XRMS User Manual

DRAFT 1

May 18, 2004

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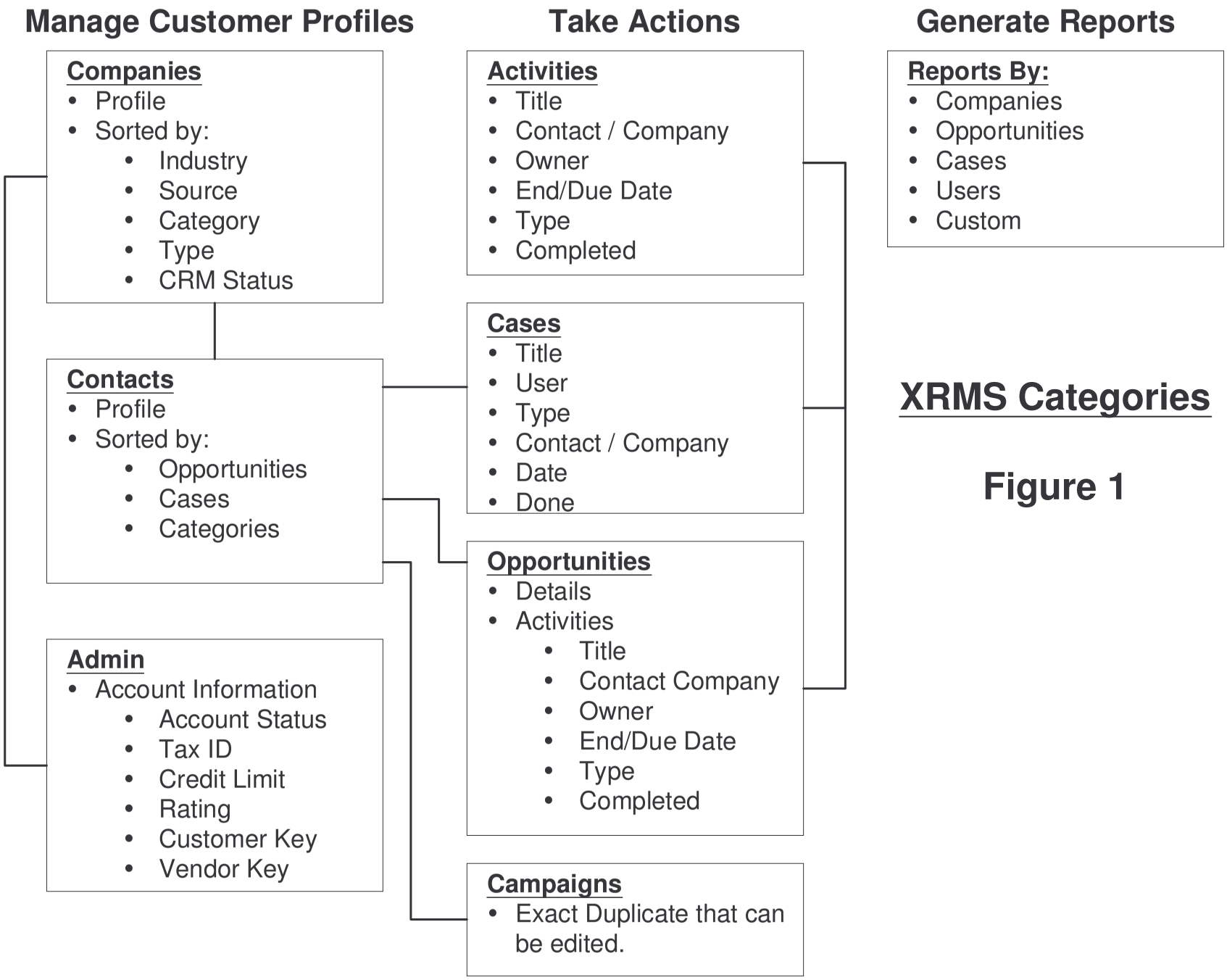
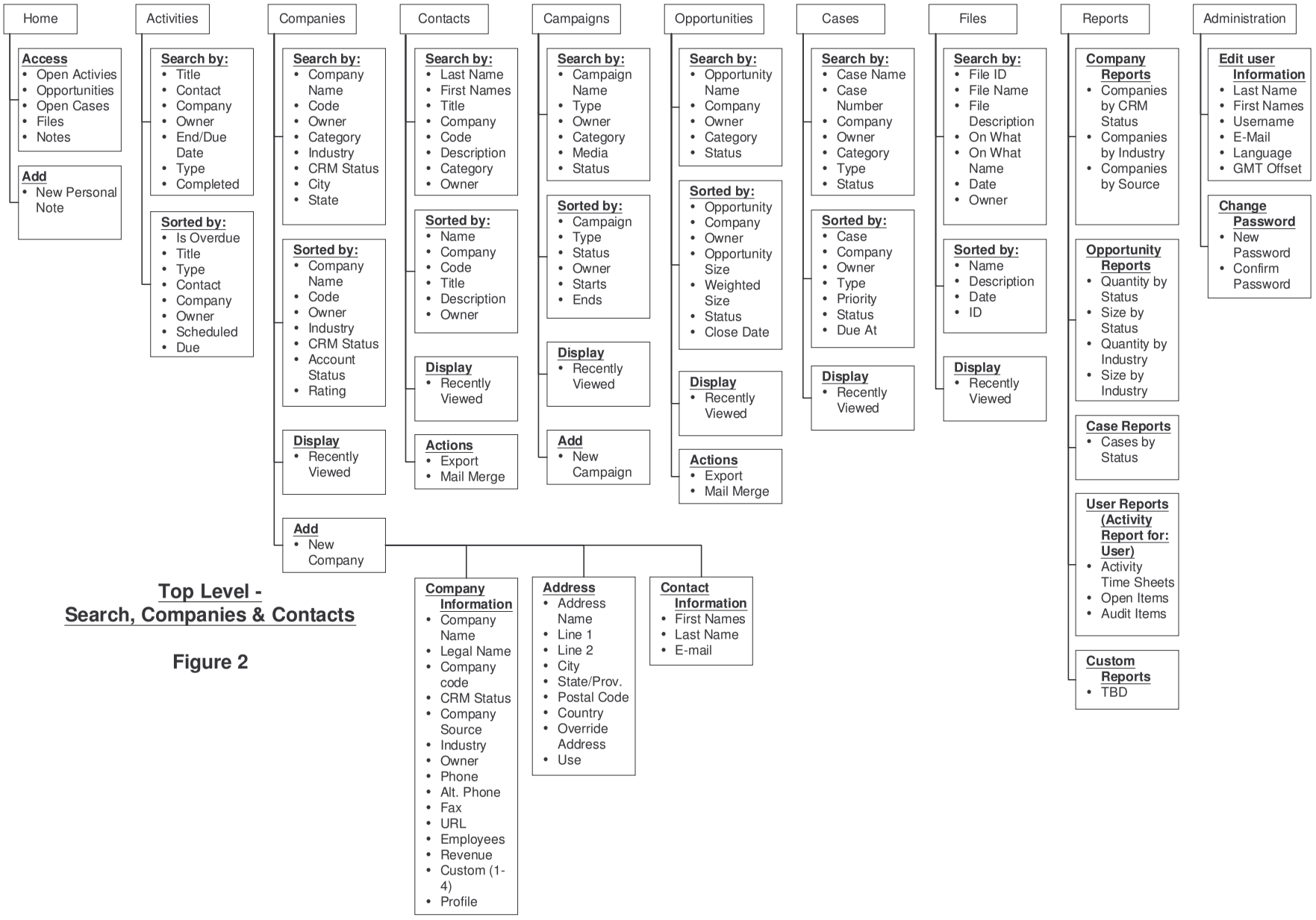
XRMS User Manual - Version Draft 1
May 18, 2004



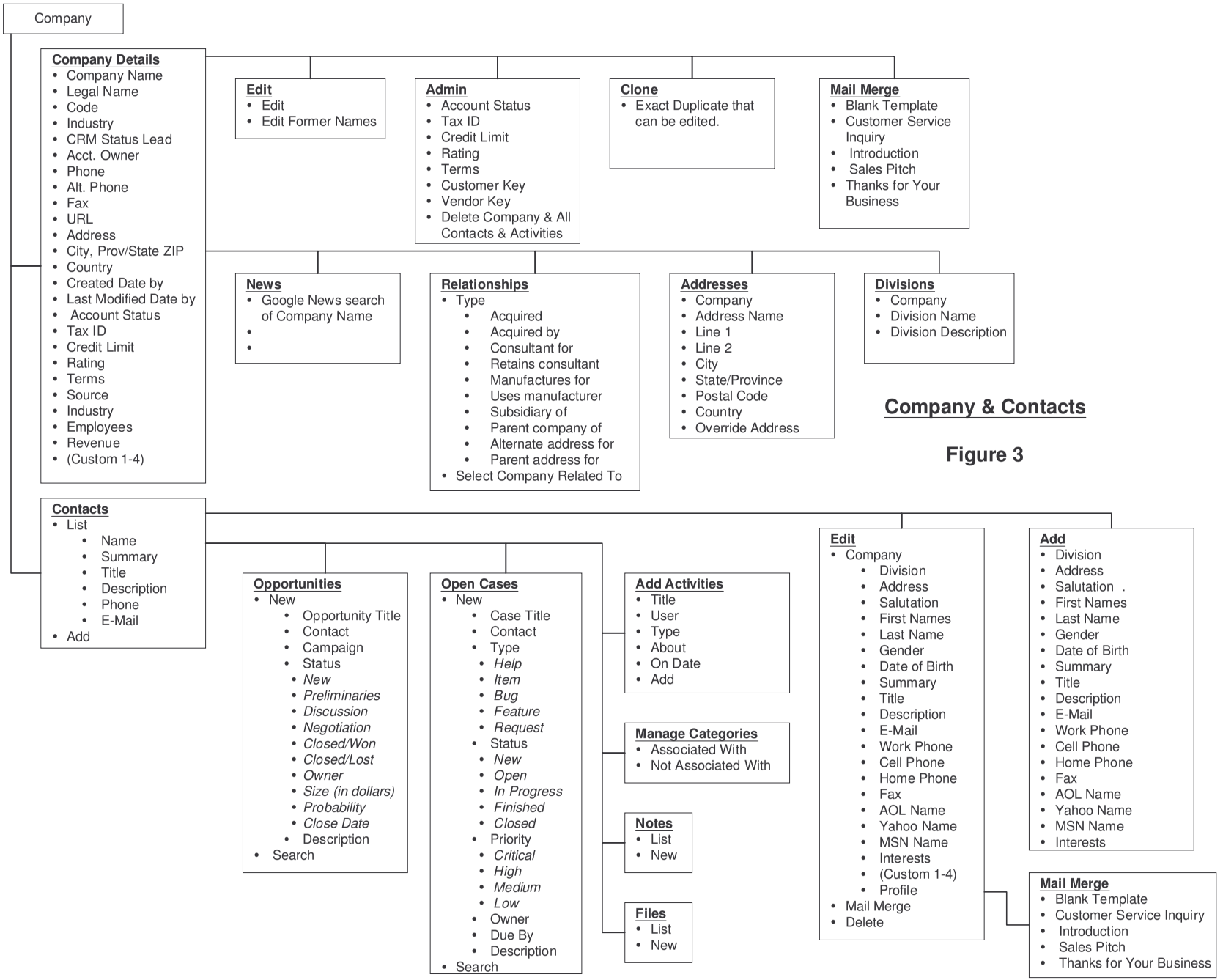
XRMS Categories

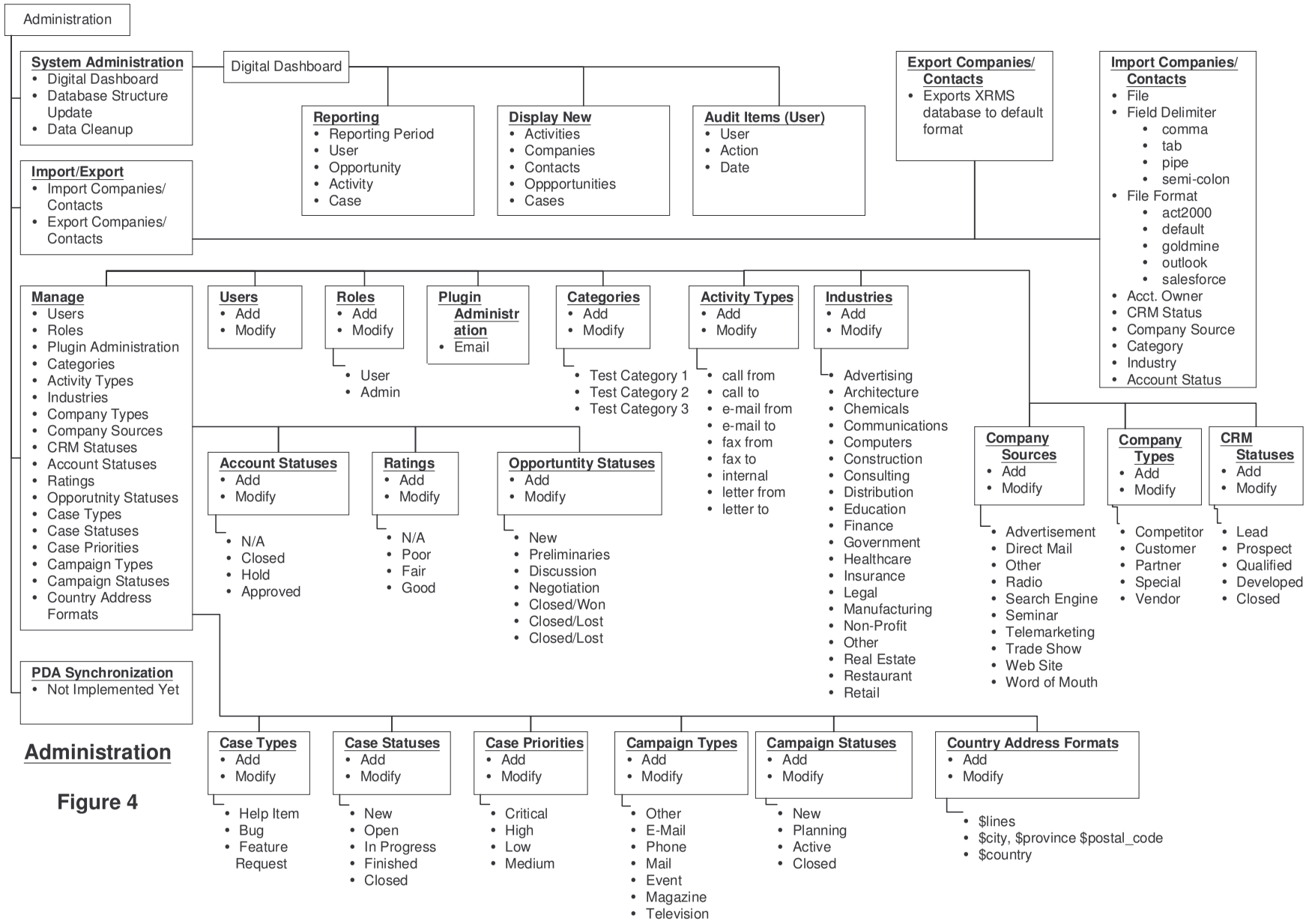
Figure 1



Top Level - Search, Companies & Contacts

Figure 2


Company
Company Details
• Company Name
• Legal Name
• Code
• Industry
• CRM Status Lead
• Acct. Owner
• Phone
• Alt. Phone
• Fax
• URL
• Address
• City, Prov/State ZIP
• Country
• Created Date by
• Last Modified Date by
• Account Status
• Tax ID
• Credit Limit
• Rating
• Terms
• Source
• Industry
• Employees
• Revenue
• (Custom 1-4)
Edit
• Edit
• Edit Former Names
Admin
• Account Status
• Tax ID
• Credit Limit
• Rating
• Terms
• Customer Key
• Vendor Key
• Delete Company & All Contacts & Activities
Clone
• Exact Duplicate that can be edited.
Mail Merge
• Blank Template
• Customer Service Inquiry
• Introduction
• Sales Pitch
• Thanks for Your Business
News
• Google News search of Company Name
•
•
Relationships
• Type
• Acquired
• Acquired by
• Consultant for
• Retains consultant
• Manufactures for
• Uses manufacturer
• Subsidiary of
• Parent company of
• Alternate address for
• Parent address for
• Select Company Related To
Addresses
• Company
• Address Name
• Line 1
• Line 2
• City
• State/Province
• Postal Code
• Country
• Override Address
Divisions
• Company
• Division Name
• Division Description
Company & Contacts
Figure 3
Contacts
• List
• Name
• Summary
• Title
• Description
• Phone
• E-Mail
• Add
Opportunities
• New
• Opportunity Title
• Contact
• Campaign
• Status
• New
• Preliminaries
• Discussion
• Negotiation
• Closed/Won
• Closed/Lost
• Owner
• Size (in dollars)
• Probability
• Close Date
• Description
• Search
Open Cases
• New
• Case Title
• Contact
• Type
• Help
• Item
• Bug
• Feature
• Request
• Status
• New
• Open
• In Progress
• Finished
• Closed
• Priority
• Critical
• High
• Medium
• Low
• Owner
• Due By
• Description
• Search
Add Activities
• Title
• User
• Type
• About
• On Date
• Add
Manage Categories
• Associated With
• Not Associated With
Notes
• List
• New
Files
• List
• New
Edit
• Company
• Division
• Address
• Salutation
• First Names
• Last Name
• Gender
• Date of Birth
• Summary
• Title
• Description
• E-Mail
• Work Phone
• Cell Phone
• Home Phone
• Fax
• AOL Name
• Yahoo Name
• MSN Name
• Interests
• (Custom 1-4)
• Profile
• Mail Merge
• Delete
Add
• Division
• Address
• Salutation .
• First Names
• Last Name
• Gender
• Date of Birth
• Summary
• Title
• Description
• E-Mail
• Work Phone
• Cell Phone
• Home Phone
• Fax
• AOL Name
• Yahoo Name
• MSN Name
• Interests
Mail Merge
• Blank Template
• Customer Service Inquiry
• Introduction
• Sales Pitch
• Thanks for Your Business



Administration

Figure 4