

# vtiger CRM

USER AND ADMINISTRATION MANUAL V5.x  
Third Edition



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crm-now

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# **vtiger CRM v5.x: User and Administration Manual**

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## Preface

The vtiger CRM manual is a comprehensive step-by-step guide to using this powerful CRM system, an Open Source Customer Relationship Management project. The vtiger CRM system is one of the most exciting and best professional-quality Open Source products for companies in the B2B business which have longer sales cycles and a stable product or service portfolio.

vtiger provides your organization with a powerful, comprehensive and integrated solution for managing customer relationships. Because it is Open Source and it provides professional features, the vtiger CRM system has been adopted by a large and growing community. vtiger CRM is easy-to-understand and widely used.



### Important

This manual is based on the official Open Source v5.0.4 release.

## 1. Why Read This Manual?

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This manual is designed to be a clear and supportive reference to the vtiger CRM system. However, this manual is not an official documentation.

I hope to answer most of the questions you might have about all the features and modules of the vtiger CRM. The following subjects are covered in particular:

- The general approach to vtiger CRM. With all its modules and their relationship to each other, vtiger CRM can be a bit overwhelming at first. I quickly get you up to speed on how the pieces fit together.
- How to start using the CRM. What should you do first?
- Sales force automation. After you have entered data into the system how does the system supports you automatically.
- Account Management. How to work with accounts and contacts. What can you do with them?
- Understanding all of the relationships. Most data entered into the CRM system are somehow related to each other. These relationships are extensively documented, including the intended purpose. If suitable, examples of proper usage are given.
- Customizing the CRM system. Each company is different. I explain how you can tailor the vtiger CRM to fit your company's needs.
- Security Settings. I explain the principles and the implementation of role based security.
- Tools. The CRM system comes with a set of tools that supports the organization of sales teams as well as the reporting to the management. I show you how these tools can be used.
- Additional resources. Finally, I direct you to other places you can go for all the latest info, and offer a complete set of online references.

## 2. This Manual's Audience

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This manual has been written for vtiger CRM users and administrators. I expect most readers to have some familiarity with CRM. Although I provide a description of all features as they are implemented at the release date, this book may not suffice as your only reference about vtiger CRM. This depends on your needs and ex-

perience but also on the progress vtiger CRM makes. For a list of some other good resources, consult [Appendix: Ressources](#).

### 3. Organization of This Manual

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This manual is divided into four parts and appendixes:

#### **Chapter 1: Introduction**

Describes how the manual should be read.

#### **Chapter 2: Data Entries**

Explains how customer contacts are defined and how to use the CRM system to collect customer information. Shows what type of sales activities the CRM system supports and how these activities are being entered. Provides all the information required to understand the sales process supported by the CRM system. Lists all the possibilities of entering products and price lists to the system.

#### **Chapter 3: Working with the CRM System**

Describes how it all fits together and how the CRM system can be used to coordinate the work of sales, marketing and service staff and to increase the productivity of each individual user. Explains all the automated functions available, how sales processes can be defined and which after sales services are offered.

#### **Chapter 4: Administrative Tasks**

Describes in detail how to manage users and privileges and how to customize templates and the CRM system configuration.

#### **Appendix: Administration Examples**

Provides some sample configurations and FAQ's for security setups. Explains in detail how to assign access privileges based on a hierarchical organization structure.

### 4. Getting This Manual

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You can get the latest version of this book in electronic form from the manual's web site:  
<http://www.vtiger-deutschland.de/vtigerdocu.html>.

### 5. Request for Comments

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Please help me to improve future editions of this book by reporting any errors, inaccuracies, bugs, misleading or confusing statements, and plain old typos that you find. Email your findings and comments to the author at [vtigermanual@crm-now.de](mailto:vtigermanual@crm-now.de).



## 6. Acknowledgements

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This manual has been in the works since version 5.0.0. Completion of this manual would not have been possible without the help and encouragement of a lot of people. The outstanding vtiger team, its user community, and a number of people contributed technical feedback as this book was being written. I also thank the people who contributed to this manual with informal reviews, suggestions, and fixes during the writing process.

While the following is by no means a complete list, this book would be incomplete and incorrect without the help of Emilio Paolini, Walter Schönenbröcher, and Dirk Gorny.

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# Chapter 1. Introduction

This chapter explains how to read this manual and provides an overview of all types of considerations a user should go through before starting to work with the CRM system.

## 1.1. About this Manual

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With the help of this manual you will quickly become familiar with the CRM system. The aim of this manual is to bring together the knowledge about the vtiger CRM functions and features with the sales processes as they are defined by companies using the CRM system. I will explain how to configure the system to fit to your needs and how to use it effectively.

Please keep in mind that this CRM system is a tool for your sales, marketing, and/or service organization. It is especially suited for companies:

- which are in the B2B or B2C business
- which have longer sales cycles
- which do not change the product or service offerings frequently
- which are operating with sales, services or marketing teams located at multiple locations

I believe that most vtiger CRM system users and administrators will benefit by reading this manual from cover to cover. Yet, I also know that if you are involved in CRM today, your hectic schedule may force you to skim through this manual to get the highlights, until can find a quiet moment to read more thoroughly. So I have tried to make it easy for you. The document has a clear structure, starting with the basics and becoming more detailed as you move ahead. In addition, references to other useful resources are provided.

The names for organisations or contacts used in the examples of this manual are imaginary. Any resemblances to existing companies or persons is coincidental.

The use of the vtiger CRM software and its related user documentations is subject to the terms and conditions of the applicable licenses.

### 1.1.1. Manual Instructions

You can identify the manual version by its ID number located at the second page of this manual. The first 3 digits of this number identify the document type. The next three digits are the version number. The last two digits identify the edition within a version.

This manual uses the following terms and syntax when explaining procedures and steps:

#### **Browser based user entries**

All browser based instructions to be entered by users are written bold or in italics, and put in brackets.

Sample: Please click the [**Save**] button.

#### **Menu based instructions**

Instructions to be entered by the menu are also written bold, or in italics, and put in brackets. Multiple instructions are separated by the ">" sign.

Sample: Please click [**Contacts**] > [**New**].

Furthermore, several icons are used to mark special comments:



**Note**

Special comments you should remember when reading the manual.



**Important**

These are rules you must follow when working with the CRM system.



**Warning**

Informs about circumstances that can happen if you do something wrong.



**Tip**

Provides hints for doing something faster or better.

---

## 1.2. First Steps

### 1.2.1. Becoming a User

Before you can start working with the CRM system you must identify yourself to the CRM system as an authorized user. This is done by a login procedure which requires a Username and a Password. Both are provided to you by your CRM system administrator.

### 1.2.2. PC Setup and other Requirements

For the simple use of the CRM system you do not need to install any software on your computer system. You operate the CRM system solely by your favorite browser only.



**Note**

If you want to have your office environment linked to the CRM system, you may install some extensions on your computer later. For this purpose please refer to the appropriate other manuals listed in [Appendix: Ressources](#).

Please note the following minimum requirements and follow the browser setup instructions.

**Hardware requirements:**

PC or Thin Client with Browser and minimum screen resolution of 1024 \* 768 pixel.

**Browser:**

Firefox 1.5 or better (our favorite), MS IE 6.0 or better, Opera 7.01 or better

**Tip**

**Caution to Internet Explorer users:** Depending on your Internet Explorer version, there is apparently a minor bug within page caching that may affect AJAX client performance in some cases. If your CRM system slows down, I recommend to clear your browser cache.

Your browser configuration must meet the following requirements:

**Cookies**

You must allow cookies.

**Java**

You must have JavaScripts enabled in the security settings of your browser.

### 1.2.3. Login

Your CRM system administrator will provide you with a URL to be used as the access address to the CRM system at your browser. You will also need the Username and the Password of your CRM account.

The screenshot shows the vtiger CRM 5 login interface. At the top left is the 'vtiger CRM 5' logo. At the top right is the slogan 'The honest Open Source CRM'. Below the header, on the left, is a list of features: Sales force Automation, Marketing Automation, Customer Support & Service, and Order Management, followed by 'and more...'. On the right, under the heading 'Sign in', there is a login form. The form includes a 'User Name' field with 'admin' entered, a 'Password' field with '\*\*\*\*\*' entered, a 'Color Theme' dropdown menu with 'blueagoon' selected, and a 'Language' dropdown menu with 'US English' selected. A blue 'Sign in' button is positioned at the bottom right of the form.

**Figure 1.1. Login screen**

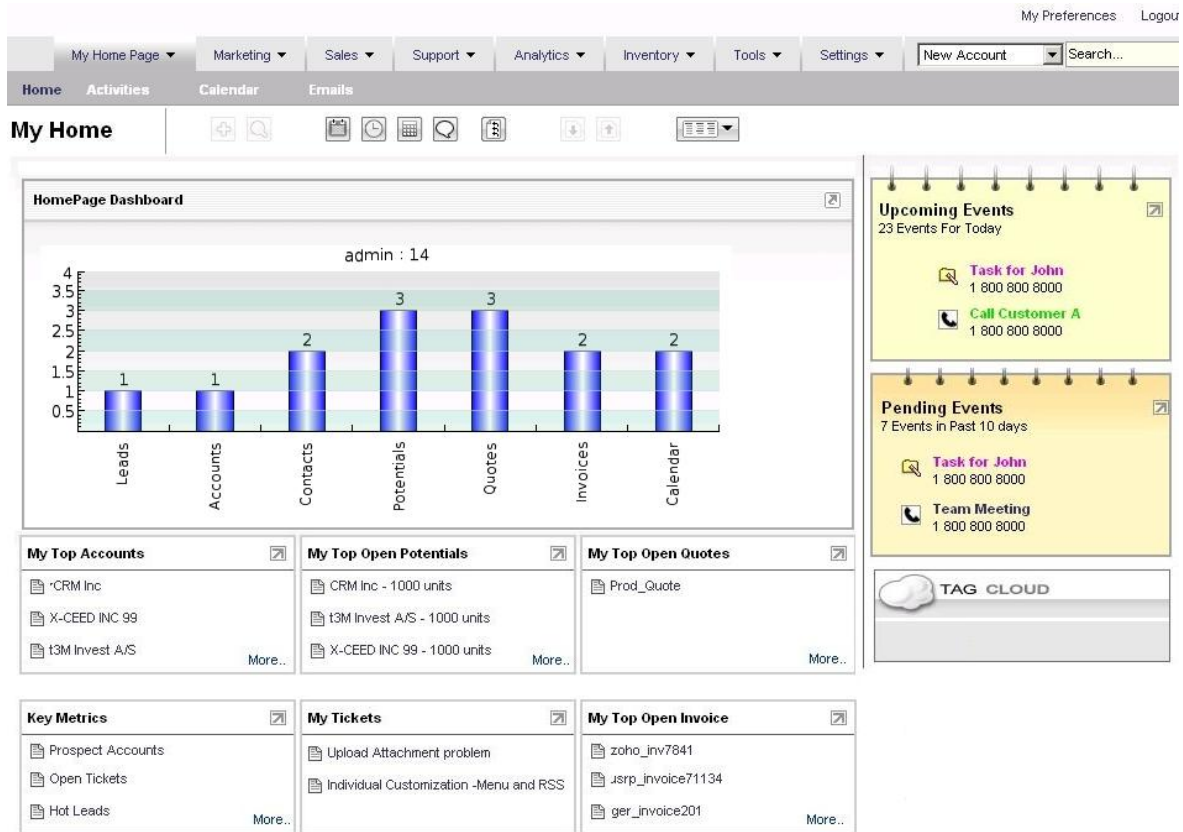
Upon starting the CRM software, the Login screen will appear as shown in [figure: Login Screen](#). The user must type an Username and Password into the available edit fields in order to continue on the program. A user may also choose a different Theme or Language. Username, Password, Themes and Languages are provided by the system administrator. After entering the Username and Password, press <Enter>, or the **Sign in** Button.

**Caution**

Most browsers are able to store your Username and Password to simplify usage. However, this may be a security risk if you cannot make sure that nobody else has access to your computer. Unauthorized persons may get access to your confidential data. This is especially true if you are using a notebook that can get lost.

## 1.2.4. CRM Home Page

After login, you will be shown a Home page screen as shown in [figure: CRM Home page](#).



**Figure 1.2. CRM Home Page**

Based on the theme you selected, the system settings done by your administrator, and the data stored at the CRM system, your actual screen may look different. The following chapters will explain how you can customize the Home page and how you can use the CRM functions.

### Home Page Content

The main area of the Home page, as illustrated in the center of [figure: CRM Home page](#), displays a block summary of the most important CRM information. You can change the order of these blocks by dragging and dropping. You can also change the content of your home page as explained in [section: My Preferences](#).

**Table 1.1. List of block information at Home**

Homepage Dashboard:	This dashboard displays the data stored at the CRM system as a graphic. This graphic summarizes all information that are related to the user logged in.
My Top Accounts:	Here you can see a list of your top accounts. The content of this list is generated by adding all amounts listed at potentials related to individual accounts.
My Top Open Potentials:	This is a list of your potentials. It does not include the potentials assigned to other users.
My Group Allocations:	This a list of CRM entries which have been assigned to a group where you are a member.
My Trouble Tickets:	This is a list of tickets assigned to you or to a group where you are a member.

Key Metrics:	The key metrics is a powerful tool. Its function depends on your list view settings. For the data displayed in each CRM module, you may create list views based on criteria that meet your special needs. These criteria can be met, for instance, by using the filter functions. The key metrics will add up the number of CRM entries that meet these criteria. For instance, you build a list view of all quotes which has been drafted. Then the key metrics will show you the total number of these quotes.
My Top Open Quotes:	Here are only your open quotes listed. All entries are sorted by their amount.
My Top Open Sales Orders:	Here are only your open sales orders listed. All entries are sorted by their amount.
My Top Open Purchase Orders:	Here are only your open purchase orders listed. All entries are sorted by their amount.
My Top Open Invoice:	Here are only your open invoices listed. All entries are sorted by their amount.
My New Leads:	Here are your new Leads displayed. You may select at the <b>My Settings</b> menu what you consider as new.
Upcoming & Pending Activities:	This lists the upcoming and pending activities from your calendar. Pending activities are overdue and not closed.
My Recent FAQs:	This is a list of your entries at the knowledge base.



### Important

Please note that all data stored at the CRM system have an owner. The owner is marked by an "[assigned to:]" entry. If you make a new entry, the data will automatically be assigned to you unless you change this intentionally. At the Home page only data assigned to you will be shown.

**In the right-hand area** of the CRM's Home page, you see a list of your upcoming and pending activities as well as the tag cloud. The activity features of the CRM system are described in [section: Calendar and Activities](#). The purpose and the functions of the tag cloud are explained in [section: Tag Cloud](#).

## Navigation

The smart design of the CRM system will allow you to get most information quickly. You can navigate within the CRM as if you were browsing websites.



### Caution

It is not recommended to use the back and forward buttons of the browser. These buttons can cause problems when browsing through pages with dynamically generated content.

It is recommended to use the icons and links provided by the CRM system. Advanced users may switch to tabbed browsing (offered e.g. by the Firefox Browser or IE7) to speed up the handling process. You may reach each CRM page by a few clicks. All CRM pages are in hierarchical order. You may switch between pages at the same hierarchical level or you may access a page directly. Based on the content of each individual page you may use the following keyboard shortcuts:

- [Alt+E:] Edit
- [Alt+S:] Save
- [Alt+Q:] Search
- [Alt+C:] Empty
- [Alt+G: ]Select
- [Alt+D: ]Delete

- [Alt+U:] Copy

At the Top of the CRM system, as illustrated at [figure: Top Area](#) you have access to different area types and functions to navigate and to work with the CRM.

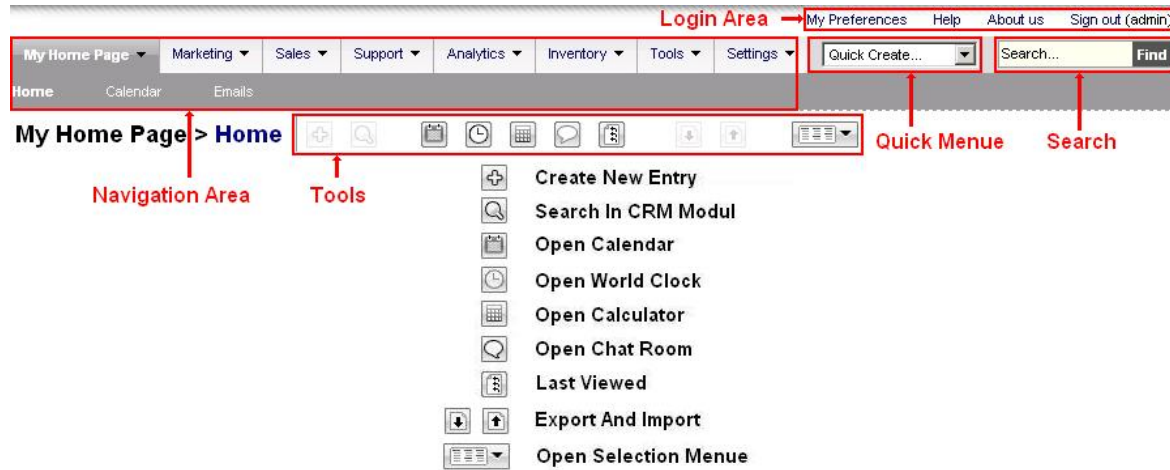


Figure 1.3. Screen Top Area

#### Login area:

In this area you may access your preference data, get help or release information, or leave the CRM system.

#### Navigation area:

Here you can swap between the functions and data lists offered by the CRM system.

#### Quick-Menu:

Here you can quickly reach data entry pages, however, with limited functionalities.

#### Search:

Here you can search you entire data base.


#### Tools:

By clicking these icons, you get a quick access to the calendar, the clock, the calculator and other functions. In addition, you may use the **Open Selection Menu** icon for a quick access to all CRM modules. These icons are available at all CRM menus if appropriate.

## My Preferences

When you click **My Preferences** a new window opens as displayed in [figure: My Preferences](#). This allows you to view and edit user information and to set your own preferences.





## My Preferences

Viewing details about the user "Administrator "

View Audit Trail
Edit

---

### 1. User Login & Role

User Name	admin	<input checked="" type="checkbox"/> Admin	on
Password	<input type="button" value="Change Password"/>	Email	install@crm-now.de
Status	Active	First Name	
Currency	U.S Dollar : \$	Last Name	Administrator
Default Lead View	Today	Role	CRM Administrator
Default Calendar View	This Week		

### 2. More Information

Title		Fax	
Department		Other Email	
Office Phone		Yahoo id	
Mobile		Reports To	
Home Phone		Other Phone	
Date Format	dd-mm-yyyy	Signature	
Notes	nur zur Demo	Internal Mail Composer	yes

### 3. User Address

Street Address		Country	
City		Postal Code	
State			

### 4. User Photograph

### 5. Home Page Components

### 6. Tag Cloud Display

### 7. My Groups

### 8. Login History

Figure 1.4. My Preferences

Most of these fields are self-explanatory. The highlighted fields in [figure: My Preferences](#) are fields that serve special purposes and are explained in the following table:

Table 1.2. List of special fields at My Preferences

User Login & Role - Admin:	If the check box is marked, the user has administrator privileges. This field cannot be edited by a user; it can only be changed by the administrator.
User Login & Role - Role:	This field displays the role assigned to the user. This field cannot be edited by a user; it can only be changed by the administrator.
User Login & Role - Status:	This field shows whether a user is active (only important for administrators). Inactive users are not allowed to access the CRM system. This field cannot be edited by a user; it can only be changed by the administrator.
User Login & Role - Default Lead	This field defines how long a Lead is considered as new and displayed

Display:	at the home page.
More Information - Signature:	This defines the signature which is automatically added to outgoing emails. You may use HTML tags to format your signature. Note that the space is limited. Your CRM provider may increase this space if necessary.
More Information - Internal Mail Composer:	This defines whether the internal CRM mail composer is used when clicking on an email address. If switched off the mail composer installed on your computer is used.
More Information - Reports To:	Here the supervisor of a particular user is defined. This does not influence the security settings at all.
User Photograph:	Here an image or photo of an user can be stored.
Home Page Components:	This defines which CRM information is displayed at the users home page.
Tag Cloud Display:	This defines whether the tag cloud is displayed.
My Groups:	If a user is a member of a group, a list of the membership is shown.
Login History:	That displays the login history for the CRM system.

Every user can define and change his own password. It is recommended to change the password frequently.



### Important

User name and passwords have to be a combination of small or capital letters and numbers. It is recommended that you use at least 8 digits. As more digits you have, the more secure CRM access is. The use of special characters such as %, / or umlaut (such as ä, ö, ü or ß), as they are used in other languages, is not allowed. A good password for example looks like Dhe4K39b. User names once created cannot be changed. However, you might create a new user and transfer all data to the new user.

Click on the **[Edit]** button to make changes. Alternatively you may move your mouse pointer over an entry. An edit function is then offered, which you can use to change one particular entry.

The **View Audit Trail** button is only functional, if the CRM system administrator enables this function. Please refer to [section: Audit Trails](#) for further information.

The order and the content of the blocks shown at **Home** can be modified for each individual user. You may change the display order of these blocks at home by drag and drop. You may change the content by clicking **[My Preferences]** and the **[Edit]** button. Mark the information blocks you want to see at your home page display.

In addition, you may define the conditions of displaying entries such as the **Default Lead View** and **Default Calendar View**.

## Global Search Function

The Home pages provides a powerful search function that allows you to search the entire database. You may search for any terms. Fill in the search field and hit the **[Find]** button, as shown in [figure: Global Search](#).



Figure 1.5. Global Search



### Tip

The % character can be used as a wild card for the search. For example, if you have two contacts spelled "Meyer" and "Mayer" you may search for both by entering "M%yer" as a search term.

### Quick-Menu

The Quick-Menu at Home allows you to jump quickly to an entry page. At the drop down menu select the new entry you want to make.



### Note

The Quick-Menu has only limited capabilities for entering data. For the full set of options available look at section [Chapter 2: Data Entries](#).

## 1.2.5. Access Privileges

Your access privileges to the CRM system are set by the administrator when configuring the CRM system. The following privilege types are available:

- The permission to use certain CRM modules.
- The permission to view data in certain CRM modules.
- The permission to edit or to change data in certain CRM modules.
- The permission to delete data in certain CRM modules.
- The permission to export or import data from certain CRM modules.

The CRM system makes sure that you can only exercise certain operations if you have the proper privileges. You may get further information at [Chapter 4: Administrative Tasks](#). Please contact your system administrator if you want to know more about the privileges set in your system or if you want to have them changed.

## 1.2.6. How to Start?

To best use, the CRM system needs to be configured based on your company's needs. Every user with administrator privileges is allowed to modify the basic settings. All the possibilities are described in [chapter: User Administration](#) of this manual. In addition, there are many functions available which allow users to configure the presentation of data without changing the basic settings and without administrator access privileges. All the options will be explained in the following sections.

Even without a lot of configuration you will quickly be able to start with the CRM system. The data about customers are the core of each CRM system. So you may start to enter such data. Since the CRM system is much more than a simple storage system, I recommend that you make yourself familiar with the sales process as described in [section: The Sales Process](#). Start with entering customer data as a **Lead**. Then convert such a lead into a **Sales Potential**. Watch how contacts, accounts and potentials are generated automatically. You may also import lead data from your existing office environment to speed up the process.

As the **first step I** recommend to start with entering the most important contact information of your active customers. You may add further information later. You will also need to enter your company as an account

and employees data as contacts. You will need these data to efficiently communicate with other users. For further instructions please refer to [section: Customer contacts](#). After you have entered your contacts, you will have a wide variety of automated CRM functions available.

As the **second step** I recommend that you begin with entering your product and/or service offerings. In [section: Product Related Entries](#) you will find detailed instructions for entering product and service information as well as price books. Again, start with entering only the most important information. You may append the data later.

If multiple users start using the CRM at the same time, please keep in mind that you have to enter any kind of information only once. Make sure that you communicate with the others.

Use your CRM data immediately when you schedule the next customer contact. Get yourself familiar with the activity functions as they are described in [section: Calendar and Activities](#) and define your sales process by different sales stages.

Over time you will improve your capabilities to operate the system step by step. In a short time you will experience the use of the system as a habit.

## Chapter 2. Data Entries for the CRM System

The CRM system offers you almost endless possibilities to enter, to process or to display your business data. That includes:

- a full **steering of your entire sales process** starting with the first contact with a prospective client to after sales support, and
- a **contact management** for your customers and vendors or for others, related to individual persons, enterprises or groups,
- a time and priority controlled **activity management**,
- a **product and service catalog**.

You must decide what functions are important to you and your business and what you want to use. The following sections will describe in detail how to enter data into the CRM system and how the data are presented and managed.

### 2.1. Customer contacts

---

The effective administration and utilization of customer contacts is the most important element of a customer relationship management system. Ultimately, all business activities are targeted on customers. The CRM system distinguishes three different contact types:

- Leads
- Contacts to single persons
- Contacts to an organisation, such as legal entities, groups, agencies etc.

The CRM offers you to enter any kind of information to each of these contact types and to link organisation and individual persons to other CRM entries if appropriate.

During the work with the CRM system, contacts should always be linked to the different stages of the sales process, such as leads, potentials or help desk. By referencing to sales stages you will be able to handle your contacts efficiently.

The following example describes a typical sales procedure:

- Based on a first contact to a prospective customer a Lead will be created. As this sales stage it is not clear whether there will be a business opportunity. This Lead will contain all the information about the contact or the account available at this sales stage.
- The Lead status of this contact will be maintained until it is clear whether there is a business opportunity. All activities related to this Lead will be listed within the CRM.

If there is a business opportunity, the Lead will be converted to a Potential. At the same time contacts and accounts are created automatically and the Lead will be deleted. All the information collected for the Lead is still available but will now be presented based on the basis of their content in contacts, accounts or potentials.

By using this procedure, only those contacts and accounts are created which have a chance to become a busi-

ness. The CRM system will not be overloaded with useless data.

In addition, you may enter new accounts or contacts directly if they do not fit to the described procedure. This might be true for your own employees, partner of your company, personal contacts etc.

### 2.1.1. New Leads

The sales process supported by the CRM has been divided into the following steps:

- Lead
- Potential
- Quote
- Sales and Purchase Order
- Invoice
- Service

You will find a more detailed description in [section: The Sales Process](#).

Leads are your first contact to a prospective customer. You may collect leads from your marketing activities such as trade shows, advertisement, presentations etc. Probably, most of your leads will not lead to a business.



#### Tip

If you click **[New Lead]** at the Quick-Create menu, you are offered a quick entry menu for leads, but only for name, company, phone and email entries.

If you want to collect more detailed lead information, you may click the **[Sales]** tab at the navigation area shown in [figure: Top Area](#). Use the **plus icon** to open the edit view for a new lead as shown in [figure: New Lead](#). Now you can enter all the lead information you have.



#### Important

Entry field marked by a "\*" are mandatory.



#### Note

With version 5.0.4 role based pick lists have been introduced. Please refer to [chapter: Picklist Editor](#) for more information.

Click **[Save]** to send your entries to the CRM system.

**Creating New Lead**

Basic Information		More Information	
Save Cancel			
<b>Lead Information</b>			
First Name	<input type="text" value="-None-"/>	Phone	<input type="text"/>
*Last Name	<input type="text"/>	Mobile	<input type="text"/>
*Company	<input type="text"/>	Fax	<input type="text"/>
Designation	<input type="text"/>	Email	<input type="text"/>
Lead Source	<input type="text" value="-None-"/>	Lead Status	<input type="text" value="-None-"/>
Assigned to	<input checked="" type="radio"/> User <input type="radio"/> Group <input type="text" value="admin"/>		
<b>Address Information</b>			
Street	<input type="text"/>	Po Box	<input type="text"/>
Postal Code	<input type="text"/>	City	<input type="text"/>
Country	<input type="text"/>	State	<input type="text"/>
<b>Description Information</b>			
Description	<input type="text"/>		
Save Cancel			

Figure 2.1. New Lead

**Tip**

If you create a lead, this lead will be assigned to you automatically. You may assign the lead to a different CRM user or user group by changing the content of the "Assigned To:" field to a different person or to a team.

### 2.1.2. New Accounts

It is most efficient way is to create a new account from a lead as described at [section: Creating Potentials from Leads](#). However, sometimes it will be necessary to enter new accounts directly. This is helpful, for instance, if you want to have competitors, private contacts or special contacts also stored in your CRM system. Since account information can contain references to contacts, it is always advisable to enter the account information first before you take care about the contact information. When you add a contact to the CRM system later, the related account information will already be available.

To create a new account, click **[New Account]** at the entry Quick-Create menu shown in [figure: Top Area](#) or goto **[Sales] -> [Accounts]** and click the **plus icon**. An new window will open as shown in [figure: New Account - Basic Information](#).

## Creating New Account



Basic Information		More Information	
Save Cancel			
<b>Account Information</b>			
*Account Name	crm-now	Phone	+49 30 3900 1800
Website	http:// www.crm-now.com	Fax	+49 30 451 3987
Ticker Symbol		Member Of	Muster AG  
Email	info@crm-now.com	Assigned To	<input checked="" type="radio"/> User <input type="radio"/> Group admin
<b>Address Information</b>			
		<input checked="" type="radio"/> Copy Shipping address	<input type="radio"/> Copy Billing address
Billing Address	Am Borsigturm 46	Shipping Address	
Billing Po Box		Shipping Po Box	
Billing City	Berlin	Shipping City	
Billing State		Shipping State	
Billing Code	13507	Shipping Code	
Billing Country	Germany	Shipping Country	
<b>Description Information</b>			
Description	CRM on demand provider		
Save Cancel			

Figure 2.2. New Account - Basic Information

Now you can enter the basic account information. You should only enter information which is relevant to you or to your business. The illustration exemplify already some entries. Non-relevant entry fields can remain empty or should be removed by your CRM system administrator. You may also consider to use customized fields. If several user have writing access to the same entry fields, make sure that you agree on a common standard for making entries.

With version 5.0.4 role based pick lists have been introduced. Please refer to [chapter: Picklist Editor](#) for more information.

In case you want to use the Locate Map function of the CRM system in another country than the USA, you must include the country information.

You may add further account information by clicking the **[More Information]** tab as shown in [figure: New Account - More Information](#).

## Creating New Account



Basic Information		More Information	
Save Cancel			
<b>Account Information</b>			
Ticker Symbol		Other Phone	
Member Of	 	Employees	
Other Email		Ownership	
Rating		industry	--None--
SIC Code		Type	--None--
Annual Revenue: (\$)		Email Opt Out	<input type="checkbox"/>
Notify Owner	<input type="checkbox"/>		
Save Cancel			

Figure 2.3. New Account - More Information





### Important

Some entry fields refer to information already stored in the CRM system. You can see this, for instance, for the **Member of** entry in [figure: New Account - More Information](#). Here **you cannot** make a direct entry. You have to click the folder icon at the end of this line. Then a new window will open that displays the data already stored at the CRM system. When you make a selection this window will close automatically.

Click the **[Save]** button to transfer your data to the CRM system.

## 2.1.3. New Contacts

If you want to enter contact information to individuals, please click **[New Contact]** at the entry Quick-Create menu or goto **[Sales] -> [Contacts]** and click the **plus icon**. A new window as shown in [figure: New Contact - Basic Information](#) will open.

### Creating New Contact



Basic Information		More Information	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>			
<b>Contact Information</b>			
First Name	Dear Mr. <input type="text"/>	Office Phone	<input type="text"/>
*Last Name	<input type="text"/>	Mobile	<input type="text"/>
Account Name	<input type="text"/>  	Lead Source	--None-- <input type="text"/>
Title	<input type="text"/>	Fax	<input type="text"/>
Email	<input type="text"/>	Assigned To	<input checked="" type="radio"/> User <input type="radio"/> Group admin <input type="text"/>
<b>Address Information</b>			
		<input type="radio"/> Copy Other Address	<input type="radio"/> Copy Mailing Address
Mailing Street	<input type="text"/>	Other Street	<input type="text"/>
Mailing PO Box	<input type="text"/>	Other PO Box	<input type="text"/>
Mailing City	<input type="text"/>	Other City	<input type="text"/>
Mailing State	<input type="text"/>	Other State	<input type="text"/>
Mailing Postal Code	<input type="text"/>	Other Postal Code	<input type="text"/>
Mailing Country	<input type="text"/>	Other Country	<input type="text"/>
<b>Description Information</b>			
Description	<input type="text"/>		
<input type="button" value="Save"/> <input type="button" value="Cancel"/>			

Figure 2.4. New Contact - Basic Information

The offered standard fields are self-explanatory.



### Important

A Last Name entry should be one word only if you plan to synchronize your data with Outlook. For instance, if the last name is Mc Murphy make an entry like Mc-Murphy otherwise Murphy will be counted as the middle name.

Make sure that all CRM users agree on the same purpose for each entry field. Your CRM administrator may remove those standard fields which are not suitable for your company based on profiles, or add additional entry fields as explained in [chapter: User Administration](#).



### Note

With version 5.0.4 role based pick lists have been introduced. Please refer to [chapter: Picklist Editor](#) for more information.

If you click the **[More Information]** tab shown at [figure: New Contact - Basic Information](#), you may add further information to the contact as illustrated in [figure: New Contact - More Information](#).

#### Creating New Contact

Figure 2.5. New Contact - More Information

While most are self-explanatory, the following fields serve special purposes:

Table 2.1. Contact Information

Email Opt Out:	Contacts which have this check box selected will not receive email messages which are normally sent to them by the CRM system. The CRM system will also not send automatic emails to these contacts. This helps you, for instance, to respect the contact's wishes when it comes to privacy.
Reports To:	Here you may chose the name of the supervisor if the contact has been entered already.
Do Not Call:	Mark this check box to indicate that the contact does not wish to receive calls.
Reference:	You may use this check box to indicate whether this contact is willing to serve as a reference for you business with other customers.
Notify Owner:	When you mark this check box, the owner of the contact will be informed by e-mail whenever the data change.
Contact Image:	If available, you may also upload a contact image to the CRM. Please note that this image must be in the *.png, *.jpg or *.gif format. Note that this image will be also displayed as an icon at the contacts list

	view. A mouseover function for this icon is provided at the list view which displays the full image.
--	--

You may also use this entry page to allow contacts to access the **Customer Portal**. The Customer Portal provides contacts with a limited access to the CRM help desk functions. Please refer to [section: Customer Portal](#) in this manual and to the Customer Portal manual (see [Appendix: Ressources](#)) for further information.

 **Caution**

If you enable the customer portal for a contact by marking the **Portal User** check box, the CRM system will automatically generate an e-mail and will send it to this contact immediately upon your clicking the [**Save**] button. (You must have the outgoing mail server configured.) This e-mail will contain the user name and password for accessing the customer portal. It is advised to inform your contact of this automatically generated message in advance by a separate e-mail.

Click the [**Save**] button to transfer the entries to the CRM system.

### 2.1.4. Export and Import of Leads, Contacts, Accounts and Vendors

The export and import functions will help you to exchange data between your office environment and the CRM system. CRM data can be used by a large variety of other applications at your office.


 **Tip**

In addition to leads, contacts, accounts, and vendors, data for products and potentials can be imported and exported. Furthermore, notes and e-mails can be exported. Please refer to the proper sections in this manual for further information.

To export or to import data, click a module name as shown in [figure: Top Area](#). You will get to the **List View**. At the top of the list, as shown in [figure: Contact List View](#), you will find the import and export tools icons.



**Figure 2.6. Contact List View**

 **Important**

You can only use the export and import tools if they have been enabled by the CRM system administrator.

 **Note**

The CRM system is using a character set which is UTF-8 (Unicode compatible) coded. Unicode is an industry standard allowing computers to consistently represent and manipulate text expressed in any of the world's writing systems.



### Tip

For the importing and exporting contact data, you may also consider the MS Outlook plugin for Windows computer or the Thunderbird extension for Linux, Mac and Windows, as they are provided with the CRM system.

The following section describes the import and export function for contacts. If you want to import or export accounts or other modules, you can use this description accordingly.

## Import Contacts

Click [**Import Contacts**] at the Tool tab as shown at [figure: Contact List View](#). A new window will open as shown in [figure: Import Contacts, Step 1](#)

**Import Contacts**

**Step 1 of 3 : Select the .CSV File**

vtiger CRM supports importing records from .csv ( **Comma Separated Values** ) files. To start import, browse to locate the .CSV file and click on the Next button to Continue.

**File Location :**    Has Header

**Figure 2.7. Contact Import, Step 1**

You have to select your data source by browsing your computer or network.



### Note

You can find sample import data at [section: Data Format for Imports](#). This section also explains how you can create your own data sources. If your data contain more information than the available fields in the CRM system can provide, you can start to use **User Defined Fields** as explained in [section: Custom Fields](#).



### Important

Because of possible timeouts with the CRM standard version it is suggested not to import more than 499 customer contacts with a single import operation. (Your administrator may change this number.) If you have to import more data, you need to split your files before import and repeat the import operation. All the data you intend to import must contain the mandatory fields as they are marked by a [\*] sign at the contacts edit view.

If you have created a file that meets the requirements, you can upload the file into the CRM system. Click [**Next**] to continue.

For the second step, a new window will open as shown in [figure: Contact Import, Step 2](#).

**Import Contacts**

**Step 2 of 3 : Contacts List & Mapping**

The following tables shows the imported Contacts and other details. To map the fields, select the corresponding in combo boxes for each Contacts.

Use Saved Mapping : -Select-

Mapping	Headers :	Row 1	Row 2
<span style="border: 1px solid gray; padding: 2px;">First Name</span>	First Name	Max	Joe
<span style="border: 1px solid gray; padding: 2px;">Last Name *</span>	Last Name	Samplemen	Brown
<span style="border: 1px solid gray; padding: 2px;">Home Phone</span>	Phone	5121-28631234	1122-23456788

Save as Custom Mapping :

< Back
Import Now >

**Figure 2.8. Contact Import, Step 2**

At this site you have to link your data with the according CRM fields. You see the standard fields as they are offered by the CRM, and your custom fields if you have created them beforehand. It is not necessary that you to create references for all data types in your file, but you must link the mandatory fields. In the illustration you can see sample entries.



### Tip

If you have to make multiple imports, the CRM offers you to store the references you have selected for future use. Mark the check box [**Save as Custom Mapping**] and write a name of this reference into the entry field. Make sure that this name has not been used before. This Custom Mapping will be available at step 2 as **Use Saved Mapping** when you make the next import.

When you have set all references, click [**Import Now**] to transfer your data to the data base.

At the last import step the CRM shows you the result of the import operation as you can see it in [figure: Contact Import, Step 3](#). Below you will see a list of all imported contacts.

**Import Contacts**

**Step 3 of 3 : Mapping Results**

**Success!**

No. of Records Successfully Imported : 2

No. of Records Skipped as they were missing one or more required fields : 0

Undo Last Import
Finished
Import More

**Figure 2.9. Contact Import, Step 3**

Now you can review your import, accept it or reject it.



### Tip

If you import contacts with account information, the import will generate contact and account entries which refer to each other. During an import the CRM checks whether the contacts account name already exists. If it does, it will link the imported contact to the existing account automatically.

Therefore, it is always better to import the accounts first.

**Note**

The vtiger community is very active in developing CRM extensions that may help you to import data from other CRM applications and other programs. You may check out these community projects at the online vtiger forge.

**Export Data**

With version 5.0.4 the export functions have been improved. You may select the following criteria for your export:

- all records of this module
- only the records you have marked at the list view of this module
- all records which meets your search criteria at the list view of this module
- all data of the current page at the list view of this module without search criteria set

**Important**

Your data are exported in the UTF-8 format. For further use you may have to convert these data to the character set used in your language. Please refer to [chapter: UTF-8 coding tools](#) for further information about UTF-8 and convenient conversion tools.

Therefore you have to make your decision at the list view about the data you would like to export, before you hit the export icon. For instance, if you would like to export all records of contacts where the last name starts with a **B**, make a search as explained in [section: List Search](#) with **B** as your search criteria. Afterwards hit the **[export icon]** at the list view menu, if this function is available to you, and the menu as shown in [figure: Export selection](#) will be displayed.

**Sales > Contacts**

**Contacts >> Export**

**Export Search Criteria Records:**

Export with search records

Export without search records

**Export Records Types:**

Export all data

Export data in current page

Export selected records

**Export Contacts** **Cancel**

**Figure 2.10. Export selection**

At this menu you may change you selection criteria if desired and click the [Export Contacts] button. A new window for uploading data to your computer opens. The upload window you will see depends on your operating system. If you have a Windows computer, you will see a window as shown in [figure: Export Contacts](#).



**Figure 2.11. Export Contacts**

If you click [OK], all data will be exported to your computer. The data are provided as ASCII file with comma separated values, also called CSV format.



### Important

Since the format of the exported data is different than the data format required for an import you cannot use exported data for an import directly.

## 2.1.5. Data Format for Imports

Before you can import data you have to format these data in order to meet the CRM's requirements.

**The first requirement** is that the data must be presented in the ASCII format with comma separated values (CSV). The CSV file format is often used to exchange data between disparate applications.



### Note

A common standard for the CSV format does not exist.

If you want to import data, these data must be formatted according to the following rules:

- All fields are separated by commas and must be individually wrapped by double-quote characters.
- All data sets must include the mandatory fields (e.g. Last Name and Company for leads).
- Fields that contain embedded line-breaks or fields with leading or trailing spaces are not allowed.
- Number fields have to contain numbers only without "." or "," characters (for instance, use 3800 instead of 3,800).
- Fields that contain double quote characters should be avoided. If you have to use them, they must be surrounded by double-quotes, and the embedded double-quotes must each be represented by a pair of consecutive double quotes.
- The first record in your file may be a header record containing column (field) names.
- Dates must be imported in the following format: year-month-day hour:minute:second, for example:

"2008-01-07 00:00:00"

- Entries for Multi-Select Combo Boxes must be separated by a |##| character string, for example: "America |##| Europe"
- Check boxes must be imported in the following format: 1 for yes, 0 for no

In [figure: Sample for Lead Import File](#) a sample file for lead import is shown. Each line represents a data set.

```
" Company" , "Street" , "City" , "Postalcode" , "Country" , "Phone" , "Lastname"  
"SampleInc" , "Samplestreet 123" , "Samplecity" , "12345" , "Germany" , "(123) 45678" , "Miller"  
"Xyzcompany" , "Xyzstreet 321" , "Xyzcity" , "54321" , "Germany" , " " , "Jane"
```

**Figure 2.12. Sample for Lead Import File**



### Important

If you do not have all a full set of lead data available, you must use wrap an empty entry by double-quote characters as it can be seen in the figure above for the missing telephone number in line 3.

**The second requirement** is that all your data must use the UTF-8 character set. Please refer to [chapter: UTF-8 coding tools](#) for further information.

**The third requirement** is that you have to include custom fields with your import if you have created such fields before. In case you do not have a content for the custom fields you may leave the field in your data list empty but you must import it. If you do not import these fields, the status of these fields in your CRM's database remains undefined and you can not use such fields for filter functions.

## 2.1.6. Hints for CSV and Excel Formats

The file formats used in Microsoft Excel have become a pseudo standard throughout the industry, even among non-Microsoft platforms.

Excel is an application that also produces and uses CSV. Unfortunately, depending on your Excel version the import of CSV data may cause some problems. Some Excel versions do not automatically accept comma separated values. If you experience that after open of exported CRM data, all fields are listed in one column, you may use the following instructions for clean them up:

- Import the CSV file, rather than just opening it. On the Data Menu, choose Import External Data, then import your data. Browse to the CSV file from the CRM, and click Open. This brings up the Text Import Wizard.
- In step 1, select **Delimited**.
- In step 2, check **Comma**. You will see a preview that shows how the data will be separated.
- In step 3, you can select each column in turn and choose a format. For the CRM date choose Text and you will get a well sorted Excel sheet.



### Tip

If your data contain line feed or carriage return characters, you have to remove these before importing the data into Excel. Such characters might be created by the CRM system if you have entries that use multiple lines. This might for instance be the case if you separate street name and suite number in an



address entry by an additional line.

If you want to import contact data from your office application, you need to make sure that these data are well formed. The following list describes how you may use contact data from your MS Outlook:

### 1. Check the data format:

Unfortunately, in the most cases, data to be imported need to be checked and modified manually before importing. That is a necessary task to make sure that all data are well formed.

- Export your contact data from Outlook in the Excel format.
- Start Excel and open your data file.
- Look for any special characters such as commas (,) semicolon (;) and double-quote (") and substitute those, e.g. by a space character.
- Look up the column that contains the mandatory fields. Make sure that each individual data set has a mandatory entry. Do not use any special characters.
- Remove all columns which you do not need at the CRM system.
- Check the content of each individual entry. Make sure that it contains the information you intend to have there. Removing wrong entries later at the CRM system will cause a lot of work. It is better to do it now.

### 2. Create a CSV file

If you are sure that you have valid and good data, you need to create a CSV file that fits into the CRM system. There is an Excel Macro online available at the vtiger forge (see <http://forge.vtiger.com/projects/excelimptool/>) that does the formatting for you and exports a well formed CSV file. If you want to do it manually, the following procedure has proven to work quite well:

- For practical reasons add a column at the beginning. Enter the term "Start1111" (without the " character) in each field for each data set .
- Also for practical reasons add a column at the end. Enter the term "End2222" (without the " character) in each field for each data set.
- Save your data as CSV file.
- Open the file with a plain text editor (not MS Word!).
- Substitute all "Start1111" entries by a " character, substitute all "End2222" entries by a " character and substitute all ; characters by the string ","
- Save your data. Now you have a well formed file that you can import as explained in [section: Import Contacts](#).

After you created the CSV file you must make sure that this file is compatible to the UTF-8 character set format.

---

## 2.2. Calendar and Activities

---

The CRM system provides a calendar such as you would normally find at your desktop. This calendar distinguishes between meetings, calls (both often referred to as **Events**) and tasks (**ToDos**), all together called activities. The operational differences between **Events** and **ToDos** will be explained in the following sections.



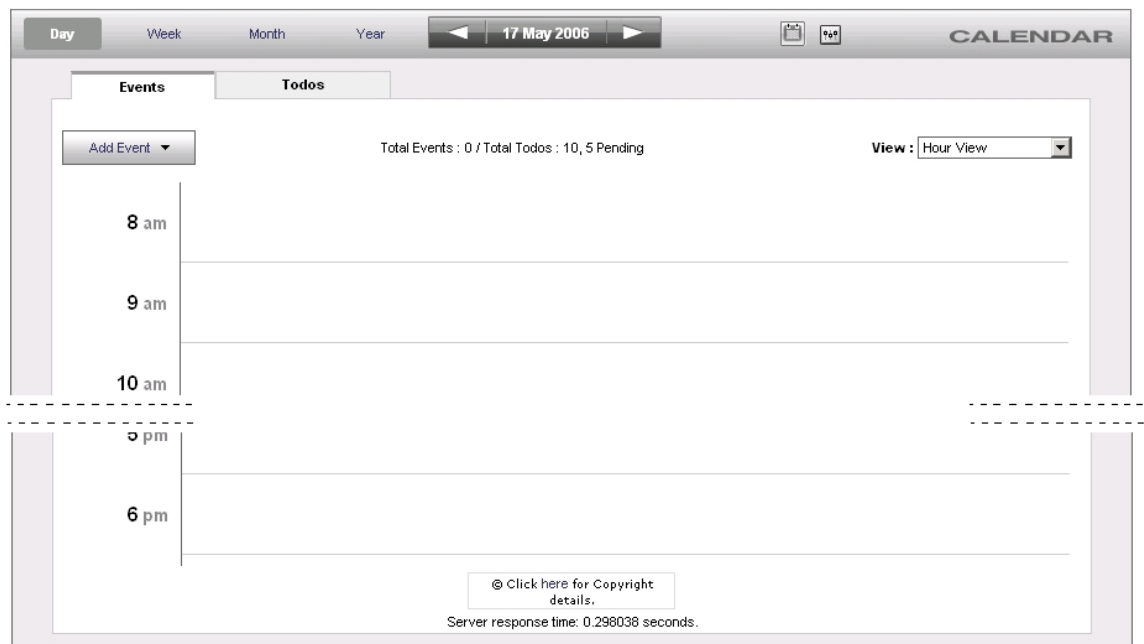
### Important

Be careful when scheduling your activities. Even if you consider a meeting as a task, the CRM system does not. You will find more about tasks in [section: Tasks and Todos](#).

The CRM system offers you several possibilities to enter or to schedule calendar related activities. You might use the calendar directly, the Quick-Menu, or you might create activities during the sales process at Leads or Potentials, or during services at the Trouble Ticket menu. Calendar entries can and should be linked to other data stored in CRM system, such as contacts, leads or accounts. Not only does the CRM system help you to schedule activities, it also provides you with a set of tools for efficiently managing activities throughout your organization.

## 2.2.1. Calendar

If you want use the calendar to schedule an event or task, click either on the calendar icon at any list view or **[Calendar]** at the navigation area. A new window will open which will display, depending on your system setup, either the calendars list or the hour view. The hour view is shown in [figure: Calendar - Hourly View](#).



**Figure 2.13. Calendar - Hour View**

At this view all events scheduled for a particular day are displayed. You may switch to a weekly, monthly or yearly view by clicking the appropriate icon at the top of the daily calendar. You may also switch to a list view.

### Adding an Event to the Calendar

To enter the schedule of a meeting or call click the **[Add Event]** button and select your event type. A pop up window within the calendar will open as shown in [figure: New Event](#).

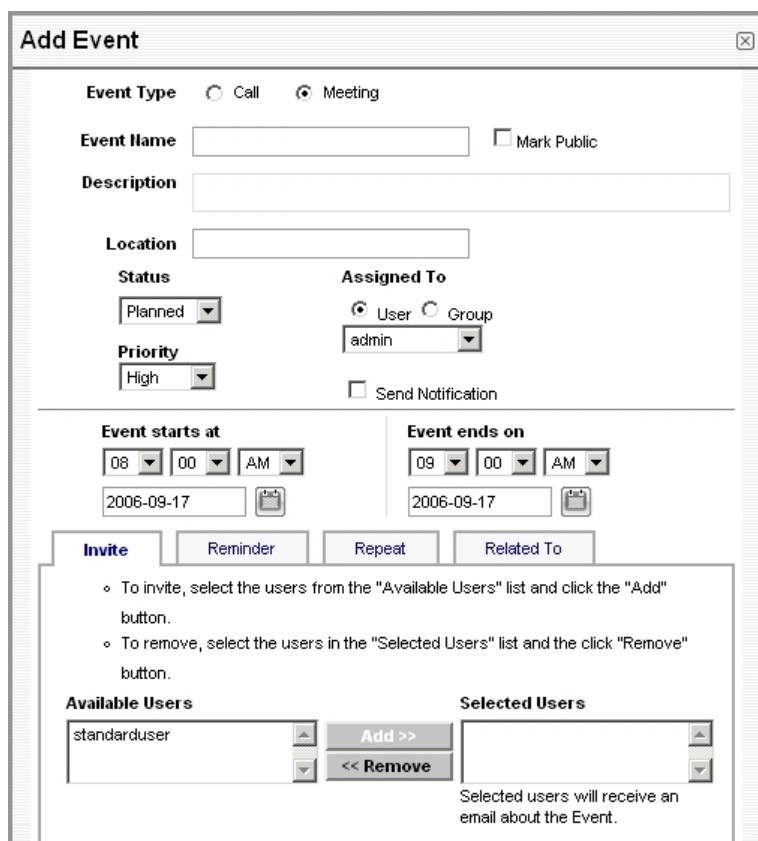


Figure 2.14. New Event (Call or Meeting)

Here you may enter your event information.

Table 2.2. Overview event information

Event type:	Select call or meeting.
Event name:	A mandatory field; you must provide a name for the event.
Description:	You may add a short description of this event.
Mark Public:	You may mark an event as <b>Public</b> , so that a newly created event is shared with other users. Look at <a href="#">section: Calendar Sharing</a> for further information.
Status:	By default the status is set to <b>planned</b> . If the status is set to <b>planned</b> you can only make entries which are dated in the future. If you want to make entries for the past, set the status to <b>Held</b> or <b>Completed</b> .
Priority:	You may set a priority.
Assigned to:	By default the creating user is the owner of the event. You may change it if necessary.
Send Notification:	If you mark this check box, an e-mail with the actual event information will be sent to the owner of the event. You may use this function for instance if the event owner changes.
Start Date/Time and End:	Every event has a beginning and an end. You may choose to have an end date days later. This is for instance the case if you have business trip of several days.
Invite:	You may invite other users to this event by following the instruction displayed. Note that these users will receive an automatic e-mail with the event information as content.

You may click the **[Reminder]** tab, to schedule an automatic reminder e-mail to be send by the CRM as shown in [figure: Event Reminder](#).

**Figure 2.15. Event Reminder**

For the reminder message you have to enter the time. The current version does not allow you to change the e-mail address. This may change in the future.

In addition, the CRM allows you to schedule events which occur on regular basis. Click the **[Repeat]** tab, to make your settings. The dialog is shown in [figure: Repeating Events](#).

**Figure 2.16. Repeating Events**

Furthermore, you may link an event with your contacts as demonstrated in [figure: Event Relations](#).

**Figure 2.17. Event Relations**

Finally, click **[Save]** to transfer the event schedule to the CRM. As a result you will see the event listed in your calendar.

### Note

Each individual user has its own calendar. However, you may invite other CRM users to calls or meetings and/or share your calendar with other users as explained in [section: Calendar Sharing](#). The calendar is displayed in the browser defined language. If you see the calendar in a wrong language, please check your browser settings.

## Tasks and Todos

The CRM system helps you to schedule tasks which are also sometimes called ToDos. Tasks are always assigned to one CRM user or Group and do not have an end date. You cannot invite other users to tasks nor can you link more than one contact with tasks. However, you may transfer tasks to others by changing the owner.



### Important

Tasks are separated from your calendar as ToDos. They are also displayed at the **Upcoming and Pending Activities** list at the users **Home** page.

There are many places at the CRM where you can enter tasks. You may enter tasks at any detail view of steps in your sales process or in the calendar. The edit view window as shown in [figure: New Task / ToDo](#) will open and you may enter your task information. Please note the mandatory fields.

**Figure 2.18. New Task / ToDo**

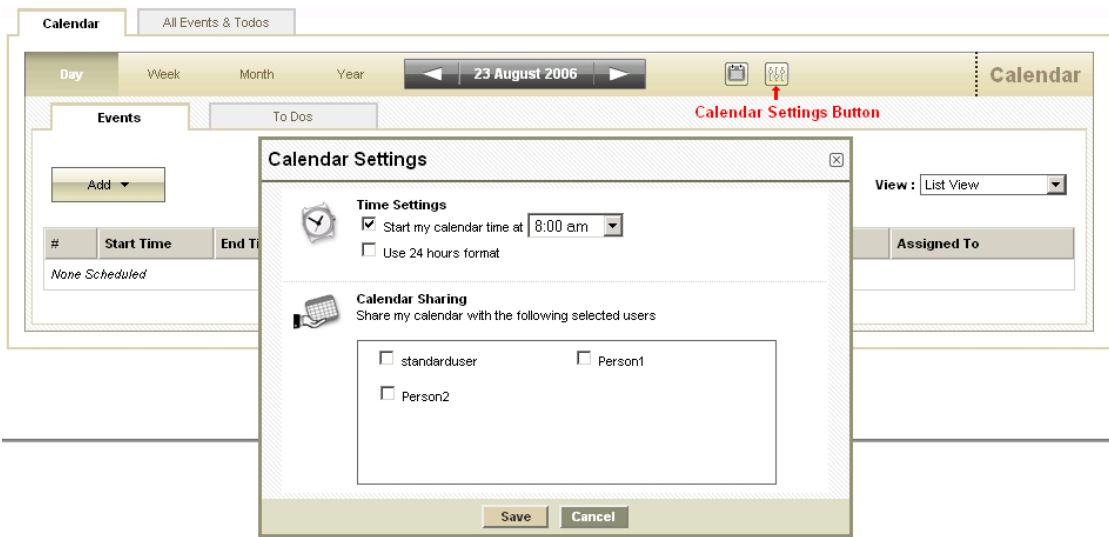
When you are finished click [**Save**] to store the task at the CRM system.

## Calendar Sharing

By default, every user's calendar is set to private and there is no sharing access. However, you may share your calendar or specific event entries with other CRM system users.

1. Sharing with any CRM user defined by the calendar settings:

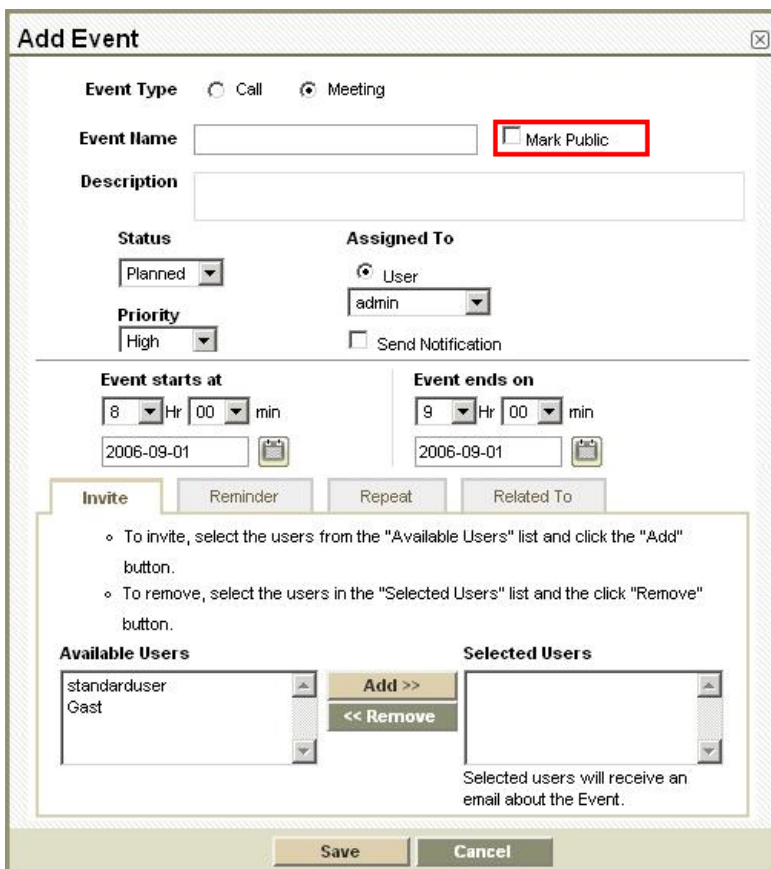
Select [**Calendar View**]-> Click [**Calendar Settings**] icon -->In Calendar Settings pop-up, select the list of users with whom you want to share your calendar as displayed in [figure: Calendar Settings](#). All events which are marked as public, will be visible to the shared users. Other users may also edit this shared event but are not allowed to delete it.



**Figure 2.19. Calendar Settings**

2. Event related sharing with users in the Role based hierarchy:

Irrespective of sharing events settings at your calendar, other users in the role-based hierarchy can view specific events at other users calendar if these events have been made public. To make a particular event public, mark the **[Public]** check box as displayed in [figure: Sharing Event Settings](#) when you create a new event.



**Figure 2.20. Sharing Event Settings**

## Calendar Settings

In [section: Calendar Sharing](#) is already explained how you can access the calendar settings in order to configure the sharing functions. In addition to the calendar sharing function you may configure the time your calendar starts and the time format. Please look at [figure: Calendar Settings](#) for further reference.

### 2.2.2. All Events and ToDos

If you want to see all activities in one list you may click the [**All Events & ToDos**] tab at the Calendar menu as exemplary shown in [figure: All Events and ToDos View - List View](#).

<input type="checkbox"/>	Status	Type	Subject	Related To	Start Date	End Date	Assigned To	Close	Action
<input type="checkbox"/>	Planned	Task	Testtask for Demo only		2006-08-24		admin	X	edit   del
<input type="checkbox"/>	Planned	Meeting	Testmeeting for Demo only		2006-08-23	2006-08-23	admin	X	edit   del
<input type="checkbox"/>	Planned	Call	Testcall for Demo only		2006-08-23	2006-08-23	admin	X	edit   del

**Figure 2.21. All Events and ToDos - List View**

You can change the list according to your own criteria. Please refer to [section: Working with Lists](#) for further instruction on how to modify the list view. You may also mark an activity as closed by clicking the [X] sign.

At the list view you can click the name of an activity to enter the detail view as shown in [figure: All Events and ToDos - Detail View](#). At the detail view you can change details by editing, add an entry to the tag cloud, or duplicate the activity for a new entry.

**[ 12 ] Testtask for Demo only - To Do Information**  
Updated today (23 Aug 2006)

Edit Duplicate Delete

**Task Information**

**To Do :** Testtask for Demo only

**Time & Date :** 08:00am  
2006-08-24

**Priority :** High

**Created Time :** 2006-08-23 16:11:43 **Modified Time :** 2006-08-23 17:04:14

Notification Related To

Send Notification : No

Edit Duplicate Delete

Add Tag

TAG CLOUD

**Figure 2.22. All Events and ToDos - Detail View**

### 2.2.3. Import and Export of Activities

For importing or exporting activities to or from your office environment, the CRM comes with a set of exten-

sions you may want to install at your computer. This includes an Outlook plugin for Windows computer or a Thunderbird & Mozilla extension for Windows, Mac or Linux.

For further information on these extensions use the relevant manuals as listed in [Appendix: Ressources](#) or look at [section: Synchronizing CRM with Office Environment](#) of this manual.

## 2.3. The Sales Process

---

You may use the CRM system to accomplish your entire sales process from the first contact with a prospective customer to the after-sales services. The CRM system considers, that during this process different requirements for necessary data, sales force automation, reporting and others exist. The following sales process phases are offered by the CRM and explained in the following sections:

1. Leads
2. Potentials (sorted by different stage, priorities and other criteria)
3. Quotes
4. Sales and purchase orders
5. Invoices
6. Help desk with ticket system and FAQ

The sales phases are connected closely with the contact and activity management, product and service catalogues and powerful reports.



### Tip

Use the CRM's capability to automatically generate a subsequent operation from a given sales phase. You can continue to use the entered data. Only if there is no predecessor, you may choose to enter the information to a sales phase directly.

### 2.3.1. Leads

Lead are the first phase in establishing a customer relationship. Your company may get leads from marketing activities such as trade shows, advertisement or press releases. At this phase you do not know whether this first contact will lead to a business opportunity.



### Important

Usually or unfortunately, most of your Leads will not generate any business transactions. The CRM system considers this by treating Leads different from all other contact information stored in the CRM. It is sensible to avoid useless Leads loading the CRM system unnecessarily. For this reason Leads are not linked to other account or contact information.

If you create a Lead, you can capture the following customer related data:


- Contact data to a single person or organization



- Description for a lead
- Assessment of value of a particular lead for your company

These data will be stored as master lead data within your CRM. Your administrator may modify the type and amount of master data necessary for your business. As explained in [section: New Leads](#), a lead is most likely the best starting point for you to enter customer data into your CRM system. Please refer to this section if you want to create a new lead. Use the lead copy function as a practical tool if you have to create multiple leads which do not differ much.

If you want to find a lead in your CRM or to add information to an existing lead, go to the **Sales > Leads** menu at the navigation area. A list of all your existing leads will be shown as illustrated in [figure: Leads - List View](#).

Sales > Leads 

<input type="checkbox"/>	Last Name	First Name	Company	Phone	Website	Email	Assigned To
<input type="checkbox"/>	Brown	Elizabeth	X-ceed inc 99	(244) 419-0431	www.x-ceedinc99.com	elizabeth_brown@company.com	admin
<input type="checkbox"/>	Davis	Jennifer	Vtiger	(327) 509-5159	www..com	jennifer_davis@company.com	admin
<input type="checkbox"/>	Johnson	Patricia	T3m invest a/s	(037) 786-3910	www.t3minvesta/s.com	patricia_johnson@company.com	admin
<input type="checkbox"/>	Jones	Barbara	Vtigercrm inc	(915) 733-3430	www.vtigercrm.com	barbara_jones@company.com	admin
<input type="checkbox"/>	Miller	Maria	T3m invest a/s	(954) 752-5138	www..com	maria_miller@company.com	admin
<input type="checkbox"/>	Moore	Margaret	Vtigercrm inc	(580) 073-0509	www..com	margaret_moore@company.com	admin
<input type="checkbox"/>	Smith	Mary	Vtiger	(399) 417-6226	www.vtiger.com	mary_smith@company.com	admin
<input type="checkbox"/>	Taylor	Dorothy	X-ceed inc 99	(779) 799-2997	www..com	dorothy_taylor@company.com	admin
<input type="checkbox"/>	Williams	Linda	Edfg group limited	(514) 337-2167	www.edfgrouplimited.com	linda_williams@company.com	admin
<input type="checkbox"/>	Wilson	Susan	Edfg group limited	(590) 163-5049	www..com	susan_wilson@company.com	admin

**Figure 2.23. Leads - List View**

With the magnifying glass icon, the lead list offers you a powerful tools to search and quickly finding any particular information as further explained in [section: List Search](#). At this list view you can also delete leads, or change the owner or status.



### Important

Contents of this list can be configured freely to fit your needs. In addition, the CRM can use these list for an automatic analysis. Please refer to [section: Customize Lists](#) for further information.

## Lead Details

In [figure: Leads - List View](#), some sample leads are already included. To see more information about a particular Lead click [**Last Name**]. A new window will open as shown in [figure: Lead Detail View - Master Data](#). At this site you see the master data of a lead.

**[ 5 ] Carpender John - Lead Information**

Updated 1 day ago (24 Jul 2006)

+adctag

**Lead Information**
More Information

Edit
Duplicate
Delete
Send Mail
Convert Lead

Lead Information			
First Name	Mr. John	Phone	+001 800 888 888
Last Name	Carpender	Mobile	+001 800 888 889
Company	Sample Inc.	Fax	+001 800 888 810
Designation	Teamleader	Email	jc@demo.com
Lead Source	Trade Show	Website	www.demo.com
Industry	Finance	Lead Status	Contacted
Annual Revenue (\$)		Rating	Active
No Of Employees	30	Assigned to User	Salesmanager
Yahoo Id		Created Time	2006-07-24 20:00:48
Modified Time	2006-07-24 20:00:48		

Locate Map

Address Information			
Street	123 Mainstreet	Po Box	
Postal Code	12254	City	Samplecity
Country	Samplecountry	State	Samplestate

Description Information	
Description	for demo purposes only

Edit
Duplicate
Delete
Send Mail
Convert Lead

Select template to Mail Merge:

▼

Merge

**Figure 2.24. Lead Detail View - Master Data**

Once you have provided the full address information, you may want to use the **Locate Map** function of the CRM system to see a map of the location. Please note that the default country is the USA. If you want to use the system for a different country, you have to provide the country information with the address information. It can, however, be that your country is not fully covered.

After clicking the **[More Information]** tab you have the possibility to work with the lead as shown in [figure: Lead Detail View - More Information](#).

**[ 5 ] Carpender John - Lead More Information**

Updated today (26 Jul 2006)

Lead Information
**More Information**

Showing 1 - 1 of 1 Add Task Add Event

Type	Subject	Contact Name	Related To	Start Date	End Date ▼	Recurring Type	Assigned To	Action
Call	return call		Carpender John	2006-07-26	2006-07-26		admin	edit   del

**Emails** Add Email

*None Included*

**Activity History**

*None Included*

**Attachments** Add Note Add Attachment

*None Included*

**Products** Add Product

*None Included*

**Campaigns** Select Campaign

*None Included*

**Figure 2.25. Lead Detail View - More Information**

**Table 2.3. More Information at Leads**

Activities:	You may link this Lead with activities such as calls, meetings or tasks. Here you get a list of all activities related to this lead and you can create new activities.
E-mails:	Here you see a list of all e-mails you have sent to the contact of this lead or you may use the <b>Email</b> button to send e-mails.
History:	Unless they have been deleted, all activities of the past are listed in history and marked as <b>held</b> at the calendar.
Attachment and Notes:	You may add notes or attachments to leads. An attachment can be any type of file such as data sheets, contracts etc.
Products:	You may add information about the products or services which a lead refers to.
Campaign:	You may select a campaign to which a lead is related.

### Lead Import and Export

You may import or export the list of all leads. To use these functions you will need import or export privileges set by your system administrator. Please refer to [section: Export and Import of Leads, Contacts, Accounts and Vendors](#) for further import instructions. Use the description of the import procedure for contacts accordingly.

### 2.3.2. Sales Potentials

In the sales process, sales potentials are the logical successors of leads. Therefore, you may create a sales potential from a lead and transfer all information available for the lead to the new sales potential. In addition, you may create a sales potential directly. Sales potentials are characterized by the fact that an obvious interest of a potential customer in an offer of your company exists. The sales department expects that an offer can be made for this potential customer in the future.

#### Direct Entry of Potentials

If a sales potential arises from a new customer it is recommended that you create a potential from a lead as described in [section: Creating Potentials from Leads](#). For a business opportunity which is not based on a lead you can directly enter a new sales potential. Click the **[plus icon]** at the potential list view. A new window will open as shown in [figure: Potential - Edit View](#).

## Creating New Potential

**Potential Information:**

*Potential Name <input style="width: 95%;" type="text"/>	Amount: (\$) <input style="width: 95%;" type="text"/>
*Account Name <input style="width: 95%;" type="text"/>	Expected Close Date <input style="width: 95%;" type="text" value="2006-07-24"/>
Type <input style="width: 95%;" type="text" value="-None-"/>	Next Step <input style="width: 95%;" type="text"/>
Lead Source <input style="width: 95%;" type="text" value="-None-"/>	*Sales Stage <input style="width: 95%;" type="text" value="Prospecting"/>
Assigned To <input checked="" type="radio"/> User <input style="width: 95%;" type="text" value="admin"/>	Probability (%) <input style="width: 95%;" type="text"/>
Campaign Source <input style="width: 95%;" type="text"/>	

**Description Information:**

Description	<input style="width: 80%;" type="text"/>
-------------	--

Figure 2.26. Potential - Edit View

Now you can enter your data to the sales potential. The following listing refers to the default input mask, which can be changed by your administrator according to your requirements. Please consider the mandatory entries.

Table 2.4. List of default master data entry fields for potentials

Potential Name:	You must give each potential an unique name. For a better overview it is recommended to include the account name.
Amount:	You set an amount of the expected business. Note that this amount will be used by the CRM to decide automatically whether this potential has to be listed at <b>Home / My Top Open Potentials</b> .
Account Name:	Select an account name already stored in your CRM by clicking the <b>[folder icon]</b> at the end of this line. Note that you cannot make a direct entry.
Expected Close Date:	Select a expected close date for this business.
Type:	Select a type of this potential. The type definition can be configured freely by your system administrator.
Next Step:	Enter the next step you want make to get closer to the conclusion of the deal.
Lead Source:	Select a lead source. The source definition can be configured freely by your system administrator.
Sales Stage:	Select a sales stage. The stage definition can be configured freely by your system administrator. Every time you are making progress in selling, you should update this entry.
Assigned To:	Select an owner of this potential. Usually this will be the selling co-worker or a group.
Probability (%):	Here you can enter the probability of the success of the selling activities. You can enter any value from 0-99. 100 should be reserved for a concluded deal.
Campaign Source:	You may enter a reference to an existing campaign.
Description:	You may enter additional information to this potential here.

**Tip**

Be careful in defining sales stages for your company. If you define too many stages, not all your co-workers might be able or willing to maintain a valid data base.

Use the extensive possibilities in this input window to store as much information as you have for this potential. Come to an agreement with your co-workers on how to use the entry fields.

**Additional Information for Potentials**

In order to assign further information directly to a sales potential, click the name of a potential at the potential list view, as displayed at the **Sales > Potentials** menu. You will reach the detail view of the master data as shown in [figure: Potential Detail View - Master Data](#).

**Opportunity Information**
More Information

Edit
Duplicate
Delete
Create Invoice

**Potential Information:**

Potential Name	Sample Potential	Amount (\$)	
Account Name	Sample Inc.	Expected Close Date	2006-07-24
Type	New Business	Next Step	
Lead Source	Public Relations	Sales Stage	Prospecting
Assigned To User	admin	Probability (%)	
Campaign Source		Created Time	2006-07-24 17:15:00
Modified Time	2006-07-24 17:15:00		

**Description Information:**

Description	for demonstration purpose only
-------------	--------------------------------

Edit
Duplicate
Delete
Create Invoice

TAG CLOUD

**Figure 2.27. Potential Detail View - Master Data**

If you click the **[More Information]** tab, you have the possibility of working with the potential and to add further information as shown in [figure: Potential Detail View - More Information](#).

**[ 3 ] Sample Potential - Potential More Information**

Updated today (24 Jul 2006)

**Figure 2.28. Potential Detail View - More Information****Table 2.5. List of more information entry fields for potentials**

Activities:	Here you will see a list of all your activities such as calls, meetings and tasks related to this potential. You may create here also new activities.
Contacts:	Here you see a list of contacts related to this potential. You may select additional contacts already stored in the CRM system.
Products:	Here you can see a list of all products or services this potential is related to. You may select additional products or services from the data base or you can transfer a new product or service to the CRM system.
Sales Stage History:	Every time you change the sales stage, a new entry at this history list will be created.
Attachments and Notes:	You may attach notes or attachments to the sales potential.
Quotes:	Here your quotes related to this potential are listed. If you create a new quote from here, all the potentials master data required for the quote will be transferred automatically.
Sales Order:	Here all your incoming sales orders related to this potential are listed. You might use the CRM's capability of creating sales orders to keep your CRM up to date. This is especially helpful if quotes and sales orders are different.
History:	Here you see a list of all your past activities if they have been marked as held.

**Potentials Import and Export**

You may exchange sales potentials between your computer and the CRM system. Check with your system administrator whether you have the permission to execute such operations. You may use the instructions given in [section: Lead Import and Export](#) for the import and export of potentials accordingly.

### 2.3.3. Quotes

The CRM system supports you in the creation of quotes for potential customers. You may use one of the following ways:

- As described in [section: Additional Information for Potentials](#), you can use the detail view of a sale potential to create a quote by clicking at the **[Add Quote]** button illustrated in [figure: Potential Detail View - More Information](#). You may chose this way for an automatic transfer of the potentials master data to the quote.
- You may also create a quote directly by clicking at the **plus icon** at the quote list view or selecting **[New Quote]** in the Quick-Create menu at the navigation area of [figure: Top Area](#). This will require that you have to set all references, for instance to a sales potential, manually.



#### Important

A quote relies on your product and/or service catalog and the appropriate price lists, as described in [section: Product Related Entries](#). Thus, you must have captured your products and services and as well as your prices in the CRM system before you can create a quote.

The [figure: Quote - Edit View for quote and address information](#) shows the quote and the address information of the edit view for a quote entry.

Sales > Quotes [+] [?] [📅] [🕒] [📊] [⌵]

---

**Creating New Quote**

Basic Information | More Information

Save | Cancel

Quote Information			
*Subject	<input type="text"/>	Potential Name	<input type="text"/> [📁] [📄]
Quote Stage	<input type="text" value="Created"/>	Valid Till	<input type="text" value="25-05-2006"/> [📅] <small>{dd-mm-yyyy}</small>
Team	<input type="text"/>	Contact Name	<input type="text"/> [📁] [📄]
Carrier	<input type="text" value="FedEx"/>	Shipping	<input type="text"/>
Inventory Manager	<input type="text" value="admin"/>	*Account Name	<input type="text"/> [📁]
Assigned To	<input checked="" type="radio"/> User <input type="radio"/> Group <input type="text" value="admin"/>		

Address Information			
* Billing Address	<input type="text"/>	* Shipping Address	<input type="text"/>
Billing Po Box	<input type="text"/>	Shipping Po Box	<input type="text"/>
Billing City	<input type="text"/>	Shipping City	<input type="text"/>
Billing State	<input type="text"/>	Shipping State	<input type="text"/>
Billing Code	<input type="text"/>	Shipping Code	<input type="text"/>
Billing Country	<input type="text"/>	Shipping Country	<input type="text"/>

..... snip snip .....

Figure 2.29. Quote - Edit View for quote and address information

You may enter the following information:

#### Quote information

Table 2.6. List of default master data entry fields for quotes

Subject:	You have to give the quote a name. It is practical to have the customers name mentioned, e.g. Sample Inc. - 1st Quote.
Potential Name:	You may select the name of a sales potential that refers to this quote.
Quote stage:	The CRM offers you to have the quote created with different stages. This is helpful, for instance, if someone else has to approve the quote.
Valid Till:	Enter the expiry date of this quote. This information will become a part of the PDF output.
Team:	This field has been added for your internal use. If you have a team working on this quote, you can note this here.
Contact Name:	You may select a contact name here.
Carrier:	If you have to send goods, you may select an carrier here.
Shipping:	You may add additional shipping information such as the approximately shipping date for internal use.
Inventory Manager:	If you use the CRM to maintain your inventory, you may select the inventory manager here. The inventory manager will receive an automatically generated e-mail by the CRM system that informs about this quote as soon you hit the <b>[Save]</b> button. Your system administrator may change the settings as described in <a href="#">section: Inventory Notifications</a> .
Account Name:	You have to refer your quote to an existing account. You select it here by clicking the <b>[folder icon]</b> . The CRM will get the address information from this account and will automatically fill in the corresponding fields at this entry page.
Assigned To:	Select the CRM user who is responsible for this quote.

## Address information

### Billing and Shipping Address:

You have to have billing and shipping addresses as part of your quote.

## Product Details

For quotes, the CRM system considers all type of taxes or discounts which may apply to the offer of products or services. These may include local, state or federal taxes as well as special taxes. These taxes can be calculated individually for each product or service, or calculated for the whole. Before you select products for your quote, you need to decide what tax mode applies to your offer. The CRM system supports an **Individual** and a **Group** tax mode.

The [figure: Product Details for Individual Tax Mode](#) displays an example for the entry details for products calculated with the **Individual** tax mode.



Product Details				Tax Mode <span style="border: 1px solid red; padding: 2px;">Individual ▼</span>		
Tools	Product Name	Qty In Stock	Qty	List Price	Total	Net Price
	<input type="text" value="Sample Product"/> for demo only  <input type="button" value="[Clear Comment]"/>		10	<input type="text" value="1000"/> (-) Discount : 0.00 <b>Total After Discount :</b> 10000.00 <span style="border: 1px solid red; padding: 2px;">(+) Tax : 1450</span>	10000.00 0.00 10000.00 1450.00	11450.00

**Figure 2.30. Product Details with Individual Tax Mode**

With this tax mode you may set different taxes for each individual product or service you offer.



In figure: [Product Details with Group Tax Mode](#) you see the entry details with the **Group** tax mode. Here the overall tax is calculated after all products or services has been entered.

Product Details				Tax Mode <span style="border: 1px solid red; padding: 2px;">Group</span>		
Tools	Product Name	Qty In Stock	Qty	List Price	Total	Net Price
	<input type="text" value="Sample Product"/>  for demo only <input type="text" value=""/> [Clear Comment]		10	<input type="text" value="1000"/>  (-) Discount : 0.00 <b>Total After Discount :</b> 10000.00	10000.00	10000.00

**Figure 2.31. Product Details with Group Tax Mode**

**Table 2.7. List of default product entry fields for quotes**

Product:	You must have created a product or service catalog before you can create a quote. Here you have to use the [ <b>magnifying glass icon</b> ] to select a product or service from the product catalogue. You may add an additional comment for each individual product you offer.
Qty In Stock:	After you have picked a product you will see here the quantity in stock. Negative numbers could mean that you run out of stock or that no stock has been setup. You can ignore this.
Qty:	You have to select a quantity of products or services you offer.
Unit Price:	After you have selected a product or service, the unit price as defined in the catalogue will be displayed here.
List Price:	Here you enter the customers price. Note that you can use the [ <b>book icon</b> ] to select the price from your price book entries. That is especially useful if you maintain various price lists for different types of customers.
Discount:	You may select a discount for each individual product or service or a discount for the whole. This discount may be in percent (%) of the list price or may have a fixed value.
Tax:	The CRM calculates your taxes on the basis of the tax information of your product catalogue. You may modify them for a quote without changing the product catalogue entry if required. Taxes that apply to your business are set by the CRM system administrator.
Shipping & Handling Charges:	You may add additional shipping charges if applicable.
Taxes For Shipping and Handling:	You may add additional shipping taxes if applicable.
Adjustment:	Finally you can make an adjustment to the quote by adding or deducting a fixed amount.

You may add further products or services by clicking the [**Add Product**] button.

Finally the CRM will add up all your entries and will calculate the Sub Total. You may add further taxes or adjustments. Note that the terms and conditions can be defined if you hit the [**More Information**] tab. Your CRM administrator may define default terms and conditions as described in [section: Inventory Terms & Conditions](#).

Click [**Save**] to transfer your quote to the CRM.



### Important

If you want to have a PDF copy of your quote, you must have set your company information in ad-

vance as described in [section: Company Details](#).

### 2.3.4. Sales Orders

Sales orders are orders you receive from customers. Such orders of goods or services are usually presented as a paper copy received by fax or mail. It makes sense to capture such orders also in the CRM. A sales order may differ from your quote and you should have such information available at the CRM system.

You may create a sales order from a previous quote by opening the detail view of the corresponding quote and clicking the **[New Sales Order]** button. This will automatically transfer your quote information to the new sales order. You may also create a new sales order by clicking the **plus icon** at the sales order list view.



#### Note

To enter sales orders in your CRM system, you must have the services or products ordered in your product catalogue and in your price book.

In both cases a new window will open as shown in [figure: Sales Order - Edit View for sales order and address information](#). If you have used a quote before, you will note that all entry fields have been filled automatically.

#### Creating New Sales Orders

Basic Information		More Information	
Save Cancel			
<b>Sales Order Information</b>			
*Subject	<input type="text"/>	Potential Name	<input type="text"/>
Customer No	<input type="text"/>	Quote Name	<input type="text"/>
Purchase Order	<input type="text"/>	Contact Name	<input type="text"/>
Due Date	2006-05-30 <small>(yyyy-mm-dd)</small>	Carrier	FedEx
Pending	<input type="text"/>	Status	Created
Sales Commission	<input type="text"/>	Excise Duty	<input type="text"/>
*Account Name	<input type="text"/>	Assigned To	<input checked="" type="radio"/> User <input type="radio"/> Group admin
<b>Address Information</b>			
* Billing Address	<input type="text"/>	* Shipping Address	<input type="text"/>
Billing Po Box	<input type="text"/>	Shipping Po Box	<input type="text"/>
Billing City	<input type="text"/>	Shipping City	<input type="text"/>
Billing State	<input type="text"/>	Shipping State	<input type="text"/>
Billing Code	<input type="text"/>	Shipping Code	<input type="text"/>
Billing Country	<input type="text"/>	Shipping Country	<input type="text"/>

----- snip snip -----

Figure 2.32. Sales Order - Edit View for sales order and address information



#### Note

At the current release, you will not be able to select your sales order number.

### Sales Order Information

**Table 2.8. List of default master data entry fields for sales orders**

Subject:	You have to give this sales order a name. It is advised to make it unique and to include the account name.
Potential Name:	You may select the sales potential related to this order.
Customer No.:	If your company works with customer numbers, you may place such a number here. You may get this number from your accounting team.
Quote Name:	You may link this order with a quote. Make your selection here.
Purchase Order:	Usually customers will send you an order with a purchase order number. You may enter it here.
Contact Name:	You may select a contact related to this order.
Due Date:	You may pick a due date for this order here.
Carrier:	You may select a carrier preferred by your customer if you ship goods.
Pending:	If this sales order is pending for any reason, you may note it here.
Status:	Select a status for this sales order. This a practical tool if orders must be approved.
Exercise Duty:	If there are any special taxes o other costs related to this order, you may enter them here.
Account Name:	You must select the account that is related to this sales order.
Sales Commission:	You may enter a sales commission here.
Assigned to:	Select the CRM user who is responsible for this Sales Order. You can select only single users, no groups.

### Address Information

As soon you pick an account name, the address information is taken from the account and included automatically. You may change it if necessary.

### Product Details

Here the ordered goods and services ordered are listed. Please refer to [Product Details in Quotes](#) for more information.



#### Note

Your system administrator may customize the entry fields.



#### Important

If you want to have a PDF copy of your order, you must have set your company information in advance as described in [section: Company Details](#).

### 2.3.5. Purchase Orders

The CRM supports you in purchasing goods or services. That might be helpful if you have to order something to fulfill a customer sales order or to maintain your company operation.



#### Note

Before you can enter any purchase orders, you must have the vendor in the vendors list. This is ex-

plained in [section: Vendors](#). You must have also the products or services to be purchased in your product catalogue as well in a price book.

To enter a new purchase order, click the **[plus icon]** at the **Inventory > Purchase Orders** menu. As another option, you may click the **[Add New Purchase Order]** button at the detail view of a vendor at the **Inventory > Vendors** menu. By using this option the CRM will transfer the vendor information to the new purchase order automatically. A new window will open as shown in [figure: Purchase Order - Edit View for purchase order and address information](#).

#### Creating New Purchase Orders

----- snip snip -----

**Figure 2.33. Purchase Order - Edit View for purchase order and address information**

Now you may enter the following information to your purchase order:



#### Note

At the current release, you will not be able to select your own purchase order number.

**Table 2.9. List of default master data entry fields for purchase orders**

Subject:	You have to give this sales order a name. It is advised to make it unique and to include the account name.
Vendor Name:	You have to select a vendor name already stored in your CRM system. This will automatically fill in the address information entry fields.
Requisition No:	You may use requisition numbers in your organisation. You may enter such number here.
Tracking Number:	You may enter your internal or your vendors tracking number here.
Contact Name:	You may select a contact related to this order. This may be related to your vendor or to a person who works with you on this purchase order.
Due Date:	You may enter a due date for this purchase order.
Carrier:	You may select your preferred carrier.
Sales Commission:	You may enter a sales commission that is included in your purchase order. This entry has a numeric value.

Exercise Duty:	You may enter tax information if applicable. Note that this has a numeric value.
Status:	If more than one person works with this order, you may use the status field to distinguish certain levels of completion.
Account Name:	You must select the account that is related to this sales order.
Sales Commission:	You may enter a sales commission here.
Assigned to:	Select the CRM user who is responsible for this Sales Order. You can select only individual users, no groups.



### Note

Your system administrator may customize the entry fields.

The meaning and the function of the other purchase order entry fields are identical to the fields in quotes as described in [section: Quotes](#).



### Important

If you want to have a PDF copy of your order, you must have set your company information in advance as described in [section: Company Details](#).

## 2.3.6. Invoices

You may use the CRM system to create customer invoices. Click the **[plus icon]** at the **Sales > Invoice** menu or, preferably, use the **[Create New Invoice]** button at the detail view of a sales order. A new window will open as shown in [figure: Invoice - Edit View for invoice and address information](#).

### Creating New Invoice

The screenshot shows the 'Creating New Invoice' form. It has two tabs: 'Basic Information' and 'More Information'. The 'Invoice Information' section contains the following fields:

- \*Subject: [Text Field]
- Invoice No: RE-07-1003 (highlighted with a red box)
- Contact Name: [Text Field]
- Due Date: 09-04-2007 (with a calendar icon)
- Excise Duty: [Text Field]
- \*Account Name: [Text Field]
- Assigned To: User (radio selected), Group (radio unselected), admin (dropdown)
- Sales Order: [Text Field]
- Customer No: [Text Field]
- Invoice Date: 09-04-2007 (with a calendar icon)
- Purchase Order: [Text Field]
- Sales Commission: [Text Field]
- Status: Created (dropdown)

The 'Address Information' section contains the following fields:

- \* Billing Address: [Text Field]
- \* Shipping Address: [Text Field]
- Billing Po Box: [Text Field]
- Shipping Po Box: [Text Field]
- Billing City: [Text Field]
- Shipping City: [Text Field]
- Billing State: [Text Field]
- Shipping State: [Text Field]
- Billing Code: [Text Field]
- Shipping Code: [Text Field]
- Billing Country: [Text Field]
- Shipping Country: [Text Field]

----- snip

snip -----

**Figure 2.34. Invoice - Edit View for invoice and address information**

You may add the following information to your invoice:

## Invoice Information

**Table 2.10. List of default master data entry fields for invoices**

Subject:	You have to give your invoice a name. It is advised to make the name unique and to include the customers name.
Sales Order:	You may select a sales order this invoice refers to.
Invoice No:	The system automatically proposes an invoice number every time you create a new invoice by adding 1 to the last existing invoice number. You may define your own standard numbering format for your company as explained in <a href="#">section: Invoice Number Customization</a> .
Customer No:	You may use customer numbers in your organisation. Ask you accounting department. You may enter such number here.
Invoice Date:	Every invoice must have a date. You may pick it here.
Due Date:	You should enter a due date for this invoice.
Purchase Order:	You may enter information on a purchase order that refers to this invoice.
Sales Commission:	You may enter a sales commission which is included in your purchase order. This entry has a numeric value.
Exercise Duty:	You may enter tax information if applicable. Note that this has a numeric value.
Sales Commission:	You may enter a sales commission that is included in your invoice. This is a numeric value.
Account Name:	You must select an account related to this invoice. Note that by selecting the account the address fields are filled out automatically.
Status:	If more than one person works with this invoice, you may use the status field to distinguish certain levels of completion.
Assigned to:	Select the CRM user who is responsible for this Sales Order. You can select only single users, no groups.



### Note

Your system administrator may customize the entry fields.

The meaning and the function of the other invoice entry fields are identical to the fields in quotes as described in [section: Quotes](#).



### Important

If you want to have a PDF copy of your invoice, you must have set your company information in advance as described in [section: Company Details](#).

You may send the PDF copy of invoices as an e-mail to customers directly from the invoice detail view as displayed in [figure: PDF output for invoices](#). If you click **Send Email With PDF** the mail edit window will open which contains the invoice as an attachment allows you to add the receiver and additional text to the e-mail.

**[ 155 ] AB070111 - Invoice Information**  
 Updated today (09 Oct 2007)

**Invoice Information**

[Edit](#)
[Duplicate](#)
[Delete](#)

Invoice Information			
Subject	AB070111	Sales Order	AB070111
Customer No		Invoice No	RE-2007-1012
Contact Name		Invoice Date	09-10-2007
Due Date	08-10-2007	Purchase Order	
Excise Duty		Sales Commission	
Account Name	Dreger	Status	Approved
Assigned To User	admin	Created Time	09-10-2007 10:37:22
Modified Time	09-10-2007 10:37:22		

**Tools**

[Export To PDF](#)  
[Send Email With PDF](#)

use this link to email a PDF copy of the invoice  
 use this link to generate an invoice in the PDF format

--- snip

Figure 2.35. PDF output for invoices

## 2.4. Marketing

The CRM supports your marketing efforts with a **Campaign** module. Click the **[Marketing]** menu to open the list view of your marketing campaigns as shown in [figure: Campaigns - List View](#).

**Marketing > Campaigns**

[Delete](#)
[Change Owner](#)
Showing 1 - 6 of 6

[Filters: All](#)
[New](#)
[Edit](#)
[Delete](#)

<input type="checkbox"/>	Campaign Name	Campaign Type	Campaign Status	Expected Revenue	Expected Close Date	Assigned To
<input type="checkbox"/>	User Conference	Conference	Planned	250000	02-01-2003	Marketing Team

[Delete](#)
[Change Owner](#)
Showing 1 - 1 of 1

Figure 2.36. Campaigns - List View

You may add a new campaign by clicking the **[plus icon]** on top of the list. The edit view is shown in [figure: Campaign - Edit View](#).

## Creating New Campaign

Basic Information

**Campaign Information**

*Campaign Name	<input type="text"/>	Campaign Type	<input type="text" value="-None-"/>
Product	<input type="text"/>	Campaign Status	<input type="text" value="-None-"/>
Expected Close Date	<input type="text" value="26-05-2006"/> <small>(dd-mm-yyyy)</small>	Expected Revenue	<input type="text"/>
Budget Cost	<input type="text"/>	Actual Cost	<input type="text"/>
Expected Response	<input type="text" value="-None-"/>	Assigned To	<input checked="" type="radio"/> User <input type="radio"/> Group <input type="text" value="admin"/>
Num Sent	<input type="text"/>	Sponsor	<input type="text"/>
Target Audience	<input type="text"/>	Target Size	<input type="text"/>
Expected Sales Count	<input type="text"/>	Actual Sales Count	<input type="text"/>
Expected Response Count	<input type="text"/>	Actual Response Count	<input type="text"/>
Expected ROI	<input type="text"/>	Actual ROI	<input type="text"/>

**Description Information**

Description	<input style="width: 80%;" type="text"/>
-------------	--

Figure 2.37. Campaign - Edit View

You are offered to include the following basic information:

Table 2.11. List of default master data entry fields for campaigns

Campaign Name:	You have to give your campaign a short and unique name.
Campaign Type:	You may select a campaign type. The CRM comes with a set of pre-defined types that may be changed by your CRM system administrator.
Product:	You may select a product from your existing product catalogue.
Campaign Status:	You should select a status of your campaign. The list that comes with the CRM can be changed by the CRM system administrator.
Expected Close Date:	You may include the finishing date of the campaign.
Expected Revenue:	You may enter an amount of revenue that you expect from the campaign.
Budget and Actual Cost:	You may include the costs for your campaign.
Expected Response:	You may include the level of responses you expect from your campaign.
Assigned To:	You have to assign the campaign to a user or a group.
Num Sent:	If you are carrying out a mailing campaign, you may include the number of mailings you are going to send.
Sponsor:	If you have a sponsor for your campaign, you may note it here.
Target Audience and Target Size:	You may define your target audience.
Expected and Actual Sales Count:	If you can measure the success of your campaign by a number of sales, you may note this here.
Expected and Actual Response Count:	If you expect customer responses, you may note it here.
Expected and Actual ROI:	If you expect a return of investment, you may note it here.
Description:	You may add further information to the campaign.



Click [**Save**] to transfer your campaign data to the CRM.

To work with a campaign, open it by clicking the name at the list view. The master data you just entered, are displayed immediately. Click the [**More Information**] tab to add contacts and leads to your campaign as shown in [figure: Campaign - Detail View](#).

**Figure 2.38. Campaign - Detail View More Information**

You may add individual contacts, leads, potentials or activities to your campaign. Or, you may load existing contact lists or lead lists to your campaign by making the proper selection. These lists must already exist as customized list view in your lead or contact modules. For a detailed example please have a look at the [Appendix: Administration FAQ](#). You may send a mass mailing to selected contacts by pushing the [Send Email] Button.



### Note

The marketing module will be developed further with the next CRM releases.

## 2.5. Product Related Entries

The CRM uses the term **product** as a comprehensive term for all kinds of goods or services your company offers. Similar to a catalogue, the CRM provides functions to capture and to categorize your products with various prices and vendors. This information can be actively used in the work with customers.

### 2.5.1. Products

The CRM allows you to link product information with your sales process. To enter a new product, click the **plus icon** at the **Inventory > Products** menu for the full set of options. A new window will open as shown in [figure: New Product - Edit View Master Data](#).

**Inventory > Products** Import Products | Export Products

**Creating New Product**

**Basic Information** **More Information**

Save Cancel

**Product Information**

*Product Name	<input type="text"/>	Product Code	<input type="text"/>
Product Active	<input type="checkbox"/>	Product Category	--None--
Sales Start Date	25-05-2006 <small>(dd-mm-yyyy)</small>	Sales End Date	25-05-2006 <small>(dd-mm-yyyy)</small>
Support Start Date	25-05-2006 <small>(dd-mm-yyyy)</small>	Support Expiry Date	25-05-2006 <small>(dd-mm-yyyy)</small>
Leads	<input type="text"/>	Contact Name	<input type="text"/>
Website	http:// <input type="text"/>	Vendor Name	<input type="text"/>
Part No	<input type="text"/>	Vendor Part No	<input type="text"/>
Serial No	<input type="text"/>	Product Sheet	<input type="text"/>
GL Account	300-Sales-Software		

**Pricing Information:**

Unit Price: (€)	<input type="text"/>	Commission Rate (%)	<input type="text"/>
VAT (%)	<input checked="" type="checkbox"/> 8.500		

**Description Information**

Description	<input style="width: 100%; height: 20px;" type="text"/>
-------------	---

Save Cancel

**Figure 2.39. New Product - Edit View Master Data**

You may enter the following product or service information.

### Product Information

**Table 2.12. List of default master data entry fields for product information**

Product Name:	You have to give each service or product an unique name.
Product Code:	You should give each product an unique order code. This could be a combination of letters and numbers. Customers should use this code with their orders.
Product:	You may select a product from your existing product catalogue.
Active:	By marking this check box, a product becomes active and is available for purchase.
Product Category:	Here you may select a category for your product. Note that your CRM administrator can modify the selection list.
Sales Start/End Date:	You may select a time frame in which your company sells this product.
Support Start/Expiry Date:	You may select a time frame in which this product is maintained.
Leads/Accounts/Potentials:	You may refer this product with a special lead, account or potential. Note that you cannot enter a reference directly. You have to pick a reference from existing CRM data.
Contact Name:	You may pick a referencing contact. That could be, for instance, a person which you can contact for further product information.
Website:	You may enter a website with more product information.
Vendor Name:	If you sell third party products, you may select a vendor here.
Part No:	If each of your products have their own part numbers, you may enter it here.
Vendor Part No:	If you vendor has provided you with a part number for ordering the

	product, you may enter it here.
Serial No:	If each of your products have a special serial number, you may enter it here.
Product Sheet:	You may enter a name of a product data sheet that is available from other resources.
GL Account:	This entry refers to a General Ledger Account and could be useful if you were importing/exporting items from your accounting program. Each account in your General Ledger usually has a number for reference.

## Pricing Information

**Table 2.13. List of default master data entry fields for product pricing information**

Unit Price:	You should enter a price per unit. This price may be the list price you pay when you purchase this product from a third party. Note that the selling price can be different as defined in your price lists (see <a href="#">section: PriceBooks</a> ).
Commission Rate:	You may enter your commission in %.
Tax Class:	You may enter a tax in % that applies to a product. Note that your CRM administrator configures the tax types and rates as explained in <a href="#">section: Tax Calculations</a> . Only tax types defined by the administrator will be displayed. You may change the tax amount but not the tax type if necessary.

## Stock Information

The CRM supports you in maintaining a stock of goods. You may specify stock information and assign someone responsible for maintaining the stock.

**Table 2.14. List of default master data entry fields for product stock information**

Usage Unit:	You may enter the type of units of goods in your stock. Note that this list can be modified by your CRM administrator.
Qty/Unit:	You may enter a number of goods per unit (e.g. 15 pieces of goods in each unit).
Qty in Stock:	You may enter the quantity in stock. This information is used by the CRM when making quotes, orders or invoices. Whenever you make a quote etc. the quantity in stock is displayed and reduced automatically if you sell a product.
Handler:	You should assign a responsible person for maintaining the stock. This person will automatically be informed by the CRM system if goods are sold.
Reorder Level:	Here you may enter the minimum quantity of goods you want to keep in stock. If the CRM system detects that during the sales process the actual quantity in stock gets close to the minimum amount, the person in charge of the stock will be notified by e-mail.
Qty. in Demand:	Here you may note the quantity of goods you usually buy.

## Product Image Information:

You may add up to 6 product images to your product. The image must be in .jpg, .gif or .png format.



## Warning

Do **not** use file extensions with capital letters (JPG, GIF, PNG).

You should keep the image size as small as possible to avoid time consuming downloads every time you display this CRM page. If you add more than one image, your images will be displayed as rotating cube as shown in the next figure:



Figure 2.40. Display of multiple images for products

## Description Information

Here you have a space for further product information if required.

Click [**Save**] to transfer your product information to the CRM system. After saving, the detail view of your product opens. You will see the master data you have just entered.

[ 65 ] sample product - Product More Information  
Updated today (28 Jun 2007)

Product Information	More Information
<b>Trouble Tickets</b>	<a href="#">Add Ticket</a>
<i>None Included</i>	
<b>Attachments</b>	<a href="#">Add Note</a> <a href="#">Add Attachment</a>
<i>None Included</i>	
<b>Quotes</b>	<a href="#">Add Quote</a>
<i>None Included</i>	
<b>Purchase Order</b>	<a href="#">Add PurchaseOrder</a>
<i>None Included</i>	
<b>Sales Order</b>	<a href="#">Add SalesOrder</a>
<i>None Included</i>	
<b>Invoices</b>	<a href="#">Add Invoice</a>
<i>None Included</i>	
<b>Price Books</b>	<a href="#">Add to Price Books</a>
<i>None Included</i>	
<b>Leads</b>	<a href="#">Select Leads</a>
<i>None Included</i>	
<b>Accounts</b>	<a href="#">Select Account</a>
<i>None Included</i>	
<b>Contacts</b>	<a href="#">Select Contacts</a>
<i>None Included</i>	
<b>Potentials</b>	<a href="#">Select Potential</a>
<i>None Included</i>	

Figure 2.41. Product - Edit View More Information

If you click the **[More Information]** tab have the possibility to enter additional information or to work with the product as displayed in [figure: Product - Edit View More Information](#).

**Table 2.15. List of default master data entry fields for more information to products**

Trouble Tickets:	Here you will find all product related tickets. These tickets may be based on customer complains, product bugs, or other customer related after-sales events. You may find further information about tickets at <a href="#">section: Trouble Tickets</a> .
Attachments and Notes:	Here you may add attachments or notes to a product. That can be data sheets, additional product images or others.
Quotes:	The CRM lists all quotes which contain this product. You may also create a new quote here.
Purchase Orders:	The CRM lists all purchase orders which contain this product. You may also create a new order here.
Sales Orders:	The CRM lists all sales orders which contain this product. You may also create a new order here.
Invoice:	The CRM lists all invoices which contain this product. You may also create a new invoice here.
Price Books:	The CRM lists all price books which contain this product. You may also create a new price book here.
Leads:	The CRM lists all leads which contain this product. You cannot create a lead here.
Accounts:	The CRM lists all accounts which contain this product.
Contacts:	The CRM lists all contacts which contain this product.
Potentials:	The CRM lists all potential which contain this product.

### 2.5.2. PriceBooks

The CRM allows you to work with an unlimited number of different price lists, called price books. This is very helpful, for instance, if your company has different customer types which require a different pricing. You may use special retail, distribution, end customer price lists or others.

#### Create Price Books

To create a new price book, click the **[plus icon]** at the **Inventory > PriceBooks** menu. A new window will open as shown in [figure: New Price Book - Edit View](#).

**Inventory > PriceBooks**

**Creating New PriceBook**

**Basic Information**

**Price Book Information:**

\*Price Book Name  Active

**Description Name:**

Description

**Figure 2.42. New Price Book - Edit View**

You have to give this Price Book an unique name. You may add a description for future reference. Mark the check box [**Active**] if you want to have this price book available for quotes, orders and invoices.

Click [**Save**] to create this new Price Book at your CRM system. The detail view of this new price book opens as displayed in [figure: Pricebook - Detail View](#).

**[ 264 ] sample pricebook - PriceBook Information**

Updated today (25 May 2006)

**PriceBook Information** More Information

**Price Book Information:**

Price Book Name	sample pricebook	Active	yes
Created Time	25-05-2006 06:29:03	Modified Time	25-05-2006 06:29:03

**Description Name:**

Description for demonstration purpose only

**Figure 2.43. Pricebook - Detail View**

## Edit Pricebooks

To add a product to your pricebook, click the **More Information** tab displayed at [figure: Pricebook - Detail View](#). You may add a product or service to your price book by clicking the [**Select Product**] button.

The new window which opens as shown in [figure: Price Book - Product Selection List](#), lists all the products stored in the CRM. You may pick the products you want to add to this price book by selecting the corresponding check box. You should also set a list price for the product. The entered list price is only valid for this price book. The unit price as set in the product catalogue is shown as a reference. Click [**Add To Price-Book**] to save your selections.



### Important

Only activated products are available for selection. If you do not see a product in the selection list, you may check the product status by opening the detail view of this product.

<input type="button" value="Add To PriceBook"/> <input type="button" value="Cancel"/>				
<input type="checkbox"/>	Product Name	Product Code	Unit Price	List Price
<input checked="" type="checkbox"/>	Sample Product	0815	100.00	<input type="text" value="120.00"/>
<input checked="" type="checkbox"/>	Sample Service	1934	200.00	<input type="text" value="210.00"/>

Figure 2.44. Price Book - Product Selection List

### 2.5.3. Vendors

The CRM allows you to enter an unlimited number of vendors which provide goods or services to your company or to your customers. Such vendors are stored separately and not part of the contacts or accounts lists.

To enter a new vendor click the **[plus icon]** at the **Inventory > Vendors** menu. A new window as shown in [figure: New Vendor - Edit View](#) will open.

**Inventory > Vendors**

**Creating New Vendor**

**Basic Information** | **More Information**

**Vendor Information:**

*Vendor Name	<input type="text"/>	Phone	<input type="text"/>
Email	<input type="text"/>	Website	http:// <input type="text"/>
GL Account	<input type="text" value="307-Service-Hardware Labor"/>	Category	<input type="text"/>

Figure 2.45. New Vendor - Edit View

You may add the following basic information:

Table 2.16. List of default master data entry fields for vendor information

Vendor Name:	You should use the vendors corporate name for any name entry.
Phone:	You may enter the phone number of your vendor.
e-mail:	You may enter the e-mail address of your vendor contact.
Website:	You may enter the vendors website.
GL Account:	This entry refers to a General Ledger Account. Each vendor in your General Ledger usually has a number for a reference.
Category:	You may enter a category if required.

After clicking the **[More Information]** tab, you may complete the vendor information by adding the mailing address and a description.



**Note**

You CRM system administrator may customize the vendor master data sheet.

Click [**Save**] to transfer your vendor information to the CRM. You may view, browse and search your entire vendor list at the **Inventory > Vendors** menu.

## 2.5.4. Product Import and Export

By the export and import functions you can exchange data between the CRM software and a large number of programs on your computer. All product data can be exported or imported.

For starting to import or export, click the **Inventory > Products** menu at the navigation area of your CRM system. The list view of your products will then be shown. Use the icons on top of the list to start the import or export.



### Note

The icons are only functional if you have the permission to use them. These privileges are set by your CRM system administrator.

Please refer to [section: Export and Import of Leads, Contacts, Accounts and Vendors](#) for further export and import instructions. Use the description of the import procedure accordingly for contacts. You can find sample import data in [section: Data Format for Imports](#). Use the data format described in this section accordingly for your product files.



## Chapter 3. Working with the CRM System

This chapter explains how to work efficiently with the CRM system. It includes hints for the usage within the sales process from leads to after-sales services.

### 3.1. General Remarks

#### 3.1.1. Working with Lists

If you click appropriate menus at the navigation area, you will see a list of all data stored at the CRM system. In the course of the time these lists can become very large and difficult to handle. Furthermore, due to the limited screen size, only a few columns can be displayed.

Therefore, it is appropriate and usually also necessary to adapt the list views to the respective needs of the users. Generally, each user can create individual lists. These are then also available to other users.

The CRM system gives you various possibilities for arranging the lists according to your needs. Thus you have a very effective tool for managing larger data sets, getting informed automatically on changes or to selecting data for further use. You are allowed to create an unlimited number of individual list views.

#### Customize Lists

Using the account list as an example, I will explain how to arrange an individual view. This view can then be transferred to all other lists in a general manner.

In principle you can set the following parameters:

1. the content of the columns (what will be displayed),
2. the time interval in which data have been created or changed,
3. various logical AND and OR operations between data stored in the CRM system.

To create a new list view for accounts click [New] as shown in [figure: Access the Create List View](#).

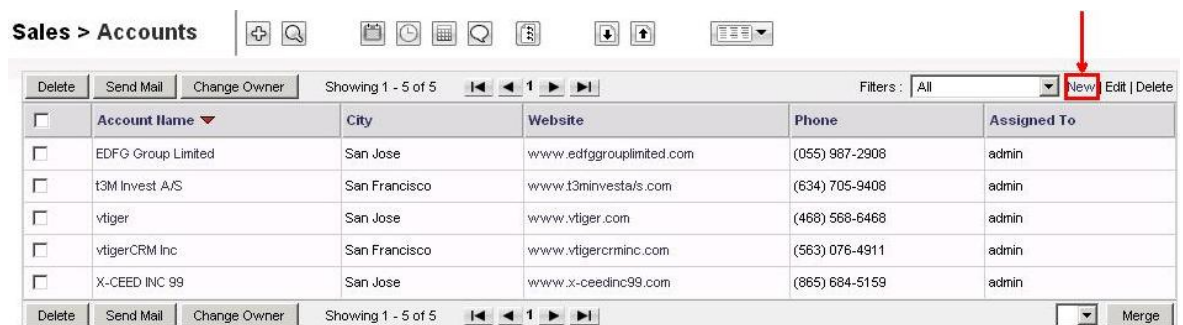


Figure 3.1. Access the Create List View

The new window that opens, as shown in [figure: Create Custom List - Edit View](#), will give you the opportunity to create your own list view.



## Tip

Individual lists make working with the CRM system much easier. However, mistakes in the list composition, especially by AND and OR operations, can lead to unexpected results. Therefore, unexperienced users should begin with simple lists and simple logical filters, and should examine the results carefully.

### Accounts > New Custom view

**Figure 3.2. Create Custom List - Edit View**

The following approach is recommended:

1. Enter a short but unique name for your list.
2. Select the content of the columns. Keep in mind that the more columns you select the more space on your screen is required.
3. Set a time filter if required. Set logical AND or OR operations for further filtering your data with the advanced filter operation.



## Note

You may include check boxes in your advanced filter options. If you want to check whether a check box is marked, use the terms "yes" or "1" for comparison. If you want to have a list of entries with unmarked check boxes use "no" or "0" for comparison.

You can change the default list view by selecting the [**Set as Default**] check box. You can also select the created list view to be present at the Key Metrics, located at Home, by marking the [**List in Metrics**] check box. The functions of the Key Metrics are explained in the following section. When finished, click [**Save**] to transfer you new list view to the CRM system.

## Key Metrics

The Key Metrics is located at your Home page. It can offer you a comprehensive view of the most important data stored within your CRM system. This is done by providing a quantitative summary of the information selected by your criteria.

The content of the Key Metrics is defined by your custom list views. For an introduction in custom list views, you may look at [section: Customize Lists](#). If the check box **List in Metrics** is marked within a list, the CRM will consider this list as part of the Key Metrics. As a result the CRM automatically calculates the data displayed at the Key Metrics.

You may use the Key Metrics to answer questions such as:

- How many quotes are sent to prospect customers?
- How many tickets of a special customer are open?
- How many sales potentials are in the last stage?

You may have other questions or you may find your own criteria. The possibilities for listings at the Key Metrics are only limited by the CRM's capabilities of creating list views.

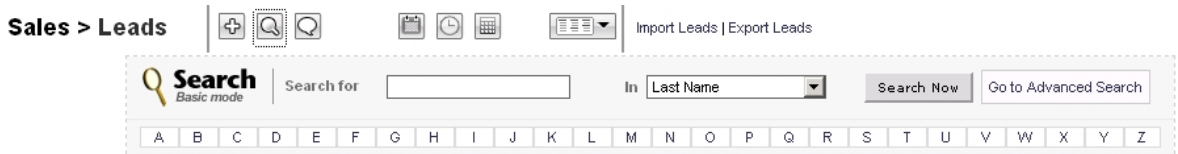


**Tip**

You may use the Key Metrics for critical processes, in order to recognize immediately whether something has changed. For instance, a sales person can immediately see if the service team has to solve critical tasks with a special customer; a manager can watch the progress in a sales cycle; a service coworker can see, whether the company has won new customers etc.

**List Search**

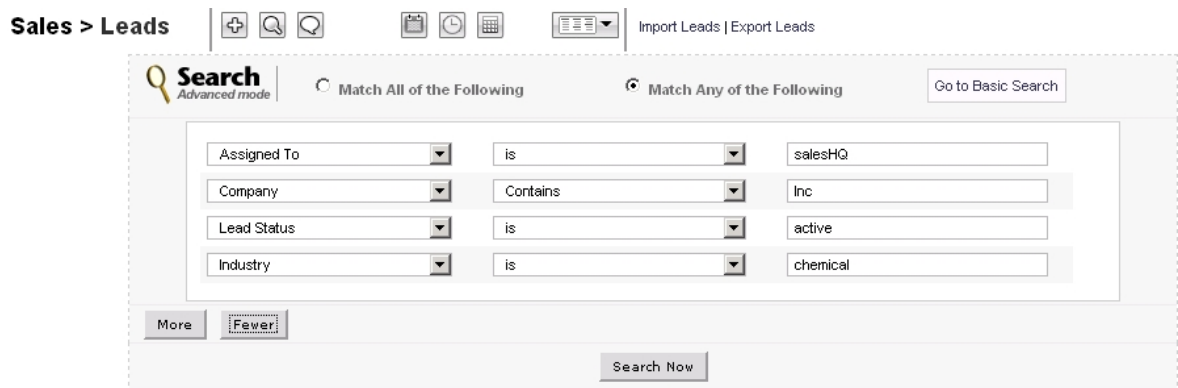
If you have many entries in your list views of leads, contacts, accounts etc., a search function helps you to find a specific entry fast. Click the **magnifying glass icon** in the list view to open the search display, as shown in [figure: Basic Search at List View](#) for leads.



**Figure 3.3. Basic Search at List View**

The basic search function searches for entries related to first name, last name, company name, phone, website, e-mail address, and owner of the data. In addition, you may search by the alphabetical order.

If you click [**Goto Advanced Search**], a new search window will open that allows you a more detailed search based on logical combinations, as shown in [figure: Advanced Search at List View](#).



**Figure 3.4. Advanced Search at List View**

You may add as many search criteria you need. You may switch between the basic and the advanced search at any time. Click the **[Search]** button to start your search.

### 3.1.2. Tag Cloud

Tag Clouds are designed to improve the usability of the CRM. They help you categorize CRM entries based on an user's judgment or rating, independent from categories set by the CRM system. Tag Clouds are based on the assumption that humans tend to pool objects based on subjective or other values. Such a pooling is in fact a new categorization of data stored at the CRM system.

To meet such a requirement for categorization, the Tag Clouds provide users the capability to build categories which are not limited to a single CRM module. These categories are independent from the categories defined at the master data of each CRM entry, usually the pick list entries. For instance, a sales person may consider a meeting, a customer and a service request as **important**.

These new categories or groups can be defined freely. You may use any terms such as **important**, **Proposal**, **Berlin**, **private** or **Spring**. You may add such a term with the **Tag it** function at the Tag Clouds to any CRM entry that can be considered to be in the same term category. A tag cloud entry is shown in [figure: Tag Cloud](#).



#### Important

Tags are always single words! Do not use sentences or combined expressions.



**Figure 3.5. Tag Cloud**

Use the term listed in the Tag Cloud to find all CRM entries which have the same tag. On the Home page, all the tags will be displayed. Tags for a corresponding entity will only be displayed in the detail view. On clicking the tag, in both the detail view and the Home page, the entities tagged with the corresponding tag will be displayed. You can delete the tag from the detail view tag cloud. You can also delete a tag by deleting the entity.



#### Tip

The more CRM entries are labelled with the same tag, the bigger this tag will be displayed in the tag cloud.

To delete a tag, move your mouse pointer above the tag word. An "x" icon will appear. Click this icon to delete the tag. Alternatively you can delete your data entry. With this entry the tag will also be deleted.

Tag cloud entries are assigned to the user who made such entry. You can not share tag cloud entries with other users.

If a user does not intend to use the tag cloud this function can be switched off as explained in [section: My Preferences](#).

### 3.1.3. Chat Functions

The chat functions offered by the CRM system provide instant messaging capabilities in a form of real-time communication between two or more CRM users based on typed text.

The CRM system offers public as well as a private chat capabilities in so-called chat rooms. The public chat allows all CRM users to share a common chat room where each user can read all messages and can contribute if desired. The private chat room serves as a platform for the communications between two users.

To open a chat room click, in the **[Chat Icon]**, which is available at every list view. A new browser window will open, as illustrated in [figure: Chat View](#).



**Figure 3.6. Chat View**

To contribute to the chat, enter your message and click **[Send]**. Your message will be displayed at the chat room. Besides the chat room, you see the list of logged-in users. To open a private chat, click the appropriate user name. A private chat room will then open.

### 3.1.4. Tools Menu

The CRM offers a set of additional tools which are useful for the daily work with customers.

#### RSS

RSS is a Web feed format, used for Web syndication and stands for Really Simple Syndication. Web feeds are widely used by the weblog community for sharing the latest entries headlines or their full text, and even attach multimedia files. Some providers allow other websites to incorporate their syndicated headline or headline-and-short-summary feeds.

RSS is used for many purposes, including marketing, bug-reports, or any other activity involving periodic updates or publications. Many corporations are turning to RSS for delivering their news, replacing e-mail and fax distribution. The news media is also utilizing RSS by bypassing traditional news sources.

CRM users are able to have news constantly fed to them instead of searching for them. In the **Tools > RSS** menu the CRM system provides an RSS reader - which can check a list of feeds on behalf of the users and displays any updated articles that it finds. You may search the Web for RSS feeds you are interested in. Every RSS feed has a unique address similar to Web URLs. To watch an RSS feed, you have to enter these addresses into the CRM system.

## My Sites

You may link the CRM system with other web sites which are of any interests for your business. Users do not need to leave the CRM system to access third party web sites or other Intranet or Internet sites. You may use this function, for instance, for watching important customers, your own web site, or the websites of your competitors. It is also very useful for tracking shipments, or conducting web based communication with vendors.

Before you can see any website at the **Tools > My Site** menu, you need to bookmark a site. Click [ **Manage Sites** ] to enter a new web site. Click the [ **My Sites** ] to see the bookmarked web sites.

## Notes

Notes are a practical tool to add further information to Contacts, Accounts, Leads, Potentials, Products, Invoices, as well as Sales and Purchase Orders. You may enter a note by using the **Quick-Menu** or the **Plus Icon** at the list view of the **Tools > Notes** menu. You may also add notes directly at the detail views of certain CRM modules. As displayed in [figure: Note - Edit View](#) you may also attach files to notes.

**Figure 3.7. Note - Edit View**

You may use this function, for instance, to collect documents important to your companies operation.

### 3.1.5. Send and Receive E-mails

The CRM system offers a variety of methods for including e-mails in your work with your customers, co-workers, suppliers and other contacts. You may

**send e-mails to contacts directly from the CRM system:**

These functions are explained in [section: Sending Emails](#) and [section: Email Mass Mailing](#).

**transfer received or sent e-mails from your office environment to the CRM system:**

The CRM comes with an Outlook plugin as well as a Thunderbird/Mozilla e-mail client extension. You may use these additional programs on your computer. Please refer to [section: Synchronizing CRM with Office Environment](#) for more information.

**receive e-mails at the CRM system from personal mail accounts:**

The functions offered to receive e-mails are explained in [section: Receiving Emails](#).

For outgoing e-mails you have to configure a common mail server access as explained in [section: Outgoing Server](#). You will also need to configure the access to the individual receiving mail servers for each individual user as explained in [section: Receiving Emails](#).

## Sending E-mails

If you want to use the CRM system for outgoing e-mails you have three options:

1. You may create an e-mail from the detail view of one of your leads, contacts or accounts. By using the contact details already stored at your CRM system, the system makes sure that the sent e-mails will be stored in reference to the existing contact entries. You may see such e-mails at the contacts detail view as shown in [figure: Email listing at Contact Detail View](#).

[ 16 ] Elizabeth Brown - Contact More Information  
Updated today (28 May 2006)

Contact Information				More Information			
<b>Potentials</b>				Add new Potential			
None included							
<b>Activities</b>				Add new Task   Add new Event			
None included							
<b>Emails</b>				Add new Email			
				Showing 1 - 1 of 1			
Subject	Related To	Date Sent	Assigned To				
Sample email - for demo only	Brown Elizabeth	2006-05-28	John Silver				

Figure 3.8. e-mail listing at Contact Detail View

You can select the receiving parties at the list view as exemplary shown in [figure: Mass Mailing Selection](#) or you may select your receivers at the **Compose Email** menu as exemplary presented in [figure: Compose an Email](#).

2. You may select the receiving parties at the list view as shown in [figure: Mass Mailing Selection](#).
3. You may create an e-mail directly at the **Emails** menu. In this case the reference to a contact has to be made manually. An example is shown in [figure: Compose an Email](#).

**Compose E-Mail**

To: John Brown <jbrown@company.com> Contacts

Cc: Mary Smith <m.smith@sampleinc.com>

Bcc:

\*Subject:

Attachment:

**B** *I* U               

Format  Font  Size

You may enter any additional email address.                      You have to select the receiver from your existing contacts, accounts etc.


Figure 3.9. Compose an e-mail

**Important**

To be able to send an e-mail, the CRM system needs to access your outgoing e-mail server. The setup of the server connectivity is explained in [section: Outgoing Server](#).

At the composing menu you may use the entry fields based on the following description:

**Table 3.1. List of common entry fields for outgoing e-mails**


To:	Here you may enter the e-mail addresses of the recipients.
CC:	CC stands for Carbon Copy. The recipient entered here will receive a copy of the sent mail.
BCC:	BCC stands for Blind Carbon Copy. This means the same as CC, however the recipients entered here will be invisible for the other e-mail recipients.
Subject:	You should enter a subject for this e-mail.
Attachment:	You may add an attachment to your e-mail.   <b>Note</b> At the current release the maximum size of an attachment is limited to a file size of about 1 Mb.
Description:	You may enter your e-mail message here. Note that the e-mail will be sent as an HTML mail by default. You can use the design tools to enhance the layout of the e-mail.

**Tip**

The CRM system can store your standard e-mail signature and add it to your message automatically. The signature is set by the **My Settings** menu at the CRM's Login Area. You may also find further explanations at the [section: Users Configuration](#).

Beneath the description field, the buttons serve the following purposes:

**Table 3.2. List of supporting buttons for outgoing e-mails**

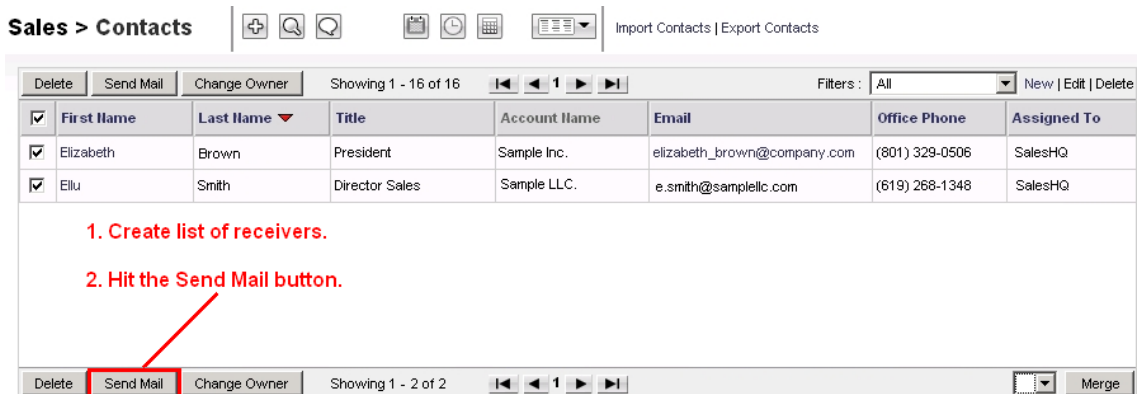
Select Email Template:	The CRM offers you to work with e-mail templates. These templates must be designed and stored at the CRM system as explained in <a href="#">section: E-mail Templates</a> .
Send:	The e-mail will be send. A signature will be added automatically if defined before.   <b>Note</b> The e-mails will be assigned to the sending user. A copy of the e-mail will be automatically send by the CRM system to the assigned user.
Save:	You may save this e-mail without sending it. The e-mail will be stored and get listed when you click the <b>My Home Page &gt; Emails</b> menu.
Cancel:	You may cancel the e-mail operation. All changes will be lost.



## E-Mail Mass Mailing

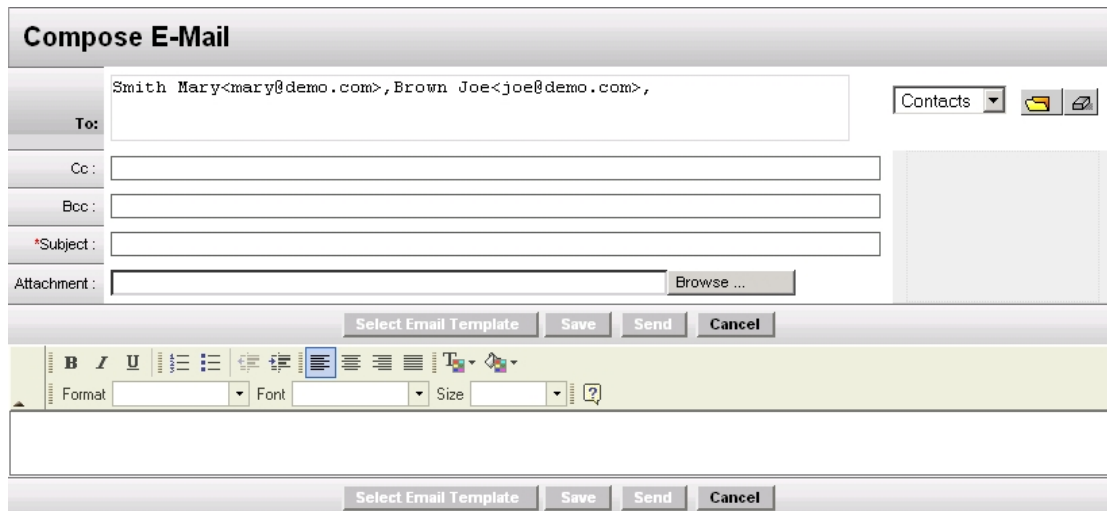
You can send a common e-mail from the CRM to several persons at the same time. You may use this function for mass mailings to your customers or to other contacts stored in your CRM system. For mass mailing it is recommended to create a mail from the list view.

- Create a custom view of your leads, contacts, or accounts. Use the filter operations to select the desired contacts. You may refer to [section: Customize Lists](#).
- Save the custom view.
- Display the custom view. Select the contacts which are to receive your mass mailing. Click the **[Send Mail]** button at the bottom of the list as shown in [figure: Mass Mailing Selection](#).



**Figure 3.10. Mass Mailing Selection**

The e-mail creation window will open as shown in [figure: Create Mass Mailing E-Mail](#).



**Figure 3.11. Create Mass Mailing E-Mail**

Edit your e-mail. You may also add further e-mail addresses which you have not selected before.

- Click the **[Send]** button to send your e-mail immediately, or the **[Save]** button, to store the e-mail at the CRM system without sending it. With the **Select Email Template** button you

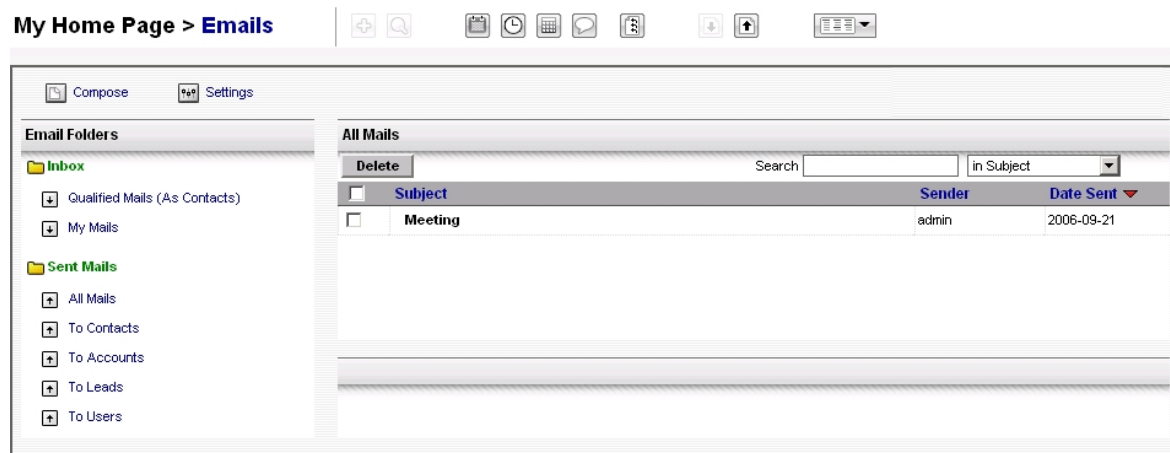
A reference to a copy of the sent e-mail, will be stored at each individual contact and is displayed in the detail view.

## Receiving E-mails

If you generally receive your e-mails at your office, you may use the Outlook Plugin or the Thunderbird extension to transfer selected e-mails to the contacts stored at your CRM system. Please refer to [section: Synchronizing CRM with Office Environment](#) for further descriptions.

In addition, you have the possibility to receive e-mails directly at the CRM. Before you can receive any e-mail at your CRM, you must have setup the access to your receiving e-mail server. The necessary precondition for this, the user must have an entrance to an e-mail server outside of the CRM system.

To configure the access to the receiving mail server click [**My Home Page > Webmail**] menu at the navigation area. You do not need administrative privileges for this operation. The e-mail client menu opens, as shown at [figure: Webmail Menu](#).



**Figure 3.12. Emails Menu**

Click the [**Settings Icon**] to open the e-mail server configuration menu as shown in [figure: Incoming Mail Server Details](#).

**My Incoming Mail Server Details**

---

**My Incoming Mail Server Details**

**Email ID**

Display Name  (example : John Fenner)

\* Email  (example : johnfenner@xyz.com)

**Mail Server Settings**

\*Mail Server Name or IP

\*User Name

\*Password

Mail Protocol  POP \*\*  IMAP \*\*  IMAP2  IMAP4

SSL Options  No TLS  TLS

Certificate Validations  Validate SSL Cert  Do Not Validate SSL Cert

Use Internal Mailer?  Yes  No

Refresh Timeout

Emails per Page

Items marked with \* are required  
Items marked with \*\* are not fully supported

**Figure 3.13. Incoming Mail Server Details**

You have to enter all configuration data as described in the following table. Please ask your e-mail service provider for the necessary access information.

**Table 3.3. List of settings entry fields for incoming e-mails**

e-mail ID - Display Name:	You should give each mail server an unique name. This name will be displayed at the mail server account list.
e-mail ID - Email	You must enter the e-mail address you use at your receiving mail server.
Mail Server Settings - Mail Server Name or IP:	You must enter the address of your mail server. You may use a name or the IP address.
Mail Server Settings - User Name & Password:	You must enter the user name and the password you use to access the mail server.
Mail Server Settings - Mail Protocol:	At the current release only IMAP is supported and fully functional as your e-mail protocol. The POP protocol will be available in the future.
Mail Server Settings - SSL Options:	You must select whether you want encrypted communicate with your e-mail server.
Mail Server Settings - Certificate Validations:	If you use encryption to access the mail server, you should select whether the certificate is validated.
Mail Server Settings - Use Internal Mailer:	If configured by your service provider, you might use the internal mailer to send e-mails.
Mail Server Settings - Refresh Timeout:	You may change the refresh rate.
Mail Server Settings - Emails per page:	You may select the number of e-mails (webmails) you want to display on a single page.

Click [**Save**] to configure the mail function at the CRM system.

All your e-mails are organised at the **My Home Page > Webmail** menu as displayed in [figure: Webmail Menu](#).

The buttons at the top of this figure provide the following functions:

**Compose:**

This opens the compose window.

**Settings:**

This opens the settings window for your incoming e-mails. Note that the administrator configures the outgoing mail server.

The CRM comes with a set of standard mail folders:

**Inbox:**

This folder lists all your incoming e-mails. Thereby, the following cases are distinguished:

- If an e-mail comes from a contact which is not related to any of the campaigns, on qualifying the e-mail will automatically be moved to the **Qualified Mails** folder and related to that contact.
- If an e-mail comes from an undefined user, on qualifying the CRM system will create a new contact and associates the e-mail to the newly created contact.
- If an e-mail comes from a lead of a Campaign, on qualifying the e-mail of the corresponding Lead will be converted to a contact related with the Campaign. The CRM system traces the conversion ratio of Leads to Contacts on a per campaign basis to judge the effectiveness of a Campaign.
- If an e-mail comes from a Contact of a Campaign, on qualifying the e-mail will be added and related to that Contact.

All qualified e-mails will be moved into the **Qualified Mails** folder automatically.

**Sent Mails:**

This folder lists all your sent mails organized by the type of contact.

You may search your e-mails by the subject or sender or both.



**Important**

E-mails are received in unprotected mode. That means that the CRM does not check for any viruses or other threats frequently transmitted by e-mails. Even if these threats cannot cause any damage to the CRM, it is advised to take protecting actions at the receiving mail server, especially if you plan to download e-mail content to your computer.

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## 3.2. Working with the sales process

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The CRM system has been designed to support you in all phases of your sales cycles, starting with leads up to closed businesses by integrating all relevant data.

Sales processes are defined differently in each enterprise. Yet, there are common principles for the work flow, which the CRM system represents.

The most common scenario for goods or services with longer sales cycles could be:

1. When you have your first contact to a prospective customer, you create a lead. At this time you do not know whether this contact has serious interests in the goods or services your company offers. You may collect as much information about this contact as possible.
2. Now sales is starting to work with this lead. You may schedule meetings, make some calls or send e-mails until you know whether there is a business opportunity.
3. If you find out that this lead does not go any further, you set the lead status to **lost** and forget about it. If this lead looks promising for your business, you can convert it to a sales potential.
4. During conversion the CRM will create a sales potential, an account and a contact, using the data you have already collected. The lead will be deleted.
5. Now you start working with the potential. You indicate the progress by setting different sales stages.

The contact and account information related to your sales potential are the basis for you and your co-workers for the work with a potential customer. You may use this information for scheduling and controlling activities, distributing tasks, forecasting revenues, understanding the purchase decision process of a customer, and much more.

### 3.2.1. Working with Leads

A lead represents the first stage of a sales process and is therefore the starting point for many activities. In order to work with leads effectively the CRM system provides you a set of tools.

#### Leads List View

You may reach the lead list view at the **Sales > Leads** menu as shown in [figure: Lead List View](#).

**Sales > Leads** + Q 📅 🕒 📊 🗨️ 🔍 ⬇️ ⬆️ 📄

<input type="checkbox"/>	Last Name ▼	First Name	Company	Phone	Website	Email	Assigned To
<input type="checkbox"/>	Brown	Elizabeth	X-ceed inc 99	(414) 109-3336	www.x-ceedinc99.com	elizabeth_brown@company.com	admin
<input type="checkbox"/>	Davis	Jennifer	Vtiger	(524) 539-2290	www..com	jennifer_davis@company.com	admin
<input type="checkbox"/>	Johnson	Patricia	T3m invest a/s	(011) 822-6477	www.t3minvesta/s.com	patricia_johnson@company.com	admin
<input type="checkbox"/>	Jones	Barbara	Vtigercrm inc	(555) 279-7869	www.vtigercrm.com	barbara_jones@company.com	admin
<input type="checkbox"/>	Miller	Maria	T3m invest a/s	(618) 279-1479	www..com	maria_miller@company.com	admin
<input type="checkbox"/>	Moore	Margaret	Vtigercrm inc	(786) 939-7493	www..com	margaret_moore@company.com	admin
<input type="checkbox"/>	Smith	Mary	Vtiger	(051) 644-0349	www.vtiger.com	mary_smith@company.com	admin
<input type="checkbox"/>	Taylor	Dorothy	X-ceed inc 99	(720) 999-1509	www..com	dorothy_taylor@company.com	admin
<input type="checkbox"/>	Williams	Linda	Edfg group limited	(237) 733-7335	www.edfgrouplimited.com	linda_williams@company.com	admin
<input type="checkbox"/>	Wilson	Susan	Edfg group limited	(544) 912-6294	www..com	susan_wilson@company.com	admin

Delete Send Mail Change Status Change Owner Showing 1 - 10 of 10 Filters : All New | Edit | Delete

Delete Send Mail Change Status Change Owner Showing 1 - 10 of 10 Select template to Mail Merge: Merge

**Figure 3.14. Lead List View**

At this menu you may

- **delete leads:** Mark the leads to be deleted and hit the appropriate button.
- **send e-mails to leads:** Mark the leads to be recipients and hit the appropriate button. Refer to [section: Sending Emails](#) for further instructions.

- **change the status of a lead:** A lead status represents the status of your work with a lead. The CRM offers you several lead states. Note that your system administrator may change the status list. Mark the leads to be changed and hit the appropriate button. In the pop up window select the new status.
- **change the owner of a lead:** Owners are CRM users only. Mark the leads to be changed and hit the appropriate button. Note that any further access is controlled by the role settings of the new owner.
- **create, modify and use display filters:** As described in [section: Customize Lists](#), you may change the content of your list view on the basis of filters.
- **merge lead information with e-mail templates:** Mark the leads to be merged, select a template and hit the appropriate button. You may refer to [section: Mail Merge Templates](#) for further information.

### Link Leads with other CRM entries

You may link a lead with other activities such as calls, meetings or tasks and with e-mails, attachments, notes or products. To establish such links, you may use one of the following ways:

1. **By the lead detail view**

Open an existing lead and create new entries related to this lead.

2. **By direct entry**

Click **[New Event]**, **[New Task]**, **[New Note]** or **[New Product]** in the entry area of your CRM system, or open an existing entry. Select the related Lead as a reference before you save your entries. The information will be linked to the lead and will be available at the lead's detail view.



#### Note








All established links will be also available at sales potentials after conversion as explained in [section: Creating Potentials from Leads](#).

### 3.2.2. Working with Potentials

In the sales process, sales potentials are the logical successors of a leads. Therefore, you should create a sales potential from a lead and transfer all information available for the lead to this sales potential as explained in the next section. You can also directly create a sales potential (see [section: Direct Entry of Potentials](#)). Sales potentials are characterized by the fact that obvious interests of a potential customer in an offer from your company exist. Sales expects that an offer can be made in the future and estimates that it is appropriate to take over lead data.

#### Creating Potentials from Leads

To create a sales potential based on an existing lead, you have to switch to the lead detail view as shown in [figure: Lead Detail View - Master Data](#).

**Sales > Leads**          

**[ 1 ] Smith John - Lead Information**  
Updated today (15 May 2006)

**Lead Information** More Information


**Edit Duplicate Delete Send Mail Convert Lead**

Lead Information			
First Name	Mr. John	Phone	+49 30 123-4567
Last Name	Smith	Mobile	+49 170 123-4567
Company	Sample Inc.	Fax	+49 30 123-4568
Designation	Owner	Email	j.smith@sample.com
Lead Source	Trade Show	Website	www.sample.com
Industry	Environmental	Lead Status	Attempted to Contact
Annual Revenue		Rating	Active

snip .....

**Figure 3.15. Lead Detail View - Master Data**

Click the Button [**Convert Lead**]. A new pop up window will open as shown in [figure: Convert Lead](#).

**Convert Lead: John Smith** 


**Convert Lead Information**

Assigned To:

Account Name:

Do not create a New Potential upon Conversion:

\*Potential Name:

\*Potential Close Date:   (yyyy-mm-dd)

Potential Amount:

\*Potential Sales Stage:

**Save Cancel**

**Figure 3.16. Convert Leads**

With the lead conversion the following operations are automatically performed by the CRM system:

- Creation of new entries for **Accounts** and **Contacts**. Transfer of all data from the lead to the new created entries.
- Creation of a potential linked to the newly created account and contact.
- Deletion of the lead.



**Note**

A lead transformation cannot be canceled.

In reference to the [figure: Convert Lead](#), you can control the conversion by making the following entries:

**Table 3.4. List of settings for lead conversion**

Assigned To:	Here you must chose the new owner of the converted data.
Account Name:	This shows you the account name as stored with the Lead.
Do not create a new potential upon conversion:	If you mark the check box, only new entries for an account and for a contact will be created by the conversion. There will be no potential related to it. You may use this function if you intend to store account and contact information that are not related to an upcoming business but important enough to be listed in the CRM system.
Potential Name:	Here you must enter an unique name for your new potential. It makes sense to include the account name in order to maintain a clear name structure.
Potential Close Date:	You must pick a most likely closing date for this potential. You will be able to change it later if necessary. This is a useful information e.g. for creating forecasts.
Potential Amount:	You may enter a potential amount of the business you expect. You may change it later. This amount might be used for forecasts.
Potential Sales Stage:	You must enter a sales stage for the potential. The sales stages can be defined and changed by the CRM administrator.

Click [**Save**] to execute the conversion.

After conversion a new window will open that shows the detail view of the account you have just created. In the **More Information** tab you will also find the links to the related contact and the sales potential.

Your new potential is now also listed at the potential list view as shown in [figure: Potentials List View](#).

<input type="checkbox"/>	Potential Name	Account Name	Sales Stage	Lead Source	Expected Close Date	Assigned To
<input type="checkbox"/>	EDFG Group Limited - 1000 units	EDFG Group Limited	Closed Won	Trade Show	2006-04-22	admin
<input type="checkbox"/>	t3M Invest A/S - 1000 units	t3M Invest A/S	Closed Won	Word of mouth	2006-02-12	admin
<input type="checkbox"/>	Vtiger	Vtiger	Needs Analysis	Partner	2006-05-23	admin
<input type="checkbox"/>	vtiger - 1000 units	vtiger	Closed Won	Web Site	2006-09-21	admin
<input type="checkbox"/>	Vtiger-demo	Vtiger	Prospecting	Public Relations	2006-11-01	admin
<input type="checkbox"/>	vtigerCRM Inc - 1000 units	vtigerCRM Inc	Closed Won	Existing Customer	2006-07-06	admin
<input type="checkbox"/>	X-CEED INC 99 - 1000 units	X-CEED INC 99	Closed Won	Employee	2006-05-12	admin
<input type="checkbox"/>	X-ceed inc 99-	X-ceed inc 99	Prospecting	Self Generated	2006-12-12	admin

**Figure 3.17. Potentials List View**

### Note

Contents of this list representation are freely configurable. Beyond this, these lists can be automatically evaluated by the CRM system, in order to refer to certain events. You will find further information related to this topic in [section: Working with Lists](#).



## Change the Potentials List view

You may reach the lead list view at the **Sales > Potentials** menu as shown at the previous [figure: Potentials List View](#).

At his menu you may:

- **delete potentials:** Mark the potentials to be deleted and hit the appropriate button.
- **change the owner of a potential:** Owners are CRM users only. Mark the potentials to be changed and hit the appropriate button. Note that the further access is controlled by the role settings of the new owner.
- **create, modify and use display filters:** As described in [section: Customize Lists](#) you may change the content of your list view on the basis of filters.
- **search lists:** As describes in [section: List Search](#), you may reduce the number of potentials displayed by using the filters of the advanced search function.

## Use the Potential Detail View

You may use the potential detail view to link a potential with further CRM entries. In the detail view click the **[more Information]** tab.

In this menu you may:

- **assign Activities to Potentials:** You may assign any activity to a sales potential.
- **assign Contacts to Potentials:** You may assign any person stored in the CRM to a sales potential.
- **assign Products to Potentials:** You may add any product or service listed in your product catalogue to a sales potential.
- **view Sales Stages:** Within the sales potentials you have the possibility to specify different sales phases. That helps you document the development of a customer relation. Information about the past sales phases is logged by the CRM system.



### Note

The CRM provides you with a set of default sales stages. Your system administrator may change these based on your company's requirements.

Each change of the sales stage automatically creates an entry at Sales Stage History tab. This entry includes

- the amount of the potential,
- the sales stage,
- the probability,
- the expected closing date,
- and the date of modification.
- **assign Attachments to Potentials:** You may add any type of attachment to a sales potential.
- **Quotes:** The menu lists the existing quotes for a potential and allows you to create new quotes.
- **Sales Orders:** The menu lists the existing sales orders for a potential and allows you to create new orders.

- **Activity history:** You may see all past activities related to a potential if they have been marked as **held** in the calendar.

### Send E-mails to Contacts related to Potentials

In order to send an e-mail to a contact which is listed at the potentials detail view, you need to select this contact by clicking its name. The detail view of this contact opens. Proceed as described in [section: Sending Emails](#). You may send an e-mail to multiple contacts by creating a special list and using the mass mail function as explained in [section: Email Mass Mailing](#).

### Link Potentials with other CRM Entries

You may link a potential with other activities such as calls, meetings or tasks and with contacts, products, attachments, notes, quotes or sales orders . To establish such links you may use one of the following ways:

#### 1. by the potential detail view

Open an existing potential and create new entries related to this potential as described in [section: Use the Potential Detail View](#).

#### 2. by direct entry

Click [**New Event**], [**New Task**], [**New Notes**], [**New Quote**] or [**New Sales Order**] at the entry area of your CRM system, or open an existing entry. Select the related potential as a reference before saving your entries. The information will be linked to the potential and will be available at the potentials detail view.

### 3.2.3. Working with Support

The CRM system offers comfortable possibilities to maintain the valuable customer relationships after a business transaction has been made, by offering support functions.

Why should you use the support functions?

- Above all, the support functions help you to collect and sort customer requests, inquiries, disturbances, problems etc. related to the sold goods or services.
- The support functions keep CRM users and customers informed on the status reached in respect to the response to customers messages.
- Support staff gets a very effective tool to keep track of customer complaints or requirements related to customers or products or both.
- Sales staff and management can get a quick overview of support activities related to customers or products or both.
- CRM user or customer get a convenient access to frequently ask questions (FAQ). That can help you company to keep the service requests low and to maintain standard procedures in responding to customers requests.

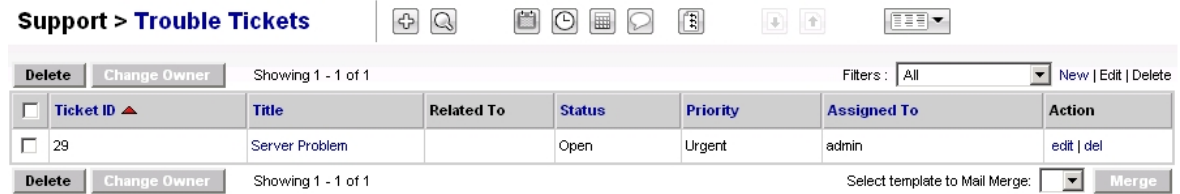
The CRM's capabilities of providing FAQ as well as tickets are extended by the Customer Portal functions as explained at Customer Portal manual.

### Trouble Tickets

In the CRM terminology, tickets are any kind of customer service requests as they occur after sales. Tickets are listed at the **Support > Trouble Tickets** menu.

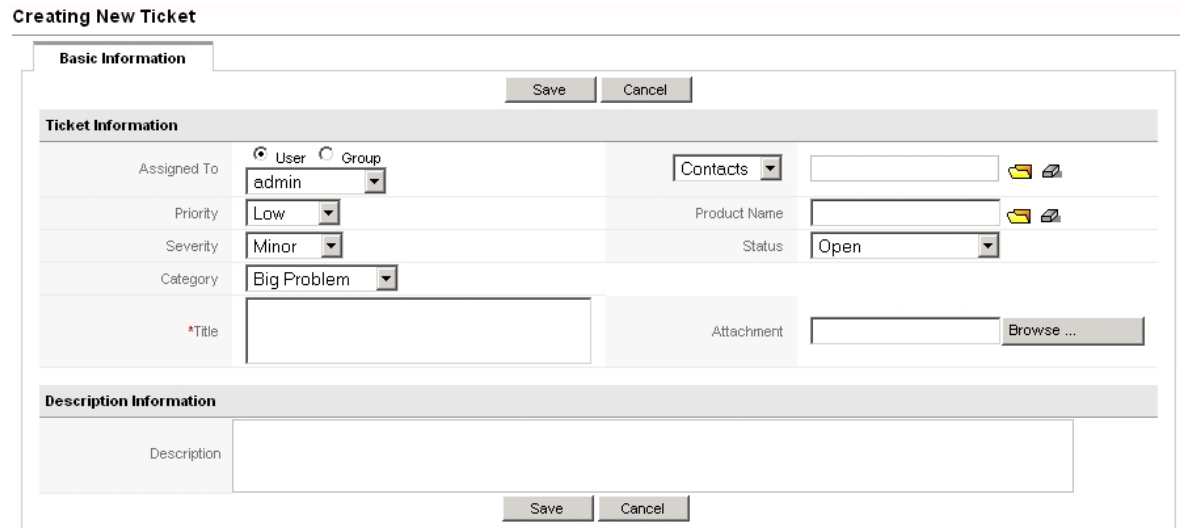
### Create New Tickets

To create a new ticket, open the **Support > Trouble Tickets** menu as shown in [figure: Trouble Tickets - List View](#) with two sample entries. You may use the magnifying glass icon on top of the list for searching the list. You may also use this menu to change the owner of a ticket, delete unwanted tickets, set filter functions for the list view or merge ticket information with templates.



**Figure 3.18. Trouble Tickets - List View**

Click the **plus icon** to open a new ticket as shown at [figure: Ticket - Edit View](#).



**Figure 3.19. Ticket - Edit View**

You should enter as much information as possible. Use the Priority, Severity and Category to weight the ticket. In detail you should provide the following information:

**Table 3.5. List of default entry fields for tickets**

Assigned To:	You may assign the ticket to a person who is listed as CRM user or to a user group. This person or group will be in charge to answer to the customer's request.
Priority, Severity and Category:	You may select the appropriate entries based on their importance. That can help your service staff to schedule their work and the management to be informed.
Title:	You should give each ticket a unique name.
Contacts, Accounts:	You should link this ticket to a specific contact or account.

Product Name:	You may link this ticket with goods or services your company has sold.
Status:	You should set the actual status of the ticket.
Attachment:	You may add an attachment to a ticket.
Description:	You should enter a brief description of the cause for this ticket.



### Tip

Your CRM system administrator may add additional custom field to your tickets or change the contents of the drop down lists.









### Caution

If you intend to use the Customer Portal, you may check the information provided for the customers before changing the configuration in order to preserve the confidentiality of internal data.

## Work with Tickets

In [figure: Trouble Tickets - List View](#), one sample ticket is already listed. To work with a ticket click, its title. A new window will open as shown in [figure: Ticket Detail View - Master Information](#).

**Support > HelpDesk**      

**[ 111 ] Import Error CSV Leads - Ticket Information** +addtag  
Updated 2 days ago (26 May 2006)

**Ticket Information** More Information

[Edit](#) [Duplicate](#) [Delete](#) [Convert .As FAQ](#)

Ticket Information			
Assigned To User	admin	Contact Name	Taylor Dorothy
Priority	Normal	Product Name	Vtiger 25 Users Pack
Severity	Minor	Status	Open
Category	Small Problem	Created Time	2006-05-26 21:50:21
Modified Time	2006-05-26 21:50:21		
Title	Import Error CSV Leads	Attachment	

**Description Information**

Description


**Solution Information**

Solution

**Comments**

Add Comment

**Tag Cloud**



**Select template to Mail Merge:**

Merge

**Select template to Mail Merge:**

Merge

**Figure 3.20. Ticket Detail View - Master Information**

At this menu you may:

- **edit, duplicate or delete a ticket:** The edit function allows you and your co-workers to change the entries and to make comments before or after a solution has been found. Note that you may enter data with-

out opening the edit view. Just move the mouse pointer to the appropriate fields within the detail view to make your entries.

With the duplicate function you may copy a ticket. This function might be useful to split ticket. Use the delete function carefully. It might be better to keep a ticket in the list and change its status.

- **convert as FAQ:** You may receive frequent customer requests to a same topic. This function allows you to convert a ticket to a FAQ as explained in the next section.
- **add a tag:** You may use this function to set your own priorities as explained in [section: Tag Cloud](#).
- **merge the ticket information with a template:** You may use this function to merge ticket information with an e-mail template.

You can modify the master data in the edit view of a ticket as shown in [figure: Ticket Edit View](#).

#### [ 111 ] Import Error CSV Leads - Editing Ticket Information

Updated 2 days ago (26 May 2006)

The screenshot shows a web-based form for editing a ticket. At the top, there are two tabs: "Ticket Information" (selected) and "More Information". Below the tabs are "Save" and "Cancel" buttons. The form is organized into several sections:

- Ticket Information:** This section contains several fields:
  - Assigned To:** Radio buttons for "User" (selected) and "Group". A dropdown menu shows "admin".
  - Priority:** A dropdown menu showing "Normal".
  - Severity:** A dropdown menu showing "Minor".
  - Category:** A dropdown menu showing "Small Problem".
  - Product Name:** A dropdown menu showing "Vtiger 25 Users Pack".
  - Status:** A dropdown menu showing "Open".
  - Title:** A text input field containing "Import Error CSV Leads".
  - Attachment:** A text input field with a "Browse ...." button.
- Description Information:** A text area containing the text "What is the import proper format for leads?".
- Solution Information:** A text area containing the text "See chapter 2 of the manual."
- Comments:** A text area containing the text "Manual is still work in progress. Look at the contact section for the proper format." Below this area is an "Add Comment" label.

At the bottom of the form, there are "Save" and "Cancel" buttons.

**Figure 3.21. Ticket Edit View**

Each ticket can go through different working stages and will be closed sooner or later. The CRM will help you to keep track of the working progress and records the changes.

Any CRM user can post a comment. The comments will be sorted in chronological order and indicate the CRM user who made the comment. At the end of the live cycle of a ticket, you may present the solution.

All changes to a ticket are displayed at the ticket history. The information provided allows you to find out:

- Who changed ticket information?
- What changes have been made?
- What was a change made?

Click the **More Information** tab to view or to add ticket related activities, notes or attachments.

## Frequently Asked Questions (FAQ)

The CRM system offers you to have a FAQ list. FAQ refer to listed questions and answers, all supposed to be frequently asked in some context, and pertaining to a particular issue. You may use this for instance

- as a knowledge base to inform your customers about your products, services or procedures,
- for your employees to inform on internal business procedures,
- for your service staff to discuss procedures for helping customers,

and much more.

You may reach the FAQ list at the **Support > FAQ** menu. Click the **[plus icon]** on top of the list to enter a new FAQ. In [figure: New FAQ Entry](#) you see the screen for a new FAQ entry. You may enter a question and an answer.

**Creating New Faq**

Save   Cancel

**Faq Information**

Product Name	<input type="text"/>		Category	General ▾
Status	Draft ▾			
* Question	<input style="width: 95%;" type="text"/>			
* Answer	<input style="width: 95%;" type="text"/>			

Save   Cancel

**Figure 3.22. New FAQ Entry**

In addition, you may

- link this entry to a product or service your company offers,
- assign a category for this entry,



### Note

Your CRM system administrator may change the categories.

- set a status for the entry.



### Caution

FAQ are also displayed at the Customer Portal. You may control the FAQ entries that will be published at the Customer Portal. Only entries with the status **published** will be visible there.

### 3.2.4. Reporting and Analysis

The CRM provides you with several possibilities for evaluating your data according to criteria you have selected beforehand.

**Dashboard:**

The dashboard gives you a graphical representation of your sales and service data.

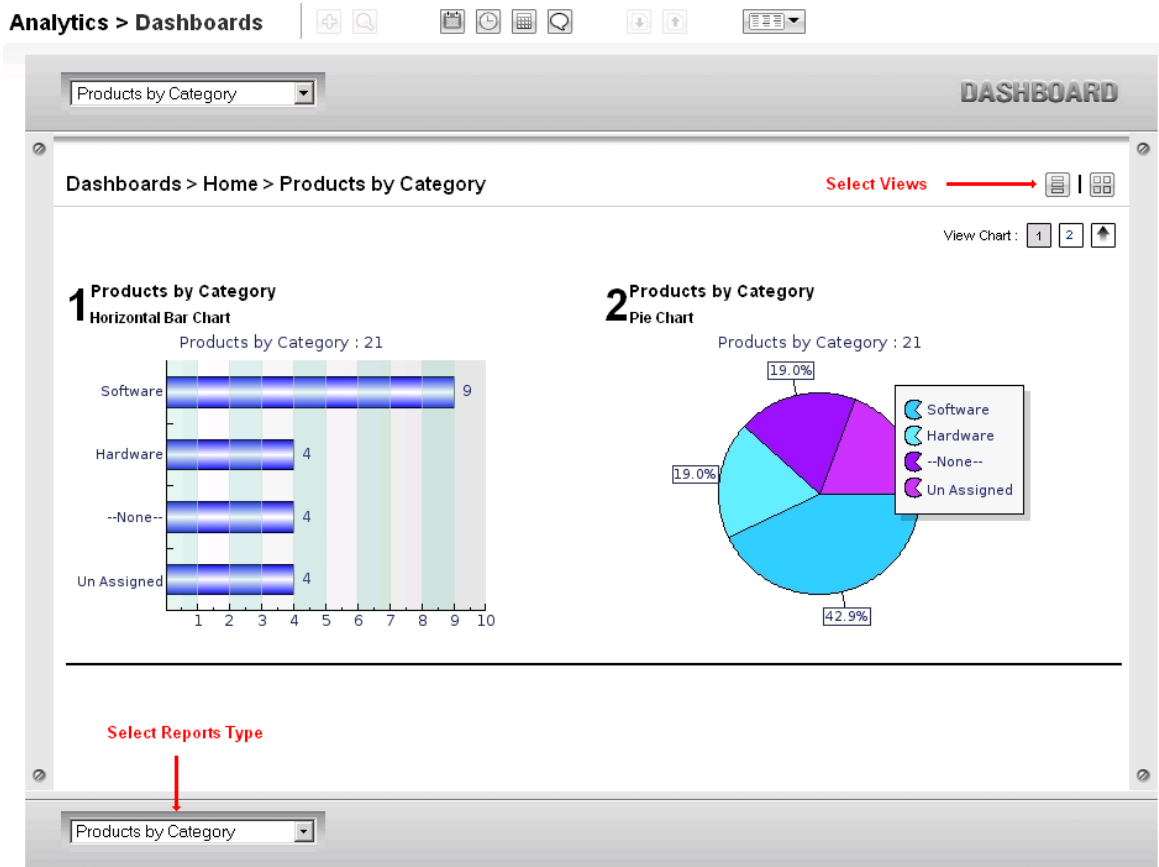
**Reports:**

You may summarize your data stored in the CRM by reports. You have a set of predefined reports available which you can customize to your needs.

You should use these report and analysis features to get an overview of customer related activities and to draw conclusions on how to improve your sales process.

#### Dashboard

You can reach the Dashboard function at the **Analytics > Dashboard** menu. The dashboard includes a graphical representation of sales and services related data as partly displayed in [figure: Dashboard](#).



**Figure 3.23. Dashboard**

You may switch between different reports and views. Some reports, such as **Dashboard Home**, allow you to

modify the period as well as the type of data included. Click **[Edit]** to modify the settings. Use the **Strg** button on your keyboard to select multiple data sets to be displayed.

## Note

The time period used at the dashboard does not automatically update with the passing time. You have to set the required period, and you should click **[Refresh]** to make sure the actual data are shown.

The sales stages, status as well as the other source information used may get changed by your CRM system administrator.

## Reports

You may get a report for almost any data you have stored in your CRM at the **Analytics > Reports** menu as shown in [figure: Reports Home](#).

**Analytics > Reports**

The screenshot displays a list of reports organized into several categories. Each category has a table with columns for Report Name, Description, and Tools. Red arrows point to icons for creating, moving, and deleting reports. A yellow box highlights the 'Click Here to add new group' button.

#	Report Name	Description	Tools
<b>Account and Contact Reports</b>			
1	Contacts by Accounts	Contacts related to Accounts	☑
2	Contacts without Accounts	Contacts not related to Accounts	☑
3	Contacts by Potentials	Contacts related to Potentials	☑
<b>Lead Reports</b>			
#	Report Name	Description	Tools
1	Lead by Source	Lead by Source	☑
2	Lead Status Report	Lead Status Report	☑
<b>Potential Reports</b>			
#	Report Name	Description	Tools
1	Potential Pipeline	Potential Pipeline	☑
2	Closed Potentials	Potential that have Won	☑
<b>Activity Reports</b>			
#	Report Name	Description	Tools
1	Last Month Activities	Last Month Activites	☑
2	This Month Activities	This Month Activites	☑
<b>HelpDesk Reports</b>			
#	Report Name	Description	Tools
1	Tickets by Products	Tickets related to Products	☑
2	Tickets by Priority	Tickets by Priority	☑
3	Open Tickets	Tickets that are Open	☑
<b>Product Reports</b>			
#	Report Name	Description	Tools
1	Product Details	Product Detailed Report	☑
2	Products by Contacts	Products related to Contacts	☑
<b>Quote Reports</b>			
#	Report Name	Description	Tools
1	Open Quotes	Quotes that are Open	☑
2	Quotes Detailed Report	Quotes detailed report	☑
<b>PurchaseOrder Reports</b>			
#	Report Name	Description	Tools
1	PurchaseOrder by Contacts	PurchaseOrder related to Contacts	☑
2	PurchaseOrder Detailed Report	PurchaseOrder detailed report	☑
<b>Invoice Reports</b>			
#	Report Name	Description	Tools
1	Invoice Detailed Report	Invoice detailed report	☑

Click Here to add new group

Delete Reports ...

Move Reports ...

Create New Folder ...

Create Reports ...

Figure 3.24. Reports Home



The CRM offers you a report generator as well as a report designer.

### Report Generator:

The report generator provides you with reports which you can see at the screen or export as PDF or Excel files.

### Report Designer:

The report designer allows you to select the data you want to see in a report and to modify their representation.

The CRM comes with a rich selection of standard reports as illustrated in the previous figure. Each of these reports comes as two types:

### Tabular Report:

Tabular reports are the simplest and fastest way to get a listing of your data.

### Summary Report:

Summary reports allow you to view your data along with subtotals and other summary information.

In the following section I will explain how to modify reports or even setup your own report folders.

## Edit Reports

To change an existing report click the **Report Name**. An new window will open which list the selected report and allow to customize it.

The screenshot displays the 'Lead by Source' report detail view. At the top, there is a title bar with '<Back to Reports' and '(Customize Report)'. To the right of the title bar is a 'Select Another Report:' dropdown menu with 'Lead by Source' selected. Below the title bar, there are four fields: 'Select Column:' (Leads - Created Time), 'Select Time:' (Custom), 'Start Date:', and 'End Date:'. A 'Generate Now' button is located below these fields. Below the main area, there are three buttons: 'Export To PDF', 'Export To Excel', and 'Print Report'. At the bottom, there is a list of reports with 'Lead by Source' selected, and a 'Total: 10 Records' indicator.

**Figure 3.25. Report Detail View**

To open the report editor for changing an existing report, click **Customize Report** as indicated in [figure: Report Detail View](#). Follow the instructions.

To create a new report, click the **New Reports** icon shown in [figure: Reports Home](#). First you are ask for the CRM module which provides the data for the report. Based on this selection the fields available for the reports are selected by the CRM system.

The opening pop up window displays the next steps for report creation as shown in [figure: New Report Detail](#).

**Report Creator**

**1. Report Details**

2. Relative Module

3. Report Type

4. Select Columns

5. Specify Grouping

6. Calculations

7. Filters

**Report Details**  
Type the Name & Description for the report

**Report Name :**

**Report Folder :** Account and Contact Reports

**Description:**

< Back    Next >    Cancel

**Figure 3.26. New Report Detail**

Follow the instructions.



### Caution

At the current release, the CRM does not monitor the available site space for a proper PDF to be created. If you chose too many columns, you might not get a useful PDF export.



### Note

Designing a report can be a very complex task. You should start with a very simple report and frequently check your results before beginning to use filter functions.

If your report design is finished, click [**Next**] to save your settings and to start the report generator. Then you

- can see the report at your screen,
- may export the report as PDF or Excel file, and
- may print the report.

Example: Let's assume you want to have a list of accounts who bought a specific product

You should follow these steps to create a report:

1. create a new report with a name, report folder and description
2. you will be asked for the related module; select Products
3. you will be asked for the format of the report; make your choice
4. select the fields you want have in the report
5. select the field in advanced filter as **Product Name - equals -<name of your product>**

## Customized Report Folders

To create your own report folder, click the **[Create New Folder]** icon as shown in [figure: Reports Home](#). In the new pop up window, you may give this folder a name and a description.

Click **[Save]** to create this folder. You could use this folder to store your own or modified reports. The new folder will be listed at the **Analytics > Reports** menu.

At the **Analytics > Reports** menu you may also move or delete reports by clicking at the appropriate buttons or icons.



### Note

You may create any report to be listed in your own folders. Select your folder in step 1 of the new report creation process.

## 3.2.5. Synchronizing CRM with Office Environment

The CRM comes with a set of programs which enhance the functionality of your office environment by linking your desktop computer with the CRM system.

### Thunderbird Extension

The Thunderbird/Mozilla e-mail client is an Open Source program that runs under Windows, Mac and Linux operating systems. It allows you to send and receive e-mails and contains an address book. With the help of the Thunderbird Extension program you may:

- send e-mails you have received, to the CRM and store them in reference to the appropriate contact
- send contact information from your e-mail client to the CRM
- receive contact information from your CRM

Please consult the Thunderbird extension manual for further information.

### Outlook Plug-in

MS Outlook is most common in office environments. The Outlook plug-in enhances the functionality of outlook and allows to synchronize data between Outlook and the CRM system. In detail you may

- transfer any e-mail to the CRM system and attach it to the appropriate contact
- synchronize your calendar
- synchronize your contacts
- synchronize your notes
- synchronize your tasks

Please consult the Outlook plug-in manual for further information.

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## Chapter 4. Administrative Tasks

This chapter explains how the CRM system can be configured and managed by users with administrative privileges.

It is most important that a CRM system administrator is capable to configure the CRM according to the intended purpose and the company's business processes. Any skilled CRM administrator knows that understanding how things work is as important as knowing how things are done. Therefore, the following sections describe not only the CRM functions but also the basics of role based security and other business related issues an administrator should consider.

### 4.1. Role Based Security Basics

---

With the latest CRM version role based security has been implemented to control who is allowed to browse, delete or update information stored in the CRM. This is a significant improvement, making the CRM system more scalable, flexible, and easier to implement for larger corporations.

This section explains how to start working with CRM's security settings and the role-based security concept as it is provided by the CRM system. It's an overview of all types of considerations an administrator should go through before starting to setup the CRM system.

#### 4.1.1. Introduction to Role Based Security

The CRM system operates on the basis of a state-of-the-art security management which utilizes the concepts of roles, similar to the implementation of security in many current computer operating systems. Role based security (also called role based access control) is built on the premise that users are authenticated, which is the process of identifying the user. Once identified, roles and permissions are assigned.



#### Note

Role based security specifies and enforces enterprise-specific security policies in a way that maps naturally to an organization's structure.

Role based security has become the predominant model for advanced access control because it reduces the complexity and cost of security administration.

While role-based security may be overkill in trivial settings (e.g. small enterprises with a couple of users who are all allowed to browse, delete or update all data) it is an extremely powerful tool for handling complex environments. This includes typical company settings where various sales teams or customer service teams need to browse, delete or update customer related data while at the same time permissions on such data may vary depending on the function or task of an employee within the company. This concept is especially suited for companies:

- who want to have a larger number of people to work with the CRM simultaneously,
- who want to have restricted browse, delete or update capabilities for individual users, and
- who want to have an hierarchical privilege order implemented.

Although role based security does not promote any one protection policy, it has been shown to support several well-known security principles and policies that are important to commercial and government enterprises which process unclassified but sensitive information. These policies can be enforced when profiles are authorized for a role, when users are authorized as members of a role, at the time of role activation (e.g., when a

role is established as part of a user's active session), or when a user attempts to perform an operation on data.

### 4.1.2. Definition of Terms

#### Definition of Users

There are two types of users for the CRM software:

- standard user
- administrator user

Standard users have a limited access to the CRM system to perform CRUD (Create, Retrieve, Update, and Delete) and limited user specific customization operations.

Administrator users are capable to manage the complete software including:

- managing users and groups and their access privileges,
- customizing the CRM user interface,
- creating communications templates,
- configuring all organization-wide settings,
- changing passwords, deactivating users, and viewing the login history, and
- exercise CRUD operations for all data.

In [figure: Special Admin Function](#) you see the detail view of an users provided by the CRM user management function. With marking the **Admin** check box any user may get administration privileges and become an administrator user.

The screenshot shows a user management interface. At the top, there is a breadcrumb trail: "Settings > Users > 'StandardUser'". Below this, a user icon and the text "Viewing details about the user 'StandardUser'" are visible. On the right side, there are three buttons: "View Audit Trail", "Duplicate", and "Edit". The main content area is titled "1. User Login & Role" and contains a table with user details. The "Admin" checkbox is checked and highlighted with a red box.

User Name	standarduser	Admin	off
Password	<a href="#">Change Password</a>	Email	
Status	Active	First Name	
Currency	EURO : €	Last Name	StandardUser
Default Lead View	Today	Role	Vice President
Default Calendar View	This Year		

snip .....

Figure 4.1. Special Admin Function at Users Menu

**Note**

Administrator user have all privileges in the organization.

## Definition of Roles

At the core of role based security stands the concept of collecting permissions in roles, which can be granted to standard users. Each role is based on one or more profiles. It is a user's membership in roles that determines the privileges the user is permitted to perform. Security administration with role based security consists of determining the operations that must be executed by persons in particular jobs, and assigning employees to the proper roles. The role based security framework provides for mutually exclusive roles as well as roles having overlapping responsibilities and privileges.

For example, some general CRM operations may be allowed for all employees, while other operations may be specific to a role. Role hierarchies are a natural way of organizing roles within an organization and defining the relationship and attributes of the roles. Complexities introduced by mutually exclusive roles or role hierarchies as well as regulating who can perform what actions, is all handled by the role based security settings.

One of the greatest advantages of role based security is the administrative capabilities it supports. User membership in roles can be assigned and revoked easily, and new memberships established as job assignments dictate. With role based security, users are not granted permission to perform operations on an individual basis, rather operations are associated with roles. Role association with new operations can be established as well as old operations deleted, as organizational functions change and evolve. This basic concept has the advantage of simplifying the understanding and management of privileges. Roles can be updated without having to directly update the privileges for every user on an individual basis.



### Important

Each user created in the CRM system must be associated with a role. A role must be associated with at least one profile.

Furthermore, individual users (e.g. John, Mary) might be assigned to one or more roles, where the roles are based on the user's job responsibilities and competencies in the organization. Users should be assigned multiple roles to reflect the fact that some users connect to the system in different function depending on the tasks. For example, user **John** might be assigned the role **Head-Sales**, because John is the head of sales at your company, as well as the role **admin**, because John is also CRM system administrator. If John wants to work as administrator he logs in as admin, if John wants to work as head of sales, he logs in as Head-Sales. It is possible to let John connect to the system with the same password, regardless of whether he acts as administrator or head of sales.



### Note

Users at any given role can always view, edit, delete all data owned by users below in the hierarchy.

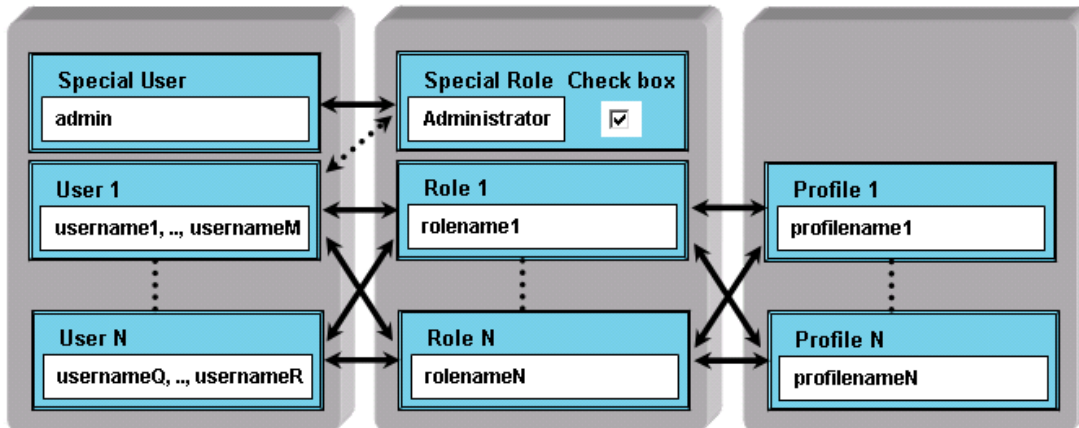
For the CRM system to reach its full potential as a means for enterprise CRM, access control mechanisms must be in place which can regulate user access to information in a way that face your business today. Role based security allows for the specification and enforcement of a variety of protection policies which can be tailored on an enterprise-by-enterprise basis. The purpose of the role based security setting is to provide this access control service. Once the role based security framework is established for the organization, the principal administrative actions are the granting and revoking of users into and out of roles as job assignments dictate. These maintenance tasks are easily performed using the CRM system's user settings tool.

## Definition of Profiles

Profiles are used to define privileges for executing CRM system operations. From a functional perspective, the central notion of role based security is that of profiles representing actions associated with roles and users that are appropriately made members of roles.

The relationships between users, roles, and profiles are depicted in [figure: Users, Roles and Profiles Relations](#) as many-to-many relationship. For example, a single standard user can be associated with one or more roles by different user names, and a single role can have one or more user members. Roles can be created for various job positions in an organization. For example, a role can include sales representative or assistant in a company.

The profiles which are associated with roles, constrain members of the role to a specified set of actions. For example, within a sales organization the role of the sales representative can include operations to create, edit, and delete the own accounts; the role of an assistant can be limited to browse existing information of a particular sales rep, and the role of the head of sales may be to review all sales data.



**Figure 4.2. Users, Roles and Profiles Relations**

The association of profiles with roles within an enterprise can be in compliance with rules that are self-imposed. Profiles can be specified in a manner that can be used in the demonstration and enforcement of regulations. For example, an assistant can be constrained to adding a new entry to a customers history rather than being generally able to modify sales records.

Access privileges based on profiles are set by the CRM system administrator. The administrator has to set these privileges when configuring the CRM system. Thereby the following privilege types are available:

- the permission to use certain CRM modules
- the permission to view data in certain CRM modules
- the permission to edit or to change data in certain CRM modules
- the permission to delete data in certain CRM modules
- the permission to export data from certain CRM modules
- the permission to import data to certain CRM modules

The CRM system makes sure that a user can only exercise certain operations if the user has proper privileges assigned.



### **Important**



Note the following general rules:

- special privileges are always superior to common privileges
- revoked privileges overstrike always granted privileges
- at the CRM system there are special rules, in the following please note these special rules marked as **Important**



Thereby, the CRM system distinguishes the following privilege types:

**Table 4.1. Privilege Types at Profiles**

Global Privileges:	<p>If you create a profile, the global privileges allow you to decide whether the common privilege to view or to edit all information / modules of the CRM system is given:</p> <ul style="list-style-type: none"> <li>• <b>View all:</b> A user with a role based on a profile that allows to view all data, can view all data in the entire organization. You should not give this privilege if you want to implement restricted access rules.</li> <li>• <b>Edit all:</b> A user with a role based on a profile that allows to edit all data, can create/edit all data in the entire organisation. You should not give this privilege if you want to implement restricted access rules.</li> </ul> <p> <b>Important</b> Global privileges in profiles override the permissions defined by <b>Tab, Standard, Field and Utility Privileges</b> as they are explained below.</p>
Tab Privileges:	The option to set tab privileges allow you to decide which tabs or modules to be shown. For this purpose the CRM displays all available modules.
Field Privileges:	<p>The option to set standard privileges allow you to decide whether create or edit, delete, and view privileges are given related to the CRM modules. For this purpose the CRM displays all available modules.</p> <p> <b>Important</b> Custom fields are included. Therefore, you should have created your custom fields before starting to set field privileges.</p>
Utilities:	Numerous CRM modules come with utility functions such as import, export, merge, and convert lead. The option to set utility privileges allows you to decide whether these functions will be available for roles that are based on a specific profile.



### Important

Privileges defined by profiles override the **Default Organization Sharing Rules** and the **User defined Sharing Rules**.

For example, let us assume that the **organization sharing rule** allows a user to view the potentials of others. However, if the profile does not allow to access the potential module these access privileges are revoked.

## Definition of Groups

For better manageability, the CRM system allows to collect users, roles, roles with subordinates and user groups in groups. It is important to understand, that groups are not a tool for defining security settings. Rather user groups are used to manage the data access.



### Important

Note that the group settings overrides the profile settings. Group privileges may become restricted by custom organisation sharing privileges.

## Group of Users

The CRM system provides functions to define groups of users, sometimes called team. You may give these groups their own name and assign an unlimited number of users to one group. As an example a group called Team A is shown in [figure: Group of Users - Example](#).

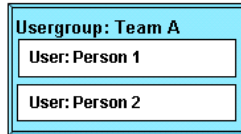


Figure 4.3. Group of Users - Example

## Group of Roles

You can also build groups which are based on roles. That might be a helpful function if you do not know the individual users and their task within you company. An example is shown in [figure: Group of Roles - Example](#).



Figure 4.4. Group of Roles - Example

In this group all users that have the role Sales or Marketing are members of this group. If you assign a data entry at the CRM system to this group, all members become owners of this entry.

## Group of Roles with Subordinates

In addition to simple role based groups you may also build groups which include subordinates. That means the users who are assigned to roles which are below a selected role, will be included. The following figures illustrate this. Let's assume your company has set up a hierarchical order as shown in [figure: Hierarchy Example](#).

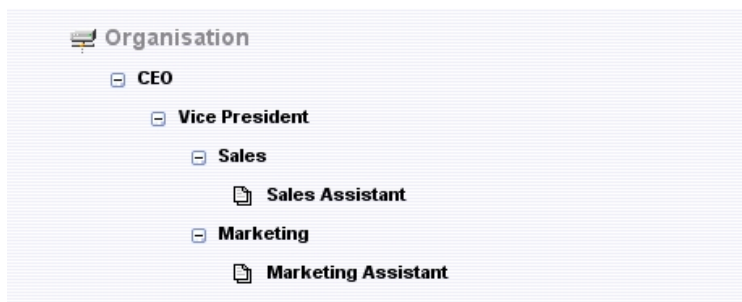


Figure 4.5. Hierarchy Example

In this figure the role Sales has a subordinated role Sales Assistant and the role Marketing is the master to the role Marketing Assistant. If you create a user group as shown in [figure: Group of Roles with Subordinates - Example](#) all users with sales and marketing related roles, including the assistants will become members of this group.



Figure 4.6. Group of Roles with Subordinates - Example

## Group of Groups

You may build groups where the members are also groups. That means, that all users who are a member of a selected group will also become members of the new group. Let's assume you want to build a hierarchy as shown in [figure:Sample Hierarchy for Groups](#). Based on these structure you may create a user group **Sales** where the groups **Team A** and **Team B** are members. At this example the **Team A** and **Team B** groups are build with users as members.

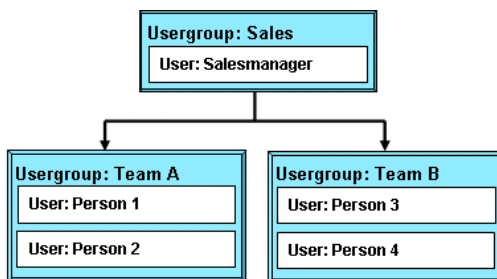


Figure 4.7. Sample Hierarchy for Groups

If you assign a CRM data entry to the group **Sales** the Persons 1 to 4 will all become the owners of this entry with all privileges.

## 4.2. CRM Administration

This section explains the administrative tasks required to manage the CRM system. It describes:

- the user administration and role based security settings,
- the configuration of standard and custom entry fields,
- the templates and the configuration of other preset tools, and
- the basic system configuration.

For users with administration privileges the CRM system displays an additional [**Settings**] button in the Navigation bar as shown in [figure: Additional Settings Button](#).

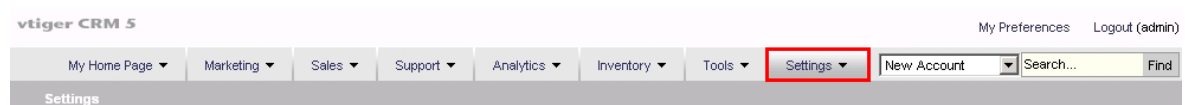


Figure 4.8. Additional Settings Button



### Tip

It is advised that only one or a very limited number of users get administration privileges.

By clicking this button a CRM configuration window will open which is only available to administrators.

## 4.2.1. User Administration

The user management functions are the core of the security management of the CRM system. They control the access to the CRM system based on the users privileges. The following sections will explain in detail the purpose of these functions and the features available. You may look up the simple organisation setup examples at the [Appendix: Administration Examples](#) or at the [Appendix: Administration FAQ](#) for further reference.

### User Administration Basics

From the organisation point of view, user administration means administration of privileges. Essentially, the use of privileges depends on the number of users and the company structure. Few users in small enterprises have few requirements for privilege administration. With an increasing number of users the complexity of the relations between the users increases and usually develops the need to assign and administer privileges.

The CRM system offers a privilege system that is based on the following simple looking rules:

- Who can see certain data?
- Who can change certain data?
- Who can delete certain data?
- Who can create certain data?

In the CRM system, privilege assignment primarily means the withdrawal of privileges. In the practical work with the CRM this is most helpful and necessary as the following examples illustrate:

- A selling co-worker would certainly not be pleased, if somebody else changed the data of customers.
- Personal information remains confidential only if other co-workers are not allowed to see it.
- The company management does not want everybody to see the revenue figures.
- Only one person is allowed to change the product or service catalogue.

Therefore, it is necessary that the user privilege assignment is truly based on business requirements as described in the following examples:

- Only the sales staff is allowed to change customer related data.
- The secretary does not get any access to revenue numbers.
- Only the product manager is allowed to change prices of services or goods offered by the company.
- Only the management is allowed to see all CRM data.
- Nobody is allowed to export any contacts.

Considering the current CRM capabilities of managing user privileges you should configure your system in the following order:

**Set the Default Organisation Wide Privileges:**

Organisation Wide Privileges should be created first. They are the basis for the privilege assignment valid for all users.

**Create Profiles:**

Profiles are the basis for the privilege assignment to users. In any organization there are usually different users with different tasks, like sales, service, secretary or CRM administrator. Depending of the user type, the privileges for accessing data and using CRM modules and functions can be assigned.

**Define Roles:**

Roles are based on profiles and linked with the hierarchical order of the company. They define the overall privileges for each individual user.

**Define Groups:**

Larger organizations may define groups to improve the usability of the CRM system.

**Create Users:**

The privileges of individual users are defined by roles. You have to assign a role to a user.



**Tip**

Never use the admin role for your daily work with CRM system. It is advised to create individual users instead. Later, if you want to delete a user, you can assign all data to a new user.

Single users do not need any privilege management. They have and need all privileges to access and to change all data stored in the CRM. Nevertheless it is helpful to know the basics of privilege assignment. This might be needed if additional users will be needed in the future.

A small number of users, who use the CRM system together, should be familiar with the simple solutions offered by the privilege assignment. This includes particular:

- To prohibit that other CRM users see confidential data.
- To prohibit that other users can delete or modify data.

In a small organization there is usually no pronounced hierarchy between co-workers. A complex privilege administration does not have to be developed. However, if it should be necessary to granulate the privileges more finely, you should begin with the use of different profiles. Each individual user may get its own profile with certain privileges.

To provide a larger number of users within an organization with different user privileges, a clear structure of the privilege assignment is necessary. It is sensible to connect user privileges with the position or tasks of each individual user or user groups.

The current CRM version supports a fine grained privilege management.

## User and Access Management

In the following sections, the management of users is explained in the order of the menu. Keep in mind that a complete user setup includes several steps in a certain order as explained in the previous sections.

## Users Configuration

To create or to manage users, click the **Users** menu to open the users list as shown in [figure: User List View](#).

**Settings > Users**  
Manage Users list who access CRM

**Users List**

#	Tools	User ID , Name & Role	Email	Phone	Admin	Status
1		<b>admin</b> Administrator (CEO)			on	Active
2		<b>Joe</b> Brown Joe (Sales Man)	test@test.com		off	Active
3		<b>standarduser</b> StandardUser (Vice President)			off	Active

Edit  
 Duplicate  
 Delete

**Figure 4.9. User List View**

This user list includes the user name, the role, the e-mail address and other details for each individual user.



### Note

The list view includes all users independent of whether they are active users or not.

You may edit or delete users at this view. If you want to delete a user click the **[Trash Icon]** at the users row.



### Important

This function deletes a user but not the users data. You will be asked who you want to assign as the new owner of the data. You cannot delete default users provided by the CRM system.

Click the users name (User ID) to open the detail view of a particular user as displayed at [figure: User Detail View](#). This view includes user master data related to the login and to the users role and other user information. User privileges are not shown. These privileges are defined by the user profiles and organisation-wide settings as it will be explained later.

1. User Login & Role		<a href="#">View Audit Trail</a>	<a href="#">Duplicate</a>	<a href="#">Edit</a>
User Name	standarduser	Admin	off	
Password	<a href="#">Change Password</a>	Email		
Status	Active	First Name		
Currency	EURO : €	Last Name	StandardUser	
Default Lead View	Today	Role	Vice President	
Default Calendar View	This Year			
2. More Information				
Title		Fax		
Department		Other Email		
Office Phone		Yahoo id		
Mobile		Reports To		
Home Phone		Other Phone		
Date Format	yyyy-mm-dd	Signature		
Notes		Internal Mail Composer	yes	
3. User Address				
Street Address		Country		
City		Postal Code		
State				
4. User Photograph				
Upload Photograph				
5. Home Page Components				<a href="#">▼</a>
6. My Groups				<a href="#">▼</a>
7. Login History				<a href="#">▼</a>

Figure 4.10. User Detail View

With the help of the buttons displayed at this view you may perform the following operations:

**view Audit Trail:**

This button opens a new window which provides detailed information on the login history. Note that this function needs to be permitted by the CRM system administrator, as explained in [section: Audit Trails](#).

**duplicate:**

This button allows you to copy user data. This is helpful if you have to configure several users with equal settings.


**edit:**

This button allows you to edit the user master data.

The entry fields at **1. User Login & Role** displayed at [figure: User Detail View](#) have the following meanings:

**Table 4.2. List of default entry fields for User Login and Role**

User Name:	Each user must get an unique and secure user name. Use at least 8 digits. User names once created cannot be changed in the edit view.
Admin Checkbox:	Check this box only if you want to create a user with administrator

	<p>privileges, independent from the role.</p> <p> <b>Warning</b></p> <p>Users with administration privileges can see and modify the settings and all user data.</p>
Password:	Each user must get a unique and secure password. Use at least 8 digits. Every user has the privilege to change his own password.
First and Last Name:	Enter the users name. The first name will be used for the welcome message. If you do not enter a first name, the last name will be used for the welcome message.
Role:	As explained before, roles define the privileges for a user. A role must be assigned to each individual user and must be created before. You may find additional information in <a href="#">section: User Roles</a> .
Email:	Enter the e-mail address of this user. This address will be used by the CRM for outgoing e-mails.
Status:	You may set a user as active or inactive. Inactive users are not allowed to login.
Default Activity View:	Here you can set the default activity view and decide how activities are presented to the user at the home page.
Default Lead View:	Here you can set the default lead view and decide how leads are presented to the user at the home page.
Currency:	You may set the currency for this user here. Note that the currencies used by the CRM system are defined by the currency settings menu.



### Important

User name and passwords have to be a combination of small or capital letters and numbers. It is recommended that you use at least 8 digits. The more digits you have, the more secure is the CRM access. The use of special characters such as "-", "/", or umlaut (such as ä, ö, ü or ß) as they are used in other languages as well as names with empty spaces or apostrophe are not allowed.

You may add further information at the **2. More Information** section:

**Table 4.3. List of default entry fields for User More Information**

Title, Department:	You may enter the name of the position the user has in the company, and his department.
Reports to:	You may select the supervisor of the user. Note that this is only a reference and does not influence the security settings.
Other Email:	You may enter an additional e-mail address for this particular user.
Yahoo Id:	You may enter a Yahoo ID for this user. This ID might be used as an additional option when sending e-mails.
Signature:	You may enter an e-mail signature. This signature will be added to every e-mail which is send by the CRM automatically.
Office Phone, Mobile, Other, Fax, Home Phone:	You may enter additional contact information for this user.
Date Format:	You may change the date format for this user.
Notes:	You may enter additional information related to this user.
Internal Mail Composer:	This controls which mail program is used if you click on an e-mail address. The default value is <b>yes</b> and this means that the CRM mail client is used. If you change it to <b>no</b> , the mail client installed on your computer is used for composing an e-mail.



Use the **3. Address Information** section to enter the users address information. At **4. User Image Information** you may store a photo of this user. At **5. Home Page Components** you decide what will be displayed at the CRM Home page of a particular user. Click **Hide** or **Show** to make your selection.

The entries at **6. My Groups** and **7. Login History** are for information only. They cannot be edited. **My Groups** displays the group membership of a particular user. The **Login History** displays when a user has accessed the CRM system.



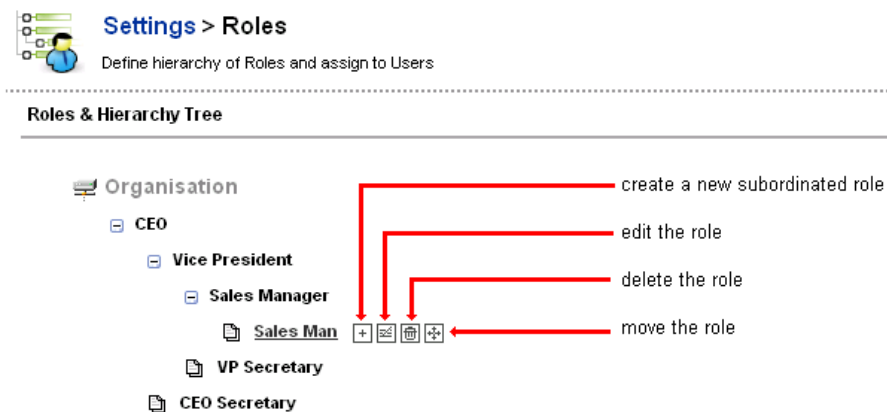
### Note

User information is not visible to other users.

If you create a new user, note that an automatic e-mail will be sent to this user with the login data. It is advisable to inform a prospect user in advance about the purpose of this e-mail.

## User Roles

The term Roles and their functions have been explained in [section: Definition of Roles](#). Click the **Roles** menu to open the hierarchical role view as shown in [figure: Company Hierarchy Example](#).



**Figure 4.11. Company Hierarchy Example**

At this menu you are offered to add, edit, delete or move roles. Move your computer mouse pointer over a role entry. You will see a set of icons that allows you to perform these operations.

The "Add" function creates a new role which is located in the hierarchical order one level below an existing role. [figure: Role - Edit View](#) displays a sample for an edit view of an existing or new role. You have to give the role an unique name and to decide which profiles will be associated with a particular role. Furthermore, the superior role will be displayed.

**Settings > Roles > Editing "Sales Man"**  
Editing Properties of "Sales Man" Role

**Properties of "Sales Man"** Save Cancel

**Role Name** Sales Man

**Reports to** Sales Manager

**Profile**

**Profiles Available**

Members

- Administrator
- Sales Profile
- Support Profile
- Guest Profile

**Assigned Profiles**

Members of "Sales Man"

- Sales Profile

Figure 4.12. Role - Edit View

**Note**

Users at any given role can always view, edit, delete all data owned by users below in the hierarchy.

**Profiles**

All roles are based on profiles as explained in [section: Definition of Profiles](#). With profiles you set the user privileges to access, change or delete data.

**Important**

Please note the special rules that apply to profiles in relation to other security settings as described in [section: Definition of Profiles](#).

Click the **Profiles** menu to open the list view of your profiles as shown in [figure: Profiles - List View](#). Here you see a list of all profiles that have been defined in your CRM system. The CRM systems comes with a set of pre-defined profiles which you can use and change but not delete.

**Settings > Profiles**  
Manage user-specific modules access to different Roles

**Profiles List** Total : 4 Profiles New Profile

#	Tools	Profile Name	Description
1		<b>Administrator</b>	Admin Profile
2		<b>Sales Profile</b>	Profile Related to Sales
3		<b>Support Profile</b>	Profile Related to Support
4		<b>Guest Profile</b>	Guest Profile for Test Users

Figure 4.13. Profiles - List View

Click the name of a profile to see the details. The privilege setting terms have already been explained in [section: Definition of Profiles](#). You may change the profile by clicking the **[Edit]** button.

To create a new profile click the **[New Profile]** button at the list view. Follow the instructions provided:

**Step One:**

Give the profile an unique name and a description. Select whether you want to use an existing profile as a template. It is recommended to use this option. Click [**Next**] to continue.

**Figure 4.14. New Profile - Step 1**

**Step Two:**

The menu for step two is displayed in [figure: New Profile - Step 2](#). At this step you configure the access privileges for all modules. First you might select at the **Global Privileges** entry fields whether the profile allows to view or to edit all data.

**Figure 4.15. New Profile - Step 2**

Then you can configure the profile related access privileges for each individual CRM module. You may select Create/Edit, View and Delete privileges as well as the fields to be displayed in each module. Click [**Finish**] to save your profile at the CRM system.

**Important**

Please note that the settings of the **Global Privileges** are always superior to the other privilege settings.

Note that a new profile always has a parent but can be edited independent. At [Appendix: Administration Examples](#) you will find samples for profile configurations.

**Important**

The CRM system uses profiles in relation to the access privileges to modules and fields as described in [section: Sharing Access](#) and [section: Default Organization Fields Access](#).

**Groups**

Groups are a very effective tool in order to summarize users and privileges as explained in [section: Definition of Groups](#). Any type of relationship can be used to form a group, such as:

- users at the same location
- users with a common task
- user at the same department
- users with the same working history
- users with the same interests

Click the **Groups** menu to open the list view as shown in [figure: Groups - List View](#). You see a list of all existing groups.

**Settings > Groups**

Manage different types of user groups within your organization

Groups List		Total : 1 Group	
#	Tools	Group Name	Description
1		<b>Team Selling</b>	Group Related to Sales

**Figure 4.16. Groups - List View**

Click the name of a group to get the details as shown exemplary in [figure: Group - Detail View](#). The detail view lists the name, the description and the current users who are members of this group. You may change the group settings by clicking the **[Edit]** button.

Properties of "Team Selling" <span style="float: right;">Edit</span>	
Group Name	Team Selling
Description	Group Related to Sales
Members	<b>Roles</b> Sales Manager
	<b>Role and Subordinates</b> Sales Man
	<b>Users</b> standarduser

Figure 4.17. Group - Detail View

To create a new group click the **[Create New Group]** button at the list view. The new entry window as shown in [figure: Group - Edit View](#) allows you to define the conditions for a group.

Properties of "Team Selling" <span style="float: right;">Save Cancel</span>	
*Group Name	Team Selling
Description	Group Related to Sales
<b>Members</b>	
<b>Available Entities &amp; Members</b> Entity: Groups Members of Entity Group::Marketing Group Group::Support Group	<b>Selected Members</b> Members of "Team Selling" Roles::Sales Manager RoleAndSubordinates::Sales Man User::standarduser

Figure 4.18. Group - Edit View

First, give the group a name and provide a short description. Then select the criteria for a membership of this group. The filter function as well as the search function allows you to select members quickly. As explained in [section: Definition of Groups](#), you may chose users, roles, roles and subordinates as well as other groups as group members.

Click **[Save]** to store you new group in the CRM system. The assignment of a user to a group will also be displayed at the users detail view as shown in [figure: User Detail View](#).

## Sharing Access

The CRM system allows you to set default privileges that are valid organisation-wide. It is the purpose of this type of privilege to give an administrator tools that allow a fast overall security setting.



### Important

Profiles always override the organisation wide sharing privileges!

The **Sharing Access** privileges include **Global Access Privileges** and **Custom Access Privileges**. By default the sharing access settings allow all users to use all CRM features if not limited by profiles. In most cases there is no need to change this. However, if necessary you can restrict the access to individual modules within your organization.



## Important

If you make changes to the sharing rules you must hit the **[Recalculate]** button to make your changes valid! Beware, based on the number of users and the sharing rules, the recalculate procedure may last a couple of minutes.

Goto the **Sharing Access** menu to get an overview about the settings. The CRM system comes with default **Global Access Privileges** for the most important CRM modules as shown in [figure: Global Access Privileges - List View](#). These privileges control the data sharing at organization level.



### Settings > Sharing Access

Manage module sharing rules & custom sharing rules

1. Organization-level Sharing Rules		Recalculate	Change Privileges
<b>Potentials</b>	★ Public: Read, Create/Edit, Delete	Users can Read, Create/Edit, Delete other users Potentials	
<b>Accounts &amp; Contacts</b>	★ Public: Read, Create/Edit, Delete	Users can Read, Create/Edit, Delete other users Accounts & Contacts	
<b>Leads</b>	★ Public: Read, Create/Edit, Delete	Users can Read, Create/Edit, Delete other users Leads	
<b>Calendar</b>	★ Private	Users cannot access other users Calendar	
<b>Trouble Tickets</b>	★ Public: Read, Create/Edit, Delete	Users can Read, Create/Edit, Delete other users Trouble Tickets	
<b>Quotes</b>	★ Public: Read, Create/Edit, Delete	Users can Read, Create/Edit, Delete other users Quotes	
<b>Purchase Orders</b>	★ Public: Read, Create/Edit, Delete	Users can Read, Create/Edit, Delete other users Purchase Orders	
<b>Sales Orders</b>	★ Public: Read, Create/Edit, Delete	Users can Read, Create/Edit, Delete other users Sales Orders	
<b>Invoices</b>	★ Public: Read, Create/Edit, Delete	Users can Read, Create/Edit, Delete other users Invoices	
<b>Campaigns</b>	★ Public: Read, Create/Edit, Delete	Users can Read, Create/Edit, Delete other users Campaigns	

Figure 4.19. Global Access Privileges - List View

The following sharing permission types can be set :

Table 4.4. Sharing Permission Types

Type	Description
Private	Only the record owner, and users with a role which is above that of the record owner's role in the hierarchy, can browse, edit, delete and report on those records. That means by default a specific user can view only the data sets that are owned by the user, owned by a group where the user is a member, owned by subordinate users, or shared to the user
Public Read Only	All users can view and report on records but not edit them. Only the owner, and users with a role which is above that of the record owner's role in the hierarchy, can edit or delete those records.
Public Read/Write	All users can view, edit all records. Only the owner, and users with a role which is above that of the record owners role in the hierarchy, can delete those records.
Public Read/Write/Delete	All users can view, edit and delete all records.

**Important**

Please note the following rules:

- Default organization sharing privileges are overridden by profile settings.
- For the activities module the default organization sharing privilege value is set to the fixed value **Private** and cannot be altered.
- Regardless of the organization-wide defaults, users can always view and edit all data owned by or shared with users below them in the role hierarchy if not prohibited by the profile.
- When an account has been set to **Private**, the access to related potentials, tickets, quotes, sales orders, purchase orders, and invoices is also set to private. You must have at least read access to a record to be able to add activities or other associated records to it.

**Note**

You cannot change the calendar access privileges here. You may configure the sharing access at the calendar settings menu as described in [section: Calendar Sharing](#).

In addition, you may create user defined sharing rules set by **Custom Sharing Rules**. These functions allow the administrators to selectively grant data access to a set of users.

Custom data sharing rules can be created to share module related data between the following entities:

- From Role to Role
- From Role to Role with Subordinates
- From Role to Group
- From Role with Subordinates to Role
- From Role with Subordinates to Role with Subordinates
- From Role with Subordinates to Groups
- From Group to Role
- From Group to Role with Subordinates
- From Group to Group

Sharing Rules can be created for the following modules:

**Table 4.5. Sharing Rules for Modules**

Leads Sharing Rules:	Leads owned by the users of a given Role/Role Subordinates/Group can be shared with users of a another Role/Role Subordinates/Group with Read Only or Read/Write permission. E-mails related to a lead will also be shared with Read Only or Read/Write permission.
Accounts Sharing Rules:	Accounts owned by the users of a given Role/Role Subordinates/Group can be shared with users of a Role/Role Subordinates/Group with Read Only or Read/Write permission. E-mails related to a account will also be shared with Read Only or Read/Write permission.

Potentials Sharing Rules:	<p>Potentials owned by the users of a given Role/Role Subordinates/Group can be shared with users of a Role/Role Subordinates/Group with Read Only or Read/Write permission.</p> <p>Quotes and Sales Order related to a potential will also be shared with Read Only or Read/Write permission.</p>
Trouble Tickets Sharing Rules:	Tickets owned by the users of a given Role/Role Subordinates/Group can be shared with users of a Role/Role Subordinates/Group with Read Only or Read/Write permission.
Email Sharing Rules:	E-mails owned by the users of a given Role/Role Subordinates/Group can be shared with users of a Role/Role Subordinates/Group with Read Only or Read/Write permission.
Quotes Sharing Rules:	<p>Quotes owned by the users of a given Role/Role Subordinates/Group can be shared with users of a Role/Role Subordinates/Group with Read Only or Read/Write permission.</p> <p>Sales Orders related to a quote will also be shared with Read Only or Read/Write permission.</p>
Purchase Order Sharing Rules:	Purchase Orders owned by the users of a given Role/Role Subordinates/Group can be shared with users of a Role/Role Subordinates/Group with Read Only or Read/Write permission.
Sales Order Sharing Rules:	<p>Sales Order owned by the users of a given Role/Role Subordinates/Group can be shared with users of a Role/Role Subordinates/Group with Read Only or Read/Write permission.</p> <p>Invoices related to a sales order will also be shared with Read Only or Read/Write permission.</p>
Invoice Sharing Rules:	Invoices owned by the users of a given Role/Role Subordinates/Group can be shared with users of a Role/Role Subordinates/Group with Read Only or Read/Write permission.



### Important

Sharing Rules created for the Accounts module will automatically apply to the Contacts module.



### Important

Please note the following general sharing rules:

- Custom Sharing Rules can only extend the visibility, but they cannot hide it.
- Sharing Rules cannot be specified to share data between two users. (If you want to do this, please refer to [Appendix: Example II.](#))
- Sharing rules apply to all existing data and the data which will be added in future.
- The number of sharing rules which can be defined for a single Role, Role Subordinates or Group is not limited.

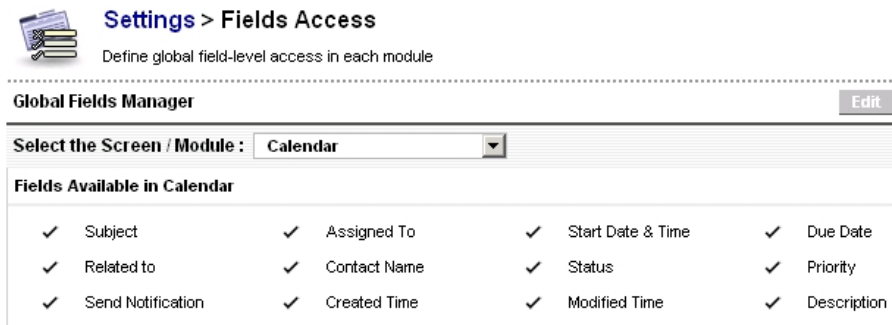
## Fields Access

The function available at the default organization **Field Access** menu is used to control the visibility of fields in various modules for the entire organization. You can use this function to either show or hide entry fields to



the entire organization.

By default the CRM is configured as to display all master data which are provided in the CRM system. As an example, in [figure: Fields Manager for Calendar](#) you see the default fields for the calendar. If you want to restrict access to specific fields, you can edit and change the settings for each individual CRM model.



**Figure 4.20. Fields Manager for Calendar**



### Tip

Default field access settings include custom fields you may have created before.

Default field privileges can be defined for the following modules: Leads, Accounts, Contacts, Potentials, Calendar, Trouble Tickets, FAQ, Price Books, Purchase Order, Invoice, Notes, Emails, Products, Vendors, Quotes, and Sales Orders.



### Important

Please note the following rules:

- It is not possible to disable the mandatory fields in the modules.
- Default Organization field access overrides the profile level field access.

For example, let us assume a profile allows to view the website field in leads. However, if this field has not been enabled at the organization level field access settings it will not be displayed.

## Audit Trails

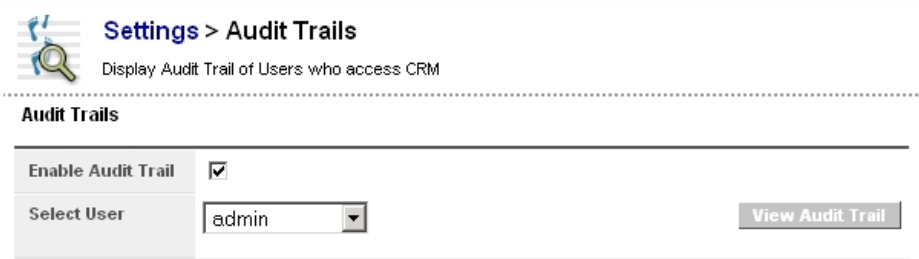
You may want to know what a particular user has been done in the CRM system. For this type of audit open the **Audit Trail Information** menu.



### Important

Please check the legal regulations in your country or your company procedures before you start an audit trail. In some countries or companies it is illegal to log user data without letting the users know that you are collecting such information.

In [figure: Audit Trail - Configuration Menu](#) you see the audit trail configuration menu.



**Settings > Audit Trails**  
Display Audit Trail of Users who access CRM

**Audit Trails**

Enable Audit Trail

Select User: admin

**Figure 4.21. Audit Trail - Configuration Menu**

To configure a audit trail for a particular user, select a user name at the drop down menu and mark the check box. Immediately you will see a display message that indicates that the audit trail has been enabled.

To see the collected data, select the user's name and click the [**View Audit Trail**] button. A new window will open which displays the collected data, as shown in [figure: Audit Trail - Report](#).

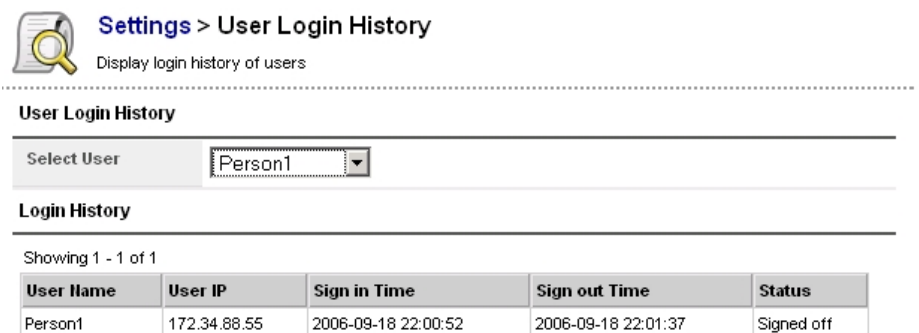
Audit Trails			
Module	Action	Record ID	Action Date
Users	UsersAjax		2006-09-23 11:14:52
Users	AuditTrailList		2006-09-23 11:14:41
Settings	index		2006-09-23 11:14:31

**Figure 4.22. Audit Trail - Report**

You may stop an audit trail by removing the check box mark for a particular user. Immediately you will see a display message that indicates that the audit trail has been disabled. Note that the audit trail function might slow down the CRM system.

## User Login History

As CRM system administrator you may want to know who has accessed the system. At this menu you may get the login history for each individual user. Open the menu and select a user then you will see the login details, as illustrated in [figure: Users Login History](#). Note that the login date and time are always displayed. The logout data are only available if a user used the logout button.



**Settings > User Login History**  
Display login history of users

**User Login History**

Select User: Person1

**Login History**

Showing 1 - 1 of 1

User Name	User IP	Sign in Time	Sign out Time	Status
Person1	172.34.88.55	2006-09-18 22:00:52	2006-09-18 22:01:37	Signed off

**Figure 4.23. User Login History**

## 4.2.2. Studio

The studio allows you to customize your master data and to modify the content of the pick lists in each individual module as explained in the following sections.

### Custom Fields

You may configure your own entry fields for most of the CRM modules. If you want to create such custom fields go to the **Custom Fields** menu. Depending on the CRM module selected, the menu displays the existing custom fields. [figure: Custom Fields - List View](#) displays, for instance, the content for accounts.

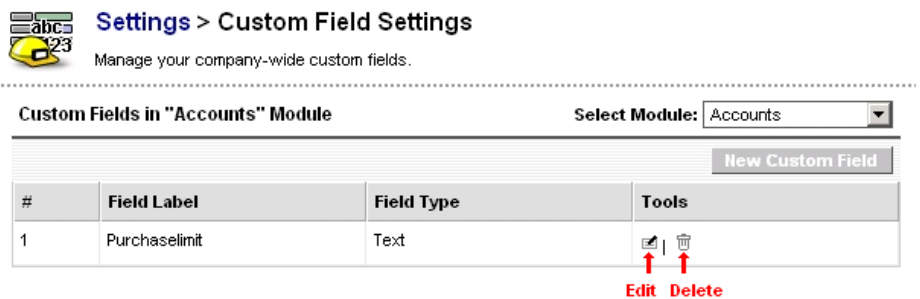


Figure 4.24. Custom Fields - List View

To create a new custom field, select the desired CRM module first. You may add a new custom field to the selected module by clicking the [New Custom Field] button. A new window will open as displayed in [figure: Custom Field Definition](#).

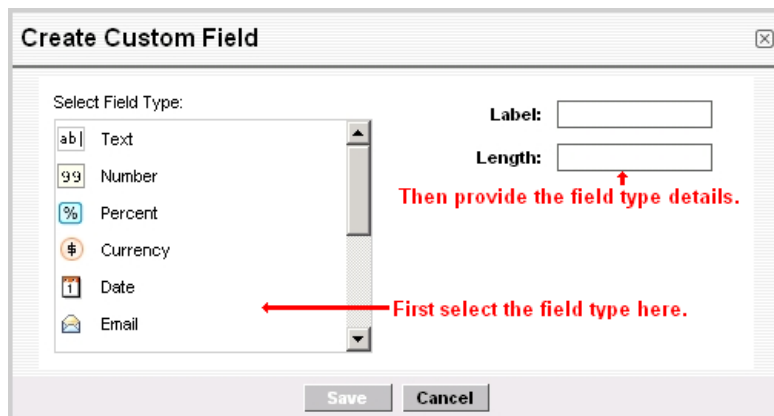


Figure 4.25. Custom Field Definition

Now you have to select the data format first. The CRM offers you the following options. Make sure that each custom field gets a unique name.

Table 4.6. Custom Field Types

Type	Content
Text	[Length:] Enter the maximum number of characters, e.g. 10 for ten characters.
Number	[Length:] Enter the maximum number of digits, e.g. 10 for ten digits; [Decimal Places]: Enter the number of decimal places you want to have, e.g. 0 has no decimal places, 1 creates one decimal place, like 55.4 and so on.

Percent	[Length:] Enter the maximum number of digits, e.g. 3 for three digits; [Decimal Places]: Enter the number of decimal places you want to have, e.g. 0 has no decimal places, 1 creates one decimal place, like 55.4 and so on.
Currency	[Length:] Enter the maximum number of digits, e.g. 6 for six digits; [Decimal Places]: Enter the number of decimal places you want to have, e.g. 0 has no decimal places, 1 creates one decimal place, like 55.4 and so on.
Date	Just give the field a name.
Email	Just give the field a name.
Phone	Just give the field a name.
Pick List	You may create this pick list by using a new line for each entry.
URL	Just give the field a name.
Check Box	Here you may define a check box (yes/no). Just give the field a name.
Text Area	This is a field where you may enter up to 255 characters of text.
Multi-Select Combo Box	You may create a list by using a new line for each entry. In contrast to the Pick List you will be able to select multiple entries at once.
Skype	You may use this custom field to link the CRM System with the Skype application running at your client computer. Just give this field a unique name. At your edit view of the related CRM module you may enter a Skype ID or a phone number. For more information about Skype look at <a href="http://www.skype.com">http://www.skype.com</a> .



### Tip

You should write down your content selection for further references. You will need this if you want to convert leads to sales potentials as described in the following section.

## Custom Fields for Leads

Custom fields for leads are special. You may decide what will be done with the content stored in these fields if you convert a lead to a sales potential. You may drop these information or transfer the content of these fields to corresponding custom fields at potentials, accounts or contacts.

You should adopt the following procedure to prepare the transfer of custom fields from leads for further use:

1. Create custom fields for potentials, accounts or contacts in reference to custom fields in leads. E.g., if you have created a custom field **account number** for leads, you should create a custom fields for potentials, called **account No**. It is recommended not to use the same name.



### Caution

The format of the custom fields in leads and the corresponding custom fields in potentials, accounts, or contacts must be absolutely identical!

2. Open the leads module at **Studio>Custom Fields>Leads Module**.
3. Click the [**Custom Field Mapping**] button (only displayed for Leads). A new window will open as shown in [figure: Map Lead Custom Fields](#).

**Settings > Custom Field Settings**  
Manage your company-wide custom fields.

Editing Field Mapping

Save Cancel

#	Field Label	Field Type	Mapping with other Modules		
			Accounts	Contacts	Potentials
1	Limit	Number	[-None-]	Purchaselimit	[-None-]

**Figure 4.26. Map Lead Custom Fields**

- All custom fields created for leads are displayed. Select the mapping to the corresponding fields in contacts, accounts or potentials you want to have. In the sample display of [figure: Map Lead Custom Fields](#), you see that the Contact custom field **Purchaselimit** has been assigned to the **Limit** field of Leads. Click [Save] to transfer your settings to the CRM system.

When finished the mapped custom fields are linked and will be used when you convert a lead into a potential as described in [section: Creating Potentials from Leads](#).

## Picklist Editor

Picklists are drop down menus which are offered to you at the edit or ajax view of several CRM modules. This menu allows you to define the content of the pick lists based on the roles. Click the **Picklist Editor** menu to get an overview about the CRM modules which have pick lists included, as shown in [figure: Studio Picklist Editor](#).

**Settings > Picklist Editor**  
Customize Picklist values in each module

1. Select Module & Role

Select Role: CEO Select CRM Module: Events

Global Delete: Status Delete

2. Picklists Available in Events

Status	Edit	Priority	Edit
Planned		High	
Held		Medium	
Not Held		Low	

**Figure 4.27. Studio Picklist Editor**

With version 5.0.4 role based pick lists have been introduced. That means that the content of the pick list for each individual (non admin) user depends on the role which has been assigned. You may use this feature for instance to create pick lists in different languages or to restrict the users access to certain entries.

To modify the pick list content, select a role first and choose a corresponding CRM module. The display of the available pick lists will change accordingly. (Note that after a fresh installation all entries for all roles are equal.) To change the content of a pick list click [Edit]. At the new window which pops up you may make your changes.

You may change the applying role while you are in the edit view. If you want to modify the same pick list for another role just hit the [Select the parent role] button and switch to another role.

**Important**

Some content of the pick lists cannot be changed. This content is defined by the system settings. Please contact your CRM system provider if the offered content does not fit your needs.

**Note**

At the edit and detail view of the CRM modules the content of the pick lists is displayed in alphabetical order. A user with admin privileges always sees all picklist entries, independent of its role assignment. If a pick list entry has been assigned that is not accessible by the role of the current user a message "not accessible" will be displayed.

Click [**Save**] to transfer your changes to the CRM system.

### 4.2.3. Communication Templates

Communication templates intend to help you to work with the CRM more efficiently. The CRM allows you to create and to use templates for mails and documents, to set automatic notifications for special events and to manage your inventory. The following sections explain the details.

#### E-mail Templates

If you use the CRM for sending standard e-mails frequently it is most helpful to have such e-mails available as template. To see any existing e-mail template list, click the **E-mail Templates** menu. The CRM comes with templates as listed in [figure: Email Templates - List View](#). You may modify existing templates or create an unlimited number of new templates. Note that there are public and private templates. Public templates are available to all CRM users. Private templates are only used by particular users.

**Settings > Email Templates**

Manage email templates used for Campaigns and Mass mailing

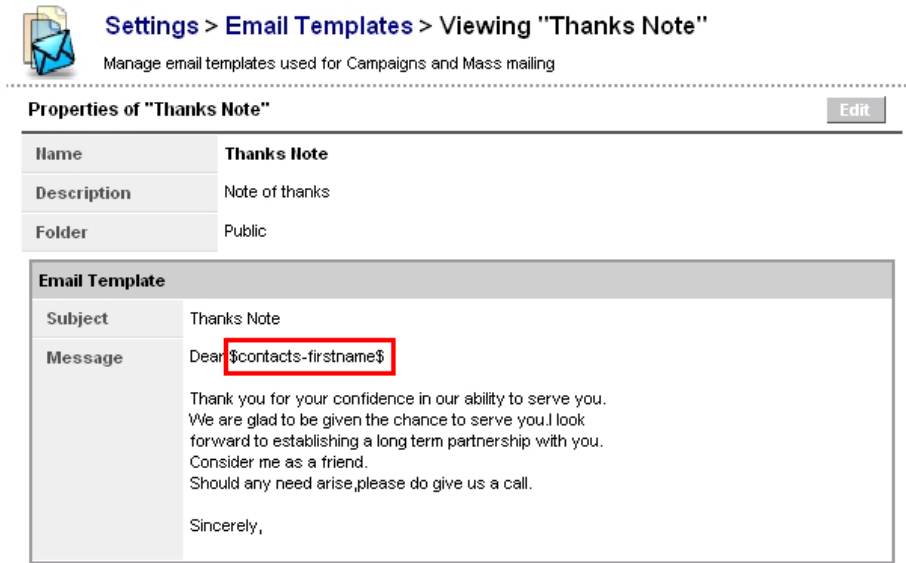
**Email Templates**

Delete		New Template		
#	Select	Email Template	Description	Tools
1	<input type="checkbox"/>	<b>Thanks Note</b>	Note of thanks	View Sample Email
2	<input type="checkbox"/>	<b>Target Crossed!</b>	Fantastic Sales Spreel	View Sample Email
3	<input type="checkbox"/>	<b>Follow Up</b>	Follow Up of meeting	View Sample Email
4	<input type="checkbox"/>	<b>Address Change</b>	Address Change	View Sample Email
5	<input type="checkbox"/>	<b>Accept Order</b>	Acknowledgement/Acceptance of Order	View Sample Email
6	<input type="checkbox"/>	<b>Goods received acknowledgement</b>	Acknowledged Receipt of Goods	View Sample Email
7	<input type="checkbox"/>	<b>Acceptance Proposal</b>	Acceptance of Proposal	View Sample Email
8	<input type="checkbox"/>	<b>Pending Invoices</b>	Payment Due	View Sample Email
9	<input type="checkbox"/>	<b>Announcement for Release</b>	Announcement of a release	View Sample Email

**Figure 4.28. Email Templates - List View**

Click [**View Sample Email**] to see the detail view of an existing template as shown in [figure: Email Template - Detail View](#). Note the merge field values highlighted in this illustration. Merge field values are used to

dynamically include data from your CRM into the mail. In this example mail, the merge field value `$contacts_firstname` represents the first name of a contact. The other merge field values are related to the user who sends the e-mail.



**Settings > Email Templates > Viewing "Thanks Note"**  
Manage email templates used for Campaigns and Mass mailing

**Properties of "Thanks Note"** Edit

Name	Thanks Note
Description	Note of thanks
Folder	Public

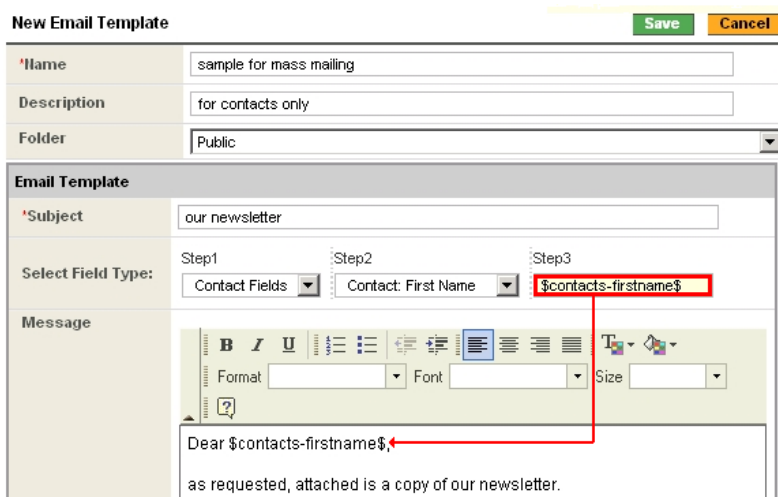
**Email Template**

Subject	Thanks Note
Message	Dear <code>\$contacts_firstname</code>  Thank you for your confidence in our ability to serve you. We are glad to be given the chance to serve you. I look forward to establishing a long term partnership with you. Consider me as a friend. Should any need arise, please do give us a call.  Sincerely,

Figure 4.29. Email Template - Detail View

You may include dynamic merge fields into your template at the edit view as shown in [figure: Email Template Edit - View](#). The merge field dialog supports you for defining the merge field syntax. Use the copy and past to enter the field codes. You must fill in all mandatory fields.

All e-mails are sent in the HTML format. You may use the HTML editor functions to design a special layout. You may also include HTML code which has been created by an external editor. But be careful and test your results, not all HTML code options are supported.



**New Email Template** Save Cancel

Name: sample for mass mailing  
Description: for contacts only  
Folder: Public

**Email Template**

Subject: our newsletter

Select Field Type: Step1: Contact Fields, Step2: Contact: First Name, Step3: `$contacts_firstname`

Message:   
 [Rich Text Editor]  
 Dear `$contacts_firstname`,  
 as requested, attached is a copy of our newsletter.

Figure 4.30. Email Template - Edit View



### Tip

You may clone templates. Edit an existing template and store it under a different name.

Click [**Save**] to transfer your template to the CRM system.

## Mail Merge Templates

The CRM system allows you to use the stored data to be merged with your MS Word application at your office environment. This is very helpful if you frequently have to write letters, quotes or other standard documents .



### Important

Mail merge templates have to be created at our office environment first. You will need the MS Office plugin provided with the CRM system. Please refer to [Appendix: Ressources](#) for further details.

To upload a template to the CRM system click the [**Add Template**] button at the **Mail Merge Template** menu as shown in [figure: Mail Merge Template - List View](#). At this menu you see a list of all existing templates and you can mark and delete templates you do not need anymore.

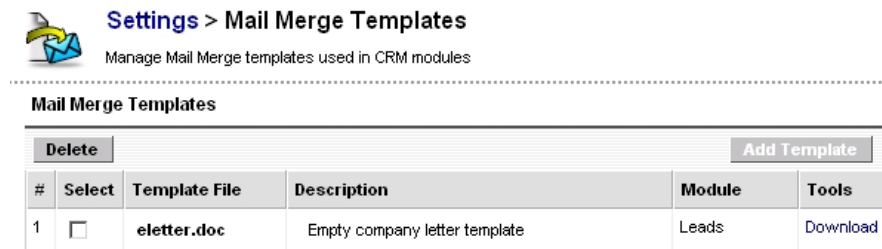


Figure 4.31. Mail Merge Template - List View

The edit view for new templates is shown in [figure: Mail Merge Template - Edit View](#). At this view you should provide a short description and select whether this template applies to Leads, Accounts, Contacts or Trouble Tickets . Then you have to provide the location of the template on your computer or network. Click [**Save**] to transfer your template to the CRM system.

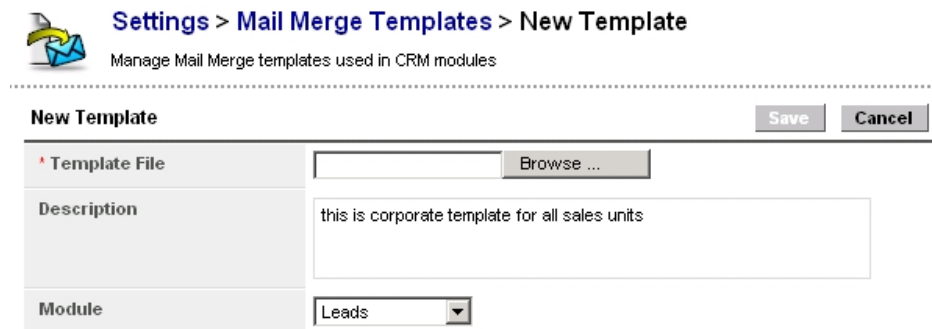


Figure 4.32. Mail Merge Template - Edit View

## Notification Scheduler

The CRM may automatically send notifications on special events by e-mails . Click the **Notification Schedulers** menu to see the status of the notification scheduler and all message types as shown in [figure: Notification Schedulers - List View](#).





### Settings > Notification Schedulers

Manage Notifications that will alert in case of important actions

Notification Schedulers				
#	Notification	Description	Status	Tool
1	Delayed Task Notification	Notify when a task is delayed beyond 24 hrs	Active	
2	Big Deal Notification	Notify on completion of big deal	Active	
3	Pending Tickets Notification	Notify for getting attention to status of tickets which are pending	Active	
4	Too many tickets Notification	Notify when a particular entity is allocated too many tickets, might reflect Service Level commitments	Active	
5	Support Start Notification	Notify stating the start of support/service	Active	
6	Support End Notification before a week	Notify before one week when support is about to end	Active	
7	Support End Notification before a month	Notify before one month when support is about to end	Active	
8	Event Reminder Notification	Notify before an event to occur based on the reminder set	Active	

Figure 4.33. Notification Schedulers - List View



### Note

At the current release the CRM administrator cannot modify the causes for notifications. The big deal notification is set to the value of 10,000 of your currency. You should contact your software provider if you want to have this changed. This provider may also help you to configure the threshold values for Delayed Tasks and Pending Tickets. Too many tickets are related to a particular account, and Support Starting & Ending dates to customers.

Use the **[Tool]** icon to activate or to deactivate a notification and to determine the content of a notification. All active notifications will be sent as e-mails if the conditions are met. They will be sent to the owner of a particular contact, potential or ticket. The messages about the upcoming end of an support case are sent to the owner of the module as explained in [section: Module Owners](#).

## Inventory Notifications

You may use the CRM system for automatic notifications to the inventory manager if certain conditions occur. Click the **Inventory Notification** menu or look at [figure: Inventory Notifications](#) for a description of these conditions.

Note that you can assign the product handler for individual goods or services at the product catalogue as described in [section: Product Related Entries](#). You can determine which messages will be sent to the buying agent of your company. Click the **[Tools]** icon related to a notification to make modifications.



### Settings > Inventory Notifications

Change Settings of Inventory related Notifications

Inventory Notifications			
#	Notification	Description	Tools
1	Product Stock Notification during Invoice Generation	When the product stock level goes below the re-order level, notification will be sent to the product handler	
2	Product Stock Notification during Quote Generation	During quote generation if the product stock in warehouse is lesser than the quantity mentioned in quote then this notification will be sent to the product handler	
3	Product Stock Notification during Sales Order Generation	During sales order generation if the product stock in warehouse is lesser than the quantity mentioned in sales order then this notification will be sent to the product handler	

Figure 4.34. Inventory Notifications

## Inventory Terms & Conditions

You may store your default company terms and conditions in the CRM. Click **[Edit]** at the **Inventory Terms & Conditions** menu to open the edit view as shown in [figure: Inventory Terms & Conditions - Detail View](#).

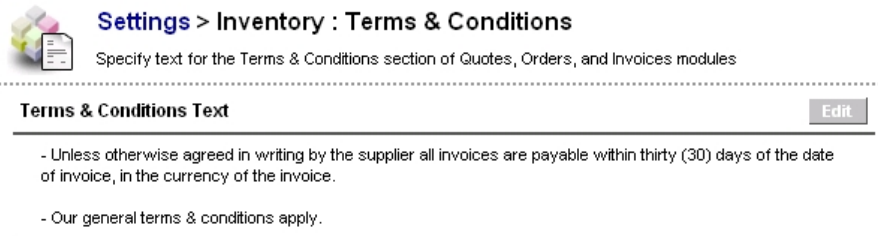


Figure 4.35. Inventory Terms &amp; Conditions - Detail View



### Note

The space available is limited to 255 characters.

Enter your information. Click **[Save]** to transfer the information to the CRM. These terms and conditions will be available as default entries whenever you create a new quote, order or invoice.

## 4.2.4. Other Settings

With the help of the configuration functions you may specify your company information, configure the outgoing mail server, your backup access, and your default currencies.

### Company Details


If you use the CRM to create PDF outputs for your quotes, orders or invoices you must define the company information.



### Important

The CRM system uses the company information for creating PDF output. If this information is not available at the time you create a PDF, an error message will be presented.


At the **Company Details** menu click the **[Edit]** button to enter company information as shown in [figure: Company Information - Detail View](#). You have to fill in all entry fields.



**Settings > Company Details**  
Specify business address of your company

---

**Company Details**

Company Name	vtiger
Company Logo	
Address	40-41-42, Sivasundar Apartments, Flat D-II, Shastri Street, Velachery
City	Chennai
State	Tamil Nadu
Postal Code	600 042
Country	India
Phone	+91-44-5202-1990
Fax	+91-44-5202-1990
Website	www.vtiger.com

**Figure 4.36. Company Information - Detail View**

Make sure that the size of your company logo meets the space available at the PDF outputs. The logo must be provided in the \*.png or \*.jpg file format. The recommended size is about 150x60 pixel.

## Outgoing Server


If you want to send e-mails from the CRM system or if you want to receive notifications, you must configure the outgoing mail server.



### Tip

All CRM user will use the same outgoing mail server. If a user sends an e-mail by using the CRM, the user's e-mail address as defined for each individual user at the users settings will be used automatically as the sending e-mail address.

Click **[Edit]** of the **Outgoing Server** menu to enter your mail server configuration as shown in [figure: Outgoing Mail Server Configuration - Edit View](#). Ask your service provider for the access data. Make sure that the server can be reached by the CRM system.



**Settings > Outgoing Server**  
Configure your Outgoing Mail Server details

---

**Mail Server Settings (SMTP)**

Server Name	<input type="text" value="smtp.at.demo.com"/>
User Name	<input type="text" value="demouser"/>
Password	<input type="password" value="*****"/>
Requires Authentication?	<input checked="" type="checkbox"/>

**Figure 4.37. Outgoing Mail Server Configuration - Edit View**



### Important

Your outgoing mail server must be accessible from the Internet.

## Backup Server

The CRM system allows you to make a backup of the database at your own FTP server. If configured, the CRM will make a backup of all data every time the **admin** user logs out. Every backup will create a new file at the backup server. Make sure you have enough disk space available. The names of these files are created automatically in the following format: "backup-<date>-<time>.sql".



### Important

If the a admin user wants to quit, he has to log out properly to start the backup procedure.



### Tip

Depending on the speed of your access line to the FTP server, a backup of the full data base might slow down your logout procedure. If you do not need such frequent backups, check with your CRM system provider for other backup procedures.

Click the **[Edit]** button at the **Backup Server** menu to enter your server data as shown in [figure: FTP Server Configuration - Detail View](#). Ask your FTP service provider for the access data. You may switch the backup on and off by marking the check box.

**Settings > Backup Server**  
Manage your Backup Server

---

**Backup Server**

Enable Backup Server

Backup Server (FTP) Edit Clear Data

Server Address

User Name

Password

**Figure 4.38. FTP Server Configuration - Detail View**

Click **[Save]** to transfer your configuration to the CRM system.

## Module Owners

Each CRM module has an owner. By default this owner is the user **admin**. At the current release, this function is only working for the trouble tickets in relation to the customer portal. Do not change the other settings!

You may assign the **Trouble Tickets** to an other CRM user. When a ticket from the **Customer Portal** has been created, this ticket will be assigned to the corresponding module owner (user). The assigned user will receive an immediate e-mail notification on the ticket creation. This is useful, for instance, for active trouble tickets management.

## Currencies

Click **[Currency Configuration]** to set your system-wide currencies. You may add an unlimited number of currencies, by clicking the **[New Currency]** button as shown in [figure: Currency Configuration](#).



Figure 4.39. Currency Configuration

You may also delete or edit existing currencies by clicking the appropriate icons.

For new currencies you will have to provide the following information, as shown in [figure: Currency - Edit View](#):

Figure 4.40. Currency - Edit View

Table 4.7. Currency Information

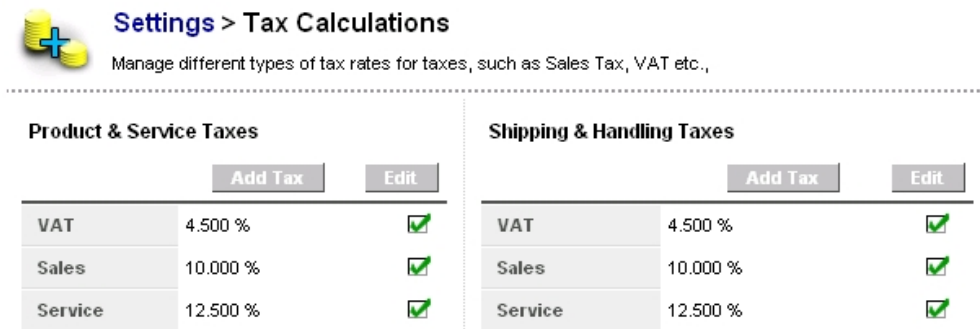
Type	Content
Currency Name:	The name of the currency, e.g. US Dollar.
Currency Code:	The short name of the currency, e.g. Dollar.
Currency Symbol:	Enter the symbol of the currency. This symbol will be used at the CRM for all price information, e.g. \$.
Conversion Rate:	Enter the currency conversion rate in relation to the CRM basic currency. The basic currency is the first currency at your currency list.
Status:	You may set a currency as active or inactive. Inactive currencies cannot get assigned to users as described in <a href="#">section: User Management</a> .

Click [**Save**] to transfer your currency settings to the CRM system.

## Tax Calculations

In all phases of the sales process, the CRM system considers all type of taxes which may apply to the sales of products or services. That may include local, state or federal taxes as well as special taxes. These taxes can be calculated individually for each product or service to be sold, or may be calculated for the whole. You

may refer to the article [Product Details in Quotes](#) for further information on the use of the tax settings. The CRM System may include taxes when calculating prices for quotes, orders or invoices. To change the settings of the existing taxes, click the **[Edit]** Button at the **Tax Calculations** menu as shown at [figure: Tax Settings - List View](#).



**Settings > Tax Calculations**  
Manage different types of tax rates for taxes, such as Sales Tax, VAT etc.,

Product & Service Taxes			Shipping & Handling Taxes		
VAT	4.500 %	<input checked="" type="checkbox"/>	VAT	4.500 %	<input checked="" type="checkbox"/>
Sales	10.000 %	<input checked="" type="checkbox"/>	Sales	10.000 %	<input checked="" type="checkbox"/>
Service	12.500 %	<input checked="" type="checkbox"/>	Service	12.500 %	<input checked="" type="checkbox"/>

**Figure 4.41. Tax Setting - List View**

To add new taxes use the **Add Tax** button. You might define as many additional taxes as you need. Enter your taxes in percent (%). Note that you cannot delete the default taxes as they are provided with the CRM system. However, you may deactivate not needed taxes by clicking the appropriate check box.

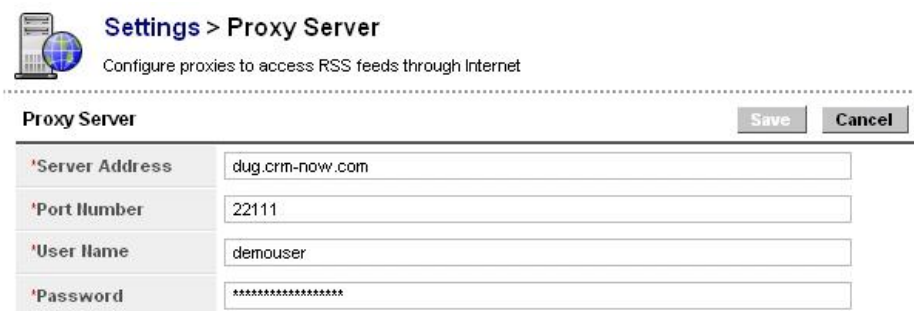
Click **[Save]** to transfer your tax settings to the CRM system.

## System Details

If you click the **System Information** menu, details on the server where the CRM system is running are presented. You may use these information to check the hardware resources available at your server.

## Proxy Server

If your company is using a proxy server to access the Internet, you can use the **Proxy Server Settings** menu as displayed in [figure: Proxy Server Settings - Edit View](#) to enter server information. This might be needed by your CRM system when you use the RSS Reader or for accessing web pages as described in [section: My Sites](#).



**Settings > Proxy Server**  
Configure proxies to access RSS feeds through Internet

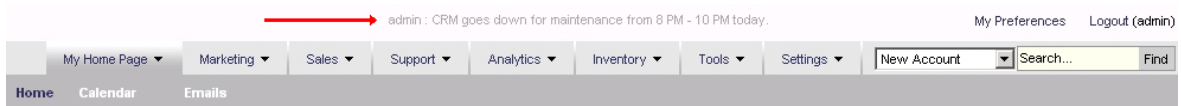
Proxy Server		Save	Cancel
*Server Address	dug.crm-now.com		
*Port Number	22111		
*User Name	demouser		
*Password	*****		

**Figure 4.42. Proxy Server Settings - Edit View**

You need to enter all information. Please contact your service provider for the access information. Click **[Save]** to transfer the settings to the CRM system.

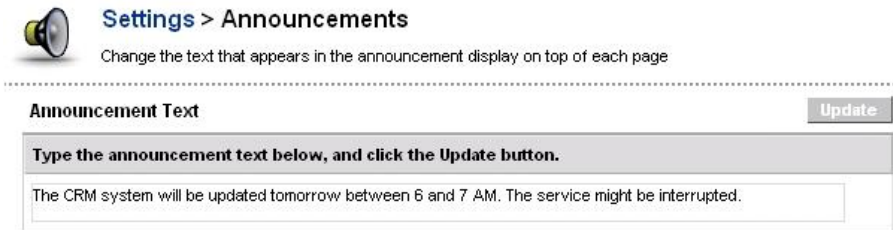
## Announcement

System administrators or users with administration privileges are provided with a function that enables them to send announcements to all CRM users. Such an announcement will be displayed at the top of the CRM system as illustrated in [figure: Announcement View](#).



**Figure 4.43. Announcement View**

You may edit an announcement by clicking the **Announcements** menu button to open the edit view as presented in [figure: Announcement - Edit View](#).

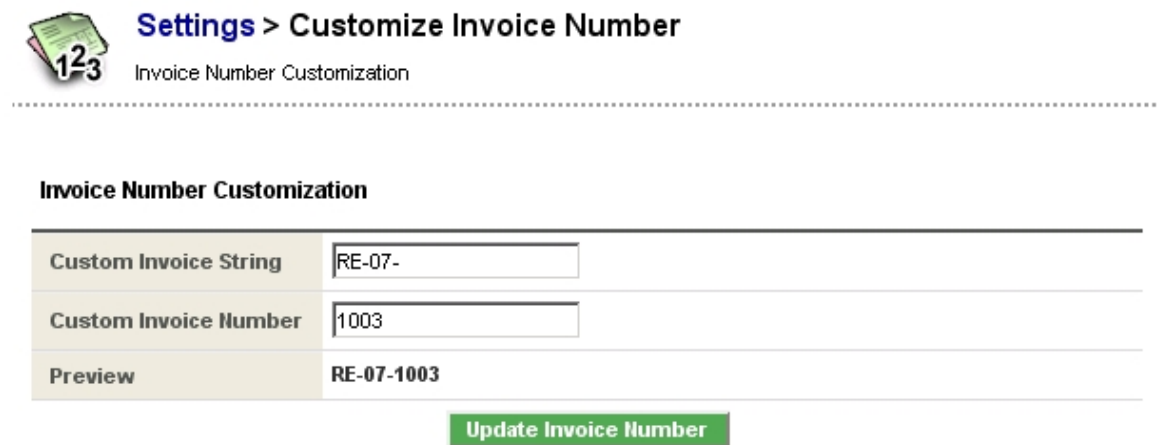


**Figure 4.44. Announcement - Edit View**

Click [**Save**] to make your announcement public. You may see the announcement when you leave the settings menu.

## Invoice Number Customization

While the CRM system uses its internal numbering system for all data stored in the system you can define your own numbering scheme for your invoice numbers. You should define your numbering scheme by clicking the **Customize Invoice Number** menu button as shown in [figure: Customize Invoice Number](#).



**Figure 4.45. Customize Invoice Number**

You have to define a string that accomplishes the invoice number at the front and the starting number for your invoices. Click [**Save**] to make your numbering scheme active. This scheme will now be used for all invoices as described in [section: Invoices](#).

## Default Module View

The detail view of CRM entries is offering a **More Information** tab, that provides additional information related to an entry. You may switch to a **Singlepane** view. At this view the additional information will be listed below the master data as displayed in [figure: Default and Singlepane View Details](#). Note that after switching the detail view for all CRM system modules changes.

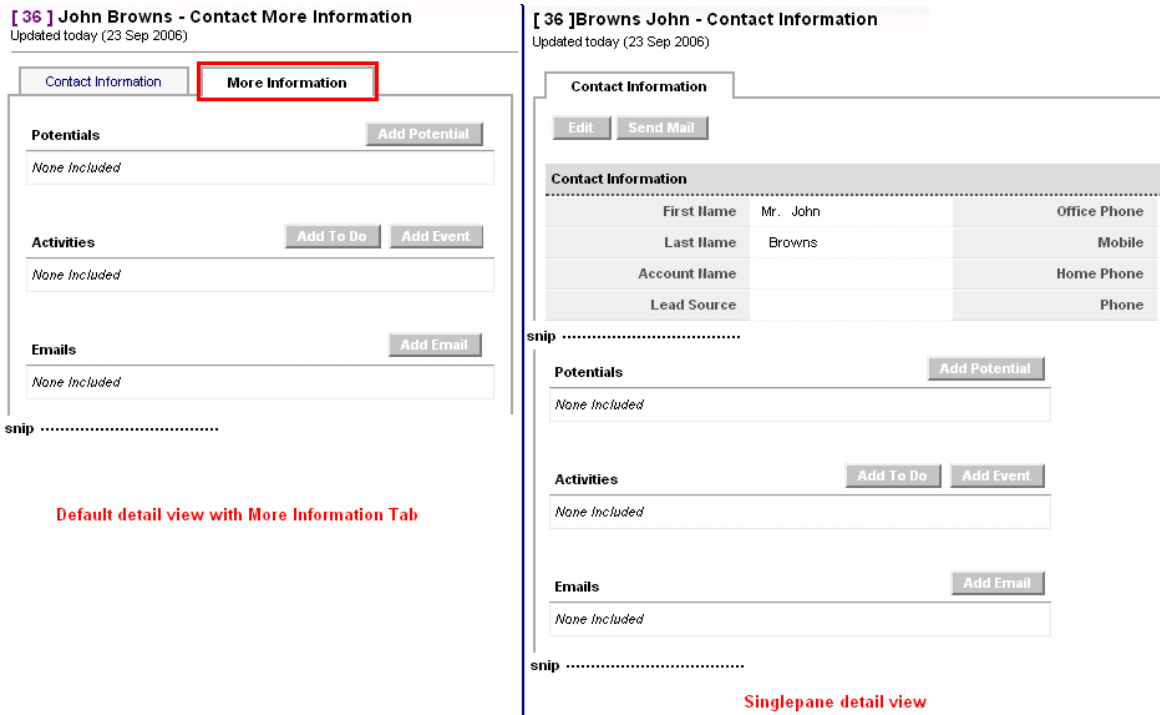


Figure 4.46. Default and Singlepane View Details

## Migration Wizard

If you want to transfer your data from a previous version of the CRM system to a new version, you need to upgrade your data base. This can be done in the **Migration Wizard** menu. To migrate, please follow the instructions given on the screen. Make sure that you have made a backup of your data before you start migrating.

## 4.3. Customer Portal

The CRM system provides a feature that offers customers a limited access to your trouble ticket system. This access is provided by the **Customer Portal**.

The customer portal displays published FAQ's and allows authorized contacts to communicate with your company directly. That includes:

- The access to CRM system FAQ's by a **Knowledge Base**. You may use this to provide release information or to answer common questions on the goods or services your company offers.
- The possibility to create and to track tickets.

You can define who may access the ticket and FAQ system by a special login procedure. The access is controlled by the contacts master data as described in [section: New Contacts](#).

You may access the customer portal by a special URL. Ask your CRM administrator for this. Please refer to the **Customer Portal Manual** for further information, as listed in [Appendix: Resources](#).



## Appendix A. Administration Examples

This appendix discusses the security setup for example organizations and explains what individual users are allowed to do on the CRM system under certain conditions. These examples do not include all possibilities for configuring the CRM system based on a company needs. However, I believe that the principal functions of the security features are covered so that an administrator might quickly be able to create his own setup .

### A.1. Example I: Organizing a very small organization

The following configuration examples are based on a sales team as illustrated in [figure: Example Sales Team 1](#). The Sales manager is the supervisor for person 1 and 2 which are members of the **Team A**. The sales manager is also the supervisor of the secretary.

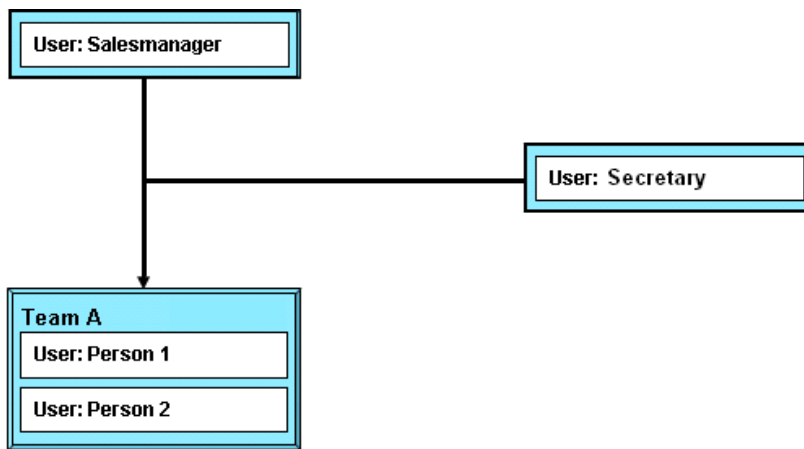


Figure A.1. Example Sales Team 1

#### A.1.1. Example I: simple settings

For the first example settings we want to have the following rules implemented for Leads:

- Person 1 and Person 2 have the permission to create Leads that are owned by Person 1 or Person 2.
- Person1 will have no access privileges to Leads from Person 2 and vice versa.
- The Sales manager has all access privileges to all Leads.
- The secretary has no privileges to access Leads.

The following settings are necessary:

**Create one common profile for Person 1, Person 2 and the Sales manager:**

We need one profile, called **Sales** which should include all CRUD privileges for Leads. Make sure that the **Global Privileges** are disabled.

**Create one profile for the Secretary:**

Based on the **Sales** profile create a new profile, called **Secretaryprofile** where the access to the Leads module is disabled.

**Create three roles:**

We need one role for the Salesmanager, called **Sales Manager**, and one subordinated role for Person 1 and 2, called **Sales Men**. All roles are based on the **Sales** profile.

In addition, we need another subordinated role for the secretary, called **Secretary Sales** based on the **Secretaryprofile** that reports to the sales manager.

**Set the sharing access:**

At the **Organization-level Sharing Rules** menu set the rules for Leads to **private**.



**Important**

Always remember: If you make changes to the sharing rules, you must hit the [**Recalculate**] button to make your changes valid!

Since role of the Sales manager is superior to the role of Person 1, 2 the Sales manager has all CRUD privileges to the data of Person 1 and Person2. If Person 1 or Person 2 create a Lead, the owner gets assigned. If Person1 is assigned as owner of a Lead, Person 1 and the Sales manager can access and modify this Lead. If the ownership is changed to any one member of the team (Person 1 or Person 2) then only this person and the Sales manager can access the Lead. The secretary does not see any Lead data.

### A.1.2. Example I: settings with groups

As another example settings we want to have the following rules implemented for Leads:

- Person 1 and Person 2 have the permission to create Leads that are owned by Person 1 or Person 2 or by the team.
- If a Lead is owned by a single Person the other team member will have no access privileges to this Lead.
- The Sales manager has all access privileges to all Leads.
- The Secretary has all access privileges to Leads owned by the team.

In order to implement these rules you have several options. These options are based on the following common settings:

**Create one common profile for Person 1 and 2 and the Sales manager:**

We need only one profile, called **Sales** which should include all CRUD privileges for Leads. Make sure that the **Global Privileges** are disabled.

**Create two roles:**

We need one role for the Sales manager, called **Sales Manager**, and one subordinated role for Person 1, 2 and the secretary, called **Sales Men**. Both roles are based on the **Sales** profile. Since the role of the Salesmanager is superior to the role of the other users the Sales manager has all CRUD privileges.

**Create one group:**

**Option 1:**

Create a group of users, called **Team A**. Include the Person 1 and Person 2 and the secretary user. We have to include the Sales Manager because groups of users are independent to the role based hierarchy and we will need access to the Leads assigned to Team A.

**Option 2:**

Create a group of role & subordinates, called **Team A**. Include the role of the Sales Manager.

**Option 3:**

Create a group of roles, called **Team A**. Include the role **Sales Manager**, the role **Sales Men**.

**Set the sharing access:**

At the **Organization-level Sharing Rules** menu set the rules for Leads to **private**.



**Important**

Always remember: If you make changes to the sharing rules you must hit the [**Recalculate**] button to make your changes valid!

If Person 1 or Person 2 create a Lead the owner gets assigned. If Team A is assigned as owner of the Lead, Person 1, Person 2, the Sales manager as well as the secretary can access the Lead. If the ownership is changed to any one member of the group (Person 1 or Person 2), then only this person and the Sales manager can access the Lead.

### **A.1.3. Example I: settings with sharing access**

As another example we want to have the following rules implemented for Leads:

- Person 1 and Person 2 have the permission to create Leads that are owned by Person 1 or Person 2.
- If a Lead is owned by a single Person another team member will have read only access privileges to this Lead.
- The Sales manager has all access privileges to all Leads.
- The secretary has **View** only privileges to access Leads.

In order to implement these rules I have to implement the following settings:

**Create one common profile for Person 1 and 2 and the Sales manager:**

We need one profile, called **Sales** that should include all CRUD privileges for Leads. Make sure that the **Edit All** check box under **Global Privileges** is disabled.

**Create one profile for the Secretary:**

Based on the **Sales** profile create a new profile, called **Secretaryprofile** where the access to Leads is set to **View** only.

**Create three roles:**

We need one role for the Sales manager, called **Sales Manager**, and one subordinated role for Person 1

and 2, called **Sales Men**. All roles are based on the **Sales** profile.

In addition, we need another subordinated role for the secretary, called **Secretary Sales** based on the **Secretaryprofile** that reports to the Sales manager.

**Global Access Privileges:**

We need to set the global privileges for Leads to Public Read Only.



**Important**

Always remember: If you make changes to the sharing rules you must hit the [**Recalculate**] button to make your changes valid!

Since the role of the Sales manager is superior to the role of Person 1, 2 the Sales manager has all CRUD privileges to the data of Person 1 and Person2. If Person 1 or Person 2 create a Lead the owner gets assigned. If Person1 is assigned as owner of a Lead, Person 1 and the Salesmanager can access and modify this Lead. If the ownership is changed to any one member of the team (Person 1 or Person 2) then only this person and the Sales manager can access the Lead. The secretary has read only privileges to all Lead data.

## A.2. Example II

This example demonstrates how the access to certain data can be controlled by a combination of groups with sharing rules.

Let us assume we have a sales team as displayed as an organization chart in [figure: Example Sales Team 2](#). The sales manager is the supervisor for Person 1 to 4, all organized in Team A and B, as well as the sales assistant. This sales assistant supports the sales teams.

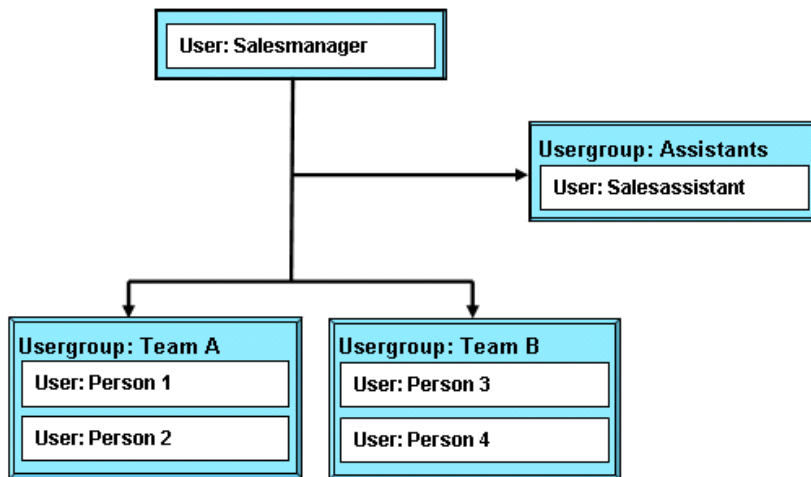


Figure A.2. Example Sales Team 2

### A.2.1. Example II: Settings primary based on groups

Let us assume we want to have the following rules for Leads implemented:

- Person 1-4 have the permission to create Leads which are owned by any person or by the Team A or B.
- Person 1-4 have Read/Write privileges to all Leads regardless who owns it.
- The Sales assistant has Read/Write privileges to Leads of the Team A only and cannot access the Leads of Team B.
- The Sales manager has all access privileges to all Leads.

In order to implement these rules I set the following privileges:

**Create two profiles:**

We need one profile for Persons 1-4 and the Sales manager, called **Sales** that should include all CRUD privileges. In addition, we need a profile for the Sales assistant called **Assistance** which should have the **Edit all** check box under Global Privileges deactivated. Besides, the **Delete** permission for the Leads module must be deactivated, too.

**Create three roles:**

We need one role for the Sales manager called **Manager**, one subordinated role for the Sales assistant called **Salesassistant** and one subordinated role for all Persons 1-4 called **SalesAll**. The roles **Manager** and **SalesAll** are based on the **Sales** profile whereas the role **Salesassistant** is based on the **Assistance** profile.

**Create three group of users:**

We create a group called **Team A** with the members Person 1 and Person 2 and a group called **Team B** with the members Person 3 and Person 4. We create a group called **Assistant** with the user Sales assistant as the only member.



**Note**

As described in [section: Sharing Access](#) sharing rules cannot be specified to share data between users. Since we want to use sharing rules for the Sales assistant, we have to create an additional group with only one member.

**At Default Organization Sharing Access we set the Global Access Privileges for "Leads" to Private**

This will cause that users cannot access other users Leads.

**Set Custom Sharing Rules for Leads:**

1. Leads of Group **Team A** can be accessed by Group **Team B**, we set the access privilege with Read/Write permission.
2. Leads of Group **Team B** can be accessed by Group **Team A**, we set the access privilege with Read/Write permission.
3. Leads of Group **Team A** can be accessed by Group **Assistant**, we set the access privilege with Read/Write permission.
4. Leads of Group **Team A** can be accessed by Group **Team A**, we set the access privilege with Read/Write permission.
5. Leads of Group **Team B** can be accessed by Group **Team B**, we set the access privilege with Read/Write permission.

**Note**

Since we have set the Global Access Privileges for Leads to **private**, Rules 4 and 5 are necessary to allow that the group members of Team A and B can see each others Leads.

**A.2.2. Example II: Settings primary based on roles**

As a modification to the example above let us assume we want to have the same rules for Leads implemented:

- Person 1-4 have the permission to create Leads that are owned by any person or team.
- Person 1-2 have Read/Write privileges to all Leads owned by Person 1-2 and Team A. They have Read only permissions to Leads owned by Person 3-4 or Team B.
- Person 3-4 have Read/Write privileges to all Leads owned by Person 3-4 and Team B. They have Read only permissions to Leads owned by Person 1-2 or Team A.
- The Sales assistant has Read privileges to all Leads.
- The Sales manager has all access privileges to all Leads

In order to implement these rules we set the following privileges:

**Create one common profile for all Persons, the Sales assistant and the Sales manager:**

We need only one profile, called **Sales** that should have the **Edit all** check box under **Global Privileges** deactivated.

**Create four roles:**

1. We need one role for the Sales manager called **Manager**, based on the **Sales** profile.
2. We need one subordinated role for the Sales assistant called **Salesassistant**, based on the Sales profile.
3. We need one subordinated role for the Person1 and Person2 called **Team A**, based on the Sales profile.
4. We need one subordinated role for the Person3 and Person4 called **Team B**, based on the Sales profile.

As a result, the roles **Salesassistant**, **Team A**, and **Team B** are on an equal hierarchical level subordinated to the **Manager** role.

**Create three group of users:**

We create a group called **Team A** with the members Person 1 and Person 2 and a group called **Team B** with the members Person 3 and Person 4. Note that the Sales manager has to be included in both groups since groups of users are independent of the role based hierarchy and he will need access to the Leads assigned to **Team A** as well as **Team B**. We create a group called **Assistant** with the user Sales assistant as the only member.

**Note**

As described in [section: Sharing Access](#) sharing rules cannot be specified to share data between users. Since we want to use sharing rules for the Sales assistant we have to create an additional group with only one member.

**At Default Organization Sharing Access we set the Global Access Privileges for "Leads" to Private:**  
This will cause that users cannot access other users Leads.

**Set Custom Sharing Rules for Leads:**

1. Leads of Role **Team A** can be accessed by Role **Team B**, we set the access privilege with Read Only permission.
2. Leads of Role **Team B** can be accessed by Role **Team A**, we set the access privilege with Read Only permission.
3. Leads of Role **Team A** can be accessed by Role **Salesassistant**, we set the access privilege with Read Only permission.
4. Leads of Role **Team B** can be accessed by Role **Salesassistant**, we set the access privilege with Read Only permission.
5. Leads of Role **Manager** can be accessed by Role **Salesassistant**, we set the access privilege with Read Only permission.
6. Leads of Role **Team A** can be accessed by Role **Team A**, we set the access privilege with Read/Write permission.
7. Leads of Role **Team B** can be accessed by Role **Team B**, we set the access privilege with Read/Write permission.

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### A.3. Administration FAQ

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**How to remove not needed Tabs:**

Let us assume you do not need the **Tools** tab for certain users. To make this tab invisible, you have to disable the modules **RSS** and **My Sites** at the users profile. **RSS** and **My Sites** are displayed as sub tabs at the tools menu.

You may follow this procedure:

1. Locate the profile which a non-admin user belongs to. For example: Person1 has the role of a **Sales-Manager** which is associated with the **Sales** profile.
2. As administrator goto the **Settings** menu and click [**Profiles**]. There you will find a list of profiles including the **Sales** profile. Open the **Sales** profile by clicking the [**Edit**] button. You will see a list of all modules with check boxes.
3. Unmark the check boxes of modules which you do not want to have displayed.

Users with administrator privileges can see all the data, hence this feature of hiding modules is not available.

**Note**

As a general rule, as soon all sub tabs of a menu are disabled in the profile, the parent tab will no longer be displayed.

**How to delete users, groups, profiles and roles:**

If you delete a user, group, profile or role you will be asked for a new owner of the data. After selection the data will be moved to the new owner and will not be lost.

**How to change a users login name:**

You cannot change the login name of a user directly. Instead, create a new user with a new login name and delete the old user. During deletion transfer all data of the old user to the new user.

**How to restrict users sharing access:**

If you have set everything based on the rules and tips provided and you still not get the desired results please check the following:

- Have you set the default organisation sharing access to private?
- Have you disabled **View All** and **Edit All** at the **Global Permissions** for profiles used?
- Have you clicked on the **Recalculate** button after making changes to the organisation sharing access?
- Have you disabled the admin option for the users?

The CRM system checks the security system in the following order:

1. The **Global Privileges** are checked first. If the **Global Privileges** are enabled, no other security check will be done. Depending on the settings, any user may view and edit all the data of the CRM System, except the **Settings** module. At the same time the profile permission overrides the sharing rules, because the CRM system will not include the sharing rules into considerations.
2. If the **Global Privileges** are disabled, the system will check for the **Tab Privileges at the Profiles**. If the **Tab Privileges** are disabled, a user cannot view a particular model. At the same time the profile permission also overrides the sharing rules. This is because whatever permission you have in the sharing rules, this will not be taken into considerations if you do not have access to a particular module in first place.
3. If the **Tab Privileges** are available, this means that a current user can view a particular model. Now the CRM system checks for the settings of the **Sharing Rules**.

**How to include contacts into a campaign:**

Follow these steps if you want to associate a list of contacts to particular campaign:

1. at the Contacts List View:
  - If you do have contacts already in your CRM import your contacts (see [section: Export and Import of Leads, Contacts, Accounts and Vendors](#)).
  - Create a custom view for the imported contacts (see [section: Customize Lists](#)).



2. at the Campaign List View:
  - Create a campaign.
  - In campaign detail view, scroll down to the Contacts related list (or select the **More Information** tab).
  - In Contacts related list there are three options: Load List | Select Contact | Add Contact
    - Load List: for associating contacts in bulk from the custom view. Select your required custom view to load your contacts list.
    - Select Contact: for selecting a few contacts from the available contact list
    - Add Contact: for adding new contact on-the-fly
  - Select the contacts you want to include into your campaign.

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## Appendix B. Resources

The quantity of information about vtiger CRM is growing on a daily basis. This appendix strives to provide both a complete bibliography of the references mentioned explicitly in this book, and a sampling of resources for additional information on vtiger CRM and on CRM in general. Although not all of these resources are focused on vtiger CRM specifically, they still provide helpful information for vtiger CRM users.

### B.1. Latest Versions of this Manual

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The latest version of this manual can be obtained from the document download page at <http://www.vtiger-deutschland.de/vtigerdoku.html>

### B.2. Resources for Resources

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Easily the largest and most up-to-date list of other vtiger CRM resources can be found on the vtiger Web page: <http://www.vtiger.com>.

### B.3. Other Material on vtiger CRM components.

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vtiger hosts a set of documents that provide installation and operational descriptions about the CRM and its extensions at [http://wiki.vtiger.com/index.php/Users\\_Zone#vtiger\\_Extensions\\_Documents](http://wiki.vtiger.com/index.php/Users_Zone#vtiger_Extensions_Documents). Here you will find:

- vtiger CRM installation manuals
- additional administration and user manuals
- manuals for the CRM extensions such as the Outlook Plugin, Office Plugin, Customer Portal, Thunderbird Extension and Firefox Extension
- Administration manuals for technical issues
- How Tos

### B.4. International vtiger community

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There is a large international community that contributes to the vtiger CRM system. You may check out the following links for other documents or contributions:

- France: <http://www.vtiger.fr/>
- Germany: <http://www.vtiger-hilfe.de>
- Italy: <http://www.vtiger.it>
- Netherlands: <http://vtiger-nl.org/>

- Poland: <http://www.vtiger.org.pl/>
- Russia: <http://www.vtiger.ru/> and <http://myvtiger.kostigoff.net/>
- Spain: <http://www.vtigercrm.es/>

This list might be incomplete since the vtiger community is growing fast. Please contact the author at [vtiger-manual@crm-now.com](mailto:vtiger-manual@crm-now.com) if you know other references to be included in the next manual revision.

## B.5. UTF-8 coding tools

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The CRM system uses the UTF-8 format to store data. The following links may help you to understand this format and to use it when you import or export data.

- The online Wikipedia explains everything what you know about UTF-8: <http://en.wikipedia.org/wiki/UTF-8>
- Notepad++ is a generic editor you can use to convert data from and to UTF-8: <http://sourceforge.net/projects/notepad-plus/>
- vtiger tool for UTF-8 conversion: <http://forge.vtiger.com/projects/utf8converter/>
- a collection of other converting tools for UTF-8: [http://dataconv.org/apps\\_unicode\\_utf8.html](http://dataconv.org/apps_unicode_utf8.html)

## Appendix C. ChangeLog

This appendix details the changes made between versions.

### C.1. for vtiger CRM Version 5.x

```
Changes to engl/*

|
| 2006-09-25  crm-now / Frank Piepiorra
|
| * v1.0 document release, all chapters for CRM version v5.0.0
|
| 2006-10-16  crm-now / Frank Piepiorra
|
| * v1.1 document release, updated custom field settings
|   chapter for CRM version v5.0.1
|
| 2007-04-23  crm-now / Frank Piepiorra
|
| * v1.2 document release, updated for v5.0.3
|   new chapters included to describe new functionalities, eg. Invoice Customization
|   screenshots improved
|   improved descriptions in various chapters based on users feedbacks
|   new references to vtiger Forge added
|
| 2007-06-26  crm-now / Frank Piepiorra
|
| * v1.2 document release, language review
|   document has been reviewed by native speaker
|
| 2008-03-14  crm-now / Frank Piepiorra
|
| * v1.3 document release, updated for v5.0.4
|   new functions included, e.g.
|   - e-mail PDF for invoices
|   - role based picklists
|   - export filter
|   - new automatic e-mails
|   - improved descriptions in various chapters based on users feedbacks
|   UTF-8 explanations added
```

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