Customer Relationship Management

Training Manual

ETMCM11

Document Number CMTRN

May 2018, Release 11

This document has been prepared to conform to the current release version of TRAVERSE Accounting Business Software for Windows. Because of our extensive development efforts and our desire to further improve and enhance the product, inconsistencies may exist between the software and the documentation in some instances. Call your customer support representative if you encounter an inconsistency.

Contents

1

INTRODUCTION

OVERVIEW

Obviously, business is simply about making money. But to do that, you need to manage your customer relationships—you must keep existing clients informed about your company's news, attract new business by running promotions, get the word out about your company through advertising campaigns and bulk communications, and follow up on leads to gain new business. That's the hard part. The Customer Relationship Management (CRM) application helps you track communications with people or businesses using data already present within TRAVERSE.

Contacts form the basis of the CRM application: you create a contact record for each company you do business with, then enter names for the individuals you work with at that company. For faster setup, you can build contacts from Vendor, Customer, and Employee data already stored in the TRAVERSE Accounts Payable, Accounts Receivable, and Payroll applications.

System Information

Additional information about using the system is found in the following sources:

- the *Customer Relationship Management Help*
- the training manuals for other TRAVERSE applications
- the *Developer's Guide* and *Developer's Object Descriptions* manuals
- online help

Customer Support

Open Systems Holdings Corp. has a strong commitment to customer service and product quality. If you need help using any Open Systems product, follow these procedures:

- Consult the user's guide and other TRAVERSE reference materials.
- If you are a subscriber to the TRAVERSE customer support program, you can consult your customer support representative (1-800-320-3088) or e-mail them at traverse_support@osas.com.

ABOUT CUSTOMER RELATIONSHIP MANAGEMENT

The **Customer Relationship Management Training Manual** is divided into these sections:

Introduction

The Introduction provides an overview of the Customer Relationship Management (CRM) application and the TRAVERSE system.

Setup

The setup chapter covers the requirements for setting up the CRM application.

Using CRM

This chapter covers the procedures and processes you use to create Activities, assign Tasks, or design Campaigns to enhance your customer relationships and use the CRM application the most efficiently and effectively.

Setup and Maintenance

This chapter explains how to set up CRM, such as setting Business Rules; entering the Contact Methods, Types, and Statuses the system uses; and designing Bulk Communications.

Contacts

This chapter describes how you set up your Contacts, view information about your Contacts through an interactive view and a dashboard, printing labels and lists and synchronizing your contacts with their linked records in other applications in TRAVERSE.

Opportunities

This chapter describes how you set up your Opportunities and work with reports to see your Opportunity Projections, Worksheets and a general report on how the Opportunity is progressing.

Tasks and Activities

This chapter describes how to set up Tasks and assign them to employees and print reports showing Tasks. How to set up Activities to report what has been done for your Contacts and show if tasks assigned to employees have been completed with notes on what was done with the Contact, print reports showing details on Activities.

Campaigns

This chapter describes how to set up Campaigns and show the profitability of those Campaigns and print a detailed report for the Campaigns. How to set up Contact Groups to help the Bulk Communications find information from Contact setup. How to define Communications to be used with the Bulk Communications to send out information to your Contacts.

2

SETUP

ABOUT CRM

Obviously, business is simply about making money. But to do that, you need to manage your contact relationships—you must keep existing clients informed about your company's news, attract new business by running promotions, get the word out about your company through advertising Campaigns and Bulk Communications, and follow up on leads to gain new business. That's the hard part. The Customer Relationship Management (CRM) application for TRAVERSE helps you track communications with people or businesses using data already present within TRAVERSE.

Contacts form the basis of the CRM application: you create a Contact record for each company you do business with, then enter names for the individuals you work with at that company. For faster setup, you can build contacts from Vendor, Customer, and Employee data already stored in the TRAVERSE Accounts Payable, Accounts Receivable, and Payroll applications.

After you set up Contacts, use the Activities, Tasks, and Bulk Communication tools in CRM to track your communications with Contacts.

- Activities record all actions related to a specific Contact, letting you see at a glance who has been contacted, when, and for what reason. Activities are both manual and automatic: you can add Activities to Contacts, or the system can automatically add Activities to Contacts in response to your actions. Activities record only what has been done, not what is needed.
- Tasks, while similar to Activities, are centered around CRM users. You can create Tasks, assign them to employees for completion, and specify Due Dates. Tasks help you track what *you* need to do for a contact.
- Bulk Communications record the faxes, emails, and regular mailings you send to Contacts. Each time you send a Bulk Communication, the system automatically enters an Activity for each Contact who received it.
- Use the Opportunities and Campaigns tools included in CRM to track your communications' success. Opportunities record the leads and business prospects you gain with Contacts as a result of communications and help you track these prospects from follow up to closure.
- Campaigns help you manage your communications and analyze the costs and profits resulting from a communication.

As with all TRAVERSE applications, CRM includes reports and inquiry tools that help you stay on top of your Contact communications. Use the reports to list Activities for a Contact, view the status of assigned Tasks, and analyze Campaign profitability. Use the Interactive Views functions to view much the same data in a more targeted, interactive format that you can drill down through to more detail.

SETTING UP CRM

Use the functions on the **Setup and Maintenance** menu to set up CRM. Although organized in order of use on the menu, use the functions in this order to set up the application:

1. Use the **System Manager, Business Rules** function first to specify if you want to interface CRM with Project Costing and to select the options that control how the system works.
2. Next, use the **Activity Types**, **Task/Response Types**, **Campaign Types**, and **Opportunity Codes** functions to enter descriptions for the Activities, Tasks, Campaigns, and Opportunities you manage in CRM. Later, when you create an Activity, Task, Campaign, or Opportunity, you can select from the descriptions you enter here.
3. Use the **Contact Status** function to enter Descriptions for Contact Statuses used by the system. Later, when you set up Contacts, you can select from these Descriptions to organize Contacts into groups.
4. Use the **Contact Methods** functions to set up custom fields to capture additional Contact information.
5. Use the **Contact Access** function to grant access to contact information by Sales Reps and Customers in conjunction with the System Manager, Administration, User Mapping function.
6. Use the **Contacts** function to enter information about the Contacts you want to manage with CRM. You can automatically set up Contacts from your TRAVERSE Vendor, Customer, and Employee data.
7. Use the **Campaigns** function to enter information about the Campaigns your company plans to run.
8. Use the **Define Communication**s function to design bulk fax, email, and mail communications to send to your contacts.

After you've set up this basic CRM information, use the functions on the corresponding menu to print lists of the information you entered to check it for accuracy.

Selecting Business Rules

Use the **Business Rules** function (page 4-5) to interface CRM with Project Costing (all other applications are automatically interfaced) and select the options that control how the system works.

Interfacing applications allows you to get the most from your TRAVERSE system. When CRM is interfaced with other TRAVERSE applications, you can transfer information between the applications to reduce data entry time and errors. For example: with the interface to applications, you can use the Vendor, Customer, and Employee information within Accounts Payable, Accounts Receivable, and Payroll to quickly set up contacts within CRM, reducing setup and data entry time. When you make a change to Contact information in CRM, you can then copy those changes back to the original record as needed.

After you interface CRM with other TRAVERSE applications, select the options you want to use to control how CRM works. Your selections here control how CRM acts for certain functions, auditing changes made to Contacts, how images are stored and whether it prompts you to copy Contact changes to interfaced applications when you switch between Contact records or exit the Contacts screen.

Entering Type Descriptions

Once you've selected options and interfaced CRM with other applications, enter the descriptions used throughout the system. These descriptions allow CRM to be as flexible as possible and helps you organize Activities, Tasks, and Campaigns as it makes sense for your business.

Activity Types

Use the **Activity Types** function (page 4-13) to enter type descriptions to organize activities. Because Activities record all actions related to specific Contacts, examples of Activity Types might include Initial Call, Follow Up, Quote, or Request. Keep in mind that some Activity Types are reserved for use by the system, such as the created, deleted, and updated Activity Types. You can choose to display or hide these System Activity Types as needed.

Task Types

Use the **Task Types** function (page 4-17) to enter type descriptions for Tasks. Tasks record those things that you (or your employees) need to do to further communication with a client, some examples of task types might include Follow Up, Resolve Issue, Get More Information, and Send Materials. Because Activities and Tasks are similar, there may be some overlap between their Type Descriptions.

Campaign Types

Use the **Campaign Types** function (page 4-21) to enter descriptions of the Campaign Types your company uses. Examples of campaign types might include Newspaper Ad, Postcard, Web Special, and Regional Coupon. When you set up a Campaign, you can include (or exclude) certain types from that Campaign.

Opportunity Codes

Use the **Opportunity Codes** function (page 4-33) to enter descriptions about Opportunities. You can set up three types of Opportunity Codes: Status Codes (such as New, Pending, Closed, On Hold), Probability Codes (such as Poor, Fair, Good, Excellent, or 23%, 50%, 75%), and Resolution Codes (such as Good Sale, Lost to Competition, Project Complete).

Entering Contact Status Descriptions

Contact Statuses allow you to organize your contacts into groups that make sense for your business and filter Bulk Communications, Contact Labels, and Contact Inquiries. Examples of Contact Statuses might include Active, Inactive, and Out of Business. Or you could group contacts by the industries they represent: Retail, Service, Not for Profit, Consulting. Use the **Contact Status** function (page 4-9) to enter descriptions for the statuses you use, then assign them to Contacts in the **Contacts** function (page 4-47).

Setting Up Contact Methods

CRM allows you to set up as many Contact Methods, which equates to custom fields, as you need to capture additional information about your Contacts. Use the **Contact Methods** function to set up these fields.

Before you set up Contact Methods, take some time to plan them out. Ask yourself what type of information you want to capture and for what entities. For example: do you want to record additional phone numbers just for the business itself or for all of the individuals you deal with at that business? Determine the format of this information: is it Numeric or simple Text? Is it a Date, Time, Phone Number, or Quantity? How should it be aligned on reports? Some time spent planning now can save time and hassle later.

Setting Up Contacts

Contacts form the basis of the CRM application: you record Activity against a Contact record, assign Tasks to be completed concerning a Contact, push Bulk Communications to Contacts, and follow up on Opportunities related to a Contact’s response. Use the **Contacts** function (page 4-47) to set up Contact records. If you link CRM with Customers, Vendors and Employees, you can copy existing information from your Customer, Vendor, and Employee records to shorten this setup time.

Keep in mind that Contact records generally represent a single business instead of an individual. Individuals will be set up as Contact records and assigned as members of the Contact record for the company.

Setting Up Campaigns

Use the **Campaigns** function (page 4-25) to enter details about your company's Campaigns. When you set up a Campaign, you can enter the dates it is valid, the Campaign Types to include in the Campaign, and (if CRM interfaces with Project Costing) the Project, Phase, and Task to use for its costs.

Defining Communications

Use the **Define Communications** function (page 4-61) to create the mass fax, email, and direct mail communications you send to Contacts. You can enter the text of the message directly into the Bulk Communications screen or you can link the record to an external file (such as a Word® document, Excel spreadsheet®, or .PDF file). If you attach a file to the Bulk Communication record, the system automatically uses that file when you generate the Communication.

3

USING CRM

OVERVIEW

After you've set up the information that forms the basis of the CRM system, you can incorporate it into your daily workflow. Because the aim of the CRM application is to help you manage your relationship with Contacts, you'll need to use it's tools on a regular basis to record contact Activities and Tasks, review Task and Campaign Status and effectiveness, and look up Contact information.

The processes you use to manage this information can be divided into three categories:

- Opportunities
- Tasks and Activities
- Campaigns

This chapter briefly describes these processes and how they work within the system, then describes how to attach documents and Tasks to various records throughout CRM.

USING CRM FUNCTIONS

The functions on the **Opportunities, Tasks and Activities**, and **Campaigns** menus help you record the activities or tasks you perform on a daily (or frequent) basis that are related to contact records. While the information you enter in the Setup and Maintenance and Contact functions forms the basis of the CRM system, the information you enter in these menus' functions illustrates its purpose: to help you manage your business relationships.

Opportunities

Opportunities record the business prospects you have with Contacts and represent the possibility of doing more business with them. Taken as a whole, opportunities provide you with a complete business history with a Contact. Use the **Opportunities** functions to enter Contact Opportunities and print reports to evaluate the status of these Opportunities.

Activities and Tasks

Tasks record the things you or your employees need to do, and may be only tangentially related to a Contact. For example: you can record a Task stating the need to create the copy for an advertisement associated with a Campaign that will eventually be sent to contacts. Because Tasks record the things that need to be completed, you can assign them to others and set their Due Date. Use the **Tasks** function to view Tasks by Status or by User Type, and to enter new Tasks.

Activities record all actions taken on behalf of a Contact, in order to record a history of your relationship with that Contact. Some Activities are recorded by CRM automatically. For example: when you create or update a Contact record, CRM automatically enters an Activity for the Contact to record that action. Use the **Activities** function to manually enter actions you want to associate with a Contact's record.

Contact Labels

Use the **Contact Labels** function to print standard or mailing labels for campaign materials. When you print labels, CRM automatically records that activity for the contacts included in the print run.

Bulk Communications

Use the **Bulk Communications** function to generate the actual email, fax, or mail merge messages you send to Contacts. When you generate a Bulk Communication, CRM automatically records that Activity for the Contacts included.

PERIODIC PROCESSES

Because CRM is designed to grow and change as you do, there are functions that you may need to perform on a periodic basis to keep it running smoothly. Use the functions on the corresponding menu to delete old data, Synchronize Contact and linked record information, import or export data from ASCII text files.

Synchronize Contacts

Because the system works as you do, it's inevitable that the Contact records you create from Vendor, Customer, and Employee records already stored in TRAVERSE will get out of sync with their linked sources. This is especially true when you make changes to source records. Use the **Synchronize Contacts** function to copy any changes from source records to their linked Contact records (and vice versa). In this function, you can specify the direction in which information should be copied and which records should be skipped during the copy process.

Import

Use the **Import** function to import information from an ASCII text file into CRM to create new Contact records. In this function, you first build an Import Layout Definition in System Manager, that tells CRM how and where information is located in the ASCII file so that it is imported correctly, then you import the information and can view the results.

CONTACT ANALYSIS

Because information is the ultimate tool you need to manage your business relationships, CRM contains a number of ways to deliver that vital information in a variety of formats.

Contact View and Dashboard

Use the Contact View and CRM Dashboard functions on the **Contact** menu to view specific Contact, Activity, and Task information in an interactive format. When more information exists that is related to the record you are viewing, the description for that information appears in blue text to indicate that you can drill down to more detail. Double-click the blue text to view the specifics of that related information.

Keep in mind that the information in these functions is view-only; to change any incorrect information, use the appropriate function on the **Contact** or **Setup and Maintenance** menus.

Reports

The reports included with CRM are designed to list all information for a number of Contacts, Tasks, or Campaigns, rather than allowing you to view only one record at a time. While you can filter the data that appears on these reports, the reports are most effective when they include a larger set of information that allows you to analyze multiple aspects of your customer relationships at once.

Use the functions on the **Contacts, Opportunities, Tasks and Activities** and **Campaigns** menus to print the reports you need to analyze your business relationships.

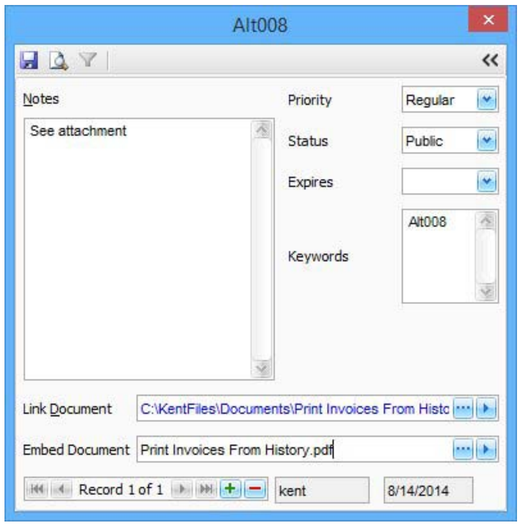
Master Lists

Master lists contain only the basic information you entered to set up the system; they do not contain any Task or Activity information. Print these lists to check this basic information for accuracy. If any information is incorrect, use the corresponding function on the **Setup and Maintenance** menu to change it. Master lists do not have their own menu, the lists are in the menu for the function they list.

ATTACHING AND VIEWING DOCUMENTS

You can attach documents to Contact, Campaign, Activity, Opportunity, and Task records via the **Attachments** button that appears on screens throughout CRM.

Attachments Screen



Click the **Attachments** button to enter comments or attach documents relating to this contact.

1. Select the **Priority** for the comment and attachment; **Regular**, **High**, or **Low**.
2. Select the **Status** for the comment and attachment; **Public** or **Private**.
3. Select the **Expires** date for the comment.
4. The Contact ID will default into the **Keywords** field. Add more key words if desired.
5. Enter the **Notes** for the contact.
6. Attach any **Documents** associated with this contact by clicking on the **Browse** button and selecting the file to attach.

7. You may use the **Embedded Document** to place a document into the attachment. This means the document will be stored within the database and will not require a folder to be shared to view the document. Embed any **Documents** associated with this contact by clicking on the **Browse** button  and selecting the file to embed.

Viewing Documents

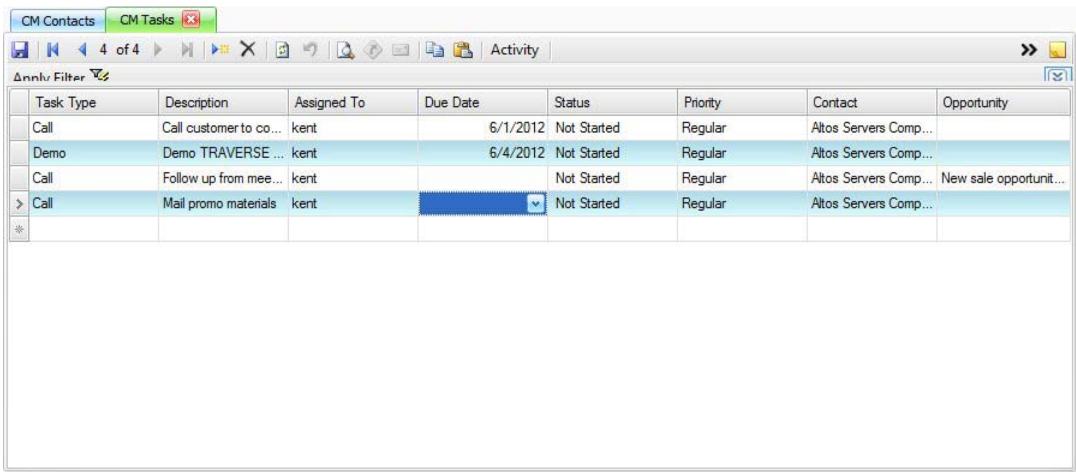
To view an attached document, select the document and click the **View** button . CRM automatically launches the appropriate application to open the document.

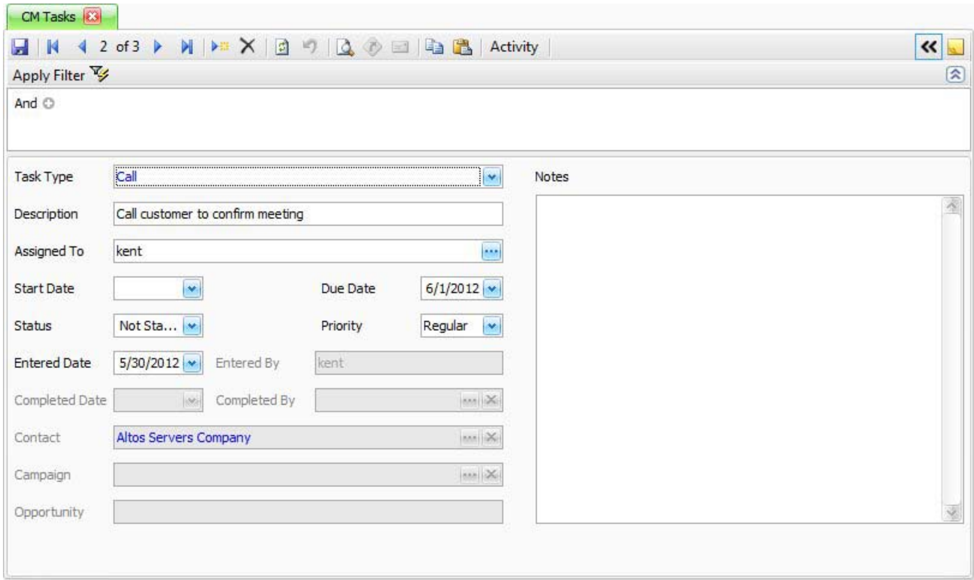
ADDING TASKS

You can attach Tasks to Contact, Campaign, Activity, and Opportunity records via the **Tasks** button that appears on screens throughout CRM.

Adding or Viewing Tasks

To add a Task that is related to the function, click **Tasks** when it appears on a screen. The Tasks screen appears (note that when you add a new record information from which you accessed the Tasks screen appears in corresponding fields on the new task). The Tasks previously entered also appear for the function generating the Task.





Select the **Task Type** and enter a **Description**, then enter the employee Assigned to the Task for completion. You can also select how long the task should appear in task lists, adjust the Due Date, and edit the date the task was entered. Finally, enter any additional instructions or information in the **Notes** window. Close the screen to save your changes and return to the Activity screen.

Attaching Documents to Tasks

Click the **Attachments** button to attach a document to this task. See (page 3-11) for information on attaching documents.

4

SETUP AND MAINTENANCE

OVERVIEW

Use the functions on the **Setup and Maintenance** menu to enter the basic master information the CRM application uses and to set up the system for everyday use.

Functions (and their descriptions in this chapter) are organized by use on the menu—that is, the functions you use frequently are located near the top of the list, while those you rarely use appear closer to the bottom. When you first set up CRM, however, you need to use the functions in this order:

1. Use the **Business Rules** function first to specify the applications you want to interface CRM with and to select the options that control how the system works in general (page 4-5).
2. Next, use the **Activity Types** (page 4-25), **Task Types** (page 4-29), and **Campaign Types** (page 4-33) functions to enter descriptions for the Activities, Tasks, and Campaigns you manage in CRM. Later, when you set up an Activity, Task, or Campaign, you can select from the descriptions you enter here.
3. Use the **Contact Status** function to enter descriptions for Contact Statuses used by the system. Later, when you set up Contacts, you can select from these descriptions to organize contacts into groups (page 4-11).
4. Use the **Opportunity Codes** function to enter descriptions for the Opportunity Codes used by the system. Later, when you work with Opportunities, you can select from the descriptions you enter here to describe Opportunity Status, Probability, and Resolution (page 4-37).
5. Use the **Contact Methods** function to set up the custom fields your company uses to capture additional Contact information (page 4-43).
6. Use the **Contact Access** function to grant access to contact information by Sales Reps and Contacts in conjunction with the System Manager, Administration, User Mapping function (page 4-15).

Once you've set up the system, you may return to these functions only infrequently to maintain or enter new information. After you set up or change information, print the corresponding master list to verify that the information is correct.

BUSINESS RULES

Use the **Business Rules** function to interface CRM with other TRAVERSE applications and to select the options that control how CRM works, such as whether to audit your contact changes, what your default image storage type will be, and whether to prompt to update linked information.

To set **Business Rules**, follow these steps:

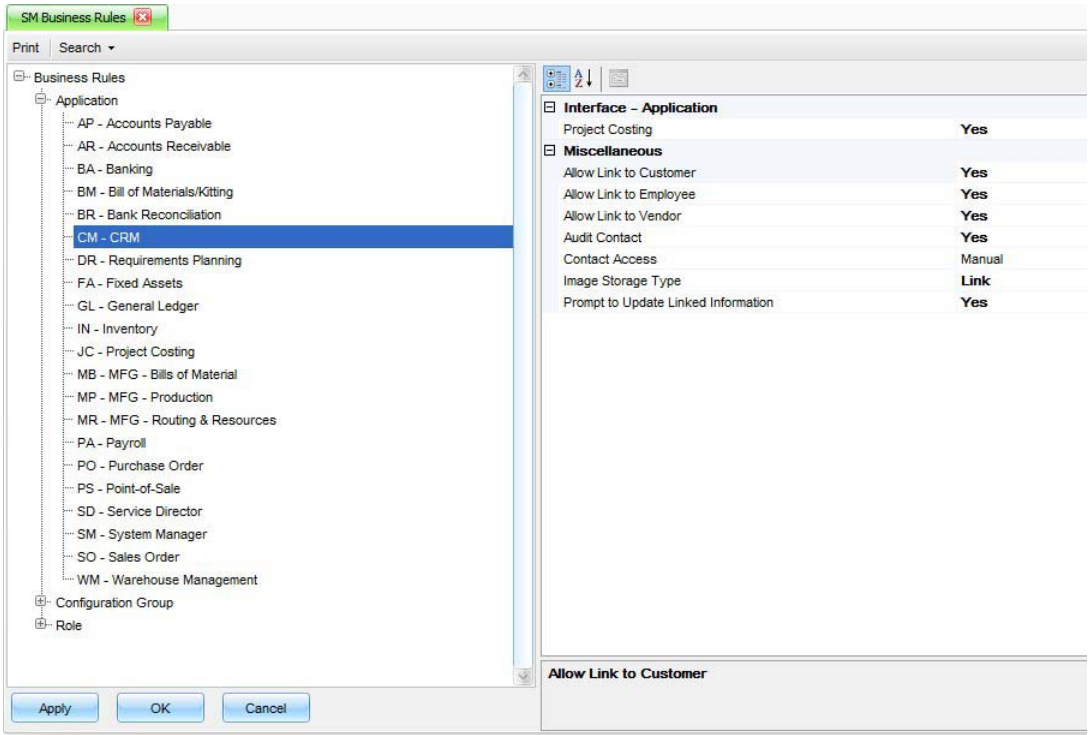
1. Select **Business Rules** from the **System Manager, Company Setup** menu.

Business Rules Menu

2. The **Business Rules** screen appears.

Interfaces - Application

Use the **Interface - Application** section to interface CRM with Project Costing.



3. Select **Yes** to interface CRM with Project Costing.

   - When you interface CRM with Project Costing, you can associate campaigns with Projects and pull cost information from Project Costing to help analyze a campaign's success.
   - In Project Costing, Projects do not need to be associated with a Customer. If you manage internal Projects in Project Costing, you can set up and create Projects in Project Costing without a Customer ID, to track costs and activity for internal projects.

Miscellaneous

Use the **Miscellaneous** section to control how CRM works.

4. Select **Yes** to **Allow Link to Customer** to provide a link between your contact setup and Customer records; otherwise select **No**.

   When the Contact and Customer ID are linked, you can synchronize the information between the records, so if the address is changed in one area you can automatically update the linked Customer record.

5. Select **Yes** to **Allow Link to Employee** to provide a link between your contact setup and employee records; otherwise select **No**.

   When the Contact and Employee ID are linked, you can synchronize the information between the records, so if the address is changed in one area you can automatically update the linked Employee record.

6. Select **Yes** to **Allow Link to Vendor** to provide a link between your contact setup and vendor records; otherwise select **No**.

   When the Contact and Vendor ID are linked you, can synchronize the information between the records, so if the address is changed in one area you can automatically update the linked vendor record.

7. Select **Yes** to **Audit Contact** changes made to the contact setup; otherwise select **No**. This will add records to the Audit Explorer showing contact setup and changes.

8. Select the type of **Contact Access** setup you want to use:

   - **Manual** - will require you to select how you want to view your Contact Access, by Sales Rep or Contact, and then select the Contact or Sales Rep to view the access.

   - **Filter** - will require you to select a Sales Rep, and then you can use a filtering area to filter the Contacts displayed when clicking preview, and saving the displayed Contacts to be accessed by the selected Sales Rep.

9. Select the **Image Storage Type** to use when you are connecting images to your contact records:

   - Select **Link** to store your images in a shared folder on one of your network servers and open the link in the associated software.

   - Select **Database** to store the image in the SQL database and view the image in the image box in the Contact record.

10. Select **Yes** to **Prompt to Update Linked Information** if you want the system to ask whether to update linked Customer, Vendor, or Employee information when you change contact information, and switch to another Contact, or close the Contacts screen without updating the information yourself; otherwise select **No**.

11. Click **Print** to preview and print a report showing your selected business rules.

12. Select a command button:

Command Buttons

Name	Description
Apply	Save the changes you have made to the business rules functions. The screen will remain open.
OK	Save the changes and exit the business rules function.
Cancel	Close the business rules screen without saving any changes.
Print	Preview and print a business rules report.
Search	Perform a wild-card search of all existing business rule descriptions. The results will display in a tree-view for easy navigation.

Business Rules Report

Continental Products Unlimited
Business Rules List
Page 1

Application	Group	Description	Current Value	Default Value
CM - CRM				
	Interface - Application			
		Project Costing	No	No
	Miscellaneous			
		Allow Link to Customer	Yes	No
		Allow Link to Employee	Yes	No
		Allow Link to Vendor	Yes	No
		Audit Contact	Yes	No
		Image Storage Type	Link	Database
		Prompt to Update Linked Information	Yes	No

7/16/2014 2:46 PM *** End of Report *** OPEN_SYSTEMS\KentHe

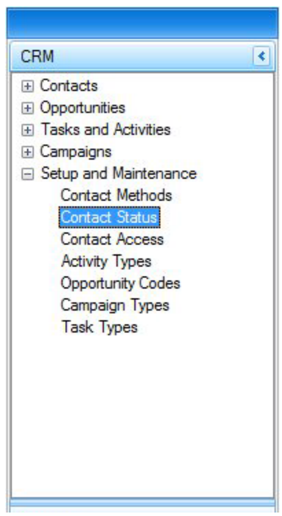
CONTACT STATUS

Use the **Contact Status** function to set up status descriptions for your Contacts. After you assign these statuses to Contacts, you can filter Bulk Communications, Contact Views and Lists, and Contact Labels, to view information only for those Contacts matching the Status you select. Examples of contact statuses include company standings (Active, Inactive, and Out of Business, for example) or industry (Retail, Service, and Consulting, for example).

To set up **Contact Status** descriptions, follow these steps:

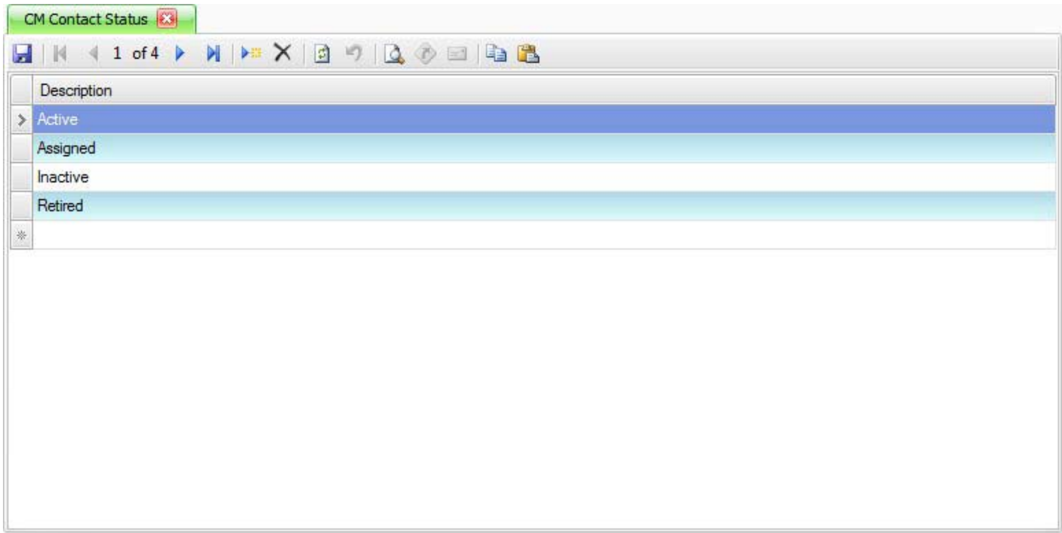
1. Select **Contact Status** from the **Setup and Maintenance** menu.

Contact Status Menu



2. The **Contact Status** screen appears.

Contact Status Screen



3. Enter the contact status **Description** to use within CRM. When you set up Contacts, you assign them one of these statuses.

4. Close the screen to save your changes and return to the menu.

5. To delete a Contact Status Description, select the **Description** to delete and click the **Delete** button on the toolbar. When the confirmation message appears, select **Yes** to delete the description, or **No** to return to the screen without deleting. You cannot delete a Contact Status Description that has been assigned to a Contact.

Producing a Contact Status List

Print the **Contact Status List** to view and verify the contact status descriptions you entered in the Setup and Maintenance **Contact Status** function.

Follow these steps to print the **Contact Status List**:

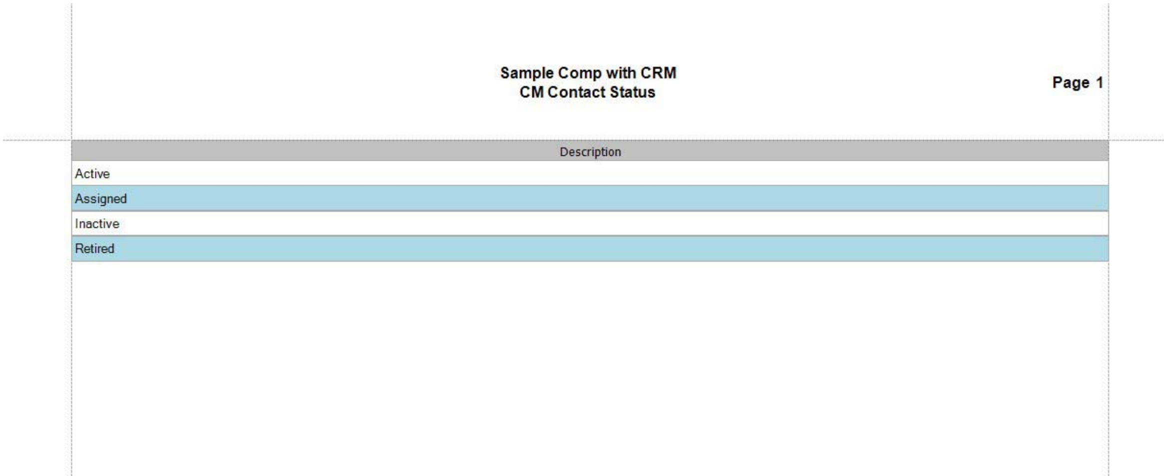
1. Select the **Print Preview** button to preview the list of Contact Statuses. You may also right click in the gray box in the upper left corner of the grid and select **Preview**.

2. The **Preview Report** screen appears.

3. Select the **Print** button in the toolbar to print your list.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Contact Status List


Sample Comp with CRM
CM Contact Status

Page 1

Description
Active
Assigned
Inactive
Retired

CONTACT ACCESS

Use the **Contact Access** function to grant access to Contact information by Sales Reps and Contacts in conjunction with the System Manager, Administration, User Mapping function.

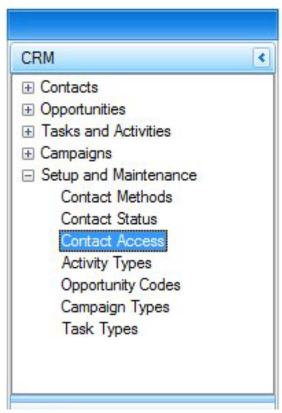
The screen will be displayed in a manner that is determined by the **Contact Access Business Rule** (page 4-5). The choices are **Manual** or **Filter**.

You must first use the **System Manager**, **Administration**, **User Mapping** function to assign User ID's to Sales Reps to have the contact access work properly. See the Setting up User Mapping section (page 4-21) for details on setting this up.

Follow these steps to work with **Contact Access** records:

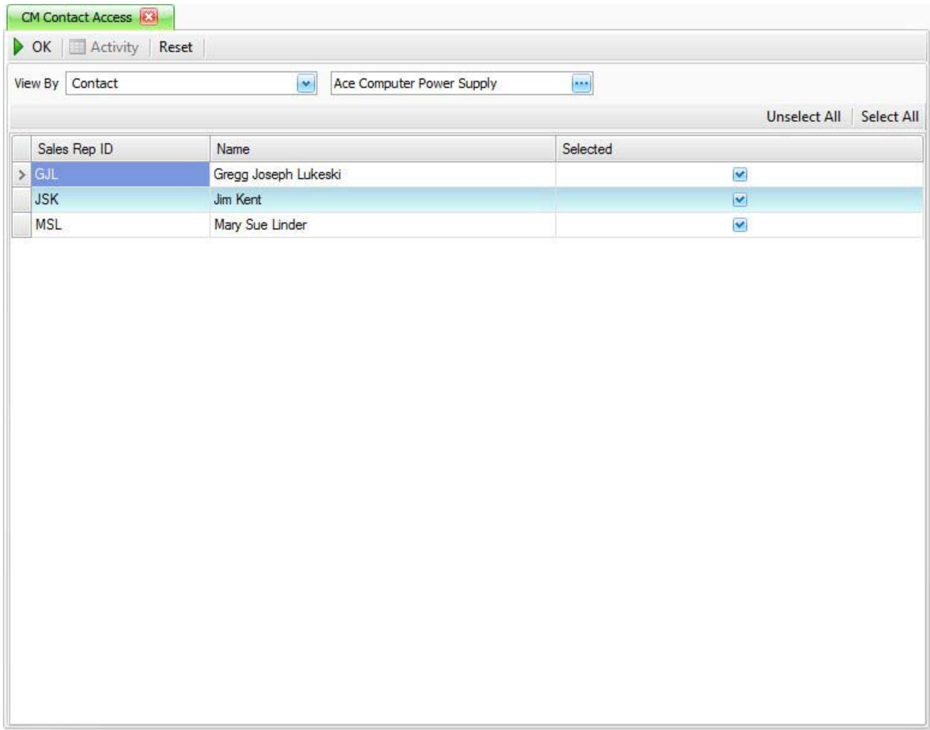
1. Select **Contact Access** from the **Setup and Maintenance** menu.

Contact Access Menu

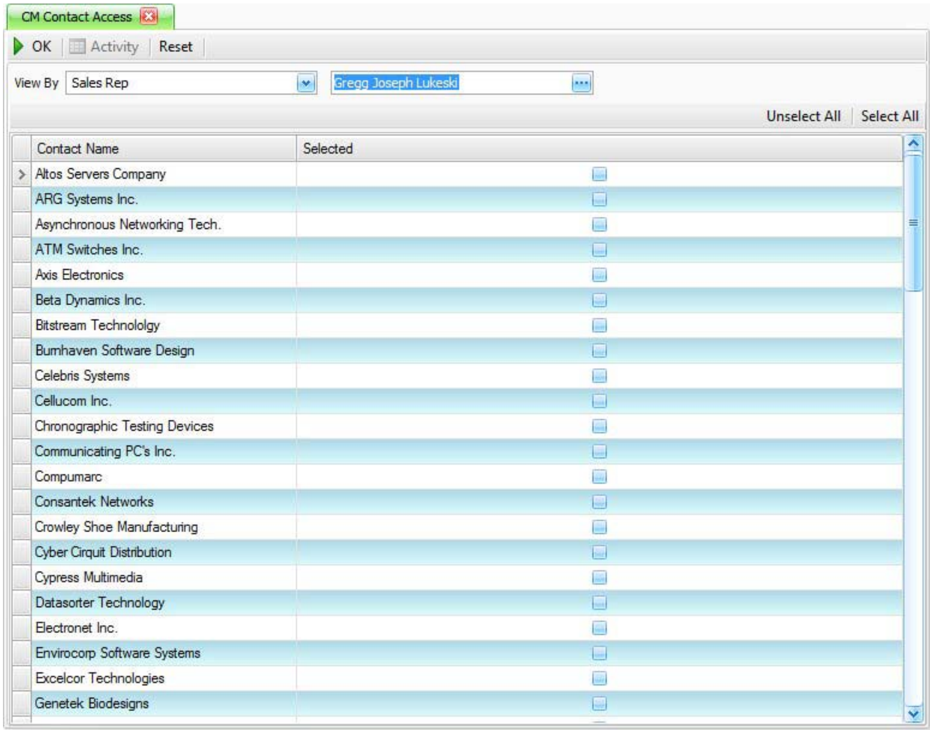


2. The **Contact Access** screen appears.

Contact Access Screen Manual (Contact)



Contact Access Screen Manual (Sales Rep)



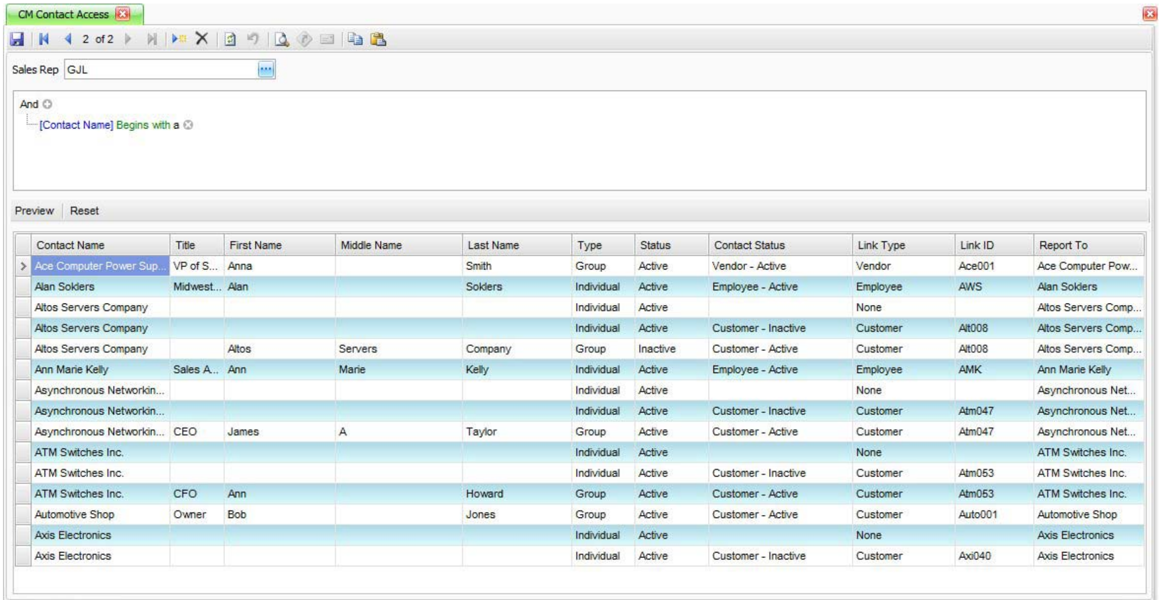
3. Select whether to view access by **Contact** or **Sales Rep** from the **View By** field.
4. Select the **Contact** or **Sales Rep** for which you want to view Contact Access.
5. Select the check box adjacent to the Contact or Sales Rep to who you want to grant access. You can use the **Unselect All** and **Select All** buttons accordingly to unselect or select all of the check boxes at once.

NOTE: Unselecting a check box will deny the sales rep access to the contact.

6. Click **OK** to process the Contact Access.

NOTE: Click Reset to set all fields to their default values.

Contact Access Screen Filter



1. Click the **New Record** button on the toolbar to enable the **Sales Rep** ID field.
2. Select the **Sales Rep** ID for which you want to set Contact Access.
3. Use the filter area to filter the contacts that will be displayed and click **Preview** to display the contacts that meet the filtering criteria. Click **Reset** to clear the filtering and start over.
4. When the contacts displayed are the contacts this sales rep should have access to, click the **Save** icon to save the contact access for this Sales Rep.
5. Select the next Sales Rep and follow the steps above.

Producing a Contact Access List

Print the **Contact Access List** to view and verify the contact access options you entered in the Setup and Maintenance **Contact Access** function.

Follow these steps to print the **Contact Access List**:

1. Select the **Print Preview** button to preview the list of Contact Access contacts. You may also right click in the gray box in the upper left corner of the grid and select **Preview**.
2. The **Preview Report** screen appears.
3. Select the **Print** button in the toolbar to print your list.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Contact Access List

Sample Comp with CRM
CM Contact Access

Page 1

Contact Name	Selected
Altos Servers Company	☑
ARG Systems Inc.	☑
Asynchronous Networking Tech.	☑
ATM Switches Inc.	☑
Axis Electronics	☑
Beta Dynamics Inc.	☑
Bitstream Technololgy	☑
Burnhaven Software Design	☑
Celebris Systems	☑
Cellucom Inc.	☑
Chronographic Testing Devices	☑
Communicating PC's Inc.	☑
Compumarc	☑
Consantek Networks	☑
Crowley Shoe Manufacturing	☑
Cyber Cirquit Distribution	☑
Cypress Multimedia	☑
Datasorter Technology	☑
Electronet Inc.	☑
Envirocorp Software Systems	☑
Excelcor Technologies	☑
Genetek Biodesigns	☑
Integrated Cirquitry	☑
Integrated Technologies	☑
Isotek Software Solutions	☑
LexiMarc Inc.	☑
Madison General Hospital	☑
Magovation Inc.	☑
Megatrends Computer Systems	☑
Meritec Networks	☑
Micro-Devices	☑
Micronics Systems Inc.	☑
Microtronic Inc.	☑
Minnesota Northern Laboratory	☑
Modular Networks	☑
Monolithic Networks	☑
Montana Memory Systems	☑
Mouse Products Inc.	☑
Mycor Advanced Intell Systems	☑
Nanoprocessing Inc.	☑
National Semiconductors	☑
NorTek Enterprise Solutions	☑
Octasystems	☑
Pacific Computer Distribution	☑
Penstar Advertising Designs	☑
Pikus Electronics Inc.	☑
Poly Corp	☑

7/5/2012 8:09 AM kenthe

SETTING UP USER MAPPING

Use the **User Mapping** function to assign your User ID's to a Sales Rep, Customer, Vendor or Employee record.

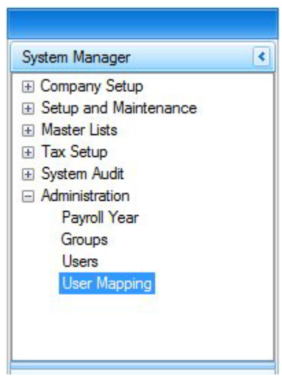
NOTE: For CRM Contact Access, Sales Rep ID is the only user mapping that will set restrictions on the Contact Access.

This will either grant or take away access to contact records within the Contact Access function.

Follow these steps to work with **User Mapping**:

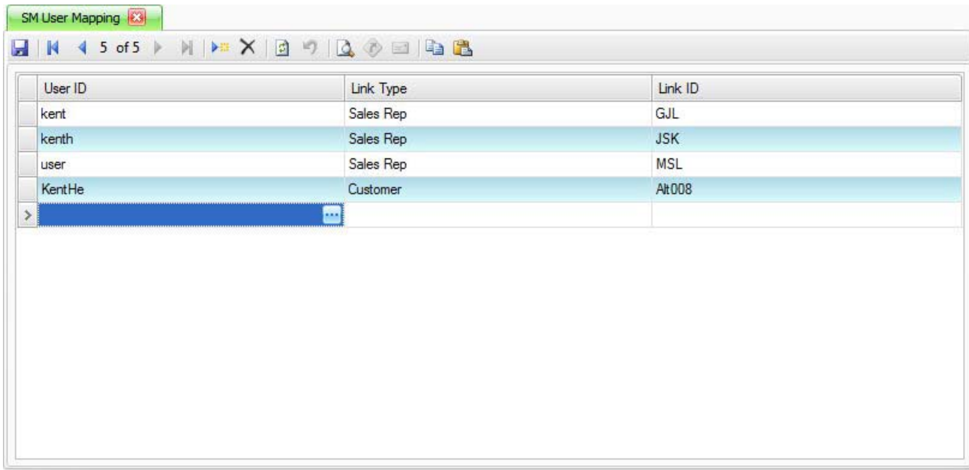
1. Select **User Mapping** from the **System Manager, Administration** menu.

User Mapping Menu



2. The **User Mapping** screen appears.

User Mapping Screen



3. Select the **User ID** you want to map to the Link Type selected.
4. Select the **Link Type** for which to map the user: **Customer**, **Vendor**, **Employee** or **Sales Rep**.
5. Select the record for the **Link ID** for which to link this User ID. This value will change depending on the Link Type you selected.
6. Click the **Save** button to save the User Mapping.

Producing a User Mapping List

Print the **User Mapping List** to view and verify the contact status descriptions you entered in the System Manager, Administration, **User Mapping** function.

Follow these steps to print the **User Mapping List**:

1. Select the **Print Preview** button to preview the list of User Mappings. You may also right click in the gray box in the upper left corner of the grid and select **Preview**.
2. The **Preview Report** screen appears.
3. Select the **Print** button in the toolbar to print your list.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

User Mapping List

Sample Comp with CRM
SM User Mapping

Page 1

User ID	Link Type	Link ID
user	Sales Rep	MSL
kent	Sales Rep	GJL
kenth	Sales Rep	JSK
KentHe	Customer	Alt008

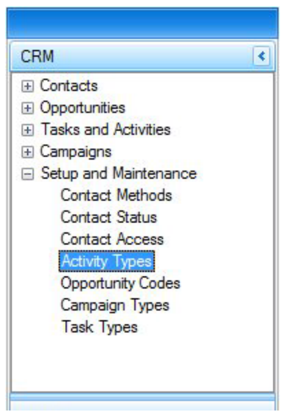
ACTIVITY TYPES

Activities record actions related to a specific Contact. There are two sources of Activities: Automatic Activities entered by the system, and Manual Activities that you add to Contact records yourself. For example: when you send a Bulk Communication, the system automatically records that Activity for all Contacts who received the Communication. Use the **Activity Types** function to enter descriptions for the manual Activities you add to Contact records.

To set up **Activity Type** descriptions, follow these steps:

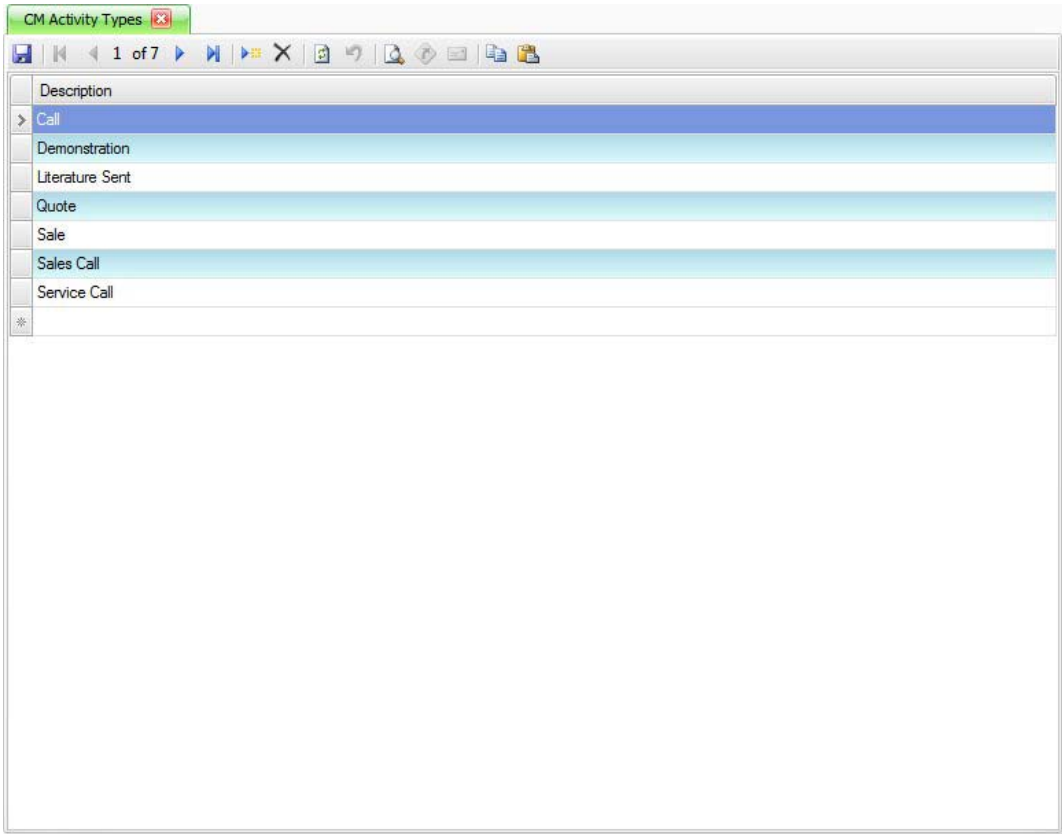
1. Select **Activity Types** from the **Setup and Maintenance** menu.

Activity Types Menu



2. The **Activity Types** screen appears.

Activity Types Screen



3. Enter the **Descriptions** to use within CRM. When you create Activities, you assign them one of the Types entered.

NOTE: Because Activities (which record actions and history for a specific Contact) can be similar to Tasks (which record the things you or your employees need to do to further communications with a Contact), there may be overlap between the Activity Type Descriptions, and those in the Task Type function.

4. To delete a Description, select the Activity Type **Description** to delete and click the **Delete** button on the toolbar. When the confirmation message appears, select **Yes** to delete the description or **No** to return to the screen without deleting. You cannot delete a description that has been assigned to an activity.

Producing an Activity Type List

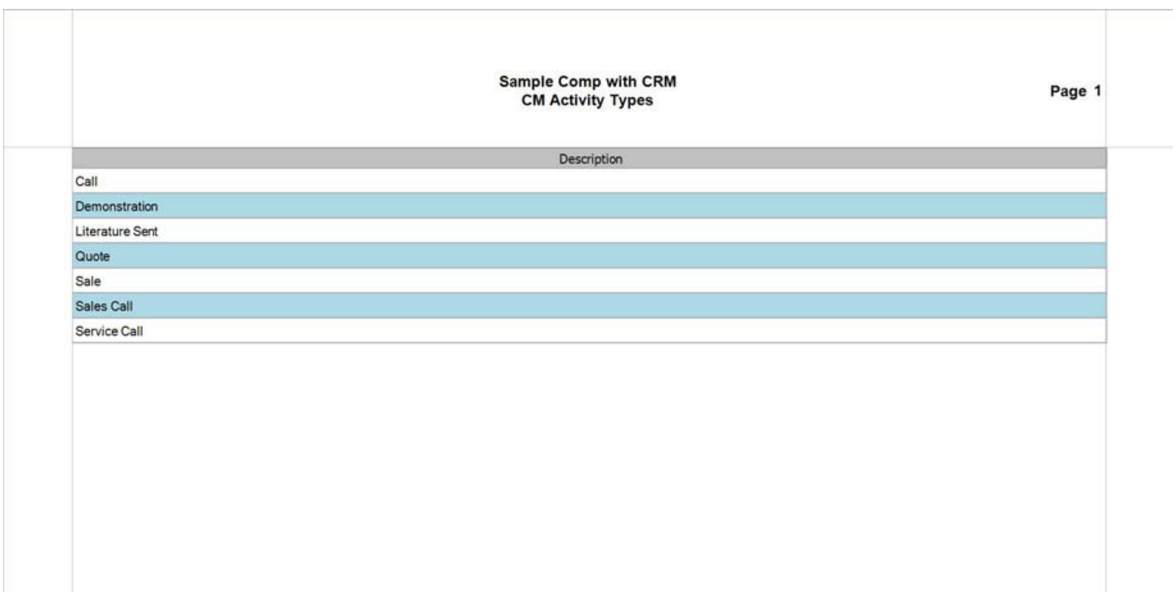
Print the **Activity Type List** to view and verify the activity type descriptions you entered in the Setup and Maintenance **Activity Types** function.

Follow these steps to print the **Activity Type List**:

1. Select the **Print Preview** button to preview the list of activity types. You may also right click in the gray box in the upper left corner of the grid and select **Preview**.
2. The **Preview Report** screen appears.
3. Select the **Print** button in the toolbar to print your list.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Activity Type List



Sample Comp with CRM
CM Activity Types

Page 1

Description
Call
Demonstration
Literature Sent
Quote
Sale
Sales Call
Service Call

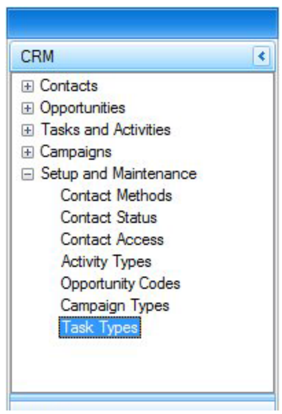
TASK TYPES

Tasks record the things you (or your employees) need to do or complete to further communications with a Contact and record the actions that were taken in response to or to complete a Task, along with any Notes about the Resolution. Use the **Task Types** function to enter Descriptions for the Tasks you add to and manage within CRM.

To set up **Task Type** descriptions, follow these steps:

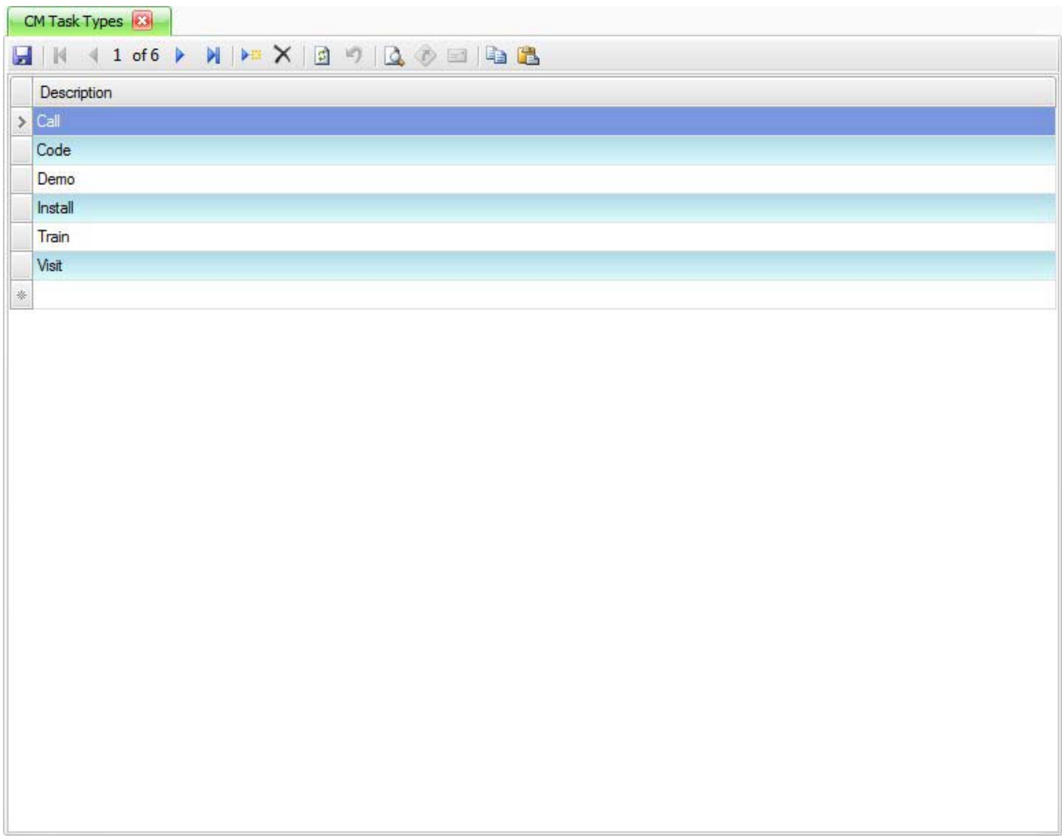
1. Select **Task Types** from the **Setup and Maintenance** menu.

Task Types Menu



2. The **Task Types** screen appears.

Task Types Screen



3. Enter the **Descriptions** to use within CRM. When you create Tasks, you assign them one of the Task Types entered.

4. Close the screen to save your changes and return to the menu.

NOTE: Because Tasks can be similar to Activities (which record actions and history relating to a specific Contact), there may be some overlap between the Task Type Descriptions, and the Activity Types function.

5. To delete a Description, select the Task Type **Description** to delete and click the **Delete** button on the toolbar. When the confirmation message appears, select **Yes** to delete the Task Type Description or **No** to return to the screen without deleting. You cannot delete a Task Type Description that has been assigned to a Task or Response.

Producing a Task Type List

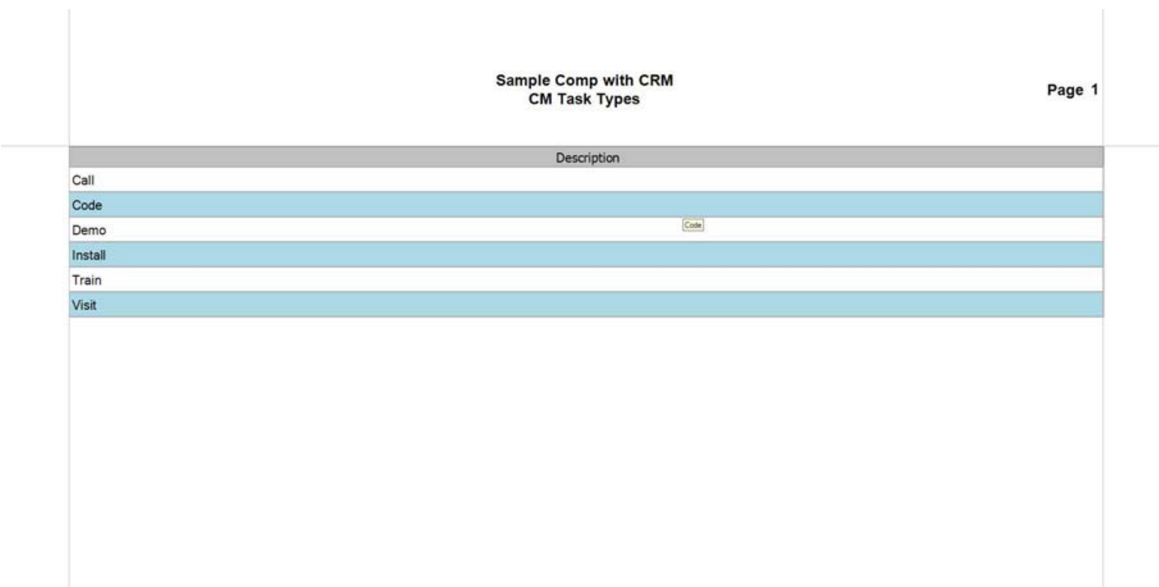
Print the **Task Type List** to view and verify the task type descriptions you entered in the Setup and Maintenance **Task Types** function.

Follow these steps to print the **Task Type List**:

1. Select the **Print Preview** button to preview the list of Task Types. You may also right click in the gray box in the upper left corner of the grid and select **Preview**.
2. The **Preview Report** screen appears.
3. Select the **Print** button in the toolbar to print your list.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Task Type List



Sample Comp with CRM
CM Task Types
Page 1

Description
Call
Code
Demo
Install
Train
Visit

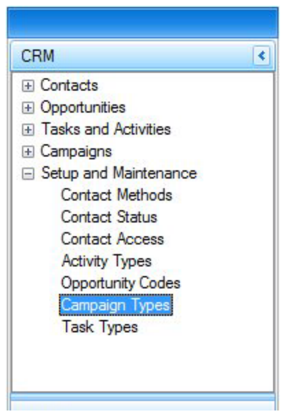
CAMPAIGN TYPES

Use the **Campaign Types** function to set up descriptions for the various Campaigns you initiate through CRM. Because Campaigns generally use media outlets as delivery methods, examples of these descriptions can include Print, Radio, and Internet/Web.

To set up **Campaign Type** descriptions, follow these steps:

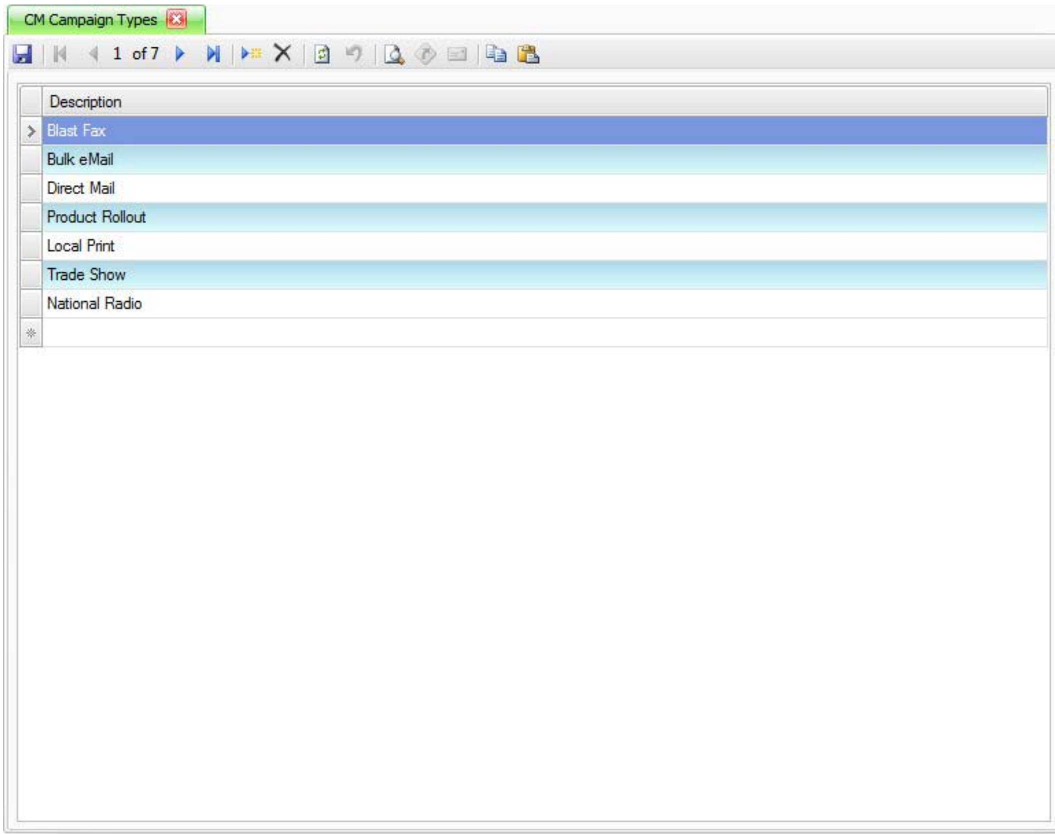
1. Select **Campaign Types** from the **Setup and Maintenance** menu.

Campaign Types Menu



2. The **Campaign Types** screen appears.

Campaign Types Screen



3. Enter the **Descriptions** to use within CRM. When you create Campaigns, you assign them one of the Campaign Types entered.

4. Close the screen to save your changes and return to the menu.

5. To delete a Campaign Type description, select the description to delete and click the **Delete** button on the toolbar. When the confirmation message appears, select **Yes** to delete the Campaign Type Description or **No** to return to the screen without deleting. You cannot delete a Campaign Type Description that has been assigned to a Campaign.

Producing a Campaign Type List

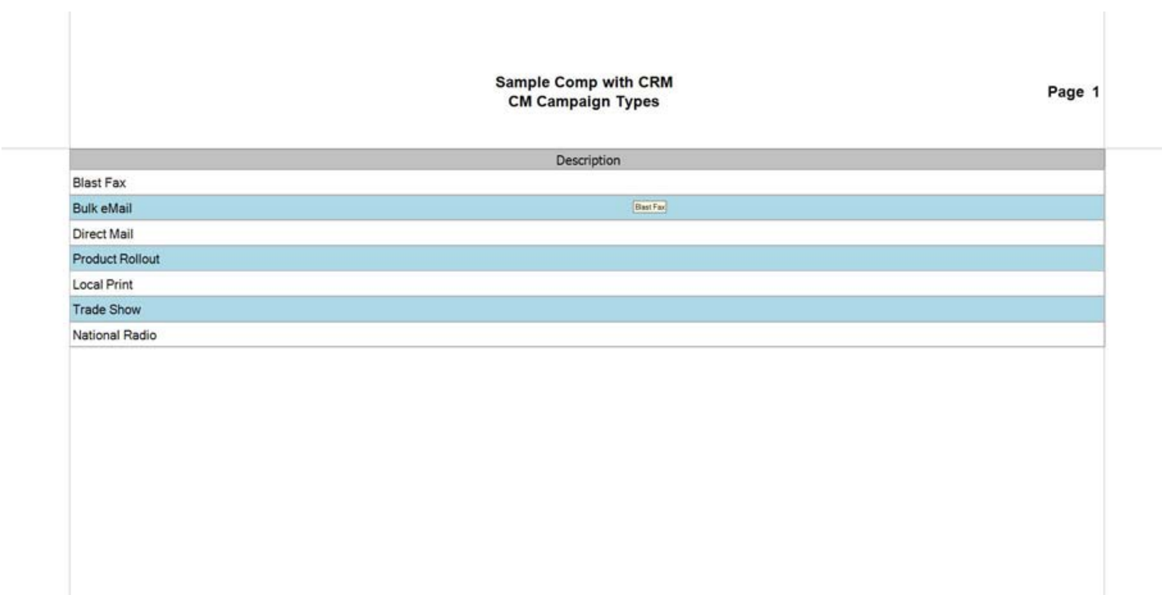
Print the **Campaign Type List** to view and verify the campaign type descriptions you entered in the Setup and Maintenance **Campaign Types** function.

Follow these steps to print the **Campaign Type List**:

1. Select the **Print Preview** button to preview the list of Campaign Types. You may also right click in the gray box in the upper left corner of the grid and select **Preview**.
2. The **Preview Report** screen appears.
3. Select the **Print** button in the toolbar to print your list.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Campaign Type List


Sample Comp with CRM
CM Campaign Types
Page 1

Description
Blast Fax
Bulk eMail
Direct Mail
Product Rollout
Local Print
Trade Show
National Radio

OPPORTUNITY CODES

Use the **Opportunity Codes** function to set up the code Descriptions you assign to Opportunities. Examples of Opportunity Codes can include terms (Firm, Weak, Excellent, Poor, and so on) and probability percentages (10%, 50%, 90%) and so on.

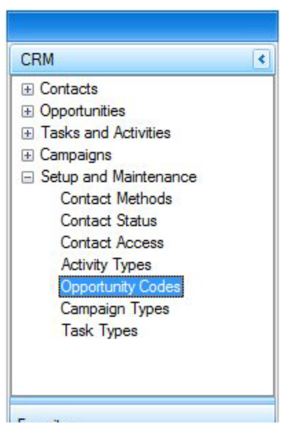
You can set up three types of Opportunity Codes:

- **Status** Codes describe the Opportunity's status. Examples are New, Closed, On Hold, and so on.
- **Probability** Codes describe the likelihood of success for the Opportunity. Examples are terms like (Poor, Fair, Good, Excellent), or temperature or color codes (Cold, Lukewarm, Hot, or Blue, Green, Yellow, Red) and percentages (10%, 50%, and so on).
- **Resolution** Codes describe how the Opportunity was resolved. Examples include Good Sale, Lost to Competition, Difficult Deal, and so on.

To set up **Opportunity Codes**, follow these steps:

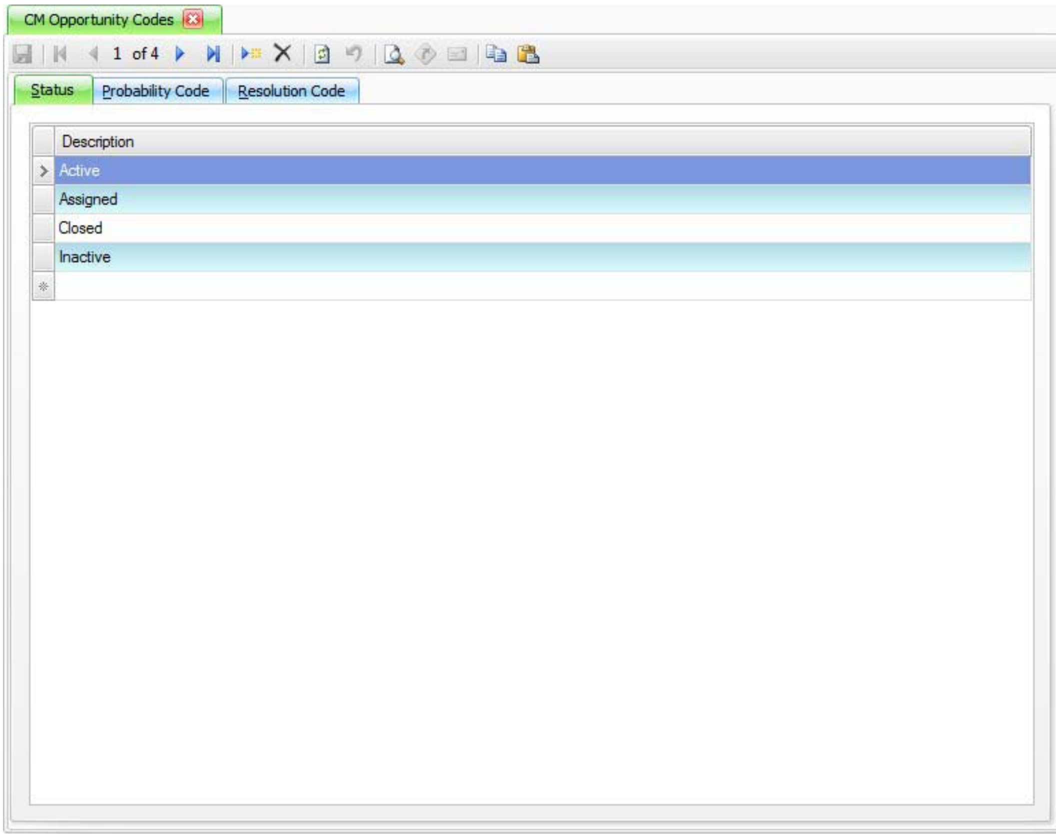
1. Select **Opportunity Codes** from the **Setup and Maintenance** menu.

Opportunity Codes Menu



2. The **Opportunity Codes** screen appears with the **Status** tab displayed.

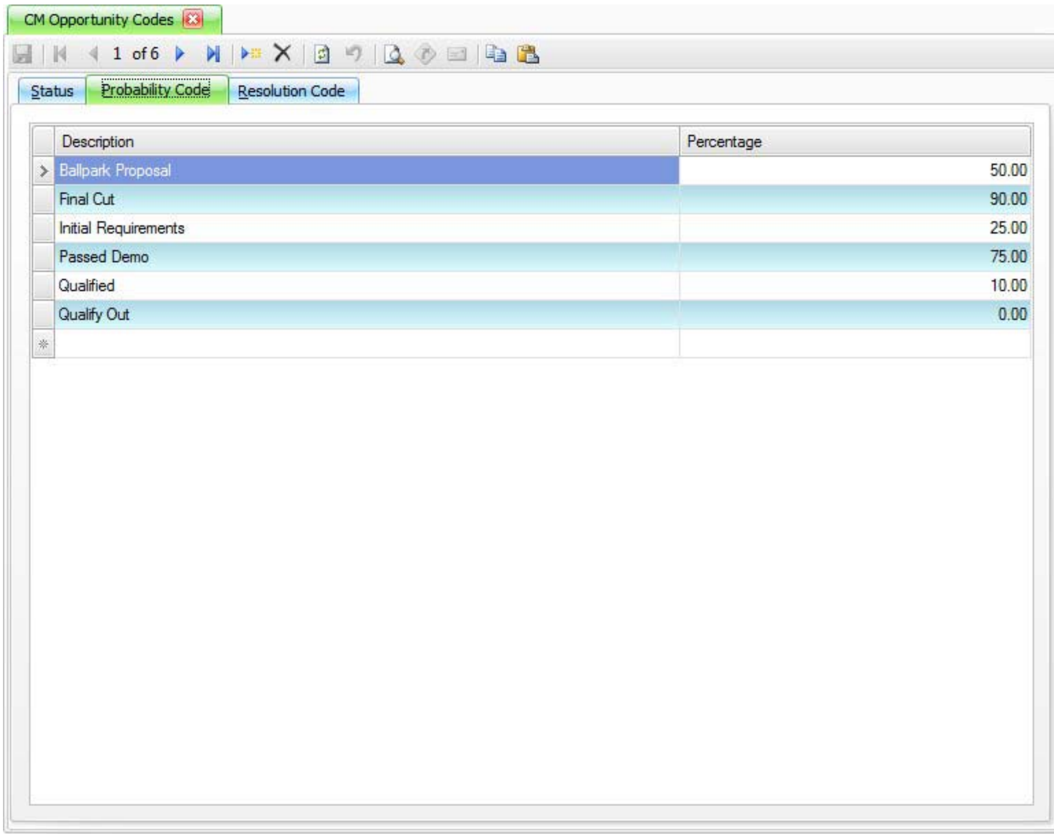
Opportunity Codes Screen - Status Tab



3. Enter the **Description** you want to use for the different **Statuses** of the Opportunity. Examples are New, Closed and On Hold.

4. Click on the **Probability Codes** tab to enter the probability of the sale.

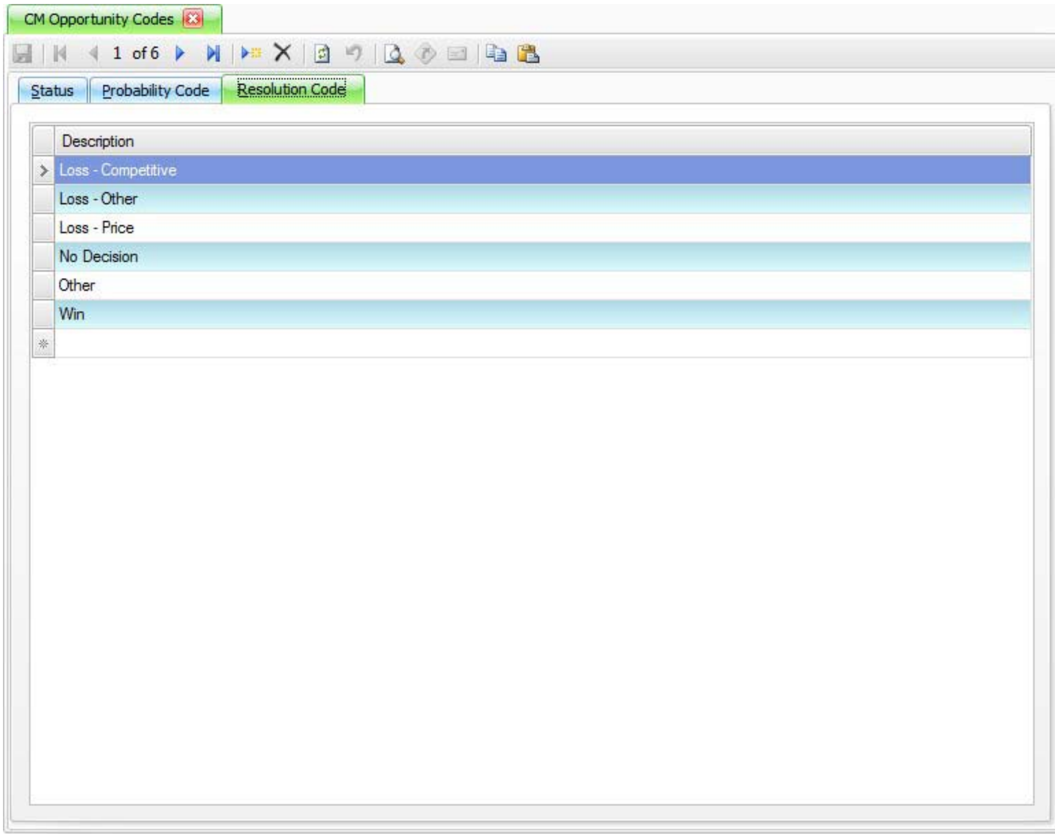
Probability Codes Tab



5. Enter the **Probability Code** and the **Percentage** of the probability for the Opportunity. Examples are Good 50%, Poor 15% and Excellent 90%.

6. Click on the **Resolution Code** tab to enter the **Description** to use to show the Resolution of the Opportunity.

Resolution Code Tab



7. Enter the **Description** of the **Resolution Code** for the Opportunity. Examples are Good Sale, Lost to Competition and Difficult Sale.

8. To delete an Opportunity Code Description, select the Description to delete and click the **Delete** button  on the toolbar. When the confirmation message appears, select **Yes** to delete the Opportunity Code Description, or **No** to return to the screen without deleting. You cannot delete a description that has been assigned to an opportunity.

Producing an Opportunity Code List

Print the **Opportunity Code List** to view and verify the Opportunity Code Descriptions you entered in the Setup and Maintenance **Opportunity Codes** function.

Follow these steps to print the **Opportunity Code List**:

1. Select the tab for which you want to print the list.
2. Select the **Print Preview** button to preview the list of Opportunity Codes. You may also right click in the gray box in the upper left corner of the grid and select **Preview**.
3. The **Preview Report** screen appears.
4. Select the **Print** button in the toolbar to print your list.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Opportunity Code List

Sample Comp with CRM
CM Opportunity Codes

Page 1

Description
Active
Assigned
Closed
Inactive

Sample Comp with CRM
CM Opportunity Codes

Page 1

Description	Percentage
Ballpark Proposal	50.00
Final Cut	90.00
Initial Requirements	25.00
Passed Demo	75.00
Qualified	10.00
Qualify Out	0.00

Sample Comp with CRM
CM Opportunity Codes

Page 1

Description
Loss - Competitive
Loss - Other
Loss - Price
No Decision
Other
Win

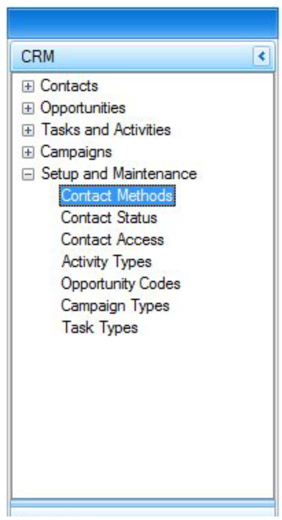
CONTACT METHODS

Use the **Contact Methods** function to enter different types of Contact Methods to use, such as personal email, business fax, home phone, etc. When you set up Contact Methods, you define the type of information they contain and their caption. The fields you set up are available on the Contact screen.

Follow these steps to set up **Contact Methods**:

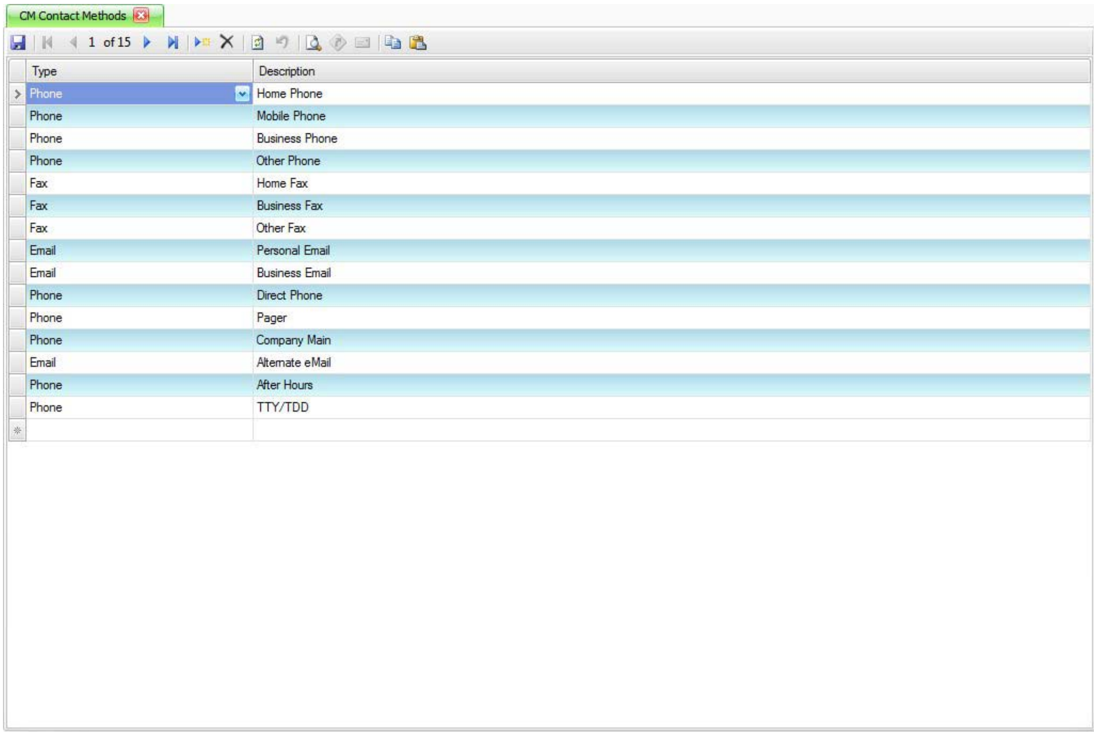
1. Select **Contact Methods** from the **Setup and Maintenance** menu.

Contact Methods Menu



2. The **Contact Methods** screen appears.

Contact Methods Screen



3. Select the **Type** you want to set up or edit.

    - The **Type** indicates what sort of information (such as phone number, web site, email or fax number) goes into the field. Depending on the format type, TRAVERSE automatically applies a mask to the field's contents to display them correctly (for example, formatting U.S. phone numbers as (###)-###–####). Select the format type to use for the field: **Phone**, **Fax**, **Email**, or **Web**.

    When you select Email and Fax for the format Type, the Bulk Communications will look for fields of these Types when you are sending your Bulk Communications by email or fax, to determine the email address and fax number to use to send them.

4. The **Description** is what will appear as the label next to the field set up as a Contact Method. These Descriptions should be a label that you will recognize as a label for the information you want to enter into the field.

5. To delete a Contact Method Type, select the Type to delete and click the **Delete** button on the toolbar. When the confirmation message appears, select **Yes** to delete the Contact Method Type or **No** to return to the screen without deleting.
6. To enter or edit a field for a different Contact Method Type, select that Type and repeat steps 3 and 4 as many times as needed. TRAVERSE automatically saves your entries when you switch Contact Method Types.
7. Close the screen to save your changes and return to the menu.

Producing a Contact Methods List

Print the **Contact Methods List** to view and verify the Contact Methods you entered in the Setup and Maintenance **Contact Methods** function.

Follow these steps to print the **Contact Methods List**:

1. Select the **Print Preview** button to preview the list of Contact Methods. You may also right click in the gray box in the upper left corner of the grid and select **Preview**.
2. The **Preview Report** screen appears.
3. Select the **Print** button in the toolbar to print your list.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Contact Methods List

Sample Comp with CRM
CM Contact Methods

Page 1

Type	Description
Phone	Home Phone
Phone	Mobile Phone
Phone	Business Phone
Phone	Other Phone
Fax	Home Fax
Fax	Business Fax
Fax	Other Fax
Email	Personal Email
Email	Business Email
Phone	Direct Phone
Phone	Pager
Phone	Company Main
Email	Alternate eMail
Phone	After Hours
Phone	TTY/TDD

CONTACTS

5

OVERVIEW

Use the functions on the **Contacts** menu to set up and maintain your Contact records, add Tasks, Activities and Opportunities to your Contacts. Print Contact Labels to use in your Bulk Communications. Print your Contact List to have a detailed paper or file record of your Contact information. Synchronize your Contact and linked records so you don't have to make changes more than once on a Contact or Vendor, Customer or Employee record. View in one place your basic Contact information, a list of Tasks, Activities, Opportunities, and Contact Methods, all on one screen in the CRM Dashboard. Find Contact information using the Contact Interactive View.

Contacts

Use the **Contacts** function to set up Contact records. Contacts form the basis of the CRM system: after you set up Contact records, you can track all activity for a specific Contact, send out Bulk Communications, and follow up on sales Opportunities. Each Contact record represents a single company, business or individual. You add the individuals you work with at that company, and then select them as members of the company Contact record. (page 5-5)

Contact Labels

Use the **Contact Labels** function to print mailing or standard labels for contacts for a Campaign. When you print labels, CRM automatically adds an Activity with a system Activity type to the Contacts involved to record that action.

Contact List

Print the **Contact List** to view a list of the Contact information you entered in the Setup and Maintenance **Contacts** function.

Synchronize Contacts

CRM lets you quickly create Contact records from the Vendor, Customer, and Employee data already stored within TRAVERSE, or generate a Vendor or Customer from a contact, and link the Contact record to the source record. As you update Contact and source information during normal processing, however, these records can get out of sync. Use the **Synchronize Contacts** function to copy changes from Contact records to their linked records and vice versa. If necessary, you can also skip the copy process for records with many changes so that you can make those changes manually.

CRM Dashboard

Use the **CRM Dashboard** function to view recent activity and opportunities for your contacts.

Contact View

Use the **Contact View** function to view information about a Contact. You can design the view with a variety of columns, filtering and grouping and save the views by name to recall at a later date.

Contact Method View

Use the **Contact Method View** function to view information on contact methods. You can design the view with a variety of columns, filtering and grouping and save the views by name to recall at a later date.

CONTACTS

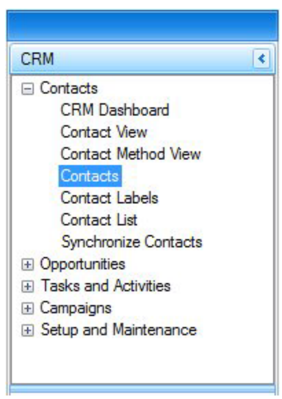
Use the **Contacts** function to set up Contact records. Contacts form the basis of the CRM system: after you set up Contact records, you can track all activity for a specific contact, send out Bulk Communications, and follow up on sales Opportunities. Each Contact record represents a single company, business or individual. You add the individuals you work with at that company, and then select them as members of the company Contact record.

You can copy information from the Vendor, Customer, and Employee information already stored in Accounts Payable, Accounts Receivable, and Payroll to quickly create Contact records. If you allow linking to these records, you can copy any changes you make to the Contact information in CRM, back to the appropriate records in those applications. You can also synchronize contact information between CRM and other allowed links if you have made several changes in both places and didn't copy those changes over as you made them.

Follow these steps to add a new **Contact** record:

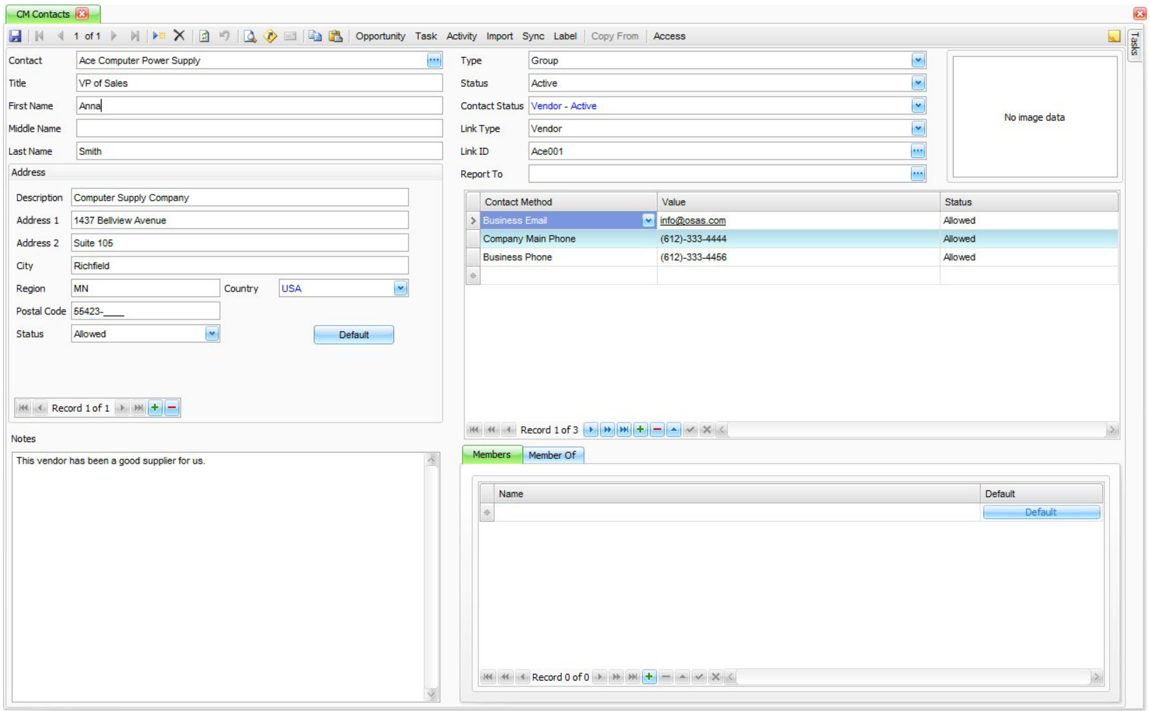
1. Select **Contacts** from the **Contacts** menu.

Contacts Menu



2. The **Contacts** screen appears.

Contacts Screen

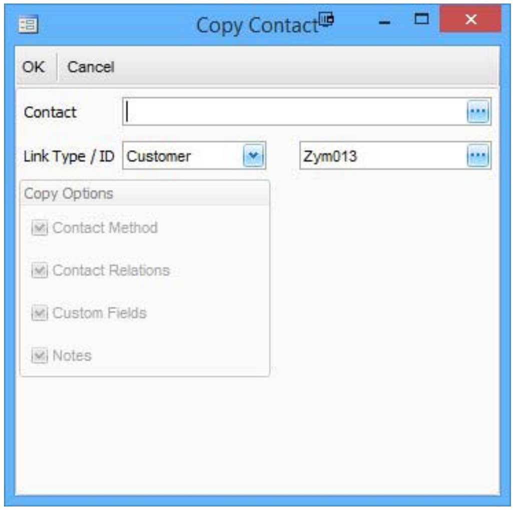


3. Click the **New Record** button  on the toolbar to clear the screen (if necessary) to enter a new contact.

4. Enter the **Contact Name** and select the **Contact Status**.

   You set up this status using the **Contact Status** function (page 4-11).

5. To copy information from a Vendor, Customer, or Employee record to set up this contact, click the **Copy From** button. (You can also copy information from existing contact records to create a new contact). The **Copy Contact** dialog box appears.



- To copy information from an existing contact record, enter the **Contact Name** and select the check boxes next to the information you want to copy.
- To copy information from a Customer, Vendor, or Employee record, select the **Link Type** and the **ID** from which to copy information.
- The **Copy Options** check boxes are available only when you copy information from another Contact record. Because the information listed does not exist in Accounts Payable, Accounts Receivable, or Payroll, these check boxes are not available when you copy information from a Vendor, Customer, or Employee record.
- Click **OK** to copy information from the source you specify and create the new Contact record.

6. If you are adding an individual person enter their **Title.**
7. If you are adding an individual person enter their **First Name**, **Middle Name** and **Last Name.**
8. Enter the contact's **Address** information.
9. Select the **Status** for the address. This selection will determine if the address is used when printing Contact Labels:
    - The status of **Allowed** will be included in the Contact Label printing.
    - The status of **Not Allowed** will be excluded from the Contact Label printing.

You might want to use the Not Allowed option for those contacts set up as individual people working for a company. You have no need to print the address for these individuals in a bulk communication.

10. Use the **Add Record** button ( ) to add additional Addresses for the Contact.

    If you want to remove an Address, use the **Delete Record** ( ) button.

11. Enter **Notes** about the contact.

12. Select the Contact **Type**: **Individual** or **Group**.

    This will be used as filtering criteria for views and reports only.

13. Select the **Status** for the Contact: **Active** or **Inactive**.

    This will be used as filtering criteria in views and reports.

Maint

14. Select the **Contact Status** for the Contact. The choices for this field will be selections from your **Contact Status** setup(page 4-11).

15. Select the **Link Type** of **None**, **Vendor**, **Customer** or **Employee**. The selections here will be determined on the Business Rules for linking to the functions in the list. When Vendor, Customer, or Employee are selected the Link ID field will be activated.

16. Select the **Link ID** to link the contact to a **Vendor**, **Customer** or **Employee**. The Link ID will be updated automatically if you have copied from a Vendor, Customer or Employee from the Copy Contact screen when creating a new Contact.

17. Load or link to an image by right clicking in the **Image** box and selecting **Load** and browsing to the image file. The image will be Embedded into the database or Linked, depending on the Business Rule (page 4-5) you selected.

Maint

18. Select the **Contact Methods** you want to add to this Contact. To add a **New Record** click on the green plus button at the bottom of the box, and select the Contact Method to add. To delete records, select the record to **Delete** and click the red minus button , at the bottom of the box.

    - After selecting the Contact Method enter the **Value** for the Contact Method. The allowed information for the value will be determined by the Type of Contact Method.

    - Select the **Status** of the Contact Method:

        - The **Allowed** status will include the information from this Contact Method in Bulk Communications set up to use this Contact Method.

        - The **Not Allowed** status will exclude the information from this Contact Method in Bulk Communications set up to use this Contact Method.

19. Use the **Members** and **Members Of** tabs to add individual persons to the Contact records for companies and to see the Contacts the individual people are members of.

    - On the **Members** tab select the individual people you have set up as Contacts, into the company contact records. You must have the company Contact record displayed to add individuals as members of that company.
    - To add a **New Record** click on the green plus button, and select the **Name** to add. To delete records, select the record to **Delete** and click the red minus button, at the bottom of the box.
    - Select the **Default** button to select one of the Members as the default Contact Member.
    - The **Member Of** tab is used to display the company individuals are a Member Of. Once an individual person has been added to the company Contact record using the Members tab, you will see the company the person is a member of on the Member Of tab.

20. Select the **Save** button to save your changes.

    If you selected the **Prompt to Update Linked Information** option in the **Business Rules** function (page 4-5), and you made any changes to contact information, a message appears asking whether to update linked records.

Editing Contact Information

To edit contact information, select **Contacts** from the **Setup and Maintenance** menu.

Click the lookup icon, to access the filter box that helps you search for and select a record in several different ways.

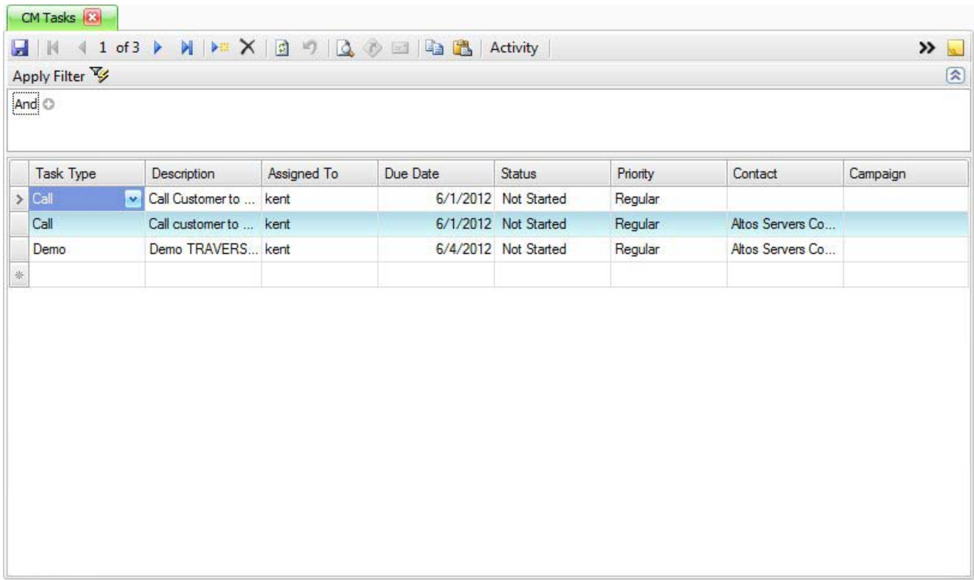
NOTE: The hot key F4 is available for this function.

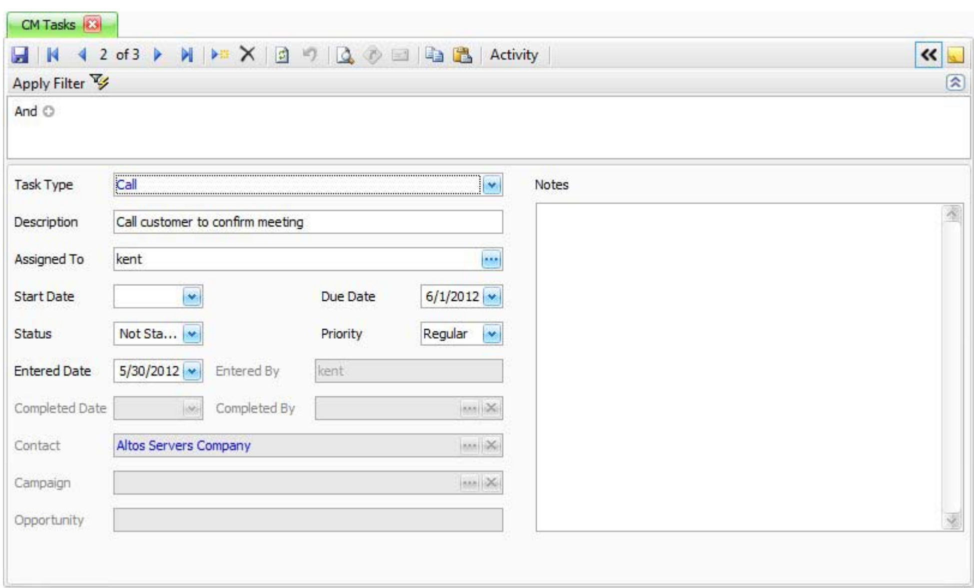
When the Contact screen appears, select the **Contact Name**, then use the area on the screen you want to edit, to edit information associated with the Contact.

If necessary, click the **Sync** button to copy any changes back to the linked Vendor, Customer, or Employee record, then click the **Save** button and close the screen to save your changes and return to the menu.

Creating Tasks

To add a Task that is related to the Contact, click **Tasks** when it appears on a screen. The **Tasks** screen appears (note the Tasks entered for this Contact are displayed on the screen.). When you add a new Task the Contact information will automatically fill in.





Select the **Task Type** and enter a **Description**, then enter the employee **Assigned To** completing the Task. You can also select how long the task should appear in task lists, adjust the **Due Date**, and edit the date the task was entered. Finally, enter any additional instructions or information in the **Notes** window. Close the screen to save your changes and return to the Activity screen. See the Tasks function (page 7-5) for detailed information on entering Tasks.

Deleting Contacts

To delete a Contact record, select **Contact** from the **Setup and Maintenance** menu. When the Contact screen appears, select the **Contact Name** you want to delete and press the **Delete** hot key (F3) or the **Delete** button on the toolbar. When the confirmation message appears, click **Yes** to delete the record or **No** to return to the Contact screen without deleting.

Command Buttons

The **Opportunity** button lists all Opportunities you have entered relating to this contact.

- Select the Opportunity and click the Detail/Summary arrows to open the detail opportunity screen (page 6-5) to view or edit the information associated with that Contact.
- Use the **Notes** box to record any additional information or notes about the Contact for your company's use.
- Press **Ctrl+Enter** to begin a new line, if necessary.

The **Task** button lists all tasks you have entered relating to this contact. See the Creating Tasks section on the previous page for details on adding a new task.

The **Activity** button lists all actions related to this contact.

- Select the Activity and click the Detail/Summary arrows to open the detail Activity screen (page 7-25) to view or edit the information associated with that Activity.
- Activity types reserved for use by the system (Contact Created, Contact Updated, and so on) appear in the list along with the activity types you entered. You can do filtering on each column displayed or use the server filter area at the top of the screen. If the server filter area is not displayed click the hide/display arrows at the top of the screen to show the filtering area.

The **Import** button will allow you to import contact information from a text file. You must have the import information set up in System Manager, Import Layout Definition and Import Map Definition to be able to use the Import function. See the System Manager Training Manual for details on setting up the Import Definitions.

The **Sync** button will allow you to synchronize the information you have entered, or edited for the Contact, if it is linked to a Customer, Vendor or Employee.

The **Label** button will allow you to print a label for the displayed contact.

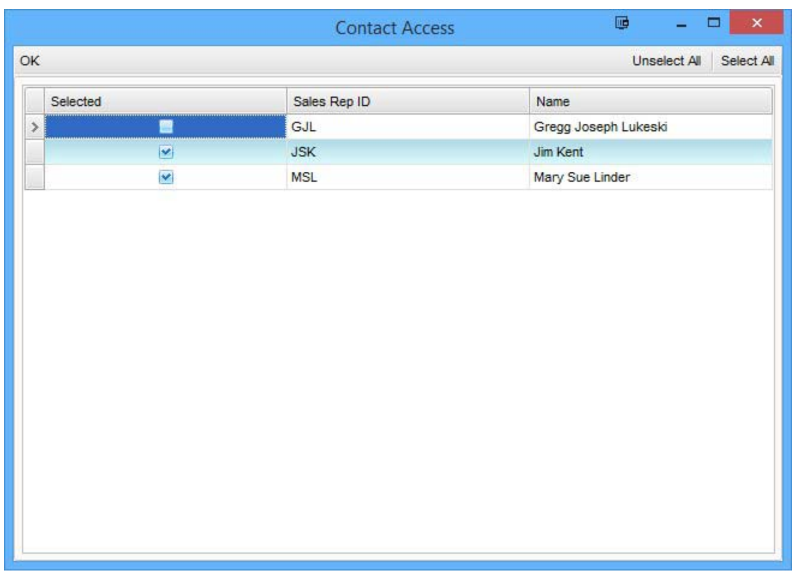
The **Copy From** button will allow you To copy information from a Vendor, Customer, or Employee record when adding a new Contact.

The **Access** button will allow you to grant Contact Access (page 4-15) to a sales rep associated to a user in the System Manager, User Mapping. See the (page 4-21) for details on User Mapping.

NOTE: The Access button will only be activated when Manual is selected for the Contact Access business rule (page 4-5).

- Selecting the **Access** button will open the **Contact Access** screen.

Contact Access Screen



- The **Sales Rep IDs** and **Name** set up in Accounts Receivable, Sales Reps setup will be displayed.

NOTE: The Sales Rep ID must be associated with a user in the System Manager, User Mapping (page 4-21) function before contact access will be granted and hide or display the contact for that user.

- Select the **Sales Rep ID**(s) you want to grant access to for this contact by clicking the check box in the **Selected** column. Click **Select All** to select all displayed sales reps. Click **Unselect All** to unselect all the sales reps displayed.
- Click **OK** to save the changes made to the contact access.
- Close the **Contact Access** screen to return to the Contacts screen.

Task Pane

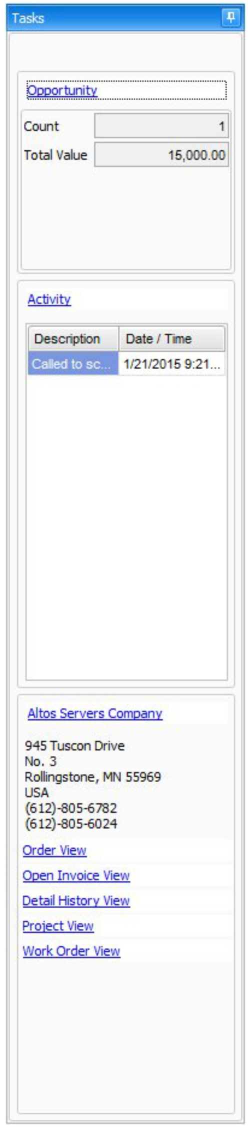
Use the Task Pane on the contact screen to show additional information and browse to other areas of the software.

The Task Pane can be accessed by clicking on the Tasks tab in the upper right corner of the Contacts screen.

There are three sections to the Contact Task Pane:

- The **Opportunity** area shows the number of Opportunities you have entered for this Contact and the Total value of these Opportunities. There is also a link to click on to display the Opportunities screen, with the contact filtered to view the Opportunities entered for this contact.
- The **Activity** area shows a list of Activities entered for this Contact with the Description, Date and Time Entered. There is also a link to click on to display the Activities screen with the contact filtered, to view the Activities entered for this Contact.
- The Contact information area displays the Contact Name, Address and Phone and Fax numbers from the linked record. There is a link to click on that to open the Customer or Vendor Information view in detail, to display detailed information from the Customer or Vendor setup. There are links to go to the Orders View, Open Invoice View, Detail History View, Project View, and Work Order View.

Contact Task Pane



The **Order View**, **Open Invoice View**, **Detail History View**, **Project View** and **Work Order View** links on the task pane have different functions depending on whether the contact you're viewing is a Customer, a Vendor, or an Employee. Each of these links opens an Interactive View with information specific to the Contact you are viewing.

- If you are viewing the contact information for a customer, click **Order View** to open the Sales Order, Order View, **Open Invoice View** to open the Accounts Receivable, Open Invoice View, **Detail History View** to open the Accounts Receivable, Detail History View, the **Project View** to open the Project Costing, Project View or **Work Order View** to open the Service Director, Work Order View.
- If you are viewing the contact information for a vendor, click **Order View to** open the Purchase Order, Order View, **Open Invoice View** to open the Accounts Payable, Open Invoice View, or **Detail History View** to open the Accounts Payable, Detail History View. The Project View and Work Order View links are not active for vendors.
- If you are viewing the contact information for an employee, the only active areas are the Opportunities and Activities links.

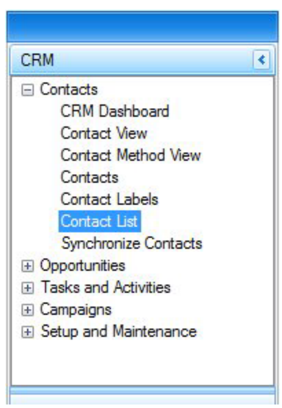
Producing a Contact List

Print the **Contact List** to view a list of the contact information you entered in the Setup and Maintenance **Contacts** function.

Follow these steps to print the **Contact List**:

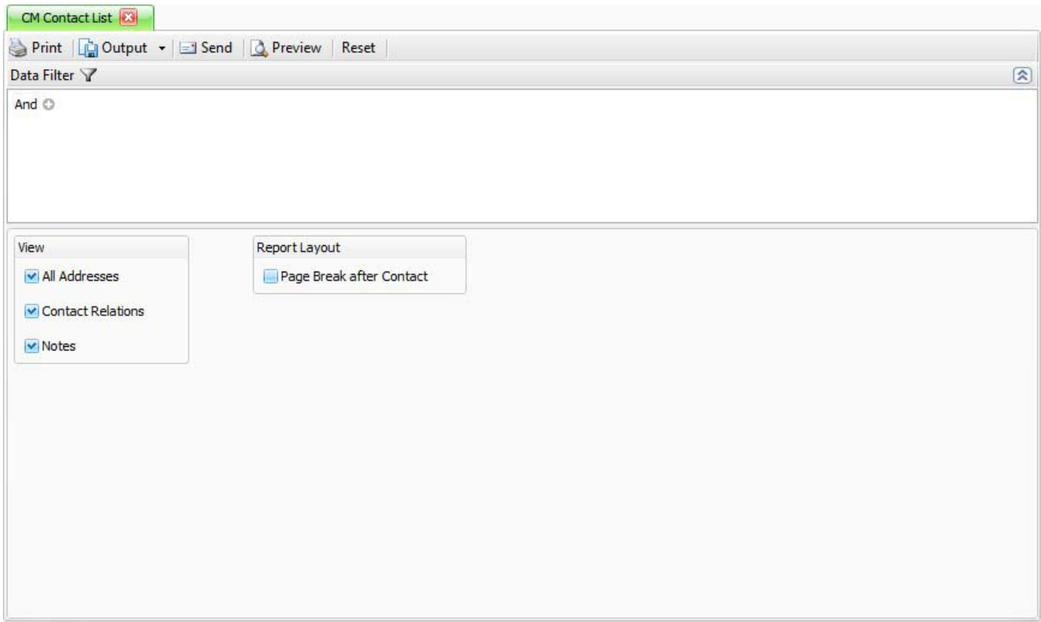
1. Select **Contact List** from the **Contacts** menu.

Contact List Menu



2. The **Contact List** screen appears.

Contact List Screen



3. Use the **Data Filter** area at the top of the screen to select the criteria to use to filter information that appears on the list. Only records matching the criteria you enter are printed. Leave this area blank to print all information.

NOTE: See the Reporting section in the General Information guide for more information on filtering and outputting reports.

4. Select the box to **View All Addresses** on the list. Clear the box to leave Not Allowed addresses off the list.
5. Select the box to **View Contact Relations** on the list. Clear the box to leave Members and Members Of values off the list.
6. Select the box to **View Notes** on the list. Clear the box to leave Notes off the list.
7. Select the box for the **Report Layout** to have a **Page Break after Contact**. Clear the box to continue the list without a page break for each Contact.

8. Select a command button:

Command Buttons

Name	Description
Reset	Set all fields to their defaults.
Preview	Preview the report on your monitor.
Output	Output the report as a .pdf file and save it.
Send	Email the report with the report attached as a .pdf file.
Print	Print the report.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Contact List

Sample Compwith CRM PAGE 1
Contact List

Report Filter	
View All Addresses	Yes
View Contact Relations	Yes
View Notes	Yes

Contact	Ace Computer Power Supply	Type	Individual
Title		Status	Active
First Name		Contact Status	Active
Middle Name		Link Type	Vendor
Last Name		Link ID	Ace001
		Report To	
Address			
Description		Notes	
Address 1	1437 Bellview Avenue		
Address 2			
City	Richfield		
Region	MN		
Country	USA		
Postal Code	55423		
Status	Allowed		

Other Addresses

Contact Methods

Contact Relations

Contact	Advanced Cirquit Boards Plus	Type	Individual
Title		Status	Active
First Name		Contact Status	Active
Middle Name		Link Type	Vendor
Last Name		Link ID	Adv008
		Report To	
Address			
Description		Notes	
Address 1	2 Rockford Parklawn Circle		
Address 2			
City	Edina		
Region	MN		
Country	USA		
Postal Code	55424		
Status	Allowed		

Other Addresses

Contact Methods

Contact Relations

5/30/2012 12:17 PM kenthe

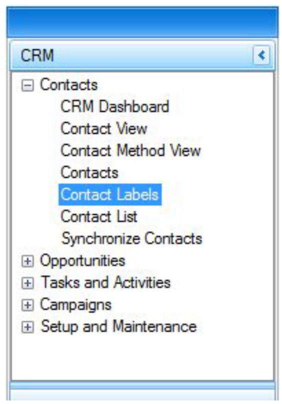
CONTACT LABELS

Use the **Contact Labels** function to print mailing labels for your Bulk Communications and Campaigns. After you produce the labels, CRM automatically adds an Activity record for the contacts you included to record that action.

Follow these steps to print contact labels:

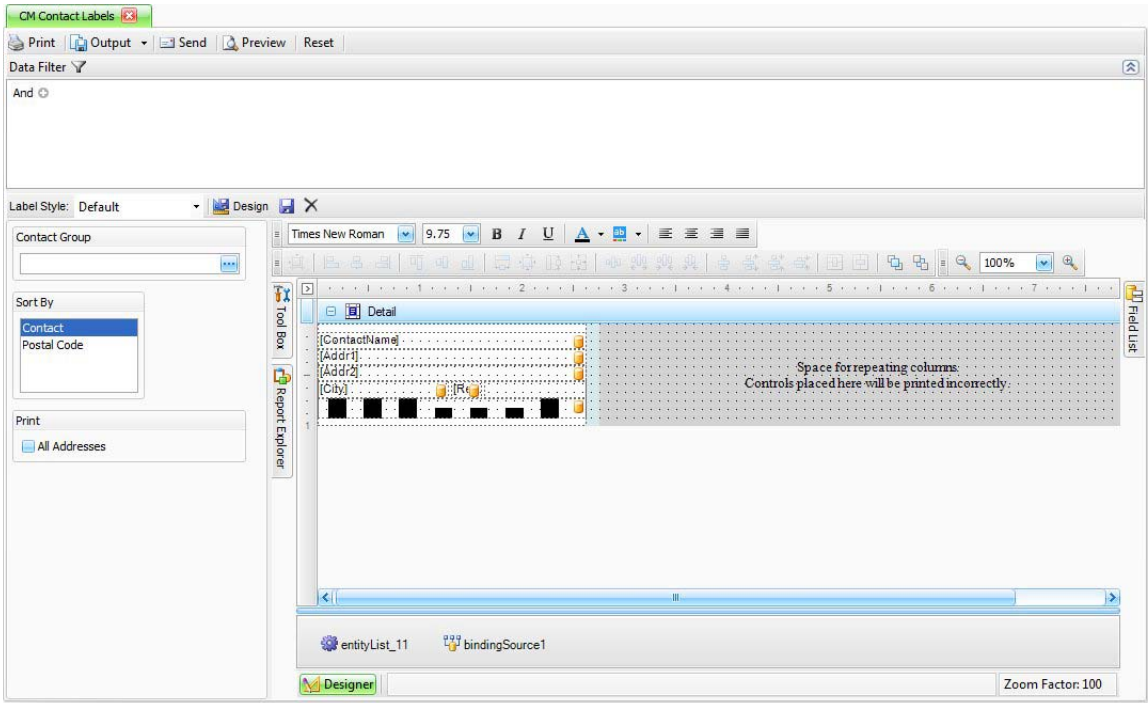
1. Select **Contact Labels** from the **Contacts** menu.

Contact Labels Menu



2. The **Contact Labels** screen appears.

Contact Labels Screen



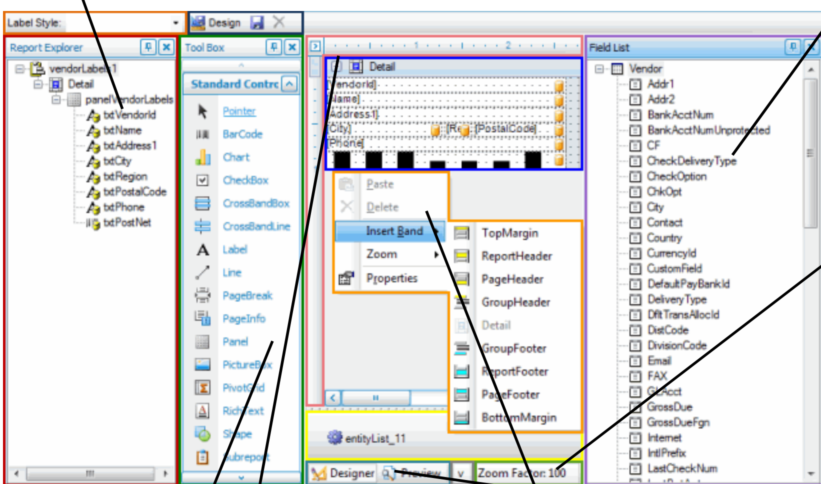
3. Click the **Design** button to view and edit the design of the label.

Report Explorer

Use this tab to navigate through elements of the label. You can use it when building a label to quickly access all of the elements of a label and their properties, and to see the whole label structure.

Field List

Use this tab to view the schema of the datasource which is currently bound to the label. Also, this tab may be used to bind existing label controls to data, or to create new bound label controls. To do this, simply click the desired field item in the Field List window and then drag and drop it onto the label or a bindable label control.



Zoom Panel

This section displays the current value of the zoom factor. To change the zoom factor at design time, use the corresponding buttons on the Context Menu.

View Tabs

Use the Designer and Preview buttons to quickly switch between the two types of views during the design of the label. This may be extremely useful when a report is fully customized at design time and it is required to populate its datasource and check its Print output.

Toolbox

Use this tab to add standard controls to the label. Simply drag and drop an item onto the label.

Context Menu

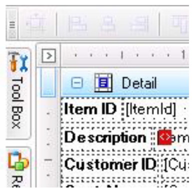
Use this menu after right-clicking any element in the label designer area. It provides you quick access to the most popular options, according to the current context.

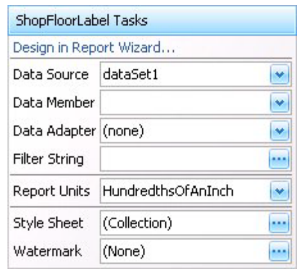
Band Strips, Expand/Collapse Buttons, and Editing

Use this section to

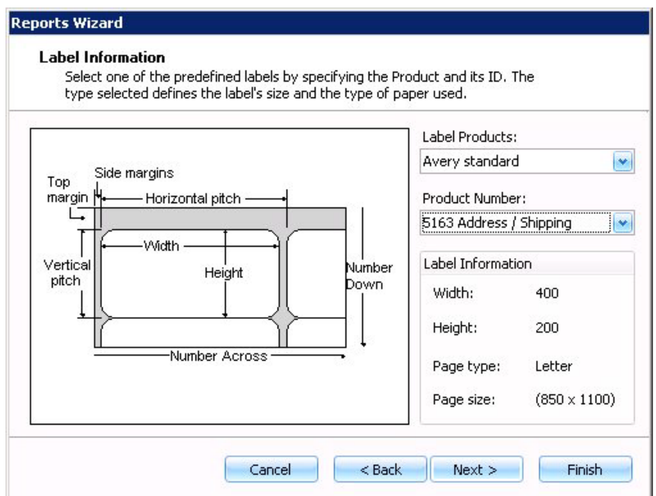
- See the band name, the band icon corresponding to its type, and the expand/collapse button.
- Expand/collapse a band strip by clicking the plus or minus sign adjacent to the band strip.

- Edit a label's field by double-clicking the field and editing the text as necessary. You can also right-click on the field and select Properties to edit additional properties of the field. Click the arrow button in the upper left corner of the label design to see the task menu.



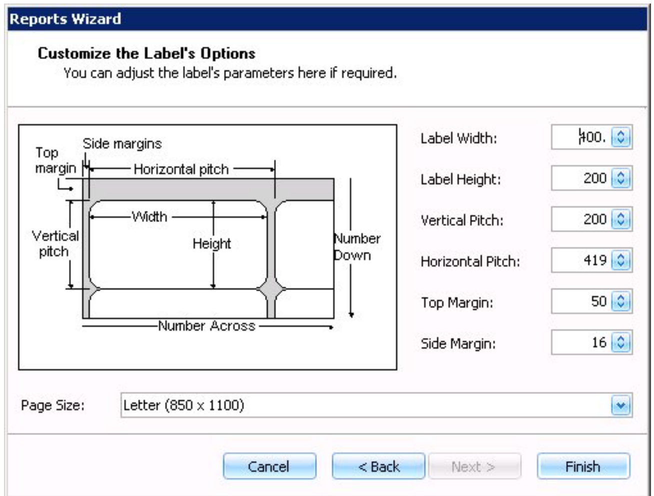


- Select **Design in Report Wizard** to use the design wizard to help design your label.



- Select the **Label Products** and **Product Number** you want to use to print labels.

- Click **Next** to move to the next screen.



- The **Label Width**, **Label Height**, **Vertical Pitch**, **Horizontal Pitch**, **Top Margin** and **Side Margin** are filled in from the defaults for the selected label product.
- Select the **Page Size** for the label being printed.
- Select **Finish** to save the label specifics you selected and return to the Print Labels screen.

Use the Contact Labels function to print 1 1/3 by 4 inch labels for mailings.

A POSTNET barcode, which is an extension of the 9-digit zip code used by the United States Postal Service, is printed on your labels if you chose that option using the Country Codes function of the System Manager Setup and Maintenance.

1. Use the Data Filter to select the range of filtering options or leave the filter blank to include all available data.
2. Select the sorting criterion from the Sort By section.
3. Check the box to include **All Addresses**, or leave the box unchecked to exclude the Not Allowed address information off the labels.

4. Select a command button:

Command Buttons

Name	Description
Reset	Set all fields to their defaults.
Preview	Preview the report on your monitor.
Output	Output the report as a .pdf file and save it.
Send	Email the report with the report attached as a .pdf file.
Print	Print the report.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Mailing Labels

Ace Computer Power Supply
1437 Bellview Avenue
Richfield MN 55423

Advanced Cirquit Boards Plus
2 Rockford Parklawn Circle
Edina MN 55424

All Peripherals Inc.
2001 West 30th Street
Minneapolis MN 55417

Altos Servers Company
945 Tuscon Drive
No. 3
Rollingstone MN 55969

ARG Systems Inc.
206 Lone Oak Road
International Falls MN 56649

Asynchronous Networking Tech.
960 Parker Street
Deerwood MN 56444

ATM Switches Inc.
6023 Howard Street
Suite 701
Gettysburg SD 57442

Axis Electronics
5102 Birch Street
Wheatland ND 58079

Beta Dynamics Inc.
507 Rochester Drive
Fond Du Lac WI 53500

Binary Marketing Solutions
164 Park Street North
Bismark ND 58501

Bitstream Technology
200 West 4th Street
Des Moines IA 50300

Bourne
501 N Hamilton Ave
Edina MN 55435

Burnhaven Software Design
8061 Kanpur Street
Minneapolis MN 55460

Celebris Systems
1209 Bramphur Street
Warren MI 48089

Cellucom Inc.
309 Oakton Street
Chicago IL 60661

Chronographic Testing Devices
605 Winston Avenue
Sioux Falls SD 57101

Commuciation Programming LTD.
207 Western Parkway
Fort Dodge IA 50501

Communicating PC's Inc.
955 Commercial Street
Suite 4
Rochester MN 55901

Compumarc
106 Orchard Garden
Suite 409
Cooperstown ND 58425

Computer Systems Inc.
75 North Industrial Road
Woodbury MN 55125

Consantek Networks
906 Indiana Drive
Rapid City SD 57701

Crowley Shoe Manufacturing
3749 Industrial Park Drive
Building 10A
Minneapolis MN 55487

Cyber Cirquit Distribution
1200 Lakeshore Drive
Suite 207
Chicago IL 60663

Cypress Multimedia
621 4th Avenue
Yale MI 48097

Datasorter Technology
861 Fort Carson Parkway
Belle Fourche SD 57717

Daylight Reality Corporation
261 North Hampshire BLVD
Minneapolis MN 55408

Digital CD-Rom Drives
8042 Schneider Way
Rochester MN 55901

Double
459 1st Avenue
Victoria MN 55344-8999

Electronet Inc.
7568 Newborne Drive
Fremont IA 52561

Envirocorp Software Systems
West Highway 269
Box 400
Woodbury MI 48849

SYNCHRONIZE CONTACTS

If you regularly link the Contact information you enter in CRM to existing Vendor, Customer, and Employee records stored in the TRAVERSE Accounts Payable, Accounts Receivable, and Payroll applications, use the **Synchronize Contact** function to copy the changes you've made to contact information to the linked record (and vice versa).

Use the Synchronize Contacts function to copy the changes you have made to Contact information in CRM to the linked record in Accounts Payable, Accounts Receivable, and Payroll applications, and vice versa.

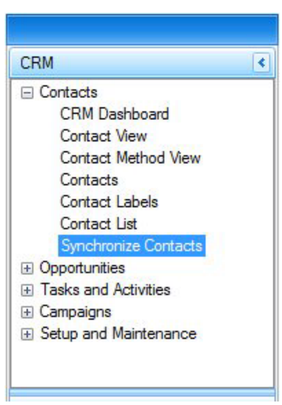
Be aware that if you deleted a record in Accounts Payable, Accounts Receivable, or Payroll, the associated Contact record in CRM (if any) will also be deleted if you update Contact records with changes from linked records. Linked records that have been deleted have blank IDs and addresses when listed on the Synchronize Contacts screen. To keep from deleting records in CRM, change the Update value to Skip when linked records have been deleted. Deleted linked records are not re-created when you synchronize contacts.

NOTE: Because of the sensitive nature of Employee information and due to auditing requirements, you cannot use this function to update linked Employee records with changes you have made to contact records in CRM. You can; however, update CRM contact records with any changes you have made to the linked Employee records. In other words, when the Link Type is Employee, you cannot update the link, you can only update the CRM Contact.

Follow these steps to **Synchronize Contact** and linked record information:

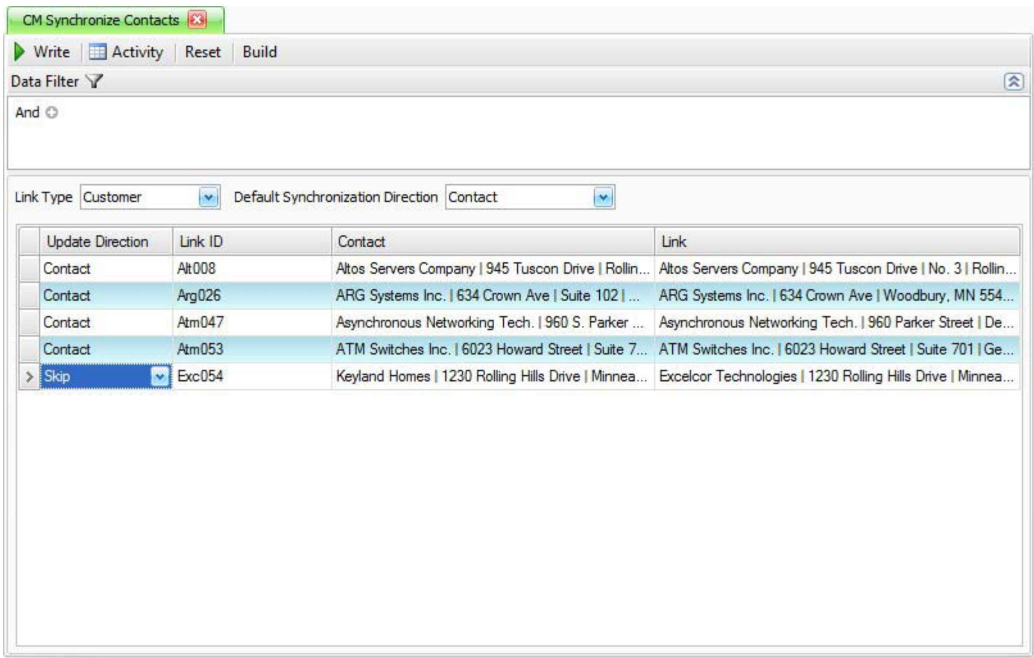
1. Select **Synchronize Contacts** from the **Contacts** menu.

Synchronize Contacts Menu



2. The **Synchronize Contacts** screen appears.

Synchronize Contacts Screen



3. Use the **Data Filter** to select the range of filtering options or leave the filter blank to include all available data.

4. Select whether to synchronize **Customer**, **Vendor**, or **Employee** contacts from the **Link Type** field.

5. Select the default record to update from the **Default Synchronization Direction** field:

   - Select **Contact** to copy changed information from the contact record to the linked record.

   - Select **Link** to copy changed information from the linked record to the contact record.

   - Select **Skip** to skip copying any information for that record set. Use this option to skip the copy process when both records contain many differences. You must then resolve these differences in both records manually.

6. Click the **Build** button, on the tool bar, to generate a list of contact and linked records that have differing information.

7. Edit, if necessary, the **Update Direction** in which information is copied for the selected contact and linked record using the **Update** field:

    - Select **Contact** to copy changed information from the linked record to the contact record.
    - Select **Link** to copy changed information from the contact record to the linked record.
    - Select **Skip** to skip copying any information for that record set. Use this option to skip the copy process when both records contain many differences. You must then resolve these differences in both records manually.

NOTE: You cannot change the address information listed here. To change address information, edit either the Contact or Linked record first, then use this function to copy your changes, if necessary. Blank link lines indicate the linked record has been deleted from TRAVERSE. To keep from deleting the associated CRM contact record as well, select Skip in the Update field.

8. Click a command button:

Command Buttons

Name	Description
Write	Copy the differing information form one record to another according to the Update value.
Activity	View the Activity Log of synchronized contacts.
Reset	Set all fields to their default values.
Build	Build a list of contacts that have had changes made to the contact or linked records.

Sample Contact Synchronization Log

Sample Comp with CRM
CM Synchronize Contacts

Page 1

Update Direction	Link ID	Contact	Link
Link	Alt008	Altos Servers Company | 945 Tuscon Drive | Rollingstone, MN	Altos Servers Company | 945 Tuscon Drive | No. 3 | Rollingstone, MN 559
Link	Arg026	ARG Systems Inc. | 634 Crown Ave | Suite 102 | Woodbury, MN	ARG Systems Inc. | 634 Crown Ave | Woodbury, MN 55428 | USA |
Link	Atm047	Asynchronous Networking Tech. | 960 S. Parker Street | Deerw	Asynchronous Networking Tech. | 960 Parker Street | Deerwood, MN 5644
Link	Atm053	ATM Switches Inc. | 6023 Howard Street | Suite 703 | Gettysbur	ATM Switches Inc. | 6023 Howard Street | Suite 701 | Gettysburg, SD 574
Skip	Exc054	Keyland Homes | 1230 Rolling Hills Drive | Minneapolis, MN 55	Excelcor Technologies | 1230 Rolling Hills Drive | Minneapolis, MN 55406 |

CRM DASHBOARD

Use the **CRM Dashboard** function to view recent Activity and Opportunities for your contacts.

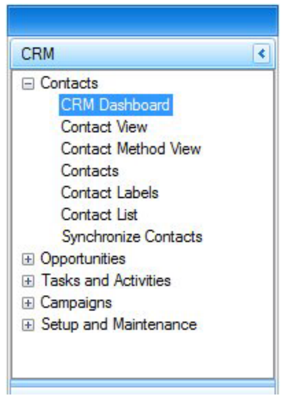
The dashboard is divided into multiple sections to view different functions and parts of the Contact setup.

- **Contact** - The contact area will show the basic information for the selected contact such as the **Type**, **Status**, **Contact Status**, **Title**, the full **Name** and **Address**.
- **Tasks** - The Tasks area shows a history of the Tasks set up and assigned to the Contact with the **Task Type**, **Description**, **Assigned To**, **Due Date**, **Status**, and **Priority** displayed. You can click on the blue **Tasks** link to go to the Tasks function and view, edit, or add Tasks for the selected Contact.
- **Contact Method** - The Contact Method area will display all the Contact Methods you entered into the Contact setup with the **Method**, **Value**, and **Status** displayed.
- **Activities** - The Activities area shows a history of Activities entered and assigned to the selected Contact with the **Activity Type**, **Description**, **Data/Time**, **Value**, **Duration**, and **Notes** displayed. You can click on the blue Activities link to go to the Activities function and view, edit, or add Activities for the selected Contact.
- **Opportunities** - The Opportunities area shows a history of Opportunities entered and assigned to the selected contact with the **Description**, **Status**, **Referred By**, **Target Date**, **Probability**, **Resolution**, and **Notes** displayed. You can click on the blue Opportunities link to go to the Opportunities function and view, edit, or add opportunities for the selected contact.

Follow these steps to work with the **CRM Dashboard**:

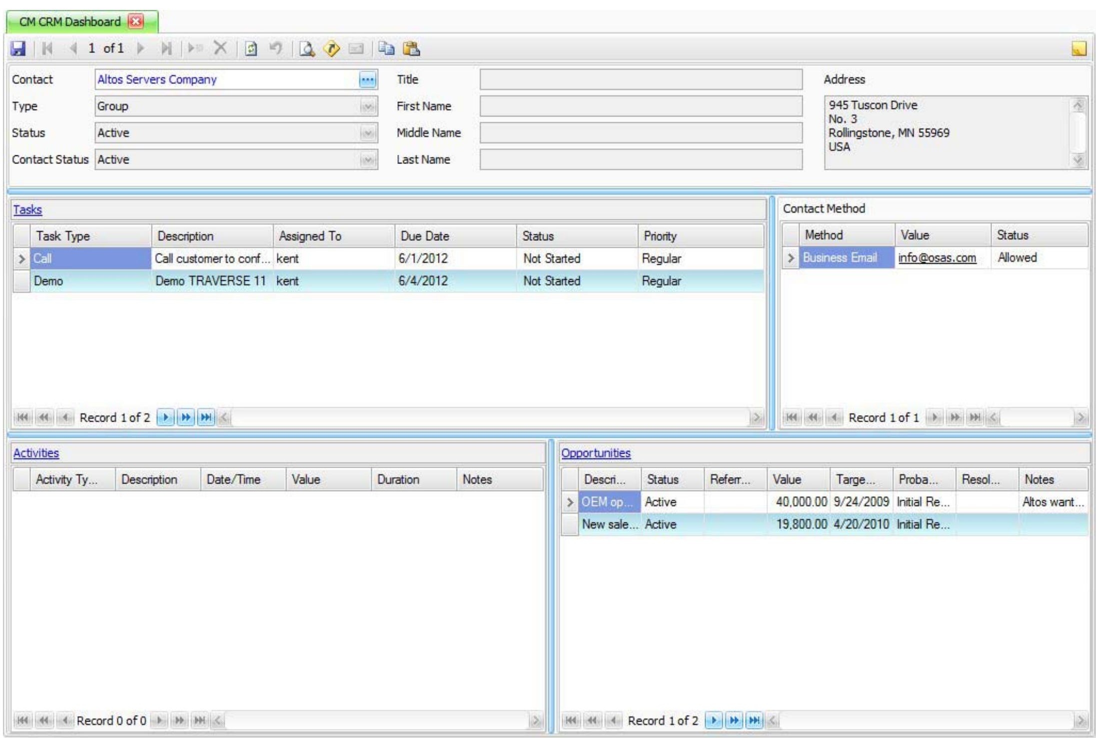
1. Select **CRM Dashboard** from the **Contacts** menu.

CRM Dashboard Menu



2. The **CRM Dashboard** screen appears.

CRM Dashboard Screen



3. Select a Contact for which you want to view Activity and Opportunities, from the **Contact** field.

   Double click on the blue **Contact** field to go to the Contacts setup screen if you want to view more details, or edit the Contact information.

4. View the available information.

5. Click the blue headings to access the applicable functions and make any necessary changes.

NOTE: See the corresponding section in this training manual for more details on editing and adding new Tasks, Activities and Opportunities.

USING INTERACTIVE VIEWS

With the views functions, you can view but not change the following Contact information:

- Contact information
- Contact Method information

Use these functions if you need to examine (but not change) a Contact record, an address, or Contact Method information.

Using Interactive Views you can easily and quickly build and manipulate tables to display information. After selecting from the available criteria to display as filter fields, data items, column fields, or row fields, you can highlight columns and rows to have the selected rows and columns display as a graph below the table. To include multiple rows or columns in the graph, you can use the CTRL+ click (to select multiple rows or columns) and SHIFT+ click (to select all rows or columns between the first and second click) shortcuts, after selecting the first row and column.

Sorting and Filtering

When you arrange the columns to your liking, you can sort, group, or filter the data by the column's contents. To sort and filter the data, right-click a column heading and use the functions outlined in the table below.

Button	Name	Select To
	Sort Ascending	Sort the selected column’s data in ascending order. **NOTE: You can also accomplish this task by clicking the column heading until appears.**
	Sort Descending	Sort the selected column’s data in descending order. **NOTE: You can also accomplish this task by clicking the column heading until appears.**
	Clear Sorting	Remove all sorting options and revert to the default view.

	**Group By This Column**	Group the identical entries from this column into a single group. **NOTE: If you group by column entry, you can right-click on the grouped column heading to select from the options outlined in this table, or choose Full Expand to expand all of the grouped entries, Full Collapse to collapse all of the grouped entries, or UnGroup to undo the grouped entry.**
	**Column Chooser**	Open the Customization window. With the Customization window open, you can click and drag columns to the window to remove them from the screen or click and drag columns from the window to place them back onto the screen. **NOTE: You can also remove a column from the form by clicking on the heading of the column and dragging it to the bottom of the screen and releasing it when your cursor changes to an *X*.**
	**Best Fit**	Adjust the selected column to resize the column for the best view of that column's data.
	**Clear Filter**	Remove all filter options and revert to the default view.
	**Filter Editor**	See "Filtering Across All Columns" in the General Information guide for more information.
	Best Fit (all columns)	Adjust all columns to resize for the best view all of the data at once.

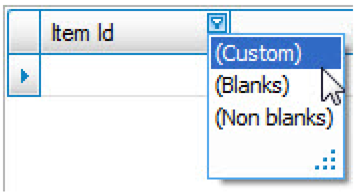
Filtering by an Individual Column

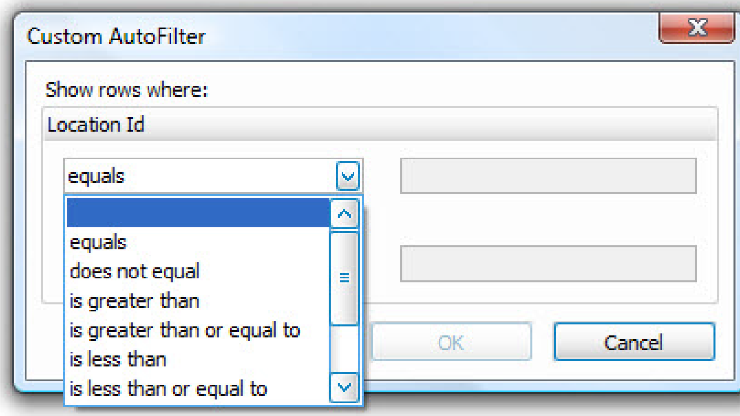
To create a filter for a single column, click the funnel icon that appears once you place the cursor in the associated column and then select a filter option from the drop down menu.

Select	To
(Custom)	Enter criteria for filtering the selected column. **NOTE: View the following paragraph for additional information.**
(Blanks)	Display only entries with blank information in the selected column.
(Non blanks)	Display only entries with information in the selected column.

From the drop down menu, you can also select from the entries in the selected column to group the column by the selected entry.

If you select (**Custom**), the Custom AutoFilter function appears. Select up to two filtering criteria for the selected column from the drop down menus, then enter a string of text or numbers to complete the condition and click **OK**.





Sorting and Filtering Pivot Chart Data

Right-click on the pivot table gray area or a field button when in Pivot Chart View for each application, to use the following functions:

Select	To
	Refresh the data in the tables.
	Remove the selected criterion from the table.
	Move the selected criterion to the beginning, left, right, or end of the list of criteria.
	Open the PivotGrid Field List, then click and drag the applicable fields to the desired locations.

Select	To
	Close the PivotGrid Field List.

NOTE: Note: See instructions in the "Filtering Across All Columns" in the General Information guide section for more information on filtering.

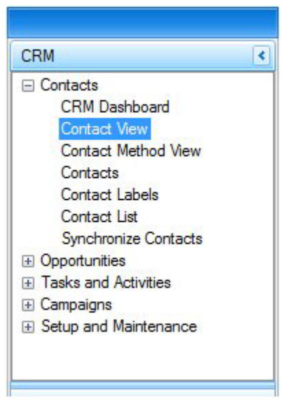
CONTACT VIEW

Use the **Contact View** function to view information about a contact. You can design the view with a variety of columns, filtering, and grouping, and save the views by name to recall at a later date.

To use the **Contact View**, follow these steps:

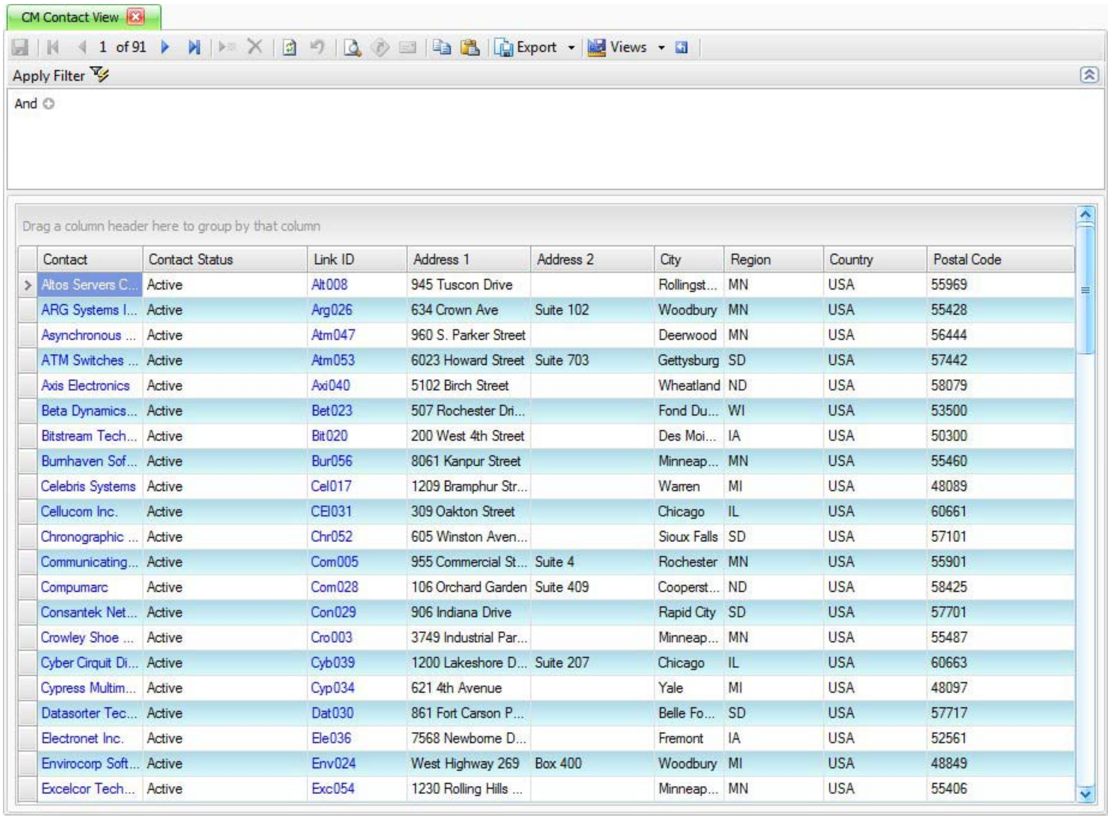
1. Select **Contact View** from the **Contacts** menu.

Contact View Menu



2. The **Contact View** screen appears.

Contact View Screen



Contact	Contact Status	Link ID	Address 1	Address 2	City	Region	Country	Postal Code
Altos Servers C...	Active	Alt008	945 Tuscon Drive		Rollingst...	MN	USA	55969
ARG Systems I...	Active	Arg026	634 Crown Ave	Suite 102	Woodbury	MN	USA	55428
Asynchronous ...	Active	Atm047	960 S. Parker Street		Deerwood	MN	USA	56444
ATM Switches ...	Active	Atm053	6023 Howard Street	Suite 703	Gettysburg	SD	USA	57442
Axis Electronics	Active	Axi040	5102 Birch Street		Wheatland	ND	USA	58079
Beta Dynamics...	Active	Bet023	507 Rochester Dri...		Fond Du...	WI	USA	53500
Bitstream Tech...	Active	Bit020	200 West 4th Street		Des Moi...	IA	USA	50300
Burnhaven Sof...	Active	Bur056	8061 Kanpur Street		Minneap...	MN	USA	55460
Celebris Systems	Active	Cel017	1209 Bramphur Str...		Warren	MI	USA	48089
Cellucom Inc.	Active	CEl031	309 Oakton Street		Chicago	IL	USA	60661
Chronographic ...	Active	Chr052	605 Winston Aven...		Sioux Falls	SD	USA	57101
Communicating...	Active	Com005	955 Commercial St...	Suite 4	Rochester	MN	USA	55901
Compumarc	Active	Com028	106 Orchard Garden	Suite 409	Cooperst...	ND	USA	58425
Consantek Net...	Active	Con029	906 Indiana Drive		Rapid City	SD	USA	57701
Crowley Shoe ...	Active	Cro003	3749 Industrial Par...		Minneap...	MN	USA	55487
Cyber Cirquit Di...	Active	Cyb039	1200 Lakeshore D...	Suite 207	Chicago	IL	USA	60663
Cypress Multim...	Active	Cyp034	621 4th Avenue		Yale	MI	USA	48097
Datasorter Tec...	Active	Dat030	861 Fort Carson P...		Belle Fo...	SD	USA	57717
Electronet Inc.	Active	Ele036	7568 Newborne D...		Fremont	IA	USA	52561
Envirocorp Soft...	Active	Env024	West Highway 269	Box 400	Woodbury	MI	USA	48849
Excelcor Tech...	Active	Exc054	1230 Rolling Hills ...		Minneap...	MN	USA	55406

3. Double click on the blue **Contact** field to drill down to go to the Contacts function.

4. Double click on the blue **Link ID** field to drill down to go to the linked record's detail view.

NOTE: You must have menu permissions to the linking function to view the detailed information on Customers, Vendors and Employees.

5. Refer to the **Using Interactive Views** section in this chapter (page 5-35) for more details on using the Contact View.

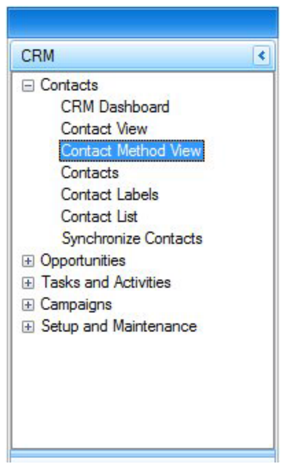
CONTACT METHOD VIEW

Use the **Contact Method View** function to view information on Contact Methods. You can design the view with a variety of columns, filtering, and grouping, and save the views by name to recall at a later date.

To use the **Contact Method View**, follow these steps:

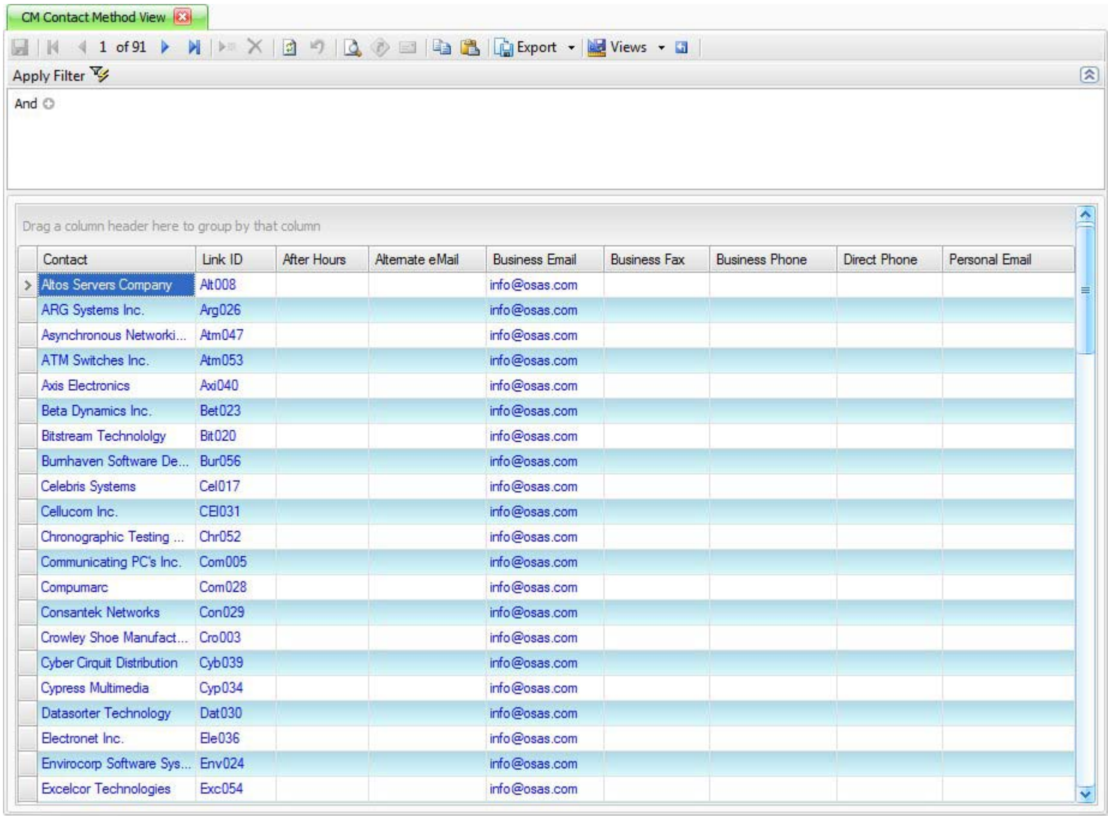
1. Select **Contact Method View** from the **Contacts** menu.

Contact Method View Menu



2. The **Contact Method View** screen appears.

Contact Method View Screen



3. Double click on the blue **Contact** field to drill down to go to the Contacts function.

4. Double click on the blue **Link ID** field to drill down to go to the linked record's detail view.

NOTE: You must have menu permissions to the linking function to view the detailed information on Customers, Vendors and Employees.

5. Double click on the blue email address, if you have one set up, to send an email to the contact to the selected email address.

6. Double click on the blue internet address, if you have one set up, to open the URL address in the field.

Refer to the **Using Interactive Views** section in this chapter (page 5-35) for more details on using the Contact Method View.

6

OPPORTUNITIES

OVERVIEW

Use the Opportunities menu to enter and track Opportunities you have with your Contacts. The Opportunities menu also includes reports to project what your chances of completing the Opportunities with your Contacts, a worksheet that lists the details on the Opportunities you have entered for your Contacts and has space to write in notes about the Opportunity and a report that lists the details of the Opportunities entered for your Contacts with options to sort your report using different criteria.

Opportunities

Opportunities represent the potential to do more business with a Contact to further your relationship. When you enter an Opportunity for a client, you can also indicate how likely it is that the Opportunity will be successful. Use the Opportunities function to enter and view the Opportunities associated with a Contact. (page 6-5)

Opportunity Projections

Use the **Opportunity Projections** function to view projected information about Opportunities. (page 6-9)

Opportunity Worksheet

Print the **Opportunity Worksheet** to view a list of all Opportunities recorded for Contacts. This worksheet helps you view the entire business relationship with Contacts and can help you analyze that relationship: what Opportunities resulted from which Campaigns, how often Opportunities are successful with various Contacts, or how strong your business relationship is with a Contact. (page 6-11)

Opportunity Report

Print the **Opportunity Report** to view a list of all Opportunities, organized by status. This report helps you identify the Opportunities you need to work on and the Contacts you need to work with to close those Opportunities. The report also lists the value of Opportunities, helping you determine which are most important. (page 6-15)

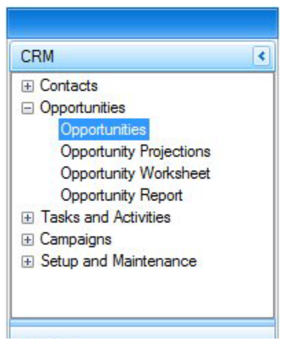
OPPORTUNITIES

Opportunities record Contact prospects. Each Opportunity represents one possibility to extend your business relationship with a Contact; taken together, Opportunities can help record your sales history with a Contact. Examples of Opportunities include interest in products (for sales), subscription or service contract renewals (for service or support industries), or new reseller or partnership agreements (for a business as a whole).

Follow these steps to work with **Opportunities**:

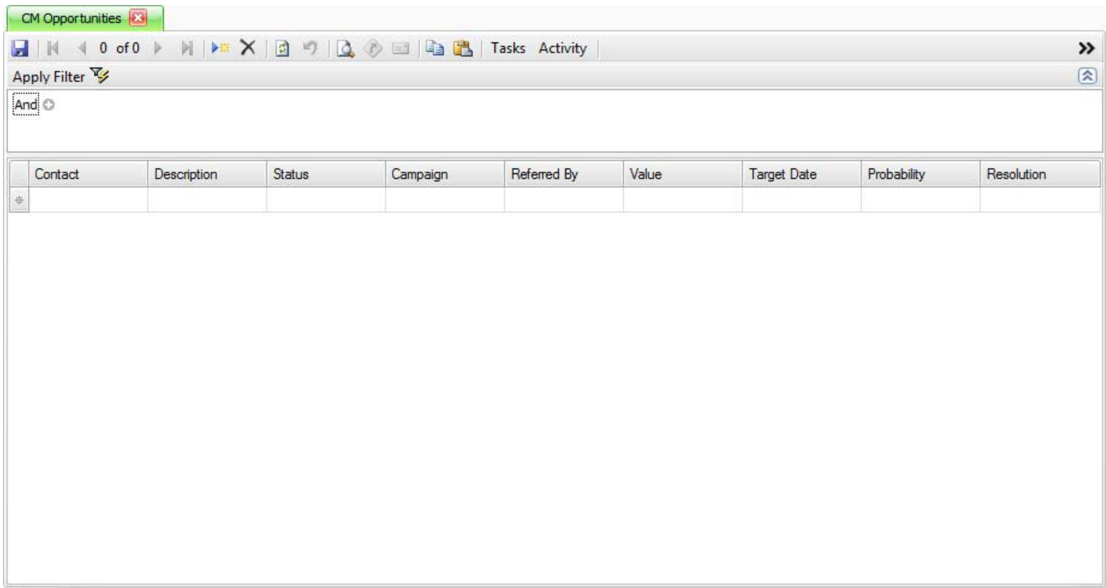
1. Select **Opportunities** from the **Daily Work** menu.

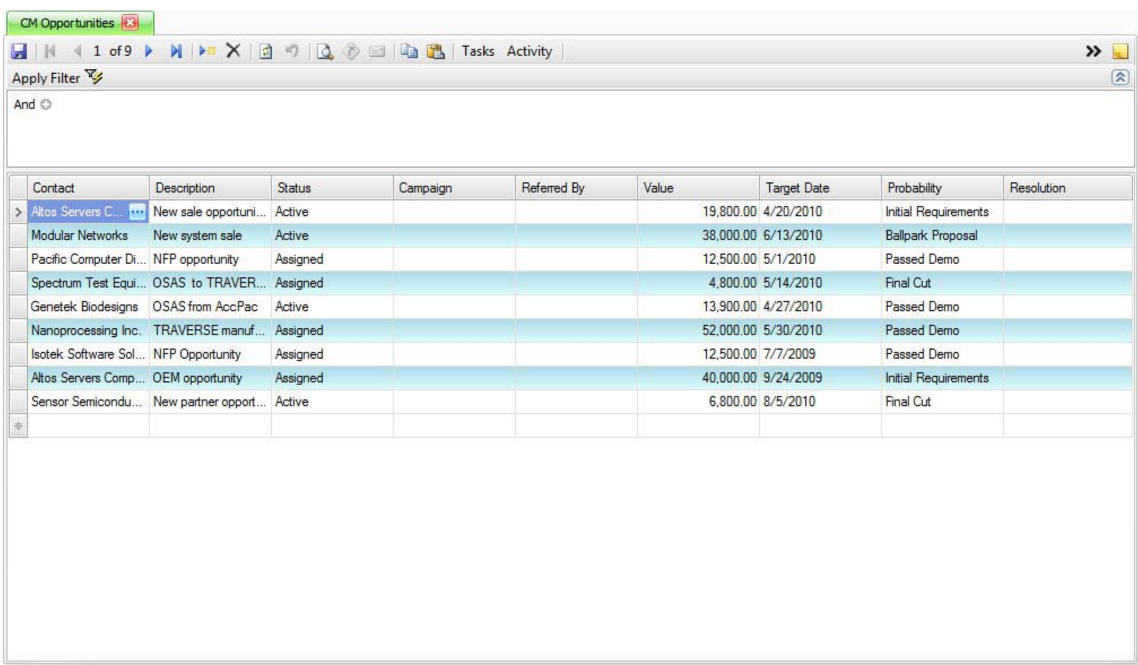
Opportunities Menu



2. A blank **Opportunities** screen appears.

Opportunities Screen



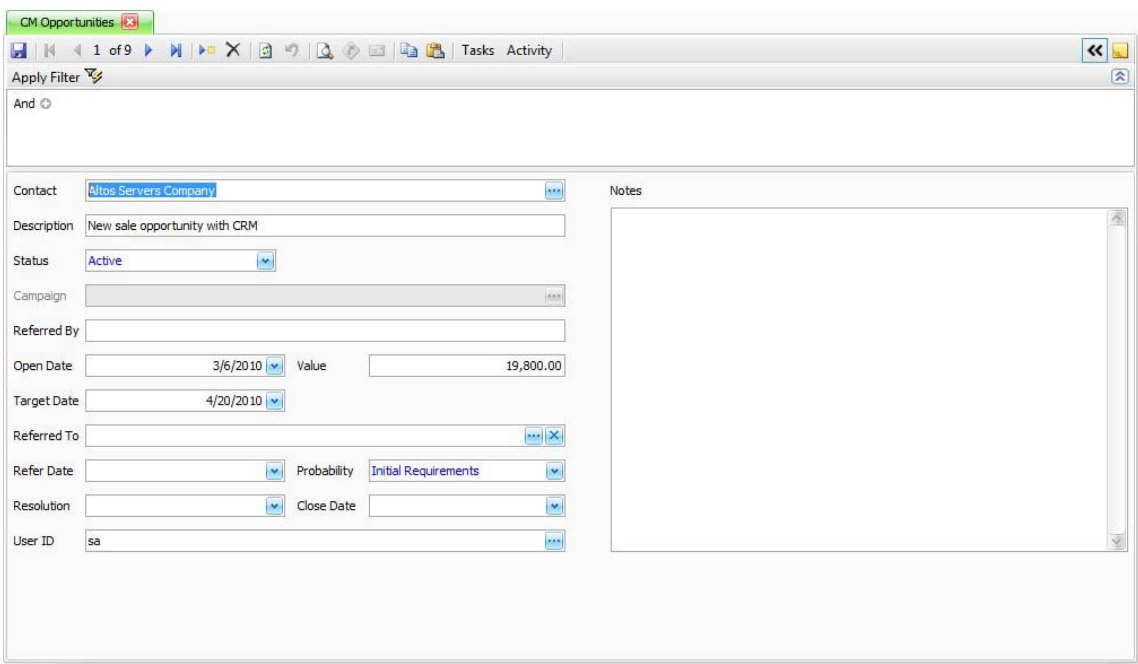


Maint

3. Select the **Contact Name** for which you want to add or edit Opportunity records.
4. To add a new Opportunity for the Contact you selected, enter information as prompted in the boxes on the **Opportunity** screen.

   To edit an existing Opportunity, enter your filter criteria and click the **Apply Filter** button and select the Opportunity you want to work with from the list.
5. The screen will display a list of Opportunities you have selected in the current session of the Opportunities function.
6. To find an Opportunity that you have not selected in this session use the filter area to select a field to filter by, or use the column filtering to filter on any column displayed. For more information on the filter functions see the Filter Box section in the General Information guide.

Opportunities Screen Detail



7. Click the double arrow button to view the detailed Opportunities screen.
8. Enter the information to record the details of your Opportunity with the Contact.
9. Select or enter the **Contact**.
10. Enter a **Description** of the opportunity.
11. Select the **Status** of the opportunity from the list you generated in the Opportunity Codes function (page 4-37).
12. Select the **Campaign** (page 8-5) this Opportunity resulted from if applicable.
13. Enter who this prospect or opportunity was **Referred By**.
14. Enter the **Open Date** for the date you initially entered this Opportunity.
15. Enter the potential **Value** of the Opportunity. This will be used in the Opportunity Projections Report (page 6-9).
16. Enter the **Target Date** for closing this Opportunity.
17. Enter the Contact the Opportunity has been **Referred To**, if you are referring the Opportunity to a Contact.
18. Enter the **Refer Date** as the date you referred the Opportunity to the Contact.
19. Enter or select the **Probability** for the Opportunity, from the Probability Codes you entered into the Opportunity Codes function (page 4-37).
20. Enter or select the **Resolution** to the Opportunity, once you have closed the Opportunity, from the list you entered into the Opportunity Codes function (page 4-37).
21. Enter the **Close Date** as the date you closed or completed the Opportunity.
22. Enter or select the **User Id** that entered the Opportunity.
23. Enter any additional **Notes** you want to record about the Opportunity. Press **Ctrl+Enter** to begin a new line.
24. Select the **Save** button to save your changes.

OPPORTUNITY PROJECTIONS

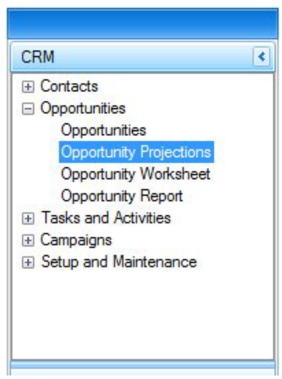
Use the **Opportunity Projections** function to view projected information about Opportunities.

The Opportunity Projections is a pivot table and pivot chart interactive view. The screen has 3 areas, a filtering area to select and enter server filter information, a pivot table like section for arranging your data in the format you would like to view it in, and a graph which will show the data you have highlighted in the pivot area in a graphical format. You may change the graph style.

To use **Opportunity Projections**, follow these steps:

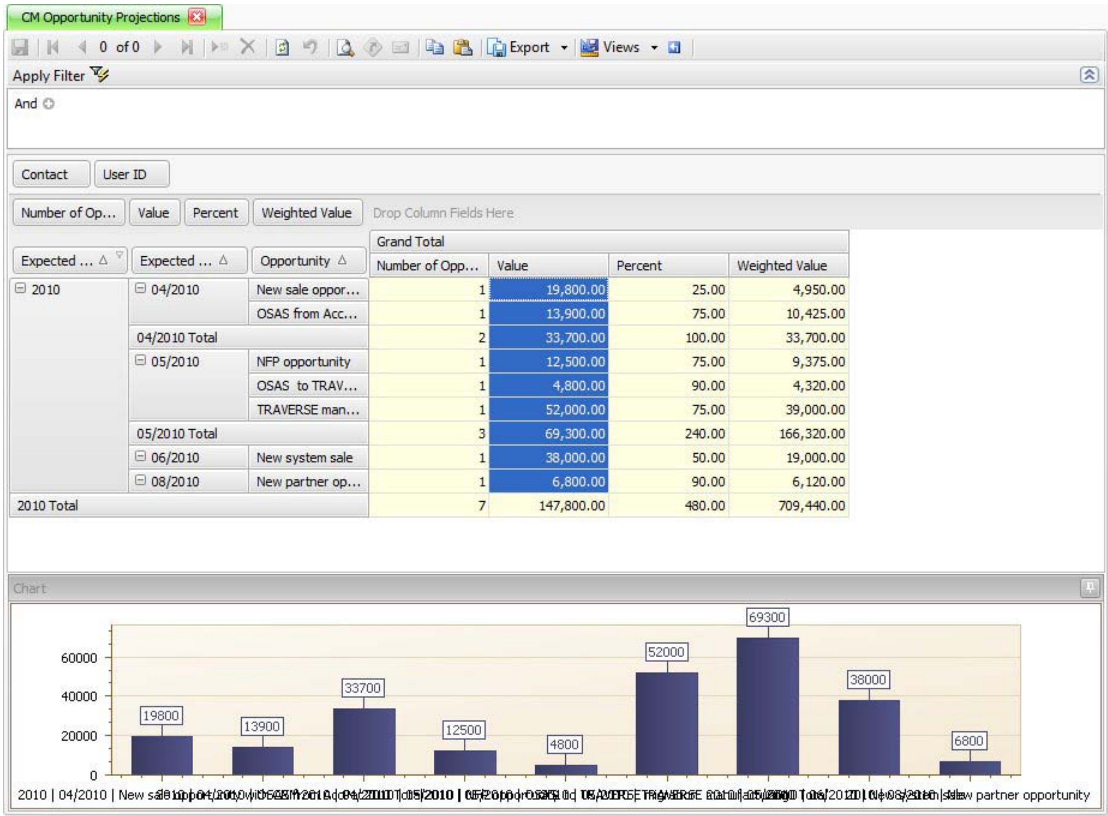
1. Select **Opportunity Projections** from the **Opportunities** menu.

Opportunity Projections Menu



2. The **Opportunity Projections** screen appears.

Opportunity Projections Screen



3. Refer to the **Using the Interactive Views Menu** section (page 5-35) for more details on using the Opportunity Projections.

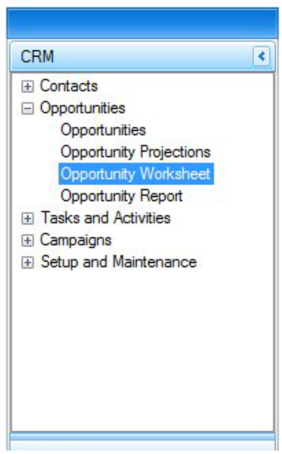
OPPORTUNITY WORKSHEET

Print the **Opportunity Worksheet** to view a list of all Opportunities recorded for Contacts. This worksheet helps you view the entire business relationship with Contacts and can help you analyze that relationship: what Opportunities resulted from which Campaigns (page 8-5), how often Opportunities are successful with various Contacts, or how strong your business relationship is with a Contact.

Follow these steps to print the **Opportunity Worksheet**:

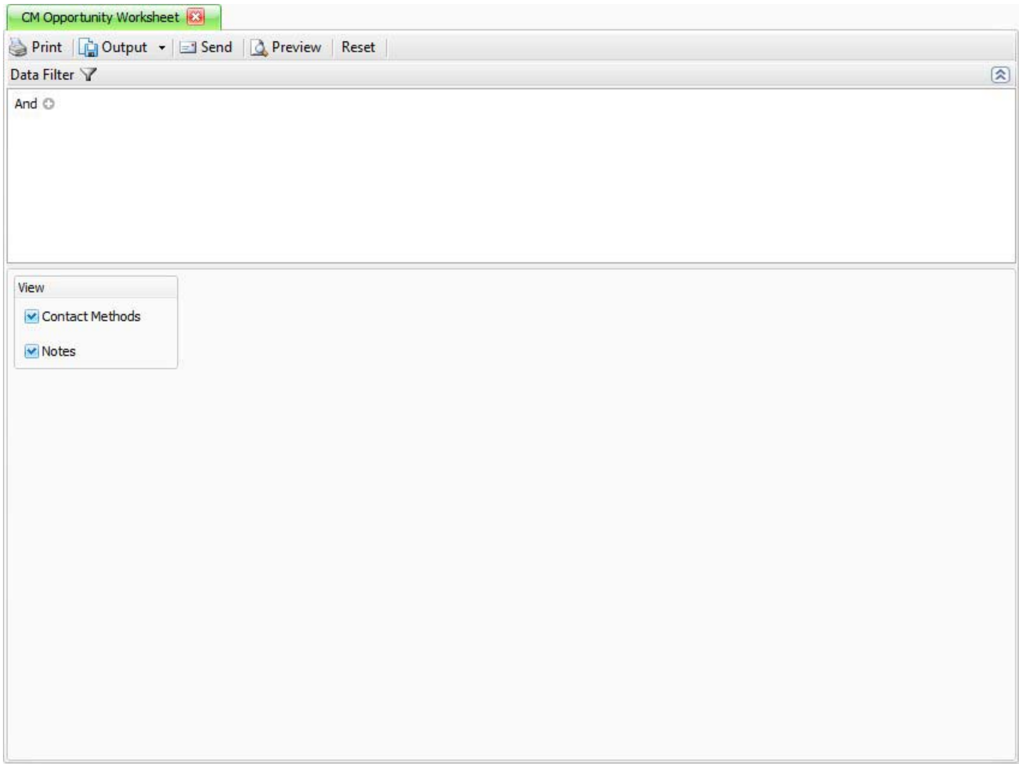
1. Select **Opportunity Worksheet** from the **Opportunities** menu.

Opportunity Worksheet Menu



2. The **Opportunity Worksheet** screen appears

Opportunity Worksheet Screen



3. Use the **Data Filter** area at the top of the screen to select the criteria to use to filter information that appears on the list. Only records matching the criteria you enter are printed. Leave this area blank to print all information. See the Reporting section in the General Information guide for more information on filtering and outputting reports.

   Only records that match the criteria you enter here are printed on the report.

   The system saves the last selection criteria you enter for use the next time you print that report.

4. Select the box to **View Contact Methods** on the report. Clear the box to exclude **Contact Methods** from the report.

5. Select the box to **View Notes** on the report. Clear the box to exclude **Notes** from the report.

6. Select a command button:

Command Buttons

Name	Description
Reset	Set all fields to their defaults.
Preview	Preview the report on your monitor.
Output	Output the report as a .pdf file and save it.
Send	Email the report with the report attached as a .pdf file.
Print	Print the report.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Opportunity Worksheet

Sample Comp with CRM
Opportunity Worksheet

PAGE 1

Report Filter
View Contact Methods Yes **View Notes** Yes

Contact / Open Date	Refer Date / Target Date	Description / Referred To / Notes	Address / Status	Close Date	Probability	Contact Methods / Campaign	Resolution	Referred By	Value
Altos Servers Company			945 Tuscon Drive No. 3 Rollingstone, MN 55969						
3/6/2010	4/20/2010	New sale opportunity with CRM	Active		Initial Requirements				19,800.00
3/7/2010	9/24/2009	OEM opportunity Altos wants to private label the OSAS product line starting with v7.0.	Assigned		Initial Requirements				40,000.00
Genetek Biodesigns			4 Technology Park Road Suite 27 Minneapolis, MN 55407						
3/7/2010	4/27/2010	OSAS from AccPac	Active		Passed Demo				13,900.00
Isotek Software Solutions			466 Lone Oak Road St. Paul, MN 55155						
3/7/2010	7/7/2009	NFP Opportunity	Assigned		Passed Demo				12,500.00
Modular Networks			50 Charleston Drive Number 607 Decatur, IL 62521						
3/7/2010	6/13/2010	New system sale	Active		Ballpark Proposal				38,000.00
Nanoprocessing Inc.			100 Mustard Street Sioux Falls, SD 57101						
3/7/2010	5/30/2010	TRAVERSE manufacturing	Assigned		Passed Demo				52,000.00

5/30/2012 12:31 PM **kenthe**

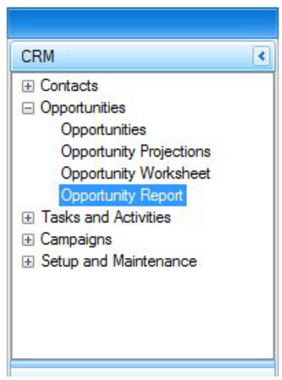
OPPORTUNITY REPORT

Print the **Opportunity Report** to view a list of all Opportunities, organized by Status. This report helps you identify the Opportunities you need to work on and the Contacts you need to work with to close those Opportunities. The report also lists the value of Opportunities, helping you determine which are most important.

Follow these steps to print the **Opportunity Report**:

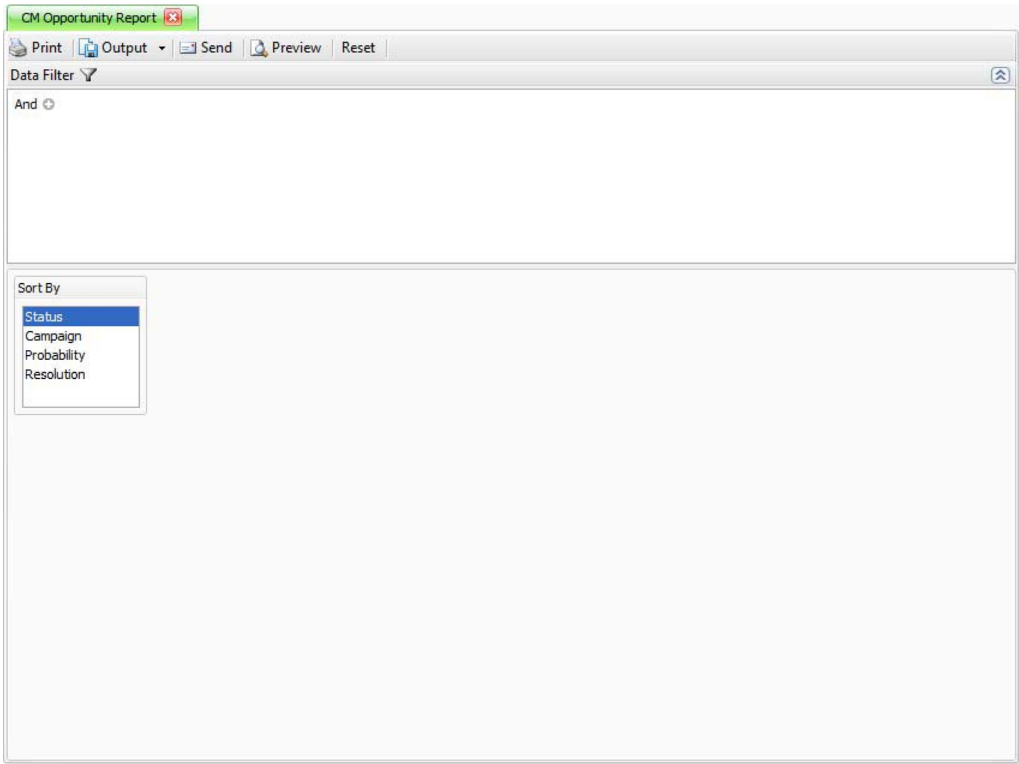
1. Select **Opportunity Report** from the **Opportunities** menu.

Opportunity Report Menu



2. The **Opportunity Report** screen appears.

Opportunity Report Screen



3. Use the **Data Filter** area at the top of the screen to select the criteria to use to filter information that appears on the list. Only records matching the criteria you enter are printed. Leave this area blank to print all information. See the Reporting section in the General Information guide for more information on filtering and outputting reports.

    Only records that match the criteria you enter here are printed on the report.

    The system saves the last selection criteria you enter for use the next time you print that report.

4. Select the **Sort By** criteria: **Status, Campaign, Probability** or **Resolution.**

5. Select a command button:

Command Buttons

Name	Description
Reset	Set all fields to their defaults.
Preview	Preview the report on your monitor.
Output	Output the report as a .pdf file and save it.
Send	Email the report with the report attached as a .pdf file.
Print	Print the report.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Opportunity Report

Sample Comp with CRM
Opportunity Report
Sorted by Status

PAGE 1

Report Filter

Description	Open Date / Close Date	Contact / Probability	Status / Resolution	Campaign	Count	Value
Active						
New sale opportunity with CRM	3/6/2010	Altos Servers Company / Initial Requirements	Active			19,800.00
New system sale	3/7/2010	Modular Networks / Ballpark Proposal	Active			38,000.00
OSAS from AccPac	3/7/2010	Genetek Biodesigns / Passed Demo	Active			13,900.00
New partner opportunity	3/7/2010	Sensor Semiconductor / Final Cut	Active			6,800.00
				Active Subtotal	4	78,500.00
Assigned						
NFP opportunity	3/7/2010	Pacific Computer Distribution / Passed Demo	Assigned			12,500.00
OSAS to TRAVERSE migration	3/7/2010	Spectrum Test Equipment / Final Cut	Assigned			4,800.00
TRAVERSE manufacturing	3/7/2010	Nanoprocessing Inc. / Passed Demo	Assigned			52,000.00
NFP Opportunity	3/7/2010	Isotek Software Solutions / Passed Demo	Assigned			12,500.00
OEM opportunity	3/7/2010	Altos Servers Company / Initial Requirements	Assigned			40,000.00
				Assigned Subtotal	5	121,800.00
Grand Total					9	200,300.00

*** End of Report ***

5/30/2012 12:33 PM

kenthe

7

Tasks and Activities

OVERVIEW

Use the **Tasks and Activities** menu to enter and list Tasks you want your employees or co-workers to perform either for a Contact or just to assign day to day Tasks to be completed. You also will use this menu to record Activities that you have done for your Contacts and list those Activities on reports.

Tasks

Tasks record the things you (or your employees) need to do to further communication with a Contact. These tasks may be directly Contact-related ("call Joe in response to issue #342," for example), or they may be related to a Campaign (page 8-5) or Bulk Communication (page 8-27) that is only tangentially related to contacts ("write up the renewal form letter," for example). Because Tasks focus on what needs to be done, you can assign them to users for completion and enter a Due Date. Use the Tasks function to view and enter Tasks. (page 7-5)

Task List

Print the Task List to view the status of Tasks you have entered and assigned to employees. You can view this list for specific statuses (**All**, **Pending**, **Completed**, or **Expired**) or for different user Types (**Assigned To**, **Entered By**, or **Completed By**) to see which Tasks are completed and who is entering and completing them. (page 7-9)

Activities

Activities record all the actions you've taken on behalf of a Contact. That is, when you view a Contact's Activities, you view a complete history of your relationship with that Contact. Because Activities are contact-related, they have no duration, expiration date, or follow up assigned to them. They are merely informative records that show what was done. Use the **Activities** function to enter and view a Contact's Activities. (page 7-25)

Activity Report

Print the Activity Report to view a list of all Activities recorded for Contacts. This report helps you view the entire history for Contacts to analyze their trends: whether they like a lot of contact, how often they contact you and for what reasons, or how good your relationship is with them. (page 7-29)

Contact Activity Report

Use the Contact Activity Report to view a list of activities recorded for your specified contacts. This report helps you view the history for your contacts to analyze their trends: whether they like a lot of contact, how often they contact you and for what reasons, or how good your relationship is with them. (page 7-33)

TASKS

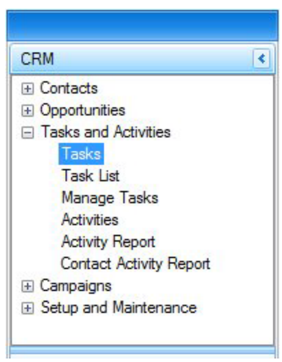
While Activities record what has been done for a contact, **Tasks** record the things that you or your employees need to do in order to further communication with a Contact. Instead of being associated with a Contact, Tasks are associated with your employees, the Users of CRM. Tasks are assigned to employees for completion and can carry expiration or Due Dates.

Use the **Tasks** function to view Tasks and Responses by Status (Pending, Completed, or Expired) or by user Type (Assigned To, Completed By, or Entered By). You can also use this function to enter new Tasks, but use caution: the new Task you enter is automatically associated with the Contact, Activity, or Campaign of the last Task detail you viewed. To ensure that Tasks are associated with the correct records, you may find it preferable to add tasks only via the **Tasks** button on the Contact, Activity, or Campaign screens.

Follow these steps to work with **Tasks**:

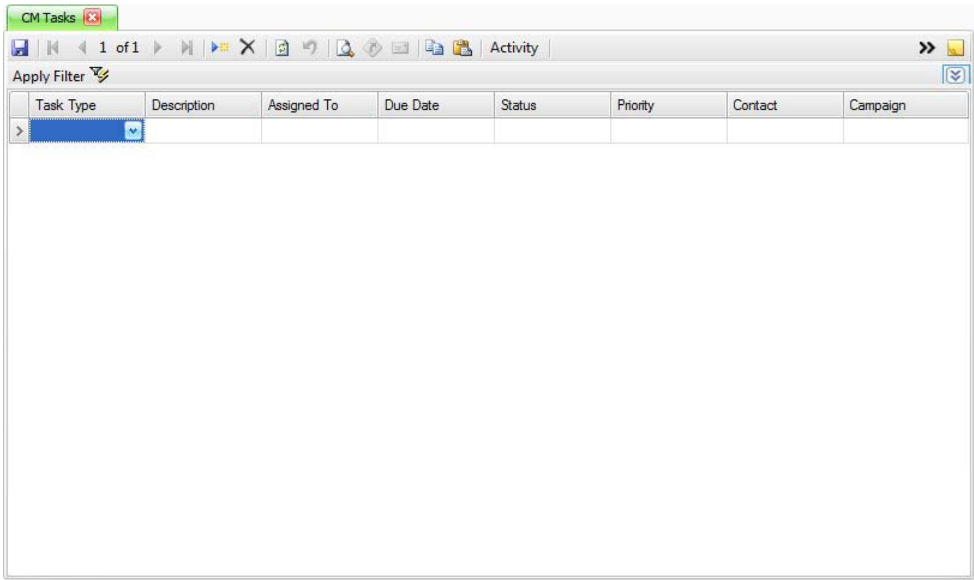
1. Select **Tasks** from the **Tasks and Activities** menu.

Tasks Menu



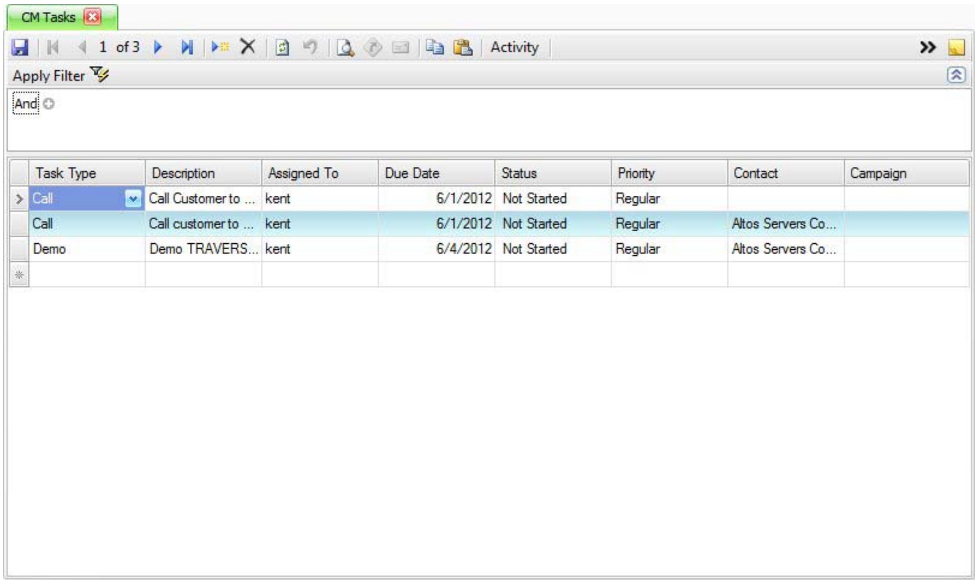
2. A blank **Tasks** screen appears.

Tasks Screen Blank



3. Use the filter area at the top of the screen to select the fields to filter by, such as Status or user type for which to view Tasks, then click **Apply Filter** to list the Tasks corresponding to your selection(s).

Tasks Screen Filled



4. The **Status** column shows the task's Status: **Not Started**, **In Progress**, **Completed**, **Waiting on someone else**, or **Deferred**.

   To complete a task, select **Completed** from the list. CRM automatically enters the workstation date as the task's Completed Date and moves the task from the list of Pending tasks to the list of Completed tasks.

   To reopen a Completed task, select a different Status. CRM automatically deletes the Completed Date and moves the task from the Completed list to the Pending list.

5. To quickly edit task information, select the task to edit the information you need to edit.

   Select the task's Status, then edit the task's **Action Date** and the user it has been Assigned To, if necessary. Click **Save** to save your changes and return to the Tasks screen.

6. Click the headings to sort the list of tasks by that heading.

7. To view tasks for a different Status or user Type, use the filter area at the top of the screen, then click **Apply Filter**.

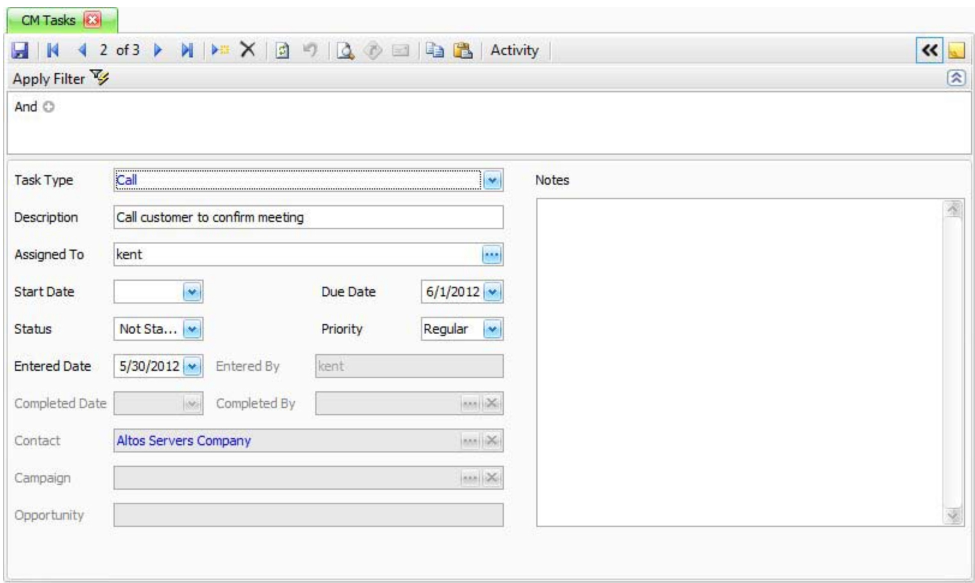
8. To work with the Task's detailed information, select the Task and click the double arrow button » in the top right corner of the screen. See the section below for more information.

9. When you finish working with Tasks, close the screen to save your changes and return to the menu.

Working with Detailed Task Information

1. To work with the Task's detailed information, select the Task and click the double arrow button » in the top right corner of the screen. The detailed Tasks screen appears and lists its basic information, and any detailed notes.

Tasks Screen - Detail



2. If necessary, edit any of the information listed on the screen. To create a new Task, click the **New Record** button on the toolbar. Use caution, however, the Tasks are not associated with a contact or other source. To make sure that Tasks are associated with the correct source, use the **Tasks** button on the Contacts, Campaign, and Activity screens to add Tasks.
3. Enter any **Notes** you want to record about the task. Press **Ctrl+Enter** to begin a new line.
4. Click the **Save** button to save your changes and return to the Tasks list.

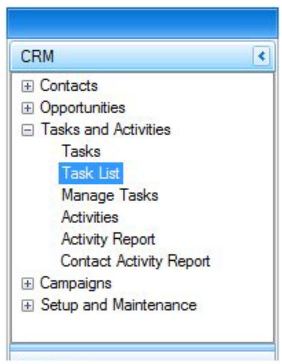
TASK LIST

Print the **Task List** to view the status of Tasks you have entered and assigned to employees. You can view this list for specific statuses (**All**, **Pending**, **Completed**, or **Expired**) or for different user Types (**Assigned To**, **Entered By**, or **Completed By**) to see which tasks are completed and who is entering and completing them.

Follow these steps to print the **Task List**:

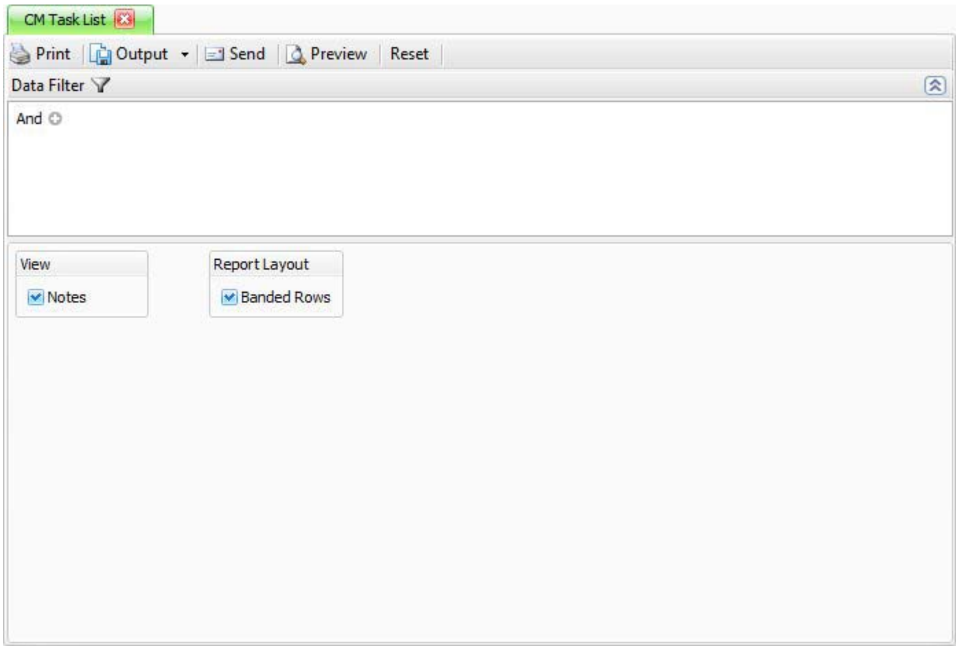
1. Select **Task List** from the **Tasks and Activities** menu.

Task List Menu



2. The **Task List** screen appears.

Task List Screen



3. Use the **Data Filter** area at the top of the screen to select the criteria to use to filter information that appears on the list. Only records matching the criteria you enter are printed. Leave this area blank to print all information. See the Reporting section in the General Information guide for more information on filtering and outputting reports.

   Only records that match the criteria you enter here are printed on the report.

   The system saves the last selection criteria you enter for use the next time you print that report.

4. Check the box to **View Notes** on the report. Clear the box to exclude **Notes** from the report.

5. Select the box if you want to print the report in **Banded Rows** format, which highlights lines in the report in alternating bands of color (or gray on monochrome printers). This makes wide reports easier to read. You can define your default preference for the banded rows format on the System Manager Business Rules. You can then override your default choice when you print the report.

6. Select a command button:

Command Buttons

Name	Description
Reset	Set all fields to their defaults.
Preview	Preview the report on your monitor.
Output	Output the report as a .pdf file and save it.
Send	Email the report with the report attached as a .pdf file.
Print	Print the report.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Task List

Sample Comp with CRM
Task List PAGE 1

Report Filter
View Notes Yes

Task Type / Description	Assigned To / Contact	Start Date / Due Date	Status / Priority	Entered Date / Completed Date	Entered By / Completed By
Call	kent		Not Started	5/30/2012	kent
Call Customer to confirm meeting		6/1/2012	Regular		
Notes					
Call	kent		Not Started	5/30/2012	kent
Call customer to confirm meeting	Altos Servers Company	6/1/2012	Regular		
Notes					
Demo	kent		Not Started	5/30/2012	kent
Demo TRAVERSE 11	Altos Servers Company	6/4/2012	Regular		
Notes					

*** End of Report ***

5/30/2012 12:41 PM kenthe

MANAGE TASKS

Use the **Manage Tasks** function to view Tasks and Responses by Task Type, the person the task is Assigned To, Status, and/or Priority.

Tasks record the things that you or your employees need to do to in order to further communication with a Contact. Instead of being associated with a Contact, Tasks are associated with your employees, the Users of CRM. Tasks are assigned to employees for completion and can carry expiration or Due Dates.

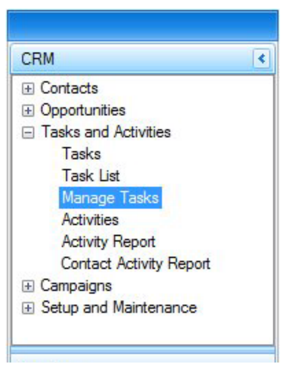
If there are values in the Contact, Campaign, or Opportunity columns of a Task record, you can drill down to view the details of those Activities.

You can add or remove columns from the Manage Tasks screen. See How To Use Grids in the General Information Guide for more information.

Follow these steps to **Manage Tasks**:

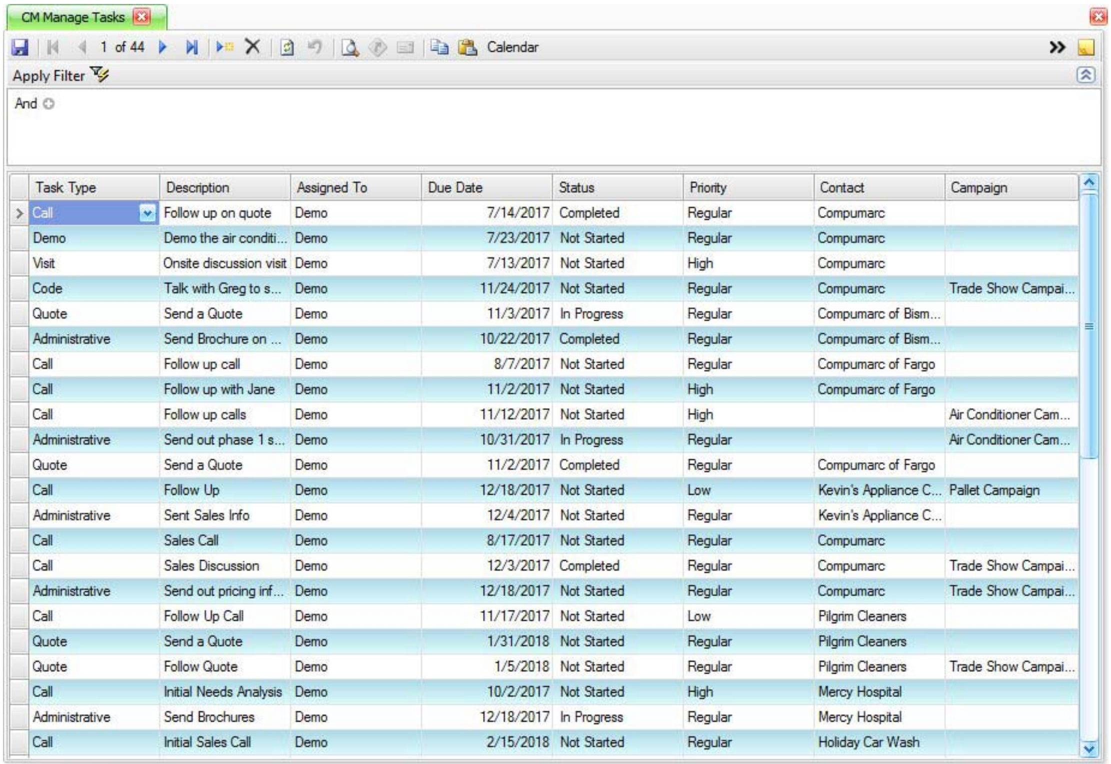
1. Select **Manage Tasks** from the **Tasks and Activities** menu.

Manage Tasks Menu



2. The **Manage Tasks** screen appears.

Manage Tasks Screen - Grid View

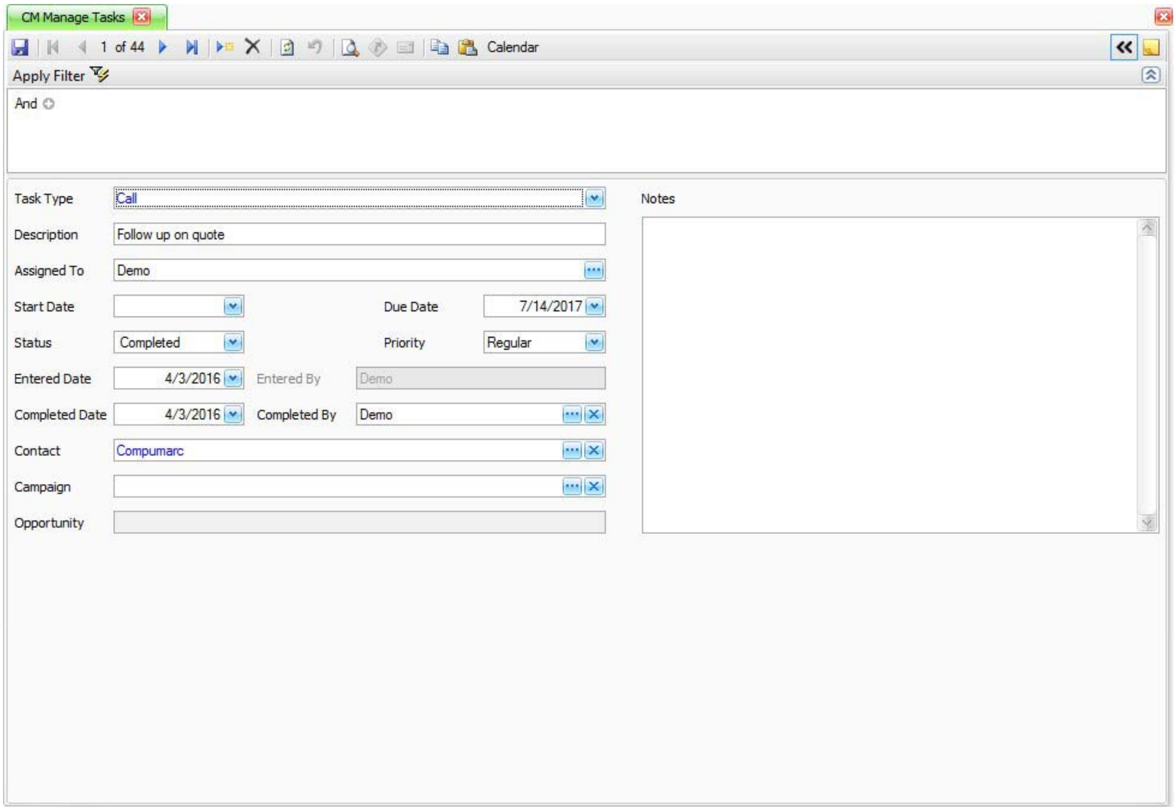


Task Type	Description	Assigned To	Due Date	Status	Priority	Contact	Campaign
Call	Follow up on quote	Demo	7/14/2017	Completed	Regular	Compumarc	
Demo	Demo the air conditi...	Demo	7/23/2017	Not Started	Regular	Compumarc	
Visit	Onsite discussion visit	Demo	7/13/2017	Not Started	High	Compumarc	
Code	Talk with Greg to s...	Demo	11/24/2017	Not Started	Regular	Compumarc	Trade Show Campai...
Quote	Send a Quote	Demo	11/3/2017	In Progress	Regular	Compumarc of Bism...	
Administrative	Send Brochure on ...	Demo	10/22/2017	Completed	Regular	Compumarc of Bism...	
Call	Follow up call	Demo	8/7/2017	Not Started	Regular	Compumarc of Fargo	
Call	Follow up with Jane	Demo	11/2/2017	Not Started	High	Compumarc of Fargo	
Call	Follow up calls	Demo	11/12/2017	Not Started	High		Air Conditioner Cam...
Administrative	Send out phase 1 s...	Demo	10/31/2017	In Progress	Regular		Air Conditioner Cam...
Quote	Send a Quote	Demo	11/2/2017	Completed	Regular	Compumarc of Fargo	
Call	Follow Up	Demo	12/18/2017	Not Started	Low	Kevin's Appliance C...	Pallet Campaign
Administrative	Sent Sales Info	Demo	12/4/2017	Not Started	Regular	Kevin's Appliance C...	
Call	Sales Call	Demo	8/17/2017	Not Started	Regular	Compumarc	
Call	Sales Discussion	Demo	12/3/2017	Completed	Regular	Compumarc	Trade Show Campai...
Administrative	Send out pricing inf...	Demo	12/18/2017	Not Started	Regular	Compumarc	Trade Show Campai...
Call	Follow Up Call	Demo	11/17/2017	Not Started	Low	Pilgrim Cleaners	
Quote	Send a Quote	Demo	1/31/2018	Not Started	Regular	Pilgrim Cleaners	
Quote	Follow Quote	Demo	1/5/2018	Not Started	Regular	Pilgrim Cleaners	Trade Show Campai...
Call	Initial Needs Analysis	Demo	10/2/2017	Not Started	High	Mercy Hospital	
Administrative	Send Brochures	Demo	12/18/2017	In Progress	Regular	Mercy Hospital	
Call	Initial Sales Call	Demo	2/15/2018	Not Started	Regular	Holiday Car Wash	

3. Use the Filter Area at the top of the screen to select the fields to filter by, such as Status or user type for which to view Tasks, then click **Apply Filter** to list the Tasks corresponding to your selection(s).

4. Use the Toggle button ( ) to switch between grid view and field view.

Manage Tasks Screen - Field View



1. Click the **New Record** button, on the toolbar, to open a blank Task record.
2. Select the type of task from the **Task Type** field.
3. Enter a description of the Task in the **Description** field.
4. Select the user to which to assign the task from the **Assigned To** field.
5. If available, select the date for which the task should start from the **Start Date** field.
6. Select the date by which the task is due from the **Due Date** field.
7. Select the status of the task from the **Status** field: **Not Started**, **In Progress**, **Completed**, **Waiting on someone else**, or **Deferred**.

    To complete a task, select **Completed** from the list. CRM automatically enters the workstation date as the task's Completed Date and moves the task from the list of Pending tasks to the list of Completed tasks.

To reopen a Completed task, select a different Status. CRM automatically deletes the Completed Date and moves the task from the Completed list to the Pending list.

8. Select the priority of the task from the **Priority** field: **Regular**, **High**, or **Low**.
9. Enter or select the contact for the task in the **Contact** field.
10. Select a campaign for the task from the **Campaign** field.
11. Use the **Calendar** button, on the toolbar, to open a calendar view.
12. Click the **Save** button , on the toolbar, to save the new Task record.

Task Summary

To editing a Task Record, follow these steps:

1. Apply the filter as necessary to sort Task records.
2. Select a Task record to edit.
3. Edit the fields as necessary.
4. Click the **Save** button , on the toolbar, to save the edited Task record.

To delete a Task Record, follow these steps:

1. Apply the filter as necessary to sort Task records.
2. Select a Task record to delete.
3. Click the **Delete** button , on the toolbar, to delete the selected Task record.
4. Click **Yes** at the “Are **you sure you want to delete selected record(s)?**” prompt.

Calendar Viewer

The Calendar function provides you with the ability to visually review Tasks as scheduled. You can add Tasks, or change the scheduling for them in the Calendar function. By using the buttons at the top of the calendar window, you can **Refresh** the calendar or choose to view the calendar by **Day**, **Work Week**, **Week**, **Month**, or **Schedule**. You can also sort the calendar by **Resource** or by **Date**.

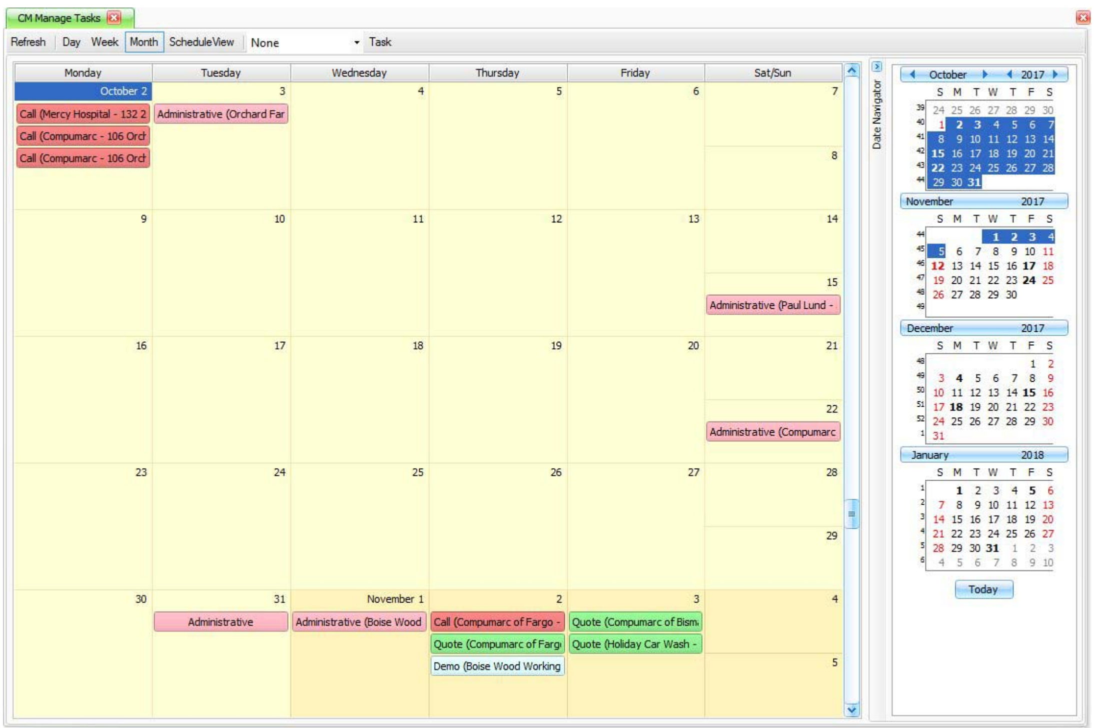
The center portion of the calendar window displays the calendar, including color-coded entries for Employees. To adjust the amount of information you can see on the calendar, use the plus ( ) and minus ( ) buttons on the lower right border of the center portion of the calendar. Double-click on any calendar entry to open the Manage Tasks window to change who the Task is Assigned To, Contact, Start or Due Dates, or add Notes to the entry.

The sliding Date Navigator on the right side of the calendar window displays full monthly views of the current month plus one month previous to today's date, as well as a few months into the future. This gives you a quick, convenient reference to help you schedule your Tasks.

You can show or hide the sliding menus with the arrow buttons at the top of the menu borders.

Select the **Task** button to return to the **Manage Tasks** screen.

Tasks Calendar View

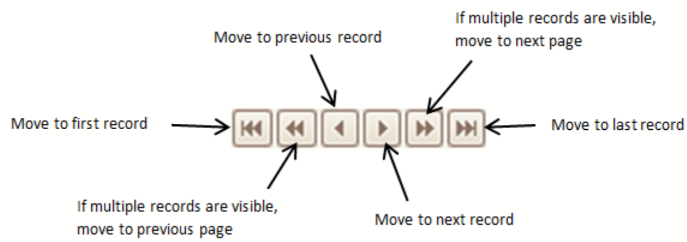


Changing the Appearance of the Calendar View

1. There are many ways you can change how the calendar looks to give you the best view of your scheduled Tasks.
2. The side panels can be hidden to allow more room for the main central panel. Use each panel's Hide-Show buttons (or) on the panel's main bar to hide or show the panel.
3. To adjust the width or height of a panel or section, move the mouse over the edge of the panel or section until the cursor becomes a two-headed arrow . Then click and drag the edge of the panel or section until it is the size you want. Release the mouse button to stop sizing the panel or section.

4. If you have selected a grouping option for the Schedule View, you will have the option of zooming in or out of the calendar to see more or less data. Use the increase visible data ( ) or decrease visible data ( ) buttons in the lower right corner of the calendar view's central panel to adjust the amount of data you can see on the calendar in the central panel.

5. If you have a grouping option selected for the Schedule View, you can move through the records that make up a group by using the record navigation buttons in the lower right corner of the calendar view's central panel.



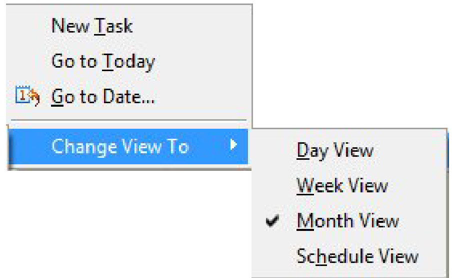
Calendar View Actions

6. When you double-click on a scheduled Task, you are taken to the Manage Tasks screen in the field view format. Edit the Task if necessary.

7. When you right-click on the calendar, you can use shortcuts on the context menu to perform various actions.

8. The context menu commands will change depending on where you right-click.

9. If you right-click when your mouse is on an empty area of the calendar, you will get the following options:



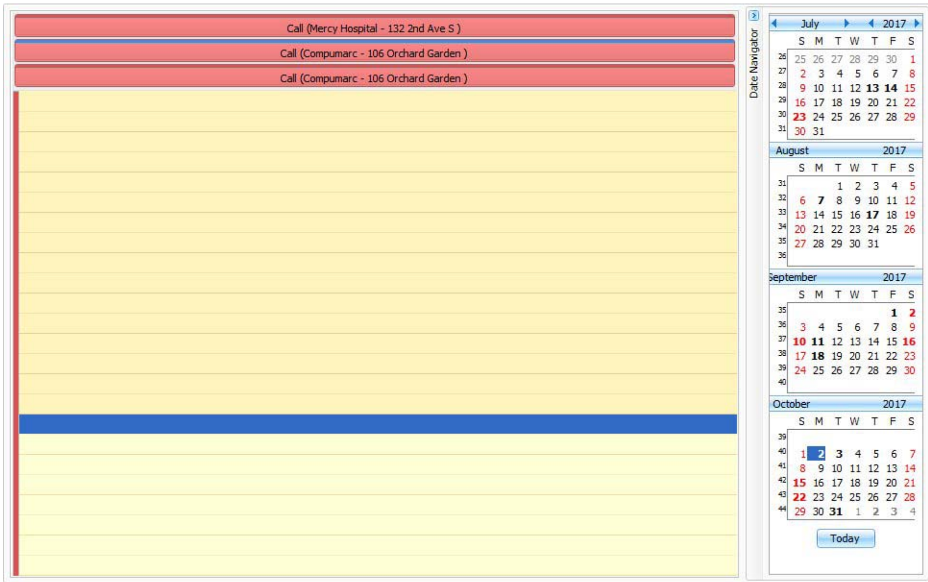
Name	Description
New Task	Open the function you use to create the Task directly from the calendar
Go to Today	Jump to today's date
Go to Date	Jump to a particular date
Change View To	Change the view of the calendar without using the command buttons at the top of the screen.

10. If you right-click when your mouse is on a scheduled Task block on the calendar, you will get the following options:

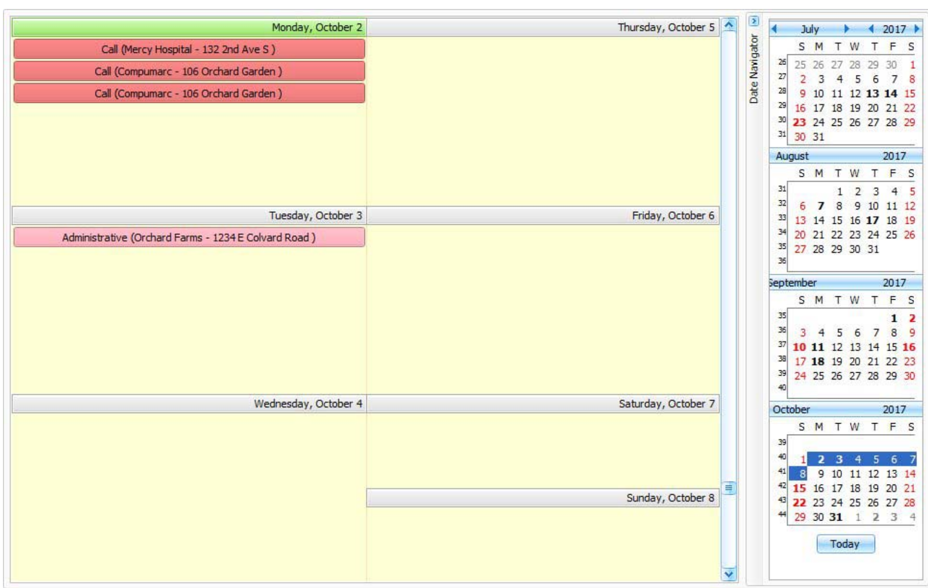
Name	Description
Open Task	Open the source for the scheduled Task
Delete Task	Delete the selected Task from the calendar

Calendar Views

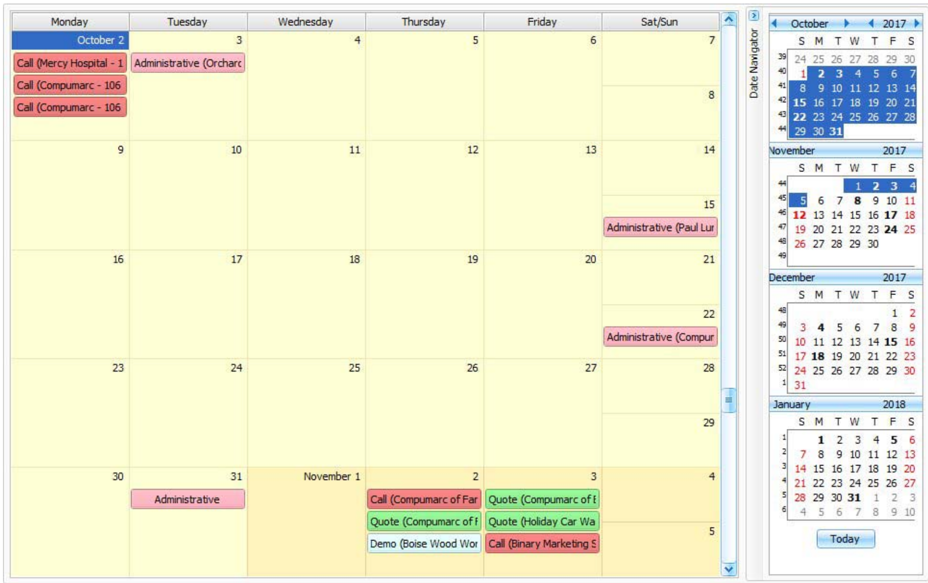
Calendar Day View - No Grouping



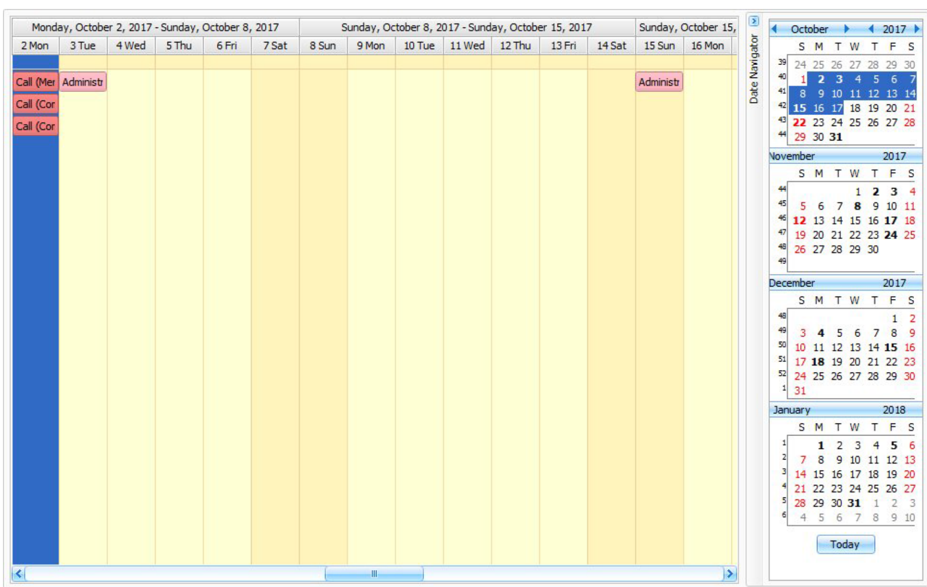
Calendar Week View - No Grouping



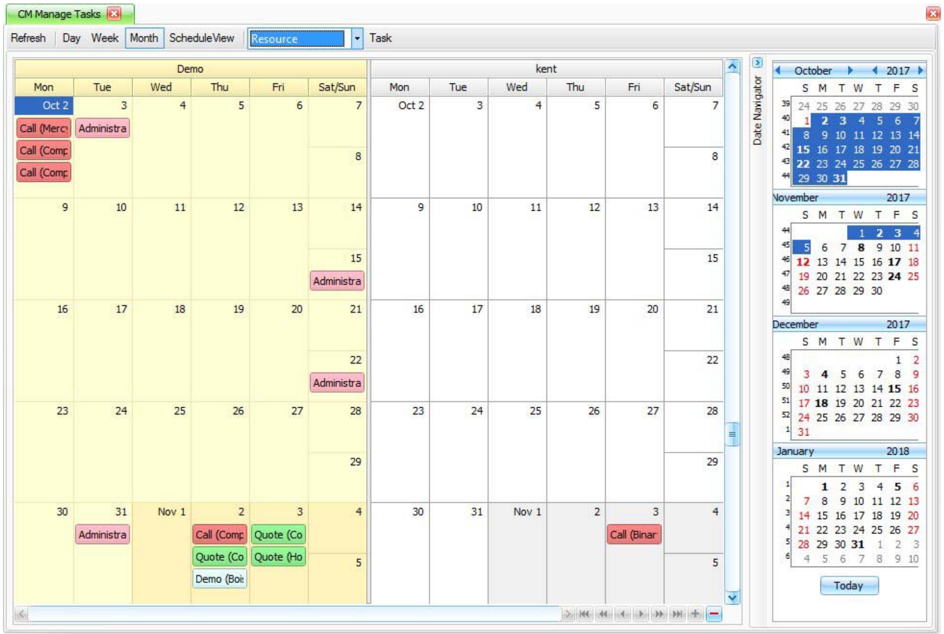
Calendar Month View - No Grouping



Calendar Schedule View - No Grouping

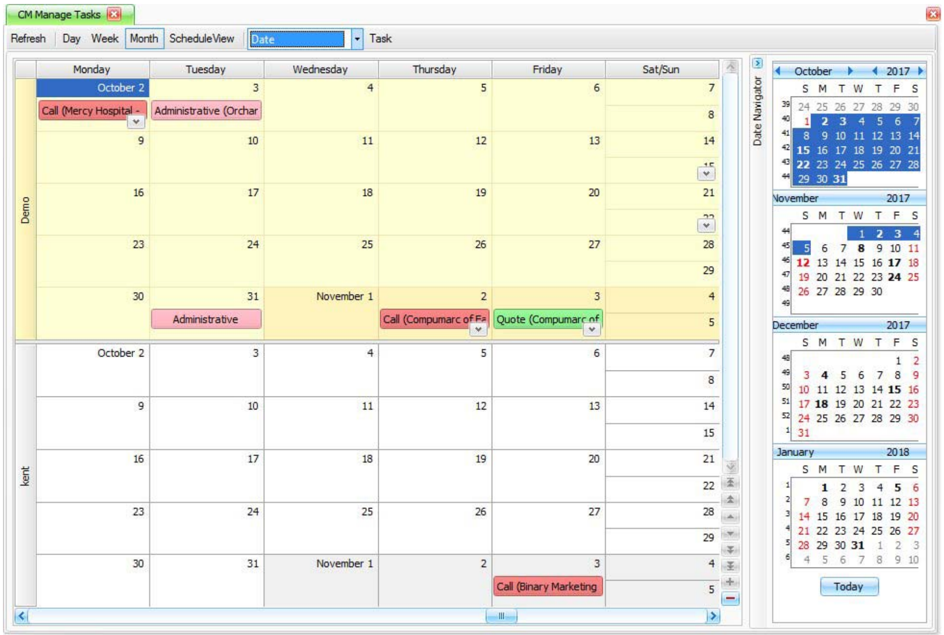


Calendar Month - Resource View



When you select to group the calendar by **Resource**, the grouping will rotate 90 degrees from the **Date** grouping. The Resource will be at the top and the Date or Days will be at the side.

Calendar Month - Date View



When you select to group the calendar by **Date**, the grouping will rotate 90 degrees from the **Resource** grouping. The Date or Days will be at the top and the Resource will be at the side.

ACTIVITIES

Activities record all actions relating to a Contact, allowing you to capture a historical record of the things your company has done for a specific Contact.

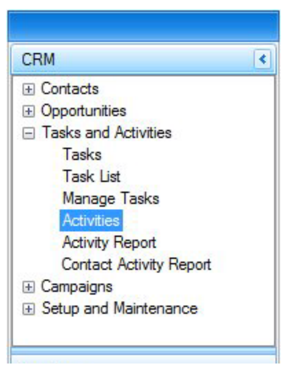
Activities can be added for Contact records either automatically or manually. When you add, update, or delete a contact, or generate a Campaign involving a Contact, CRM automatically records that Activity using one of the System Activity Types and associates it with the Contact. You can also manually add activity records and associate them with contacts to record contact actions, such as responses to Campaigns, follow ups resulting from Contact requests, or communications sent to Contacts for Campaigns or for general purposes.

Because Activities only record what has happened for a specific Contact, there is no duration, expiration date, or follow-up items associated with an Activity. If you need to record this type of information, add a Task to the Activity.

Follow these steps to work with activities:

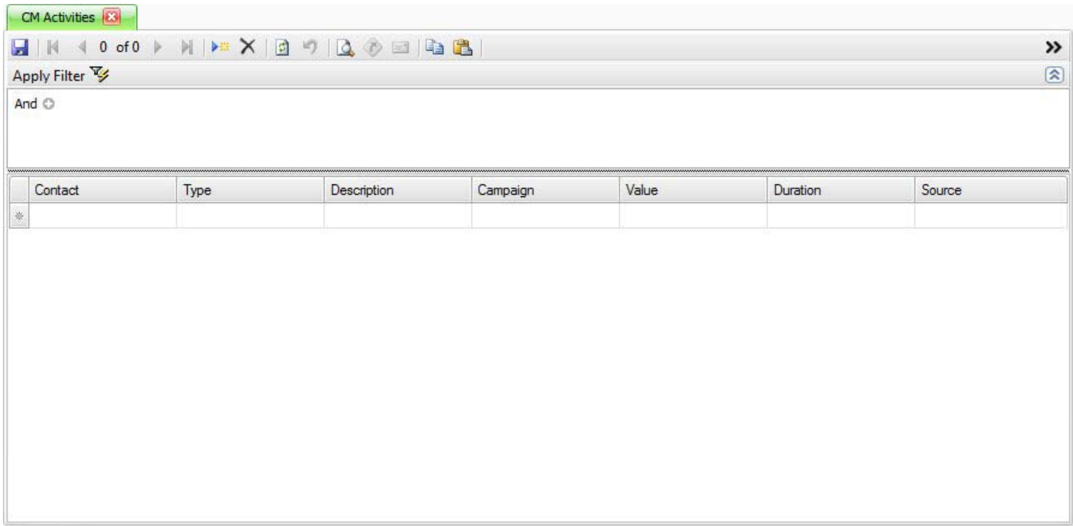
1. Select **Activities** from the **Tasks and Activities** menu.

Activities Menu



2. A blank **Activities** screen appears.

Activities Screen

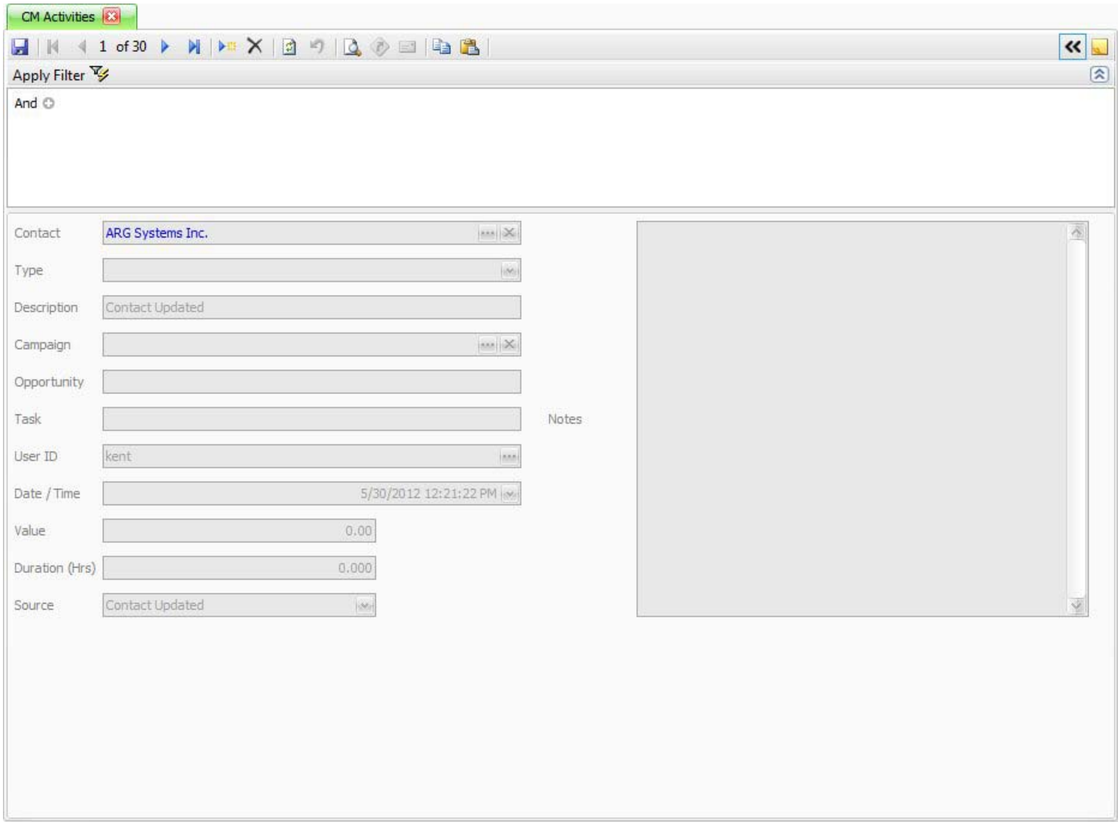


3. Use the Toggle buttons (» «) to switch between grid view and field view.

Maint

4. Select the **Contact Name** for which you want to add or edit activity records.
5. Enter information into the remaining columns to complete the activity recording.

Activity Screen Detail



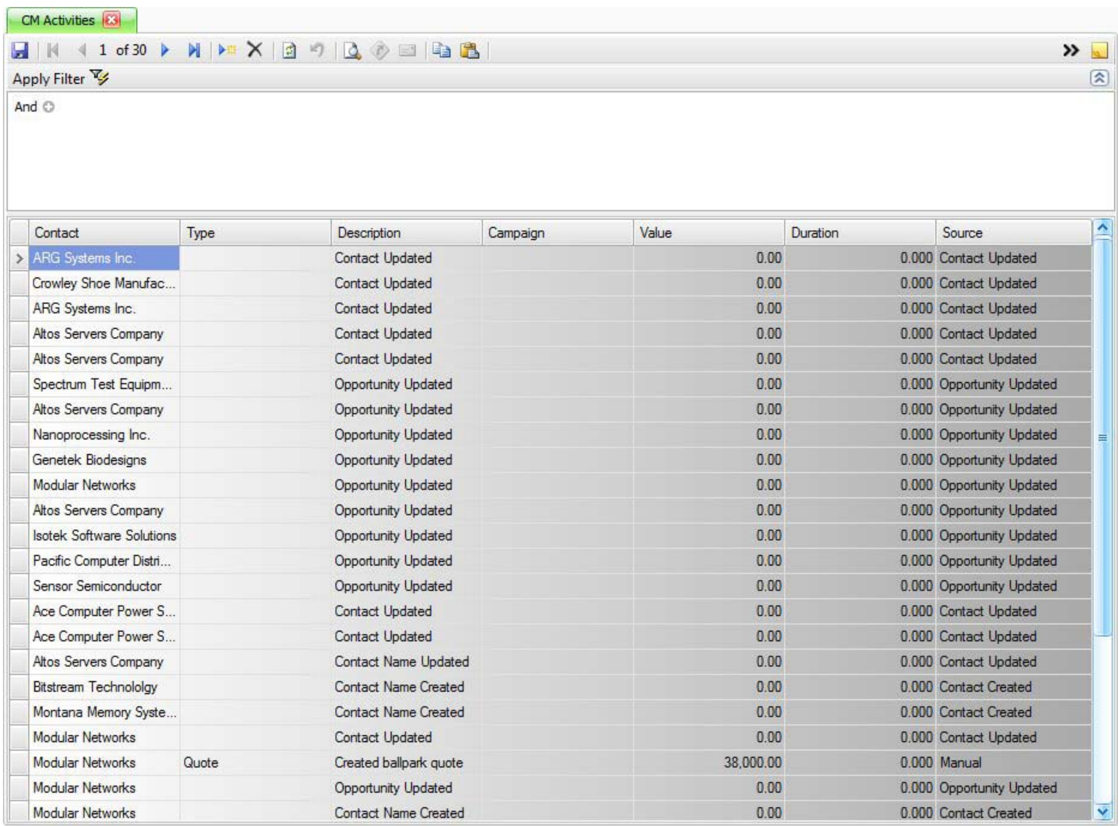
1. To work with the activities detailed information, select the activity and click the double arrow button » in the top right corner of the screen.
2. Click the **New Record** button , on the toolbar, to open a blank Activity record.
3. Select the **Contact Name** for which you want to add or edit activity records.

Maint

4. Select the type of activity from the **Type** field. These Activity Types will be from the Activity Types function (page 4-25)you used to set up the Activity Types.
5. Enter a description of the activity in the **Description** field.
6. If the Activity was generated from a **Campaign**, **Opportunity**, or **Task**, the corresponding description will be displayed.
7. Select the date and time for which the activity took place from the **Date/Time** field.
8. Enter the value amount for which the activity cost in the **Value** field.

9. Enter the duration, in hours, that the activity took in the **Duration** field.
10. Enter any applicable notes for the activity in the **Notes** section.
11. The Source of the Activity is displayed. Some examples of sources would be Manual, Task Completed, Opportunity Created, Contact Updated, Opportunity Updated and so forth.
12. Click the Save button, on the toolbar, to save the new Activity record.

Activity Screen



Contact	Type	Description	Campaign	Value	Duration	Source
ARG Systems Inc.		Contact Updated		0.00	0.000	Contact Updated
Crowley Shoe Manufac...		Contact Updated		0.00	0.000	Contact Updated
ARG Systems Inc.		Contact Updated		0.00	0.000	Contact Updated
Altos Servers Company		Contact Updated		0.00	0.000	Contact Updated
Altos Servers Company		Contact Updated		0.00	0.000	Contact Updated
Spectrum Test Equipm...		Opportunity Updated		0.00	0.000	Opportunity Updated
Altos Servers Company		Opportunity Updated		0.00	0.000	Opportunity Updated
Nanoprocessing Inc.		Opportunity Updated		0.00	0.000	Opportunity Updated
Genetek Biodesigns		Opportunity Updated		0.00	0.000	Opportunity Updated
Modular Networks		Opportunity Updated		0.00	0.000	Opportunity Updated
Altos Servers Company		Opportunity Updated		0.00	0.000	Opportunity Updated
Isotek Software Solutions		Opportunity Updated		0.00	0.000	Opportunity Updated
Pacific Computer Distri...		Opportunity Updated		0.00	0.000	Opportunity Updated
Sensor Semiconductor		Opportunity Updated		0.00	0.000	Opportunity Updated
Ace Computer Power S...		Contact Updated		0.00	0.000	Contact Updated
Ace Computer Power S...		Contact Updated		0.00	0.000	Contact Updated
Altos Servers Company		Contact Name Updated		0.00	0.000	Contact Updated
Bitstream Technololgy		Contact Name Created		0.00	0.000	Contact Created
Montana Memory Syste...		Contact Name Created		0.00	0.000	Contact Created
Modular Networks		Contact Updated		0.00	0.000	Contact Updated
Modular Networks	Quote	Created ballpark quote		38,000.00	0.000	Manual
Modular Networks		Opportunity Updated		0.00	0.000	Opportunity Updated
Modular Networks		Contact Name Created		0.00	0.000	Contact Created

To view activities for a different status or user type, use the Filter Area at the top of the screen, then click **Apply Filter**.

To edit an existing activity, select the activity you want to work with from the list. The system generated activities are gray colored and cannot be edited.

13. To work with activities for a different contact, use the filter area at the top of the screen, then click **Apply Filter**.

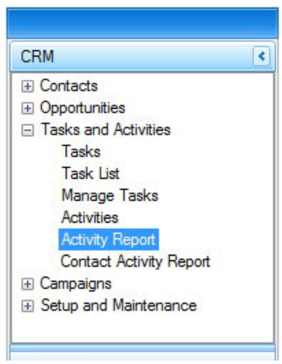
ACTIVITY REPORT

Print the **Activity Report** to view a list of all Activities recorded for Contacts. This report helps you view the entire history for Contacts to analyze their trends: whether they like a lot of contact, how often they contact you and for what reasons, or how good your relationship is with them.

Follow these steps to print the **Activity Report**:

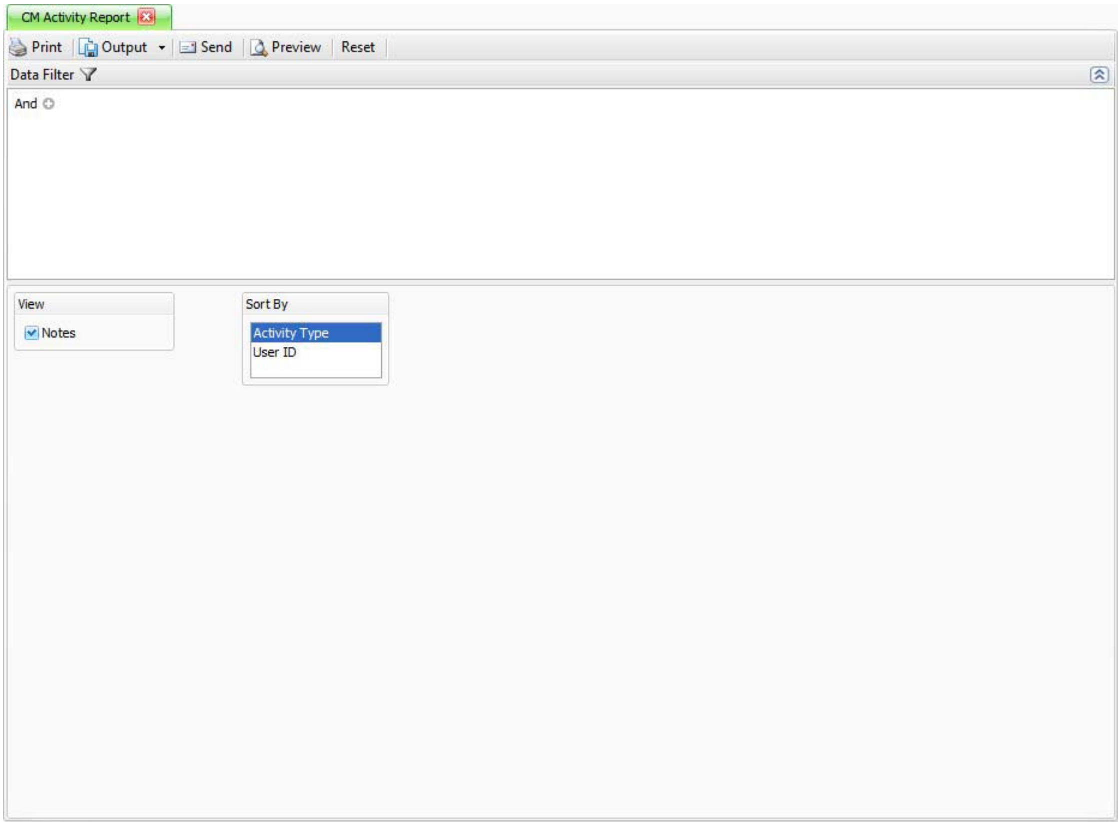
1. Select **Activity Report** from the **Tasks and Activities** menu.

Activity Report Menu



2. The **Activity Reports** screen appears.

Activity Report Screen



3. Use the **Data Filter** area at the top of the screen to select the criteria to use to filter information that appears on the list. Only records matching the criteria you enter are printed. Leave this area blank to print all information. See the Reporting section in the General Information guide for more information on filtering and outputting reports.

   Only records that match the criteria you enter here are printed on the report.

   The system saves the last selection criteria you enter for use the next time you print that report.

4. Check the box to **View Notes** on the report. Clear the box to exclude **Notes** from the report.

5. Select the **Sort By** criteria: **Activity Type** or **User ID.**

6. Select a command button:

Command Buttons

Name	Description
Reset	Set all fields to their defaults.
Preview	Preview the report on your monitor.
Output	Output the report as a .pdf file and save it.
Send	Email the report with the report attached as a .pdf file.
Print	Print the report.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Activity Report

Sample Comp with CRM
Activity Report
Sorted by Activity Type

PAGE 1

Report Filter
View Notes Yes

Activity Type / User ID	Entry Date	Entry Time	Contact	Description	Value	Duration (hrs)	Campaign Description
Quote							
demo	9/10/2009	10:58 AM	Modular Networks	Created ballpark quote	38,000.00	0.000	
	Notes	Need to follow up with Jason in a week.					
System Defined							
demo	9/6/2009	1:34 PM	Ace Computer Power Supply	Contact Updated	0.00	0.000	
demo	9/6/2009	1:39 PM	Advanced Cirquit Boards Plus	Contact Updated	0.00	0.000	
demo	9/6/2009	1:40 PM	Advanced Cirquit Boards Plus	Contact Updated	0.00	0.000	
demo	9/6/2009	1:42 PM	All Peripherals Inc.	Contact Updated	0.00	0.000	
demo	9/6/2009	1:47 PM	Altos Servers Company	Contact Updated	0.00	0.000	
demo	9/6/2009	1:48 PM	Altos Servers Company	Contact Name Created	0.00	0.000	
demo	9/10/2009	9:31 AM	Modular Networks	Contact Name Created	0.00	0.000	
demo	9/10/2009	9:31 AM	Modular Networks	Contact Name Created	0.00	0.000	
demo	9/10/2009	9:41 AM	Modular Networks	Opportunity Updated	0.00	0.000	
demo	9/10/2009	11:01 AM	Modular Networks	Contact Updated	0.00	0.000	
demo	1/1/2010	6:24 PM	Bitstream Technololgy	Contact Name Created	0.00	0.000	
demo	1/1/2010	6:24 PM	Montana Memory Systems	Contact Name Created	0.00	0.000	
demo	1/1/2010	6:25 PM	Altos Servers Company	Contact Name Updated	0.00	0.000	
demo	3/25/2010	11:57 AM	Ace Computer Power Supply	Contact Updated	0.00	0.000	
demo	3/25/2010	11:58 AM	Ace Computer Power Supply	Contact Updated	0.00	0.000	
demo	4/1/2010	11:28 AM	Sensor Semiconductor	Opportunity Updated	0.00	0.000	
demo	4/1/2010	11:29 AM	Altos Servers Company	Opportunity Updated	0.00	0.000	
demo	4/1/2010	11:29 AM	Modular Networks	Opportunity Updated	0.00	0.000	
demo	4/1/2010	11:29 AM	Pacific Computer Distribution	Opportunity Updated	0.00	0.000	
demo	4/1/2010	11:29 AM	Isotek Software Solutions	Opportunity Updated	0.00	0.000	
demo	4/1/2010	11:30 AM	Altos Servers Company	Opportunity Updated	0.00	0.000	
demo	4/1/2010	11:30 AM	Spectrum Test Equipment	Opportunity Updated	0.00	0.000	
demo	4/1/2010	11:30 AM	Genetek Biodesigns	Opportunity Updated	0.00	0.000	
demo	4/1/2010	11:30 AM	Nanoprocessing Inc.	Opportunity Updated	0.00	0.000	
kent	5/30/2012	10:27 AM	Altos Servers Company	Contact Updated	0.00	0.000	
kent	5/30/2012	10:30 AM	Altos Servers Company	Contact Updated	0.00	0.000	
kent	5/30/2012	12:19 PM	Crowley Shoe Manufacturing	Contact Updated	0.00	0.000	
kent	5/30/2012	12:19 PM	ARG Systems Inc.	Contact Updated	0.00	0.000	
kent	5/30/2012	12:21 PM	ARG Systems Inc.	Contact Updated	0.00	0.000	

5/30/2012 12:45 PM **kenthe**

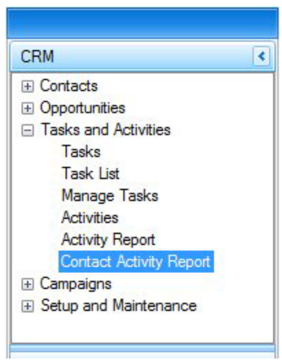
CONTACT ACTIVITY REPORT

Use the **Contact Activity Report** to view a list of Activities recorded for your specified Contacts. This report helps you view the history for your Contacts to analyze their trends: whether they like a lot of contact, how often they contact you and for what reasons, or how good your relationship is with them.

Follow these steps to print the **Contact Activity Report**:

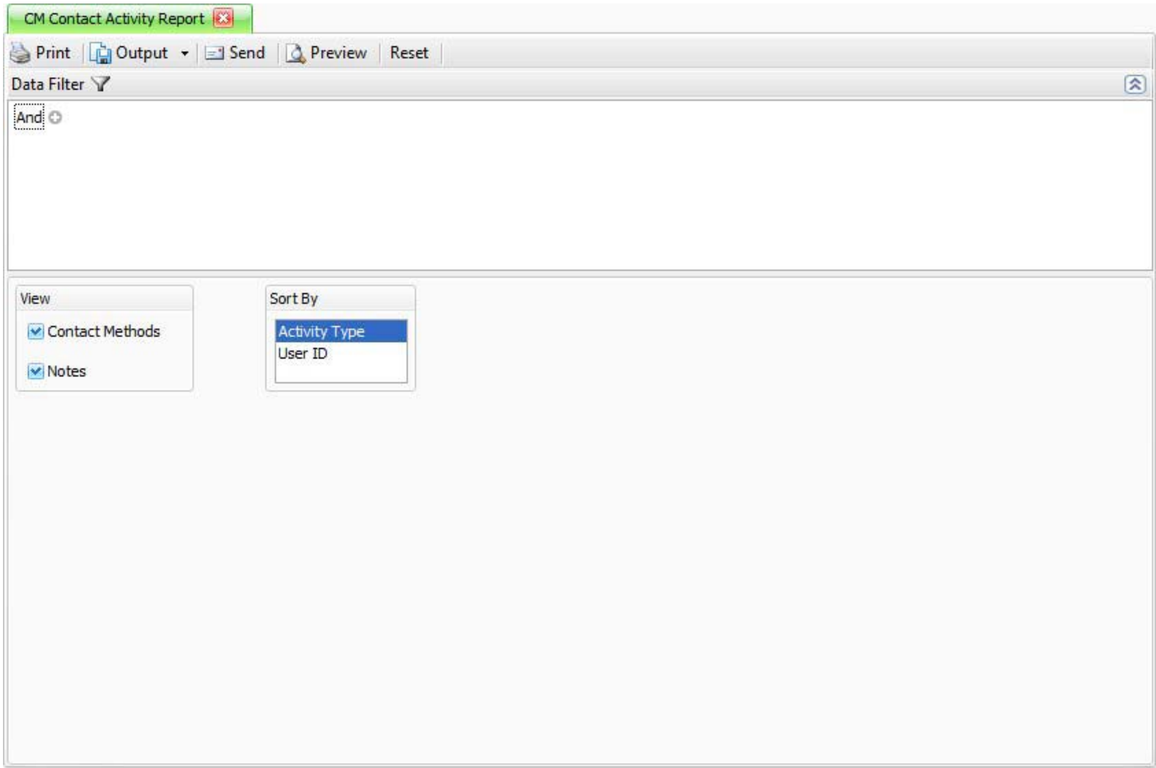
1. Select **Contact Activity Report** from the **Tasks and Activities** menu.

Contact Activity Report Menu



2. The **Contact Activity Reports** screen appears.

Contact Activity Report Screen



3. Use the **Data Filter** area at the top of the screen to select the criteria to use to filter information that appears on the report. Only records matching the criteria you enter are printed. Leave this area blank to print all information. See the Reporting section in the General Information guide for more information on filtering and outputting reports.

   Only records that match the criteria you enter here are printed on the report.

   The system saves the last selection criteria you enter for use the next time you print that report.

4. Select the box to **View Contact Methods** on the report to view the custom contact methods set up. Clear the box to exclude the **Contact Methods** from the report.
5. Select the box to **View Notes** on the report. Clear the box to exclude **Notes** from the report.
6. Select the **Sort By** criteria: **Activity Type** or **User ID.**

7. Select a command button:

Command Buttons

Name	Description
Reset	Set all fields to their defaults.
Preview	Preview the report on your monitor.
Output	Output the report as a .pdf file and save it.
Send	Email the report with the report attached as a .pdf file.
Print	Print the report.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Contact Activity Report

Sample Comp with CRM
Contact Activity Report
Sorted by Activity Type

PAGE 1

Report Filter

View Contact Methods Yes **View Notes** Yes

Contact / Activity Type	User ID	Address / Entry Date	Entry Time	Description	Contact Methods	Value	Duration (hrs)	Campaign Description
Ace Computer Power Supply		1437 Bellview Avenue Richfield, MN 55423						
System Defined	demo	9/6/2009	1:34 PM	Contact Updated		0.00	0.000	
System Defined	demo	3/25/2010	11:57 AM	Contact Updated		0.00	0.000	
System Defined	demo	3/25/2010	11:58 AM	Contact Updated		0.00	0.000	
Advanced Cirquit Boards Plus		2 Rockford Parklawn Circle Edina, MN 55424						
System Defined	demo	9/6/2009	1:39 PM	Contact Updated		0.00	0.000	
System Defined	demo	9/6/2009	1:40 PM	Contact Updated		0.00	0.000	
All Peripherals Inc.		2001 West 30th Street Minneapolis, MN 55417						
System Defined	demo	9/6/2009	1:42 PM	Contact Updated		0.00	0.000	
Altos Servers Company		945 Tuscon Drive No. 3 Rollingstone, MN 55969						
System Defined	demo	9/6/2009	1:47 PM	Contact Updated		0.00	0.000	
System Defined	demo	9/6/2009	1:48 PM	Contact Name Created		0.00	0.000	
System Defined	demo	1/1/2010	6:25 PM	Contact Name Updated		0.00	0.000	
System Defined	demo	4/1/2010	11:29 AM	Opportunity Updated		0.00	0.000	
System Defined	demo	4/1/2010	11:30 AM	Opportunity Updated		0.00	0.000	
System Defined	kent	5/30/2012	10:27 AM	Contact Updated		0.00	0.000	
System Defined	kent	5/30/2012	10:30 AM	Contact Updated		0.00	0.000	
ARG Systems Inc.		634 Crown Ave Woodbury, MN 55428						
System Defined	kent	5/30/2012	12:19 PM	Contact Updated		0.00	0.000	
System Defined	kent	5/30/2012	12:21 PM	Contact Updated		0.00	0.000	
Bitstream Technololgy		200 West 4th Street Des Moines, IA 50300						
System Defined	demo	1/1/2010	6:24 PM	Contact Name Created		0.00	0.000	

5/30/2012 12:46 PM **kenthe**

8

CAMPAIGNS

OVERVIEW

Campaigns are methods you communicate with your contacts to let them know how you are marketing your product. The Campaigns menu will let you set up campaigns to let your contacts know when you are having a marketing campaign or specials. You can print reports to track your campaign profitability, list the details of your campaigns and list details of your bulk communications. You also can add contact groups, define your communications with your contacts and set up bulk communications to get your campaigns out to your contacts with a single click of a button.

Contact Groups

Use the **Contact Groups** function to place contacts into groups, so that when sending Bulk Communications or creating Contact Labels, you can do so for an entire contact group instead of a single individual. (page 8-17)

Campaigns

Use the **Campaigns** function to set up your company's marketing campaigns. (page 8-5)

Campaign Profitability

Use the **Campaign Profitability** function to analyze whether the profits resulting from your campaigns justified their costs. This report compares the cost and value amounts you entered for a campaign (or for activities) to estimate a campaign's profit. (page 8-9)

Campaign List

Use the **Campaign List** function to view and verify the campaign information you entered in the Setup and Maintenance, Campaigns function. (page 8-13)

Define Communications

Use the **Define Communications** function to set up and design the communications your company sends to contacts. After setting up your communications, use the Bulk Communications function to send communications as part of your marketing and customer relationship workflow. (page 8-21)

Bulk Communications

Use the **Bulk Communications** function to generate and send the communication messages you set up in the Define Communications function. (page 8-27)

Communications List

Use the **Communications List** function to view and verify the communication information you entered in the Setup and Maintenance Communications function. (page 8-31)

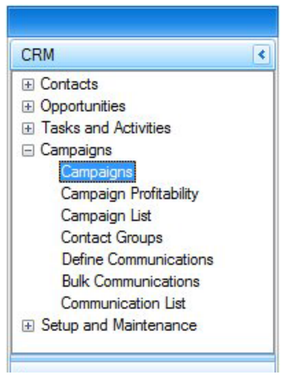
CAMPAIGNS

Use the **Campaigns** function to set up your company's marketing campaigns.

Follow these steps to work with campaigns:

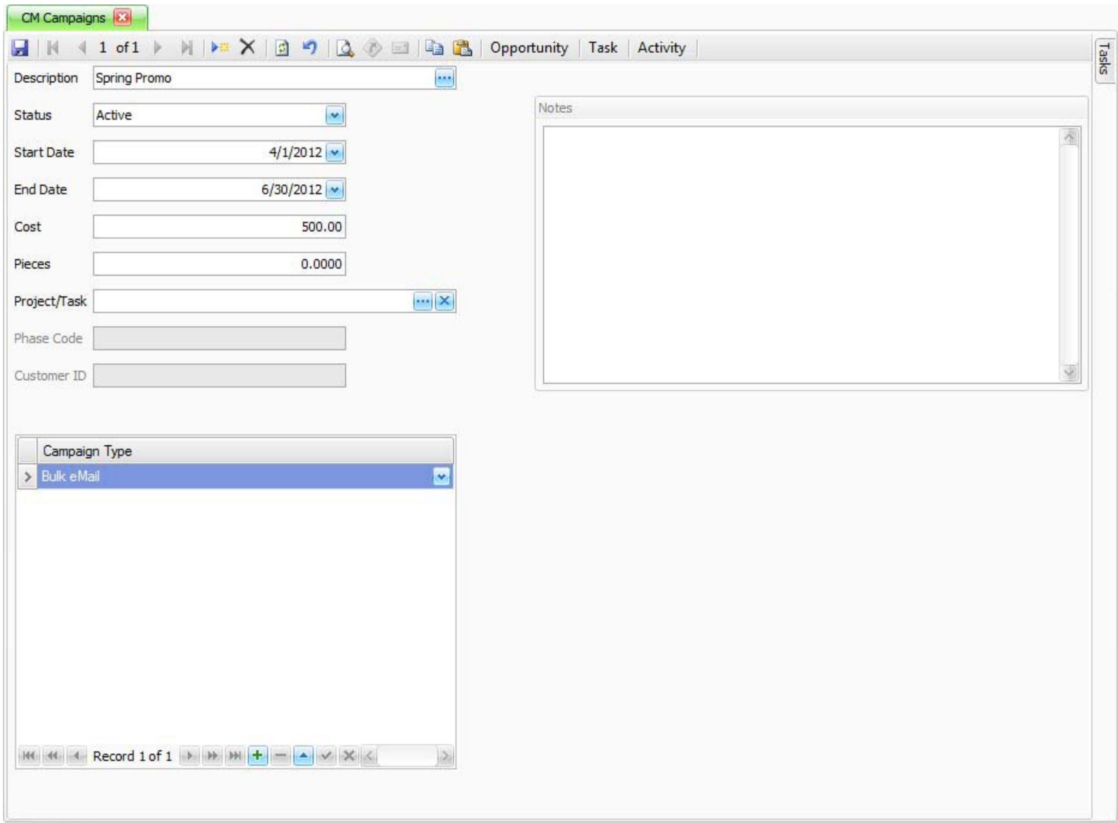
1. Select **Campaigns** from the **Campaigns** menu.

Campaigns Menu



2. The **Campaigns** screen appears.

Campaigns Screen



3. Enter the campaign's **Description**.
4. Select the campaign's **Status**: **Active** and **Inactive**.
5. Enter the campaign's **Start Date** and **End Date**.

   Leave this box blank to save this campaign indefinitely.

6. Enter the **Cost** of the campaign.

   If you interface CRM with Project Costing and you enter project information in the **Project ID**, **Phase Code**, and **Task Code** boxes below, CRM accesses that information in Project Costing for more accurate cost amounts. You can still use this box to enter cost estimates, however.

7. Enter the number of **Pieces** for the campaign, if applicable.

8. The **Project ID**, **Phase Code**, and **Task Code** boxes appear only if you interface CRM with Project Costing. Select the Project, Phase, and Task to associate with the campaign and from which to pull cost information.

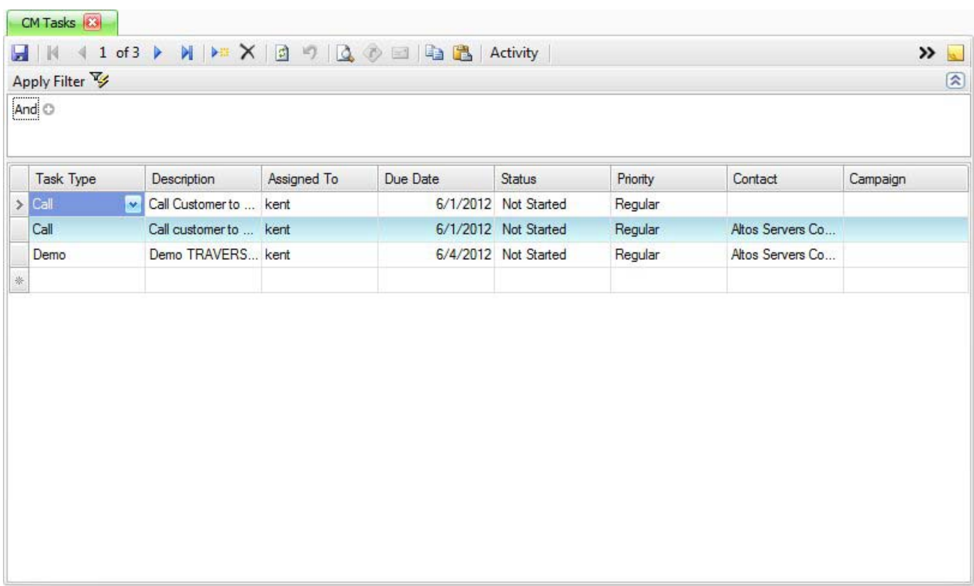
9. Add the **Campaign Types** you to include in the campaign. To add new Campaign Type click the green plus button , at the bottom of the Campaign Type box, and select the campaign types to include in this campaign. To delete a campaign type, select it and click the red minus button , at the bottom of the Campaign Type box.

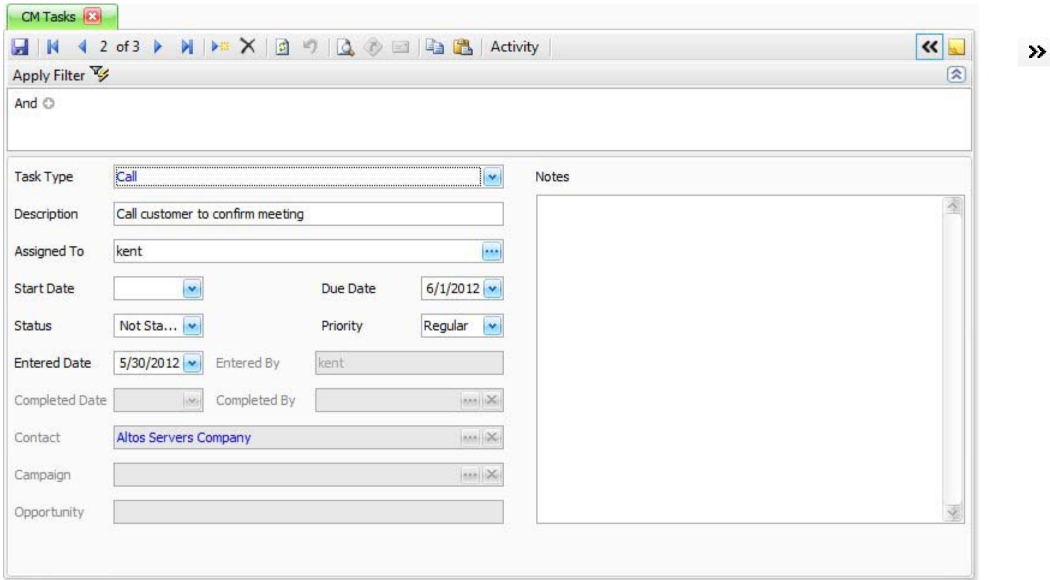
10. Enter any additional **Notes** you would like to add to the information about the campaign.

11. Click **Tasks** to add or view tasks related to the campaign. See (page 4-5) and (page 5-23) for more information.

12. The **Tasks** screen appears.

Campaign Tasks Screen





Maint

Select the **Task Type** and enter a **Description**, then enter the employee responsible for completing the Task. You can also select how long the Task should appear in Task Lists, adjust the Due Date, and edit the date the task was entered. Finally, enter any additional instructions or information in the **Notes** window. Close the screen to save your changes and return to the Campaign screen.

13. To edit a **Campaign** click on the Filter box and click the Campaign you want to edit.
14. Edit the information you want to change.
15. To delete a campaign, select the campaign **Description** to delete and click the **Delete** button on the toolbar. When the confirmation message appears, select **Yes** to delete the Campaign or **No** to return to the screen without deleting.
16. Click the Save button , on the toolbar, to save the new or edited Campaign record.
17. Close the screen to save your changes and return to the menu.

CAMPAIGN PROFITABILITY

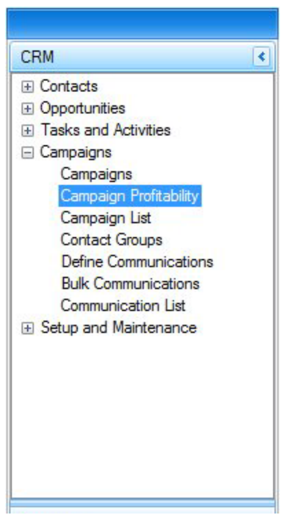
Print the **Campaign Profitability** report to analyze whether the profits resulting from your Campaigns justified their costs. This report compares the cost and value amounts you entered for a Campaign (or for Activities) to estimate a Campaign's profit.

If you interface CRM with Project Costing, cost information is pulled from the Projects you assigned to campaigns and that are maintained in Project Costing.

Follow these steps to print the **Campaign Profitability** report:

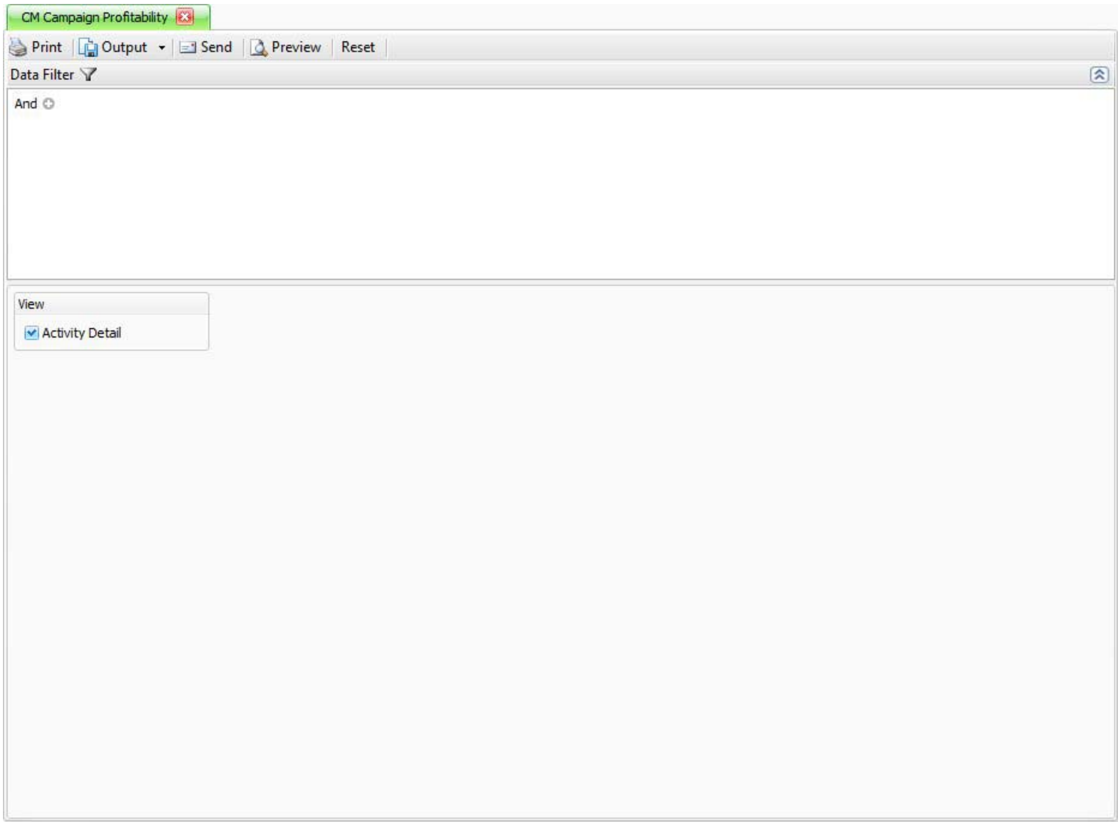
1. Select **Campaign Profitability** from the **Campaigns** menu.

Campaign Profitability Menu



2. The **Campaign Profitability** screen appears.

Campaign Profitability Screen



3. Use the **Data Filter** area at the top of the screen to select the criteria to use to filter information that appears on the report. Only records matching the criteria you enter are printed. Leave this area blank to print all information. See the Reporting section in the General Information guide for more information on filtering and outputting reports.

   Only records that match the criteria you enter here are printed on the report.

   The system saves the last selection criteria you enter for use the next time you print that report.

4. Check the box to **View Activity Detail** on the report. Clear the box to exclude **Activity Detail** from the report.

5. Select a command button:

Command Buttons

Name	Description
Reset	Set all fields to their defaults.
Preview	Preview the report on your monitor.
Output	Output the report as a .pdf file and save it.
Send	Email the report with the report attached as a .pdf file.
Print	Print the report.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Campaign Profitability Report

Sample Comp with CRM
Campaign Profitability

PAGE 1

Report Filter
View Activity Detail Yes

Description	Start Date	End Date	Cost	Value	Profit
Spring Promo	4/1/2012	6/30/2012	500.00	0.00	-500.00
Summer Promo	7/1/2012	9/30/2012	500.00	0.00	-500.00

*** End of Report ***

5/30/2012 12:53 PM kenthe

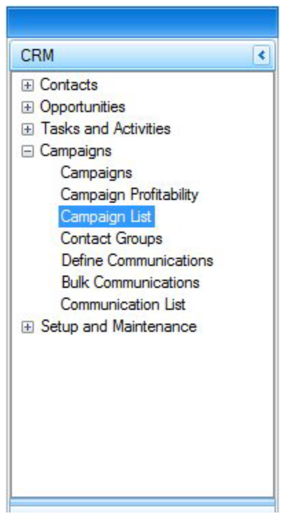
CAMPAIGN LIST

Print the **Campaign List** to view and verify the campaign information you entered in the **Campaigns** function.

Follow these steps to print the **Campaign List**:

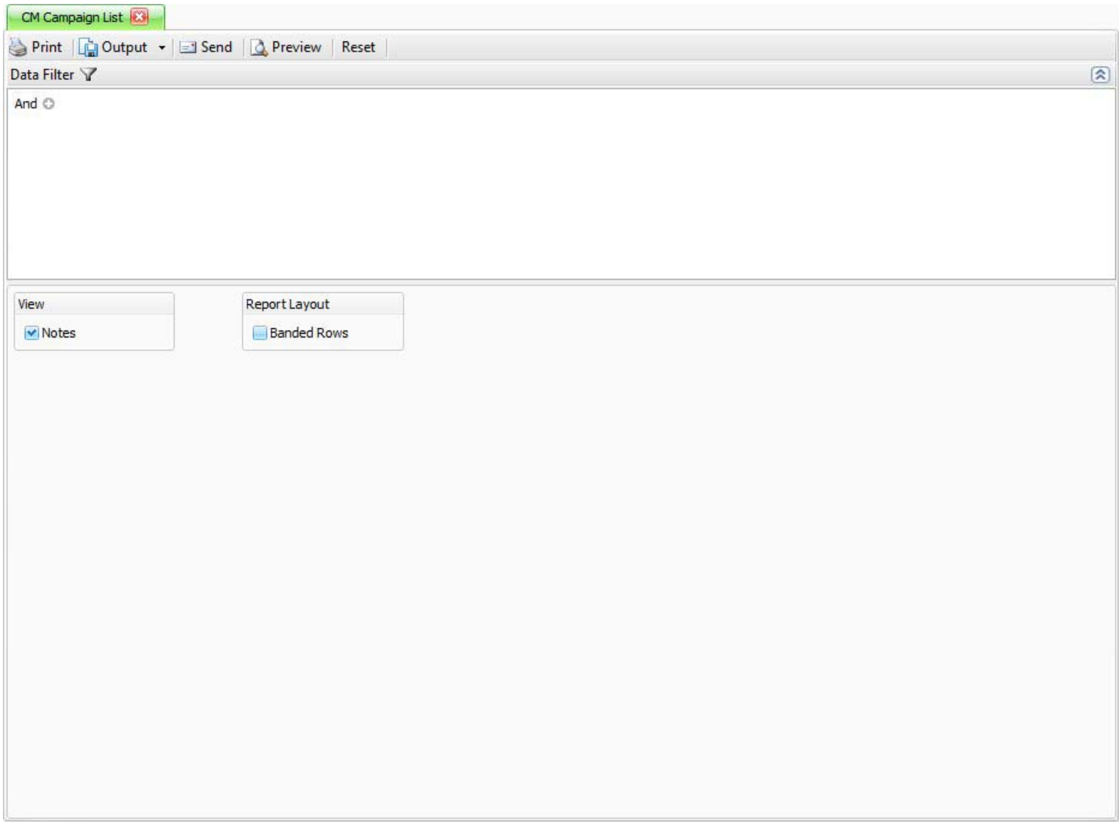
1. Select **Campaign List** from the **Campaigns** menu.

Campaign List Menu



2. The **Campaign List** screen appears.

Campaign List Screen



3. Use the **Data Filter** area at the top of the screen to select the criteria to use to filter information that appears on the report. Only records matching the criteria you enter are printed. Leave this area blank to print all information. See the Reporting section in the General Information guide for more information on filtering and outputting reports.

   Only records that match the criteria you enter here are printed on the report.

   The system saves the last selection criteria you enter for use the next time you print that report.

4. Select the box to **View Notes** on the report. Clear the box to leave the Notes off the report.

5. Select the check box if you want to print the report in **Banded Rows** format, which highlights lines in the report in alternating bands of color (or gray on monochrome printers). This makes wide reports easier to read. You can define your default preference for the banded rows format on the System Manager Business Rules. You can then override your default choice when you print the report.

6. Select a command button:

Command Buttons

Name	Description
Reset	Set all fields to their defaults.
Preview	Preview the report on your monitor.
Output	Output the report as a .pdf file and save it.
Send	Email the report with the report attached as a .pdf file.
Print	Print the report.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Campaign List

Sample Compwith CRM
Campaign List

PAGE 1

Report Filter
View Notes Yes

Description	Status Project / Task	Start Date Phase Code	End Date Customer ID	Cost Pieces
Spring Promo	Active	4/1/2012	6/30/2012	500.00 0.0000

Notes

Included Campaign Types
Bulk eMail

Summer Promo	Active	7/1/2012	9/30/2012	500.00 0.0000

Notes

Included Campaign Types
Bulk eMail

*** End of Report ***

5/30/2012 12:54 PM kenthe

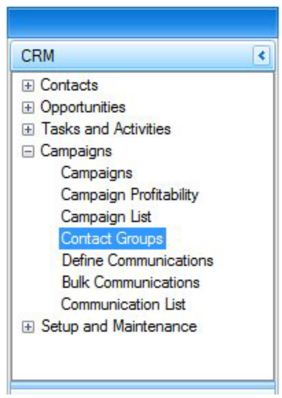
CONTACT GROUPS

Use the **Contact Groups** function to place contacts into groups, so that when sending Bulk Communications or creating Contact Labels, you can do so for an entire contact group instead of a single individual.

Follow these steps to work with Contact Groups:

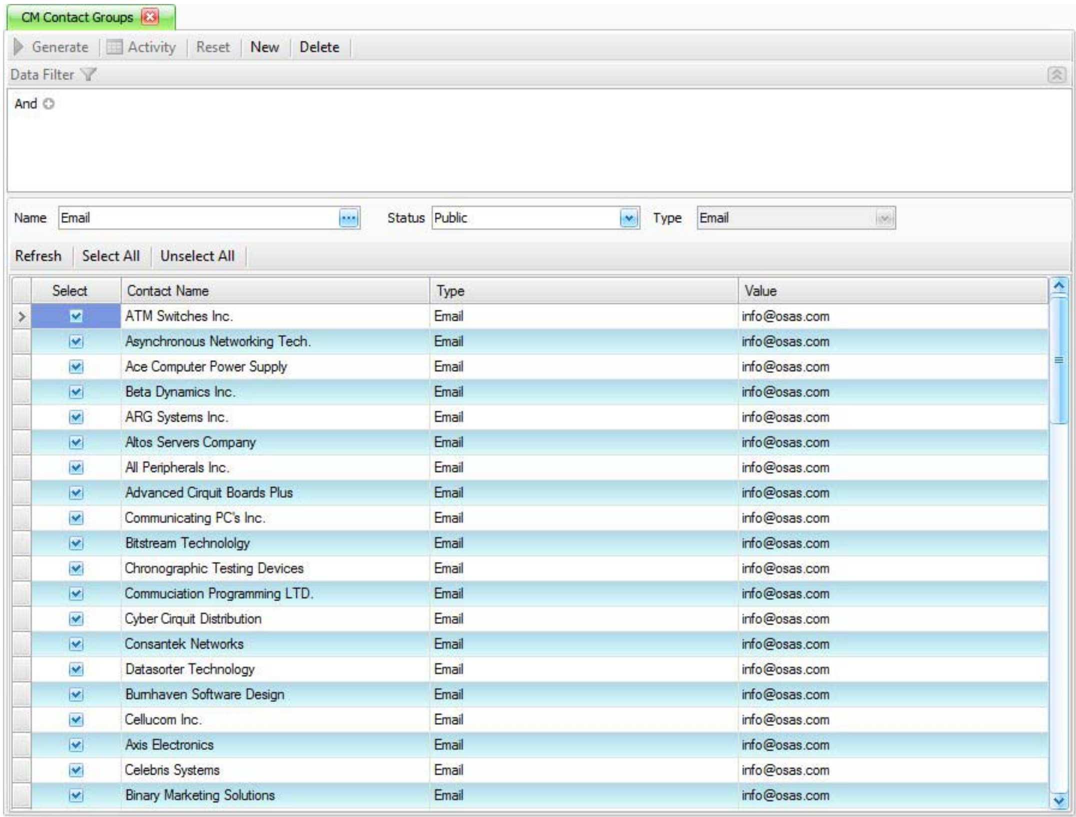
1. Select **Contact Groups** from the **Campaigns** menu.

Contact Groups Menu



2. The **Contact Groups** screen appears.

Contact Groups Screen



3. Click the **New Record** button  , on the toolbar, to open a blank Contact Group record.
4. Enter a name for the Contact Group in the **Name** field.
5. Select whether you want to create your own **Private** contact group or a **Public** Contact Group from the **Status** field.

   A **Private** contact group will only be available for the user that created the Contact Group.

   A **Public** Contact Group will be available for all users.
6. Select the Type of contact information you want to appear for the Contact Group from the **Type** field: **Phone, Fax, Email, Address** and **All.**

   This will look at both the general Contact information and the Contact Methods you set up in the Setup and Maintenance menu and added to the Contact records.

7. Use the **Data Filter** to select the range of filtering options or leave the filter blank to include all available data.
8. Click the **Generate** button to generate a list of Contacts using the criteria you selected above.
9. Select the **Select** check box adjacent to the contacts you want to include in the Contact Group.

NOTE: You can use the Select All button to select all contacts or the Unselect All button to unselect all contacts.

10. Click the **Refresh** button to save the contact group.

Task Summary

To edit a Contact Group, follow these steps:

1. Select a Contact Group to edit from the **Name** field.
2. Edit the Contacts included in the Group as necessary.
3. Click the **Refresh** button to save the edited contact group.

To delete a Contact Group, follow these steps:

1. Select a Contact Group to delete from the **Name** field.
2. Click the **Delete** button  , on the toolbar, to delete the selected Contact Group.
3. Click **Yes** at the "**Are you sure you want to delete selected record(s)?**" prompt.

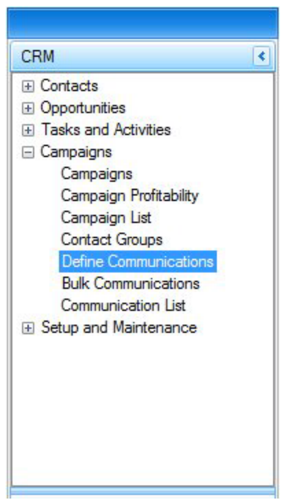
DEFINE COMMUNICATIONS

Use the **Define Communications** function to set up and design the Bulk Communications your company sends to Contacts. After setting up your Communications, use the **Bulk Communications** function on the **Campaigns** menu to send Communications as part of your marketing and customer relationship workflow.

Follow these steps to **Define Communications**:

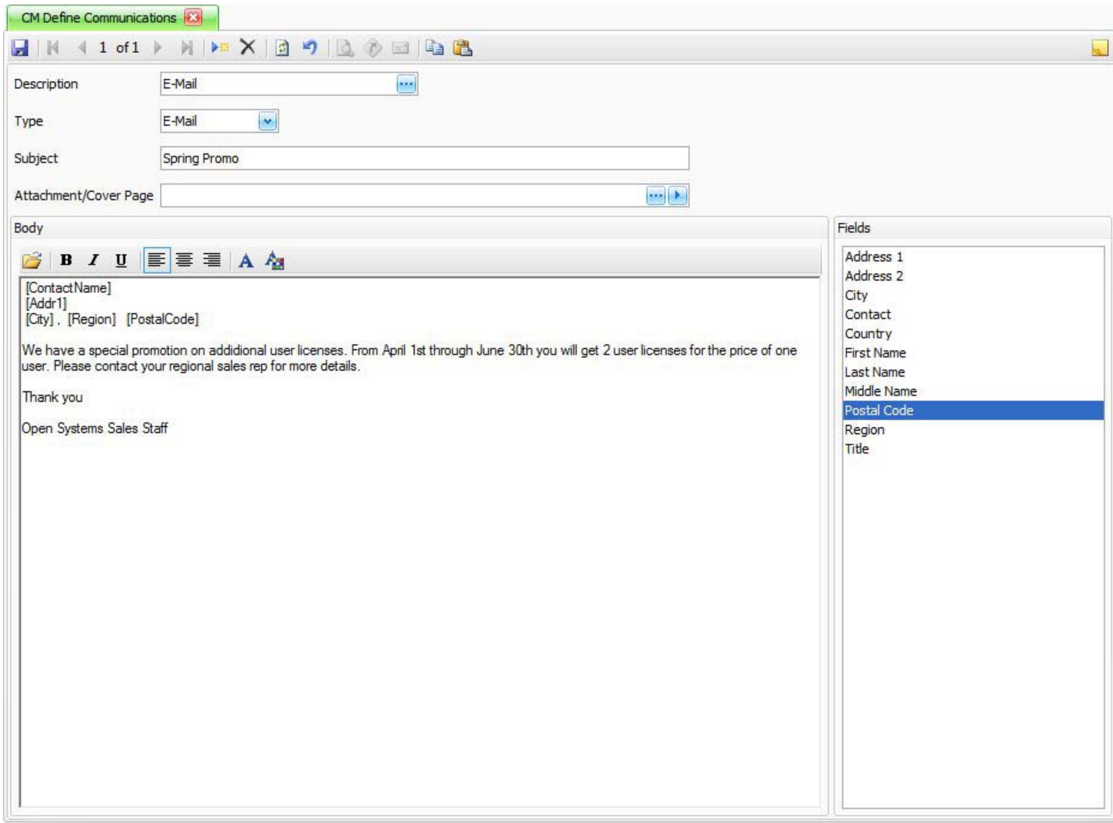
1. Select **Define Communications** from the **Campaigns** menu.

Define Communications Menu



2. The **Define Communications** screen appears.

Define Communications Screen



3. Enter the Bulk Communication record's **Description**.

4. Select the **Type**:

    - Select **E-Mail** to create an email message.
    - Select **Fax** to create a blast fax Bulk Communication.
    - Select **Print** to create a mail merge letter via Microsoft Word.

5. Enter the **Subject** of the Bulk Communication.

    If you're creating an email or fax, the text you enter is used as the email's or fax's subject. For print, the text is used as a field in the source document that you can import into the mail merge Word document.

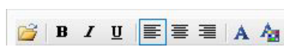
6. In the **Attachment/Cover Page** field, enter the directory path and name of the file to attach to emails and faxes or the Word document file to use as the mail merge document.

    Click the **Browse** button to use the Open dialog box to navigate to the file. After you locate the file and click **OK**, the directory path and file name are added to the **Attachment/Cover Page** field for you.

    Click the **View** button to launch the appropriate application and open the file.

7. Enter the text of the communication in the **Body** section of the screen.

    - Use the **Fields** list on the right side of the screen to have the Bulk Communications automatically bring in fields from the contact setup. Place your cursor in the **Body** box and double click on the **Field** you want to add to the body of the email, fax or mail merged print document.
    - Enter text into the **Body** box and this text appears as the main message.
    - Use the **Text** tool bar to format the text and fields entered into the body of the communication design. You can have text Bolded, Italicized, Underlined, Left Justified, Center Justified, Right Justified, select the Font, and Font Color.



8. Click the **Save** button and close the screen to save your changes.

Below are instructions on how to create the three types of communication definitions: **E-mail**, **Fax**, and **Mail Merge**.

E-mail Messages

When you create an **E-mail** bulk communication, you enter the **Subject** to use, the message to send in the E-mail's **Body**, and the file to attach, if any.

TRAVERSE uses the Messaging Application Programming Interface (MAPI) to connect to an email system and send email messages. Before you can send bulk email communications, make sure that your company's email client is MAPI-compatible. Consult your IT specialist or network administrator for help. The Email section of the System Manager Business Rules must be set up and functioning prior to sending Bulk Communication emails.

Fax Messages

When you create a **Fax**, you enter the Fax's **Subject**, **Body** message, and the file to attach to the Fax, if any.

TRAVERSE uses Fax/Mail Transport Protocol (available in most e-mail client systems) and the Windows Fax Console to exchange fax messages. Before you can send bulk fax communications, make sure that:

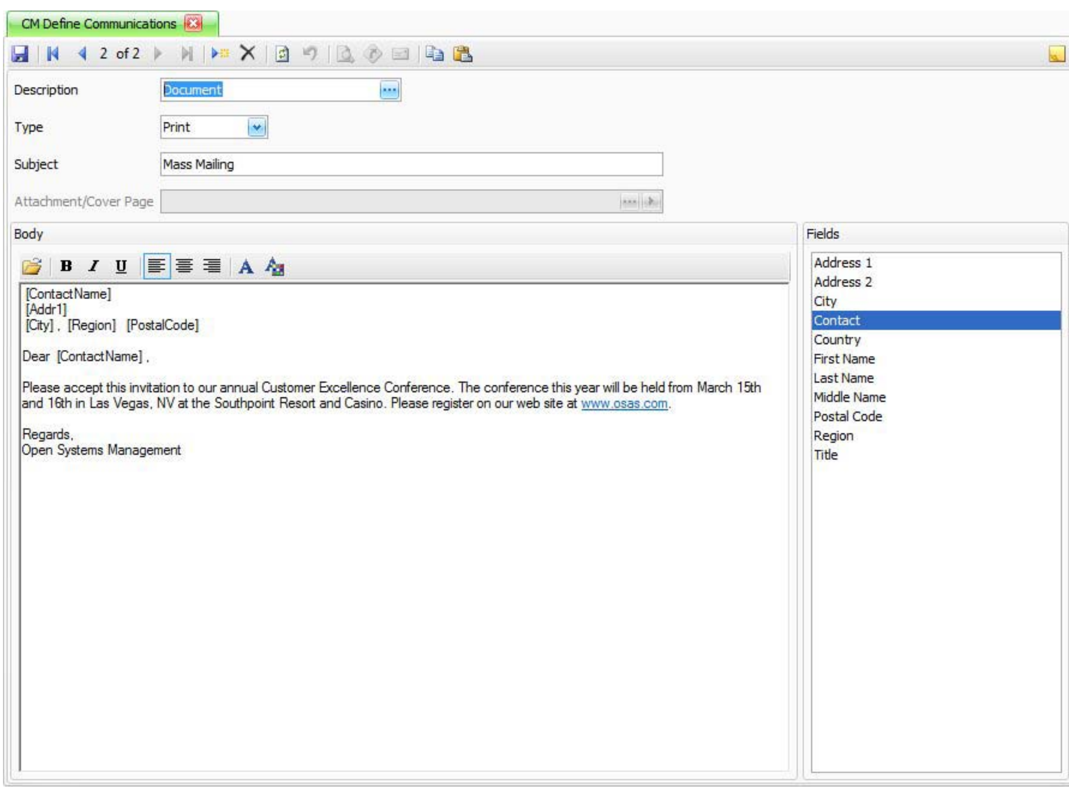
- Your company's email client is MAPI-compatible and that the Fax/Mail Transport Protocol has been enabled in the client.
- The network you connect to has a fax device set up.
- You have the Windows Fax Console installed and have pointed it at that fax device.
- The System Manager Business Rules Fax section has been set up and functioning correctly.

Consult your IT specialist or network administrator for help.

Mail Merge

When you create a **Print** communication, TRAVERSE automatically generates a print job sent to the printer you select. The fields selected and put into the Body of the Communication are used to pull in the Contact Names and Addresses.

Refer to the sample mail merge document included with CRM for help getting started with mail merge. Samples of a mail merge document and the personalized letters are shown at the end of this section.



Sample Mail Merge Documents

Mail Merge Document

The example below we added the Contact, Address1, City, Region and Postal Code and standard text to the Body of the communication setup. The address information appears on every letter.

Ace Computer Power Supply
1437 Bellview Avenue
Richfield , MN 55423

Dear Ace Computer Power Supply ,

Please accept this invitation to our annual Customer Excellence Conference. The conference this year will be held from March 15th and 16th in Las Vegas, NV at the Southpoint Resort and Casino. Please register on our web site at www.osas.com.

Regards,
Open Systems Management

BULK COMMUNICATIONS

Use the **Bulk Communications** function to generate and send the Bulk Communication messages you set up in the Campaigns **Define Communications** function.

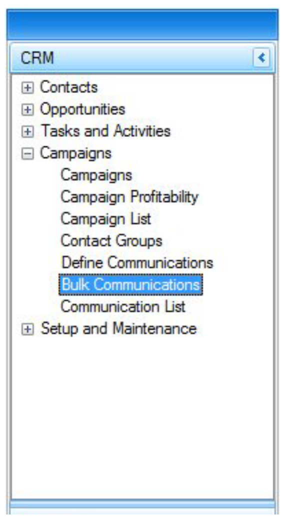
When you generate bulk communications, TRAVERSE creates the E-mail, Fax, or Print (mail merge) message based on the information you set up, then sends it to the Contacts that are included in that campaign type. TRAVERSE also creates a Generated Campaign system activity record for all Contacts included to record the action.

Before you can send bulk communications, you must set them up using the **Define Communications** function on the **Campaigns** menu. See (page 8-21) for more information.

Follow these steps to generate and send **Bulk Communication** messages:

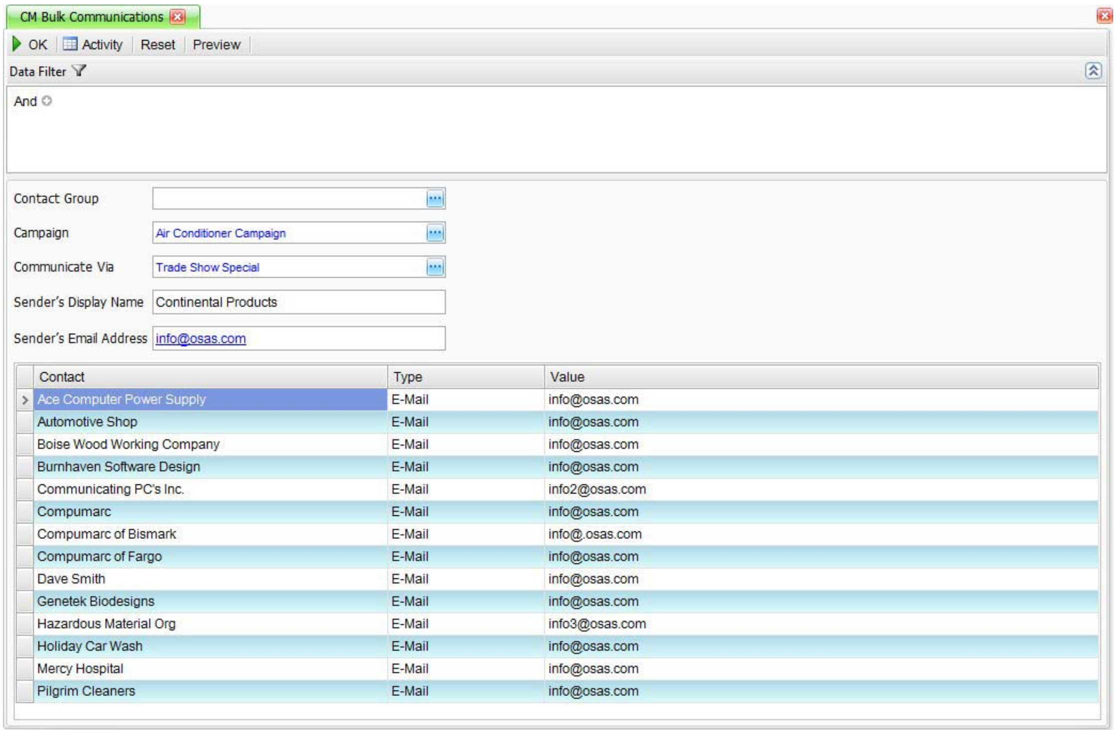
1. Select **Bulk Communications** from the **Campaigns** menu.

Bulk Communications Menu



2. The **Bulk Communications** screen appears.

Bulk Communications Screen



3. Use the **Filter Area** to enter the criteria to use to select the Contact records for which to generate Communications. Leave this area blank include all records. Communications are generated only for the records matching the criteria you enter here.

   The system uses the criteria you enter here and the Contact Groups from the Contact Groups function for which to generate Communications. If a Contact is included in your criteria but excluded from the Contact Group associated with the Campaign, that Contact is also excluded when CRM generates the Communication.

   Communications are generated for all applicable Contact Methods associated with that Contact. For example, if multiple email addresses are recorded for a given Contact, CRM generates one Communication for each address when you generate an email message.

4. Select the **Campaign** for the Bulk Communication. This step is optional.

    If you select a Campaign, CRM uses the excluded Campaign Types in Contact records to determine whether to include or exclude contacts from the Communication and creates an Activity record for each Contact included in the Communication. If you leave this field blank, no Activity is recorded and Contacts are only excluded from Communications if they are excluded from all Campaign Types.

5. Select the bulk communication to generate in the **Communicate Via** box.

6. If you want to change the default sender's name, enter a value to display as the sender in the **Sender's Display Name** field.

    This field is required to allow you to enter a Sender's Display Name that is different from the Sender's Display Name that is entered into the System Manager Business Rules, email area.

7. If you want to change the default sender's email address, enter a value to display as the sender's email address in the **Sender's Email Address** field.

    This field is required to allow you to enter a Sender's Email Address that is different from the Sender's Email Address that is entered into the System Manager Business Rules, email area.

8. Select a command button:

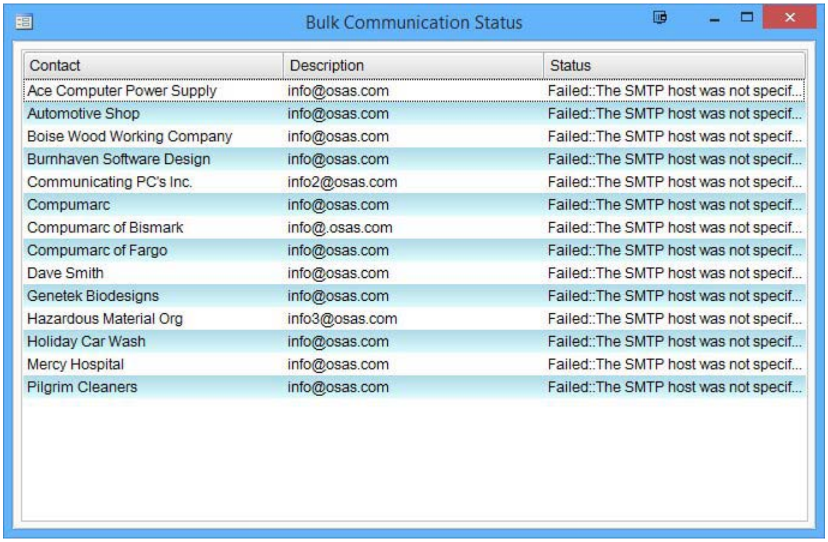
    - Click **Reset** to reset all fields to their default values.
    - Click **OK** to generate and send the bulk communication.

    CRM sends emails and faxes directly through your email system using MAPI-compatible clients and the Fax/Mail Transport Protocol.

    If you are sending an email message or a fax, messages may appear depending on your email client after you click **Send** to alert you that a program (CRM, in this case) is attempting to access your email system to send a message. This is a routine message designed to help keep your email information secure. Click **OK** or **Yes** to grant CRM access to the email system and close the message boxes.

    When you generate a Print (mail merge), clicking **Send** exports contact and message information to a source .tmp file, links that file to a new or existing Microsoft® Word® document (if specified), and performs the merge to create form letters (if an existing document was specified). See Creating Bulk Communications (page 4-61) for more information on this processing.

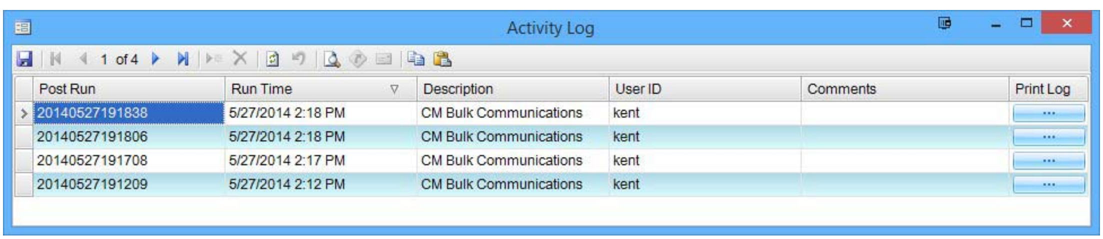
When the bulk communication has finished sending a **Bulk Communication Status** screen will appear, giving the status of the communication with each contact.



Contact	Description	Status
Ace Computer Power Supply	info@osas.com	Failed::The SMTP host was not specif...
Automotive Shop	info@osas.com	Failed::The SMTP host was not specif...
Boise Wood Working Company	info@osas.com	Failed::The SMTP host was not specif...
Burnhaven Software Design	info@osas.com	Failed::The SMTP host was not specif...
Communicating PC's Inc.	info2@osas.com	Failed::The SMTP host was not specif...
Compumarc	info@osas.com	Failed::The SMTP host was not specif...
Compumarc of Bismark	info@.osas.com	Failed::The SMTP host was not specif...
Compumarc of Fargo	info@osas.com	Failed::The SMTP host was not specif...
Dave Smith	info@osas.com	Failed::The SMTP host was not specif...
Genetek Biodesigns	info@osas.com	Failed::The SMTP host was not specif...
Hazardous Material Org	info3@osas.com	Failed::The SMTP host was not specif...
Holiday Car Wash	info@osas.com	Failed::The SMTP host was not specif...
Mercy Hospital	info@osas.com	Failed::The SMTP host was not specif...
Pilgrim Cleaners	info@osas.com	Failed::The SMTP host was not specif...

- Click **Preview** to view the contacts included in the selection criteria.
- Click **Activity** to display the Activity Log to view communication activity.

Activity Log Dialog Box



Post Run	Run Time	Description	User ID	Comments	Print Log
20140527191838	5/27/2014 2:18 PM	CM Bulk Communications	kent		...
20140527191806	5/27/2014 2:18 PM	CM Bulk Communications	kent		...
20140527191708	5/27/2014 2:17 PM	CM Bulk Communications	kent		...
20140527191209	5/27/2014 2:12 PM	CM Bulk Communications	kent		...

The **Activity Log** dialog box appears when you click **Activity**. The Activity Log dialog box tracks all post activity for administrative purposes. The system assigns each post a run ID.

Post Run - The system generated number used to identify the post appears.

Run Time - The date and time the Bulk Communication was made appear.

Description - The Bulk Communication description appears.

User ID - The user who performed the Bulk Communication appears.

Comments entered for the Bulk Communication appear.

Print Log - This feature is not available for this function.

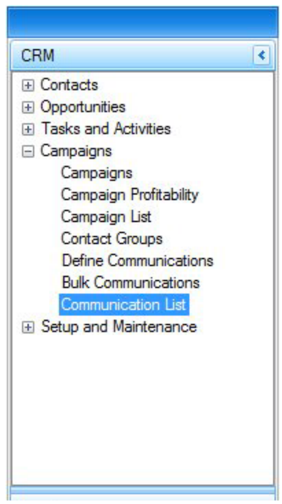
Producing a Bulk Communication List

Print the Bulk **Communication List** to view and verify the Bulk Communication information you entered in the Setup and Maintenance **Bulk Communication** function.

Follow these steps to print the **Communication List**:

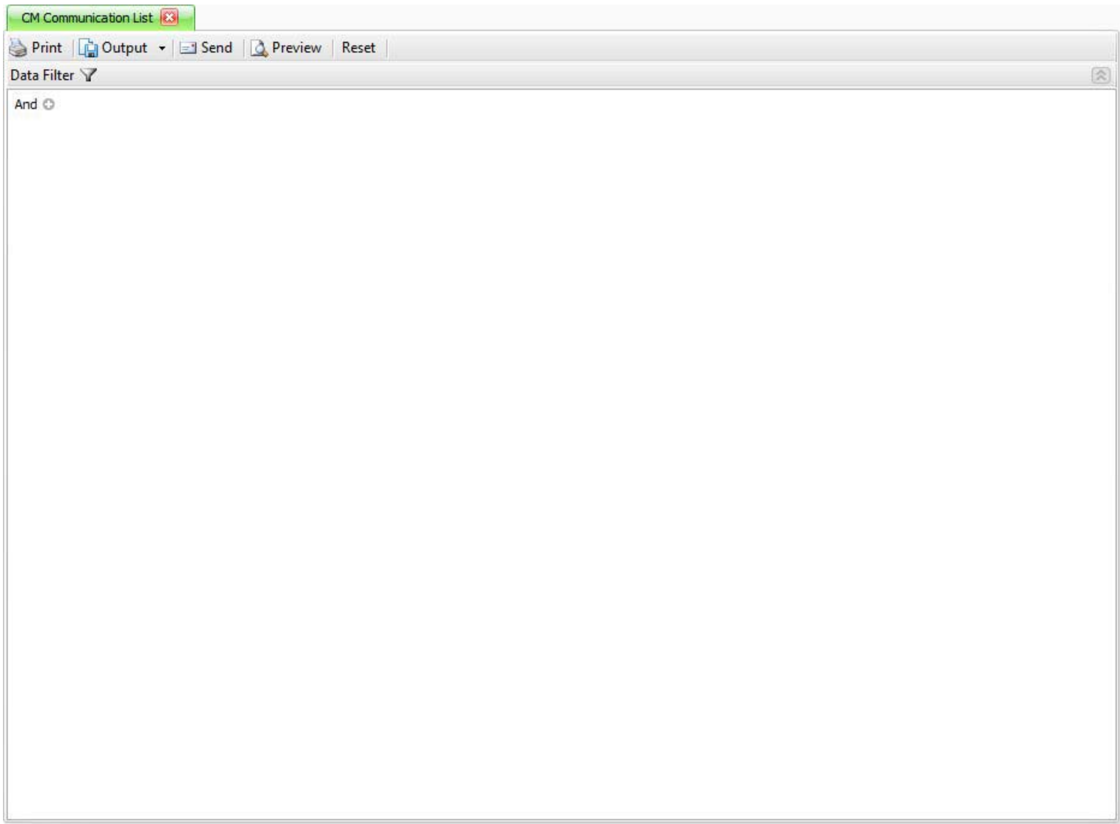
1. Select **Communication List** from the **Campaigns** menu.

Communication List Menu



2. The **Communication List** screen appears.

Communication List Screen



3. Use the **Data Filter** area at the top of the screen to select the criteria to use to filter information that appears on the list. Only records matching the criteria you enter are printed. Leave this area blank to print all information. See the Reporting section in the General Information guide for more information on filtering and outputting reports.

4. Select command button:

Command Buttons

Name	Description
Reset	Set all fields to their defaults.
Preview	Preview the report on your monitor.
Output	Output the report as a .pdf file and save it.
Send	Email the report with the report attached as a .pdf file.
Print	Print the report.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Bulk Communication List

Sample Comp with CRM
Communication List

PAGE 1

Report Filter

Type	**Description** / **Subject** / **File Name**	**Body**
E-mail	E-Mail Spring Promo	[ContactName] [Addr1] [City], [Region] [PostalCode] We have a special promotion on additional user licenses. From April 1st through June 30th you will get 2 user licenses for the price of one user. Please contact your regional sales rep for more details. Thank you Open Systems Sales Staff

***** End of Report *****

5/30/2012 2:45 PM kenthe