Manual for Crm Manager

Login as a Bti User => tools => Crm entries.

Crm Dashboard: Overview of the Tasks for myself and of the Tasks created for other Bti users.

Sales Crm: Create Notes, Interactions and Tasks for certain Customer and Bti users.

- Green Dot => Due Date in the future
- Yellow Dot => Due Date today
- Red Dot => Due Date in the past

Create a note for a Customer:

1. Go to *Crm*.
2. Click on *New Entry*.
3. Choose Note on *Type* dropdown.
4. Choose Tag on *Tag* dropdown.
5. Enter *Customer ID*.
6. Fill in *Text*, and *Contact* information.
7. Click *Save Entry* Button.

Create a interaction for a Customer:

1. Go to *Crm*.
2. Click on *New Entry*.
3. Choose Interaction on *Type* dropdown.
4. Choose Tag on *Tag* dropdown.
5. Choose Interaction Type on *Interaction Type* dropdown.
6. Enter *Customer ID*.
7. Fill in *Text*, *Duration*, and *Contact* information.
8. Click Save *Entry Button*.

Create a Task for a Customer for certain user:

1. Go to *Crm*.
2. Click on *New Entry*.
3. Choose Task on *Type* dropdown.
4. Choose name of sales person on *Assign to* dropdown.
5. Choose Tag on *Tag* dropdown.
6. Enter *Customer ID*.
7. Choose *Due Date* (Due Date must be in the future).
8. Fill in *Text*, and *Contact* information
9. Click *Save Entry* Button.

Create a Task for a Customer for all sales person for this Customer:

1. Go to *Crm*.
2. Click on *New Entry*.
3. Choose Task on *Type* dropdown.
4. let field *Assign to* blank.
5. Choose Tag on *Tag* dropdown.
6. Enter *Customer ID*.
7. Choose *Due Date* (Due Date must be in the future).
8. Fill in *Text*, and *Contact* information
9. Click *Save Entry* Button.

Add Note or Interaction to Task:

1. Go to *Crm*.
2. Click on *Assignee Name*.
3. Click on *+append*.
4. Fill in data.
5. Click *Save Entry* Button.

Change Status of a Task:

To change the status, the Task must have a Note or Interaction attached.

1. Go to *Crm*.
2. Click on *Assignee Name*.
3. Click on *Change Status*.
4. Fill in data.
5. Chosse *Status* (Completed or Close without complete).
6. Click *Save Entry* Button.

To delete a Task, Note or Interaction:

Only the creater of the Task, Note or Interaction can delete the entry. A Task can only be deleted if the Task is Completed or Closed without complete.

1. Go to *Crm*.
2. Click on *Assignee Name*.
3. Click on *delete*.

Note: On the Bti Dashboard after the login as a Bti User, a bar will appear on the top, if a task due date is today or in the past. You can click on *manage* and go directly to the Crm Dashboard.