.

Let's take a look at messages.

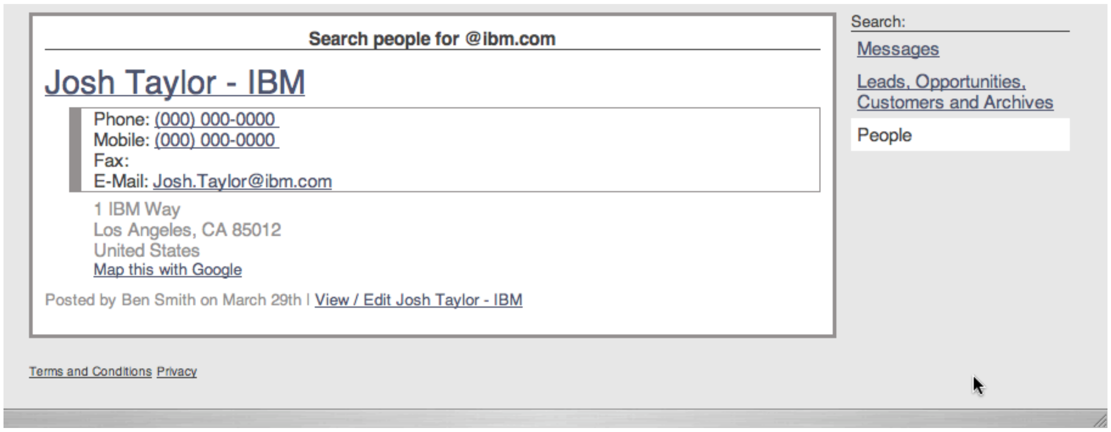
Great! It found the message we created when we uploaded files to John Doe because it is associated to John Doe.

But what if we searched for “Assistant.”

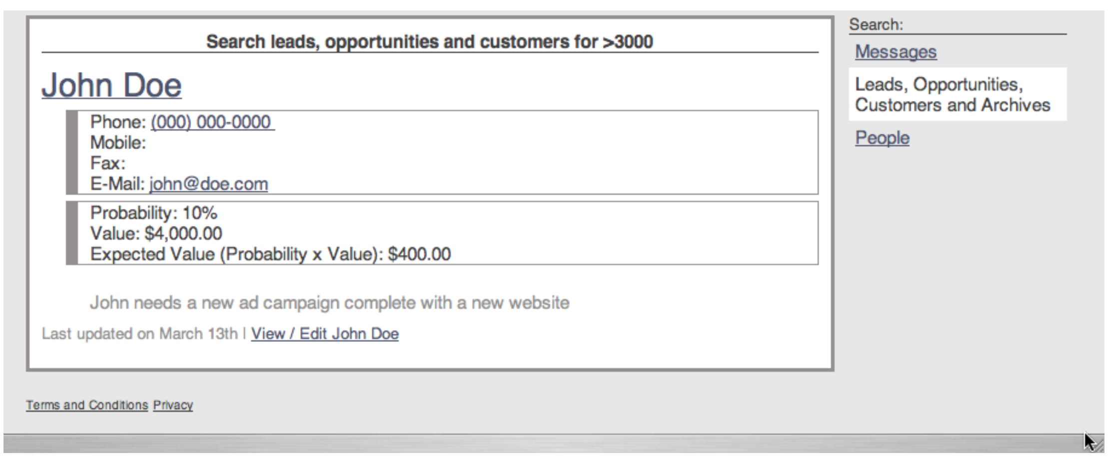


In this case this message was found because the word “Assistant” was in the title (it’s also searching the message).

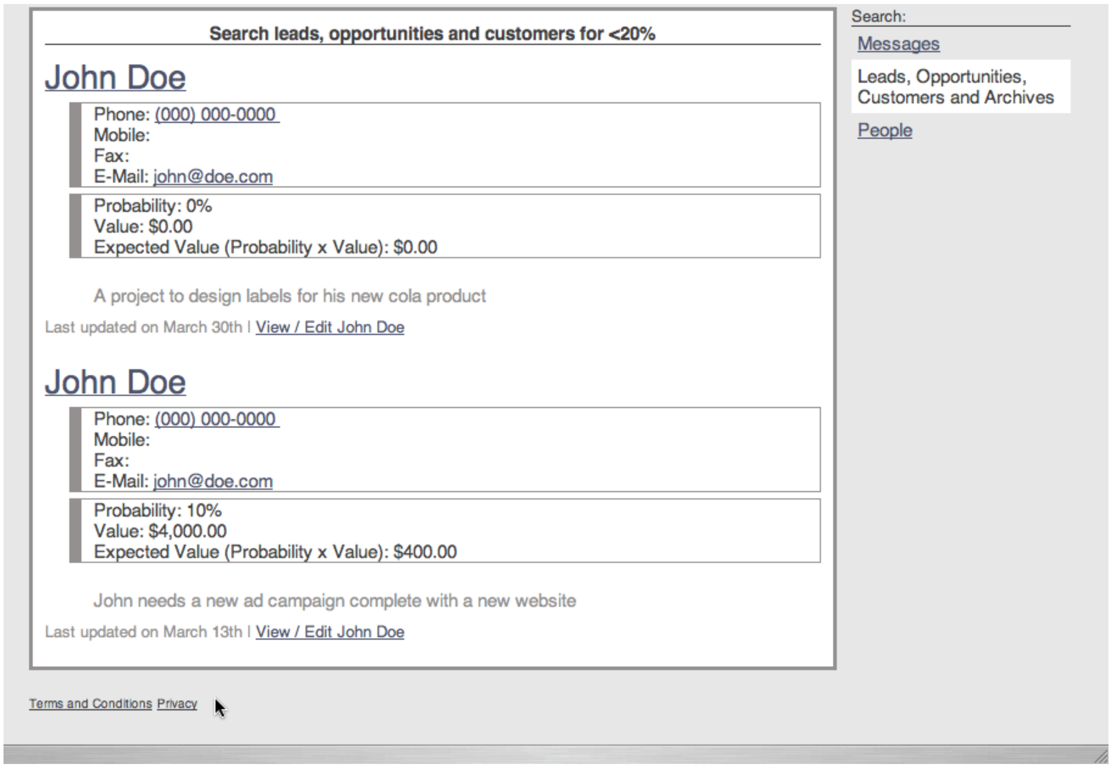
How about any person with an email address at ibm.com?



Ok, how about any lead, opportunity, customer or archive that has a value greater than $3000. Simple, just search for ">3000."



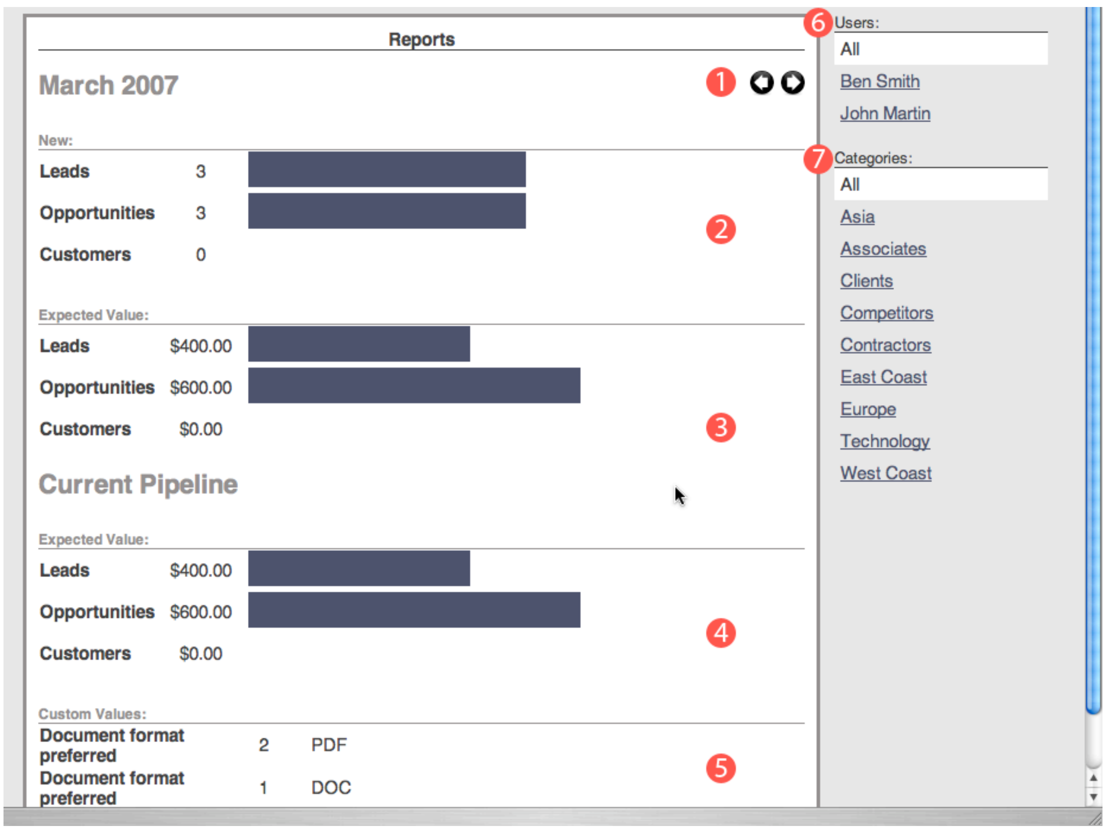
That's it. How about any lead, opportunity, customer or archive that has a probability less than 20%. Just search for "<20%."



To make a long story short: You can search for anything. From parts of phone numbers to zip codes, to a phrase in the more info section, it will just work.

Reports

Let’s create some reports. This area will be fairly unimportant initially. However, over time this will become an important area to help you make business decisions.



1 simply allows you to move from month to month.

2 let’s you see how many new leads, opportunities and customers were created in the current month.

3 is just a different way of looking at item 2. Each lead, opportunity and customer have a probability and value. If you multiply the value by the probability you get the expected value. This is the sum of the expected values of lead, opportunity and customers.

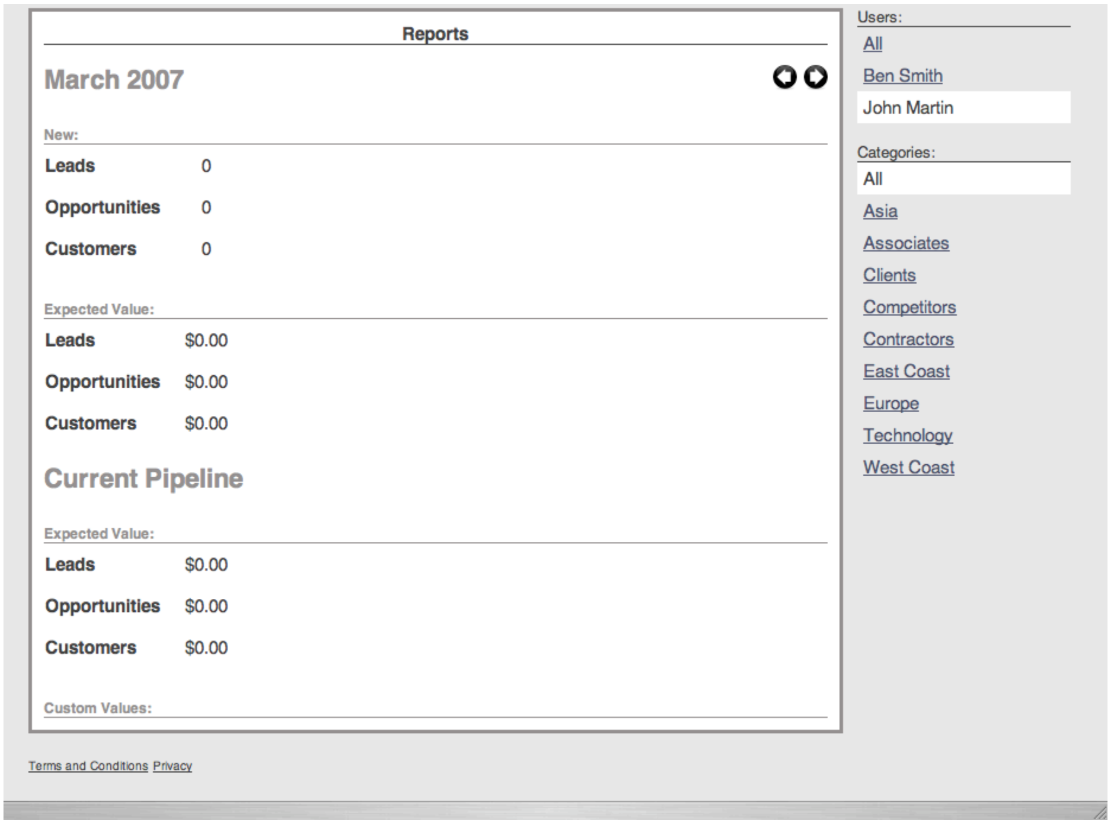
I think some of you might be saying “who cares?” Well, you should because something special happens when you take the sum of the expected values, you get a very accurate picture of expected sales. In essence you are looking at the future revenue that your sales operations in March generated.

4 is the same concept as **3**, however it’s showing the sum of expected values of all leads, opportunities and customers regardless of when they were created.

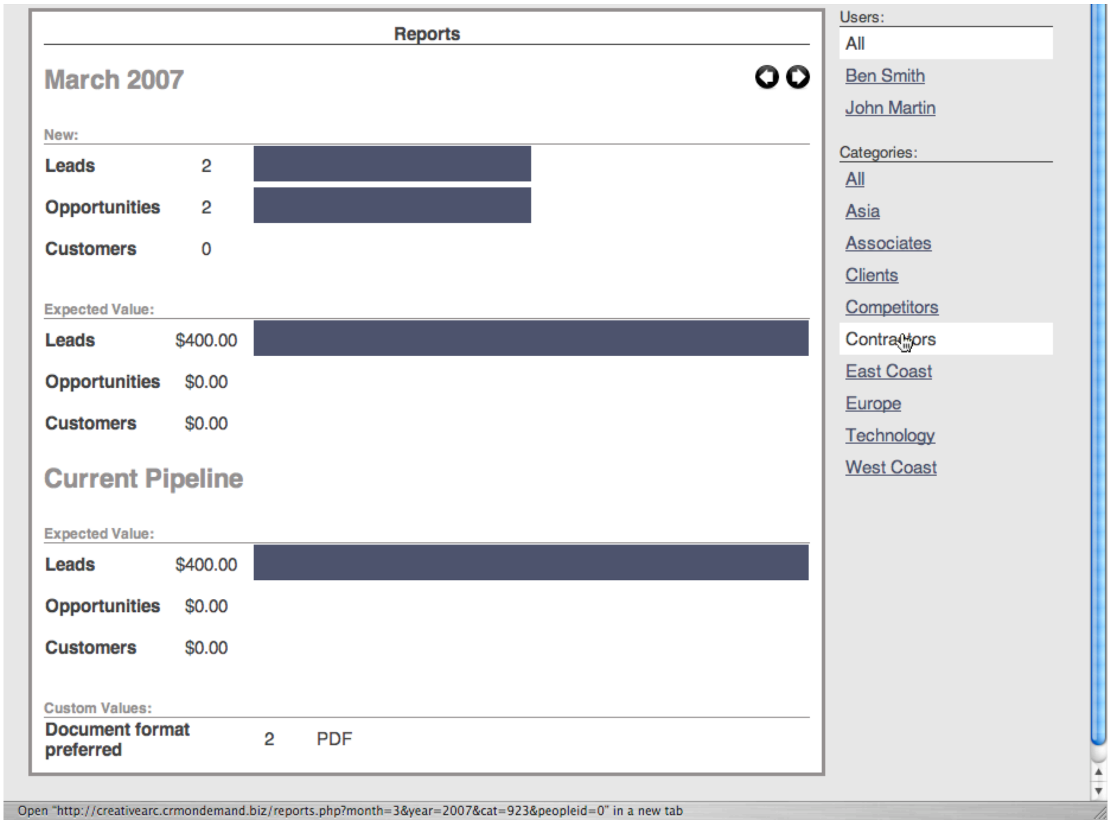
5 is an analysis of custom values. In this case we see that one prospect prefers the “DOC” format, while 2 prefers the “PDF” format. Like item **4**, this area is unaffected by the month, because it is under the “Current Pipeline.”

6 and **7** are filters just like you have seen in virtually every other part of this manual. However, instead of changing the items in the white area, these filters change the items that are being analyzed. Let’s try an example.

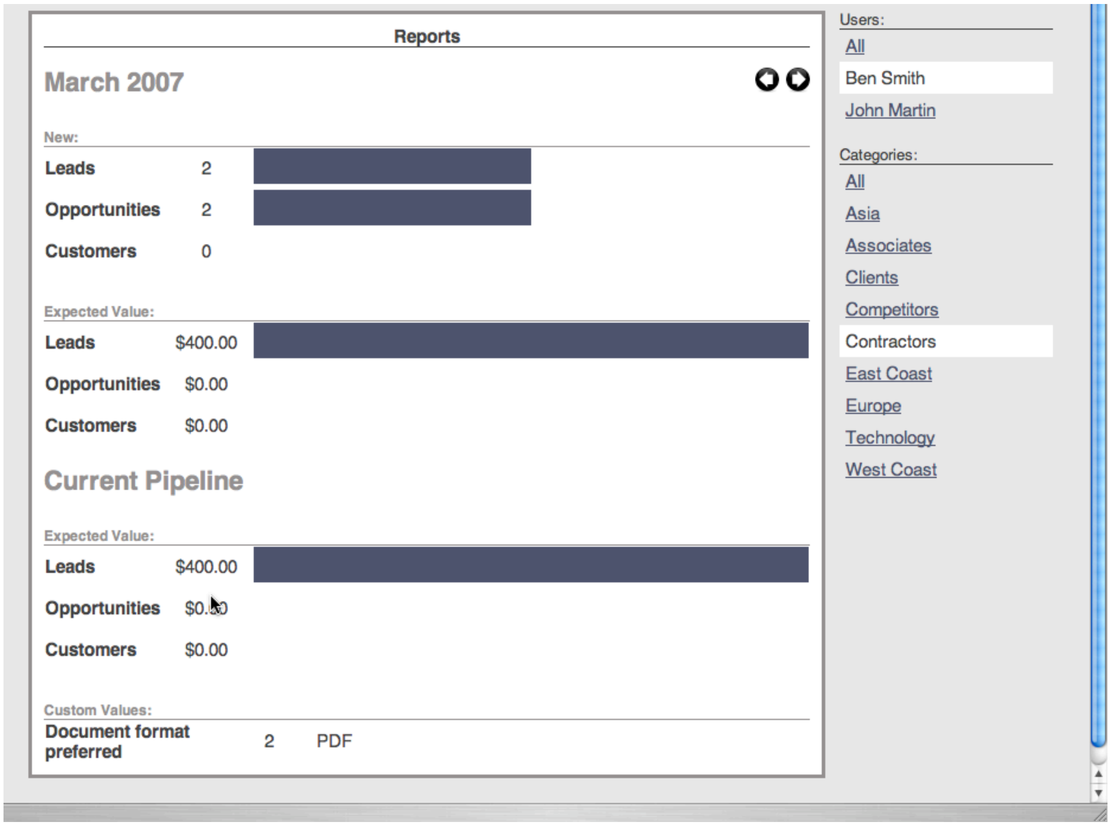
I want to see how the user “John Martin” did in March. So, I’ll select “John Martin” from the users list.



Ok, so John hasn't done anything yet. How about any user, but only show me prospects that are contractors. So, I pick "All" under users and "Contractors" from categories.



And boom, now I know exactly how important contractors are to my business. But I can also combine users and categories. So how did "Ben Smith" do with contractors. Select "Ben Smith" under users and "Contractors" from categories.



E-Mail

With Heap, email can be used to search message, import message, create events, create leads, opportunities, customers and archives. This is such a big subject that we have a separate section covering it here:

http://heap.wbpsystems.com/email/

That's it. If you have any further questions please consult our video selection under "help." If you still don't know the answer email support@wbpsystems.com.

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