Centric CRM

Version 4.1

User's Guide

May 2007

Legal Notice and License

Preface

Centric CRM User's Guide explains the features of Centric CRM, an easy to use, web-based CRM system. This guide helps you understand how Centric CRM works and how you can use this application to improve your sales related business processes and your bottom line.

Summary

This document consists of the following chapters:

- **Chapter 1, An Introduction to Centric CRM**

  This chapter introduces you to the features of all modules of Centric CRM, information on the concept of Customer Relationship Management, and the benefits of CRM in organizing your sales and service related business activities.

- **Chapter 2, Overview of the Home Page**

  This chapter helps you in understanding the features of the **My Home Page** module of Centric CRM. This chapter also provides information on using the calendar to schedule events and activities, updating personal information, and searching for data.

- **Chapter 3, Managing Leads**

  This chapter helps you in understanding the features of the **Leads** module of Centric CRM which includes information on adding, searching, and importing leads until the prospect is turned into a contact.

- **Chapter 4, Managing Contacts**

  This chapter helps you in understanding the features of the **Contacts** module of Centric CRM which includes information on accessing customer details, and monitoring their activities, before they become accounts.

- **Chapter 5, Understanding the Pipeline**

  This chapter helps you in understanding the features of the **Pipeline** module of Centric CRM which includes information on analyzing and managing revenue opportunities with your contacts and accounts.

- **Chapter 6, Managing Accounts**

  This chapter helps you in understanding the features of the **Accounts** module of Centric CRM which includes information on viewing and storing customer details.

- **Chapter 7, Managing Products**

  This chapter helps you in understanding the features of the **Products** module of Centric CRM which includes information on storing product details.

- **Chapter 8, Understanding Quotes**

  This chapter helps you in understanding the features of the **Quotes** module of Centric CRM which includes information on generating and organizing quotes for customers.

- **Chapter 9, Understanding Communications**

  This chapter helps you in understanding the features of the **Communications** module of Centric CRM which includes information on registering and scheduling promotional campaigns, which help in maintaining close contact with customers.

- **Chapter 10, Managing Projects**

  This chapter helps you in understanding the features of the **Projects** module of Centric CRM which includes information on managing projects and inviting employees to join a project.

- **Chapter 11, Accessing the Help Desk**

  This chapter helps you in understanding the features of the **Help Desk** module of Centric CRM which includes information on managing trouble tickets related to issues and resolving them.

- **Chapter 12, Managing Documents**

  This chapter helps you in understanding the features of the **Documents** module of Centric CRM which includes information on managing document stores, which contain operational information.

- **Chapter 13, Managing Employees**

  This chapter helps you in understanding the features of the **Employees** module of Centric CRM which includes information on accessing and updating employee details, such as title, addresses, phone numbers, and email addresses.

- **Chapter 14, Viewing Reports**

  This chapter helps you in understanding the features of the **Reports** module of Centric CRM which includes information on viewing and adding reports in the desired categories including admin and accounts.

- **Chapter 15, Configuring the Application**

  This chapter helps you in understanding the features of the **Admin** module of Centric CRM which includes information for the administrator to modify users and their roles, edit global parameters, and check the system usage.

What is New in Centric CRM 4.1 ?

Centric CRM version 4.1 consists of the following additional features:

New Features

- You can attach documents directly to an outgoing email from any of the following CRM modules:
  - Contact
  - Account
  - Shared document store
  - Project

  You can also upload a new document to any of these modules while creating an email message.
- You can define roles and set permissions for portal users by allowing access to a few modules and restrict permission to other modules. A portal user can be the customers or vendors of your company.
- You can attach documents directly to general contacts and account contacts.
- You can bulk import product details specified in a .csv file into Centric CRM and the accompanying product images compiled in a .zip file.
- You can generate and email a password to the user, when adding a new user. Previously this capability only appeared on the **Modify User** page.
- Products module is moved from the **Admin** page to a new top-level module.

Updated Features

- You can now independently schedule activities and log activities without recording a past activity. The **Add an Activity** link has been split into two different links - **Log an Activity** and **Schedule an Activity** allowing you to enter details of a planned activity independent of any past activity.
- You can now record activities against an account without specifying a contact.
- You can generate HTML, CSV, and Excel reports, in addition to the existing PDF reports. A new option automatically emails the generated report to you.
- You can now import accounts without any contact data. Previously the import required contact names in addition to the organization name.
- You can now refine account searching with more search fields and additional data in the search results.
- The following fields have been added to lead, contact, and account records:
  - **Revenue**
  - **Latitude/Longitude**
  - **Business Name 2**
  - **Year Started**
  - **SIC**
  - **DUNS Type**
  - **DUNS Number**
- You can now choose a date and time, when sending a campaign.

- You can now view the admin customizable **Action Plan** data in the **Action Plan** dashboard list.

Audience

This guide is written to help users, such as salespeople, analysts, and managers, who intend to use Centric CRM.

Contact Us

We value your feedback and comments on the document. Please mention the software, version of the software, and title of the document in your message.

You can send us your comments and feedback by mail at:

Centric CRM

223 East City Hall Avenue, Suite 212

Norfolk, VA 23510

Conventions

The following conventions are used in the document to help you identify special terms.

Convention	Usage	Example
Bold	The following screen elements: Tabs List Drop-down menu GUI items	Click **OK.**
Italic	Book titles and emphasis	Refer to *Concepts Guide* for more information.
`monospace`	Code samples and commands	To run the installer, enter the following command: `C:\>run_installer.bat`
`monospace italic`	Variable in a command or code that you may replace with other values, as required	To make a new directory, enter: `C:\>mkdir` *`new_directory_name`*
`[ ]`	Optional parameters	`C:\>run_installer.bat [-p]`
`|`	Mutually exclusive choices in a command or code	`C:\>run_installer.bat [-p | -r]`

Table of Contents

CHAPTER
1

An Introduction to Centric CRM

This chapter provides an overview of customer relationship management concepts, the advantages of using Centric CRM, a brief look at the various modules of Centric CRM, how Centric CRM helps you organize your sales-and service-related business activities.

This chapter contains the following sections:

- **Section 1.1, "What is Customer Relationship Management?"**
- **Section 1.2, "Understanding the Need for Customer Relationship Management"**
- **Section 1.3, "Features of Centric CRM"**
- **Section 1.4, "Benefits of Centric CRM"**
- **Section 1.5, "Understanding the Modules of Centric CRM"**

1.1 What is Customer Relationship Management?

Customer Relationship Management (CRM) is an industry term for software solutions that help organize your business through proper management of customer interactions. A CRM package helps you organize and manage all aspects of pre-sales, sales, and service relationships with your customers.

CRM itself may be divided into various categories, such as:

- Operational Customer Relationship Management, which automates basic business processes. Examples include call centres, sales force automation, and supply chain management.
- Analytic Customer Relationship Management, which supports analysis of customer behavior and utilizes the customer and product related information present in a database for marketing activities.
- Collaborative Customer Relationship Management, which provides constant contact with customers, whether it is through e-mail, phone, web, or in person

A good CRM package helps you in the following ways:

- Collates vital customer information
- Tracks order history for future use
- Provides global access to customer history

- Identifies new opportunities

Centric CRM provides all these features.

1.2 Understanding the Need for Customer Relationship Management

Increasing competition and rapid advances in technology have made companies realize the importance of making customers their key focus. By focusing on customer relationships, companies can significantly enhance their ability to gain new customers, and retain existing ones. Improving customer relationships provides the following benefits to the company:

- Establish and maintain customer rapport
- Integrate processes such as pre-sales and post-sales
- Reduction in costs, by enabling efficient and automated order handling
- Quick resolution of task related problems
- Reduction of advertising costs by replacing advertising with direct/targeted customer marketing

1.3 Features of Centric CRM

Centric CRM is one of the leading products in the open source Customer Relationship Management arena. Centric CRM is a customer-centric application that helps you in organizing your business efficiently. The key features of Centric CRM are:

- A complete set of modules for managing sales and customer relationships
- Combines the best features of open-source and commercial software

  Centric CRM is enterprise ready and its functionality includes:
  - Authentication and Encryption
  - Logging and Administration
  - Ease of Integration
  - Scalability and Portability
- A fully graphical installer
- A high performance relational database
- Support for major browsers, including older versions
- Support for all major platforms, such as MS Windows, Linux, Mac OS X, Solaris, and BSD

1.4 Benefits of Centric CRM

Centric CRM combines the best features of open-source and commercial software, as summarized in **Figure 1.1**.

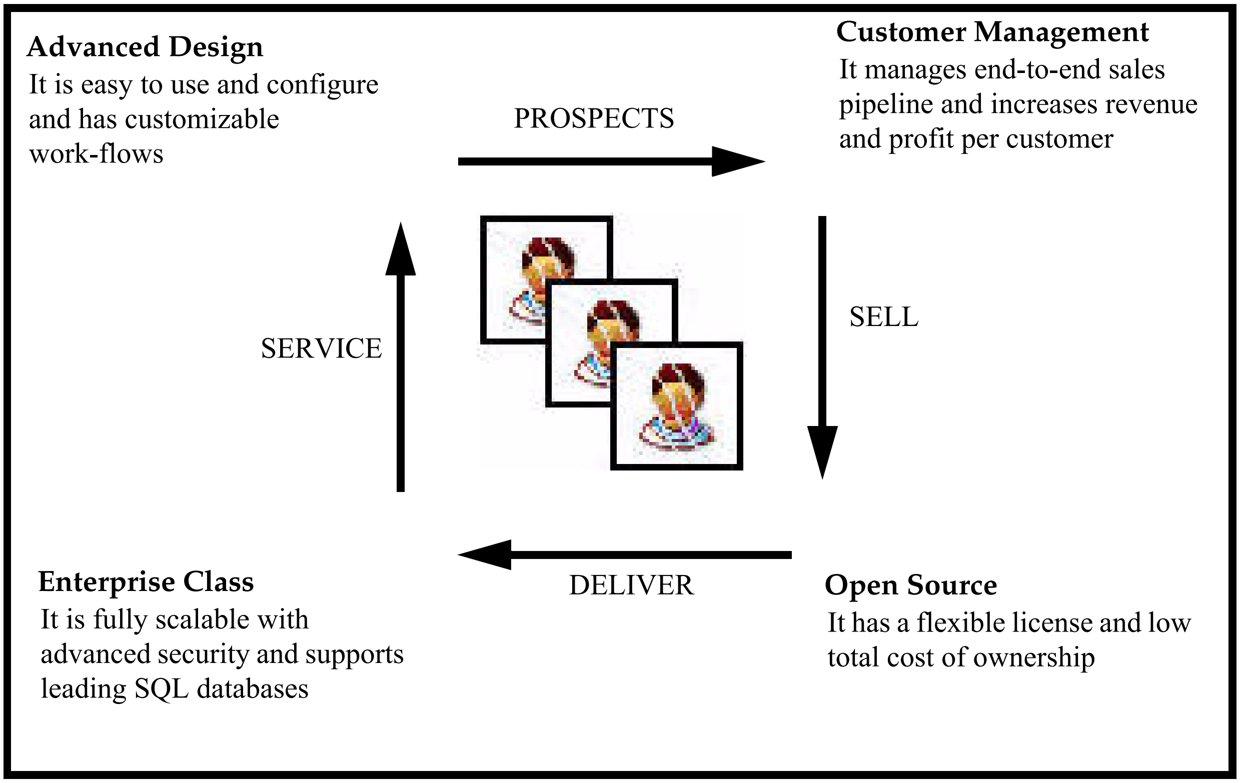


Figure 1.1 Benefits of Centric CRM

Centric CRM has the following benefits:

- Provides secure entry-points to prevent unauthenticated access
- Improves performance by allowing system-level resource sharing
- Allows project planning and execution
- Allows direct database connectivity and enables you to add tables and forms using folders
- Allows you to import files in a simple Comma Separated Value (.csv) format

1.5 Understanding the Modules of Centric CRM

This section provides a brief introduction to all the modules of Centric CRM.

Note: The **Admin** module is available to only those users who have been assigned privileges to configure the application. If you cannot view the **Admin** tab, contact your Centric CRM administrator for access permission.

The modules are available as tabs across the top of the Centric CRM interface.

My Home Page

My Home Page enables you to get a concise view of what is happening in the organization, in a dashboard format. In this module, you can find the following information:

- Alerts and reminders of actions or tasks for which you are responsible
- Assignments you have been given
- Critical customer information, such as expiring contracts due for renewal

You can also change your password and perform other simple administrative functions. The more complex administrative functions are the responsibility of the administrator.

Leads

The Leads module enables you to manage lead information and track prospective customers before the prospects are converted into accounts. You can import leads into your **Leads** dashboard and also export them from the dashboard to other locations.

Contacts

The Contacts module enables you to manage information about people you know, or have met. A contact can be an individual associated with an account or a general contact. Contacts are searchable, can have a variety of attributes and classifications, and can have a rich set of information attached to them, such as messages, activities, and opportunities. The contact record provides a chronological view of all dealings with any contact.

Pipeline

The Pipeline module enables you to enter and analyze information about opportunities on which you and your organization are working. This module provides both dashboard and detailed views of what you think your revenue potential is in the future, and gives you a place to actively work on the closing of those opportunities.

As in all of Centric CRM, the system models your corporate organization, so that individuals higher in the organizational chain can view the items in the pipeline of those who report up through to them.

In the **Pipeline** module, you define opportunities, and save a variety of data about them, such as estimated amount, term and the probability of success. You can also attach documents, such as presentations or proposals, to opportunities.

Accounts

Information about customers is managed in the **Accounts** module. In this module, you not only view the usual name and address records, but also integrate all sales opportunities, activities, documents, contracts, assets, and help desk items pertaining to the account in one place, so you can have a holistic view of each account. For a sales organization, the **Accounts** module is the nerve center of the CRM system.

Products

The Products module stores information about the company's products. Using this module, you can add products, their pricing details and other information. You can also categorize products, and view the list of products. You can also bulk-import products information into this module, from data files.

Quotes

The Quotes module enables you to prepare quotations, based on your product catalog, for customers who show interest in one or more products. Quotes can go through several revisions, so this module provides quote versioning to keep track of a quote and all its revisions.

Communications

The **Communications** module serves as a multi-dimensional campaign manager, enabling you to perform the following tasks:

- Interactively build a group of contacts with whom you want to communicate
- Design a multimedia message you would like to send
- Determine how (E-mail, fax, hard copy, or a combination) and when you want to send the message

Messages you send are kept in each contact's record, so you always know what each contact has been sent. Messages can also have special attachments, such as interactive surveys that you can design. The results of surveys are automatically tallied and presented.

Projects

The **Projects** module is a complete distributed project management system. In this module, you can build the following project-related resources:

- Project plans
- Teams
- Discussion forums
- Brainstorming lists
- Trouble tickets
- Documents

The **Projects** module allows you to build as many projects and teams as you want. You can also invite outsiders to view or contribute to projects.

Help Desk

The sales process is a part of the overall customer relationship. Post-sales service is critical to keeping customers coming back for more. The **Help Desk** module provides a powerful and complete help desk, call center, and trouble ticket solution. **Help Desk** is tied to **Accounts** and **Contacts**, and incorporates many advanced features, as listed below:

- A full action history of everything that has happened concerning a ticket
- An activity log describing actions taken on the unresolved tickets and time spent in solving the issue.
- Folders where you can design new forms to collect, store, and report on information the basic system does not contain. You can add tables to the database without programming expertise.
- Documents can be attached to help desk items
- Help desk items can be assigned to the concerned person for resolving the issue.
- Workflow scenarios that can be generated which describe Service Level Agreements (SLAs), escalations, or other special situations

This module also allows you to perform the following tasks:

- Easily generate maintenance notes against a contract or asset.
- Assign tasks associated with the unresolved ticket to employees.

Documents

The **Documents** module enables secure management of documents, using a concept called Document Stores, that can efficiently store documents and categorize them for easy access. You can configure a document store to have a team of users with access permissions.

Employees

Information about employees is kept in the **Employees** module. You can find the following information about employees in your organization:

- Names
- Addresses
- Phone numbers
- E-mail addresses

Reports

Reports is a sophisticated reporting module that underlies all of Centric CRM. Centric CRM provides a report writer, in which you can design and run reports of arbitrary complexity. Centric CRM comes with thirty stock reports and Dark Horse Ventures designs. This module allows you to build custom reports according to your requirements.

Admin

You can configure Centric CRM in the **Admin** module. The main functions of this module are:

- Build roles, which define fine-grained access to everything in the system
- Define users

- Modify system parameters
- Build folders to extend the capabilities of the database without programming
- Examine system usage statistics, including the number of logins, information transferred, faxes sent, and used disk space

CHAPTER
2

Overview of the Home Page

This chapter helps you understand the features of the **My Home Page** module of Centric CRM. The features of this module enables you to store and view basic information about your business, contacts, and employees. This module also summarizes all the actionable information present in Centric CRM.

This chapter contains the following sections:

- **Section 2.1, "How Does This Module Help You?"**
- **Section 2.2, "Understanding the Calendar"**
- **Section 2.3, "Viewing the Mailbox"**
- **Section 2.4, "Managing Tasks"**
- **Section 2.5, "Building Action Lists"**
- **Section 2.6, "Assigning Action Plans"**
- **Section 2.7, "Managing Re-Assignments"**
- **Section 2.8, "Controlling Settings"**

2.1 How Does This Module Help You?

You can use this module to implement and organize the following tasks:

- Access your emails
- View your calendar, meetings, activities, tickets, and pending tasks
- Search for data
- Reassign tasks, opportunities, and activities to various persons in your hierarchy
- Update your personal information
- Change your password

My Home Page consists of a calendar and reminder page, as shown in **Figure 2.1**.

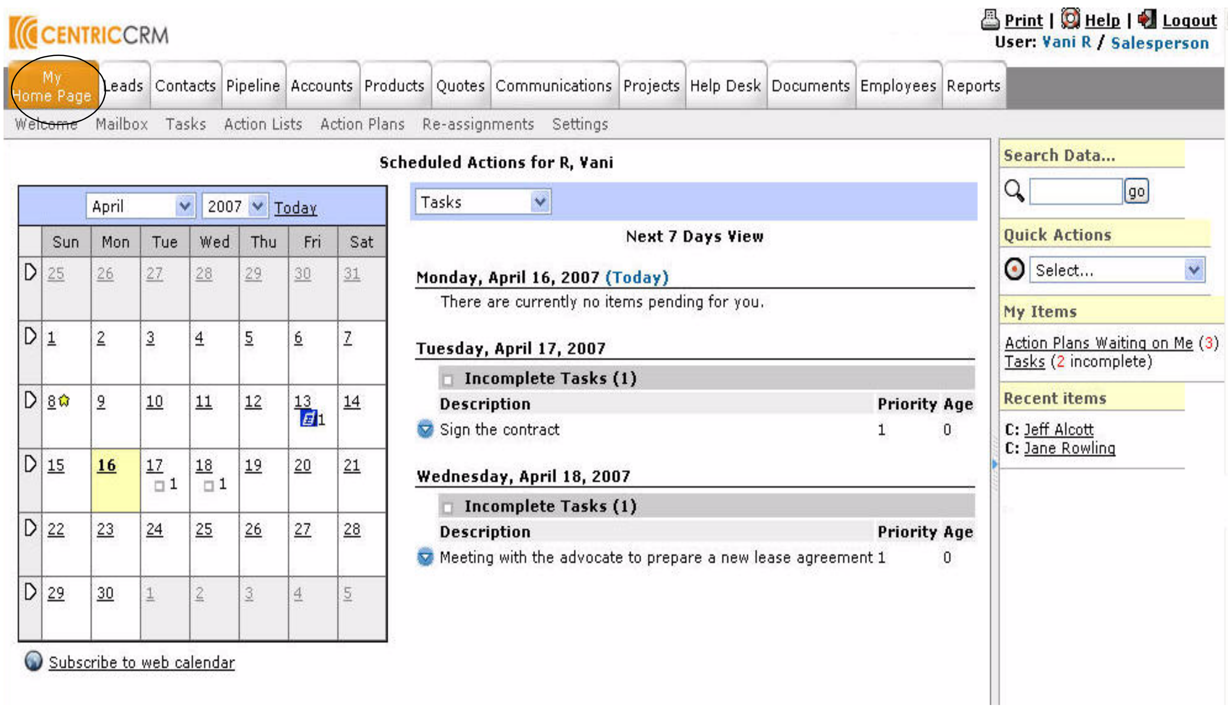


Figure 2.1 My Home Page

The page layout is similar in all the modules in Centric CRM and has the following components:

- A row of module tabs across the top of the page
- A row of sub-tabs below the module tabs, that form the menu bar for each module
- Icons at the top right that enable you to perform the following tasks:
  - Print a copy of the page
  - Access the context-sensitive help system
  - Check your system resources
  - logout
- User name and role at the top of the page
- Icons and links at the extreme right that enable you to perform the following tasks:
  - Search the system
  - Take quick actions
  - Perform other useful functions

2.2 Understanding the Calendar

A calendar displayed on the left side by default enables you to view a quick summary of the scheduled tasks for the selected month, as shown in Figure 2.2.

You can view the scheduled actions for each day represented as icons in the calendar. For more information on scheduled actions, refer to **Section 2.2.2, "Viewing Scheduled Actions in the Calendar"**.

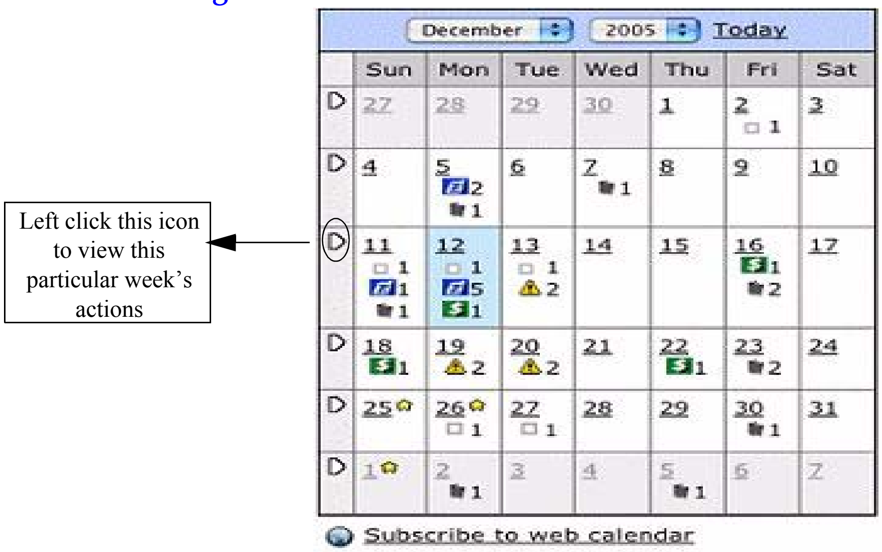


Figure 2.2 My Home Page Calendar

You can view the calendar offline using the following procedure:

- Clicking **Subscribe to Web Calendar** link below the calendar.
- Connecting to the internet and refreshing your calendar to download your latest home page calendar items.

Note: Ensure you have a desktop calendar application that supports the vCalendar protocol. Two well-known calendar applications are Mozilla Sunbird and Apple iCal.

2.2.1 Viewing the Calendar

You can choose a weekly or a daily view in the calendar. You can view the current date by selecting **Today** at the top of the calendar, as shown in Figure 2.2. Selecting **Today** displays all scheduled activities pertaining to the current date. You can view the scheduled actions of a particular week by clicking the icon on the left side of the corresponding week, as shown in Figure 2.2. Clicking **Back to Next 7 Days View** displays the current week.

Use the options at the top of the calendar to change the month. Centric CRM remembers your calendar view settings for the duration of your current login session. It will revert to the **Next 7 Days View** at the next login.

2.2.2 Viewing Scheduled Actions in the Calendar

The **Scheduled Actions** section is displayed to the right of the calendar, as shown in **Figure 2.3**. Scheduled actions include the following information:

- **Pending Items** - represented as a yellow triangle
- **Completed Activities** - represented as a blue square with a cell phone in it
- **Opportunities** - represented as a dollar sign
- **Holidays** - represented as a yellow star
- **Accounts** - represented as a black folder
- **Assignments** - represented as a grey square

Clicking a date in the calendar displays the scheduled actions for that specific day.

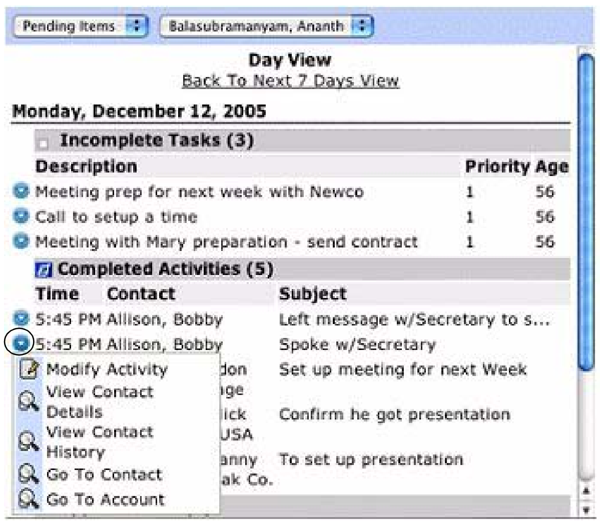


Figure 2.3 Scheduled Tasks

The **Scheduled Actions** section lists the scheduled activities. The scheduled activities are organized based on the scheduled calendar date and the type of the activity such as Incomplete Tasks, Completed Activities and Holidays. An action icon (the triangular icon to the left of a scheduled activity, as shown in **Figure 2.3**) enables you to manage actions. When you click the action icon, a context menu is displayed (visible in the lower left corner of **Figure 2.3, "Scheduled Tasks"** above).

The following tasks are available on the context menu:

- Modify an activity
- View a contact's details
- View a contact's history
- Go to a particular contact or account

Note: To return to the calendar from another area, click the **Welcome** sub-tab.

2.3 Viewing the Mailbox

Centric CRM includes an internal messaging system that enables you to send messages to other users of the solution.

Click **Mailbox** on the menu bar to access the mailbox. The default folders available are:

- Inbox
- Archived Mails
- Sent (Outbox)

You can perform the following tasks:

- Viewing details of a mail
- Replying to a mail
- Forwarding a mail
- Deleting a mail

To compose a mail, click **New Message** located at the top, as shown in **Figure 2.4**.

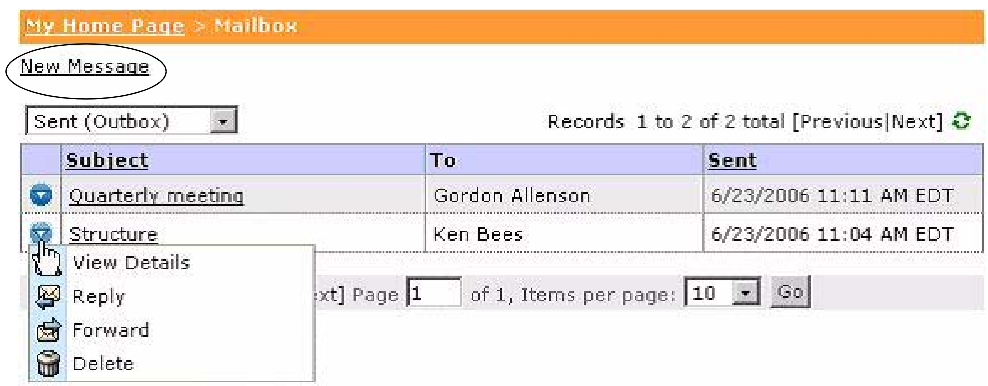


Figure 2.4 Accessing Mailbox

2.4 Managing Tasks

A personal task-list is a set of tasks scheduled for the day or week. Centric CRM has an inbuilt personal task-list. On clicking **Tasks**, the basic task listing screen is displayed, as shown in **Figure 2.5**.

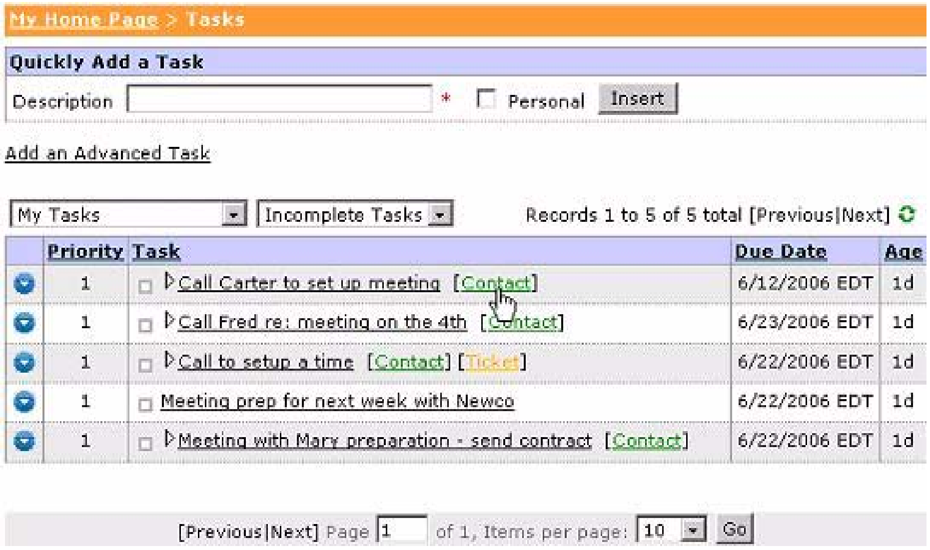


Figure 2.5 Task List

The task-listing contains the following items in each row:

- Action icons
- Priority of the task
- Description of the task
- Due date
- Age

To view details of the task, click the action icon. The **Contact** link (highlighted in green) to the right of the description displays the contact details page.

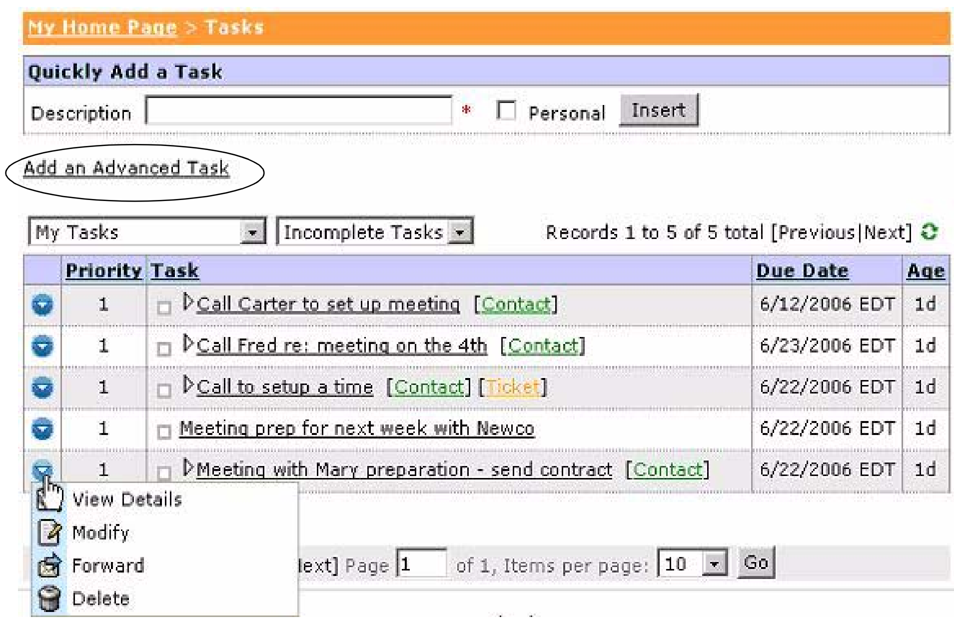


Figure 2.6 Task Actions

The task list has a checkbox to the left of each task, where completed tasks are marked. When you click the action icon, a context menu is displayed. The following tasks are available on the context menu:

- View task details
- Modify a task
- Forward a task to another user
- Delete a task

Tasks related to a trouble ticket will have a ticket link to the right of the description. To view the task details page, click the task description itself.The task details page is shown in Figure 2.7.

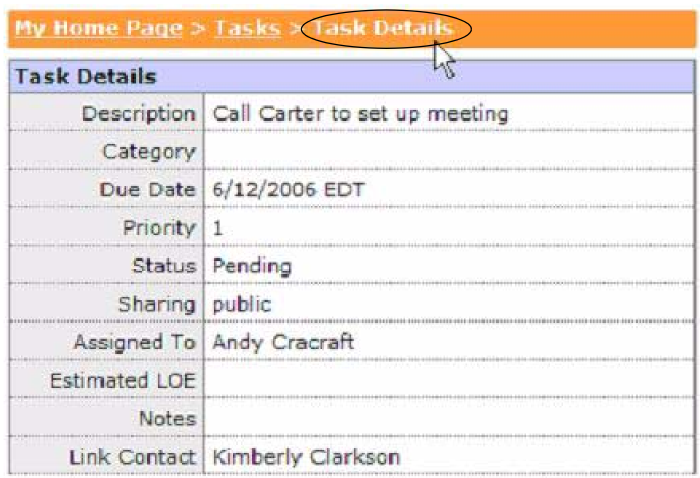


Figure 2.7 Task Details

The **Task Details** page contains the following information about the task:

- **Description** - which is a short description of the task
- **Due Date** -refers to the expected date of completion of the task.
- **Priority** - expresses the importance of the task
- **Status** - displays the status of the task, whether pending or complete
- **Sharing** - determines if the task is personal, which only you can see
- **Assigned To** - the person the task is assigned to in your hierarchy
- **Estimated Level Of Effort (LOE)** - which states the estimated time for the task to be completed
- **Notes** - free form notes
- **Link Contact** - which refers to a link to the related contact, if there is one

You can add a task using the following options on the **Task** page:

- **“Quickly Add a Task”**
- **“Add an Advanced Task”**

2.4.1 Quickly Add a Task

You can add a task by specifying only the description, as shown in Figure 2.8.

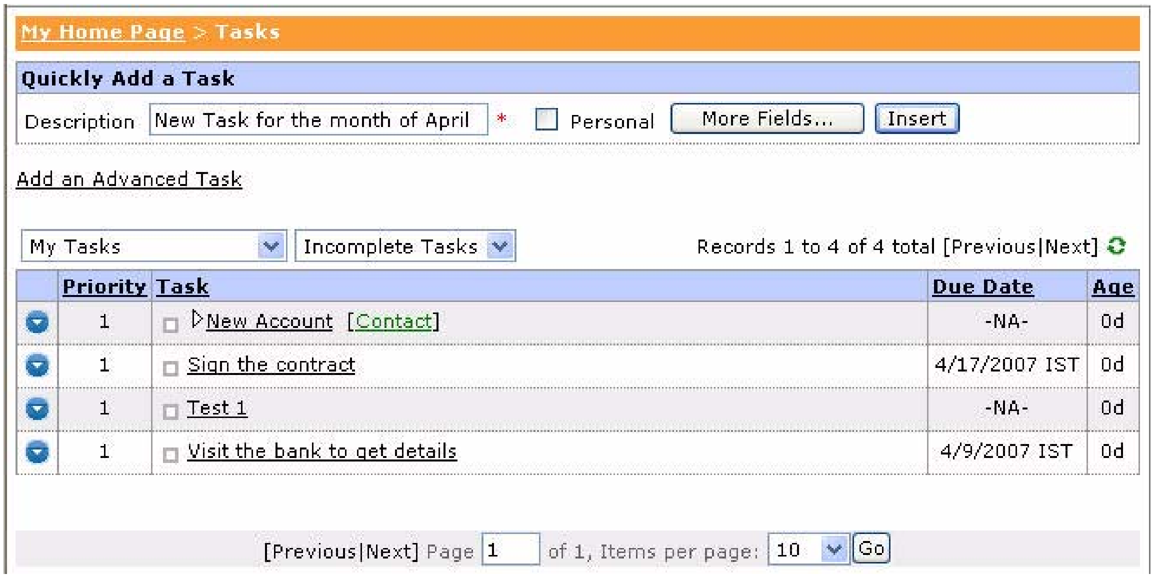


Figure 2.8 Adding a Task Using Quickly Add a Task Option

2.4.2 Add an Advanced Task

You can add a detailed task, specifying all the relevant details in two ways as listed below:

- Using the **Add an Advanced Task** option
- Using the **More Fields** button

Clicking the **More Fields** button, as shown in Figure 2.9, displays the **Add a Task** form which enables you to add a detailed task.

Figure 2.9 Adding a Task Using the Add an Advanced Task Option

Selecting the **Add an Advanced Task**, as shown in Figure 2.9, also displays the **Add a Task** form, as shown in Figure 2.10.

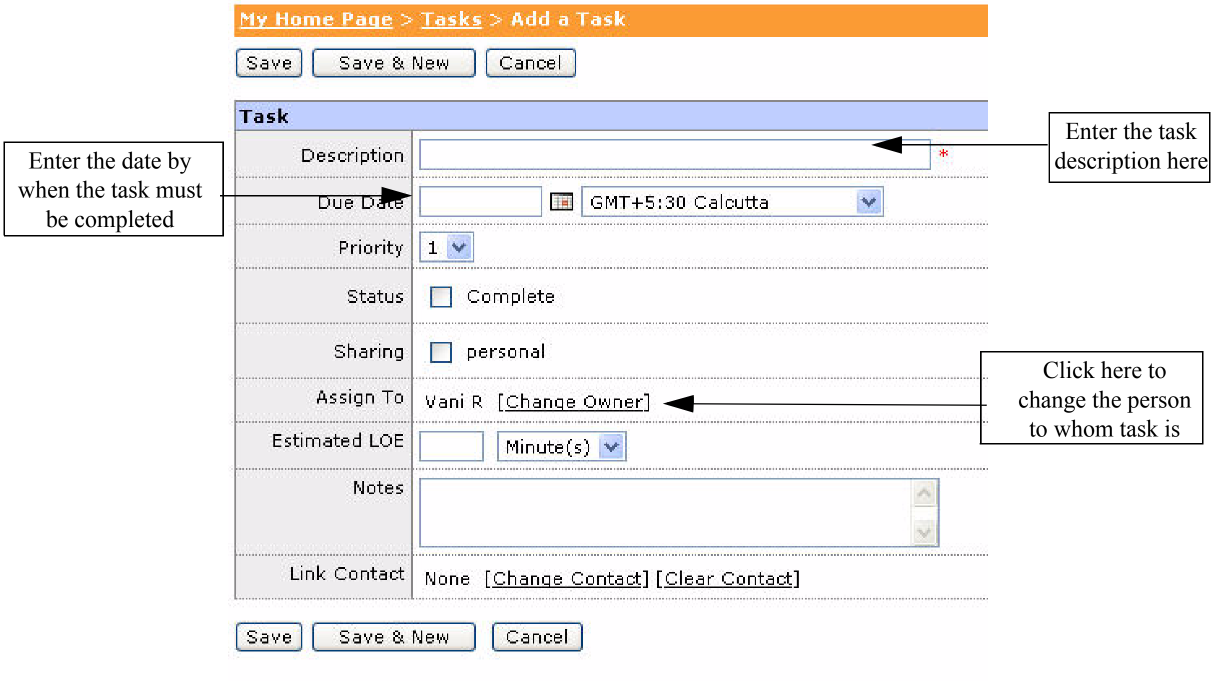


Figure 2.10 Add a Task Form

2.5 Building Action Lists

Action Lists enables you to interactively build a list of contacts on which you want to perform actions. This module is very useful in a sales or business development environment as it enables you to perform the following tasks:

- Add activities, opportunities, tickets, and tasks to any contact in the list
- View the contact record
- Send a multimedia message to the contact

2.5.1 Viewing, Creating, and Deleting Action Lists

To view or create action lists, click the **Action Lists** sub-tab in **My Home Page**. The action lists page will be displayed, as shown in Figure 2.11.

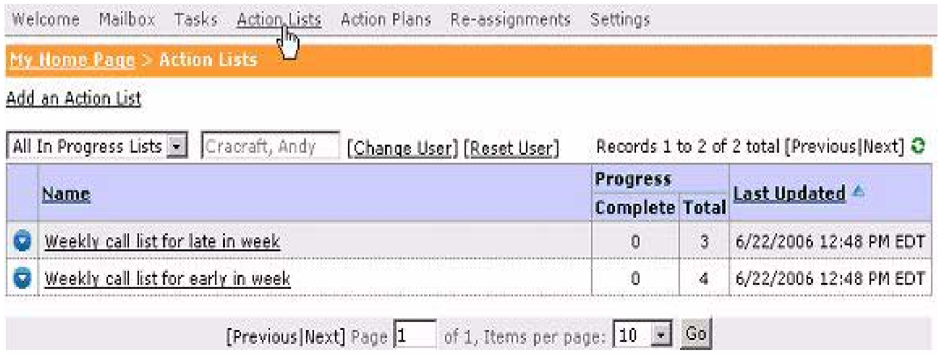


Figure 2.11 Action Lists Page

The page you are viewing may have action lists, depending on how you have used Centric CRM until now, as shown in Figure 2.12. You can perform the following tasks:

- View the details
- Modify the details
- Add contacts to action list
- Delete an action list

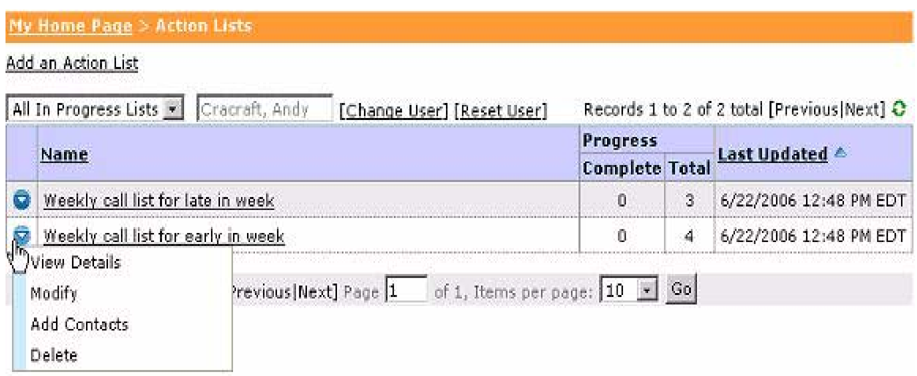


Figure 2.12 Action List Action Icon

2.5.2 Working With Action Lists

The action list can be accessed by clicking **View Details**, which displays a page as shown in Figure 2.13.

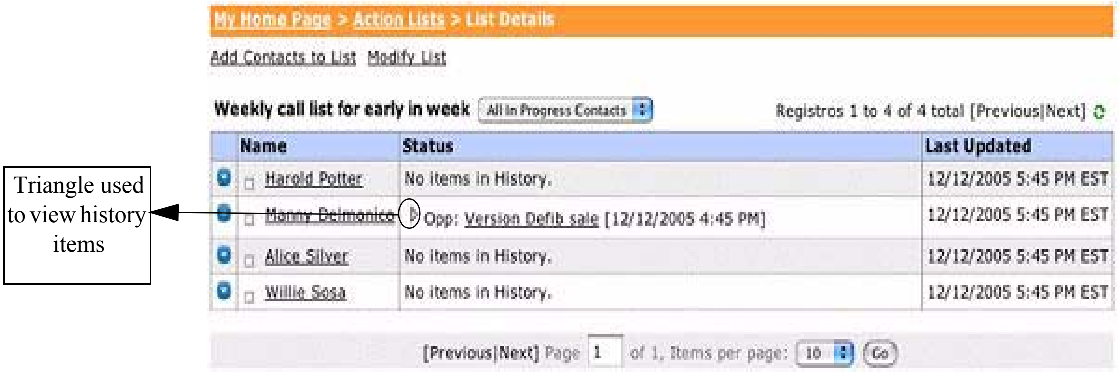


Figure 2.13 An Action List Details Page

You can filter the action lists you see in the list. The following lists are present in the drop-down list:

- **All in Progress Lists** - lists all the action lists which are in progress
- **All Complete Lists -** lists the completed action lists
- **All Lists -** lists all the action lists

All in Progress Lists is the default option.

An action **List Details** page, as shown in **Figure 2.13** contains the following information on each row:

- An action icon
- The name of the contact
- The status of actions for each contact
- The date and time of the last update for each contact

The **Action List** keeps a detailed chronological history of all actions for each contact in a compact format. The **Status** column displays the latest action, but you can view the entire history by clicking the little triangle, as shown in **Figure 2.13**. The triangle is not displayed when there are no other items in the history. A contact without a triangle implies an opportunity that needs action, as shown in **Figure 2.13**.

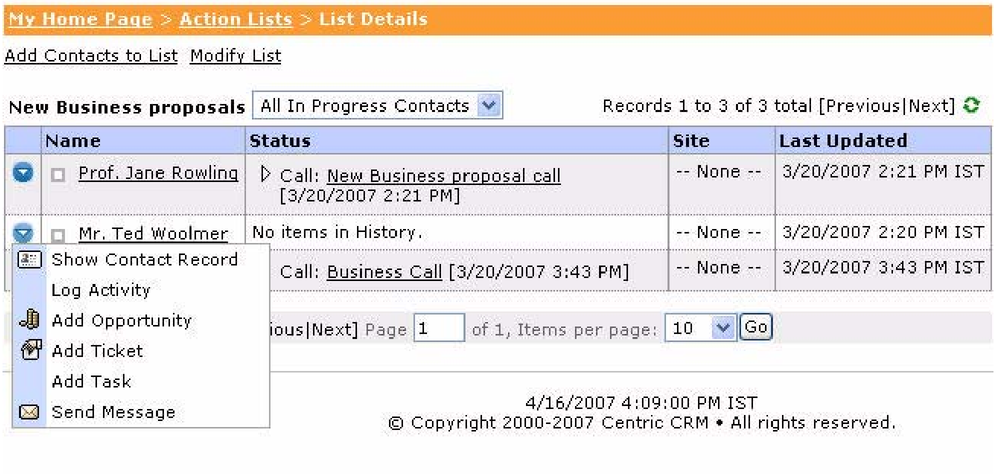


Figure 2.14 Viewing the Options in the Context Menu

When you click the action icon, a context menu is displayed. The following options are available on the context menu:

- Show the contact record
- Log an activity
- Add Opportunity
- Add a ticket
- Add a task
- Send a message

2.5.2.1 Viewing the Contact Record

Clicking this option displays a contact record pop-up window enabling you to perform the following tasks:

- Modify a contact
- Move a contact
- Download the contact's vCard
- Delete a contact

You can view details such as, email address, phone number, mailing address, and other related information, as shown in **Figure 2.15**.

For a detailed information on the various sub-tabs in a contact record, refer to **Section 4.2.2, “Viewing Contacts”**.

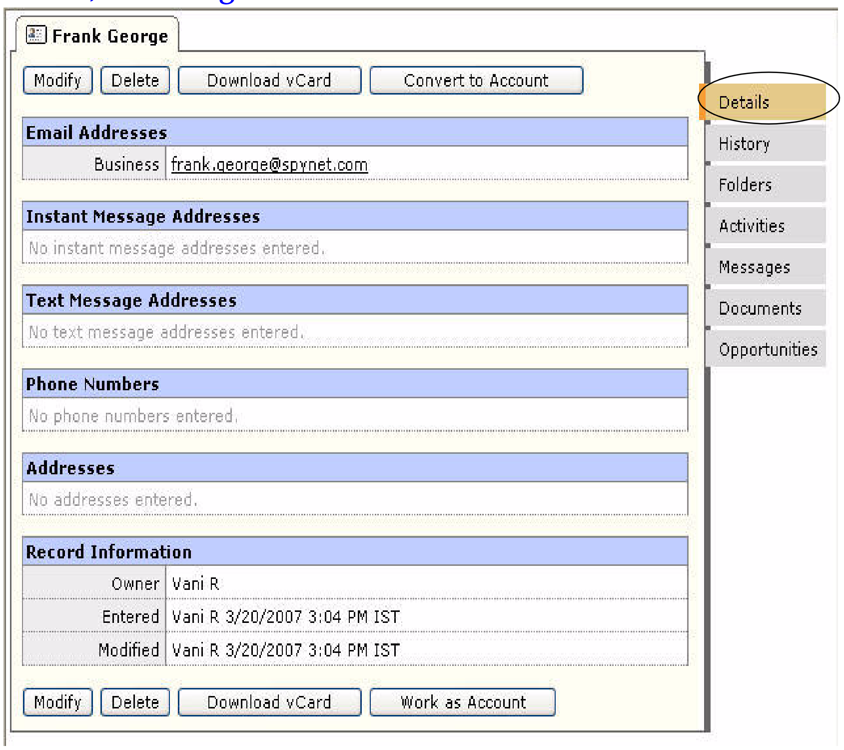


Figure 2.15 Pop-Up Contact Record

2.5.3 Adding an Action List

To add a new action list, select **Add an Action List** located at the top, as shown in **Figure 2.16**.

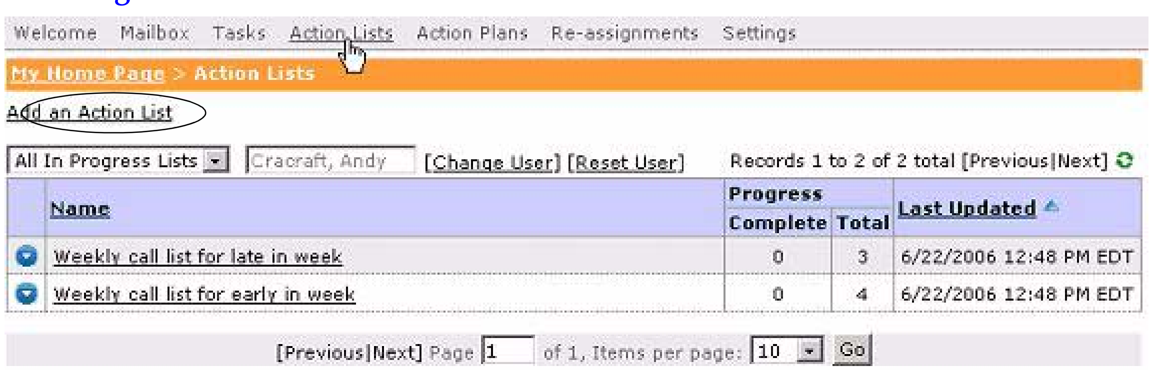


Figure 2.16 Adding an Action List

A new query page is displayed. Enter the required description, and then add contacts, either manually with the **Add/Remove Contacts** link, or by defining criteria in the query interface as shown in **Figure 2.17**.

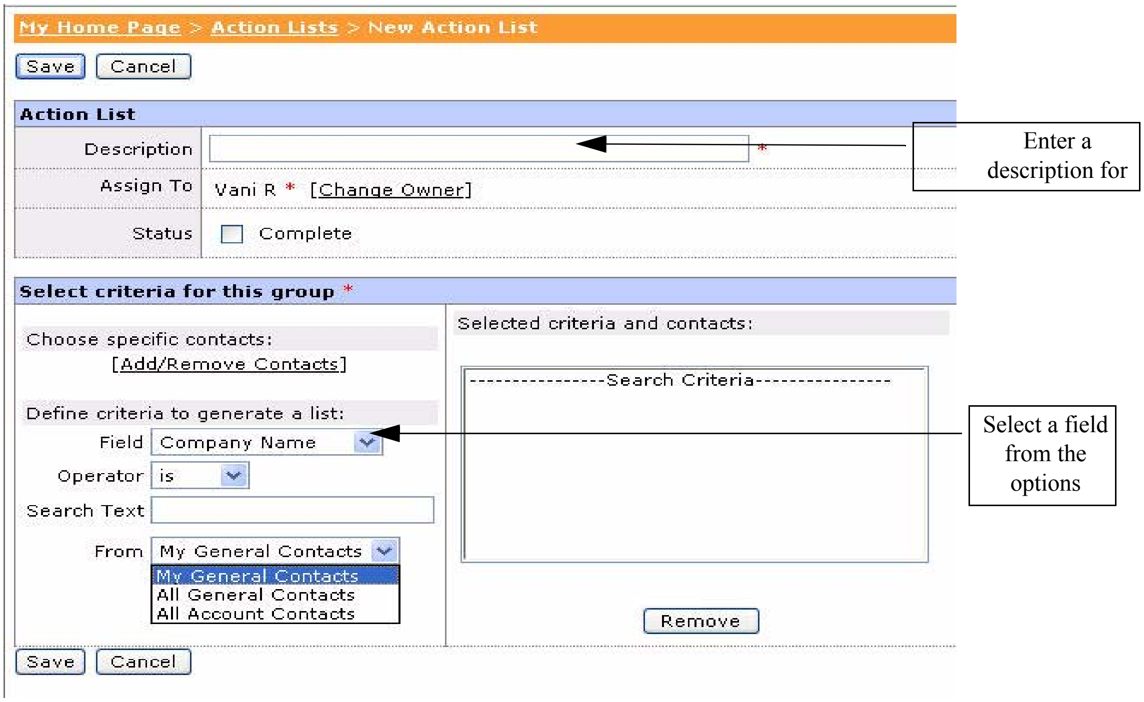


Figure 2.17 Add New Action List

The query interface provides an interface for building lists of contacts. Select from a variety of fields in the customer record, and define the query text. For example, you can select all contacts in the 23510 zip code by selecting **zip code** in the field options, **is** in the operator options and entering **23510** in the **Search Text** field. Select one of the options in the **From** list and click **Add**. The available options are: My General Contacts, All General Contacts and All Account Contacts. These options specify the contact groups from where you want to select the contacts. You can add as many criteria as you like, and Centric CRM will try to design the right query for you. You can also mix manually selected contacts with queries.

You can also go back and modify existing action lists using the **Modify List** link as shown in **Figure 2.13**.

2.6 Assigning Action Plans

Action plans consist of sequential tasks to be accomplished to carry out specific business activity, such as a product sale. The plan also explains in detail how to carry out each individual task. You can create action plans using the **Action Plan Editor**. These action plans can be reused as templates. For more information on using the **Action Plan Editor**, refer to **Section 15.6.2, "Using Action Plan Editor"**.

You can add new action plans in the **Accounts** module and **Help Desk** modules. For more information on adding new action plans, refer to **Section 6.9.1, "Adding an Action Plan"**.

Action plans created in the **Accounts** and **Help Desk** module can be accessed from **My Home Page** module. This module displays a dashboard that provides an overview of the assigned action plans for you, as shown in **Figure 2.18**. On selecting an action plan from the options, an overview of the plan is displayed in

My Dashboard specifying the number of phases and plans in each phase, as shown in Figure 2.18. The page also contains all accounts and help desk related action plans assigned to the selected user. The page gives the following details of action plans:

- The action plan name
- Action required
- Person assigned
- The prospect name
- Weekly potential details
- The current phase
- The days in phase
- The days active
- Values from plan
- The date and time when the plan was last updated.

The action plans requiring action are highlighted.

Figure 2.18 Action Plan Dashboard Page

2.7 Managing Re-Assignments

In any company, employees come and go from time to time. A good CRM system ensures that none of the company's critical business intelligence is lost with a departing employee.

Centric CRM provides a very sophisticated and flexible re-assignment system that makes it simple to re-assign files and data from one employee to another in case one employee leaves, or another joins. The **Re-assignments** sub-tab, as shown in **Figure 2.19**, enables you to re-assign the files and data to new employees without affecting the business flow.

For example, if a salesperson leaves your company after several years of employment, this person might have accumulated a large amount of business data including contact names and phone numbers, presentations, and quotations. All together, this data adds up to the total history of the salesperson's dealings with customers. The major issues at play are:

- If the data is stored only on the salesperson's laptop computer, the salesperson could walk out of your company with the data, then it may be lost permanently.
- If the data is in a CRM application, but cannot be re-assigned in bulk, then it may be lost in plain sight.
- If all the pertinent data is entered in to Centric CRM, then it will not be lost, and can be re-assigned to another employee.

Figure 2.19 Selecting the Re-Assignmets Sub-Tab

2.7.1 Using Re-Assignments

As a user, you are allowed to freely re-assign your own data, or that of employees who report to you. Clicking the **Re-assignments** sub-tab, displays the **Re-assignments** page is shown in **Figure 2.20**.

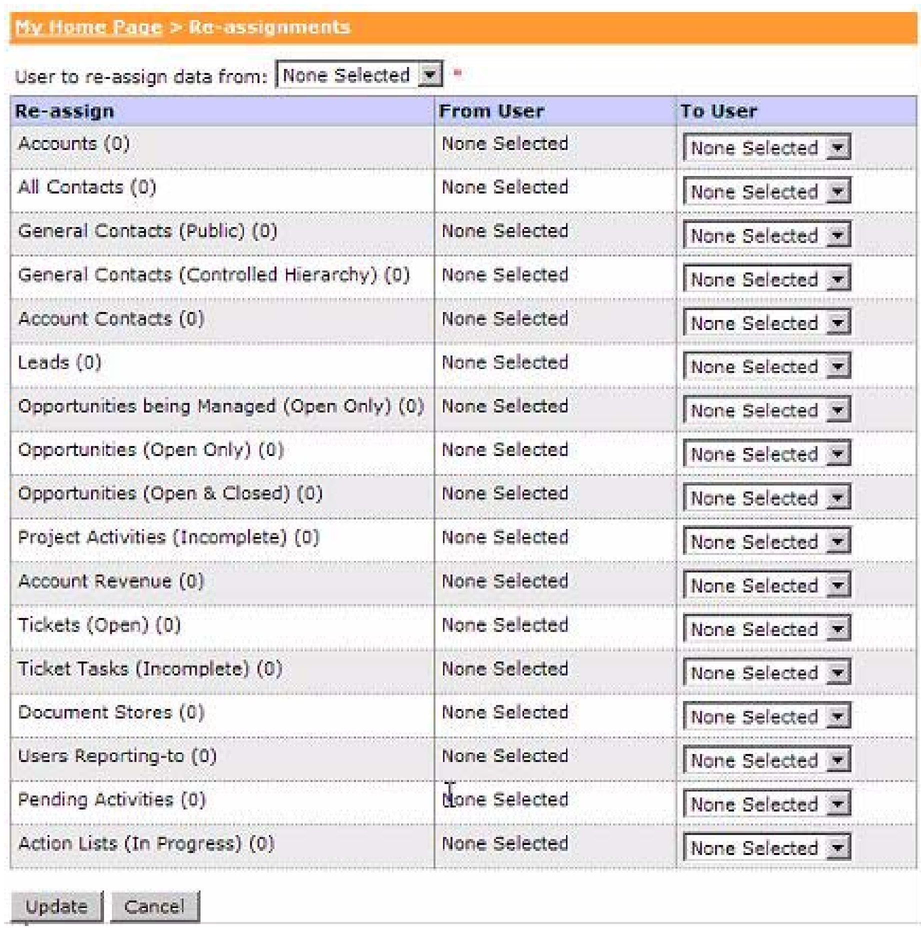


Figure 2.20 Re-Assignments Page

You must define from who you will re-assign data and to whom you will re-assign it. The options for re-assigning are as given below:

- Re-assign all the data to one person, or different categories to different people
- Re-assign only part of the data
- Re-assign responsibility for tickets to someone else and leave the rest as it is

To commit the re-assignment, click **Update** located at the bottom of the page. Click **Cancel** to abandon the changes.

2.8 Controlling Settings

The **Settings** sub-tab enables you to control several personal settings within Centric CRM, as shown in Figure 2.21. You can select from the following options:

- **Update my personal information**
- **Configure my location**
- **Change my password**
- **Accessing Web Folders**

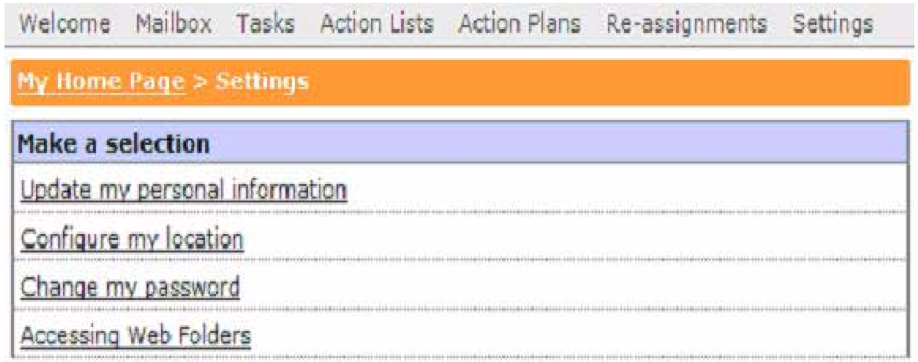


Figure 2.21 Settings

To view the settings page, click **Settings** from the sub-tabs on the menu bar.

2.8.1 Editing Personal Information

Centric CRM allows you to change all your personal (or employee) information, including the following attributes:

- Name
- Title
- Email addresses
- Phone numbers

Click **Update** to commit, and **Cancel** to quit. A sample of the information that can be modified is shown in Figure 2.22.

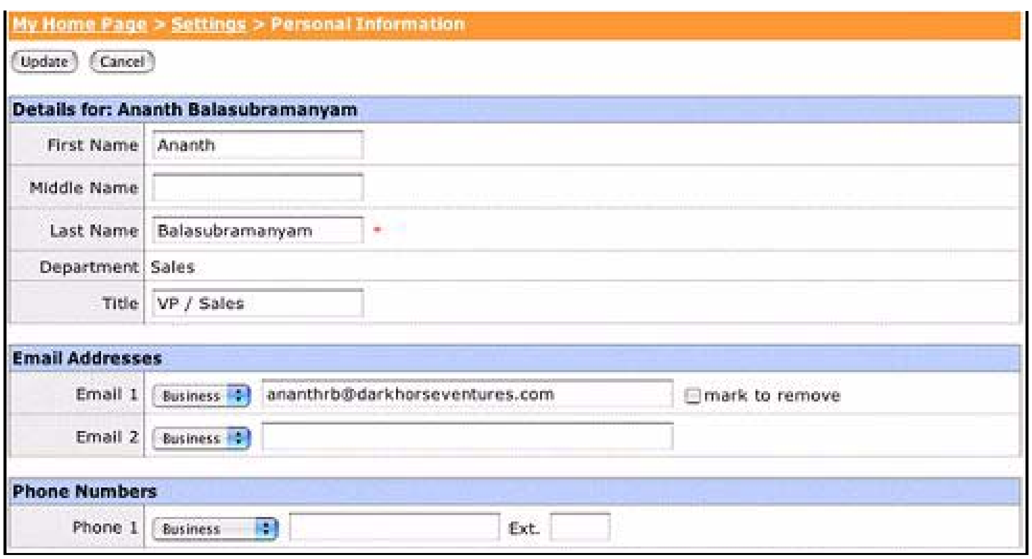


Figure 2.22 Updating Personal Information

2.8.2 Changing Location

The only variable you can change under **Location** is your time zone. Centric CRM will automatically translate time to your local time zone if you have set this variable, as shown in Figure 2.23.

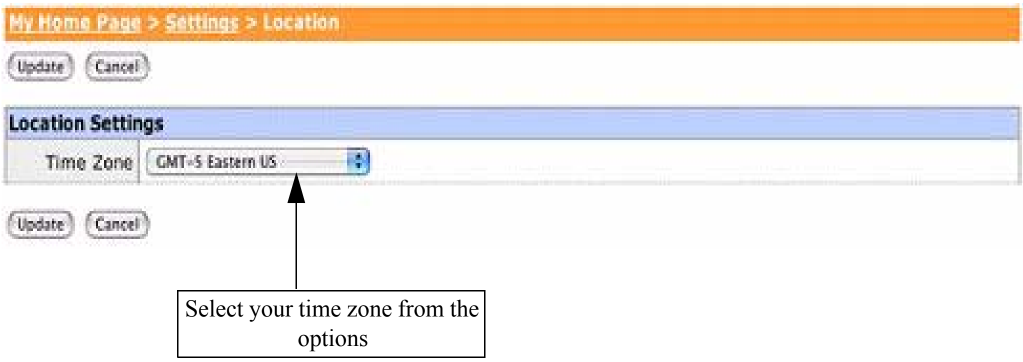


Figure 2.23 Configure Location

2.8.3 Changing Your Password

To change the password follow the steps given below:

1. Click **Change my password** in the menu.

   A form is displayed, as shown in Figure 2.24.

2. Type your current password and your new password twice (the second time to confirm).
3. Click **Update**.

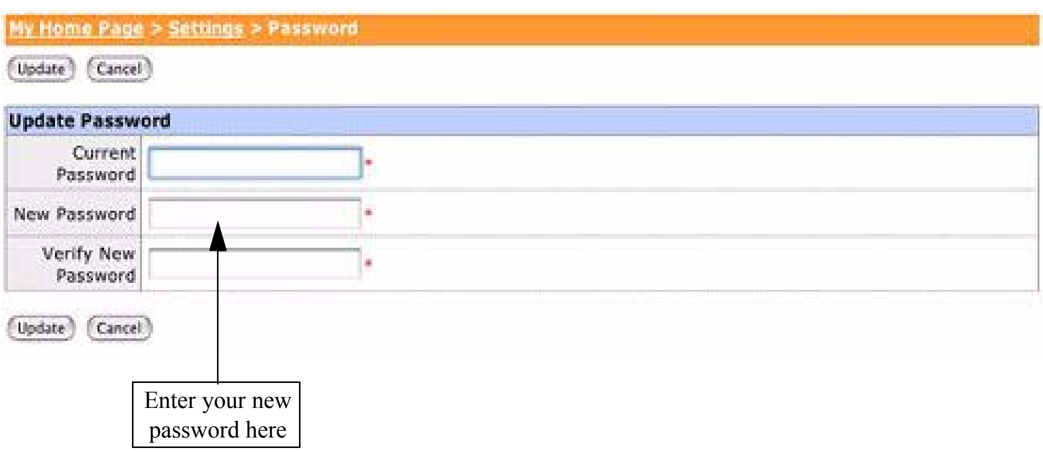


Figure 2.24 Change Password Form

2.8.4 Accessing Web Folders

To access the files and folders stored in Centric CRM under various modules, you must navigate to the respective modules. Click **Web Folders** to connect to Centric CRM externally. Once you successfully connect and authenticate yourself, you can access folders and files as if they were available on a network file share.

To access the web folders, you must have a WebDAV Client. A list of some WebDAV clients that have been used to work with Centric CRM's Web Folders is as follows:

- Mac OS X Finder
- Windows Web Folders
- Red Hat Konqueror Browser

Note: This feature uses WebDAV, a well known protocol that allows users to access files and folders with editing and versioning capabilities on a remote server.

To connect to Centric CRM's Web Folders using Mac OS X Finder follow the steps given below:

1. Click the **Accessing Web Folders** link.
2. Select the server as shown in **Figure 2.25**.
3. Click **Connect** and the solution requests authentication, as shown in **Figure 2.26**.
4. Enter the name and password and click **OK**.
5. Select the required file, as shown in **Figure 2.27**.
6. Select the contact, whose file you want to access, from the list, as shown in **Figure 2.28**.

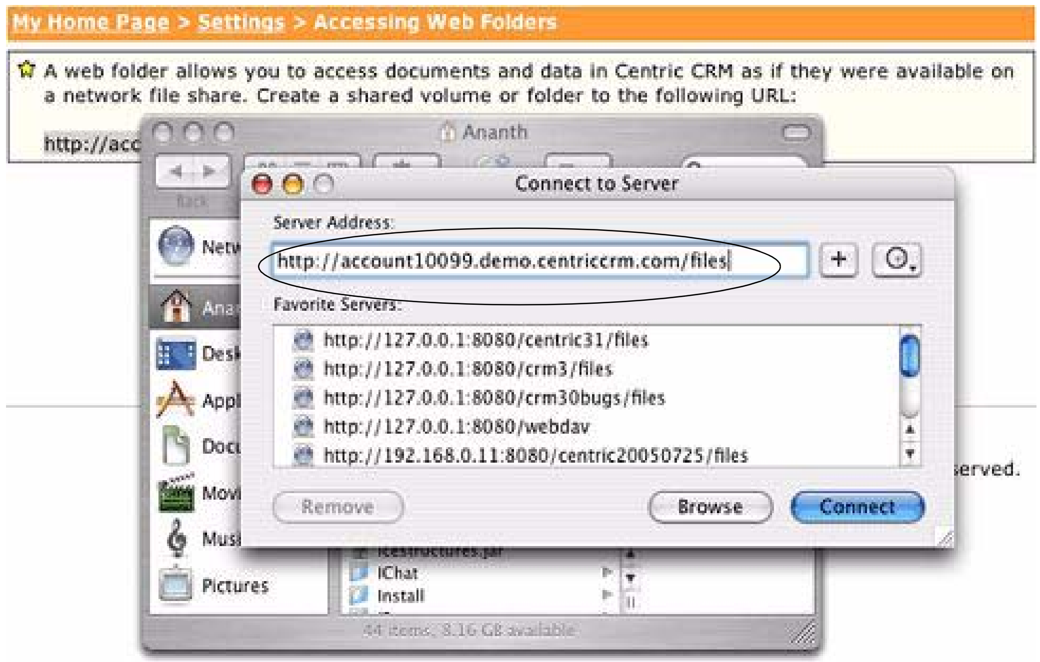


Figure 2.25 **Web Folders Server**

Figure 2.26 **WebDAV File System Authentication**

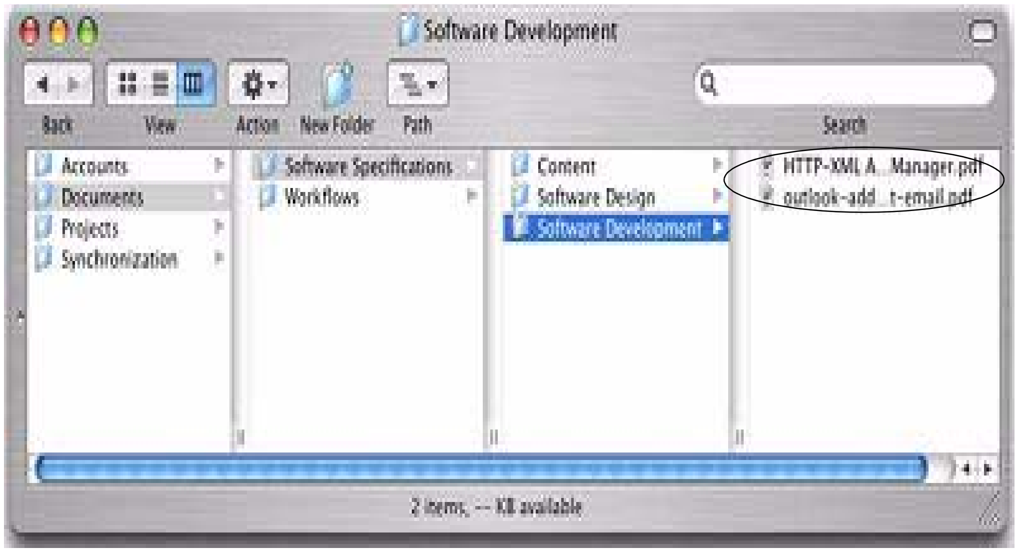


Figure 2.27 Document and File Upload

Figure 2.28 Contact vCards List

All the top-level modules in Centric CRM that have documents are displayed as folders. You can navigate through each module folder to access files specific to the module. You can download or add new files based on your read/write permissions.

The synchronization folder displays the following features:

- **Calendar**
- **Contacts**

The calendar folder displays a list of home page calendars. The list essentially contains your calendar and those of employees who report to you. You can download any of the calendars for viewing them offline.

The contacts folder displays a list of Contact vCards (contacts that you have access to in Centric CRM). You can download any vCard into your local address book application if it supports the vCard format.

CHAPTER
3

Managing Leads

This chapter provides information on the **Leads** module of Centric CRM. This module helps you work with prospective customers of your company and to monitor the efficiency of your business processes.

This chapter contains the following sections:

- Section 3.1, "How Does This Module Help You?"
- Section 3.2, "Understanding the Leads Home Page"
- Section 3.3, "Searching for a Lead"
- Section 3.4, "Adding a Lead"
- Section 3.5, "Importing Leads"
- Section 3.6, "Exporting Leads"

3.1 How Does This Module Help You?

Prospects are individuals who may have expressed interest in doing business with you or who you think might be future customers. To work with prospects effectively, you need to have an up-to-date information about the prospects and their business. Using the Leads module, you can record all relevant details of your prospective customers. Authorized employees can view useful information including the efficiency statistics that help them in converting prospects into actual customers.

The **Leads** module provides the necessary tools to manage lead information right across the pre-sales process, from the acquisition of a prospective client, to conversion of the prospect into a customer. The **Import** feature is a useful tool that enables you to bulk-import leads, saving time and effort.

Clicking the **Leads** tab displays the **Leads** menu bar, which enables you to navigate through the leads module, as shown in Figure 3.1.

Figure 3.1 Accessing the Leads Module

3.2 Understanding the Leads Home Page

The **Leads** home page has a dashboard area on the left, and a listing of leads on the right, one per line.

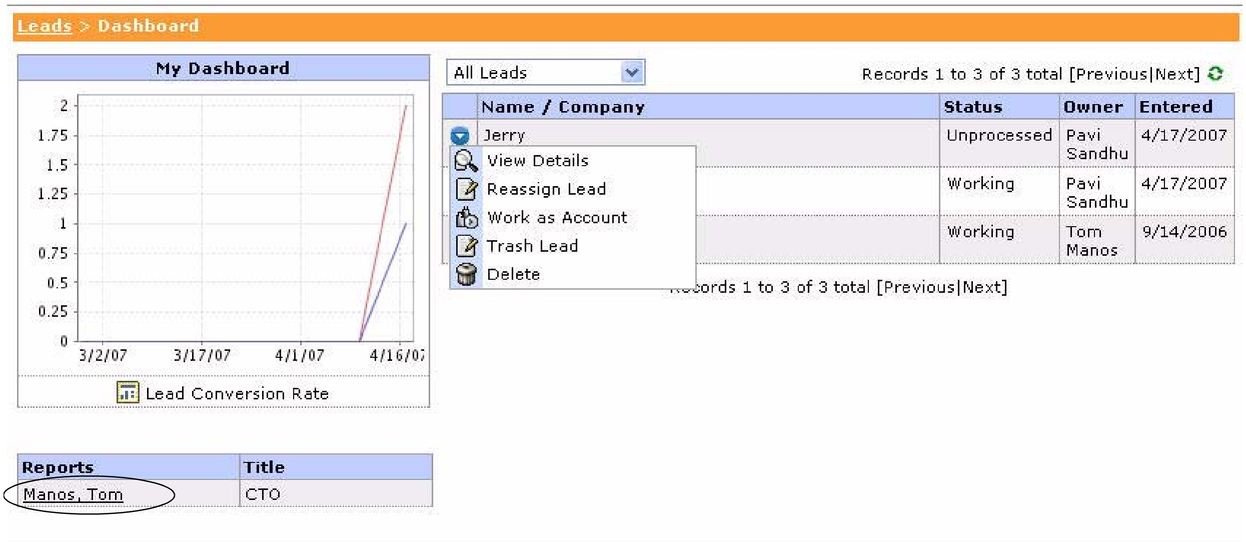


Figure 3.2 Leads Dashboard

My Dashboard displays a graph that represents the Lead Conversion Rate - an indicator of the number of leads being turned into valuable contacts on a daily basis.

The graph considers all users who report to you. The components of the graph are explained below:

- The blue line represents the total number of conversions by you as well as all the people reporting to you.
- The red line represents the number of conversions by your subordinates.
- The difference between the two values, which is represented by both lines at any point on the graph, determines your number of conversions for a specific day.

A table below the graph contains a list of user links for staff members who report to you. You can view any of your subordinates' dashboards by clicking the links located below the graph, as shown in Figure 3.2. The selected employee's dashboard displays a graph with a red line.

Clicking **Up one level** brings you back to your own dashboard page. This drill-down feature allows you to track the prospect conversion performance of your subordinates.

The leads list to the right of the graph displays the leads that are registered in the application. You can decide to view the following information:

Owned/Read Leads - filters the list to display leads that are owned by you, or the ones that have been read.

- **All Leads -** all the leads registered in the application

The leads dashboard displays information on leads and accounts (converted prospects) in a single list. All accounts have the status Working. Leads can have a status of **Unprocessed**, **Assigned**, or **Archived**. The actions that can be performed on a lead are:

- **View Details**. This option enables you to view details of the lead.
- **Reassign/Assign Lead**. This option enables you to assign the lead to any user, who has access to the **Leads** module in the system.
- **Convert to Account**. This option enables you to consolidate the lead into an account, and create an action plan to work on the new account.
- **Archive Lead**. This option enables you to mark the lead as **Archived** to indicate that the marked lead is not useful.

  Archived leads can be deleted at a later date.
- **Delete**. This option enables you to delete the lead from the system. Selecting this option displays a pop-up window to confirm the deletion of the lead.

These options enable you to work with leads while having a complete overview in the dashboard.

3.3 Searching for a Lead

The **Search** link located on the menu bar enables you to view leads that match certain specific criteria. Clicking **Search** displays the **Search Leads** page, in which you set the search criteria and sort order, as shown in Figure 3.3.

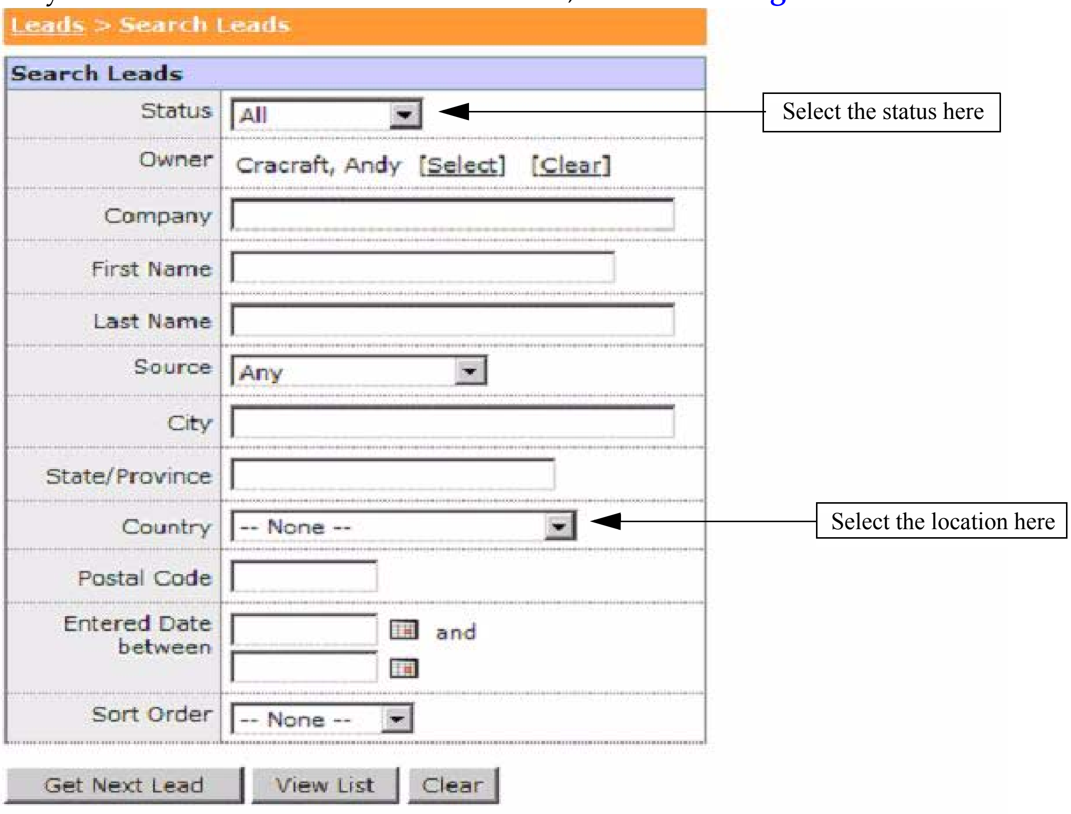


Figure 3.3 Search Leads Page

Clicking **Get Next Lead** displays the next available lead in the system that matches the search criteria, as shown in Figure 3.4. This option enables you to bypass the leads list and work directly on a specific lead.

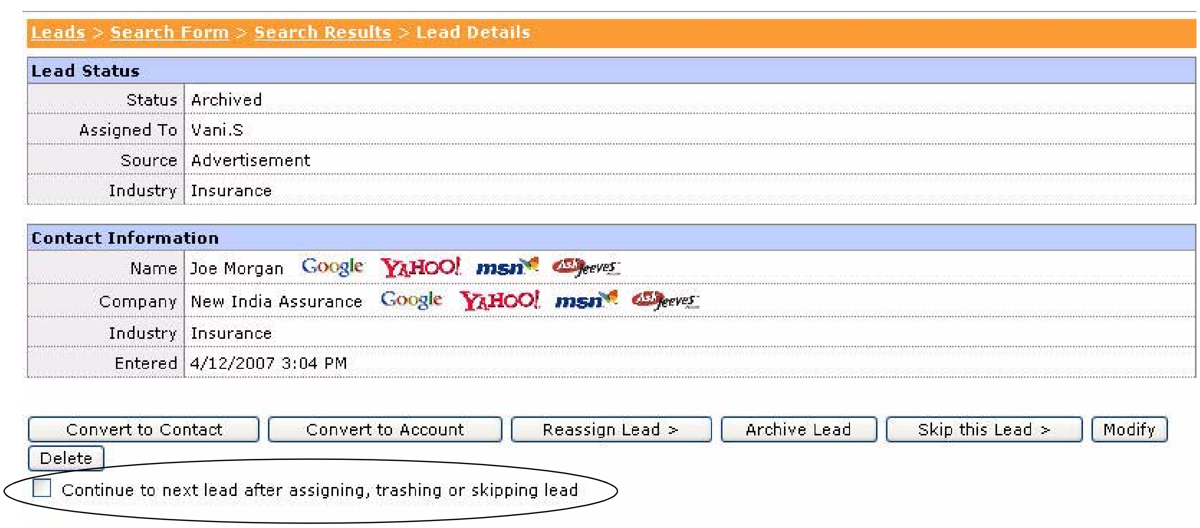


Figure 3.4 Lead Details Page

The checkbox **Continue to next lead after assigning, trashing or skipping lead** is displayed, as shown in **Figure 3.4**. Clicking this option causes the details of the next available lead that satisfies your original search criteria to be displayed once you assign, trash, or skip the lead whose details you are viewing. When this checkbox is left unchecked, when you assign, trash or skip the lead, you will be returned to the Leads list instead of the Details page for the next lead.

Clicking **View List** displays all the leads that match the search criteria, as shown in **Figure 3.5**.

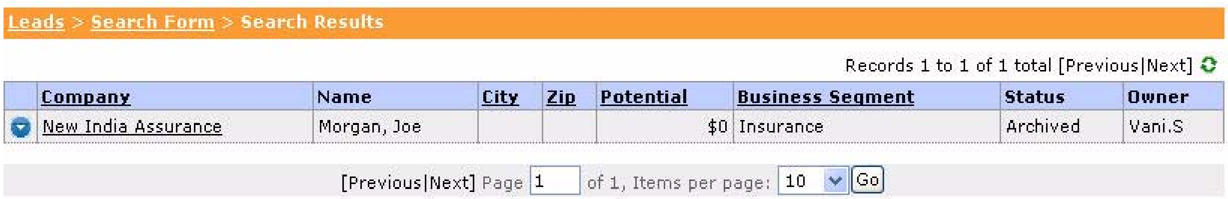


Figure 3.5 Search Results Page

For further information on viewing lead details, refer to **"Viewing Lead Details"**.

Clicking **Clear** clears the form and enables you to specify new search criteria.

3.4 Adding a Lead

To add a lead, click **Add** on the menu bar. An **Add Lead** page is displayed, as shown in **Figure 3.6**.

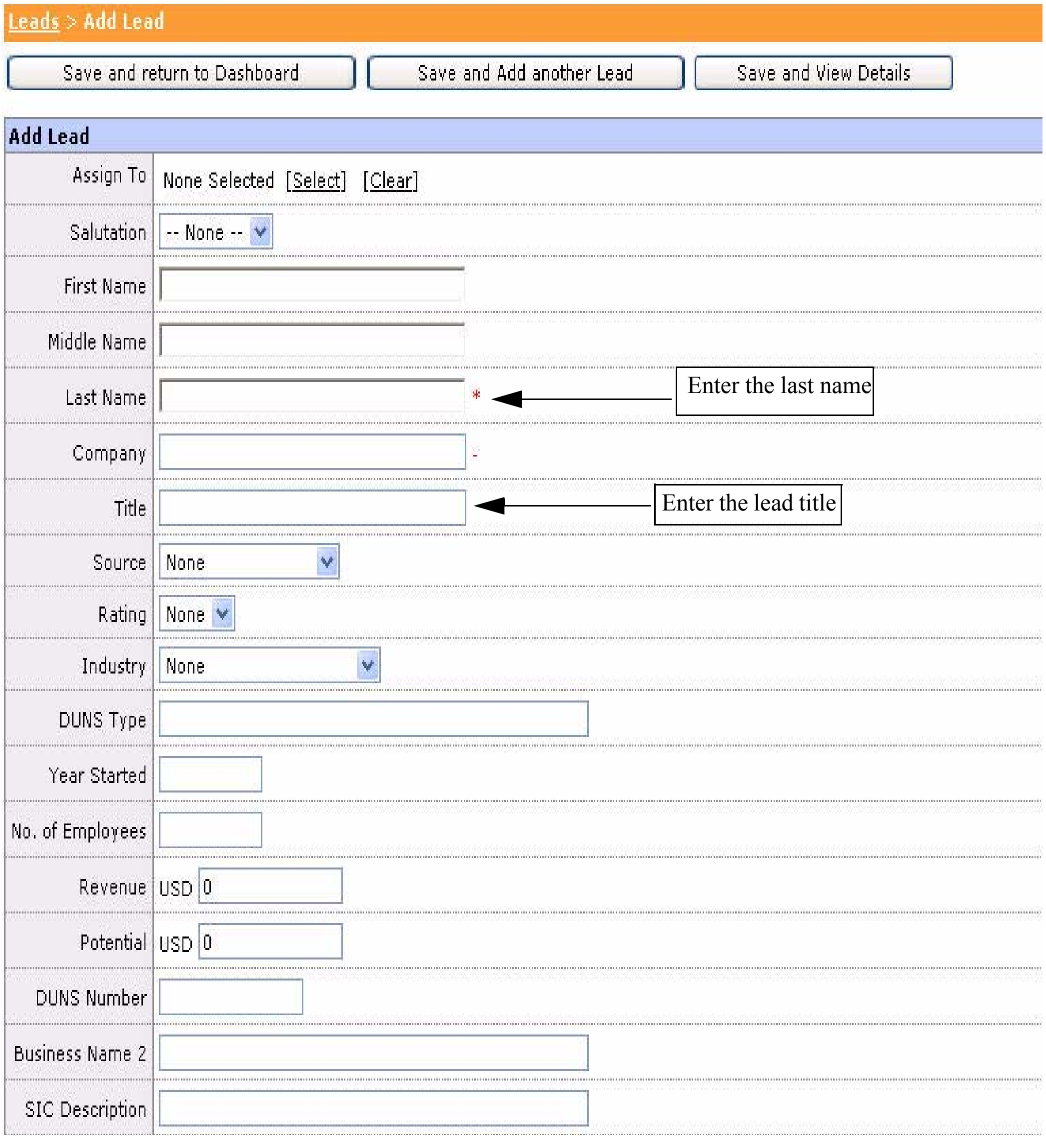


Figure 3.6 Add Lead Page

To add a lead, enter the following details:

- Lead name and business names.
- Lead's company and title.
- Source of information, rating, and comments.
- Contact information. Details such as phone numbers, E-mail addresses, IM addresses, postal addresses,
- Other relevant information such as revenue, potential, year started, SIC description, Data Universal Numbering System (DUNS) number and type.

  DUNS is a unique 9 character identification number provided to all registered vendors by Dun and Bradstreet.

A newly added lead is automatically given the status Unprocessed. Unprocessed lead records are made available to all users with access to lead records.

3.4.1 Viewing Lead Details

You can view the lead details from the **Dashboard** page or from the **Search Results** page.

When you click the action icon beside the lead name on any of these pages, a context menu is displayed. To view the lead details, select **View Details** from this menu. The lead's contact information and current status is displayed, as shown in Figure 3.7.

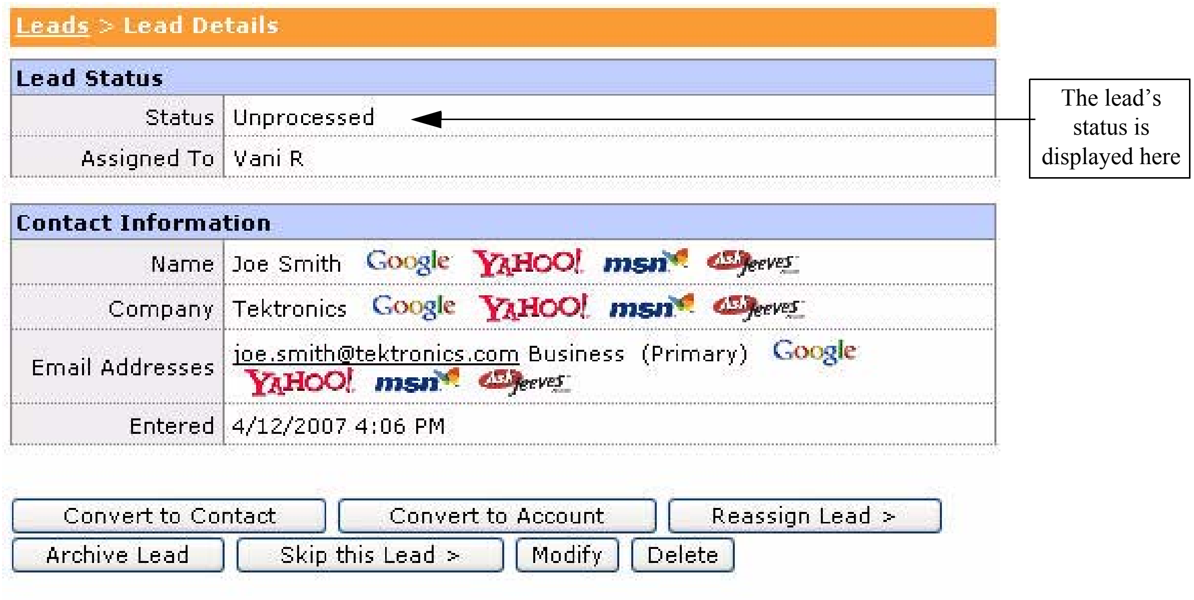


Figure 3.7 Lead Details

Clicking the logos of popular search engines, such as Google, Yahoo!, MSN, and Ask Jeeves, as shown in Figure 3.7 launches a search based on the field's contents, using the corresponding search engine.

While viewing a lead's details, you can select the following options:

- **Convert to Contact**. This option can be clicked to turn the lead into a general contact.

  The lead will be displayed as a regular contact in **Leads** and you can perform all contact-related operations, based on your permissions. Converting the lead into a contact enables you to associate **Opportunities** and **Activities** against this lead that has been converted into a contact.

- **Convert to Account**. This option can be selected to turn the lead into a contact associated with an account, as shown in Figure 3.7.

  If an account with the same company name, as that of this lead, does not already exist, the account will be added automatically. The lead will be displayed as a contact associated with an account in **Leads** and you can perform all account related operations based on your permissions. Converting a lead to an account enables you to create and work on action plans for the accounts, opportunities, and activities against the lead that was converted into an account.

- **Re-Assign Lead**. This option can be selected to re-assign the lead to a specific user having access to the **Leads** module.
- **Archive Lead**. This option can be selected to set the status of the lead as **Archived,** when you consider the lead as somebody not worth following-up.
- **Skip this Lead**. This option can be selected if you have not taken a decision about a lead, and you would like to proceed to the next lead.
- **Modify.** This option enables you to modify the details of the lead.
- **Delete**. This option can be selected to delete a lead, if you do not require the lead in the future. Selecting this option displays a pop-up window to confirm the deletion of the lead.

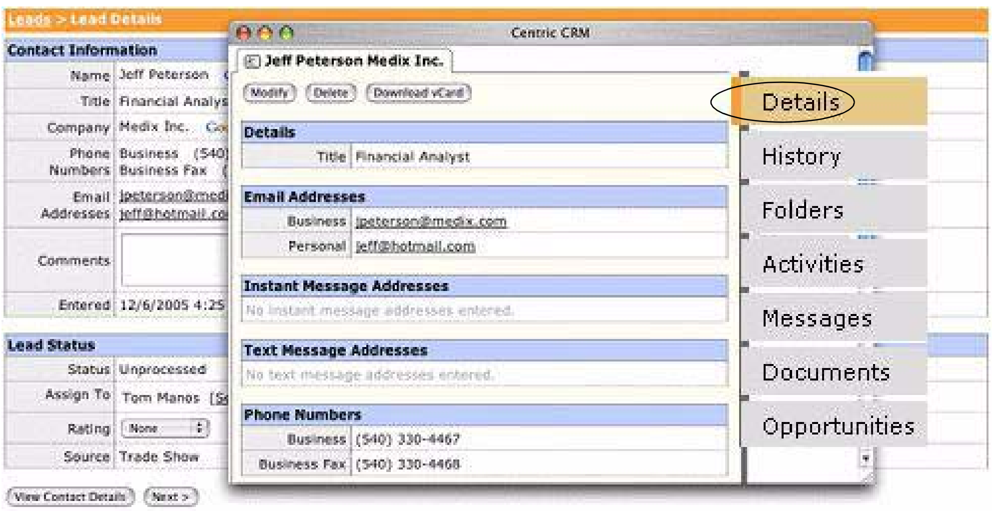


Figure 3.8 Convert to Contact

3.5 Importing Leads

The **Leads** module provides an **Import** feature that enables you to import lead details from an external source, saved in a Comma Separated Values (`.csv`) file into Centric CRM. This module also provides record validation by enforcing certain business rules during the import process.

To import a lead follow the steps listed below:

1. Click **Import** on the menu bar. Select **New Import**.

   The **New Import** page is displayed, as shown in Figure 3.9. Enter the required information for an import, such as **Name**, a short description, comments, **Source**, **Rating** and **Site**.

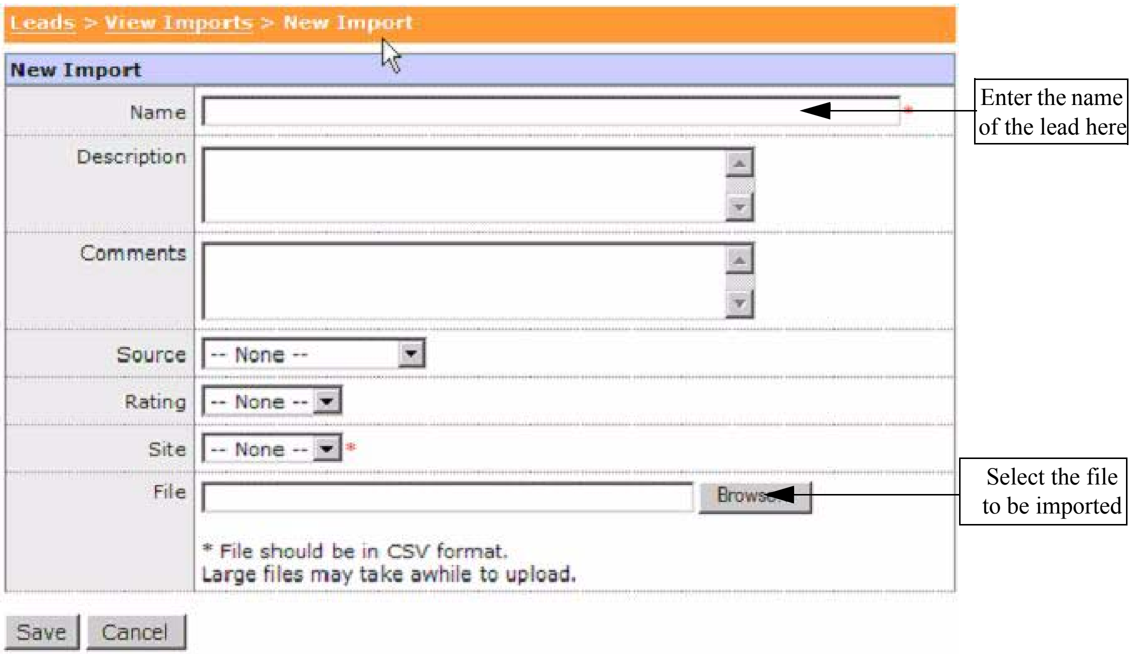


Figure 3.9 Lead Import Page

2. Click Browse and select the file to be imported.

Note: The file must be a valid CSV file, and its first line must contain column names to enable data mapping to the Centric CRM database.

---

3. Click **Save** to upload the import file to the database.

   If no error occurs during the upload, the **Upload Complete** screen is displayed, as shown in **Figure 3.10**.

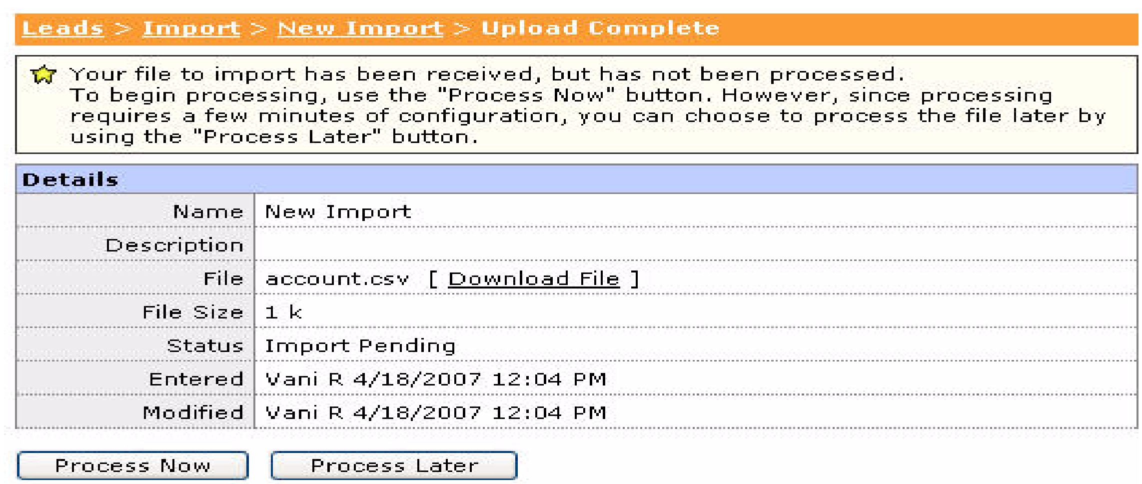


Figure 3.10 Lead Import - File Upload Complete

4. To view a lead import's details, select one of the following options:
   - **Process Now**. Click this button to initiate processing of records available in the imported `.csv` file.
   - **Process Later**. Check this button to save an import session for processing later.

   Selecting the **Process Now** option takes you to the **Process Import** page.
5. Field Mapping allows you to define a correspondence between fields from your import file and Centric CRM's lead attributes, as shown in **Figure 3.11**.

Figure 3.11 Lead Import Processing Screen

6. Click **Process** to begin the processing of records in the `.csv` file.

   You are redirected to the **View Imports** page, where a list of all the imported files is displayed. A detailed list containing the following details is displayed, as shown in **Figure 3.12**:

Figure 3.12 **Viewing the List of Imported Files**

- **Name**
- **Status**
- Results
- Last date of entry
- Modification details

The **Status** field describes the following state of the import sessions:

- **Import Pending**. This field indicates that the import file is uploaded, but not yet processed.
- **Running**. This field indicates that the import file is being processed.
- **Pending Approval**. This field indicates that the import file has been successfully processed, but the results have to be approved before the leads are actually made available to all.
- **Approved**. This field option indicates that the import results have been reviewed by a system user and approved.

The **Results** field gives the number of total records, successful and unsuccessful records corresponding to the imported file.

7. Click the name of the imported file, as shown in **Figure 3.12**.

   The **Import Details** page is displayed, as shown in **Figure 3.13**.

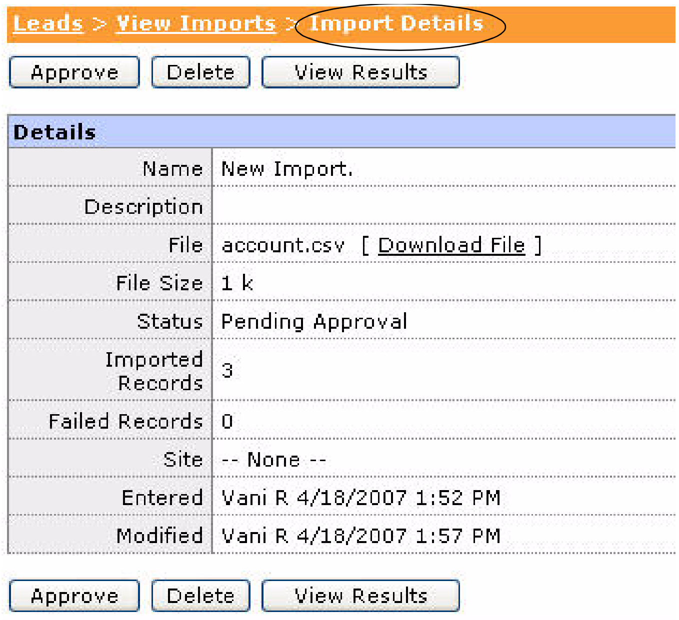


Figure 3.13 Lead Import Details

8. Click **Approve** to approve the imported file. Approving the import will make the leads available to all the users with access to the **Leads** module.

   The **Import Details** page with the option to view the results is displayed, as shown in Figure 3.14.

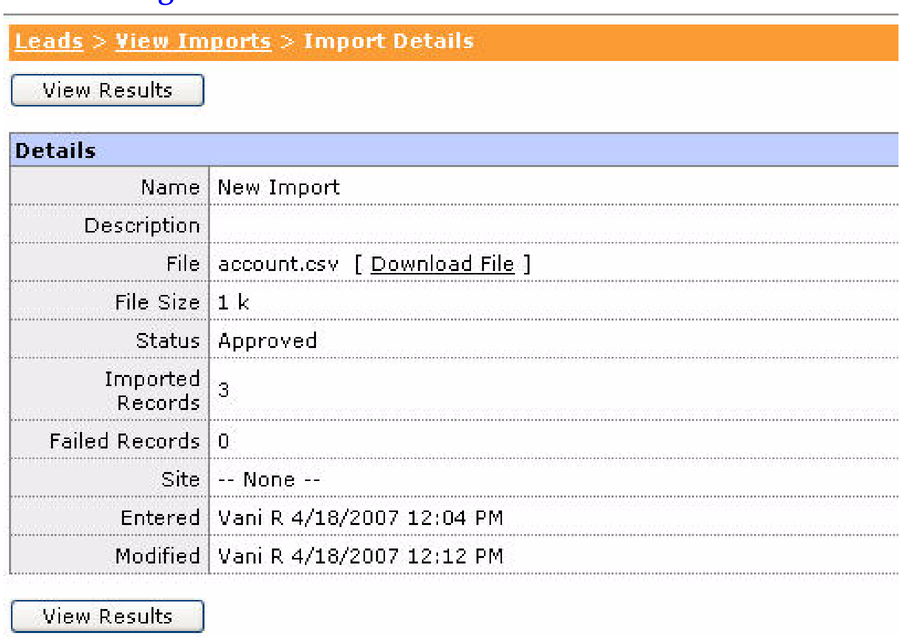


Figure 3.14 Viewing the Status of the Imported File

9. Click **View Results.**

   The **View Results** Page displaying the records of the imported file can be seen, as shown in Figure 3.15.

Figure 3.15 Lead Import Results

3.6 Exporting Leads

This feature enables you to export lead details. Click **Export** on the menu bar, to view a list of all data that has been exported, as shown in Figure 3.16. The list also displays the following details:

- Size of the exported data
- Date of creation of data
- Person who created the data

The available sections in the export leads feature are:

- **My Exported Data**
- **All Exported Data**

Figure 3.16 Exported Data List

To export new data, follow the steps listed below:

1. Click the **Generate new export** link, as shown in Figure 3.16.

   The **New Export** page is displayed, as shown in Figure 3.17.

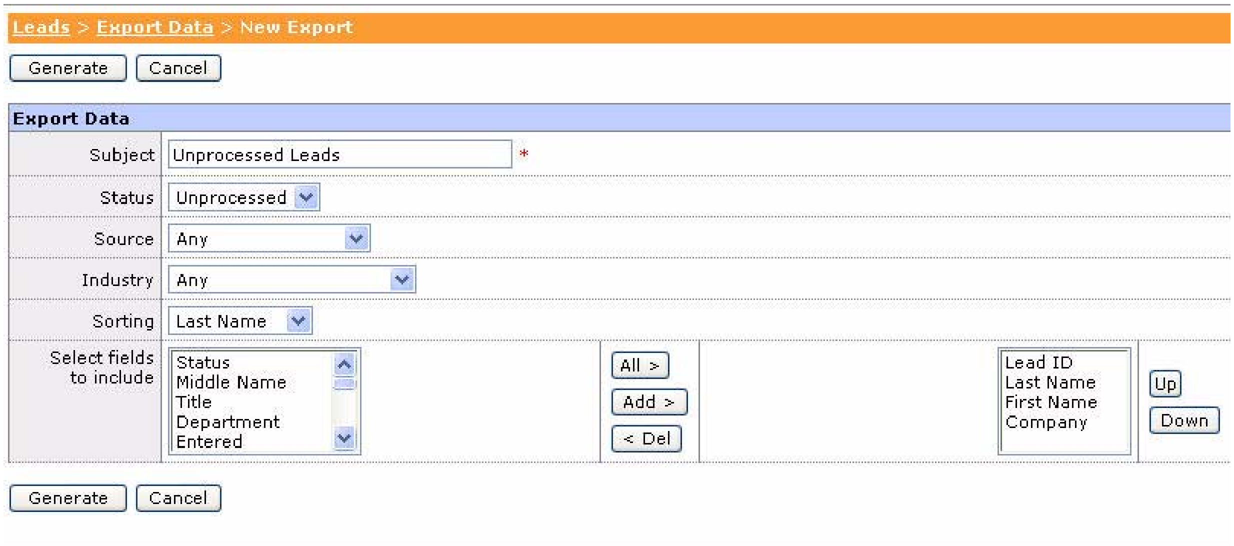


Figure 3.17 New Export Page

2. Specify the type and criteria, enter the subject, select the fields to be included, and specify the field for sorting the contacts. Click **Generate** to generate the new export.

   The exported file is listed on the **Export Data page**, as shown in **Figure 3.18**. The data can be viewed or downloaded as a .CSV file.

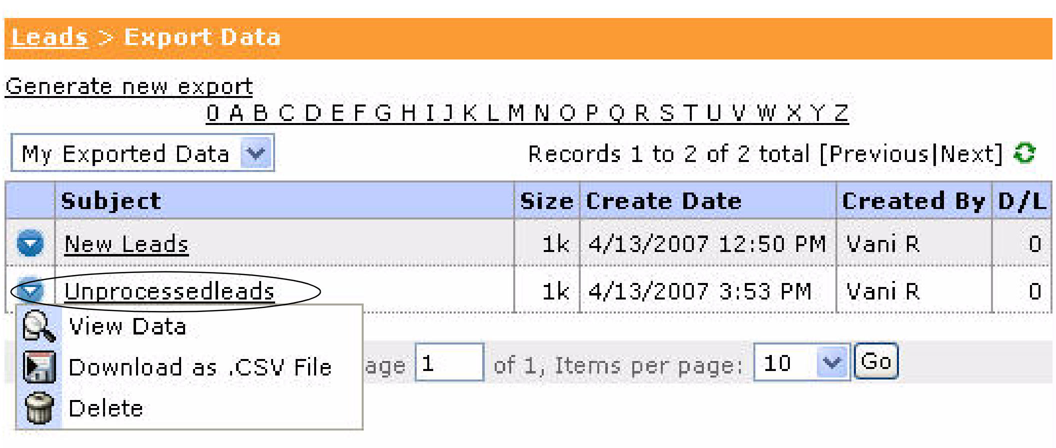


Figure 3.18 Viewing the New Export File

CHAPTER

4

Managing Contacts

This chapter provides information on the **Contacts** module of Centric CRM. The **Contacts** module enables you to manage information about your contacts. You can store contact details and monitor their activities.

This chapter contains the following sections:

- **Section 4.1, "How Does This Module Help You?"**
- **Section 4.2, "Searching for Contacts"**
- **Section 4.3, "Viewing History"**
- **Section 4.4, "Using Contact Folders"**
- **Section 4.5, "Recording and Planning Activities"**
- **Section 4.6, "Sending Messages"**
- **Section 4.7, "Adding and Accessing Documents"**
- **Section 4.8, "Viewing Opportunities"**
- **Section 4.9, "Importing Contacts"**
- **Section 4.10, "Exporting Contacts"**

4.1 How Does This Module Help You?

Centric CRM models the customer life cycle, which starts with contacts. Often, a customer begins as a casually met contact, and may later turn into an account. For example, in a retail setting, potential customers may walk in to browse your merchandise. Some customers may purchase immediately and others may not, but capturing relevant information about all of them will make it easier to convert contacts into accounts. Contacts can also include general acquaintances, competitors, shareholders and vendors.

The **Contacts** module helps in tracking the following details:

- Name
- Email addresses
- Phone numbers
- Mailing Addresses
- Notes

- Calls
- Meetings
- Appointments
- Faxes

The **Contacts** module gathers all opportunity records associated with the contact in one place. This module also provides a historical record of all messages sent from the **Communications** module.

You can define and populate as many folders for contacts as you need. The **Contacts Page** enables you to enter contact information. These capabilities are discussed in detail in the rest of this chapter.

4.2 Searching for Contacts

You can access the contacts module by selecting the **Contacts** tab, as shown in Figure 4.1.

Figure 4.1 Contacts Menu Bar

When you click the **Contacts** tab, the **Search Contacts** page is displayed, as shown in Figure 4.2. You can search for contacts by specifying the search criteria. The more information you enter in the search query form, the more refined your search becomes.

You can search for a contact by entering one or more of the details as specified below:

- **First Name**
- **Middle Name**
- **Last Name**
- **Company**
- **Title**
- **Contact Type**
- **Source**, which includes the following options:
  - **My Contacts** - your contacts
  - **All Contacts -** all the contacts in the system
  - **Controlled Hierarchy Contacts** - contacts of a hierarchy.

  For example, if you are the manager you can view contacts of employees reporting to you.

When you enter a partial name in an input field, the system executes the search and returns all results with your search term anywhere in the field. For example, entering "or" in the first name field displays all contacts with "or" in their first names, such as George, Gordon, and Lorna. To view all the contacts in the system, leave all fields blank, and click **Search**.

Caution: In applications with a large contact database, using blank fields to search for contacts may be time consuming.

Contact Type provides many options to refine your search. The options available are:

- Contact Types - This category includes options, such as acquaintances, competitors, shareholders and vendors
- Account Contact Types - this category includes all contacts associated with an account.
- All Contact Types - this category includes **Contact** Types and **Account** Types

Figure 4.2 Search Contacts Page

4.2.1 Viewing Contact Search Results

The **Search Results** page, resulting from a set of criteria specified during the search, is shown in Figure 4.3. The search results can be sorted by name or company, using the field headers at the top of the results page. When you click the action icon, a context menu is displayed, which contains the following task options:

- **View** - to view the details of the contact
- **Modify** - to edit the details of the contact
- **Clone** - to duplicate the contact
- **Delete** - to remove the contact from your database
- **Download vCard** - to download the details of the contact in vCard format

- **Send Address Request** - enables you to send a message to the contact

You can add a new contact by clicking the **Add a Contact** link, as shown in **Figure 4.3** or the **Add** link on the menu bar.

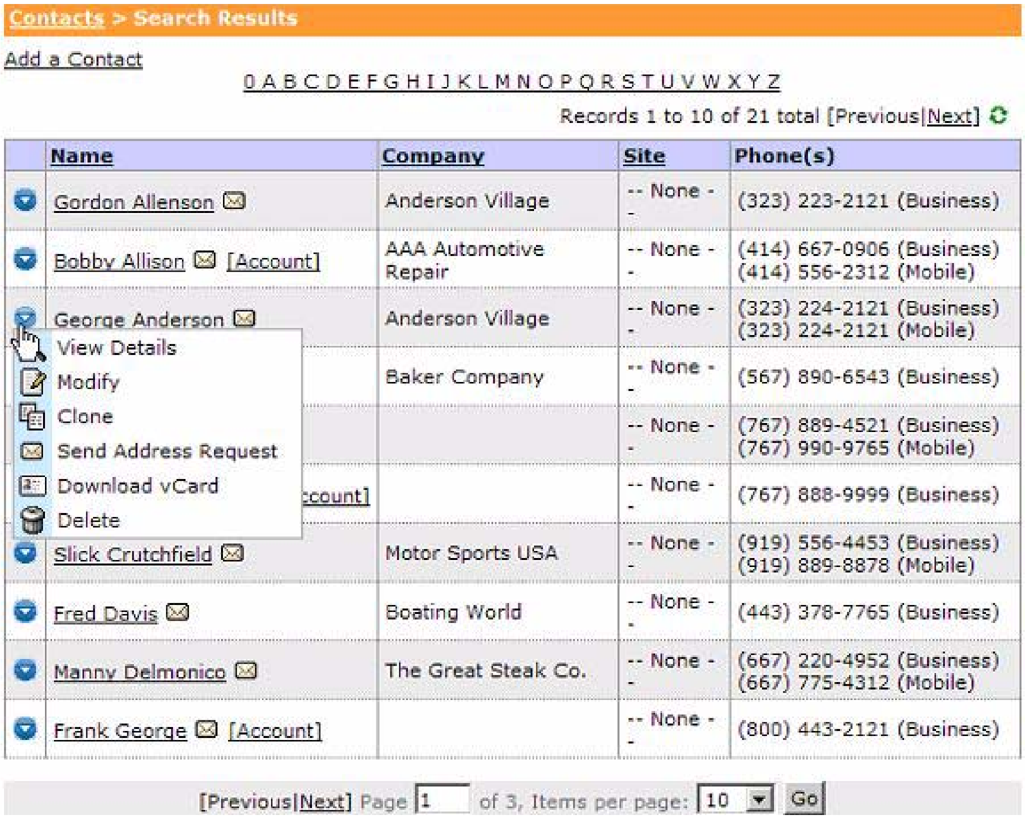


Figure 4.3 Contact Search Results

4.2.2 Viewing Contacts

Clicking a contact name in the search results displays the **Contact Details** page, as shown in **Figure 4.4**.

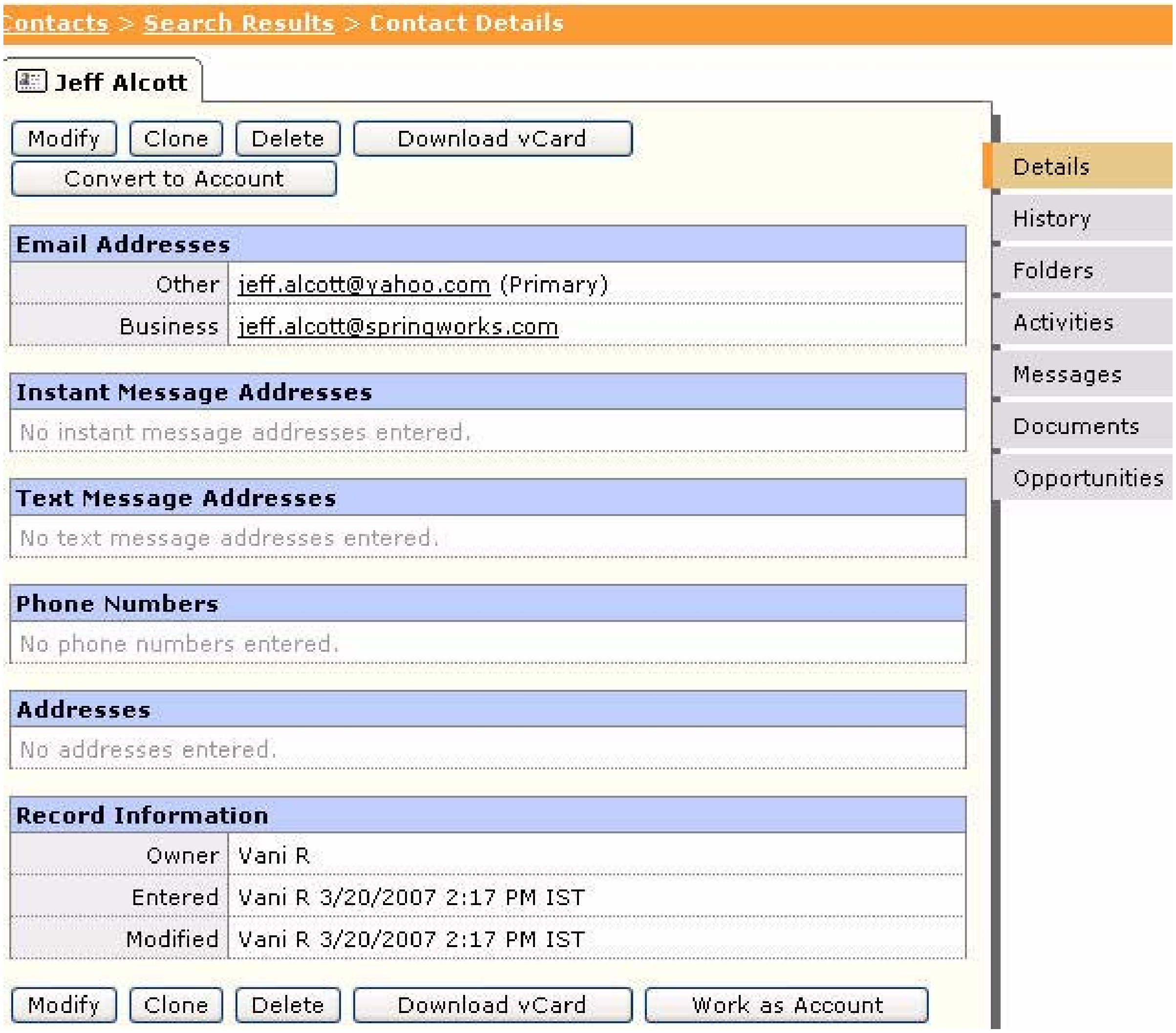


Figure 4.4 Contact Details

You can modify, clone or delete the contact using the options available in the **Contact Details** page. The **Contact Details** page also contains the following set of tabs:

- **Details.** You can select this sub-tab to view the details of the contact.
- **History**. You can select this sub-tab to view information related to a contact till date. For more information on the **History** tab, refer to **"Viewing History"**.
- **Folders**. You can select this sub-tab to view the all the folders created in this module. For more information on using folders, refer to **"Using Contact Folders"**.
- **Activities.** You can select this sub-tab to record and schedule activities. For more information on **Activities**, refer to **"Recording and Planning Activities"**.
- **Messages**. You can select this sub-tab to view the messages sent to and received from the contacts. For more information on the **Messages** tab, refer to **"Sending Messages"**.

- **Documents**. You can select this sub-tab to view the a list of folders and attached documents relevant to the contact. For more information on accessing documents, refer to **"Adding and Accessing Documents"**.
- **Opportunities**. You can select this sub-tab to view opportunities associated with this contact. For more information on opportunities, refer to **"Viewing Opportunities"**.

4.2.3 Modifying Contacts

The **Modify** button on the **Contact Details** page enables you to modify the contact details. Click **Modify** to display the **Modify Contact** page, as shown in **Figure 4.5**. You can modify the following information:

- Personal information - details such as names and birthday
- Official information - details such as role and title
- Contact information - details such as phone numbers, email addresses, mailing address, and IM address
- Additional information - notes

Click **Update** to save the changes or click **Cancel** to return to previous page without saving changes.

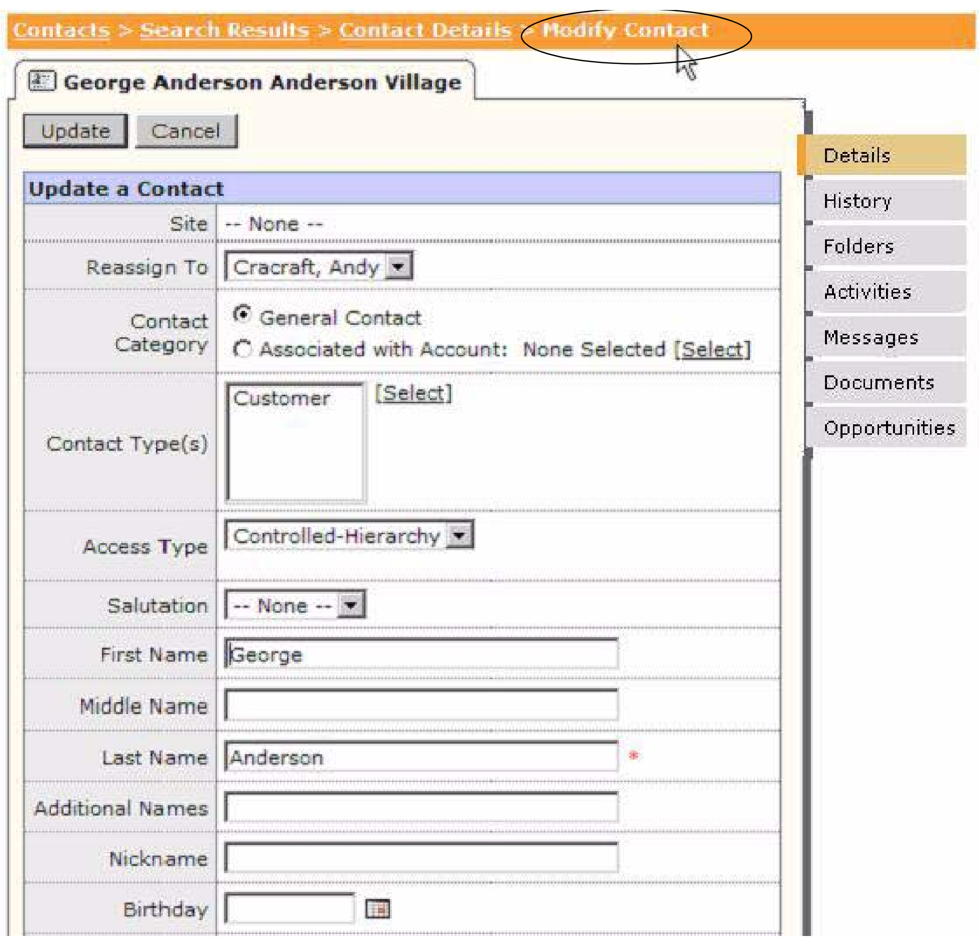


Figure 4.5 Modifying a Contact

4.2.4 Cloning Contacts

Contact cloning is a feature that enables you to add new contacts from the same company without having to re-enter common information, such as the company name, and company address.

You can create another contact similar to the one you are viewing, by clicking **Clone** on the **Contact Details** page. The name of the company, email address, mailing address, and phone numbers are entered automatically from the current contact.

4.2.5 Deleting Contacts

You can delete a contact that is no longer required, by clicking **Delete** on the **Contact Details** page. Centric CRM will display a warning to confirm the deletion.

4.2.6 Downloading a vCard

A vCard is an electronic business card containing the following information:

- Geographic and time zone information
- Multiple languages support, which enables you to view the details in the language of your choice.

You can download a contact's vCard in a `.VCF` format to your laptop, desktop, and other communication tools, such as phones and palmtops. Click **Download vCard** and select from the options whether you want to open the vCard or save the same, as shown in **Figure 4.6**.

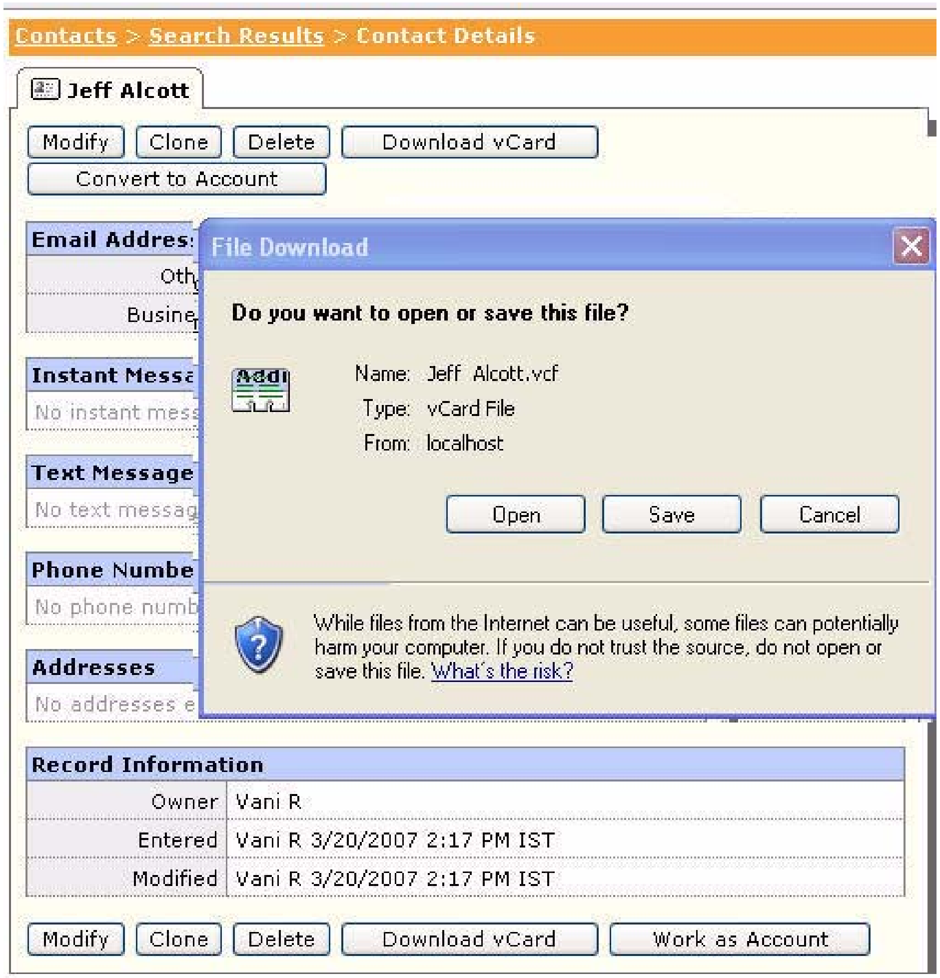


Figure 4.6 Download vCard Dialog

On selecting **Open**, a pop-up window is displayed as shown in **Figure 4.7**.

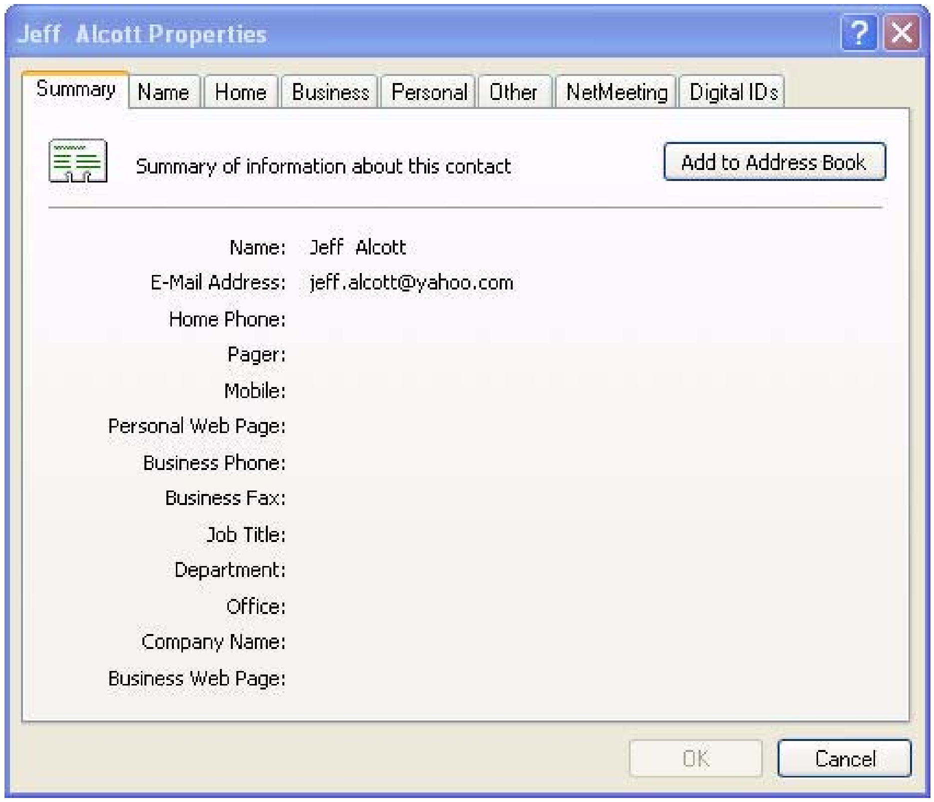


Figure 4.7 Viewing the vCard

4.3 Viewing History

You can access the **History** page by clicking the **History** sub-tab on the **Contact Details** Page, as shown in **Figure 4.8**. History enables you to view information related to a contact till date.

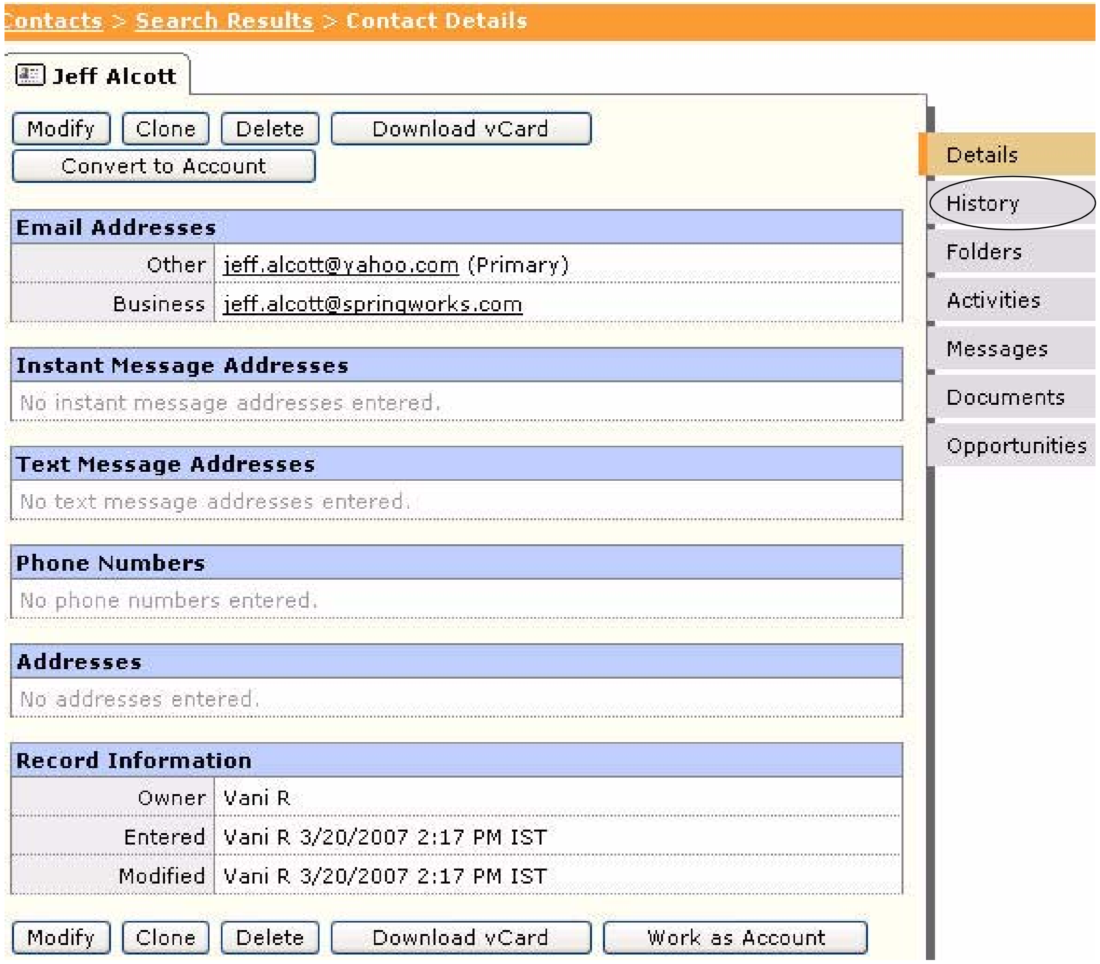


Figure 4.8 Accessing History From the Contact Details Page

Using the **History** sub-tab, you can view the history of a contact. This sub-tab provides the following information, as shown in **Figure 4.9**:

- Notes
- Activities
- Tickets
- Assets
- Quotes
- Opportunities
- Tasks
- Service Contracts
- Messages

You can add a note by clicking **Add a note,** as shown in **Figure 4.9.**

You can view a specific set of history items by setting a filter. Click **Filters** to set a filter. You can set a filter, by selecting the relevant checkboxes as shown in **Figure 4.9**. To activate the filter, click **Apply Filter**.

You have the option of clearing or checking all the filters. The page displays all the filtered data with the following information:

- Brief description
- Contact information
- Last date of entry
- Last date of modification

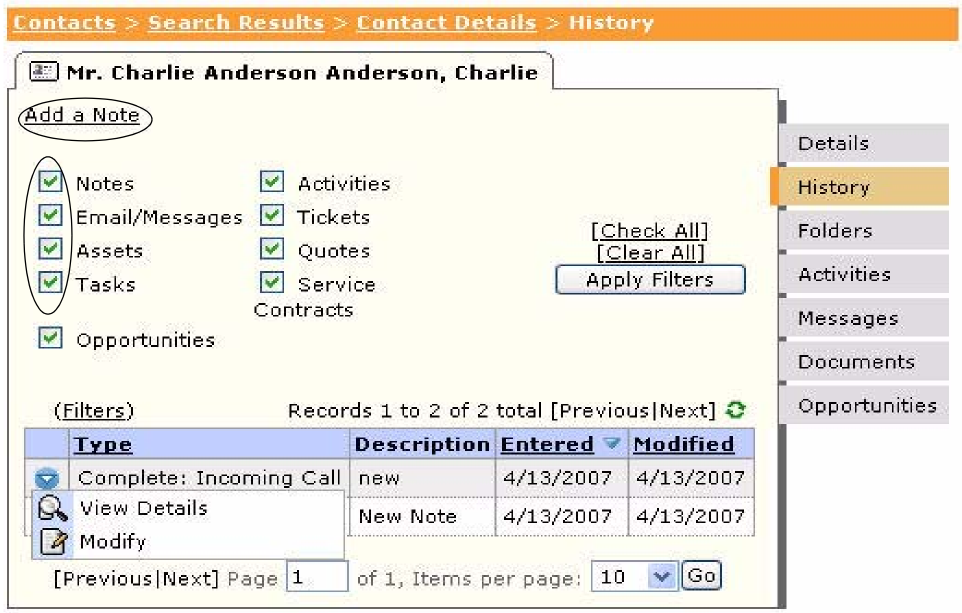


Figure 4.9 Viewing the History Page

Click the action icon to view a context menu, as shown in Figure 4.9. You can select from the options to view details or modify details of each activity.

4.4 Using Contact Folders

You can access the **Folders** page by clicking the **Folders** sub-tab on the **Contact Details** Page, as shown in Figure 4.10.

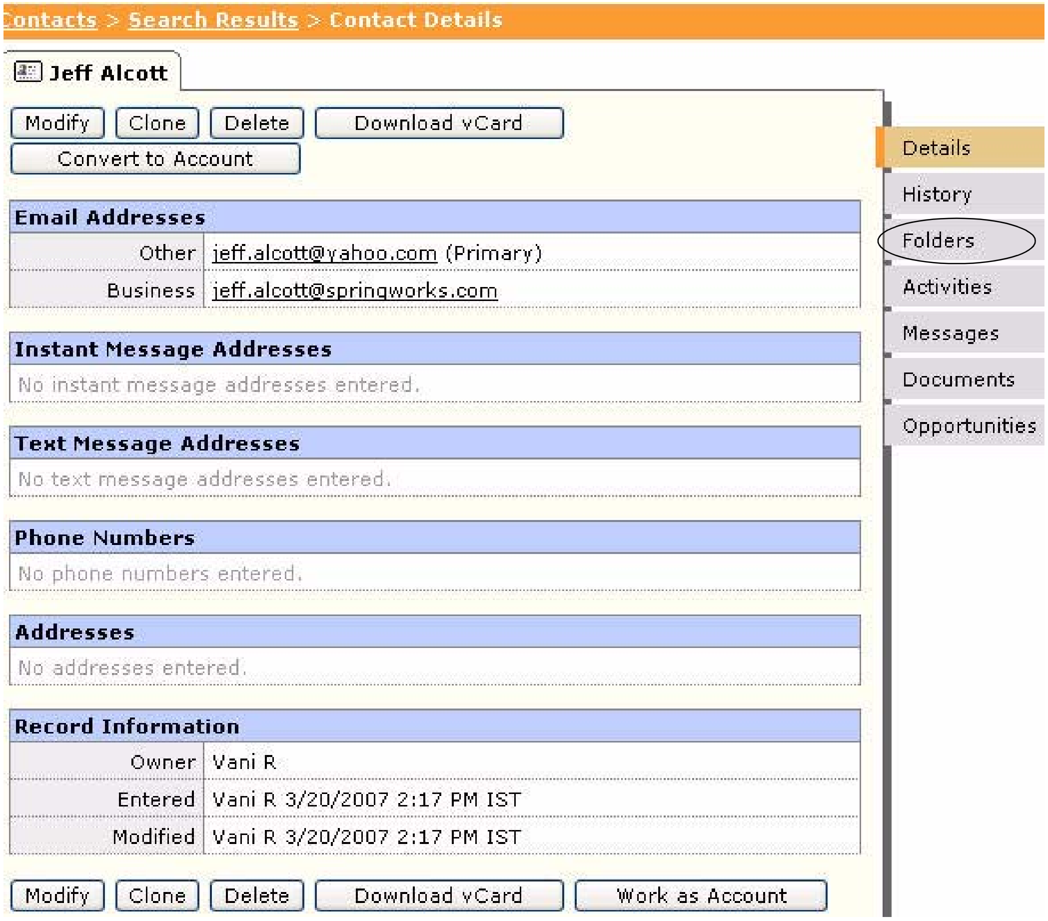


Figure 4.10 Accessing the Folder Page

The **Folders** sub-tab lets you to perform the following tasks:

- Capture and store data that is not available by default on the contact details page.
- Extend the database with new information.

The **Folders** page contains options to select from the available folders, as shown in **Figure 4.11**. After selecting the folder, click **Modify** to enter or modify the information in the folder. For more information on adding new folders, refer to **Section 15.6.1, "Creating Custom Folders and Fields"**.

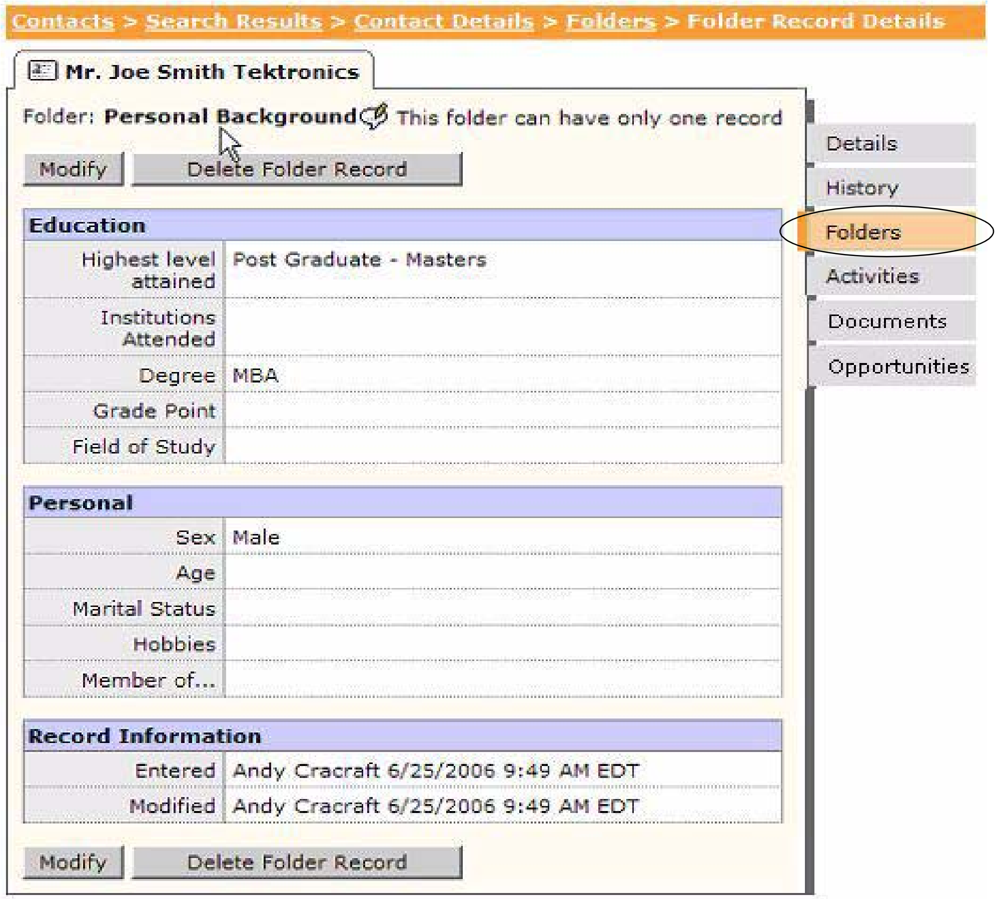


Figure 4.11 Contact Folder

4.5 Recording and Planning Activities

In a sales situation, you constantly interact with prospects through mails, phone calls, meetings, and so on. Each of these interactions is known as an activity. This application enables you to record activities as they occur, and to plan your future course of action. The application records the following activities:

- Incoming Call
- Outgoing Call
- Inhouse Meeting
- Outside Appointment
- Email Servicing
- Fax Servicing

To initiate business, you may be required to act in advance or proactively interact with a prospective business client or a current business customer. In such instances the following interactions can be recorded:

- Proactive Call
- Proactive Meeting
- Email Proactive
- Fax Proactive

Clicking the **Activities** sub-tab displays the **Activities** page, which enables you to log an activity or schedule an activity for the contact, as shown in **Figure 4.12**. This page lists the following activities:

- Pending Activities
- Completed/Canceled Activities

Figure 4.12 Logging and Scheduling Activities

A typical contact activities page is shown in **Figure 4.13**, displaying both pending and completed activities.When you click the action icon, a context menu is displayed.

Figure 4.13 A Typical Contact Activities Page

The following options are available on the context menu:

- View an activity
- Complete an activity

- Modify an activity
- Cancel an activity
- Forward an activity

Assume a contact named "Frank George" attends an incoming business call. The following sections guide you to record this activity and schedule an outgoing call for the same contact:

- **"Log an Activity"**
- **"Schedule an Activity"**

4.5.1 Log an Activity

The following steps enable you to record Frank George's incoming business call:

1. Click the **Log An Activity** link.

   The page to log an activity is displayed, as shown in **Figure 4.14**.

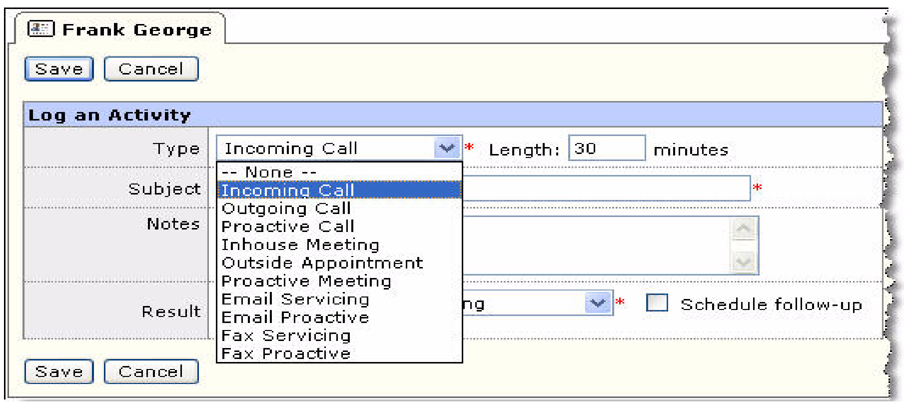


Figure 4.14 Logging an Activity

2. Select "Incoming Call" as the **Type** of activity.
3. Enter "Business Call" as the **Subject,** and "30 minutes" as the **Length (**indicating the time taken for the activity).
4. Enter a brief description of the call in **Notes.**
5. Select "Yes Business progressing" as the **Result,** as shown in **Figure 4.15**.

6. Click **Save**.

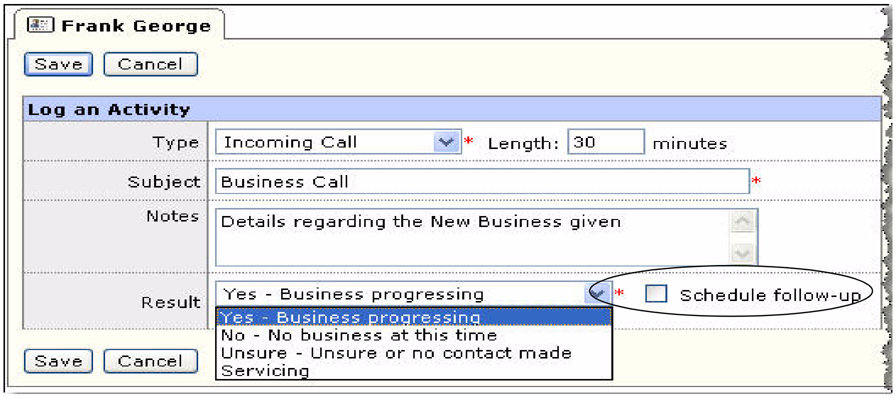


Figure 4.15 Logging an Incoming Call

4.5.2 Schedule an Activity

The following steps enable you to schedule Frank George's planned business call:

1. There are two ways to access the **Schedule an Activity** section:

   a. Select the checkbox **Schedule follow-up activity** in the **Log an Activity** section, as shown in **Figure 4.15**.

   b. Click the **Schedule an Activity** link in the **Activities** page, as shown in **Figure 4.12**.

   The page to schedule an activity is displayed, as shown in **Figure 4.16**.

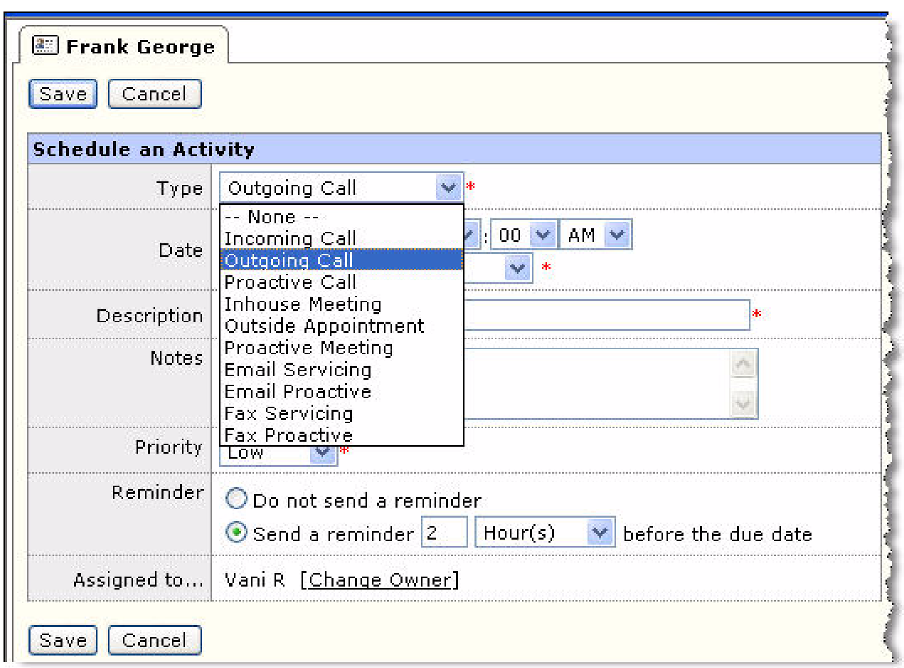


Figure 4.16 Scheduling an Activity

2. Select "Outgoing Call" as the **Type**.

3. Select the **Date** and **Time** at which the call should be made.
4. Enter a brief description, and notes on the agenda for the planned call, in the respective fields.
5. Select "High", "Low" or "Medium" as the **Priority** depending on the importance of this activity.
6. Select the option **Send a reminder**. Specify the time when you wish to receive the reminder.
7. Click **Save**.

4.6 Sending Messages

The **Messages** page contains a chronological record of every communication sent to the contact, whether through a campaign in communications, or an email sent from another part of Centric CRM.

You can access the **Messages** page by clicking the Messages sub-tab on the **Contact Details** page, as shown in **Figure 4.17**.

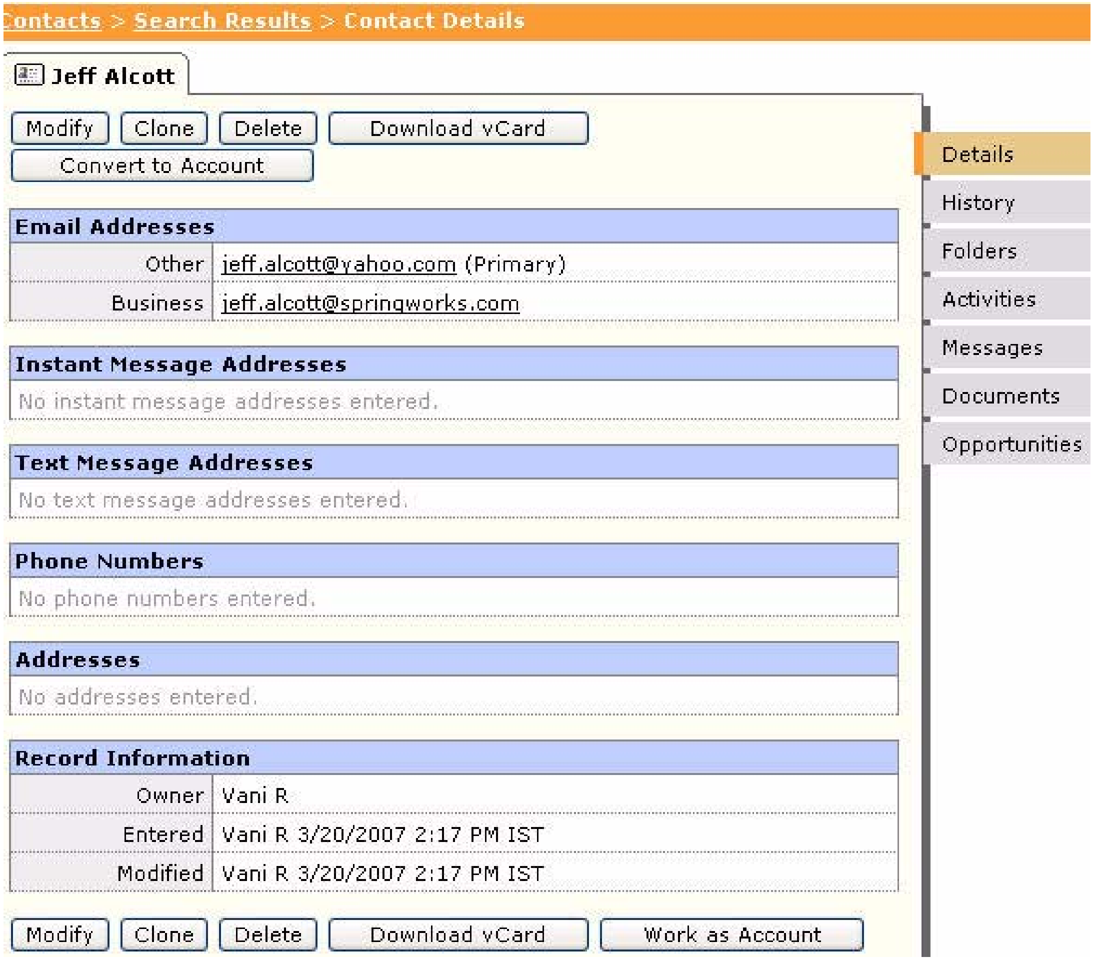


Figure 4.17 Accessing the Messages Page

You can review every message that has been sent to a contact. You can also send a message to a contact by clicking **New Message**. The **New Message** page is displayed, as shown in **Figure 4.18**.

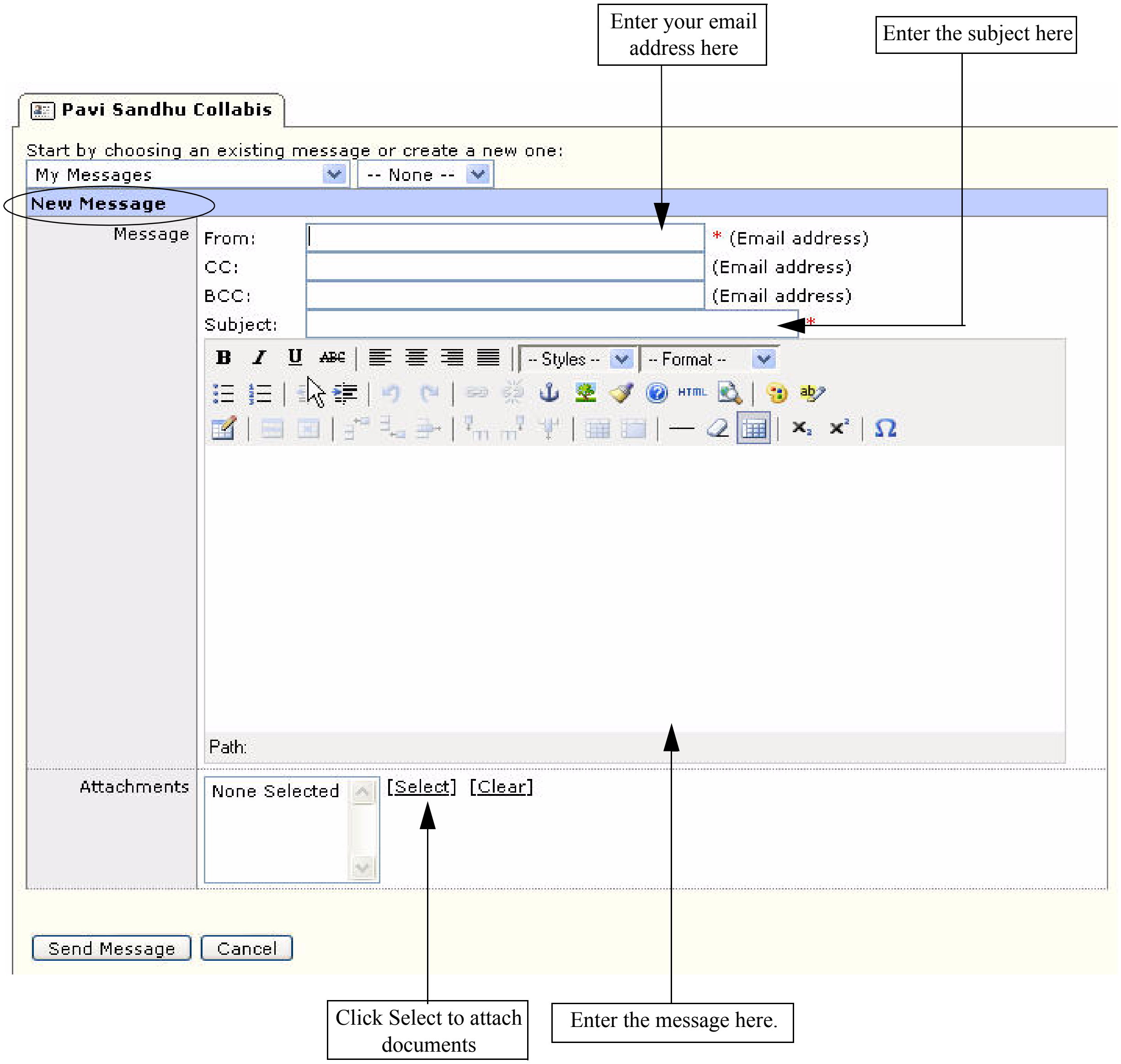


Figure 4.18 New Message Page

Enter your email address, the subject of the email, and the message.

You can attach documents to a new message. Documents can be directly uploaded while writing the email, or selected from the following modules:

- Accounts
- Contacts
- Projects
- Document Store

To attach documents to your messages, follow the steps listed below:

1. Click the **Select** link.

   The **Top Folder** page is displayed, as shown in **Figure 4.19**.

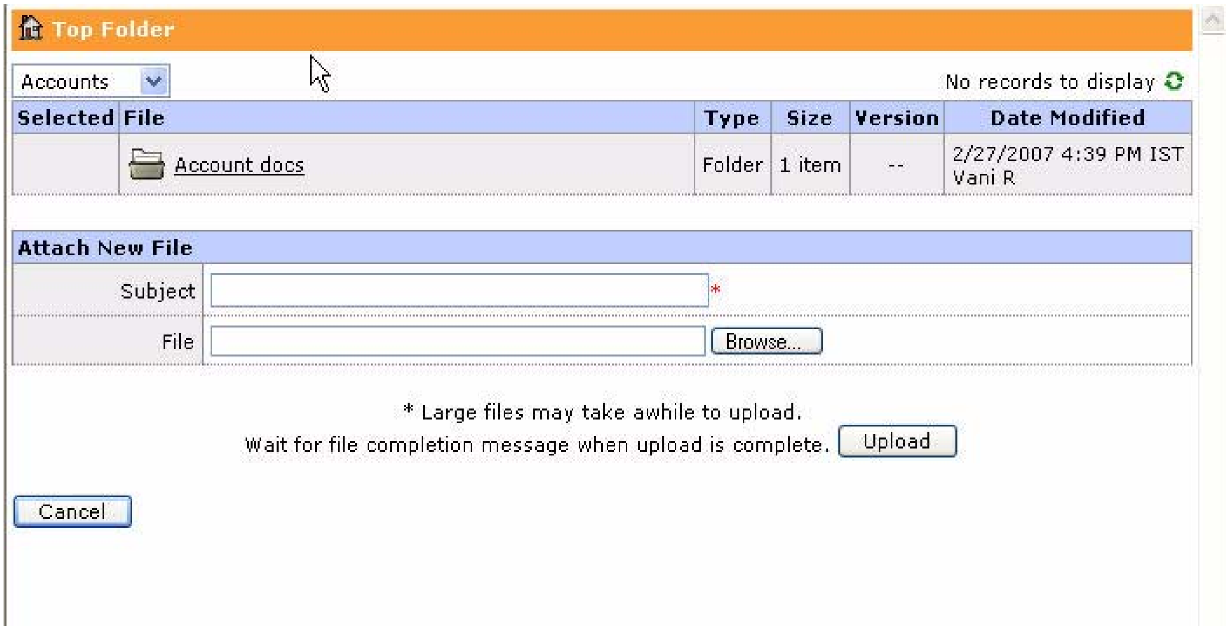


Figure 4.19 Top Folder Page

2. From the drop-down list, select the module that contains the documents to be attached, as shown in **Figure 4.20**.

   Selecting the module displays the folders and documents stored in that particular module.

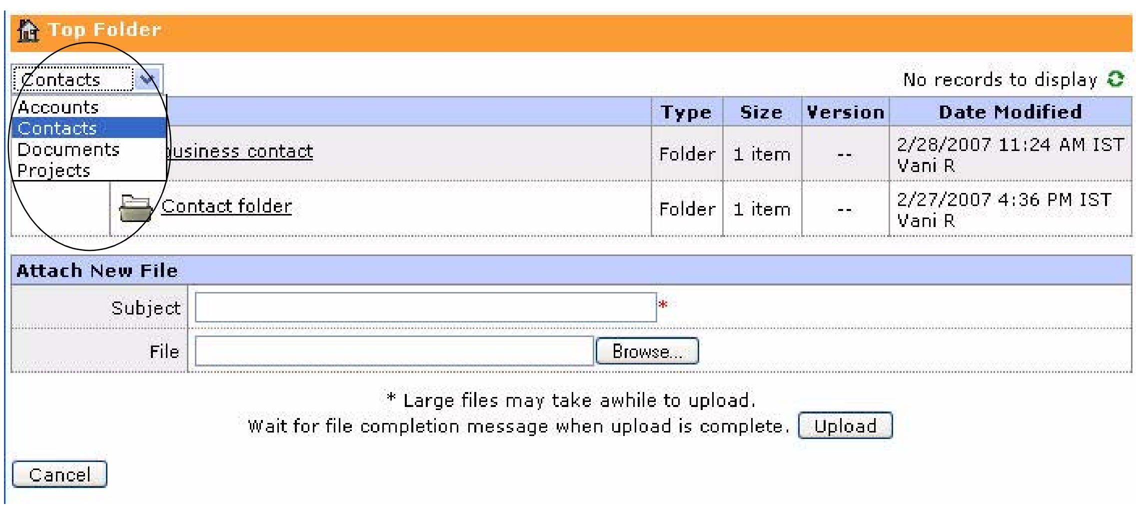


Figure 4.20 Selecting the Module

3. You can also attach documents from the desktop. Click **Browse** to upload a new document, as shown in **Figure 4.21**.

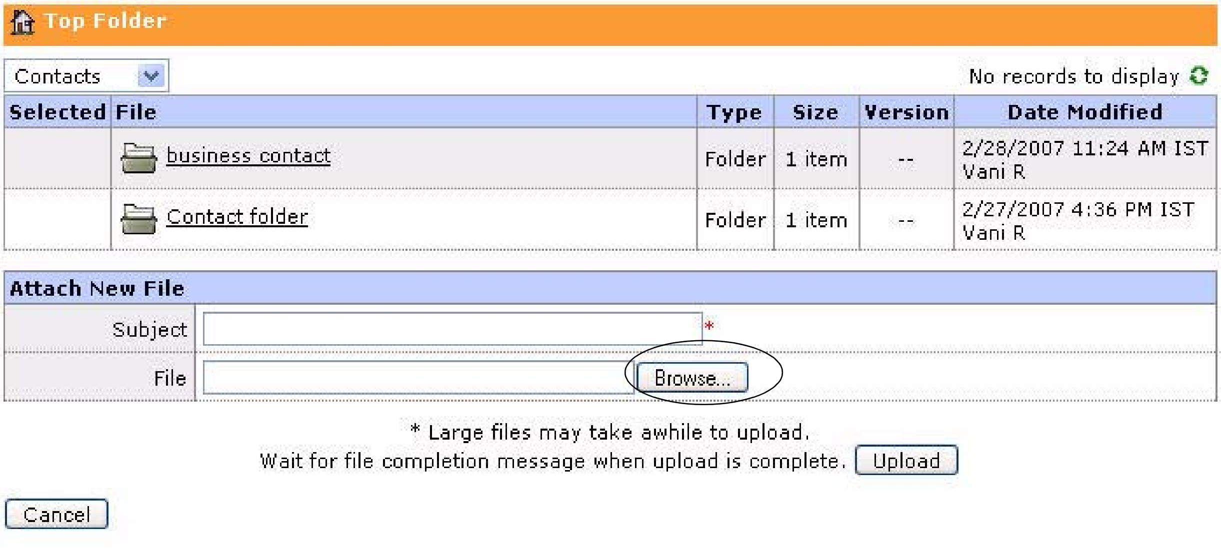


Figure 4.21 Locating a Document to Upload

The **Choose file** window is displayed, as shown in **Figure 4.22**.

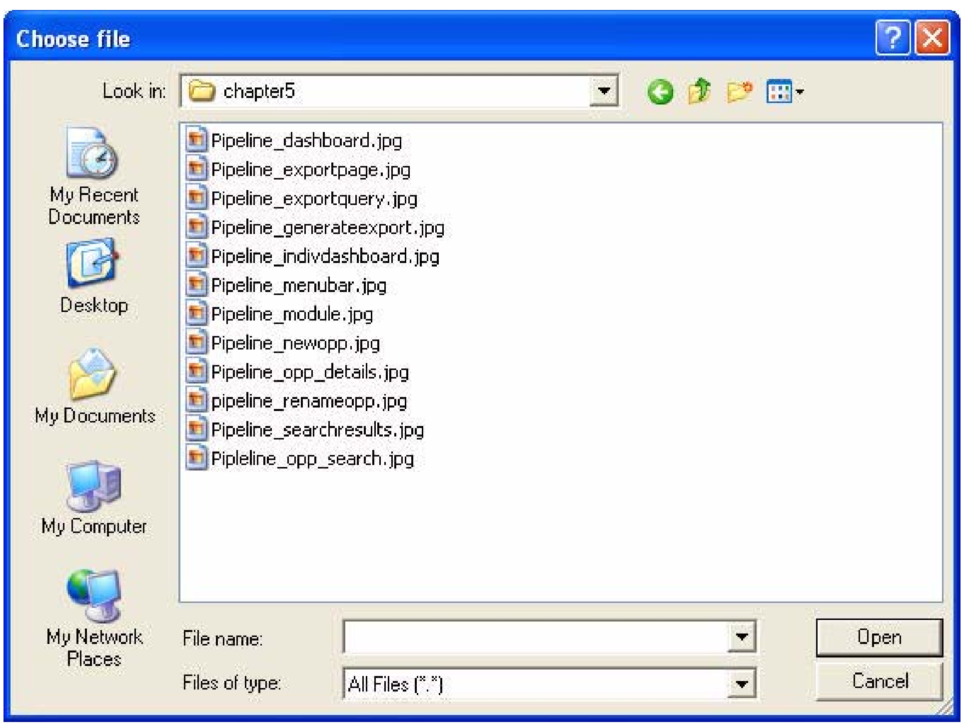


Figure 4.22 Choose File Window

4. Select the file and click **Open.**

   The name and location of the selected file is displayed, as shown in **Figure 4.23**. Enter a subject.

5. Click **Upload** as shown in **Figure 4.23**.

   The uploaded file with the subject "New File" is displayed in the list of selected files, as shown in **Figure 4.24**.

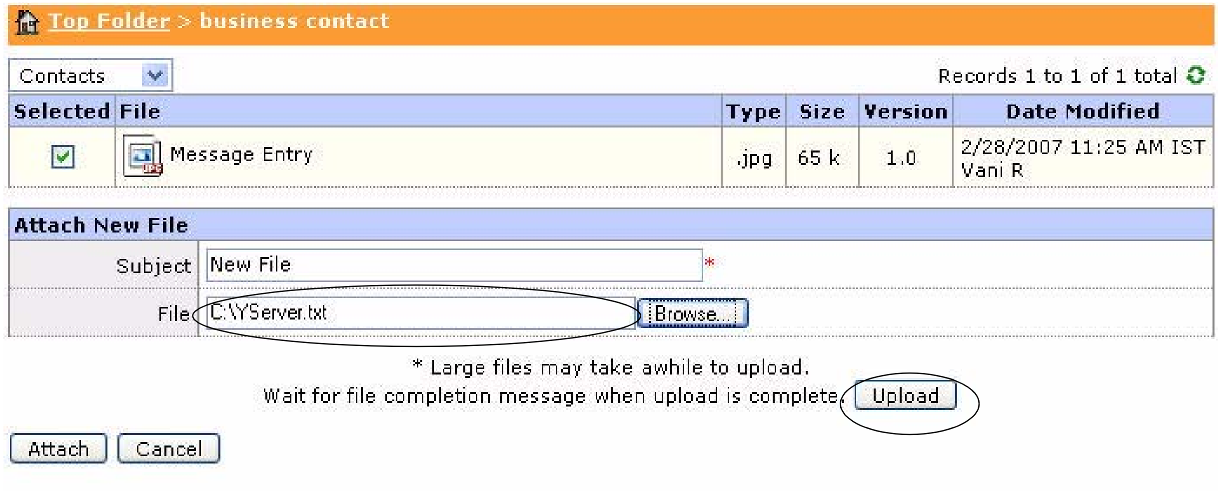


Figure 4.23 Uploading a Selected Document

6. Select the required files to be attached as shown in **Figure 4.24**.

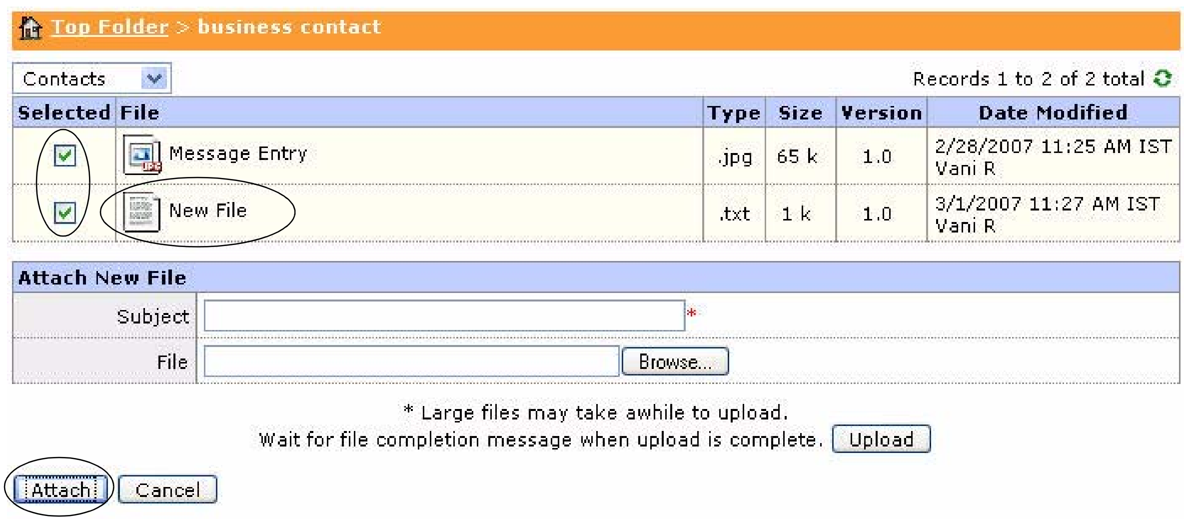


Figure 4.24 Attaching the Selected Documents

7. Click **Attach**.

   The attached documents are displayed in the **New Message** page, as shown in **Figure 4.25**.

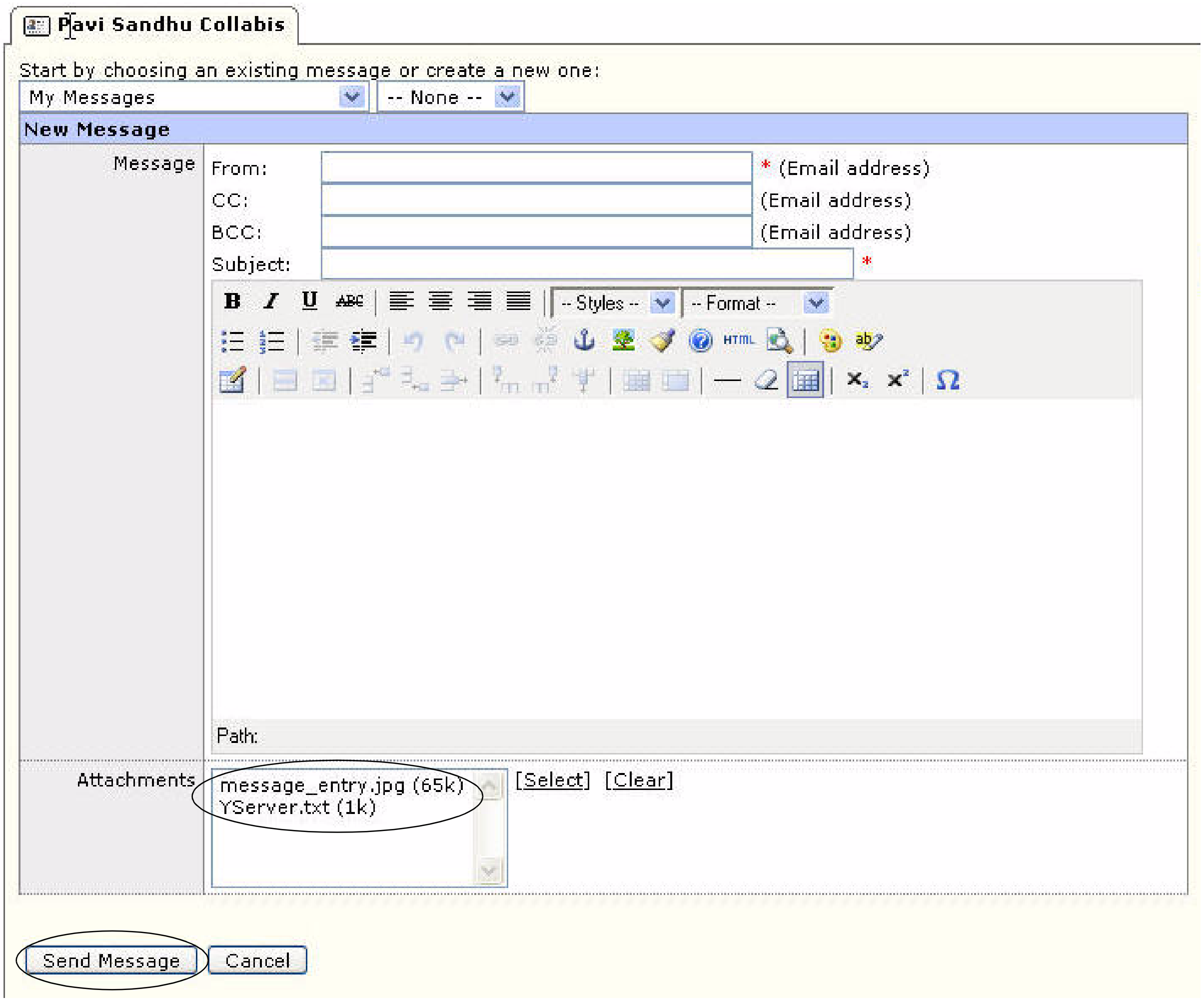


Figure 4.25 New Message Page with the Attachments

8. Click **Send Message.**

4.7 Adding and Accessing Documents

You can access the **Documents** page by clicking the **Documents** sub-tab on the **Contact Details** Page, as shown in Figure 4.26.

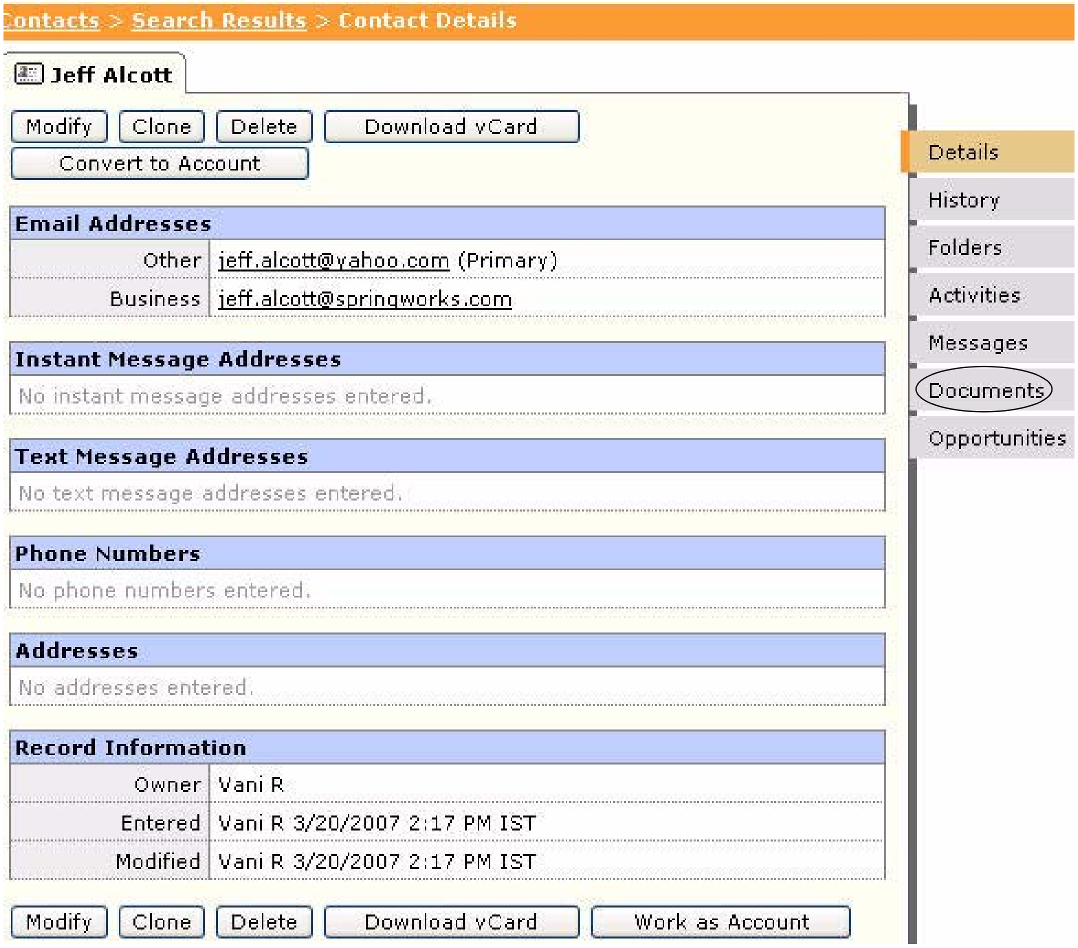


Figure 4.26 Accessing the Documents Page

The **Documents** page of the **Contacts** module displays a detailed list of folders and documents stored against a particular contact, as shown in Figure 4.27. These files and folders are relevant to this contact.

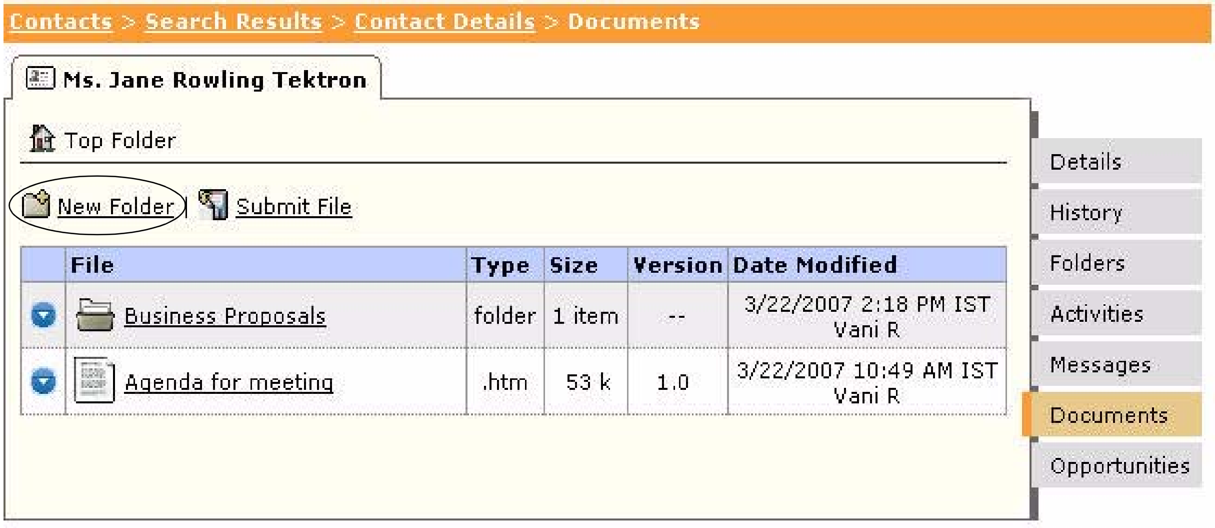


Figure 4.27 Viewing the Documents Page

You can organize your documents in two ways, as listed below:

a. Create a new folder and store documents in this folder. Attach the folder to the contact.

b. Attach documents directly to the contact.

To create a new folder and store documents within this folder, follow the steps listed below:

1. Click **New Folder**, as shown in **Figure 4.27**.

   The **New Folder** page is displayed, as shown in **Figure 4.28**.

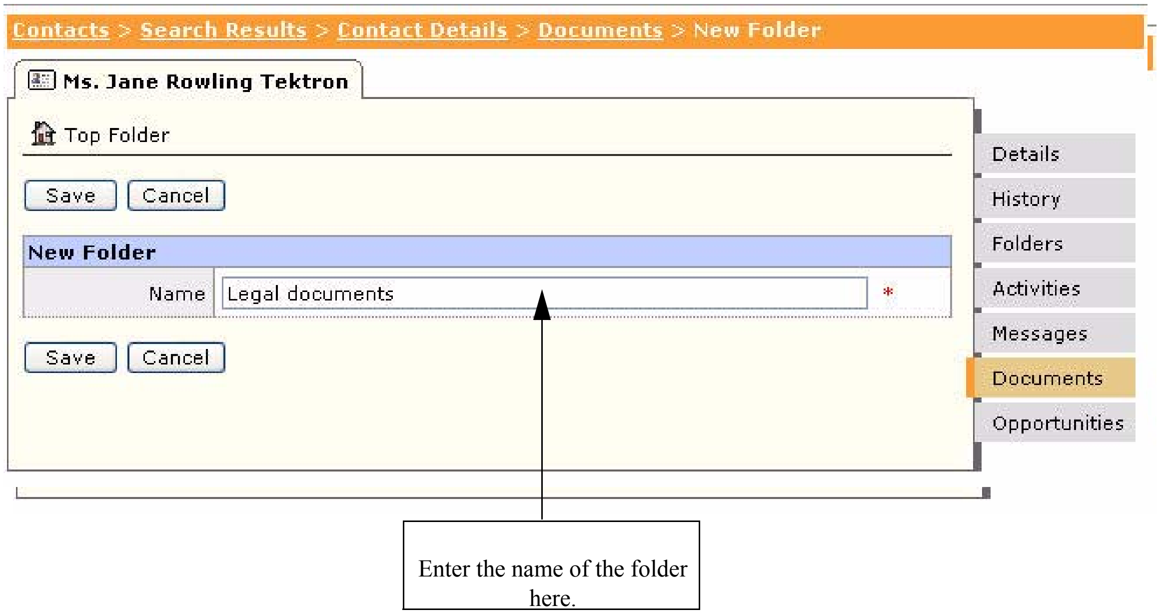


Figure 4.28 Viewing the New Folder Page

2. Enter the **Name** of the folder and click **Save**.

   A new folder by the specified name is displayed on the **Documents** page, as shown in **Figure 4.29**

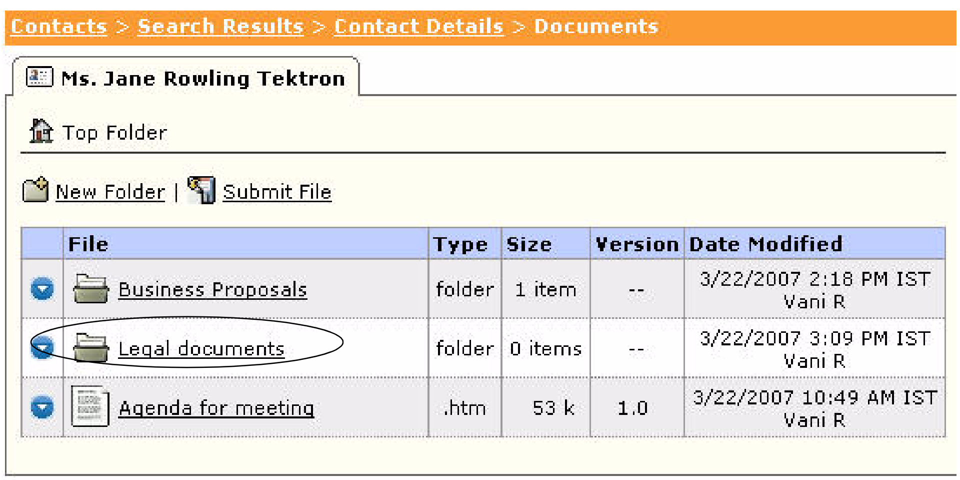


Figure 4.29 Viewing the Created Folder

3. Click the folder name, as shown in **Figure 4.29**.

The **Documents** page of the new folder "Legal Documents" is displayed, as shown in **Figure 4.30**.

Figure 4.30 **Viewing the Documents Page of the Created Folder**

4. Click **Submit File** to add new documents to this folder, as shown in **Figure 4.30**.

   The **Upload Document** page is displayed, as shown in **Figure 4.31**.

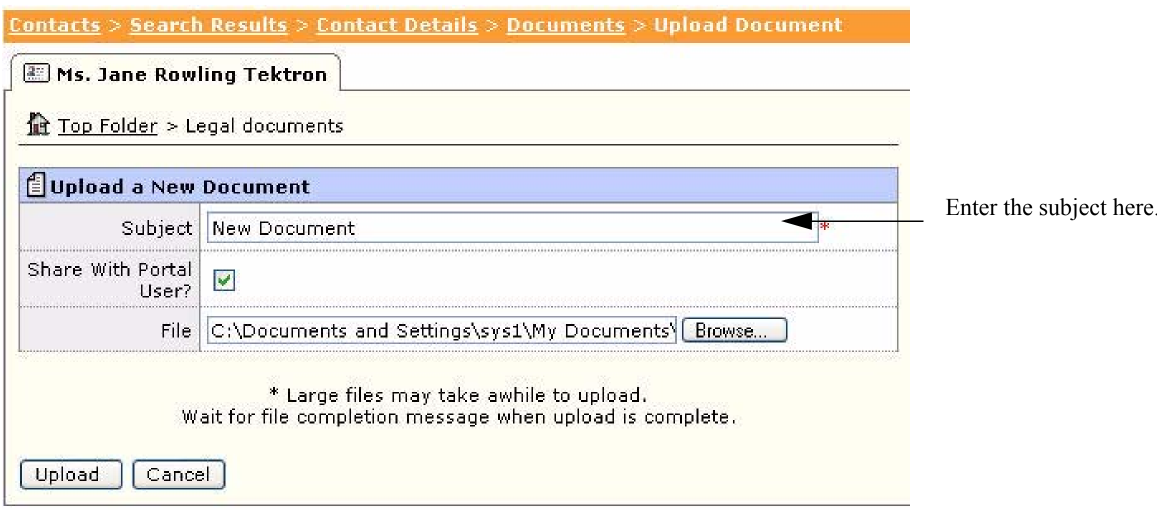


Figure 4.31 **Viewing the Upload Document Page**

5. Enter the **Subject**.
6. Click **Browse**. Select the document to upload and click Open on the Choose file window and click **Upload,** as shown in **Figure 4.31**.

The **Documents** Page with the added document is displayed, as shown in **Figure 4.32**.

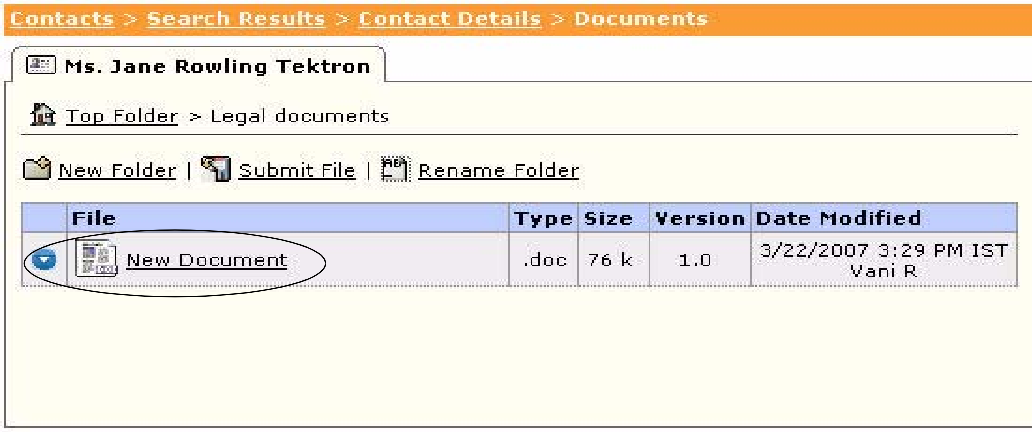
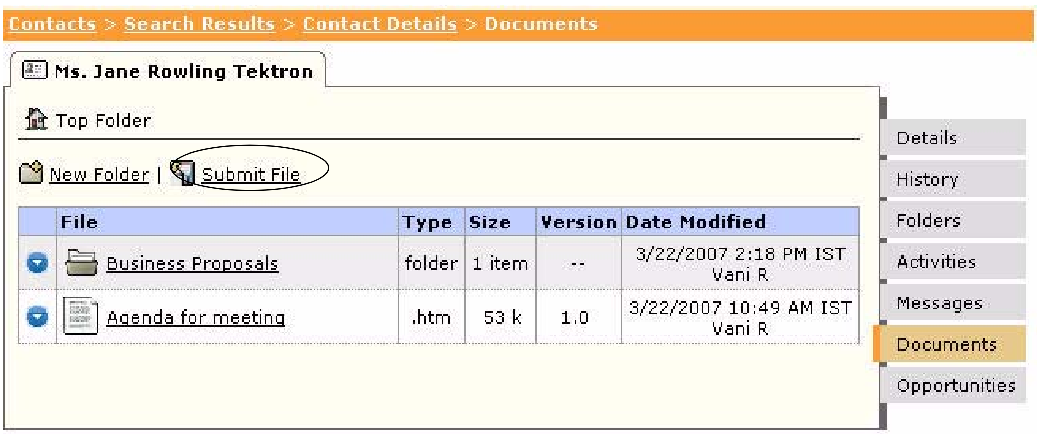


Figure 4.32 **Viewing the Uploaded Document**

To attach documents directly to the contact, follow the steps listed below:

1. Click **Submit File**, as shown in **Figure 4.27**.



The **Upload Document** page is displayed, as shown in **Figure 4.33**.

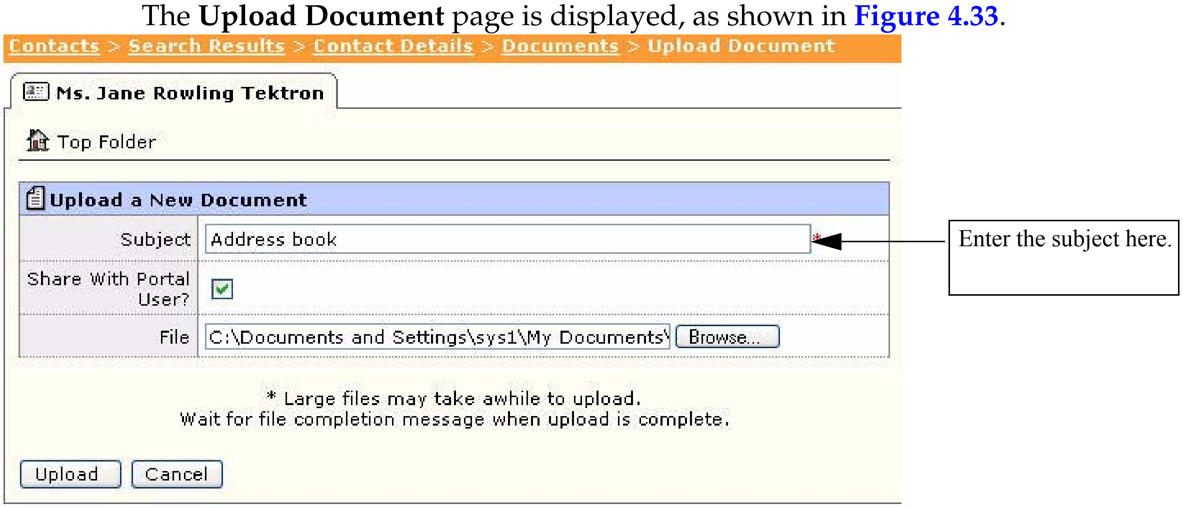


Figure 4.33 **Viewing the Upload Document Page**

2. Enter the **Subject**.
3. Click **Browse**. Select the document to upload, click Open on the Choose file window and click **Upload,** as shown in Figure 4.33.

   The **Documents** page with the added document is displayed, as shown in Figure 4.34.

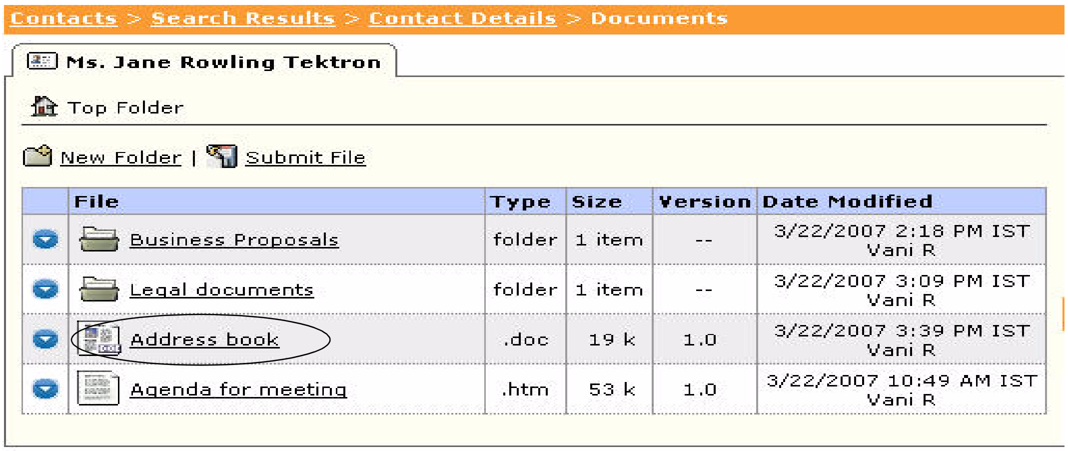


Figure 4.34 Viewing Documents Page With the Uploaded Document

4.8 Viewing Opportunities

You can access the **Opportunities** page by clicking the **Opportunities** sub-tab on the **Contact Details** Page, as shown in

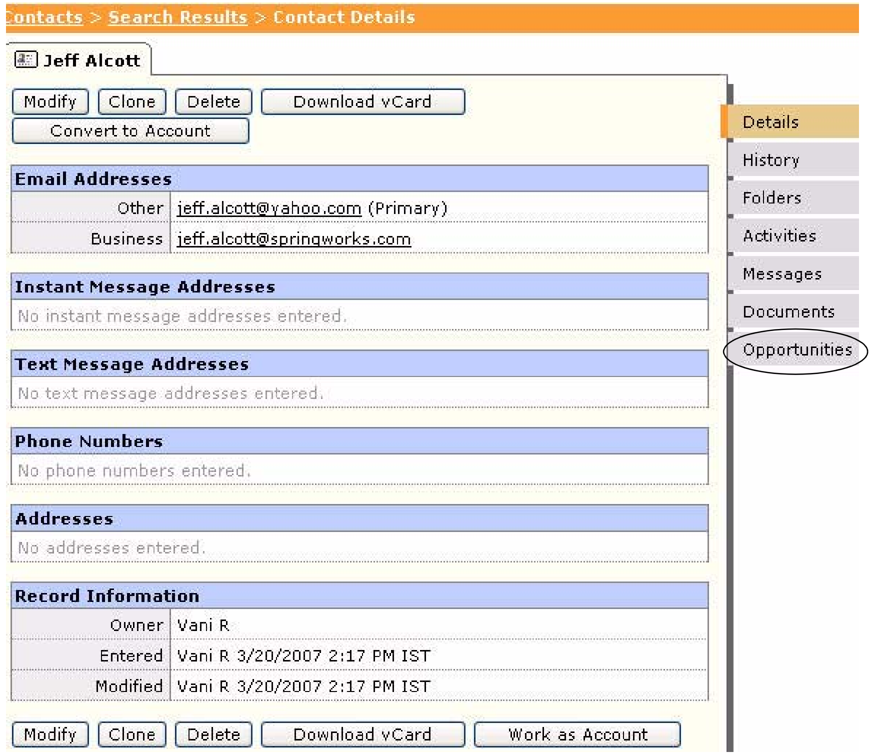


Figure 4.35 Accessing the Opportunities Page

The **Opportunities** sub- tab lists and describes opportunities relating directly to a specific contact.

The different types of opportunities are as follows:

- All Open Opportunities
- All Closed Opportunities
- My Open Opportunities

You can view details of an opportunity by clicking the **Opportunity Name**. You can also rename or delete an opportunity by clicking on the relevant options.

For more information on opportunities, refer to **Section 5.3, "Adding an Opportunity"**.

4.9 Importing Contacts

This feature, similar to the **Lead** module's **Import** feature, enables you to import a list of contacts from another application such as a .CSV file. The procedure for importing contacts is similar to the procedure for importing leads. For more information on importing leads, refer to **Section 3.5, "Importing Leads"**.

4.10 Exporting Contacts

This feature enables you to export contact details. The procedure to export contacts is similar to the procedure for exporting leads. For more information on exporting leads, refer to **Section 3.6, “Exporting Leads”**.

CHAPTER
5

Understanding the Pipeline

This chapter provides information on the **Pipeline** module of Centric CRM. This module enables you to document, analyze, and manage revenue opportunities with your contacts and accounts.

This chapter contains the following sections:

5.1 How Does This Module Help You?

This module helps you track revenue opportunities that your organization is currently working on. It enables you to gauge revenue potential, and manage opportunities with your contacts and accounts.

Before understanding the features and operation of this module, you need to know what an opportunity is, and how to add a new opportunity into the system.

An opportunity is defined as the possibility of doing business with a person or company that you know. Complex opportunities may be made up of several components. For example, consider the sale of a product such as machinery. You need to provide training to the customer on how to use the product, and also provide support after the sale. Hence the components in this above example are:

- Machinery sale opportunity
- Training Contract
- Support Contract

Each of these components may have its own revenue amount. Opportunities are recorded with the following attributes associated with them:

- A customer
- An estimated amount of revenue
- A probability of closure expressed as a percentage

- An estimate term for the completion of the opportunity

5.2 Overview of the Pipeline Module

Click the **Pipeline** tab to access the pipeline module. The pipeline menu bar and the **Dashboard** page is displayed, as shown in **Figure 5.1**. This menu bar enables you to navigate through the pipeline module.

Figure 5.1 **Pipeline Menu Bar**

The **Dashboard** page has a dashboard area on the left, and a listing of opportunities on the right, one per line, as shown in **Figure 5.2**.

Figure 5.2 **Dashboard Home Page**

5.3 Adding an Opportunity

To add an opportunity, follow the steps listed below:

1. Click **Add** on the menu bar.

   A blank **Add Opportunity** page is displayed, as shown in **Figure 5.3**.

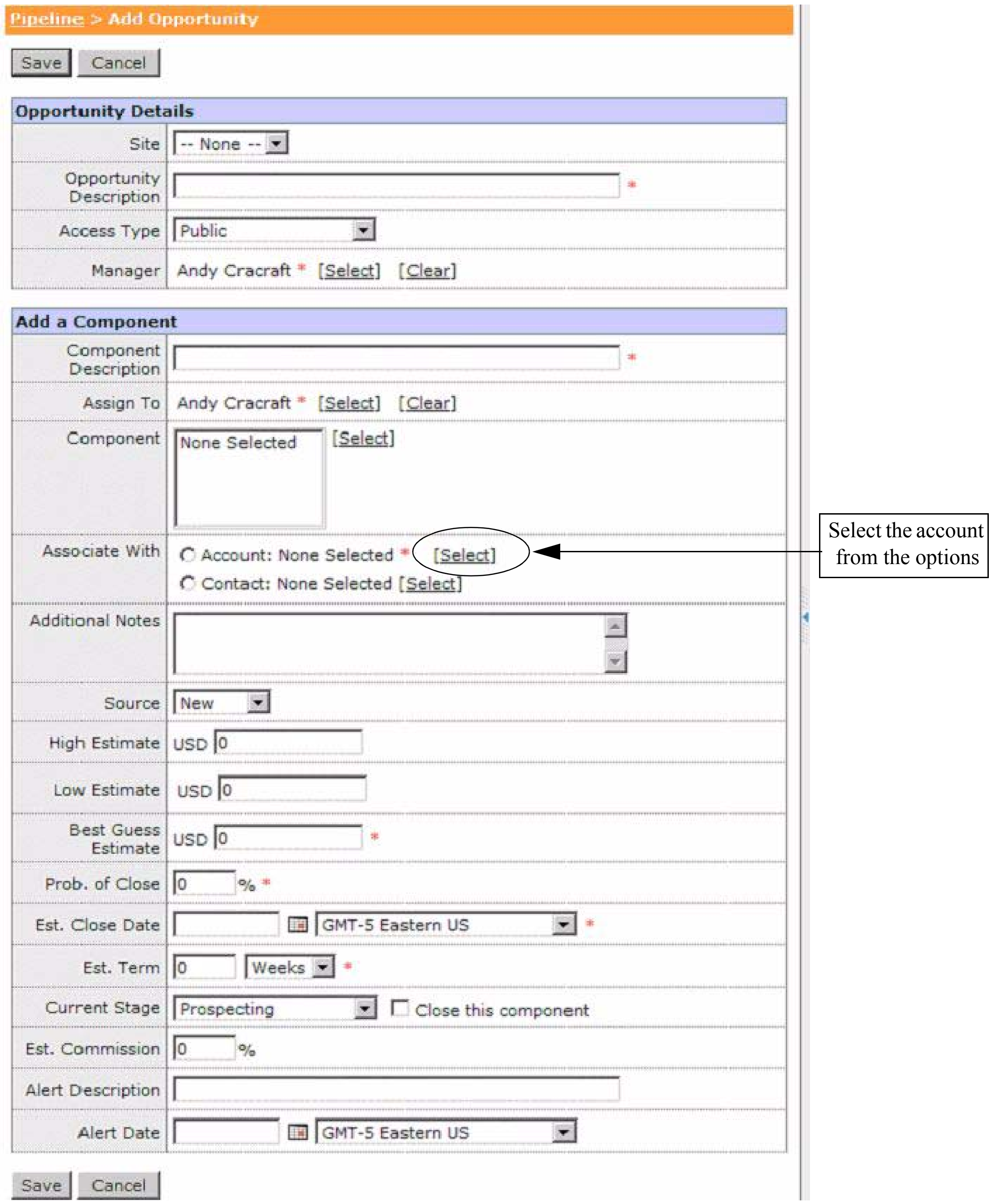


Figure 5.3 Add Opportunity Page

2. Enter the relevant details. Fields with a red asterisk are mandatory. The **Add Opportunity** page contains the following important fields:
   - **Opportunity Description** - A brief description of the opportunity.
   - **Access Type** - This field enables you to specify if the opportunity can be viewed by all users, or a particular group of users. The available options in the drop-down list are: Public and Controlled Hierarchy.

- **Manager** - This option enables you to select the concerned manager for this opportunity.
- **Component Description** - A brief description of the component.
- **Assign To** - This field enables you to assign the responsibility of this opportunity to a subordinate.
- **Component** - Clicking **Select** displays a pop-up window, where you can select a component type from the following options:
    - Annuity
    - Consultation
    - Development
    - Maintenance
    - Product Sales
    - Services
- **Associate With** - This field enables you to associate the opportunity with an account or a contact.
- **Additional Notes**, **Source**, and estimated amounts - high, low and best guess
- **Probability of Close**

  Some companies have established a process for determining the probability value. For example, after they have delivered a presentation, they automatically assign a probability of 50%. Other companies are less formal, and the probabilities are assigned subjectively by the sales person, based solely on instinct. In either case, the probability should change from time to time as you work on the opportunity. This field is important, because it affects the dashboard graph in the **Risk Adjusted** mode.
- An estimated term and an estimated close date.
- **Current Stage** - This field is a drop-down list that describes the stage of sale of an opportunity.
- **Commission**, This field describes an estimated percentage of final sale that is assigned as commission.

  This value can be taken into account on the dashboard by selecting one of the commission-adjusted revenue items in the drop-down list.
- **Alert**. This field enables you to set alerts to call the customer.

  You can enter an alert description and an alert date in the fields provided. The alert will appear both in your Centric CRM home page and your internet email.

3. Click **Save** to save the opportunity.

   The **Opportunity Details** page is displayed, as shown in **Figure 5.4**. This page provides options to rename or delete the opportunity.

Figure 5.4 Viewing the Created Opportunity

5.4 Viewing the Dashboard

My Dashboard section consists of a graph displaying the following details:

- The value of the opportunities assigned to you and your subordinates.
- A list of your opportunities.

The components of the graph are explained below:

- The blue line on the graph represents the total value of the opportunities for you and your subordinates.
- The red line represents the value of the opportunities of your subordinates.
- The value of your own opportunities is the difference between the two previous values at any point on the graph.

You can select any of the following options from the drop-down list just below the graph to view the corresponding graph, as shown in **Figure 5.5** (part 1 - My Dashboard):

- **Gross Monthly Revenue**
- **Risk Adjusted Monthly Revenue**
- **Commission Gross Monthly Revenue**
- **Commission Risk Adjusted Monthly Revenue**

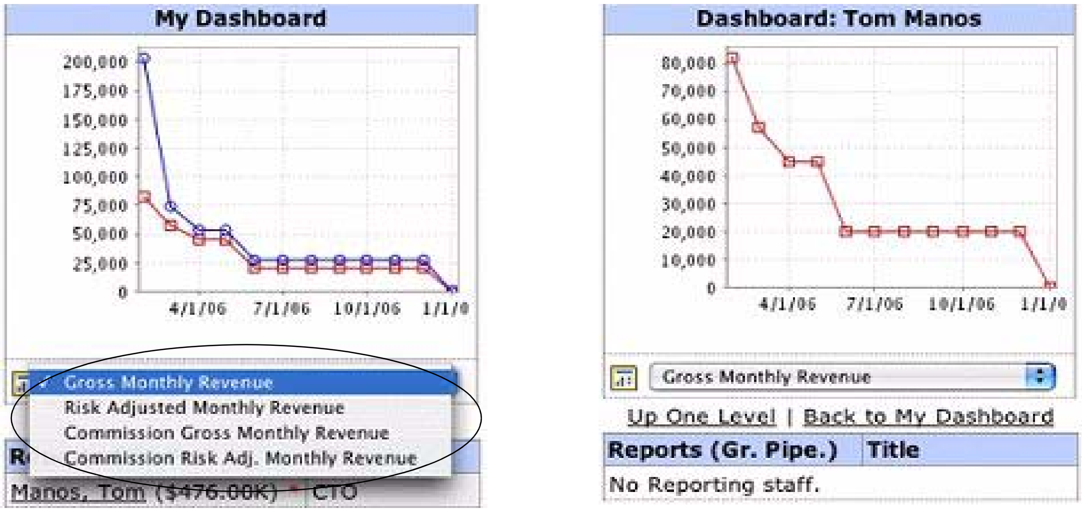


Figure 5.5 **1. My Dashboard** **2. Individual Dashboard**

A table below the graph contains a list of user links for staff members who report to you. Click one of the links to view a graph for that particular employee. The selected employee's dashboard displays a graph with a red line, as shown in **Figure 5.5** (part 2 - Individual Dashboard).

The **Up One Level** link allows you to go up one level and the link **Back to My Dashboard** takes you back to your dashboard. These links allow you to work your way up and down the operational chain.

The opportunity listing is displayed to the right of your dashboard. You can also view the opportunities belonging to your subordinates, by clicking the concerned user's link in the table below your dashboard graph.

Opportunities are displayed one per line, with a short description and the gross value, in thousands of dollars. You can select any opportunity to view its details, as shown in **Figure 5.6**.

Figure 5.6 **Opportunity Details**

The opportunity, as shown in **Figure 5.6** has two components. When you click the action icon, a context menu is displayed. The following tasks are available on this menu:

- **View Details**
- **View Component Log**
- **Modify**
- **Delete**

The other available sub-tabs are as follows:

- **Activities** - lists the activities associated with the opportunity, and their status, whether they are pending or completed.
- **Folders** - displays the folders for the opportunity. For more information on folders, refer to **Section 15.6.1, "Creating Custom Folders and Fields"**.
- **Documents** - This is a cross-link that takes you to the **Documents** module, displaying the documents associated with this opportunity. For more information on documents, refer to **Chapter 12, "Managing Documents"**.
- **Quotes** - Clicking this sub-tab takes you to the **Quotes** module displaying the available quotes for this opportunity. For more information on Quotes, refer to **Chapter 8, "Understanding Quotes"**.
- **History** - lists the opportunities considered in the recent past.

5.5 Searching for an Opportunity

The **Search** link located on the menu bar enables you to find opportunities that match certain specific criteria. Clicking **Search** displays the **Search Opportunities Page**, as shown in **Figure 5.7**, in which you set the search criteria.

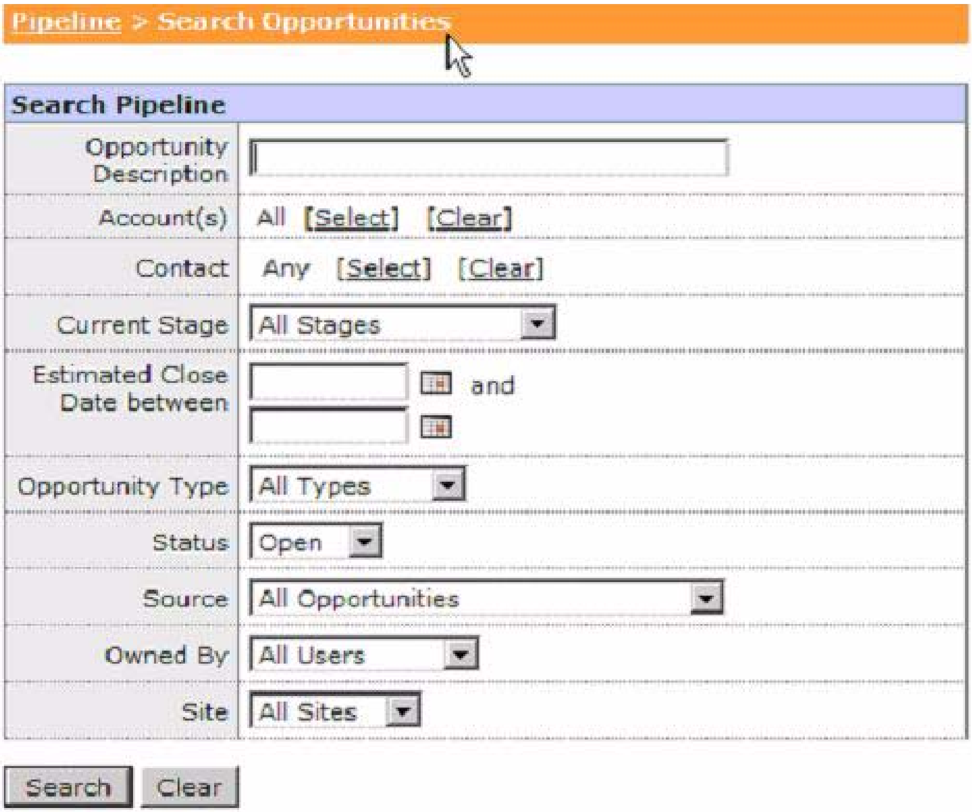


Figure 5.7 Opportunity Search Page

Clicking **Search** displays the **Search Results** page, as shown in **Figure 5.8**, listing the opportunities that match the search criteria, listing the opportunities that match the search criteria.

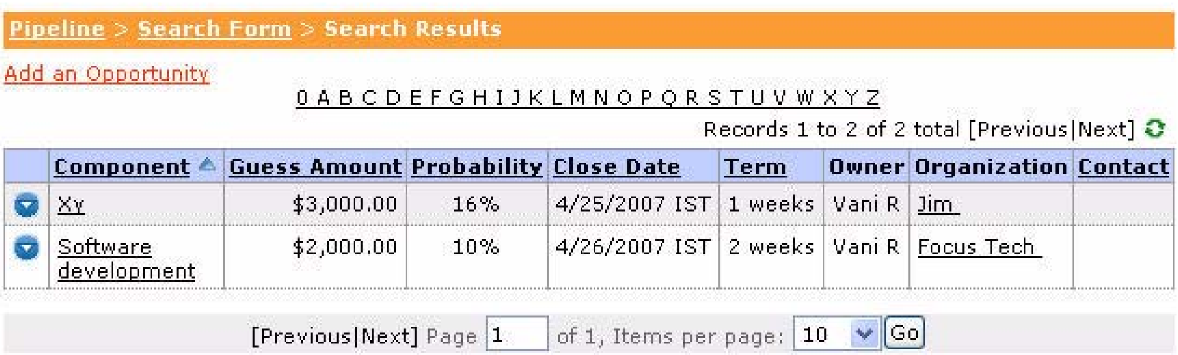


Figure 5.8 Search Results Page

5.6 Exporting an Opportunity

This feature enables you to export opportunities. Click **Export** on the menu bar, to view a list of files that have been exported in the past, as shown in Figure 5.9.

Figure 5.9 Exported Data List

The list also displays the following details:

- Size of the exported data
- Date of creation of data
- Person who created the data

To export new data, follow the steps listed below:

1. Click the **Generate new export** link, as shown in Figure 5.9.

   The New Export page is displayed, as shown in Figure 5.10.

Figure 5.10 Export Page

2. Specify the type and criteria, enter a subject, select the fields to be included, and specify the field for sorting. Click Generate to generate the new export.

The exported files listed on the **Export Data** page, as shown in **Figure 5.11**. The data can be viewed or downloaded as a .CSV file.

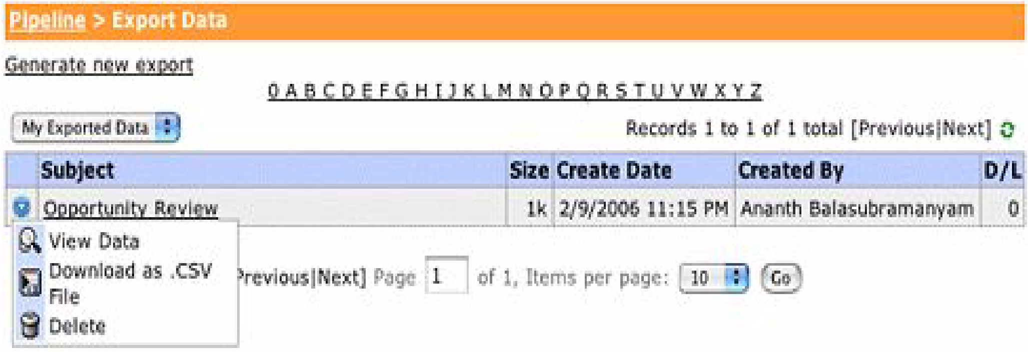


Figure 5.11 Viewing the New Export File

CHAPTER

6

Managing Accounts

This chapter provides information on the **Accounts** module of Centric CRM. This module enables you to view and store information about customers.

This chapter contains the following sections:

6.1 How Does This Module Help You?

In Centric CRM, customers are referred to as accounts. The **Accounts** module enables you to manage information about your accounts.

This module provides answers to the following queries:

- What products or services might a given customer purchase from you?
- What products or services has a given customer purchased from you?

- How and when has the customer been contacted, either by phone or more formally?
- What is our commitment to the customer, in the form of contracts and/or Service Level Agreements?

This module also provides a publicly-accessible interface which the customer can use to view information, enter trouble tickets or request for information.

This module provides information, context, and process, so that you can efficiently track customer transactions, create new sales opportunities, and serve customers.

You can access the **Accounts** module by selecting the **Accounts** tab, as shown in **Figure 6.1**.

Figure 6.1 Accounts Menu Bar

6.2 Searching for an Account

When you click the Accounts tab, the **Search Accounts Page** is displayed, as shown in **Figure 6.2**.

You can search for contacts by specifying the search criteria. The more information you enter in the **Search Accounts** page, the more refined your search becomes.

You can search for accounts by entering one or more of the details as specified below:

- **Account Number**
- **Type**
- **Account Segment**
- **Source**
- **Status**
- **Stage**
- **Postal Code**
- **City**
- **State/Province**
- **Asset Serial Number**

You can search for the contacts associated with an account directly by checking the **Include contacts in search results** checkbox.

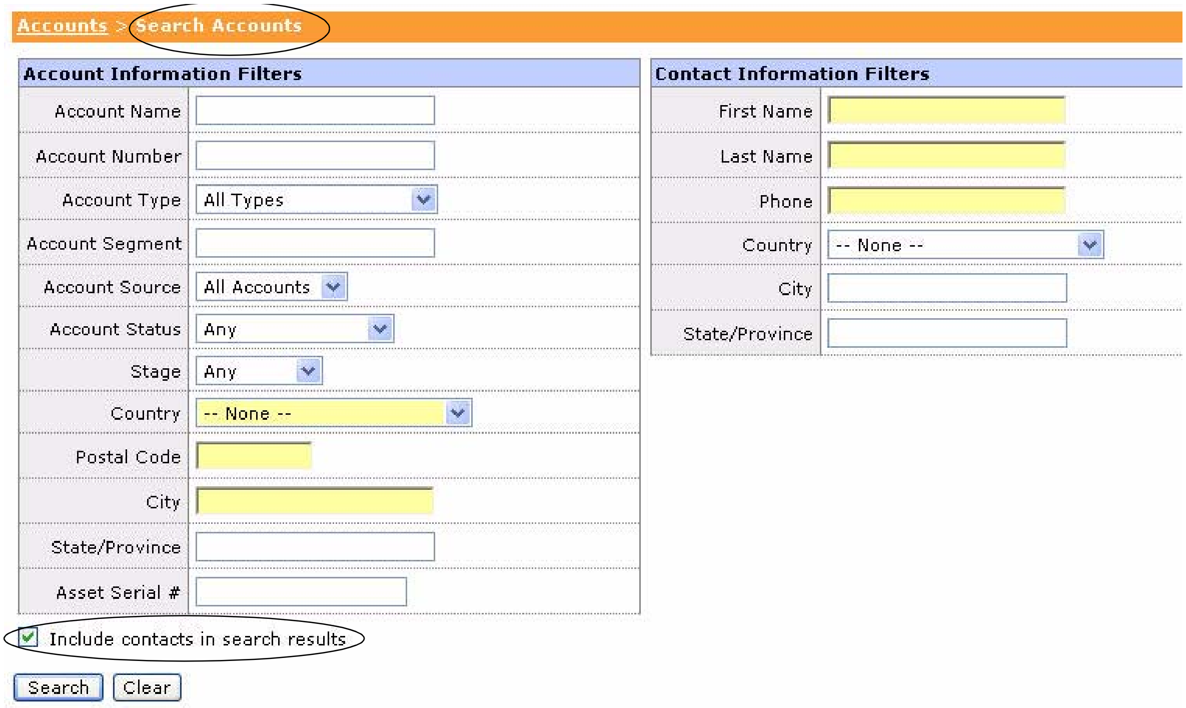


Figure 6.2 Search Accounts Page

You can specify the number of records that you want displayed per page. For example, the number of records displayed per page is set to six in **Figure 6.3**.

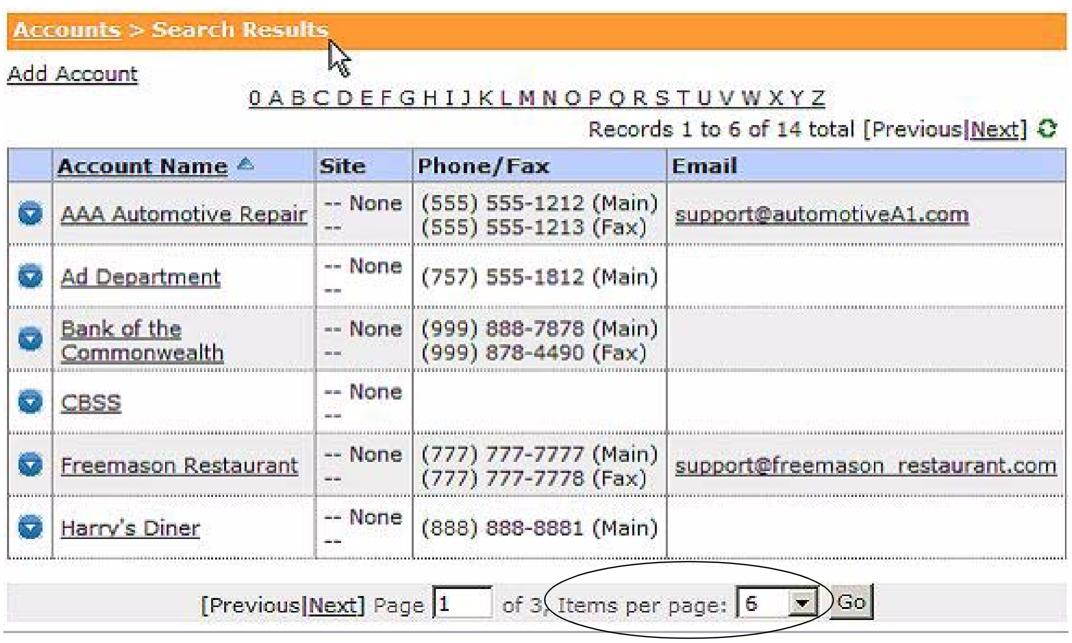


Figure 6.3 Search Results Page

To view all accounts in the system, leave all the fields blank and click **Search**.

Caution: In applications with a large account database, using blank fields to search for accounts may be time-consuming.

6.3 Viewing Account Details

Clicking an account name in the **Search Results** page displays the **Account Details** page, as shown in Figure 6.4.

Figure 6.4 Account Details Page

You can view the following information:

- **Primary Information** - account ownership and other basic information, including any alerts that might be set for the customer.
- **Phone Numbers -** contact numbers of the account
- **Addresses** - the mailing addresses for this account
- **Email Addresses** - the email addresses associated with this account
- **Additional Details** - contains any free form notes entered for this account
- **Record Information** contains the following information:

- When was the account created?
- By whom was the account created?
- When was the account last modified and by whom?

Note: An account can have any number of mailing addresses, email addresses, and phone numbers as necessary. Also, all the phone numbers and addresses apply to the account in general, not necessarily to a particular contact for an account.

Since all accounts are public in Centric CRM, all users having access to an account can view and modify it. Hence, the account owner may not be the person who last modified the account.

6.3.1 Modifying an Account

Click **Modify** on the **Account Details** page to modify the account's details. The **Modify Account** page is displayed, as shown in Figure 6.5

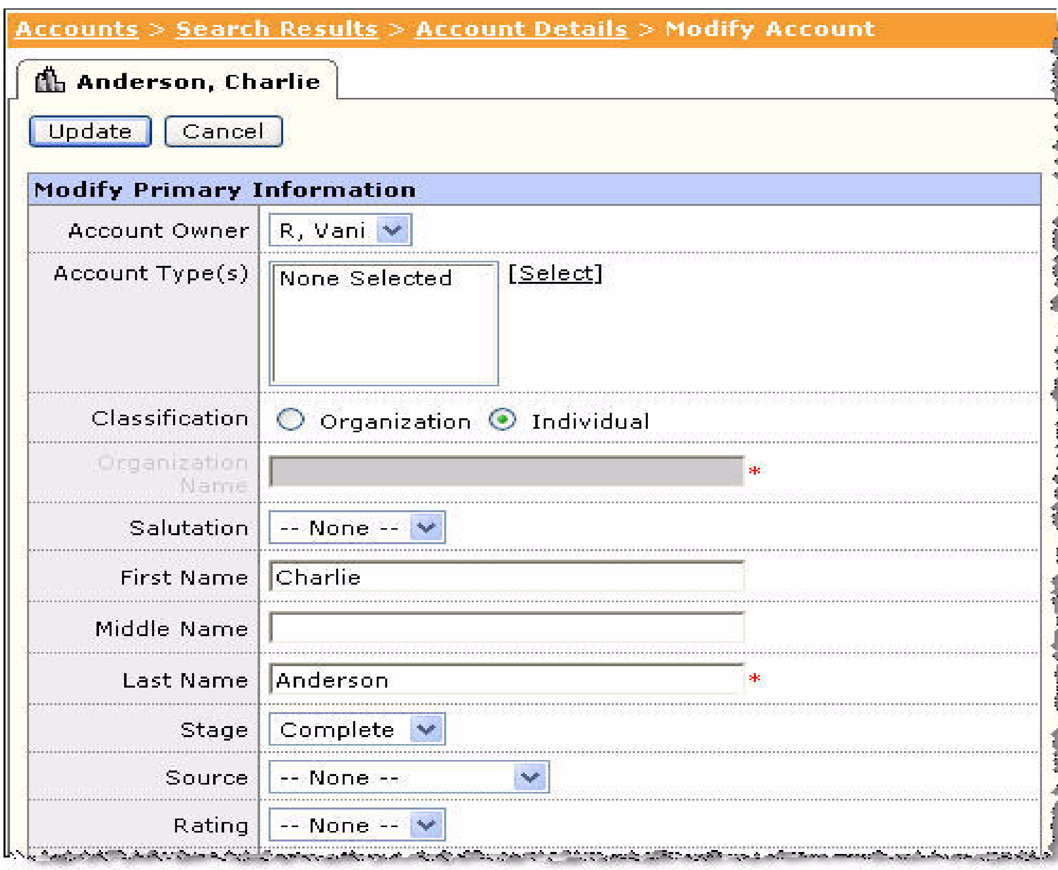


Figure 6.5 Modify Account Page

Click **Update** to commit the changes or **Cancel** to abandon them.

6.3.2 Deleting an Account

Click **Delete Account** on the **Account Details** page, to delete an account. A pop-up window is displayed to confirm the deletion of the account, as shown in **Figure 6.6**.

Figure 6.6 Confirm Delete Pop-Up Window

6.3.3 Adding an Account

To add an account, click the **Add** link on the menu bar or click **Add Account** on the **Search Results** page. The **Add Account** page is displayed, as shown in **Figure 6.7**.

.

Note: The **Add** page contains more details, and a truncated form of the page is shown in **Figure 6.7**.

An account can represent an organization, or an individual. The type of account you are creating is the first field you need to enter. If the account type is an organization, then the **Organization Name** is a mandatory field. If the account type is an individual, then the **Last Name** is a mandatory field. However, you can enter all information that you possess about this account to enable you to easily find the account in searches you perform later.

You can enter the following details:

- Contact information - Details such as phone numbers, email addresses, IM addresses, postal addresses.
- **Account's website**
- **Revenue details**
- **Year Started**
- **DUNS Number and DUNS Type**
- **SIC Description**

- **Contract details**
- **Additional Details**

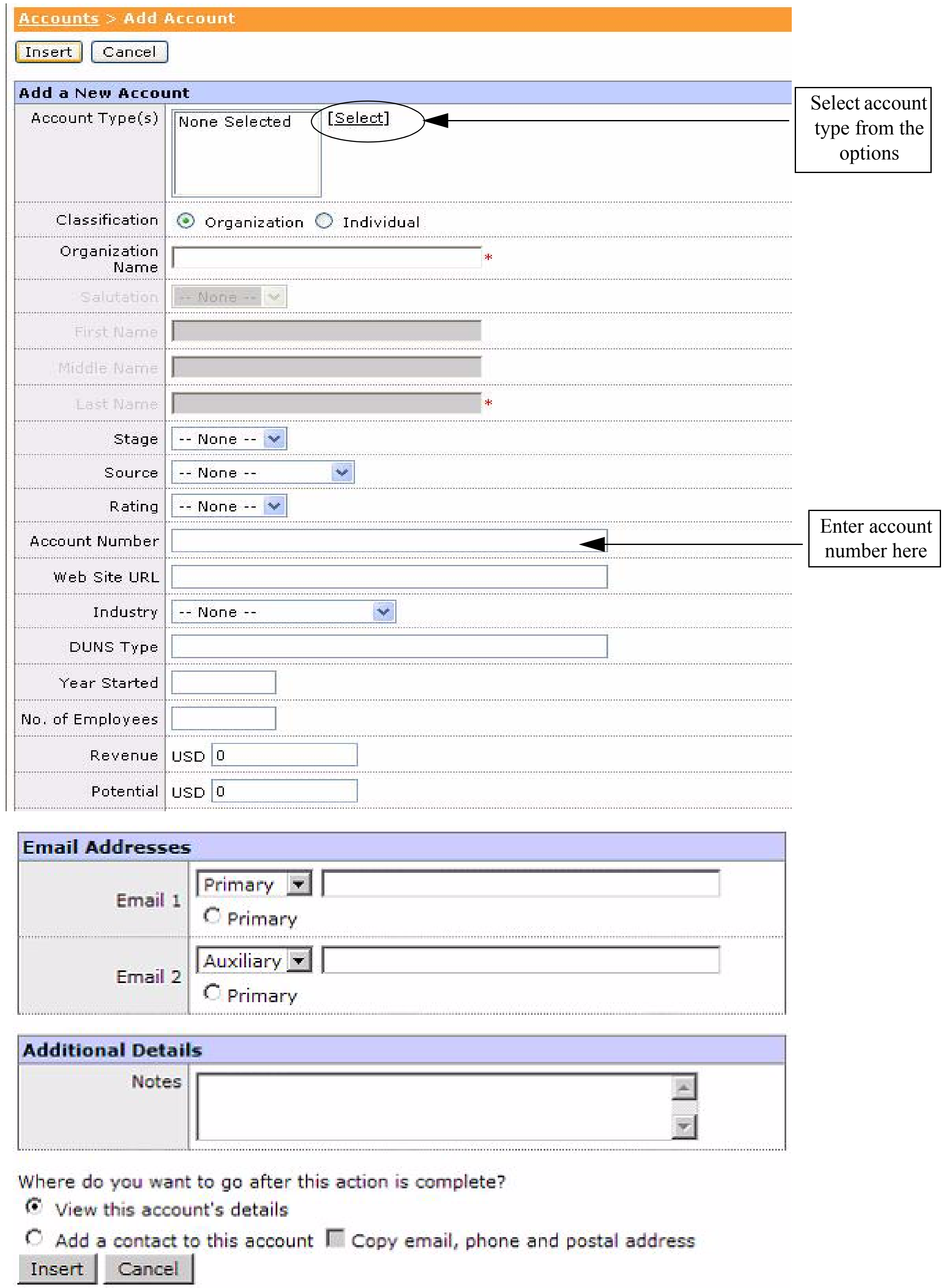


Figure 6.7 Add Account Page

You can select one of the following options at the bottom of the page:

- **View this account details** - Selecting this option enables you to view the account details.
- **Add a contact to this account** - Selecting this option enables you to add a contact to the account.

  Checking the **Copy email, phone and postal address** check-box enables you to add new contacts without having to re-enter these details. This checkbox is enabled only when you select the **Add a contact to this account** option.

Click **Insert** to save the account.

If you selected **View this account details** option before inserting the new account, you are taken to the **Account Details** page, as shown in **Figure 6.4**.

If you selected the **Add a contact to this account** option before inserting the new account, you are taken to the **Add Contact** page, as shown in **Figure 6.8**. You may enter the relevant details and click one of the following options:

- **Save** - to save the contact.
- **Save & Clone** - enables you to save the contact and add new contacts to the same account without having to re-enter common information.
- **Cancel** - to exit this page without saving.

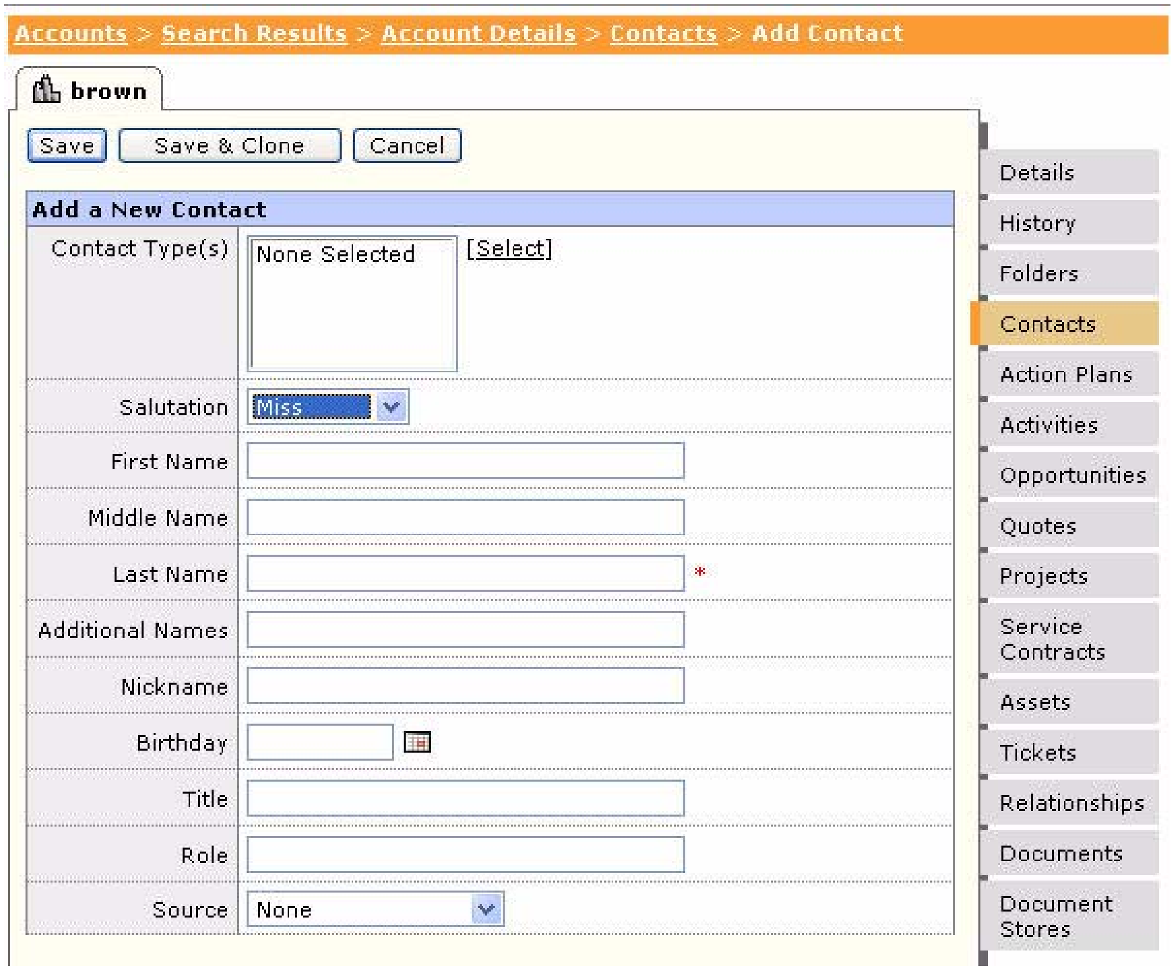


Figure 6.8 Add Contact Page

6.4 Importing Accounts

The **Accounts** module provides an import feature that enables you to import account details from an external source, saved in a Comma Separated Values (`.csv`) file into Centric CRM.

Figure 6.9 Accounts Menu Bar

To import accounts, follow the steps listed below:

1. Click **Import** on the menu bar, as shown in **Figure 6.9**.

   The **View Imports** page is displayed, as shown in **Figure 6.10**.

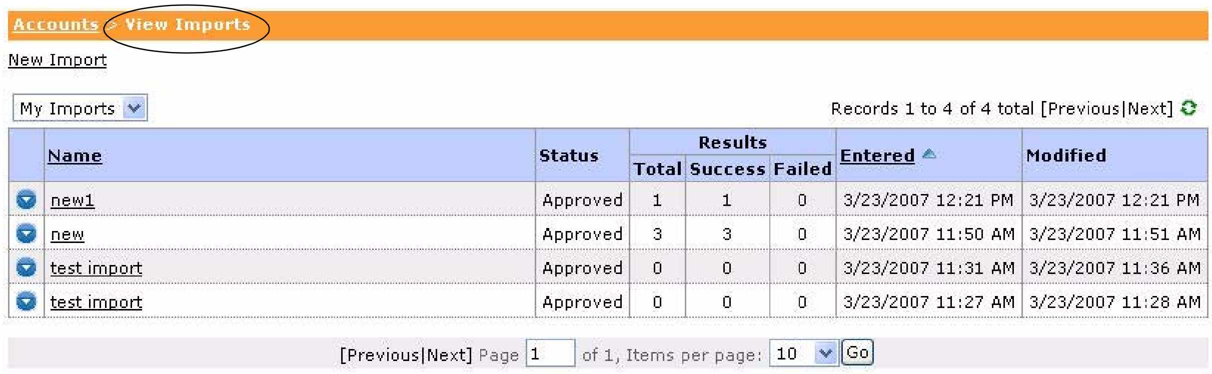


Figure 6.10 View Imports Page

2. Click **New Import,** as shown in **Figure 6.10**.

   The **New Import** page is displayed, as shown in **Figure 6.11**.

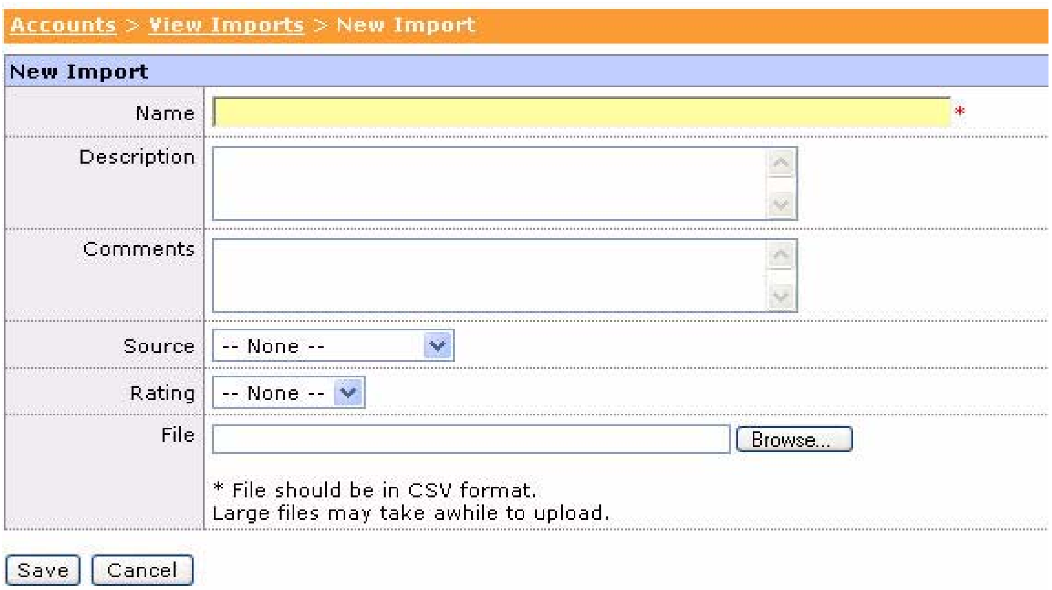


Figure 6.11 New Import Page

For more information on the procedure of importing, refer to **Section 3.5, "Importing Leads"**.

6.5 Exporting Accounts

This feature enables you to export account details. The **Export** page can be accessed by clicking **Export** on the accounts menu bar, as shown in **Figure 6.9**.

The procedure to export accounts is similar to the procedure for exporting leads. For information on exporting leads, refer to **Section 3.6, "Exporting Leads"**.

6.6 Viewing History

You can access the **History** page by clicking the **History** sub-tab on the **Account Details** page, as shown in Figure 6.12. History enables you to view information related to an account till date.

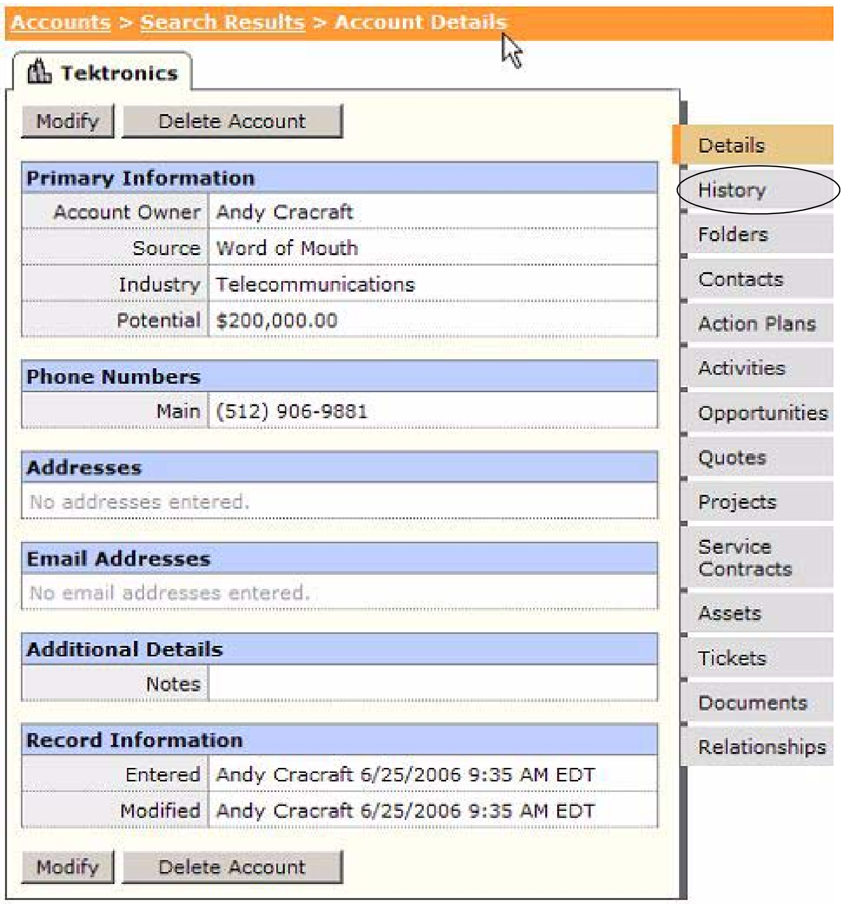


Figure 6.12 **Accessing the History Page**

You can view a specific set of history items by setting a filter. Click **Filters** to set a filter. You can set a filter, by checking the relevant checkboxes, as shown in Figure 6.13. To activate the filter, click **Apply Filters**.

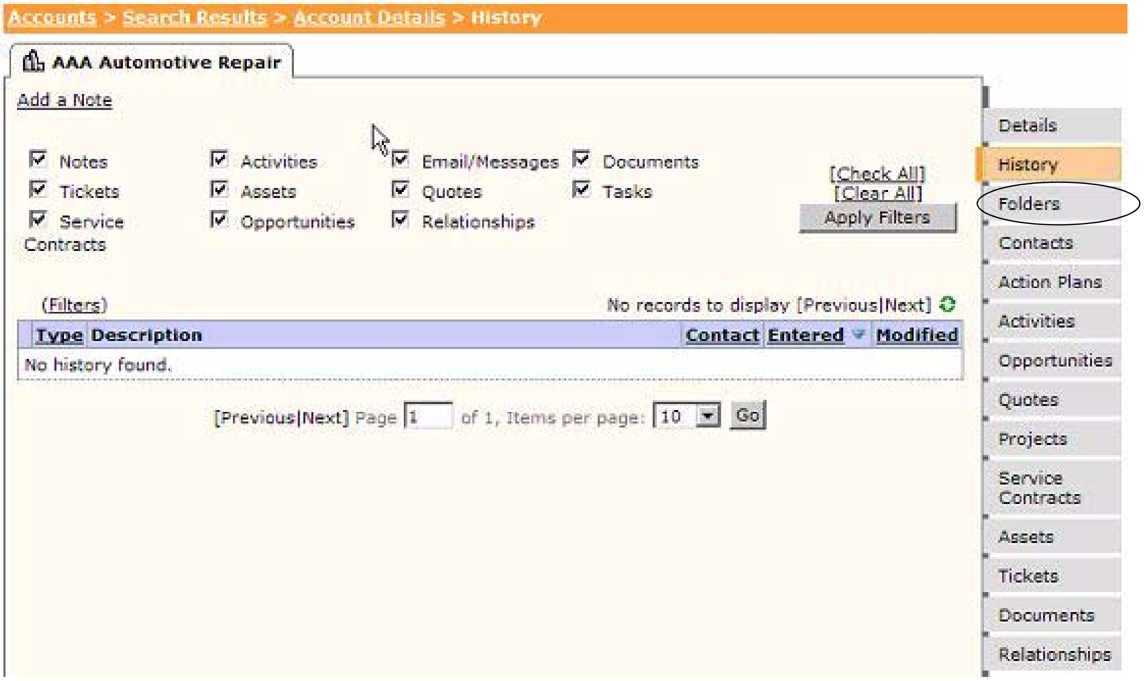


Figure 6.13 History Page

6.7 Managing Folders

Folders is a powerful feature that enables you to store information associated with an account, that is not available in the default database layout.

You can access the **Folders** page by clicking the **Folders** sub-tab on the **Account Details** page, as shown in Figure 6.14. The **Folders** page is shown in Figure 6.15.

Figure 6.14 Accessing the Folders Page

Figure 6.15 Folders Page

You can add any number of folders into this module from the **Admin** module. For more information on adding folders, refer to **Section 15.6.1, "Creating Custom Folders and Fields"**. After an administrator configures a folder and enables it, you can navigate to the account folder and enter data into the folder.

6.8 Viewing Contacts

You can access the **Contacts** page by click the **Contacts** sub-tab on the **Account Details** page, as shown in Figure 6.16.

Figure 6.16 Accessing the Contacts Page

The **Contacts** Page, as shown in Figure 6.17, displays all the contacts related to this account. By default, it will display ten contacts per page. You can add a contact by clicking **Add a Contact**. When you click the action icon in the first column of the table, a context menu is displayed.The following options are available on the context menu:

- **View Details** - to view the details of the contact
- **Modify** - to edit the details of the contact
- **Log an Activity -** to record an activity for this account
- **Schedule an Activity -** to schedule new activities
- **View Activities** - view a list of activities
- **Clone** - to duplicate the contact
- **Send Address Request** - enables you to send a message to the contact
- **Download vCard** - to download the details of the contact in vCard format
- **Delete** - to remove the contact from your database

These options are similar to that found in the main **Contacts** tab, except that the options in this menu are directly related to a contact associated with an account.

For more information on logging and scheduling activities, refer to **Section 4.5, "Recording and Planning Activities"**.

For more information on downloading vCard, refer to **Section 4.2.6, "Downloading a vCard"**.

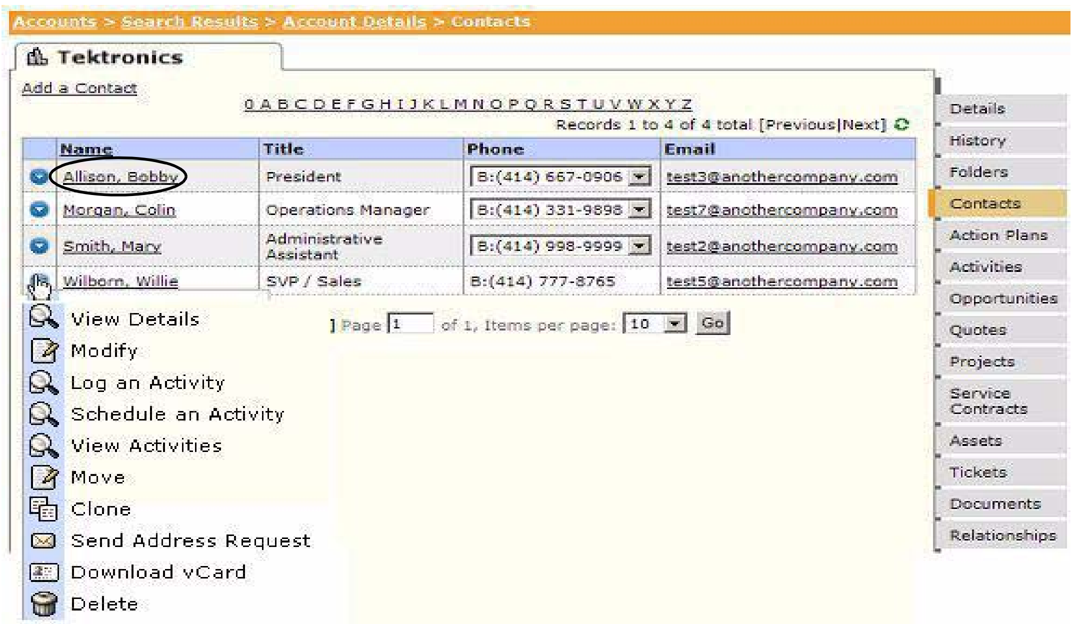


Figure 6.17 Contacts Page

One important concept that is unique to an account contact is the portal function. Portals can be viewed by selecting a contact and examining the contacts sub-tabs located at the right.

6.8.1 Accessing Messages

A chronological record of every communication sent to the contact, whether through a campaign in communications, or an email sent from another part of Centric CRM can be viewed through the **Accounts** tab.

To access message details for a contact associated with an account, follow the steps listed below:

1. Click the **Accounts** tab**,** as shown in **Figure 6.18**

   The **Search Accounts** page is displayed.

Figure 6.18 Accessing the Accounts Module

2. Specify the account details in the **Account Information Filters section**. Ensure you select **Include contacts in search results,** as shown in **Figure 6.19**.

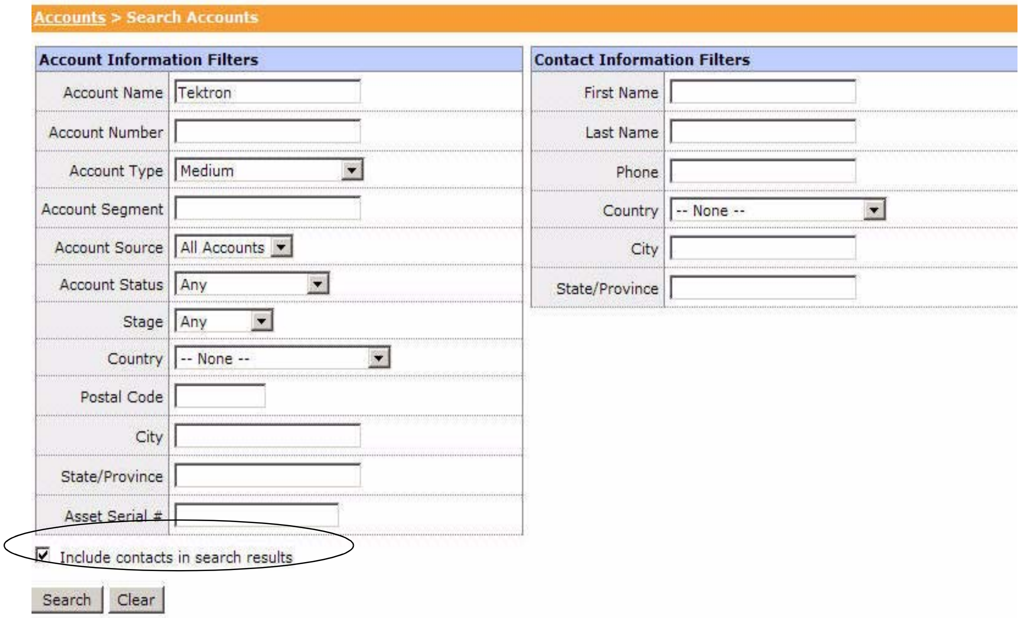


Figure 6.19 Search Accounts Page

3. Click **Search**.

   The search results are displayed.

Figure 6.20 Search Results Page

4. Click the contact name link, as shown in **Figure 6.20**.

The **Contact Details** are displayed, as shown in **Figure 6.21**.

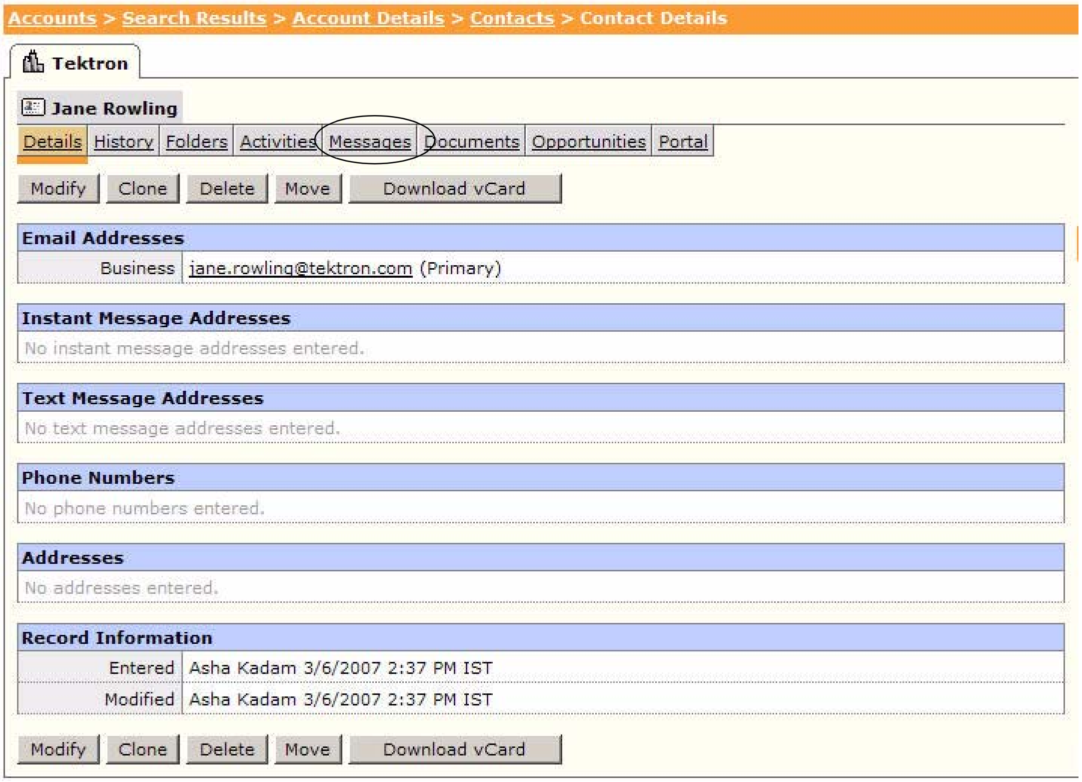


Figure 6.21 Contact Details Page

5. Click **Messages**.

   You can view the message details related to this contact, as shown in **Figure 6.22**.

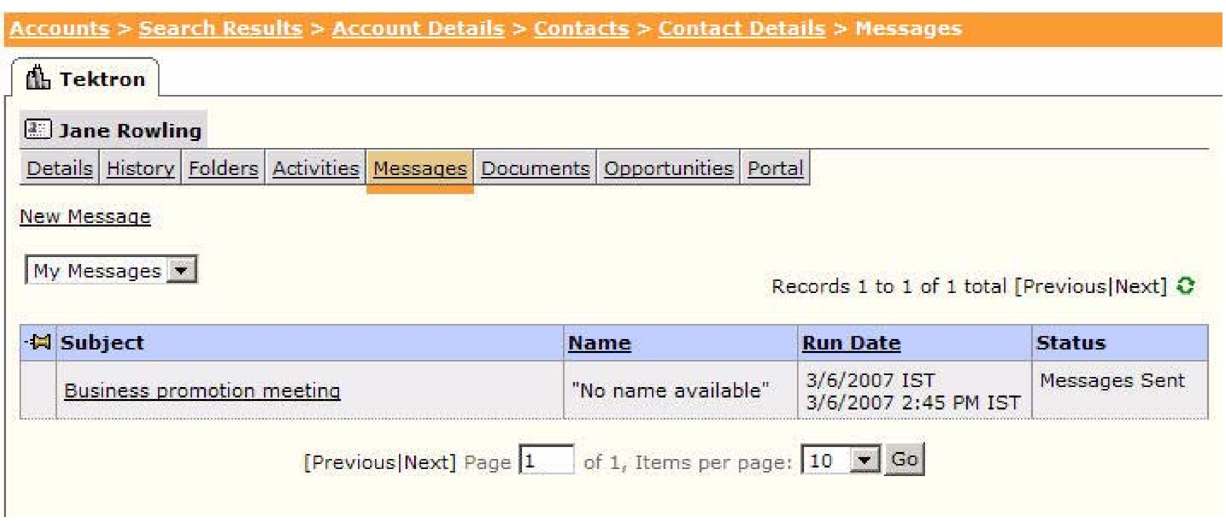


Figure 6.22 Viewing the List of Messages

6.8.1.1 Sending Messages

This section guides you through the steps of sending a new message to a contact.

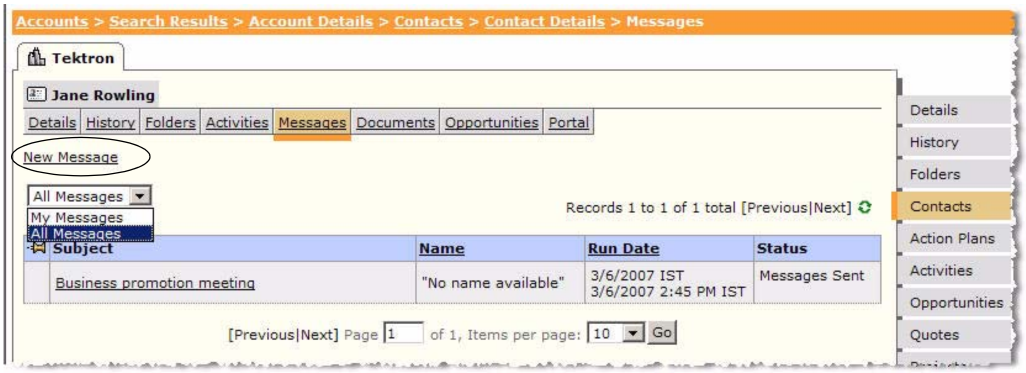


Figure 6.23 Messages Page

1. Click **New Message,** as shown in **Figure 6.23**.

   The **New Message Page** is displayed, as shown in **Figure 6.24**. You can attach files to the message.

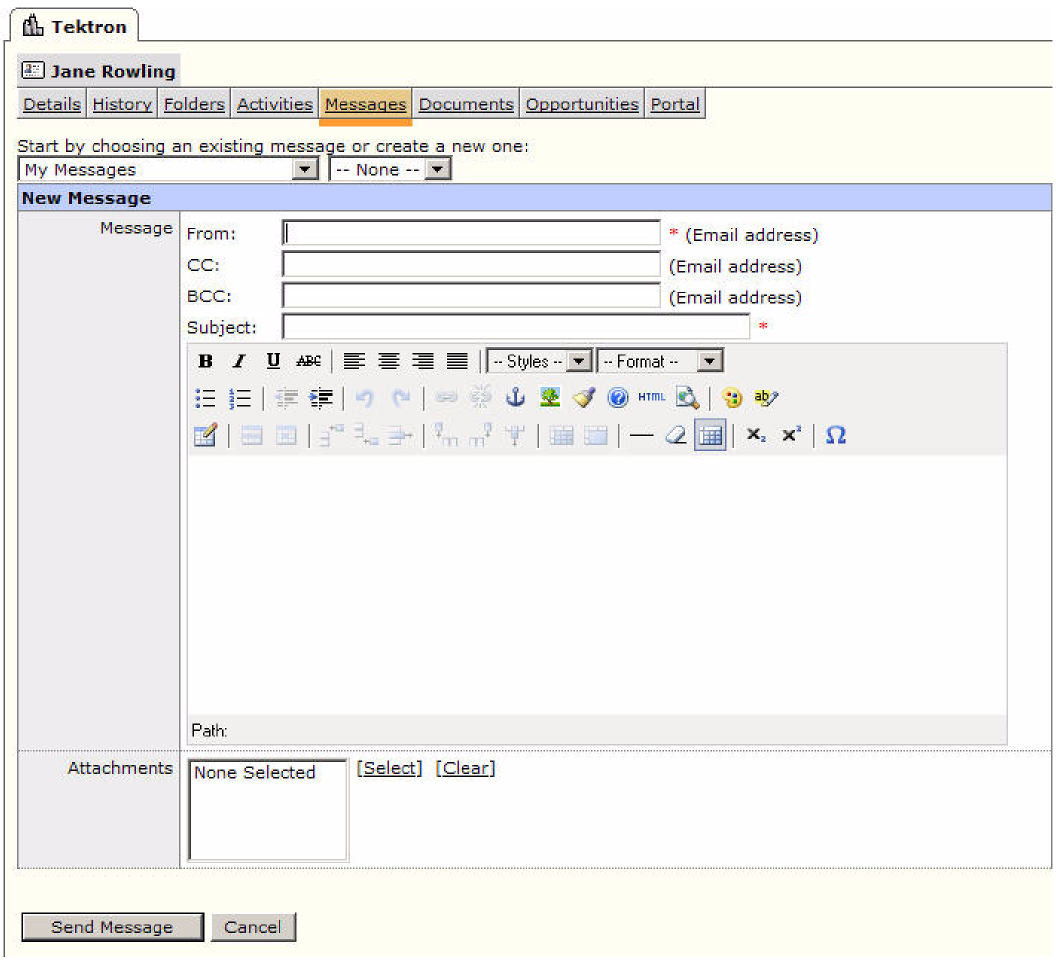


Figure 6.24 New Message Page

For more information on sending messages and attaching documents, refer to **Section 4.6, "Sending Messages"**.

6.8.2 Adding and Accessing Documents

Documents stored through the **Contacts** module, against a contact associated with an account, can be viewed through the **Contacts** page of the **Accounts** module. You can also add documents in this module.

To access the **Documents** page from the **Contact Details** page follow the steps listed below:

1. Click the contact name, as shown in **Figure 6.17**.

   The **Contacts Details** page is displayed, as shown in **Figure 6.25**.

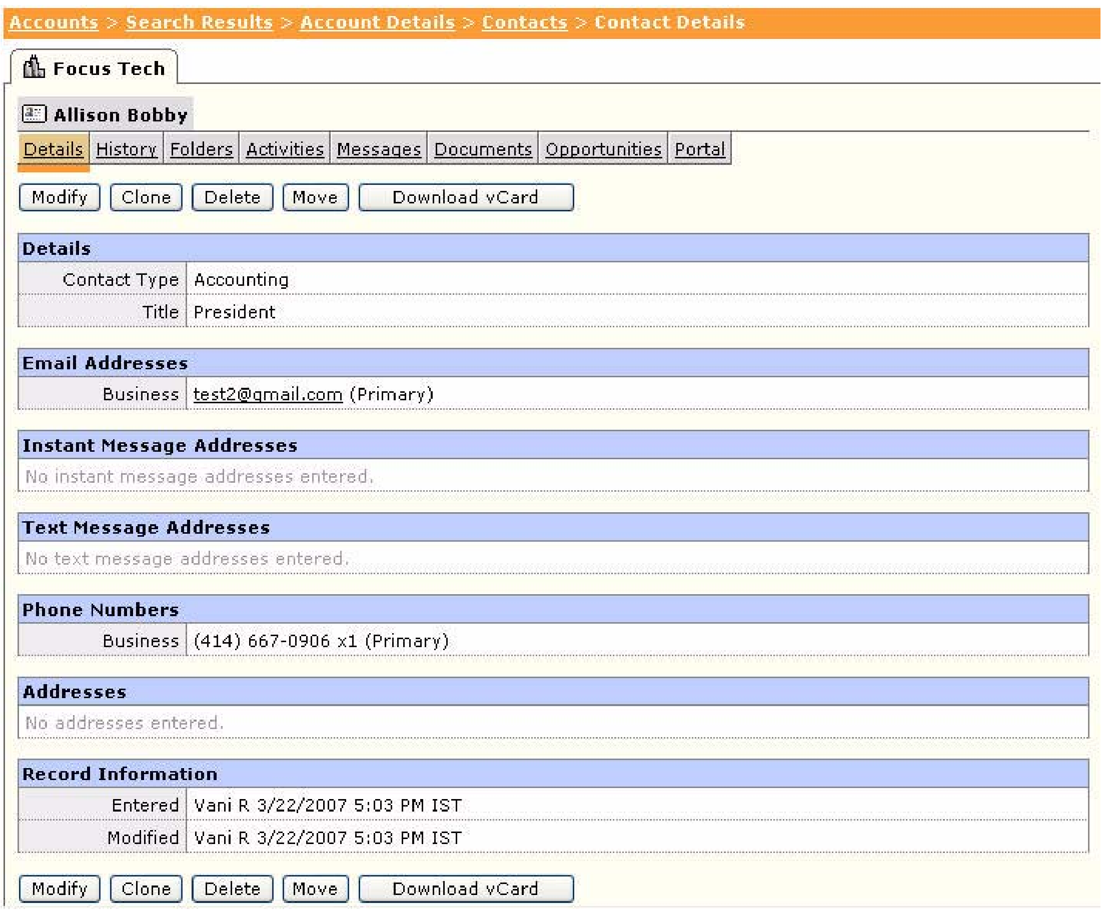


Figure 6.25 Contact Details Page

2. Click **Documents**, as shown in **Figure 6.26**.

The **Documents** page is displayed, as shown in **Figure 6.27**.

Figure 6.26 Documents Page

For more information on attaching documents, refer to **Section 4.7, "Adding and Accessing Documents"**.

6.8.2.1 Viewing Portals

The **Portals** feature provides the customers access to their account information. For example, consider a contact related to an account. This contact can view details pertaining to his account only.

If the user is not a portal user, a page displaying the status of the access is displayed, as shown in **Figure 6.27**.

You can perform the following actions on portals, as shown in **Figure 6.28**:

- Modify the information
- Set an expiry date
- Change the contact's password
- Send an email about the change

The portal users are informed of their new portal account, after it has been created, by an email.

When users log in to the portal, they can view the accounts they have access to. A page showing details of the user's account and tabs representing contacts, contracts, assets, and tickets is displayed, as shown in **Figure 6.29**.

The data is read-only, except for **Tickets**, where the users are allowed to enter a trouble ticket with a reduced set of data. This data will be displayed in the **Help Desk** module and will also be associated with the account.

The **Portal** feature provides added service to an existing customer. This feature acts as a gateway that enables you and your customer to work together to keep information updated.

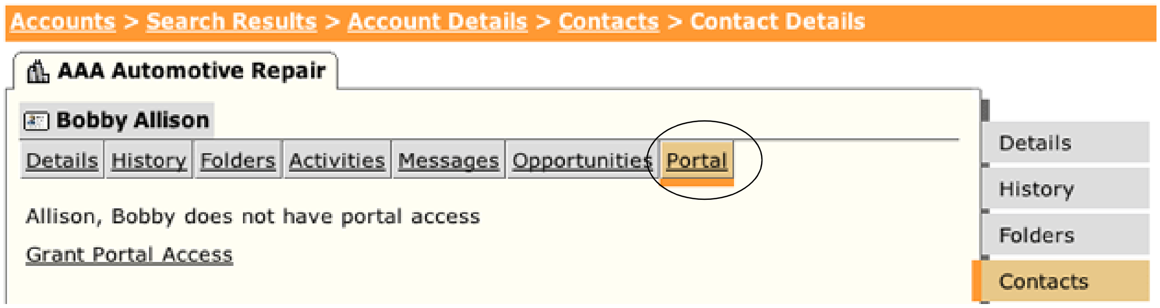


Figure 6.27 Account Contacts' Portal Access

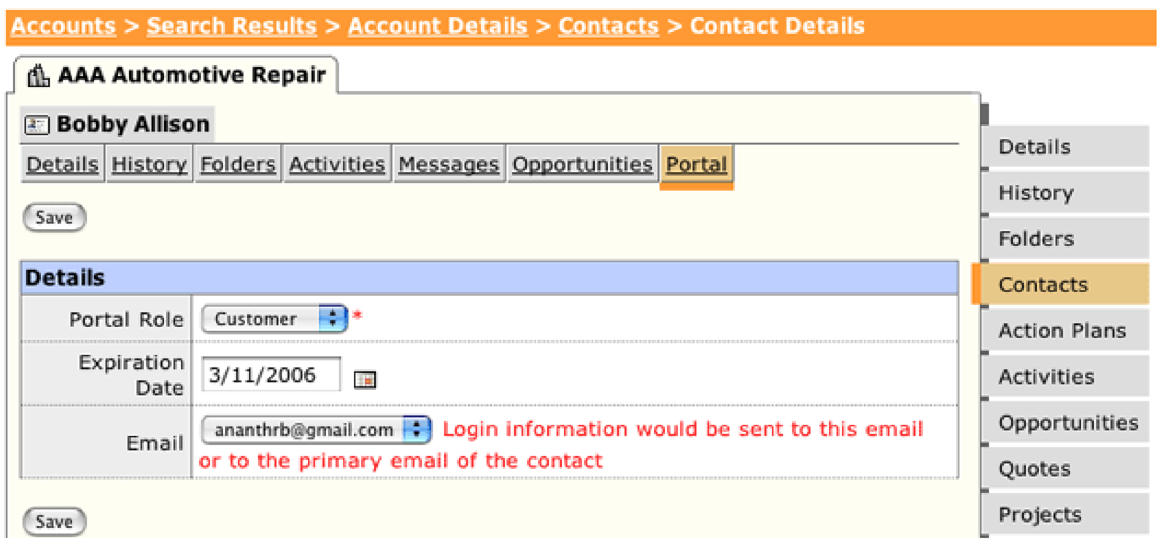


Figure 6.28 Granting Portal Access

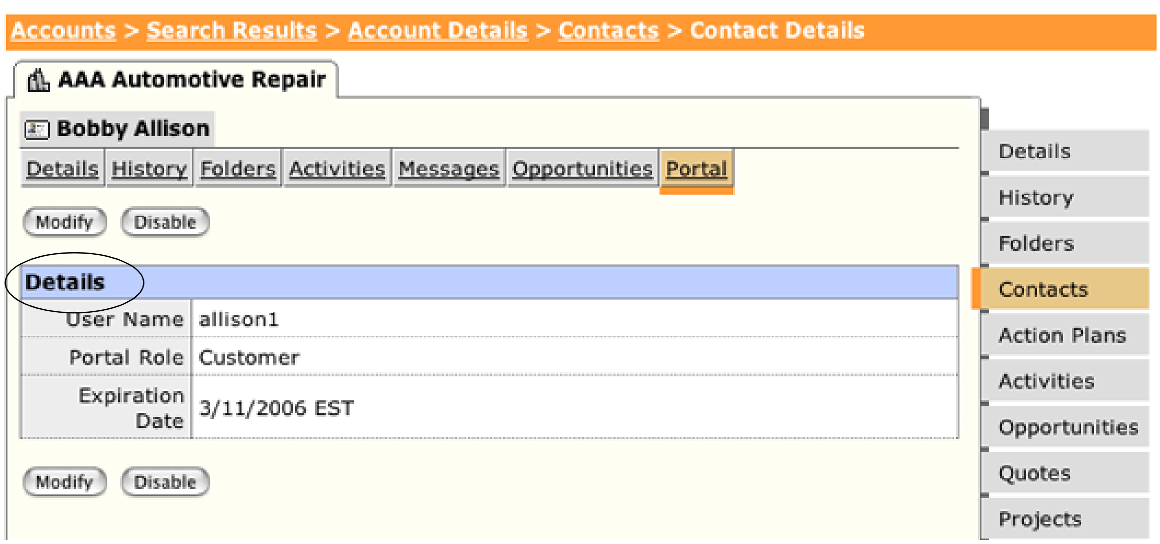


Figure 6.29 Portal Access Details

6.9 Managing Action Plans

Clicking the **Action Plan** sub-tab displays the **Action Plans** page, with a list of action plans created for a particular account, as shown in **Figure 6.30**. Action plans requiring attention are highlighted. For more information on creating action plan templates, refer to **Section 15.6.2, "Using Action Plan Editor"**.

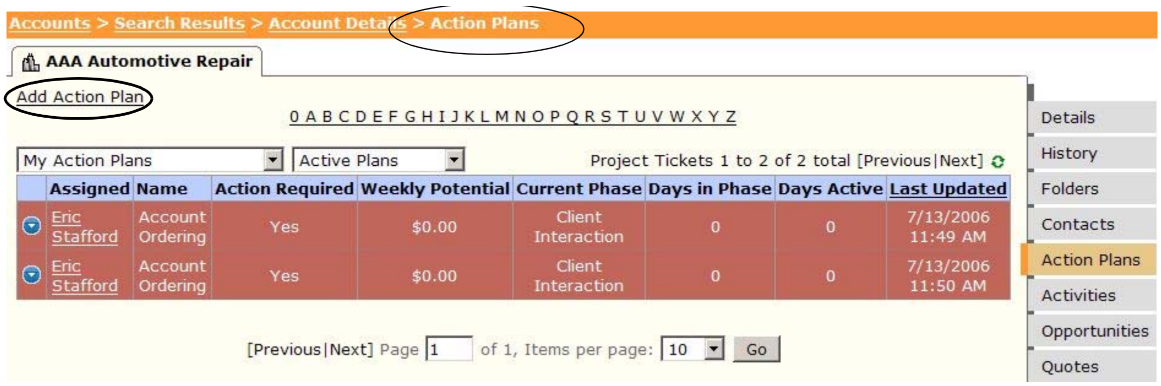


Figure 6.30 Action Plans Page

6.9.1 Adding an Action Plan

An action plan can be created for an account by clicking **Add Action Plan** on the **Action Plans** page, as shown in **Figure 6.30**. The **Add Action Plan** page is displayed, as shown in **Figure 6.31**. The following fields are required entries for adding an action plan:

- Name of the action plan
- Manager of the action plan
- User assigned to the action plan

The manager of the plan has the permission to perform the following tasks:

- restart the action plan
- re-assign the action plan
- delete the action plan

The user assigned to the action plan is responsible for completing the steps specified in the action plan.

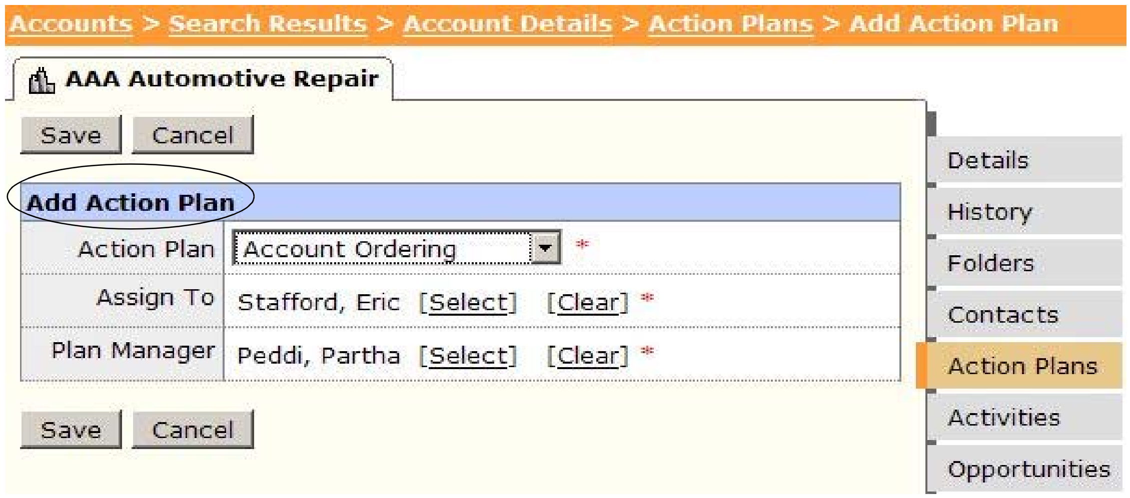


Figure 6.31 Add an Action Plan for an Account

6.9.2 Viewing Action Plan Details

When you click the action icon on the **Action Plans** page, as shown in **Figure 6.32**, a context menu is displayed. Selecting **View Action Plan** on this menu enables you to view the **Action Plan Details** page, as shown in **Figure 6.33**.

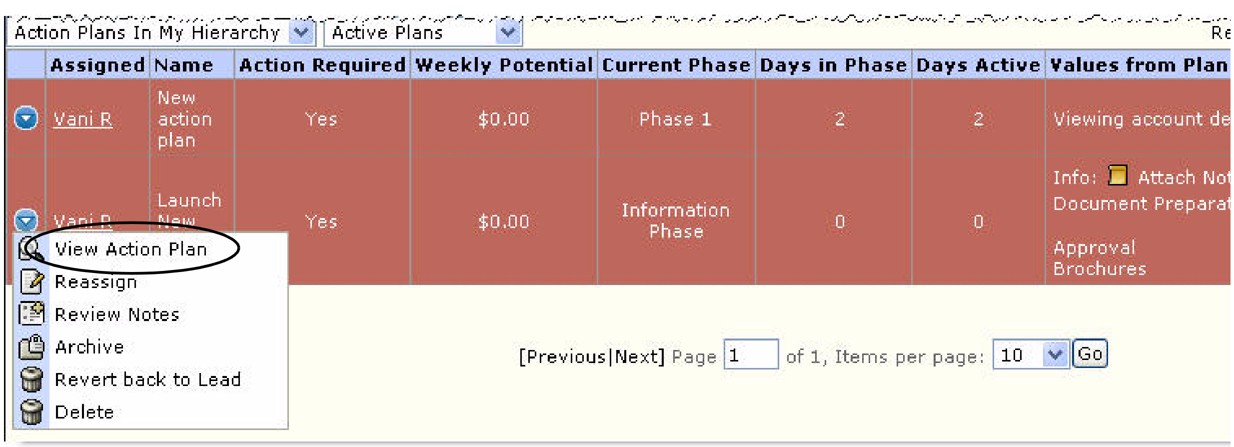


Figure 6.32 Viewing the Context Menu

This page displays the various phases in the action plan. Each phase consists of a series of sequential steps. Steps of an action plan can be completed in the **Action Plan Details** page, as shown in **Figure 6.33**.

Each step can be completed by a single user or a set of users as defined in the action plan template. The current phase and steps are highlighted in the **Action Plan Details** page. You can complete the highlighted steps of the current phase or any one of the steps of the global phase. On completion of one step of the action plan, email alerts are sent to the owners of the current and the next steps of the plan. You can also add, or attach, or review several actions for steps of a plan.

Once all steps of a phase are completed, the steps of the next phase are highlighted. On completion of the last phase of the plan, the plan is said to be completed.

Clicking the action icon beside **Actions** displays a context menu, as shown in **Figure 6.33.** The options available on this menu enable the plan manager to reassign, restart, or delete the plan.

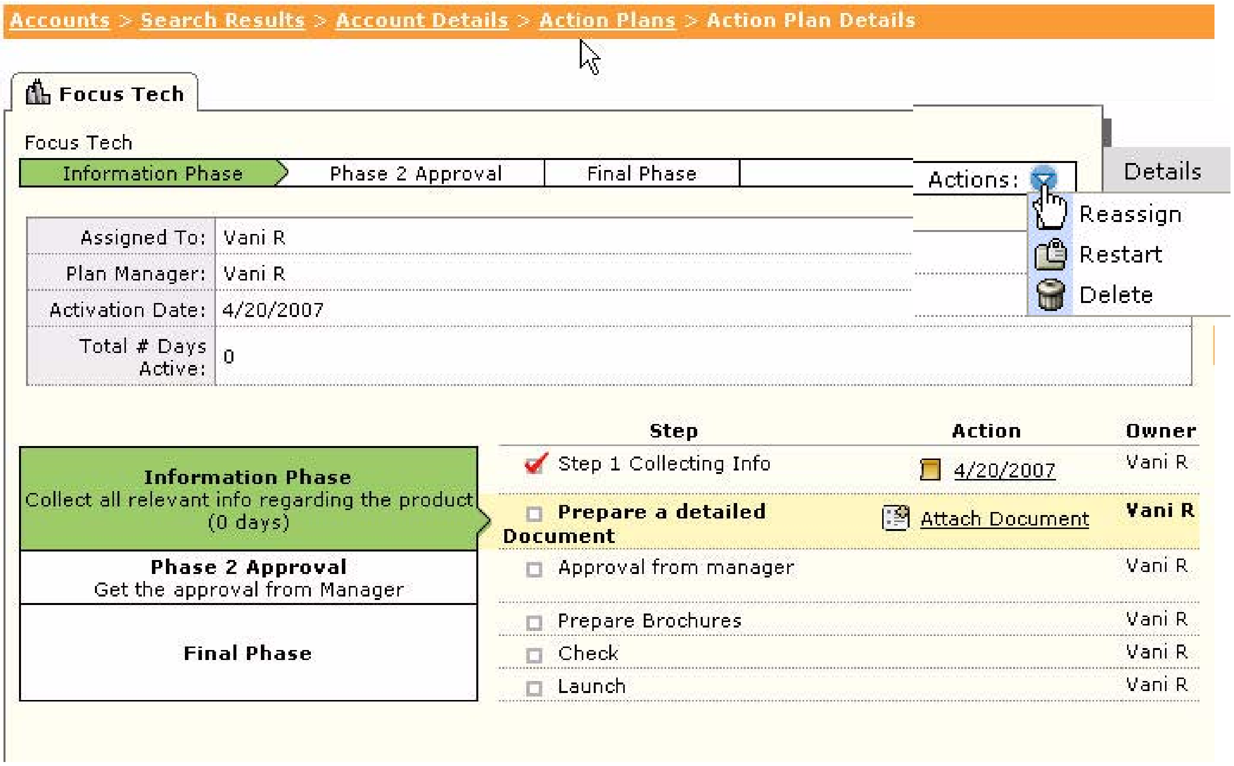


Figure 6.33 Action Plan Details Page

6.10 Adding Activities

The **Activities** feature in the **Accounts** module is almost identical to those in the **Contacts** and **Pipeline** modules. While the **Contacts** module's **Activities** page displays only those activities that are associated with a particular contact, and the **Pipeline** module's **Activities** page only displays activities related to a particular opportunity, the **Activities** page in the **Accounts** module displays all activities for an account across contacts.

The **Activities** feature in the **Accounts** module enables you to record activities as they occur, and to plan your future course of action by scheduling activities.

You can record activities and schedule activities for the following entities:

a. An account, without specifying the contacts.

b. A particular contact associated with an account.

To record an activity for an account without specifying the contacts, follow the steps listed below:

1. Search for the account.

For more information on searching for an account, refer to **Section 6.2, "Searching for an Account"**. The **Search Results** page is displayed, as shown in **Figure 6.34**.

Figure 6.34 Viewing the Search Results

2. Click the account name link, as shown in **Figure 6.34**.

   The **Account Details** page is displayed, as shown in **Figure 6.35**.

Figure 6.35 Viewing the Account Details Page

3. Click **Activities,** as shown in **Figure 6.35**.

A new page allowing you to log an activity or schedule an activity for the account is displayed, as shown in **Figure 6.36**.

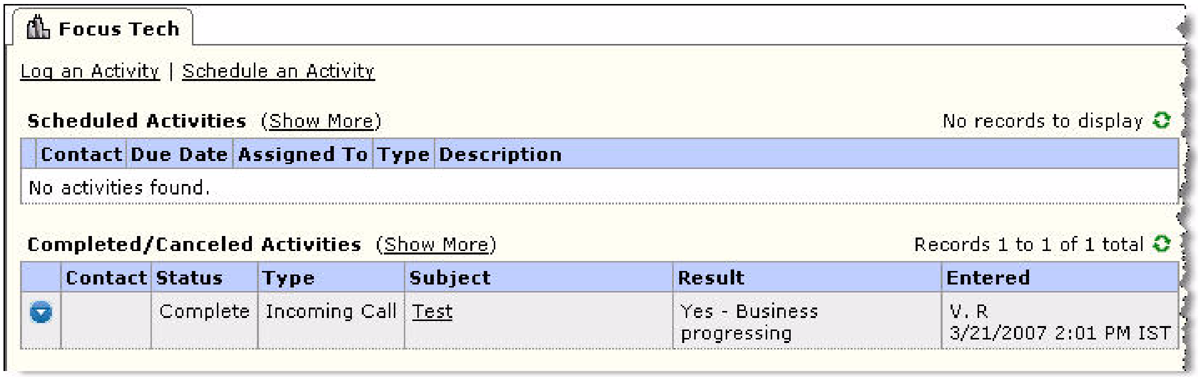


Figure 6.36 Logging and Scheduling an Activity

For more information on logging activities and scheduling activities, refer to **Section 4.5.1, "Log an Activity"** and **Section 4.5.2, "Schedule an Activity"**.

To record an activity for a particular contact associated with an account, follow the steps listed below:

1. Search for the account.

   For more information on searching for an account, refer to **Section 6.2, "Searching for an Account"**. The **Search Results** page is displayed, as shown in **Figure 6.37**.

Figure 6.37 Viewing the Search Results Page

2. Click the account name, as shown in **Figure 6.37**.

   The **Account Details** page is displayed, as shown in **Figure 6.38**

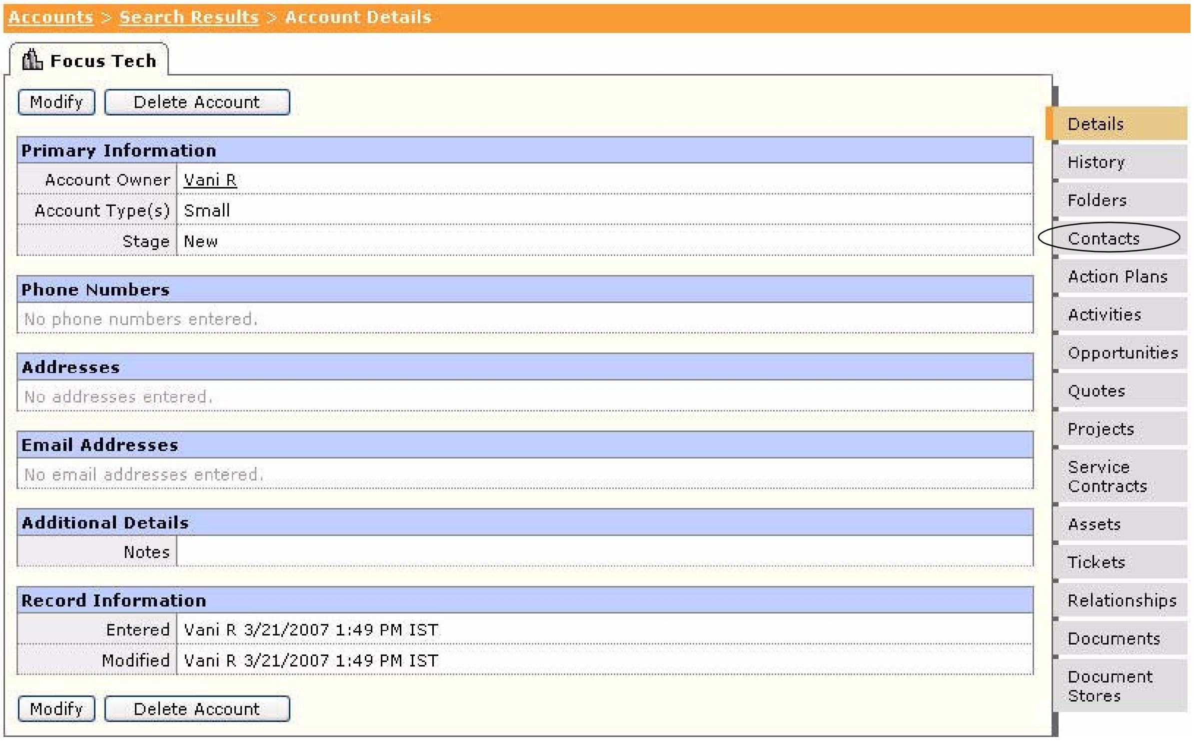


Figure 6.38 Viewing Account Details

3. Click the **Contacts** sub-tab, as shown in **Figure 6.38**.

   A list of contacts associated with this account is displayed, as shown in **Figure 6.39**.

Figure 6.39 Viewing Contact List

4. Click the contact name link, as shown in **Figure 6.39**.

The contact details are displayed, as shown in **Figure 6.40**.

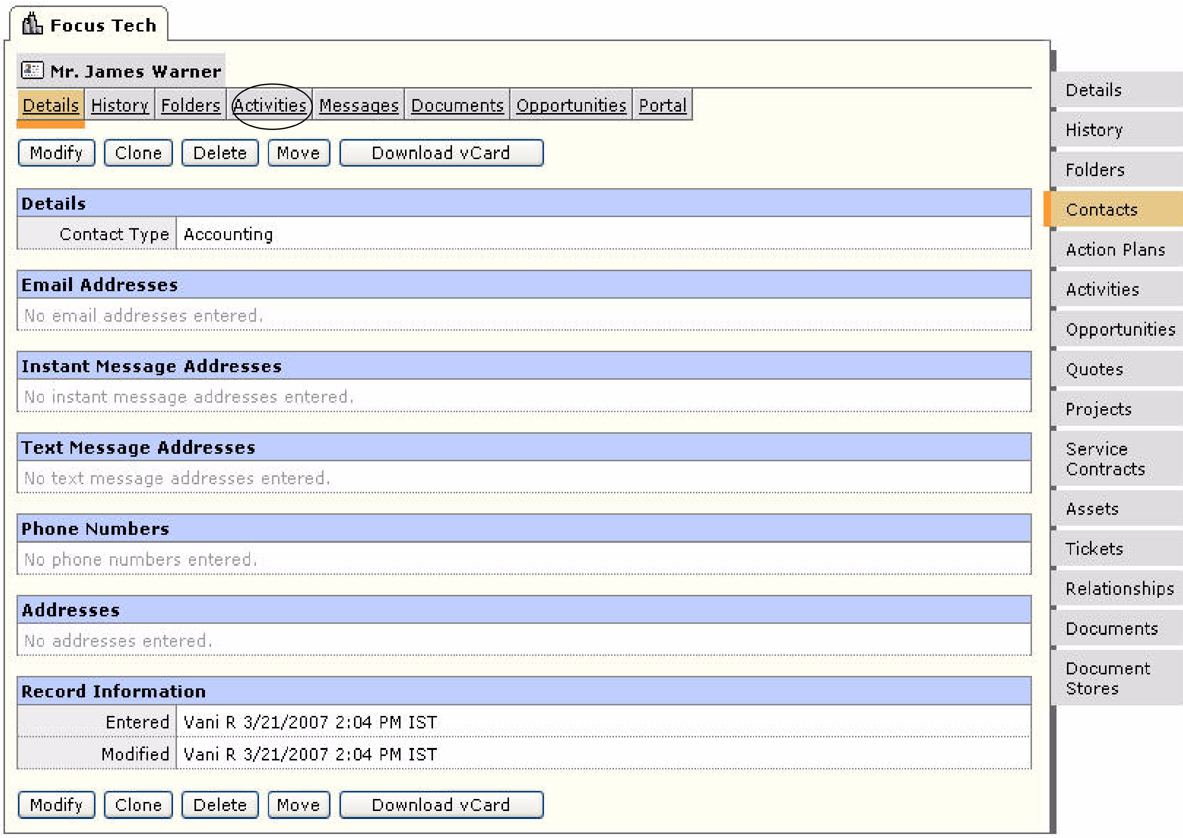


Figure 6.40 Viewing Contact Details

5. Click the **Activities** link, as shown in **Figure 6.40**.

   A new page allowing you to log an activity or schedule an activity for the contact "Mr.James Warner" who is associated with the account "Focus Tech" is displayed, as shown in **Figure 6.41**.

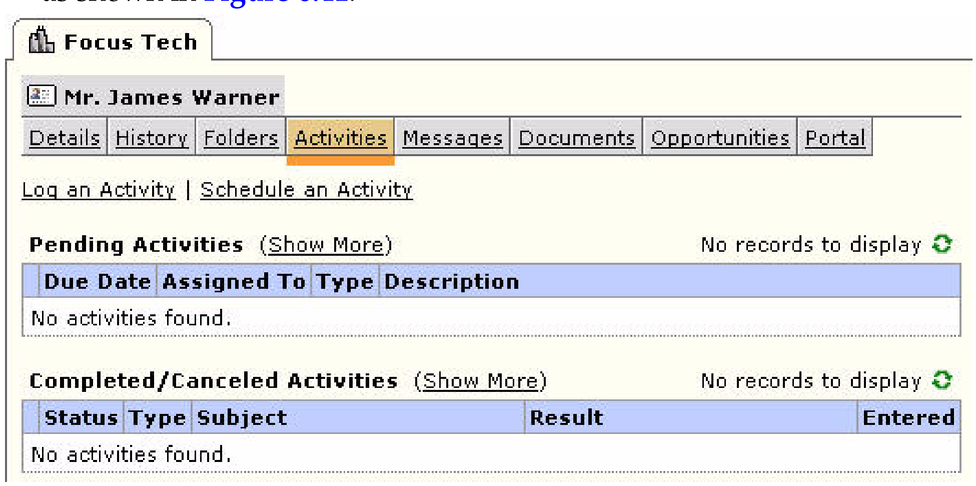


Figure 6.41 Viewing the Activities Window

For more information on logging activities and scheduling activities, refer to **"Log an Activity"** and **"Schedule an Activity"**.

6.11 Adding Opportunities

The **Opportunities** feature in the **Accounts** module is similar to that in the **Pipeline** module, except that all the opportunities in this module are related to the account that you are currently viewing.

Clicking the **Opportunities** sub-tab on the **Account Details** page displays the **Opportunities** page, as shown in **Figure 6.42**. This page lists the opportunities associated with the account you are viewing.

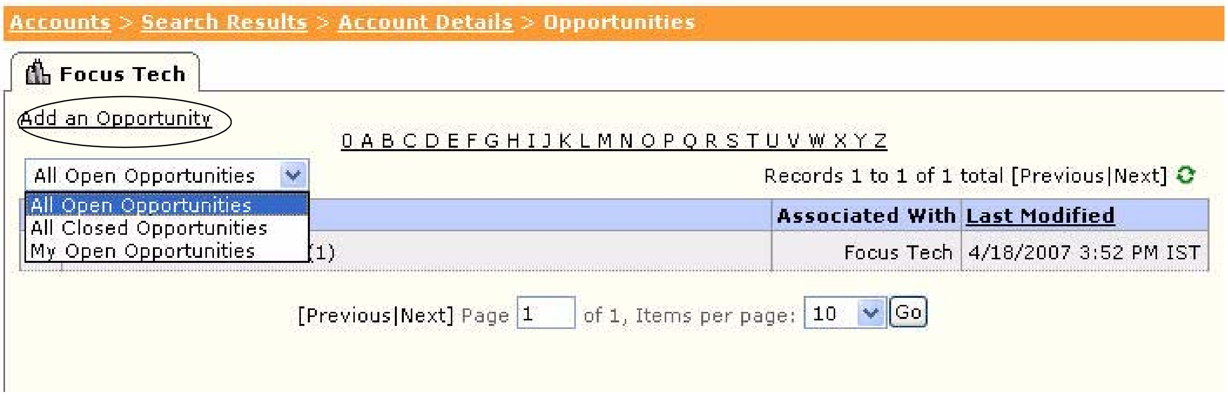


Figure 6.42 Opportunities Page

You can filter the viewed list of opportunities by selecting any one of the following options from the drop-down list in the upper left of the page, as shown in **Figure 6.42**.

- **My Open Opportunities**
- **All Open Opportunities**
- **All Closed Opportunities**

You can also add an opportunity by clicking the **Add an Opportunity** link, as shown in **Figure 6.42**.

To examine any opportunity, click the name of the opportunity. This displays the **Opportunity Details** page, summarizing its components, as shown in **Figure 6.42**.

Figure 6.43 Viewing the Component Details

6.12 Adding Quotes

Your customers will need to be informed of your offers and prices. These are usually in the form of a quote. Clicking the **Quotes** sub-tab on the **Account Details** page displays the **Quotes** page with the details of all the quotes related to an account, as shown in **Figure 6.44**. You can add a quote by clicking the **Add a Quote**. For more information on adding quotes, refer to **Section 8.3, "Adding a Quote"**.

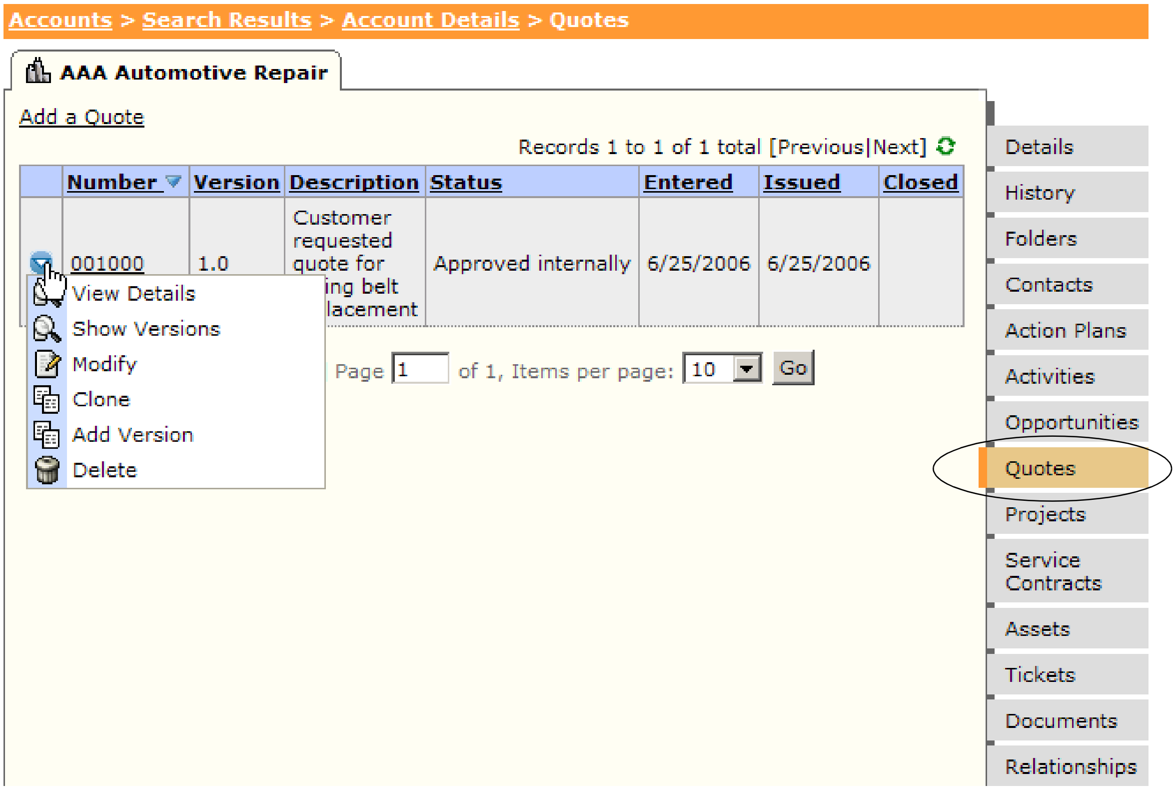


Figure 6.44 Quotes Page

Clicking the action icon in the first column of the tabular listing displays a context menu which allows you to perform the following tasks:

- View quote details
- View different versions of quote
- Modify or clone a quote
- Add another version or delete a quote

For detailed information on quotes, refer to Chapter 8, "Understanding Quotes".

6.13 Viewing Projects

You can access the **Projects** page by clicking the **Projects** sub-tab on the **Account Details** page. A typical **Projects Page** is shown in Figure 6.45.

This page displays all projects related to an account.

For detailed information on projects, refer to Chapter 10, "Managing Projects".

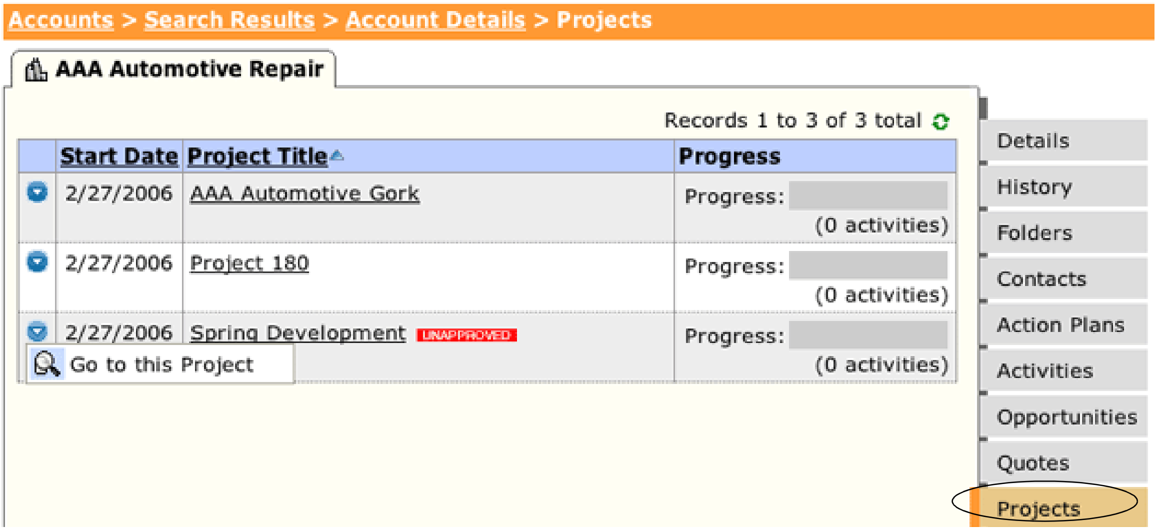


Figure 6.45 Account's Projects List

6.14 Viewing Service Contracts

The **Service Contracts** feature is designed to fit the needs of organizations that provide long- or short-duration contracted services to their customers. For example, electrical maintenance contracts or computer hardware maintenance contracts are well-suited to being managed for this module.

Contracts are attached to accounts, and may also have assets attached to them. Assets are items under contract, and might include hardware of various sorts, or computer software, or even a swimming pool for a pool-maintenance business.

Clicking the **Service Contracts** sub-tab on the **Account Details** page displays the **Service Contracts** page, which summarizes the contracts in place for the account in question, as shown in **Figure 6.46**.

When you click the action icon, a context menu is displayed. This menu provides the following options:

- **View Details** - view details of an existing contract
- **Modify** - modify details of an existing contract
- **Delete** - delete an existing contract

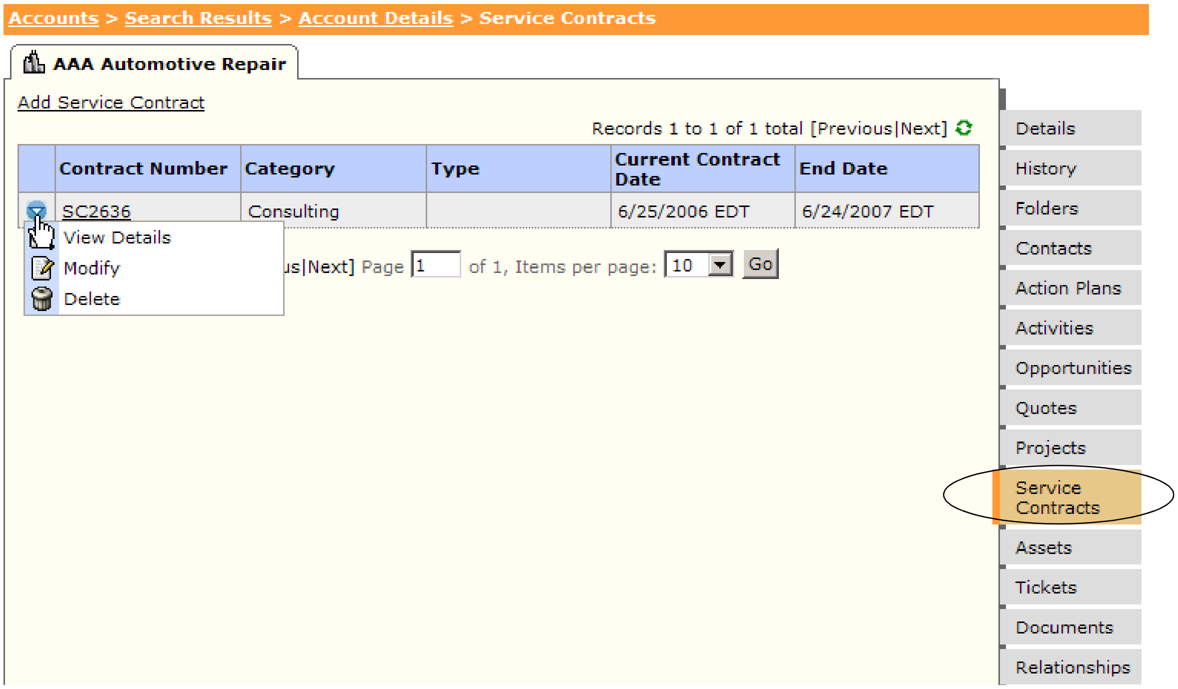


Figure 6.46 Service Contracts Page

Click the **Add Service Contract** link to add a service contract. **Add Service Contract** page is displayed, as shown in Figure 6.47.

You can enter the following details:

- Contract number
- Initial contract date
- Start and end dates of the contract
- Category and type of the contract
- Labor categories of work done in connection with this contract
- Customer contact for the contract
- Description and billing notes for the contract
- Hours off the contract, for an hourly-based contract and Service Level Agreement(SLA) information

---

Important: All fields marked with a red asterisk are mandatory. They include service contract number, initial contract date, and the SLA information.

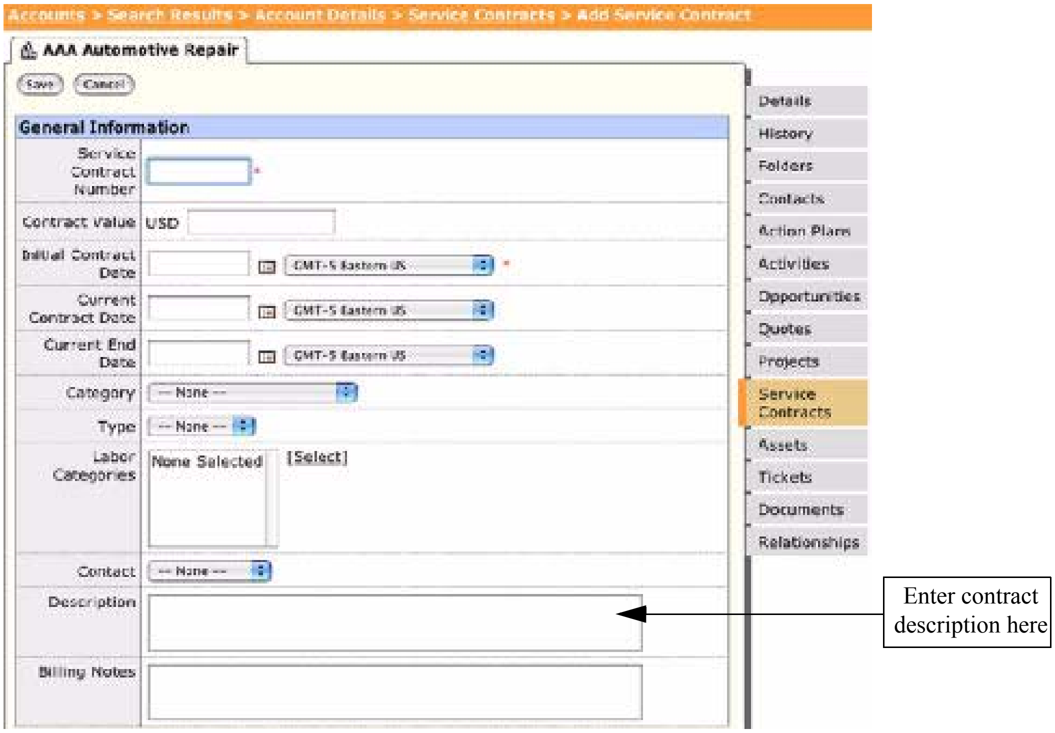


Figure 6.47 Add Service Contract Page

6.14.1 Using Contracts

Contracts can be used in several ways. They are referenced from the **Help Desk** module. When a customer has a problem and a help desk ticket is created, it is associated with a contract. **Contracts** provide the following information:

- How to charge the customer for a fix?
- How quickly must you respond?

If the customer paid for a block of service time, then the time used to fix a problem gets automatically subtracted from the service hours left on the contract. A variety of SLA fields in the contract are used to escalate problems and deliver special alerts.

6.15 Assets

Assets can be used with contracts, or separately. Click the **Assets** sub-tab of the Account Details page to view the **Assets** page. A typical **Assets** page is shown in **Figure 6.48**.

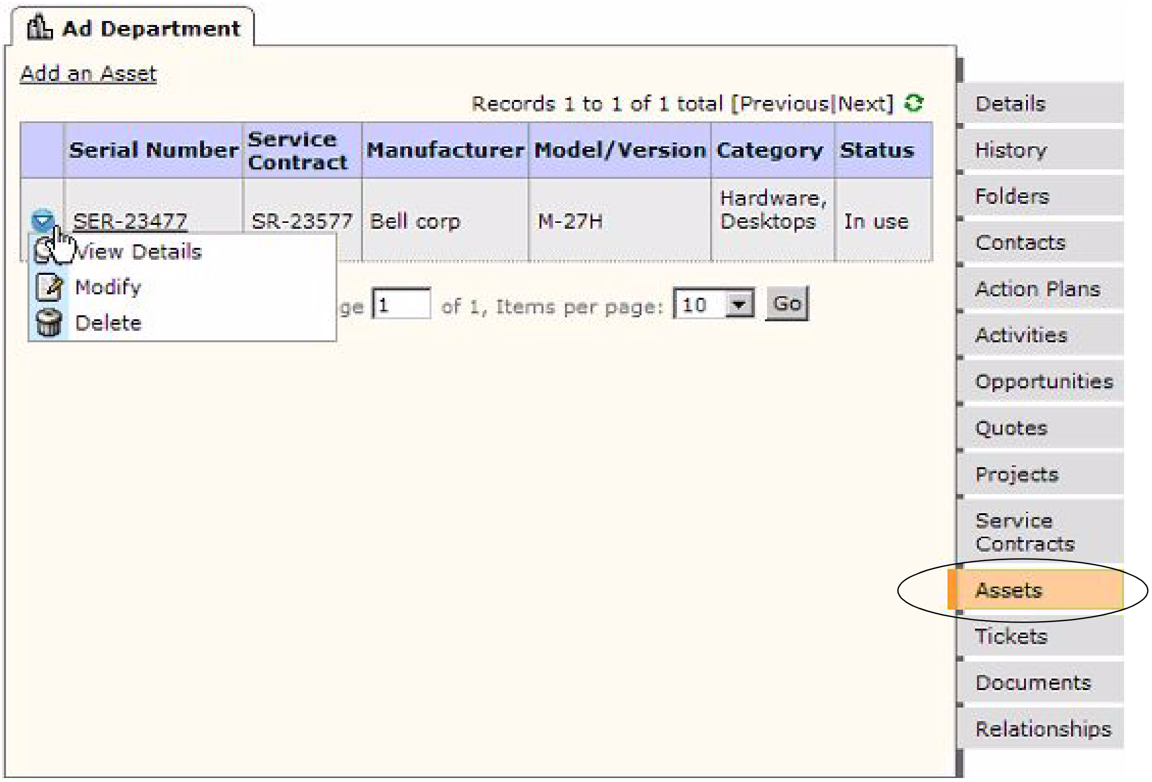


Figure 6.48 Assets Page

This page displays all the assets belonging to the particular account. The summary includes the following details:

- Serial number under which the asset is serviced
- Manufacturer of the asset
- Model of the asset
- Category and status of the asset

Clicking the action icon, displays the context menu. If you need to modify asset information, click **Modify** on this menu to view the **Asset Details** page.

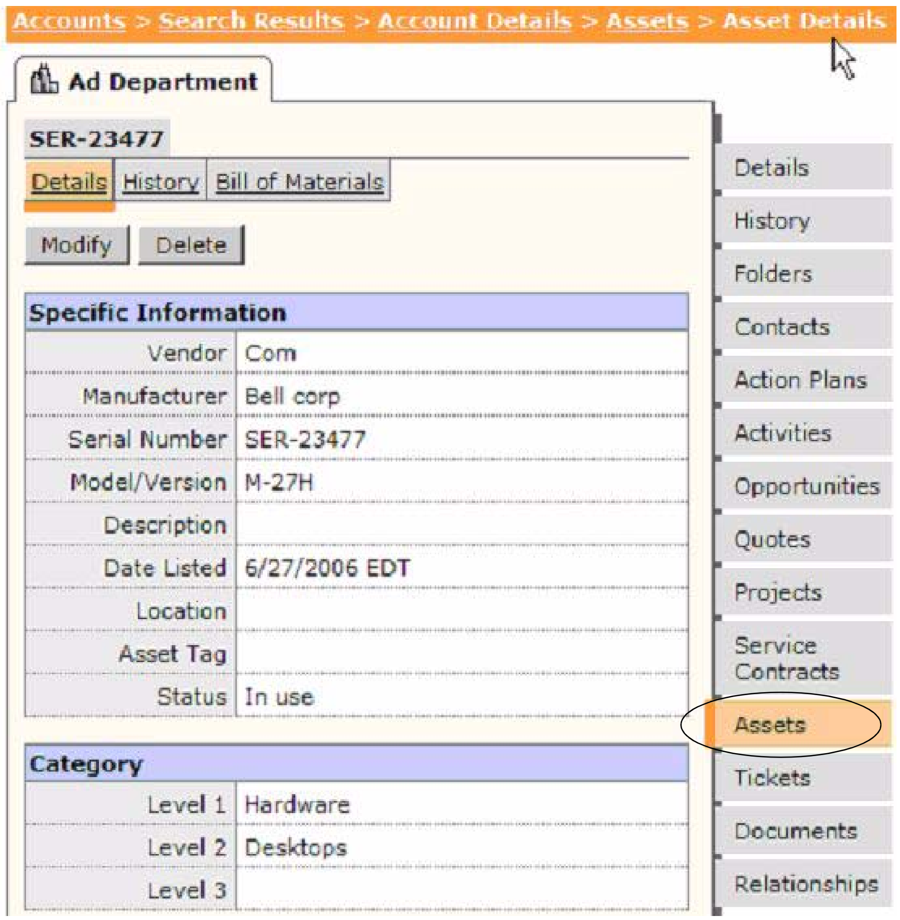


Figure 6.49 Modify Asset Details Page

This page contains the following fields that need to be entered:

- **Specific information**- This includes information regarding the following fields:
  - Vendor
  - Manufacturer
  - Version/model
  - Location
  - Status
- **Category** - a category associated with the asset
- **Service Contract** - includes the service contract number and the contact information
- **Service Model Options** - includes information on methods used to respond to a problem
- **Warranty Information** - which includes the following details:
  - Expiration date
  - Inclusions
  - Exclusions

- **Financial Information** - includes the purchase date, from whom the purchase has been made, and the cost of the asset
- **Other Information** - includes any notes you want to enter

Note: Only a part of the entire screen is shown in **Figure 6.49**.

6.15.1 Using Assets

Assets are used in service centers for documenting and resolving problems. For example, if you run an air- conditioning company, you will want to track what equipment you installed for the customer and provide service for that equipment. Assets and contracts help you in doing these tasks.

Every time you service an asset, that service is completely documented and stored in a service history with the asset. You can view the history at any time by clicking the **History** button in the **Asset Details** page.

Assets and contracts can be used to manage your own IT infrastructure by creating an account for your own company, and then building your own contracts, SLAs, and assets. You can manage it all through your own inward-focused help desk.

6.16 Managing Tickets

The **Tickets** page can be accessed by clicking the **Tickets** sub-tab of the **Account Details** page. This page summarizes all help desk items relating to the account. These items can be categorized as:

- Problem reports and resolutions
- Requests for information
- Other issues with the account

Centric CRM provides a full-featured **Help Desk** module. The **Tickets** page contains a complete subset of the whole help desk module, as applicable to a specific customer account. The **Tickets** page lists both the open and closed ticket items, as shown in **Figure 6.50**.

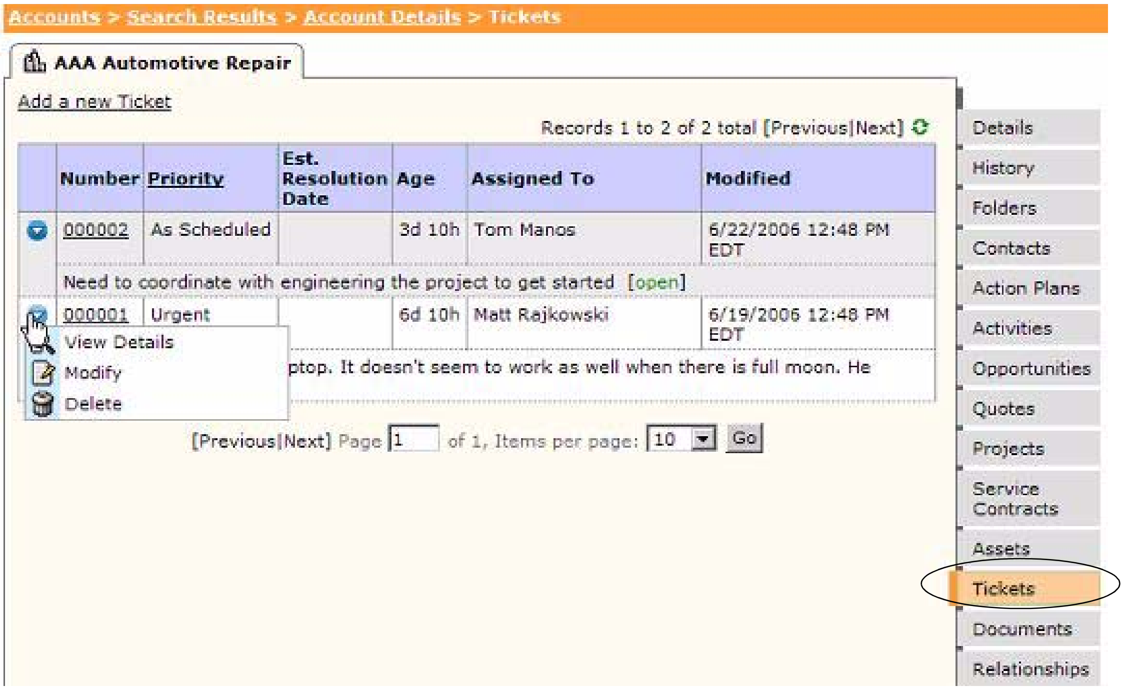


Figure 6.50 Tickets Sub-Tab

This page provides you with information on issues an account has now, and has had in the past. You can also view how responsive you have been to their problems or requests. This indicates the level of customer satisfaction with your products and services.

Clicking the action icon displays a context menu. You can perform any one of the tasks listed below from the options on the context menu:

- View existing tickets
- Modify tickets
- Delete tickets

To add a ticket, click **Add a new Ticket** link, as shown in **Figure 6.50**.

To view an existing ticket, click the Ticket Number, to display information regarding the ticket, and a number of sub-tabs for additional information.

You can assign a ticket to a department or a person for resolution by modifying it. You can enter ticket information in a very flexible knowledge base for later search and retrieval. You can also describe the fix and close a ticket.

6.16.1 Managing Documents

Document Management is a recurring feature in Centric CRM. This feature is found in the following modules:

- **Pipeline** module. You can store presentations and proposals here.
- **Accounts** module. You can store contracts and other legal documents here.
- **Projects** module. You can store a variety of project-oriented materials in this module.

- **Tickets**. You can store service related information in this module.

All documents are managed by the standard Centric CRM security and permissions system.

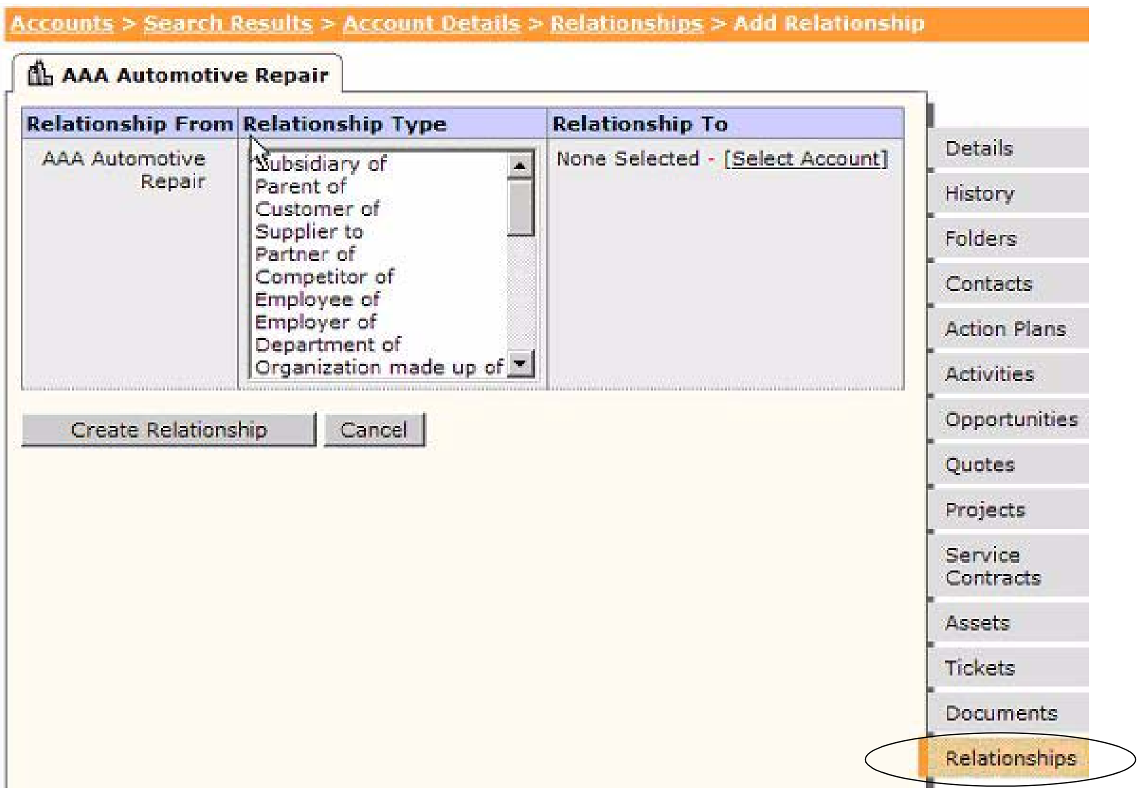


Figure 6.51 Relationships Sub-Tab

This feature enables you to trace one account's relationship with another via pre-defined parameters. Over a period of time, a business acquires customers who become frequent customers. Your business may offer some preferential treatment to such customers by using this feature. This feature will help you track a preferred account and its bearing on your other accounts.

6.17 Relationships

Clicking the **Relationships** sub-tab on the Account Details page displays the **Relationships** page. To create a relationship between different accounts, click the **Add a Relationship**. Select from the options the one that best describes the relationship between the accounts, as shown in Figure 6.51. Click **Create Relationship** to **Save** or **Cancel** to go back to the previous page.

The following information about the parent company of an account is displayed:

- Its competition, if any
- The kind of business it is in
- Its affiliations
- The account that is backing it financially

- Whether it is influenced by another account

CHAPTER
7

Managing Products

This chapter provides information about the **Products** module of Centric CRM. This module enables you to store information about products for future reference. This information includes product names, categories to which products belong, and product prices. Centric CRM provides a web-based interface to configure and manage your company's product catalog.

This chapter consists the following sections:

- **Section 7.1, "How Does this Module Help You?"**
- **Section 7.2, "Accessing the Products Module"**
- **Section 7.3, "Adding a Category"**
- **Section 7.4, "Adding a Product"**
- **Section 7.5, "Importing Products"**

7.1 How Does this Module Help You?

This module helps you to efficiently manage product-related information for your company. The **Products** module helps you manage the following tasks:

- Categorizing Products
- Adding New Products
- Managing Pricing Details
- Importing Products

7.2 Accessing the Products Module

To access the **Products** module click the **Products** tab, as shown in **Figure 7.1**.

Figure 7.1 Accessing the Products Module

By default, the **Products Editor** page is displayed, as shown in **Figure 7.2**.

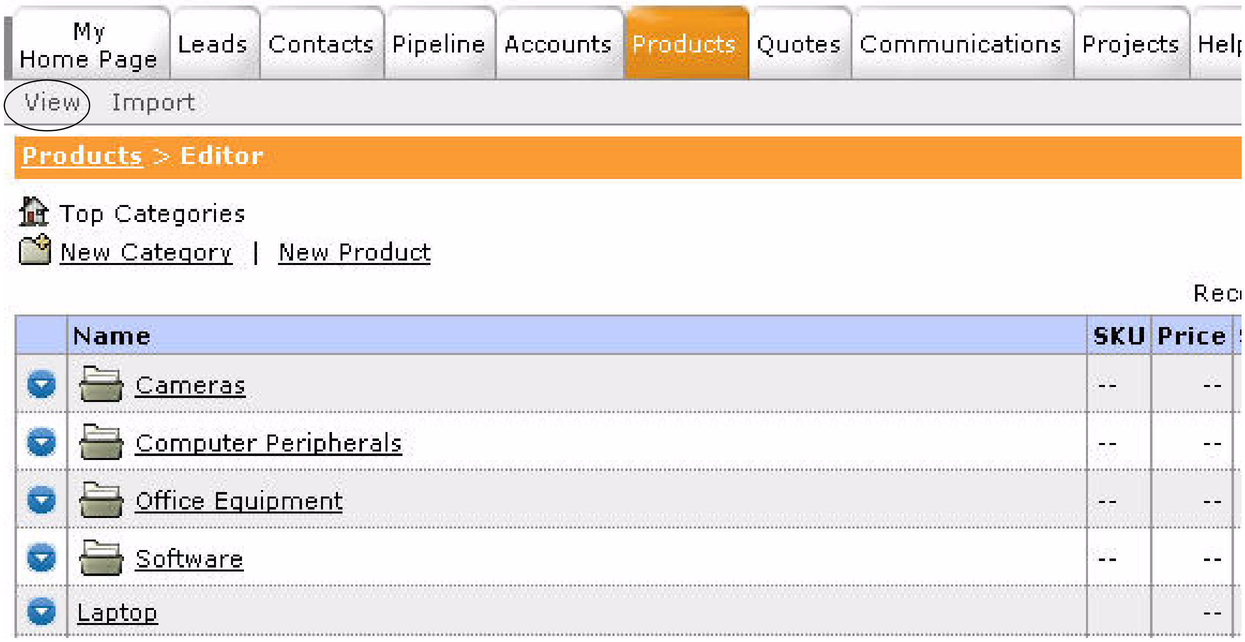


Figure 7.2 Products Editor Page

The **Products Editor** page can also be accessed by clicking the **View** link located on the menu bar, as shown in Figure 7.2.

This page displays a list of categories and products of your company. Similar products have been grouped together into categories, such as Cameras, Computer peripherals, Office Equipment and Software, as shown in Figure 7.2. Other uncategorized products are also displayed, such as Laptop.

For each product, you can view the following details:

- Price
- Start Date
- Expiration Date
- Availability

When you click the action icon beside a category name, a context menu with the options to delete, rename or move the category is displayed, as shown in Figure 7.3.

When you click the action icon beside a product name, a context menu with the following options is displayed, as shown in Figure 7.3:

- View the product - view product details
- Modify the product - modify the product details
- Clone the product - copy common details of the product to create a new product
- Delete the product - delete the product
- Manage category associations - For more information on this option, refer to **"Managing Category Association"**.

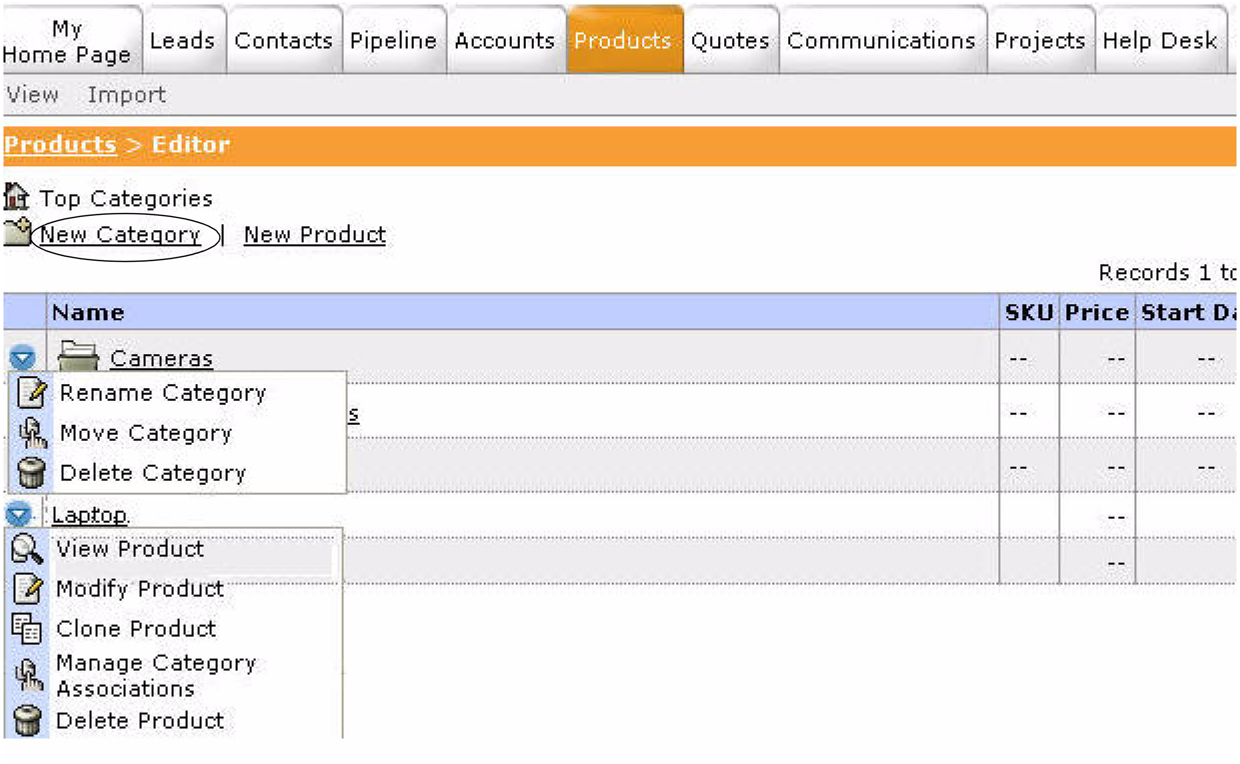


Figure 7.3 **Context Menus in the Product Catalog Editor Page**

7.3 Adding a Category

You can manage product classification by grouping similar products and assigning them to a category.

To create a new category, follow the steps listed below:

1. Select **New Category**, as shown in **Figure 7.3**.

   An **Add Category** page is displayed, as shown in **Figure 7.4**.

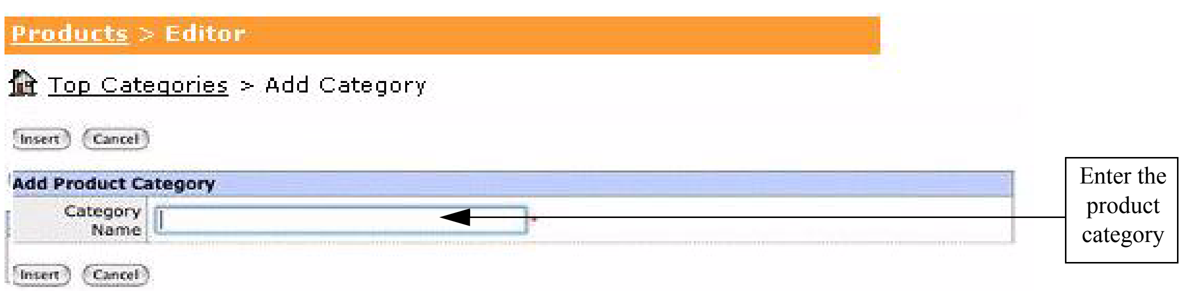


Figure 7.4 **Adding a New Category**

2. Enter the **Category Name** and click **Insert**, as shown in **Figure 7.4**.

The **Products Editor** page showing the name of the created category is displayed, as shown in **Figure 7.5**.

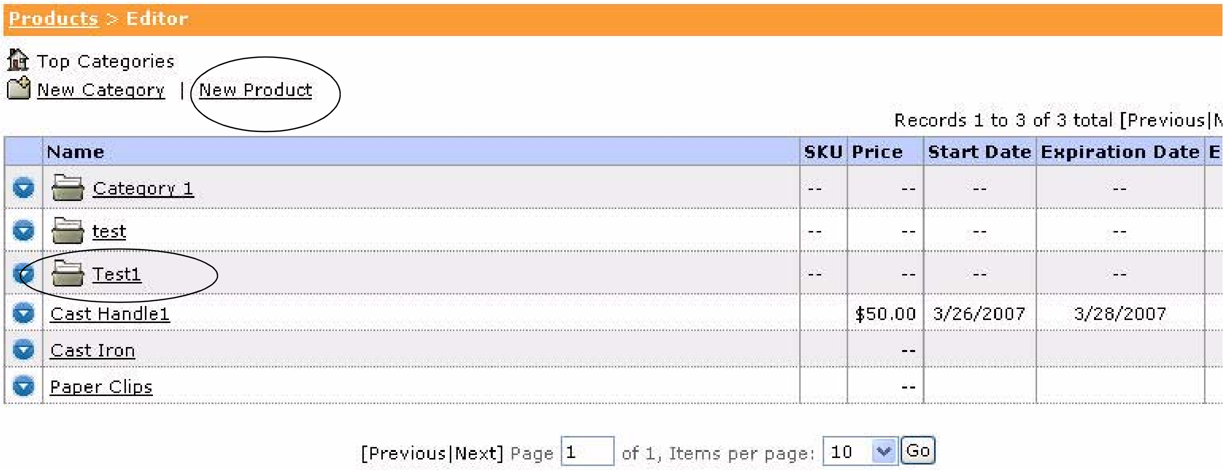


Figure 7.5 Viewing the Created Category

You can view details of your top-selling products, which can be grouped under **Top Categories**.

7.4 Adding a Product

Centric CRM provides an option to add new products using the **New Product** option in the **Products** module.

You can add a new product in two ways:

- Select a category and add a product within this category
- Add a stand-alone product

To select a category and add a product, follow the steps listed below:

1. Select the category name, as shown in **Figure 7.5**.

   The **Products Editor** page for the selected category is displayed, as shown in **Figure 7.6**.

Figure 7.6 Adding a Product Within a Category

.

Note: To create a stand alone product, click **New Product**, as shown in **Figure 7.5**.

2. Click **New Product**, as shown in **Figure 7.6**.

   The **Add Product** page is displayed, as shown in **Figure 7.7**.

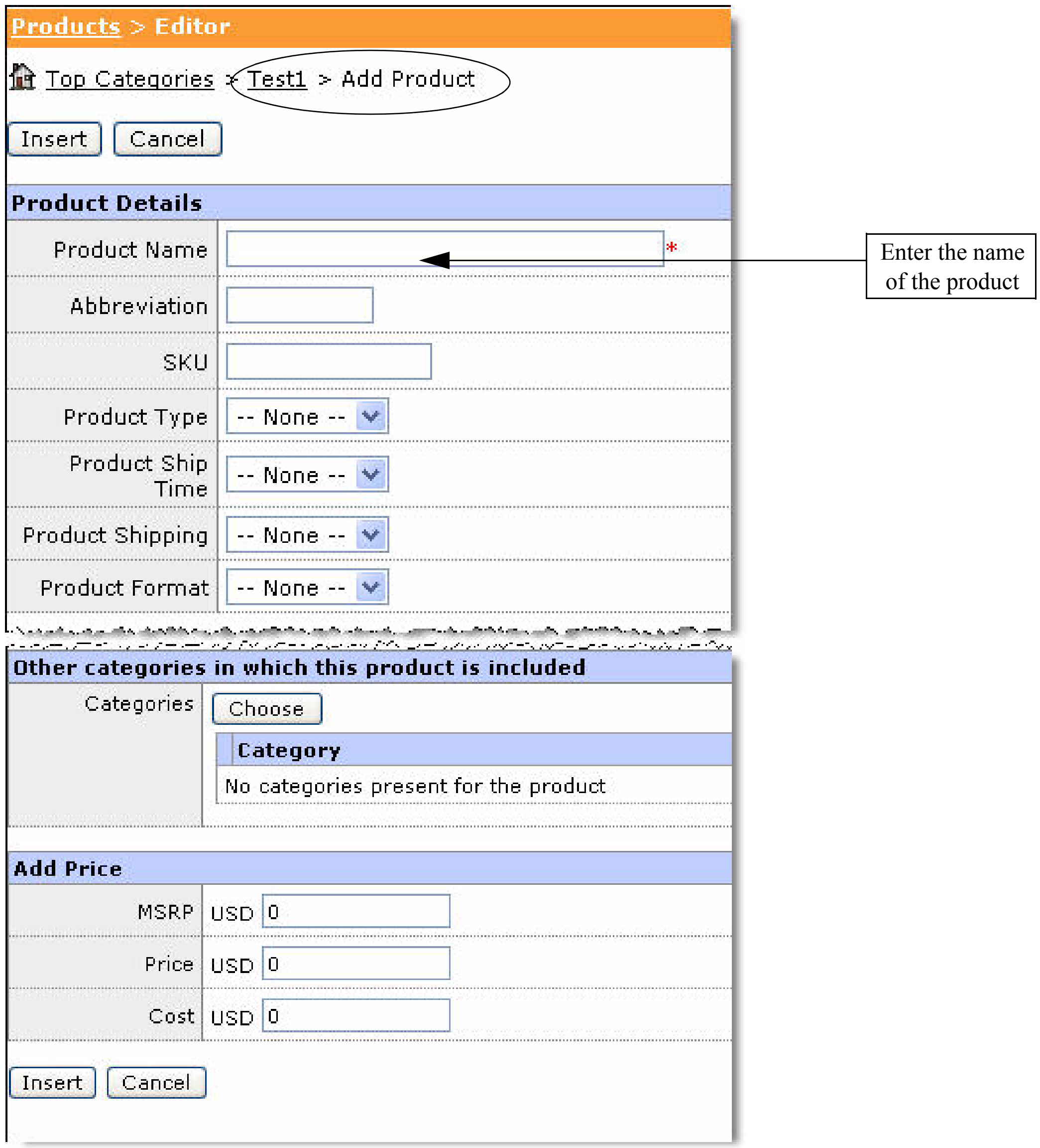


Figure 7.7 Adding a New Product

3. Enter the product related details and click **Insert**.

   You can enter the following information:

   - Product Name
   - Abbreviation
   - SKU
   - Product Type
   - Product Ship Time - time taken to ship the product
   - Product Shipping

- Product Format
- Start and expiration dates related to the availability of the product
- Description
- Categories
- Price

Entering all possible information helps you track products. If the number of Stock Keeping Units (SKUs) is large, tracking products with wrong or incomplete product details will be time-consuming.

The **Product Details** page is displayed, as shown in **Figure 7.8**.

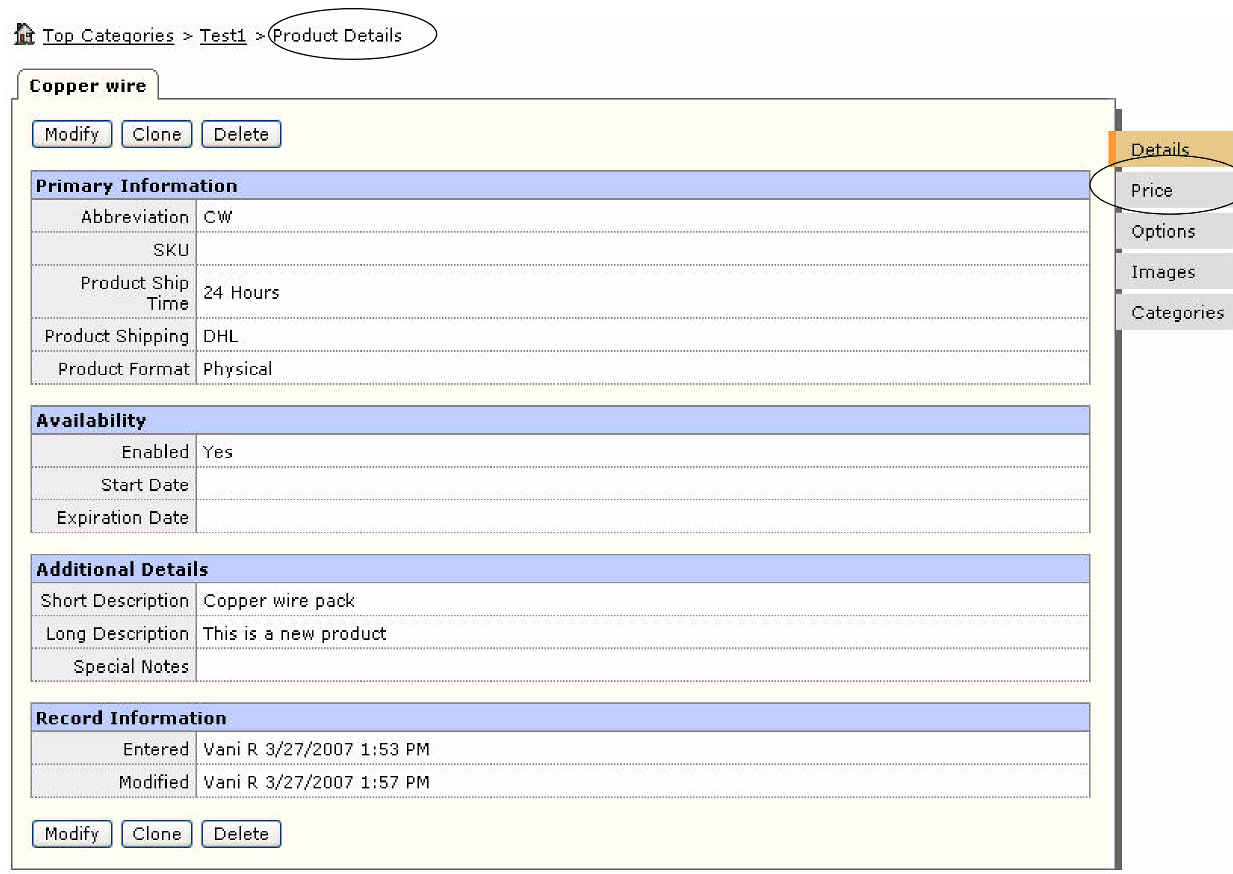


Figure 7.8 Viewing the Product Details

The **Product Details** page enables you to perform the following tasks:

- Modify the product details - using the **Modify** option
- Duplicate the product details - using the **Clone** option
- Delete the product details - using the **Delete** option

7.4.1 Providing Pricing Details

The price of a product does not remain constant, and is completely dependent on the following factors:

- Cost of raw material
- Labor
- Economy

Inflation leads to a hike in the price. Slow sales make it necessary to cut the price of the product.

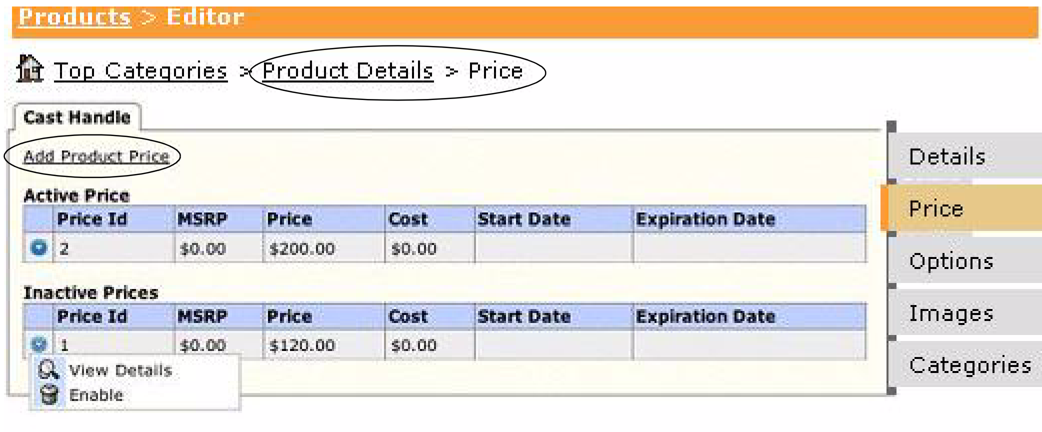


Figure 7.9 Accessing Product Price

Click the **Price** sub-tab on the **Product Details** page, as shown in **Figure 7.8**. The **Price** page with product price information is displayed, as shown in **Figure 7.9**.

You can specify the pricing details by following the steps listed below:

1. Click the **Add Product Price link,** as shown in **Figure 7.9.**

   The **Add Price** page is displayed, as shown in **Figure 7.10**.

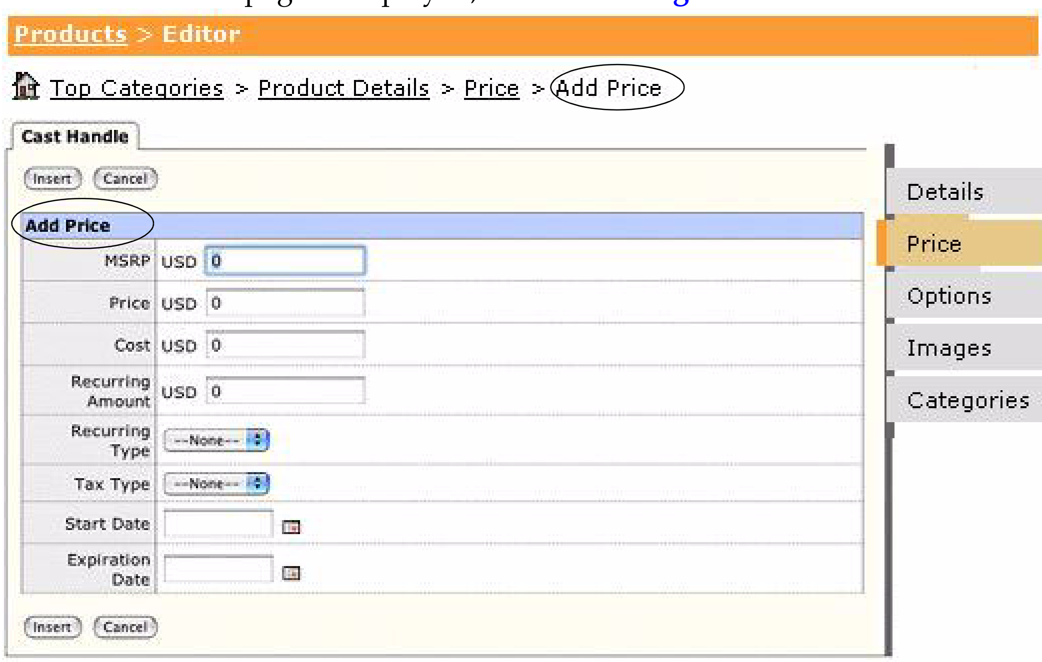


Figure 7.10 Adding Pricing Details

2. Enter all the pricing details for the product and click **Insert**.

   The **Price Page** is displayed, as shown in **Figure 7.9**.

You can fix multiple prices for a given product. Among these, one is fixed as the active price. This is the current price at which the product is sold. The remaining are inactive prices which are used for reference. A product can have an active price and one or more inactive prices.

You can set an inactive price as the active price, if required. For example, if there is a marked increase in demand for a product, you can activate an inactive higher price and disable the lower but currently active price.

To disable an active price and enable an inactive price follow the steps listed below:

1. Click the action icon, and select **Disable** from the context menu to deactivate the active price, as shown in **Figure 7.11**.

   The disabled price will be set as an inactive price, as shown in **Figure 7.12**.

Figure 7.11 Deactivating the Active Price

2. Click the action icon for the inactive price that you wish to activate, and select **Enable** from the context menu to set the inactive price as the active price, as shown in **Figure 7.12**.

The inactive price will be set as an active price.

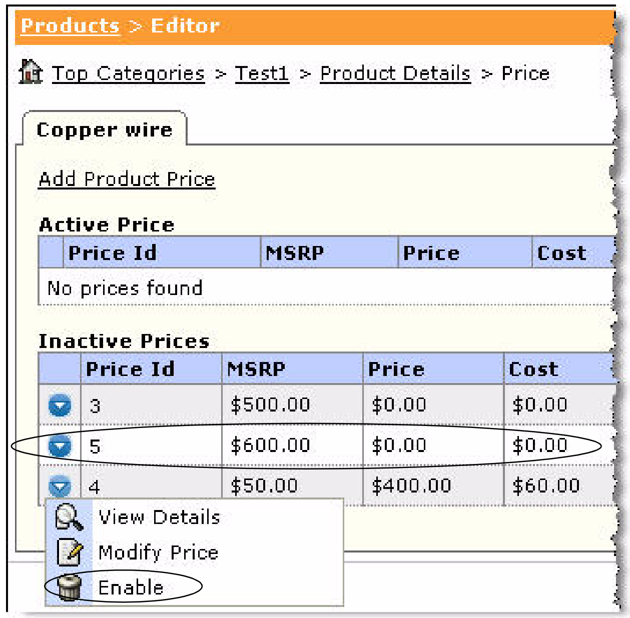
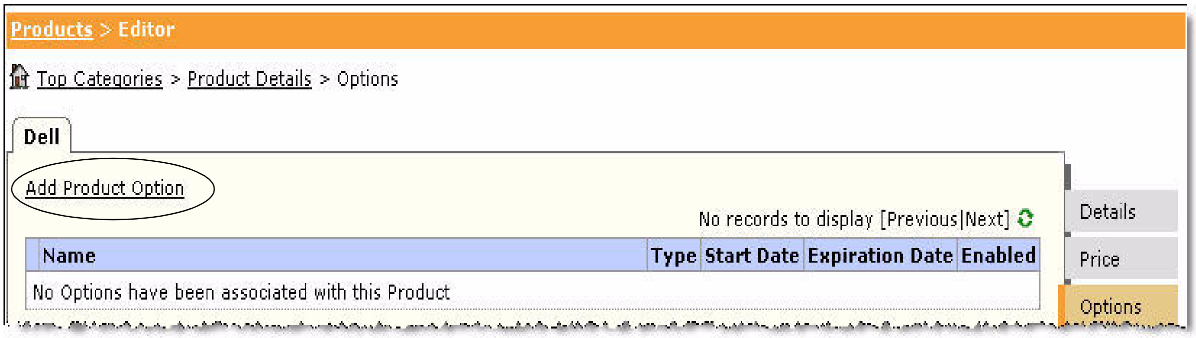


Figure 7.12 Activating an Inactive Price

7.4.2 Specifying Product Options

Centric CRM enables you to define extra options for your products. For example let's say you sell computer hardware, and are defining the pricing for a particular laptop model. You will generally have a base configuration and price for this model of laptop, while customers can choose additional features, or upgraded specifications, at an extra price per feature. Your default configuration may be 1 GB of RAM on the laptop, but the customer can purchase the laptop with 2 GB of RAM, for an additional price. Another example is when the manufacturer normally offers a year's warranty on the laptop, but allows the warranty to be extended to 2 or 3 years, for an additional payment at the time of purchase. Centric CRM provides you with different types of fields which you can use to define the options available with a given product. All of these result in an addition to the base price, of a value that you define, but they behave differently. The field types available are text, checkbox, number and lookup list. Addition of options using each of these



field types is described below.

Figure 7.13 Viewing the Options Page

7.4.2.1 Accessing the Options Page

Selecting the **Options** sub-tab on the **Product Details** page displays the **Options** page, as shown in **Figure 7.13**. Selecting the **Add Product Option** link displays the **Add Option** page, as shown in **Figure 7.14**.

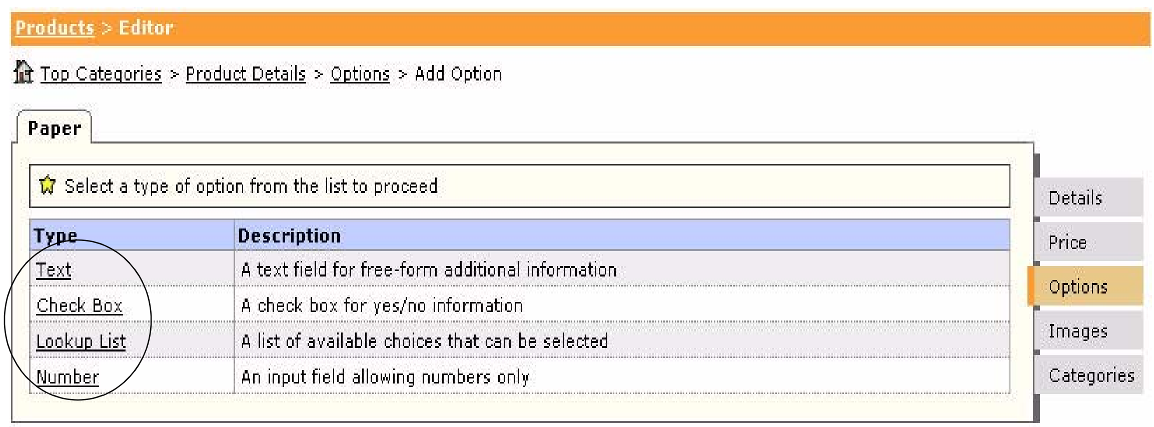


Figure 7.14 Choosing a Field Type for the New Option

The field types available for creating a new option, as shown in **Figure 7.14**, are listed below:

- **Text**. This field type enables you to add a text option.

  End-users can enter text in this field
- **Check Box.** This field type enables you to add a check box option.

  End-users can check the check box to select Yes, or leave it blank for No.
- **Lookup Lists**. This field type enables you to add a lookup list option.

  End-users can select a specific option from the list.
- **Number**. This field type enables you to add a number option.

  End-users can enter a numeric value in this field.

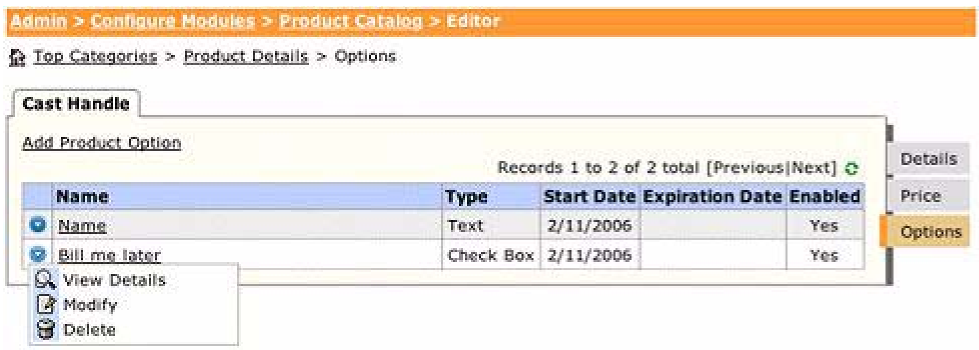


Figure 7.15 **Product Options**

For an existing product option, you can perform the following tasks:

- View option details
- Modify option details
- Delete an option

Click the option named **Name** and the option's properties are displayed, as shown in **Figure 7.16**. In this example, the field type of the option is text.

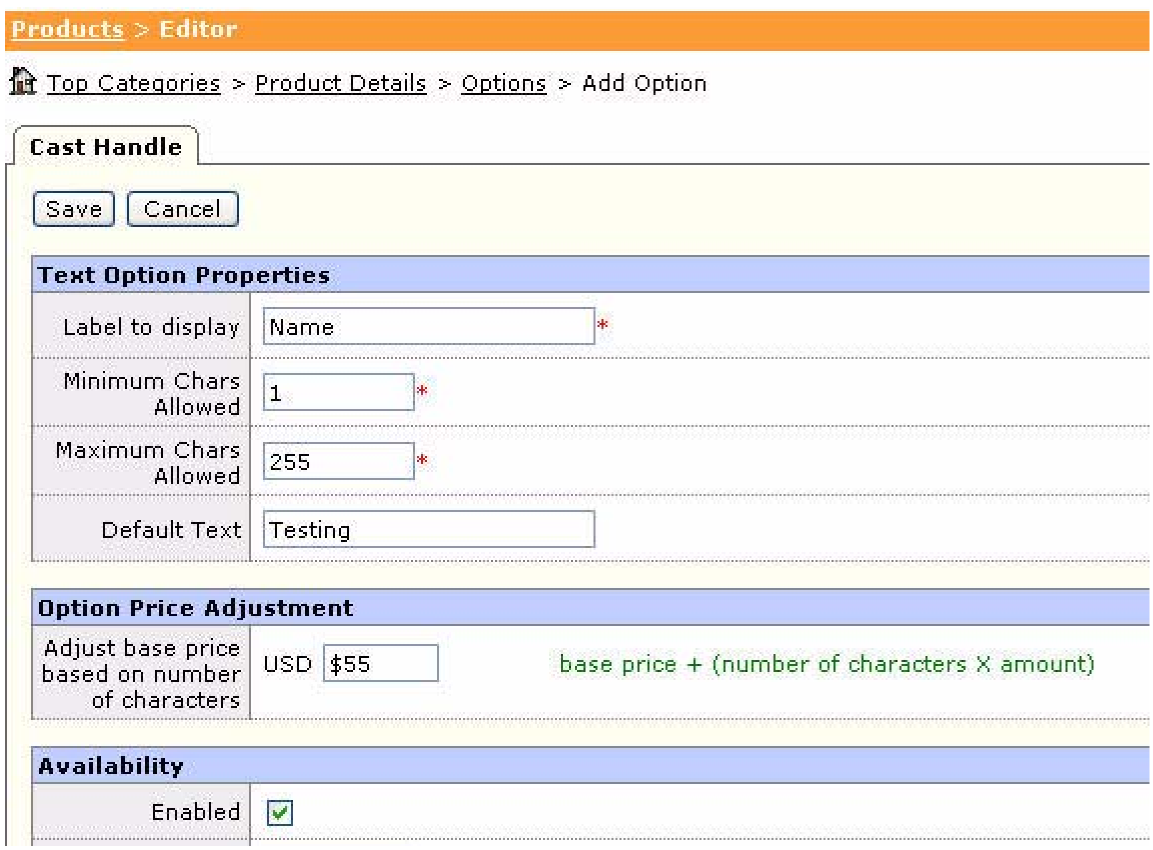


Figure 7.16 **Option Details**

Options have prices associated with them. The option price is generally determined by a specific formula that is specified by the option's configuration. Options also have start and end dates, and can be enabled or disabled.

7.4.2.2 Adding a Text Option

The **Text** option configurator enables you to add options with text characteristics. To add a product option of the text type follow the steps listed below:

1. Click the **Text** link, as shown in Figure 7.17.

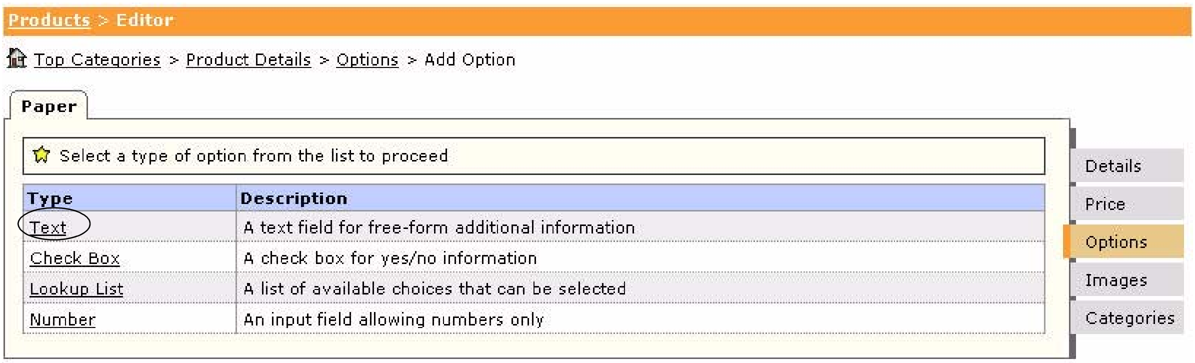


Figure 7.17 Selecting the Text Type of Options

The **Add Option** page is displayed, as shown in Figure 7.18.

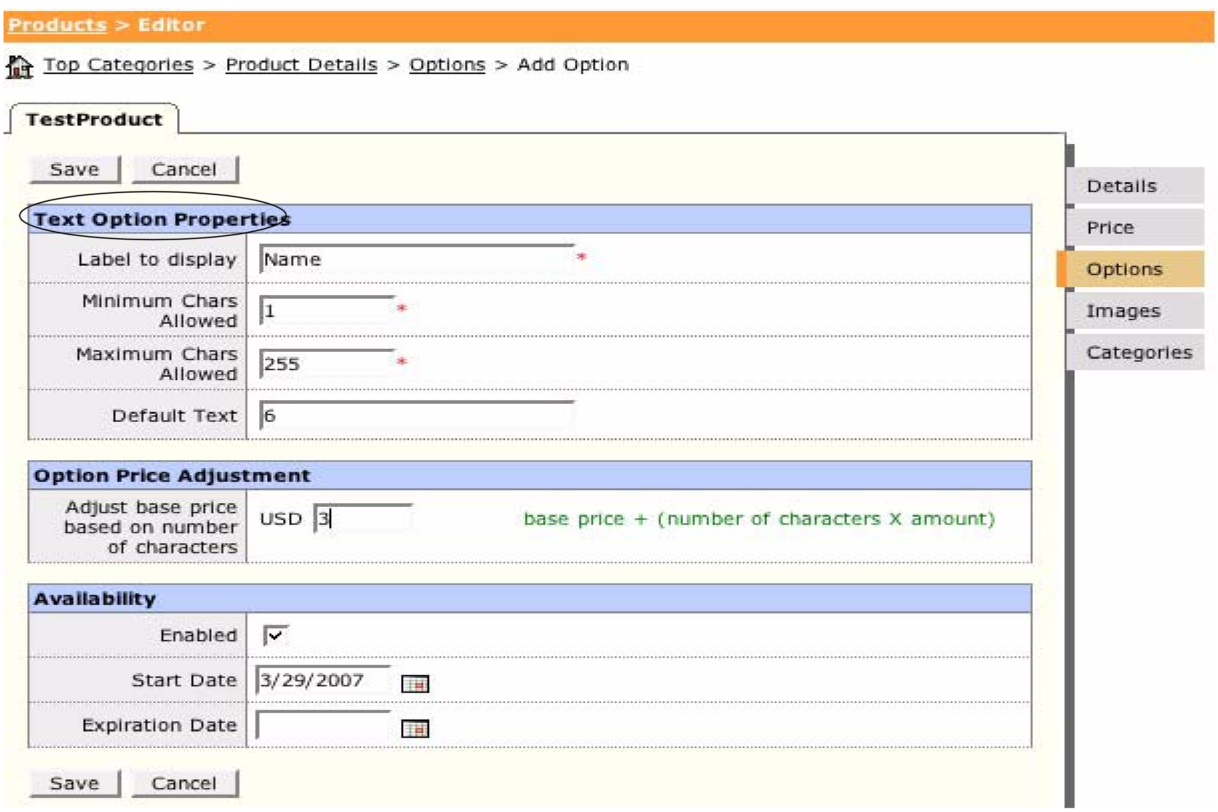


Figure 7.18 Adding Text Option Configurators

2. Enter the following details:
   - **Label to display** - as it will appear to end-users.
   - **Minimum Chars Allowed** - which specifies the minimum number of characters end-users need to enter in the text box.
   - **Maximum Chars Allowed** - which specifies the maximum number of characters end-users can enter in the text box.
   - **Default Text** - which specifies the default contents of the text box
   - Start and Expiration date

Note: The final product's price based on what you enter is determined by the formula:

Product Price = Product Base Price + (Number of characters the user enters X option's price adjustment amount)

---

3. Click **Save**.

   The **Option Details** page showing the created text option is displayed, as shown in **Figure 7.19**. This page also provides options to modify or delete the option.

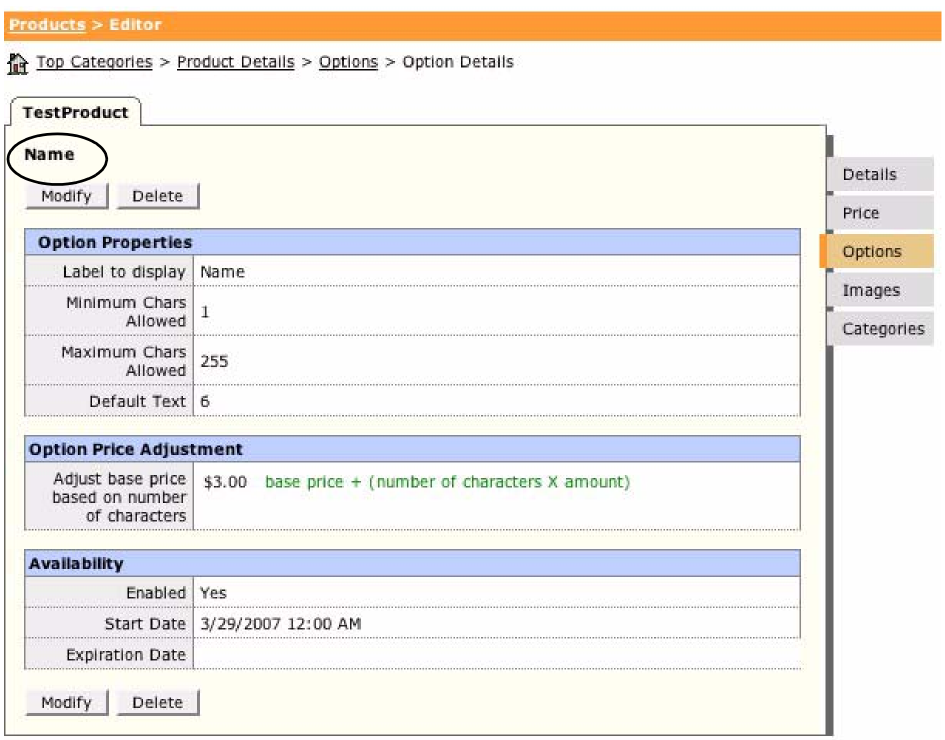


Figure 7.19 Viewing the Option Details page

7.4.2.3 Adding a Check Box Option

The **Check Box** option configurator enables you to add options with the checkbox characteristics. This type of option could be used for optional add-on components for a product. Continuing with the earlier example of the laptop, suppose that the base configuration for the laptop does not include an external mouse, which many people prefer to use, rather than the touch pad on the laptop. You could define a check box type option for a standard USB mouse which you sell, which will work with this laptop. While an order is being placed, if the customer requests the mouse option, the salesperson just has to check this check box to add the cost of the mouse to the base price of the laptop.

To add a product option of type check box follow the steps listed below:

1. Click the **Check Box** link, as shown in **Figure 7.14**.

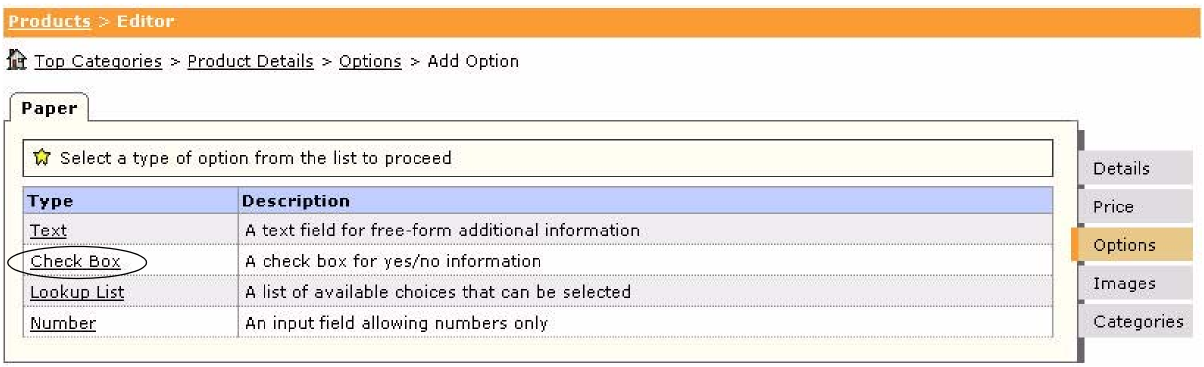


Figure 7.20 Selecting the Check Box Option

The **Add Option** page is displayed, as shown in **Figure 7.21**.

Figure 7.21 Adding a Check Box Configurator

2. Enter the following details:

- **Label to display** - which specifies the label of the check box.
- Start and Expiration date - which specifies the start and end dates.

Note: The final product's price based on what you enter is determined by the formula:

Product Price = Product Base Price + check box option's price adjustment amount

---

3. Click **Save**.

   The **Option Details** page showing the created check box option is displayed, as shown in Figure 7.22. This page also provides options to modify or delete the option.

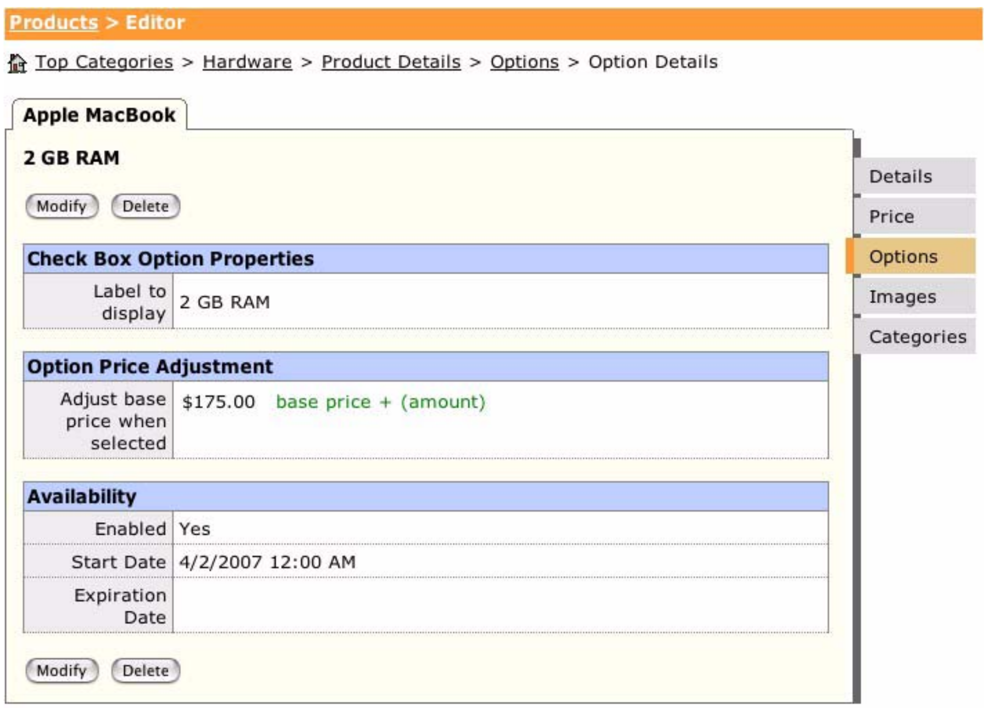


Figure 7.22 Viewing the Option Details Page of Check Box Option Type

7.4.2.4 Adding a Lookup List Configurator

The **Lookup List** option configurator enables you to add options that have a list of items out of which one may be chosen. Each item has a different price associated with it. Suppose you offer additional RAM pre-installed on the laptop we have been using as an example so far. You have three choices available to the customer: 1GB, 2GB or 3 GB extra (The laptop comes with 1GB of RAM in its base configuration, and the maximum memory it can take is 4 GB). You can create a lookup list type of option for this scenario, listing the three RAM sizes, and the corresponding prices.

To add an option of this type follow the steps listed below:

1. Click the **Lookup List** link, as shown in Figure 7.23.

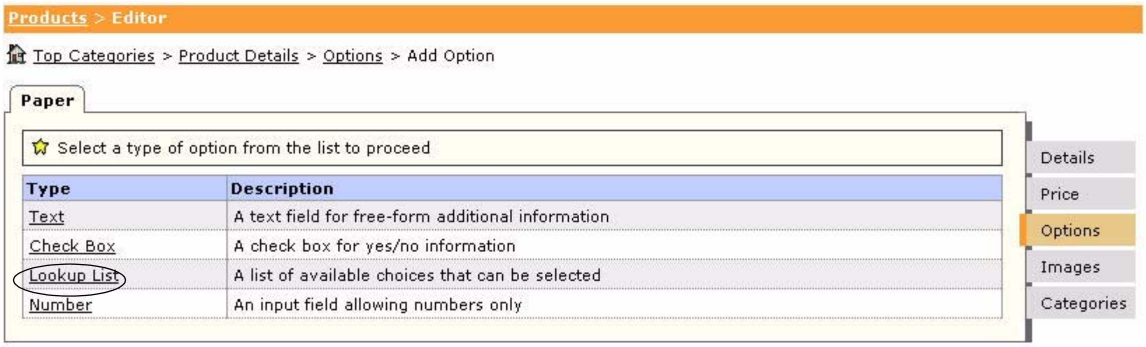


Figure 7.23 Selecting the Lookup List Option

The **Add Option** page is displayed, as shown in Figure 7.24.

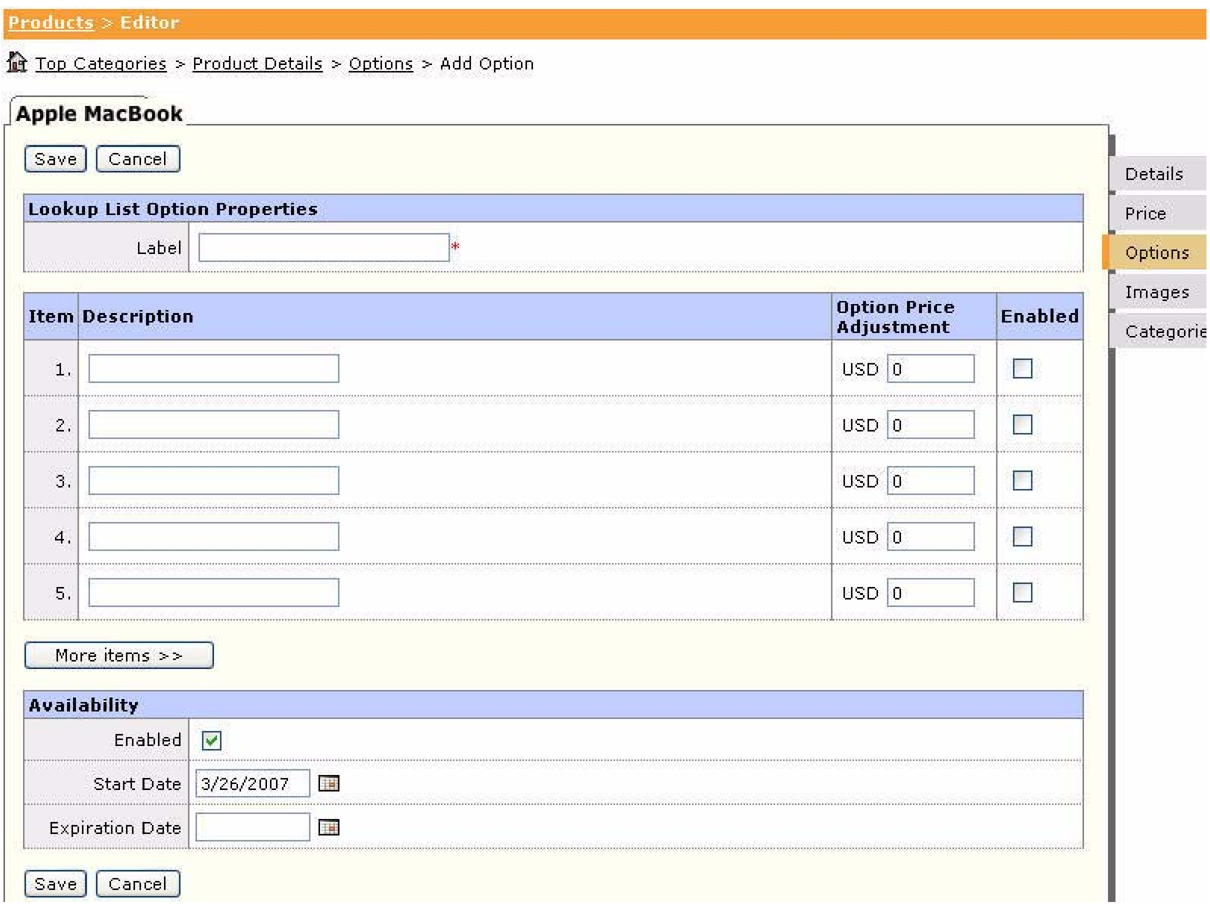


Figure 7.24 Adding a Lookup List Option

2. Enter the following details:
   - **Label to display** - which displays the label for the lookup list.

- **Lookup List Items** - the items that will appear in the list, and the additional price associated with each item.

If you need to add more than five items, click **More Items** to display five more list items. You can add any number of items for display.

Note: The final product's price is determined by the formula:

Product Price = Product Base Price + selection's price adjustment amount

---

3. Click **Save**.

   The **Option Details** page showing the created lookup list option is displayed, as shown in Figure 7.25. This page also provides options to modify or delete the option.

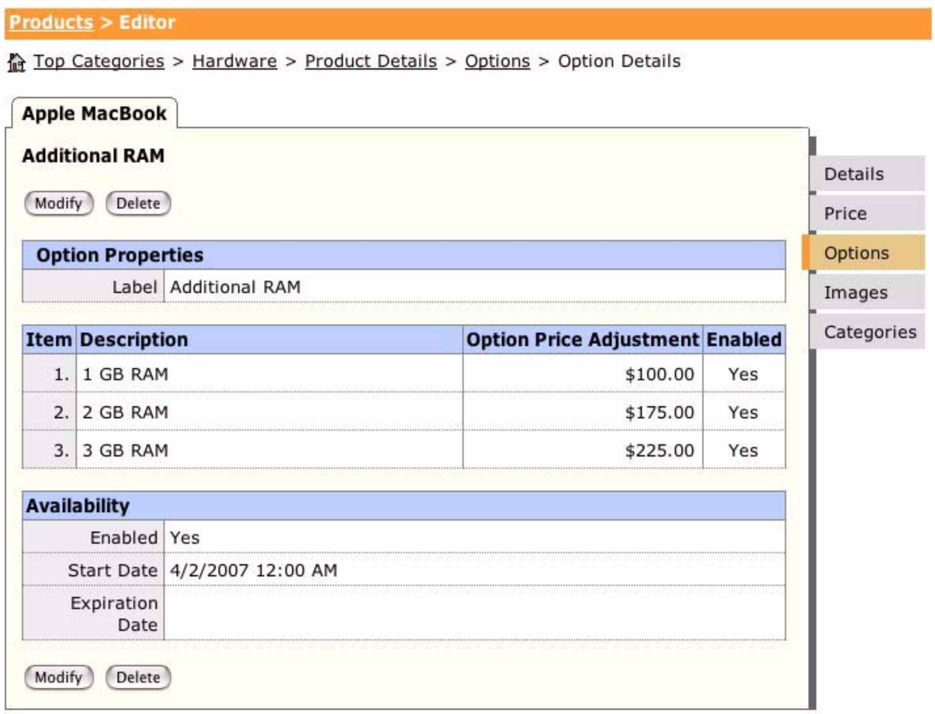


Figure 7.25 Viewing Lookup List Type of Option

7.4.2.5 Adding Number Type Configurator

The **Number** option configurator enables you to add numerical value options. For example, suppose the laptop you're selling has one year warranty in its base configuration, but the customer can purchase additional warranty years at a fixed amount per year, up to a maximum of five years. In such a case, you could create a number option with a minimum value of zero and a maximum value of five, and assign an amount for each year of additional warranty. When taking an order, a salesperson simply enters zero or more for this option, and the corresponding extra price is added to the price of the laptop.

To add an option of this type, follow the steps listed below:

1. Click the **Number** link, as shown in **Figure 7.14**.

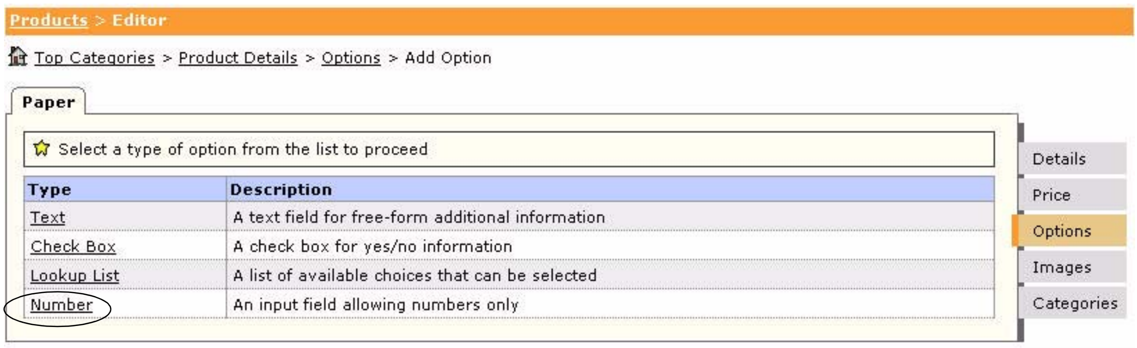


Figure 7.26 Selecting the Number Option

The **Add Option** page is displayed, as shown in **Figure 7.27**.

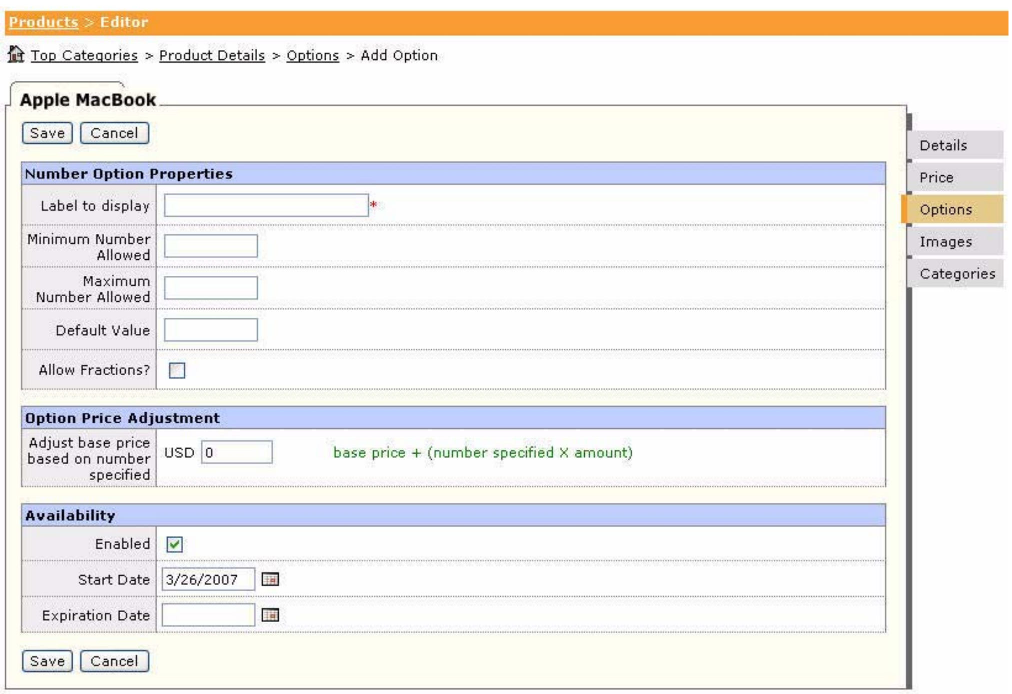


Figure 7.27 Adding a Number Option Configurator

2. Enter the following details:

- **Minimum number Allowed** - which specifies the minimum number the end-user can enter in the text box
- **Maximum number Allowed** - which specifies the maximum number the end-user can enter in the text box
- **Default Value** - which displays the default value displayed in the text box for this option

- **Allow Fractions** - which specifies that you can enter fractional values with a decimal.

Note: The final product's price based on what you have enter is determined by the formula:

Product Price = Product Base Price + (number specified X price adjustment amount)

---

3. Click **Save**.

   The **Option Details** page showing the number type option is displayed, as shown in Figure 7.28. This page also provides options to modify or delete the option.

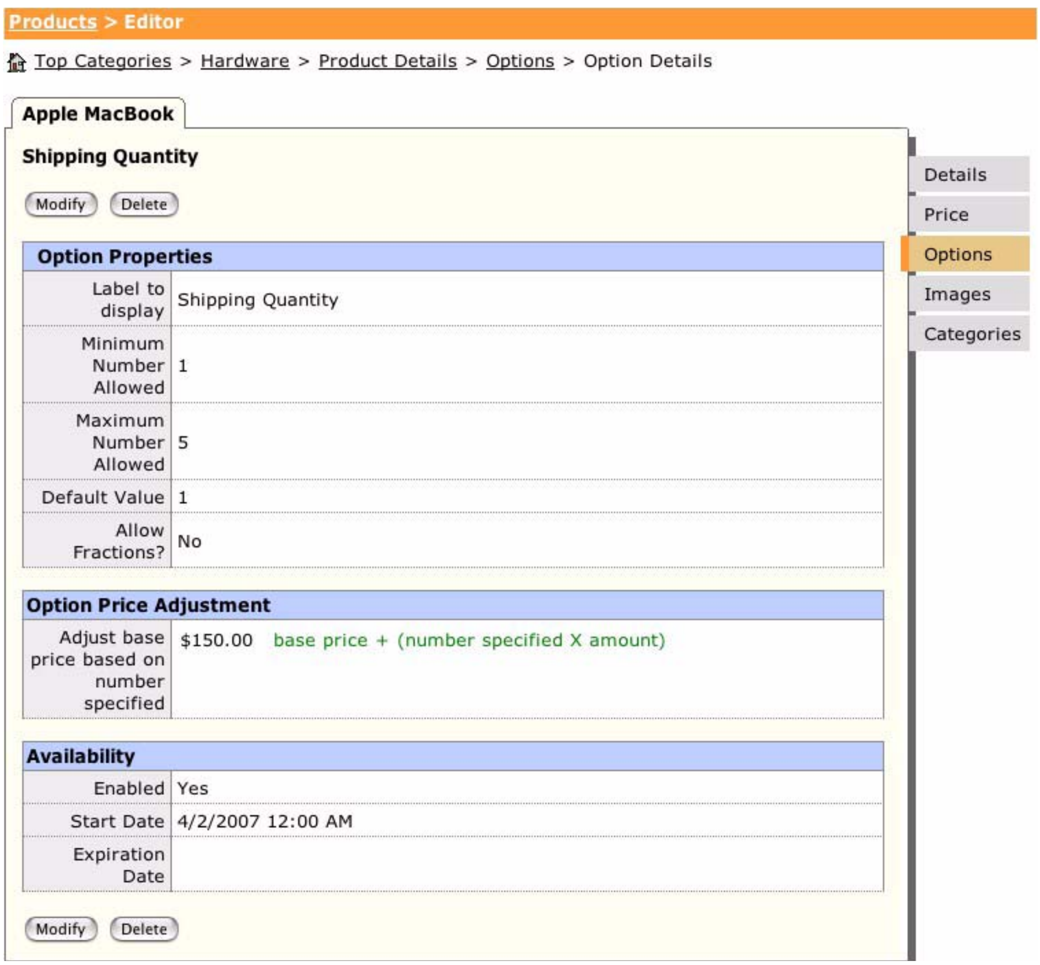


Figure 7.28 **Viewing Option Details of Number Type**

7.4.3 Adding Product Images

Centric CRM provides an option to upload images related to the product. You can upload the **Thumbnail Image, Small Image,** and **Large Image** for the product.

To upload images, follow the steps listed below:

1. Click the **Images** sub-tab on the **Product Details** page, as shown in **Figure 7.29**.

   The **Images** page is displayed, as shown in **Figure 7.30**.

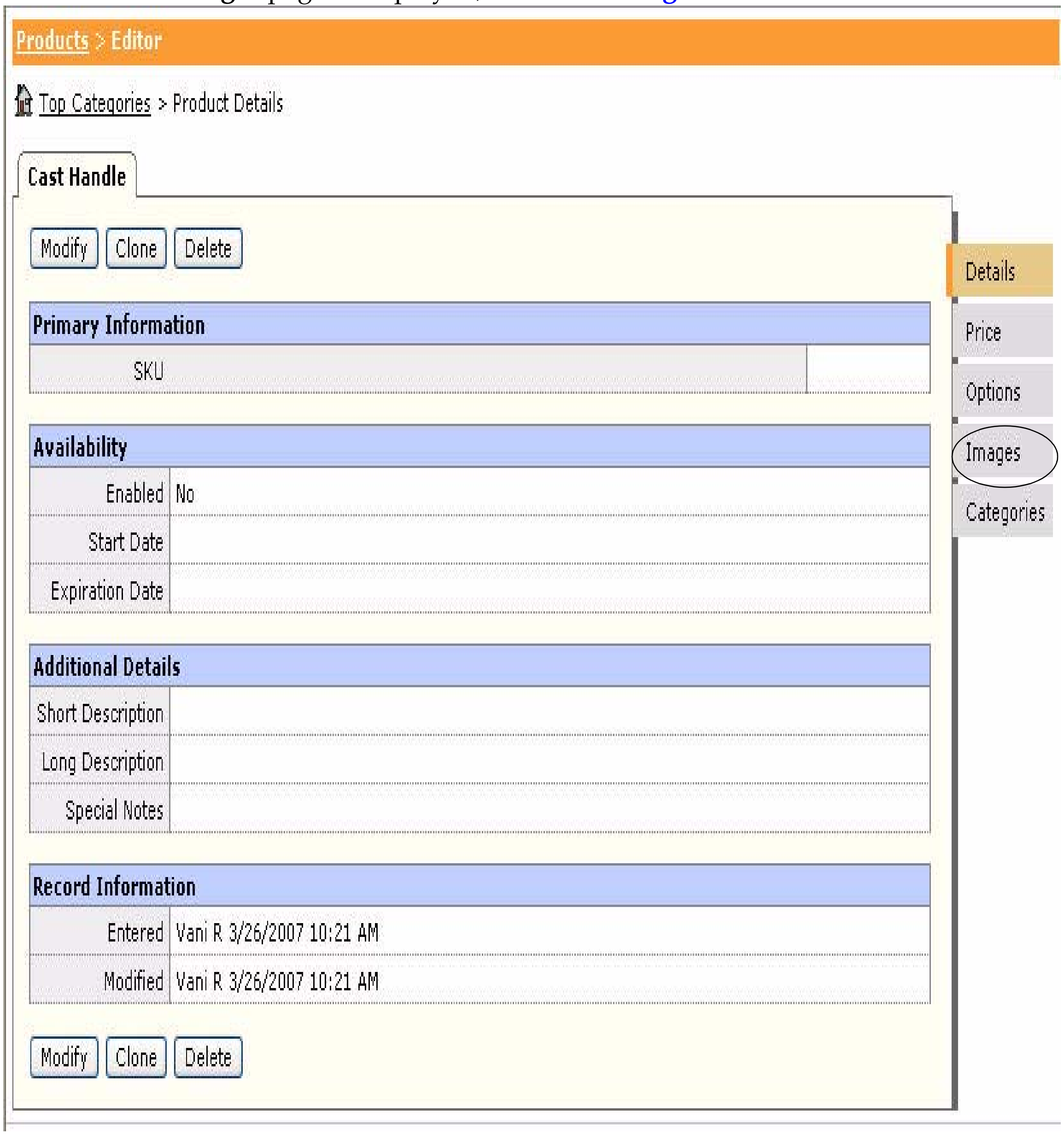


Figure 7.29 Selecting the Images Option

2. To upload a thumbnail image, click the **Upload** link, as shown in **Figure 7.30**.

The page to upload images is displayed, as shown in **Figure 7.31**

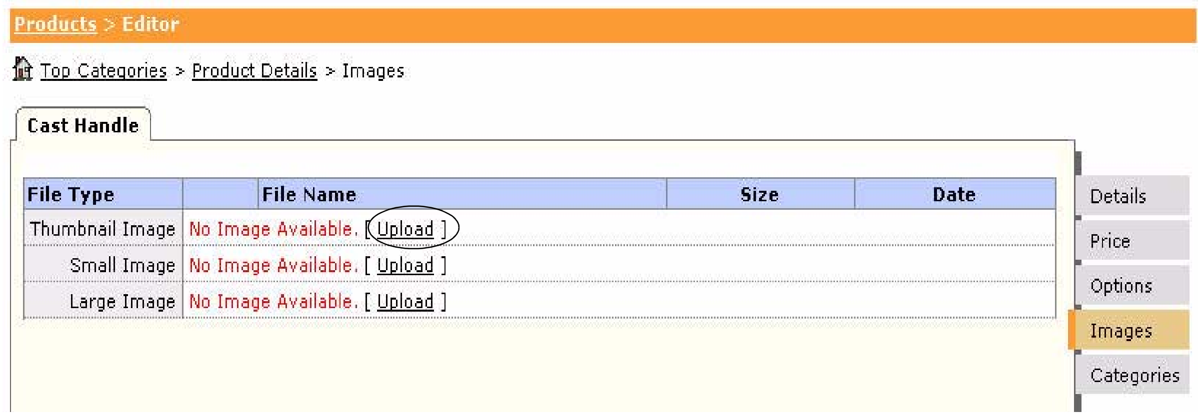


Figure 7.30 Viewing the Images page

3. Click **Browse**, as shown in **Figure 7.31**. Select the image to be uploaded, and click **Open**. The name of the selected image will appear in the text box beside **Browse**. Click **Upload File**, as shown in **Figure 7.32**.

   The details of the uploaded image are displayed, as shown **Figure 7.33**.

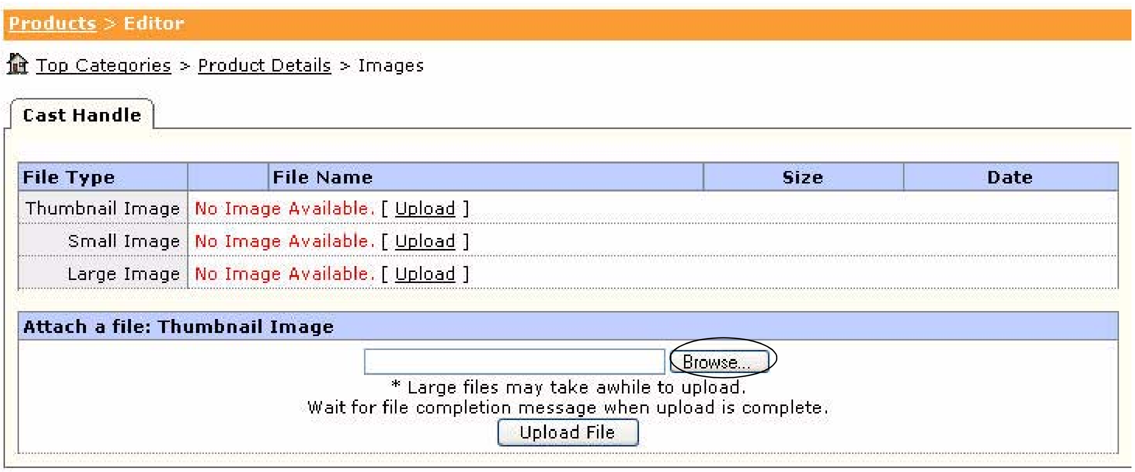


Figure 7.31 Selecting an Image to Upload

.

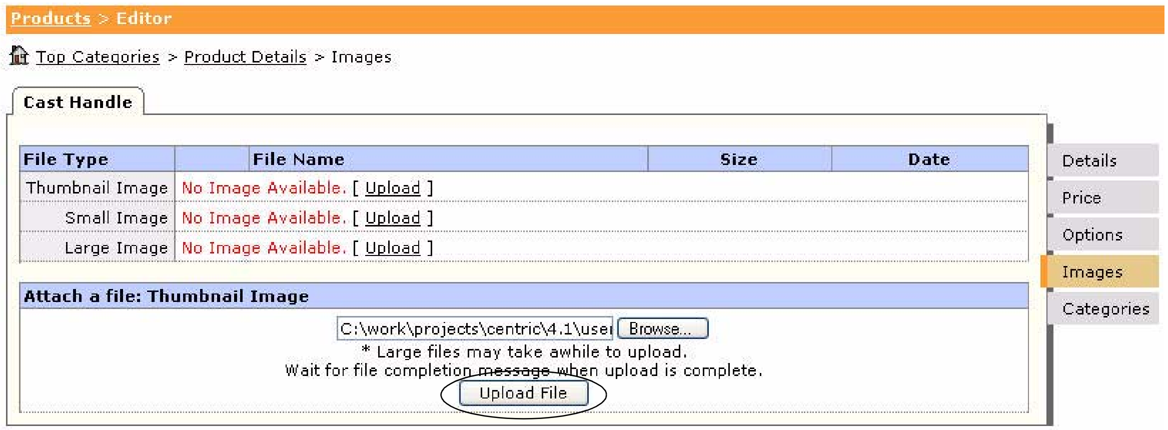


Figure 7.32 Uploading an Image

You can also upload small and large images by following the same method.

.

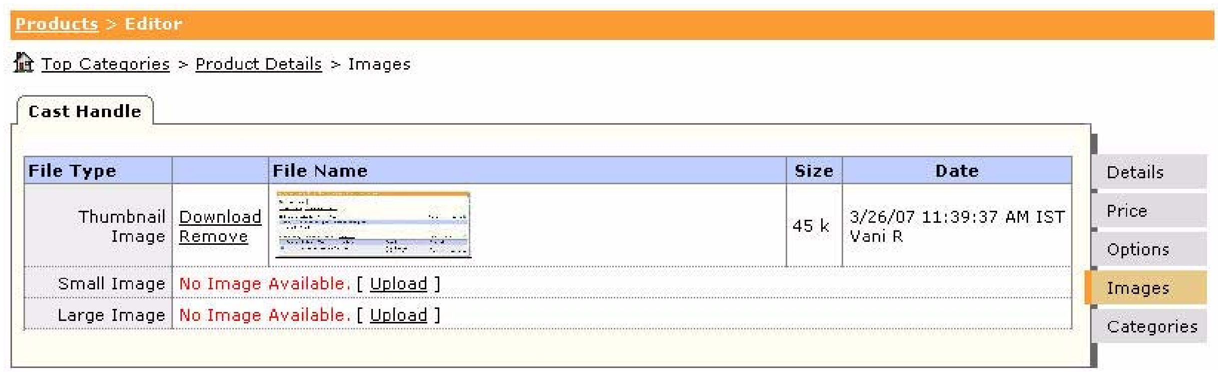


Figure 7.33 Viewing the Image Details

7.4.4 Managing Category Association

You can use the **Categories** sub-tab to re-categorize products after having entered them into the products catalog. Clicking the **Categories** sub-tab on the **Product Details** page displays the **Categories** page, as shown in Figure 7.34.

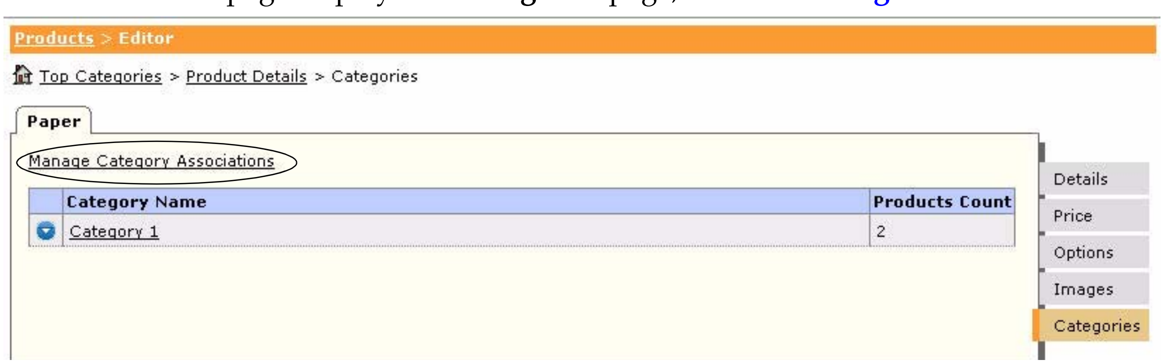


Figure 7.34 Categorizing Products

This page enables you to manage category associations.

To assign a category to a product follow the steps listed below:

1. Click the link **Manage Category Association**. A pop-up window is displayed, as shown in **Figure 7.35**.

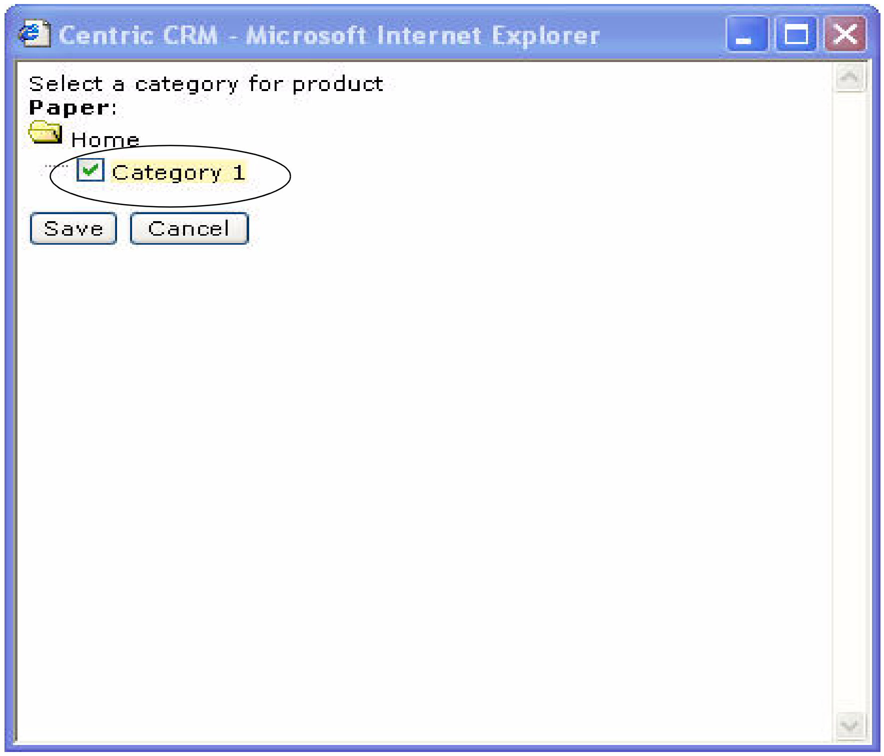


Figure 7.35 Selecting the Category

2. Assign a category to the product, as shown in **Figure 7.35** and click **Save**.

   The **Categories** page with the assigned category is displayed, as shown in **Figure 7.36**.

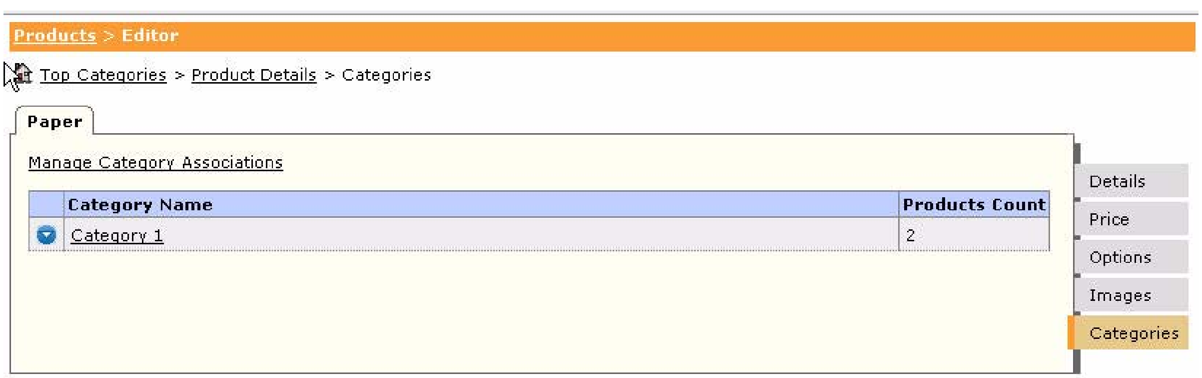


Figure 7.36 Viewing the Categories Page

7.5 Importing Products

Centric CRM provides an option to import products along with associated product images. To import products, you need to initially create a file with the relevant details, in a **Comma Separated Value** (.csv) format. However, to import images, you need to compress the images in a .zip file.

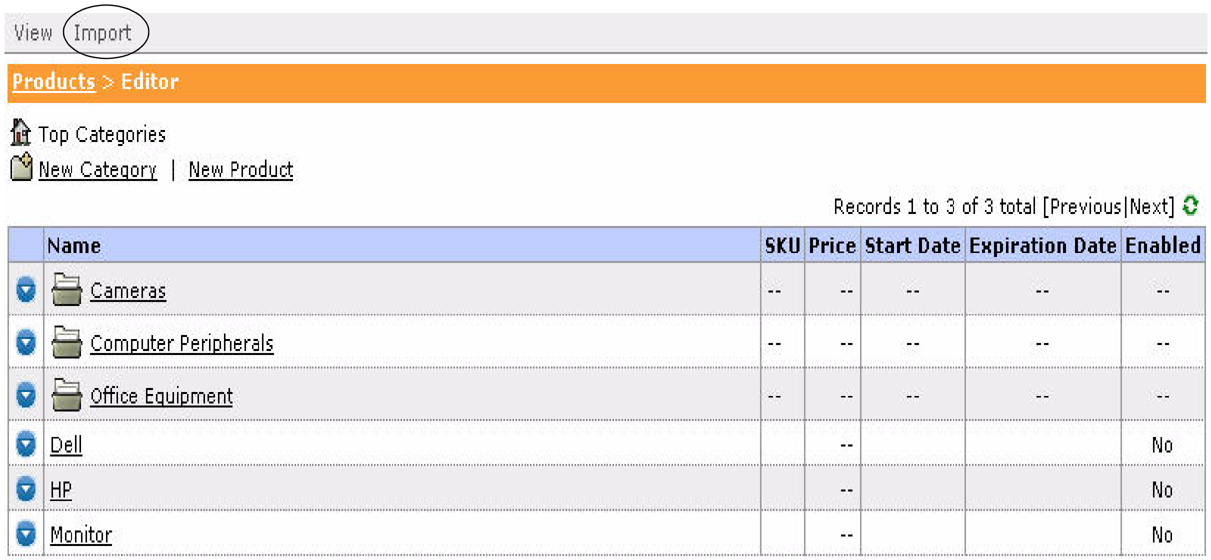


Figure 7.37 Accessing the Import Option

Note: While creating the.csv file please ensure that the category field specified in the file is a pre-existing category in your CRM application.

To import the product details and the product images follow the steps listed below:

1. Click **Import** on the module's menu bar, as shown in **Figure 7.37**.

   The **View Imports** page is displayed, as shown in **Figure 7.38**.

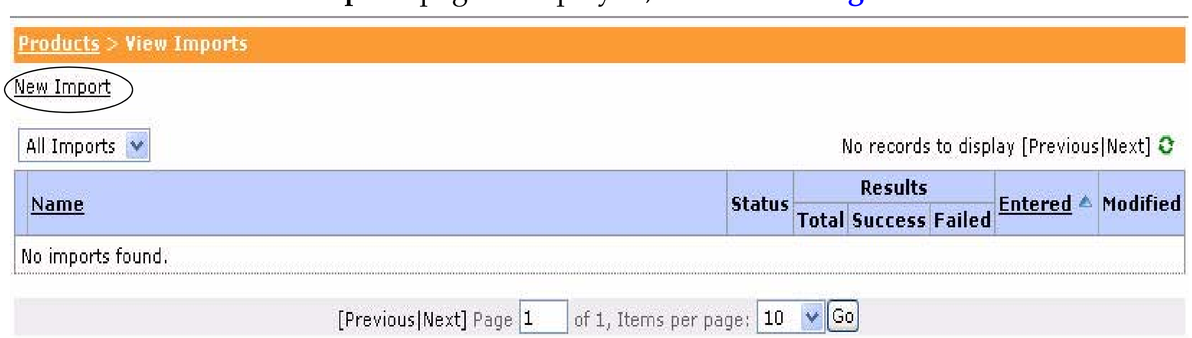


Figure 7.38 Accessing the View Imports Page

2. Click the **New Import** link, as shown in **Figure 7.38**.

   The **New Import** page is displayed, as shown in **Figure 7.39**.

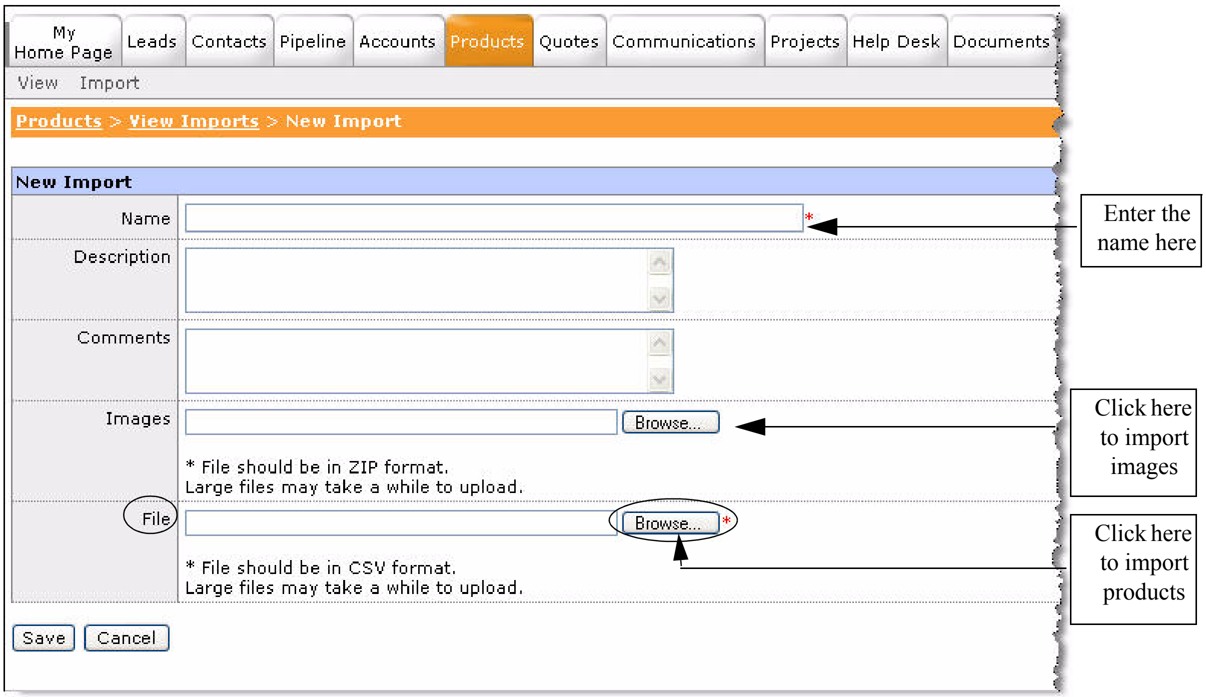


Figure 7.39 Viewing the New Import Page

3. Enter the **Name**, a brief description, and comments, as shown in **Figure 7.39**.
4. Click **Browse,** as shown in **Figure 7.39**.

   The file dialog to select the relevant file is displayed.
5. Select the relevant .csv file and click **Open**.

   The file name is displayed in the text box beside **File**, as shown in **Figure 7.39.**
6. Optionally, to import the images, click **Browse**.

   The file dialog to select the relevant file is displayed.
7. Select the .zip file and click **Open**.

   The file name is displayed in the text box beside **Images.**
8. Click **Save**.

The **Upload Complete** page is displayed, as shown in **Figure 7.40**.

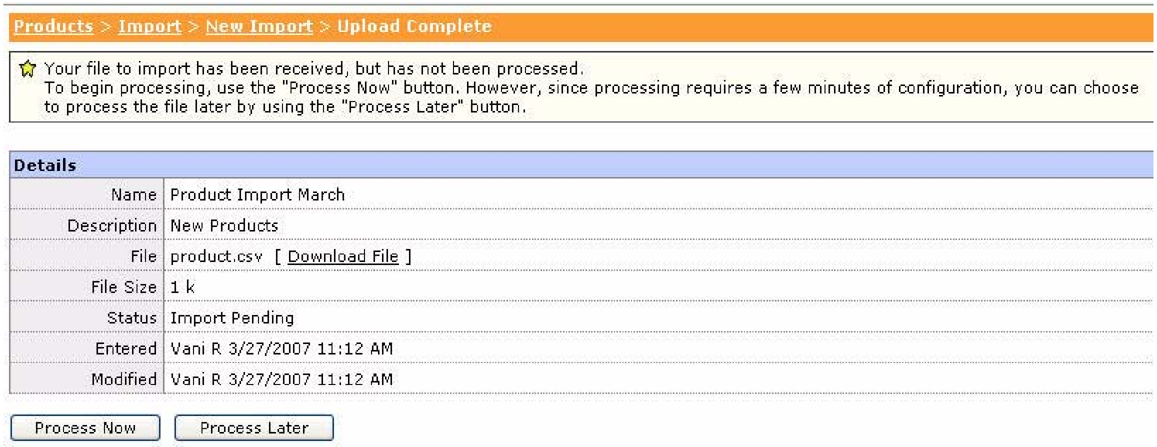


Figure 7.40 Viewing the Upload Complete Page

9. Click **Process Now** to initiate the processing of product details. Click **Process Later** to save the import data and continue processing later.

   Clicking **Process Now** displays the **Process Import** page, as shown in **Figure 7.41**.

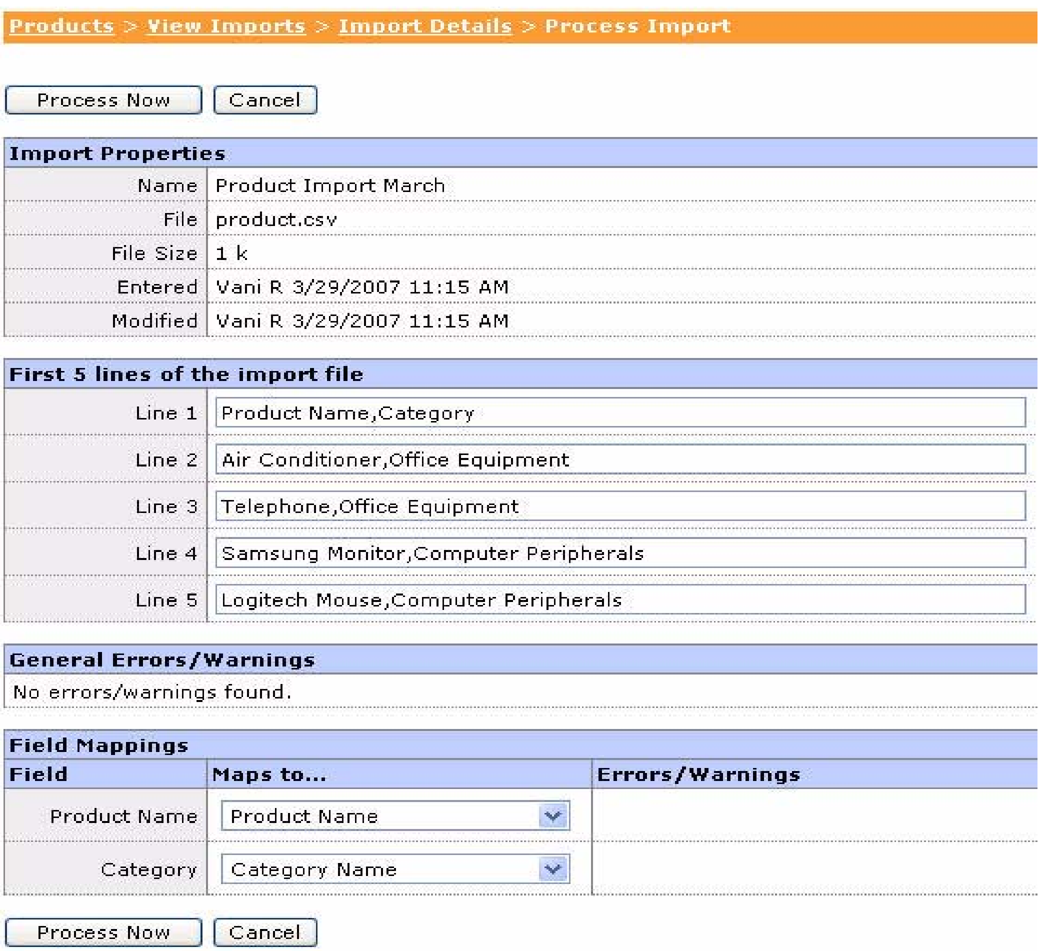


Figure 7.41 Viewing the Process Import Page

10. Map the fields names in your .csv file to the corresponding field names in the **Products** module. Mapping enables you to associate the fields defined in your product import file with the product related fields defined in Centric CRM.

11. Click **Process Now** to begin the processing.

    The **View Import** page with the import name and status of the import file is displayed, as shown in Figure 7.42.

Note: Centric CRM's Product Name has to be mapped with a field in the .csv file. Product name is a mandatory field.The other fields are optional.

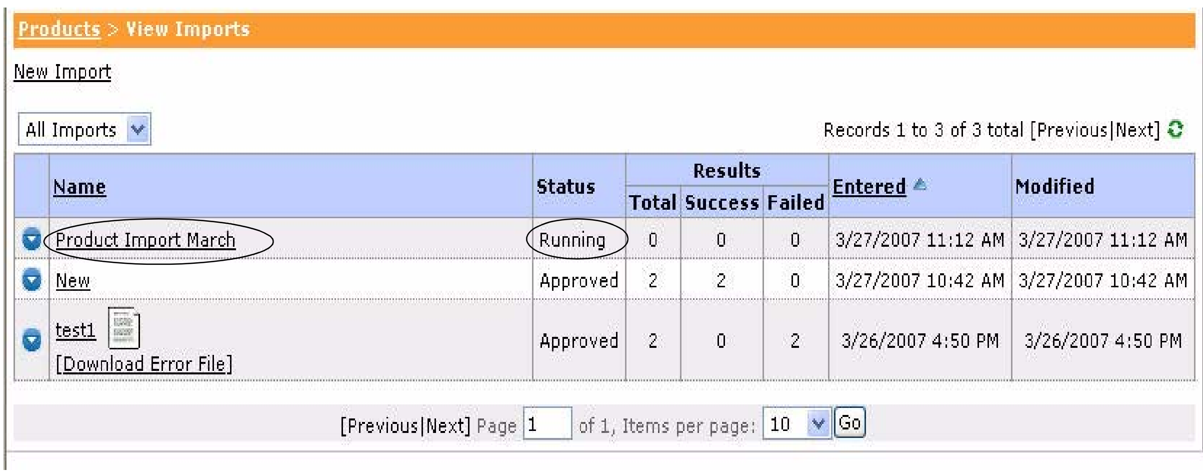


Figure 7.42 Viewing the Status of the Import

12. To approve the import, click the import name, as shown in Figure 7.42.

The **Import Details** page is displayed, as shown in **Figure 7.43**.

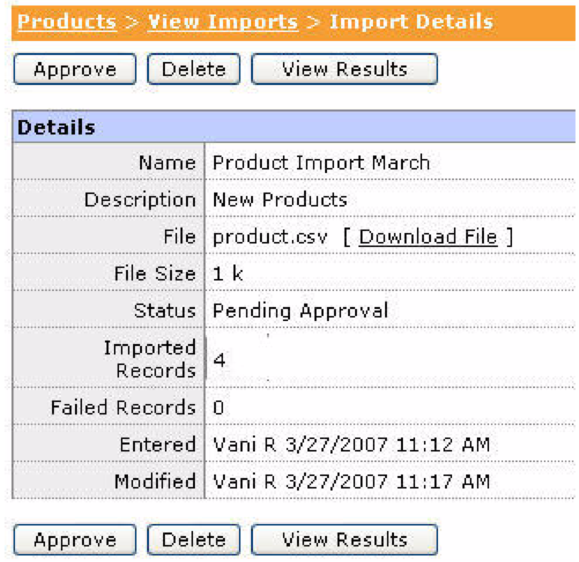


Figure 7.43 Viewing the Import Details Page

13. Click **Approve** to complete the process of importing.

The **Import Details** page is displayed, as shown in **Figure 7.44**, giving you an option to view the imported products.

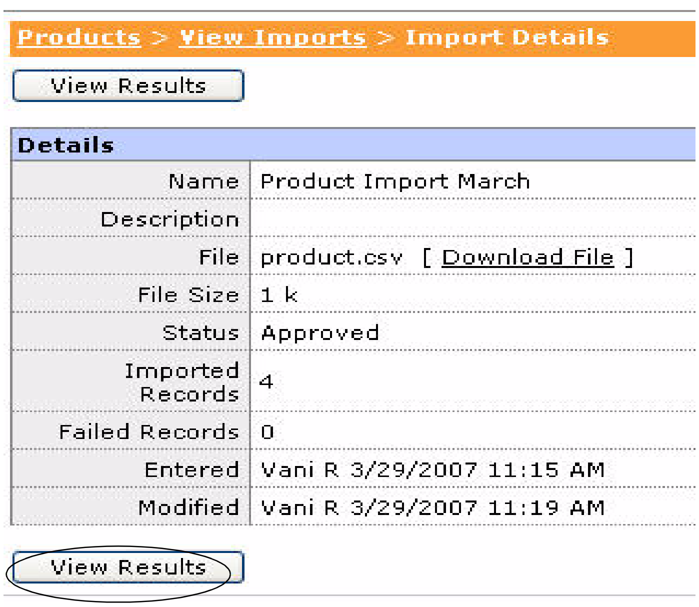
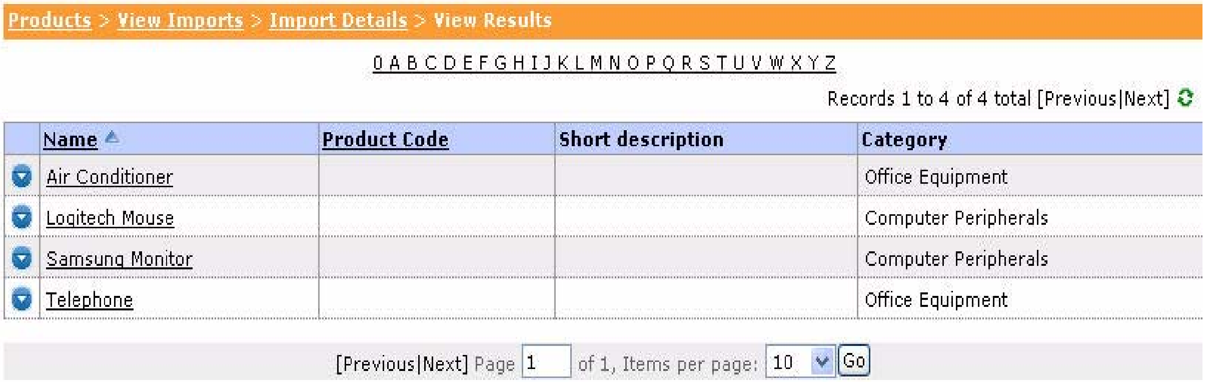


Figure 7.44 Viewing Import Details Page

14. Click the **View Results** button.

The **View Results** page listing the imported products is displayed, as shown in **Figure 7.45**.


Products > View Imports > Import Details > View Results

0 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Records 1 to 4 of 4 total [Previous|Next]

	Name	Product Code	Short description	Category
	Air Conditioner			Office Equipment
	Logitech Mouse			Computer Peripherals
	Samsung Monitor			Computer Peripherals
	Telephone			Office Equipment

[Previous|Next] Page 1 of 1, Items per page: 10 Go

Figure 7.45 Viewing the Imported Products

CHAPTER
8

Understanding Quotes

This chapter provides information on the **Quotes** module of Centric CRM. This module enables you to maintain quotes, which you provide to your customers, in an organized way.

This chapter contains the following sections:

8.1 How Does This Module Help You?

In the normal course of business, your customers will need to be informed of your offers and prices for the various products and/or services that you offer. This information is usually conveyed in the form of a quote. These quotes differ from customer to customer, based on parameters including cost and time.

The **Quotes** module provides options for performing the following tasks:

- Generating quotes
- Submitting quotes to your customers
- Maintaining each quote's history

Items being quoted are basically a list of products and services, which can be looked up from the product catalog.

You can access quotes by clicking the **Quotes** tab. All quotes that refer to a certain account are available under the account's **Quotes** sub-tab. You can navigate to the specific account to review all its associated quotes. For more information on accessing the **Quotes** sub-tab for a specific customer, refer to **Section 6.12, "Adding Quotes"**.

8.2 Viewing the Quotes Home Page

Once a customer base is formed, a number of quotes will be available on the system at a given point of time. Clicking **Quotes** displays the **Search Quotes** page by default, as shown in **Figure 8.1**. The **Search Quotes** page can also be accessed by clicking the **Search** link, as shown in **Figure 8.2**. You can search for quotes by specifying the search criteria.

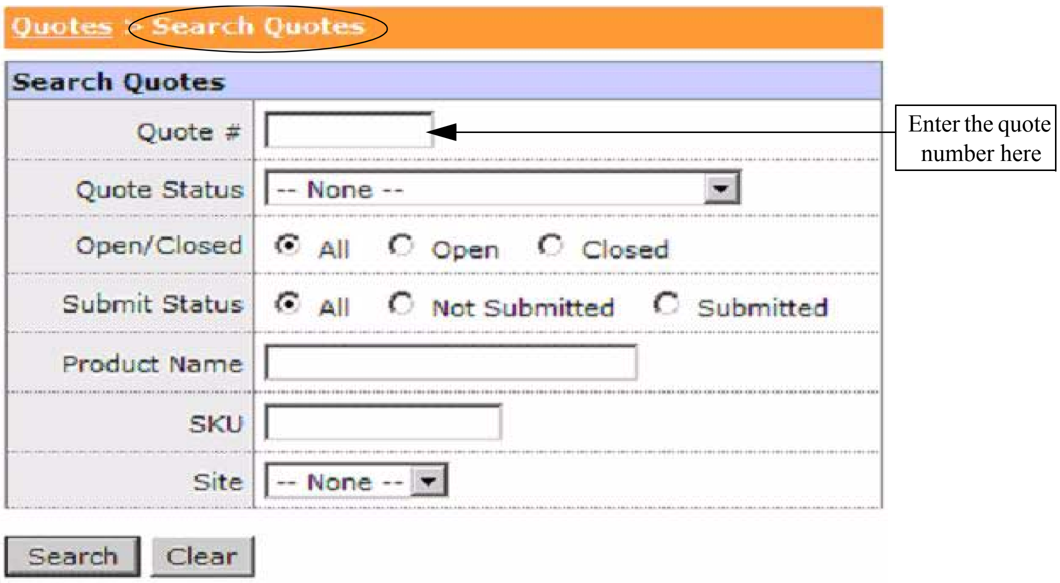


Figure 8.1 Quotes Search Page

If you want to view all the available quotes, leave all fields empty and click **Search**. The menu bar in the **Quotes** page has the **Add** and **Search** links, as shown in **Figure 8.2**.

Figure 8.2 Quotes Menu Bar

Searching for quotes in the system displays a list of quotes, as shown in **Figure 8.3**. The page displays the following information:

- Account details
- Description
- Status
- Date of entry

Figure 8.3 Quotes Search Results

8.3 Adding a Quote

Click **Add a Quote** on the **Search Results** page or **Add** on the menu bar to add a quote. The **Add Quote** page is displayed, as shown in **Figure 8.4**.

The following details can be specified for a quote:

- **Description**. A concise description of the purpose for which the quote is being issued.
- **Organization.** The customer account for which the quote is being issued.
- **Contact**. The contact for this customer account, to whom the quote will be sent.
- **Email address/Phone number/Fax number**. The customer's contact details.
- **Address**. The customer's mailing address.
- **Opportunity**. The opportunity to which the quote applies.
- **Delivery**. The mode of delivery of the quote.
- **Status**. The current status of the quote.
- **Expiration date**. The expiration date of the quote.
- **Logo**. Logo refers to the company logo that appears on the quote.

  An admin can configure the logos that can be included as part of the quote's header information.
- **Internal Notes**. Any additional details that provide more information about the quote.

Click **Insert** once you have entered all the information.

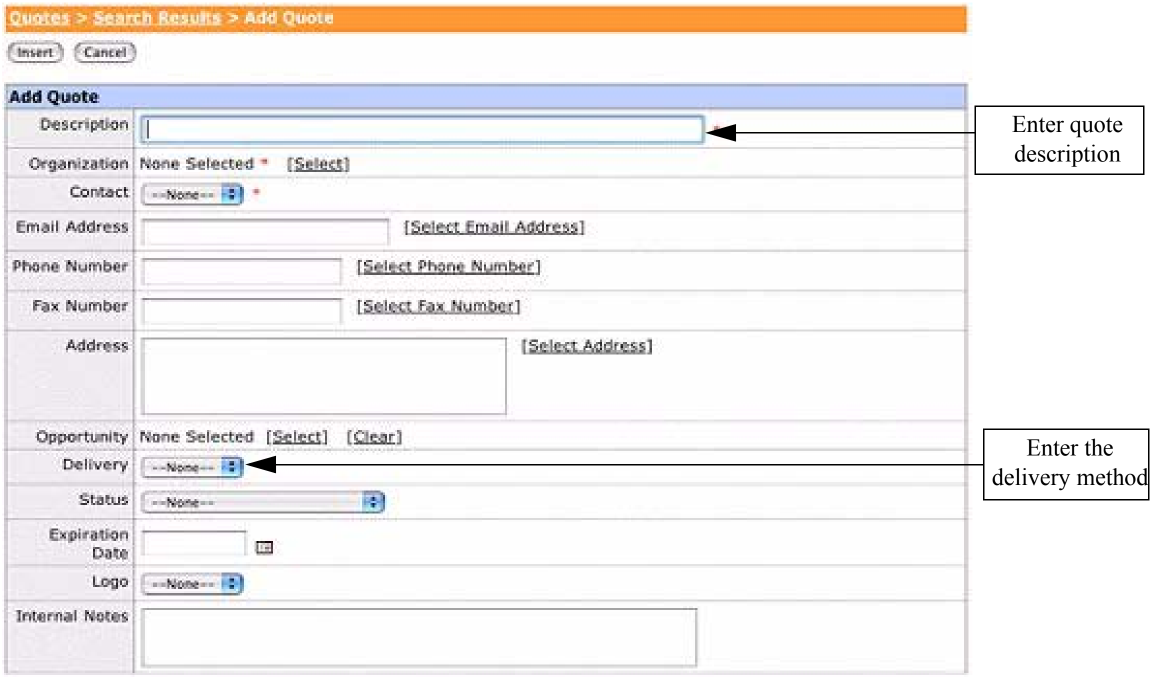


Figure 8.4 **Add Quote Form**

8.4 Viewing Quote Details

After you have entered the basic quote information and inserted the quote into the database, you will be taken to the **Quote Details** page, as shown in **Figure 8.5**.

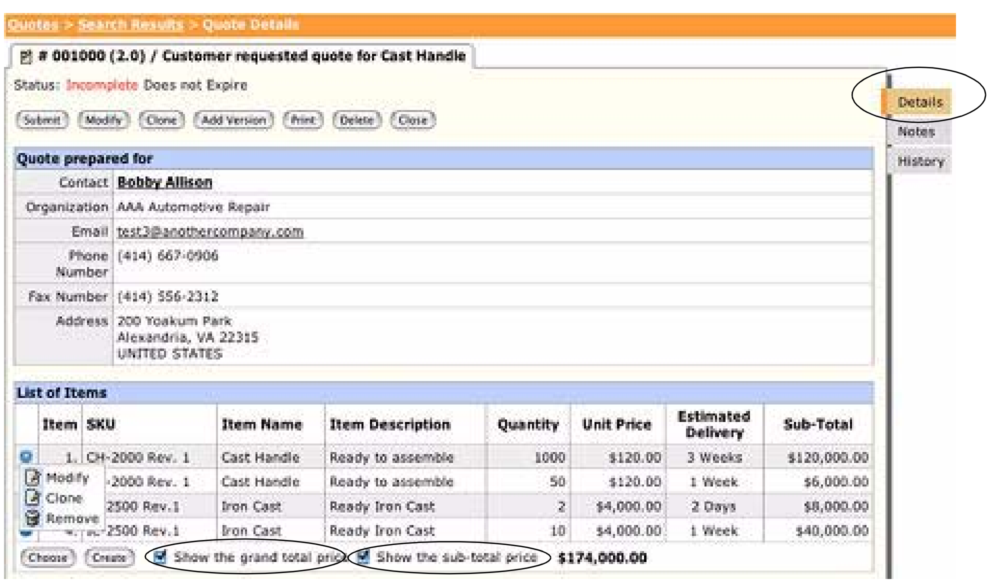


Figure 8.5 **Quote Details**

On the **Quote Details** page, you can define items (products and services) that need to be included in the quote, for more information, refer to **Section 8.4.1, "Adding**

Quote Items" below, any specific remarks, for more information, refer to **Section 8.4.2, "Adding Quote Remarks"**, and specify terms and conditions, for more information refer to **Section 8.4.3, "Adding Quote Terms & Conditions"**.

After entering the contact information and list of items, the quote details display can be configured. To configure, you can check any or all of the checkboxes as listed below:

- **Show the sub-total price**, which displays an additional sub-total column in the list of items table.

  The column, as shown in **Figure 8.5**, displays an individual item's price, taking into account its specified quantity. For example, if 'x' costs $180, then 10 numbers of 'x' would be 10 * $180 = $1800.

- **Show the grand total price**, as shown in **Figure 8.5**, displays the grand total amount of all items for the quote under consideration.

Note: It is advisable to turn on both the options for easier verification.

Clicking the action icon displays a context menu with the following tasks:

- Cloning the selected quote
- Modifying the selected quote
- Removing the selected quote

8.4.1 Adding Quote Items

You can add any number of items (products and/or services) to an existing quote.

You can select the items from an existing catalog of products and services from a pop-up window which is displayed by clicking the **Choose** button, or create a quote item using **Create Item** from the pop-up window, as shown in **Figure 8.6**. This pop-up window is displayed by clicking **Create** on the **Quote Details** page.

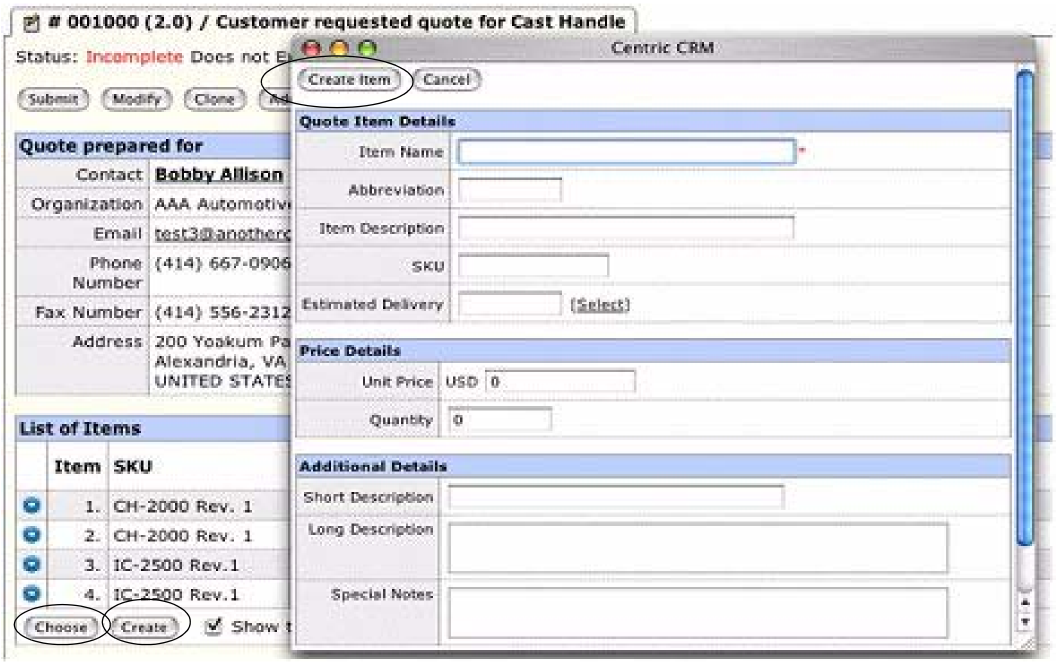


Figure 8.6 **Quote Add Item**

8.4.2 Adding Quote Remarks

You can add remarks to a quote in the following ways:

- Click **Choose**, as shown in **Figure 8.7**. A pop-up window is displayed listing the existing remark. Select an appropriate remark and click **Done**.
- Create a new remark for the quote by adding it to the existing pool. This can be done by clicking the **Create** button, as shown in **Figure 8.7**.

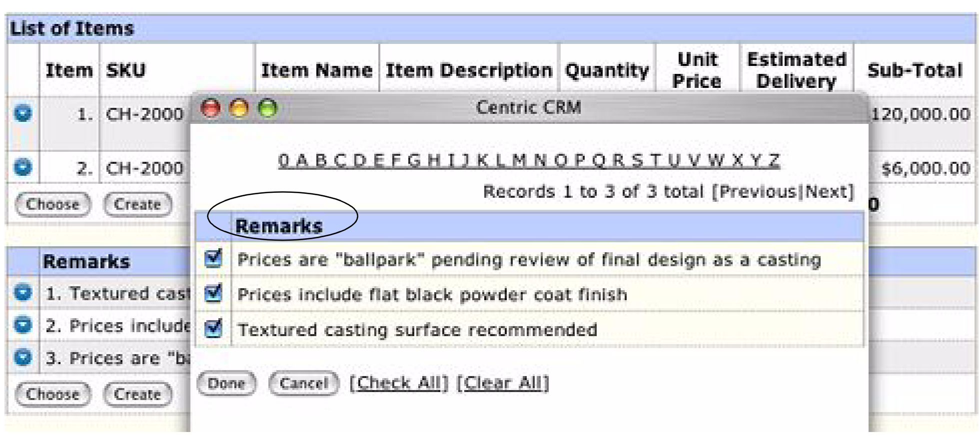


Figure 8.7 **Quotes Remarks**

8.4.3 Adding Quote Terms & Conditions

You can add terms and conditions to a quote in the following ways:

- Click **Choose**, as shown in Figure 8.8. A pop-up window is displayed listing the existing terms and conditions. Select an appropriate one and click **Done**.
- Create the terms and conditions for the quote by adding it to the existing pool. This can be done by clicking the **Create** button, as shown in Figure 8.8.

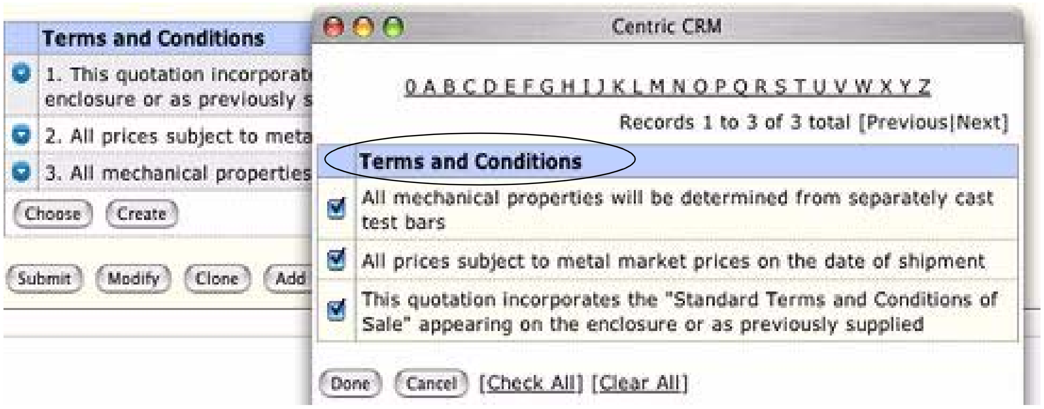


Figure 8.8 Quote Terms and Conditions

8.5 Understanding the Actions Performed on Quotes

Once a quote has been prepared, you can perform various actions on the quote. This section provides information on each action that can be performed on a quote.

Submitting a Quote

You can submit the quote by mailing the PDF version of the quote to the customer, or by delivering the paper version of the quote through other means. When you click **Submit** on the **Quote Details** page, a pop-up window is displayed that enables you to determine the means of delivering the quote. It also allows you to set a new status for the quote, if necessary. Select from the options, and click **Save** to perform the operation. A quote submit screen is shown in Figure 8.9.

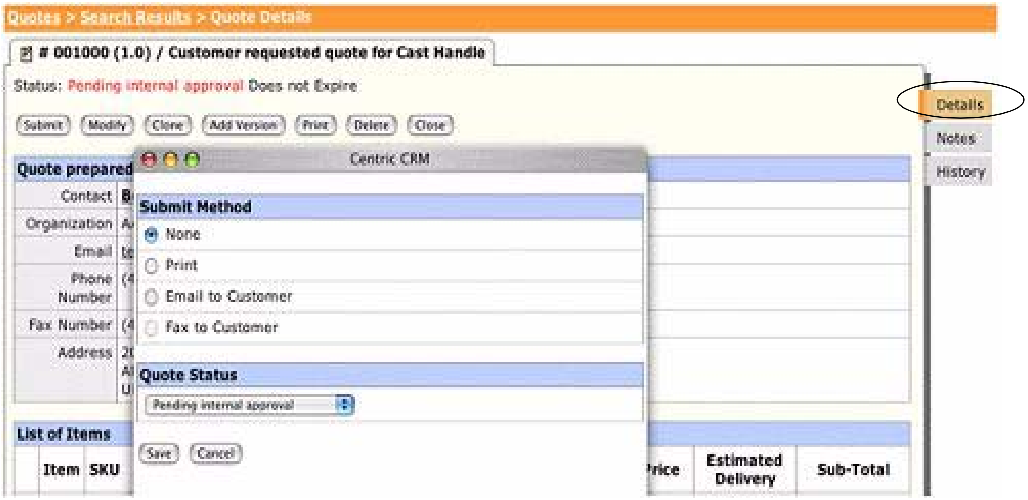


Figure 8.9 **Submit a Quote**

Modifying a Quote

Click **Modify** to modify the basic details of a quote.

Cloning a Quote

Often, you may need to use similar quotes for a number of your customers. Instead of creating a new one all over again, you can use the cloning feature.

Cloning quotes is a feature that enables you to add new quotes, without having to re-enter common information. You can clone a quote using the **Clone** option.

To clone a quote follow the steps listed below:

1. Click the **Clone** button and a pop-up window that allows you to change information for the cloned quote will be displayed.
2. Specify a new account and/or contact.

   The rest of the details will be automatically copied from the source quote to the cloned one, as shown in Figure 8.10.

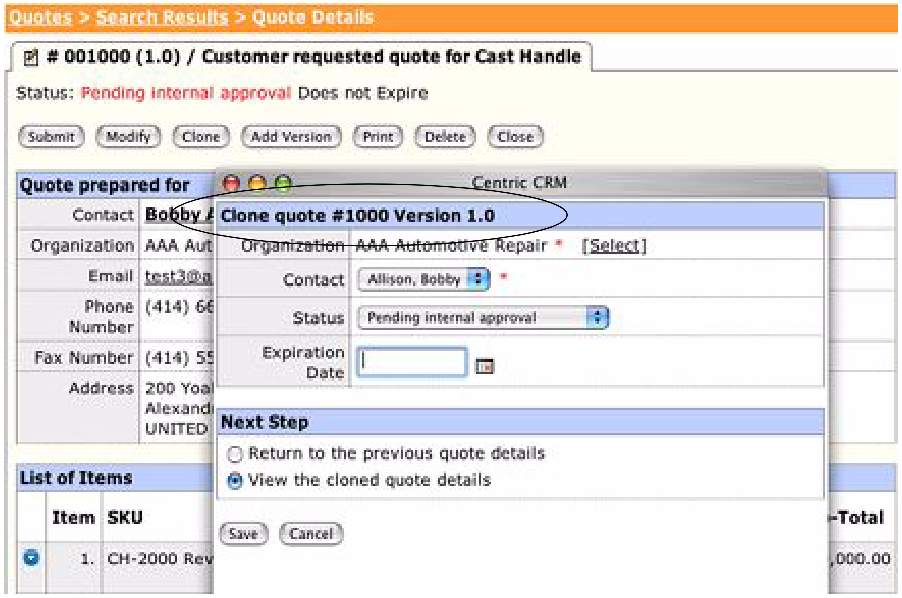


Figure 8.10 Clone a Quote

You can select to view either for the source quote or the cloned one.

3. Click **Save** to commit changes, or **Cancel** to abandon them.

Adding a Quote Version

You may need to update a quote for various reasons, such as price changes, holiday discounts, and special offers. This would require you to emphasize that this quote is not a regular modification, but a new version of the initial quote. To add a new version of the quote, click **Add Version** located on the **Quote Details** page.

When you click this option, a prompt will be displayed, asking you to confirm if you want to create a new version of the quote. Click **OK** and a new version of the quote will be created, and you will be taken to the Quote Details page for the new version. The system automatically adds a note, with a remark stating that this quote has been derived from a parent quote and is a version.

You can make changes to the version and, click **Update** to save these changes.

Printing a Quote

Clicking the **Print** option enables you to open or save the PDF version of the quote. You can either print the quote or email it as an attachment.

Deleting a Quote

Click **Delete** to delete a quote when it is no longer necessary to have it in the system.

Closing a Quote

When a quote is complete or becomes invalid for any reason, you can close the quote. Using the **Close** button on the **Quote Details** page. Clicking the Close option, displays a pop-up window, as shown in **Figure 8.11**. This window provides fields to specify the reason for closing the quote. Click **Save** to confirm your actions.

Closing a quote will not destroy the quote. The quote will be available for future use. Closed quotes will continue to appear in quote searches, but you cannot modify them. However, you can perform the following tasks on closed quotes:

- Clone the quotes
- Create newer versions of the quotes
- Print the quotes
- Delete the quotes

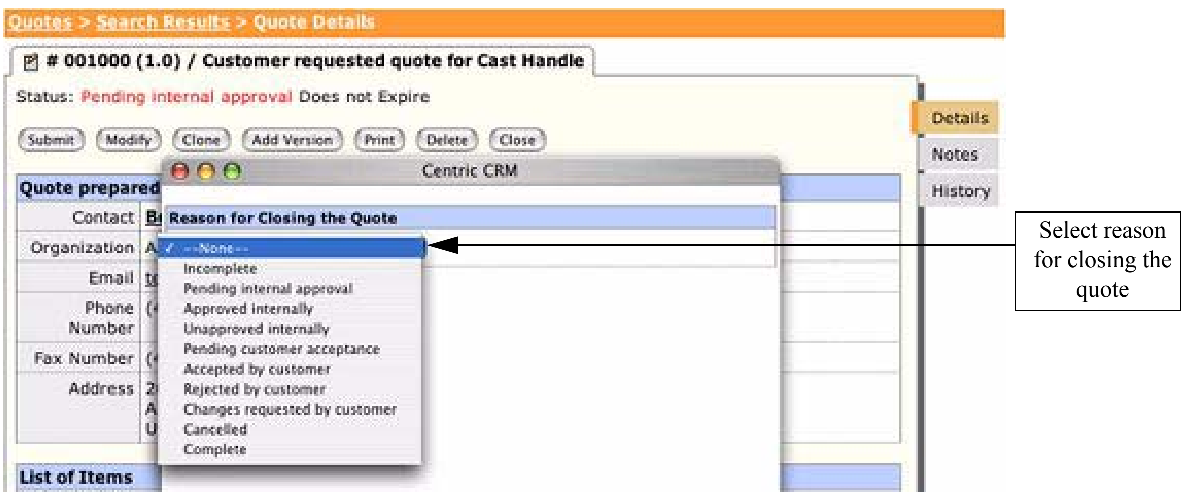


Figure 8.11 Close a Quote

8.6 Adding Quote Notes

The **Quote Notes** page enables maintenance of notes and remarks related to a specific quote, as shown in **Figure 8.12**. This page can be accessed by clicking the **Notes** sub-tab on the **Quote Details** page. Centric CRM automatically adds certain special remarks during various stages of a quote. You can also store crucial remarks against a quote which will help other users review the quote.

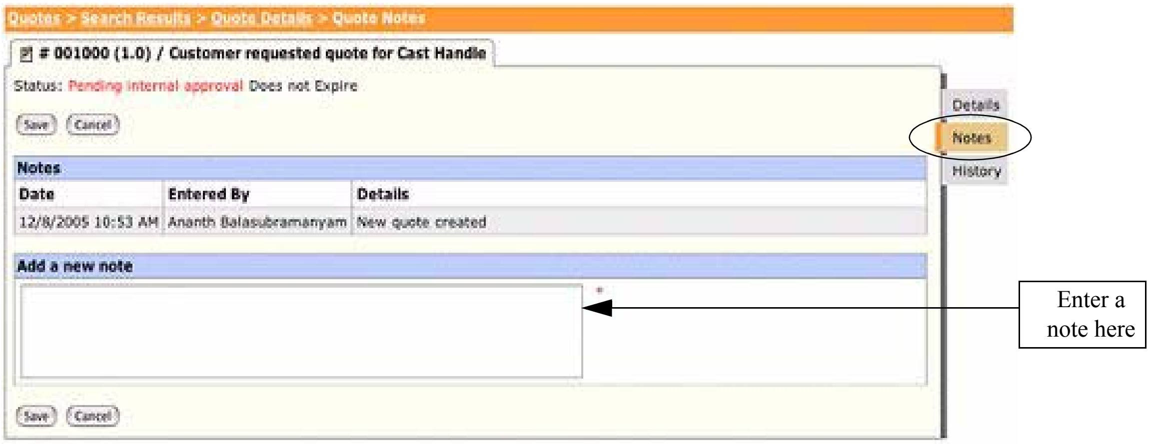


Figure 8.12 **Quote Notes**

8.7 Viewing Quote History

The **Quote History** page is a read-only area. This page can be accessed by clicking the **History** sub-tab on the **Quote Details** page. Centric CRM automatically adds special remarks at various stages and provides a view of how the quote has evolved over a period of time. The **Quote History** page is shown in **Figure 8.13**.

Figure 8.13 **Quote History**

8.8 Using the Quotes Logo Admin Feature

When a quote is ready to be submitted to a customer, the company's logo can be used as part of the quote header to customize its appearance. Any user with admin access to the quote logo configuration feature can upload a set of logos that users can attach to a quote.

The logos are available as a list of optional fields, when adding or modifying a quote. You can upload a specific logo that needs to appear on the quote, as shown in **Figure 8.14**.

Logos that are uploaded under the **Admin** module can be in any of the following formats - GIF, JPG, JPEG, TIFF, PNG, BMP, WMF.

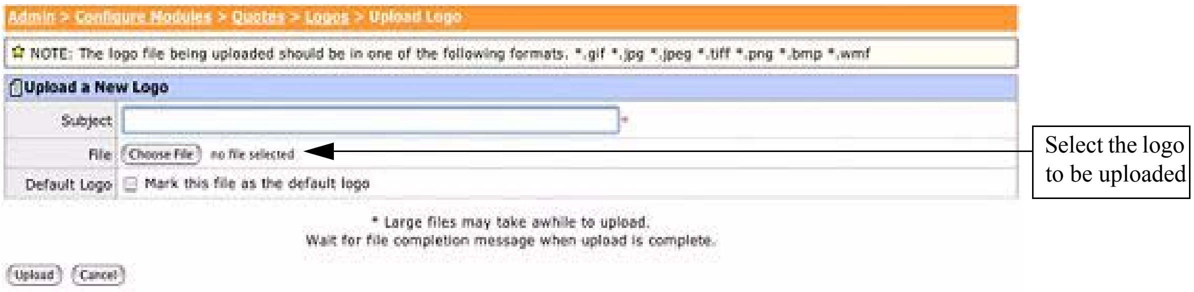


Figure 8.14 Quote Logo Upload Feature

CHAPTER
9

Understanding Communications

This chapter provides information on the **Communications** module of Centric CRM. This module enables you to arrange, execute, and monitor promotional campaigns, which lead to long-standing relationships with customers through pro-active communication.

This chapter contains the following sections:

- **Section 9.1, "How Does This Module Help You?"**
- **Section 9.2, "Overview of the Communications Home Page"**
- **Section 9.3, "Viewing the Dashboard"**
- **Section 9.4, "Viewing Campaign Details"**
- **Section 9.5, "Using Campaign Builder"**
- **Section 9.6, "Adding a Campaign"**
- **Section 9.7, "Adding Groups"**
- **Section 9.8, "Adding Messages"**
- **Section 9.9, "Adding Attachments"**

9.1 How Does This Module Help You?

Interactive surveys in your campaigns help in making your business effective, by enabling more involvement from customers. Campaigns and surveys also make your association long-standing and mutually beneficial. They help in expanding your business through word-of-mouth advertising.

Centric CRM's **Communications** module can be used for the following purposes:

- Register campaigns and control their execution.
- Send a single message to multiple recipients.
- Schedule campaigns for later delivery.
- Create an interactive forum for exchange of ideas and information.

9.2 Overview of the Communications Home Page

The **Communications** home page lists the features available in the module, and describes their functions with direct links to each of them, as shown in Figure 9.1.

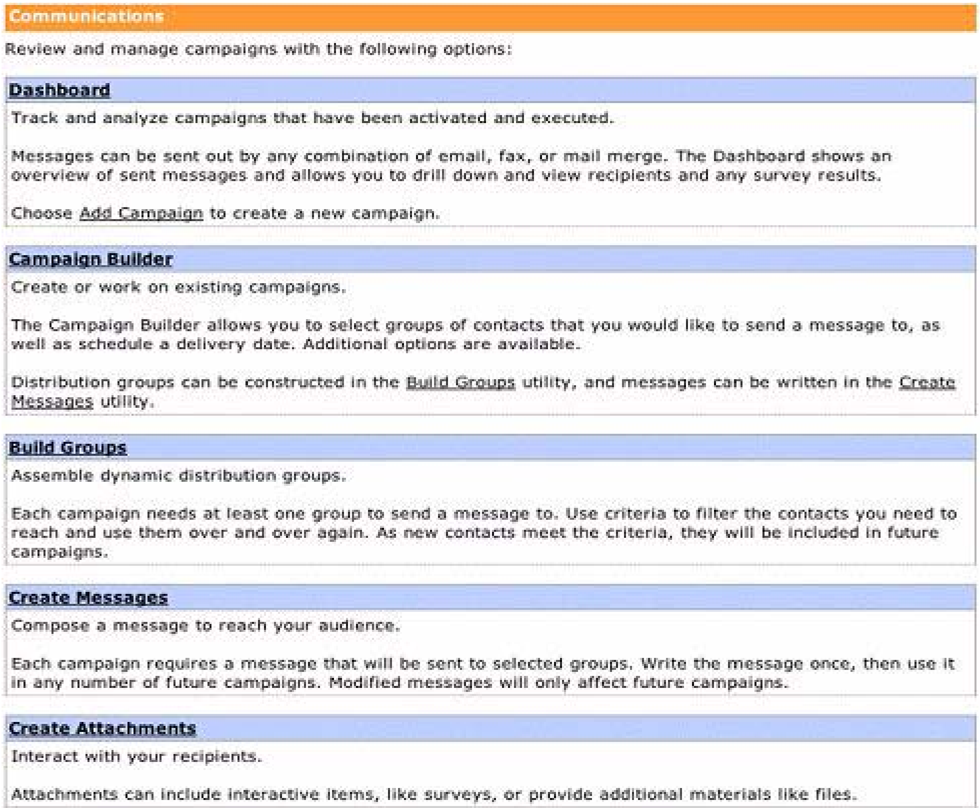


Figure 9.1 Communications Home Page

The features of the **Communications** module are as specified below:

- **Dashboard** - enables you to track and analyze ongoing campaigns, and design new campaigns
- **Campaigns Builder** - enables you to select the contacts to whom the message can be sent, and to schedule delivery dates
- **Groups Builder** - enables you to build separate groups of contacts for your messages

  Only those contacts that meet certain criteria can be included in the campaigns.
- **Messages** - enables you to compose and modify messages for each campaign
- **Attachments** - enables you to include files, questionnaires, newsletters or surveys along with your message

A menu bar located on top of the screen displays individual links to each feature, as shown in Figure 9.2.

Figure 9.2 Communications Menu Bar

9.3 Viewing the Dashboard

The **Dashboard** lists all active campaigns, as shown in Figure 9.3. The **Dashboard** enables you to perform the following tasks:

- View campaign details.
- Delete unwanted or defunct campaigns.
- Export the data of a campaign survey into an Excel spreadsheet for reference and analysis.

Figure 9.3 Communications Dashboard

You can select from the following options:

- Running campaigns that belong to you
- All running campaigns at a given point of time or all instant ones

If the list of campaigns is large, you can use the alphabet indicator at the top to find a campaign by the first letter of its name, so tracking down a particular campaign is easier. The message status of each campaign is listed, along with the number of recipients, start date, and activity status.

9.4 Viewing Campaign Details

Campaigns can be a running campaigns, where all details are known and no adjustments are required, and inactive campaigns, where it is easier to introduce changes and additions to campaign parameters.

When you click the name of a **Running Campaign** in the dashboard, the system will navigate you to the multi-tabbed **Campaign Details** page, as shown in Figure 9.4. The sub-tabs on the **Campaign Details** page listed are:

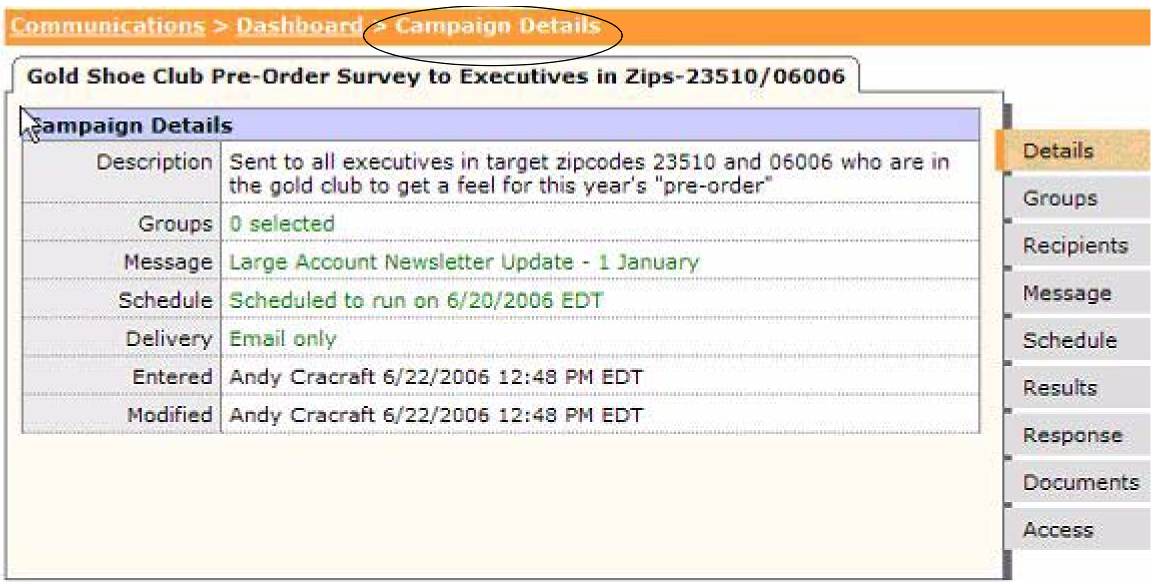


Figure 9.4 Active Campaign Details

- **Details**. Selecting this option displays all basic information concerning the campaign, as specified below:
    - Short description of the campaign
    - Related groups
    - Message details and delivery details (if sent through email, fax, or mail merge)
    - Schedule (date of delivery)
    - Information about the user who created and last modified the campaign
- **Groups**. Selecting this sub-tab leads to a page which contains a description of the selection criteria for the contacts to which the campaign applies.
- **Recipients**. Selecting this sub-tab lists the recipients of the campaign message.
- **Message**. Selecting this sub-tab displays the campaign message.
- **Schedule**. Selecting this sub-tab lists the campaign message delivery schedule and delivery method.
- **Results**. Selecting this sub-tab displays a summary of results of a survey that you may have sent along with the campaign message.
- **Response**. Selecting this sub-tab lists people who responded to the survey that you may have sent along with the campaign message.

  By clicking a person's name, you will view the person's response.
- **Documents**. Selecting this option displays the documents attached to the campaign.

  You can attach a document by clicking **Add a Document** located at the top of the **Documents** page. You can also export campaign survey results to an MS Excel spreadsheet by clicking **Export Campaign to Excel file**.

When you click an inactive campaign name on the campaigns list, the **Campaign Details** page is displayed. You can define campaign attributes including groups and messages. You can also rename, activate, or delete the campaign.

9.5 Using Campaign Builder

Click **Campaign Builder** on the **Communications** home page, or **Campaigns** on the main menu. A page with the following details is displayed, as shown in **Figure 9.5**:

- Group of contacts to which the campaign was addressed
- Message details
- Delivery schedule
- Start date

The campaigns displayed on this page are incomplete or inactive campaigns. A campaign is considered incomplete or inactive in the following situations:

- if you haven't defined the groups, messages and delivery details.
- if all the above mentioned details have been specified but the campaign has not been activated.

You can navigate among the campaigns using the alphabet indicator located at the top and view campaign details by clicking campaign names.

Figure 9.5 Campaign List

Clicking the action icon displays a context menu, with options to perform the following tasks:

- View campaign details
- Modify campaign details
- Delete a campaign

To activate an incomplete campaign click the **Activate** link on the **Campaign List** page, as shown in **Figure 9.5**.

9.6 Adding a Campaign

To add a campaign follow the steps listed below:

1. Click **Add a Campaign**, as shown in **Figure 9.5**.

   The campaign builder will lead you through the process of registering a new campaign.

2. Enter the name of your campaign and a brief description.

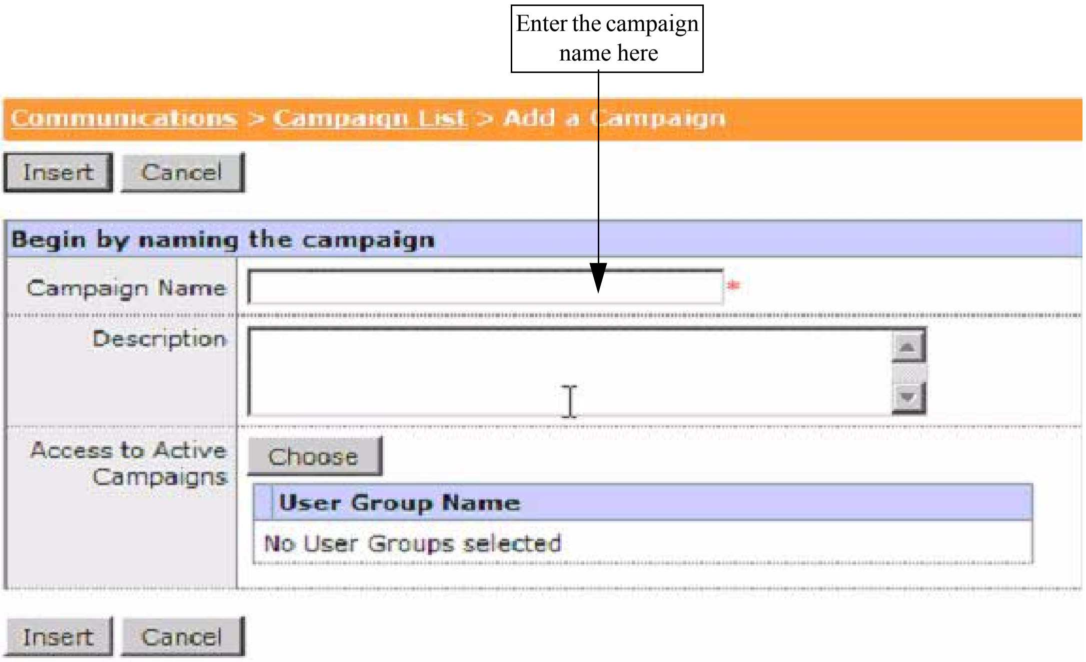


Figure 9.6 Adding a Campaign

3. After entering the name and description, click **Insert** and the incomplete **Campaign Details** page is displayed, as shown in **Figure 9.7**.

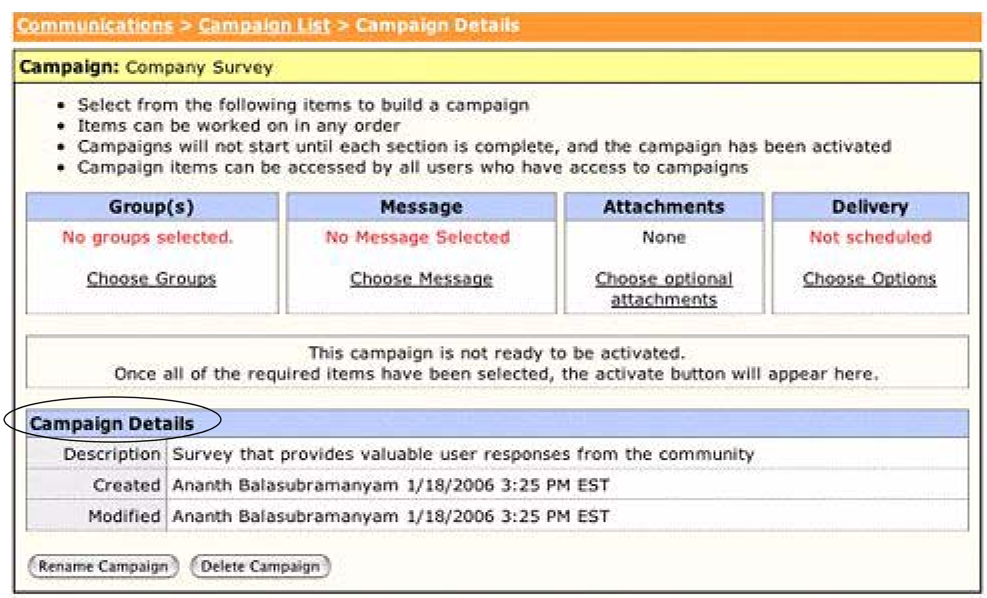


Figure 9.7 Inactive Campaign Details

This page lists the campaign items (groups, message, attachments and delivery) and instructions concerning the campaign completion and activation. The campaign will remain incomplete until all the details have been entered.

4. From the options in **Groups**, select a list of contacts, as shown in **Figure 9.8**, to whom the campaign is addressed (by designation, department, and area). For

information on adding a new group, refer to **Section 9.7, "Adding Groups"**. You can preview the recipients to confirm the target audience. Click **Update Campaign Groups** when you have selected a group.

The **Messages** page will be displayed, as shown in **Figure 9.8**.

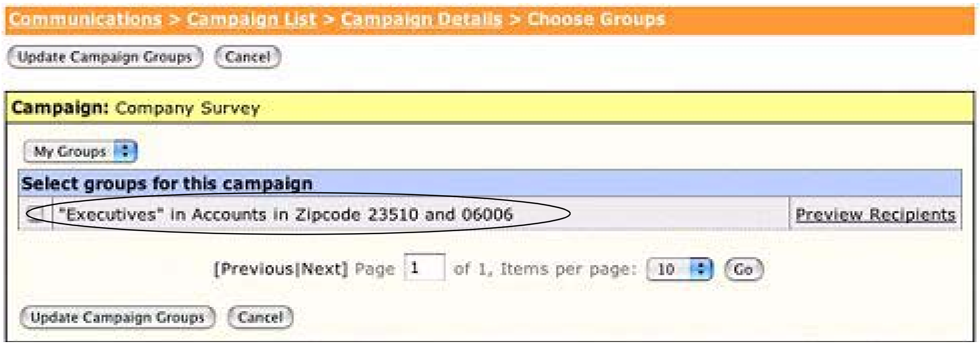


Figure 9.8 Choosing Groups

5. Select the campaign message from the options in the **Message** drop-down menu. For information on adding messages, refer to **Section 9.8, "Adding Messages"**.

   A preview is displayed, as shown in **Figure 9.9**.

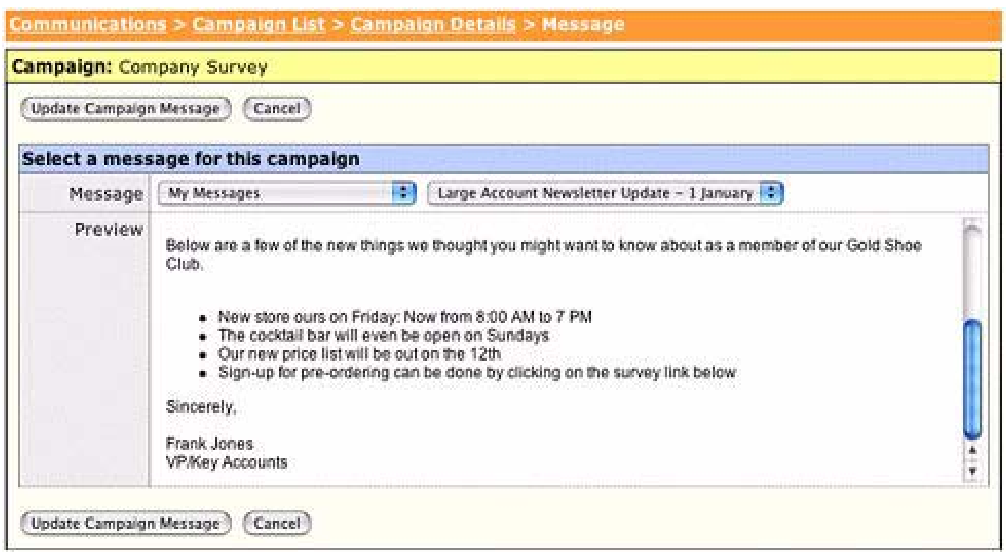


Figure 9.9 Choosing the Message

6. Click **Update Campaign Message.**

   The **Attachments** page is displayed, as shown in **Figure 9.10**. You can include documents with your message to make your campaign interactive. These documents may include the following information:

   - Survey
   - Address request update

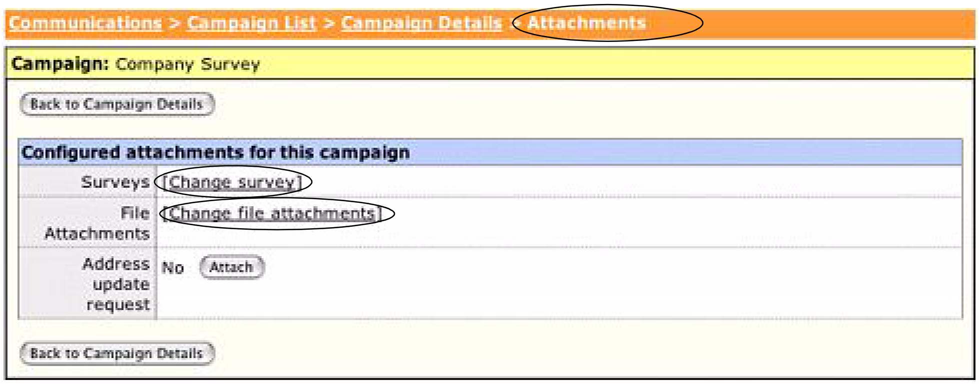


Figure 9.10 Choosing Attachments

7. Click **Change survey** link, as shown in **Figure 9.10**.

   The **Surveys** page is displayed, as shown in **Figure 9.11**.

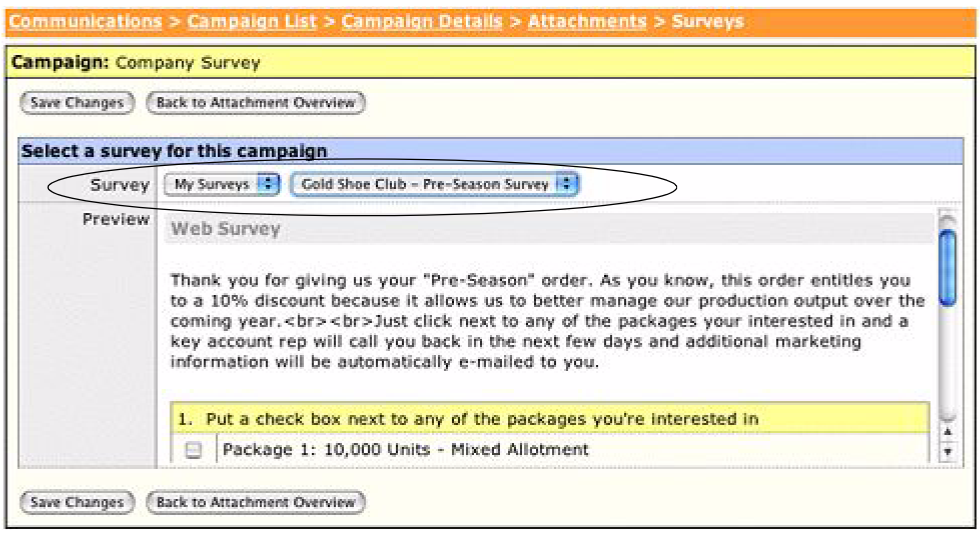


Figure 9.11 Attaching a Survey to a Campaign

8. Select the survey and click **Save Changes**.

   The **Attachments** page is displayed, as shown in **Figure 9.10**.

9. Click **Change file attachments** link, as shown in **Figure 9.10**.

   The **File Attachments** page is displayed, as shown in **Figure 9.12**. As the campaign is in an incomplete stage, you can make the required changes and attach the modified file or a new file. Once you have attached the file, click **Upload File**. The **Delivery page** will be displayed, as shown in **Figure 9.13**.

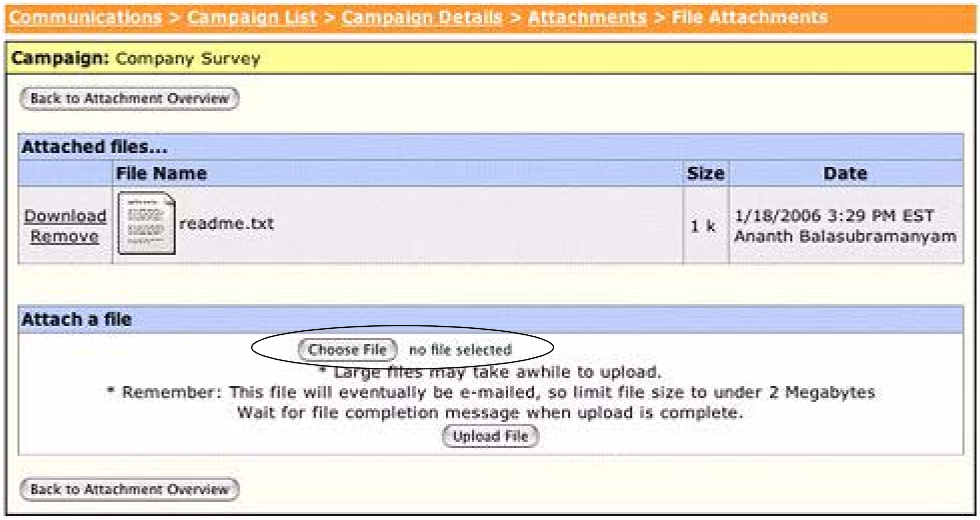


Figure 9.12 Attaching Files to a Campaign

10. Enter the campaign delivery date and specify the time. Select the delivery method from the **Delivery Method** drop-down menu.

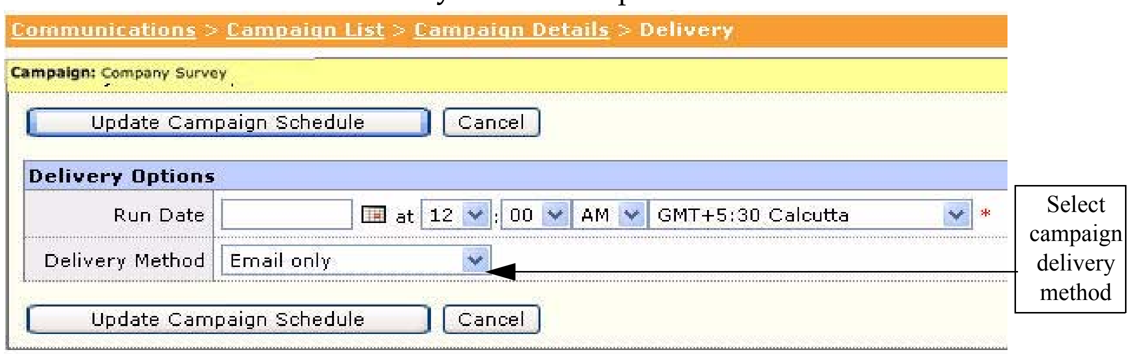


Figure 9.13 Choosing Delivery Options

11. Click **Update Campaign Schedule**, which displays a link allowing you to activate the campaign.

    The campaign details are displayed, as shown in **Figure 9.14**. You can perform the following tasks:

    - Rename the campaign
    - Delete the campaign

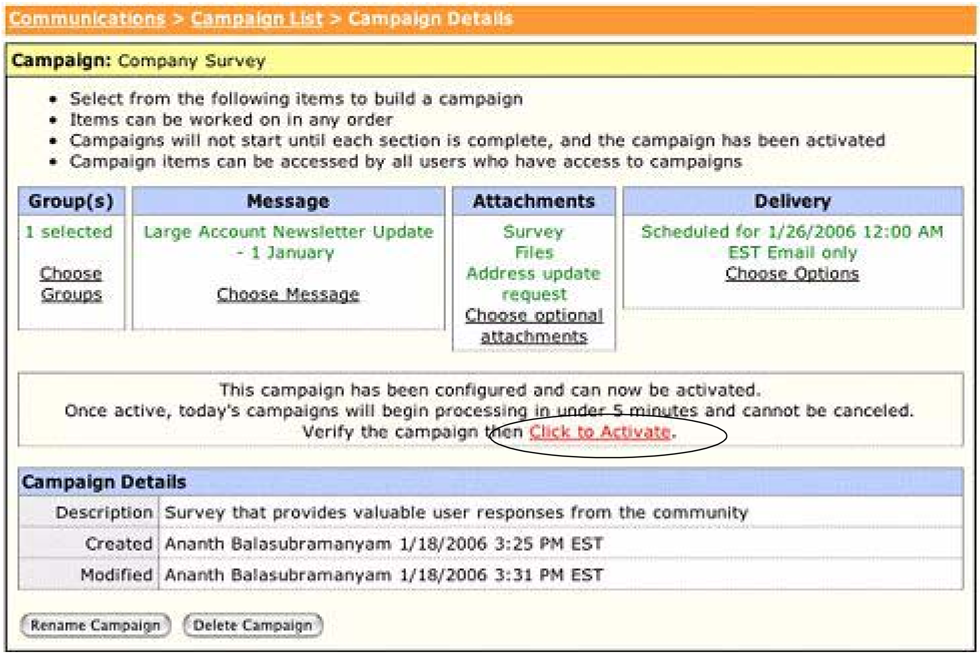


Figure 9.14 Activating a Campaign

12. Click the link **Click to Activate** to submit the campaign after all the necessary modifications have been made.

Note: The tab **Click to Activate** will be displayed only after all the details have been entered.

However if you do not wish to activate the campaign now you can activate it at a later stage. For details on activating a campaign from the **Campaign List** page, refer to **Section 9.5, "Using Campaign Builder"**.

9.7 Adding Groups

For each campaign, you have to define the campaign's target audience. You can add a number of groups in advance, and use them as required.

Click **Build Groups** on the **Communications** home page, or **Groups** on the module's main menu, and a list of all available contact groups is displayed, as shown in **Figure 9.15**.

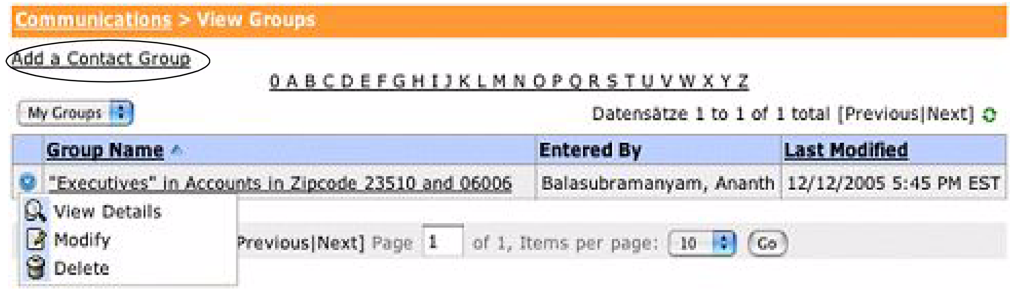


Figure 9.15 Groups List

You can click the group's name to view the selection criteria, as shown in **Figure 9.16**.

Figure 9.16 Group Details

To add a new group, click **Add a Contact Group**, as shown in **Figure 9.15**. An **Add a Group** page is displayed, as shown in **Figure 9.17**. Enter the following details:

- Name of the group
- Selection criteria
- Specific contacts for the group
- Requirements to pick contacts among all registered ones

The group will include all contacts that you have specified individually. Among the rest, only those that satisfy all selection criteria will be selected.

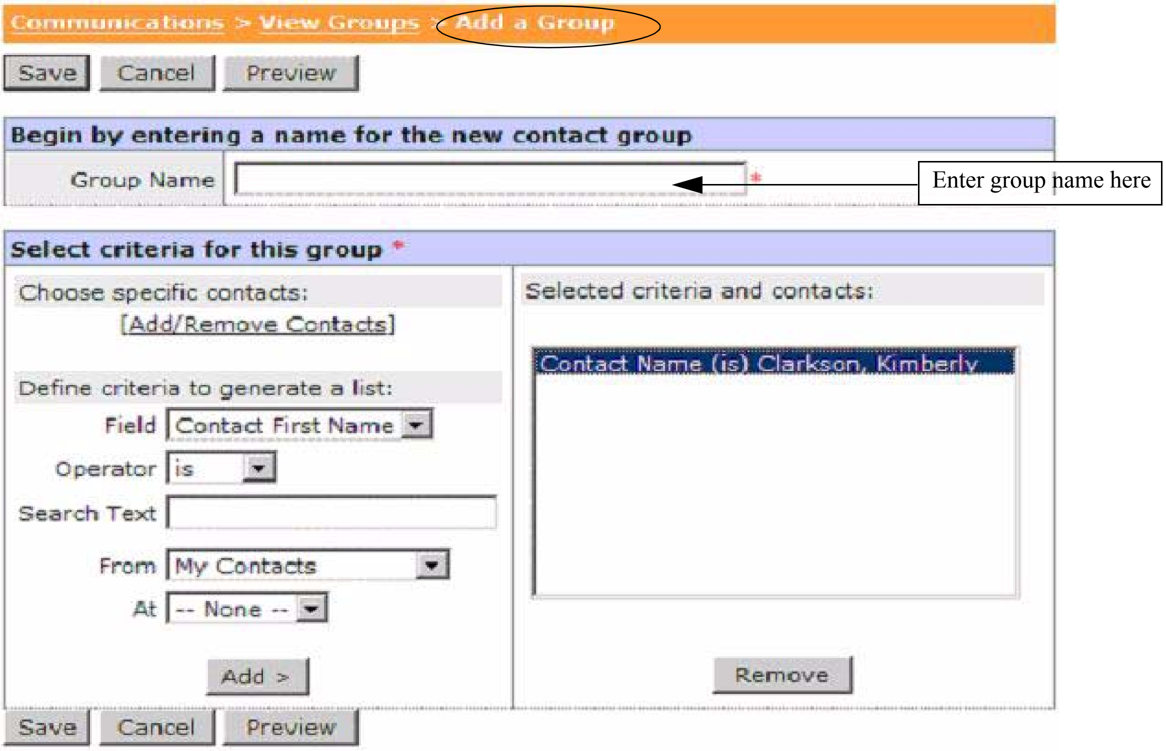


Figure 9.17 Adding a Group

After you have selected your criteria, you can preview the list of group members by clicking **Preview**. A **Group Details** page is displayed, as shown in **Figure 9.18**.

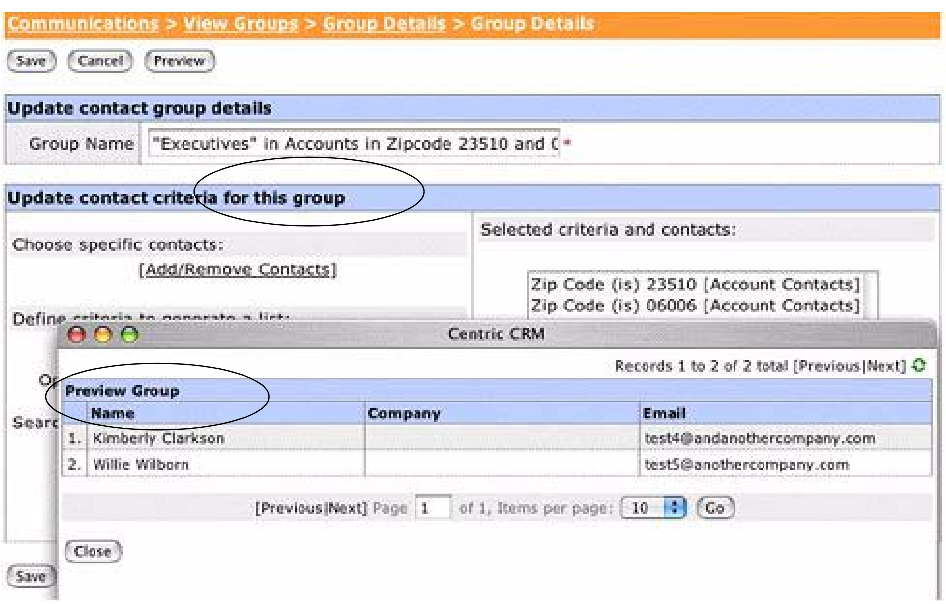


Figure 9.18 Group Preview

Click **Save** to add this new group.

9.8 Adding Messages

A message, which explains the campaign, must be attached to a campaign. You can prepare and save a number of messages in advance and then use them for your campaigns later.

Click **Create Messages** located on the **Communications** home page or **Messages** on the module's main menu to view a list of all available campaign messages, as shown in **Figure 9.19**.

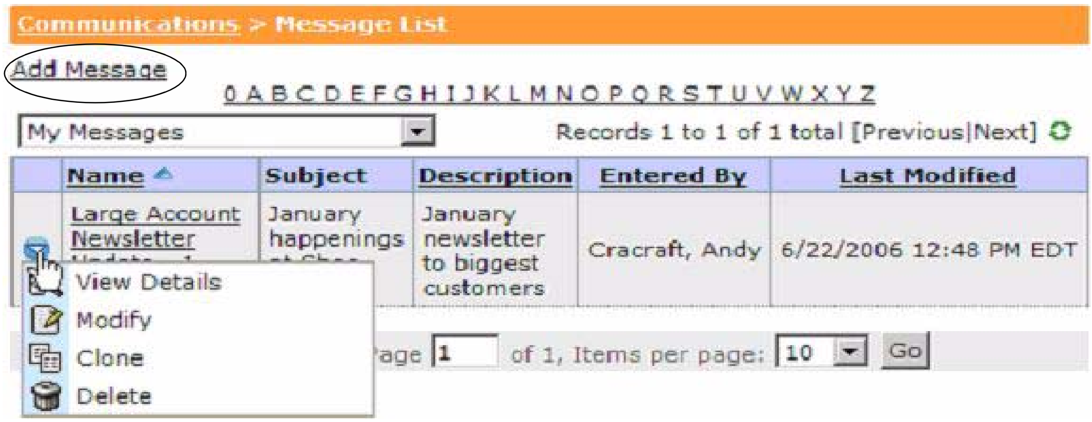


Figure 9.19 Messages List

To view how a message will look to its recipient, click the message name. You will be taken to the **Message Details** page, as shown in **Figure 9.20**. Clicking the action icon, displays a context menu, which provides options to perform the following tasks:

- Modify a message
- Delete a message
- Clone a message

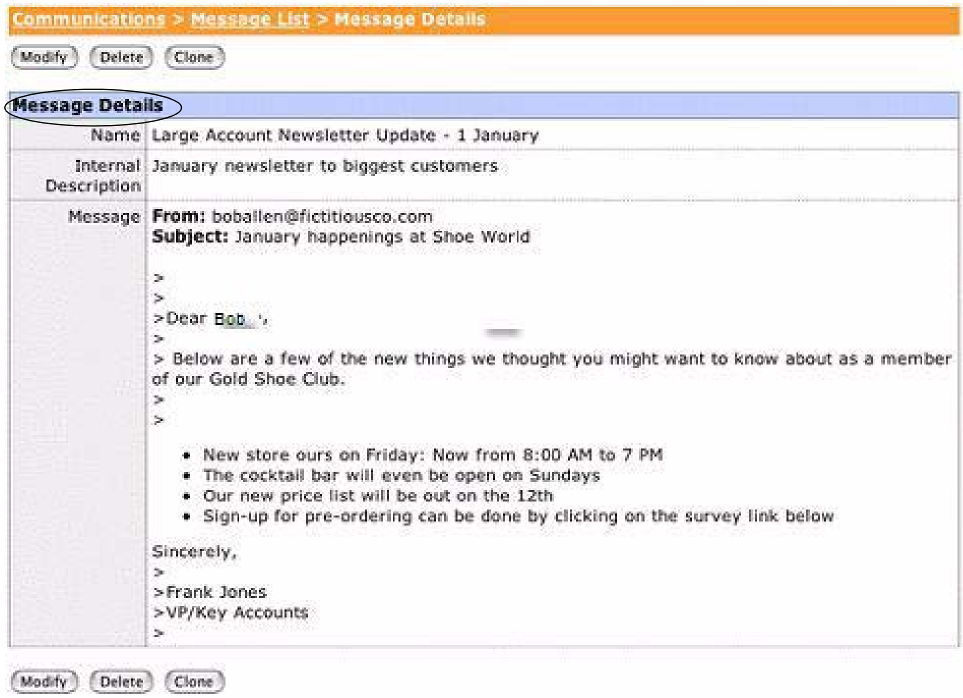


Figure 9.20 Message Details

To add a new message, click the **Add Message** on the Message List page, as shown in **Figure 9.19**. The **New Message** page is displayed as shown in **Figure 9.21**. Specify the name, internal description, and access type of the message. You can select from the following access types:

- **Public**. This option allows everyone to use this message while creating campaigns.
- **Personal**. This option allows only you to use the message.
- **Controlled-Hierarchy**. This option allows you to view only those messages that are owned by you, and the ones owned by your subordinates.

You can compose a message and can also attach documents to the message. For more information on adding attachments, refer to **Section 4.6, "Sending Messages"**.

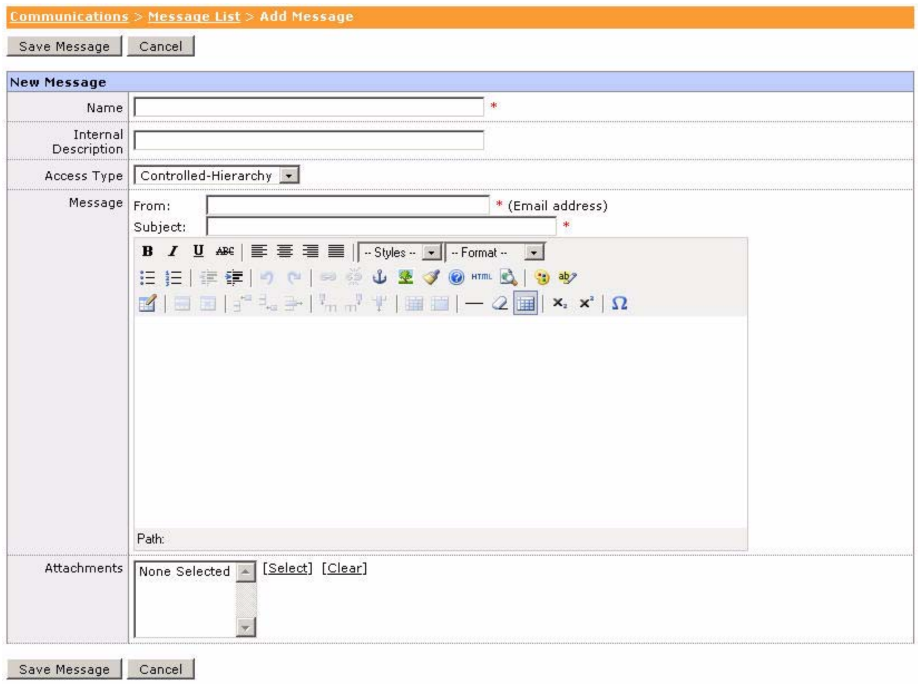


Figure 9.21 New Message Page

Note: You should specify the sender's address in the **From** field. Enter the subject of the message and the content. You can use a multi-featured text/HTML editor to make your message more appealing.

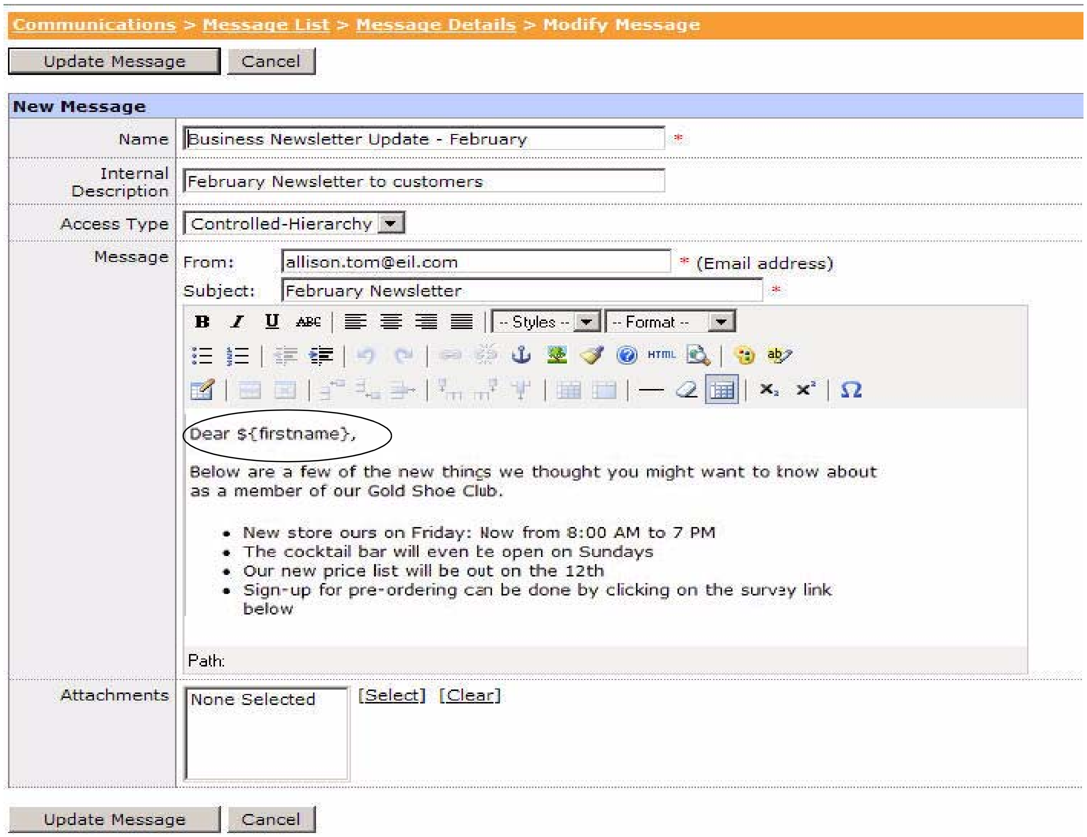


Figure 9.22 Modifying a Message

To personalize your message, you can use some *command* words in the message body, as shown in **Figure 9.22**. When the message is sent to each individual contact, the *command* words are automatically replaced with the contact's details stored in the database. Following are the *command* words you can use:

- `${name}`, which refers to the contact's full name
- `${firstname}`, which refers to the contact's first name
- `${lastname}`, which refers to the contact's last name
- `${department}`, which refers to the contact's department
- `${company}`, which refers to the contact's company

You could, for example, begin your message with "Dear `${name}`," and finish with "Looking forward to further cooperation with "`${company}`". Once you are satisfied with your message, click **Update Message** to save the message and return to the **Message List** page.

9.9 Adding Attachments

You can add campaign attachments to make your campaigns informative and to get your customers more involved. You can attach the following items to the campaign:

- Files

- Address update requests
- Interactive surveys

You can attach files and address update requests to a campaign directly, but you must create drafts to attach surveys.

Click **Create Attachments** on the **Communications** home page or **Attachments** on the module's main menu. The **Create Attachments** page is displayed, as shown in Figure 9.23.

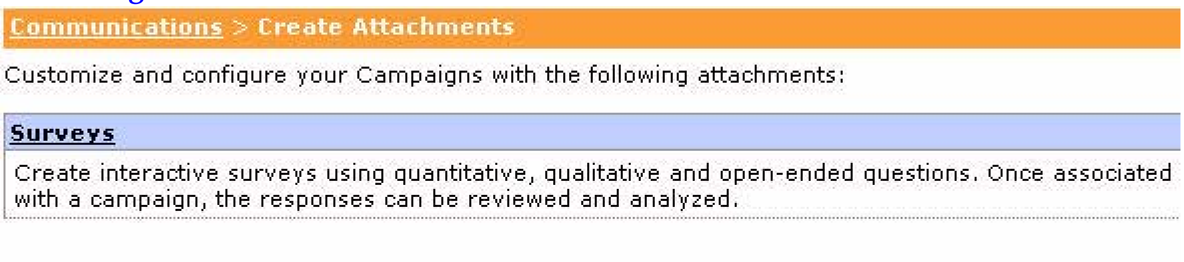


Figure 9.23 Create Attachments Page

The **Surveys** link enables you to access the available survey list, as shown in Figure 9.24.

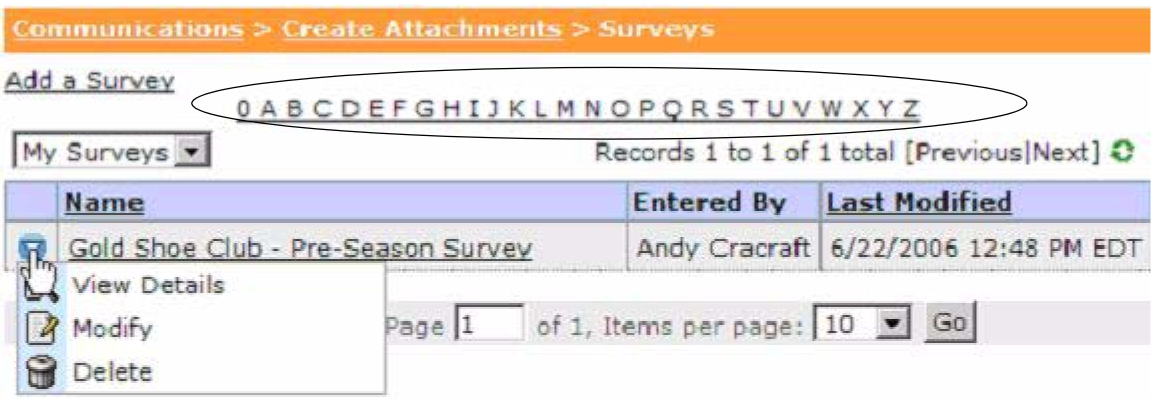


Figure 9.24 Surveys List

When you click a survey name, the survey details page is displayed, as shown in Figure 9.25. The page lists the following information:

- Survey name
- Description
- Creation and modification dates

In the body of the survey, you can view:

- Introduction text
- Questions
- Thank you footer

On the details page, you can perform the following tasks:

- Modify the survey whose details you are viewing
- Delete the survey

- Preview the survey

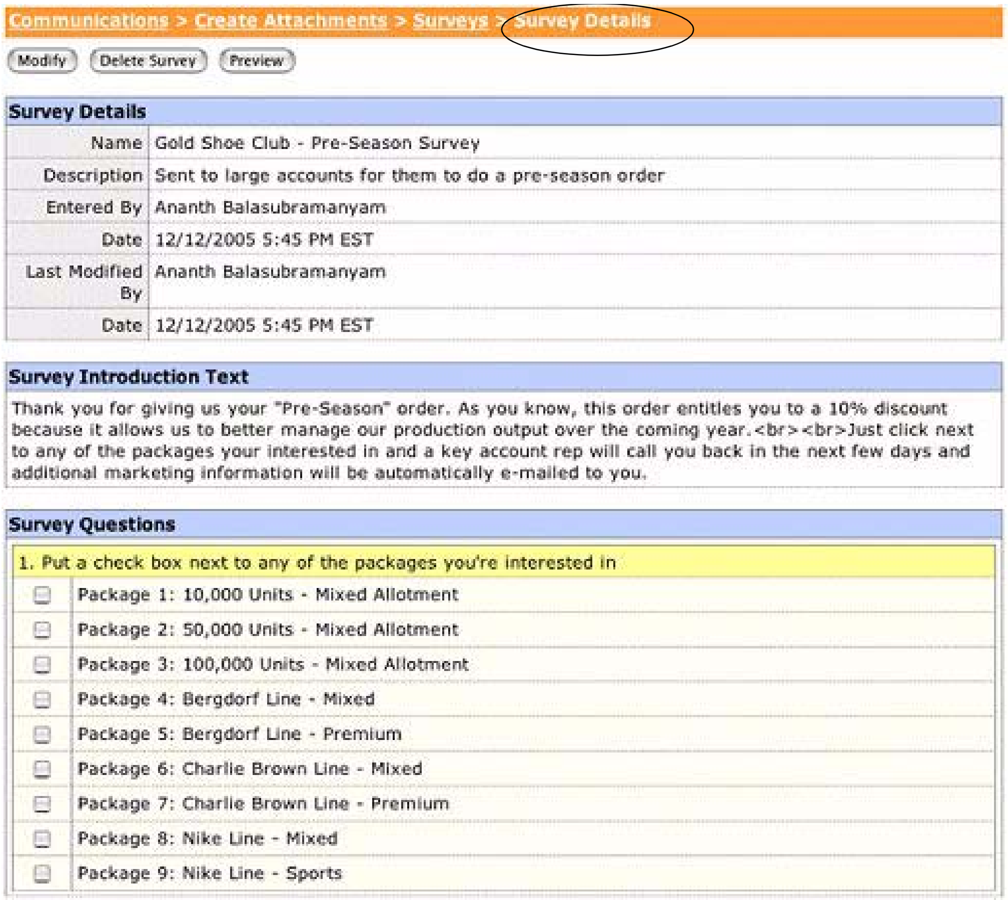


Figure 9.25 Survey Details

To add a new survey, click the **Add a Survey** link. An entry form is displayed, as shown in Figure 9.26. Follow the survey wizard to create your survey, by entering the following details:

- Survey name
- Description
- Introduction text

  This text is displayed when the user clicks the link to take a survey.
- Thank you text

  This text is displayed when the user submits the survey.

Note: Ensure that the introduction text is a concise and catchy introduction to the survey.

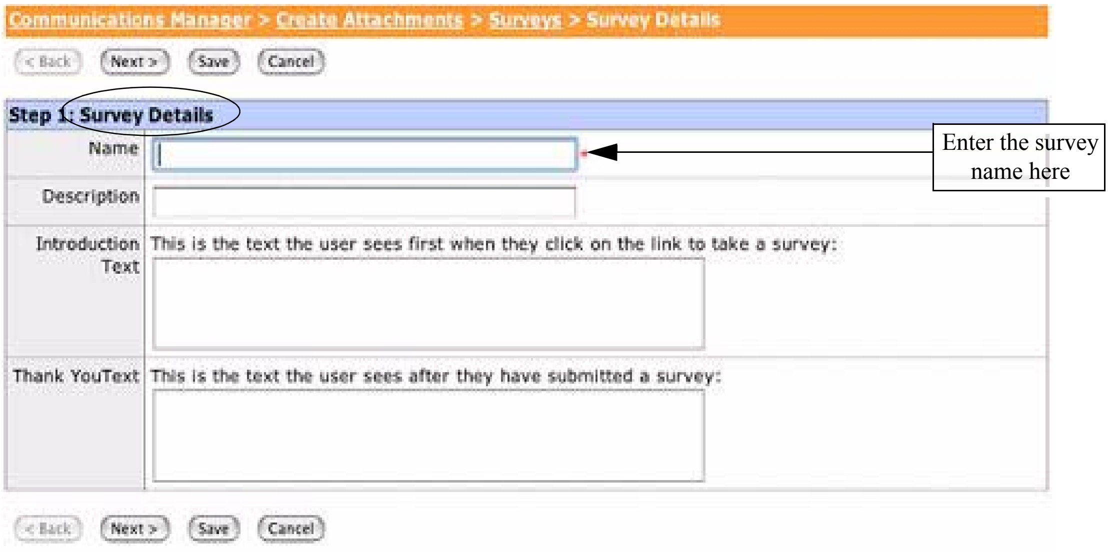


Figure 9.26 **Survey: Adding a Survey**

Clicking **Next** will display a page that enables you to compose your survey, by adding as many questions as you like. The page displayed is shown in Figure 9.27.

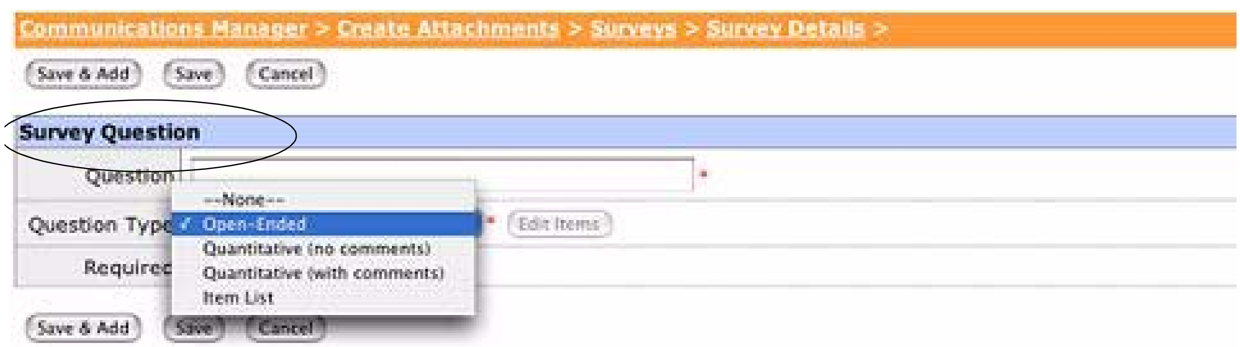


Figure 9.27 **Survey: Adding Questions**

To add a question, click the **Add a Question** link. A question template is displayed. Enter the question and select its type from the Question Type drop-down list, which contains the following options:

- **Open-Ended**. Selecting this option will not have answer choices.

  In the open-ended question type, users taking the survey answer the question in their own words.

- **Quantitative (no comments)**. Selecting this option allows the users to pick one of the available choices as an answer to the question.
- **Quantitative (with comments)**. Selecting this option allows the users to pick one of the available choices as an answer to the question, and make an arbitrary comment.
- **Items List**. Selecting this option allows the users to mark one or more list items as an answer to the question.

Note: The tab **Edit Items** is enabled for the questions in the items list. Use this tab to list all possible answers you provide to a question.

The details of the survey are displayed by clicking **Preview**. The survey details are listed as shown in Figure 9.28.

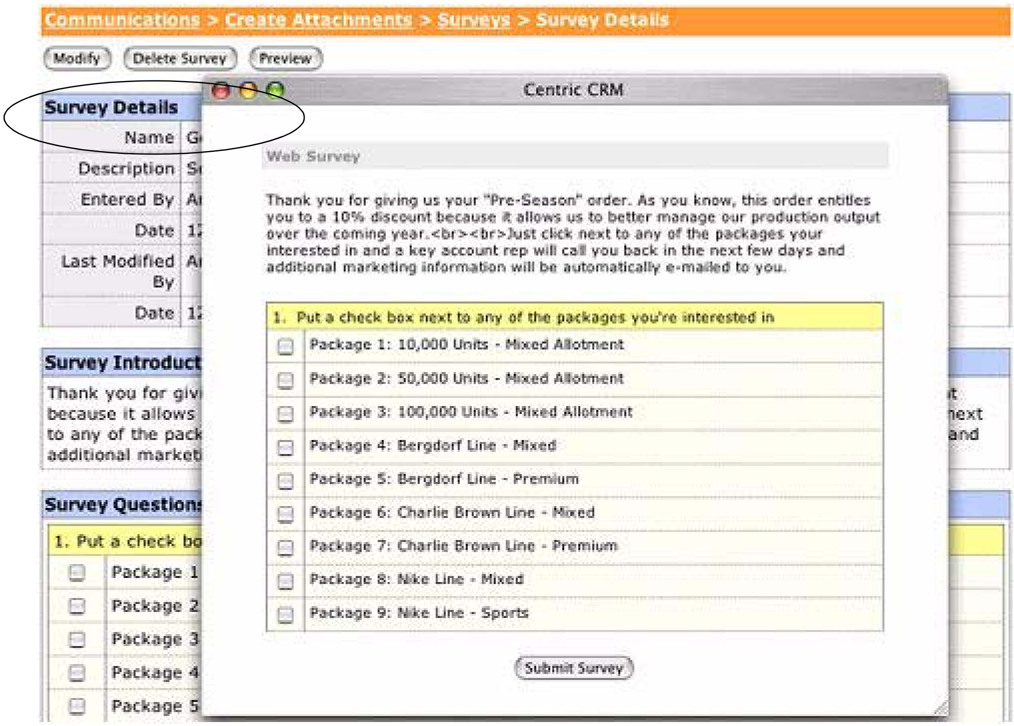


Figure 9.28 Preview a Survey

To modify the survey, go back to the **Survey Details** page. You can also delete the survey and begin a fresh survey.

CHAPTER
10

Managing Projects

This chapter provides information on the **Projects** module of Centric CRM. This module enables individuals and organizations to share information with each other.

This chapter contains the following sections:

- Section 10.1, "How Does This Module Help You?"
- Section 10.2, "Viewing New Projects"
- Section 10.3, "Adding a Project"
- Section 10.4, "Searching for a Project"
- Section 10.5, "Accepting Invitations"

10.1 How Does This Module Help You?

The **Projects** module facilitates communication between an organization and its customers by allowing information to be accessed by all authorized persons, both internally and externally.

Centric CRM **Projects** is a web-based project management application that allows sharing of information with the following personnel:

- Employees
- Clients
- Vendors
- Friends
- Family

The information shared is made easily accessible and secure.

You can create a project by specifying a name, creating news articles, and inviting others to your project. Even if the users are not members of the Centric CRM projects, an email message is sent requesting them to join your project. You can access the **Projects** module by clicking the **Projects** tab, as shown in **Figure 10.1**.

Figure 10.1 Projects Menu Bar

10.2 Viewing New Projects

The following options are available on the menu bar, as shown in Figure 10.1:

- **Dashboard**. This is the default page of the module.
- **List**. This option lists the projects.
- **Add**. This option enables you to add new projects.
- **Search**. This option enables you to search for a particular project.
- **Invitations**. This option lists the project invitations you have received.

The **Dashboard** page is displayed by default when you click the **Projects** tab, as shown in Figure 10.2. This page displays the most recent activity of the projects, you belong to. The default view displays activities of the last 48 hours, but you can select to view activities up to the last 30 days.

A blank list is displayed if there are no activities or projects. If items are displayed, you will view recent activities for the following items:

- Recent news articles
- Recent messages from the discussion forum
- Recent documents that have been submitted
- Pending activities that are assigned to you
- Tickets that are assigned to you, or are unassigned

Click a project to view its details and **Show More** to view more projects.

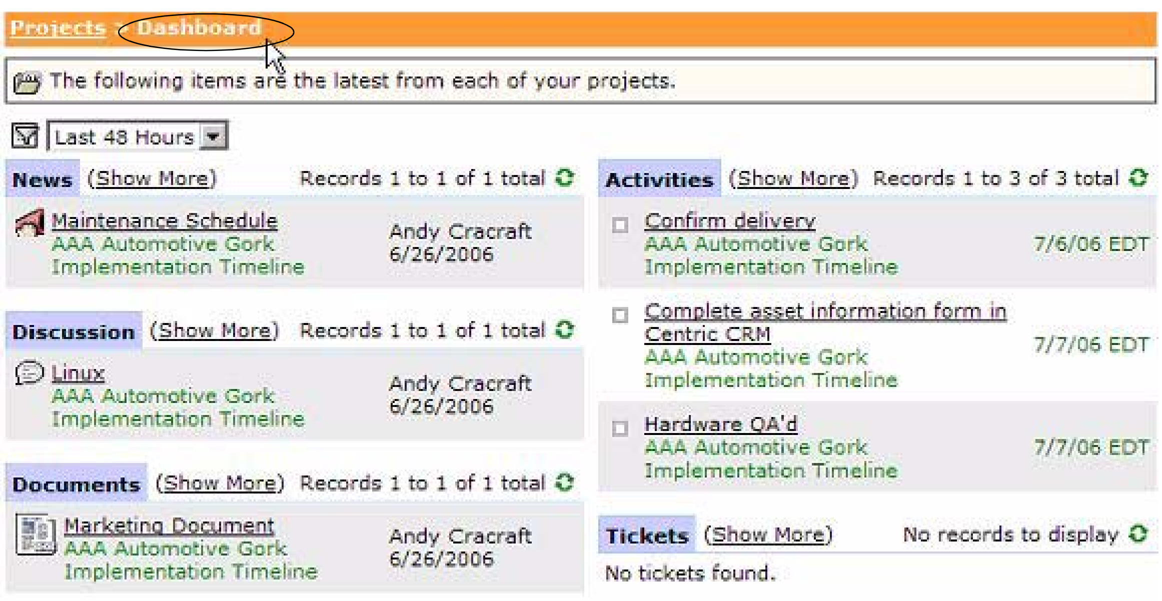


Figure 10.2 Dashboard

10.2.1 Adding News to a Project

News on the **Dashboard** page lists links displaying the subjects of the posted news articles (for example, Maintenance Schedule) and green coloured links displaying the project title, as shown in Figure 10.2. Clicking the project title link, displays the

Project Center page. When you click **News** on this page, a list of news articles will be displayed, as shown in Figure 10.3.

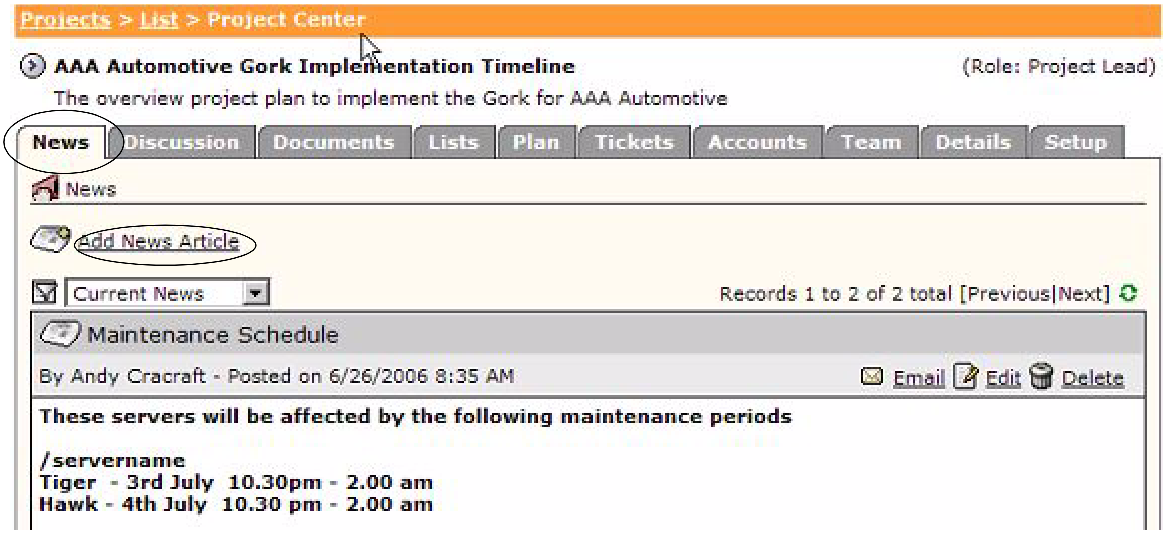


Figure 10.3 News Page

News articles are bits of news that you can add to your project for others to review. Others can also add news items if you provide access to them to do so.

Click **Add News Article**, as shown in Figure 10.3 to add a news article. A form with a set of fields as specified below is displayed, as shown in Figure 10.4.

- **Status**. This field indicates whether the article is displayed when users view news articles. You can select from the following options:
  - **Draft**. Select this option if you have not finished composing the article

    You can finish the article later, but it will be displayed in the current news list. Other users cannot view this article unless they have access to **Draft** articles.
  - **Unapproved**. Select this option if you have completed the article, but would like the article to be approved before allowing others to view it.

    You can view this article in your current news list, but others will not be able to view unless they have access to **Unapproved** articles.
  - **Published**. Select this option if the article is completed, approved, and ready to be viewed by other users.
- **Position**. This field indicates the order of listing of articles.

  Articles are displayed in the list by the most recent date first. If you want certain articles to be displayed before the remaining articles, regardless of their date setting, you can group them by position such that lower numbered articles are displayed before higher numbered articles. By default, 10 is used for all articles, so the articles 1-9 will be displayed before 10.
- **Start Date/Time**. This field indicates the specific date and time at which the article is allowed to be viewed.

  Prior to this time, only users who can view unreleased articles have access to this article. When the start date/time occurs, the article will automatically be displayed in the current news list and the rest of the users in your project, with access to news article list, can view the article.

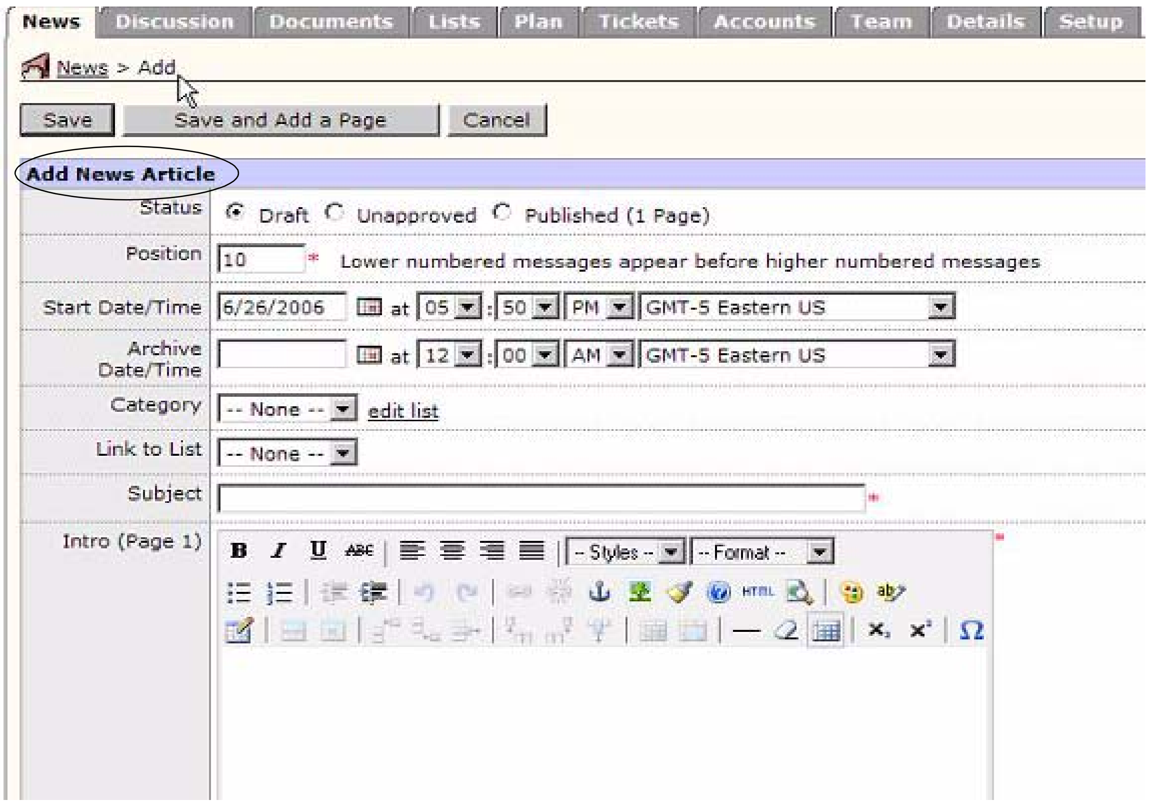


Figure 10.4 Add New Article

- **Archive Date/Time**. This field indicates the specific date and time at which the article should be archived from the default view.

  Users who have access to archived articles will be able to review them.
- **Subject**. This field indicates the headline of the article
- **Intro**. This option displays an introduction to the article

  The user is also given an option to view any additional pages by clicking the **Read more** link that is displayed when an article has additional pages.

After completing the news article and entering all information, click **Save** to save the article. If you wish to add an additional page to the article, click **Save and Add a Page**.

Your article is displayed when you click the **News** tab in your project.

10.2.2 Adding Forums

While news articles provide access to information on projects, discussion groups allow informal exchange of information.

Click **Discussion** on the **Project Center** page to view forums for discussing projects.

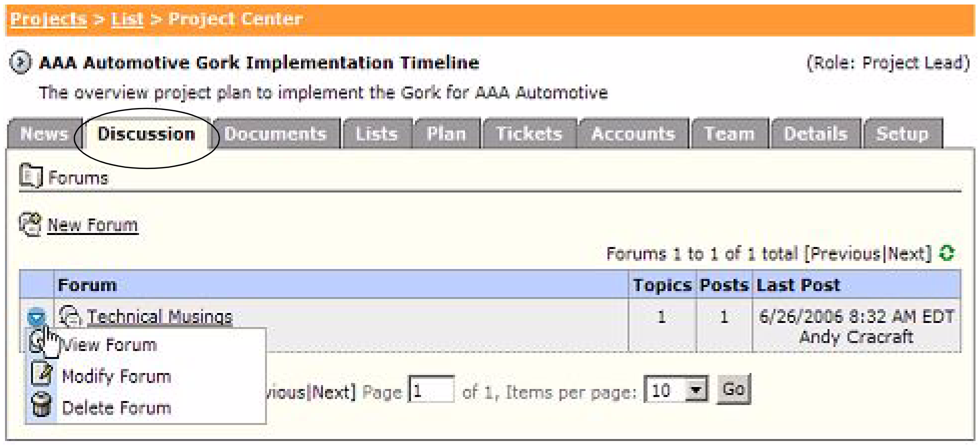


Figure 10.5 Discussion Page

Discussion groups contain forums, topics, and messages.

Forums provide categorization of the topics being discussed. For example, you can have forums for suggestions, status reports, or resources. Depending on the size of the project, there may be a number of forums. To view a discussion forum, click **View Forum** from the options. You can also modify or delete it, as shown in **Figure 10.5**.

Once a forum has been created, you need to create a topic for discussion. A topic consists of a subject and a message. Forums may have multiple topics. Click **New Forum** to start a new discussion forum and **New Topic** to add new topic under a particular forum. Once a topic has been posted, other team members can reply by clicking **Post Reply**, as shown in **Figure 10.6**.

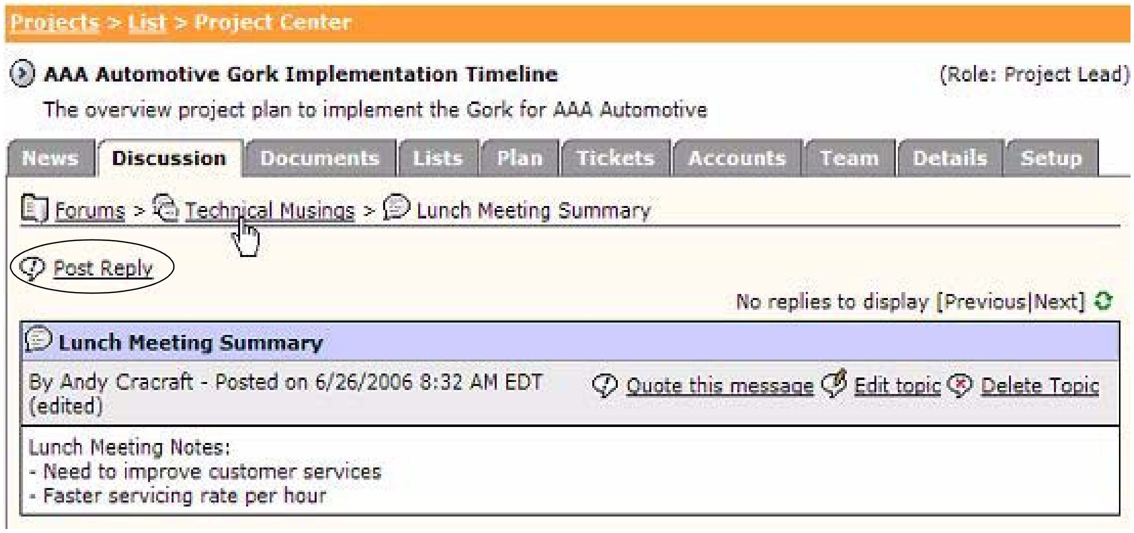


Figure 10.6 Discussion Forum Details

10.2.3 Managing Documents

The **Projects** module provides its users with a sophisticated document management tool. This feature enables you to store different versions of documents in a hierarchy of folders. Click the **Documents** tab on the **Projects Center** page to view a list of folders and files that belong to a project, as shown in Figure 10.7.

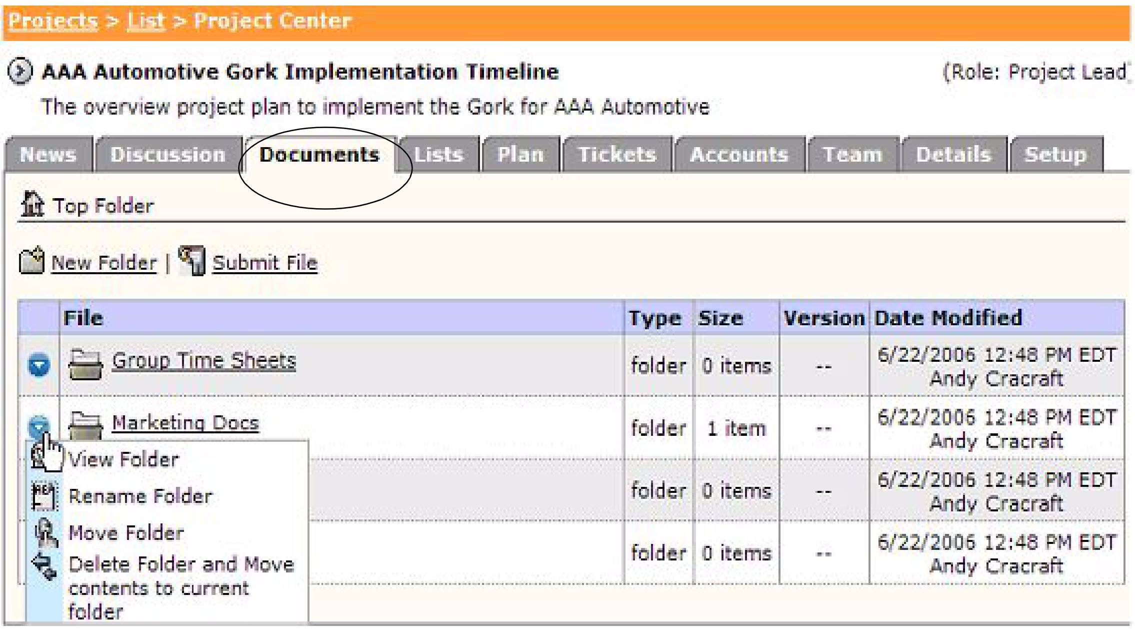


Figure 10.7 Documents Page

To create a folder, click **New Folder** and to store a file, click **Submit File**. While uploading a file, enter a subject for the file that gets displayed in the list. You can store documents at the top level, or navigate into any available folder and store a file there.

Files existing in the document library, are displayed in the list.

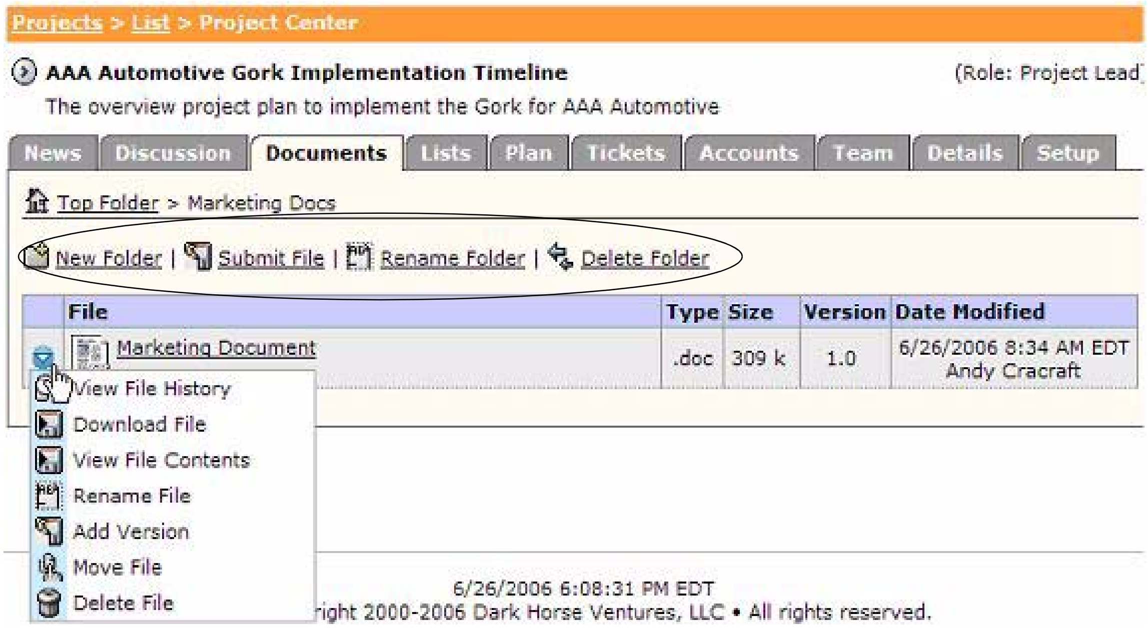


Figure 10.8 File Operations

Clicking the action icon, displays a context menu with the following options, as shown in **Figure 10.8**:

- **View File History**. This option displays the versions that exist for a file and the number of times each version has been downloaded
- **Download File**. This option enables you to download files to your computer
- **View File Contents**. Selecting this option displays the files in a pop-up window.

  Files of following types will be displayed:
  - PDF
  - Excel
  - HTML
  - Text
  - Word
- **Rename File**. This option enables you to rename a file
- **Add Version**. This option enables you to upload a new version of an existing document.

  The existing file will not be altered, and can be downloaded or deleted separately. Version numbers are indicated as specified below:
  - **Major**. This option indicates that a substantial amount of content has been added or modified
  - **Minor**. This option indicates that some amount of content has been added or modified
  - **Changes**. This option indicates that small amount of content has been added or modified

- **Move File**. This option allows you to move the file to another folder.
- **Delete File**. This file enables you to deletes the file and all versions of the file.

  To delete only the version of the file, click **View File History** for additional options.

  In this history page, you can perform the following tasks:

  - Add a new folder
  - Submit a file to a folder
  - Rename a folder
  - Delete a folder

10.2.4 Viewing Lists

Lists allows you to place items in a list. that can be marked incomplete or complete. You can jot down related items to be referenced later.

Projects can contain any number of lists and each list can contain any number of items. An item on the list can also contain a memo area.

Figure 10.9 Lists Page

Click **List** on the **Project Center** page or the menu bar to view the lists page, as shown in Figure 10.9. Click **New List** located at the top of the page to add a new list.

10.2.5 Adding Plans

Plans helps in creating a high-level view of project objectives as well as providing low-level details. Click the **Plan** tab from the **Project Center** page or **Activities** from the dashboard page. You always start the plan with an outline.

Outlines is used to organize objectives for the project. Click **New Outline** to create an outline. A page with the following details is displayed, as shown in Figure 10.11:

- **Title**. This field describes the project objective
- **Details**. A text describing the goals of the outline is displayed.

  The outline may contain activities and assignments.

- **Requested by**. This field indicates the person who might have initiated the plan.
- **Department or Company**. This field indicates the name of the organization that might have initiated the plan.
- **Expected Dates**. This field indicates the date on which the plan is expected to begin and the date on which it is expected to be completed.
- **Level of Effort**. This field indicates an estimated time for completion of the objective, and the actual time taken for completion.
- **Status**. This field indicates whether the outline is approved and/or closed (complete).

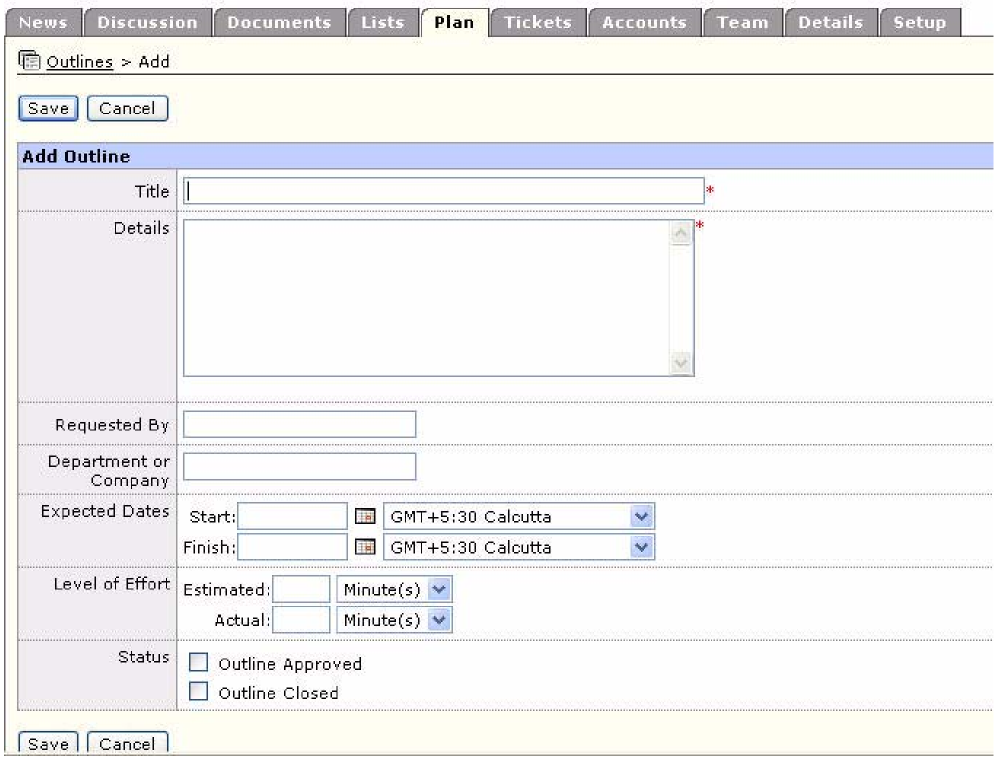


Figure 10.10 Creating a New outline

After entering all the fields, click **Save** to save the outline.

Once you have created the outline, an item in the list with a progress of zero (0) activities is displayed.

Clicking the action icon displays the context menu. You can view the outline details by clicking **View Outline Details** from this menu, or by clicking the name of the outline in the list, as shown in **Figure 10.11**.

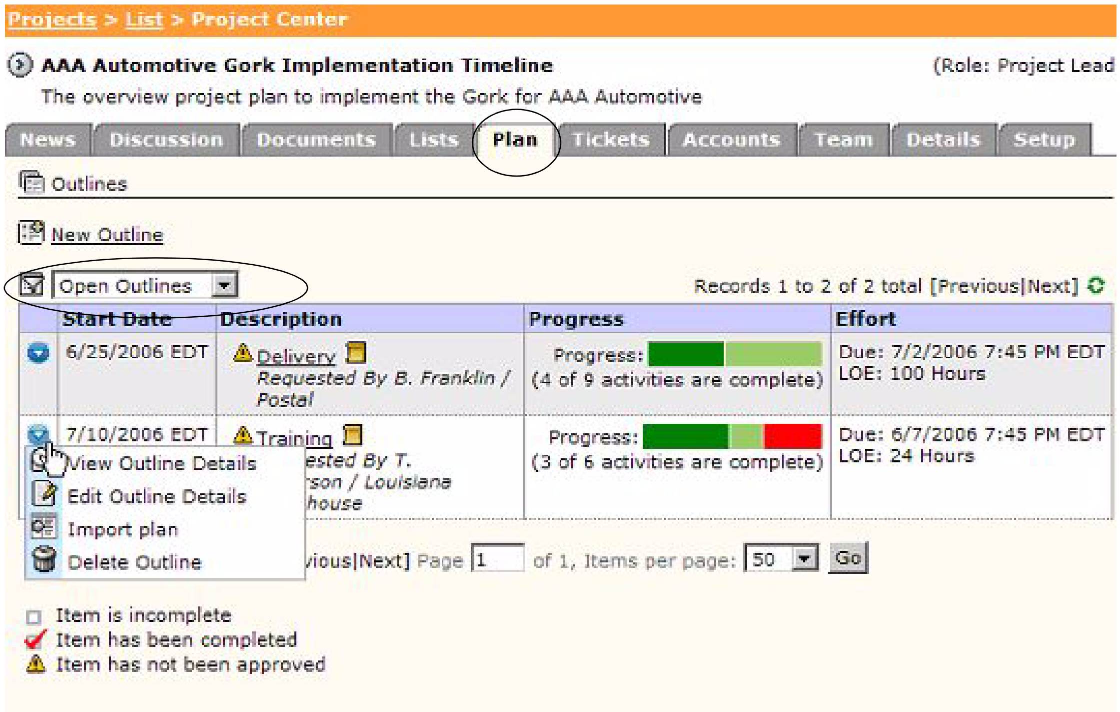


Figure 10.11 Plan Outline

The **Plan Outline** page is displayed. You can add an activity by clicking **Add Activity Folder** or **Add Activity**.

Clicking the name of the outline displays a context menu which will provide you with the following options:

- View Outline Details
- Add Activity Folder
- Add Activity

An activity folder allows you to create sections in your outline, as shown in Figure 10.12. This is useful while building an outline without deciding how to group activities.

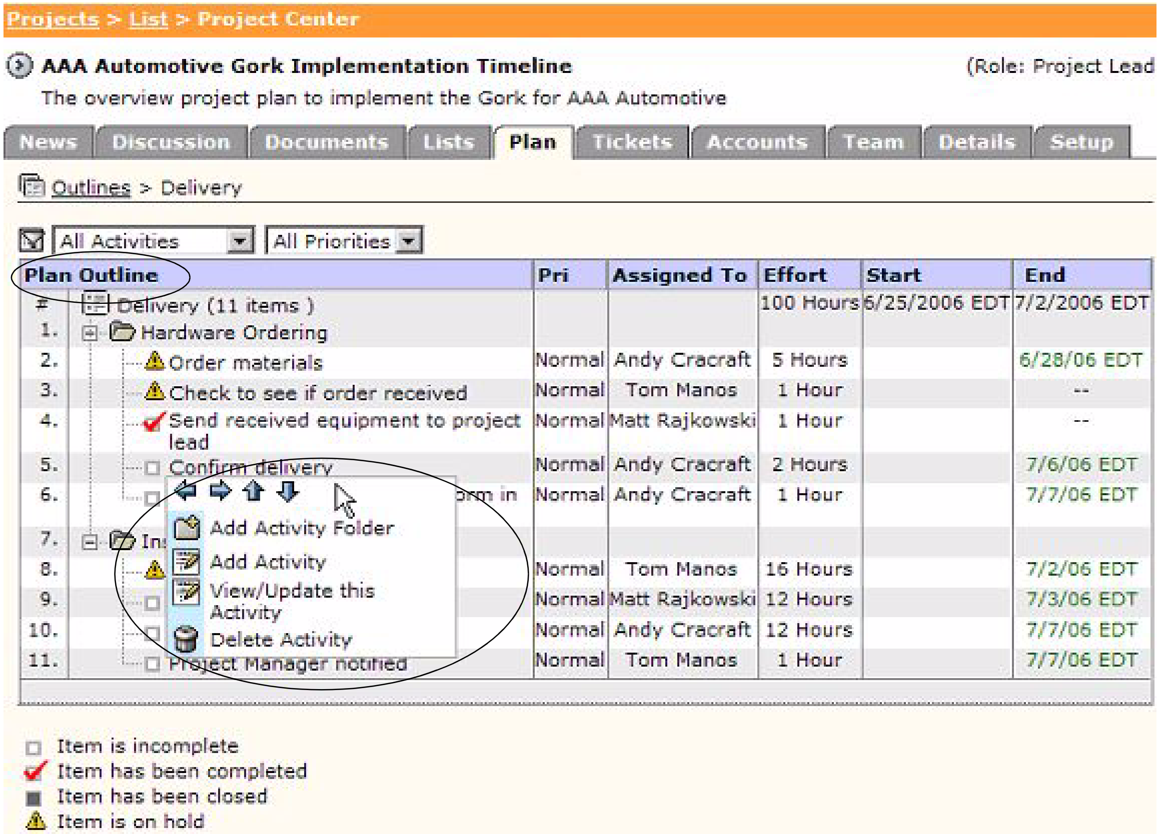


Figure 10.12 Plan Outliner

10.2.5.1 Adding Activities

Clicking **Add an Activity**, displays a pop-up window, as shown in **Figure 10.13**, wherein you can enter the following details:

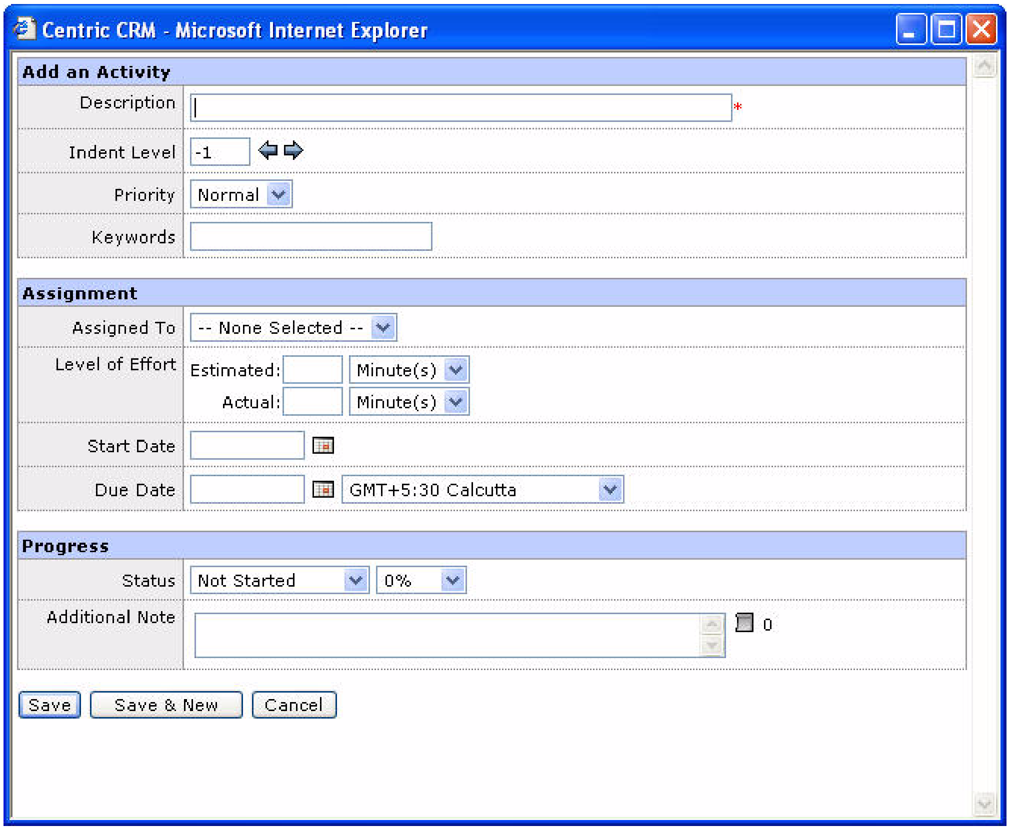


Figure 10.13 Add an Activity Window

- **Add an Activity**
  - **Description**. A brief description which indicates a specific task that needs to be completed
  - **Indent Level**. This field indicates the level of items

    As the outline is hierarchical, each item on the outline can be moved to the left or right.
  - **Priority**. The importance of this activity can be specified from the following options:
    - Low
    - Normal, which is the default
    - High
  - **Keywords**. This option contains additional words to track activities.
- Assignment

  The **Assignments** section enables you to enter the following details:
  - **Assigned to**. This option enables you to assign an activity to any member of the project.
  - **Level of Effort**. This field indicates the estimated time taken for this activity to be completed and the actual time taken for completion of the activity.

  - **Start Date**. This field indicates the date on which this activity began.
  - **Due Date**. This field indicates the date by which this activity is to be completed.
- Progress

  The **Progress** section indicates the status of the activity. **Status** describes the state of this activity from the following options:

  - **Not Started** - indicates that this activity has not yet started
  - **In Progress** - indicates that this activity has started, but is still in progress
  - **Complete** - indicates that the activity is complete
  - **Closed** - which is used when the activity is not completed, but the activity may no longer be necessary
  - **On Hold** - which indicates that this activity is waiting on some other factor
  - **Waiting on Requirements** -which indicates that more information is needed in order to complete this activity

When all information on the activity has been recorded, select **Save** or **Save & New**.

Save will record the activity and refresh the outline. **Save & New** will record the activity, refresh the outline, and provide another form to continue adding activities.

Once an activity is added to the list, you can select from the following options:

- **Add Activity Folder**. This option enables you to add an activity folder below the activity.
- **Add Activity**. This option enables you to add another activity below the existing one.
- **View/Update this Activity**. This option enables you to modify the activity depending on your permissions, and whether the activity is assigned to you.

  Otherwise you are allowed to view the activity without making any changes.
- **Delete Activity**. This option enables you to delete the activity.

You also have the option of moving the activity item up and down the list, or indenting the activity to the left and right.

10.2.6 Adding Tickets

Once the project starts, there might be some unexpected issues that need to be recorded and resolved. The **Tickets** tab helps you capture these issues.

Tickets indicates issues that can be assigned to a team member. A list of tickets associated with a project is shown in **Figure 10.14**.

Click **New Ticket** on the **Project Center** page to add a new ticket.

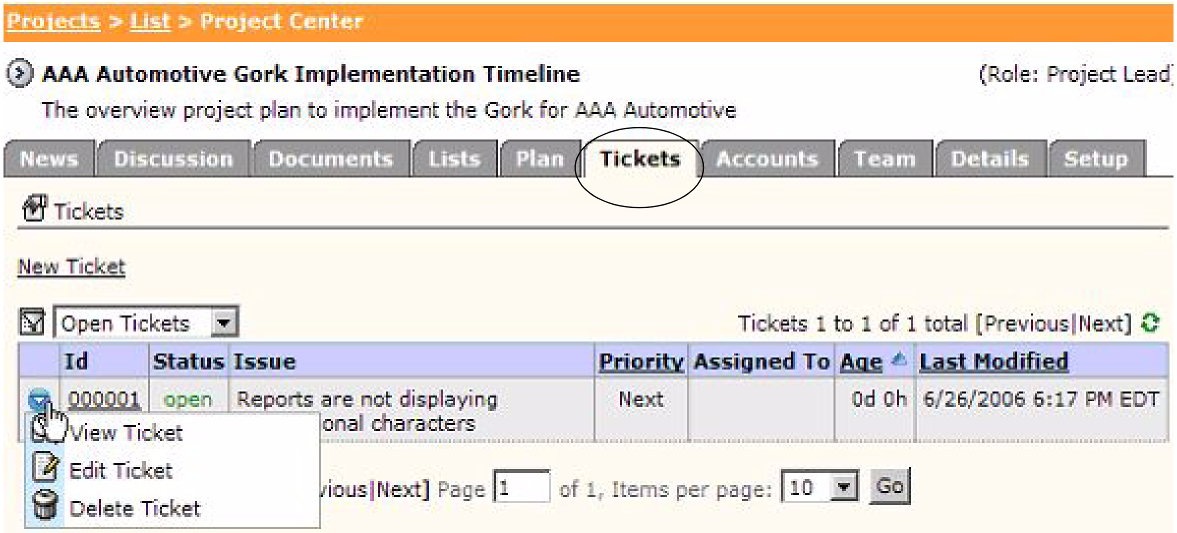


Figure 10.14 Tickets Page

A new page is displayed, as shown in Figure 10.15.

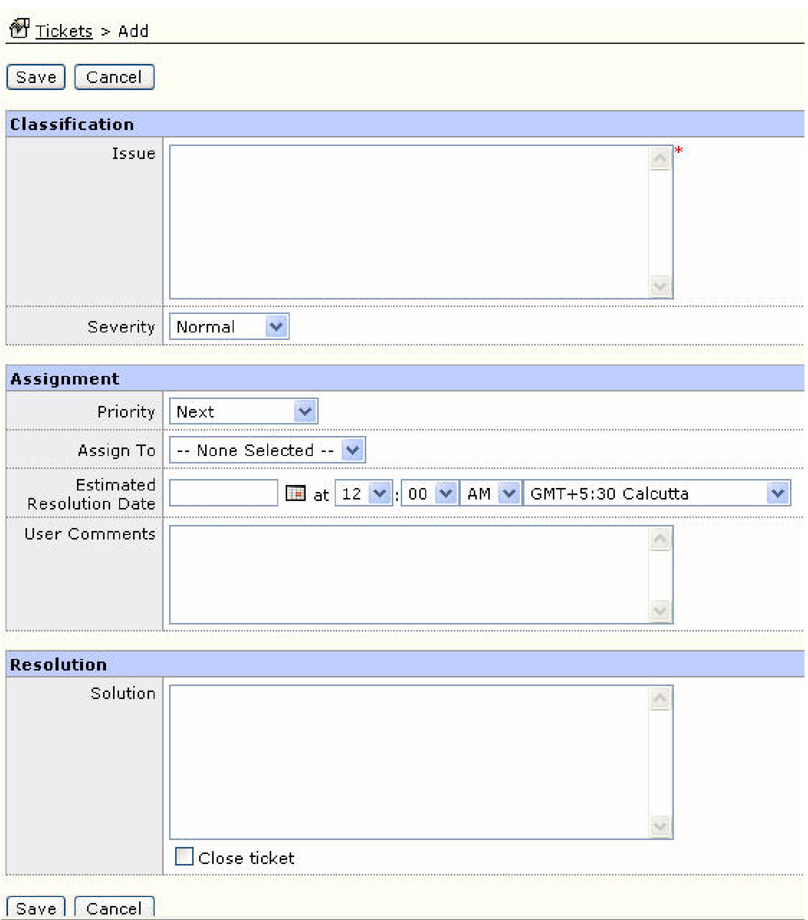


Figure 10.15 Add Ticket Page

The information to be entered on this page can be divided into the following three sections, which are described in detail:

- Classifications
- Assignment
- Resolution

10.2.6.1 Setting Classifications

The **Classifications** section indicates any issue that has come up. The issue can be a request for information or a problem that has occurred.

The severity of the issue, which describes the impact on the project, can be selected from the following options:

- Normal
- Important
- Critical

10.2.6.2 Adding Assignments

The **Assignments** tab indicates the date by when the issue is to be resolved. You can select from the following options:

- **Scheduled**. This option enables the team member assigned to take care of the issue whenever convenient
- **Next**. This option enables the team member assigned to take care of this issue ahead of other lower priority items
- **Immediate**. This option enables the team member assigned to take care of this issue immediately because the impact is severe

You may enter the following information:

- **Assign To**. This field displays the team member who has been assigned this ticket
- **User Comments**. This field displays any additional comments that are not part of the issue

  A ticket can have any number of comments. Each comment is dated and attributed to the user who made a comment and is later displayed in the ticket history.
- **Estimated Resolution Date**. This field displays the date by which this issue is expected to be resolved

10.2.6.3 Adding Resolution

The **Resolution** tab displays the solution to the ticket. The solution is a description of how the ticket was resolved.

10.2.6.4 Closing a Ticket

You can check the **Close Ticket** checkbox located at the bottom, as shown in **Figure 10.15**. This indicates that the ticket is complete and needs no further action.

Once a ticket has been added, its details can be reviewed. A ticket also contains a history in which you can view the progress or escalation that has occurred with the ticket.

Once a ticket has been closed, you can re-open the ticket later, if necessary.

10.2.7 Organizing Teams

After configuring the project and adding news article, you need to add contacts to your projects.

Click the **Team** tab. The **Team** page is displayed, as shown in **Figure 10.16**. The first page will display a list of currently added team members and some information about them. Your name will be added automatically when you create a new project.

To add team members, click the **Modify Team** link. The **Modify Team** page is displayed, as shown in **Figure 10.17**.

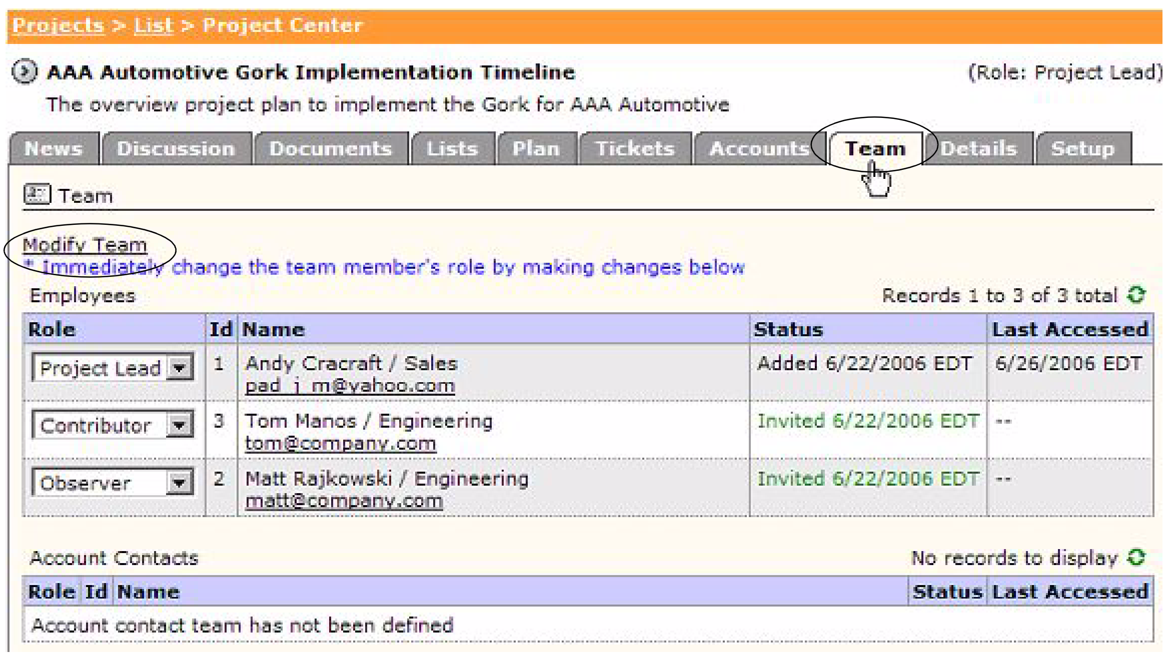


Figure 10.16 Teams Page

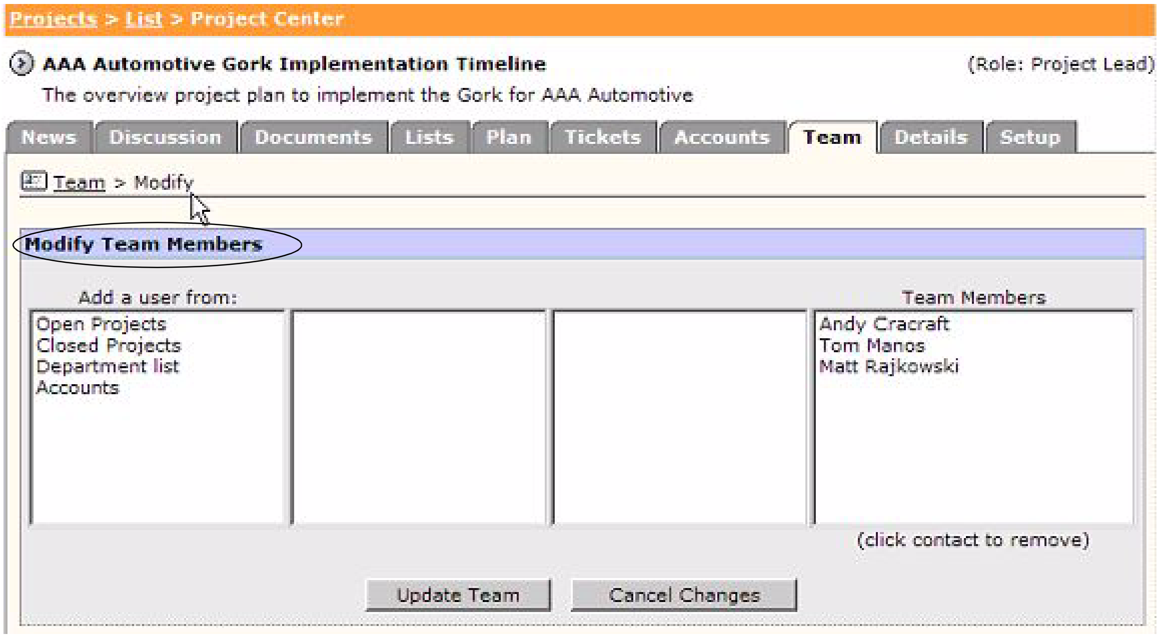


Figure 10.17 Modify Team

A page with list boxes, some of which are empty, is displayed. The list on the extreme right shows you the team members of your project. The list on the far left displays channels through which you can add team members.

Note: For more information on this feature, refer to **Section 12.5.2, "Viewing Team Page"**.

All added team members are initially identified as Invited. This indicates that you want them to be on this project, but want them to inform you of this action. You want the team members to login to Centric CRM **Projects** to accept the invitation. If the team members do not have an account, they will receive an email that allows them to register with Centric CRM **Projects** before accepting your invitation.

Team members can be added from the following projects:

- **Open Projects**. This option enables you to add contacts from your existing projects.
- **Closed Projects**. This option enables you to add contacts from your closed projects.
- **Email address**. This option enables you to invite the contacts by their email address if they are not listed in any of your projects.

You will be asked either to select a project from which you want to invite a contact, or enter an email address. After selecting a contact, ensure the selected contact is displayed in the list on the right side before continuing. To remove team members from your project, select the contacts from the right column and they will be removed when the team is updated.

After modifying the team, click **Update Team** to commit the changes. If you have added a contact by email address, and Centric CRM **Projects** is not familiar with that address, you will be asked if you are certain you would like to invite them to the project. If you select **Yes**, you must enter their first and last names.

When contacts are added to a project, whether they are users of Centric CRM or not, an email will be sent to each contact inviting them to your project. When you view the list of users, you can modify their role in the project by selecting from the options next to their names. The system immediately updates the user's role after modifying the same.

10.2.8 Viewing Details

The **Details** tab displays the details of a project, as shown in **Figure 10.18**.

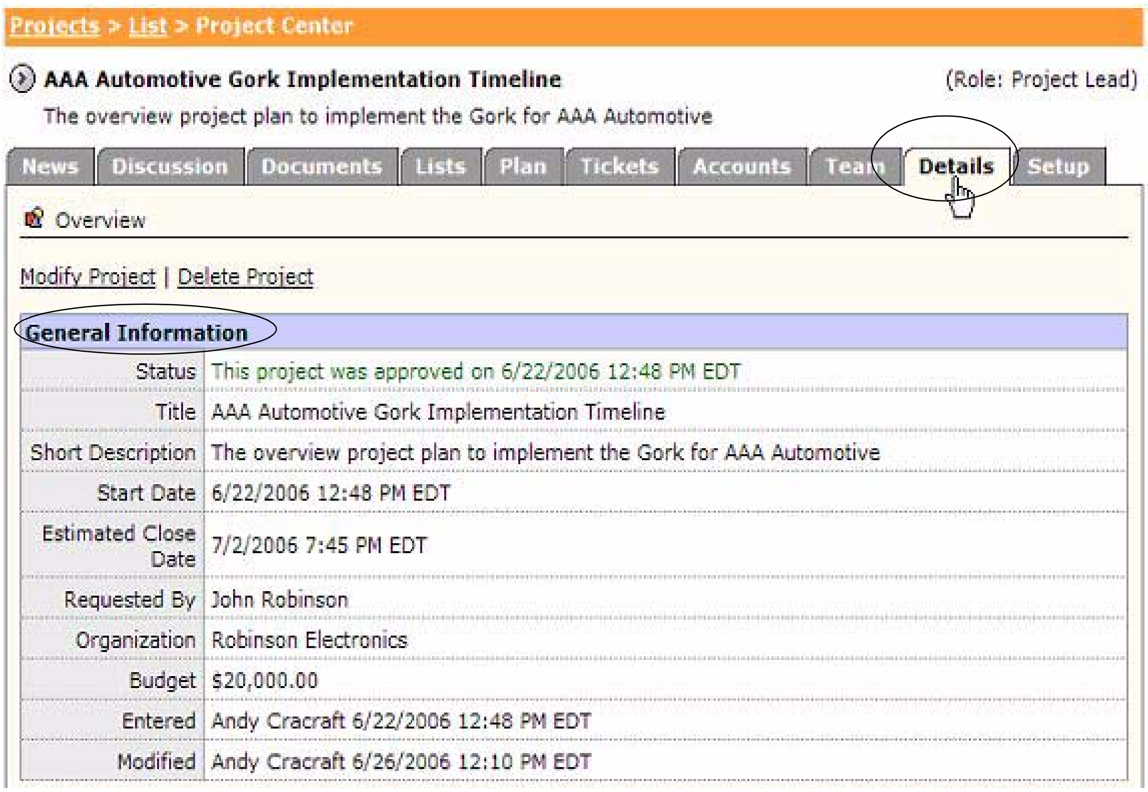


Figure 10.18 Details Page

The following fields are displayed:

- **Status**. This field indicates whether the project is pending for approval or cleared.
- **Title**. This field displays the name of the project.
- **Short Description.** This field displays a brief description of the project.
- **Start Date**. This field displays the date on which the project began.
- **Estimated Close Date**. This field displays the date by which the project is expected to close.
- **Requested by**. This field displays the name of the person who requested this project.

- **Organization**. This field displays the name of the organization to which the person who requested this project belongs.
- **Budget**.This field indicates the monetary funds set aside for the project.
- **Last Date of Entry and Modification**

You can choose to modify some details of this project or delete entirely. When you click **Modify**, you will be navigated to a form that allows you to change the project data.

After the necessary modifications have been made, click **Update** to save the changes or **Cancel** to return to the previous screen.

10.2.9 Managing the Setup

As the project lead, you have access to the **Setup** tab. By clicking **Setup** you can configure some of the administrative tasks associated with this project. The following links are displayed under the **Setup** tab:

- **Customize Project**
- **Configure Permissions**

In **Customize Project**, if you are a leader of this project, you can decide which tabs are needed for the project and what the tabs should be called. Changing the names of the tabs does not change any of the existing functionality for that tab. Turning off the tabs can be helpful if you do not intend to have any information under that tab.

If you want to leave the tabs with their default settings, click **Cancel**.

10.2.10 Setting Up Project Permissions

Within the **Setup** tab, you also have the choice to configure permissions for a project. Permissions allow you to define what members of your project can be allowed to view, add, change, or delete. When you add users to your project, you need to decide which part of the project will each user can access.

Projects has pre-configured a few types of users, called roles. Each role has a different set of permissions. The roles are as shown in **Figure 10.19**. The roles and their definitions are specified below:

- **Project Lead**. The owner or manager of the project and has control of the project data.

  The project lead is allowed to configure the project and add, update, and delete project information. There can be multiple owners or managers for a project.
- **Contributor**. The person responsible for adding or updating project information.
- **Observer**. The person who is allowed to review the project.

  The observer has read access and is allowed to add or update project-related information.
- **Guest**. A user who has a read-only role.

A guest is a person who is not directly part of the project, but can view some of the project information.

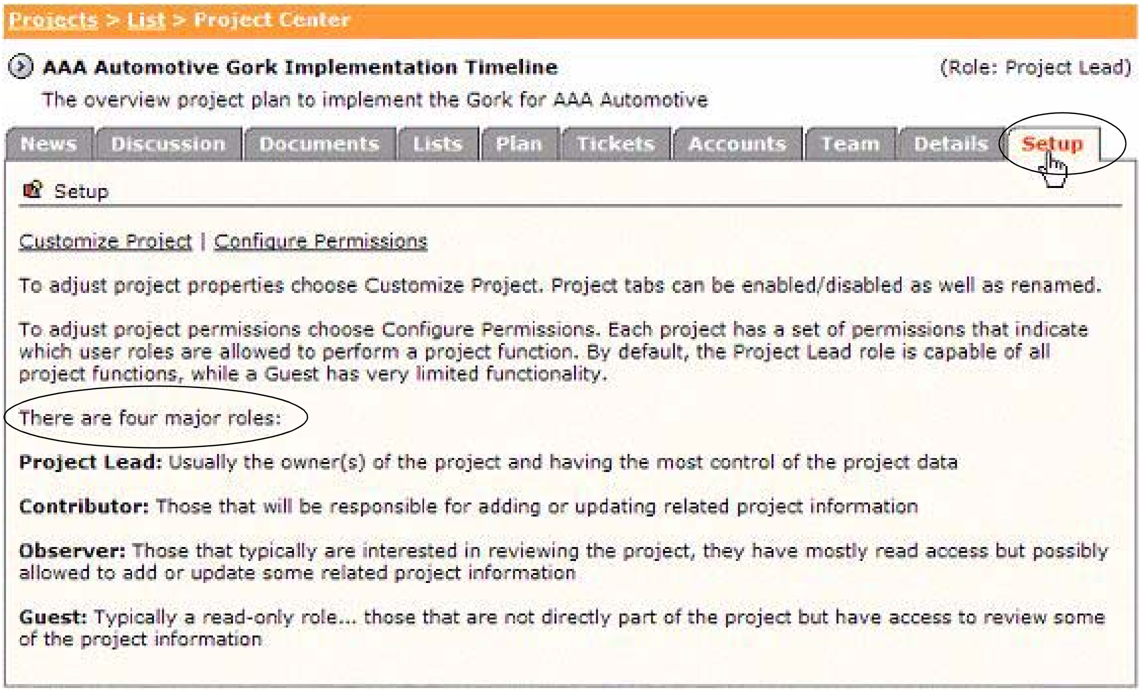


Figure 10.19 File Setup

Note: Every user added to the project is assigned a role and is provided certain capabilities within the project.

10.2.11 Configuring Permissions

A list of all permissions that can be adjusted in your project is shown in **Figure 10.20**. Each tab has a variety of permissions that can be adjusted.

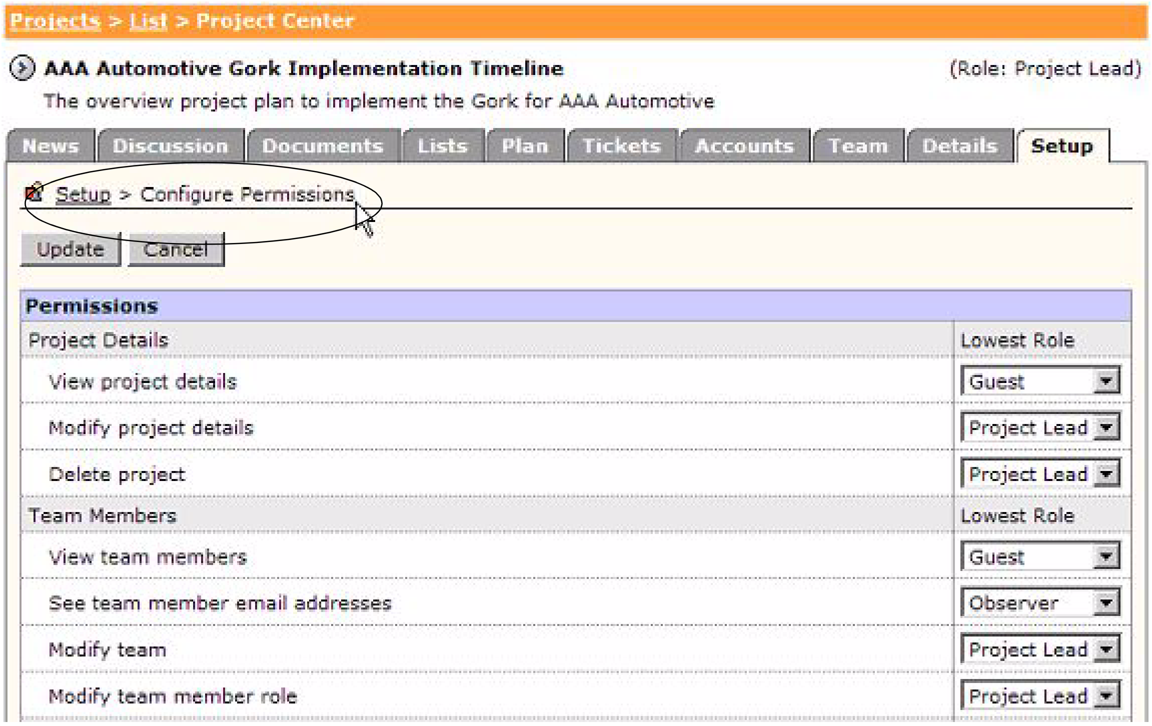


Figure 10.20 **Project Permissions**

For example, the first group **Project Details** contains the following permissions that can be adjusted:

- **View project details** - defines which role can view the project details
- **Modify project details** - defines which role can modify the project details
- **Delete project** - defines which role can permanently delete a project

---

Note: Avoid further configuration and make use of defaults until you have understood the permissions of each project tab well.

10.3 Adding a Project

Clicking the link **List** from the menu bar, displays the **List** page, as shown in **Figure 10.21**, with a list of all your projects for review.

Figure 10.21 List Page

You can start a new project by clicking **Start a Project** on the **List** page or the **Add** link on the menu bar. The **Add** page is displayed, as shown in Figure 10.22

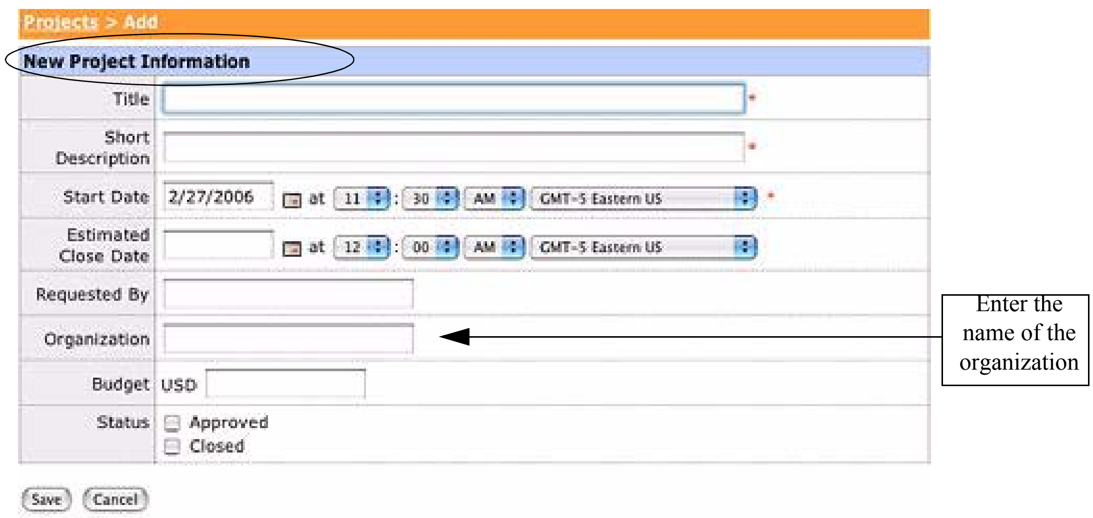


Figure 10.22 Add Project

Enter your new project information in the following fields:

- **Title**. This field refers to a brief name for your project
- **Short Description**. This field refers to a brief description of your project
- **Start Date**. This field refers to the date on which the project started or will start
- **Estimated Close Date**. This field refers to the date on which you intend to finish the project
- **Requested By**. This field which refers to the person who might have initiated the project

  It could be the name of a client.
- **Organization**. This field refers to the organization that might have initiated the project

  It could be the name of a company.
- **Budget**. This field refers to a high-level view of the project budget

  This figure generally is an estimate.
- **Status**. This field displays whether the project has been approved or closed (finished)

After the details have been entered, click **Save**. The new project is created. The Project Center page is displayed, as shown in Figure 10.23. This page displays information about your new project.

Initially, you are the only member of the project, and no one else has access to it. You can then configure the project and enter additional project information.

Figure 10.23 Project Center Page

10.4 Searching for a Project

Click **Search** from the menu bar to search for a particular project, as shown in Figure 10.24.

Figure 10.24 Search Project Data

The **Scope** field provides the following options to broaden or narrow down your search:

- All Project Data
- Discussion
- Documents
- Lists
- Tickets
- Plan
- Details

If you select **All Project Data**, a complete list of all projects is displayed. Clicking **Search**, displays the **Search Results** page, as shown in Figure 10.25.

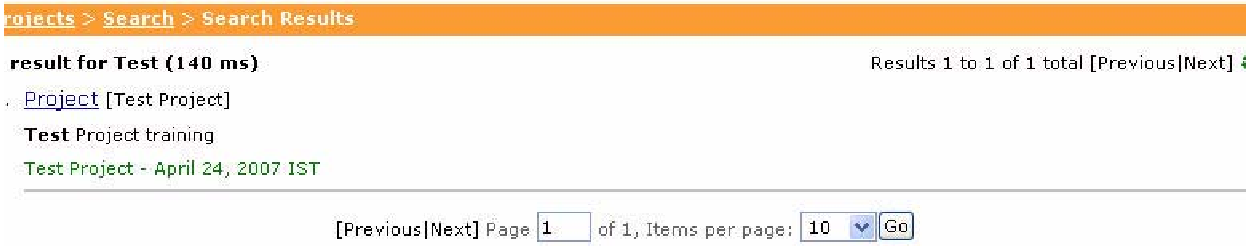


Figure 10.25 Search Results Page

10.5 Accepting Invitations

Projects module hosts projects for a large number of users. If you are invited to a project, you will receive a message by email allowing you to accept or reject the invitation.

You can view your pending invitations by clicking **Invitations** from the menu bar. This link also shows any unanswered invitations by displaying the number of invitations in parentheses after the link.

When you have invitations, the list displays each project to which you have been invited, as well as the person who invited you. Click **Accept** to join the project, or **Reject** to reject the invitation. You can view the project in detail only after accepting to join the project.

10.5.1 Closing a Project

When you want to close the project, click the **Details** tab and modify the project. Indicate the status as **Closed**. For more information on accessing the **Details** tab, refer to **"Viewing Details"**. A closed project can be re-opened if necessary, but the closed project will be removed from the project list. If you want to view closed projects, click **Closed Projects** in your list.

CHAPTER
11

Accessing the Help Desk

This chapter provides information on the **Help Desk** module of Centric CRM. This module helps you in solving customer problems in the form of trouble tickets.

This chapter contains the following sections:

- **Section 11.1, "How Does This Module Help You?"**
- **Section 11.2, "Viewing the Help Desk Page"**
- **Section 11.4, "Viewing Ticket Details"**
- **Section 11.3, "Creating a New Ticket"**
- **Section 11.5, "Searching for a Ticket"**
- **Section 11.6, "Adding Defects"**
- **Section 11.7, "Understanding Knowledge Base"**

11.1 How Does This Module Help You?

Help Desk module is a web-based trouble ticketing, and issue tracking system that enables individuals and organizations to track internal problems, or customer problems and requests. You can use it to store information about a customer issue that needs to be assigned to the concerned person for action, and tracked to completion.

It is designed for technical support, but is also useful in marketing, sales, and business development situations. With the Portal Interface, customers can even enter and view their own information.

11.2 Viewing the Help Desk Page

The **Help Desk** page can be accessed by clicking the **Help Desk** tab. The Help Desk menu bar is displayed, as shown in **Figure 11.1**. By default the **View Tickets** page is also displayed.

Figure 11.1 Help Desk Menu Bar

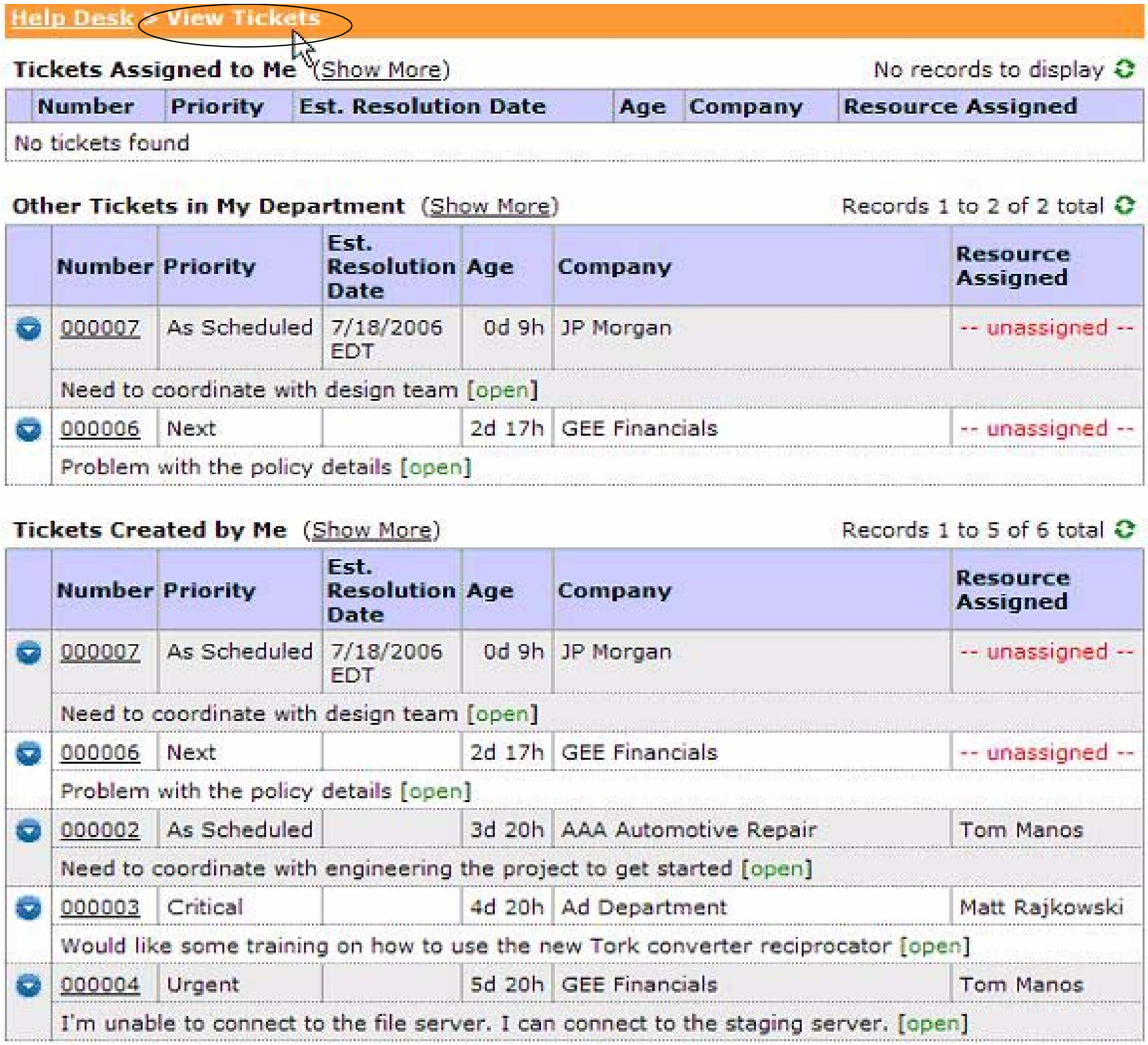
The information in this module is organized in such a way enabling you to get a dashboard view of all the sections.

The basic unit of information in a help desk is a ticket. A ticket is a problem or request, and can be entered into the system in different ways. It may be from someone in your organization, or from the entity with the problem or request.

The **View Tickets** page is divided into the following sections:

- **Tickets Assigned to Me**
- **Other Tickets in My Department**
- **Tickets Created by Me**
- **All Tickets**
- **Assigned to One of My Groups**

You can choose to view only those tickets that are relevant to you, as shown in **Figure 11.2**.



Help Desk > View Tickets

Tickets Assigned to Me (Show More) — No records to display

	Number	Priority	Est. Resolution Date	Age	Company	Resource Assigned
No tickets found						

Other Tickets in My Department (Show More) — Records 1 to 2 of 2 total

	Number	Priority	Est. Resolution Date	Age	Company	Resource Assigned
	000007	As Scheduled	7/18/2006 EDT	0d 9h	JP Morgan	-- unassigned --
	Need to coordinate with design team [open]					
	000006	Next		2d 17h	GEE Financials	-- unassigned --
	Problem with the policy details [open]					

Tickets Created by Me (Show More) — Records 1 to 5 of 6 total

	Number	Priority	Est. Resolution Date	Age	Company	Resource Assigned
	000007	As Scheduled	7/18/2006 EDT	0d 9h	JP Morgan	-- unassigned --
	Need to coordinate with design team [open]					
	000006	Next		2d 17h	GEE Financials	-- unassigned --
	Problem with the policy details [open]					
	000002	As Scheduled		3d 20h	AAA Automotive Repair	Tom Manos
	Need to coordinate with engineering the project to get started [open]					
	000003	Critical		4d 20h	Ad Department	Matt Rajkowski
	Would like some training on how to use the new Tork converter reciprocator [open]					
	000004	Urgent		5d 20h	GEE Financials	Tom Manos
	I'm unable to connect to the file server. I can connect to the staging server. [open]					

Figure 11.2 Help Desk Main Screen

Click **Show more** to view all tickets in a particular category. To go back to the previous view, click the link **Return to Overview**, as shown in Figure 11.3.

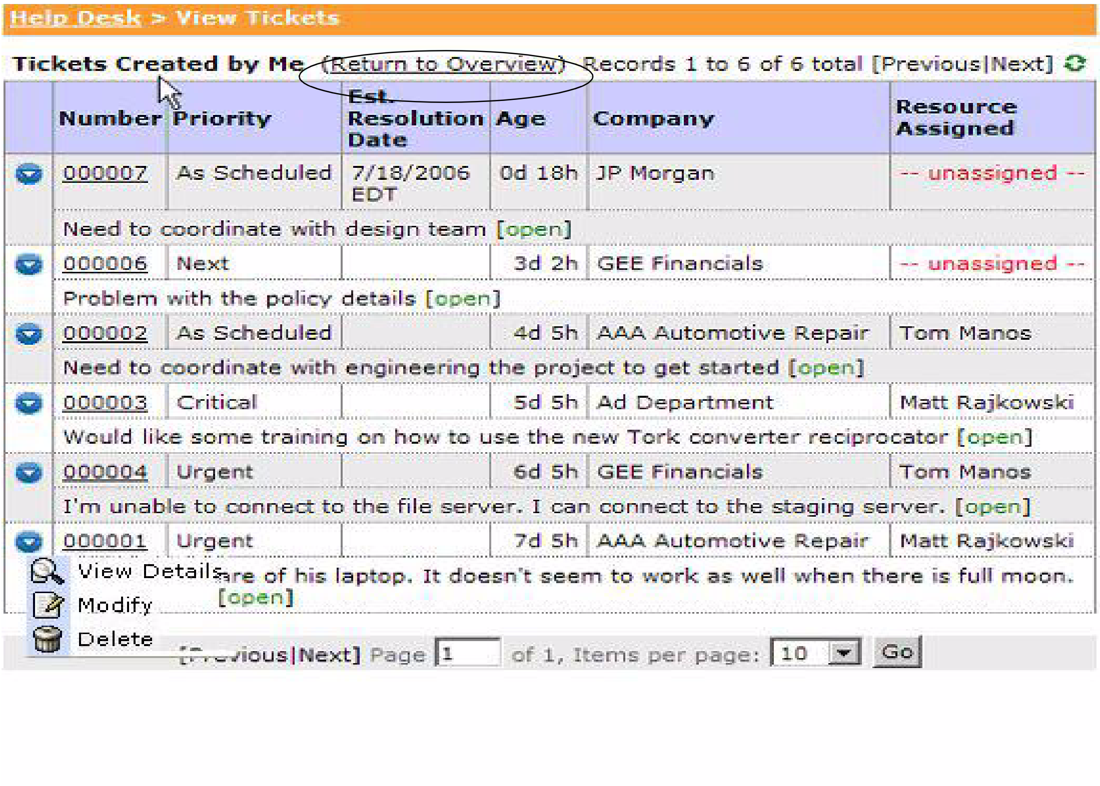


Figure 11.3 Specific Ticket List Group

The page displays different columns of information about each ticket. The following information is displayed:

- Clicking the action icon, displays a context menu with the following options only if you have access to perform these tasks:
  - View details of a ticket
  - Modify a ticket
  - Delete a ticket
- The ticket number which indicates a serial number incremented by one for each new ticket
- The priority of the ticket
- The estimated resolution date, if one was entered
- The current age of the ticket in days and hours, from when it was first opened
- The company, or account to which the ticket refers
- The person who is assigned the responsibility of resolving the issue.

11.3 Creating a New Ticket

To create a new ticket, click **Add** from the menu bar, and the **Add Ticket** page is displayed, as shown in Figure 11.4. The mandatory fields are as listed below:

- **Organization** - which is selected from the options

- **Contact** - which is selected from the options that reflect the contacts from the organization selected above
- **Issue** - which is a detailed description of the issue

Entering data in other fields along with the ones above adds value to the issue tracking and resolution process. The Add ticket page can be categorized into four sections which are discussed in detail in the following sections.

11.3.1 Adding New Ticket Information

Adding New Ticket Information is the first section in the Add Ticket page. The following details can be entered in this section:

- **Ticket source**.This option enables you to select the method of accessing the ticket from the following options:
  - **Email**
  - **Phone**
  - **Web**
  - **Letter**
- **Service contract number**. This option enables you to select the customer's contract number.
- **Asset** - This option enables you to select the asset from the organization.
- **Labor Category** - This option enables you to select the category to which the customer belongs.

11.3.2 Adding Classification Details

Adding Classification Details is the second section on the **Add Ticket** page. The following details can be entered in this category, as shown in **Figure 11.4**:

- **Location** - which enables you to describe the location of the problem
- **Category** and sub-levels - which allow you to describe the issue in detail

  The **Category Editor** is found in the **Admin** section. On setting the proper options, ticket assignment can be based on the selected categories. For more information, refer to **Section 11.3.1, "Adding New Ticket Information"**.
- **Knowledge Base** entries - entries which can be linked to the categories

  For a specific set of categories, you can view the knowledge base entries by clicking the sub-tab **Knowledge Base**.
- **Severity** - which allows you to organize problems by their importance

  You can select from the following options:
  - **Normal**
  - **Important**
  - **Critical**

- **Action Plan** - which enables you to establish a specific sequence of steps to fix the problem mentioned in the ticket

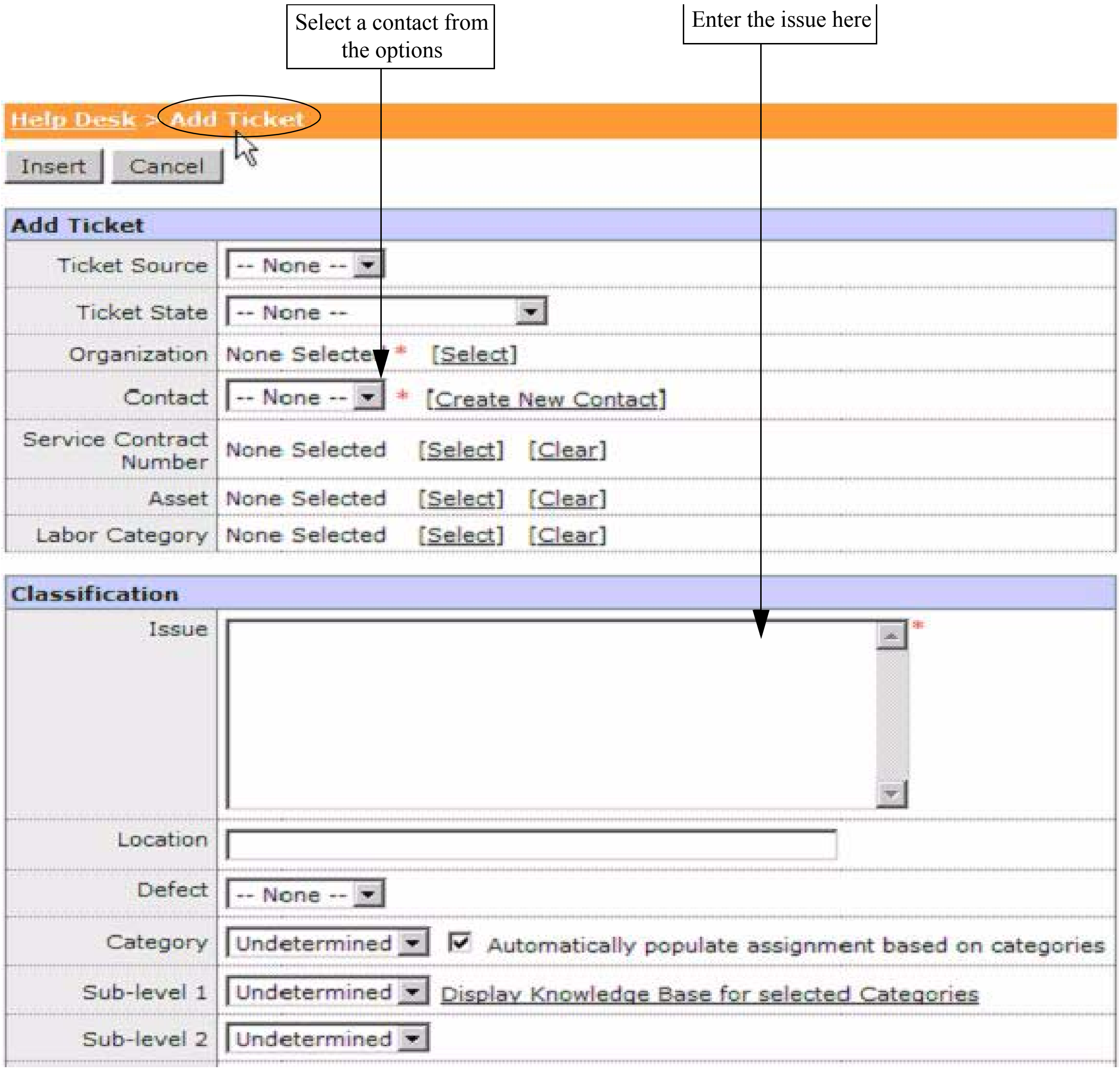


Figure 11.4 Add Ticket Page

11.3.3 Adding Assignment Information

The third section on the **Add Ticket** page is the **Adding Assignment Information**. The following details can be entered in this category:

- **Priority** -This option describes how quickly you want the issue to be addressed by your organization. You can select from the following options:
  - **Next**
  - **Critical**
  - **Urgent**
  - **As scheduled**

- **Department**- This field displays the department that is responsible for the issue.
- **Resource Assigned** - This field displays the name of the person responsible for the issue.
- **User Group** - This field displays the group of users associated to a ticket.
- **Assignment Date**- This field displays the date on which the problem occurred.
- **Estimated Resolution Date** - This field displays the date by which the problem is expected to be resolved.

All the fields are very important for tracking and reporting.

11.3.4 Adding Resolution Information

The last section on the **Add Ticket** page is the **Adding Resolution Information**. The following details can be entered in this category:

- **Cause** - which describes the cause of the problem
- **Resolution** - which describes the method used to fix the issue
- **Close Ticket** checkbox - which can be checked if you wish to close the ticket
- **Resolution date** - which displays the date on which the issue was fixed

You must enter as much information as you can to provide a better search, report, and knowledge base data.

Note: You need not enter all information during ticket creation. Some of the fields may be updated during problem resolution.

Once the details have been saved, a new ticket is created. You can view the new ticket you created in the main help desk page. Unless you have set an order of preference, the latest ticket created is displayed on top.

11.4 Viewing Ticket Details

To view the list of tickets, click **View Details** or **Modify** from the context menu, as shown in **Figure 11.3**. A list of sub-tabs is displayed on the right, and ticket information is displayed below the name of the ticket. Click the ticket number to view the details, and tabs to modify and delete the ticket.

Each sub-tab represents information on different categories of tickets. The following sub-tabs are displayed, as shown in **Figure 11.5**:

- **Details**. Selecting this option displays the basic information about a ticket.
- **History**. Selecting this option displays a chronological record of every change made, and action taken against a ticket.
- **Activity Log**. Selecting this option displays the time spent, and specific services rendered with respect to a ticket.

  This information integrates with the contracts and assets areas.

- **Action Plans.** Selecting this option enables you to establish a specific set of steps to complete, in order to fix the problem mentioned in the ticket.
- **Maintenance Notes**. This field displays specific actions taken for an issue.

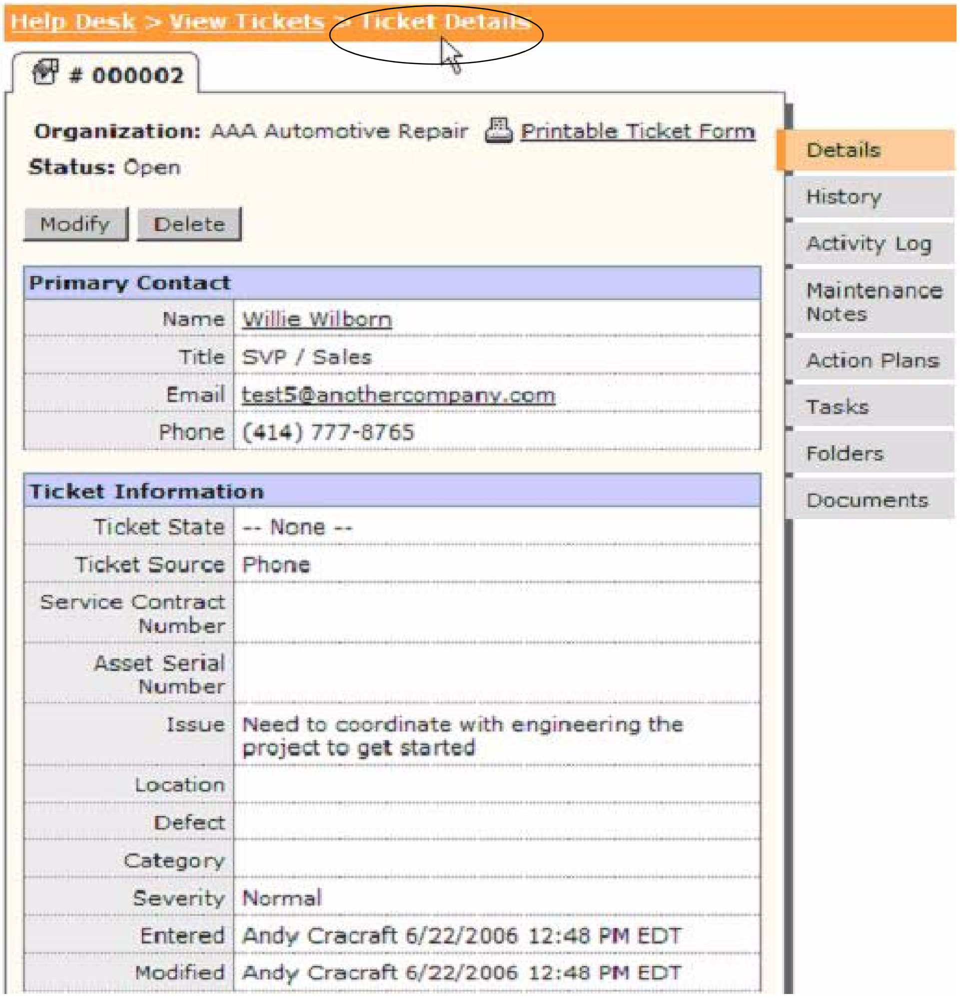


Figure 11.5 Ticket Details

- **Tasks**
- **Folders**
- **Documents**

The details are displayed in the following categories:

- **Primary Contact**. This category provides a brief description of the person having an issue.
- **Ticket Information**. This category provides basic information about the issue such as location and category.
- **Assignment**. This category provides information on the person responsible for this issue in the organization.
- **Resolution**. This category provides information on the solution for the issue, the cause of the issue, and the date on which it was resolved.

11.4.1 Viewing Ticket History

The **History** sub-tab contains a detailed chronological history of every action taken and modifications to a ticket, from its creation to its resolution.

You cannot make any modifications to this tab as it is a read-only display. You can review ticket workflow, or do post-issue analysis. The ticket **History** page is displayed, as shown in Figure 11.6.

Figure 11.6 Ticket History Page

11.4.2 Adding Activities

Click the **Activity Log** sub-tab on the **Ticket Details** page to view a list of activities that have been performed against an issue. The issue may be associated with a contract. When you click the action icon, a context menu is displayed with the following options:

- View the details of activities
- Modify existing activities
- Delete activities

You can add new activities and schedule follow-up activities.

The activities page is displayed, as shown in Figure 11.7.

Enter the following details, as shown in Figure 11.8:

- Service contract number
- Description of service provided

- Time taken for its execution including travel time
- Activity date

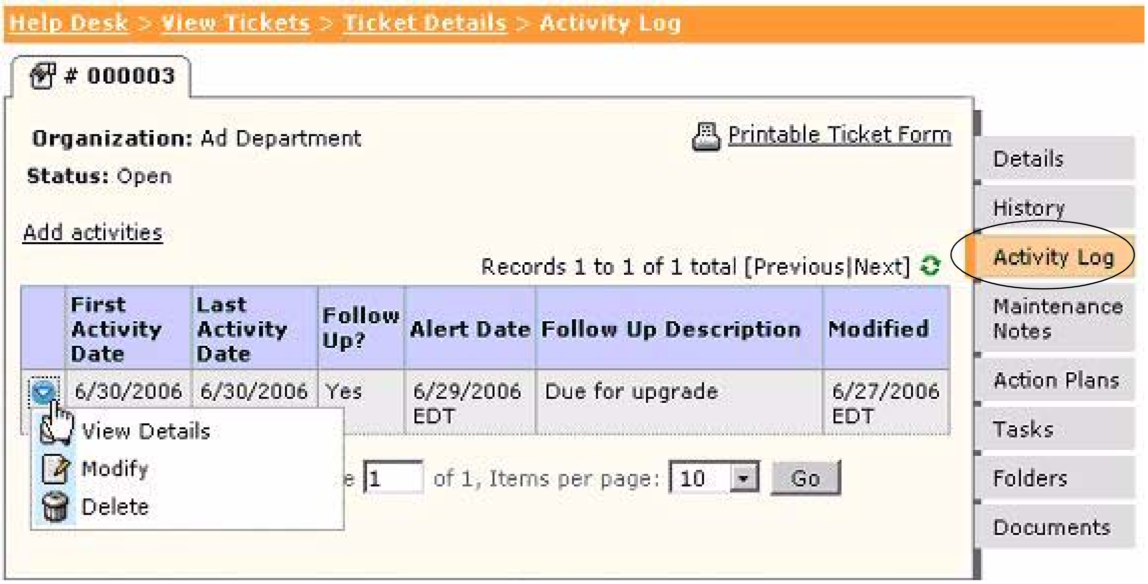


Figure 11.7 **Activity Log**

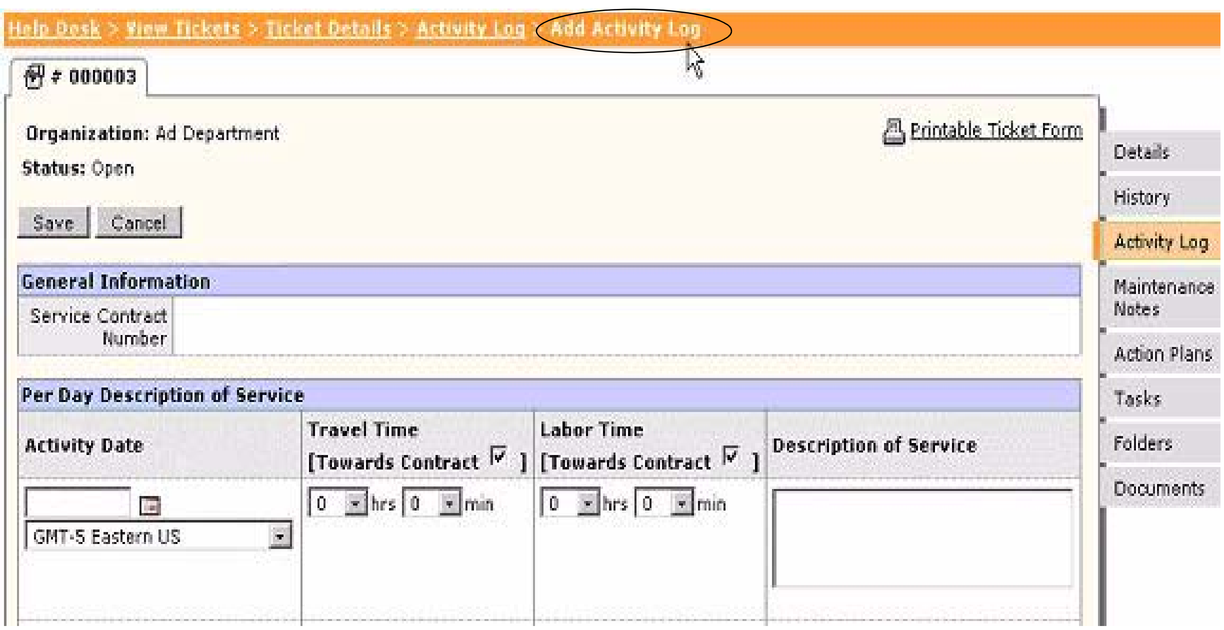


Figure 11.8 **Add Activity Log**

11.4.3 Adding Maintenance Notes

The **Maintenance Notes** tab on the **Ticket Details** page, enables you to enter specific actions taken for an issue that is related to an asset on contract. The page is displayed, as shown in **Figure 11.9**.

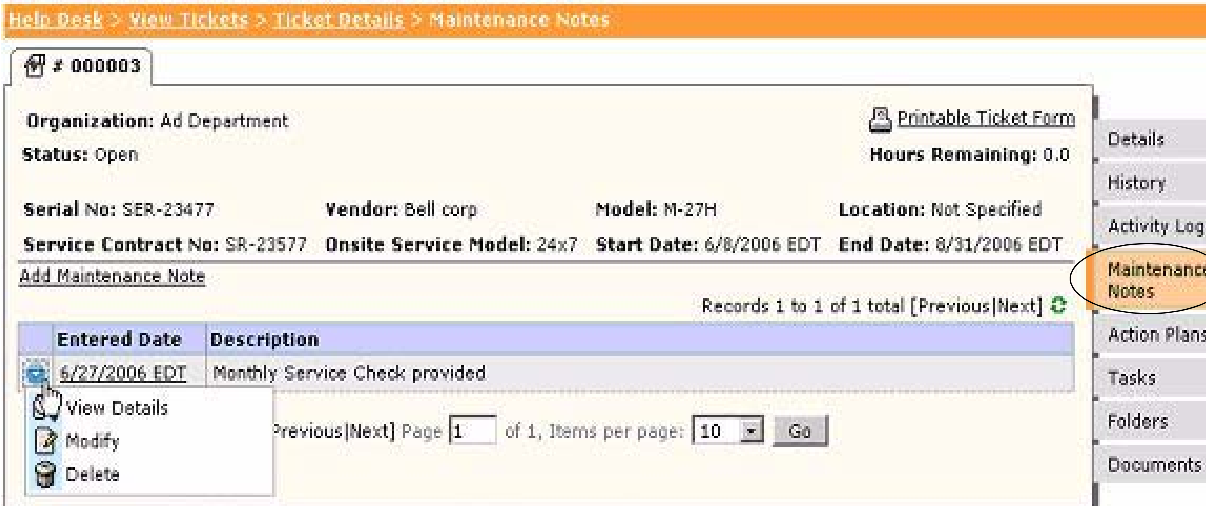


Figure 11.9 Maintenance Note

To add a maintenance note, an asset must be entered in the ticket creation process. This can be done using the **Add Maintenance Note** shown in **Figure 11.10**.

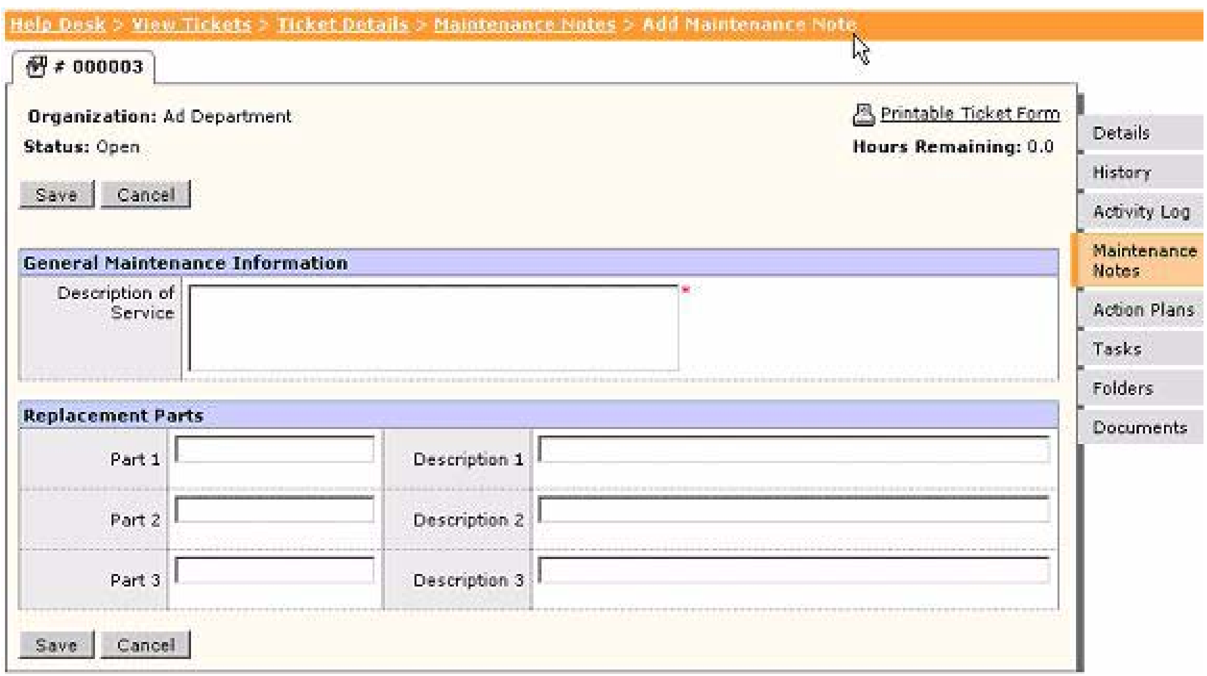


Figure 11.10 Add Maintenance Note

You can enter details about the replacement parts that may be required, so that follow-up by another person becomes easier.

11.4.4 Adding Action Plans

Ticket action plans are very similar to **Accounts** action plans. To create an action plan, click the **Add Action Plan** link located at the top of the page. Action Plans can also be added for the ticket from **Add Ticket** and **Modify Ticket** pages.

Note: For further information on adding action plans, refer to **Section 6.9.1, "Adding an Action Plan"**.

11.4.5 Adding Tasks

Tasks page can be accessed by clicking the **Tasks** sub-tab on the **Ticket Details** page. Tasks are actions assigned to a person in a department. Tasks are useful in situations where specific actions must be taken to resolve an issue, even when the actions are cross-department. When an action is assigned to an individual, they are notified, both on the Centric CRM dashboard, and through email. You can click **Add a Task** on the **Tasks** page, to add a ticket task, as shown in **Figure 11.11**.

Figure 11.11 Ticket Tasks

11.4.6 Using Folders

Folders are useful for collecting different kinds of information relating to an issue that is not covered by the basic application. Folders in help desk are identical to folders elsewhere in Centric CRM. You may create as many folders as you want. Folders are defined in the **Admin** module. They can have any number of fields with various types.

11.4.7 Using Documents

You must always store documents with an issue. Storing documents with an issue helps you organize information as specified below:

- Storing technical information about the issue
- Archiving narratives about the issue and its resolution
- Uploading correspondence, related to the issue, with the customers

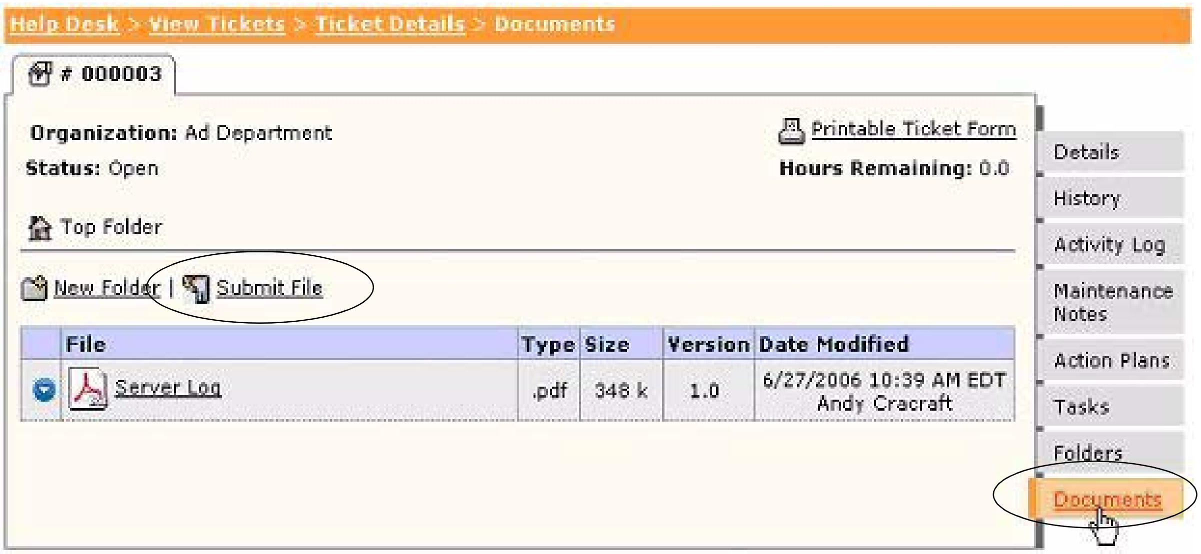


Figure 11.12 Ticket Document

The ticket information can be uploaded from a file by clicking **Submit File**, as shown in **Figure 11.12**.

11.4.8 Viewing Miscellaneous Actions

The other actions that can be performed on a ticket are as follows:

- **Printable Ticket Forms** - which provides the output as a PDF file for printing

  It is very useful when you want to print a ticket in a formal view so that a technician can take it to the customer site.

- **Exporting Tickets** - which enables you to filter tickets and manage them

  You can also include, or delete information, and create a report in HTML or spreadsheet format for downloading. To export a ticket, click **Export** on the menu bar. The **Export Data** page is displayed, as shown in **Figure 11.13**.

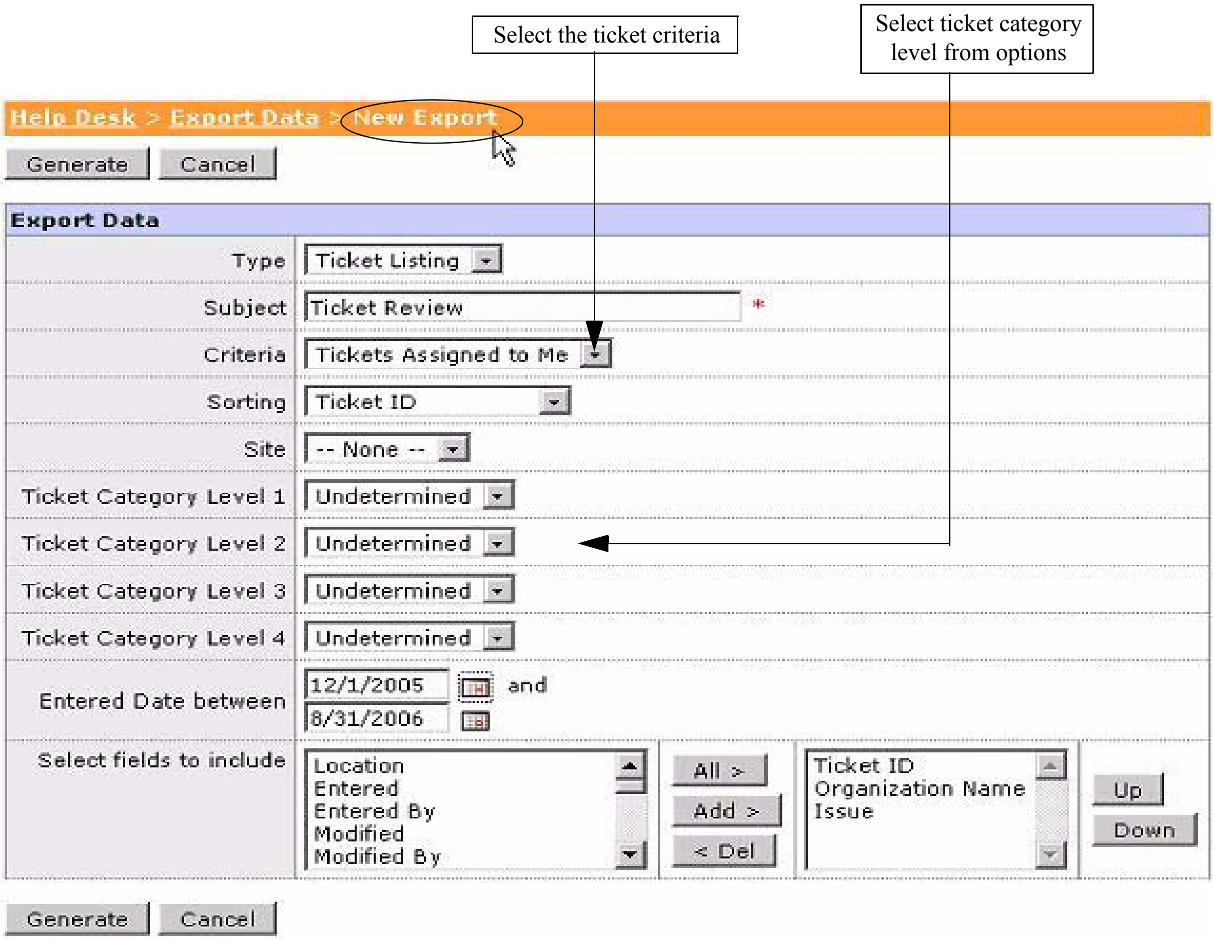


Figure 11.13 Ticket Export -New

You can download the data in `.csv` format or delete it, as shown in **Figure 11.14**. After downloading, you can format and view the data using Excel or any database program.

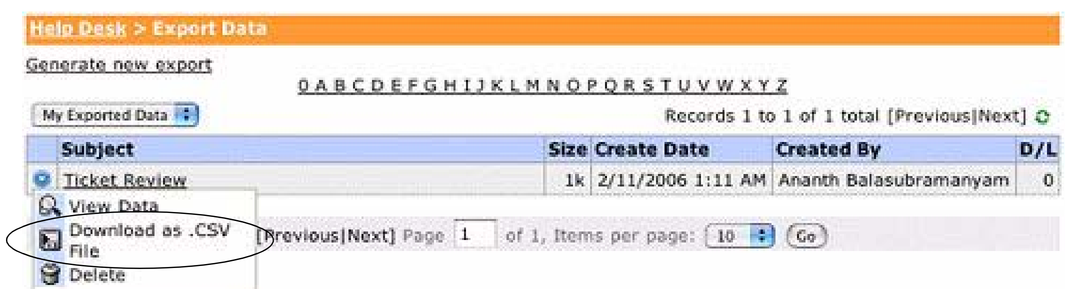


Figure 11.14 Export Ticket Data

11.5 Searching for a Ticket

You can search for a particular ticket in this module by clicking **Search** on the menu bar. A **Search Form** is displayed, as shown in **Figure 11.15**.

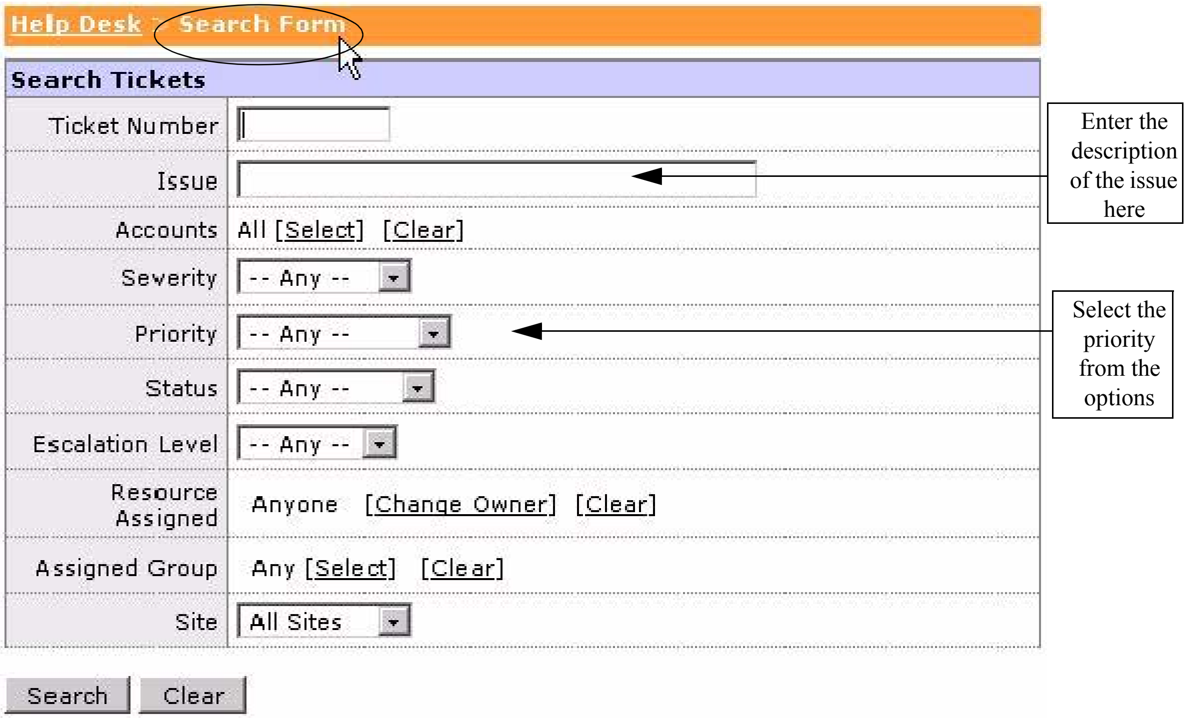


Figure 11.15 Search Form

To search for a particular ticket, enter the ticket number and the issue with which it is associated. Select from the options, the severity, priority, status, and the person assigned to this ticket. If you want to view all the tickets at a time, click the **Search** button without entering any information.

11.6 Adding Defects

A defect is used to group a set of events that disrupt services in the infrastructure. Defects have been identified as the errors associated with an incident for which the underlying cause is the defect. They allow you to organize similar tickets together based on their cause. You can access the **View Defects** page by clicking the **Defects** link on the helpdesk menu bar. New defects can be added in the **View Defects** page, as shown in **Figure 11.16**.

Figure 11.16 List of Defects in the Helpdesk Module

When you click the action icon, a context menu is displayed with the following options:

- View Details
- Modify
- Delete

The defect details page lists all tickets related to the current defect, as shown in Figure 11.17.

Tickets can be associated with defects from the **Add Ticket** or **Modify Ticket** pages.

Figure 11.17 Defects Details Page

11.7 Understanding Knowledge Base

Knowledge Base is a collection of information stored in the system used to extract inferences and suggest solutions to problems. **Knowledge Base** page can be accessed by clicking the **Knowledge Base** link on the menu bar. **Knowledge Base** entries help you in providing a solution to your problem based on your ticket categorization and solution documentation.

It also enables you to store several versions of a file for an entry that can be retrieved with the knowledge base entry. These entries can be added only after selecting the appropriate ticket categories in the list page, as shown in Figure 11.18. To add a knowledge base entry after selecting the categories, click the **Add a Document** link on the **Knowledge Base** page.

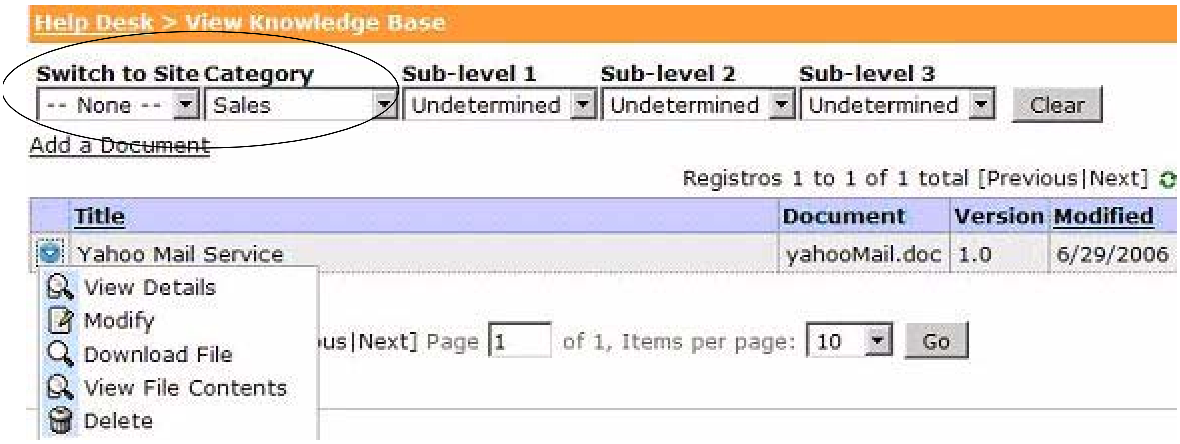


Figure 11.18 Knowledge Base for helpdesk

11.7.1 Viewing Knowledge Base Details

The knowledge base details page provides an overview of the entries in the **Details**, **File Details**, and **Record Details** sections, as shown in **Figure 11.19**.

The following tabs are displayed on this page:

- **Modify** - which enables you to add a new version of the document to the knowledge base entry
- **Delete** - which enables you to delete a document
- **Download File** - which enables you to download an attached document

  This option is only available if the knowledge base entry has an attached document.
- **View File Contents** -which enables you to view the attached document

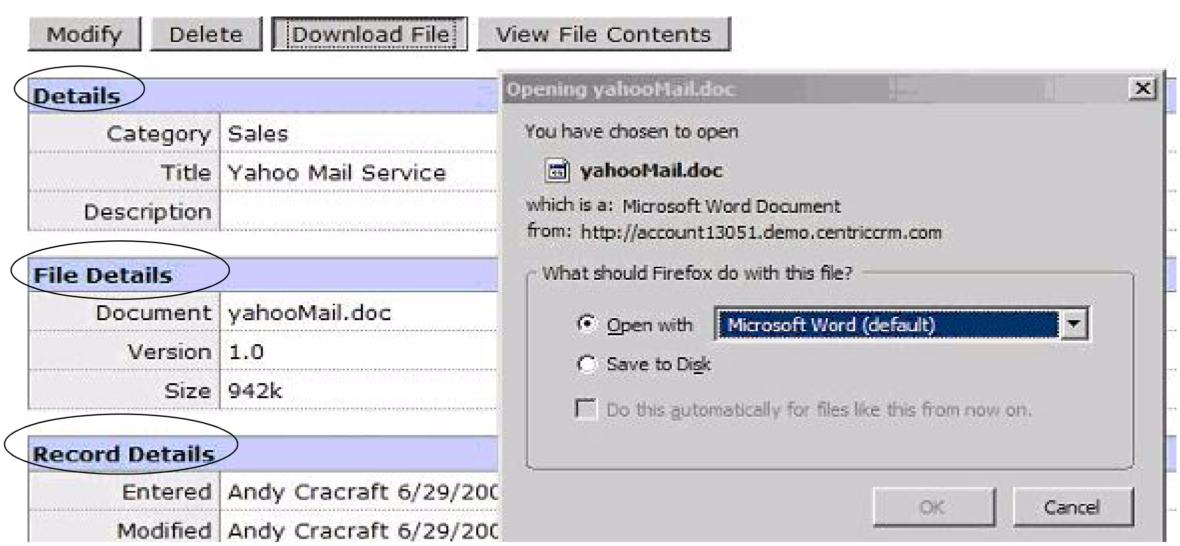


Figure 11.19 Knowledge Base Details Page

CHAPTER
12

Managing Documents

This chapter provides information on the **Documents** module of Centric CRM. This module provides facilities for a hierarchical document storage in a single database that contains all operational information.

This chapter contains the following sections:

12.1 How Does This Module Help You?

Expanding business leads to the accumulation of a large amount of information in the form of records, desktop post-its, and printed pages. Thus vital information may get lost or missed out. The **Documents** module helps you in grouping necessary information in special document stores and saving them to a database.

This module is the most powerful and useful feature of Centric CRM. **Documents** also enable you to set user group access permissions for stored data access and modification.

12.2 Viewing Documents Home Page

The **Documents** page can be accessed by clicking the **Documents** tab. This page contains a menu bar, as shown in **Figure 12.1**.

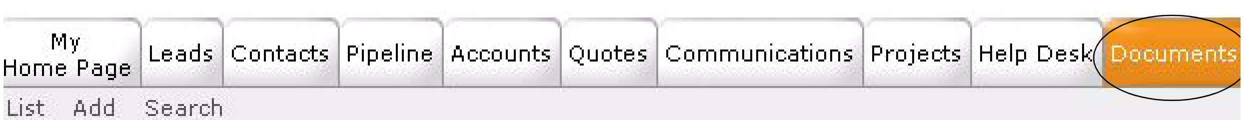


Figure 12.1 Documents Menu Bar

The **Documents** home page displays a list of document stores currently registered in Centric CRM. You can select to view the following stores:

- **Open Document Stores**

- **Archived Document Stores**

The **Open Document Store** menu displays the current status of the document store, whether it has been approved or is pending for approval. The list in this category is displayed, as shown in **Figure 12.2**.

The **Archived Document Store** menu displays all the stores that have been archived. These documents might be necessary for future reference. The list in this category is displayed, as shown in **Figure 12.3**.

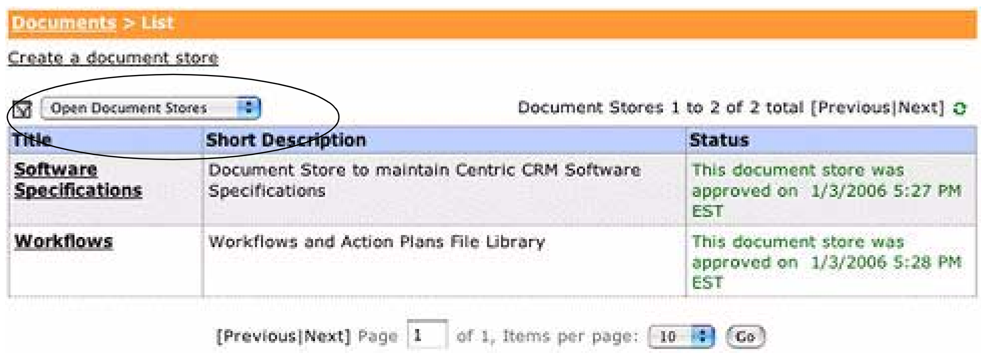


Figure 12.2 Open Store Documents

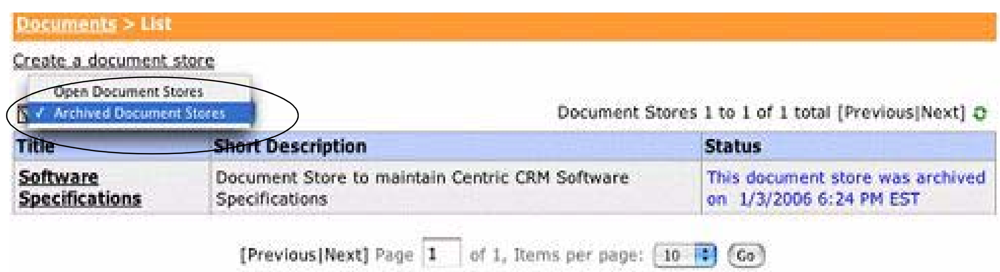


Figure 12.3 Archived Store Documents

12.3 Adding a Document Store

To add a new document store, click **Add** on the menu bar.The **Add** page containing a blank new document store form is displayed, as shown in **Figure 12.4**.

Figure 12.4 Adding a Document Store

Enter the following information:

- **Title** - which displays the name of the document store
- **Short Description** - which displays a description of the document store
- **Start Date** - which displays the date when the store was added to the list
- **Requested By** - which displays the name of the person who requested for the store
- **Organization** - which displays the client to which the store is referring
- **Status** - which displays whether the store has been approved or not

Enter key terms and words in the description for a quick search later.

12.4 Searching for a Document Store

Clicking **Search** on the menu bar displays the search page, as shown in **Figure 12.5**. To perform a search, define the search scope by selecting from the following options:

- **All Document Store data**
- **Documents**
- **Details**

Note: While defining the search keyword, please note that the search is case-sensitive.

Figure 12.5 Searching Documents

After you have entered the description in the **For** field, the system searches through all available items, and displays the documents that satisfy your criteria. The page listing the search items is displayed, as shown in **Figure 12.6**.

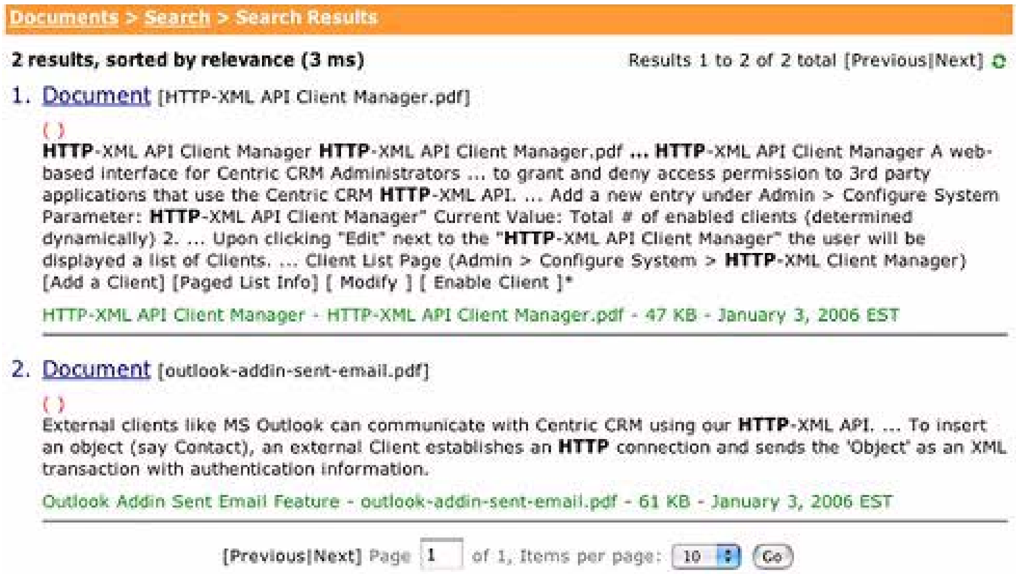


Figure 12.6 Documents Search Results

12.5 Viewing Document Store Details

Click the title of the document store to view its details. The following tabs are displayed on the **Document Store Details** page:

- **Documents** - which displays all folders and documents that belong to that store
- **Team** - which displays the team members to whom the store belongs
- **Details** - which displays the details of the store
- **Permissions** - which provides you an option of setting the permissions to view the store

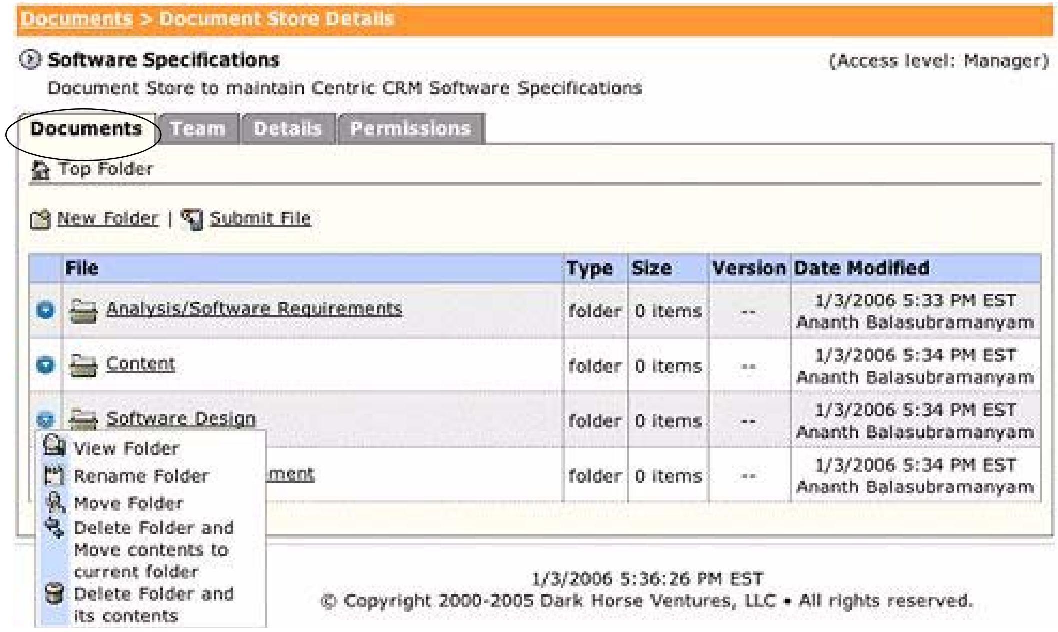


Figure 12.7 Document Store Details: Tab Documents

12.5.1 Viewing Documents Page

Within a store, you can organize folders according to hierarchy and place relevant files in each folder. You can select from a variety of options for modifications, as shown in Figure 12.7.

Note: There are several pre-defined access levels, of which the manager's level is the topmost. You may configure permissions for access to the folders by defining the access and role of each user.

You can access the **Documents** section by clicking **Documents** on the **Document Store Details** page. On this page, when you add a folder, a list of sub-folders and files is displayed, as shown in Figure 12.8.

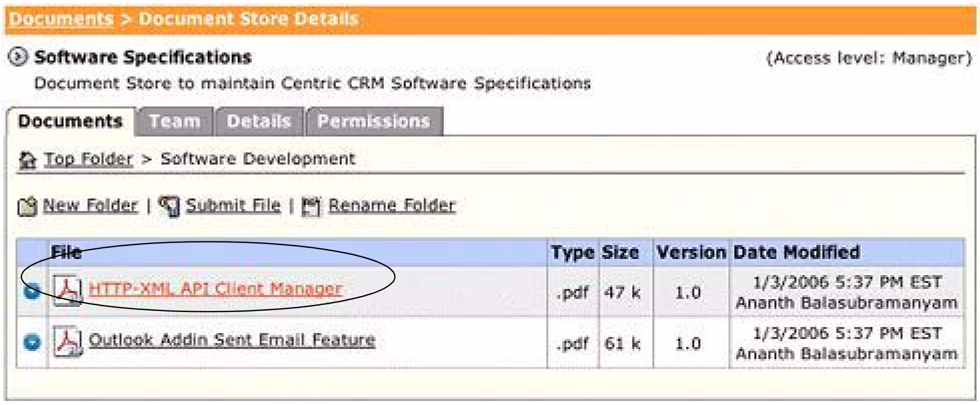


Figure 12.8 Document Store Details: Folder Content, Files List

To submit a file into the current folder, click the **Submit File** link at the top. The **Upload File** dialog is displayed, as shown in **Figure 12.9**.

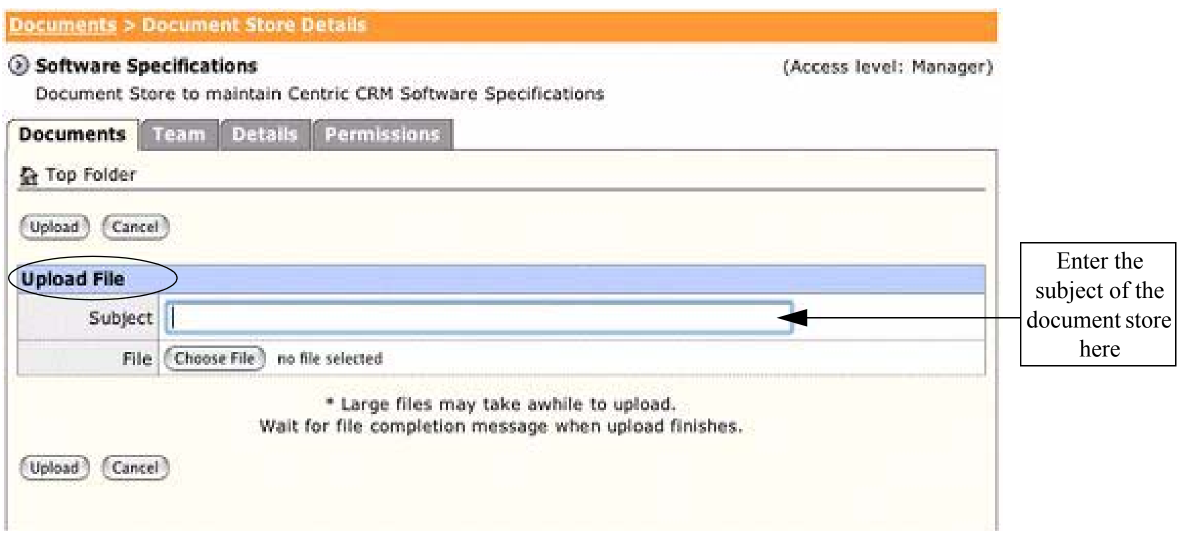


Figure 12.9 Document Store Details: Uploading File

While uploading a document file, enter the subject and click **Choose File** to browse the target file in your hard drive. You can upload as many files as required to a folder. Click **Upload** to submit, or **Cancel** to abandon file upload.

12.5.2 Viewing Team Page

Click the **Team** tab on the **Document Store Details** page to view and modify the team membership. A page containing a list of people who can access the store is displayed along with their level of access.

You can select from several sections of authorized individual groups listed as follows:

- Employees
- Account contacts
- Roles

For each group, details such as the department to which they belong, email addresses, and the last access date are displayed. The access level, which determines the permissions granted to the level holder, is set by the manager.

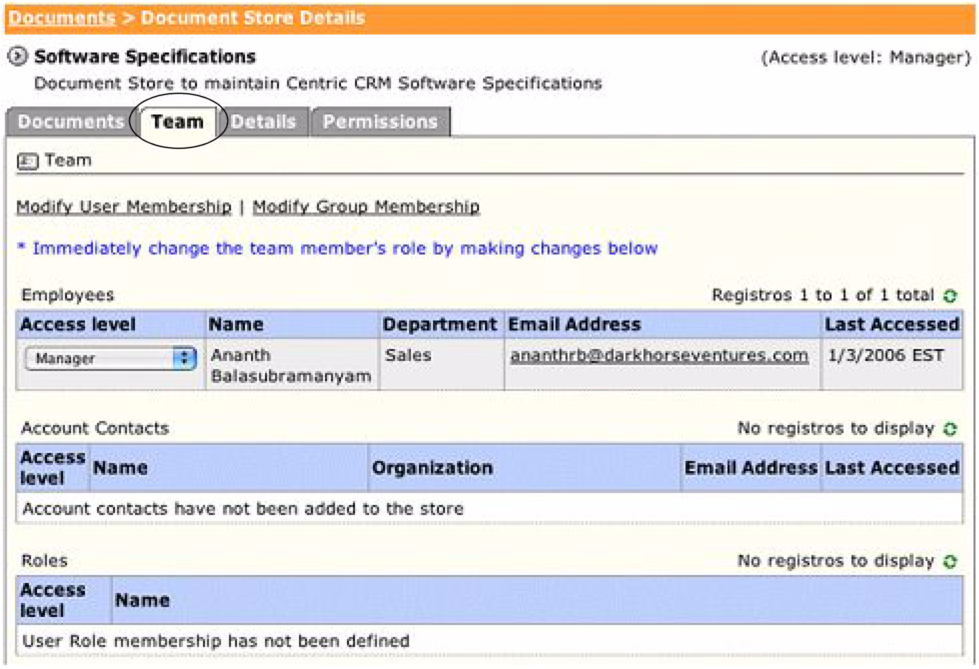


Figure 12.10 Document Store Details: Tab Team

You can setup access membership in the following ways:

- **Modify User Membership** - for individuals
- **Modify Group Membership** - for groups

Under individual user membership, user details are interlinked. When you select a category in the first column (**Add a user** from), the departments that belong to that category are displayed in the second column (**Select a department**), as shown in Figure 12.11.

Upon selecting a department, a list of related contacts in the third column (**Select a contact**) is displayed. After selecting a contact, you can add it to the store access team in the last column (**Team Members**).

To delete a member from the team, click the name in the **Team Members** column. Click **Update Team** to save the modifications.

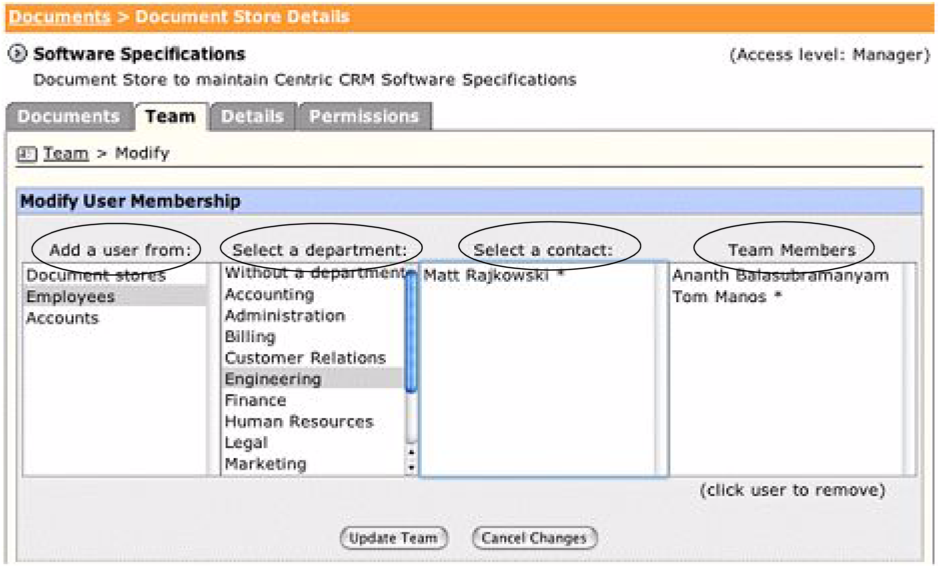


Figure 12.11 Document Store Details: Modifying User Membership

The group access membership grants access to the store for all members of specified groups, whether it is roles or departments. The following columns help you in modifying individual access. The details page is shown in Figure 12.12. This page enables you to specify values for the following:

- Add a group from
- Select a role
- Team Members

All the columns are interlinked. Click **Update Team** after making any changes.

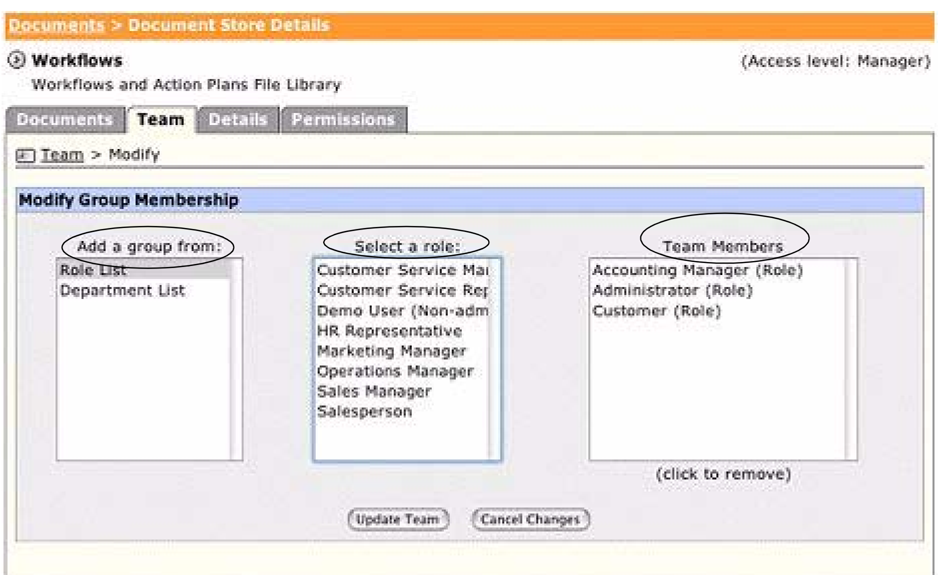


Figure 12.12 Document Store Details: Modifying Groups

12.5.3 Viewing Details

The **Details** section is shown in **Figure 12.13**. Clicking the **Details** tab displays a page which contains the following fields:

- Title
- Approval status
- Last date of entry
- Modification dates
- Other details

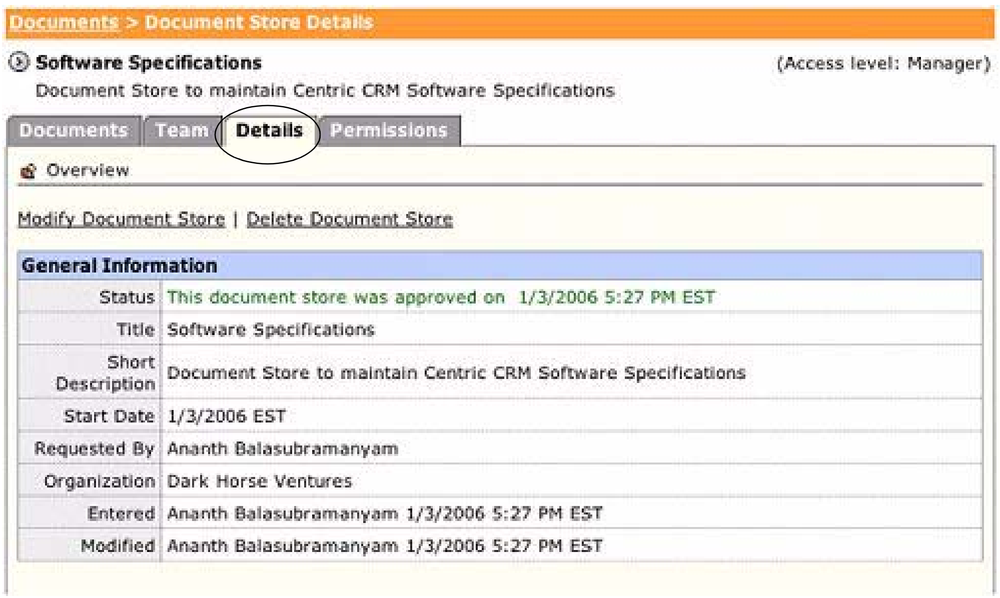


Figure 12.13 Document Store Details: Tab Details

Clicking **Modify Document Store** will display an editable page, as shown in **Figure 12.14**, which enables you to modify the store. You can also specify the store status, whether approved and/or archived.

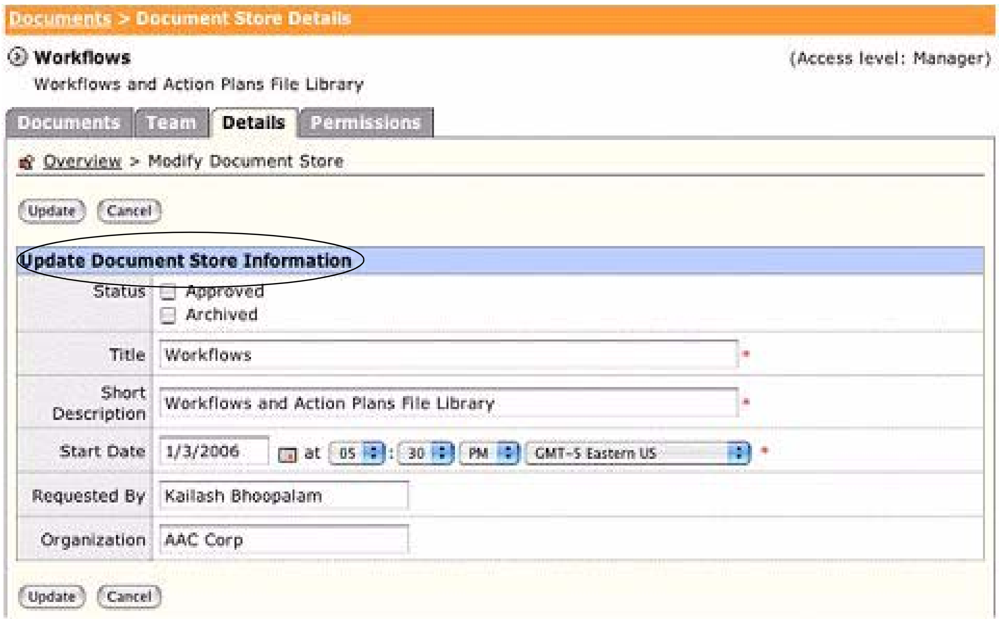


Figure 12.14 Document Store Details: Updating Details

Note: The **Archived** status is used to show and hide stores in the **Documents** home page.

12.5.4 Viewing Permissions

The **Permissions** tab on the **Document Store Details** page enables you to view and configure access permissions to the store for different user access levels. This page is shown in Figure 12.15.

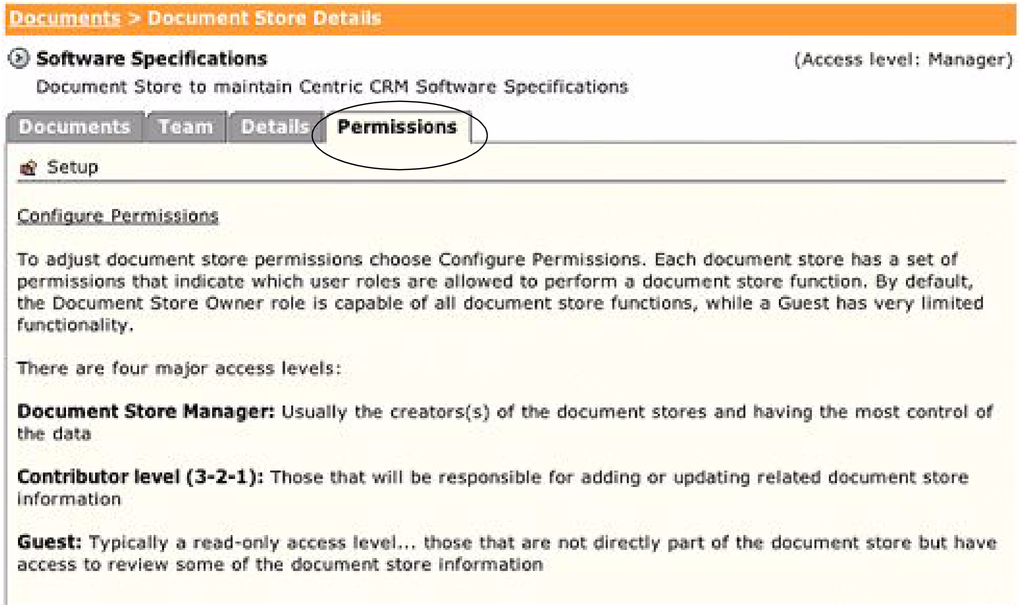


Figure 12.15 Document Store Details: Tab Permissions

The pre-defined levels are listed below:

- Manager
- Contributor Levels 3, 2 and 1
- Guest

The access levels increase upwards from the guest to the manager. This is to ensure access to information at all levels, and to prevent tampering of data. The manager sets the permissions and has the most control of data.

The manager uses the **Configure Permissions** link to set user access and define roles for each level. Each parameter is defined and the access levels are set, as shown in **Figure 12.16**. The main areas are:

- Document Store Details
- Team Members
- Document Library
- Setup

Each of the above are sub-divided into actions. For each action, the lowest access level can be specified by choosing from a pop-up menu to the right of the action.

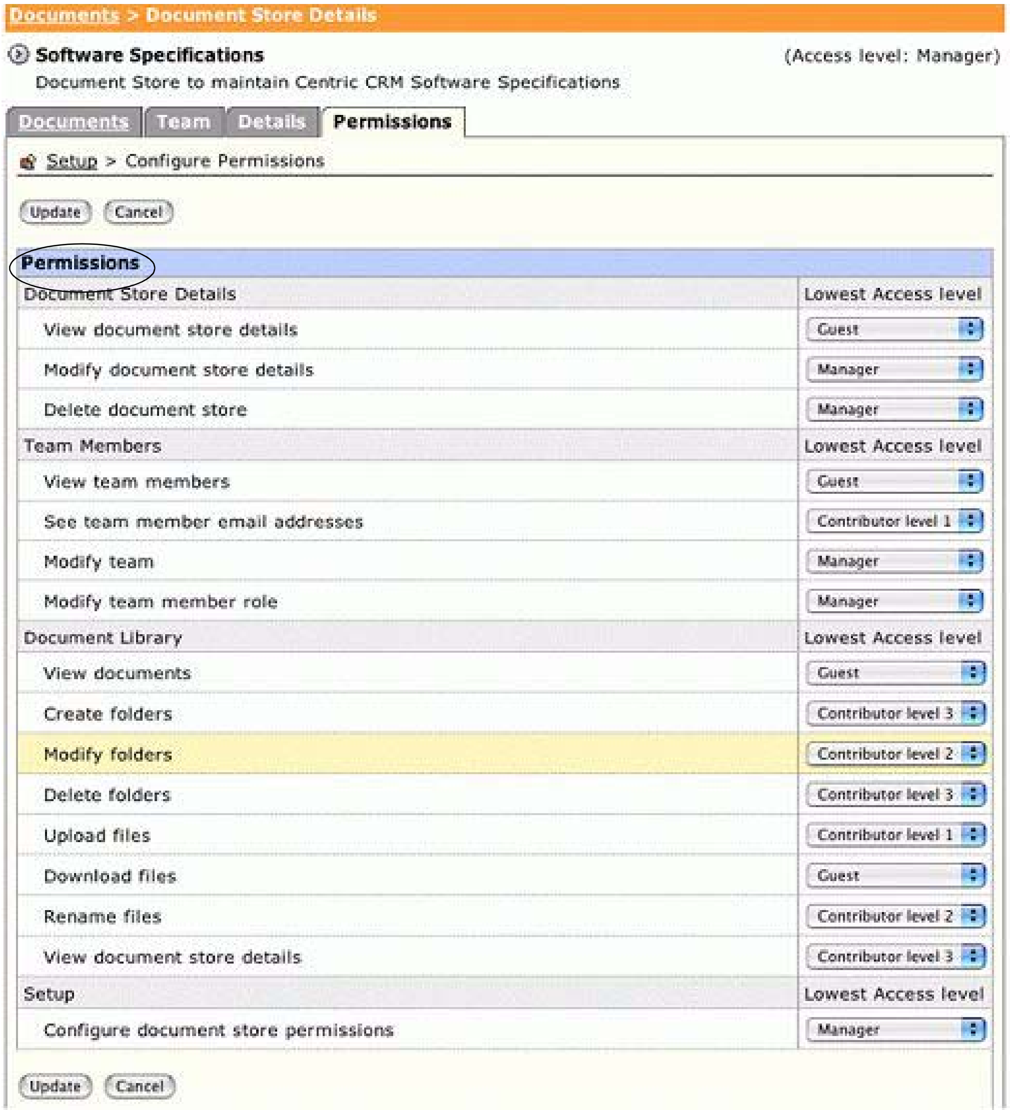


Figure 12.16 Document Store Details: Configure Permissions

Once the permissions are set, click **Update** to save the information.

CHAPTER
13

Managing Employees

This chapter provides information on the **Employees** module of Centric CRM. This module helps you store basic information about employees.

This chapter contains the following sections:

- Section 13.1, "How Does This Module Help You?"
- Section 13.2, "Viewing Employee Home Page"
- Section 13.3, "Managing Employees"

13.1 How Does This Module Help You?

This module contains information about employees of your company, who become users of Centric CRM. It acts as an employee database providing access to employee information, such as title, email address, phone numbers, and address. The module also enables you to set data ownership responsibilities for all employees.

13.2 Viewing Employee Home Page

You can access the **Employee** module by selecting the **Employees** tab. The employee menu bar is displayed, as shown in **Figure 13.1**.

Figure 13.1 Employee Menu Bar

By default the **View Employees** page is displayed, as shown in **Figure 13.2**. This page displays a list of employees along with their department, title, and phone number.

Figure 13.2 View Employees Page

13.3 Managing Employees

The functions available in the **Employees** module are:

- Adding employees
- Viewing employee details
- Modifying employee details
- Deleting employees
- Downloading employee vCards

To add a new employee, click the **Add an Employee** link located at the top of the page, or the **Add** on the menu bar. A blank employee form is displayed, as shown in Figure 13.3.

The only mandatory field is the **Last Name**. The values in the **Department** options can be modified in the **Admin** module. The users of Centric CRM can communicate with their customers in the following ways:

- Primary phone number
- Email address
- Postal address

Note: Ensure the above details are entered carefully as they make up the employee record while searching. The information entered can be changed at any time.

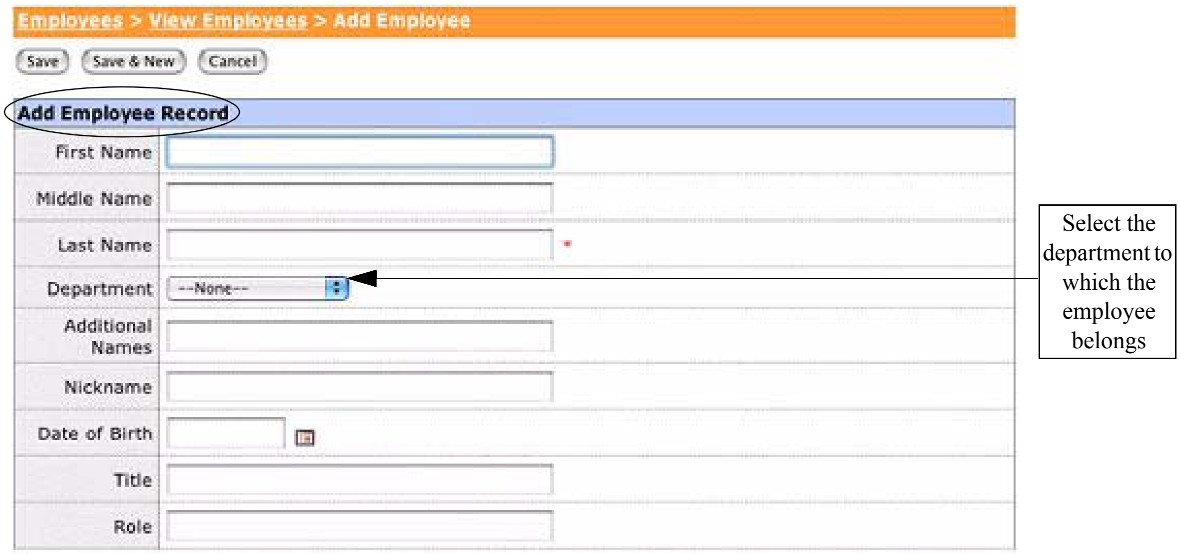


Figure 13.3 **Add Employee Page**

After entering information, you can perform the following tasks:

- Save the record and go back to the **Employees** main page by clicking **Save.**
- Save the record and begin entering another employee on a new page by clicking **Save and New.**
- Quit from the screen without saving and go back to the **Employees** page by clicking **Cancel.**

The **View Employees** page contains a list of employees in alphabetical order. The criterion for sorting can be modified by clicking the column headers. For example, clicking **Department** results in a listing sorted by department.

When you click the action icon, a context menu is displayed with options to perform the following operations on an existing employee record:

- **View Details** - which enables you to view details of an employee
- **Modify** - which enables you to modify details of an employee
- **Delete** - which enables you delete an employee from the list
- **Download vCard** -which enables you to download an employee contact vCard

Note: Not all users will have permission to perform all actions. Refer to the Figure 13.2.

Viewing Employee Details

Click **View Details** from the context menu. A page containing the employee details is displayed. You can modify details, or delete the record, as shown in Figure 13.4.

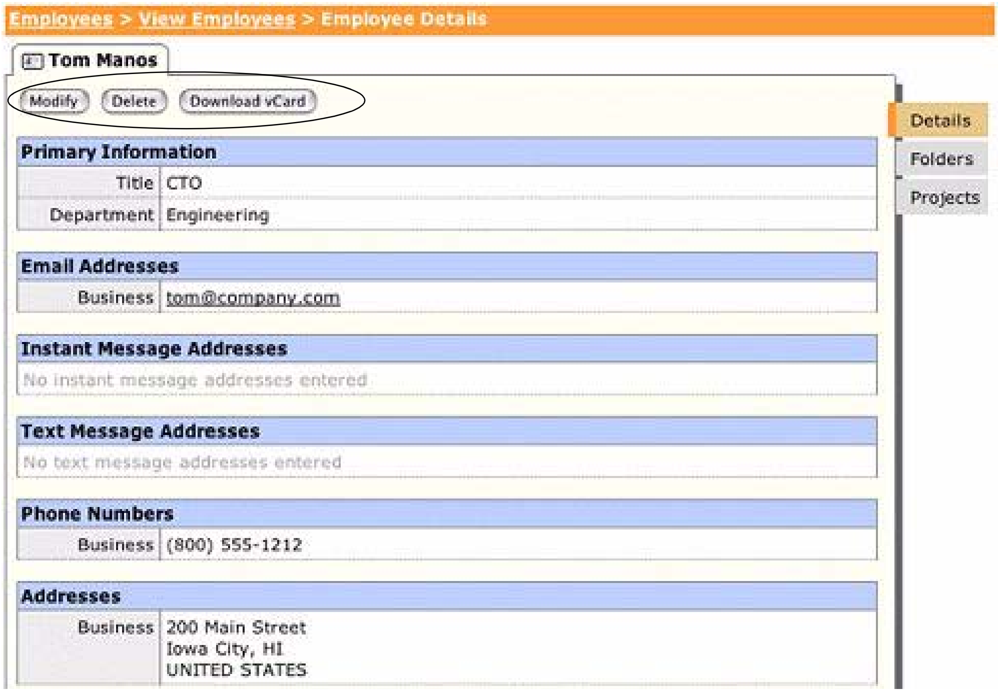


Figure 13.4 Employee Details Page

Modifying Records

Clicking **Modify** on the context menu, displays a page, as shown in **Figure 13.5**, You are allowed to edit the information in the fields. You can update or cancel the modifications.

Deleting Records

To delete an employee record from the list, click **Delete**. A pop-up is displayed warning you of the responsibilities, such as a contact or an opportunity attached to the employee.

Even after an employee record is deleted, the responsibility, will still remain in the contact module. Though the owner column for that contact will have the ex-employee's name, it is just a reference and has no bearing on the contact.

Downloading vCard

The **Download vCard** feature is described in detail in the **Contacts** module. For more information, refer to "Downloading a vCard" under **Section 4.2.1, "Viewing Contact Search Results"**.

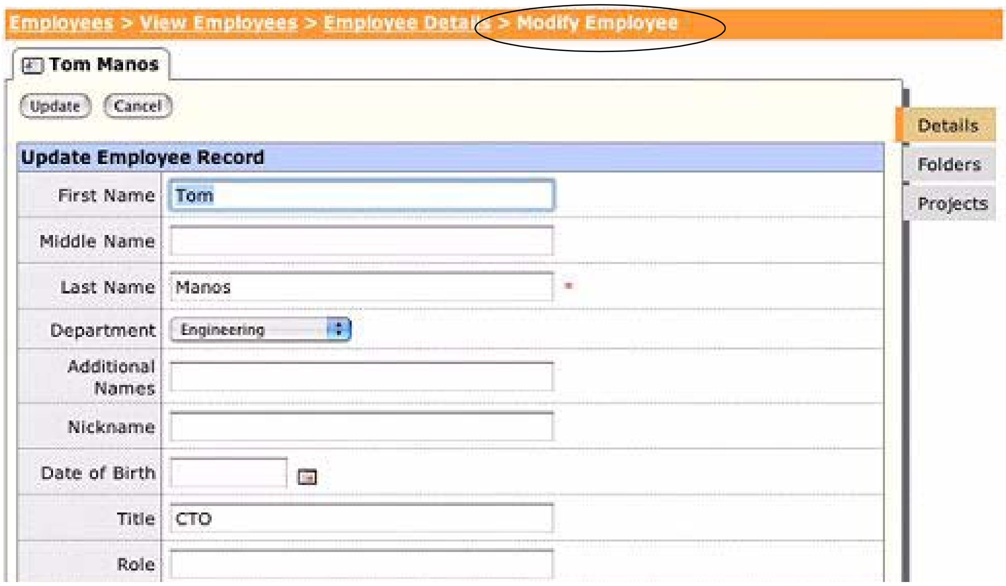


Figure 13.5 Modify Employee Details

13.3.1 Viewing Folders

Employees Folders work similar to the folders under other modules. You can store a variety of information about employees by configuring custom folders.

13.3.2 Adding Projects

The **Projects** feature for an employee provides details of projects in which the employee is involved. The **Projects** page, as shown in Figure 13.6, can be accessed by clicking the **Projects** sub-tab on the **View Employees** page displaying the following details:

- Start Date - which displays the date on which the project began
- Project Name - which displays the project title
- Progress - which displays the status of activities pertaining to the project

Figure 13.6 Projects Page

Clicking the project displays the project details of which the employee is a member.

CHAPTER
14

Viewing Reports

This chapter provides information on the **Reports** module of Centric CRM. This module helps you in examining and displaying data in Centric CRM.

This chapter contains the following sections:

- **Section 14.1, "How Does This Module Help You?"**
- **Section 14.2, "Accessing the Reports Page"**
- **Section 14.3, "Viewing Report Queue"**
- **Section 14.4, "Creating Reports"**
- **Section 14.5, "Adding Report Parameters"**

14.1 How Does This Module Help You?

This module contains a report system that enables you to perform the following tasks:

- Gather data
- Sort data
- Combine data
- Display data

The data can be in any format. You are allowed to generate reports in PDF, HTML, CSV or Excel formats as per your requirement. The Report writer feature enables you to create custom reports at reasonable rates. These custom reports contain not only data, but also your logo, and other related graphics. The reports in Centric CRM have rich multimedia capabilities and produce professional outputs.

14.2 Accessing the Reports Page

The Report module can be accessed by clicking the **Reports** tab. **Reports** menu bar contains the links **View** and **Add**, as shown in **Figure 14.1**. The **Reports** page displays the following lists:

- Reports that are in the queue
- Reports ready for viewing

Figure 14.1 Menu Bar

14.3 Viewing Report Queue

Generating reports requires complex, processor- and disk-intensive queries to various parts of the Centric CRM database. A report queue system helps you in generating any number of reports without affecting the normal usage of the system. The queue is generated such that if only your report is generated, you get to access it quickly. If some reports need to be executed before yours, then you may have to wait. The reports queue page is shown in **Figure 14.2**.

In a new system, there will be no reports in queue or reports ready for viewing.

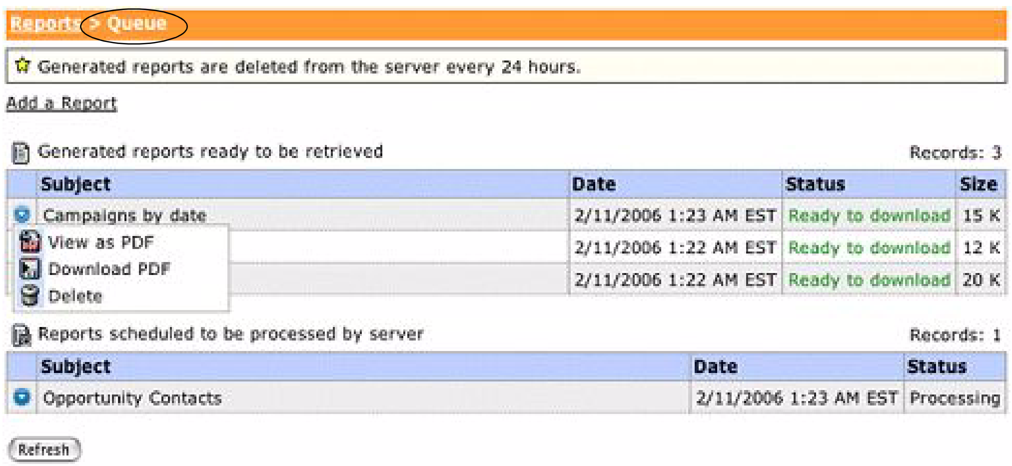


Figure 14.2 Reports Main Page- Queued Reports

Note: All generated reports are deleted from the server every 24 hours. Ensure you download all reports that you may require in the future.

14.4 Creating Reports

To create a new report, click **Add** located at the top on the menu bar, or click the **Add a Report** link, as shown in **Figure 14.2**.

Clicking **Add** displays a page allowing you to select from the modules for which reports are available, as shown in **Figure 14.3**.

Clicking a module name displays a page listing all the available reports for that module. The base system is delivered with numerous reports covering all the modules.

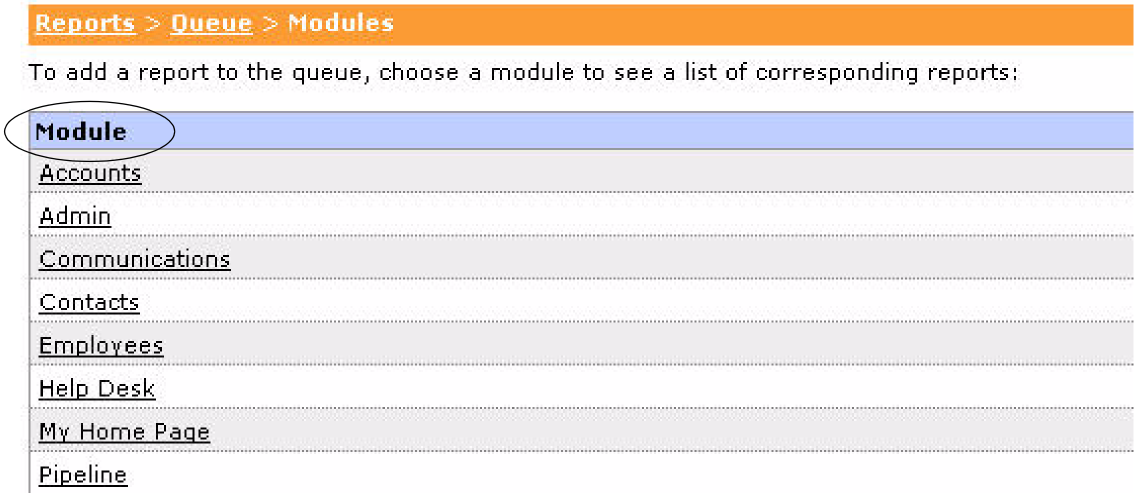


Figure 14.3 Choose Module to Add Report

For example, if you select the **Pipeline** module, a report list page is displayed, as shown in **Figure 14.4**. This page enables you to select a report from the list.

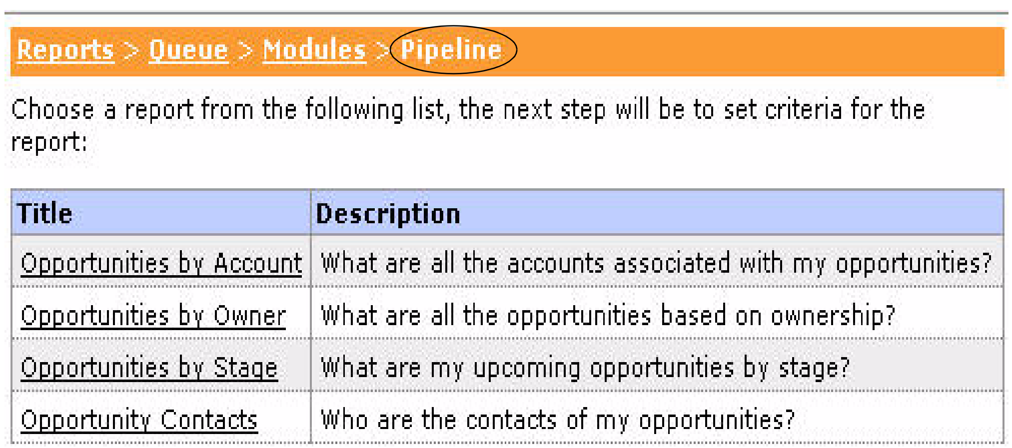


Figure 14.4 Reports List

The table lists the report titles and a short description for each of the reports. Click a report name and a parameters page is displayed, as shown in **Figure 14.5**. From this page, you can enter the following details:

- Begin and end dates
- Source
- Probability
- Stage
- Subject

You can select the type of report you wish to generate from the following formats:

- PDF

- HTML
- CSV
- Excel

Select the option (**email report when it is processed)** to receive the generated report through email.

After entering the required details, click **Generate Report**.

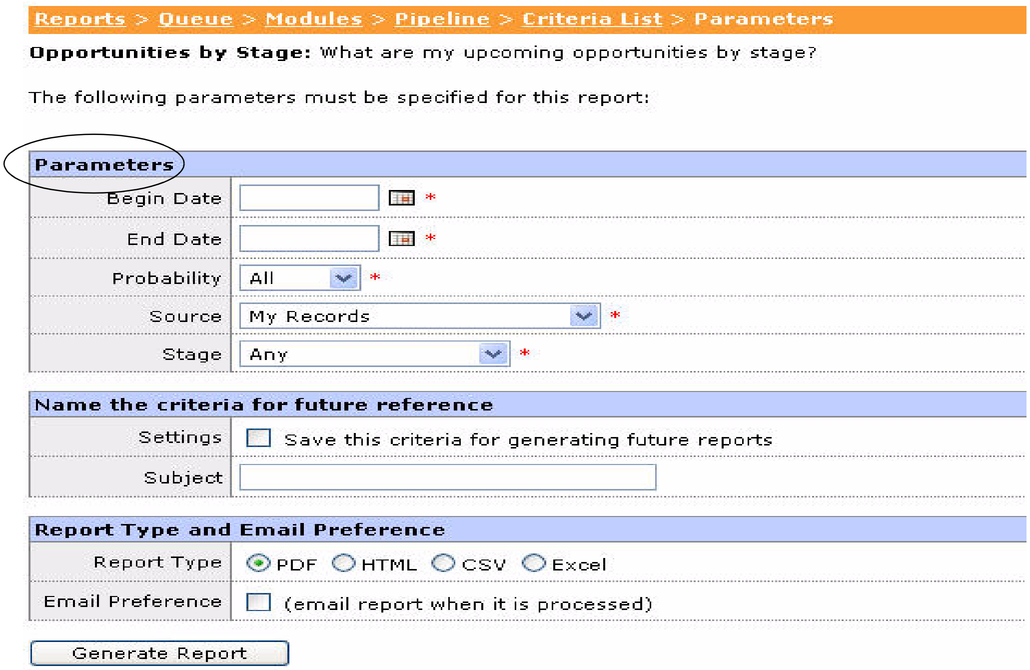


Figure 14.5 Report Parameters/Generate Report

Clicking **Generate Report** displays a page confirming that the report has been added to the queue. You can view the report queue on your dashboard by clicking **View Queue**, as shown in Figure 14.6.

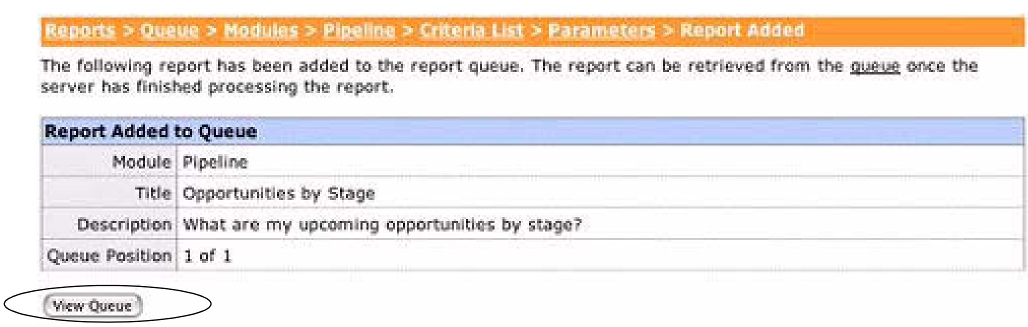


Figure 14.6 Report Queued

14.5 Adding Report Parameters

Some reports require parameters. For example, a trouble ticket report might require a date range, or some contact reports might require you to select the type(s) of contacts you want to include in your report.

Complex custom reports might require you to specify different parameters. The reports included with Centric CRM are mostly simple reports with only a few parameters.

The parameters usually available for a report are as specified below:

- A pair of dates to set the beginning and ending of opportunities you want to view
- A probability to further filter the opportunities
- The source of the opportunities, either yours, or all those in your hierarchy
- The stage of the opportunities you want to view

You can also save the basic parameters of any report that might be needed to generate a similar report in the future by checking the checkbox at the bottom. The next time you want to create a report of this type, you will be allowed to use the saved parameters.

14.5.1 Cancelling Reports

You can cancel a report you have submitted to the queue before it has been run. Clicking the action icon, displays a context menu, as shown in and select **Cancel Report**.

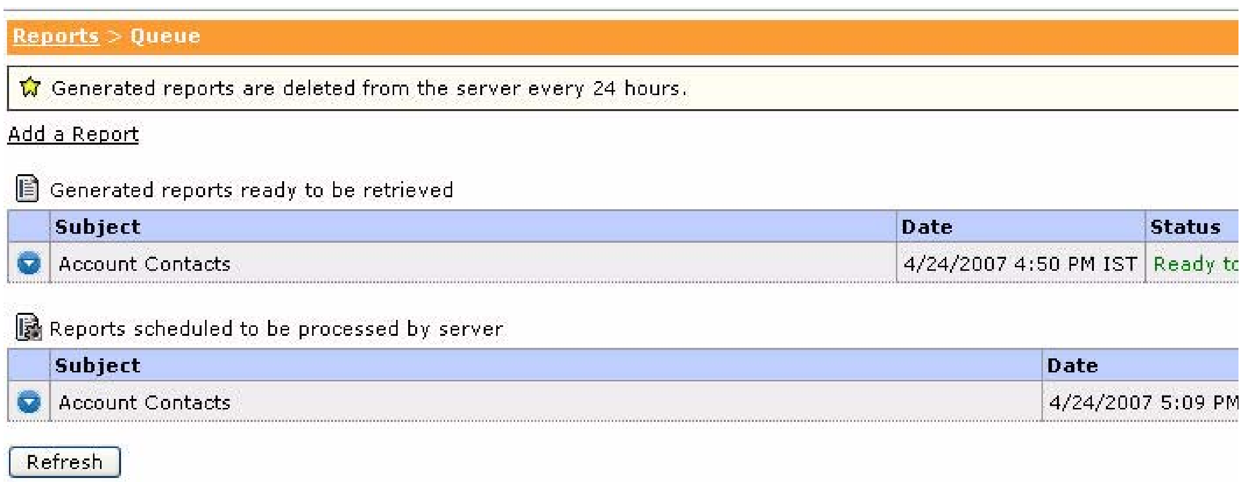


Figure 14.7 Cancelling a Report

14.5.2 Examining Your Reports

Clicking the action icon from the **Reports** dashboard, displays a context menu, as shown in **Figure 14.2**. If your browser can automatically view the generated documents (PDF, HTML, CSV or Excel), select **View as PDF (**if the report is in PDF format**)**. If not, select **Download as PDF** to download the report file to your hard disk for viewing.

CHAPTER
15

Configuring the Application

This chapter provides information on the **Admin** module of Centric CRM. This module helps the administrator in controlling the global aspects of the system, such as users, roles, modules, and global parameters. The administrator can also check the system usage using this module.

This chapter contains the following sections:

- **Section 15.1, "How Does This Module Help You?"**
- **Section 15.2, "Viewing the Admin Page"**
- **Section 15.3, "Managing Users"**
- **Section 15.4, "Managing Roles"**
- **Section 15.5, "Managing Portal Roles"**
- **Section 15.6, "Configuring Modules"**
- **Section 15.7, "Configuring the System"**
- **Section 15.8, "Checking System Usage"**

15.1 How Does This Module Help You?

The **Home Page** module enables you to configure personal preferences, and the **Admin** module enables you to configure global system preferences, if you have permission to do so. Access to the **Admin** module should be granted sparingly because changes made in this module affect all users.

The **Admin** module allows an administrator to perform the following tasks:

- Add and modify users
- Add and modify roles
- Modify Centric CRM modules
- Add and modify custom folders in many modules
- Edit the system lookup lists in every module
- Edit global parameters that affect overall system operation
- Check system usage

15.2 Viewing the Admin Page

You can access this module by clicking the **Admin** link located on the top right corner of the page, along with the **Print**, **Help** and **Logout** options (above User information), as shown in **Figure 15.1**.

Figure 15.1 Admin Link

Most installations of Centric CRM allow only limited access to this module, so you may not be able to view all the options.

Click **Admin** to select the action you want to perform. The **Admin** main page is shown in **Figure 15.2**.

Figure 15.2 Admin Main Page

15.2.1 Accessing the Admin Module

A user is defined as a person who is able to log in to Centric CRM. Every user of Centric CRM is assigned a role, defining exactly what a user can do within the system. Centric CRM contains several pre-defined roles that you can modify, or delete, and add additional roles.

Note: Users in Centric CRM Enterprise and Centric CRM Hosted editions must be licensed, and active users count against the number of seats you have licensed. Inactive users cannot log in to the system, and hence do not take up any seat licenses.

15.3 Managing Users

You can modify or add users by clicking the **Manage Users** link on the **Admin** page.

A **View Users** page is displayed, as shown in **Figure 15.3**. This page lists all the users. Clicking the action icon displays a context menu with options to perform the following tasks:

- Add new users
- Modify existing user details
- Disable users

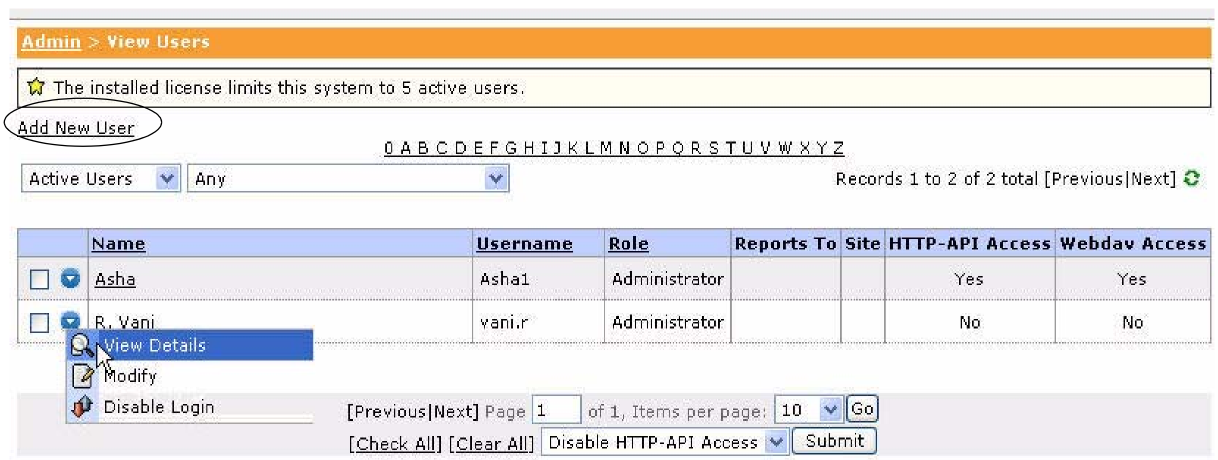


Figure 15.3 User List

15.3.1 Adding a New User

You can add new users. These users can be employees or contacts who can access the application.

To add a new user follow the steps listed below:

1. Click **Add New User**, as shown in **Figure 15.3**.

   The **Add User** page is displayed, as shown in **Figure 15.4**.

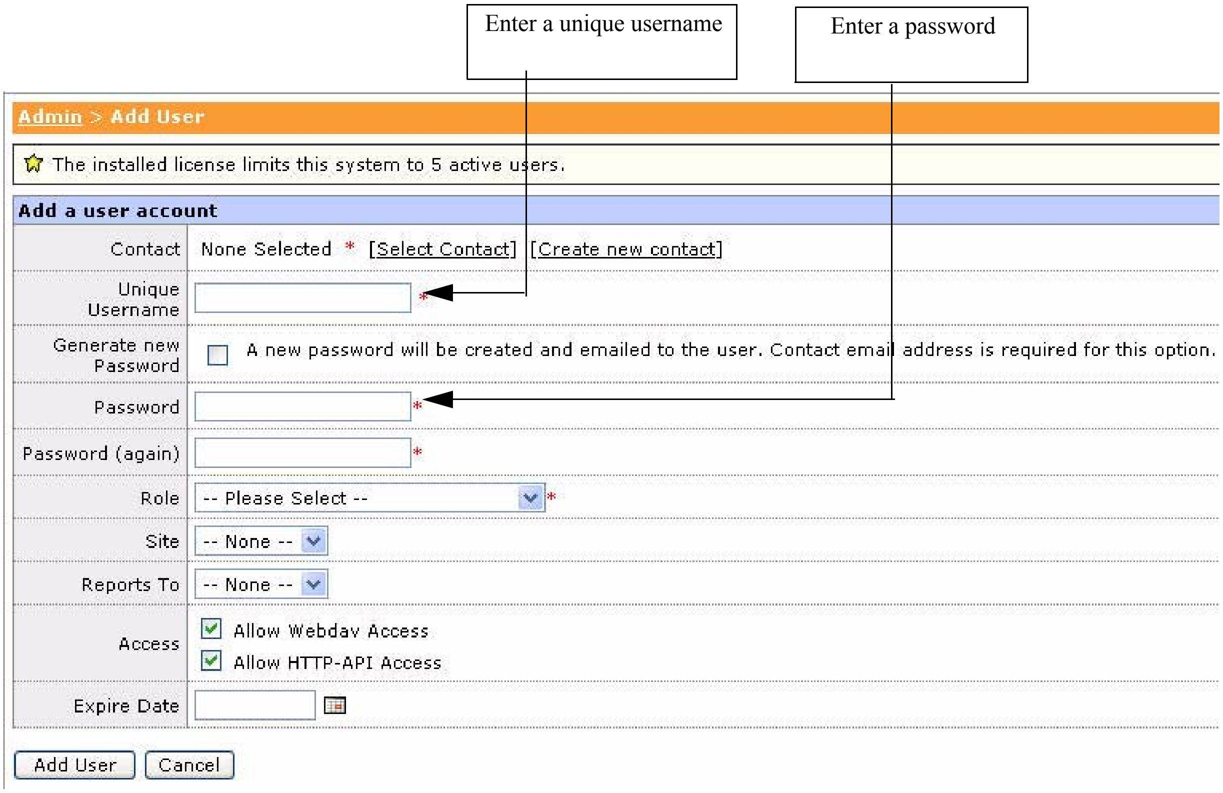


Figure 15.4 Adding a New User

2. Enter a unique user name for the user. You can specify the password or select the option to generate a new password, as shown in **Figure 15.5**.

Figure 15.5 Generating a New Password

3. Click **Add User**, after entering all the relevant details.

   The **View Details** page is displayed showing the details of the new user, as shown in **Figure 15.6**.

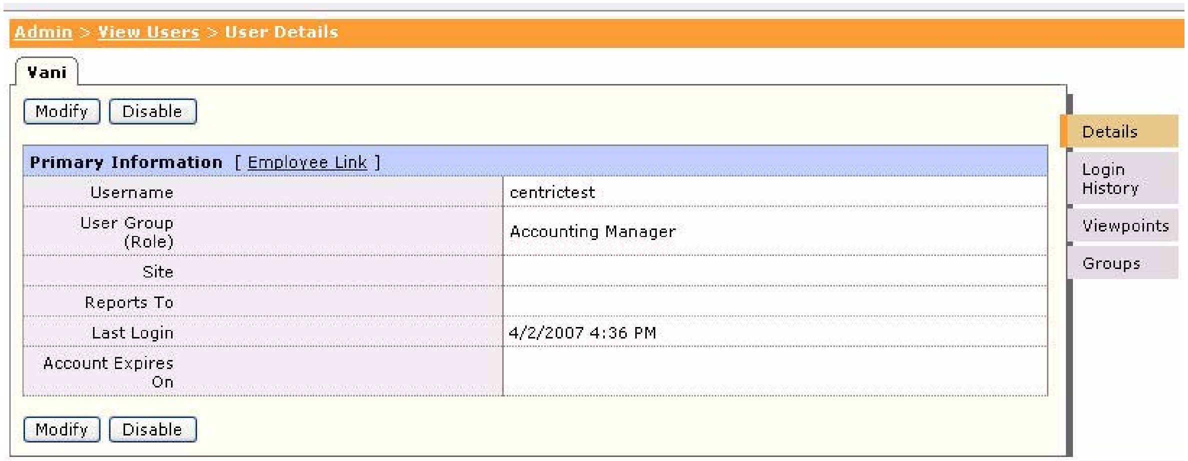


Figure 15.6 Viewing the New User Details

15.3.2 Viewing and Modifying User Details

You can view user details by selecting **View Details** from the context menu, as shown in **Figure 15.3** or clicking a name. The following details are displayed in the **User Details** page, as shown in **Figure 15.7**.

- Username
- User Group (Role)
- Person to whom the user reports
- Last Login date
- User account expiry date

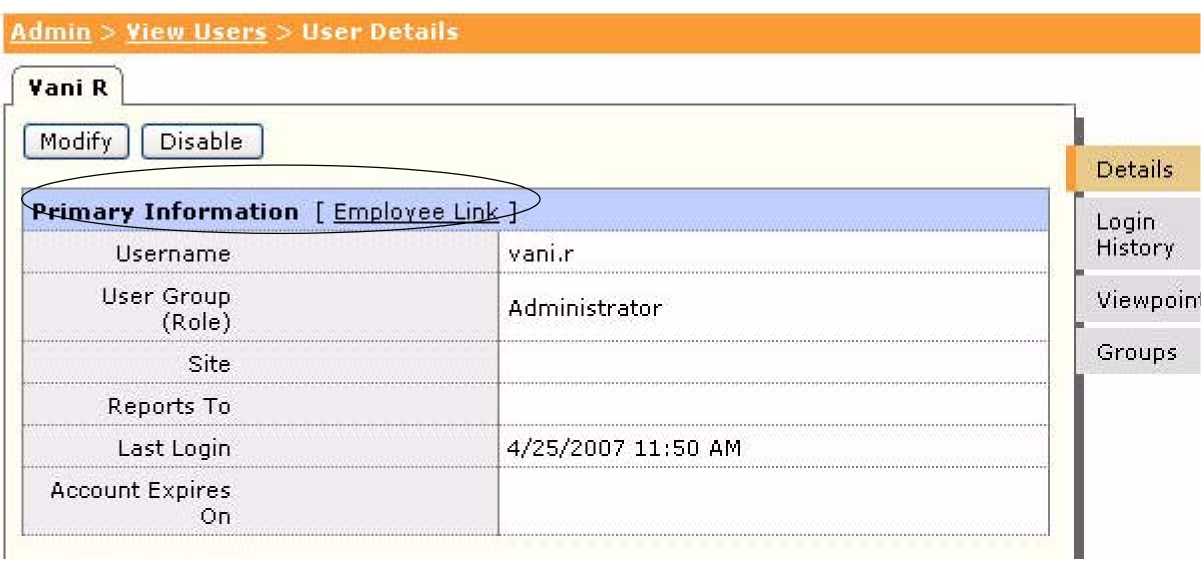


Figure 15.7 User Details Page

Selecting **Modify** on the **User Details** page, displays the **Modify User** page, as shown in Figure 15.8 which allows you to modify the following details:

- Modify the username and role
- Report account expiration
- Modify the user's password

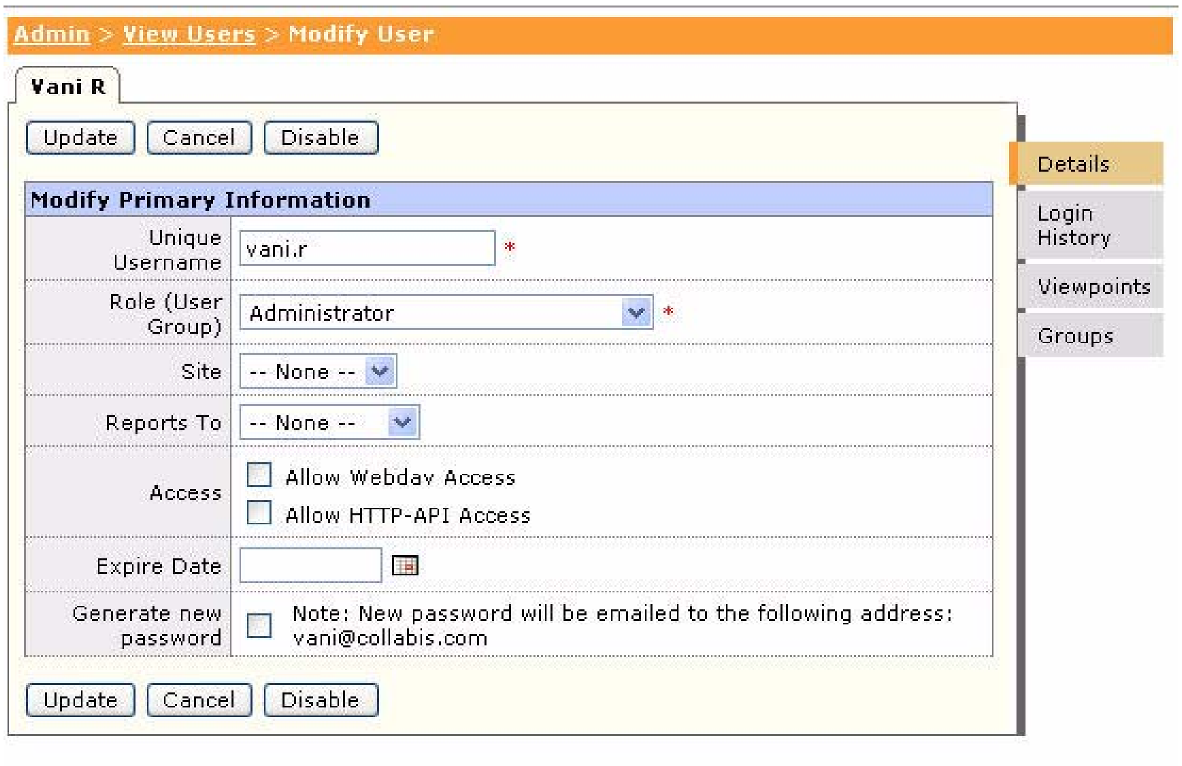
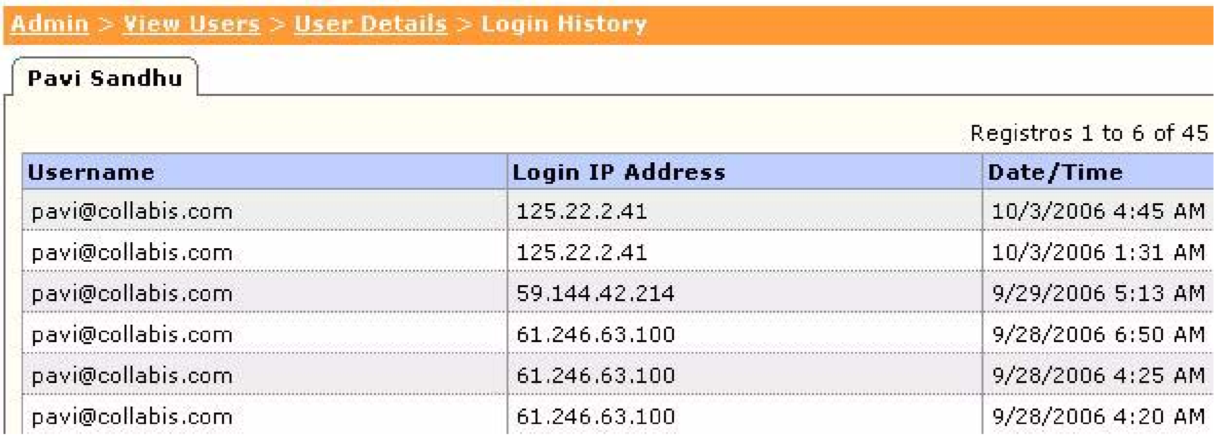


Figure 15.8 Modify User Page

Checking the check-box **Generate new Password** sends an email to you informing the generated new password.

15.3.3 Viewing Login History

Clicking the **Login History** sub-tab on the **Modify Users** page displays the **Login History** page, as shown in Figure 15.9. This page provides login details such as the date of login, time of login and login IP address.



Admin > View Users > User Details > Login History

Pavi Sandhu

Registros 1 to 6 of 45

Username	Login IP Address	Date/Time
pavi@collabis.com	125.22.2.41	10/3/2006 4:45 AM
pavi@collabis.com	125.22.2.41	10/3/2006 1:31 AM
pavi@collabis.com	59.144.42.214	9/29/2006 5:13 AM
pavi@collabis.com	61.246.63.100	9/28/2006 6:50 AM
pavi@collabis.com	61.246.63.100	9/28/2006 4:25 AM
pavi@collabis.com	61.246.63.100	9/28/2006 4:20 AM

Figure 15.9 Login History

15.3.4 Using Viewpoints

Viewpoints allows one user to view another user's data. This feature is useful when you want to share data in the system with others who are not in your direct line of reports.

Select the user to whom you want to give a different viewpoint. Clicking **Viewpoints** on the **User Detail page** displays the **Viewpoints** page, as shown in Figure 15.10.

Figure 15.10 Viewpoints Page

You can add new viewpoints by clicking **Add New Viewpoint link. Add Viewpoint** page is displayed allowing you to modify or delete existing viewpoints, and create new ones, as shown in Figure 15.12.

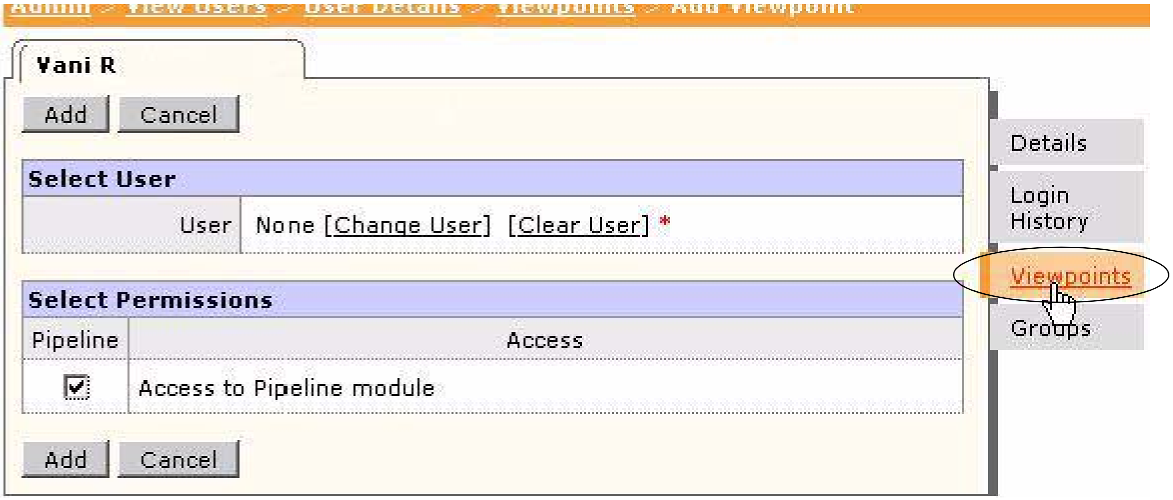


Figure 15.11 Add Viewpoint Page

Select the user whose data you want the current user to view, and specify the access permission for the module you wish the user to access. Clicking **Add** takes you to the **Viewpoints** page with the details of the new viewpoint, as shown in **Figure 15.12**.

Figure 15.12 View Points Page

On this page, when you click the action icon beside the new viewpoint, a context menu is displayed with the options to view, modify and delete the viewpoint.

Since the viewpoint specified above gives access to the **Pipeline** module, you can view the viewpoint on the **Dashboard** page of the **Pipeline** module. The dashboard view of the opportunities is shown in **Figure 15.13**.

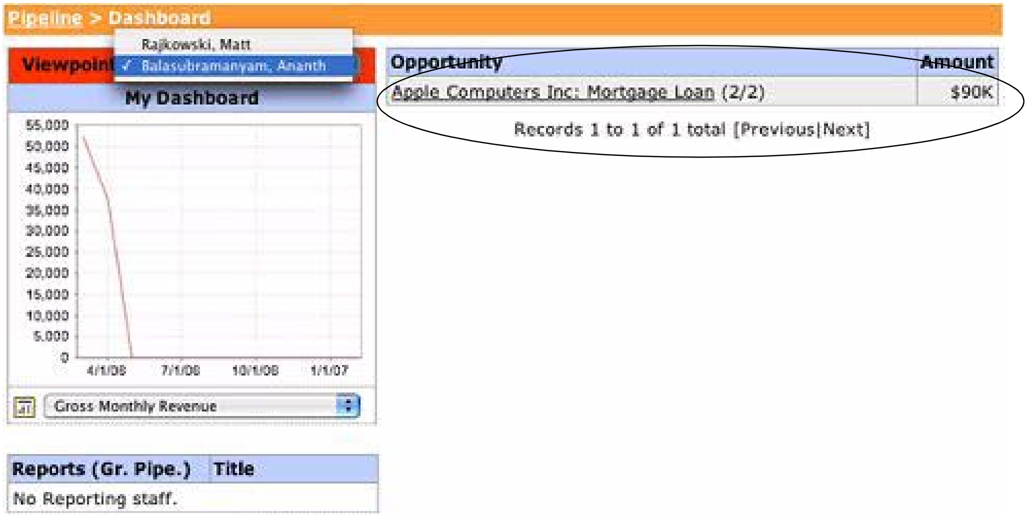


Figure 15.13 Viewing Viewpoints on the Pipeline Dashboard

15.4 Managing Roles

Roles control what users can view, create, modify, and delete on the system. Each user is assigned only one role for a department. Hence, a user can have any number of roles, depending on the number of departments. For example, you may create one role for sales, one for marketing, and one for customer support.

You can configure roles by module, and define rights for the following tasks:

- View data in the system
- Add data to the system
- Edit data in the system
- Delete data in the system

You can navigate to the roles section by clicking **Manage Roles** from the **Admin** page. This displays a page that lists all the roles currently defined in the system, and provides the opportunity to add new roles, as shown in **Figure 15.14**.

Figure 15.14 View Roles Page

Clicking the action icon located to the left of each role, displays a context menu which provides options to modify or delete a role. You can create a new role by clicking the **Add New Role** link located at the top of the page.

Modifying an existing role or adding a new role creates a page with a grid of the various data that can be controlled and organized by the module. When you modify an existing role, the grid will contain the current permissions, but when you create a new role, all permissions are turned off by default. Check the checkboxes to turn permissions on or off. You can update the role by selecting **Update Role**.

Clicking **Update Role** displays a page, as shown in Figure 15.15. This page displays the modules and permissions for each part of the application separately.

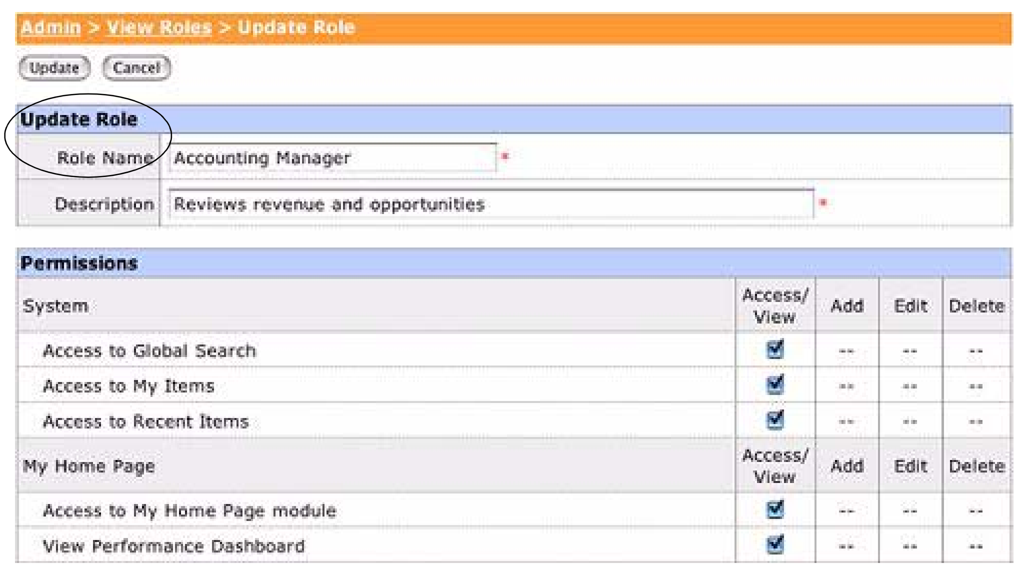


Figure 15.15 Role Permissions Based on User Roles

15.5 Managing Portal Roles

A portal user can be the customers or vendors of your company. Administrators can define roles and set permissions for portal users by allowing access to a few modules and restrict permission to other modules. The administrator can specify access to accounts, documents and projects modules.

For example, consider a contact related to an account. This contact can view details pertaining to his account only.

This portal user can be given access for the following tasks:

- View account records, contact details, service contracts, assets, tickets, ticket activities, documents, project records, document modules, and document stores related to his account
- Add tickets and documents

This portal user is restricted permission to edit and delete any information.

The **Manage Portal Roles** section enables the administrator to specify these permissions.

Note: As per the license agreement the number of active users for this system is restricted to five, however portal users bypass this license agreement.

To specify permissions for portal users click **Manage Portal Roles**, as shown in Figure 15.16.

Figure 15.16 Viewing Admin Page

The **View Portal Roles** page is displayed, as shown in **Figure 15.17**

Figure 15.17 Viewing the View Portal Roles Page

15.5.0.1 Adding New Portal Roles

You can define new portal roles specifying the permission to access the modules. To add a new portal role follow the steps listed below:

1. Click **Add New Portal Role**, as shown in **Figure 15.17**.

The **Add Portal Role** page is displayed, as shown in **Figure 15.18**.

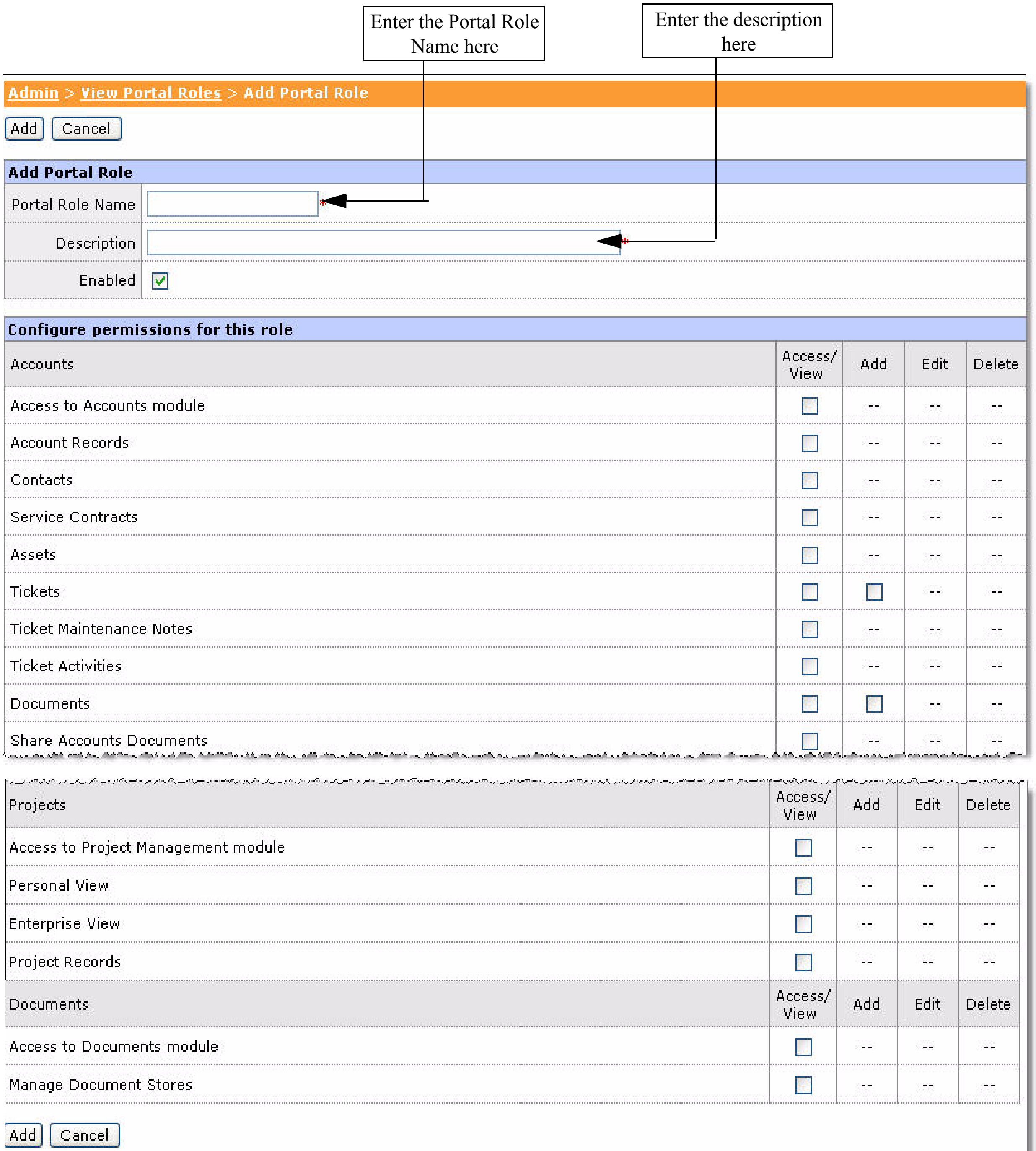


Figure 15.18 Viewing the Add Portal Role Page

2. Enter the **Portal Role Name**, a short description and specify the permissions.

   You can specify the permissions for the **Accounts**, **Projects** and **Documents** modules.

3. Click **Add**.

The **View Portal** page with the name of the newly defined portal role is displayed, as shown in **Figure 15.19**.

Figure 15.19 Viewing the Newly Created Portal Role

15.6 Configuring Modules

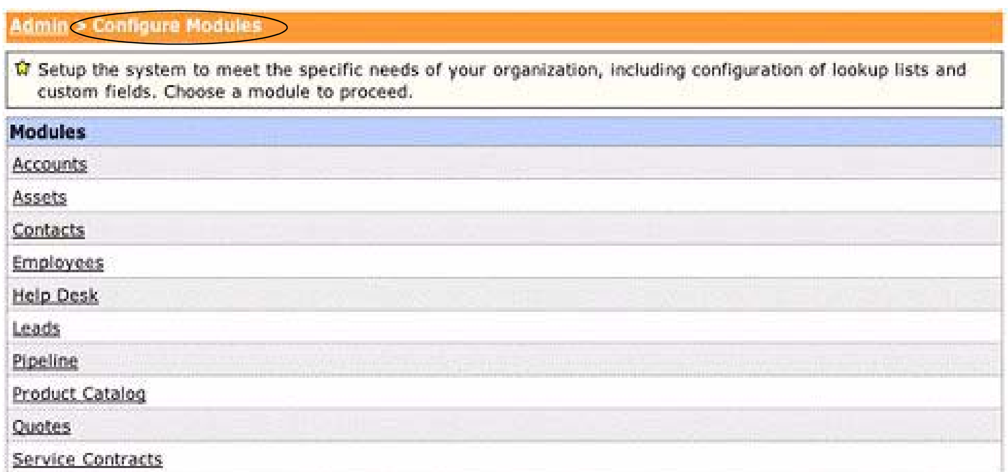


Figure 15.20 Configuring Modules

The **Configure Module** feature enables you to modify and configure a variety of information and capabilities in many of the Centric CRM modules. Clicking **Configure Modules** on the **Admin** page displays the **Configure Module** page, as shown in **Figure 15.20**. The capabilities currently provided by this module are:

- **Accounts**, which allows you to configure the following options:
  - Action Plan Editor
  - Custom Folders & Files
  - Lookup Lists
- **Assets**, which allows you to configure the following options:
  - Categories
  - Lookup Lists
- **Contacts**, which allows you to configure the following options:
  - Custom Folders & Fields
  - Lookup Lists

- **Employees**, which allows you to configure the following options:
  - Custom Folders & Fields
  - Lookup Lists
- **Help Desk**, which allows you to configure the following options:
  - Action Plan Editor
  - Categories
  - Custom Folders & Fields
  - Lookup Lists
  - Object Events
  - Scheduled Events
- **Leads**, which allows you to configure Lookup Lists
- **Pipeline**, which allows you to configure the following options:
  - Custom Folders & Fields
  - Lookup Lists
- **Product Catalog**, which allows you to configure the following options:
  - Lookup Lists
- **Quotes**, which allows you to configure the following options:
  - Lookup Lists
  - Logos
- **Service Contracts**, which allows you to configure Lookup Lists.

15.6.1 Creating Custom Folders and Fields

This module enables you to create and use folders. Folders help you in extending the database, and hence the functionality of Centric CRM without any programming. Folders provide interactive forms in which you can store information for later viewing, export, or reporting. The page that is displayed after clicking **Accounts** on the **Configure Modules** page is shown in **Figure 15.21**.

To create a new folder in the **Accounts** module, click **Configure Modules** and select **Accounts**. Click the link **Custom Folders and Fields**.

Figure 15.21 Configuration Options For Accounts

The page displayed may contain some folders already created, as shown in Figure 15.22. Click **Add a Folder to this Module** to create a new folder.

Figure 15.22 Existing Custom Folders

The resulting page allows you to name the folder and check any/all of the following checkboxes, as shown in Figure 15.23:

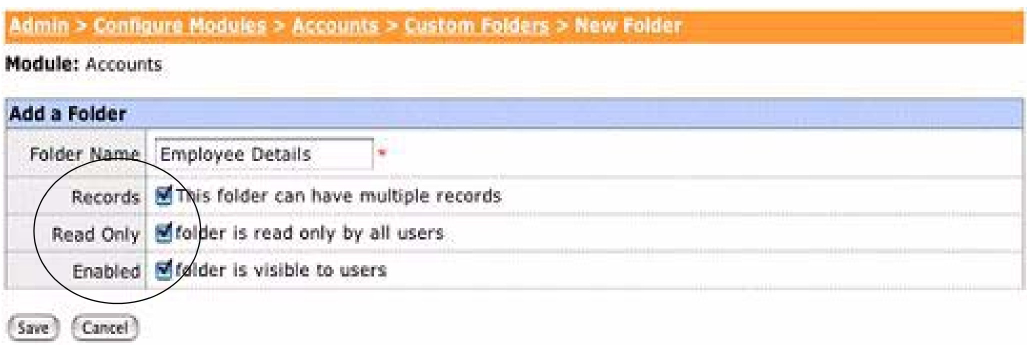


Figure 15.23 Adding a New Folder to Module

- A checkbox to signify whether the folder can have multiple records.

  If you have stored demographic data, you cannot have multiple records. If you have stored a record of faxes received from a customer, then you can check this checkbox.
- A checkbox to signify that the folder is read only.

  You can check this if Centric CRM is importing data from another application at regular intervals. You might want users to view the data, but not modify the same.
- A checkbox to enable the folder, and make it visible to others.

  You can leave this checkbox blank if you are using a folder for brainstorming and do not want other users to view it until you have finished.

To edit information from a folder, click the folder name, or the **Edit** link to the left of folder name, as shown in Figure 15.24. You can move a folder or delete it.

Figure 15.24 Folder Details

Clicking a folder name displays a **Folder** page, as shown in **Figure 15.25**. Folders allow you to build logical grouping of data fields. Add a group by clicking **Add a Group for this Folder**.

Figure 15.25 Folder Page

The **New Group** page is displayed, as shown in **Figure 15.26**. Specify the name of the group and click **Save**.

Figure 15.26 New Group Page

You will be taken to a page, as shown in **Figure 15.27**, wherein you can edit, delete and add custom fields. This page displays the name of the created group.

Figure 15.27 Folder Page Displaying the New Group

Click **Add a Custom Field**, and you will be taken to a page, as shown in **Figure 15.28**.

Boxes that have a red asterisk next to them represent fields that are mandatory. You may create any custom field for other information. The field **Additional Text to Display** is optional and may be used to enter some additional information. Check the **Required at Data Entry** checkbox if you require this field and want it to be displayed as Enabled. Clicking **Save** displays the folders with new fields that you have just created.

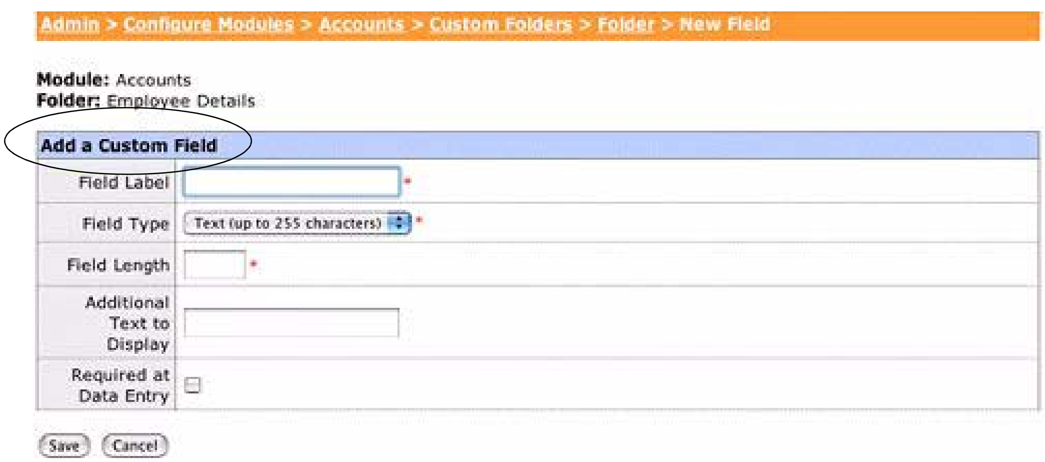


Figure 15.28 Adding Custom Field

You can edit the field using the options, as shown in **Figure 15.29**.

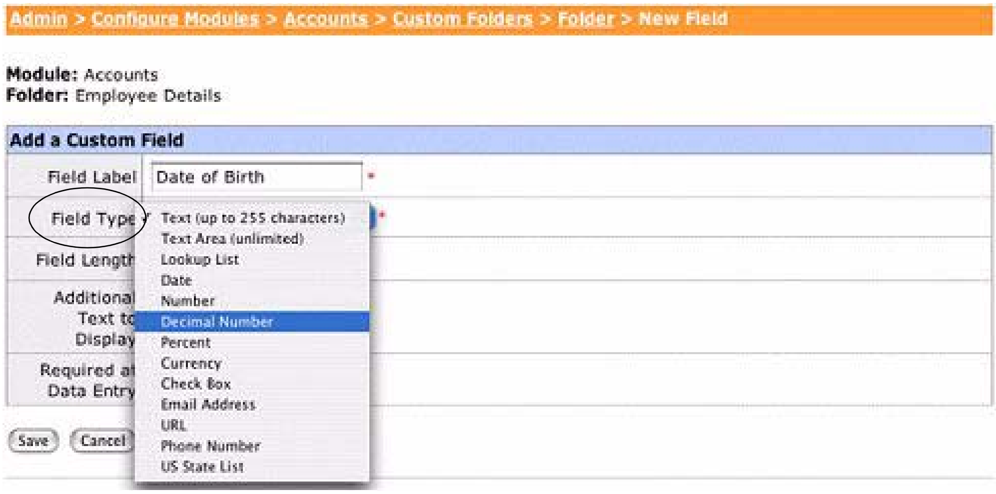


Figure 15.29 Editing Fields

15.6.2 Using Action Plan Editor

Action plans in the **Accounts** module are created from generic templates. **Action Plan Editor** enables you to create these generic action plan templates that can be used in the **Accounts** module.

To create a sample action plan template, click **Configure Modules**, select **Accounts**. Click **Action Plan Editor** and select **Edit** from the page, as shown in **Figure 15.30**.

Figure 15.30 Edit Action Plans Related to Accounts

The page displayed may have some action plan templates. The following options will be provided to you:

- **Add Action Plan**
- **Configure Categories**

Clicking **Configure Categories** displays a pop-up window allowing you to edit the action plan categories. For more information on the categorization, refer to **Section 15.6.6, "Organizing Helpdesk Categories"**.

The action plan templates list provides an overview of the action plans and the number of instances that have been created for the template, as shown in **Figure 15.31**. Click **Add Action Plan**.

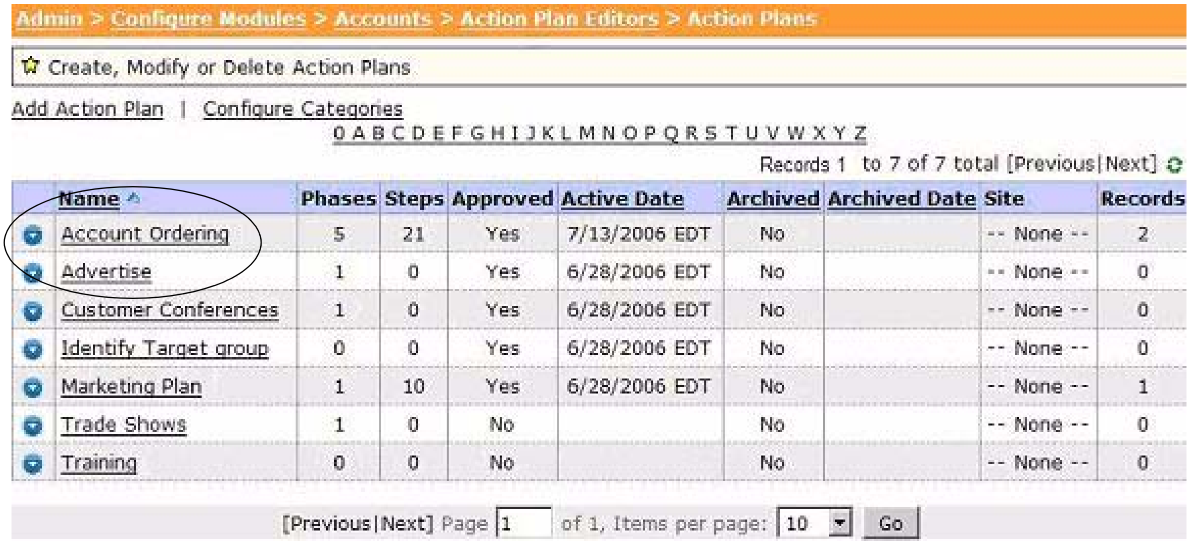


Figure 15.31 List of Action Plan Templates

The Add Action Plan page is displayed, as shown in Figure 15.32.

Enter the name of the action plan template and provide a description for it. While creating an action plan, do not approve it before completely editing the phases and steps of the plan. Approved action plan templates are readily available in the **Accounts** module to create action plans.

Specify the category for the plan, if you have created action plan categories. After entering the above information, click **Save**.

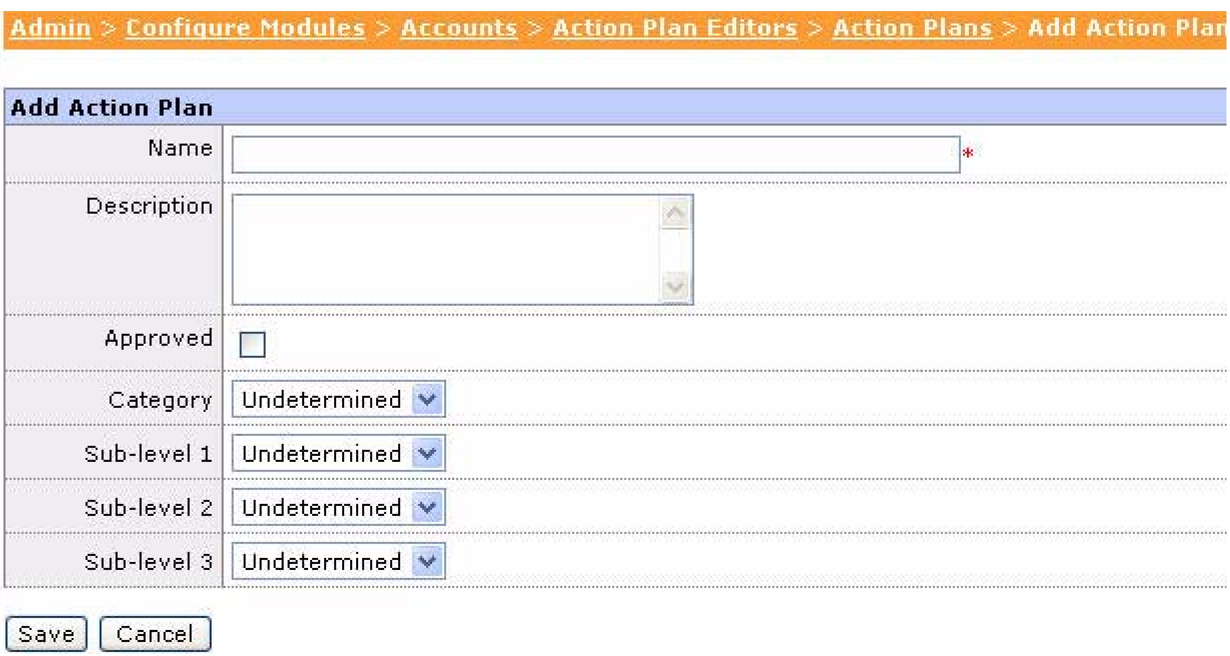


Figure 15.32 Add Action Plan Template

The details page of the **Action Plan Template** is displayed. An action plan template consists of one or more phases each with one or more steps. Each phase is executed in a sequence from top to bottom. To add a new phase, click **Add a Phase**.

This displays a pop-up window with a form to add the phase information, as shown in Figure 15.33.

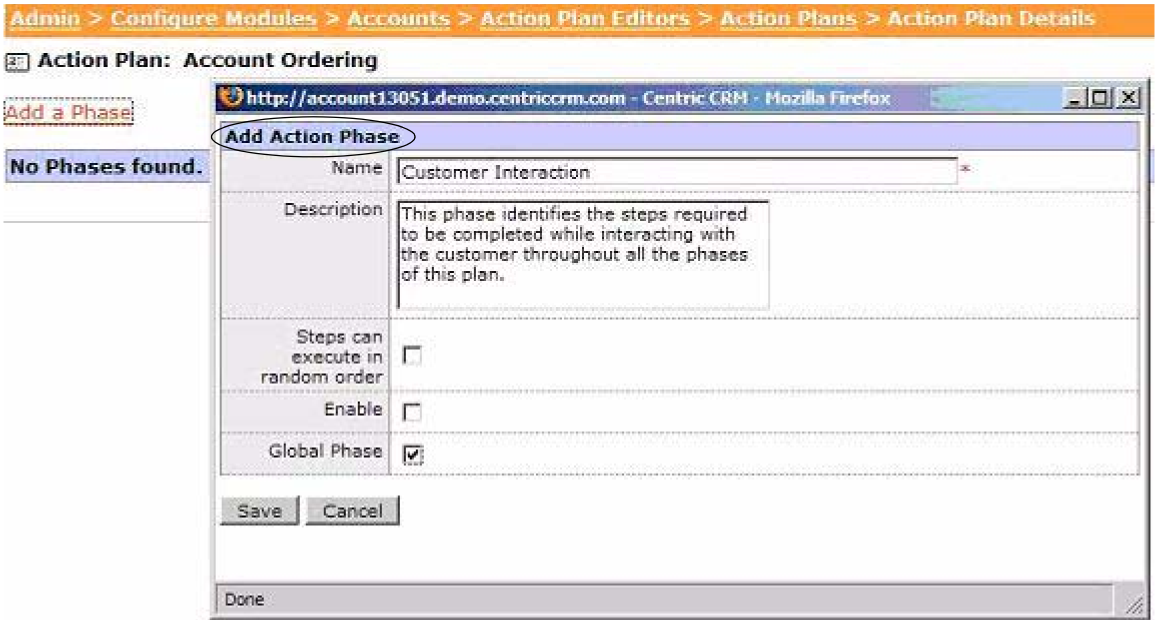


Figure 15.33 **Action Plan Templates Details Page**

The fields to be entered in the form are specified below:

- **Name** - indicates the name of the phase to be displayed in the action plan
- **Description** - a brief description of the phase

  This information is not displayed in the action plan instances.
- **Steps can execute in random order** - checking this check-box indicates that the steps can be completed in random order

  The sequence of steps in this phase does not matter. All steps of the phase have to be completed to proceed to the next phase.
- **Enable** - checking this field indicates that the phase is activated
- **Global Phase** - checking this check box indicates that the phase need not be executed in a sequence

  There can only be one global phase per template.

Click **Save** to add the phase to the action plan template. The phase is displayed in the **Action Plan Details** page.

The following options are available for the phase:

- **Move Up** - moves a phase up by one unit

  Valid for non-global phases.
- **Move Down -** moves a phase down by one unit

  Valid for non-global phases.
- **Add Step** - allows you to add a step to the end of this phase
- **Add a Phase before this Phase** - allows you to add a phase above this phase

- **Add a Phase after this Phase** - allows you to add a phase next in the sequence of phases
- **Modify Phase** - which allows you to modify the phase in a popup window
- **Delete Phase** - which allows you to delete the current phase and steps

  If instances of the action plan template already exist, the phase cannot be deleted.

To add a step to this phase, click **Add Step**, as shown in Figure 15.34.

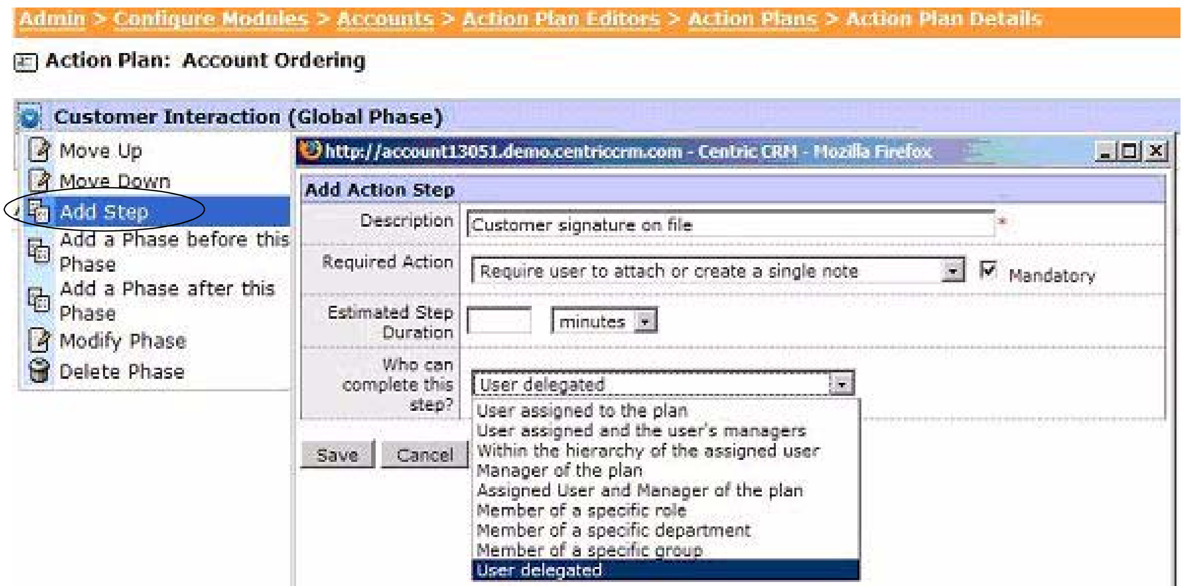


Figure 15.34 Add Step in Action Plan Template Details Page

The fields to be entered in this form are as specified below:

- **Description** - indicates the name of the step to be displayed in the plan
- **Required Action** - indicates the action to be performed before completing a step

  Several such options are included for action plan templates. Checking the **Mandatory** checkbox indicates that the action is mandatory and this step cannot be completed without completing the required action.
- **Estimated Step Duration** - which indicates the period of time required to complete this step

  This time period is not enforced as a constraint.
- **Who can complete this step?** - which determines the owner of the step

  The options available are:
  - User assigned to the plan
  - User assigned and the user's managers
  - Within the hierarchy of the assigned user
  - Manager of the plan
  - Assigned User and Manager of the plan
  - Member of a specific role

- Member of a specific department
- Member of a specific group

  This option allows you to select a specific group for the step at the time of creation, but the **User Group** option for **Ticket Action Plans** allows the ticket's user group to complete the step.
- User delegated

  This option is similar to the user assigned to the plan.

- **Skip to Here** - which allows the current step to be completed out of order

  You can complete this step and skip all other steps before it. This option must be used only for steps whose completion makes all previous steps, which were not completed, invalid. This option is not available for steps of the **Global Phase**.

Enter the information for the step and click **Save** to add the step at the end of the phase for the action plan template. A sample action plan is shown in **Figure 15.35**. The steps of the phase have options similar to the phase in the options to the left of the step description. This allows steps to be moved relative to other steps in the phase.

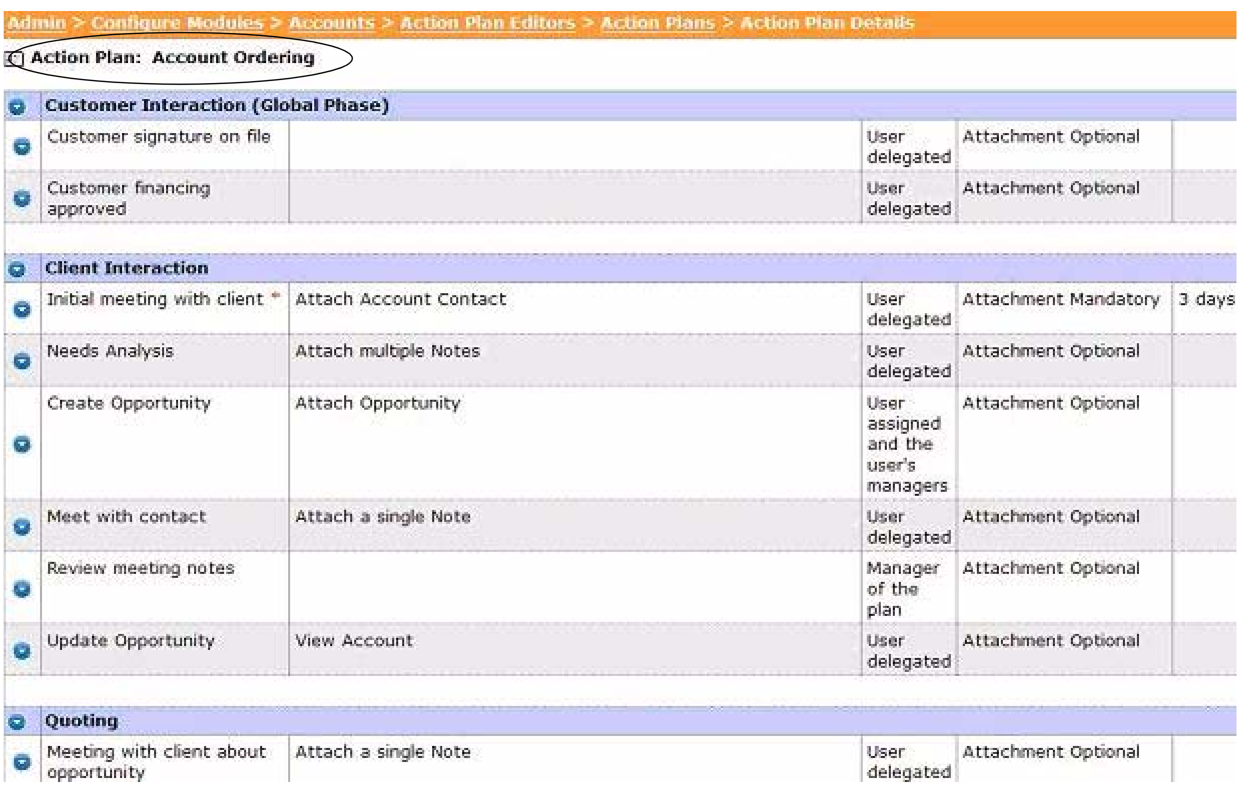


Figure 15.35 A Sample Action Plan Templates Detail Page

The following options are available for the steps.

- **Move Up** - which moves the step up by one unit
- **Move Down** - which moves the step down by one unit

- **Add a Step before this Step** - which allows users to add a step before the current step in sequence
- **Add a Step after this Step** - which allows users to add a step next in sequence with the current step
- **Modify Step** - which allows users to modify the current step
- **Delete Step** - which allows users to delete the current step

  If instances of the action plan already exist in the **Accounts** module, the step cannot be deleted.

On completing the phases and steps of the action plan template, it can be set as **Approved** from the list page. You can access the action plan template from the **Accounts** module to create action plans.

15.6.3 Modifying Lookup Lists

You can modify most of the options in the Centric CRM modules by clicking the **Lookup Lists** link. This displays a page listing all the lookup lists that can be configured for that module, with options to preview and edit the lists, as shown in Figure 15.36.

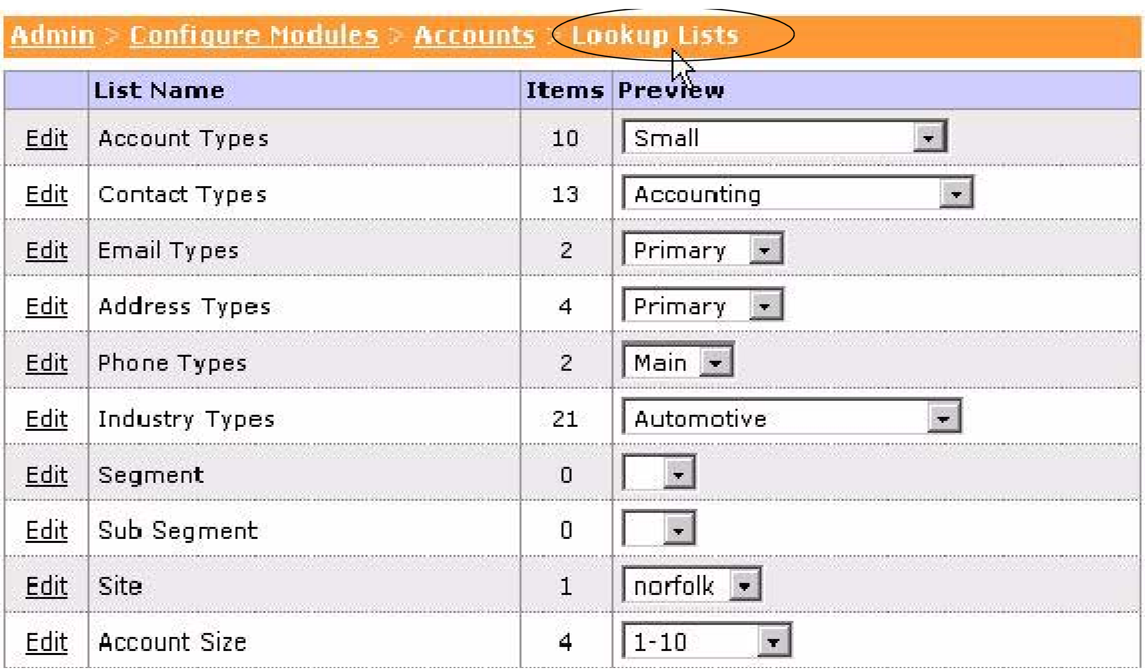


Figure 15.36 Account Lookup Lists

The editing screen displays a blank field on the left with an **Add** tab, as shown in Figure 15.37. It also displays a list of current values with tabs to perform the following tasks:

- Move the values up or down
- Sort the values
- Remove values
- Rename the values

Figure 15.37 Editing a Lookup List

To perform any task, select an entry and click one of the tabs. To add a new entry, enter its name in the field on the left, and click **Add**.

You must pay attention to the initial configuration of the lookup lists to get the lists right. The lookup lists are used in reports and in communications to aid you in classifying your data.

15.6.4 Accessing Sites/Territories

The site feature enables secure management of accounts and users into several sites/territories. The users of each site can access information of that specific site only. They are restricted from accessing information from other sites. The main **None** site users can manage all other site information such as accounts, contacts, and users.

The site lookup list is blank by default. With no entries in the site lookup list, all accounts and users belong to the **None** site. You can create new sites by editing the lookup list. Accounts or users can be added to any one of the sites in the list, or the **None** site. The users of site 'A' can never be the manager of the users of another site 'B', or the **None** site. The **None** site users can be managers of users belonging to several sites.

Caution: The application enforces a strict security policy regarding sites.

15.6.5 Organizing Asset Categories

The **Contracts** and **Assets** tab in the **Accounts** module help you in providing contracted maintenance, or support, or recurring payments on goods or services under contract. For more information on the **Accounts** module, refer to **Chapter 6, "Managing Accounts"**.

Assets refer to hardware and software, and contracts refer to the legal agreements about assets that you have with vendors or customers. The assets are generally physical items such as computers, telephones, or automobiles. The assets can also be service oriented such as software. An asset can be covered by a contract, but it is not mandatory.

The main **Assets** page in **Admin** is shown in **Figure 15.38**.

Figure 15.38 Configuration Options for Assets

The **Admin** module has the following configurable options for **Assets**:

- **Lookup Lists** - allows you to modify options
- **Categories** - allows you to classify the asset

To manage asset categories, click the **Categories** link, and select **Edit** beside **Asset Categories**, as shown in **Figure 15.39**.

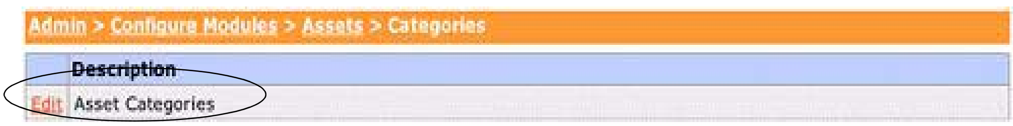


Figure 15.39 Asset Categories

An **Active Categories** page is displayed, as shown in **Figure 15.40**. This page is an interactive editor that helps you define and modify levels of **Asset Categories**. Depending on your installation, the levels may be ready for you to enter definitions.

All categories are unique to their site/territory. You can view the categories of a site by selecting the site from the drop down list of sites on top of the page. The following tabs at the top of the editor window are displayed:

- **Active Categories**
- **Draft Categories**

In **Active Categories**, you can view the settings that are currently defined for the specific site. Selecting the **Draft Categories** takes you to an editor that looks exactly like the **Active Categories**, except for the **Edit** tabs in each level column. **Draft Categories** can be edited for different sites.

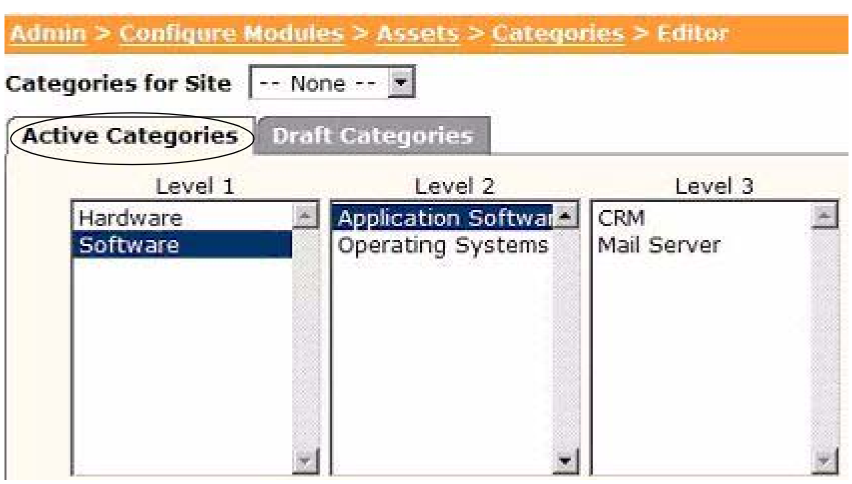


Figure 15.40 Asset Category Editor - Active Categories

This tab enables you to edit the selections in each column, as shown in Figure 15.41.

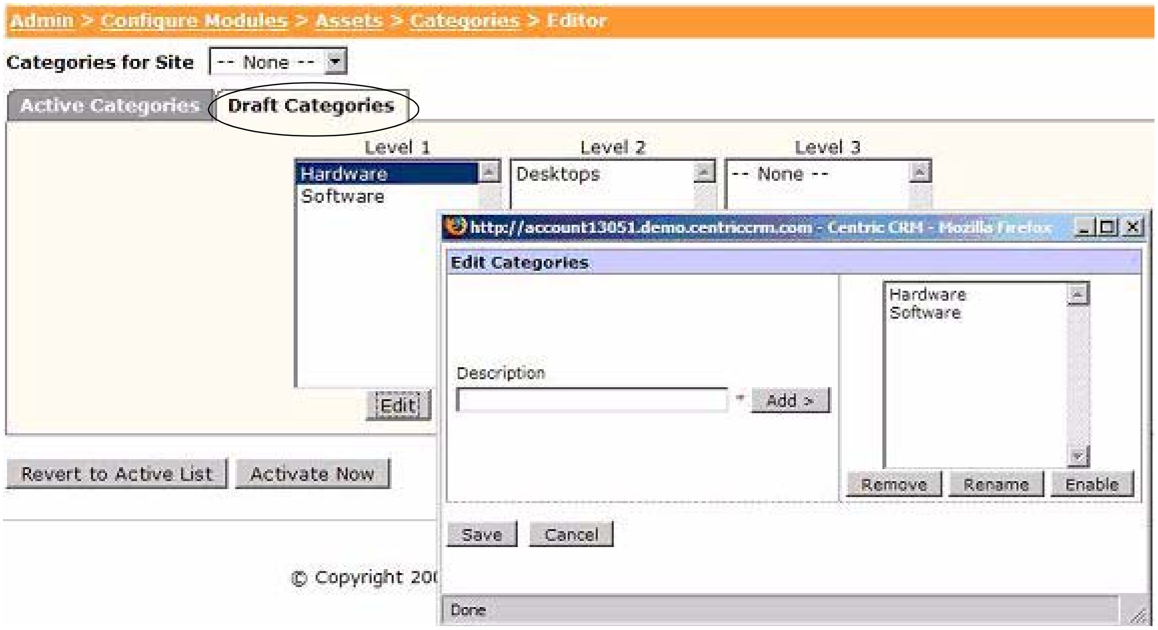


Figure 15.41 Asset Category Editor - Draft categories

After editing the levels and values, click **Save** in the **Editor** page. Click **Activate** in the **Draft Categories** page to confirm the modifications. This displays the **Active Categories** page with all the modifications applied. You can classify assets using the categories you defined. Organizing your assets helps you to query the **Help Desk** or **Account Asset** sections with detailed reports later on.

Custom folders and fields, lookup lists and categories are common to many of the configurable modules.

15.6.6 Organizing Helpdesk Categories

The **Help Desk** module enables you to classify customer or internal issues. For more information on the Help Desk module, refer to Chapter 11, "Accessing the Help Desk". Click **Configure Modules** on the **Admin page**, and select **Help Desk**. The **Help Desk** main page is displayed, as shown in Figure 15.42.

Figure 15.42 Help Desk Main Page

Click **Categories** and select **Edit Ticket Categories**. You can edit the categories as you did in **Assets**.

The issue description, categorization, and solution information are stored in a database. You can use this database to operate the **Knowledge Base** in the **Help Desk** module. If the problem is categorized, and the solution is well-documented, you can use a category page to search for the solution to a problem.

Ticket Categorization can also be used for ticket assignment and action plan selection in the ticket **Add** and **Modify** pages. Click **Assignment** for ticket assignment. You must enter the following fields, as shown in **Figure 15.43**:

- **Department** - indicates the department of the assigned user of the ticket
- **Resource Assigned** - indicates the user belonging to the previously selected department who is assigned the ticket
- **Assigned Group** - indicates the user group to which the ticket is assigned

- **Action Plans** - allows you select an action plan from the set of action plans.

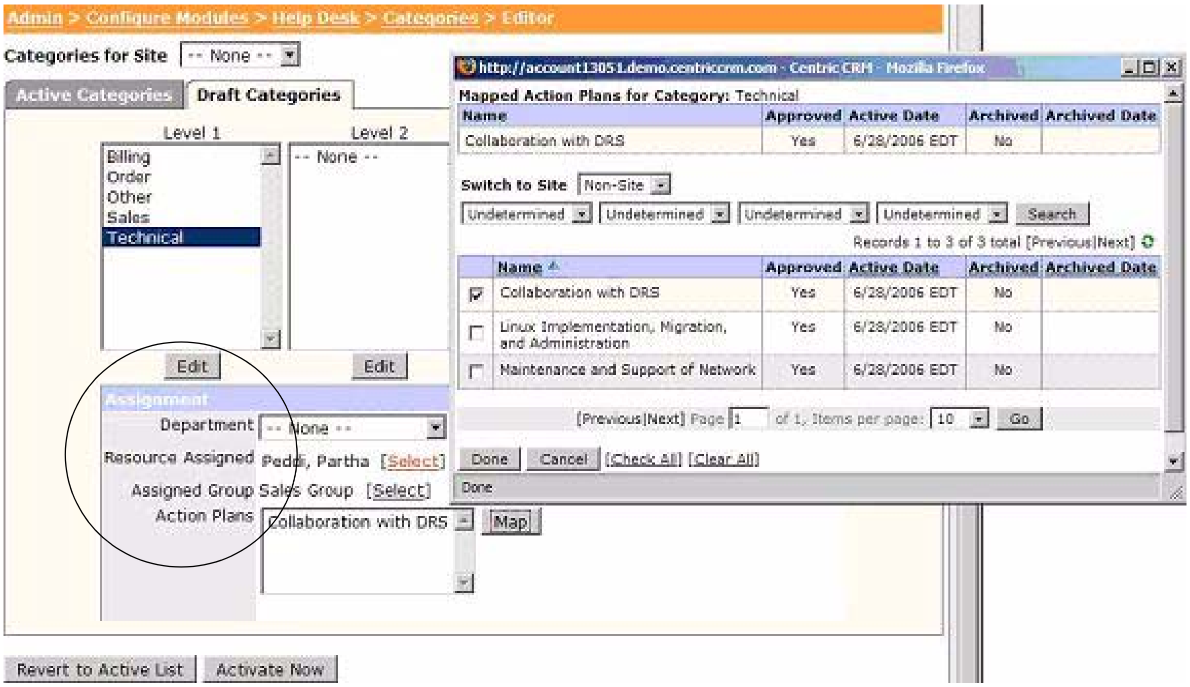


Figure 15.43 **Help Desk Categories and Ticket Assignment**

15.6.7 Configuring the Object Events and Scheduled Events

The **Admin** page provides the following configuration options for a help desk:

- **Object Events**. You can select this option by clicking **Object Events**, as shown in Figure 15.42. This page enables you to insert and update ticket objects.
- **Scheduled Events**. You can select this option by clicking **Scheduled Events.** This page enables you to access ticket notifications.

Figure 15.44 **Object Events**

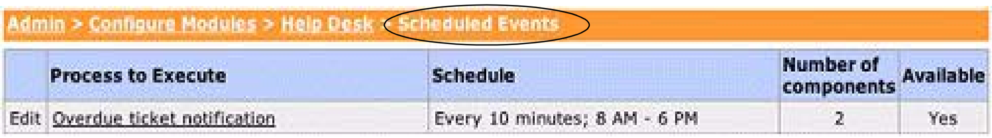


Figure 15.45 Scheduled Events

Object Events and **Scheduled Events** are a set of workflow rules activated by actions in the system. Click **Object Events** to view the details page, as shown in Figure 15.44. In **Object Events**, the workflow is activated when a ticket is entered or closed.

The **Process Details** page, which allows you to insert a ticket object is shown in Figure 15.46.

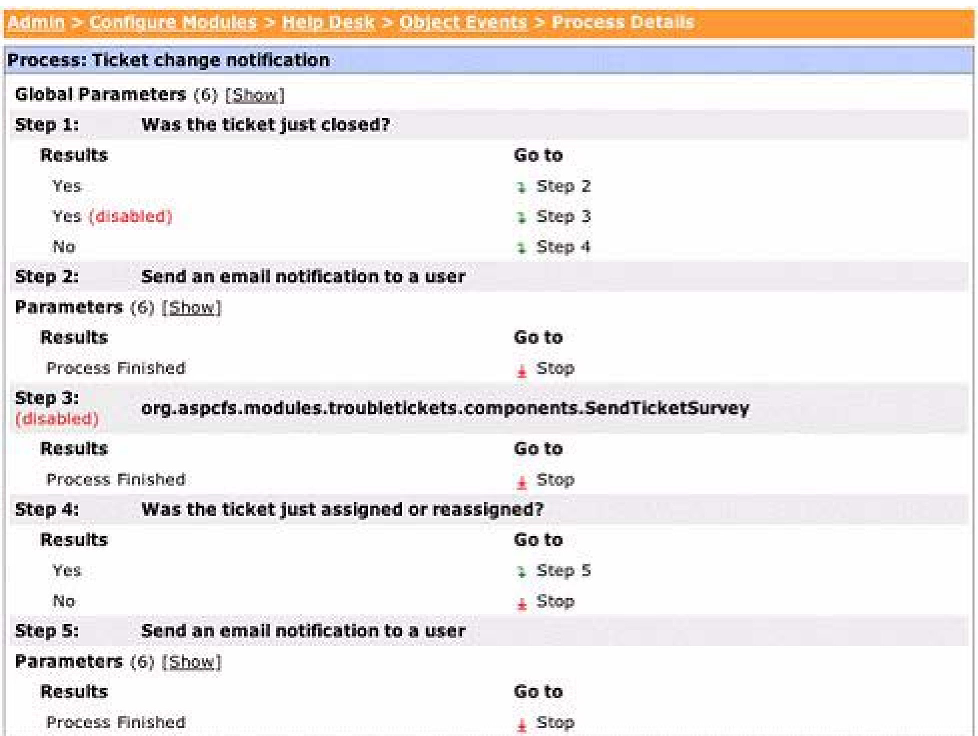


Figure 15.46 Insert Ticket Object

Note: In both the options, you can hide or show the global parameters. The pages displayed when global parameters are hidden and shown are shown in Figure 15.47 and Figure 15.48.

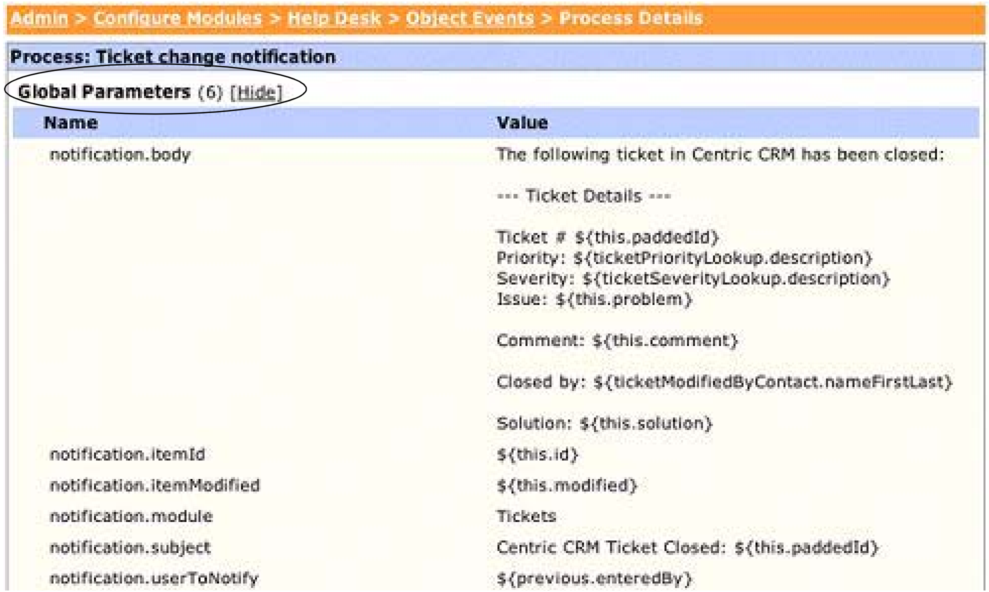


Figure 15.47 Ticket Change Notification: Global Parameters Hidden

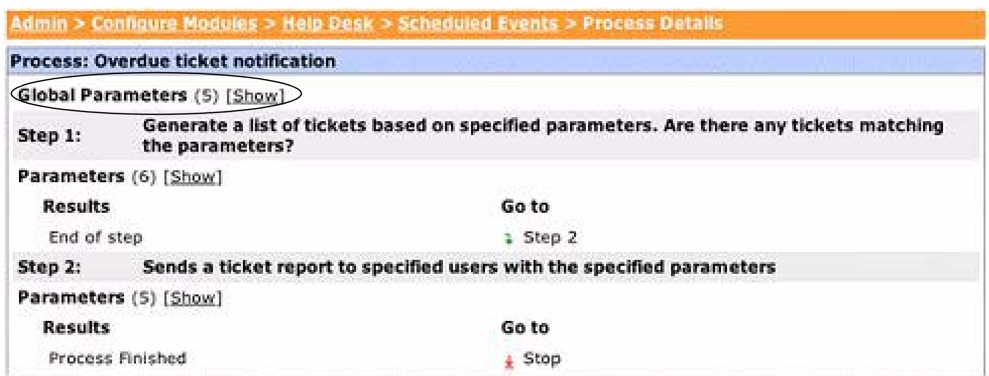


Figure 15.48 Ticket Change Notification: Global Parameters Shown

Click **Scheduled Events** to view the details page, as shown in **Figure 15.45**. In **Scheduled Events**, workflows are activated by timing, for example, every hour or every day. The **Scheduled Events** page with global parameters displayed, is shown in **Figure 15.49**.

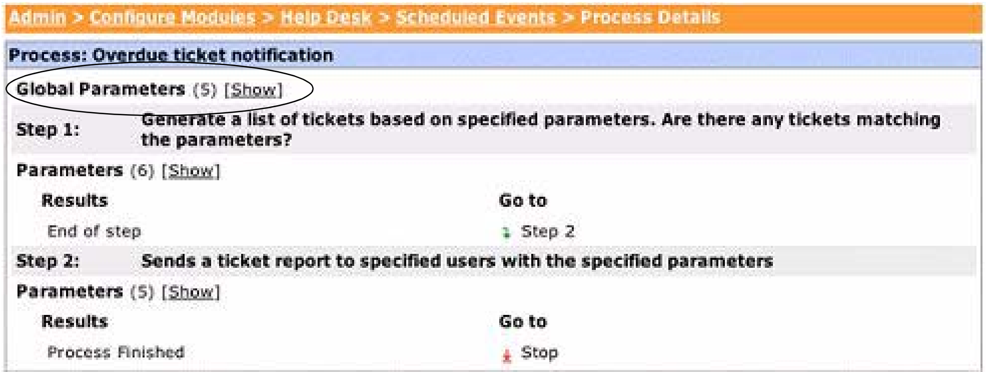


Figure 15.49 Scheduled Event: Global Parameters Shown

15.6.8 Configuring the Product Catalog

The **Admin** section provides a web based interface to configure and manage your company's **Product Catalog**.

Figure 15.50 Product Catalog Main Page

The feature available in **Product Catalog** is Lookup Lists

Using the above feature, you can configure lookup-lists.

15.7 Configuring the System

To configure your system, click **Configure System** from the main **Admin** module page. A **Configure System** page is displayed, as shown in **Figure 15.51**.

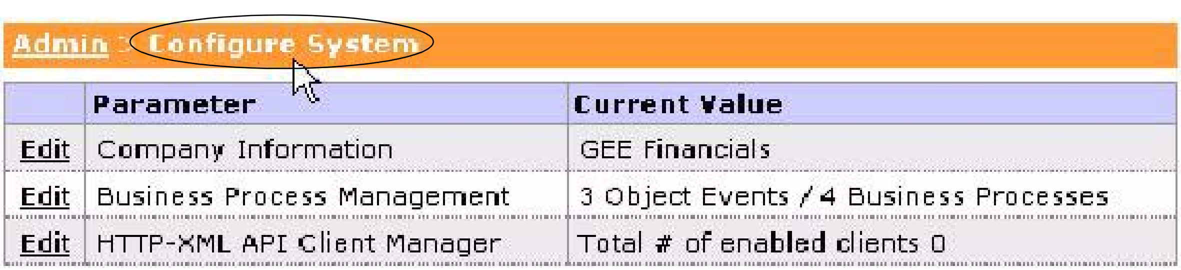


Figure 15.51 Configure System Page

There are a number of settings which are usually set at installation, and rarely need to be modified. These settings include:

- Company Information - allows the administrator to configure your company information

- Business Process Management - allows the administrator to configure workflows based on your company's business processes
- Session Timeout - displays the time, defining the period of inactivity that forces a user to be automatically logged out of the system
- Email Server - allows you to configure a mail server such that your Centric CRM server is able to access mails
- Email Address - allows you to set this address in the From field of the message

  You can assign a person to receive the mails sent to this address.
- Centric CRM URL - defines the Uniform Resource Locator(URL) that can be included in emails to allow you to access the site
  - This is used when a survey is sent to a contact.
  - The URL must be specific and must exist in your Domain Name Server (DNS).
  - If a domain name is not configured, you can specify the Internet Protocol (IP) address and include the full path to access the Centric CRM web application.
- Fax Server - which allows you to configure the fax server you want Centric CRM to use

  HylaFax is currently the only fax server supported. Leave the field blank if this facility will not be used.
- Default Time-zone for new users - which allows you to configure a lookup list defining all time-zones
- Default Currency for the system - which allows you to configure a lookup list with all the currency types your system recognizes
- Default Locale for the system - which allows you to configure a lookup list defining the locales supported by your system
- Default Country for the system - which allows you to configure a lookup list defining the countries your system supports

15.7.1 Modifying Company Information

To modify company information, click **Edit** beside **Company Information**. A modify page is displayed, as shown in **Figure 15.52**. This page enables you to change the following details:

- Organization name
- Web Site URL
- Phone numbers
- Address
- Email addresses

Click **Update** to save the modified information.

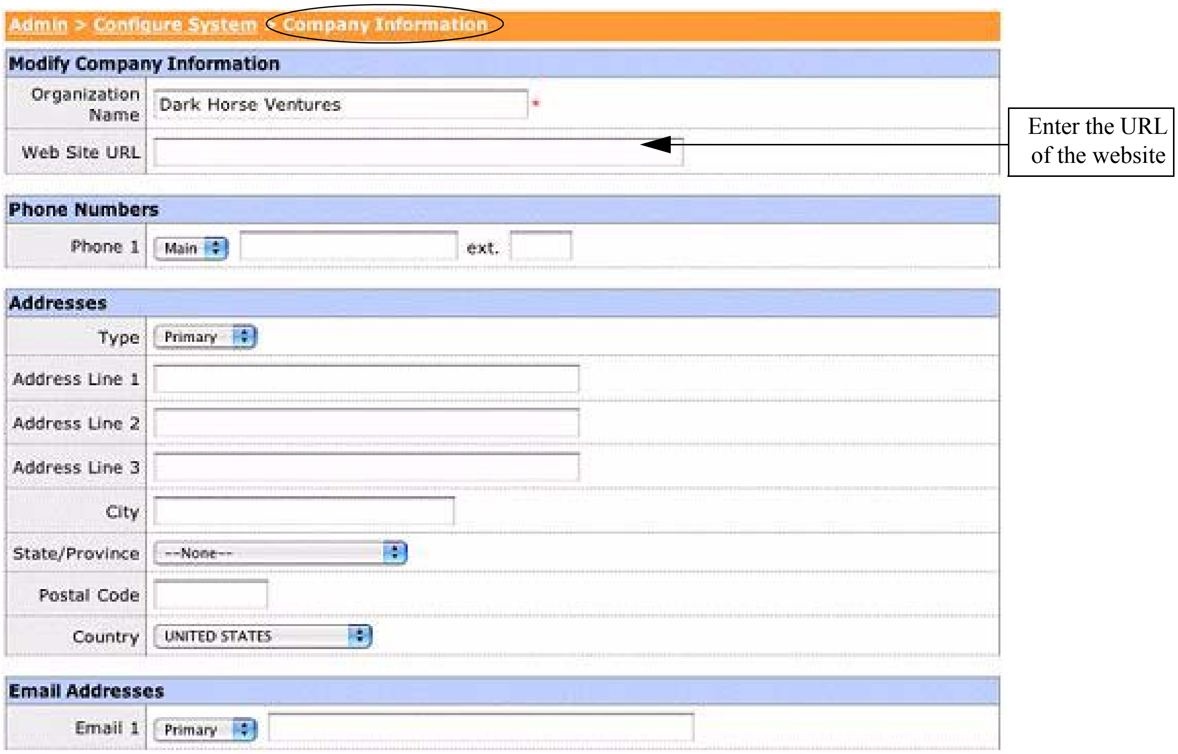


Figure 15.52 Modify Company Information

15.7.2 Modifying Business Process Management

To modify business process management information, click **Edit** beside the Business Process Management link. A workflow page is displayed, as shown in **Figure 15.53**. You can upload an XML Workflow file that updates the workflow schema. Whenever you perform certain actions within Centric CRM, which has a series of automated actions associated with it, the workflow engine performs these actions sequentially.

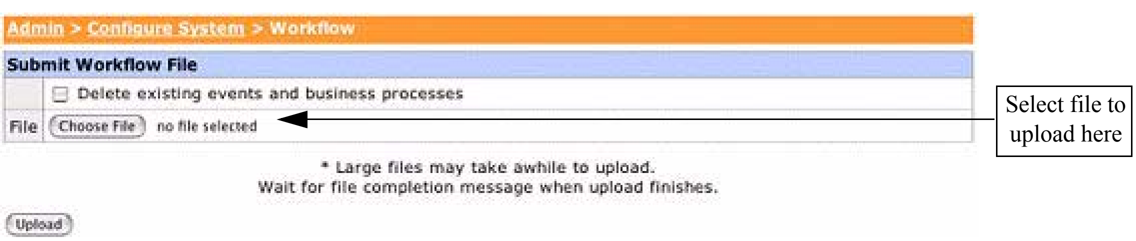


Figure 15.53 Business Process Management Using Workflows

15.8 Checking System Usage

To check the system usage, click **Check System Resources**. A **Usage** page is displayed, as shown in **Figure 15.54**. This page displays information about the system, including the version of Centric CRM you are using.

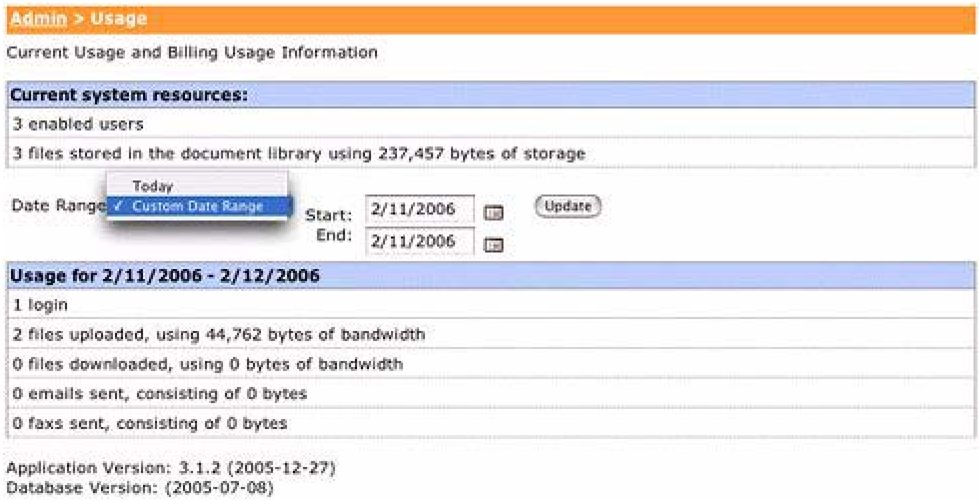


Figure 15.54 System Usage Display

Index