CUSTOMER RELATIONSHIP MANAGEMENT (CRM)

Introduction

CRM is a strategy for managing a company's interactions with clients and sales prospects. The CRM streamlines all phases of the sales process for tracking and recording every stage in the sales process, including email, telephone and direct mail contact.

This section of the manual will take the user through an overview of the Customer Relationship Management or CRM Module, the setup process that is required to implement the module, the file maintenance and training on the mechanics of the software.

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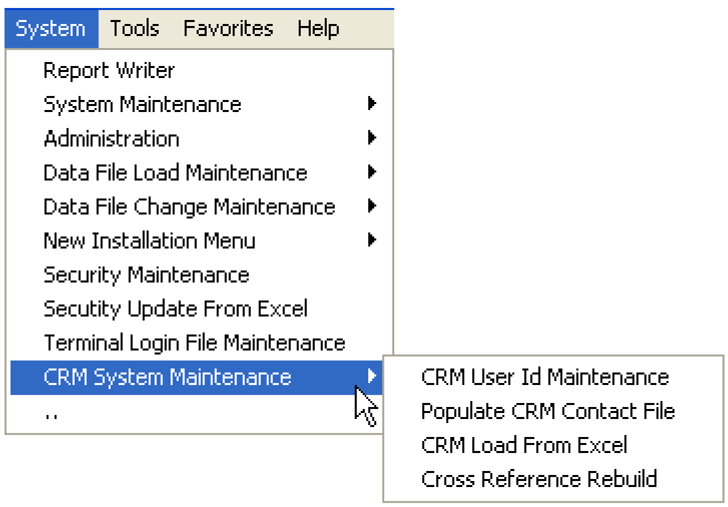
A. CRM SYSTEM ADMINISTRATION

In this section we will train the System Administrator on how to set up the CRM System.

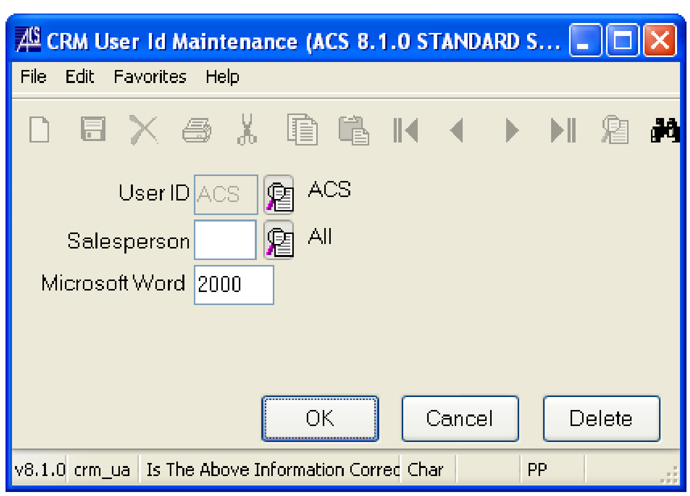
Items to be covered in this section:

1. CRM User ID Maintenance
2. Populate CRM Contact File
3. CRM Load From Excel
4. Cross Reference Rebuild



System ➔CRM System Maintenance ➔CRM User ID Maintenance

CRM User ID Maintenance
A user must be established in the CRM User ID Maintenance screen in order for the user to start using the CRM Module.



CRM User ID Maintenance Field Options:

User ID: Enter the user's three character alphanumeric User ID and hit the "Enter" key or use "F3" or the magnifying glass to see your options.

Salesperson: – Enter the Salesperson to be associated with this User ID, if applicable, or use "F3" or the magnifying glass to see your options. If you leave this field blank, the user will have access to all Salespersons information.

Microsoft Word: Enter the user's Microsoft Word version.

OK/Cancel/Delete

OK – Accepts data, clears screen, and return to the User ID field.

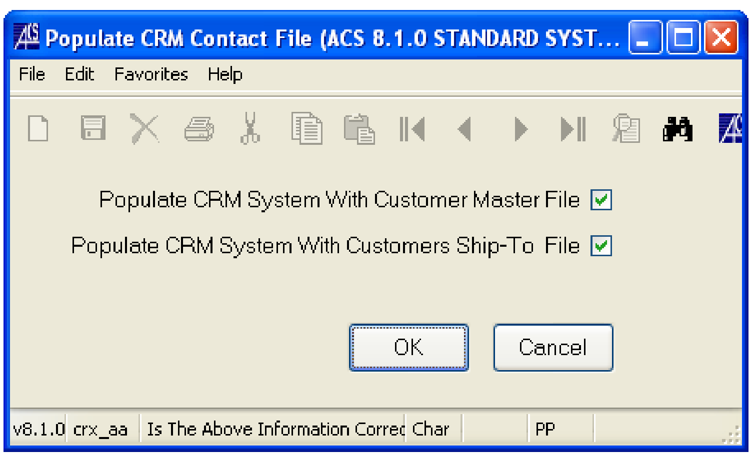
Cancel – Do not accept what has been entered, and asks the user if they wish to print a list of all records.

Delete – Delete the entry from the file.

System ➔CRM System Maintenance ➔Populate CRM Contact File

Populate CRM Contact File

The Populate CRM Contact File allows the System Administrator to easily update and populate the CRM Module from the current customer information, current ship-to file, or both.



Populate CRM Contact File Field Options:

Populate CRM System With Customer Master File: This selection, will update the current listing of all customers primary information setup in Customer Maintenance.

Populate CRM System With Customer Ship-To File: This selection, will update the current listing of all customers Ship-To information setup in Customer Maintenance, Ship-To Address Information.

OK/Cancel

OK – Updates based on selection.

Cancel – Do not accept what has been entered, and returns user to menu.

NOTE: If ran multiple times the program will not duplicate Customers or Ship-To's already in the CRM system.

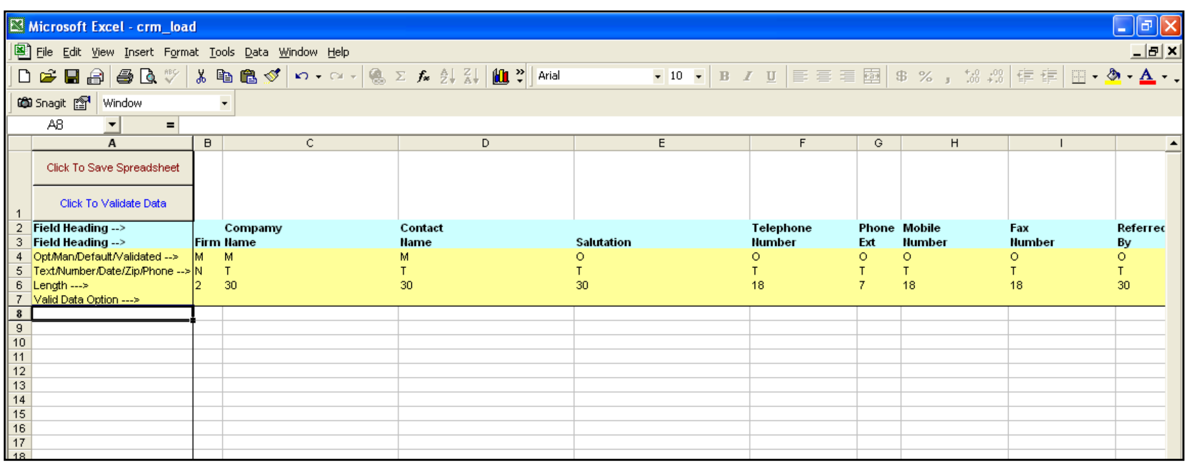
System ➔CRM System Maintenance ➔CRM Load From Excel

Prerequisite

1. The CRM Load From Excel requires that the user have Microsoft Excel installed on their workstation.
2. The security level Setting found at Excel Tools → Macro → Security should be set to Medium or Low.

CRM Load From Excel

The CRM Load From Excel is used to upload new data in the CRM system using Microsoft Excel workbooks. The workbooks have preset columns the user enters data into. The workbook is then used to update new company and contact information into the CRM System.



Opt/Man/Default/Validated:

O: Data in column is optional
M: Data in column is mandatory
D: Data in column has a preset default value if no data entered
V: Data in column is validated to codes created in the ACS Master System
P: Data in column is protected and no changes can be made

Text/Number/Date/Zip/Phone:
T: Data in column can be alphanumeric
N: Data in column must be numeric
D: Data in column must be in a date format (Hover above Field Heading for valid formats)
Z: Data in column must be in zip code format (Hover above Field Heading for valid formats)
P: Data in column must be in phone format (Hover above Field Heading for valid formats)

Length: Maximum character field length for the column, including spaces, dashes, slashes, etc. Numeric values will be rounded up or down according to the decimal place length noted for that column, if exceeded.

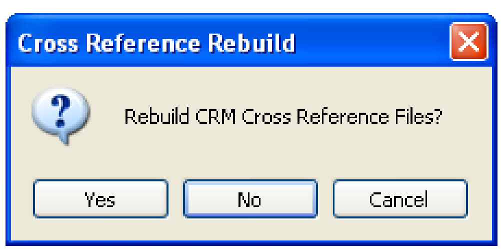
Valid Data Option: This tells the user what valid responses are allowed in the cell.

Click To Save Spreadsheet: Click this button to save data on spreadsheet and to exit the spreadsheet.

Click To Validate Data: Click this button to validate data on the spreadsheet before exiting. The following items are validated; maximum field lengths, mandatory fields not entered, incorrect data format, and incorrect valid data option.

System ➔CRM System Maintenance ➔Cross Reference Rebuild

Cross Reference Rebuild
This task rebuilds the links between the customers and their contact information. It also rebuilds the links between customers and their sales information. ACS may run this task when it appears the cross-reference files are incorrect.



Yes/No/Cancel

Yes: Selecting "Yes" will rebuild the customer Cross Reference File.

No: Returns user to menu.

Cancel: Returns user to menu.

Note: This is for ACS personnel only.

B. FILE MAINTENANCE TRAINING

In this section we will train the user on how to add and maintain the codes for the CRM Module.

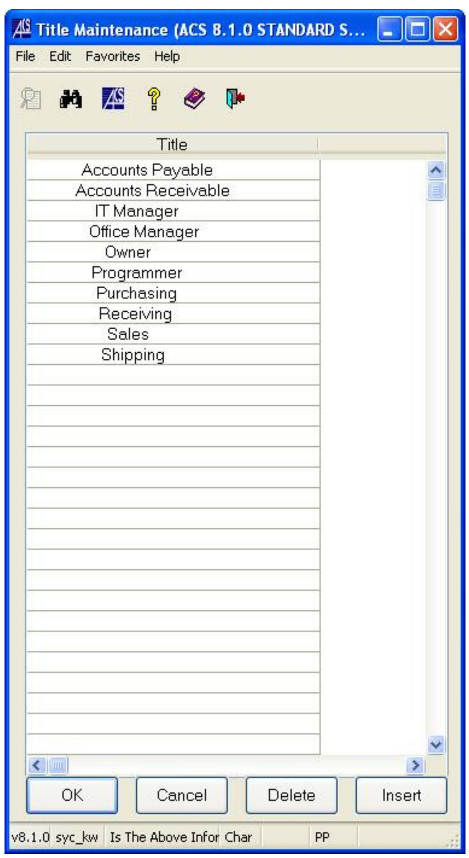
Items to be covered in this CRM Code Maintenance section:

1. Title Maintenance
2. Group Maintenance
3. ID/Status Maintenance
4. Priority Maintenance
5. Status Maintenance
6. Stage Maintenance
7. Type Maintenance

NOTE: You must make a Company and Contact selection before having access to these screens. All fields are validated.

Title Maintenance

Title Maintenance is used to separate and determine the contact's position in their company. When accessing Title Maintenance you will see a list of all existing customer Titles.



Title Maintenance Field Options:
To enter a new Title code, click the "Insert" button.

Title: Enter up to a 30-character Title. When the Title has been entered you will hit the "Enter" key.

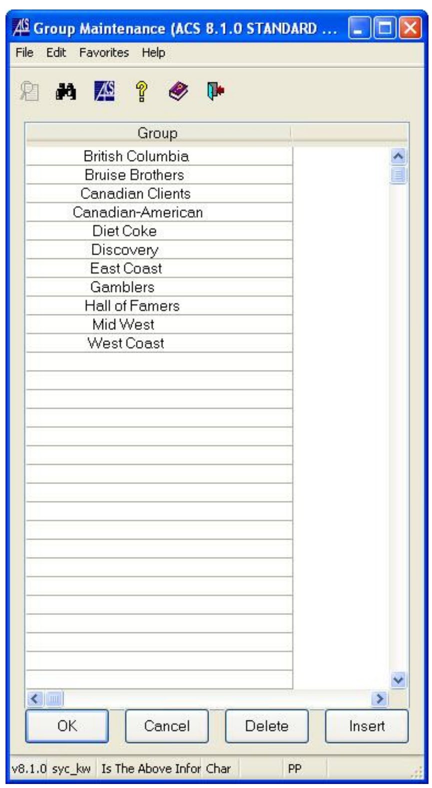
OK/Cancel/Delete

OK: Once all Title codes have been entered you will select your "OK" button and you will be taken to the maintenance screen menu.

Cancel: Select "Cancel" to exit.

Delete: To delete, select a Title code and select "Delete".

Group Maintenance
Group Maintenance is used for identifying and linking contacts who have a common business characteristic such as their location, region or organization they are associated with. The Group code is used to select contacts for reporting purposes. When accessing the Group Maintenance you will see a list of all existing Groups. A contact can be assigned 10 different groups.



Group Maintenance Field Options:
To enter a new Group, click the "Insert" button.

Group: Enter up to a 30-character Group description. When the Group has been entered you will hit the "Enter" key.

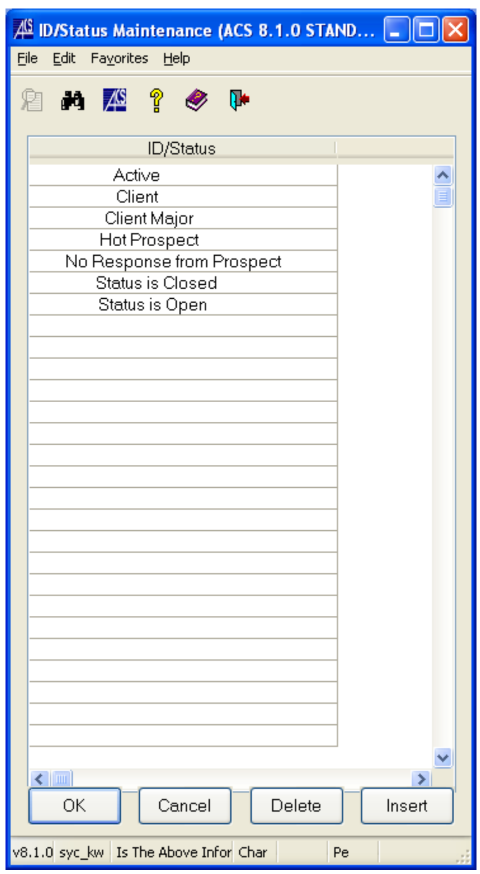
OK/Cancel/Delete

OK: Once all Groups have been entered you will select your "OK" button and you will be taken to the maintenance screen menu.

Cancel: Select "Cancel" to exit. The system will ask if you would like to save your changes.

Delete: To delete, select a Group and select "Delete".

ID/Status Maintenance
I/D Status defines the contact or prospect interest level at a specific moment in time in the sales process. When accessing the ID/Status Maintenance you will see a list of all existing ID/Status'.



ID/Status Maintenance Field Options:

To enter a new ID/Status, click the "Insert" button.
ID/Status Field: Enter up to a 30-character ID/Status description and select the "Enter" key.

OK/Cancel/Delete

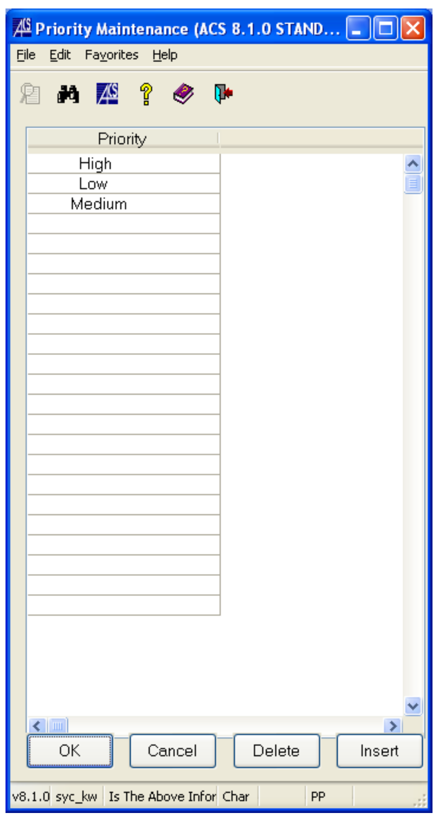
OK: Once all ID/Status descriptions have been entered you will select your "OK" button and you will be taken to the maintenance screen menu.

Cancel: Select "Cancel" to exit. The system will ask if you would like to save your changes.

Delete: To delete, select an ID/Status and select "Delete".

Priority Maintenance

Priority Maintenance is used to flag a activities in order of importance. When accessing the Priority Maintenance you will see a list of all existing codes.



Priority Maintenance Field Option:
To enter a new Priority description, click the "Insert" button.

Priority Field: Enter up to a 20-character Priority description and select the "Enter" key.

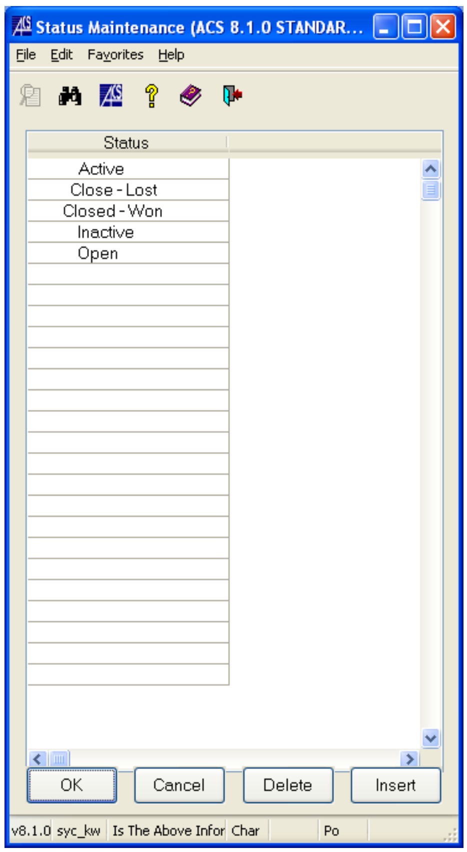
OK/Cancel/Delete

OK: Once all Priority descriptions have been entered you will select your "OK" button and you will be taken to the maintenance screen menu.

Cancel: Select "Cancel" to exit. The system will ask if you would like to save your changes.

Delete: To delete, select the Priority code and select "Delete".

Status Maintenance
Status Maintenance is used to describe the Opportunity phase. (i.e. active, closed, inactive) of a contact or prospect. An Opportunity is what the salesperson goal is for this specific contact or prospect. When accessing the Status Maintenance you will see a list of all existing codes.



Status Maintenance Field Option:
To enter a new Status code, click the "Insert" button.

Status Field: Enter up to a 20-character Status description and select the "Enter" key.

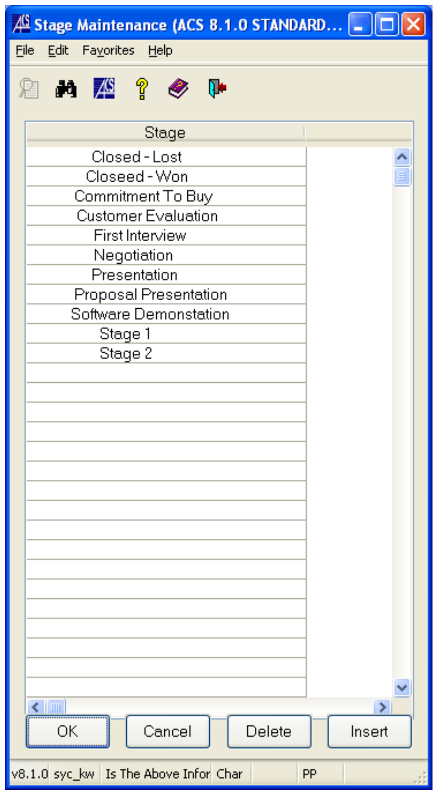
OK/Cancel/Delete

OK: Once all Status descriptions have been entered you will select your "OK" button and you will be taken to the maintenance screen menu.

Cancel: Select "Cancel" to exit. The system will ask if you would like to save your changes.

Delete: To delete, select the Status code and select "Delete".

Stage Maintenance
Stage Maintenance is used to describe the various steps involved in the sales process (i.e. presentation, follow up, closed). When accessing the Stage Maintenance you will see a list of all existing codes.



Stage Maintenance Field Option:
To enter a new Status description, click the "Insert" button.

Stage Field: Enter up to a 30-character Stage description and select the "Enter" key.

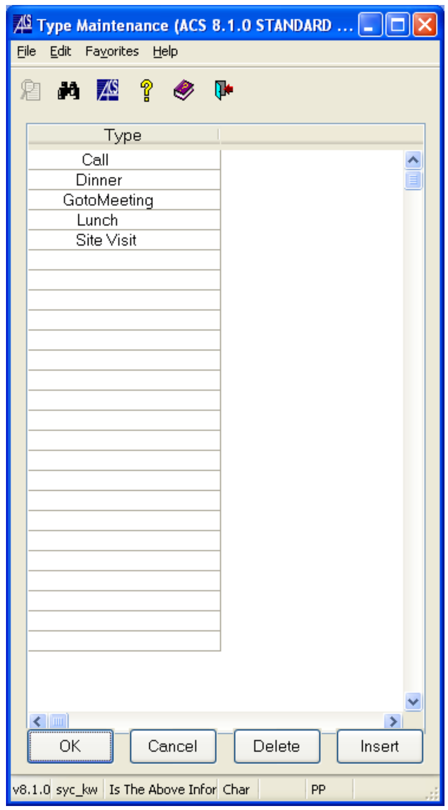
OK/Cancel/Delete
OK: Once all Stage descriptions have been entered you will select your "OK" button and you will be taken to the maintenance screen menu.

Cancel: Select "Cancel" to exit. The system will ask if you would like to save your changes.

Delete: To delete, select the Stage code and select "Delete".

Type Maintenance

Type Maintenance refers to the activity type when scheduling activities for the contact. When accessing the Type Maintenance you will see a list of all existing codes.



Type Maintenance Field Option:
To enter a new Type description, click the “Insert” button.

Stage Field: Enter up to a 20-character Type description and select the “Enter” key.

OK/Cancel/Delete

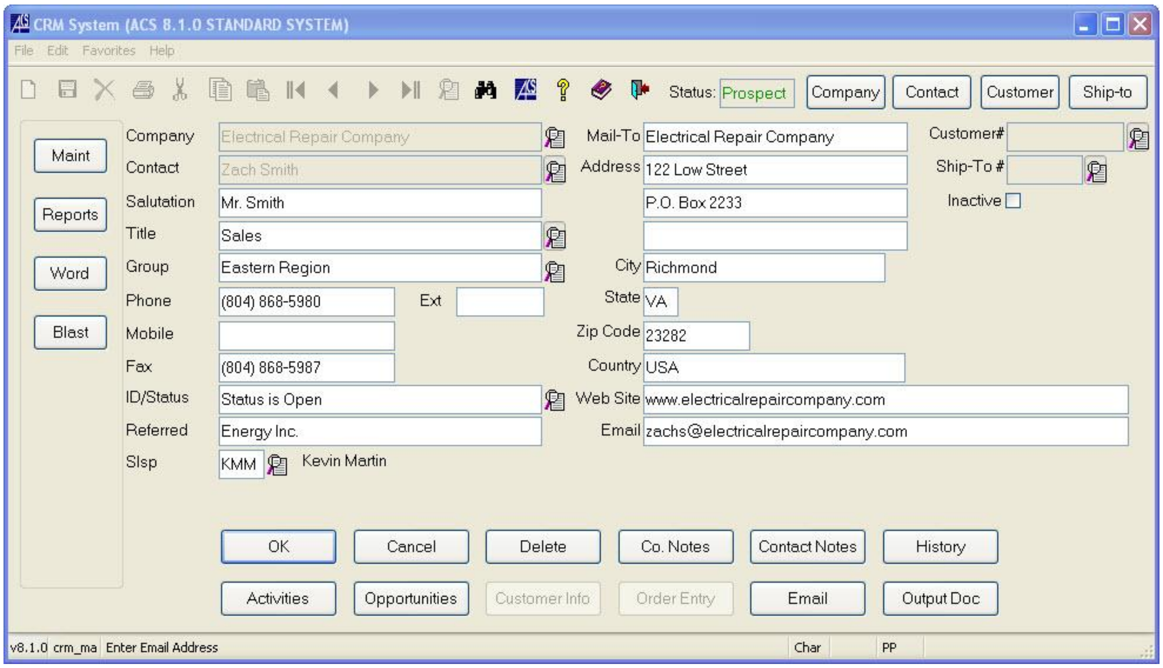
OK: Once all Type descriptions have been entered you will select your “OK” button and you will be taken to the maintenance screen menu.

Cancel: Select “Cancel” to exit. The system will ask if you would like to save your changes.

Delete: To delete, select the Type code and select “Delete”.

C. PROCESSING

This focus of the training will focus on basic, day-to-day, CRM functions. The CRM System's main screen fields consist of the following fields:



CRM System Entry
When entering a new prospect the following fields will be reviewed.

Company: Enter a company, select the magnifying glass or enter "F3" to select from a list of all valid companies, "F1" to pull information from the Customer Master, or enter a new prospect company.

Contact: Enter a valid contact name, select the magnifying glass or enter "F3" to select from a list of all valid customers, "F1" to override information from the Ship-To File, or enter a new contact for the company. System allows multiple contacts for the same company.

Salutation: Enter the contact's salutation. It can be their first name only or you can add Mr./Mrs./Ms. and the contact's last name. This field is important because it determines what name will print on all mail merge materials.

Title: Enter a valid contact title. Select the magnifying glass or use "F3" to select from a list of all valid titles.

Group: If using Groups, enter the group assigned to this contact or use F3 to look up the available groups. Each contact can have up to ten Groups assigned to them.
Contact Phone / Ext, Mobile, Fax – Enter the contact information.

ID/Status: Determines what Status or phase the contact is in. Use F3 to look up the available ID/Status'.
Referred: Reference field only. Determines who the contact was referred by.

Slsp: The default Salesperson setup for current customers will automatically display here. If entering a new prospect, enter the code for the Salesperson assigned to this contact.

Mail-To: Defines the mailing address for the contact, which could include an alternate company name.

Address: Three lines are available (24 characters each) for customer mailing address.

City: Can be up to 22 characters to identify the name of the city associated with the customer billing address.

State: 2-character field to identify the name of the state or province associated with the customer billing address.

Zip Code: The customer's zip code can consist of either a 5 or 9 digit zip code, depending on how the parameter is set in Accounts Receivable Parameter Maintenance.

Country: This optional field is up to 24 characters representing the name of the country associated with the customer.

Web Site: Presently, this is a reference field that gives you a place to store the contact's website.

Email: Enter the email address for this contact.

Customer#: Each existing Customer will bring their 6 character Customer Number that is assigned to them in the Customer Master File. If this is a prospect customer, the Customer # will be grayed out.

Ship-To: It may become necessary to establish different Ship To addresses for some of your contacts.

Inactive: You can mark this contact as Inactive if you want to be sure that they cannot be contacted or included on reports.

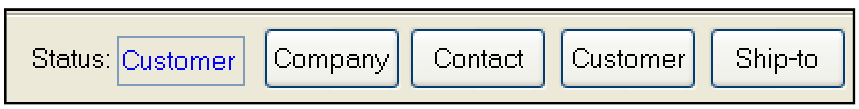
YR/Sales: The CRM Module will display the company's Sales Analysis information for the current year and past three years, if the company is setup in the ACS System. These fields will not display for prospects.

OK / Cancel / Delete

OK: Once all fields have been entered you will select your "OK" button and you will be taken to the next company's information.
Cancel: Select "Cancel" to return to the Company field and select or enter a new company.

Delete: To delete a contact, select "Delete".

Additional Options



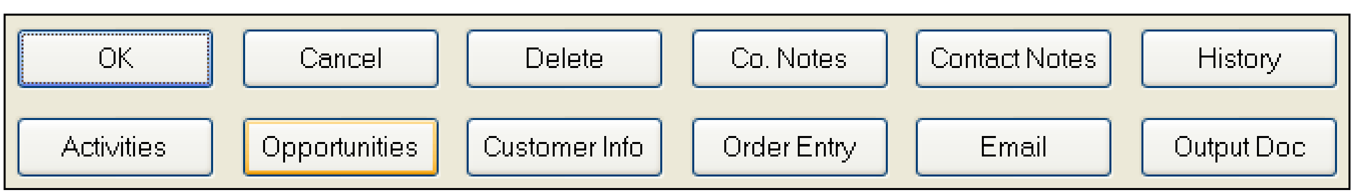
Status: Indicates if the contact is a customer in the ACS system, prospect or inactive in the CRM.

Company: Used to change the contact's company name only in the CRM System for all contacts associated with this company.

Contact: Used to change the contact name in the CRM.

Customer: Used to link a company and contact to a valid Customer Number.

Ship-to: Used to link a company and contact to a valid Ship-To.



Co. Notes

You can enter detailed information related to the company using Note Pad. For example the number of employees, sales information, etc.

Contact Notes
Contact Notes describe in a date and time stamp entry the results of any communication, phone calls, and face-to-face meetings with a contact. Contact Notes uses Word Pad, which will display the first 60 characters. Mileage can also be entered on this screen.

History
History compiles in a date and time stamp format all activities and communications made by mail or email with this contact.

Activities
Activities are scheduled events that will occur at a date and time specified with a contact. For example scheduled phone conferences, demos, or mailings. To enter in a new activity, select "Add". Activities will automatically display on the Calendar.

- Enter a valid Type by select the magnifying glass or "F3" to select from a list of all valid Types.
- Enter the scheduled date or select "F3" to lookup the date on the calendar.
- Enter the time of the activity using military time. Defaults to current time.
- Enter the duration of the activity.
- Enter the Priority of the activity or "F3" to select from a list of valid Priority codes.
- Enter a valid Status by selecting the magnifying glass or "F3" to select from a list of all Status codes or select History to move an item to History.

Opportunities
Opportunities define a sales objective with a contact. For example the salesperson may be able to sell a service contract or trial order to this contact.

- Enter a valid Status by selecting the magnifying glass or "F3" to select from a list of all Status codes.
- Enter a name or description of the Opportunity.
- Enter in the estimate close/expiration date.
- Enter a valid Stage by selecting the magnifying glass or "F3" to select from a list of all Stages setup for the sales process.
- Enter the probability of closing this sale.
- Enter the estimated total amount of the sale.

Customer Info
This links a customer to their ACS Customer Sales and Repair information along with displaying their customer maintenance information, allows access to Jobs, Invoice Inquiry, Open Aging, Check Detail Display, Open Orders, and Aging and Sales information. This option is only available if the contact is linked to an ACS Master customer.

Order Entry
This will launch ACS Order Entry and will populate the customer number. This is only available if the contact is linked to an ACS customer number; this is not available for contacts whose Status is set to Prospect.

Email
Takes you directly to Microsoft Outlook to send the contact an email. This activity will be automatically added to the contacts history.

Output Doc
Templates or letters that can be sent by Salesperson; the document can be printed, emailed, or faxed.

D. ADVANCED PROCESS TRAINING

This section will review the following:

1. CRM Contact Reports
   - Contact Report
   - Contact Phone List
   - Salesperson Mileage Report
   - Opportunities By Status
   - Group Membership Report
   - Group Comprehensive Report
   - Pipeline Report
   - Notes/History Report
2. Word
3. Blast
   - Create Blast Output Contact List

   - Blast Document Output
   - Swift Page
   - Email Log
4. Calendar

CRM CONTACT REPORTS

Contact Report
A report of contact activity, both those scheduled and those recorded in history.

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Contact Phone List
A list of contacts by company, contact name and phone number.

Salesperson Mileage Report
Mileage Report is by Salesperson by date. It lists the date, company name, contact person and mileage associated with an activity.

Opportunities By Status
This creates a list of opportunities by salesperson showing the current stage of the sales process.

Group Membership Report
Group Membership Report list members by group; listing the company, contact and phone number.

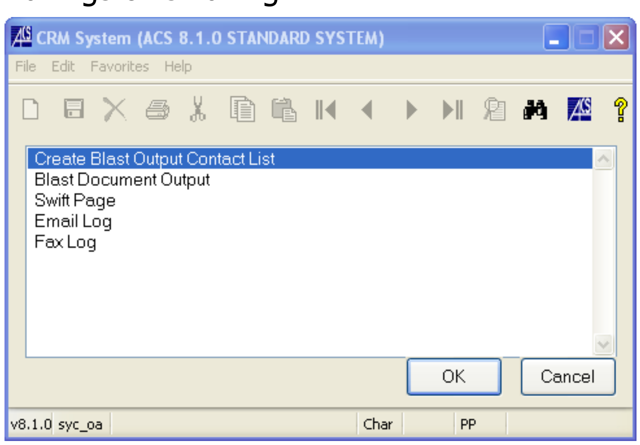
Group Comprehensive Report
The Group Comprehensive Report is by Group and it lists the company, contact and scheduled activities and history.

Pipeline Report
The Pipeline Report lists opportunities by Stage in the sales process.

Notes/History Report
Notes / History Report can be run by contact, by group, by salesperson and lists all activities for a contact within a specified date range.

WORD
Gives you access to edit the Word documents and templates setup.

BLAST
The Blast generates mass mailings or emailing.



Create Blast Output Contact List

This option allows you to select which contacts you would like to send an email or fax blast to. The contact list can be filtered by State and Group.

Blast Document Output

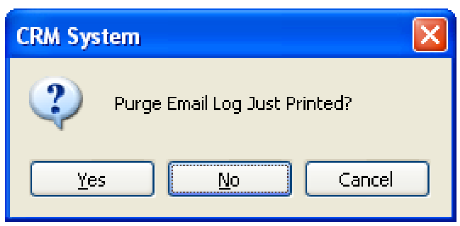
This option allows you to select which document or template you would like to use when sending the blast email or fax.

Swift Page

This third party, free software, enables you to send highly professional emails to leads, contacts and groups within the ACS CRM Module. Swift Page allows you to create new templates or select from a template gallery.

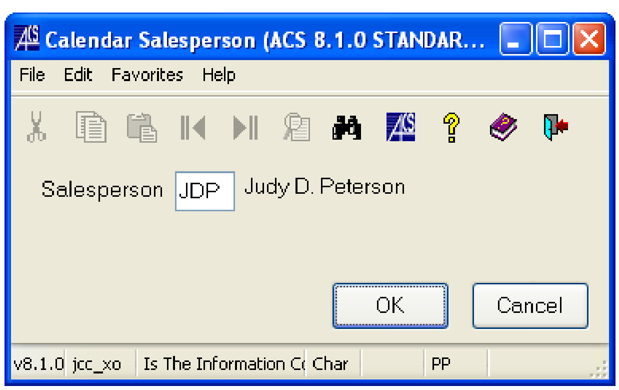
Email Log

This report will display all emails sent out including the date, time, company/contact information, email from/to, and subject line. After printing the Email Log the system will ask you if you would like to "Purge the Email Log Just Printed?"



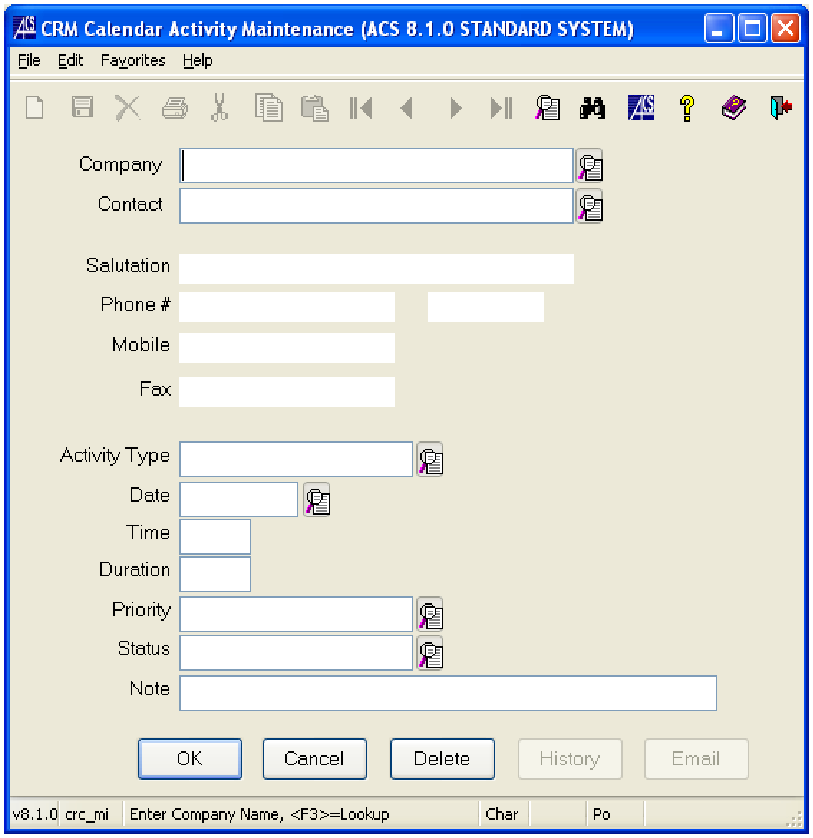
Calendar

Creating and scheduling appointments with customers is a central activity of most customer-oriented businesses. A scheduled activity can be viewed by Salesperson.



The calendar allows the user to view all activities for a week's time. Activities in red show a conflict during the timeslot.

Users can add new activities by selecting the date and timeslot on the calendar and then double clicking on the field. The system will display the following screen:



- The Company and Contact information is required when scheduling an activity. The next fields, Salutation, Phone #, Mobile, and Fax will automatically populate based on the contact's information in the CRM.
- Enter a valid Activity Type by select the magnifying glass or "F3" to select from a list of all valid Types.
- Enter the scheduled date or select "F3" to lookup the date on the calendar.
- Enter the time of the activity using military time.
- Enter the duration of the activity.
- Enter the Priority of the activity or "F3" to select from a list of valid Priority codes.
- Enter a valid Status by selecting the magnifying glass or "F3" to select from a list of all Status codes or select History to move an item to History.
- Enter any notes for this scheduled activity.

The Calendar allows you to move activities to "History" and Contact Notes.

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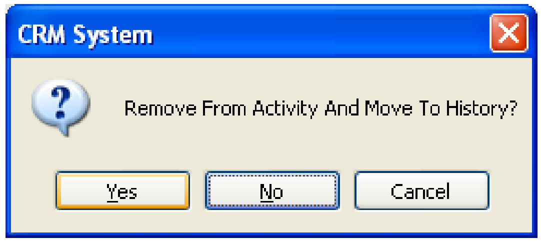
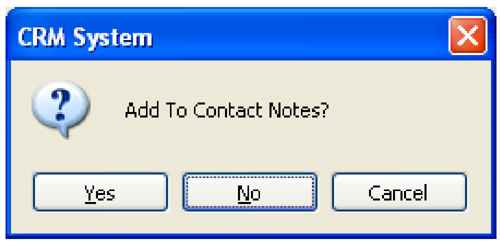


After selecting to move a Calendar Activity to History the system will then ask the user if they would like to add Contact Notes.



OK / Cancel / Delete

OK: Once all fields have been entered you will select your "OK" button and the information will saved and you will be taken to the Calendar.

Cancel: Select "Cancel" to return to Calendar

Delete: To delete an Activity, select "Delete".