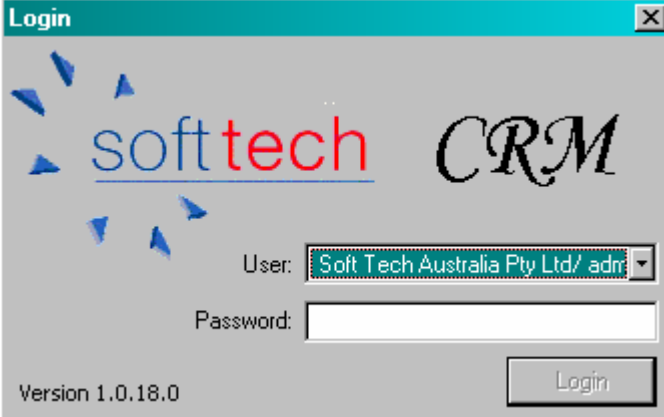




## **CRM Module**

**July 2007**

## Drop Down Log In List



Version 1.0.18.0

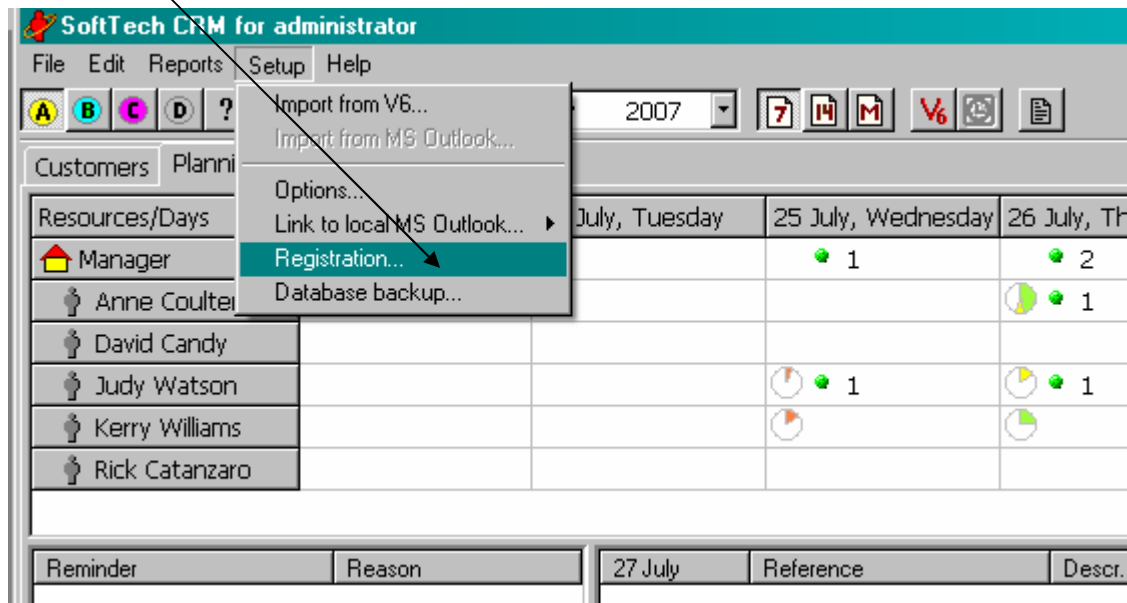
**The Company Name will appear as the top level user, followed by all Staff that have been included.**

**All users enter their password to access the module.**

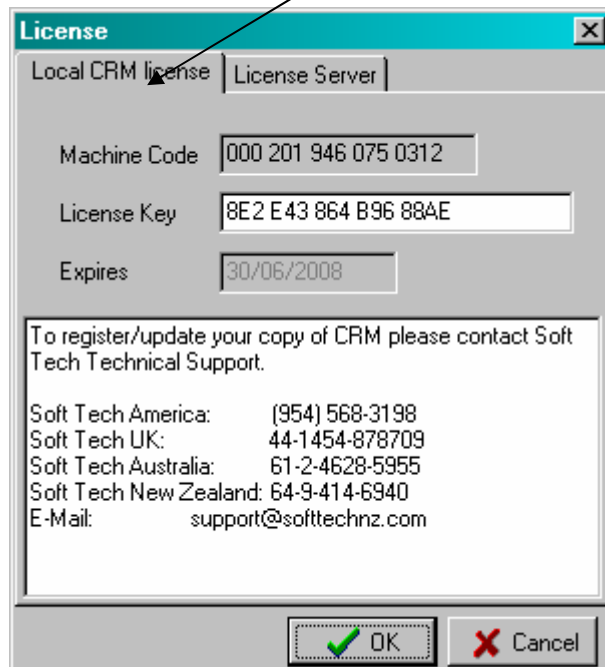
**Only staff (not administrator) can have links to MS Outlook created.**

The Software requires a License key to enable use. This key can be obtained by ringing Soft Tech Australia on 02. 4628 5955 or 1300 139 980.

You will be asked for your machine code. To find the machine code, click on the Setup\Registration link:



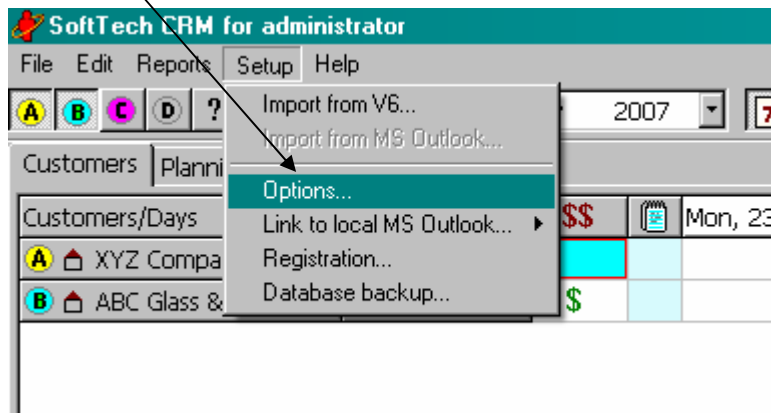
The Machine Code can be found on the Local CRM License tab.



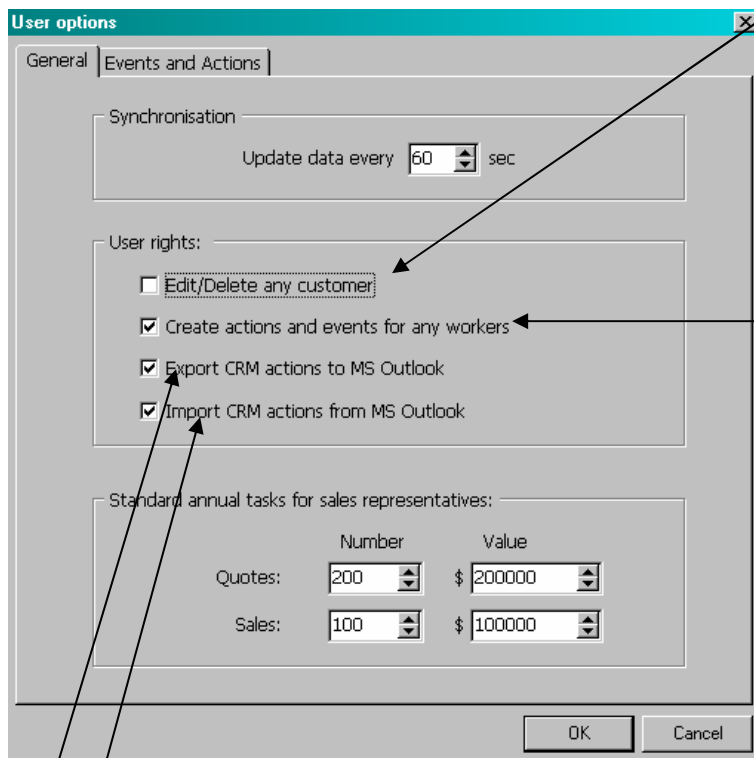
## Setup Options Dialog

This option is only available to the Administration User.

Go to Setup\Options



## General Tab - Addition of User rights



Edit/Delete any customer, when checked any staff member logged in will be able to make changes to a customer even though they may not be the assigned salesperson for that customer.

Create actions and events for any workers, when checked a logged in user will be able to create activities and events for other workers. As an example, a salesman could create an activity for a 2<sup>nd</sup> salesman in respect of a customer. The 2<sup>nd</sup> salesman will see the activity in his(her) diary, but it will not be exported to Outlook until the activity is opened and re-saved with the "link to local MS Outlook" box checked.

Export CRM actions to MS Outlook – allows users to export from CRM into their local MS Outlook.

Import CRM actions from MS Outlook – allows users to import from CRM into their local MS Outlook.

## Events and Actions Tab Set Defaults

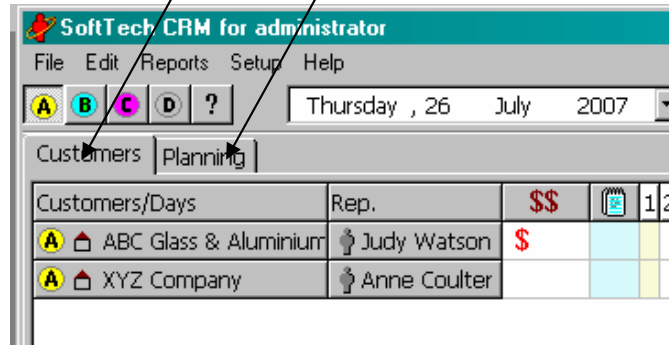
The screenshot shows the 'User options' dialog box with the 'Events and Actions' tab selected. The 'Default contact frequency' section has four dropdown menus for Customer A, B, C, and D. Customer A is set to 'every 2 weeks'. The 'On import, generate action on change of quote status' section has a table with columns for 'Action category', 'Assign to', and 'Lag days'. The 'New item' row is highlighted, showing 'Phone call' as the action category, 'sales person' as the assign to, and '3' as the lag days. Other rows include 'Accepted', 'In production', 'Ready for dispatch', 'Completed', and 'Invoiced'. At the bottom, there is a field for 'Ignore quotes older than' set to '6' months. 'OK' and 'Cancel' buttons are at the bottom right.

Action category	Assign to	Lag days	
New item	Phone call	sales person	3
Accepted	Phone call	sales person	0
In production	<unknown>	<nobody>	0
Ready for dispatch	Phone call	employee	0
Completed	<unknown>	<nobody>	0
Invoiced	Chase Payment	accountant	30

Set Defaults for contact frequency for customer Types.

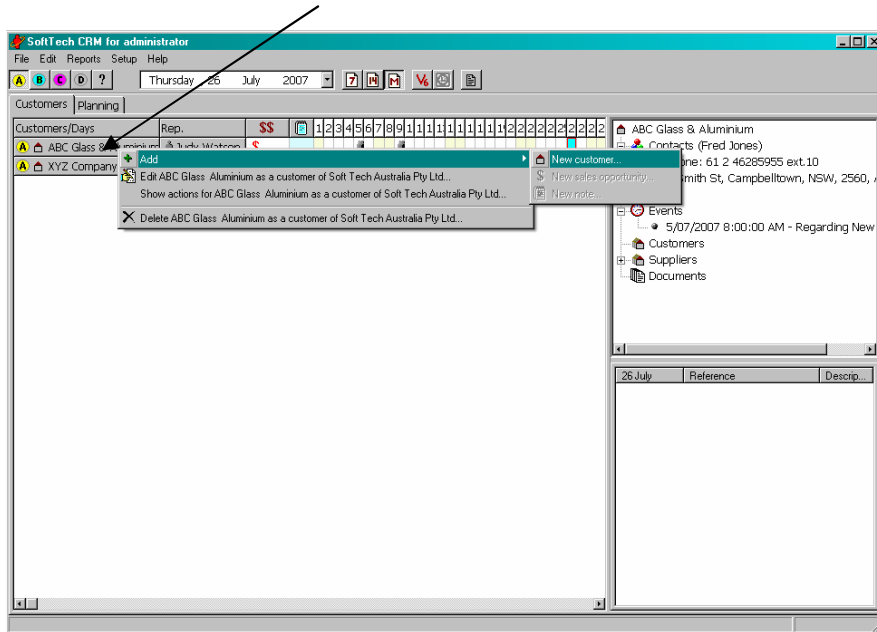
Set Default actions to be performed on import and change of status for New Items, Accepted, In production, Ready for despatch, Completed and Invoiced quotes.

The system has two main tabs, Customers and Planning, each are divided into several segments.

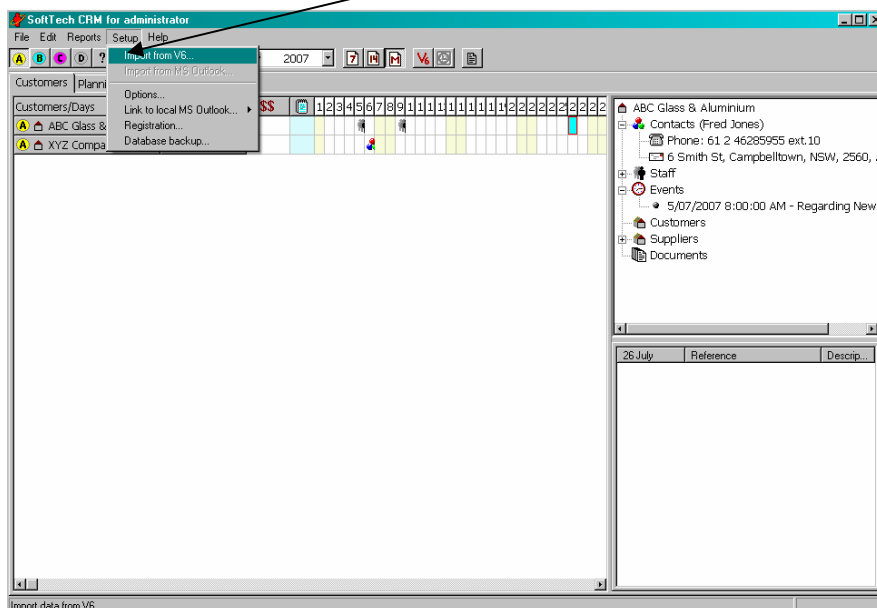


## Customers

Can be added by right mouse menu on the Customer/Days tab,



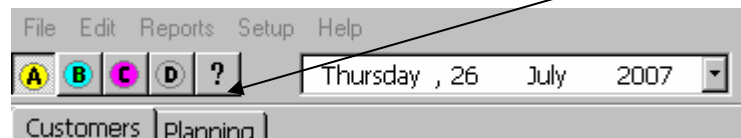
or automatically imported from V6 using the Setup\Import from V6 option, along with all customer contact details and associated sales rep details currently stored in V6.



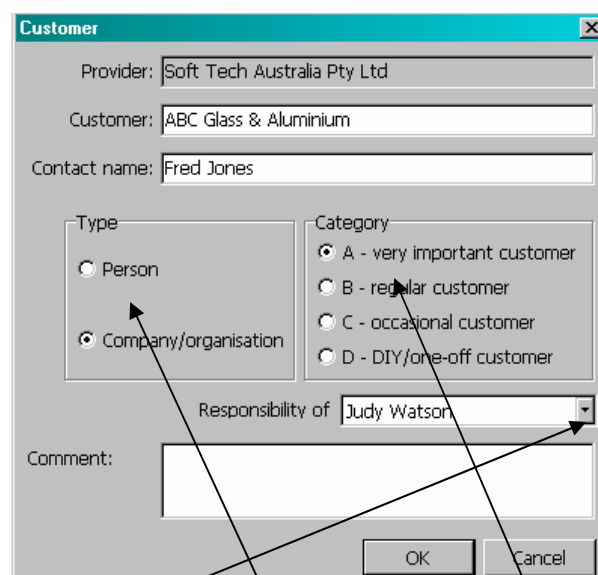
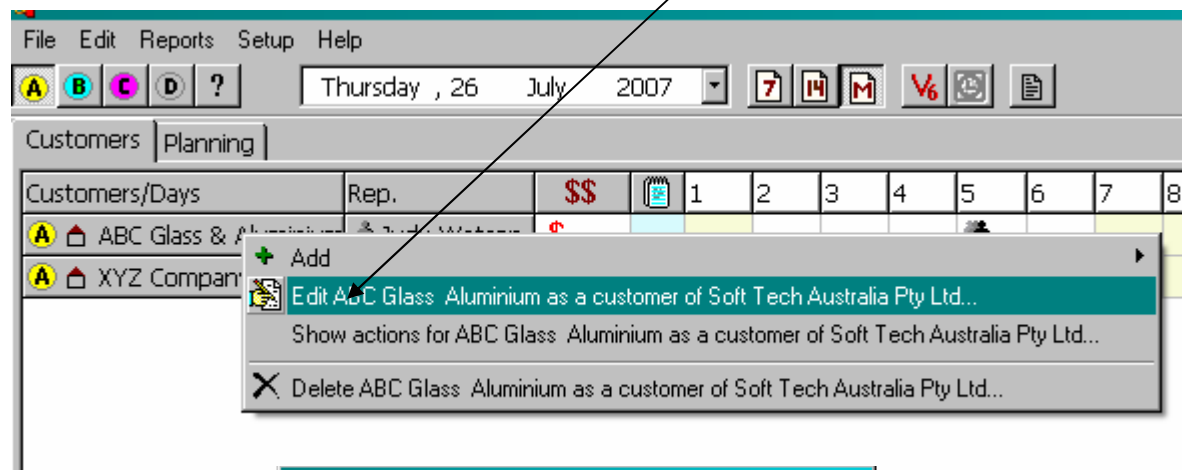
When a quote is imported it has an associated sales person (that may be different to that stored in the V6 Customer file). When an event/activity is created based upon an actual quote, the sales person attached to the V6 quote will be given the activity (this can be changed). If no sales person is associated with the V6 quote, the sales person associated with the V6 customer will be used.

### Customer Type

Customers are viewed according to their Category status. E.g. A,B,C, or D customers. When customers are first imported, the CRM system is unaware of the Type and Category. Until a Category is selected these customers are viewed by selecting the “?” filter on the main menu.



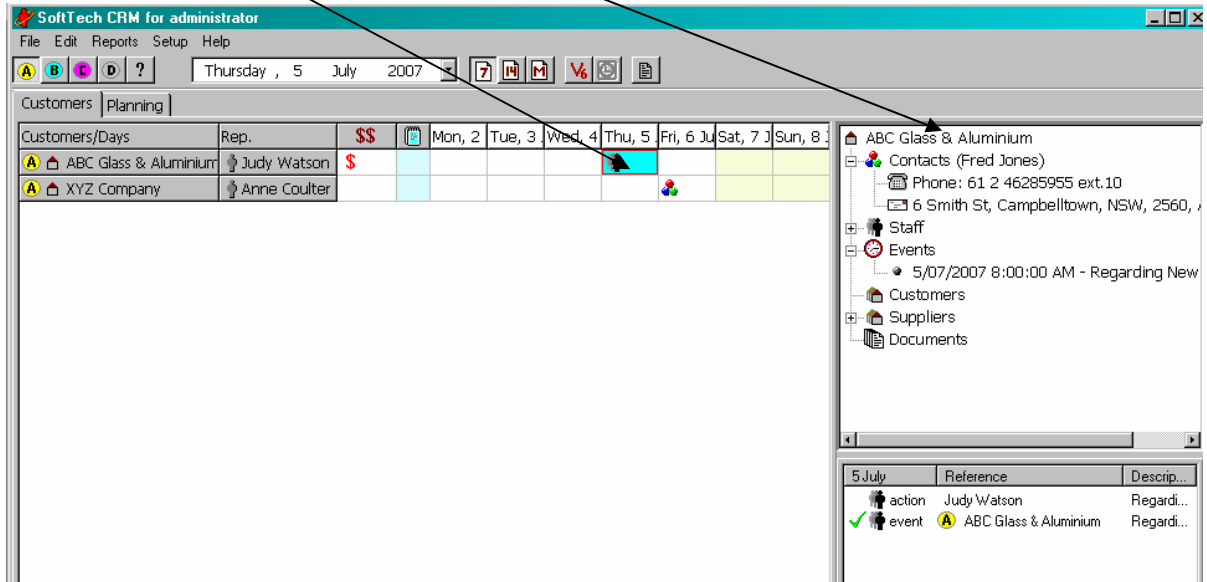
To edit a customer type, right mouse click on the customer name and choose Edit



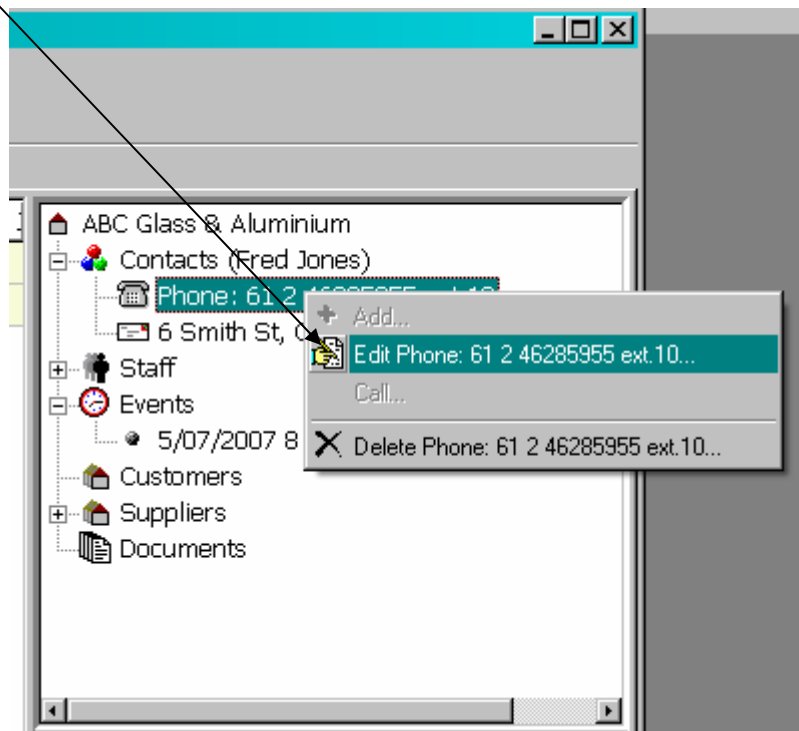
At this stage, you can choose the Type of customer and Category .

The Responsibility drop down allows one of the staff to be allocated to this customer. In most cases Events / Activities for this Customer will be linked to this default person(sales person).

To edit other items (Contacts, Events, Suppliers, Documents) click the cursor in a cell (eg Thursday 5<sup>th</sup> July for that customer) in the daily table, the customer information is displayed in the right hand top section of the screen.

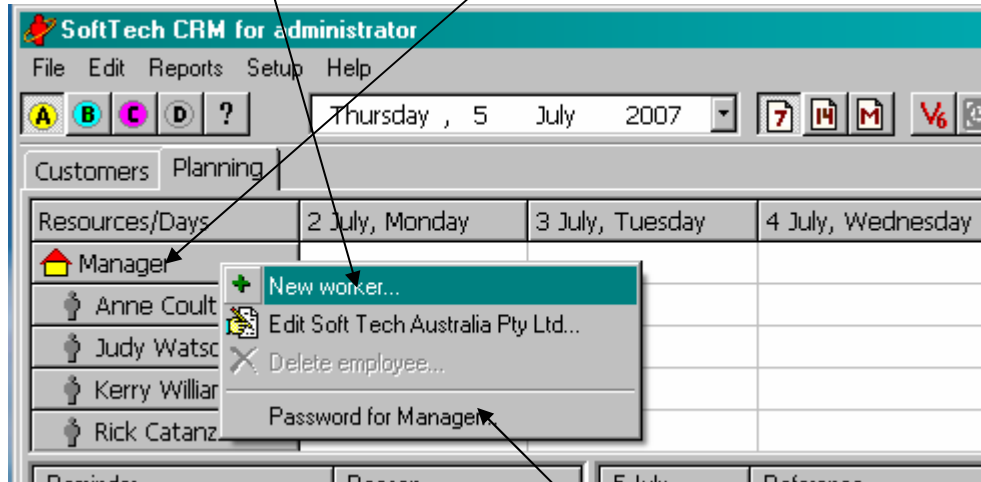


Point to any item in the tree view and use right mouse menu to add, edit, delete items. In the case of documents a link to any document (.txt, .doc, .xls, .csv, .bmp, .gif, .jpg, .html) can be made. **Note: when the document is deleted, it is only the link to the document that is removed, the document remains wherever it is stored.**



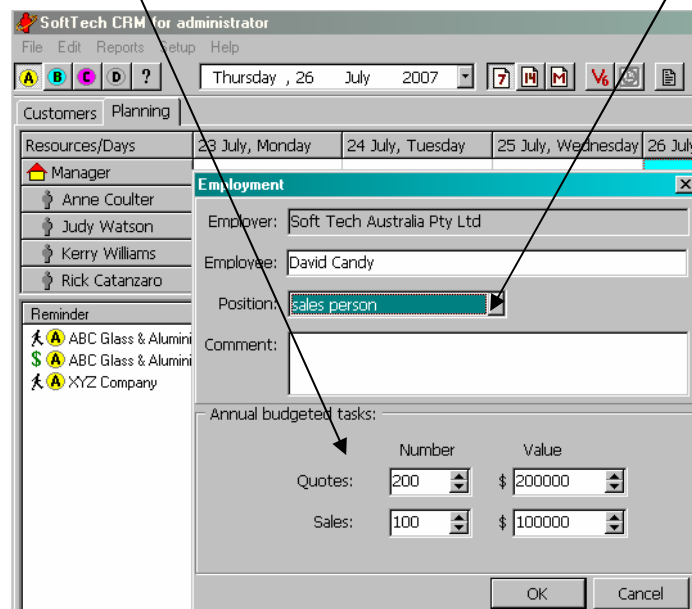
**Planning – Changes to the planning tab can only be made by the administrator.**

This tab displays each Sales Person as imported from V6 or added sperately. To add a new Worker (Salesman, Admin, etc etc) point to the Manager cell in the Resources column. Right mouse click and select New worker...



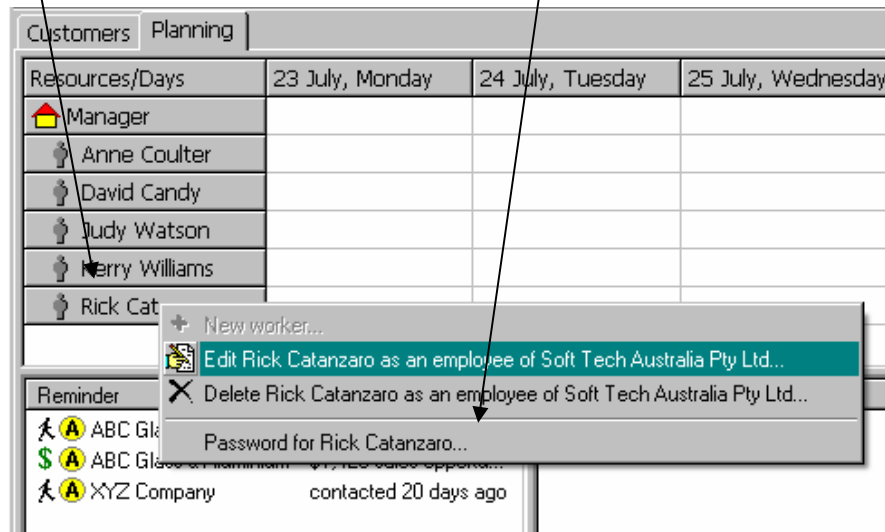
Note, it is also possible to change the password for Planning, in this case the Manager has been edited to show the company name “Soft Tech Australia Pty Ltd” Any new password will need to be confirmed.

When the new worker is added, if it is a Sales Person (selected from drop down list) another section appears where the expected budget for this person is added. See also User Options.



## Edit a Worker

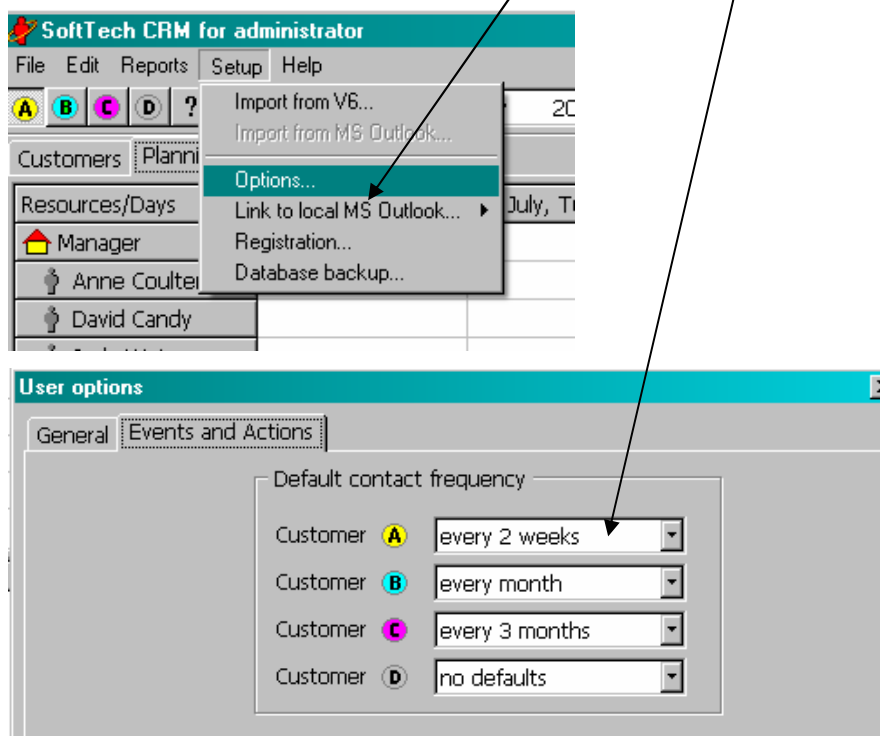
Point to the worker in the Resources list on the Planning tab, right mouse click and select edit, it is also possible to change password for this worker. **Note: this can only be done by the relevant worker or the Administrator.**



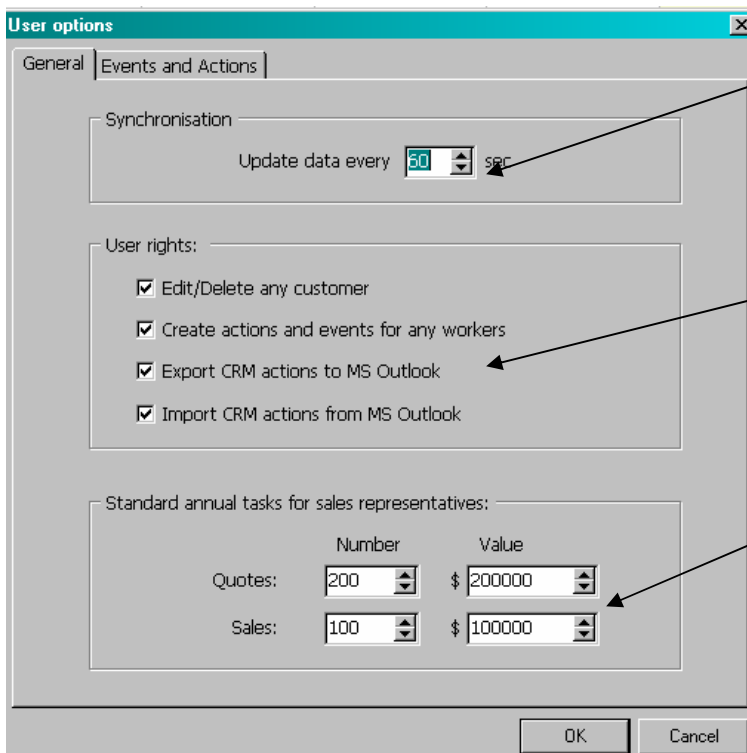
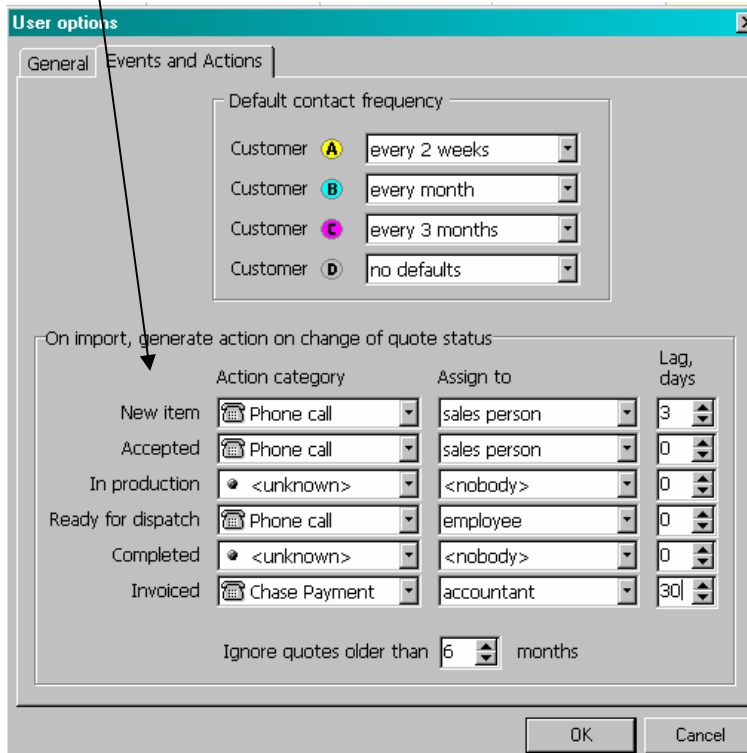
## User Options

Events can automatically be created if an appropriate contact has not been made within the desired period. In the example below a Customer of type “A” will have an event created if no contact has been made in the last 2 weeks. This event will appear in a list of Reminders on the Planning screen. When the event is handled, i.e an action is created on a specific date/time for a particular person, the reminder event is removed.

To access these, go to the Setup\Options tab



On import from V6, actions can be automatically generated on Quote Status changes. These are created when a V6 Quote status change occurs. The action is added for a Role (accountant, manager, sales rep) or an actual resource. Both appear in the drop down list. The lag is the number of days delay before the action is added to the daily calendar.



The General tab includes the synchronization time for each logged on user (60sec as default),

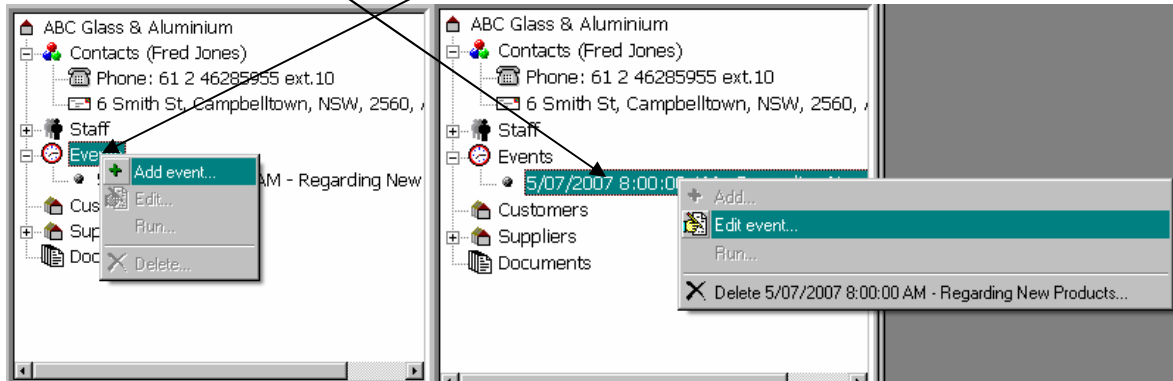
User Rights

and also the default Number of Quotes/\$TotalValue, and expected Sales for each Sales Rep.

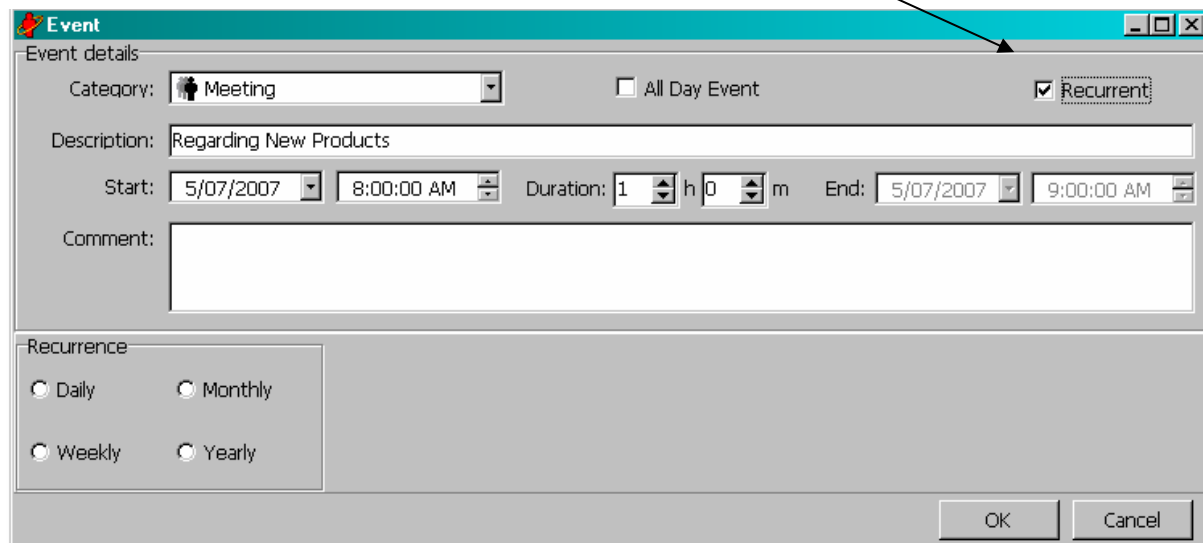
## Events

When an Event is linked to a customer, it may be either a one off event or recurring event (with various frequencies, daily, weekly, monthly, annually). Depending on where the cursor has clicked in the daily chart (top half of CRM screen) for the Customer, the defaults on the event editor will change.

To add an event, right mouse click on events and click Add event. To edit an event, right mouse click on the event and click Edit event.



The bottom section of the editor is only visible when “Recurrent” is ticked. The event can then be noted as a re-occurring event either daily, weekly, monthly or yearly.



**Event**

Event details

Category: Meeting  All Day Event  Recurrent

Description: Regarding New Products

Start: 5/07/2007 8:00:00 AM Duration: 1 h 0 m End: 5/07/2007 9:00:00 AM

Comment:

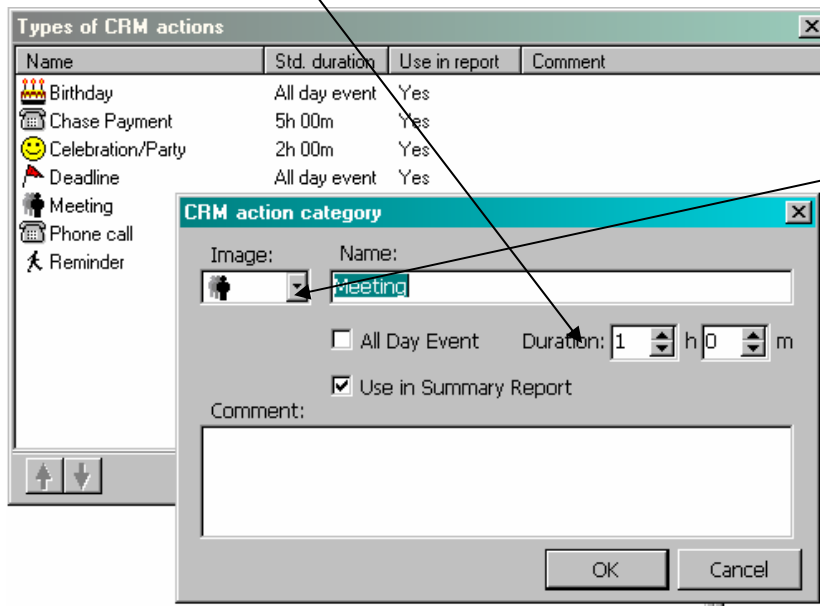
Recurrence

Daily  Monthly

Weekly  Yearly

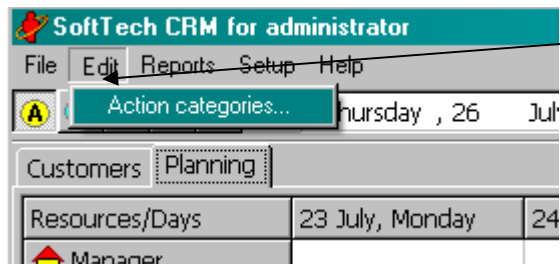
OK Cancel

Any event is based upon an “Action Category”. The action category gives a default duration so when an event “meeting” is created 1hr is allocated, compared to a phone call event that allocates 15minutes.

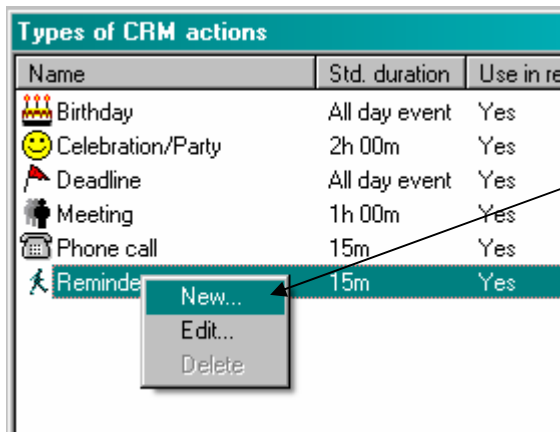


Events as a system resource can be added, and linked to an image icon.

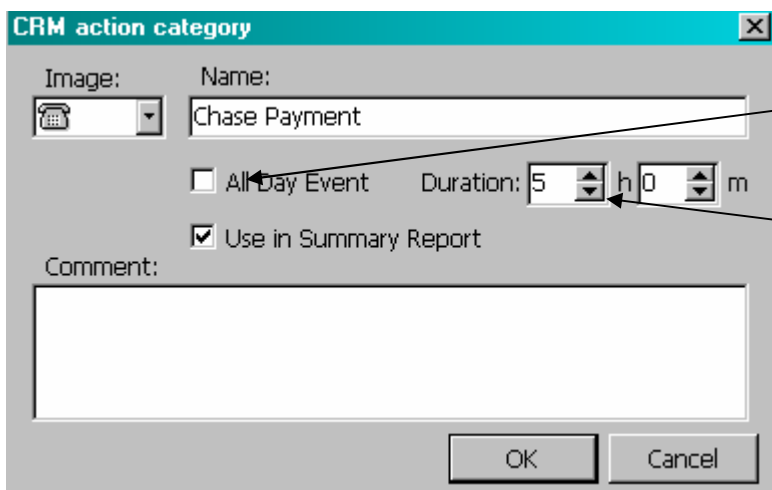
**The type of event/activity can be edited along with the default duration which is applied when an actual event/activity is created for a person to complete.**



To edit or add a CRM action category, select the “Edit” menu and “Action categories”.



Select an existing category and use right mouse menu to either Edit or Add.



Set the duration to “all day” or some desired period.

Type in desired Hr or min, use up/down arrow to shift in 5min steps.

**Non Reported Activities** – When the “Use in Summary Report” check box is set to ON, the activities are detailed in the Salesman activity report.

Prospecting and Sales Meetings should be tracked but Birthdays and other trivial events should not be.

CRM action category

Image: Name: Chase Payment

All Day Event Duration: 5 h 0 m

Use in Summary Report

Comment:

OK Cancel

SoftTech CRM for administrator

File Edit Reports Setup Help

Friday, 27 July 2007

Customers: Planning

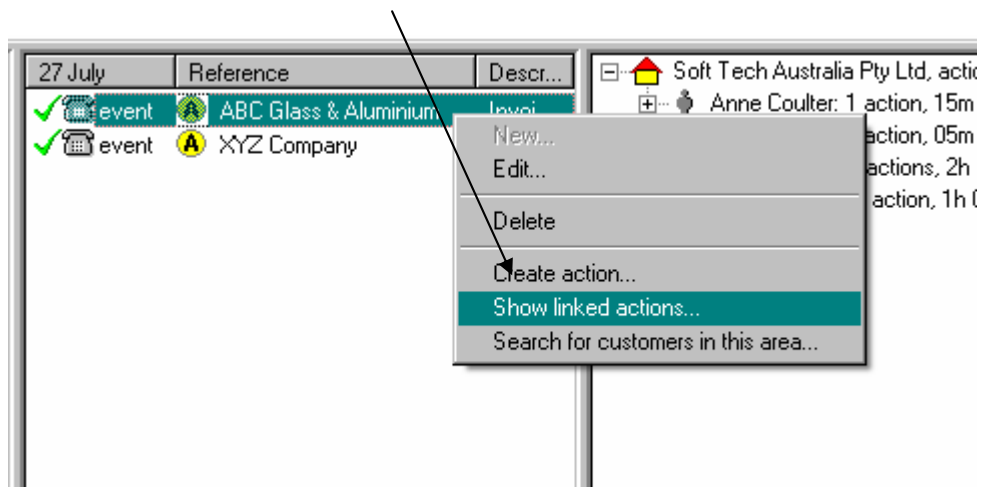
Resources/Days	23 July, Monday	24 July, Tuesday	25 July, Wednesday	26 July, Thursday	27 July, Friday	28 July, Saturday	29 July, Sunday
Manager			1	2	1		
Anne Coulter				1	1		
David Candy							
Judy Watson			1	1	1		
Kerry Williams							
Rick Catanzaro							

Reminder	Reason	27 July	Reference	Descr...
ABC Glass & Aluminium	\$1,425 sales opportu...	✓ event	ABC Glass & Aluminium	Invoi...
		✓ event	XYZ Company	Re n...

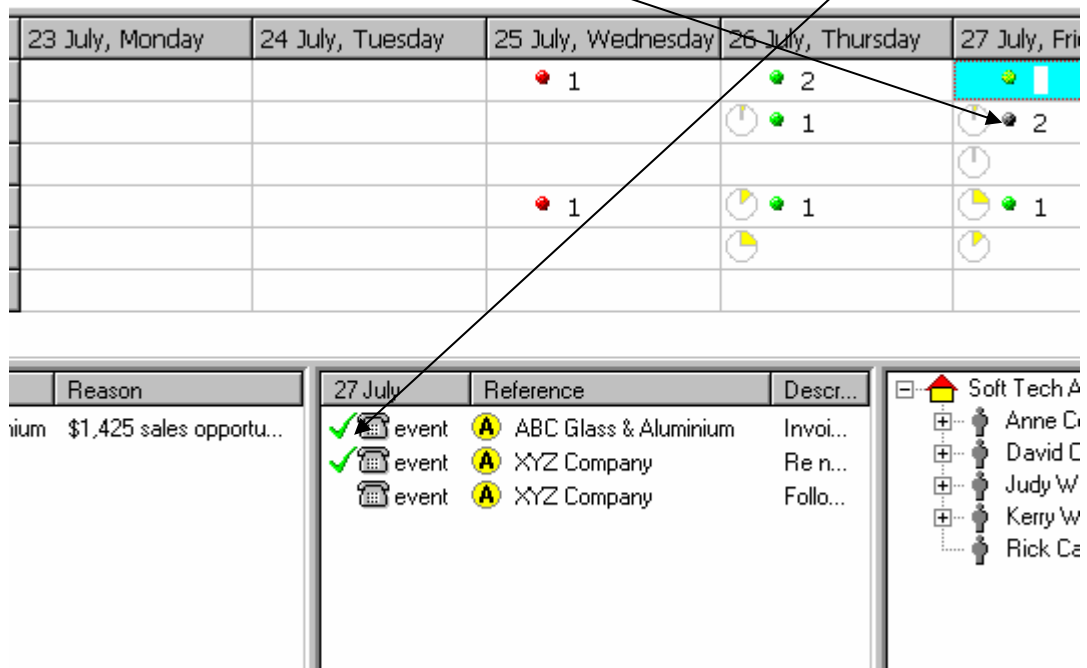
- Soft Tech Australia Pty Ltd. actions for 27/07/2007
  - Anne Coulter: 1 action, 15m
  - David Candy: 1 action, 05m
  - Judy Watson: 2 actions, 2h 00m
  - Kerry Williams: 1 action, 1h 00m
  - Rick Catanzaro:

The simplest way to explain Events versus activities is to view the screen above. The Red or Green Shaded dot in any cell represents the status of Events on that day. In the top row is a summary across all customers, the numeric number represents the number of events.

In the example 27<sup>th</sup> July, there are 2 events and both are Green. This means that each event has an associated activity, see also the central lower sector of the screen, each handled event has a green tick. By clicking on any event in that list the right mouse menu will show all activities (could be more than 1) that are linked to the event..



A Red dot indicates the Event has not been handled, and it does not have a tick in the lower sector of the screen. If the dot is shaded, there is a mixture of Handled and non Handled events.



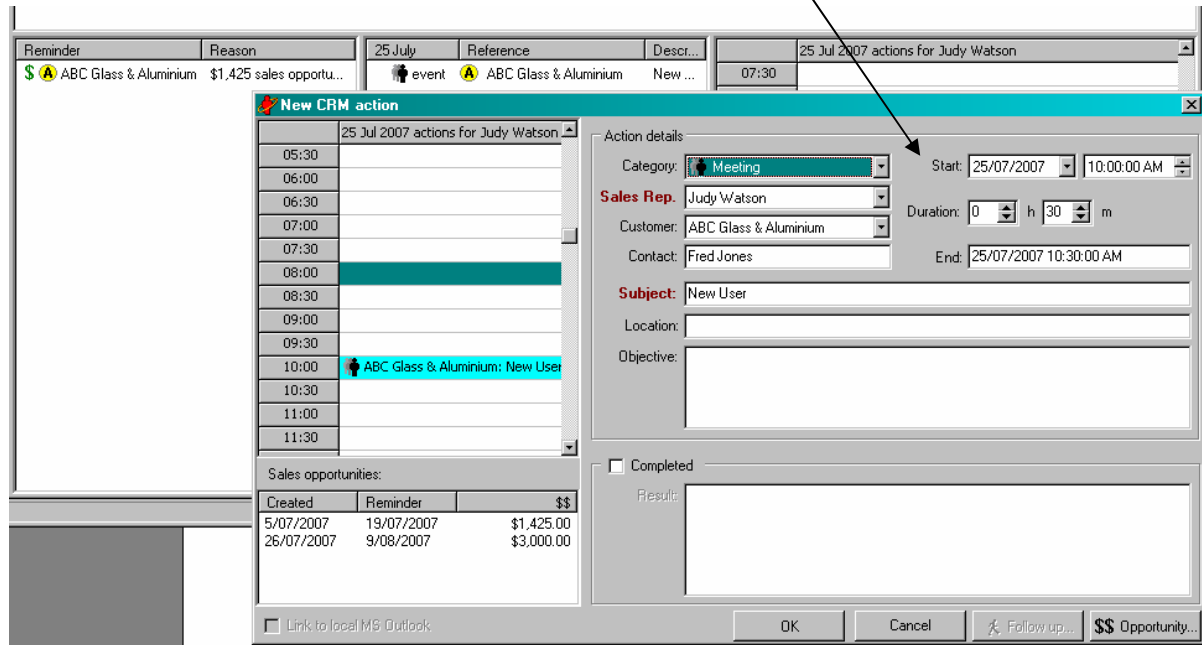
There is a reminder showing in the left lower sector of the screen, this is a system generated prompt based on the fact that the particular customer has not been contacted within the desire frequency (see User Options). The reminders are filtered by Customer Type from the main menu bar.

The screenshot shows the 'SoftTech CRM for administrator' interface. At the top, there is a menu bar with 'File', 'Edit', 'Reports', 'Setup', and 'Help'. Below the menu bar is a toolbar with various icons. The main area is divided into two sections: 'Customers' and 'Planning'. The 'Planning' section shows a calendar for the week of July 23rd to 26th, 2007. The calendar has columns for each day and rows for resources: Manager, Anne Coulter, David Candy, Judy Watson, Kerry Williams, and Rick Catanzero. Clock dial icons are present in several cells, indicating planned activities. Below the calendar is a 'Reminder' section with columns for 'Reminder', 'Reason', '27 July', 'Reference', and 'Descr...'. A reminder is listed for 'ABC Glass & Aluminium' with a reason of '\$1,425 sales opportu...'. The reminder details show three events for '27 July' with references to 'ABC Glass & Aluminium', 'XYZ Company', and 'XYZ Company'.

The Clock dial shows how much time of a persons day is allocated to planned activities. Although it is a little hard to see, green sectors are completed activities, red are uncompleted and in the past, and yellow represents activities in the future that are uncompleted.

25 July, Wednesday	26 July, Thursday	27 July, Friday
1	2	3
	1	2
		1
1	1	1
1	1	1

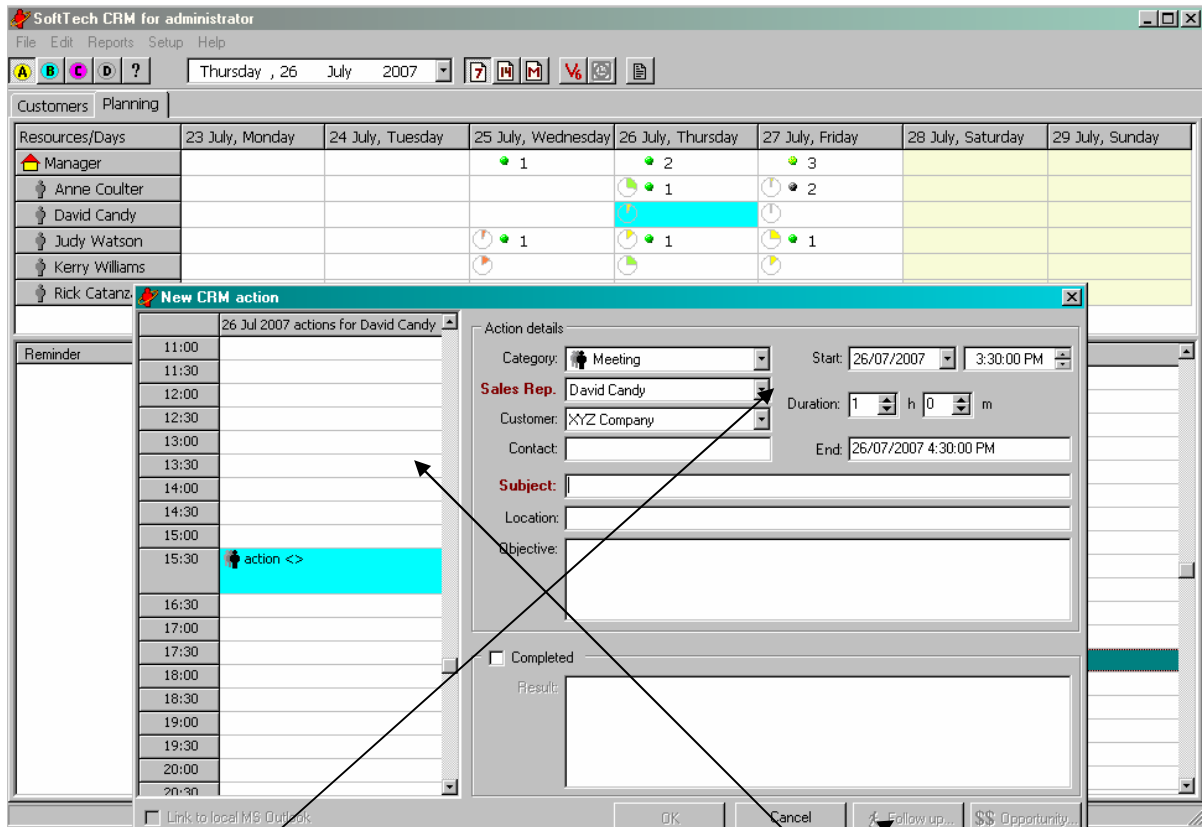
To turn a desired event into an activity, click on the event in the lower screen sector and drag and drop it onto the daily schedule (left lower sector) or onto the desired day in the top sector. In any event the user will be able to change the date, time, person allocated to the activity but the default settings will respond to where the Event is dropped on either of the screen sectors. If the system expects the activity to be associated with a particular sales person and the user drops the event onto a different persons row, the system will ask if the user is sure, and either preset the activity for the new person or alternatively allow the user to change the user associated with the activity.



## Activities

Note that an Event is an action that is desirable to happen, but has not been allocated to a person to do (i.e placed in their daily calendar)

An activity can be created by clicking in the daily calendar and using the right mouse menu to Add. Depending on where the cursor has clicked in the daily chart (top half of CRM screen) for the Planning or for an individual Sales person the defaults on the activity editor will change.

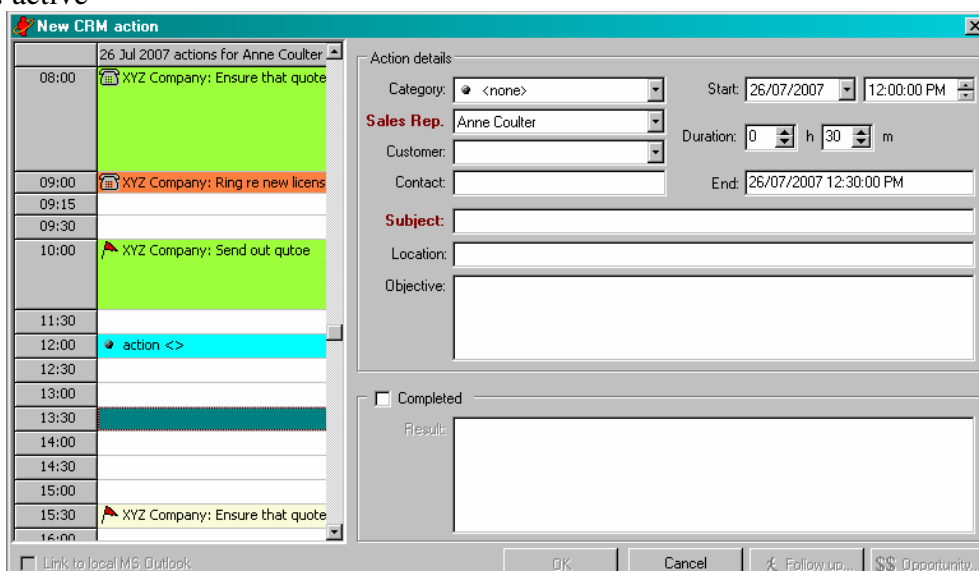


In the screen above the cursor was clicked in the cell David Candy 26<sup>th</sup> July, so the activity is created with those defaults, which can be changed. When a different person is selected in the drop down the activities for that new person are shown in the activity editor (left side of editor). The Customer list in the drop down box is filtered by the "A, B,C,D ?" settings on the main screen. The OK button becomes active when a Subject line is added.

It will also be possible to add linked Follow-Up activities by clicking that button (in the screen shot it is shown greyed out). In effect the user will have two activities open, both need to be saved.

In all activity screens, including daily diary, the shading indicates the current status of each activity.

**Turquoise:** the selected activity, **Green:** completed, **Red:** incomplete and past due date/time  
**Yellow:** active



## Review of Main Screen

The screenshot shows the 'SoftTech CRM for administrator' interface. At the top, there's a menu bar (File, Edit, Reports, Setup, Help) and a date selector (Friday, 27 July 2007). Below this is a 'Customers' and 'Planning' section with a grid showing resources (Manager, Anne Coulter, David Candy, Judy Watson, Kerry Williams, Rick Catanzaro) across days from 23 July to 29 July. The grid uses colored dots and numbers to indicate activity levels. Below the grid are three main panels: a 'Reminder' table with columns for Reminder, Reason, and Date; an 'Events' table for '27 July' with columns for Reference and Description; and a detailed 'Actions' list for 'Soft Tech Australia Pty Ltd. actions for 27/07/2007' showing specific tasks for each worker with time slots and descriptions.

- Reminders, automatically generated, filtered per Customer Type, and by Salesman
- Events and Activity high level summary by worker / salesman. (dot + qty)  
Green = activity created, Red = no activity created, shaded = mixture
- Events list for particular day, green tick if activity created, no tick if no activity created.
- List of Workers, with the scheduled activities for that day.

The screenshot displays the 'SoftTech CRM for administrator' interface. At the top, there is a menu bar (File, Edit, Reports, Setup, Help) and a toolbar with various icons. Below this is a date selector showing 'Thursday, 26 July 2007'. The main area is divided into two sections:

**Resources/Planning Grid:**

Resources/Days	23 July, Monday	24 July, Tuesday	25 July, Wednesday	26 July, Thursday	27 July, Friday	28 July, Saturday	29 July, Sunday
Manager			1	2	3		
Anne Coulter				1	2		
David Candy							
Judy Watson			1	1			
Kerry Williams							
Rick Catanzaro							

**Reminder Table:**

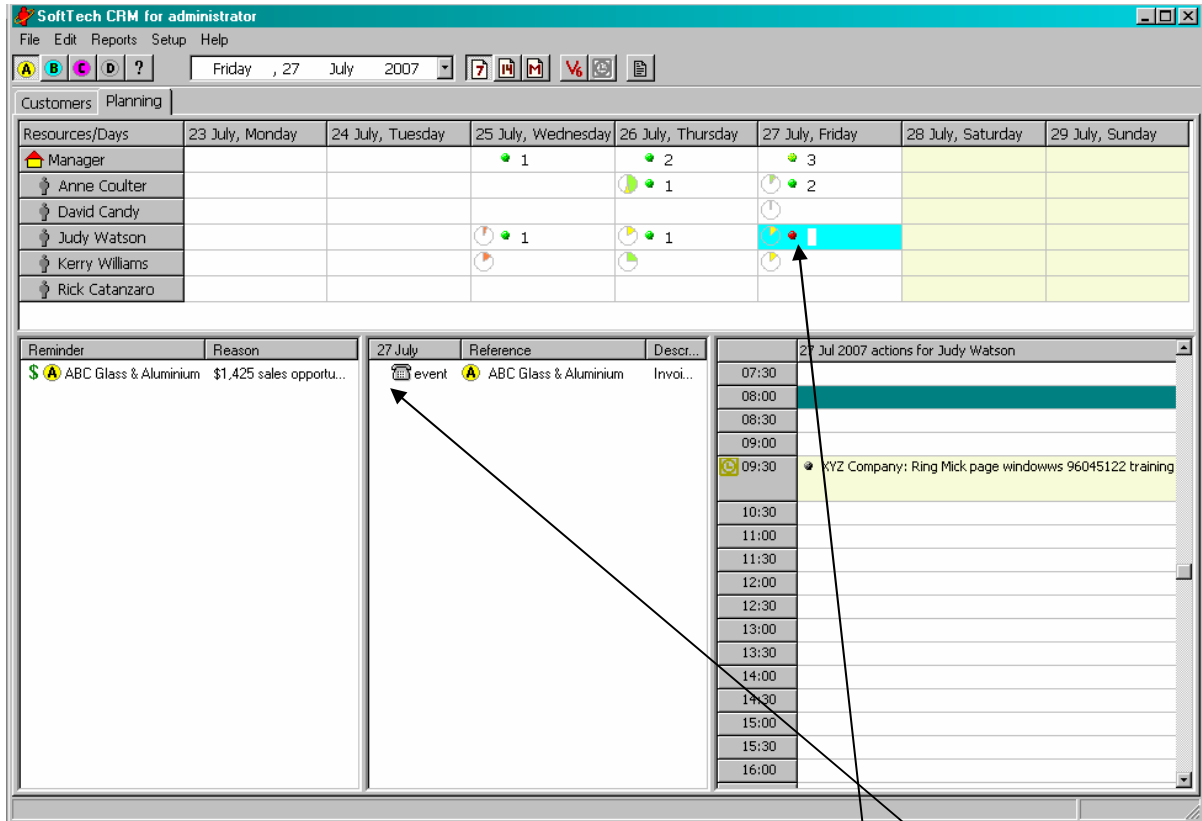
Reminder	Reason	26 July	Reference	Descr...
ABC Glass & Aluminium	\$1,425 sales opportu...	✓ event	ABC Glass & Aluminium	Re S...

**26 Jul 2007 actions for Judy Watson:**

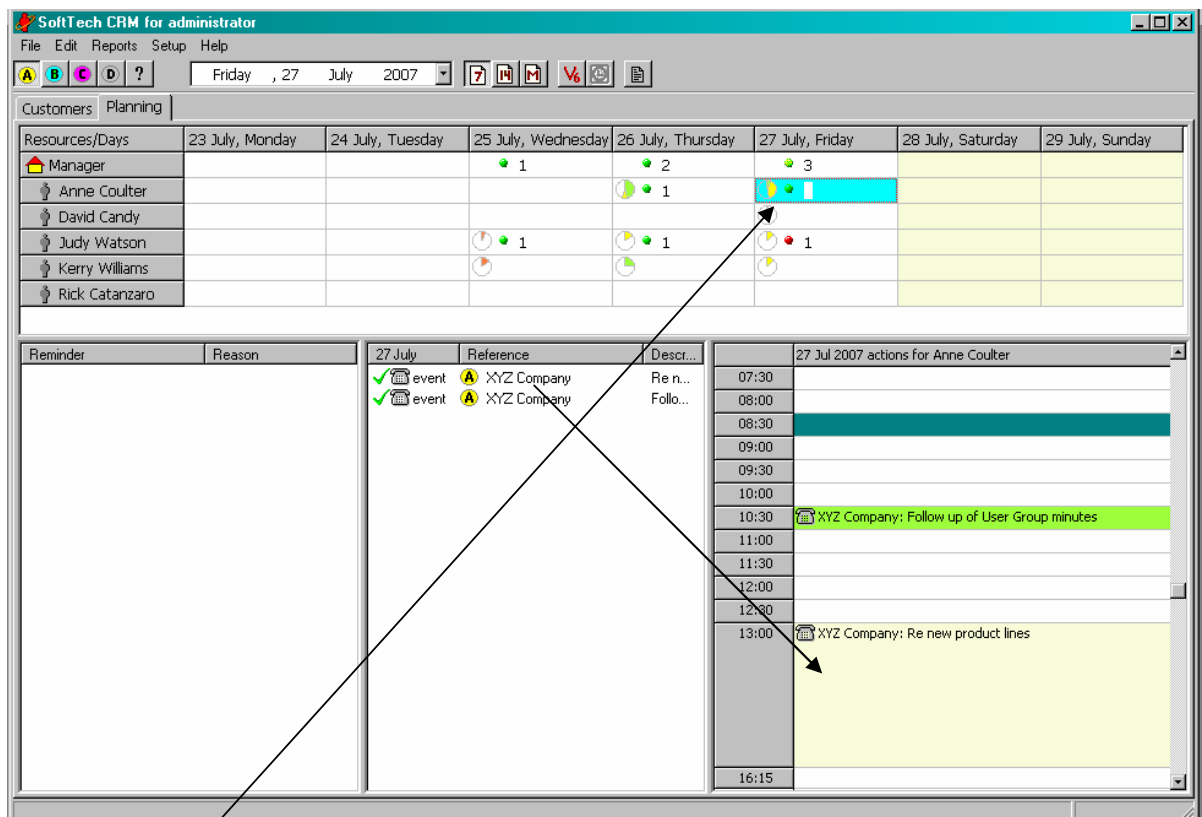
Time	Activity
09:30	
10:00	
10:30	
11:00	ABC Glass & Aluminium: Follow up quotation of 20th July
11:15	
11:30	
12:00	
12:30	
13:00	
13:30	
14:00	
14:30	
15:00	
15:30	
16:00	ABC Glass & Aluminium: Re Special Job
17:00	
17:30	
18:00	

Select the worker (Judy Watson) on the particular day (26<sup>th</sup> July).

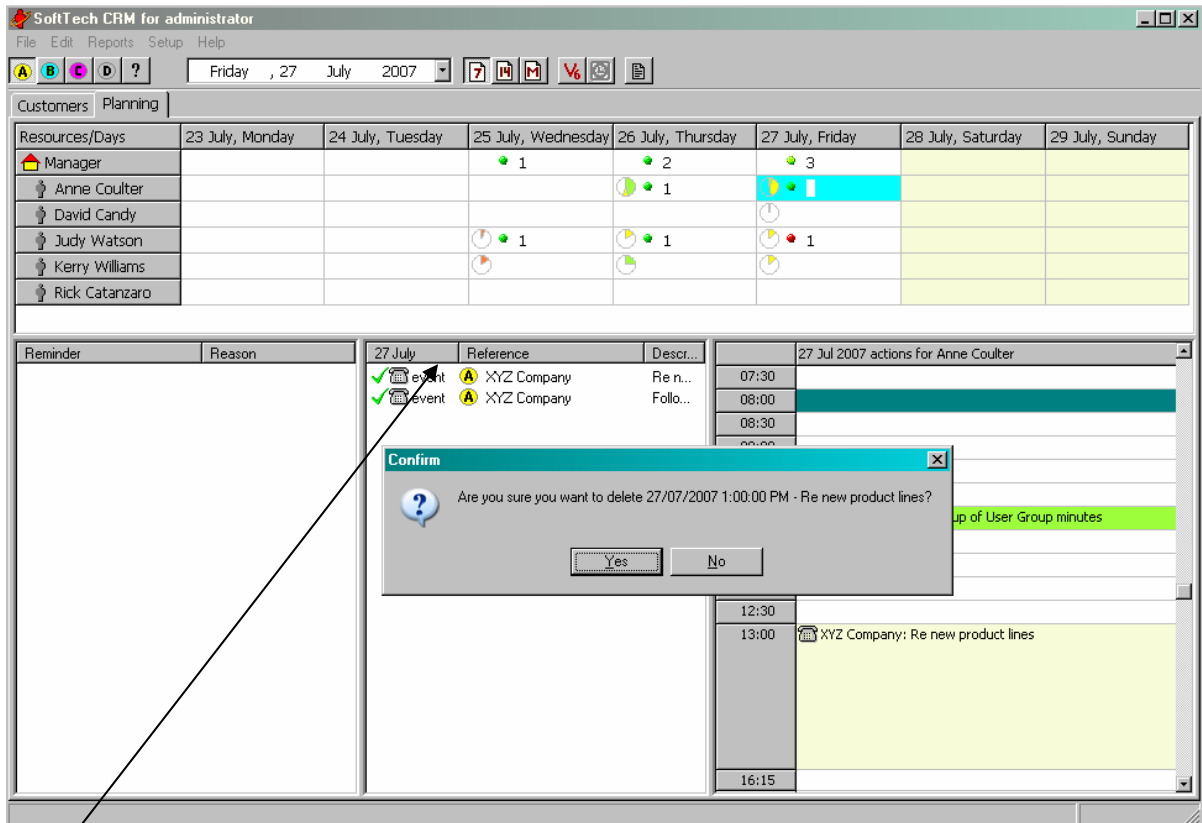
- Shows a reminder that ABC Glass and Aluminium have a sales opportunity of \$1,425.00
- The Event has a green tick which means an activity has been scheduled. In this case at 16.00pm.
- The Red shaded activity in the daily diary indicates the time for this phone call has passed, and as yet has not been checked off as completed.



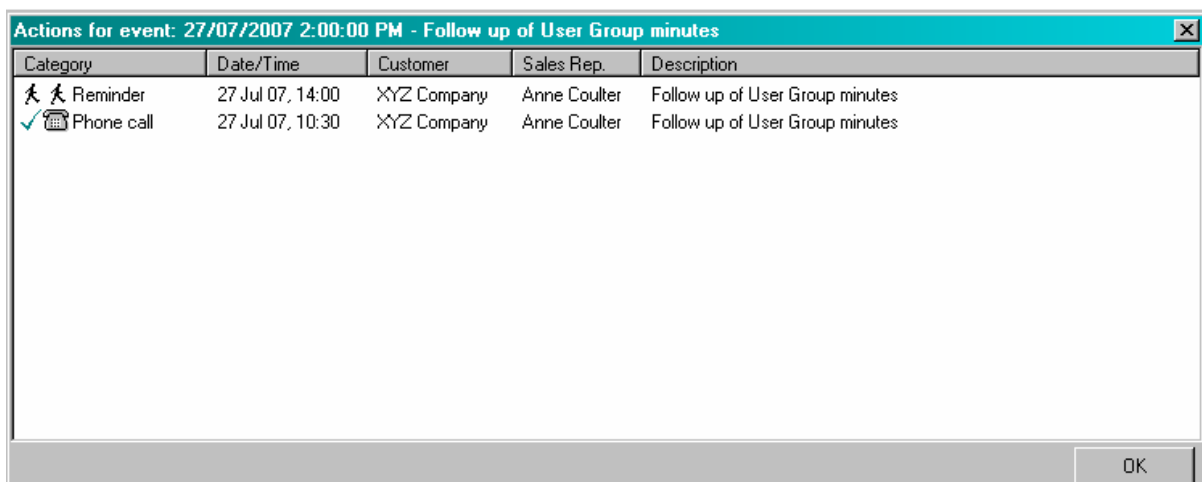
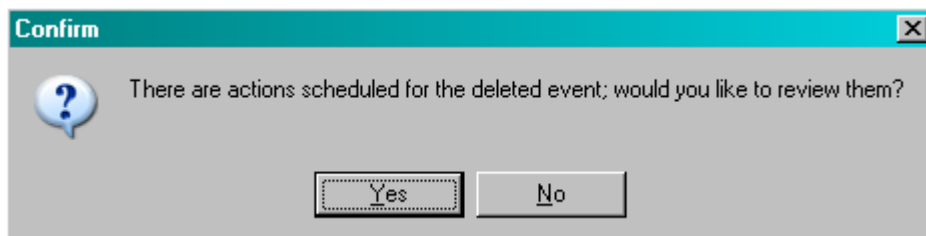
Shows an event for Judy that has not had an activity created. Red dot, no green tick.



Shows an event with a linked activity, note that the time allocated to the activity is shown in the clock face.



- To delete an Event, click on the event, right mouse menu select Delete. If you select Yes, then it is possible to review linked activities to see if these should also be removed (it is optional)

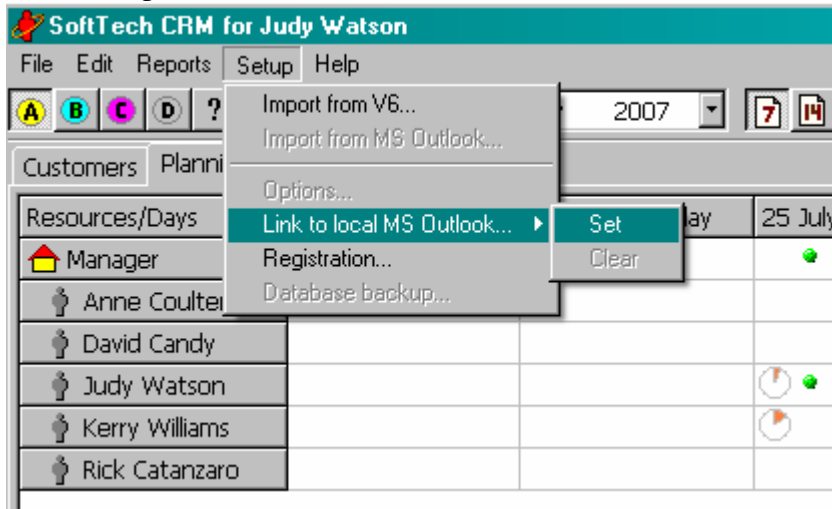


The two linked activities are shown. To delete or edit either, click on the activity in the dialog box, right mouse click and select Edit or Delete from the menu.

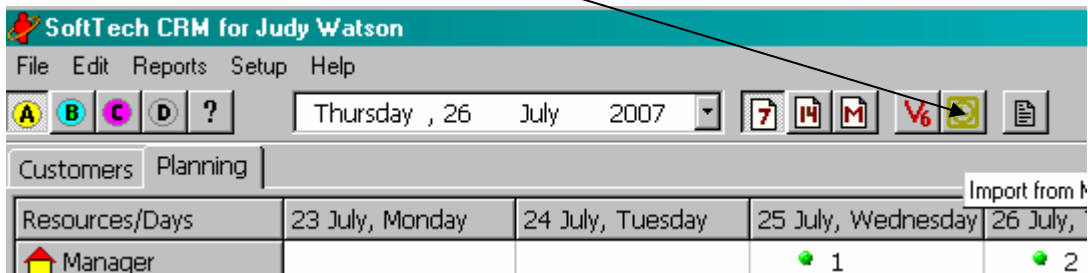
## Link to Local MS Outlook pst file


This link is only available to individual logged on users of CRM, not the Administrator user.

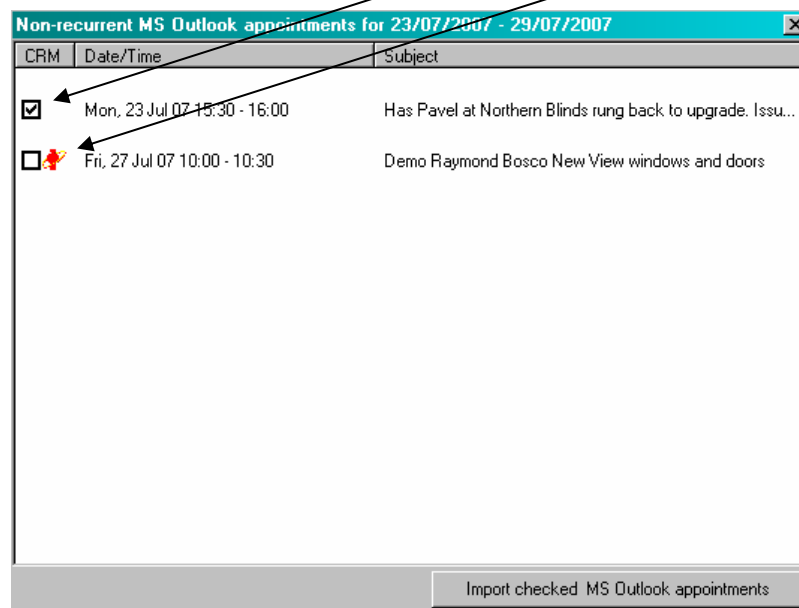
Go to Setup\Link to local MS Outlook\Set



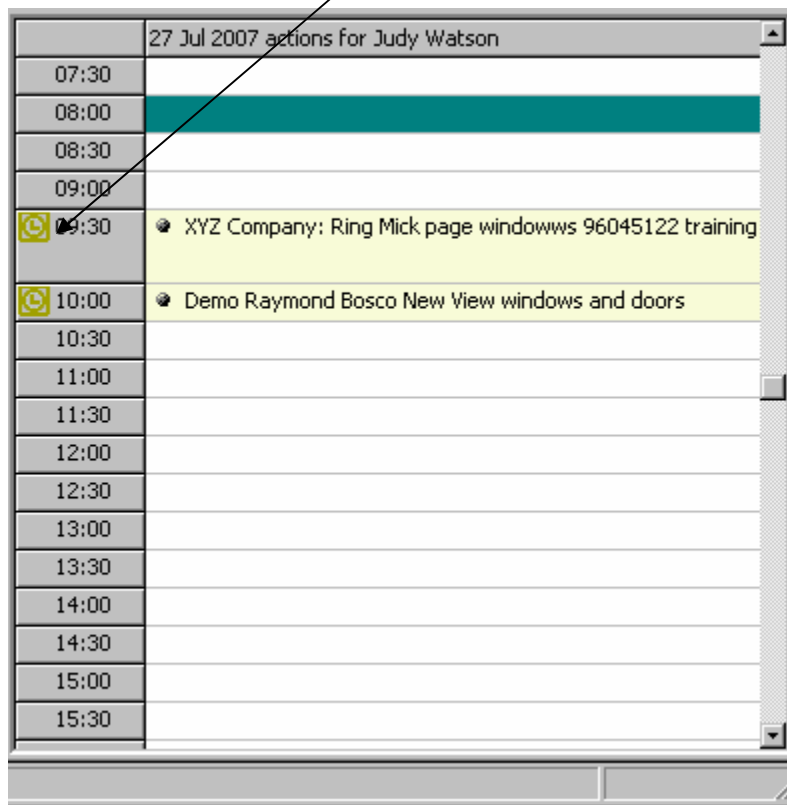
When Set, the Outlook toolbar icon is activated



To import meetings from Outlook, click on the Outlook link on the CRM toolbar, you are shown the list of appointments from your outlook calendar, tick those you wish to import. Note: Meetings already in CRM are show with the CRM icon  next to them.

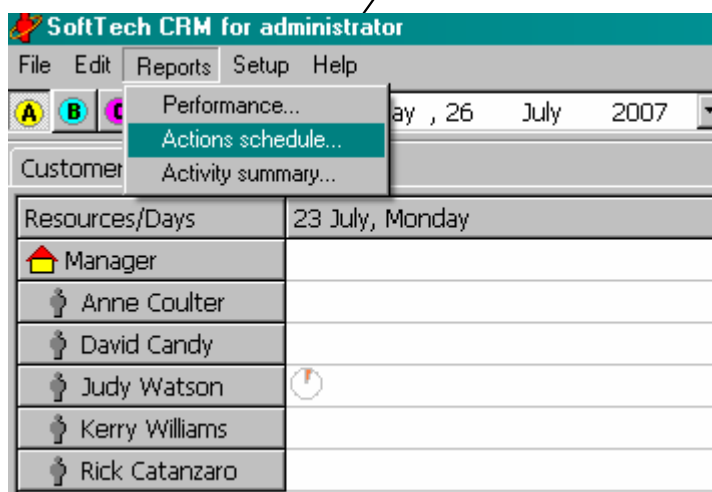


Once imported, the Outlook icon is shown against the appointment in the calendar in CRM



## Reports

From the Reports Tab, choose the type of report you require.



**Report for Soft Tech Australia Pty ...** [X]

Report Type:

Performance Report

Action schedule

Activity summary

Interval:

Last year     This month

Last 3 months     This week

Last month     Other

Last week

From: 1/07/2007

To: 31/07/2007

OK    Cancel

Choose the interval you wish to report on, then click OK.

The report is printed by Sales Person and is self explanatory. In the Activity report, some values are enclosed in ( ), this means the activity is a follow on linked activity.

## Action Schedule

1/07/2007 - 31/07/2007 (31 days)

---

### Anne Coulter

Thursday, 26 July 2007:

08:00 - 10:15	XYZ Company. Ensure that quote for Jones Bay Project is completed	completed
09:00 - 09:15	XYZ Company. Ring re new license	overdue
10:00 - 11:30	XYZ Company. Send out quote	completed
15:30 - 16:00	XYZ Company. Ensure that quote for Jones Bay Project is completed	overdue

Friday, 27 July 2007:

10:30 - 11:00	XYZ Company. Follow up of User Group minutes	completed
13:00 - 16:15	XYZ Company. Re new product lines	scheduled
14:00 - 14:15	XYZ Company. Follow up of User Group minutes	scheduled

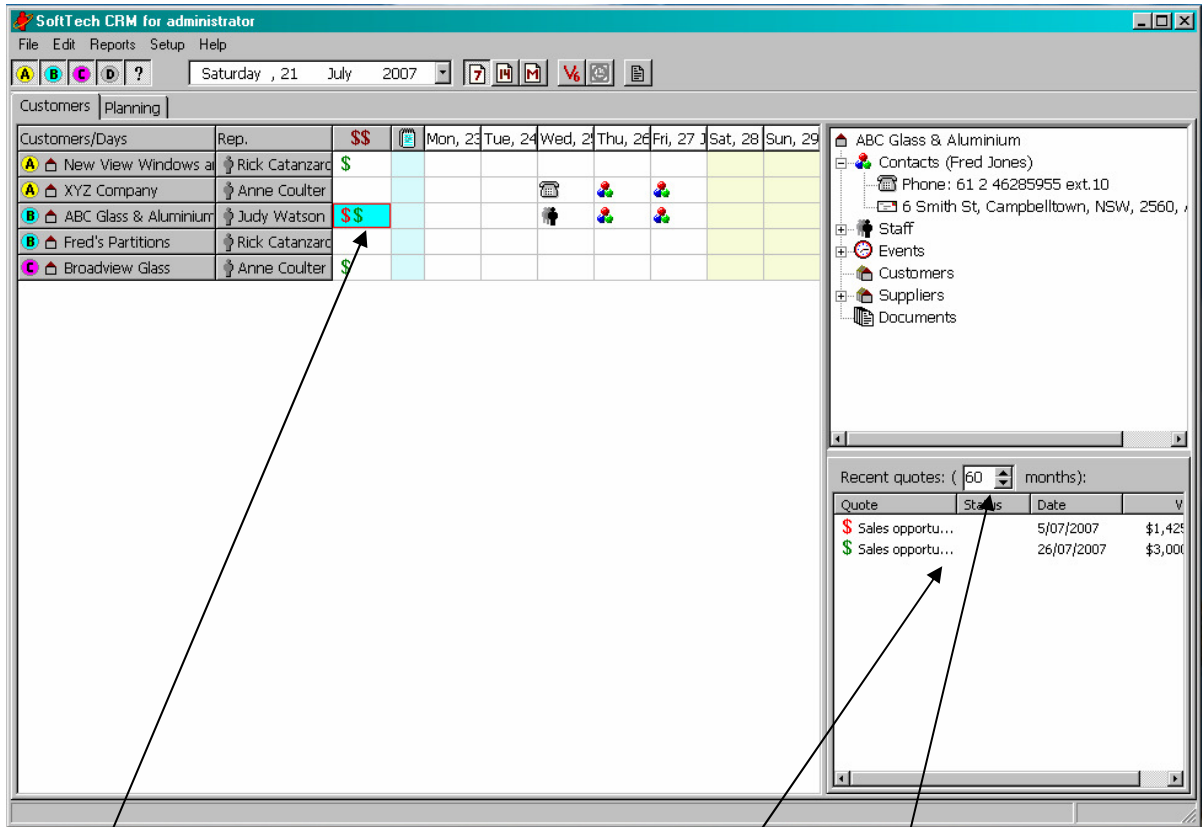
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### David Candy

Thursday, 19 July 2007:

08:00 - 08:05	ABC Glass & Aluminium: Follow up: Chase Pasyment	overdue
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## Quoting and Opportunity Tracking



A column is added on the customer tab and \$ sign s show in the cell when quotes are active for that customer. When the user clicks in the cell, the quotes are listed with: quote #, date, status and \$ value in the lower right dialog window.

The number of entries is goverend by the number of months setting.

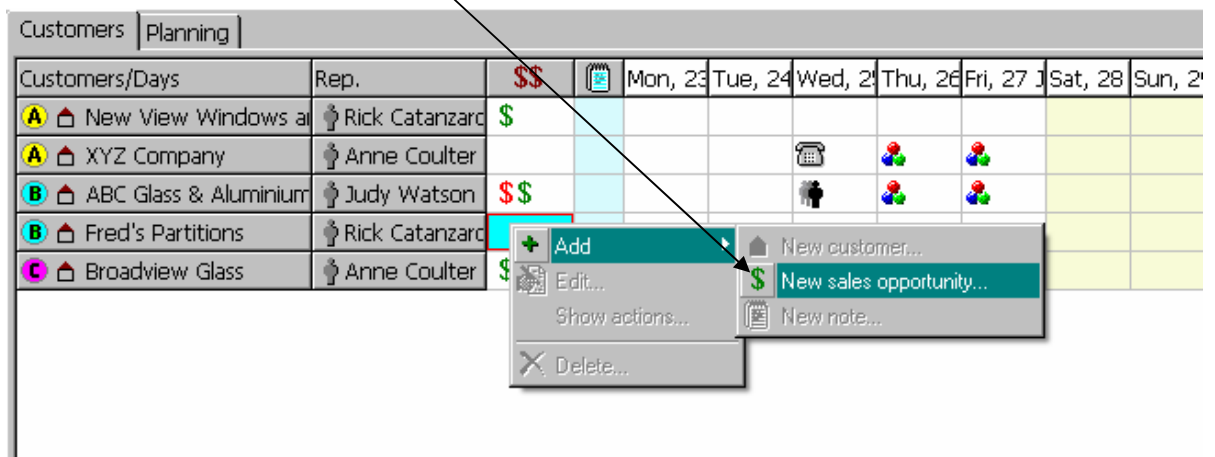
**\$ green, opportunity identified.**

**\$ amber, quote created in V6, New status.**

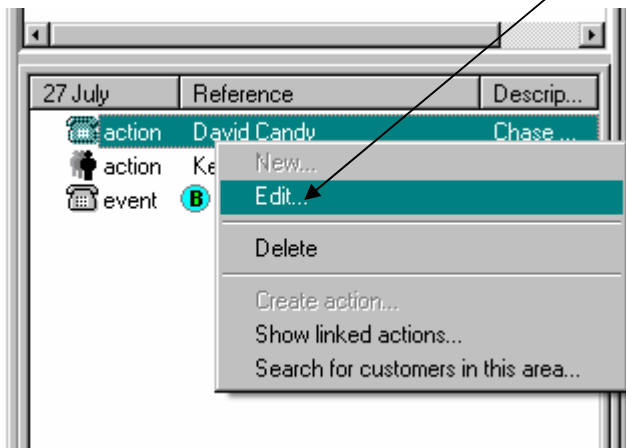
**\$ black, quote in V6 reaches Accepted status.**

**\$ red, quote over 30 days old and not reached Accepted status, or Opportunity passes its expected achievement date.**

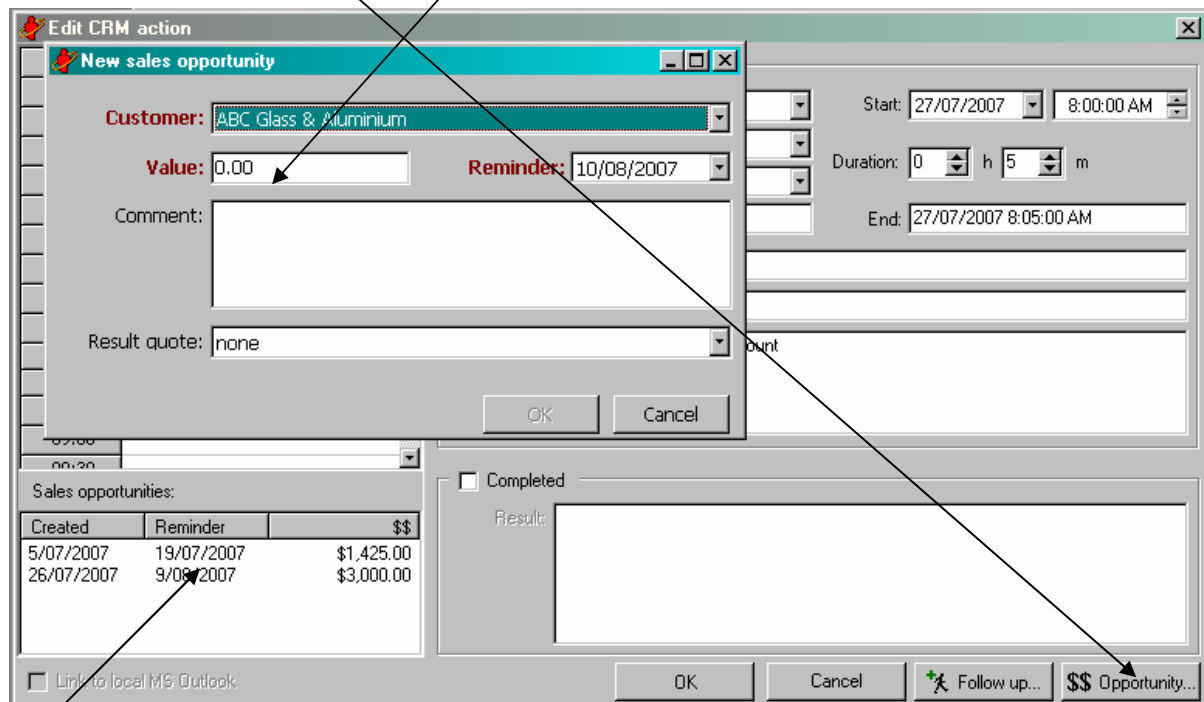
To add an Opportunity, place the cursor in the cell and right mouse click, select New Sales Opportunity from the Add menu.



Opportunities can also be added from the activity add/edit dialog. Right mouse click on an action in the lower right dialog window, click edit



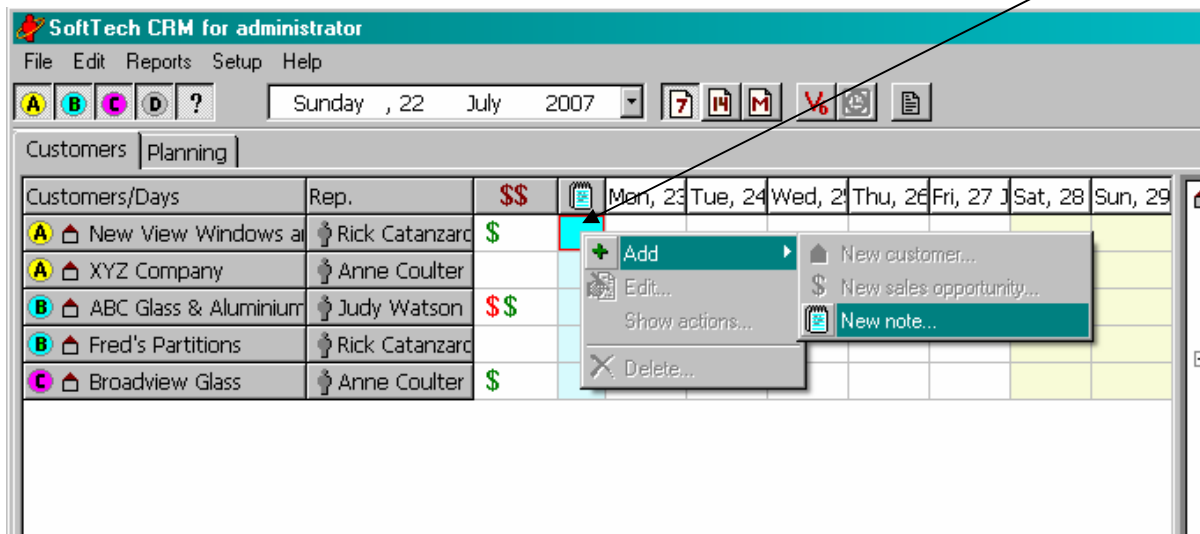
Click on the \$\$ Opportunity button. Add new sales opportunity.



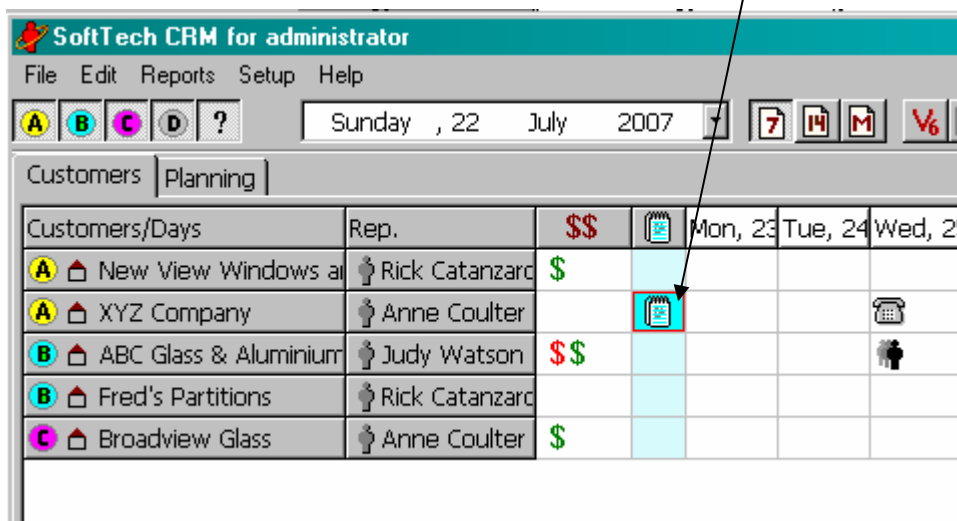
**Note: Opportunities are also displayed in the editor although they are not editable from this display.**

## Notes Column and Notes Display

To add a note to a customer, right mouse click on the notes column, then Add – new note.

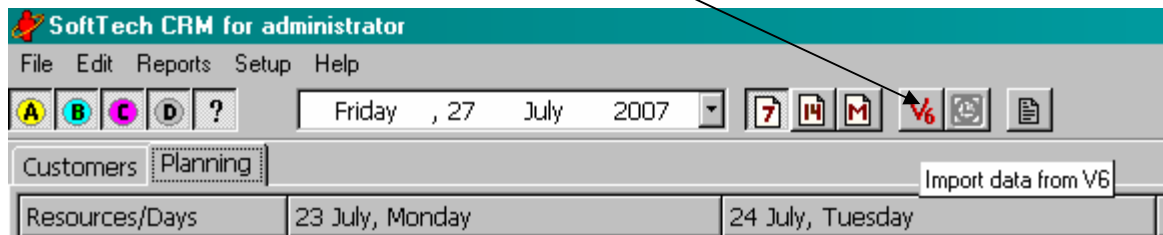


There is no limit to the number of notes you can create, but they must be in plain text. The Note pad icon is used to identify customers with active notes.

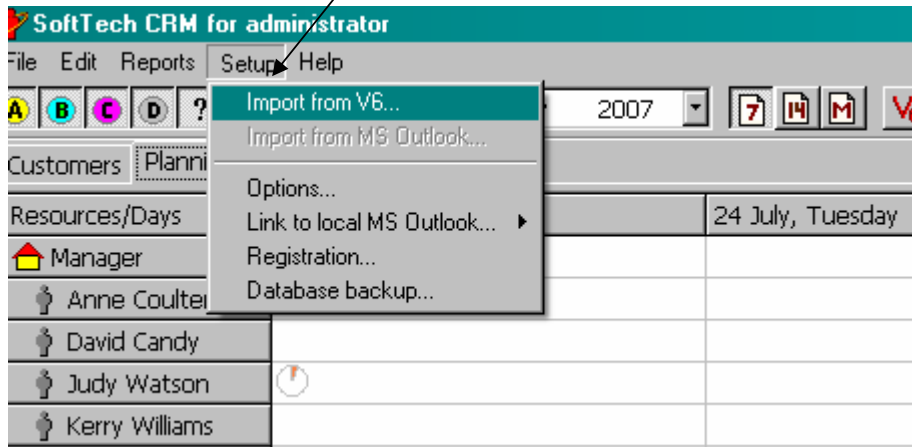


## Import Data from a V6 system – There are two options to do this.

Click on the V6 icon on the CRM tool bar.



Or go to Setup\Import from V6



## Enter the Connection String

This Connection String is (for a MSSQL2000 system).....

**Provider=SQLOLEDB.1;Password=staus;User ID=sa;Initial Catalog=Alspec;Data Source=WORKSTATION\_JW**

### **Initial Catalog=Alspec;**

Alspec is the BDE Admin alias name for the V6 database I want to link to.

### **Data Source= WORKSTATION\_JW**

WORKSTATION\_JW is the Server Name, copied from BDE Admin for Alspec alias.

