Contents

1 Scope of the User Manual

Educate the users of Sage CRM: SFA Release with the following:

1.1 Overview of the Sage CRM SFA Release.

1. What are the expected Goals
2. Role of Sage CRM
3. Basic Terminology
4. TCL Products, Processes & People

1.2 The Sage CRM Usage:

Detailed Sage CRM Usage Information along with Screenshots, Field Descriptions, Procedures

1. How to Add, Edit & Retrieve Information
2. Handling Leads, Contacts, Communications, Opportunities
3. Scheduling Calls, Meetings, Appointments, Activities, Tasks etc.
4. Using Dashboards for Performance Tracking
5. Working with Lists & Groups
6. Managing Documents
7. Running Reports & Analyzing Sales Data
8. Integration & Synchronization of Sage CRM with MS Outlook
9. Customizing the System According to Your Preferences

Important Note:

The screens shown in the user guide may differ from user to user depending on his profile, LOB, Product Family, his own user preferences. Major functional differences between these screens are highlighted within this user guide.

2 Overview: Sales Force Automation through Sage CRM

2.1 The Dream Sales Force:

- An Effective & Successful Sales Team consists of:
  - **<u>Sales Persons</u>**, who:
    - Acquire new customers & increase market share of the Organization
    - Cross sell to existing customers
    - Help the Organization in maintaining deep win-win relationships with the customers
    - Communicating in the respectful, precise & on-time manner
    - Have deep knowledge of features & benefits of own as well as competitor products
    - Deliver on their promises
    - Providing accurate, precise & up-to-date information to various departments of the organization.

  - **<u>Sales Managers / Coordinators</u>**, who:
    - Effectively distribute, manage & track the sales tasks amongst sales team
    - Analyze the sales data periodically to arrive at important decisions
    - Optimize the sales processes throughout the sales-cycle of Prospect-Lead-Contact-Opportunity-Customer.
    - Achieve the ultimate organization goal of improving the sales figures

2.2 Role of Sage CRM

Dream Sales Force	=	**Sales Skills of the Sales Force**	+	**Reliable, Real Time, Uniform Information System**

- SageCRM SFA, will free off the TCL sales force from worries like Organizing / Analyzing / Tracking the Sales Data

&

<u>Help them concentrate on their main task:</u>

<u>Which is : “Selling”</u>

- Support the TCL Sales Force for following Tasks:
  - Easy, Quick & Reliable Access to Sales related information such as Leads, Opportunities, Communications etc.
  - Maintaining the sales data in an Organized & informative format
  - Analyzing & Reporting to Support Decision Making
  - Tracking & Controlling the Sales Activities & Processes

2.3 Basic Terminology:

2.3.1 Prospect:

It is a Person / Organization belonging to a particular market segment. Prospect is not part of Sage CRM SFA Release.

2.3.2 Lead:

Prospect that may be interested in any of our products is a Lead.

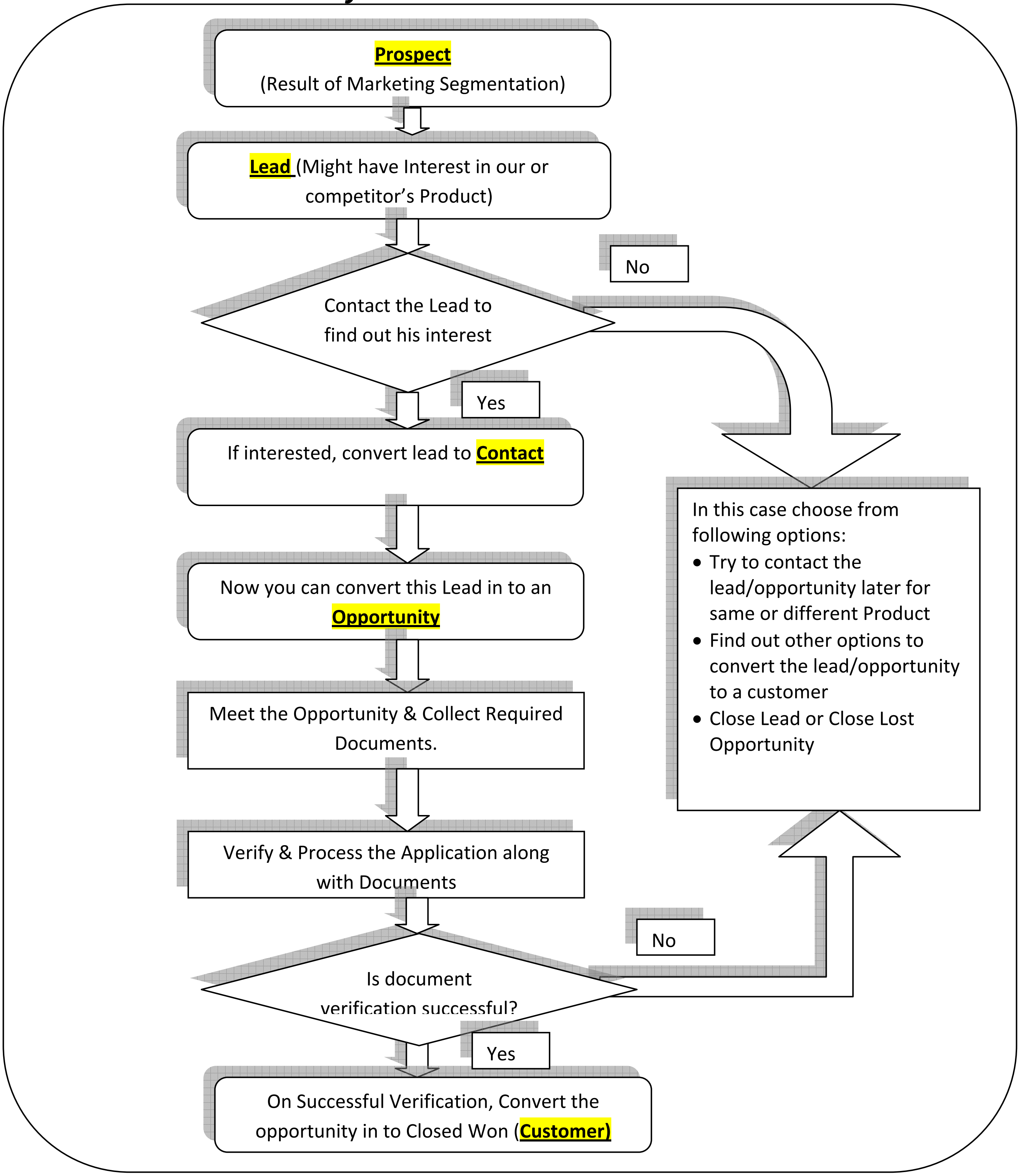
2.3.3 Contact:

- Contact is a person/organization related to our organization. It can be anyone like a partner, customer, colleague, vendor, supplier, distributor, DSA etc.
- It must be noted that, a lead must be converted to a contact before we can convert it in to an opportunity.
- Contact is not related to any specific product. It is pure contact information.
- Whereas leads & opportunities are related to specific products.

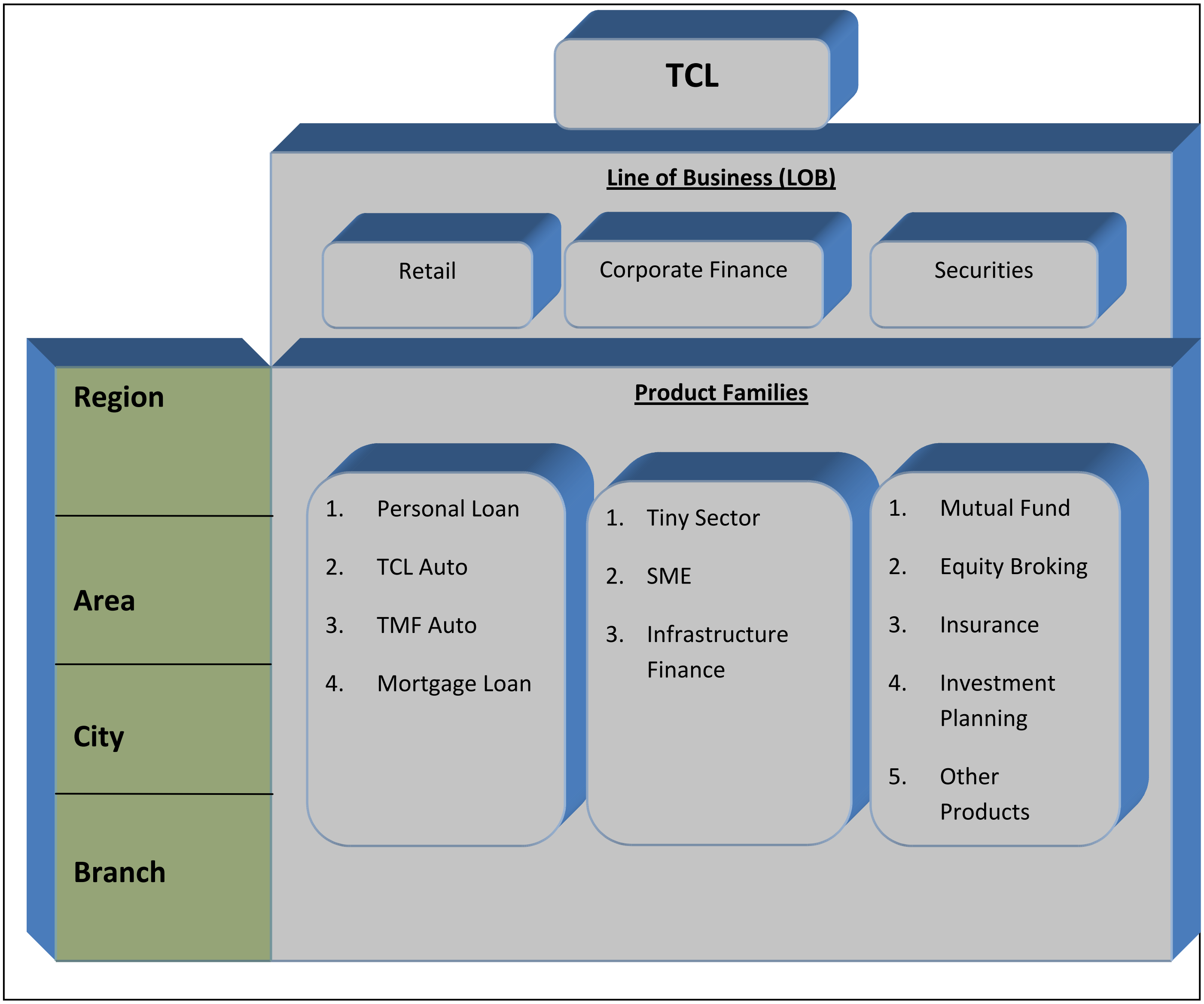
2.3.4 Opportunity:

- Opportunity is a Lead which has
    - Interest in our product
    - Intent to buy our/competitor's product within a definite time frame

2.4 A Basic Sales Cycle:



2.5 TCL: Organization Structure (for SFA Release Phase 1.1)



1. In Sage CRM an end users will follow the territory structure in the following manner:

- LOB
  - Product Family
    - Region
      - Area
        - City
          - Branch 1
          - Branch 2

For Example Mr. Rohit could be a Sales Executive

- Working at
  - o Dadar Branch
  - o In Mumbai City,
  - o In Maharashtra Area
  - o And in Western Region.
- He may be selling
  - o Product: Education Loans
  - o In Product Family: the Personal Loan
  - o Belonging to Retail LOB

2. Individual User can be mapped to multiple territories.
   For Example:
   - o Mr.Sandip could be the LOB Head for Retail LOB.
   - o He will belong to all the territories that come under Retail LOB.
   - o Hence he **may** have access to various territories coming under his LOB
   - o The type of access can be configured by the Sage CRM system administrator

3 Getting Started

FAQs
Show me how to:

- Get to the logon page.
- Log on.
- Log off.
- Change my password.
- Reset my password if I have forgotten it.
- Edit my account details.
- Upload a corporate logo.
- Find my way around the different screen areas.
- Know what information is stored where.
- Find my own work space.
- Use mouse and keyboard navigation.
- Use on-screen coaching.
- Access training materials and setup wizards.

3.1 Starting the Logon Page

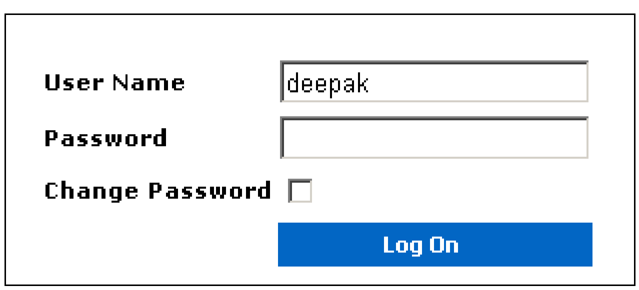
To reach the logon page:

- Open your Web browser. If you do not have a Web browser, please consult your System Administrator.
- Enter the URL given to you by your System Administrator.

3.2 Logging On

To log on:

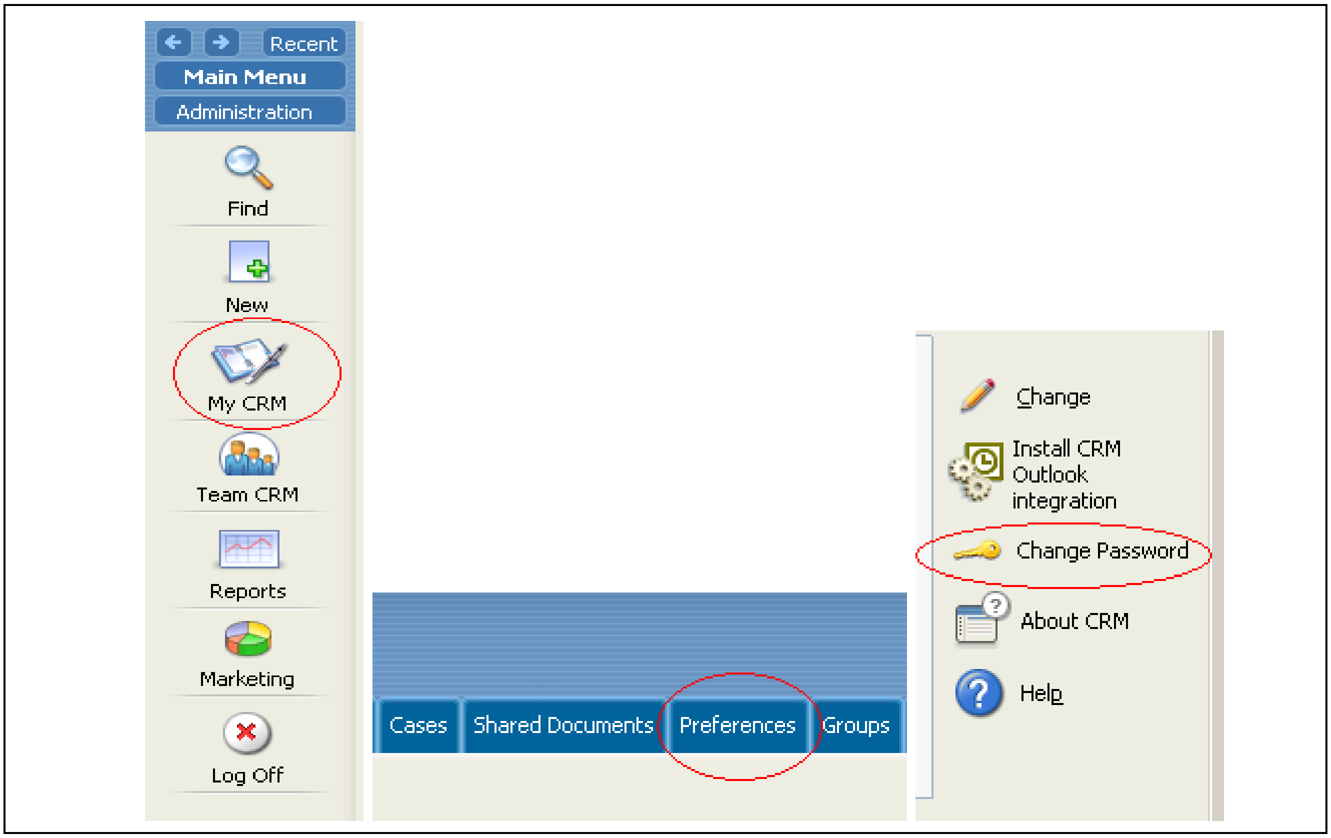
- From the Log On area of the Web page given to you by your System Administration, type in your **User Name** in the **User Name** field and your password in the **Password** field.
- Click on the **Log On** button.
- Depending on your system configuration and user preference settings, a successful logon displays an area within My CRM, for example, your weekly diary.



3.3 Changing Your Password

To change your password once you have logged on:

- Select **My CRM** | **Preferences**, and click on the **Change Password** action button.
- Then from the Change Password screen, type your old password in the **Old Password** field and type the new one in the **New Password** and **Confirm Password** fields.
- Once you do this select **Save**.



3.4 Resetting Your Password

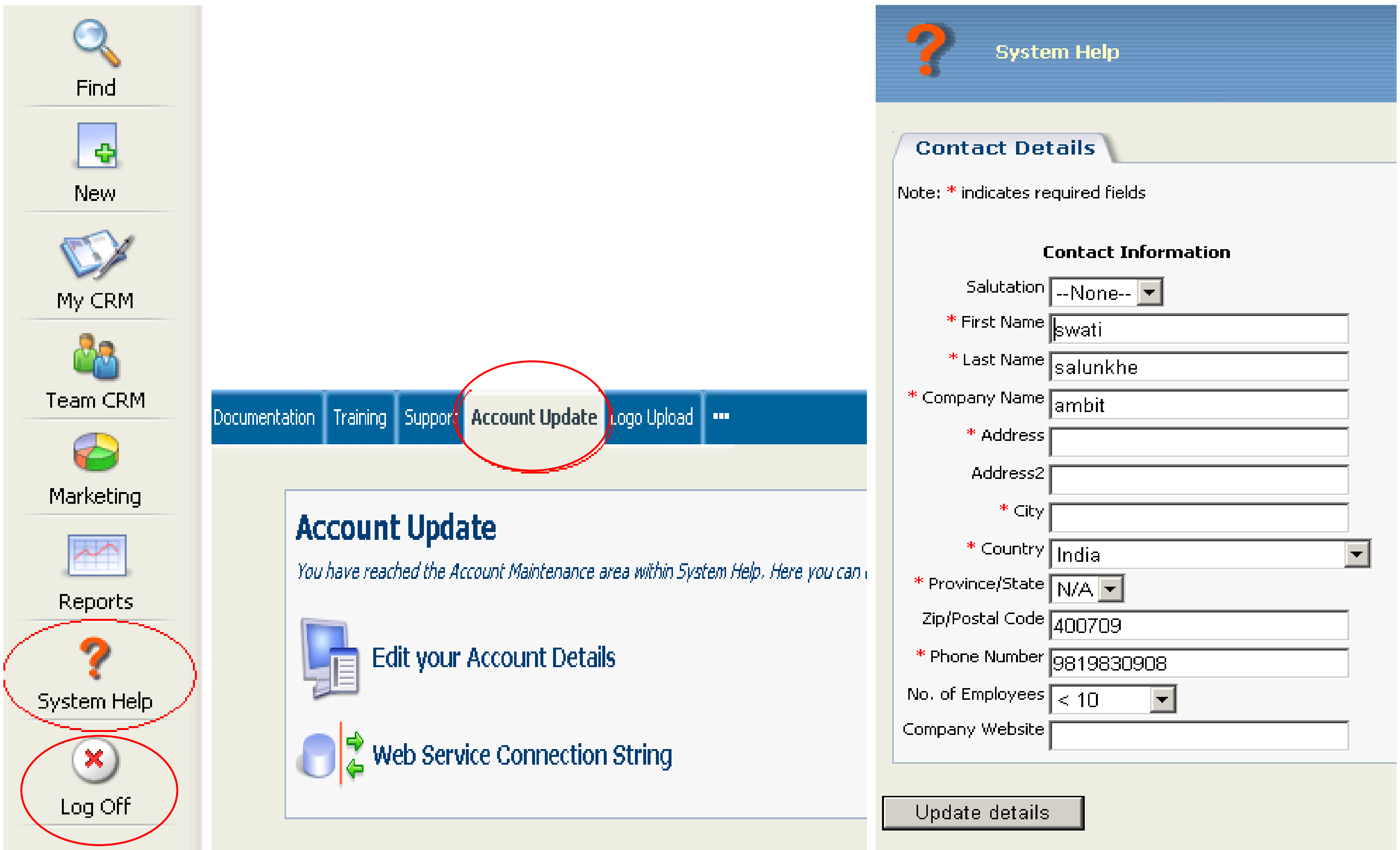
If you forget your password when logging in.

- From the Log On area of the web page, select the **Forgot Password** link. Then enter your e-mail address and click on the **Request Password** button. A message is displayed to inform you that your request is being processed.
- Shortly after this, you will receive an e-mail from your service provider. Open the e-mail and select the **Click Here To Request Password** link.
- You are automatically directed to the Change Password page.
- Specify your new password and select the **Submit** button. Your password is changed.

3.5 Editing Your Account Details

To edit your account details:

- Select **System Help** | **Account Update**, and click on the **Edit Your Account Details** button.
- You can make changes to your account details on the Contact Details page. When you have finished, click on the **Update Details** button.



3.6 Logging Off

To log off:

- Click on the **Log Off** button.
- You are automatically logged off if you close the browser or navigate to another site within the same browser window.

3.7 Basic Screen Elements

The basic screen elements in CRM are:

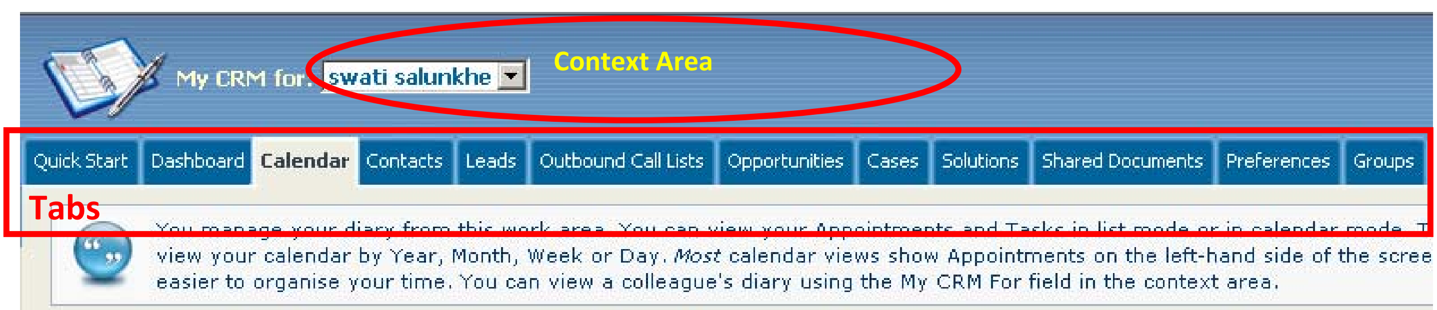
1. Context Area
2. Tabs
3. Panel
4. Hypertext Links
5. Action Buttons
6. Menu Buttons
7. Menu Button Pop Out Lists
8. Recent List
9. Forward and Back Buttons

3.7.1 Context Area

- The Context Area displays a summary of the information you are currently focused on. For example, when you are in the context of a person, all the information displayed in the Tabs and Panels below the context area relates to this person.
- You can quickly move from the context area of a person to the company they work for, by clicking on the Company link within the context area.

3.7.2 Tabs

- Tabs are like folder dividers. The information found in each folder section is determined by the current context.
- For example, if the person "Anita Patel" is zoomed in on in the context area, selecting the Quick Look Tab displays the most recent interactions your company has had with Ms. Chapman.



3.7.3 Panel

- Panels display information on, for example, the person in the current context.
- One page of information can be divided into a number of panels.
- Each panel groups related information for easier viewing.

3.7.4 Hypertext Links

- Hypertext links allow you to jump from one page to another.
- For example, when you click on a company name, the Summary page associated with that company is displayed in the work area.
- All e-mail and Web site addresses are hyperlinked.
- You can click on an e-mail address to send an e-mail straight away, or on a Web site address to navigate to the Web site.

3.7.5 Action Buttons

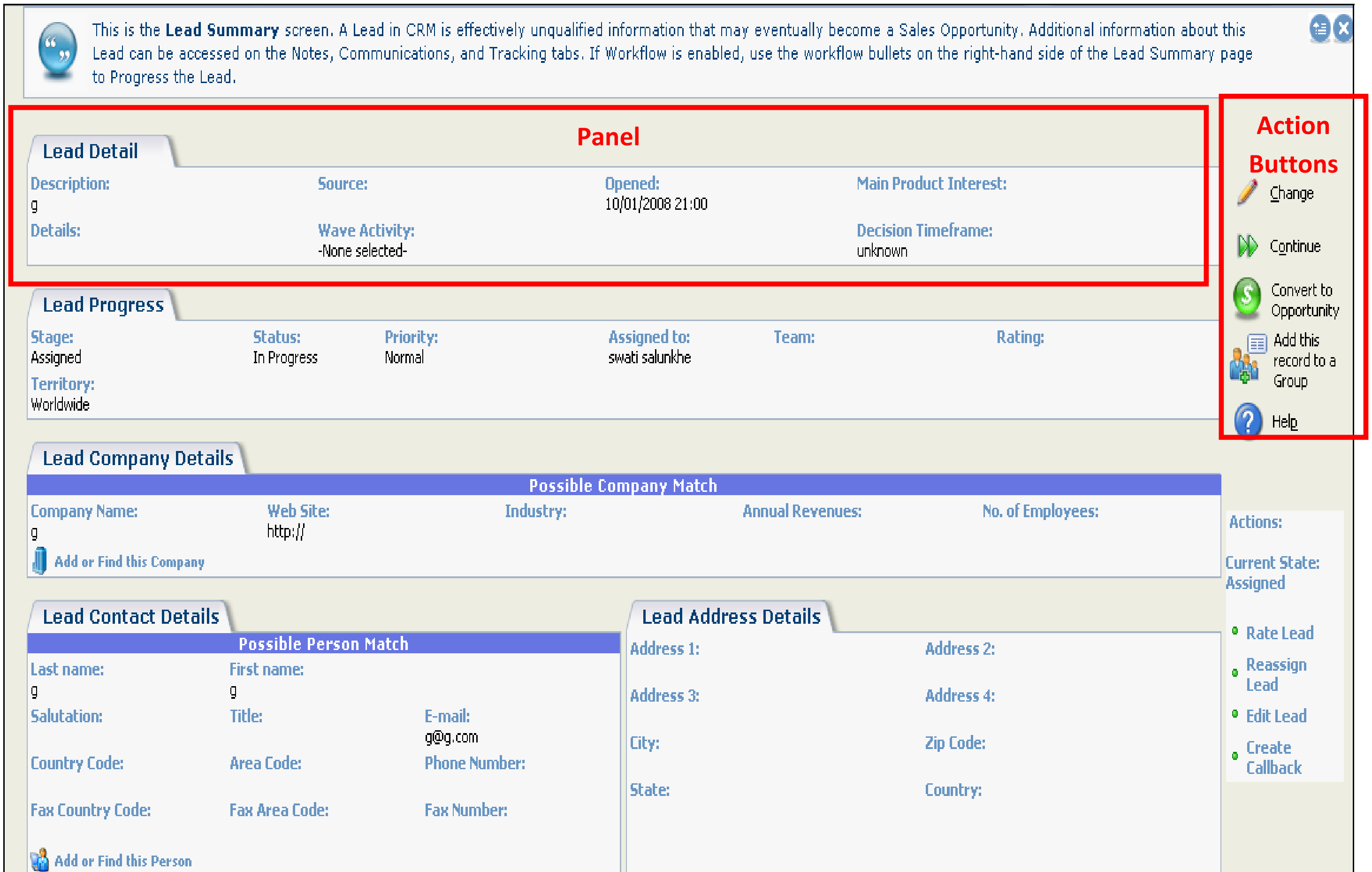
- As you work with the system you will certainly need to change the data, for example, add new addresses, alter contact information, or progress sales opportunities.
- Action buttons on the right-hand of the screen let you work with data.
- The Action buttons available change depending on the context you are in.

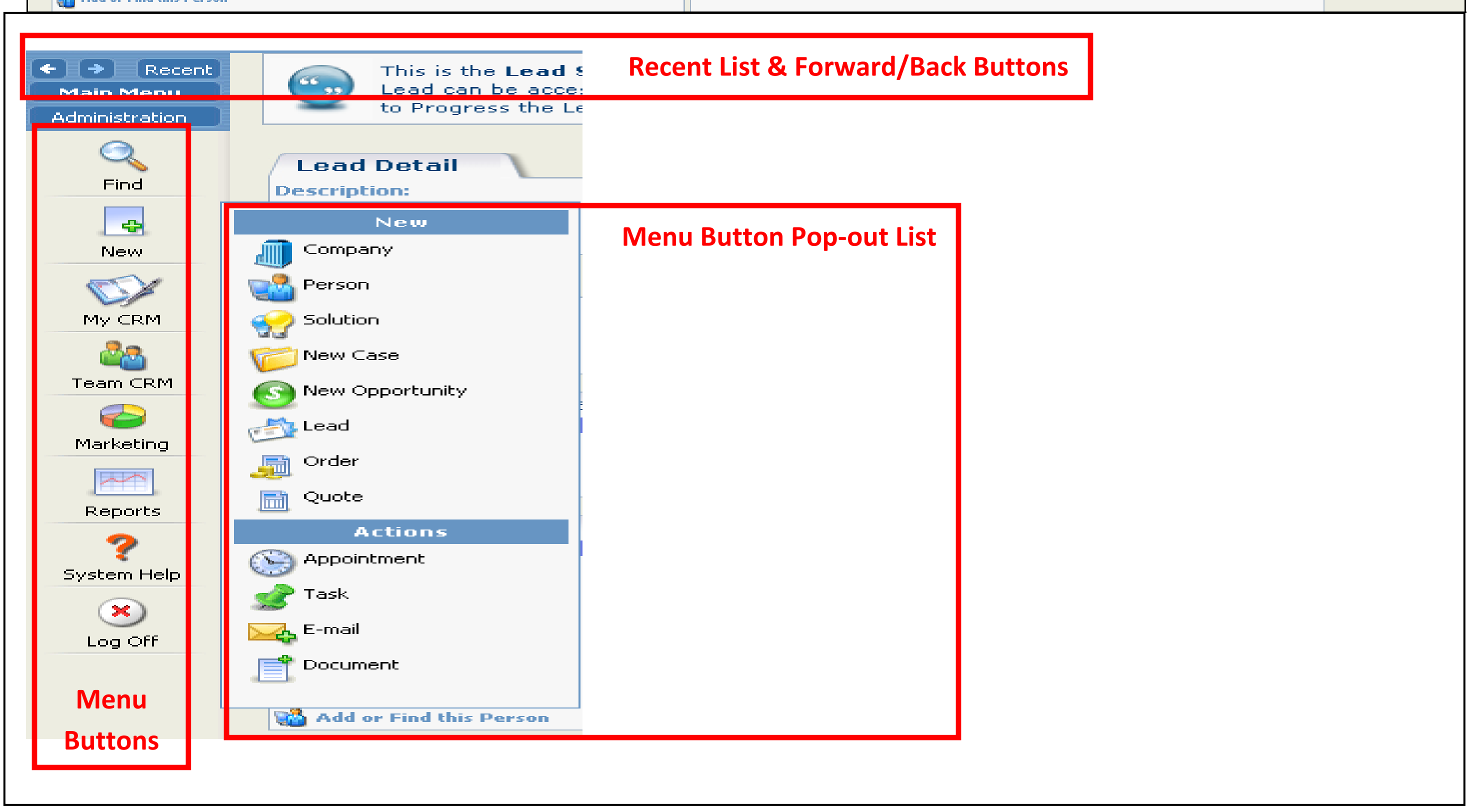
3.7.6 Menu Buttons

- You can move directly from one work area to another with the Menu buttons on the left-hand side of your screen. The Menu buttons available to you remain the same regardless of the company or person or any other context you are working in.
- Click on **Find** to search for a company, person, case, opportunity, lead, quote, order, communication, solution, or to perform an advanced find.
- Click on **New** to create a new company, person, solution, case, opportunity, lead, quote, order, appointment, task, e-mail, or document.
- Click on **My CRM** to display a series of tabs with information relating to you work in progress.
- Click on **Team CRM** to view your team's activities.
- Click on **Marketing** to set up new marketing campaigns and create target lists.
- Click on **System Help** to view system documentation, video training, and technical support details.
- Click on **Reports** to run reports on Prospect / Lead / Opportunity information.
- Click on **Log Off** to exit the system.
- The number of menu buttons you can see is set up by your System Administrator in your user profile.

3.7.7 Menu Button Pop Out Lists

- Right-clicking or hovering over the menu buttons gives you access to shortcut pop out lists accessible from anywhere in the system.


This is the Lead Summary screen. A Lead in CRM is effectively unqualified information that may eventually become a Sales Opportunity. Additional information about this Lead can be accessed on the Notes, Communications, and Tracking tabs. If Workflow is enabled, use the workflow bullets on the right-hand side of the Lead Summary page to Progress the Lead.
Panel
Action Buttons
Lead Detail
Description: g
Source:
Opened: 10/01/2008 21:00
Main Product Interest:
Details:
Wave Activity: -None selected-
Decision Timeframe: unknown
Change
Continue
Convert to Opportunity
Add this record to a Group
Help
Lead Progress
Stage: Assigned
Status: In Progress
Priority: Normal
Assigned to: swati salunkhe
Team:
Rating:
Territory: Worldwide
Lead Company Details
Possible Company Match
Company Name: g
Web Site: http://
Industry:
Annual Revenues:
No. of Employees:
Add or Find this Company
Actions:
Current State: Assigned
Rate Lead
Reassign Lead
Edit Lead
Create Callback
Lead Contact Details
Possible Person Match
Last name: g
First name: g
Salutation:
Title:
E-mail: g@g.com
Country Code:
Area Code:
Phone Number:
Fax Country Code:
Fax Area Code:
Fax Number:
Add or Find this Person
Lead Address Details
Address 1:
Address 2:
Address 3:
Address 4:
City:
Zip Code:
State:
Country:


Recent List & Forward/Back Buttons
Recent
Main Menu
Administration
Find
New
My CRM
Team CRM
Marketing
Reports
System Help
Log Off
Menu Buttons
Lead Detail
Description:
Menu Button Pop-out List
New
Company
Person
Solution
New Case
New Opportunity
Lead
Order
Quote
Actions
Appointment
Task
E-mail
Document
Add or Find this Person

3.7.8 Recent List

- The Recent List can be viewed on the top left-hand corner of your screen. It allows you to quickly select and return to the company, person, opportunity, quote, order, lead, case, or solution you were most recently dealing with.
- The Recent List can be activated by clicking on or hovering over the Recent button. You can define how you want to activate the list from the Preferences tab in My CRM.
- As well as returning to a specific opportunity, case, company or person, selecting one of the recent list heading icons returns you to the corresponding find page. For example, selecting the Person heading icon, displays the person Find page.
- Selecting Clear, clears the list.

3.7.9 Forward and Back Buttons

- The Forward and Back buttons take you one step back or one step forward from your current position in the system.
- Use these arrows instead of the Forward and Back buttons in your browser to give you a complete picture of your previous or next screen.

3.8 Tabs

- Tabs are like folder dividers. The information found in each folder section is determined by the current context. For example, if the person "Anita Chapman" is zoomed in on in the context area, selecting the Quick Look Tab displays the most recent interactions your company has had with Ms. Chapman.

3.8.1 Company Tabs

- This section discusses each tab within the context of a company. The purpose of this is to give you an overview of the different types of information held in the system, and how they fit together.
- The **Summary** tab shows the core company details, the phone and e-mail, principal address, and contact.
- If you want to know your recent history with this company at a glance, click on the **Quick Look** tab. It lists the most recent communications, sales, and customer service cases linked to the company.
- The **Dashboard** tab within the Company context can be used to display a management overview of the status of a Prospect / Lead / Opportunity account. For example, a chart of overdue cases, a list of high priority opportunities, or a snapshot of upcoming meetings.
- If **Key Attribute Profiling** has been set up for Companies, you can use the Key Attributes tab to record additional information about the company that is not provided for by the standard Company fields.
- The **Marketing** tab can be fully customized to your needs to track information, such as detailed company segmentation information.
- You can add general free text information on the company under the **Notes** tab. For example, a recent press release indicates the company is due to merge with another company. This information can be added to the Company Notes.
- The **Communications** tab shows all the phone calls, meetings, and day-to-day correspondence with this company.
- The **Opportunities** tab shows your sales pipeline, past and planned, for this company.
- If you want to see how good your customer support has been, click on the **Cases** tab.
- The **People** tab shows all of the people who you have contact with at the company.
- The **Addresses** tab shows all the addresses linked to this company.
- The **Phone/E-mail** tab shows the different phone and e-mail details for the company.
- The **Company Team** tab shows all the people from your organization who are involved in activities with this company.
- The **Documents** tab shows references to all documents related to this company.
- The **...** (Ellipses) icon at the end of a row of tabs enables you to change the default tabs you see in different areas of the system. For example, if you rarely work with Opportunities, you can remove this tab from the Company tabs.
- However, you can easily enable it again if you change your mind.
- The tabs available within the context of a Person are similar to those described above, however the information relates specifically to the person.

3.8.2 My CRM Tabs

- This section discusses each tab within the context of the My CRM area. The My CRM tabs show work in progress specific to you. You can also set up your own system preferences from the My CRM tabs.
- The **Quick Start** tab provides access to training videos, the User Preferences Wizard, quick tips, and system documentation. For example, you could define your system settings using the User Preferences Wizard.
- The **Dashboard** tab shows a customizable set of content relating to you. For example, a list of your most recently viewed companies.
- The **Calendar** tab shows all of your planned phone calls, meetings, and day-to-day correspondence.
- The **Contacts** tab allows you to specify contacts in CRM that you want to synchronize with MS Outlook.
- The **Leads** tab displays a list of unqualified queries about your business.
- The **Outbound Call Lists** tab displays a list of all Outbound call lists that you are working on. This tab is not displayed by default. It can be enabled from the Preferences tab.
- The **Opportunities** tab shows your current sales pipeline.
- The **Forecasts** tab displays a list of your quarterly sales forecasts. This tab is not displayed by default. The System
- Administrator gives you access to this tab.
- If you want to see a list of open customer service cases assigned to you, click on the **Cases** tab.
- The **Solutions** tab shows a listing of knowledge base items. This tab is not displayed by default. It can be enabled from the Preferences tab, if your System Administrator has given you the rights to access Solutions.
- The **Shared Documents** tab stores corporate documents that you may need quick access to on a daily basis.
- The **Preferences** tab allows you to define system settings specific to your requirements, for example, your time zone, preferred currency, or first page displayed when you log on.
- The **Groups** tab allows you to create and manage groups. Groups functionality allows you to create, modify, and save lists of people, companies, leads, cases, and opportunities.
- The **...** (Ellipses) icon at the end of a row of tabs enables you to change the default tabs you see in different areas of the system. For example, if you rarely work with Opportunities, you can remove this tab from your My CRM work area.
- However, you can easily enable it again if you change your mind.
- The tabs available within the context of your Team CRM are similar to those described above, however the information relates to your Team. There are no Forecasts, Outbound Calls, Preferences, Contacts, or Dashboard tabs within Team CRM.

3.9 Navigating

- World Wide Web navigation is dominated by simple, intuitive "point and click" hyperlinks, which move you from one Web page to the next.
- In addition to point-and-click, the following keystrokes and buttons can speed up your navigation.
    1. Tab
    2. Enter
    3. Right Click
    4. Hover
    5. Today's Date
    6. Hot Keys
    7. Drop-down Lists
    8. Next and Previous Arrows
    9. Check Boxes
    10. Go Arrows
    11. Graphic Mode
    12. Search Select Advanced
    13. Required Fields
    14. Getting Help

3.9.1 Tab

- The Tab key moves you quickly from field to field when entering or changing data that requires keyboard input. Shift + Tab moves the cursor to the previous field.

3.9.2 Enter

- The Enter key is useful when performing searches.
- If you enter a company name as the search criteria during a search and then press Enter, a list of all companies matching your search criteria is displayed.
- It is an alternative to selecting the Find action button.
- The Enter key can also be used to confirm a highlighted selection.

3.9.3 Right Click

- You can right-click the mouse on the Find and New menu buttons to activate shortcut pop out lists.
- You must have the Pop-out List Activation By field set to Click to activate the pop out lists in this way. This field is set in the Preferences tab.

3.9.4 Hover

- The Recent List and the Find and New Pop Out Lists can all be activated by "hovering" over the Recent List, Find, or New buttons with the mouse.
- You must have the Recent List Activation By and Pop Out List Activation By fields set to Hover to activate these lists by hovering.
- These fields are set in the Preferences tab.

3.9.5 Today's Date

- When using Internet Explorer 6, Ctrl + T inserts today's date into a date field. ALT + N will perform the same function in Internet Explorer 7. Alternatively, you can select the Calendar Grid icon next to the Date field. When the date in the
- Date field is within the current month, today's date is highlighted on the calendar.

3.9.6 Hot Keys

- If you like working with your keyboard, a number of hot keys are available to make it quicker and easier for you to perform certain tasks in the system. Different hotkeys are available in different CRM screens. You can identify the availability of a hotkey when you see that the a letter on the action button name is underlined. Selecting Alt plus the letter that is underlined performs that action. For example if the letter T is underlined on the New Task action button on the current screen, selecting Alt and T creates a new task.
- The complete list of hotkeys available are:
  - A. **Alt + A**: Creates a new appointment within the Calendar or Communication tab. The tabs must be in List View to use this hot key.
  - B. **Alt + T**: Creates a new task within the Calendar or Communication tab. The tabs must be in List View to use this hot key.
  - C. **Alt + E**: Creates a new E-mail within the Calendar or Communication tab.
  - D. **Alt + V**: Switches between Calendar and List view within the Calendar or Communication tab.
  - E. **Alt + F**: Filters a list according to the criteria you specified.
  - F. **Alt + N**: Creates a new entity in the current context. For example, in the Documents tab of the Company context.
  - G. **Alt + C**: Lets you exit from some screens.
  - H. **Alt + S**: Saves records.

3.9.7 Drop-down Lists

- Drop-down lists provide predefined lists of selections. They help increase the accuracy of data entry and make filtering and reporting on data much easier.
- Drop-down lists can be accessed by selecting the drop-down arrow with the mouse, or ALT + on the keyboard.

3.9.8 Next and Previous Arrows

- The Next and Previous arrows appear when a list of information extends to more than one page. Clicking on the inner left- or right-pointing arrows displays the previous or next page, respectively. The outer arrows take you to the first or last page within a set of pages.
- For example, if you search for a company without specifying any search criteria, a list of all companies is displayed.
- This is likely to extend over several pages. You can scroll between the pages using these arrows.

3.9.9 Check Boxes

- Check boxes can be toggled on or off by clicking in the check box.
- An example of a check box is the Private field of a communication (task or appointment). You can also toggle the check box using the Spacebar on the keyboard.

3.9.10 Go Arrows

- The green Go allows you to jump to the summary screen of the related record. The blue Go arrow allows you jump to another user's My CRM area from the context area of the screen.

3.9.11 Graphic Mode

- This button is implementation dependent. It is commonly displayed within a tab in the Company context to show relationships between, for example, a parent company and its subsidiaries. Refer to your System Administrator for more details.

3.9.12 Search Select Advanced

- A small magnifying glass displayed next to a small down-pointing arrow indicates that the field is an Advanced Search
- Select Advanced field. An example of where it is displayed is the Wave Activity field on the New Lead page.
- Where the Search Select Advanced icon is present, you can type a few letters, click the magnifying glass icon, and search matches are displayed as hyperlinks underneath the field.
- Click on one of the results and the text box is filled in. If only one item is found, the description is filled in straight away. Alternatively, select the arrow beside the magnifying glass to search using a standard search screen, or select the arrow to clear the current search.
- Once you have linked a record, such as a company or person, to the search select field, you can jump to the summary page of the company or person. A single click on the icon, or a double click on the text, launches the Summary page in a new browser window. Ctrl + Click on either the icon or text jumps to the Summary page within the context of the entity.

3.9.13 Required Fields

- Required fields are flagged with a blue asterisk symbol on all screens in which you enter information. This makes it easier to complete input forms, as you can quickly identify fields that you must complete and fields that you can complete at a later date when you have more information available to do so.

3.9.14 On-screen Coaching

- On-screen coaching can be used to display text in a panel at the top of any CRM screen. This panel can be used to provide information for users, for example, explaining what activities can be carried out on a particular screen, or providing useful tips for performing tasks. If on-screen coaching has been activated by your System Administrator, you can:
- Set on-screen coaching display preferences from the Preferences tab. Please refer to Accessing Preferences for more information.
- You can show or hide the on-screen coaching panel using the Maximize/Minimize button. If you hide on-screen coaching for a screen it will remain hidden when you next log on to CRM.
- You can turn on-screen coaching off with the Turn Off button. Once on-screen coaching has been turned off it will remain turned off when you next log on. You can turn it back on from the Preferences tab.
- Please refer to the *System Administrator Guide* for more information on setting up on-screen coaching.

3.9.15 Accessing Training Materials and Setup Wizards

- The Quick Start tab in the My CRM area provides access to a variety of CRM training materials. Content on the Quick Start tab is listed under four headings:
  A. **Step 1:** Take the Tour! Contains video training that will introduce you to some widely used CRM functionality.
  B. **Step 2:** Configure the System Contains the User Preferences Wizard, which will help you customize some of your CRM settings.
  C. **Step 3:** Quick Tips Contains quick tip sheets that will help you master some common CRM tasks.
  D. **Step 4:** Further Reading Provides access to CRM documentation, including the What's New, User, and Quick Start Guides.

3.9.16 Getting Help

- The Help button is available on the right-hand side of the screen. Selecting the Help button opens a new browser window showing a table of contents and a welcome screen, or a page of help relevant to your current context.

4 Finding Information

FAQs

Show me how to:

- Use the Find menu button.
- Find a company.
- Find a person.
- Find an opportunity.
- Find a case.
- Clear a previous search.
- Combine search criteria.
- Use wild cards.
- Use date field search.
- Use numeric field search.
- Use advanced find.
- Use an existing saved search.
- Create a new saved search.
- Update a saved search.
- Delete a saved search.
- Create saved searches for all users.
- Run actions on search lists.
- Sort lists differently.
- Filter lists differently.
- Set a default find page.
- Change the size of search results list.

4.1 Basic Search Techniques

- The following basic techniques get you started on carrying out searches in CRM:
  - A. Pop Out List or Menu Button with Context Area
  - B. Find Menu and Action Buttons
  - C. Repeating an Earlier Search
  - D. Resetting Search Criteria

4.2 Pop Out List or Menu Button with Context Area

You can initiate a search by:

- Activating the Find Pop Out List. To do this, either right-click or hover over the **Find** menu button, and select the type of search you want to carry out. For example, Person, Case, Sales Opportunity, or Communication.
- Selecting the Find menu button. To do this, select the **Find** menu button, then select the type of search you want to carry out from the context area of the screen.
- You may find it faster to use the Menu Button method if the context of your search is the same as the last search that you carried out.
- If the context of your search is different from your last one, you may find the Pop-out List method easier.

4.3 Find Menu

- Whichever method you use for initiating a search, the basic sequence is the same:
  A. Call up a find screen using the **Find** button on the *left-hand side* of the screen. This is the Find *Menu* button.
  B. Type in the search criteria.

4.4 Repeating an Earlier Search

- Don't forget the Recent List. This lists the most recent information you have been working with.
- It's a fast way to get back to most frequently "opened folders" of Prospect / Lead / Opportunity information.
- You can also use the icons on the recent list headings to open the corresponding search page.

4.5 Resetting Search Criteria

- When you perform a search in the normal way, that is, using the Find button and specifying search criteria, the Search Results page is displayed reflecting the criteria you specified.
- However, if you return to that same Search page any time during the same session, you will notice that the Search Results page you generated earlier remains on-screen.
- To clear the page and perform a new search:
  A. From the Search Results page, select the **Clear** action button.
  B. Specify new search criteria, and click on the **Find** action button. A New Search Results page is displayed.

4.6 Combining Search Criteria

You can combine any number of criteria on the Search screen. This example shows you how to combine Company Name and Person Name search criteria.
To combine search criteria:

- Right-click on or hover over the **Find** menu button.
- Select **Person** from the pop out list.
- Click on the **Clear** button to clear your last search from this page.
- Type the person name or part of the name in the **Last Name** field, and the company name in the **Company Name** field.
- Click on the **Find** action button or press Enter.
- Click on the **hypertext link** of the person you want to drill down on.

4.7 Wild Card Search

- You can use the wild card search on any field on the search screen. This example uses the wild card with the Company
- Name field. The wild card in CRM is the "%" symbol. The % wild card means 'contains the value'.
- To search using a wild card:
  A. Select the **Find** menu button.
  B. In the company or person context type, for example, **%software** in the Company Name field and select the **Find** action button.
  C. All companies containing the word "software" are returned from this search.

4.8 Date Field Search

- A System Administrator can add date search fields to any find screen in CRM.
- Some CRM find screens already have a date search capability by default.
- For example, on the Lead find screen you can search for leads that were created either between two specified dates or within a certain period relative to a specified date.
- To search using date fields:
  A. Right-click on or hover over the **Find** menu button. The Pop Out list is displayed.
  B. Select **Lead** from the pop out list. The lead Find page is displayed.
  C. Click on the **Clear** button to clear your last search from this page.
  D. Select **Between** from the Created Date drop-down list.
  E. Click on the first **calendar** button and select a date.
  F. Click on the second **calendar** button and select a date.
  G. Click on the **Find** action button or press Enter. A list of all opportunities matching your search criteria is displayed

4.9 Numeric Field Search

- A System Administrator can add numeric search fields to any find screen in CRM. Please refer to "Screen Customization" in the *System Administrator Guide* for details on adding fields to a screen.
- For the following example, the Opportunity: Total Quoted Price field was added to the Opportunity find screen. Say you would like to see how many opportunities you currently have with a total quoted price over $10,000.
- To search using numeric fields:
  - A. Right-click on or hover over the **Find** menu button. The Pop Out list is displayed.
  - B. Select **Opportunity** from the pop out list. The opportunity Find page is displayed.
  - C. Click on the **Clear** button to clear your last search from this page.
  - D. Select **Greater Than** from the Opportunity - Total Quoted Price drop-down list. Select the dollar (**$**) sign from the currency symbol drop-down list and type **10000** in the value field.
  - E. Click on the **Find** action button or press Enter. A list of all opportunities matching your search criteria is displayed.

4.10 Using Advanced Find

- You can use the Advanced Find feature to perform complex database searches. Advanced find searches can be based on any of the main CRM entities - these are Case, Communication, Company, Lead, Opportunity, Order, Person, Quote,nand Solution.
- Advanced Find allows you to create enhanced searches based on a WHERE clause, and the criteria for selection can be extended using the AND and OR clauses. For example, you might create an Advanced Find search for all companies WHERE the city equals Chicago AND the number of employees is over 1000 OR the annual revenue exceeds $10 million.
- While creating an Advanced Find search you can click on the Preview SQL button at any time to review the SQL query behind your search.
- If you are a System Administrator, two extra buttons are displayed with the results of an advanced find - Mass Updates and Update Territory. Please refer to Performing a Mass Update on a Group for more information on Mass Updates, and Updating Group Territories for information on Updating Territories.
- For information on saving Advanced Find search criteria, please refer to Creating a New Saved Search. For information on creating a new group based on the results of an advanced find, please Creating a Group Based on a Primary Entity Search.
- Say you would like to see a list of all prospect companies in the United States.
- To search using advanced find:
  - A. Right-click on or hover over the **Find** menu button. The Pop Out list is displayed.
  - B. Select **Advanced Find** from the pop out list. The Advanced Find page is displayed.
  - C. Click on the **Clear** button to clear your last search from this page.
  - D. Select **Company** from the Entity drop-down list.
  - E. Select **Address: Country** from the Field Name drop-down list and click on the Add button.
  - F. Select **Company: Type** from the Field Name drop-down list and click on the Add button. Then repeat this action to add a second Company: Type field. You have now added the fields on which your search will be based. You must now set up the values for the selected fields and the relationships between those fields.
  - G. For the Country field, select the **equals** operator, and select **United States** from the Value drop-down list.

H. Select **And** from the And/Or drop-down list.

I. For the first Company: Type field, select the single opening bracket from the (drop-down list. Brackets must always enclose an Or statement. In this example, you will be searching for companies that are either prospects, so you will enclose these two search terms within single brackets.

J. Select the **equals** operator and select **Customer** from the Value drop-down list.

K. Select **Or** from the And/Or drop-down list.

L. For the second Type field, select the **equals** operator and select **Prospect** from the Value drop-down list.

M. Select the single closing bracket from the) drop-down list.

N. Click on the **Find** action button or press Enter. A list of all companies matching your search criteria is displayed.

4.11 Using an Existing Saved Search

- There are a number of predefined saved searches available within different Find screens that you may find useful.
- For example, the My Accounts (Companies) saved search—available from the Find Company screen—is set up to return a list of all of the companies assigned to you. The My Cases In Progress saved search—available from the Find Case screen—returns all the active cases currently assigned to you.

4.12 To display a predefined saved search:

- Select the **Find** menu button and select the entity that the saved search is contained within.
- Choose the saved search you want displayed from the Saved Search drop-down. The selected saved search list is displayed.

4.13 Creating a New Saved Search

- When you perform a search to return Companies, People, Opportunities, Orders, Quotes, Cases, Solutions, Leads, or Communications that match specific search criteria, you may want to save the list and reuse it.
- You can save an advanced find search in the same way as you would any other search. However, only a System Administrator or Info Manager can make an advanced find search available to other users.
- You can also create a group to save search criteria. Please refer to Creating a Group for more information.

4.14 To create a new saved search:

- Select the **Find** menu button and select an entity from the Find drop-down list, for example Company.
- Select your required search criteria and click on the **Find** button. Your search results are displayed.
- Click on the **New Search** button next to the Saved Search drop-down. The Saved Search details box is displayed.
- Type in the name of the new saved list, for example, San Francisco Companies - 21 - 50 Employees.
- Select **Save**.

4.15 Updating a Saved Search

You can make changes to your saved searches using the action buttons located beside the Saved Search drop-down list.
To update a saved search:

- Select the **Find** menu button and select an the entity that the Saved Search is saved under from the Find dropdown list, for example Company.
- Select the Saved Search you wish to update from the Saved Search drop-down list.
- Select your new search criteria and click on the **Find** button. Your new search results are displayed.
- Select the **Update** action button at the top of the screen.
- When the Saved Search details box is displayed, you can change the name of the saved search if you wish.
- Select **Save**.

4.16 Deleting a Saved Search

You can delete saved searches that are no longer useful to you.
To delete a saved search:

- Open the saved search you no longer use by selecting it from the Saved Search drop-down list at the top of the
- Find screen it is saved in.
- Select the Delete action button beside the Saved Search drop-down list.

4.17 Creating Saved Searches for all Users

If you are an Info Manager, you can create saved searches that are available to all users in the system.
To create a saved search that is available to all users:

- Select the **Find** menu button and select an entity from the Find drop-down list, for example Company.
- Select your required search criteria and click on the **Find** button. Your search results are displayed.
- Click on the **New Search** button next to the Saved Search drop-down. The Saved Search details box is displayed.
- Type in the name of the new saved list, for example, San Francisco Companies - 21 - 50 Employees.
- Select the **Available To All Users** check box and select **Save**.

4.18Running Actions on Search Lists

You can perform a number of actions on all types of search lists— lists returned by a standard search, lists returned
by Advanced Find, lists based on saved searches, or the My CRM Contacts list. Actions available are:

- **New Document.** You can create a merged document for all contacts contained in your list.
- **New Task.** You can create a new task with the same details for each of the contacts on your list.
- If you have the appropriate rights, the following two actions are also available:
- **New E-mail.** You can create an e-mail with merge fields, which can be sent to all of the contacts on your list.
- **Export to File.** You can export your list of contacts, and contact details, to a spreadsheet or to a text file.
- To run an action on a search list:
    A. Return a search list by either performing a standard search or selecting a saved search from the Saved Search drop-down list at the top of the screen.
    B. Select one of the Action buttons on the bottom, right-hand side of the screen. The action you selected is performed.

4.19Counting

- You can view the number of records in a list to give you an idea of the total length of long lists. A record counter is displayed in the top left-hand corner of most lists. It also shows the page number out of the total number of pages containing records. Hovering over the right-pointing arrow indicates that the next page shows records 11-20 out of a total of 22.

4.20 Filtering

You can easily change the way lists of information are displayed. This example shows you how to change the way you view the list of communications within the context of a company can produce a long list of historical and current activities.
To narrow down this list to show only Pending communications:

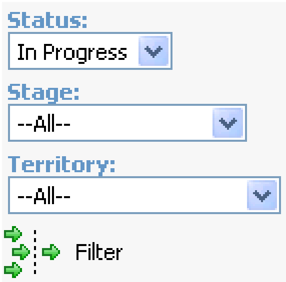
- Within the context of a company, click on the **Communications** tab.
- To view only the pending communications, select **Pending** from the Status list on the right-hand side of the page.
- Click on the **Filter** button. The list of communications is restricted to show only those with a status of Pending.
- This filter applies to all Company Communications lists until changed or until the user logs out.

4.21 Lead Filter Box

This box is displayed on the Lead Summary page. To customize this screen, select Administration | Customization | Lead | Screens | LeadListFilter.

Field	Description
Status	Filter Leads List by this filed
Stage	Filter Leads List by this filed
Company Name	Filter Leads List by this filed
First Name	Filter Leads List by this filed
Last Name	Filter Leads List by this filed
Territory	Filter Leads List by this filed
Mobile Number	Filter Leads List by this filed

4.22 Opportunity Filter Box



Field	Description
Status	Filter Opportunities List by this filed
Stage	Filter Opportunities List by this filed
Territory	Filter Opportunities List by this filed

4.23 Sorting

The sort order of any list can be changed where a list column heading is underlined. This example shows you how to change the sort order of the Calendar list from Date/Time to Action type.

- Select the **My CRM** button.
- Make sure you are in the List View. If you are in Calendar View, switch to **List View** by clicking the List View button.
- Click on the **Action** column heading. The Calendar list is sorted by Action. The triangle next to the column heading indicates the column by which the list is currently sorted.
- To change the sort order back to Date/Time, click on the **Date/Time** column.

This example changes the sort order of your Calendar list from ascending Date/Time to descending Date/Time.

- Select the **My CRM** button.
- Click on the **Date/Time** column heading. The Calendar list is now sorted by Date/Time with the most recent pending communication first.
- To change the sort order back to ascending, click on the **Date/Time** column. The Calendar list reverts back to the original sort order.

4.24 Setting a Default Find Page

- You can specify the Find screen that you want to appear at the beginning of a session. However, note that the system "remembers" your last Find, until you change it. This means you can set your default Find screen to be Company.
- However, as soon as you search by Person, the next time you press Find, the person Find page is displayed.
- To specify a default Find page:
    - From within **My CRM | Preferences** tab, select the **Change** action button.
    - Select the **Find Screen** you want to set as the default from the **My Default Find Screen** field, and select **Save**.

4.25 Setting the Size of the Search Results List

- To specify the default maximum length of lists and grids on any page:
    - From within **My CRM | Preferences** tab, select the **Change** action button.
    - Select the default maximum length from the **Grid Size** field, and select Save.

5 Handling Leads

FAQs

Show me how to:

- Define what a lead is.
- Understand the fields on the leads screen.
- Create a new lead.
- Search for an existing lead.
- Match a lead to an existing company.
- Qualify a lead.
- Convert a lead to an opportunity.
- Manually progress a lead.
- View the lead pipeline.
- Run a leads report.
- Find out what leads I am working on.
- Create a lead from other contexts.
- Delete a lead.

5.1 What is a Lead?

- A lead represents unqualified information received from, for example, your corporate Web site, trade shows, and purchased mailing lists.
- A lead exists outside of the context of a person or company. This is to prevent the system from becoming overloaded with thousands of unclean, unqualified companies and people.
- Only when the lead has been qualified and is ready to be converted to an opportunity is a new company and person record created. If the company and person already exist in your system, the lead details can be matched to the existing company and person record.
- This chapter does not describe how to import leads from, for example, purchased lists of data. This requires System Administrator rights to carry out a Data Upload. Please ask your System Administrator for more information.

5.2 Lead Workflow Actions:

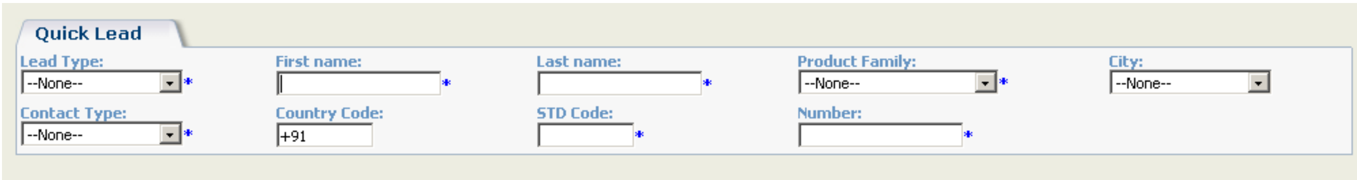
Once you have entered the new lead details in to Sage CRM, you would try to communicate with that lead in order to find out whether he is really interested in to your product.

The lead workflow actions, makes end users follow a set process. Following are lead workflow actions:

5.3 Creating a New Lead

- To capture a new lead:
  - Right-click on or hover over the **New** menu button, and select Lead from the pop out list.
  - Enter the details and select the **Save** button. When you do this the Lead Summary page is displayed.
  - Following are the screenshots & field descriptions of the involved screens

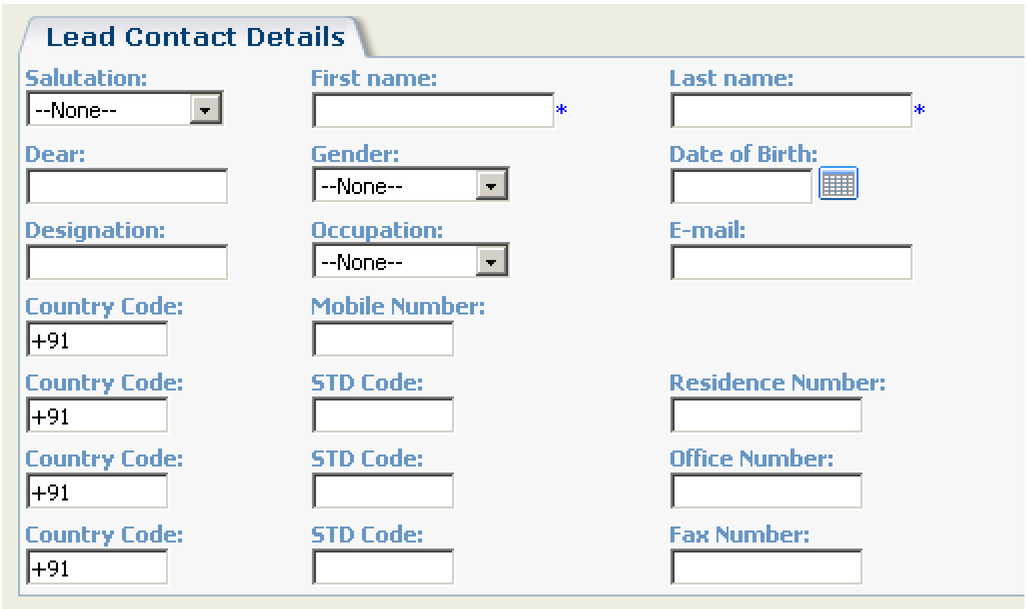
5.3.1 Quick Lead Screen



Field	Description
Lead Type	Individual / Organization
First Name	Mandatory
Last Name	Mandatory
Contact	Mandatory field – drop down Office, Residence, Mobile 3 more numeric fields to capture the contact number: Country code, STD code, Contact number
City	(Address City) Non-Mandatory
Product Family	Mandatory Non editable if User’s type = Sales Person Editable (drop-down) if User’s type = Non Sales Person
Channel	Drop down field with values: Branch, E-mail, SMS, Call center, Web

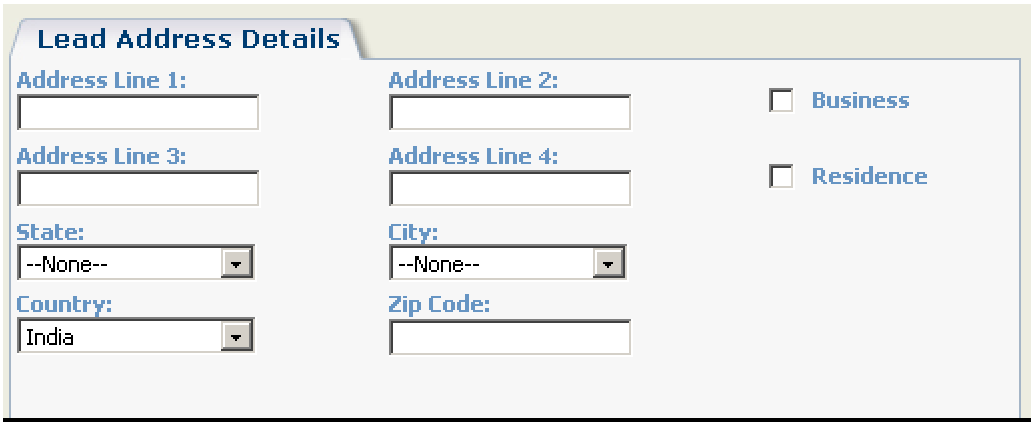
5.3.2 Main Lead Screen

5.3.2.1 Lead Contact Details



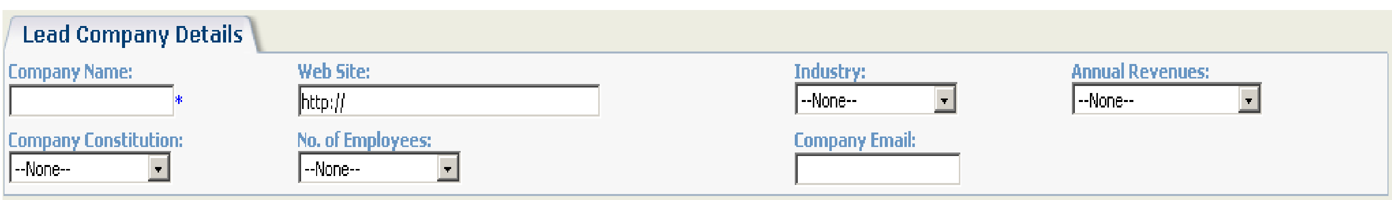
Field	Description
Last Name	Last name of the lead person
First Name	First Name of the lead person
Salutation	Salutation of the lead person
Designation	Designation of the lead person
E-mail	E-mail of the lead person
Country Code	Country Code of the lead person
STD Code	STD code of the lead person
Office Number	Office Number of the lead person
Country Code	Country Code of the lead person
STD Code	STD code of the lead person
Fax Number	Fax Number of the lead person
Residence No.	Residence No. of the lead person
Mobile Number	Mobile Number. of the lead person Mobile Validation – minimum 10 digits of the lead person
Mob Country Code	Country Code is +91 set by default. Mobile Country Code of the lead person
Date of Birth	Date of Birth of the lead person
Occupation	Occupation of the lead person
Dear	Auto concatenation of Salutation, First name & Last Name of the lead person

5.3.2.2 Lead Address Screen



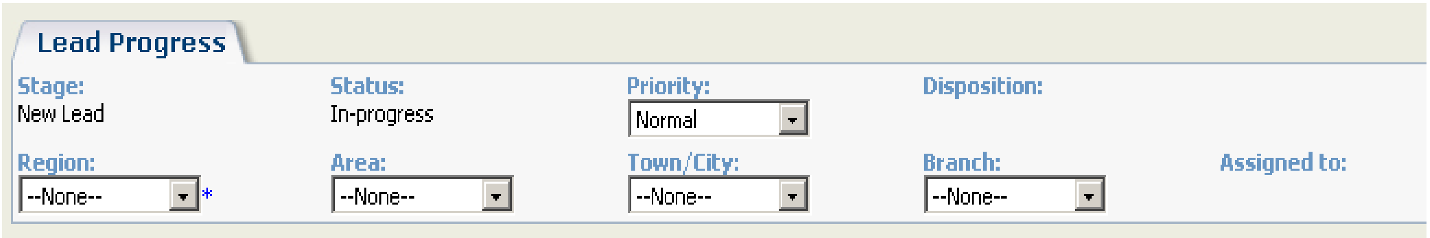
Field	Description
Address Line 1	Address Line 1 of Lead's Address
Address Line 2	Address Line 2 of Lead's Address
Address Line 3	Address Line 3 of Lead's Address
Address Line 4	Address Line 4 of Lead's Address
City	City of Lead's Address
Pin Code	Pin Code of Lead's Address
State	State of Lead's Address
Country	Country of Lead's Address , By Default set to India
Business	A Checkbox denoting that this Address is lead's Business address
Residence	A Checkbox denoting that this Address is lead's Residence address

5.3.2.3 Lead Company Screen



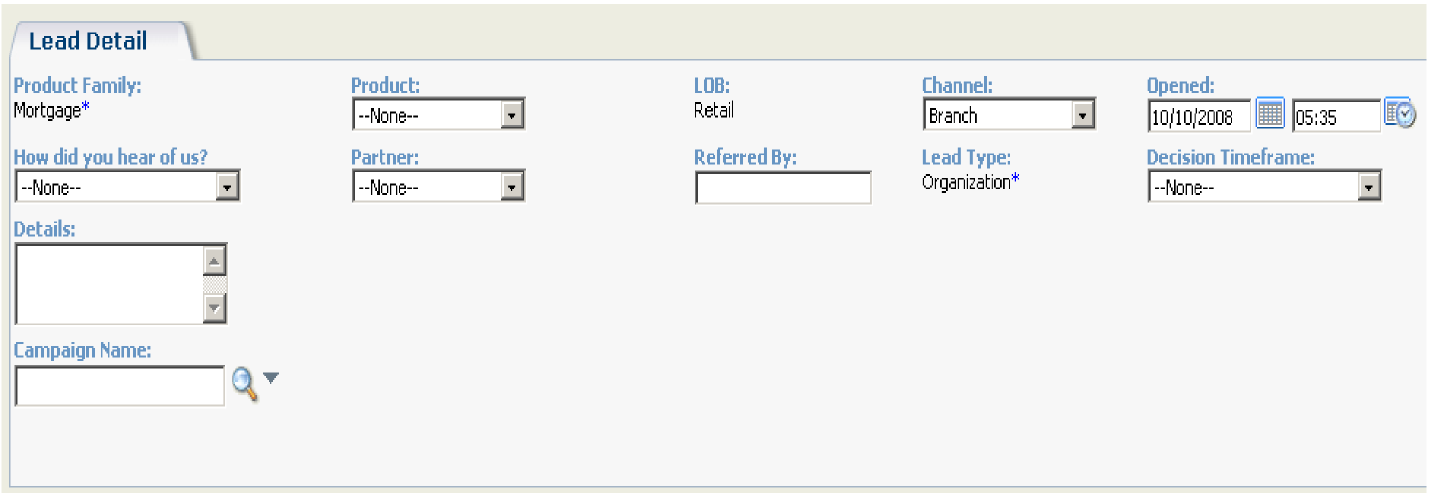
Field	Description
Company Name	If Lead type = Individual, Enter the company name where an Individual is working or If lead type = organization enter the name of he organization Mandatory for "Lead Type" = Organization.
Web Site	The company URL These details are displayed only if the "Lead Type" is Organization. Else these fields will be hidden (this & below mentioned fields)
Industry	The Industry that this company belongs to
Annual Revenues	Company revenue
No. of Employees	No. of Employees in the company
Company E-mail id.	Company E-mail id.
Company Constitution	What type of company constitution is it, eg Public Ltd , Pvt Ltd. Etc.

5.3.2.4 Lead Progress Screen



Field	Description
Current Stage	This is a Read only field which denotes the stage of the lead. The values of this field are driven through workflow. Field Values: 1. Call back 2. Un-assigned 3. Assigned 4. Re-assigned 5. Call scheduled 6. Call back scheduled 7. 2nd call back scheduled 8. Converted
Status	This is a Read only field which denotes the status of the lead. The values of this field are driven through workflow. Field Values: 1. In-progress 2. Opportunity 3. Lost
Priority	High / Medium / Low
Assigned To	Shows name of the person handling this lead
Region	The region to which the lead is assigned to. Eg. West, North etc.
Area	The Area to which the lead is assigned to. Eg. Maharashtra, Kerala etc.
Town/City	The Town/City to which the lead is assigned to. Eg. Navi Mumbai, Pune etc.
Branch	The Branch to which the lead is assigned to. Eg. Vashi, Dadar etc.
Disposition	This field would capture the dispositions, reasons for closing the lead at relevant stages. Vlues would be auto populated in this field on Main Lead screen

5.3.2.5 Lead Details Screen

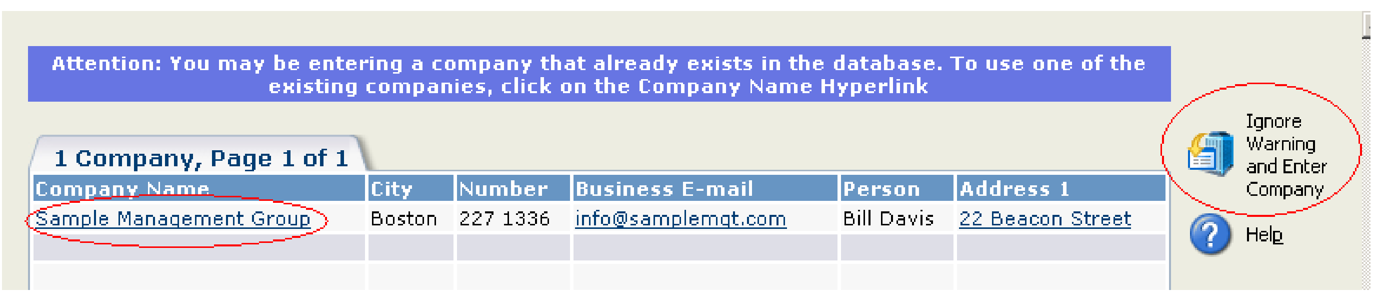


Field	Description
Product Family	Mandatory – Non editable which is Auto populated from Quick Lead screen. Dentes the product family of the Lead's interest
How did you hear of us?	How did the lead hear of us? Drop-down field – values: News paper Advertisement, Online Advertisement, TV Adv, Website, Trade Press, Trade show, Employee referral, Customer referral, Word of mouth
Opened	The date when the lead was opened. Open date cannot be greater than Create date (the date when lead is being entered in the system)
Product	Main Product Interest
Notes/ comments	Further details, notes, comments about lead
Campaign Name	The Campaign that this lead is generated through
Decision Timeframe	Time required to make a decision
Partner	Name of partner, if lead came through a partner
LOB	Line of business of the main product interest 1. Retail, 2. Corporate Finance, 3. Wealth Management, 4. Securities Auto populate on the basis of Product Family selected
Channel	Through which channel did this lead contacted our company. Drop down field with values: Branch, E-mail, SMS, Call center, Web
Referred by	Name of the referrer
Lead Type	Individual / Organization (auto populated from quick lead screen)

5.4 Matching a Lead to an Existing Company / Person

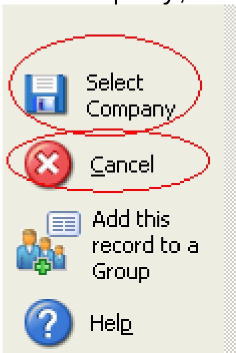
- If you get a "Possible Company Match" message when you save a new Lead, the company may already exist in the system. It is worth seeing if the unqualified lead you are working on corresponds to a valid company record in your system. If it does, you can link the raw lead details to the company by matching the two together. This provides you with a valuable source of information on the company you are dealing with, which may assist in the lead qualification process.
- To match a lead to an existing company:
  - Select the **Add Or Find This Company** button. A list of possible company matches is displayed in a new browser window.

  - Click on the **hyperlink** of the company you think is likely to match. The Company Summary page is displayed in the new browser window.



  - You can browse further company information by clicking on company name hyperlink or directly ignore the warning & add new company.
  - When you click on company name hyperlink, to verify a successful match by viewing information stored in the rest of the Company tabs.

- If you think you are dealing with this company, click on the **Select Company** button.



- If not, then click on cancel, to go close this pop-up & find out whether the Lead Person you are dealing with already exists. Just click on the **Add Or Find This Person** button on lead summary screen.
- If the company exists but not the person, you can go ahead and add a new person. You can do this now or wait until later. You are not required to do this until you have fully qualified the lead and are ready to convert it to an opportunity.
- Remember that the unqualified lead data is separate from your core "clean" data. If the person does not yet exist in your Person records and the lead turns into a dead end, you have added a low value contact into your core company database.
- If there is a potential company and person match, priority is given to company. When you select the company to match it, the person is automatically matched to an existing person in that company.
- You can keep the default matched person, or you can add the unmatched person (whose details are on the Lead Contact Details) to CRM and then match them to the lead instead.
- If the lead turns into a potential sale (opportunity), you are required to incorporate the Lead Company and Person into the main Company and People records.

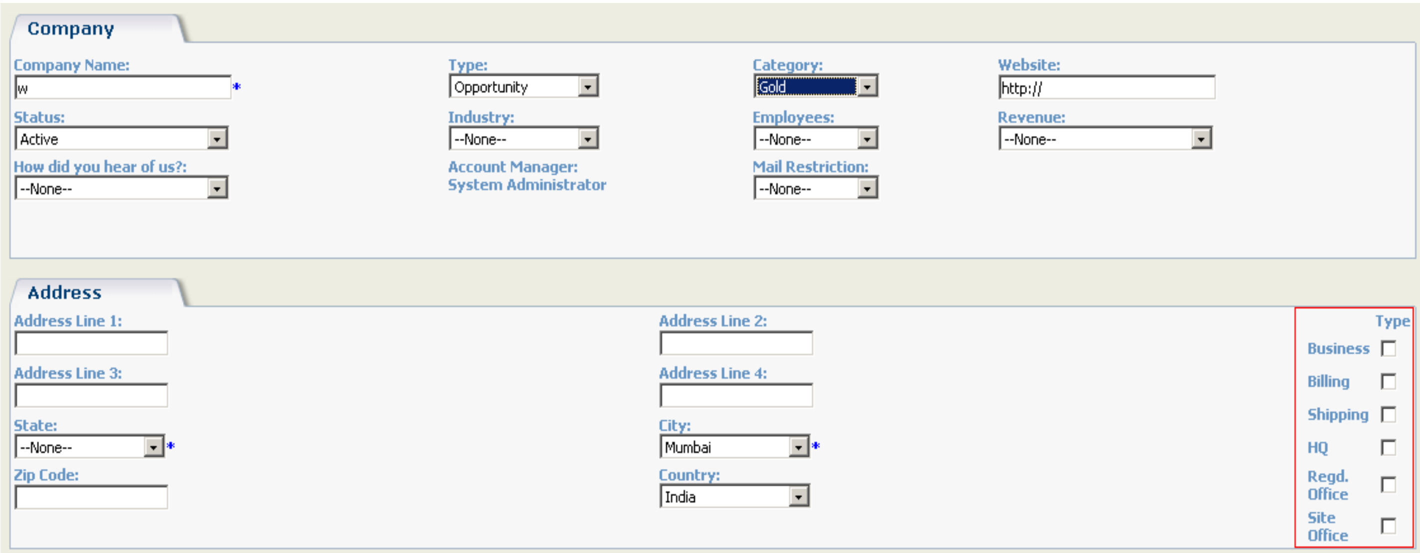
Important Note:

Every Lead must be mapped to a Contact before we can convert it to an Opportunity

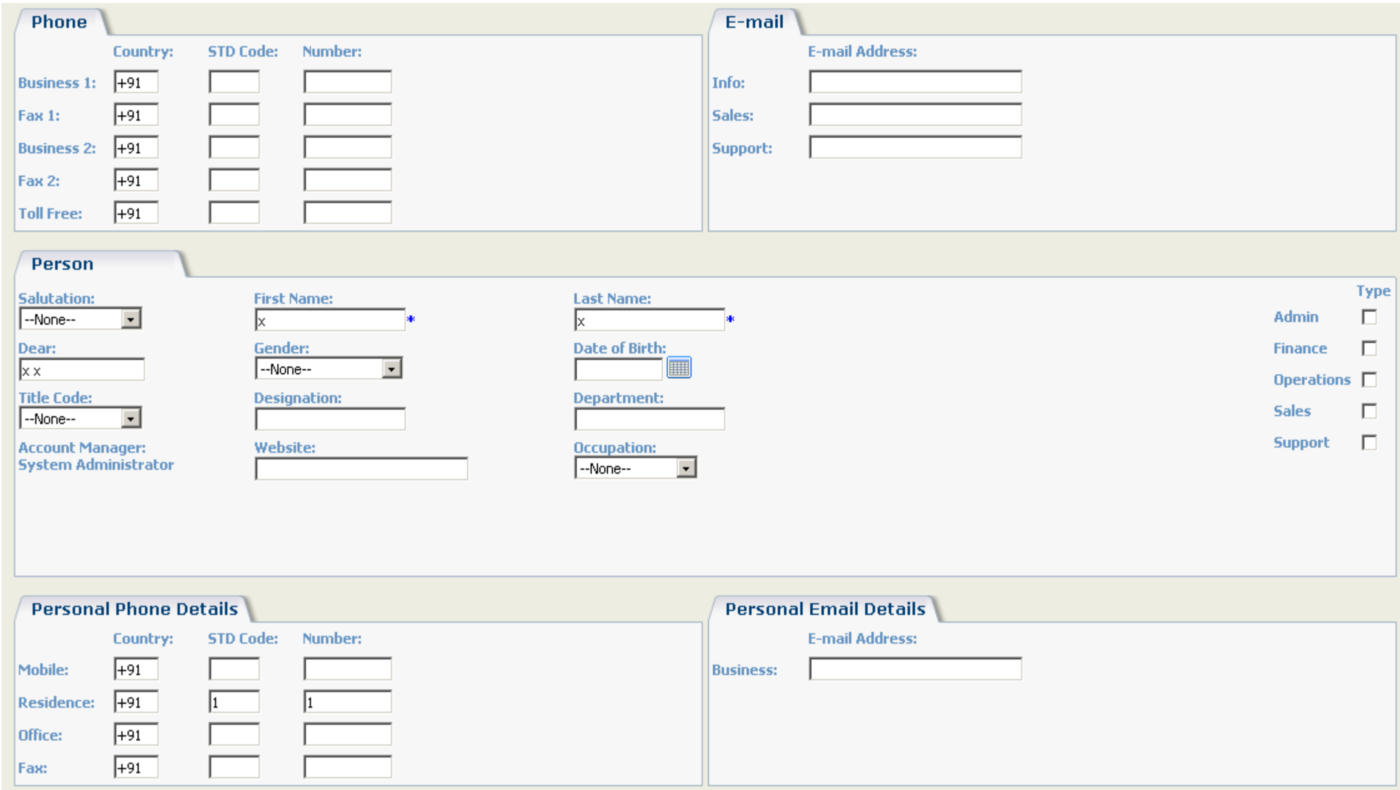
- This above step is important step while converting lead in to an opportunity.
- You have a lead which you want to convert to opportunity
- But you check in existing contacts database to find out whether you already have that lead person / company in your contact list.
- If a match between lead and contact is found, then we map this lead to that contact
- If match is not found, we save the contact & address details of this lead in our Contacts database.
- Now once we have mapped the lead to a contact, we can click on the “convert to opportunity” button & convert the lead to an opportunity

5.5 Adding a Contact: Company

- If match between lead & contact is not found, we save the contact & address details of this lead in our Contacts database.



Field	Description
Company Name	Name of the company
Type	Type of relationship to your company. For example, Prospect, Supplier, or Customer.
Category	It will contain category values like None, Gold, Silver, Bronze.
Website	The company URL
Status	Current status, for example, Active or Inactive
Segment	Industry sector, for example, Retail or Financial Services.
Employees	Number of people employed by the company
Revenue	Company revenue
Source	How contact with the company was initiated. For example, Tradeshow or Customer Referral.
Territory	Change to invisible in the front end This would be the User's home territory
Account Manager	Read only
Mail Restriction	A flag to allow or prevent the company being added to mailing lists.
Address Line 1	First line of the address
Address Line 2	Second line of the address
Address Line 3	Third line of the address
Address Line 4	Fourth line of the address
City	A dropdown field to select address city
State	A dropdown field to select address state
Zip Code	Zip or postal code of the address
Country	Country the address
HQ	Head Quarters address (For Company Address only)
Regd. Office	Registered Office address (For Company Address only)
Site Office	Site Office address (For Company Address only)
Business	Business Address (For Company Address only)
Home	Home Address (For Company Address only)



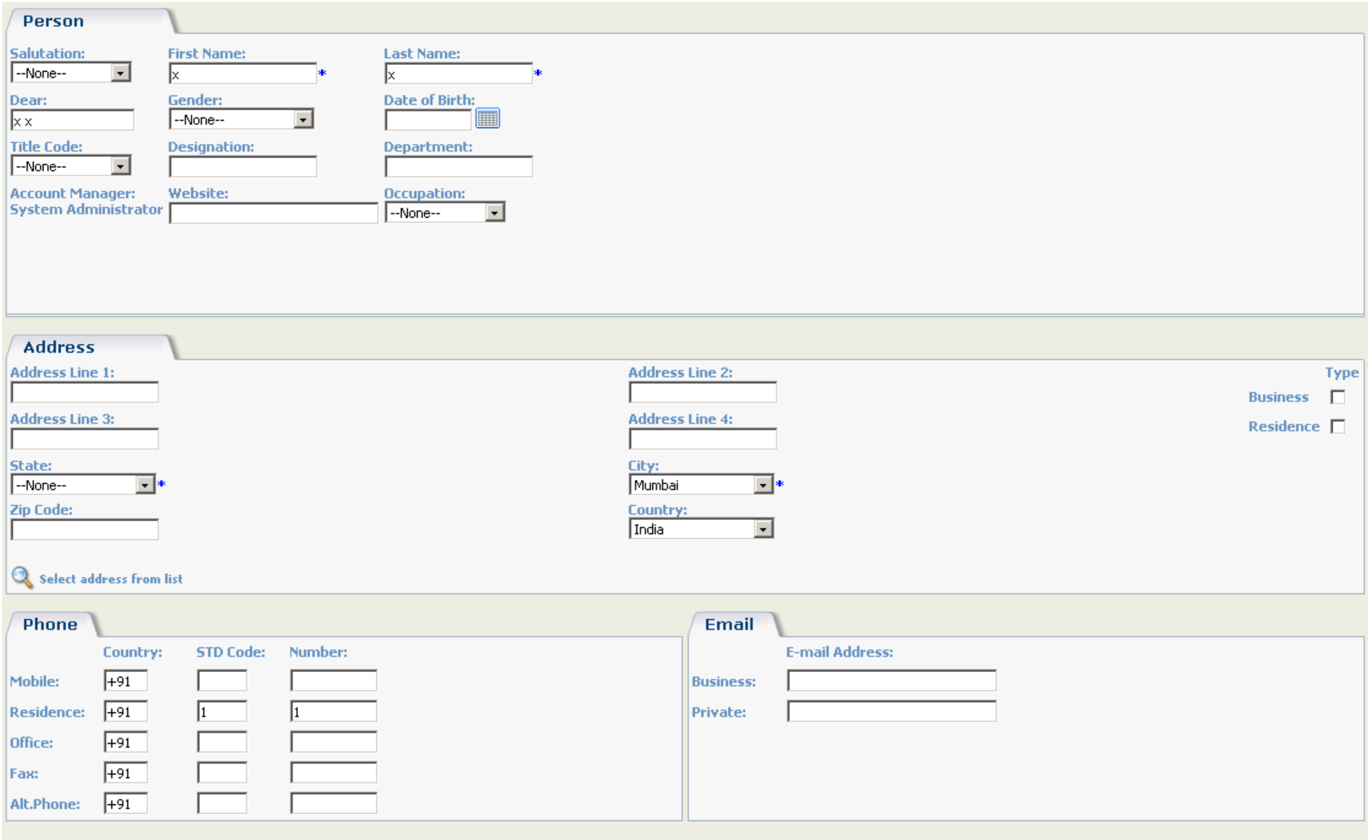
<u>Phone Details</u>

Field	Description
Business 1	The business phone number 1
Fax 1	Fax number 1
Business 2	The business phone number 2
Fax 2	Fax number 2
Toll Free	Toll Free phone number
STD Code	STD code

<u>Person Fields:</u> *The details of main contact Person of this company*

Field	Description
Last Name	Last name of person
First Name	First name of person
Salutation	Eg. Mr. Ms, Dr, Mrs.
Designation	Designation of the person
E-mail	Email of contact person
Country Code	Country code, +91 set by default
STD Code	STD code
Office Number	Office number
Fax Number	Shift to Line 6
Residence No.	Residence No.
Mobile Number	Mobile number of person – minimum 10 digits
Date of Birth	Date of Birth
Occupation	Occupation of the person
Dear	Auto concatenation of Salutation, First name & Last Name

5.6 Adding a Contact: Person

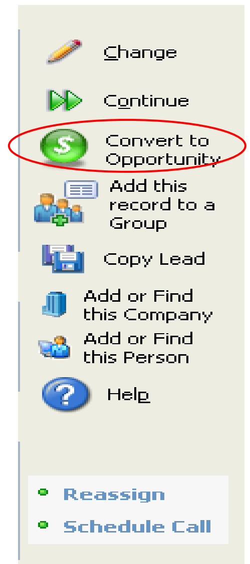


Field	Modification
Last Name	Last name of person
First Name	First name of person
Salutation	Eg. Mr. Ms, Dr, Mrs.
Gender	Male / Female
Title Code	Manager, Supervisor etc
Designation	Actual Designation eg. Junior Manager
Department	Department
Territory	This will be an invisible field. It will be set to the “Assigned To” user’s home territory
Website	Website relevant to the person or person details
Occupation	Occupation of the person. It is auto-populated from the Lead Screen.
Private	Enter Private email address of the person

All other fields are same as **Add Company** screen & are self explanatory

5.7 Converting a Lead in to an Opportunity

- Once we have mapped the lead to a contact, we can click on the "convert to opportunity" button & convert the lead to an opportunity



- The further details about entering a new opportunity & woring with opportunities is explained in detail in the **"Opportunities"** Chapter

5.8 COPY LEAD BUTTON:

- This button copies the all the details of lead except product interest details, in case of multiple products asked for by the lead.
- This button would duplicate all the details already filled up & leave "LOB", "Product Family", "Product", "Region", "Area", "City" & "Branch" fields to be selected again so that "Assigned to" field is re-populated.

5.9 Searching for an Existing Lead

To search for a lead:

- Right-click on or hover over the **Find** menu button, and select **Lead** from the pop out list.
- Type in the name of the person, or combine any other search criteria available to you.
- Select the **Find** action button.
- Click on the **hyperlink** of the lead description to open the lead you want to view.
- You can see the details of the lead and view related communications and notes from within the context of the lead.

5.9.1 Searching for a Person

- You can search for a person by any criteria or combination of criteria on the Search screen. This example shows you how to search by Last Name.

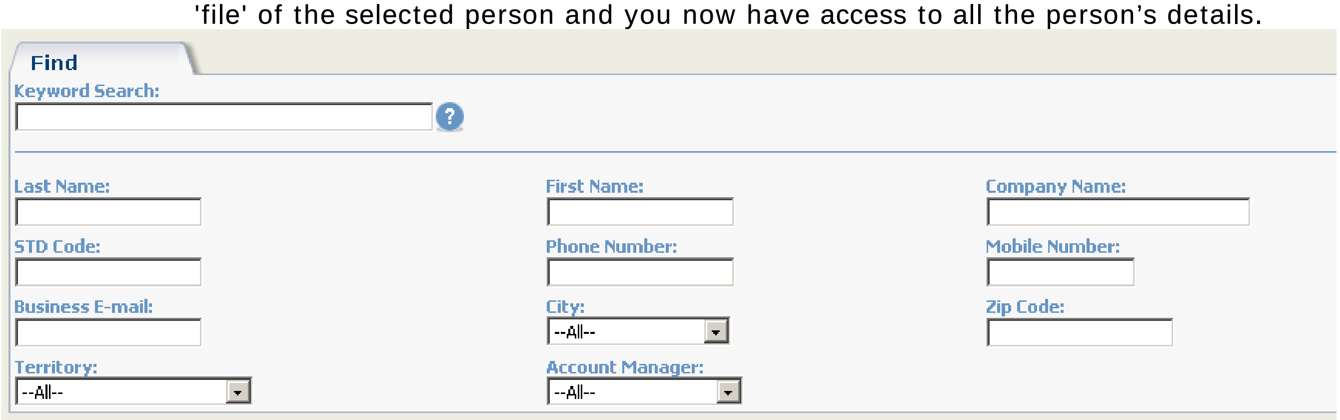
A. Select the **Find** menu button.

B. If you are not in the Person context, select **Person** from the context area of the screen.

C. Type the last name, or part of the last name in the **Last Name** field.

D. Select the **Find** action button on the right-hand side of the screen. A list of people matching your search criteria is displayed.

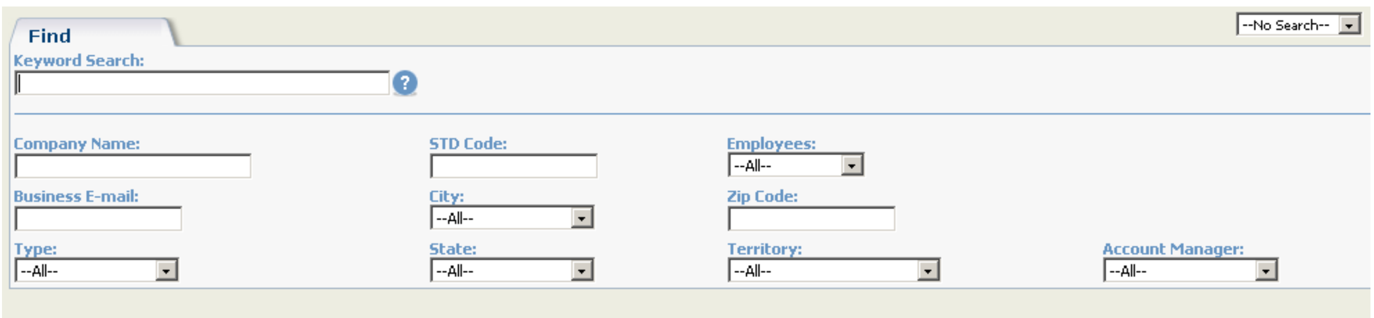
E. Click on the **hypertext** link of the person you want to drill down on. This opens the 'file' of the selected person and you now have access to all the person's details.



Field	Description
Keyword Search	Search by Keyword
Last Name	Search by Last Name
First Name	Search by First Name
Company Name	Search by Company Name
Area Code	Search by Area Code
Phone Number	Search by Phone Number
Business E-mail	Search by Business E-mail
City	Search by City
Zip Code	Search by Zip Code
Territory	Search by Territory
Account Manager	Search by Account Manager
Mobile No	Search by Mobile No

5.9.2 Searching for a Company

- You can search for a company by any criteria or combination of criteria on the Search screen. This example shows you how to search by Company Name.
  - A. Right-click on or hover over the **Find** menu button.
  - B. Select **Company** from the pop out list.
  - C. Type the company name or part of the company name in the **Company Name** field and select the Find action button on the right-hand side of the screen. A list of all companies matching your search criteria is displayed.
  - D. Click on the **hypertext** link of the company you want to drill down on. This opens the 'file' of the selected company and you now have access to all the company's details.



Field	Description
Keyword Search	Search by Keyword
Company Name	Search by Company Name
STD Code	Search by STD Code
Employees	Search by number of Employees
Business E-mail	Search by Business E-mail
City	Search by City
Zip Code	Search by Zip Code
Type	Search by Type
State	Search by State
Territory	Search by Territory
Account Manager	Search by Account Manager

5.10 Re-assigning the Lead:

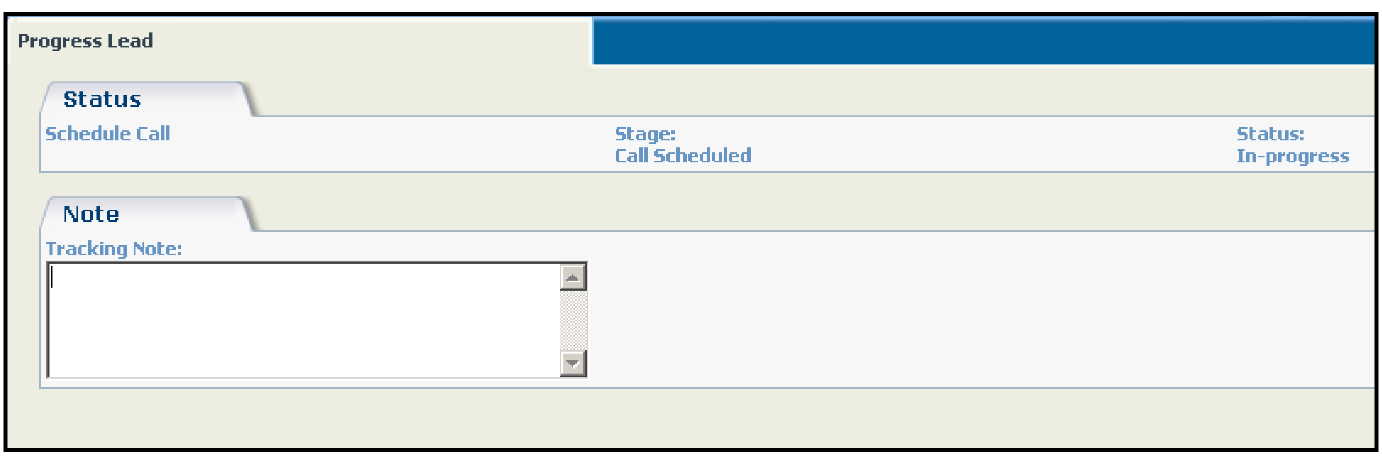
- Under certain circumstances it might be necessary to re-assign a lead from one sales person to some other sales person.
- This screen can be used by sales manager / supervisor for reassigning the lead.

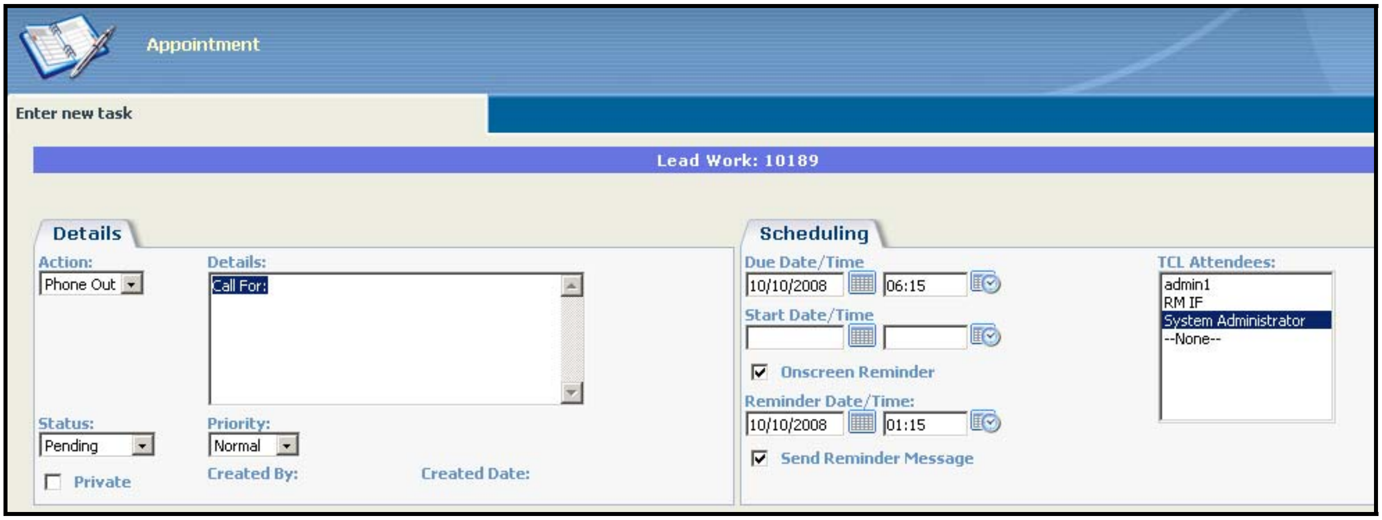
Lead Re-assign Screen

Field	Description
Stage	Denotes stage of lead, Read only value driven by workflow, values are same as given earlier in the document.
Status	Denotes status of lead, Read only value driven by workflow, values are same as given earlier in the document.
Assigned To	The name of person to whom you want to re-assign this lead to.
Tracking Note	Any note you want to give for reassigning

5.11 Scheduling a call:

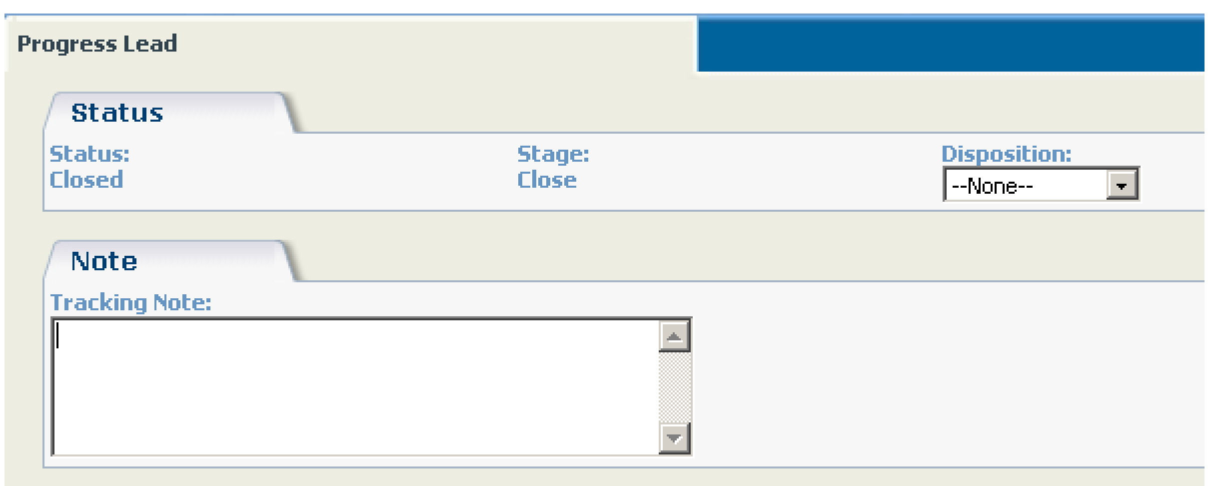
- Once the lead details are entered in the system, the sales executive can communicate with the lead in variety of ways.
- One of them is to schedule a call with the lead
- This can be done using the schedule a call screen
- Enter a tracking note & Click on Save button on the right hand side. You will see following screen



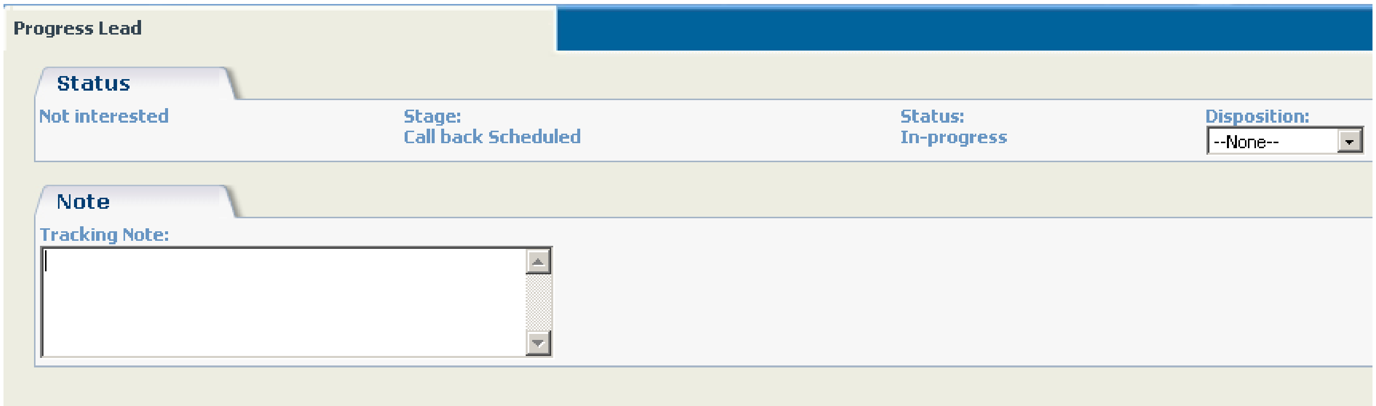


- After you enter call details in above screen & click on save, you will be redirected to lead summary screen. Where the workflow actions will now show different actions

- **Not Interested:** Person is not interested
- **Reassign:** We can again re-assign the lead after 1st call
- **Not Reachable:** The person is not reachable. When we click on this, then workflow takes us directly to the close lead screen



- When we click on not interested Workflow takes us to call back rescheduled stage



- When you click on save button, the workflow actions change to :

- Now after 2nd call, lead is still not interested, then following screen is shown:

Field	Description
Status	Status of lead
Assigned To	The person to whom lead was assigned to
Reason not Interested	Reason the lead was not Interested
Tracking Note	Any specific tracking note about this action.

Note: The others forms of communications are mentioned in detail, in later chapters.

5.12 Viewing the Lead Pipeline

- To view a graphical representation of Leads that you are currently working on:
- Select the **My CRM** button. Click on the **Leads** tab. A list of leads assigned to you, with a status of In Progress, is displayed. A graphical pipeline of your leads is displayed above the list.
- You can drill down on the pipeline by clicking the pipeline segment representing the lead stage that you want to zoom in on.
- For example, if you want to see leads at a stage of Rated, click on that section of the pipeline.
- The list of leads is filtered to show only leads at a Stage of Rated. You can toggle back to the full list of leads by clicking on the highlighted segment of the Lead pipeline.
- The pipeline graphic can be disabled from the Preferences tab. Please refer to Changing Preferences for more information.

5.13 Viewing Leads Assigned to You

- To find out which leads you are currently working on:
- From within My CRM, select the **Leads** tab.
- The list of leads currently assigned to you is displayed. If the list is long and difficult to work with, you can filter it using the filterbox on the right-hand side of the screen.

5.14 Deleting a Lead

- The ability to delete leads depends on your security profile. If your profile allows you to delete leads, a Delete action button is available on the Lead Summary page when you are in edit mode. Contact your System Administrator if you need to be able to delete leads but the button is not available to you.
- To delete a lead:
  - Find and open the lead you want to delete.
  - From the Lead Summary page, select the **Edit** button.
  - Click on the **Delete** button and then on the **Confirm Delete** button to delete the lead.
  - The lead record is deleted from the system.

6 Handling Opportunities

FAQs

Show me how to:

- Define what an opportunity is.
- Create a new opportunity.
- Understand the fields on the opportunity screen.
- Understand the opportunity status icons.
- Add information to an existing opportunity.
- Send a quotation from within the opportunity.
- Turn a quote into an order.
- Print an order.
- Progress opportunities through the sales cycle to closure.
- Find out what opportunities I am working on.
- Create an opportunity from other contexts.
- Delete and opportunity.
- Create quotes and orders outside the opportunity context.
- Find a quote.
- Find an order.

6.1 What is an Opportunity?

An Opportunity in CRM is a Sales Opportunity:

- Opportunity is a Lead which has
    - o Interest in our product
    - o Intent to buy our/competitor's product within a definite time frame

6.2 Opportunity Workflow Actions

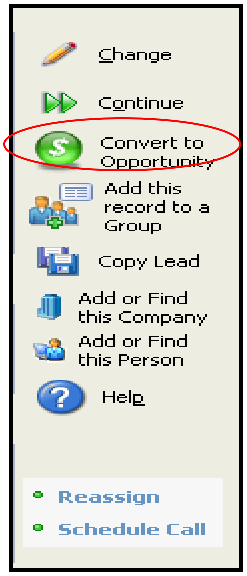
- Similar to the lead workflow, the opportunities section also has it's own workflow.
- Once we have mapped the lead to a contact, we can click on the "convert to opportunity" button on the lead summary page & convert the lead to an opportunity
- The opportunity workflow differs from LOB to LOB. Following are the major steps involved in workflows of respective LOBs:

1. **Workflow for Retail:**
   - Prospect meet
   - Initial Documents collected
   - File submitted to CPA
   - Closed Won
   - Closed Lost (Reasons for Opportunity Lost should be drop-down field & Mandatory)
2. **Workflow for Corporate Finance (SME / SME- Tiny Sector):**
   - Prospect meet
   - Initial Documents collected
   - Loan Sanctioned
   - Loan Disbursed
   - Closed Won
   - Closed Lost (Reasons for Opportunity Lost should be drop-down field & Mandatory)
3. **Workflow for Securities:**
   - Prospect meet
   - Initial Documents collected
   - Closed Won
   - Closed Lost (Reasons for Opportunity Lost should be drop-down field & Mandatory)

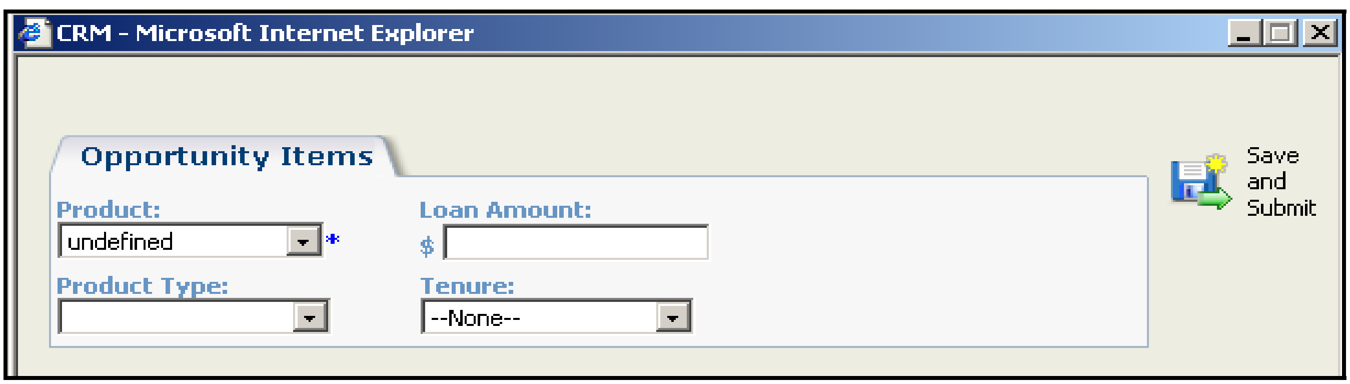
Opportunity **Workflow actions** would be governed by the selection of "Product Family". (As LOB is auto-populated based on Product Family)

6.3 Creating a New Opportunity:

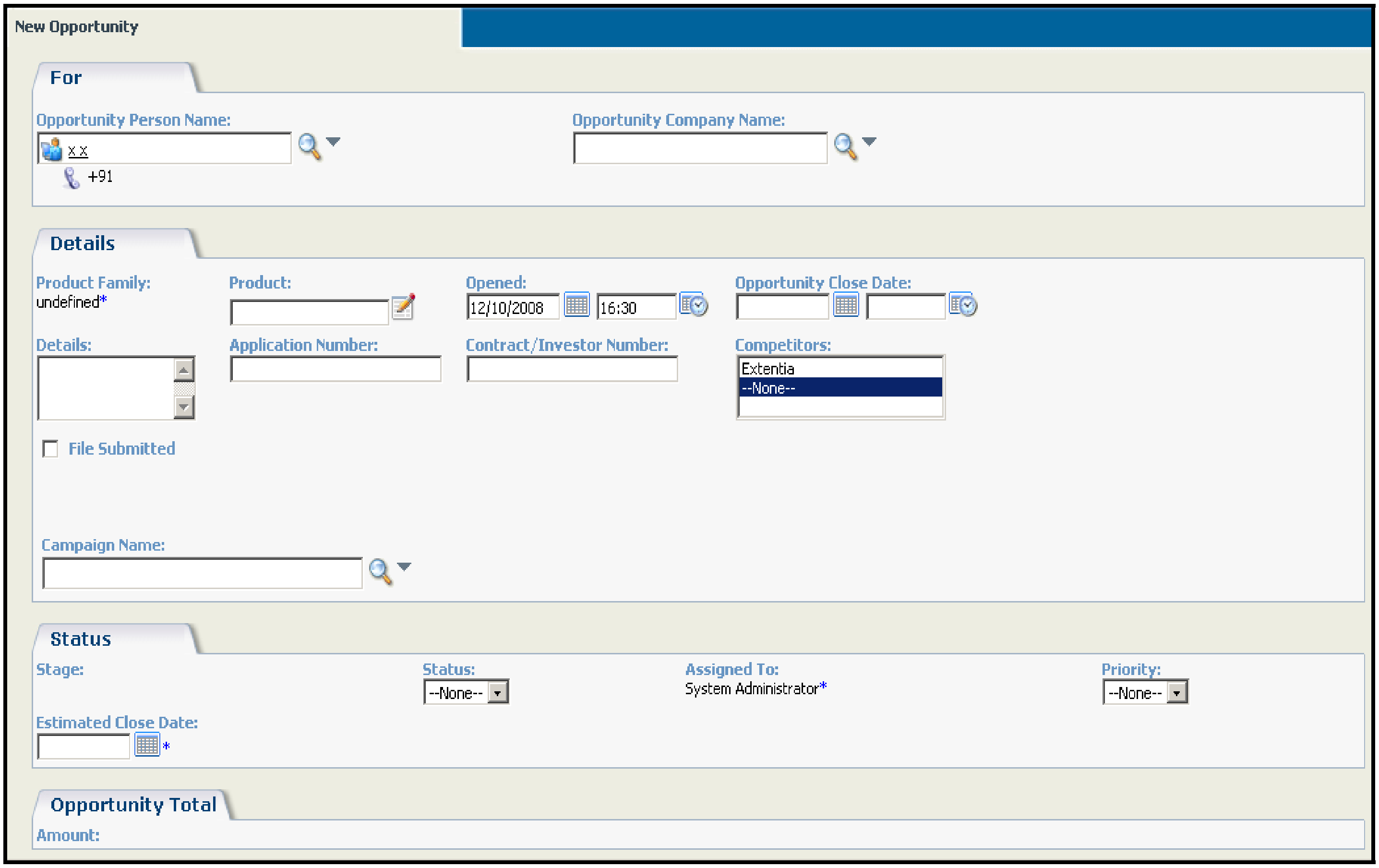
- Once we have mapped the lead to a contact, we can click on the "convert to opportunity" button on the lead summary page & convert the lead to an opportunity



- Now, a **pop-up** is shown, followed by a main **New Opportunity** Screen



Field	Description
Product	Product for which this opportunity exists
Product Type	Dependant Drop-down on Product For Example: • Product Type for Corporate Finance would be Secure / Non Secure
Loan Amount	Expected loan amount for the opportunity
Tenure	The tenure for which the loan is required. Eg 1 year, 3 years



Field	Description
Opportunity Person Name	Name of the person with whom the opportunity exists
Opportunity Company Name	Name of the Company with which the opportunity exists
Product Family	Auto populated from Lead screen
Details	Detailed description of the sales opportunity.
Opened	Date the opportunity was received. Defaults to today's date.
Opportunity Close Date	Actual date when the opportunity was closed. (only for closed opportunity)
Campaign Name	The Campaign Activity source of the opportunity (only available where Campaign Management is implemented).
Competitors	Multi-select
Competitors	Multi-select box for selecting competitors of this opportunity
Application number	Free text field for entering application number
Contract Number / Investor Number	Enter the Contract Number / Investor Number when opportunity stage is changed to Closed-Won

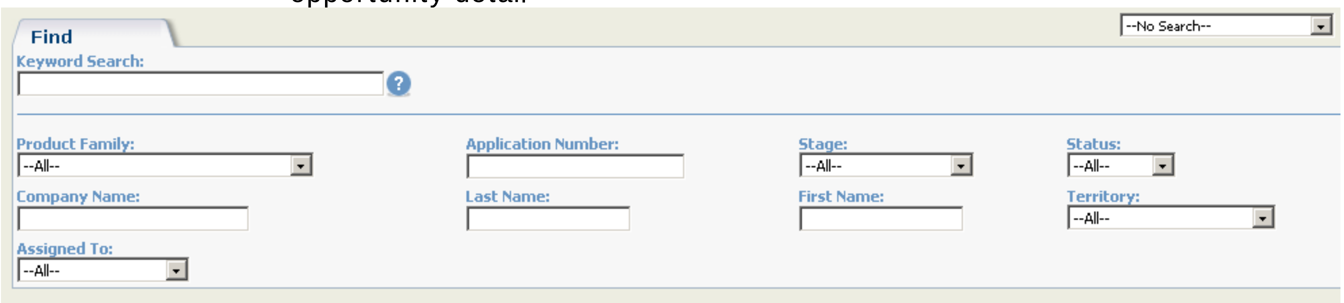
File Submitted	Is the application & documents file submitted to CPA
Product	This field is Auto populated from the Lead screen. There is an “Edit” button besides Product field to modify the product details
Stage	Stage of opportunity
Status	Stage of opportunity
Assigned to	Displays name of the person to whom this opportunity is assigned to.
Priority	Priority of opportunity
Estimated Close date	Estimated close date of opportunity
Amount	The actual total amount associated with this opportunity

- Enter the details in to the fields & click on **Save** button to save the opportunity.
- Now we can view the opportunity summary screen with the information entered by us.

6.4 Opportunity Search Screen

To search for an opportunity:

- Right-click on or hover over the **Find** menu button.
- Select **Opportunity** from the pop out list.
- Type in the search criteria, for example, **Customer Ref** and/or the **Company Name** and select the Find action button.
- Click on the **hypertext** link Status icon of the opportunity. This opens the 'file' of the selected opportunity and you now have access to all the opportunity detail



Field	Description
Keyword Search	Search an opportunity based on any keyword
Description	Search an opportunity based on Description
Customer Ref	Search an opportunity based on Customer Ref
Stage	Search an opportunity based on Stage
Status	Search an opportunity based on Status
Company Name	Search an opportunity based on Company Name
Last Name	Search an opportunity based on Last Name
First Name	Search an opportunity based on First Name
Assigned To	Search an opportunity based on Assigned To

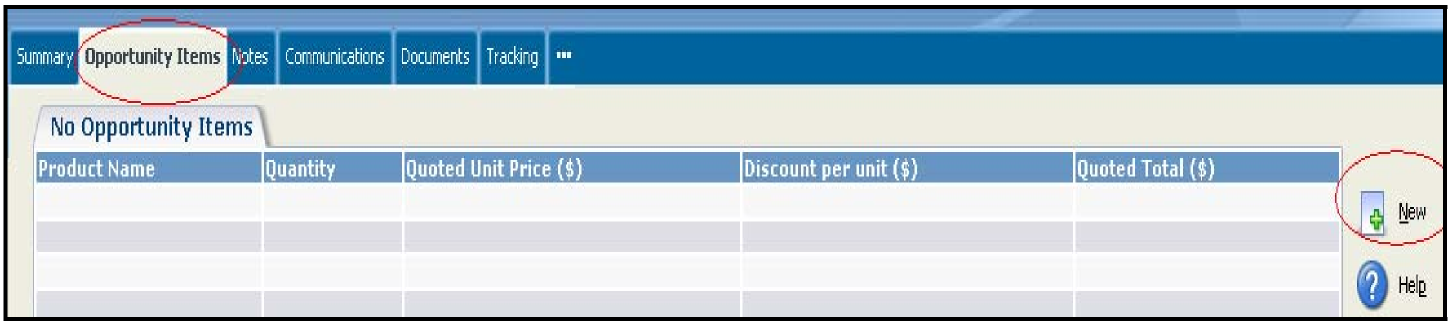
6.5 Adding Information to an Existing Opportunity

More information can be added to a particular opportunity while:

- Adding Product / Opportunity Item details to the opportunity
- Progressing an Opportunity

6.5.1 Products / Opportunity Item

- Click on **Opportunity Items** Tab
- Then click on New button to enter a new Opportunity Item

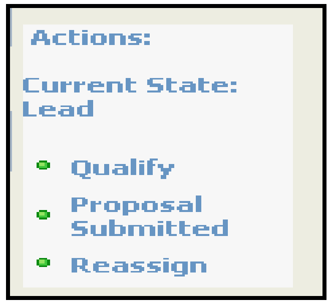


Opportunity Item Detail Box

Field	**Description**
Product	It is an Auto Populated dropdown with List of products in the Product Family selected in the opportunity detail screen
Amount	Total expected Amount from this opportunity item
Product Type	Dependant Drop-down on Product For Example: Product Type for Corporate Finance would be Secure / Non Secure .
Asset Value	Total asset value, of the asset which is being bought by customer using TCL's loan(This field will be visible only for Auto Loan/ Home Loan person)
Tenure (in months)	It will give loan tenure in months (Visible only for Retail / Corporate Finance person)

6.5.2 Progressing an Opportunity

- If your system has Opportunity Workflow enabled, you will see a number of workflow buttons on the right-hand side of the Opportunity Summary page.



- The workflow buttons available to you will vary depending on how the opportunity workflow has been set up and customized to suit your sales process.
- To progress the opportunity:
  - Select the **Qualify** workflow bullet.
  - When the **Progress Opportunity** page is displayed, complete the required fields and add additional information in the Tracking Note field.
  - Select the **Save** button. The Opportunity Summary page is displayed. All changes made to the Opportunity from the Progress Opportunity page can be viewed from the Opportunity Tracking tab. The Duration column on the Opportunity Tracking tab shows how long the opportunity has spent at each stage of the qualification process.
- The Duration takes into account the business calendar defined by the System Administrator.

6.6 Viewing the Sales Opportunity Pipeline

- To view a graphical representation of your Opportunities:
- Select the **My CRM** button, and click on the **Opportunities** tab.
- The Opportunities page is displayed which is made up of the following areas:
  - Graphical pipeline.
  - Statistics panel.
  - Opportunities list.
  - Filter box.

The information in the Statistics panel is summarized in the table below.

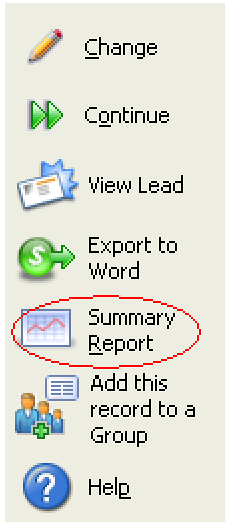
Field	Description
No. Oppos	Total number of opportunities for the current stage.
Forecast	Total Forecast value of opportunities for the current stage.
Weighted Forecast	Weighted Forecast value of opportunities for the current stage, that is, Forecast value multiplied by the % Certainty.
Average Value	Average Forecast value of opportunities for the current stage, that is Total Forecast value divided by the number of opportunities.
Average Certainty	Total % Certainty divided by the number of opportunities.
Weighted Average	Average Value multiplied by Average Certainty.

6.7 Drilling Down on the Pipeline

- Clicking on a section of the pipeline or on one of the stage hyperlinks underneath the pipeline drills down the Statistics panel to show statistics for the selected Stage in the pipeline.
- It also filters the list of Opportunities to show those in the selected Stage on the pipeline. The Stage selected on the pipeline is automatically set in the Filter Box.
- You can also drill down on the pipeline by changing the Opportunity Stage from the Filter Box.
- The pipeline graphic can also be viewed from the Opportunities tab of a company or person.

6.8 Running an Opportunity Report

- Opportunity Summary reports provide a quick overview of a particular sales opportunity. To generate a summary report for an opportunity:
  - Find and open the opportunity you want to generate the report for.
  - From the Opportunity Summary page, select the **Summary Report** button.
- The report is displayed in PDF format.



6.9 Finding Out what Opportunities I am working on

- To find out which opportunities you are currently working on, that is the ones currently assigned to you:
  - From within My CRM, select the Opportunities tab.
  - The list of opportunities currently assigned to you is displayed. If the list is long and difficult to work with, you can filter it using the filterbox on the right-hand side of the screen.

6.10 Creating an Opportunity from other Contexts

- As well as using the New menu button to create a new opportunity, you can also create new opportunities from within My CRM. To create a new opportunity from within My CRM:
  - Select the **Opportunities** tab and click on the **New Opportunity** action button.
  - The new opportunity gets assigned to you by default, but you can assign it to another user if you wish.
  - Fill in the opportunity details and select **Save**.
  - When you create quotes and orders outside the context of a company or opportunity, you may find it easier to track down the quote or order again by doing a search for the Quote or Order using the Find menu button or accessing your Recent List.

6.11 Deleting an Opportunity

- The ability to delete opportunities depends on your security profile. If your profile allows you to delete opportunities, a Delete action button is available on the Opportunity summary page when you are in edit mode. Contact your System
- Administrator if you need to be able to delete opportunities but the button is not available to you.
- To delete an opportunity:
  - Find and open the opportunity you want to delete.
  - From the Opportunity Summary page, select the **Edit** button.
  - Click on the **Delete** button and then on the **Confirm Delete** button to delete the opportunity.
  - The opportunity record is deleted from the system.

7 Sales Forecasting

FAQs

Show me how to:

- Define what sales forecasting is.
- Understand sales forecasting terminology.
- Create my own forecast.
- Submit a forecast to my manager.
- View forecasts I already submitted.
- Work with team forecasts.
- View other people's forecasts as an administrator.

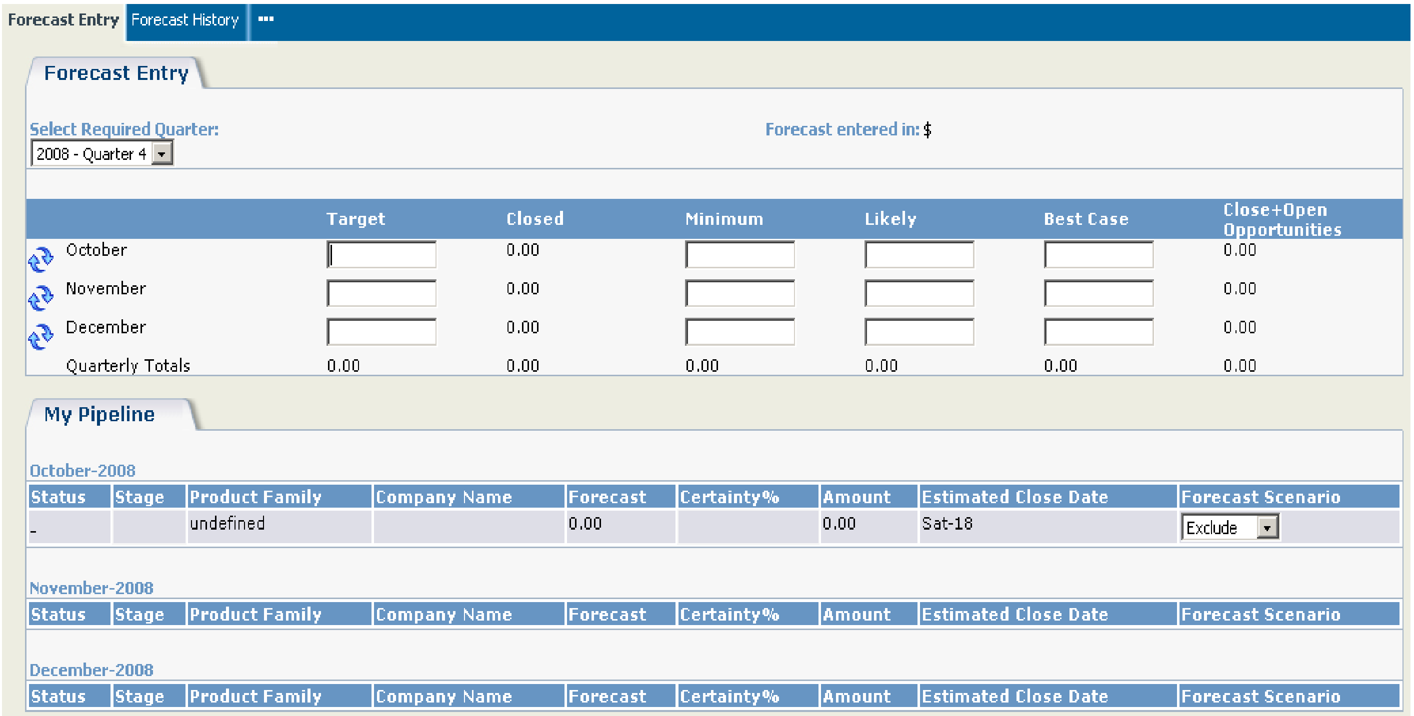
7.1 What is Sales Forecasting

Sales Forecasting functionality:

- Allows individual Sales Users to flag opportunities in their pipeline to indicate whether they should be included in their sales forecast.
- Allows individual Sales Users to enter forecasts using their opportunity pipeline as a default starting point.
- Allows Sales Managers to make their forecast based on their own personal pipeline (if they have one), as well as on the forecasts of their team.

7.2 Creating a Forecast for Yourself

- To work with forecasting, the System Administrator must give you rights to access the Forecasts tab. A quarterly forecast is based on opportunities already in the system, where the Opportunity Close By date falls into the quarter you are preparing your forecast for.
- To prepare a forecast for Q4 2006 (October to December):
    - Select the **My CRM | Forecasts** tab to display your list of existing forecasts.
    - If there is no entry in the list yet for Q4 2006, select the **New Forecast** button. The Forecast Entry page is displayed, defaulting to the current quarter.
    - Set the **Select Required Quarter** field to the quarter you want to enter a forecast for. The Forecast Entry page is refreshed to show the months in the selected quarter. Opportunities are listed under the month in which their Close By date falls.
    - The Forecast Scenario for every opportunity is set by default to Exclude. This means that none of the Opportunity Forecast values have been included in the forecast figures yet.
    - The Weighted Forecast is the Forecast figure multiplied by the Certainty %.
    - Regardless of what currency the forecast figures were entered in, they are converted to the Forecast Currency specified in the top Summary panel. The forecast currency is specified by the System Administrator for each user. If the user sets their preferred currency to a different currency within My CRM | Preferences, the forecast is still in the defined forecast currency. However, the user can view the totals in the top Summary panel in their preferred currency as well.
    - The Pipeline figure in the Forecast Summary page is the total weighted forecast by month of everything in the pipeline, regardless of the scenario.
    - Update the Forecast Scenarios against the opportunities that you want included in the forecast. If you do not want to include an opportunity, leave the scenario set to Exclude.
    - Commit indicates this business will definitely close. The weighted forecast figure will be included in the Commit, Likely, and Best Case fields.
    - When you update the Forecast Scenarios, select the button against each month to display the effect the scenario has on your forecast in the Forecast Summary panel.
    - Update the Forecast Scenarios against the remaining opportunities that you want to include in the forecast.
    - Likely indicates that the business will probably close. The weighted forecast figure will be included in the
    - Likely and Best Case fields.
    - Best Case indicates that the business may close. The weighted forecast figure will be included in the Best Case field only.
    - If you have the appropriate rights, you can manually override the forecast figures in the Forecast Summary panel. To do this, select the Save button to save the overrides you have made. You can also add your monthly sales quota for comparison against the forecast figures.
    - Select the **Continue** button to return to the Forecast list.
    - Select the **New Forecast** button to add a forecast for another quarter and work through the steps described above. Otherwise, to go back and edit the forecast you have been working on, click on the hyperlink of the forecast in the Forecast list.



Field	Modification
Target	The sales target that a Sales User has for a month, quarter, or year. Entered by their manager and may be overridden (depending on system settings) by the user themselves.
Closed	How much amount of opportunities were successfully closed
Commit	Minimum Committed Forecast
Likely	Likely Forecast
Best Case	Best Case Forecast
Close Won +Open	The list of opportunities that are currently assigned to a Sales User (in My CRM | Opportunities).
Company name	Name of the company / person with whom the opportunity exists
Amount	This field is the same one from that of the Opportunity summary screen. Denotes approximate amount of the forecasted opportunity.
Contact Name	

7.3 Submitting a Forecast

To submit your forecast to your manager:

- Select the **My CRM | Forecasts** tab, and click on the hyperlink of the quarterly forecast you want to submit. The Forecast Entry page is displayed.
- Make any final changes you need to, and select the **Save And Submit** button. Clicking on the Save And Submit button:
  - o Makes your forecast available to your "roll-up" manager. Prior to clicking on the Save And Submit button, the details of your forecast are not available to your manager.
  - o Adds your forecast to the Forecast History tab to give you a static snapshot in time of your submitted forecast.

7.4 Viewing Past Submitted Forecasts

To view a past submitted forecast:

- Select the **My CRM | Forecasts** tab, and click on the hyperlink for the quarterly forecast that you want to review.
- The Forecast Entry page is displayed.
- Click on the **Forecast History** tab. A list of all submitted forecasts for the selected quarter is displayed. There may be several if you are required to submit a forecast on, for example, a weekly basis.
- Click on the hyperlink of the Forecast History you want to review. The Forecast Entry page is displayed in randomly mode. You can click on the hyperlink of an individual opportunity to view the details of the opportunity as they stood at the time of submitting the forecast. This page is opened in a new browser window, and it can be customized by the System Administrator to show more or different information on the selected opportunity.
- Select the **Continue** button to return to the Forecast History list.

7.5 Working with your Team's Forecasts

- Sales Managers have exactly the same forecast tab as other users, except that they see their teams' (users who 'roll up' to them) submitted forecasts in addition to their own forecast.
- To view a team's forecasting information:
  - Select the **My CRM | Forecasts** tab.
  - Click on the **New Forecast** button to create a new forecast.
  - Select the **Quarter** and **Year** of the forecast, for example, 2006 Quarter 4. Your own forecast is displayed within the My Pipeline panel, and your team's forecasts are displayed in the My Direct Reports panel.
  - To review the detail of an individual's forecast and enter the manager's assessment of the salesperson's Commit, Likely, and Best Case, click on the **hyperlink** of the user. The Forecast Detail Screen for the selected user is displayed. Sales managers can enter their own assessment in the top Forecast Entry panel.
  - Select the **Save** button to update the manager's assessment.
  - Select the **Back** button to return to your own Forecast Detail screen. Your own assessment of the sales person's forecast is updated in the My Assessment panel.
  - Click on the magnifying glass icons next to the months to update the overall forecast.
  - Make any final manual changes required to the forecast figures on the top panel.
  - Select the **Save And Submit** button to submit the full team's forecast. This includes any opportunities the manager is personally working on.
  - Selecting the Save And Submit button creates a "snapshot in time" in the Forecast History tab, in the same way as when an individual Sales User submits their own forecast.

7.6 Administrator Access to Forecasts

- A user with full System Administrator rights can access and submit a forecast for other Sales Users from My CRM | Administrator Access to Forecasts
- To do this, the administrator should log on with their own ID and password, then change the user name in the context area of My CRM. The administrator can then review, change, and submit that user's forecast as if it was their own.
- If the administrator moves away from this screen and then uses, for example, the back button to return to the screen, it will be in read-only mode.

8 Dashboard

FAQs

Show me how to:

- Understand what to use the Dashboard for.
- Set up a new Dashboard.
- Change content directly on the Dashboard page.
- Edit Dashboard Details.
- Modify Dashboard content.
- Add saved searches to a Dashboard.
- Add favorite reports to a Dashboard.
- Add report charts to a Dashboard.
- Set up a Company Dashboard.
- Modify the content of the Company Dashboard.

8.1 What is a Dashboard?

- A Dashboard is a customizable page that contains information most relevant to your daily work. For example:
  - A snapshot of companies you most often work with.
  - A list of high priority cases assigned to you.
  - Outstanding appointments.
  - A list of recently viewed leads.
  - A pie chart of opportunities by territory.
- You can define:
  - What information you want on your page based on a predefined list of content.
  - A preference for displaying the Dashboard tab as the first page you see after logging on.
  - More than one dashboard in CRM.
  - Your default dashboard.

8.2 Setting up a New Dashboard

You can create a new dashboard with all the content you need for your day-to-day work.
To create a new dashboard:

- Select **My CRM | Dashboard**.
- If the System Administrator has not set up a standard dashboard, then the **Dashboard Details** page is displayed.
- If a standard dashboard has been set up, then the Dashboard page displays the content from the **default dashboard**. If this is the case, click on the **New Dashboard** button to create a new dashboard.
- If multiple dashboards already exist, but no default has been set, then the system displays the first dashboard in the drop-down list. If this is the case, click on the **New Dashboard** button to create a new dashboard.
- Enter a **name** for the new dashboard. If a dashboard with the same name already exists, a warning prompt is displayed, however you can still add a new dashboard with the same name as an existing dashboard.
- Select the **Set As Default** check box to make this the default dashboard. The **Set As Mobile Dashboard** check box makes the dashboard available on mobile devices.
- Click on the **Continue** button. The Dashboard Content page is displayed.
- The Dashboard Content page is divided into the **Available Content** panel and the **Selected Content** panel.
- Use the **Add** button next to the item in the Available Content list to add it to the Selected Content panel.
- Use the **Filter By** drop-down list to narrow down the list of all content to view content by area, for example,
- all content related to Opportunities.
- Use the **Blocks radio buttons** to filter the list of all content to view content by **narrow** or **wide** widths. The
- System Administrator is responsible for defining the width of the content.
- Select and add the content to the Selected Content panel.
- To remove a selected content item, highlight the item in the Narrow or Wide content list, and click on the
- **Remove** button to the right-hand side of the Narrow or Wide content list.
- You can also remove a selected content item by clicking on the **Remove** button next to the item in the Available Content panel.
- To change the order of a selected content item, highlight the item, and click on the **up** and **down arrows** to the right-hand side of the Narrow or Wide content list.
- **Narrow** columns are displayed by default on the left-hand side of the Dashboard page. You can switch this by selecting the Right radio button at the top of the Select Content panel. If only wide content is selected, it is displayed spanning the whole width of the Dashboard page.
- The **double arrows** moves a content item to the top or bottom of the list of Selected Content.
- Use the **Clear** button to clear all the selected content in the Narrow or Wide content list.
- Click on the **Save** button. The new dashboard is displayed.
- The **Dashboard toolbar** is displayed in the top left-hand side of the Dashboard page, showing the dashboard you created in the drop-down list.
- You can use the Dashboard toolbar to set up another dashboard, modify the existing dashboard, and switch between existing dashboards. You can use the **Print** button to print your dashboard.

- **Note**: You can set the Dashboard page to be the first page you see when you logon to CRM by selecting Dashboard from the Log Me Into field on the My CRM | Preferences tab.

8.3 Changing Content Directly from the Dashboard Page

- You can minimize, restore, or remove dashboard content by clicking on the **icons** in the top right-hand corner of the content panel.
- You can change the columns that appear on content panels, and reduce the size of wide content panels, where you see the **Customize Columns** icon in the top right-hand corner of the content panel.
- **Note**: If you remove columns on a content panel, they will stay hidden, even if you remove the entire dashboard content panel, and replace the content panel later on. To unhide columns click on the Customize Columns icon and check the boxes next to the hidden columns.
- When a list of content is longer than 10 records, or longer than the Grid Size set in the Preferences tab, then a
- **View All** hyperlink is displayed in the bottom right-hand corner of the panel. Click on this hyperlink to view all the records of this content panel in a new browser window.
- When a Calendar or Tasks list is longer than 10 records, or longer than the Grid size set in the Preferences tab, then a **View Calendar** hyperlink is displayed. The hyperlink takes you to the Calendar tab.

8.4 Editing Dashboard Details

- Click on the **Edit Dashboard Details** button to change the dashboard name, or to change the default setting.
- The **Save** button returns you to the Dashboard page. The **Continue** button displays the Dashboard Content page.
- If the dashboard you are editing is a standard dashboard, which you have modified, a **Reset Standard Dashboard** button is displayed on the Edit Dashboard Details page. Selecting this button restores the content of the standard dashboard.
- **Note**: Changes made to Standard Dashboards do not affect the standard dashboards of other users. When you modify a standard dashboard, you are effectively making your own personal version of the standard dashboard.
- You can also delete a dashboard from the Dashboard Details page, by clicking on the **Delete** button.
- **Note**: You can only change the name of a dashboard, or delete a dashboard that you have created. You cannot change the dashboard name of or delete a standard dashboard created by your System Administrator.

8.5 Modifying Dashboard Content

To modify the content of an existing dashboard:

- Select **My CRM | Dashboard**.
- Select the dashboard you want to modify from the drop-down list at the top of the page.
- Click on the **Modify Dashboard** icon. The Dashboard Content page is displayed.
- Modify the content.
- Select the **Save** button. The modified dashboard is displayed.

8.6 Adding Saved Searches to a Dashboard

- All users can set up saved searches. Saved Searches can then be selected from the list of Available Content to display on a dashboard.
- To make a saved search list available on the dashboard:
  - Set up a saved search, for example, all companies in the city of New York.
  - Select **My CRM | Dashboard**, and click on the **Modify Dashboard** button. The Dashboard Content page is displayed.
  - Select the **Saved Search** category from the Filter By drop-down list. The saved search you created is displayed in the list of Available Content.
  - Click on the **Add** button next to the saved search you created.
  - You can also select Saved Search Summaries from the Available Content list. This displays a count of the number of records in each of your saved search.
  - Select the **Save** button. The dashboard page is displayed, showing the Saved Search list you created.

8.7 Adding Favorite Reports to a Dashboard

- All users with access to the Reports menu button, can select reports they run frequently as "favorite" reports. These reports can be run from the dashboard if the Favorite Reports content item is selected.
- To run a favorite report from the dashboard:
  - Make sure you have at least one report set as a Favorite report.
  - Select **My CRM | Dashboard**, and click on the **Modify Dashboard** button.
  - The Dashboard Content page is displayed.
  - Select the **Other** category from the Filter By drop-down list.
  - Click on the **Add** button next to the Favorite Reports content item.
  - Select the **Save** button. The dashboard page is displayed. The Favorite Reports content panel is displayed on the dashboard with all of your favorite reports.
  - Click on the **hyperlink** of the report you want to run. The report output is displayed in a new browser window.

8.8 Adding Report Charts to a Dashboard

- Users with Information Manager security rights can create new reports and modify existing reports. If the Available
- On Dashboard check box is selected in the Chart Options panel of the Report Options, then the chart is displayed for selection by the user in the Report Charts category on the Dashboard Content page.
- To add a report chart to the Dashboard Content page:
  - Edit an existing report, and navigate to the **Chart Options** panel on the Report Options
  - Check the **Available On Dashboard** check box on the Chart Options panel, and complete the other Chart Options fields.
  - **Note**: The Available On Dashboard check box is not available on the Chart Options panel of Historical reports.
  - Select the **Save** button.
  - Select **My CRM | Dashboard**, and click on the **Modify Dashboard** button. The Dashboard Content page is displayed.
  - Select the **Report Charts** category from the Filter By drop-down list.
  - Click on the **Add** button next to the Report chart you added. **Note**: If the Report Chart comes from a report with multiple saved searches, then a Report chart panel is available for selection for each saved search and for the full report.
  - Select the **Save** button. The dashboard page is displayed. The report chart is displayed on the dashboard. You can click on the report chart on the dashboard to view the full report in a new window.
- **Note:** Hyperlinking is not available on "standalone" chart content panels. These can be identified in the content lists by the prefix "Chart".

8.9 Setting up a Company Dashboard

- The Dashboard tab within the Company context can be used to display a management overview of customer information. Once a Company dashboard is set up, the same dashboard will be available from the Company context page of all companies.
- To set up a company dashboard:
  - Within the context of a company, select the **Dashboard** tab.
  - If the System Administrator has not set up a standard company dashboard, then the **Dashboard Content** page is displayed.
  - If a standard company dashboard has been set up, then the Dashboard page is displayed, showing the content from the standard company dashboard. If this is the case, click on the **Modify Dashboard** button to review the existing content.
  - In the Available Content panel, click on the Add button beside the content panels you want to add to the dashboard. The selected content is listed in the Selected Content list.
  - Click on the **Save** button. The Company Dashboard is displayed.
  - Select the **Reset Standard Dashboard** button to revert to the Standard Company Dashboard, set up by the System Administrator.

8.10 Modifying the Content of the Company Dashboard

- To modify the content of a company dashboard:
  - Within the context of a company, select the **Dashboard** tab. The Dashboard page is displayed
  - Click on the **Modify Dashboard** button. The Dashboard Content page is displayed.
  - User Requirement: Info Manager Administration Rights
  - Make the changes you require.
  - Click on the **Save** button. The Company Dashboard page is displayed with the changes you made.

9 Managing Documents

FAQs

Show me how to:

- Download the CRM Plugin.
- Carry out a mail merge.
- Merge a local template.
- Carry out a mail merge to multiple contacts.
- Track documents on the Documents tab.
- Retrieve a merged document from the Documents tab.
- Add a document to the Documents tab.
- Use document drag and drop.
- Link e-mail correspondence to a customer.
- Drop a document into the Documents tab.
- Shared Documents.
- Access documents in Shared Documents.
- Filter Shared Documents.
- Add documents to the Shared Documents tab.
- Edit documents in the Shared Documents tab.

9.1 Downloading the CRM Plugin

- The plugin enables connectivity to MS Word when performing a mail merge. You also need the plugin to enable the Document Drop feature.
- The first time you encounter one of the features requiring the plugin (for example, the Document Drop icon in your Calendar), you are prompted to download a plugin.
- Follow the instructions provided on-screen. You only need to do this once. If you receive an upgrade, or change machines, you are prompted to download the plugin.

9.2 Shared and Local Templates

- You can create mail merge documents with Shared templates or with templates you have saved locally. Shared templates are stored on the CRM server and are available to all users.
- Local templates are documents that you have saved on your own machine and are therefore available exclusively to you. For details of how to perform mail merges using Shared and Local templates, refer to Carrying out a Mail Merge.

9.3 Carrying out a Mail Merge

To merge an existing template with company and person details:

- **Find** the prospect you want to send the letter to.
- Click on the **hypertext** link of the person so that their name appears in the context area of the screen.
- Right-click on or hover over the **New** menu button, and select **Document**. For this example, you can leave the default settings as they appear on the Choose Letter Options page, however each option is explained in more detail in the following table.

Option	Description
Merge With A Shared Template	Allows you to choose from existing template documents set up by your System Administrator. These should include all the standard merge fields used in your customer correspondence.
Merge With A Local Template	Allows you to choose from existing template documents that you have saved locally. These should include all the standard merge fields used in your customer correspondence.
Create A New Local Template	Opens a blank Word document. You can create a new local template using this blank document and save it locally so that you can reused it when you need it.
Create Merge Document <Document Name>	The system can be configured to give you access to an additional option, which allows you to merge a specific shared template at a certain point in the Opportunity, Lead, Case or Solutions workflow. Select this option to merge the template.
Edit A Shared Template Then Merge It	Available only when you are merging a document with a list of contacts. Please refer to Working with Lists. Enables you to edit the template before you merge it.
Edit A Local Template Then Merge It	Available only when you are merging a document with a list of contacts. Please refer to Working with Lists. Enables you to edit the template before you merge it.
Create Communication	A completed communication record is created. The communication record also includes a link to the merged document so that it can be viewed from the communication record in the future.

- Select the **Continue** button. A list of Shared templates is displayed.
- Select the hypertext link of the template to be used. The merged document is displayed and can be edited and printed.
- Return to **CRM**. You can leave the merge document open. It shuts down automatically when all the merge steps are completed. If you decide to close the document at this point, you must first save it. The Communications
- Details page is displayed.
- Add a brief description in the **Details** area of the communication.
- Select the **Save** button.

- A communication record is created to record that a letter was sent out, forming part of the customer's interaction history. The merged document can be viewed as an attachment on the communication record.
- It can also be viewed and edited from the Documents tab.

9.4 Merging a Local Template

To merge a local template:

- Find the prospect you want to send the letter to.
- Right-click on or hover over the **New** menu button, and select **Document**. The Choose Letter Options page is displayed.
- Select the **Merge With a Local Template** option and click on the Continue button. You can leave the rest of the options as they appear by default. The Open file dialog box is displayed.
- Navigate to the location where you have saved your personal templates.
- Select the template to be used.
- Click on the **Open** button. The merged document is displayed and can be edited and printed.
- Return to CRM. You can leave the merge document open. It shuts down automatically when all the merge steps are completed. The Communications Details page is displayed.
- Add a brief description in the Details area of the communication.
- Select the **Save** button.

9.5 Carrying out a Mail Merge to Multiple Contacts

You can create a merged document for all contacts contained in a search list, saved search, or a group. To carry out a mail merge to multiple contacts:

- Return a search list by either performing a standard search or selecting a saved search from the Saved Search drop-down list at the top of the screen. Refer to Using an Existing Saved Search for more information.
- Select the **New Document** action button. The Choose Letter Options page is displayed.
- Select the **Merge With A Shared Template** option or the **Merge With A Local Template** option.
- Select **Continue** and:
    - Select from a list of shared templates, which is displayed if you are merging a Shared template.
    - OR
    - Navigate to your locally saved file from the Open File dialog box, which displays if you are merging a Local template.
- The merged document is displayed and can be edited and printed.
- Return to CRM. You can leave the merged document open. It shuts down automatically when all the merge steps are completed. The Communication Details page is displayed.
- Add a brief description in the Details area of the communication.
- Select the **Save** button.
- A communication record is created against all of the contacts on your list. A link to the document template is maintained in the communication record.

9.6 Tracking Documents in the Documents Tab

- Managing documents relating to your customers, suppliers, partners, and prospects is an integral part of managing your whole relationship with them.
- The Documents tab enables you to:
  - Link copies of merged documents generated through the system, such as letters and e-mails, to a customer.
  - Retrieve these documents at a later date from within the company or person context for viewing and editing.
  - Link copies of any document generated outside of the system to a company, person, sales opportunity, case, or solution.
- The Documents tab is available within the context of a:
  - Company
  - Person
  - Opportunity
  - Case
  - Solution
- Documents in the Opportunity or Case documents tabs are visible in the Company and Person Library tabs. Documents in the Person Documents tab are also visible in the Company Documents tab (unless the person is not linked to a company).

9.7 Retrieving a Merged Document from the Documents Tab

- If you sent out a letter to a customer using the Merge Document functionality, setting the Create Communication and Save Document letter options to Yes in the process, a copy of the merged document is automatically attached to the communication record and stored in the Documents tab.
- To view a copy of the document you can:
  - Open the communication record and click on the View Attachment button.
  - Or
  - You can retrieve the document from the Documents tab as follows:
    - Find the customer you sent the letter to.
    - Click on the **hypertext** link of the person so that their name appears in the context area of the screen.
    - Select the **Documents** tab. A list of all document entries for the person is displayed.
    - Click on the **hypertext** link of the Documents entry you wish to review. The Document Details page is displayed.
    - The View Attachment button works the same way as in the Communication Details page. Clicking on it opens up the document in a new browser window.
    - Select the **Edit Attachment** button to view and edit the document in Word.
    - **Note:** If the Edit Attachment button is available, it indicates that the document is a Draft document. The Edit button is not available for Final documents.
    - Make the changes to the document. If you want the Documents entry to show the updated document, save the changes in Word and return to CRM. Note that the Edit Attachment button has additional instructions to save changes made within the document and save the whole document entry.
    - Select the **Save** button.
    - You are returned to the list of documents entries. The attachment is updated in the Documents tab and in the communication record linked to the attachment.

9.8 Add a Document to the Documents Tab

- You receive a "Request for Information" from a prospective customer. At present, you have the document saved on your local hard drive. To link this document to the prospect and make it available for others to look at, you can create a new library entry within the context of the prospect company.
- To add the document to the company Documents tab tab:
  - **Find** the company.
  - Click on the **hypertext** link of the company.
  - Select the **Documents** tab. A list of existing Documents entries for the company is displayed.
  - Select the **New** button. The Document Details panel is displayed.
  - Fill in the details and add a brief description of the document.
  - Select the **Create Communication** check box if you want a new completed communication record to be automatically created when the Documents entry is saved.
  - Click on the **Browse** button to select the file from its current location.
  - Select the **Save** button.
- The Documents list displays the new library entry. If you selected the Create Communication check box, you also see the completed communication record on the company Communications tab.

9.9 Document Drag and Drop

- The drag-and-drop feature provides a short cut for linking documents, e-mails, or any type of file from another application to customer data in CRM. Also, if the document is dropped onto the icon in any of the communication lists, a new communication record is created. The document is saved as an attachment to the communication.
- The Document Drop icon is available in:
  - My CRM Calendar tab.
  - Team CRM Calendar tab.
  - Company Communications tab.
  - Person Communications tab.
  - Lead Communications tab.
  - Opportunity Communications tab.
  - Case Communications tab.
  - Solution Communications tab.
  - Any Documents tab.

9.10 Linking E-mail Correspondence to a Customer

- You have just received an e-mail from a customer regarding a new project you are working on. This forms a vital part of the customer interaction history.
- To link this correspondence to the customer:
  - **Find** the customer.
  - Click on the **hypertext** link of the person.
  - Select the **Communications** tab. A list of communications with this person is displayed. You will also notice the Document Drop icon on the right-hand side of the page.
  - You can drop the e-mail onto the icon either by: tiling the windows on your desktop and, using the mouse, dragging the e-mail onto the Document Drop icon; or by copying the e-mail record, and placing the mouse over the Document Drop icon, right-clicking and select **Paste**. The Enter New Task page is displayed.
  - The Action type is automatically set to E-mail In. Enter the rest of the details and select the **Save** button.
- The new communication is displayed in the Communications list of the company. If you click on the E-mail icon of the communication, the Communication Details page is displayed. Select the View Attachment button to review the e-mail.
- **Note:** If you are working with CRM from within Outlook, the steps described above are even simpler.
- Just right-click on your Inbox in Outlook, select Open In New Window, and drag and drop e-mails directly onto the document drop icon in CRM within Outlook.
- Remember, other options for linking e-mail correspondence to customer records in CRM include:
  - **Outlook Integration**. If you have Outlook Integration installed on your system, you can use the File E-mail button from Outlook to file an inbound e-mail communication with the customer record in CRM. Please refer to MS Outlook Integration for more information.
  - **E-mail Management**. If E-mail Management is set up on your system, inbound e-mails can automatically get filed against the matching person or company record. Please refer to Filing Inbound and Outbound E-mails for more information.

9.11 Dropping a Document into the Documents Tab

To drag and drop a document into the Documents tab:

- **Find** the company.
- Click on the **hypertext** link of the company.
- Select the **Documents** tab. A list of existing Documents entries for the company is displayed.
- Tile your CRM and Browser windows.
- Click and drag the document from the Explorer window onto the **Document Drop** icon. You can also right-click on the Document Drop icon and click on Select a File instead of dragging from another window. The Documents Details panel is displayed.
- Enter the document details and click on the **Save** button. The Documents list displays the new documents entry.

9.12 Shared Documents

- All users have access to the Shared Documents tab. This tab stores corporate documents that you may need quick access to on a daily basis. However, you may not have access to all documents within the Documents tab.
- You need to be a System Administrator or an Info Manager to upload documents to the Documents tab or to modify documents already uploaded.

9.13 Accessing Documents in Shared Documents

To access documents in Shared Documents:

- From within **My CRM**, select the **Shared Documents** tab. A list of documents is displayed.
- Click on a document **hypertext** link. The document Details screen is displayed.
- Select the **View Document** button to open the document and view it.

9.14 Filtering Shared Documents

- If the default list of documents in the Shared Documents tab is long and difficult to manage, you can use the filter box on the right-hand side of the screen to filter the list according to a number of criteria.
- For example, you may need to quickly locate a sales letter but are unsure which one exactly.
- To filter the Shared Documents list:
- Select **Letter** from the **Type** drop-down list, for example.
- Select the **Filter** action button. When you do this only documents of type Letter are displayed on the list, which makes it easy to find the letter you need.

9.15 Adding Documents to the Shared Documents Tab

Only Administrators and Info Managers have rights to upload documents to the Shared Documents tab or to modify documents already uploaded.
To upload a document:

- From within **My CRM**, select the **Shared Documents** tab and select the **New** action button.
- Specify the type of document you are about to upload and other details, such as which teams can view it and whether it is associated with a particular entity.
- Use the **Browse** button to find the document you want to upload to Shared Documents.
- Click on the **Save** button to upload the document. The document becomes available from the Shared Documents tab to all users in the selected team.

9.16 Editing Documents in the Shared Documents Tab

Only Administrators and Info Managers have rights to modify documents already uploaded.
To edit documents in the Shared Documents tab:

- From within **My CRM**, select the **Shared Documents** tab.
- Locate the document you wish to edit and click on the hyperlink text to open it.
- Click on the **View Attachment** button to open up the attached document, and **Save** it locally.
- **Note:** If the Edit Attachment button is available, it indicates that the document is a Draft document so you can make changes directly to the document and save it. The Edit button is not available for Final documents.
- Make the document changes you require and **Save** them.
- Ensuring that you make a note of the document details, return to CRM and delete the existing document using the Delete button. You are returned to the list of documents.
- Select the New button to begin uploading the updated document.
- Fill in the document details on the Details screen, and navigate to the updated document, which you saved locally, using the Browse button.
- Select Save. Users can now access the updated document from within My CRM | Shared Documents.

10 Adding / Changing Information

FAQs

Show me how to:

- Use the New menu button.
- Understand the company fields.
- Understand the person fields.
- Understand the address fields.
- Understand the phone and e-mail fields.
- Understand the person phone details fields.
- Understand how territories work.
- Add a new company, person, and address.
- Add a person to an existing company.
- Add an address to an existing company.
- Add a person unlinked to a company.
- Interpret validation errors.
- Change company details.
- Change person details.
- Change address details.
- Update a phone number.
- Assign a different address to a person than the company address.
- Add a private address to a person.
- Add a company that has multiple sites.
- Add a company with multiple subsidiaries.
- Assign an in-house project team to a company.
- Add notes to a company or a person.
- Editing Company Notes.
- Merge two companies.
- Merge two people.
- Assign an unlinked person to a company.
- Delete company or person records.

10.1 Validation Errors

- When you add a record and click on the Save button, the page may be displayed with a message "Validation Errors -
- Please correct highlighted entries". When this is the case, look for any fields with a ? or an X displayed to the right of them.
- You must enter information in fields containing a ?. Entries that are incorrect, such as dates in the wrong format, are highlighted with an X.
- Fill in the required fields, correct the entries in the wrong format, and select the Save button.

10.2 Territory Management

- Each of the main types of data in CRM (Company, People, Communications, Leads, Opportunities, and Cases) have a field called Territory.
- Your System Administrator can set up different hierarchical territories—geographically, by product, or by another criteria—which reflect your organization's data security needs. Each user is assigned a "home" territory, and security access rights are applied across the territories.
- For example, your organization has sales teams based in Europe, Asia, and the USA. It is a requirement that the sales people can view all companies, but they can only insert and change the companies in their own "home" territory or hierarchically subordinated to their home territory.
- When inserting new data, you can select a territory to assign the record to from the Territory list. The territories available to you in the list are defined by your System Administrator. If you do not select a territory, the record is automatically assigned a territory according to the territory security management set up by your System Administrator and a set of system rules.
- If no territories are defined by your System Administrator, you can ignore this field. All records are then automatically assigned to the highest level territory called Worldwide.
- The Territory field appears in most lists and filter boxes within CRM. If your implementation makes use of territories, all areas of the system (including Reporting and Groups) are affected by it.
- For example, if you do not have rights to view data in the USA sales territory, no USA sales territory data is displayed on a company list report run by you.

10.3 Changing Company Details

- Open the company you want to make changes to, and click on the **Summary** tab.
- Select the **Change** button.
- Make the changes to the company information.
- Select the **Save** button.

10.4 Changing Company Address Details

- Open the company you want to make changes to, and click on the **Summary** tab.
- Select the **Addresses** tab.
- Click on the **hypertext** link of the address you want to change.
- Type the new address. Note that the **Set As Default** check box should remain selected if this address is the new principal address for the company. Leaving this check box selected also means that this is the default address for any new people who are added to the company.
- Select the **Save** button. Note that any people linked to this address are also affected by the change.

10.5 Changing Person Details

- Open the person context of the person you want to make changes to, and click on the **Summary** tab.
- Select the **Change** button.
- Make the changes to the person's details and select the **Save** button. Note that the **Set As Default** check box should remain selected if this person is still the principal contact person for the company.

10.6 Adding a New Address to an Existing Company

- Open the company you want to make changes to, and click on the **Addresses** tab.
- Select the **New Address** button.
- Enter the details of the new address, or click on the **Select An Address To Update Or Copy** icon to base the new address on an existing address. The Set As Default check box can be selected to make this address the principal company address.
- Select the **Save** button.

10.7 Adding a New Person to an Existing Company

- Open the company you want to make changes to, and click on the **Person** tab.
- Select the **People** tab.
- Select the **New Person** button. The Person duplicate find page is displayed.
- Type the first few letters of the Person's **last name**, and select the **Enter Person Details** button. The system searches for possible duplicate person names in the system. For more information, please refer to Preventing Duplicate Entries. If no potential duplicate person is found, the New Person page is displayed.
- Enter the details in the **Person** panel.
- Enter the details in the **Address** panel. The address displayed is the default address for the company. If the person is based at a different location you can type over the default address. Use the radio buttons on the right-hand side of the address panel to determine if the new address should only appear within the context of this person (select Person Address Only) or if it should also be available at the company level (select Person And Company Address). Also, the **Select Address From List** icon allows you to choose from the list of existing company addresses to link this person to. This then provides you with a further radio button allowing you to update the company address from your current location. The Address Type can be specified as Business and/or Home by selecting the check boxes.
- Enter the details on the **Phone** and **E-mail** panels. The details default to the company phone and e-mail, but these can be overwritten with the person's direct contact details.
- Select the **Save** button.

10.8 Assigning a Different Address to a Person

- You may want to assign an address to a person that is different from the Company's usual address. To do this:
  - Find the person whose details you want to change, and open the Summary page for the person.
  - Click on the **Addresses** tab and select **New Address**.
  - Fill in the address details and ensure that you select the **Person Address Only** option underneath the address details.
  - Click on the **Save** button.

10.9 Adding a Private Address to a Person

- You may want to assign a private address to a person. To do this:
  - Find the person whose details you want to change, and open the Summary page for the person.
  - Click on the **Addresses** tab and select **New Address**.
  - Fill in the address details and ensure that you select the **Home** check box on the right-hand side of the screen.
  - Click on the **Save** button.

10.10 Changing Phone/E-mail Details

To update a person's phone number:

- Find the person whose details you want to change, and open the Summary page for the person.
- Select the **Phone/E-mail** tab.
- Enter the change on the **Phone** panel and click on **Save**.
- To update a company phone number:
- Find the company whose details you want to change, and open the Summary page for the company.
- Select the **Phone/E-mail** tab.
- Enter the change on the **Phone** panel and click on **Save**.

10.11 Adding a Company that has Multiple Sites

- If you are creating a new company that has more than one geographical site, you should create the company in the normal way and then add the additional address with the New Address button on the Addresses tab.
- Alternatively, you may wish to talk to your System Administrator about customizing the Company and Address fields to suit you needs.

10.12 Adding a Company that has Multiple Subsidiaries

- If you are creating a new company that has more than one subsidiary, you need to:
    - Create all of the companies separately—the main company and all of the subsidiaries.
    - Ask your System Administrator to make the **Related Companies** tab available to you.
    - Open the main company you created and select the **Related Companies** tab.
    - Use the **New** action button to link each subsidiary to the main company, one by one, and specify the type of relationship that exists between them with the **Relationships** list.
    - Once the relationships are set up you can click on the **Graphic Mode** button on the **Related Companies** tab to view a graphical representation of the company and its subsidiaries.
- Alternatively, you may wish to talk to your System Administrator about customizing the Company and Address fields to suit you needs.

10.13 Adding a Note

- You can add notes to Companies, People, Cases, Solutions, Sales Opportunities, and Leads. To add a free text note to a Company, for example:
  - Open the company you want to make changes to, and click on the **Notes** tab.
  - Select the **New Note** button.
  - Type the text of the note.
  - Select the **Save** button.
- You can add an unlimited number of text notes to the system, and attach them directly to the records where they are most relevant. Notes can be attached to: Companies, People, Communications, Leads, Sales opportunities, Customer service cases.

10.14 Editing a Company or Person Note

To edit a free text note to a company, for example:

- Open the company you want to make changes to, and click on the **Notes** tab.
- Click on the hypertext link of the note. The Notes input page is displayed.
- Type the changes to the note.
- Select the **Save** button.

10.15 Building a Company Team

- The Company Team tab within the context of a company gives you an overview of who is involved from your organization in the management of large accounts. Your System Administrator must give you access to the Company Team tab. The System Administrator can also set up restrictions so that only Company Team members can gain access to sensitive accounts.
- To add a new Company Team member to a company:
  - Open the company you want to make changes to, and click on the **Company Team** tab.
  - Select the **Add Team Member** button.
  - Select the User from your organization from the list and add a description of their role.
  - Select the **Save** button.

10.16 Adding a Person without a Company Link

- You can add a person to the system independent of any company affiliation. This means you can:
- Keep track of a valuable contact as they move in their career.
- Stay in contact with a source of advice or expertise who does not work for any one company.
- To add a new person who is not affiliated to a company:
  - Make sure you are not in the context of an existing company. If you are, click on the **My CRM** button. This takes you out of an existing company "folder" with one click.
  - Right-click on or hover over the **New** menu button.
  - Select **Person** from the pop out list. The Person duplicate find page is displayed.
  - Type the first few letters of the **person's name**, and select the **Enter Person Details** button. The system searches for possible duplicate person names. For more information, please refer to Preventing Duplicate Entries. If no potential duplicate person is found, the New Person page is displayed.
  - Leave the **For** panel blank if you do not want to associate this person with a company. If you do want to link the person to a company, search for the company from the For panel.
  - Enter the details in the **Person** panel.
  - Enter the details in the **Address** panel.
  - Enter the details in the **Phone** and **E-mail** panel.
  - Select the **Save** button.
- You can see that there is no link to a company in the context area of the screen. All the tabs relate to the person. You can add notes, addresses, phone, and e-mail information for the person in the same way as you do for a company or for a person within a company.

10.17 Reassigning a Person to a Company

- If a person who you have been tracking as an individual (that is, the person is not related to a company in any way) later moves to join a specific company, you can assign them to a company and move all the communications, opportunities, and cases linked to them across to the company.
- **Note:** Your System Administrator needs to give you rights to do this.
- To reassign a person to a company:
    - **Find** the person you want to reassign.
    - Click on the **hypertext** link of their name to display the Summary page.
    - Select the **Change** button. The Summary page is displayed in edit mode, with a new button, Merge Person.
    - Select the **Merge Person** button. This displays an additional panel, Assign Company.
    - Search for and select the company that you want to assign the person to.
    - Select the **Save** button.

10.18 Preventing Duplicate Entries

- Deduplication is enabled by default in the system, with the match rules outlined below. The deduplication screens and the match rules can be customized by your System Administrator. Checking for duplicates then automatically becomes part of the process for adding a new company or person into the system.
- To check for duplicate entries before adding a new company:
  - Right-click on or hover over the **New** menu button.
  - Select **Company** from the pop out list. The Company duplicate find page is displayed.
  - Type the **company name** and select the **Enter Company Details** button. If the information you typed matches a current company record in the system (according to the match rules defined by your System Administrator), a list of detected duplicates is displayed. The default match rule on a company is where the Company Name "contains" the entry you have typed—that is, if you type **Right** as the company name, "Design Right" is detected as a possible duplicate.
- From the list of detected duplicates you can:
- Click on the hypertext link of an existing company.
- Return to the Company duplicate find page by selecting the Back To Company Entry button.
- Proceed to add a new company by selecting the Ignore Warning And Enter Company button.
  - To proceed to add a new company anyway, select the **Ignore Warning And Enter Company** button.
  - The **New Company** page is displayed including the details entered on the Company duplicate find page.
  - Enter the **company details** and select the **Save** button.
- The new company is added into the system and the Company Summary page of the new company is displayed.
- To check for duplicate people who are unrelated to a company or people linked to companies, follow the same steps as described above, but select the New | Person option from the pop out list.
- The default match rule on a person is where the Last Name "contains" the entry you typed—that is, if you type the person name as "Smith", both "Smith" and "Blacksmith" are detected as possible duplicates.
- **Note:** The system also checks for duplicates if you change any of the fields that have match rules set on them when you edit a record. For example, you change the company name of an existing company "Design Right Inc." to "Design". The system checks for other companies, which contain the word "Design", and warns of possible duplicates, before updating the company record.

10.19 Merging Duplicate Companies

- To merge two companies, first decide which company is the "Source" company and which is the "Destination" company. When the companies are merged the source company is deleted, and all of the information associated with it—for example, people, communications, opportunities, and cases—are copied over to the "Destination" company.
- **Note:** Your System Administrator needs to give you rights to use this feature.
- To merge two companies:
  - **Find** the company that you want to keep and use as the "Destination" company. Usually, this is the company with more information stored against it.
  - Click on the **hypertext** link of the company name.
  - Select the **Change** button and then the **Merge Company** button. This displays an additional panel, Merge Company.
  - Use the **Search Select** buttons to select the source company.
  - Select the **Save** button. The destination Company Summary page is displayed. A review of the tabs shows that people, communications, opportunities, and cases of the source company have been copied across to the merged company. In addition, the source company is deleted.

10.20 Merging Duplicate People

- Your System Administrator needs to give you rights to use this feature.
- To merge duplicate person entries:
  - **Find** the person that you want to keep and use as the "Destination" person. Usually, this is the person with the most information stored against them.
  - Click on the **hypertext** link of the person's name.
  - Select the **Change** button and then select the **Merge Person** button. This displays an additional panel, Merge Person.
  - Click on the **magnifying glass**, search for and select the source person.
  - Check the **boxes** according to the information that you wish to merge. Unlike the company merge, you also have the option to keep the source person. The Merge Relations field refers to linked information set up by your System Administrator.
  - Select the **Save** button. The destination Person Summary page is displayed. A review of the tabs shows that the information associated with the source person has been copied across to the merged person, according to the check boxes you selected. The source person is only deleted if you selected the Delete Source Entity check box.

10.21 Deleting Company or Person Records

- Unless you are a System Administrator or a power user, it is unlikely that you will have the ability to delete company or person records. Instead you should:
- Ask your System Administrator about giving you the rights to merge person and company records.
- *Or*
- Set the status of the person or company to Inactive. To do this, open the Company or Person **Summary** page, select the **Change** action button, select **Inactive** from the **Status** list and click on **Save**.
- If your profile allows you to delete company or person records, a Delete action button is available on the Person or Company Summary page.
- To delete a Company or Person:
    - Find and open the company or person you want to delete.
    - From the Summary page, click on the **Delete** button and then on the **Confirm Delete** button.
- The person or company record is deleted from the system.

11 Appointments and Tasks

FAQs

Show me how to:

- Create a task.
- Create an appointment.
- Schedule a Callback.
- Understand the Communication fields and icons.
- Check my own diary.
- Check a colleague's diary.
- Review the contact history with a person or company.
- Review notifications.
- Change the status of a task or an appointment.
- Find a communication.
- Invite partners to a meeting.
- Create a recurring task or appointment.
- Synchronize my CRM and Outlook calendars.
- Link a document to a task or appointment.
- Link a communication to a campaign.
- See my colleague's availability for an appointment.

11.1 Creating a Task

To create a task:

- Right-click on or hover over the **Find** menu button. The Pop Out list is displayed.
- Select **Person**. The person Find page is displayed
- Type the **name** of the person and select the **Find** action button. A list of people matching your search criteria is displayed.
- Click on the **hypertext** link of the person you want to schedule the task with. This displays the Person Summary page.
- Right-click on or hover over the **New** menu button. The Pop Out list is displayed.
- Select **Task**. The New Task page is displayed. **Note:** You can also select the Task button directly from the New Pop Out list or from My CRM | Calendar. The difference is that you then need to find the person you are scheduling the task with, using the Schedule Task For panel. You can also schedule communications that are not linked to a person or company. This is covered later in this chapter.
- Enter the details on the page.
- Select the **Save** button.

11.2 Creating an Appointment

- To create a new appointment:
    - o From the **My CRM | Calendar** tab, select the **New Appointment** button. Alternatively, right-click or hover over the **New** menu button and select Appointment.
    - o Fill in the details of the appointment. The **Schedule Task For** panel allows you to link the appointment to an existing company and person.
    - o Ensure that your name is selected from the list of users, and select **Save**.

11.3 Scheduling a Callback

To create a callback:

- Right-click on or hover over the **Find** menu button. The Pop Out list is displayed.
- Select **Person**. The person Find page is displayed.
- Type the name of the person and select the **Find** action button. A list of people matching your search criteria is displayed.
- Click on the hypertext link of the person you want to schedule the callback with. This displays the Person Summary page.
- Right-click on or hover over the **New** menu button. The Pop Out list is displayed.
- Select **Task**. The New Task page is displayed.
- **Note:** You can also select the Task button directly from the New Pop Out list or from My CRM | Calendar. The difference is that you then need to find the person you are scheduling the communication with, using the
- Schedule Task For panel.
- Enter the details on the page.
- Select the **Save** button.

11.4Communication Fields

Communication Details

Field	Description
Action	The type of task, for example, Phone Out or E-mail In.
Details	A summary of the task
Status	Status of the communication. For example, Planned, Complete, or Cancelled, Re-schedule
Priority	Priority of the task. For example, High, Medium, or Low.
Private	This check box can be selected if the task should only be viewed by the assigned user.
Created By	This field is displayed once the appointment or task is saved. It shows the user who created the appointment or task.
Created Date	This field is displayed once the appointment or task is saved. It shows the date the appointment or task was created.

Communication Scheduling

Field	Description
Due Date / Time	Date the task must be completed by. This is the Date/Time that appears in all CRM Communications lists and determines where the task appears in the Tasks panel of your Calendar View. When you add the Due Date/Time, the Onscreen Reminder field is enabled, and the Reminder Date/Time set to the same time as the Due Date/Time.
TCL Attendees	The person who is responsible for executing the task. In the Search For field, type the first letter, or a few letters of the first or last name, for example, **w**. The first user, whose first name begins with the letter "w", is highlighted in the list of matching users. This list also displays all users containing the letter "w". Highlight one or multiple users, and click on the Add button to assign them to the task or meeting. If there are 10 users or less in the system, all of the users will be listed in the User section. Select the required users from the list provided to assign them to the task or meeting. **Note:** When you add more then one user to a task, you are creating multiple tasks.
Start Date / Time	Date/Time the task is "active" from. Used in MS Outlook if you are filtering tasks by the active date and time.
Onscreen Reminder	This field is implementation dependent and may have been switched off by your System Administrator. Check this box to get an on-screen reminder for the task. Is checked by default
Reminder	If the Onscreen Reminder field is enabled, you can select this check box to receive the reminder in different formats depending on the priority of the communication. The different formats and priorities are set up within the Preferences tab. Please refer to Preferences for more information.
Reminder Date / Time	Date/Time of the reminder. Reminder time is 6 hrs prior to appointment/task by default.
Send Reminder Message	If the Onscreen Reminder field is enabled, you can select this check box to receive the reminder in different formats depending

	on the priority of the communication. The different formats and priorities are set up within the Preferences tab. Please refer to Preferences for more information. It is checked by default.

If the new communication is an appointment, the scheduling panel includes the additional fields described below.

Field	Description
Date / Time	Start date and time of the appointment. Defaults to the current Date/Time.
End Time	End date and time of the communication. Defaults to half an hour after the Date/Time.
Reminder	Select the length of time from the list. This is the length of time prior to the meeting taking place that you receive a reminder.
Recurrence	Select this button if you want to set the current appointment up as part of a recurring pattern of appointments. For example, every Monday at 10.00 AM to meet with the Professional Services team.

The Meeting Planner panel is displayed on all Appointments (communications where the Action field is set to Meeting). The Meeting Planner panel is not displayed for Recurring Appointments or Tasks. The table below explains the fields on the Follow-up panel.

Field	Description
Create Follow-up Task	The check box can be checked to generate a new task based on the current information, immediately after saving the current task.
Create Follow-up Appointment	The check box can be checked to generate a new meeting based on the current information, immediately after saving the current task. The Create Follow-up Task and Appointment check boxes cannot be checked at the same time
Create Follow-up Opportunity	The check box can be checked to generate a new opportunity based on the current information. Note that it is only displayed when editing existing communications.
Send SMS Message Immediately	If SMS messaging is enabled by your System Administrator, selecting this option immediately notifies the user(s) assigned to the task or meeting.

Selecting the Show Campaigns button displays a new panel called Campaigns.

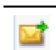
The table below explains the fields on the Campaigns panel.

Field	Description
Wave Activity	Click on the magnifying glass to search for a Campaign Wave Activity to link the communication to. Once you have selected the Wave Activity a further field, called Response Type, is displayed. If the communication was scheduled within the context of a Wave Activity, for example, to register a mail shot going out, the Wave Activity is read-only.
Response Type	List of Response Types related to the Wave Activity.

Communications generated within the context of a campaign are automatically linked to a wave activity. When edited, the Campaigns panel is immediately displayed.

For more information, please refer to Campaign Management.

The table below shows the standard Action type icons.

Icon	Action
	Vacation
	Phone Out
	Phone In
	Letter Out
	Letter In
	E-mail Out

Icon	Action
	E-mail In
	Fax Out
	Fax In
	Meeting
	Demo
	To Do

The table below shows the standard Status icons.

Icon	Status
	Pending
	In Progress
	Complete
	Cancelled

The table below shows the standard Priority icons.

Icon	Priority
	High
	Normal
	Low

11.5 Scheduling Unlinked Communications

- You can also create new tasks and appointments, which are not linked to a company or person. This commonly occurs with internal communications.
- From the **My CRM | Calendar** tab:
    - Select the **New Task** button. The Enter New Task page is displayed.
    - Fill in the details leaving the Schedule Task For panel blank.
    - Ensure that your name is selected from the list of users.
    - Select the **Save** button.

11.6 Scheduling a Quick Appointment or Task

- Some appointments or tasks do not have to be linked to person or company records in CRM. Neither do they need to have much detail attached to them—they can just be like Post-It notes.
- You can easily capture these in CRM using the Quick Appointment and Quick Task buttons in the My CRM | Calendar tab.
- To create a Quick Appointment:
    - Select the **Calendar** tab within My CRM. Make sure you are in Calendar View. If you are in List View, select the Calendar View button.
    - Type a few key words in the **Quick Appointment** field at the top of the Calendar panel.
    - Select the **time** and approximate **duration** from the next two fields.
    - Click on the **Quick Appointment** button. The appointment is displayed in your Calendar for today.
- **Note:** Quick Appointments created in the Day view are scheduled for the day you are looking at, as opposed to the current day.
- To create a Quick Task, repeat the steps described above using the Quick Task field at the top of the Tasks panel.

11.7 Notifications

- Notification messages are displayed in the Calendar area within My CRM if the user who created an appointment or task specified a reminder interval when they created it. If you set reminder intervals when you created a number of tasks and appointments, for example, and some of those tasks and appointments are due this afternoon, reminder messages are displayed on-screen for each of them.
- You can dismiss or "snooze" all of your reminders at the same time, or you can dismiss or snooze them individually.
- When one or more notification reminders are displayed on-screen, you can dismiss all of them by selecting the
- **Dismiss All** hypertext link. To dismiss a single notification reminder, select the **Dismiss** hypertext link next to the individual notification.
- You can "snooze" all of the on-screen notifications for a selected time interval, such as 30 Minutes, 6 Hours, or 1 Day by selecting the snooze interval from the **Snooze All For** drop-down list. To snooze a single notification reminder, select the snooze interval from the **Snooze For** drop-down list next to the individual notification.

11.8 Changing the Status of a Communication

- From your Calendar:
  - Click on the **Action** icon of the task. The Task Details page is displayed.
  - As you are making the call, you can add notes to the Details field.
  - When the call is completed, select **Complete** from the Status list. You can also click on the Pending Status icon from the Calendar View. This automatically changes the status to Complete and displays the Task page.
  - Check the follow-up boxes if required.
  - Select the **Save** button. The Calendar page is displayed.
- You will notice that the completed task no longer appears in your Calendar. It is, however, saved in the
- Communications tab of the Person the call was scheduled with, forming part of the Prospect / Lead / Opportunity history.
- **Note:** Tasks are "rolling" in CRM. This means that a task will stay in the Tasks panel of your Calendar until it is completed. Appointments are not rolling. They remain on the calendar on the date and time scheduled. Please refer to Navigating your Calendar for more information.

11.9 Finding a Communication

- To find a communication:
  - Right-click on or hover over the **Find** menu button. The Pop Out list is displayed.
  - Select **Communication** from the pop out list. The communication Find page is displayed.
  - Type or select the search criteria on the Find page.
  - Select the **Find** action button. A list of all communications matching your search criteria is displayed.
  - Click on the hypertext link Status icon of the Communication. The Communication Details page is displayed, which gives you an overview of the communication.

11.10 Reassign an Existing Task to a Colleague

- From your **Calendar** tab, click on the **Action icon** of the task. The Task page is displayed.
- Select the name of your colleague from the **User** field.
- Select the **Save** button. The task is now displayed in your colleague's Calendar/Tasks tab.

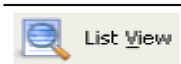
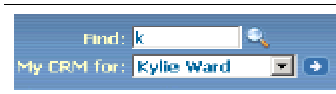
11.11 Scheduling a Task for a Colleague

- Select **My CRM | Calendar** tab.
- Select the **New Task** button. The **Enter New Task** page is displayed.
- Use the **Search Select** buttons to add the person you want to the Company and Person fields on the for panel.
- Add in the task details, selecting your colleague from the **User** field.
- Select the **Save** button.
- The new task is displayed in the list of the Communications tab of the company and person selected. It is also displayed in the Calendar tab of the user it has been scheduled for.
- The Created By field indicates who scheduled the task.

11.12 Checking a Colleague's Diary

- The ability to check a colleague's diary depends on your security profile. If you have the appropriate rights, you can check diaries via My CRM or you can cheque them while you are scheduling a meeting.
- To check a colleague's diary via My CRM:
  - o Open the **My CRM | Calendar** tab.
  - o Type the first few letters of the user's name in the **Find** field in the context area.
  - o If there is more than one match, select the name from the **My CRM For** list. Otherwise, the name appears in the My CRM For field automatically.
  - o Click on the **right-pointing** arrow beside the My CRM For field.
- Your colleague's diary is displayed.
- To check a colleague's diary while you are scheduling a meeting:
  - o Begin creating the meeting in the normal way.
  - o Review the **Meeting Planner** panel on the Enter New Appointment page.
  - o Any conflicts with the current meeting are highlighted in red. Hovering over the overlap shows the details of the meeting.
  - o After you have made adjustments, save the meeting in the normal way.

11.13 Navigating your Calendar

Graphic	Description
	Select the New Appointment button to create a new appointment.
	Type in a few key words, select a time and approximate duration, and select the Quick Appointment button to create a quick unlinked diary entry.
	Select the New Task button to create a new task. For example, a call back you need to make.
	Type in a few key words, and select the Quick Task button to create a quick item in your Task list for the day.
	Select the New E-mail button to create and send an e-mail.
	You can reduce or expand the list of Tasks that you see by changing the Tasks To View selections. You can also toggle overdue tasks on or off. Overdue tasks are highlighted in red.
	The Filter Box on the right-hand side of the screen is set by default to show all communications (appointments and tasks) with a status of Pending. You can change this to show Cancelled, Complete, or All types of Status. You can also set a filter to show, for example, only Phone Out actions. When you change filter settings, remember to select the Apply Filter button to see the effects.
	The List View button allows you to toggle to the list view of the Calendar/Tasks page. Once in the List View, you can toggle back to the Calendar View by selecting the Calendar View button.
	The Print button is available if you are in daily or weekly Calendar View. You use it to print out all appointments and tasks for the selected time range, as well as all overdue tasks.
	Your System Administrator defines the access rights to be able to view other peoples' calendars within your organization. If you do have access, you can select another user's name within the My CRM context area to view their calendar. To switch back to your own calendar, select your name from the context area of the screen. The My CRM For field is always available in this context. However, the Find field is available only when there are more then 10 users in the system.

Graphic	Description
	The View By list at the top of the calendar allows you to switch between daily, weekly, monthly, and yearly views of your calendar. The daily view can be customized from the My CRM | Preferences tab. Please refer to Accessing Preferences for more information. **Note:** The monthly and yearly calendar views need more space to be displayed. With either of these options selected, the Tasks panel will not be displayed. The tasks are displayed on the Monthly and Yearly calendars.
	You can use the date display at the top of the Calendar panel to navigate forwards and backwards from the current date. You can click on the calendar icon to select a specific date. **Note:** changing the date display on the Calendar panel affects the view of your appointments in your calendar. The Tasks that you can view are determined by the settings at the top of the Tasks panel. Clicking on **View Today** displays the daily view of your Calendar for today's date. You can reschedule appointments in your calendar by drag-and-drop. Select the communication icon and, holding down the mouse button, drag the appointment to a new time or date. Gray shading indicates the current time, date or week in the daily, weekly, and monthly calendar views respectively.

11.14 Meeting Planner

- To speed up the planning process, there is a meeting planner tool integrated into the Enter New Appointment page.
- To schedule the meeting and invite your colleagues:
    - **Find** the Prospect / Lead / Opportunity you are having the meeting with and open their "file" so that the person's name appears in the context area of the screen. You can also schedule a new appointment from your Calendar tab by selecting the New Appointment button. You then search for the person within the Enter New Communication page.
    - Right-click on or hover over the **New** menu button. The Pop Out list is displayed.
    - Select **Appointment**.
    - Select the date and start and finish times of the meeting from the calendar. The meeting planner is displayed in
- a panel with your user name already selected as an attendee.
    - To invite colleagues, search for the names from the User field and click on the **Add** button. The invited users are displayed in the Meeting Planner panel. Any conflicts with the current meeting are highlighted in red. Hovering over the overlap shows the details of the meeting:
    - To change the start or finish time of the meeting, click on the time line of the Meeting Planner, or use the Date/ Time and End Time fields.
- The View By list at the top of the calendar allows you to switch between daily, weekly, monthly, and yearly views of your calendar. The daily view can be customized from the My CRM | Preferences tab.
- Please refer to Accessing Preferences for more information.
- **Note:** The monthly and yearly calendar views need more space to be displayed. With either of these options selected, the Tasks panel will not be displayed. The tasks are displayed on the Monthly and Yearly calendars.
- You can use the date display at the top of the
- Calendar panel to navigate forwards and backwards from the current date. You can click on the calendar icon to select a specific date.
- **Note:** changing the date display on the Calendar panel affects the view of your appointments in your calendar. The Tasks that you can view are determined by the settings at the top of the Tasks panel.
- Clicking on **View Today** displays the daily view of your Calendar for today's date.
- You can reschedule appointments in your calendar by drag-and-drop. Select the communication icon and, holding down the mouse button, drag the appointment to a new time or date.
- Gray shading indicates the current time, date or week in the daily, weekly, and monthly calendar views respectively.
- When you have completed the adjustments to the meeting times, click on the **Save** button. The meeting is displayed in the Calendar of each invited user.

11.15 Reviewing the Contact History

- If you want to find out what contact your company has had with a particular company or person, you can investigate it in a number of ways.
- With the company or person **Quick Look** tab selected, review your recent history with this company or person at a glance. The Quick Look tab lists the most recent communications, sales, and customer service cases linked to the company or person.
- With the company or person **Summary** tab selected, run a Company or Person Summary report to review a quick overview of account information in PDF format.
- With the company or person **Communications** tab selected, review the list of communications your company has had with the company or person.

11.16 Inviting Prospect / Lead / Opportunities or Partners to a Meeting

- You can show the participation of more than one person outside your company in meetings or conference calls.
- To do this:
- Open the existing appointment or task scheduled with one person from your customer's or partner's organization. **Note:** To link people to the communication, they must already exist in CRM.
- Click on the **Related Persons** tab, and select **New** to add additional people who are participating in the meeting or phone call.

11.17 Recurring Appointments

- The Recurring Appointments feature allows appointments (meetings) to recur based on a defined recurrence pattern.
- Many companies have regularly occurring events, for example, an Engineering Department progress meeting on the first Monday of every month. Instead of having to manually enter each event, this can be done by creating the appointment once and setting up a recurrence pattern.
- Find out more about recurring appointments in:
    - Creating a Recurring Appointment
    - Changing a Recurring Appointment
    - Deleting a Recurring Appointment

11.17.1 Creating a Recurring Appointment

- Select the **New Appointment** button from within the Person, Company, Lead, Opportunity, or Solution context, or from within My CRM. The Appointment page is displayed.
- Select the **Recurrence** button. The Communication Recurrence page is displayed in a new window.
- Set the **Recurrence Pattern** to Daily, Weekly, or Monthly.
- Select the **Daily Pattern** for each date in the series. This can be set to either Occurs Once At or Occurs Every.

- When the Occurs Once At option is selected, just one communication is created for each date set up in the recurrence pattern. When Occurs Every option is selected, several communications are created. The Starting At and Ending At times enable you to specify a range in which the communications will occur.
    - Select the **Start Date** and **End Date** for the recurring pattern of appointments.
    - Select the **Continue** button.
    - Select the **Save** button. Appointments are created for the time, frequency, and duration selected in the Communication Recurrence page.
- **Note:** The default maximum number of occurrences is 200. This is set by the System Administrator. If you exceed the maximum number of occurrences, an error message is displayed before you are allowed to save the recurring appointment.

11.17.2 Changing a Recurring Appointment

- Click on the hypertext link icon of the appointment. The Appointment page is displayed.
- To change the Date or Time or any of the recurrence details, you need to select the **Recurrence** button, make the changes in the Communication Recurrence page, and select Continue.
- The text on the lower part of the Scheduling panel indicates the current recurrence status of the appointment.
- To change any other details of the communication, for example, the users taking part in a meeting, make the changes, decide if they apply to just this or all the recurrences of this appointment, and select Save.
- When you select Save after making changes to a Recurring Appointment, a dialog box opens giving you the option to apply the changes to all the recurrences of this appointment. Select either **This Appointment Only** or **All Appointments In The Series**, and click OK.
- **Note:** You can turn existing non-recurring appointments into recurring appointments and vice versa.

11.17.3 Deleting a Recurring Appointment

- If you have the rights to delete communication records, you can also delete recurring appointments. You do this in the same way as non-recurring appointments.
- However, note that selecting the All Appointments In The Series option results in all recurrences of the appointment being deleted.

12 E-mail

FAQs
Show me how to:
- Send e-mails from CRM.
- Reply to an e-mail.
- Handle inbound e-mail.
- Keep e-mails with Prospect / Lead / Opportunity records.
- Use MS Outlook to send e-mails.
- Use e-mail shortcuts in CRM.

12.1 Sending an E-mail

- CRM takes advantage of having all of your Prospect / Lead / Opportunity data in the system, by providing a functionality for sending and receiving e-mails so that you:
- Don't need to retype or remember contact e-mail addresses that are already in the system.
- Can store e-mails with the Prospect / Lead / Opportunity record for future reference.
- Can convert inbound e-mails directly to a Customer Service Case, a Sales Opportunity, or new Lead.
- To send an e-mail from CRM:
    - Search for the Prospect / Lead / Opportunity you want to send an e-mail to.
    - Click on the hyperlink of the person's e-mail address.
- The E-mail input form is displayed. The E-mail input form can be opened by clicking on any hyperlinked e-mail address in the system, or by clicking on the New E-mail button from within the My CRM | Calendar tab, or from any Communications tab. The e-mail screen can be displayed in different modes:
- Normal. The e-mail screen takes up the whole CRM screen.
- Split. The e-mail screen is displayed in the lower half of the screen. This allows you to carry on working in
- the system, performing such tasks as searching for people or companies and viewing their details, while writing the e-mail in the lower half of the screen. This is the default way the screen appears. Popup. The e-mail screen is displayed in a new browser window. This also allows you continue working in the system and write the e-mail at the same time.
- You can switch from Split to one of the other screen positions by changing the E-mail Screen Position setting from the My CRM | Preferences tab. For information on changing your Preference settings, please refer to Preferences.
    - Select a template from the **Template** list or leave the default selection to start a blank e-mail.
    - The **From** list contains your e-mail address by default. However, if you have been given permission to send emails from other accounts, you can select the addresses from this list. You can also change your default e-mail address in My CRM | Preferences if you have been given permission to send e-mails from other accounts.
    - Select the **Reply To** address in the same way as you selected the From address. Whether the Reply To e-mail addresses are available depends on whether you have been given permissions to send e-mails from other accounts. If you have not been given permissions, the field is not displayed.
    - Check you have the intended recipient of the e-mail in the To field.

- If you are already in the context of a person when you click on the New E-mail button, or you have clicked on the person's e-mail address hyperlink, then the e-mail address is already displayed in the To field.
- If you are working in split-screen or popup mode, then you can Find the Person or Company that you want to send the e-mail to, and click on the hyperlink of their e-mail address.
- Enter the e-mail address of the person you want to CC the e-mail to in the **CC** field. You can specify more than one person here if you wish.
- If you want to **BCC** the e-mail to anybody, enter their e-mail address(es) in this field.
- If you want to include CRM users in the To, CC, or BCC fields you can add them by selecting their name from the list of users and clicking on the To, CC, or BCC button. You can include as many users as you wish in this way, but you must add them one-by-one.
- Type your message in the body section. You can format the text you entered with the formatting buttons at the top of the body field. You can also include HTML content and inline images in the body. For more information on adding HTML content and inline images to the e-mail body and formatting text, please refer to Sending Mass Emails.
- When you are entering text in the body section, note that Shift + Enter in the text inserts a single line break.
- Enter inserts a carriage return.
- You can attach shared documents and local files.
- To attach a shared document, use the Advanced Search Select icons to locate the file, select the file and then select the **Upload Attachment** button. Please refer to Search Select Advanced for details on using the Advanced
- Search Select buttons.
- To attach a local file, select the **Browse** button, navigate to the file, and select the **Upload Attachment** button.
- You can remove the attachment by selecting the delete button, which is displayed once the file is uploaded.
- When you send the e-mail, a communication record is automatically created and stored against each person the e-mail was sent to.
- The Communication Options panel displayed at the end of the E-mail input form allows you to change the default entries for some of the Communication fields.
- Make any changes required to the fields on the **Communication Options** panel.
- Select the **Send** button to send the e-mail. Once the e-mail is sent, it is saved as a Communication against the
- Person it was sent to and in your Calendar. To view the e-mail you sent, click on the Communications icon.

12.2 E-mail Shortcut Keys

You can use the following short cuts on any hyperlinked e-mail address for inserting contact information into the email address fields:

Short cut	What it does
Shift + Click	Opens new e-mail and puts addresses in To field.
Ctrl + Click	Opens new e-mail and puts addresses in CC field.
Alt + Click	Opens new e-mail and puts addresses in BCC field.

12.3 Handling Inbound E-mails

- If you have Outlook Integration installed on your system, you can also use the File E-mail button from Outlook to file an inbound e-mail communication with the Prospect / Lead / Opportunity record in CRM. Please refer to Filing E-mails from Outlook to CRM for more information.
- If E-mail Management is set up on your system, inbound e-mails can automatically get filed against the matching person or company record. Please refer to "Filing Inbound and Outbound E-mails" in this chapter for more information.
- If E-mail Management is set up on your system, inbound e-mails can automatically get filed against the matching person or company record. Please refer to "Filing Inbound and Outbound E-mails" in this chapter for more information.
- Please refer to Linking E-mail Correspondence to a Prospect / Lead / Opportunity for more information.

12.4 Replying to an E-mail

- To reply to e-mail that is stored in CRM with a communication record:
    - **Find** the person who you received the e-mail from.
    - Select the **Communications** tab within the context of that person.
    - Click on the Communications icon of the e-mail you sent. The E-mail In page is displayed.
    - Select the **Reply** or **Reply All** button. The E-mail input form is displayed.
    - Complete all of the fields and send the e-mail. Please refer to Sending an E-mail for a description of the fields.

12.5 Using Microsoft Outlook to Send E-mails

- You can merge Prospect / Lead / Opportunity details with the e-mail functionality in CRM and then send the e-mail using Outlook.
- To send the e-mail using Outlook:
- Find the person you want to send the e-mail to.
- Click on the hyperlink of the person’s e-mail address. The E-mail input form is displayed.
- Instead of selecting the Send button, click the **Send Using Outlook** button. An Outlook window is displayed, containing the To address of the selected person.
- Type the body of the e-mail.
- Select the **Send** button in the Outlook window. The e-mail is sent by Outlook, and it is also saved with the communication record against the person or company it was sent to.
- **Note:** Any attachments to the CRM e-mail will be attached automatically to the Outlook e-mail.

12.6 Converting E-mails

- You can convert either an inbound or outbound e-mail communication to an opportunity, case, or lead.
- For example, you receive an e-mail with a problem from a Prospect / Lead / Opportunity. If you have E-mail Management installed, inbound e-mails can automatically get filed against the matching person or company record. You can then convert the e-mail directly to a customer service case using the workflow buttons on the right-hand side of the Communication page.
- Even if you do not have these additional modules installed, you can convert any existing communication, where the action type is E-mail In or E-mail Out to a case, opportunity, or lead.
- To do this:
    - Open the **E-mail In/Out** communication that was created when you sent or received the e-mail.
    - Select New Case, New Opportunity, or New Lead from the Create list.
    - Enter the details of the case, opportunity, or lead and select the **Save** button.
- The case, opportunity, or lead is saved against the person or company you sent the e-mail to.

12.7 Filing Inbound and Outbound E-mails

- You can carry out basic filing of e-mails from Outlook to CRM using Outlook Integration installed from the My CRM |
- Preferences tab. Please refer to Filing E-mails from Outlook to CRM.
- If your System Administrator has set up CRM to use the E-mail Management functionality, additional automated email filing is available to you.
- Find out more about filing inbound and outbound e-mails in:
    - E-mail Out
    - E-mail In
    - Rules Applied to E-mail Handling

12.7.1 E-mail Out

- E-mails sent from CRM, or from CRM using the Send Using Outlook button, are automatically BCCed to a Mail
- Manager Server Filing address.
- **Note:** In CRM, this address is not visible in the BCC field, but you can tell if the E-mail Management functionality is set up, as this Mail Manager Server filing address is visible in the BCC field if you click the Send Using Outlook button
- You can also send e-mails from outside of CRM to a Prospect / Lead / Opportunity and manually add the Mail Manager Server Filing address to the BCC field.
- The effect of using E-mail Manager on outbound e-mails is that regardless of whether you send the e-mail from
- CRM, or direct from Outlook (or other E-mail application) and manually BCC the Mail Manager Server Filing address, a communication record will automatically be created against the Prospect / Lead / Opportunity who matches the e-mail address in the To field. Please refer to Rules Applied to E-mail Handling in this chapter for more information.
- Attachments to e-mails are also filed with the communication record in CRM

12.7.2 E-mail In

- Inbound e-mails can be forwarded to the Mail Manager Server Filing Address. When this happens, a new
- Communication record is created in CRM. Attachments are saved with the communication.
- For e-mails received by users and then forwarded to the Mail Manager Server Filing Address, this e-mail address must be the only address in the To field.
- The original sender's e-mail address must be the first e-mail address contained in the body of the e-mail that is forwarded to the mailbox. This is because E-mail Management recognizes the first address in the body as being the original sender's address. **Note:** You may need to retype the sender's e-mail address at the top of the forwarded e-mail to ensure this filing takes place correctly.
- This E-mail Management functionality can be further customized by your System Administrator so that, for example, any incoming e-mails to the support@*domain*.com automatically create a Case assigned to the Customer Service team. Check with your System Administrator for more information.

12.7.3 Rules Applied to E-mail Handling

- When an e-mail is received in the specified mailbox, the e-mail database table is checked for all the people associated with the e-mail address.
- If only one person is associated with that e-mail address— even if the e-mail address is used as a private and business type—a communication is created for that person, which is also associated with the CRM user.
- If an associated person cannot be found or if multiple people are associated with the address, the e-mail table is checked for an associated company and a communication is created for that company. This is also associated with the CRM user.

13 MS Outlook Integration

FAQs

Show me how to:

- Download the MS Outlook plugin.
- Use CRM from within Outlook.
- Synchronize Contacts from CRM to Outlook.
- Synchronize Contacts from Outlook to CRM.
- Change and Delete Contacts.
- View contact information from Outlook.
- Synchronize Outlook Appointments and Tasks.
- Synchronize CRM Appointments and Tasks.
- Review Synchronization Conflicts.
- Attaching Shared Documents to Outlook E-mails.
- File E-mails from Outlook to CRM.
- Identifying E-mails Filed to or Received from CRM in Outlook 2003.
- Reinstalling the MS Outlook plugin.
- Uninstall the MS Outlook integration.

13.1 Downloading the MS Outlook Plugin

- To use the MS Outlook integration and synchronization features of CRM, you need to download the MS Outlook Plugin from within CRM. Before you do this:
- Check that your e-mail account runs on Microsoft Exchange Server, as CRM Outlook client integration is only supported for e-mail accounts running on Microsoft Exchange Server.
- Check that you are running either Outlook 2000 (with SR-1 or above) or Outlook 2002 (XP), Outlook 2003 or Outlook 2007.
- If you are using Microsoft Active Sync with CRM Outlook 2000 Integration, disable Active Sync from automatically synching with Outlook at startup.
- Check with your System Administrator that you are an administrator or super user of your own machine and that
- Outlook integration / synchronization has been enabled.
- Check that your timezone is set correctly in My CRM | Preferences.
- Check with your System Administrator how the Outlook synchronization has been configured. Options selected by the System Administrator will determine how CRM Outlook synchronization takes place. For example, it is possible to disable Task synchronization. The CRM User Help describes how synchronization takes place with the default configuration settings.
- To download the MS Outlook Plugin:
    - Close Outlook if it is currently open.
    - From CRM, select the **Preferences** tab. The Preferences page is displayed.
    - Select the **Install CRM Outlook Integration** button. The File Download dialog box is displayed.
    - Select the **Run** button. The Security Warning dialog box is diplayed.
- **Note**: If the plugin has already been installed by another user on the current client, the File Download and
- Security Warning dialog boxes are skipped, and the CRM Client InstallShield Wizard will run automatically to take you through the procedure for installing the Outlook plugin.
    - Select the **Run** button. The CRM Client InstallShield Wizard is displayed.
    - Make sure you are logged off CRM and **Internet Explorer** and **Outlook** are closed before continuing with the install.

- Complete the InstallShield Wizard steps.
- Using CRM from within Outlook
- CRM Outlook integration features are displayed within Outlook. In CRM, the Install icon changes to a Reinstall.

13.2 Using CRM from within Outlook

- Although working with CRM from within Outlook is similar to working with CRM in its own browser window there are some differences:
- The Menu buttons appear as subfolders underneath the CRM folder, or as icons in the CRM group, instead of appearing down the left-hand side of CRM.
- The CRM forward and back buttons, which normally appear next to the Recent List, are replaced with icons to initiate the Find and New Pop Out lists.
- You can use either the shortcut group or the subfolders to navigate CRM in Outlook.
- These are the default settings to maximize the space you have to view CRM within Outlook. The usual menu and navigation buttons on the left-hand side of the CRM page can be reactivated via the Full Menu in Outlook setting in My CRM | Preferences.
- After the plugin is downloaded, the following CRM Outlook integration features are displayed in Outlook:
    - CRM Logon page.
    - A CRM **toolbar**. See table below for details.
    - A CRM folder in the Folder List and a new CRM group in the Shortcuts.
    - A CRM menu option on the Tools menu. This can be accessed from **Tools** | **CRM**. See table below for details.
    - CRM Options page. This can be accessed from **Tools** | **CRM** | **Options**, or by selecting the Options button on the CRM Logon page. The Options page is also used for Solo client users to specify whether they want to log onto their local CRM system or to the central CRM server.
- The following table explains the CRM **toolbar** buttons.

Toolbar Button	Description
CRM	Select this button to log onto CRM from Outlook.
Sync	Initiates a synchronization between CRM and Outlook.
View Conflict Log	View conflicts which arise during synchronization to field-level detail.
View Contact	Highlight an Outlook contact, that has been synchronized with CRM, and the CRM Person Summary page for that contact is displayed in Outlook.
Add Contact	Highlight an individual Outlook contact, then add to CRM using this button.
File E-mail	File single or multiple e-mail records with the company or person record in CRM
Hide CRM View	Toggles to Show CRM View. Shows or hides a column that flags which e-mails were sent by a CRM contact or which have been filed in CRM.

The following table explains the Tools | CRM selections.

Menu Option	Description
Sync Info Reset	Resets mappings between synchronized contacts, appointments and tasks back to the state they were in after the first post-plugin-install synchronization.
Uninstall	Uninstalls the CRM Outlook plugin.
Sync	Initiates a synchronization between CRM and Outlook.
Options	Opens the CRM Options page.
View Conflict Log	View conflicts which arise during synchronization to field-level detail.

The following table explains the fields on the CRM Options page.

Menu Option	Description
Server Name	CRM install server name.
Install Name	CRM install name.
Use HTTPS	Uses an HTTPS connection.
Sync Every (mins)	Sets the automatic synchronization interval.
Show Conflicts	Displays Synchronization Conflicts window after each synchronization.
Warning if Sync to Delete More Than [ ] Items	A dialog box is displayed if more than the specified number of records in CRM are going to be deleted as a result of a synchronization. You can then decide to proceed with the deletions or to stop them.
Toolbar to Display CRM Buttons	When creating, forwarding, or replying to an e-mail from Outlook while logged on to CRM, two extra buttons are displayed on the Standard Outlook toolbar by default: Send And File and Attach Shared Doc. You can move these buttons to any Outlook toolbar.
New Mail Buttons Positions [ ] from the Left Side	This option allows you to position the toolbar buttons described above on the toolbar.

13.3 Synchronizing Contacts

- Once you have flagged the CRM contacts you want added to Outlook, or if you amend or delete flagged contacts, the end result is reflected in Outlook once a synchronization takes place.
- Outlook contacts, on the other hand, get added to CRM manually with the Add Contact button. If you amend or delete these contacts in Outlook, the end result is reflected on CRM once a synchronization takes place.
- Once contacts have been synchronized, it doesn't matter if you make changes to them in Outlook or in CRM—the details get synchronized both ways. Synchronization can be done manually using the Sync button in Outlook, or it can be done automatically at specified intervals.

13.4 Adding Contacts: CRM to Outlook

- Before they can get synchronized, you first need to flag the CRM contacts you want to synchronize with Outlook. **Note:**
- If a synchronized CRM contact has an address that is shared by another person or company and the user changes that address in Outlook, during Contact synchronization CRM will not update the shared address with the new information, but will instead create a new CRM address for the contact.
- To flag CRM contacts and synchronize them with Outlook:
    - Select the **Contacts** tab from My CRM. The Contacts page is displayed.
    - Select the **Add Contacts** button. The Find And Add Contacts page is displayed.
    - Search for the contact or contacts you want to see in Outlook. For example, search for all people who work at the company Design Right Inc. A list of people matching your search criteria is displayed. They are all unselected by default.
    - Select any contacts you want to see in Outlook. You can use the **Select / Deselect All** check box to toggle all the contacts selections on or off.
    - Select the **Add Contacts** button. The Contacts page is displayed, showing the contacts that you selected.
- You can perform further searches to add more people to the Contacts tab.
- A quick way of adding, for example, all contacts where you are the Account Manager, is to select the Add Group Of Contacts button. You can also add a person to the Contacts tab from the Summary tab of any person in CRM, by selecting the Add To My Contacts button.
- **Note:** You can perform actions (New Document, New Task, Send E-mail, Export To File) on your Contacts list in the same way as you can for any search lists or saved searches.
- You can wait until the next automatic synchronization takes place, or you can synchronize manually at this point if you wish.
    - Select the **Sync** button from the Outlook toolbar to synchronize manually. A dialog box shows the synchronization status.
    - If the synchronization process has detected any conflicts, a dialog box is displayed allowing you to review the conflicts.
    - Select the **Contacts** folder in MS Outlook to check the people you chose from CRM are there. Contacts synchronized between CRM and Outlook are tagged in Outlook with the Category CRM Contact. This can be viewed by double clicking on the contact in Outlook.

13.5 Adding Contacts: Outlook to CRM

- You add Outlook contacts to CRM manually with the Add Contact button. You cannot add a contact from outlook to
- CRM if the contact in Outlook has company information and the user does not have insert rights to the company entity
- in CRM. To add the contact, you must either be given rights to insert company data or you must remove the Company information from the outlook record.
- **Note:** If you change company information for a contact in Outlook and then synchronize with CRM, the updated company information will not be carried through to CRM. You must manually update the company information for this contact in CRM.
- CRM field level security is not applied to required fields in Outlook. So, for example, if you delete the contents of a required field in an Outlook Contact and then synchronize with CRM, you will not be warned that a required field has not been populated.
- To add Outlook contacts to CRM:
    - Select **Contacts** from the Outlook Shortcuts group.
    - Highlight the contact you want to add to CRM.
    - Select the **Add Contact** button from the toolbar.
- If the Outlook contact contains a company, a dedupe is performed on the Company name. Please refer to Preventing Duplicate Entries for more information on handling duplicate contacts.
    - If a company match is detected in CRM, the list of matches is displayed and you can select a matching company by clicking on it. Alternatively, if no company on the list matches the contact you are adding, you can click on the Ignore Warning and Enter Company button.
    - If you select a company from the list of matching companies, a dedupe is then performed on the Person. Please refer to Preventing Duplicate Entries for more information on handling duplicate contacts. If any duplicates are detected, they are displayed. You can select a contact by clicking on it. If no duplicates are detected, the new Person page is displayed in CRM within Outlook, with the existing contact details from Outlook filled in.
    - If a company match is not detected, or if one is detected and you select the Ignore Warning and Enter
- Company button, a new company (that includes the person details on the Person panel) is automatically created using the Company name from Outlook.
- If the Outlook contact does not have a company associated with it, a dedupe is performed on the Person name.
    - If a person match is detected in CRM, the list of matches is displayed and you can select a matching person by clicking on it. Alternatively, if nobody on the list matches the contact you are adding, you can click on the Ignore Warning and Enter Individual button.
    - You can create a company for the contact in CRM by selecting the New Company button on the Person details page. Please refer to Adding a New Company for more information on creating companies.
        - Select **Save** to save the contact in CRM. The contact is added to the Contacts tab in CRM so that it gets synchronized in the future. When a contact is added from Outlook to CRM, the Outlook plugin will automatically run synchronization with CRM on contacts only. This is to ensure that any additional information entered in CRM is also reflected in Outlook.

13.6 Changing and Deleting Contacts

- If you make any changes to any of your My CRM contacts, the changes are reflected in Outlook the next time you synchronize.
- When you remove a contact from Contacts in CRM or if the contact is deleted from CRM and therefore automatically removed from Contacts, it is deleted from Outlook the next time you synchronize.

13.7 Viewing Detailed Contact Information from Outlook

- Any contact in Outlook, who has been synchronized with CRM maintains a link to all the detailed Prospect / Lead / Opportunity interaction history in CRM.
- To access detailed contact information from Outlook:
    - Select the **Contacts** icon in Outlook.
    - Highlight the contact you want to view detailed information on.
    - Select the **View Contact** button from the Outlook toolbar.
- The Person Summary tab of the selected contact is displayed.

13.8 Synchronizing Appointments and Tasks

- Note that before you start working with the Outlook Synchronization feature, you need to check that your correct Time
- Zone is specified in My CRM | Preferences.
- Find out more about synchronizing appointments and tasks in:
    - Outlook Appointments and Tasks
    - CRM Appointments and Tasks
    - Working with Appointments, Meetings and Multiple Users
    - Recurring Appointments and Tasks
    - All Day Events

13.8.1 Outlook Appointments and Tasks

- All appointments get synchronized, where the end date is within the last seven days, or set to anytime in the future.
- All tasks get synchronized during the first synchronization. On subsequent synchronizations, new or modified tasks are synchronized.
- To schedule a task from Outlook:
    - Select the **Calendar** folder in Outlook.
    - Select the **New** drop-down arrow on the Toolbar, and select Task. The Task window is displayed.
    - Complete the details of the task, and set a reminder if you wish. Although you can add a contact to the task in
- Outlook, this will not be reflected in CRM—even if the contact is in CRM.
    - Select the **Save And Close** button. The task is displayed in your Task list in Outlook.
    - Select the **Sync** button, then switch to CRM. The task is displayed in My CRM. If you set a reminder in Outlook, this will pop up in Outlook as a Reminder, and in CRM as an on-screen notification.
- Tasks created in Outlook are given the default completion time of 12 noon on their Due Date in CRM.

- If you set a reminder in Outlook, this will pop up in Outlook as a Reminder, and in CRM as an on-screen notification. This applies for Tasks and Appointments

13.8.2 CRM Appointments and Tasks

- All appointments and tasks you create in CRM get synchronized to Outlook each time a synchronization takes place.
- To schedule an appointment in CRM:
  - Set up the appointment with a contact, for example Arthur Browne, in CRM for next week, and select **Save**.
  - Switch to **Outlook**.
  - Select the **Sync** button.
- The appointment is displayed in your Outlook Calendar.

13.8.3 Working with Appointments, Meetings and Multiple Users

- When you are synchronizing appointments between Outlook and CRM, in particular where some of the users may only use Outlook and not CRM, the synchronization takes place as follows:
- If you create an appointment in Outlook for a non-CRM user, their e-mail addresses appear in the CRM appointment at the end of the screen.
- If you create an appointment in Outlook for multiple CRM users, multiple users are listed against the appointment in CRM—as long as e-mail addresses have been set up against the user. The Outlook meeting organizer is displayed in the Organizer field in CRM.
- If you create an appointment with a person, for example, Arthur Browne in CRM, his e-mail address appears on the list of attendees in Outlook. You do not see from CRM if he has accepted the meeting and can attend.
- When a user in CRM creates an appointment and links a person or company to it, the selected company or person is displayed in the body of the appointment in Outlook.
- If you create an appointment in CRM with a user who does not have an associated e-mail address, for example, a Resource user such as London Meeting Room, the appointment is synchronized with Outlook, but the user is not displayed in the appointment in Outlook.

13.8.4 Recurring Appointments and Tasks

- When creating a recurring Appointment in Outlook, an End By date must be selected on the recurrence dialog box if the appointment is to be synched to CRM. Recurring Tasks are not synchronized from Outlook to CRM. Recurring
- Appointments created in CRM get synchronized to Outlook.
- **Note:** The default maximum number of occurrences in CRM is 200. This is set by the System Administrator. If you create a recurring appointment in Outlook with a greater number of occurrences than that allowed in CRM, then the appointments will not get synched. You should also note that CRM allows you to have more than one recurring appointment from a series occurring on the same day, but Outlook does not.

13.8.5 All Day Events

- An All Day Event in Outlook becomes a 24 hr appointment in CRM. A 24 hr appointment in CRM becomes an All Day Event in Outlook. For example, an All Day Event for Friday in Outlook, starts in CRM on Friday at 00:00 and ends on 23:55 Friday. An appointment created in CRM from 00:00 to 23:55 on Monday is displayed in Outlook as an All Day Event for Monday.

13.9 Reviewing Synchronization Conflicts

- Conflicts are only logged if the System Administrator has set appropriate User Configuration settings for this to take place.
- If you change, for example, Vicky Bode's Title from CFO to Chief Financial Officer in Outlook | Contacts, and someone else changes her Title from CFO to CTO in CRM, the next time you synchronize a conflict is detected. The
- Synchronization Process dialog box displays a View Conflicts button.
- To review the synchronization conflict:
  - Select the **View Conflicts** button from the Synchronization Process dialog box or from the View Conflicts toolbar button.
    - The Synchronization Conflicts window is displayed.
  - Select the conflict you want to view in the List Of Logged Conflicts panel.
    - The left-hand side of the Conflict Details panel shows the field or fields where a conflict has arisen. The righthand side of the Conflict Details panel shows the values before the synchronization took place.
    - **Hide Empty Fields** and **Hide Equal**. Toggling these fields on or off hides or shows the fields where the values are equal in both Outlook and CRM.
    - **Clear Log**. Clears all the conflict from the List Of Logged Conflicts panel.
    - **Delete Selected**. Clears the selected conflict from the List Of Logged Conflicts panel.
    - **Copy Details**. Copies the Outlook value to the clipboard so that it can be reinstated if required.
    - **Help**. Displays the CRM help page on Synchronization Conflicts.
  - Scroll to highlighted field to review the conflict in data.
    - In this scenario, Vicky Bode's Title is changed to CTO. Use the **Copy Details** button if you need to reinstate the Outlook value.

13.10 Attaching Shared Documents to Outlook E-mails

- When you are logged on to CRM from within Outlook, you can attach documents from the Shared Documents tab in
- CRM to e-mails sent from Outlook.
- To attach a shared document to an Outlook e-mail:
    - Log on to CRM from within Outlook.
    - In Outlook, select **New | Mail Message**. The new e-mail pane is displayed.
    - Click on the **Attach Shared Doc** button. The list of documents available on the Shared Documents tab is displayed in a new window.
    - Select the **Attach** check box for the document you wish to attach to the e-mail.
    - Select the **Attach** button. The selected document has been added to your e-mail as an attachment.

13.11 Filing E-mails from Outlook to CRM

- You can file e-mails from any folder in Outlook against records in CRM.
- When filing e-mails from Outlook to CRM, the plugin tries to match the e-mail address on the Outlook e-mail with an e-mail address in CRM. You can also select a batch of e-mails from any folder in Outlook and file them to CRM in a single action. When you perform a mass filing, CRM will look only for a match with the first e-mail address in the batch
- you have selected. If no match is found for the first e-mail address, you must manually match the e-mail batch to a record in CRM. When filing batches of e-mails, it is recommended that all e-mails in the Outlook-based batch have the same e-mail address.
- **Note**: When filing an e-mail from outlook to CRM, if the user selects a company or person, the e-mail will inherit the territory of either the company or person (in that order), depending on the users insert rights for those territories.
- To file an e-mail from your Inbox:
    - From your Inbox, highlight or select the e-mail you want to file in CRM.
    - Click on the **File Email** button when it becomes active. The File Email screen is displayed.
    - Use the search select advanced buttons on the screen to specify what records you want the e-mail filed against.
    - Check the settings in the Filing Options panel, and change them if you need to.
- **Status** The current status of the e-mail, i.e. Cancelled, Complete, Pending, or In Progress.
- **File By Date And Time** Select whether to file the e-mail by the original date and time the e-mail was received or by the current date and time.
- **Action** The action type under which to file the e-mail, for example, E-mail In, E-mail Out, or Meeting.
    - Click on the **File And View E-mail** action button in CRM.
- The E-mail In page is displayed. This gives you access to E-mail action buttons in CRM to reply to the e-mail straightaway from within CRM. This automatically logs the reply as a communication record against the Prospect / Lead / Opportunity.
- The File E-mail button returns you to the e-mail list in Outlook.
- If you select File And View E-mail for multiple e-mails, the Communications tab of the person you e-mailed is displayed.
    - Select the **Continue** button.
- The list of e-mails in Outlook is displayed. The filed e-mail has a check mark next to it showing it was successfully filed in CRM.
- You also can right-click on your Inbox in Outlook, select Open In New Window, and drag and drop e-mails directly onto the Document Drop icon in CRM. This method stores the whole e-mail as an attachment to the communication record. For more information on dragging and dropping, please refer to Document Drag and Drop.
- To file an e-mail while sending it from Outlook:
    - Log on to CRM from within Outlook.
    - In Outlook, select **New | Mail Message**. The new e-mail pane is displayed.
    - Fill in the e-mail address fields.
    - Click on the **Send And File** button. The File E-mail screen is displayed.
    - Use the Search Select Advanced buttons on the screen to specify what records you want the e-mail filed against.
    - Select the appropriate settings in the Filing Options panel.
    - Click on the **File E-mail** action button. The e-mail is filed in the CRM database against the record you specified.

13.12 Identifying E-mails Filed to or Received from CRM in Outlook 2002 and 2003

- By default, the standard message panes in Outlook 2002 and 2003 contain two CRM columns - CRM Email and CRM File. A check mark is displayed in the CRM File column when an e-mail is successfully filed to CRM. In the Outlook
- Inbox, a check mark in the CRM E-mail column indicates that an e-mail has been sent by a CRM contact. The CRM Email column is populated during synchronization. To show or hide these columns in any Outlook folder, click on the Show CRM View / Hide CRM View button. Flags are retained when e-mails are moved from one folder to another in Outlook. **Note:** This feature is not available with Outlook 2000.

13.13 Reinstalling the MS Outlook Plugin

- Your System Administrator may instruct you to reinstall the MS Outlook Plugin, for example, if CRM is upgraded with a new plugin.
- To reinstall the MS Outlook Plugin:
    - Select the **Preferences** tab.
    - Click on the **Reinstall CRM MS Outlook Integration** button.
- A dialog box is displayed, informing you that the new plugin will load next time you start MS Outlook.
- You can check the Plugin version from Internet Explorer. Select Tools | Internet Options | Settings | View Objects, then right-click on the CRM Outlook Plugin file and select Properties | Version.

13.14 Uninstalling the MS Outlook Plugin

- Your System Administrator may instruct you to uninstall the MS Outlook plugin.
- To uninstall the MS Outlook plugin:
- In Outlook, select **Tools** | **CRM** | **Uninstall**.
- A dialog is displayed communicating that the uninstall was successful. Click OK and Outlook will be closed.
- **Note**: The plugin cannot be uninstalled when User Account Control (UAC) is enabled in Windows Vista. To uninstall the plugin, a user with administrator privileges must temporarily disable UAC. After uninstalling, the administrator can re-enable UAC.

14 Working with Lists

FAQs
Show me how to:

- Send a mail shot.
- Schedule calls to a contact list.
- Send an e-mail to a list.
- Export a file.

14.1 Introduction to List Actions

- You can send out a mail shot or schedule several calls in a single action by using the Action buttons, which appear on the right-hand side of Search lists, Saved Searches, and the My CRM | Contacts list. If you have the appropriate rights security privileges you can also perform e-mail blasts on the same lists, or export data from these lists.
- This section explains how to use these actions.
- More advanced ways of carrying out multi-recipient actions on lists are available using the Groups and Campaign Management functionality. Please refer to Campaign Management and Groups for more information.

14.2 New Document

- This example shows you how to send a mail shot to all the people in the My CRM | Contacts tab.
- To send the mail shot out:
    - Select **My CRM**, then click on the **Contacts** tab. If the Contacts list is empty, select the **Add Contacts** or **Add Group Of Contacts** buttons to add people to the list. You can also add contacts from MS Outlook to this list. For more information, please refer to MS Outlook Integration.
    - Once you have a list of contacts in the Contacts tab, select the **New Document** action on the right-hand side of the page. **Note:** The New Document button available from the New menu button on the left-hand side of the page merges a single contact's details with a document template. The actions on the right-hand side of the screen will send the document to all contacts in the current list.
    - The Choose Letter Options page is displayed. For more information on these options, please refer to Managing Documents.
    - Select the **Continue** button. The Shared Templates list is displayed.
    - Select the template you want to use for this mail shot. The template is merged with the contact details of each of the contacts in the Contacts tab.
    - Print the letters at this point if you wish.
    - Return to CRM and complete the Communication details. A link to the communication record and document is stored against each contact.

14.3 New Task

- This example shows you how to schedule a call to all contacts where you are the Account Manager, and the where the contact is based in New York. This is carried out using the results of a search on the Person list.
- To schedule the calls:
    - Right-click or hover over the **Find** menu button, and select **Person**. The person Find page is displayed.
    - Type in the search criteria, for example, **New York** in the City field, and your name, for example **Susan Maye**, in the Account Manager field.
    - Select the **Find** action button on the right-hand side of the screen.
    - A list of people matching the search criteria is displayed. A new set of action buttons are also displayed on the right-hand side of the page. **Note:** You can also run actions on lists generated from Saved Searches. For more information Saved Searches, please refer to Finding Information.
    - Select the **New Task** button on the right-hand side of the screen.
    - **Note:** The New Task button available from the New menu button on the left-hand side of the page merges a single contact's details with a new task. The actions on the right-hand side of the screen will create a new task for each contact in the current list. The Enter Task Information page is displayed.
    - For details of all the fields on this page, except for the Scheduling Options, refer to Scheduling a Callback. For details of the Scheduling Options refer to Scheduling Follow-up Calls.
    - Complete the information for the scheduled task, and select the **Save** button. Pending tasks are displayed in the Calendar tab of the user they are scheduled for.

14.4 Send E-mail

- This example shows you how to send an e-mail blast to all contacts on a Saved Search list. In this example, the user has already created a Saved Search called Boston Contacts. For more information on Saved Searches, please refer to Creating a New Saved Search. **Note:** you must be have the appropriate security rights to use the E-mail action to multiple recipients. Contact your System Administrator for more information.
- To send the e-mails:
    - Right-click or hover over the **Find** menu button, and select **Person**. The person Find page is displayed.
    - Retrieve the Saved Search list by selecting the list from the drop-down list at the top right-hand side of the Find page. A list of people matching the saved search criteria is displayed. A new set of action buttons are also displayed on the right-hand side of the page.
    - Select the **New E-mail** button on the right-hand side of the screen. **Note:** The E-mail button available from the New menu button on the left-hand side of the page merges a single contact's details with an e-mail. The actions on the right-hand side of the screen will send an e-mail to each contact in the current list. The Send Mass E-mail page is displayed. All the fields on this page are explained in Sending Mass E-mails.
    - Complete the information for the e-mail blast, and select the **Send E-mail** button. The e-mails are sent out, and a link to the communication record is stored against each person on the list. The e-mail can also be retrieved from the communication record on the contact.

14.5 Export to File

- This example shows you how to export a list of companies to a file. In this example, you export a list of companies where you are the Account Manager, based on a Saved Search. For more information on Saved Searches, please refer to Creating a New Saved Search. **Note:** You must have the appropriate security rights to use the Export To File action.
- Contact your System Administrator for more information. If you do not have the rights to export a list using the action button, you may be able to achieve a similar result using a list report. Please refer to Running a Report.
- To export the list of companies:
  - Right-click or hover over the **Find** menu button, and select **Company**. The company Find page is displayed.
  - Retrieve the Saved Search list by selecting it from the drop-down list at the top right-hand side of the Find page.
  - A list of companies matching the saved search criteria is displayed. A new set of action buttons is also displayed on the right-hand side of the page.
  - Select the **Export To File** button on the right-hand side of the screen. The Export File Options page is displayed.
  - Choose how you would like the output of the export to appear. Select from **Spreadsheet (CSV)** or **Text**. The default is Spreadsheet (CSV).
  - Select the **Save** button. The output is displayed in spreadsheet format in a new browser window. From the new window, you can review the information and save by selecting **File | Save As**. You can also access the exported file from the My CRM | Shared Documents tab.

15 Groups

FAQs

Show me how to:

- Understand the scope of Group functionality.
- How groups are compiled.
- Access the Groups tab.
- Create a group.
- Create a group from the Groups tab.
- Create a group from the Wave Activities tab.
- Create a group based on a primary entity search.
- Add a primary entity record to a group.
- Add multiple records to a group.
- Add multiple records to a group using Find/Saved Search.
- Add multiple records to a group using advanced find.
- Add the records of one group to another group.
- Editing a Group.
- Perform a mass update on a group.
- Update group territories.
- Refresh a group.
- Understand how information generated through groups is stored.
- Process information generated using groups.
- Add a tab to hold information generated by groups.
- Export group information.
- View an exported group.
- Configure the system to send mass e-mails.
- Send a mass e-mail.

15.1 Introduction to Groups

- Groups functionality allows you to create, modify, and save lists of people, companies, leads, cases, and opportunities based on defined filter criteria. The filter criteria can be simple, for example, "All IT Managers in Dublin", or complex, for example, "All Marketing Managers in the Telecoms sector in London, Dublin, or Manchester, who attended our seminar last year, but who have not yet replied to our invitation mail shot".
- Groups also make use of the following features:
    - Groups can be generated based on views of equivalent flexibility and power as CRM reports can. Please refer to "View Customization" in the *System Administrator Guide* for more information.
    - Groups can be generated based on the Key Attributes functionality. Please refer to "Key Attribute Profiling" in the
    - *System Administrator Guide* for more information.
    - You can define how a group’s contents are sorted when it is displayed.
    - Overall navigation in and around groups makes use of forward and back buttons between pages and Go To page.

15.2 Technical Overview

15.2.1 Group Building.

- Groups are based on SQL views generated by queries that retrieve records selected according to specified entity IDs. The user can select the view to base the group on. These views can be added to and/or changed by the System Administrator in Administration | Customization | Views. The user can use any of the fields available from the view to filter the group result. The user can use Key Attribute Data for filtering purposes as well.

15.2.2 Group Storage.

- Groups can be static or dynamic. When a static group is saved, both the query that generated the group and the list of records it returned are saved. Whenever a user goes back into a static group, it returns the list of records that were saved. In other words, if more records matching the same criteria were added to CRM after the group was saved, they will not appear in the group.
- When a dynamic group is saved, only the query that generates the group is stored in CRM. Each time a dynamic group is opened, the query is run and the group contents are refreshed to return the CRM records that match the query criteria at that time.

15.3 Groups Tab

- Groups can be viewed and managed from the My CRM | Groups tab. The Groups tab will only appear in My CRM if your
- System Administrator has given you rights to access to the Groups tab via Administration | Users.

15.4 Creating a Group

- Groups can be created in the following ways:
  - From the Groups tab.
  - From the Wave Activity tab.
  - Based on a primary entity search.
  - When performing a Data Upload. Please refer to "Running the Data Upload" in the *System Administrator Guide* for more information.
  - From any search list results.

15.5Creating a Group from the Groups Tab

To create a new group from the Groups tab:

- Select the **My CRM** button.
- Click on the **Groups** tab.
- Click on the **New Group** button. The New Group Stage 1 of 4 page is displayed.
- Type a name and description for the group in the **Name** and **Description** fields.
- User Requirement: Info Manager Administration Rights
- Select which type of group you wish to create from the **Type** drop-down list. You can create a static or dynamic group.
- Select the main entity that the group is to be based on from the **Entity** drop-down list. All records within a group must be based on the same primary entity. When you select an entity the screen is refreshed to display the
- Source View drop-down list. Only views that return one row per ID field will be displayed.
- Select the **Source View** for the group and click on the Continue button. The New Group, is displayed.
- Select the columns that you wish to include in the group contents, search criteria, and sort order.
- Select the **Advanced Find** check box if you wish to create an advanced find query to generate the group. Please refer to Using Advanced Find for more information.
- You can also add Key Attribute Data to the selection fields of your group definition.
- Select the **Continue** button when you are ready to proceed. If you have added search criteria, the New Group, is displayed.
- Specify the Search Criteria you require.
- Click on the **Continue** button. The New Group, Stage 4 of 4 page is displayed.
- From this page you can toggle the **Include All** and **Exclude All** buttons on or off. The default is to Include All.
- Once you are satisfied with the group, select the **Save** button.
- **Note:** If you are creating a static group, you also have the option to click on the Save Empty Static Group button.
- This action will save the query that generated the group, but it will not save the list of records returned by the group.

15.6 Group Action Buttons

This table describes the Group action buttons.

Button	Description
New Document	This merges a standard template with the address and contact details of the recipients in the group.
New Task	Creates a task against each recipient on the group.
New E-mail	Sends an e-mail to each recipient on the group.
Export To File	Exports the group as a text or a CSV file. Exported groups can be viewed from My CRM | Shared Documents.
Mass Update	Displayed to System Administrators only. Please refer to Performing a Mass Update on a Group. Allows simultaneous updates to all records in the group.
Update Territory.	Displayed to System Administrators only. Please refer to Updating Group Territories. Allows an administrator to update territories for a group.
Include All	Available for static groups only. Toggles all members of the group to be included.
Exclude All	Available for static groups only. Toggles all members of the group to be excluded.

Button	Description
Refresh	Refreshes the group to include all people, companies, or leads who have been added since the creation of the group and who meet the search criteria.
Exclude Previous Recipients	Available for static groups only. If the group has already been used for an action, this button excludes the people, companies, or leads who were the targets of that action.
SQL	Displayed to System Administrators only. Displays a new window containing the current SQL used to generate the group. If you have SQL experience, this statement can be customized.

15.7 Creating a Group Based on a Primary Entity Search

- If you have groups access, you can create a group based on a search on any of five primary entities - Company, Person, Case, Opportunity, and Lead. For example, you might want to create a group based on the results of a search for all companies based in Chicago.
- A group can also be created based on the results of an Advanced Find search. Please refer to Using Advanced Find.
- To create a group based on a primary entity search:
  - Select **Find | Company**. The Company Find screen is displayed.
  - Type **Chicago** in the City field.
  - Click on the **Find** button. A list of companies based in Chicago is returned.
  - Click on the **Create New Group** button. The Create New Group dialog box is displayed.
  - Enter a name and description for the new group in the **Name** and **Description** fields.
  - Select who you would like to make the group available to from the Available To drop-down list. As an Info
  - Manager with Groups access, you can make groups available to other Information Administrators, or you can choose to keep the group for your own private use. As a System Administrator, you could also choose to make a group available to all users.
  - In the Type field, you can choose to make the group dynamic or static.
  - Select the **Save** button to save the new group.

15.8 Adding a Primary Entity Record to a Group

You can add a primary entity record (person, company, case, opportunity, or lead) to an existing group based on that entity directly from the entity summary screen. In this example, we will add a company record to a group.
Note: Primary entity records can only be added to static groups in this way.
To add a primary entity record to a group:

- Select **Find | Company** and locate the company you wish to add to a group.
- Open the company summary page.
- Click on the **Add This Record To A Group** button. The Add To Group dialog box is displayed.
- Select the group to which you wish to add the record from the **Select Group** drop-down list.
- Click on the **Save** button.

15.9 Adding Multiple Records to a Group

- Users with group access rights can add multiple records of the same entity type to any static group. You can add records by searching on a standard entity search screen, or you can search for records using an advanced search. You can also add all of the records of one group to another group, provided both groups are based on the same entity.
- When adding multiple records to a group, a notice will be displayed to alert you if you attempt to add a record that is already in the destination group.
- **Note:** CRM will not add records for which users do not have security rights, instead, users will be informed that the records are not available to the user.

15.10 Adding Multiple Records to a Group using Find/Saved Search

To add multiple records to a group using Find/Saved Search:

- Select **My CRM | Groups**.
- Click on the link for the group you wish to add records to. The Group Details screen is displayed.
- Click on the **Add Records To The Group** button. The Add To Group dialog box is displayed.
- Add Records Via Find / Saved Search is selected by default. Click on **Continue**. The Entity Search Screen is displayed.
- Search for the records you wish to add to the group using the filter options or by running a saved search.
- Click on the **Add To Group** button. A notification will be displayed to tell you how many records have been added to the group.
- Click on the **Continue** button to go to the Group Details page.

15.11 Adding Multiple Records to a Group using Advanced Find

To add multiple records to a group using Advanced Find:

- Select **My CRM | Groups**.
- Click on the link for the group you wish to add records to. The Group Details screen is displayed.
- Click on the **Add Records To The Group** button. The Add To Group dialog box is displayed.
- Select the **Add Records Via Advanced Find** radio button.
- Click on **Continue**. The Advanced Find page is displayed.
- Search for the records you wish to add to the group using the advanced find options or by running a saved search.
- Click on the **Add To Group** button. A notification will be displayed to tell you how many records have been added to the group.
- Click on the **Continue** button to go to the Group Details page.

15.12 Adding the Records of One Group to Another Group

To add the records of one group to another group:
1. Select **My CRM | Groups**.
2. Click on the link for the group you wish to add records to. The Group Details screen is displayed.
3. Click on the **Add Records To The Group** button. The Add To Group dialog box is displayed.
4. Select the **Add Another Groups Records** radio button.
5. Click on **Continue**.
6. Select the group whose records you wish to add from the **Groups** drop-down list.
7. Click on the **Save** button. A notification will be displayed to tell you how many records have been added to the group. **Note:** Duplicate records will not be added.
8. Click on the **Close** button to close the Groups dialog box.

15.13 Refreshing a Group

Let's say you set up a group of people based on the search criteria of City = Mumbai. You carry out a mail shot to that audience announcing an upcoming trade show. Meanwhile, your data entry people have been busy collecting new contact details of people in the Dublin area. These have been added to the system during the week after you sent the mail shot out.
Dynamic groups will refresh automatically, with new records that match the group search criteria being automatically added to the group. With a static group, you must use the Refresh button to add new matching records to a group.
With a static group, when performing a mail merge, you can use the Refresh button to send a similar mail shot to all the people who have since been added to the system.
To refresh a static group:

- Create a new group of people based on a criteria, such as City = Mumbai.
- Open the group and perform a mail merge using the **New Document** button.
- Add three new people to the system, making sure they meet the search criteria you used for the group generation.
- Open the group, and make a note of the number of people on it, for example 23.
- Click on the **Refresh** button.
- The number of people should be as before plus three, for example 26.
- If the mails shot you are sending out is exactly the same as the one you have already sent, you do not need to resend it to all the previous recipients.
- Select the **Exclude Previous Recipients** button.
- The list should still show 26 people, with 23 excluded.
- Now you can carry out the mail merge using the **New Document** button, and it only goes to the three new contacts.

15.14 Editing a Group

You can edit certain fields in both static and dynamic groups.
To edit a group:

- **User Requirement:** Info Manager Administration Rights
- Select the **Groups** tab.
- Open the group that you want to edit. The Group Details page is displayed.
- Click on the **Change** button. The Group Stage 1 of 4 is displayed. You can edit several group attributes on this page.
- Select **Continue** to move through the editable group attributes.
- When you have reached the Group Stage 4 of 4 page, click on the **Save** button to save your changes.

15.15 Performing a Mass Update on a Group

- The ability to perform a mass update on a group is available only to System Administrators, and this option must first be enabled on the System Behavior page. Please refer to "System Settings" in the *System Administrator Guide* for more information.
- The mass update option allows you to simultaneously update the same fields in selected records within a group. For example, say four people in a group of contacts have moved from the Europe region to the US East region. Using the mass update function, you can simultaneously update the region field for all four records.
- **Note**: The System Administrator should ensure they have a full backup of the database before carrying out a mass update.
- To perform a mass update on a group:
  - Select the **Groups** tab.
  - Open the group that you want to update. The Group Details page is displayed.
  - Select the appropriate **Exclude** check boxes to exclude any records that you do not wish to update.
  - Select the **Mass Update** button. The Fields page is displayed. This page displays all the fields common to the records selected on the Group Details page.
  - Select the fields you wish to update. For this example, select the Region field.
  - Click on the **Continue** button. The Region drop-down list is displayed.
  - Select the region you wish to update the records to, for example, **US East**.
  - Click on the **Save** button. A warning is displayed to tell you how many records will be affected by the update.
  - Click **OK**. The Summary Of Updated Records page is displayed.
  - Select the **Continue** button. The selected records have now been updated.

15.16 Updating Group Territories

- The ability to perform an update on group territories is available only to System Administrators, and this option must first be enabled on the System Behavior page. Please refer to "System Settings" in the *System Administrator Guide* for more information. The update territories option allows you to update simultaneously the territory field in selected records within a group. For example, say you have a group of contacts that have been assigned to various territories in the US and you would like to update the entire group to the US Canada territory.
- **Note**: The System Administrator should ensure they have a full backup of the database before carrying out a mass update. It is also recommended that all users are logged out of the system before carrying out a territory update.
- Please refer to the *System Administrator Guide* for more details.
- To update group territories:
  - Select the **Groups** tab.
  - Open the group that you want to update. The Group Details page is displayed.
  - Exclude any records that you do not wish to update.
  - Select the **Update Territory** button. The Territory page is displayed.
  - Select the new group territory from the **Territory Name** drop-down list. For this example, select US Canada.
  - Click on the **Save** button. The Summary Of Potential Update Records page is displayed.
  - Click on the **Go** button. The Summary of Updated Records page is displayed.
  - Select the **Continue** button. The selected records have now been updated.

15.17 How Group Information is Stored

- Information generated by static groups is stored in Key Attribute Data. This occurs in two ways:
- When you create a static group and save it, the group—and all its "records" (that is, Companies, People, Leads, Opportunities, or Cases) are saved with a piece of key attribute data, which identifies the group and all its members. The saved group can be viewed from Administration | Advanced Customization | Key Attributes | Categories under the Group Entries category.
- The key attribute field, which is stored against the group member is set to either Include or Exclude.
- When you perform an action against records in either a static or dynamic group, the action—and all the records
- in the group it was carried out on—are saved with a piece of key attribute data. The actions can be viewed from Administration | Advanced Customization | Key Attributes | Categories under the Default Activities category. The key attribute data field, which is stored against the group member is set to the Date that the action was carried out.

15.18 Key Attribute Data Generated by Groups

The following example illustrates how to work with key attribute data generated by static groups. You must have System Administrator rights, or Info Manager with Key Attributes rights to follow these steps.

- Create a new static group of people where the Title Code = IT Manager.
- Select the **Continue** button, and select the columns you want to display in the group.
- Select the **Continue** button and set the search criteria to IT Manager. The New Group is displayed.
- Select the **Continue** button. The New Group Stage 4 of 4 page is displayed.
- Select the **Save** button.
- The page is displayed with a Group Saved bar at the top.
- Select **Administration | Advanced Customization | Key Attributes | Categories**. The Key Attribute Categories list is displayed showing the saved group you created as a child category of the Group Entries category.
- Now return to **Main Menu | My CRM** and select the Groups tab.
- Click on the hyperlink of the group you created.
- Select the **New Task** button to schedule a phone call to each person in the group. The New Task page is displayed.
- Complete the communication details, and select **Internal Actions** on the Parent Category panel at the end of the page.
- Select the **Save** button. A communication is scheduled for each person in the group, and you are returned to the Build List.
- Select **Administration | Advanced Customization | Key Attributes | Categories**. The Key Attribute Categories list is displayed showing the action against the group as a child category of the Default Activities | Internal Actions category.
- Because the saved group and the actioned group are stored in this way, you can now report on these entries and create further groups based on them for future or follow-up actions or reports for analysis of past groups.

15.19 Adding Group List Information to a Tab

- You can review and change static group data from the record level that it is stored against. For example, if you want to view all actions (mail merges, e-mail blasts, and so on) carried out against a particular person, or see what Groups they are members of, you can display this key attribute profiling data on a tab within the person context. The Key
- Attribute Profiling chapter in the *System Administrator Guide* gives more information on exactly how to do this, but the summary steps are listed below.
- You must have System Administrator rights, or Info Manager with Key Attributes rights to follow these steps.
    - Select **Administration | Advanced Customization | Key Attributes | Category Groups**, and make sure that **General Category Groups** is selected in the list.
    - Click on the **New** button.
    - Enter a name and description for the Category Group, for example, **Group Information**.
    - Select the categories, for example, **Default Activities** and **Group Entries**, that you want to be displayed within this category group from the Key Attribute Categories list and move them over to the Categories Within Group list.
    - User Requirement: Info Manager Administration Rights
    - These are at the upper level of the Key Attribute Categories list. You could start much lower down the child categories to display more specific information relating to a particular set of actions or groups.
    - Select the **Save** button to display the new category group.
    - To display the information on a tab within the context of a person, select **Administration | Customization | Person| Tabs**.
    - Click on the hyperlink of the **Person** tab group. The Customize Tabs page is displayed.
    - Add a new tab, with the Action set to Key Attributes, and the Key Attribute Category Group set to the category group you have just created.
    - Select the **Add** button, then click on the **Save** button.
    - Search for a Person, who is already on one of the groups you have created, and where you have carried out an action against that group.
    - Click on the **hyperlink** of the person.
    - Select the new tab you have created. The key attribute data representing the group membership and actions carried out is displayed on the tab. This information can be manually edited to change, for example, a particular person from being Included in a group to being Excluded.

15.20 Exporting Group Information

- You can export a group to a CSV or text file. If a group is exported to a CSV file, it will be saved in the My CRM | Shared
- Documents tab. When exporting a group to a file, the type of communication record created will depend on the type of entity the group is based on. When a group is based on the Person or Company entities the communication that is created is linked to each contact in the group and a record of the group export will appear on the Communications tab of every person or company in the group. However, when a group is based on the Opportunity or Case entities a single communication containing a link to all of the relevant opportunities or cases is recorded in the calendar of the user who has performed the export.
- To export a group:
    - Select **My CRM** | **Groups**.
    - Click on the hyperlink for the group you wish to export. The Group Details page is displayed.
    - Click on the **Export To File** button. The Export Group page is displayed.
    - Select either the **Spreadsheet (CSV)** or **Text** option and then click on the **Save** button.
    - Once the list has been exported, you can view it or save it to a location of your choice.

15.21 Viewing an Exported Group

- When a CSV file is exported from a group, it is added to the document library, and can be viewed from the Shared Documents tab.
- **User Requirement:** Info Manager Administration Rights
- To view an exported group:
    - Select **My CRM** | **Shared Documents**. A list of your shared documents is displayed.
    - Click on the hyperlink of the exported group that you wish to view.
    - Click on the **View Attachment** button. The CSV file is opened in a new browser window.

15.22 Sending Mass E-mails

- Mass e-mails can be in text or HTML format, and they can contain file attachments and inline images. You must have the Send E-mail As HTML field set to Yes (in Administration | Email And Documents | Email Configuration) to upload an inline image.
- **Configuring CRM for Mass E-mails**
- Once the Embedded E-mail Editor is configured, you can use the Mass E-mail functionality. However, if you want the ability to send e-mails in HTML format, you will need to make sure the system is configured to do so. You will also need to ensure that the required From and Reply To addresses have been specified.
- To ensure that HTML e-mails can be sent to groups:
  - Select **Administration** | **E-mail And Documents** | **E-mail Configuration**. The E-mail/SMS settings page is displayed.
  - Check that the **Send E-mail As HTML** field is set to **Yes**. If you don't have a requirement to send HTML e-mails, the
  - Internal SMTP option can be chosen.
- To ensure that From and Reply To addresses have been specified:
  - Open **Administration | E-mail And Documents | E-mail Aliases** and select the **New** button. A list of e-mail addresses that e-mails can be sent from is displayed. If the entry for the e-mail address you want to send mass e-mails from is not listed, you will need to set up an entry for it.
  - Click on the **hypertext** link of the mailbox you want to use to send mass e-mails from, and select the **Change** button. In this example, the Marketing mailbox is being used.
  - Ensure that the E-mail Address and Display Name fields are completed and that From and Reply To addresses are enabled and specified.
  - Select the **Save** button.

15.23 Sending E-mails to Groups

To send an e-mail to a group:

- User Requirement: Info Manager Administration Rights
    - Select **My CRM | Groups**, and select the hypertext link of the group you want to send the mass e-mail to. The Group Details page is displayed.
    - Select the **New E-mail** button. The Send Mass E-mail page is displayed.
    - If you want the mass e-mail to be based on an existing template, select it from the **Template** field.
    - Select the **From** address you want to use in the **From** field. Options available will depend on available mailboxes and your security rights.
    - Type the subject of the e-mail in the **Subject** field.
    - You can include information in different formats in the body section.
- You can type a message in standard text, and use the formatting buttons to format the text.
- You can copy HTML content and paste it into the body field.
- HTML source code typically references image files, such as JPGs, GIFs and BMPs. Ensure that such images are referenced correctly so that the person receiving the e-mail can view them. The source of the image files must be specified in the HTML source code as paths on the Internet, for example, <img src = "http://www.domain.com/products/image.gif">. If you do not have experience in writing HTML source code, you should ask the person creating the HTML source to ensure that the images are referenced in this way in the
- HTML file before you use it in your mass e-mails. If you are an experienced HTML author, you can edit the content you copied into the body of the e-mail by selecting the Edit Source button. This button is located beside the formatting buttons. When you select it, the HTML source is displayed.
- You can add a .gif, .jpeg, or .jpg file as an inline image. An inline image is an individual image that is included in the e-mail body. Inline images are displayed in the e-mail body, and they are referenced from the e-mail server in the HTML source. To upload an inline image, navigate to the image file using the Browse button, select the image file, and click the Upload Inline Image button. The image then needs to be referenced within the HTML in order to be displayed in the body of the e-mail. You can edit the HTML source by selecting the Edit Source button and amending the script.
- You can attach global documents and local files. To attach a global document, use the Search Select icons to locate the file, select the file and then select the **Upload Attachment** button. Please refer to Search Select Advanced for details on using the Search Select buttons. To attach a local file, select the **Browse** button, navigate to the file, and select the **Upload Attachment** button.
    - Once you have added content in the e-mail body, you may want to specify additional rules for saving the communication in the database. The option to specify additional rules is not available if you are using E-mail Management to handle outbound e-mails. From the Communication Options panel, select the team and territory in which you want the communication to be saved from the Team and Territory fields, respectively. In addition, specify the status and the type of communication you want the e-mail saved as from the Status and Action fields.
    - If you want to link the mass e-mail to a Wave Activity, select it using the Wave Activity field.
    - If you select **E-mails** from the Parent Category selection field, a new category is automatically created in Key Attribute Profiling as a "child" category of eMails, when the e-mail is sent. The name of the category corresponds to the text you typed in the subject field, for example, CRM Offers. This "child" record stores a link

to every recipient of the e-mail. This means that this piece of key attribute data can itself be used as a selection criteria for a follow-up action to this e-mail.
    - Before you send the completed e-mail to the group, you can send a test e-mail to yourself. This enables you to make sure the content looks the way you want it to look when it is in an e-mail. To do this, select the Send Yourself A Test Email button.
- When the e-mail appears in your Inbox, open it and review it to make sure it appears in the way you want it to.
    - Select the **Send E-mail** button to send the e-mail to all people or companies included in the group. A dialog box is displayed to inform you of the number of e-mails you are about to send.
    - Click **OK**. Select the **Marketing** | **Mass E-mail Status** tab to review the status of the job.
    - At this point, you can temporarily stop the mailer if you wish and resume it later. To do this, select the **Stop** button from the Actions column. The current mailer details remain on the status list until it is resumed and has gone to everyone in the group.
    - Select the **hypertext** link in the subject column to view details of the communication.
    - Select the **Click Here To View Recipients Of The Mass E-mail** hypertext link to view a list of people that the e-mail was successfully sent to.
    - Close out of the list and then out of the communication.
    - Select the **Resume** to finish sending the mailer. When all e-mails have been sent successfully, the status bar at the top of the Mass E-mail Status tab displays the following message: "There are no pending mass E-mails". If problems are encountered sending the e-mail, the problem is included on the status list, and you can troubleshoot the problem if you need to. The e-mails sent to the group are saved as communications against the person and/or company that they are sent to. It is also saved against the team and territory you specified on the Communication Options panel and according to the status you selected. You can now review any of the sent emails if you wish.
- To review a sent e-mail:
    - Find a person or company to whom you sent a mass e-mail and open the communication.
    - You can convert the e-mail to an opportunity, lead, or case. If the e-mail was linked to a Wave Activity, you can select the Change button and register a response to it. Note that to register a response, you must open the Email Out from the Communications list in the Person or Company context.

16 Running Reports

FAQs

Show me how to:

- Find the sample reports available in the system.
- Run list, cross tabular, historical, and summary reports.
- Save report search criteria.
- Adding favorite reports.
- Change the report display options.

Sample Reports

A standard installation includes sample reports in the following categories:

- Activity
- Communications
- Customer Service
- General
- Lead
- Marketing
- Sales
- Administrator
- Campaigns
- Outbound Calls

16.1 Running a Report

There are three types of standard report:

- **List**. Creates rows and columns of information based on the criteria selected.
- **Cross Tabular**. Creates a record count across an X and Y axis based on the criteria selected.
- **Historical**. Creates a report giving a static view of a record at previous points in time.
- **Summary reports**, which show a quick overview of account information, are available from the Summary tabs of:
    - Companies
    - People
    - Opportunities
    - Cases

If you have appropriate permissions you can also generate report output from any search list, saved search, or group.

Find out more on running reports in:

- Example: Company List by Segment (List)
- Example: Activities Logged Report by User (Cross Tab)
- Example: Opportunity Closing History (Historical)
- Example: Person Summary Report
- Example: Exporting a Company List from a Search List

16.1.1 Example: Company List by Segment (List)

- This report shows a simple list of companies in selected industry segments. For example, all companies in the
- Computer - Software segment. To run the report:
    - Select the **Reports** button. The Reports page is displayed.
    - Select the **General** report category.
    - Click on the **hypertext link** of the report called Company List by Segment or select the **Run** button. The Display
- Options and Search Criteria page is displayed.
    - The default display option is to display the report output on-screen. Leave the on-screen option selected for this example.
    - Select the criteria for the report. If you leave the search criteria blank, the default is set to match all the permitted values. To select multiple criteria on the right-hand side of the panel, hold the Ctrl key and select the individual entries.
    - Click on the **Go** button. The Company List by Segment report is displayed in a new window. The Search Criteria are displayed at the top of the report output.
    - The report output page may contain hyperlinks from the data to the corresponding Summary page. If it does contain hyperlinks you can, for example, select a company name from the report output page and you are taken to the Summary page of that company.
    - You can navigate between pages of a longer report using the navigation buttons at the top of the page. The first page of the report is displayed as soon as it is generated, with arrows at the top to go to the next or last page. If you click on the next or last page buttons before those pages have been generated, a message is displayed to inform you that the page is not ready. Once the whole report has been generated, a Go To Page icon is displayed at the top of the page, and a Print icon is also available. The navigation buttons are defined in the report builder by the System Administrator or a user with report editing rights.
    - To close the reports page, close the window displaying the report output.

16.1.2 Example: Activities Logged Report by User (Cross Tab)

- This report shows the number of different types of communications logged by specified Users. The search criteria includes the Date/Time field from the communication, so that you can review, for example, all communications logged for your team over the last month. To run the report:
    - Select the **Reports** button. The Reports page is displayed.
    - Select the report category Activity Reports.
    - Click on the **hypertext link** of the report called Activities Logged Report by User, or select the Run button. The
- Display Options and Search Criteria page is displayed. The search criteria are combined with logical "AND"s—that is, only activities meeting both the Date/Time and User criteria are returned.
    - Select the criteria for the report. For the Date/Time Search Criteria, you can choose several different date range criteria. For example:
- An exact date combined with an operator—for example, =, < >, or =>.
- A specific date range (Between).
- A relative date, for example, Current Quarter, Next Month, Previous Week—these are all relative to today’s date.
- A given date, for example, any Monday between the 1st of November and the 30th of November.
    - Select the users whose activities you want to report on.
    - Click on the **Go** button. The report output is displayed in a new window. This report includes a chart graphic.

16.1.3 Example: Opportunity Closing History (Historical)

- This report shows opportunities that were opened during the specified time period, for example, 1st July 2005 to 31stmJuly 2005. A further search criteria of Opportunity Status can be added to show, for example, all opportunities opened between 1st July 2005 to 31st July 2005, which were subsequently Won during that time period or after. To run the report:
    - Select the **Reports** button. The Reports page is displayed.
    - Select the **Sales** report category.
    - Click on the **hypertext link** of the report called Opportunity Closing History or select the **Run** button. The Display Options and Search Criteria page is displayed.
    - Select the criteria for the report.
    - Click on the **Go** button. The report output is displayed in a new window. The total number of opportunities opened from the 1st of July to the 31st of July, which were subsequently won, is the number shown on the last week of the selected time period (not the total of all the weeks). The weekly totals give you a point-in-time snapshot for the whole "opened" period being measured.

16.1.4 Example: Person Summary Report

- You're off to meet Arthur Browne from Design Right, and want a quick one pager on all recent activities and key contact details. To run the report:
    - Right-click on or hover over the **Find** menu button, and select Person.
    - Type in Arthur's details, and select the **Find** action button.
    - Click on the hyperlink of the person you want to report on.
    - Select the **Summary Report** action button. The person's summary details are displayed in an Adobe PDF file.
    - Select the **Print** icon to print this out and take with you to the meeting.

16.1.5 Example: Exporting a Company List from a Search List

- If you are an Info Manager, you can quickly create a list report in CSV or Text file format from any search list, saved search, or group.
- To export a company list from a search list:
- Select **Find | Company** and search for all companies in the system that are assigned to you and are located in Dublin city.
- Select the **Export To File** action button.
- Type in a name for the file, and select the format you want the file to be produced in, for example Spreadsheet (CSV) or Text.
- Select the **Save** button. The list of companies is exported to a CSV or text file.

16.2 Saving Report Search Criteria

- If you regularly run reports using the same search criteria—for example, monthly activity report for Damien, John,
- Kylie, and Susan—you can save and re-use the search criteria selected. To save reporting search criteria:
  - Select the **Reports** button.
  - Select a report category from the context area of the screen. For example, Activity Reports.
  - Click on the **Run** button next to the report you want to run. For Example, Activities Logged Report by User. The Display Options and Search Criteria page is displayed.
  - Select the search criteria, and click on the **Save** button. You are prompted to enter a name for the Saved search.
  - Selecting the Available to All Users check box will make the saved search available to all users.
  - Enter a short description for the search, for example, **Telco Team Monthly**, and select the Save button. When you return to the list of reports, the saved search criteria is displayed in a list next to the report.
- To run the report using the saved search criteria, select the Run button next to the search criteria. To edit or delete a saved search, select the Edit button next to the saved search.

16.3 Adding Favorite Reports

- You can group reports that you work with regularly in your own personal reports category. To add a report to the My
- Favorite Reports category:
    - Select the **Reports** menu button. The page of existing report categories is displayed.
    - Select the category where your favorite report is.
    - Select the **Favorite** check box next to the report you want to add to the My Favorite Reports category.
    - To view your favorite reports, select the **My Favorite Reports** category. A list of all reports you have marked as Favorites is displayed.

16.4 Changing the Report Display Options

- You can display a report:
    - On-screen in CRM.
    - As an Adobe PDF file.
    - As a *.CSV file.
- Find out more on the following report display options:
    - Adobe PDF
    - CSV File

Adobe PDF

- To display report output in Adobe PDF format:
- Select the **Print Preview** option from the Display Options panel.
- The output is displayed in Adobe PDF format. **Note:** You must have the Adobe Acrobat Reader on your machine to view this type of report output. The Reader can be downloaded from http://www.adobe.com.

CSV File

- To display report output in Comma Separated Value (CSV) file format:
- Select the **Export (CSV)** option from the Display Options panel.
- The output is displayed in a CSV file format.

17 Writing Reports

FAQs

Show me how to:

- Understand the scope of the reporting functionality.
- Understand the fields and buttons when I'm creating a new report or changing an existing one.
- Add a new report category.
- Move a report to a different category.
- Create a list report.
- Add a chart to a report.
- Create a cross tabular report.
- Create a historical report.
- Add a new report style.
- Delete a report.

17.1 Introduction to Writing Reports

- When creating a new report, you can make use of the following features in the report editor:
  - An extensive list of Report Sources, which can be further expanded by using the Views Customization functionality.
  - Choice of List, Cross Tabular, or Historical report types.
  - The ability to add a Chart to the report.
  - Use of sums, averages, groups, and record counts.
  - The ability to format data in the reports to make use of hyperlinks and number formats.
  - Display header and footer information, such as the user who has run the report and the date/time it was run.
  - Rows Per Page setting on List reports to improve the layout of the report output.
  - Private reports, available only to the user who created the report.

17.2 Creating a New Report Category

- A user who has rights to create new reports can create new report categories.
- To create a new report category:
    - Click on the **Reports** menu button. The Reports page is displayed.
    - Click on the **New Report Category** button. The New Report Category page is displayed.
    - Enter a **name** and a **description** for the new report category and select **Save**. The new report category is displayed.
    - The report name and description can be translated into other languages from Administration | Customization | Translations. Please refer to the *System Administrator Online Help* for more information on maintaining translations.
    - User Requirement: Info Manager Administration Rights
    - To delete a report category, change the order of the report categories, or change the graphic displayed next to the report category, you need to be a System Administrator. The changes can be made in Administration |
    - Advanced Customization | System Menus. Please refer to the *System Administrator Online Help* for more information.

17.3 Moving a Report to a Different Category

- Reports can easily be moved from one category to another.
- To move a report to a different category:
    - Click on the **Reports** menu button. The Reports page is displayed.
    - Select the category that contains the report you wish to move.
    - Click on the **Edit** button for the relevant report. The Report Options, is displayed.
    - Select the new report category from the Report Category drop-down menu.
    - Click on the **Continue** button. The Search Criteria for Report page is displayed.
    - Select the **Continue** button. The Report Options, is displayed.
    - Select the **Save** button. The report is moved to the selected report category.

17.4 Creating a List Report

Example: Person List

- This example creates a list report, which shows People and their associated contact details.
- Report columns should include:
    - Person : Last Name
    - Person : First
    - Person : Salutation
    - Person : Title
    - Address : City
    - Person : Business E-mail
    - Person : Area Code
    - Person : Phone
    - Company : Company Name
- Further specifications include:
    - **Sort On**—Person : Last Name, Company : Company Name
    - **Search Criteria**—Person : Title Code, Company : Territory, Company : Account Manager

To create the report:

- User Requirement: Info Manager Administration Rights
- Select the **Reports** button. A list of report categories is displayed.
- Select the category in which you want to create and save your report, for example, **General**.
- Select the **New** action button. The Report Options, Step 1 of 2 page is displayed.
- Complete the Report Details panel. When you select the **Source View**, the page is expanded to show the Select Column panel and a panel showing lists of columns for Content, Searching, Sorting, and Grouping.
- Select the columns you want to make up the Report Contents.
- If you want any of these columns to make up the Search or Sort criteria, or if the report should be Grouped by any of them, click on the corresponding button. Please refer to Report Fields and Buttons for details on the available buttons.
- Select the **Add Key Attribute Data** button. A new browser window, Add Key Attribute Data, is displayed.
- Select the column, field, and entity to report on, then add to either the Report Contents, Search Criteria, or both.
- Select the **Continue** button to return to the Report Options, Step 1 of 2 page.
- Select the **Continue** button to proceed to the next stage. The Search Criteria for Report page is displayed.
- If you want the report output to show, for example, only People where you are the Account Manager, you can specify this information on this page.
- Select **Continue**. The Report Options, Step 2 of 2 page is displayed. The page is made up of multiple panels relating to report formatting. Please refer to Report Fields and Buttons for more details.
    - Title Settings
    - Header Settings
    - Summary Settings
    - Footer Settings
    - Sort Orders
    - Column Formatting
    - Chart Options
- Complete the information on the panels and select the **Save** button. The new report is displayed in the list of reports.
- To run the report, select the **Run** button or click on the hyperlink of the report. The Search Criteria page is displayed.
- Select your search criteria and click on the **Run** button to continue, or **Save** to save the selected search criteria before continuing. The report is displayed in a new browser window, showing the pagination details at the top of the page. The search criteria are displayed at the top of the report output.

17.5 Report Fields and Buttons

The table below explains the fields on the Report Details panel.

Field	Description
Name	The name of the report. This must be unique within all users and categories.
Source View	The name of the view that is used for this report.
Report Type	Select from List, Cross Tab, or Historical.
Report Style	Select from Standard With Grids or Standard Without Grids. The gridlines appear on the chart section of your report output. The System Administrator can define further styles and make them available from this field.
Rows Per Page	When the Report Type is set to List, this option is displayed, making the report output display on separate pages. Enter the number of rows you want to see per page. When the rows per page is set, the first page is displayed as soon as it is generated, with arrows at the top to go to the next or last page. If you click on the next or last page buttons before that page has been generated, a message is displayed, advising that the page is not yet ready. Once the whole report has been generated, a Go To page icon is displayed at the top of the page. A Print Preview icon is also available, which opens a new window containing the full report as a PDF. A page break is inserted according to the rows per page defined. Note that the rows per page does not count the report header, title, footer as rows. For example, 20 rows per page means 20 rows of data per page, including total lines, blank lines, and charts.
Description	A free text description of the report.
Private Report	If checked, then only the user who created the report can see the report in the Report list.
Auto Hyperlinking	Creates hyperlinks from the content in the report columns to the record in CRM. For example, click on hyperlink of Company Name on the Report Output page, and the Summary page of the selected Company is displayed.
Show Original Currency Values	Displays the currency values entered in the system, rather than the user's preferred currency.
Filter By Current User	Allows the user creating the report to limit the returned data to be applicable to the current logged on user. For example, the report output of a Communication List report, will automatically be restricted to show Communications scheduled for the logged on user.

Field	Description
Filter By User's Primary Team	Allows the person creating the report to limit the returned data to be applicable to the logged on user's Primary Team. For example, the report output of an Opportunity List report will automatically be restricted to show Opportunities assigned to the Primary Team of the logged on user.
Filter By User's Home Territory	Allows the person creating the report to limit the returned data to be applicable to the logged on user's Home Territory. For example, the report output of an Opportunity List report will automatically be restricted to show Opportunities in the Home Territory of the logged on user.
Select Distinct Values	Removes duplicate rows in the report output. For example, if you have a report that lists all companies that have "High" priority Cases, and there are two high priority Cases with the company Design Right, Design Right appears twice in the report output. However, if you choose the option Select Distinct Values for this report, Design Right only appears once.

The buttons on the Select Column panel on the Report Source page are explained below.

- **Add To Report Contents.** Adds the column to the Report Contents list. These will make up the report columns (the first item in the list will make up the first report column on the left hand side of your report, the second item the next column along, and so on).
- **Add To Search Criteria.** Adds the column to the Search Criteria list. These will be the criteria that you can filter your report output by. In the example above, selecting Assigned To as a search criteria means that when you run the report, you can decide to view opportunities for just one or a selection of Sales Reps. In the report designer, you cannot delete fields from the Search Criteria list if the report has saved searches. Please refer to the Saving Report Search Criteria for more information.
- **Advanced Find**. Allows you to use the Advanced Find feature to create the report. When Advanced Find is selected the next screen displayed will be the Advanced Find page, where you can create complex queries to return specific report results. For more details on using advanced find, please refer to Using Advanced Find.
- **Add To Sort On.** Adds the column to the Sort On list. The report will be sorted by this column. If there are multiple columns in this list, the report will sort first by the column at the top of the list, then by the next column. Note that if you have added Group By columns, these will make up the "primary" sort order. The columns within the Sort On list determine the sort order within the group.
- **Add to Group By.** Adds the column to the Group By list. The report results will be grouped by the columns in this list. In the above example, the opportunity list is grouped by Sales Rep (Opportunity Assigned To). Note that you do not need to select the Group By column as one of the Report Contents columns. The Group By selection creates its own column as the very first left hand column of the list report.
- **Add Key Attribute Data.** Key Attribute data can also be added to the report. For example, if you have Key Attribute data set up to track subscribers to a Partner Newsletter, this can be included in the report contents.

Fields on the report formatting panels (Title, Header, Summary, Footer, Sort Orders, and Column Formatting) are described below:

Field	Description
Left Content (Header)	The header appears at the very top of the report before any other details. The header and footer are divided into three sections; left, center, and right. The same set of options can be displayed on each section: Date. Current date, formatted according to the user's preferences. Date Time. Current date and time formatted according to the user's preferences. Logo. Displays a logo. The logo must be a file called "logo.jpg" located in the Reports directory. There is also a file called pdflogo.jpg in the same location. The system uses the pdflogo.jpg for Adobe PDF output (usually a higher resolution image), and logo.jpg for on-screen output. The logos are not used in CSV or MS Excel output. Page Number. Displays the page number on HTML and Adobe reports. Report Title. Displays the title of the report. Time. Current time, formatted according to the user's preferences. User Name. The name of the user who is running the report.
Centre Content (Header)	See above.
Right Content (Header)	See above.
Show Summary Data	If checked, the grand totals are displayed.
Left Content (Footer)	The footer appears at the very end of the report underneath all other details. See above.
Centre Content (Footer)	See above.
Right Content (Footer)	See above.
Group Orders	This section is only displayed if columns have been added to the Group By list on the Report Options, Step 1 of 2 page. See "Sort Orders" below for an explanation of the three columns.
Sort Orders	This section is only displayed if columns have been added to the Sort On list on the Report Options, Step 1 of 2 page. Each field is listed in a grid in three columns. The first column displays the name of the field and the second column displays a check box with the column heading "Descending". If this check box is selected, the field is sorted in descending order. The default is in ascending order. The third column gives you the option to sort by Caption Order or by Translation Order. When you create drop-down list captions, it is possible to specify the order that they appear in using the Caption Order field in Translations. This is the order that will be used if you select Caption Order. Translation Order is the alphabetical order of the actual translation of the column in the language of the user running the report. If neither is selected, the default is alphabetically on the Caption Code.

Field	Description
Column Formatting	This section lists all of the columns (except Group By columns) that are displayed on the report. For each field listed there are three options. The first option is the name of the field, the second option allows you to specify a total for the column. There are five types of totals, Average, Count, Maximum, Minimum, and Sum. All five types are available if the field is a numeric field. For non-numeric fields only Count is available. The third option is for alignment, there is a radio-group with three options: left-justify, center-justify, and right-justify.

The table below explains the fields in the Chart Options panel.

Field	Description
Show Chart	Check to show a chart.
Available On Dashboard	When checked, the chart is available for selection from the Report Charts category on the Dashboard. Refer to Adding Report Charts to a Dashboard for more information.
Chart Style	Indicates the type of chart you want to display. For example, Line, Bar, Horizontal Bar, Pie, Area, Point, or Fast Line.
Show Legend	Toggles the legend display on or off.
Legend Alignment	Aligns legend bottom, top, left, or right.
Value	Indicates what column is to be used for the left axis of the chart.
Label	Chart label for the left axis. If this is blank the translated field name is used.
Function	Indicates what totalling function to use on the left field. The returned values of the left field must be numeric. Valid options for this field are Average, Count, Minimum, Maximum, and Sum. Only numeric fields have all five options, non-numeric fields only have the Count option. Because the returned value must be numeric, non-numeric fields always have the Count option selected. Numeric fields can also specify no totalling since the underlying field value is numeric.
Category	The field to be used for the bottom axis of the chart.
Label	The caption to be used for the bottom axis. If this is blank the translated field name is used.
Function	Only applicable if the Category field is a date/time field. Allows the value of the field to be split up into date ranges like month names.
Group By	If a Group By option was selected in the Report Options Step 1 of 2 page, this field is displayed on the Chart Options panel. It displays a separate chart per grouping.
Multi-Bar	If the Group By field is filled in the Chart Options, a further field, Multi-Bar, is displayed. This displays all the groups on each chart.

17.6 Adding a Chart to a Report

- The Chart Options section of the Report Options, Step 2 of 2 page allows you to add and define a chart for your report.
- The chart uses the same view as the rest of the report, but you can specify different fields for the chart than you did for the report.

17.6.1 Example: Forecast Value by Sales Rep

- This example demonstrates how to add a chart to an opportunity list report to show the Total Forecast Value by Sales Rep as a horizontal bar chart.
- First, create the list report based on the Opportunity Summary Report Source according to the following specifications.
- Report columns should include:
  - Company : Company Name
  - Person : Person
  - Opportunity : Description
  - Opportunity : Stage
  - Opportunity : Status
  - Opportunity : Close By (date)
  - Opportunity : Certainty%
  - Opportunity : Forecast (summed)
- Further specifications include:
  - Search criteria of Opportunity : Assigned To, Opportunity : Stage, Opportunity : Status, Opportunity : Close By, and Opportunity : Forecast.
  - Grouping by the Sales Rep (Opportunity Assigned To) in order to get the Forecast totals by Rep. Sorting by Opportunity Assigned To and the Forecast amount.
  - Right justify numerical columns.
- To add the chart:
  - Select the **Edit** button next to the report you want to add the chart to. The Report Options, Step 1 of 2 page is displayed.
  - Select the **Continue** button. The Search Criteria for Report page is displayed.
  - Click on the **Continue** button. The Report Options, Step 2 of 2 page is displayed.
  - Scroll to the Chart Options panel of the page.
  - Complete the details in the Chart Options panel and select the **Save** button. Refer to Report Fields and Buttons for information on the Chart Options fields.
  - To view the chart, run the report.

17.7Creating a Cross Tabular Report

Example: Opportunity Stage by Sales Rep

- This example demonstrates how to create a cross tabular report, which shows Opportunity Stage by Sales Rep
- (Opportunity Assigned To).
- The report should show the sales reps from left to right across the top of the report, and the stages down the left-hand side of the report.
- To create the report:
    - Select the **Reports** button.
    - Select **Sales** from the context area of the screen.
    - Click on the **New** action button. The Report Options, Step 1 of 2 page is displayed.
    - Select the Source View, and then **Cross Tab** from the Report Type field.
    - Complete the details on the rest of the page. The fields are described in the List Report example on the previous page.
    - There is a field called Cross Tab, which is only displayed when building a cross tabular report. This defines the columns displayed horizontally (from left to right) on the table. The Report Contents defines the information displayed vertically in the table.
    - Select the **Continue** button and complete the information in the Report Options,
    - Select the **Save** button. The new report is displayed in the list of reports.
    - To run the report, select the **Run** button. The output is displayed in a new browser window.

17.8 Creating a Historical Report

To create a report which shows, for example, opportunities opened during July 2005, which were subsequently closed within the same quarter (July - September 2005), you can create a Historical report.

To set up and run this report:

- Select the **Reports** button.
- Select the category to which you want to add your new report. For example, Sales. A list of Sales reports is displayed.
- Select the **New** action button. The Report Options, Step 1 of 2 is displayed.
- Give the report a name, for example, Opportunity Opened and Closed.
- Select the Report Source as **Opportunity Summary**.
- Set the Report Type to **Historical**. The panels below the Report Details are changed to reflect this type of report.
- User Requirement: Info Manager Administration Rights
- User Requirement: Info Manager Administration Rights
- The **In Range** field should reflect the type of start date you are measuring, in this case, Opportunity: Opened.
- You can also use the Opportunity: Created Date. The former is set by the system but can be changed by the end user. The latter is set by the system and cannot be changed by the user. The way in which you structured your sales process and workflow determines which date to report on.
- The **Out Of Range** field can be used to form a logical pair with the In Range field. For example, if you select the In
- Range field as Opportunity : Opened, and the Out Of Range field as Opportunity : Closed, when you report over a period of, for example, one quarter, the report will return the number of opportunities still open at the end of that quarter.

- 7. For this report, we are more interested in what has closed within the specified time frame, so you can leave the Out Of Range field blank, but add the Opportunity : Closed to the Search Criteria of the report. You can also add the Opportunity : Status to Search Criteria.
- The Date Partition field divides the report results into sections within the In Range date specified. Since our In
- Range date will cover a month time period, it would be useful to divide the results by week. You can do this by setting the Date Partition field to **Week**.
- Select the **Continue** button. The Search Criteria for Report page is displayed.
- The In Range date is automatically displayed as the first search criteria. Specify the date range for **Opportunity Opened**, such as between 01 July 2005 and 31 July 2005.
- Specify the **Opportunity Closed** date range, such as between 01 July 2005 and 30 September 2005.
- Add the **Opportunity Status** search criteria, for example, Won.
- Click on the **Continue** button. The Report Options, Step 2 of 2 page is displayed.
- Complete the Header and Footer settings and Chart Options. A line chart will be displayed by default.
- Select the **Save** button. The report is displayed in the list of reports.
- Click on the hyperlink of the report or select the Run button to run the report. The report Display Options page is displayed.
- Select the appropriate display options. You can also re-set the report search criteria if you wish.
- Select the **Run** button. The report output is displayed in a new browser window. The report output shows the number of opportunities that were opened in July, which were closed and won within the Q3 (Jul - Sep) period.
- The total number of opportunities opened from the 1st of July to the 31st of July, which were subsequently won, is the number shown on the last week of the selected time period (not the total of all the weeks). The weekly totals give you a point-in-time snapshot for the whole "opened" period being measured.

17.9 Adding a New Report Style

- **Note**: There is no access to the Reports subdirectory in SageCRM.com.
- To create a new report style:
    - Go to the Reports subdirectory of your CRM installation.
    - In this directory there are a number of *.xsl (Extensible Style-sheet Language) files, which define the existing two styles for the desktop and WindowsCE browsers. The files should have the same name, ending with PC or CE for desktop and WindowsCE browsers respectively. There are also CSS files which are referenced by the PC *.xsl files.
    - User Requirement: Info Manager Administration Rights
    - Copy, for example, the StdGridsPC.xsl and the StdGrids.css files and rename them with a new style name.
    - Edit the *.xsl file and *.css file. The *.xsl file controls the structure of the report and the *.css file controls the look and feel of the report. Make sure you change the LINK tag in the new xsl file to point to the new css file.
    - **Save** the changes you have made. To create a translation for the new styles so that they appear in the Report
    - Style field:
        - In CRM, select the **Administration** button.
        - Select **Translations** from the context area of the screen. The Find page is displayed.
        - Select the **New** button. The Translation input page is displayed.
        - Enter the Caption Code, which must be the same as the file names (without the PC or CE).
        - Enter the Caption Family as **ReportStyles**.
        - Enter the Caption Family Type as **Choices**.
        - Add the translations for the languages used in your organization.
        - Select the **Save** button.
        - Test the new style by creating a new report. The new style appears in the Report Style field and your report output should reflect the style changes.

17.10 Deleting a Report

To delete a report:

- Select the **Edit** button next to the report you want to change. The Report Options, is displayed.
- Select the **Delete** button. The Delete Report page is displayed.
- Select the **Confirm Delete** button. The report is deleted and no longer appears in the report list.

Preferences
FAQs
Show me how to:

- Open the Preferences work area.
- Know which preferences I can change.
- Change Preferences.
- Use the User Preferences wizard.

17.11 Accessing Preferences

- User Preferences give you more control over the way information is displayed. You can tailor the display of information
- to better suit the way you work. For example, if you work in the customer service team, your main interest is probably
- the status of existing cases. Using the Log Me In To option, you can set Preferences to show the cases you are working
- on as the first page you see when you log on.
- To access Preferences:
    - Select the **My CRM** button.
    - Click on the **Preferences** tab.
    - Select the **Change** button.
    - Enter the details in the **Preferences** page.
    - Select the **Save** button. The Preferences page is displayed. Log off and back on again to see the changes take affect.
- Note: The Install CRM Outlook Integration, and Change Password action buttons are available on the Preferences page. Please refer to Downloading the MS Outlook Plugin, and Changing Your Password for more details.

17.12 Preference Fields

The table below describes the standard fields.

Field	Description
Log Me In To	Determines the default first page when you log on. For example, Dashboard, Calendar, Case List, Opportunity List, Quick Start Screen.
Empty Recent List For Each Session	The Recent List "remembers" the most recent pages you have visited in CRM. Selecting Yes empties the Recent List each time you log off and back on again.

Field	Description
Recent List Activation By	Options available are Click and Hover, as the Recent List can be viewed by clicking on or hovering over the Recent button. Please refer to Appointments and Tasks for more information.
Pop Out List Activation By	Select from Hover or Click. You can hover or right-click on the menu buttons to activate the Pop Out lists.
My Default Find Screen	Determines the Find screen that appears at the beginning of a session. Note that the system "remembers" your last Find, until you change it. This means you can set your default Find screen to be Company. However, as soon as you search by Person, the next time you press Find, the person Find page is displayed.
Show Solutions In My CRM	Makes the Solutions tab available in the My CRM work area.
Show Outbound Calls In My CRM	Makes the Outbound Calls tab available in the My CRM work area.
Currency	Currency in which monetary fields are displayed to the user. Implementation dependent.
Show Leads Pipeline	Displays the graphical pipeline of leads in the Leads tab within My CRM and Team CRM.
Show Opportunities Pipeline	Displays the graphical pipeline of opportunities in the Opportunities tab within My CRM and Team CRM.
Show Cases Pipeline	Displays the graphical pipeline of cases in the Cases tab within My CRM and Team CRM.
Grid Size	Determines the default maximum length of lists and grids on a page.
E-mail Screen Position	The way in which the New E-mail screen is displayed. Select from Normal, Popup, or Split. Note, the Normal and Split options are ignored if you are working with CRM in Outlook. In other words, a new e-mail will always be displayed in a popup window.
Line Item Screen Position	The way in which the Line Item screen is displayed. Select from Normal, Popup, or Split.
Default E-mail Address	The default From e-mail address used in the New E-mail screen. You can change your default From address if you have been given permission to send e-mails from other accounts.
Report Print Preview Default Page size	The default orientation (Portrait or Landscape) used on the Report Display Options page for producing a report in PDF format.
Report Print Preview Default Orientation	The default page size used on the Report Display Options page for producing a report in PDF format.
Default E-mail Template	The user can set a default e-mail template. When creating a new e-mail the default e-mail template is selected automatically and all its values are copied to the new e-mail screen.

Field	Description
On-screen Coaching	Determines how on-screen coaching is displayed. **On**. Turns coaching on for all screens for which coaching is available. **Off**. Turns all coaching off. **Minimized**. Users must click on the Maximize On-screen Coaching button at the top of an individual screen to view on-screen coaching for that screen. **Customized**. Allows users to minimize on-screen coaching on some screens while leaving it maximized on others.
Single-Column Diary	Set to Yes, the diary is in single column format, with vertical spacing adjusting to the content of the time slot. Set to No, the daily view can be displayed in an Outlook-style view, where there is equal spacing between vertical time slots and multiple appointments at the same time are placed next to each other in columns.
Number of Diary Columns	The maximum number of columns when the Single-Column Diary setting is set to No. When this number is exceeded, the diary style reverts to a single column format.
Full Menu in Outlook	Displays or hides the menu buttons in CRM in Outlook. Defaults to No to maximize viewing space for CRM in Outlook. Please refer to Using CRM from within Outlook for more information.
Calendar View	Determines the default calendar view. For example, Day, Month, Week, Year.
Diary Start Time	Determines the start time of the calendar view on communications. Changing this settting also adjusts the shaded area in the meeting planner.
Diary End Time	Determines the end time of the calendar view on communications. Changing this settting also adjusts the shaded area in the meeting planner.
My Week Starts On	Determines the first day of the weekly calendar view.
Date Format	Date format preference. For example, select mm/dd/yyyy to see the date in Month/Day/Year format.
Use AM/PM	Select Yes to use AM/PM time format or select No to use 24hr format.
Time Zone	Each individual user's time zone needs to be set. This is especially important if you intend on synchronizing with Microsoft Outlook. There are 75 time zones to select from. The one you select defines what daylight settings are used, so you must be careful in selecting the correct zone. The zone you select also needs to correspond exactly to your computer setting. All times are relative to the logged on user. For example, a meeting made at 09:00 GMT by one user appears at 10:00 to users in +1:00 GMT. The time zone of the server is set by the System Administrator.

Field	Description
Decimal Point	The preferred way to view decimal point. For example, period [.] or comma [,].
Decimal Places	The preferred number of decimal places to be displayed. For example, 2.
Thousand Separator	The preferred way to view the thousand separator. For example, period [.] or comma [,].
Default Targets For High Priority Reminder Messages	The way in which the reminder is sent out for a high priority Communication, if the Send Reminder Message check box was selected. Please refer to Appointments and Tasks for information on the Send Reminder Message check box.
Default Targets For Normal Priority Reminder Messages	The way in which the reminder is sent out for a normal priority Communication, if the Send Reminder Message check box has been checked. Please refer to Appointments and Tasks for information on the Send Reminder Message check box.
Default Targets For Low Priority Reminder Messages	The way in which the reminder is sent out for a low priority Communication, if the Send Reminder Message check box was checked. Please refer to Appointments and Tasks for information on the Send Reminder Message check box.

17.13 Changing Preferences

- To change Preferences:
  - Select the **Preferences** tab. The Preferences page is displayed.
  - Select the **Change** button.
  - Enter the new details on the **Preferences** page.
  - Select the **Save** button. The Preferences page is displayed. You can use the Set To Defaults button to return Preferences to the default settings.
- **Note:** You can use the Set To System Defaults button to return preferences to the default settings.

17.14 Using the User Preferences Wizard

- The user preferences wizard allows you to set up some core user preferences in simple, user friendly steps. Using the wizard, you can set certain display options, pipeline options, e-mail options, number options, and time options. You can set preferences for all of the settings offered on the user preferences wizard in one sitting, or you can just click on any wizard tab to set preferences for those settings that are relevant to you.
- To use the user preferences wizard:
  - Select the **Quick Start** tab.
  - Select the **User Preferences Wizard** link. The Introduction tab of the wizard is displayed.
  - Click on **Continue**. The Step 1: Display Options tab is displayed.
  - You can set which page is displayed each time you log into CRM. You can also set your calendar view (to either day, week, month, or year).

- Select **Save & Continue** to move to the next step. The Step 2: Pipeline Options tab is displayed.
- Select **Yes** from the relevant drop-down lists to set the pipeline to display for Leads, Opportunities, and Cases.
- Select **Save & Continue**. The Step 3: E-mail Options tab is displayed.
- Select the E-mail screen position - Split, Normal, or Popup. You can also select a default e-mail template.
- Select **Save & Continue** to move to the next step. The Step 4: Number Options tab is displayed.
- Select the currency you want to work with. You can also set decimal and thousand seperators.
- Select **Save & Continue**. The Step 5: Time Options tab is displayed.
- You can set your preferred date format, what day your week starts on, and your timezone.
- Select **Save & Continue**. The Last Page tab is displayed.
- Click on the **Return** button to return to the Quick Start tab.

18 Glossary of Terms

Action button
Action buttons are usually found on the right-hand side of the screen. They help you add and change information and perform different tasks within the system. The action buttons available to you change depending on where you are. Examples of Action buttons are: Change, Delete, Confirm Delete, New Task, New Appointment.

Advanced Find
Allows users to create enhanced search queries based on complex SQL statements using WHERE, AND, and OR clauses.

Apply Filter button
The apply filter button allows you to restrict lists of information by a predefined set of criteria. For example, the My CRM | Calendar list defaults to filter out all pending communications for the current user. The user can narrow the list further by filtering all pending meetings.

Campaign
A campaign is a planned rollout of marketing activities in phases, or Waves. Each phase can in turn be made up of several actions or Wave Activities. Each action can in turn be made up of individual communications between your company and its target audience.
For example, a campaign called West Coast Lead Generation aims to generate leads in a specific geography.

Case
A case is a customer service issue. These issues can range from a technical problem to a customer complaint. A case keeps track of the issue from the initial logging through to resolution. Multiple communications (or tasks) can be linked to one case.

Communication
Communication refers to a task or meeting. The specific types of communication are determined as action types.
For example, Letter In, Letter Out, Phone In, Phone Out, Demo.

Company Team
A Company Team is a group of users linked to a company for the purpose of tracking account management responsibilities.

Context Area
The context area displays a summary of the information you are currently focused on. Example: If you are working in the context of a person, their name appears on the top of your screen. Within the same context area you can see their company, phone number, and e-mail address. You can quickly move from the context area of a person to the company they work for by clicking on the Company link within the context area.

Dashboard
The Dashboard is a customizable page that contains information most relevant to your daily work. For example, a list of the companies you most often work with.

Documents Tab
The Documents tab is available within the context of a person, company, opportunity, case, or solution. It stores a link to a document.

Document Drop
The Document Drop feature provides a short cut for linking documents, e-mails and other types of files from another application to customer data in *CRM*.

Find page
The Find page is displayed when the user selects the Find menu button. There is a Find page for companies, people, opportunities, leads, solutions, cases, and communications.

Forward and Back buttons

The Forward and Back buttons take you one step back or one step forward from your current position in the system. While using the system, they are intended as a replacement for the Forward and Back buttons within your Web browser window.

Groups

Groups allow users to create collections of records within CRM. Groups can be static or dynamic.

Hypertext Link

Hypertext links allow you to jump from one page to another. Examples of hypertext links are: when you click on a company name, the Summary page associated with that company is displayed in the work-area; or you can click on an e-mail address to send an e-mail straight away.

Lead

A lead represents unqualified information received from your corporate Web site, trade shows, and purchased mailing lists.

Line Item

Line items are products that your customer is interested in buying. They are linked to the opportunity and selected through the Quotes or Orders tab.

Menu button

Menu buttons are found on the left-hand side of the screen. They help you navigate to commonly used pages.

Menu buttons remain the same regardless of the company or individual or any other context you are working in.

However, one user may see a different set of menu buttons to another, since access to these is set up in the user profile. Examples of Menu buttons are: New, Find, Team CRM.

My CRM

The My CRM button shows a series of tabs all containing information related to the logged in user. Depending on the user's rights, the My CRM areas of others can also be viewed by selecting another person from the context area of the screen.

Next and Previous arrows

The Next and Previous arrows appear when a list of information extends to more than one page. Clicking on the left- or right-pointing arrows will display the previous or next page respectively. The outer arrows take you to the first or last page within a set of pages.

Notification

The notification feature is implementation dependent. When the notification feature is switched on, notifications act as reminders for upcoming or overdue tasks. They are set in the Communications Details page and appear either on-screen in red text, or as e-mail or SMS messages. They can also be integrated into the workflow functionality.

Opportunity

An opportunity refers to a sales opportunity. Opportunities track sales interest from the initial qualified lead through to closing the deal.

Outbound Call List

Outbound Call Lists are used for high volume telemarketing activities, where calls are not preallocated to individual users, and a Communication record is only created when a successful contact is made.

Panel

A panel groups related information for easier viewing. One page of information can be divided into a number of panels.

Pop Out list

You can hover or right-click on the menu buttons to activate Pop Out lists. These allow you to quickly navigate through CRM.

Progress button

The progress button is available in the context of leads, opportunities, solutions, and cases when the workflow functionality is not in use.

It can be accessed from the lead, opportunity, solution, or case summary page.
It allows users to change the Stage, Status and other data relating to the lead, opportunity, solution, or case. It also allows users to add a tracking note, which forms part of the history of the lead, opportunity, solution, or case "life cycle".

Quick Look

The Quick Look tab shows you the most recent communications, opportunities and cases associated with a company or person.

Recent list

The Recent list is located in the top left-hand corner of your screen. Clicking the recent list or hovering over it, allows you to select and return to the companies, people, opportunities, leads, solutions, or cases you were most recently dealing with.

Shared Documents

The My CRM | Shared Documents tab lists all the Shared Documents and Templates you have access to.

SLA

SLA stands for Service Level Agreement. A Service Level Agreement is made between your organization and a customer to set standards for customer service case resolution times. Service level agreements can be linked to companies and to individual customer service cases.

SMS

SMS stands for Short Messaging Service. If this feature is activated for your system, SMS is used to notify users via their mobile phone or other wireless device of events taking place. For example, you can receive a reminder of an upcoming meeting via SMS messaging. It can also be used in conjunction with workflow to notify users of new leads, overdue cases, or closed opportunities.

Solution

Solutions are the "cleaned and approved" basis of a knowledge base. Solutions can be accessed by internal CRM users, as well as customers and partners via a self service Web site. Solutions are a separate entity from Cases, but they can be linked to multiple cases—and a case can be linked to multiple solutions.

Sort

You can change the sort order of any list by clicking on the underlined column heading.

Tab

Tabs are like folder dividers. The information found in each folder section is determined by the current context.
For example, if the person "Anita Chapman" has been zoomed in on in the context area, selecting the Quick Look tab will display the most recent interactions your company has had specifically with Ms Chapman.

Team

A team is a group of users who perform similar roles. Tasks (communications), opportunities, leads, and cases can all be assigned to a team. A user can be a member of one team. This is called their Primary Team. A user can also have rights to view information in multiple teams.

Tracking note

Tracking notes are used in the context of leads, opportunities, cases, and solutions to make free text notes on the progress of the lead, opportunity, solution, or case.

Validation error

A validation error message appears on the screen when an incomplete or incorrect new entry has been made in the system. The user must fill in required fields that are empty, or correct an invalid entry, such as numbers in a text-only field. These fields are highlighted with a question mark and cross mark, respectively.

Wave

A Wave is a phase of a marketing campaign. Each wave can be made up of several actions or Wave Activities.

Each action can in turn be made up of individual communications between your company and its target audience.
For example, a campaign called West Coast Lead Generation aims to generate leads in a specific geography. The campaign consists of three different Waves: 1) Raise Awareness; 2) Product Launch at Tradeshow; 3) Qualify Interest.

Wave Activity

A Wave Activity is a type of action within a wave of a marketing campaign. Each wave activity can be made up of individual communications between your company and its target audience.
For example, a campaign called West Coast Lead Generation aims to generate leads in a specific geography. The campaign consists of three different Waves: 1) Raise Awareness; 2) Product Launch at Tradeshow; 3) Qualify Interest. The first wave is made up of two different wave activities: "Flyer Mailing" and "Newsletter Mailing". The second wave is made up of the following two wave activities: "Invitation with Response Card" and "Response Card Follow-up", and so on.

Wild Card

The % wild card helps you complete unspecific searches. The % (percentage) symbol, means "contains". For example, typing "%software" in the Company Name field of the company Find page returns a list of all companies, which contain the word "software" in their company name.

Workflow

Workflow automates your company's business processes using a predefined set of rules and actions.