COMODO
Creating Trust Online®

CRM

Customer Relationship Management

Software Version 1.0

Administrator Guide

Guide Version 1.0.113018

Comodo Security Solutions
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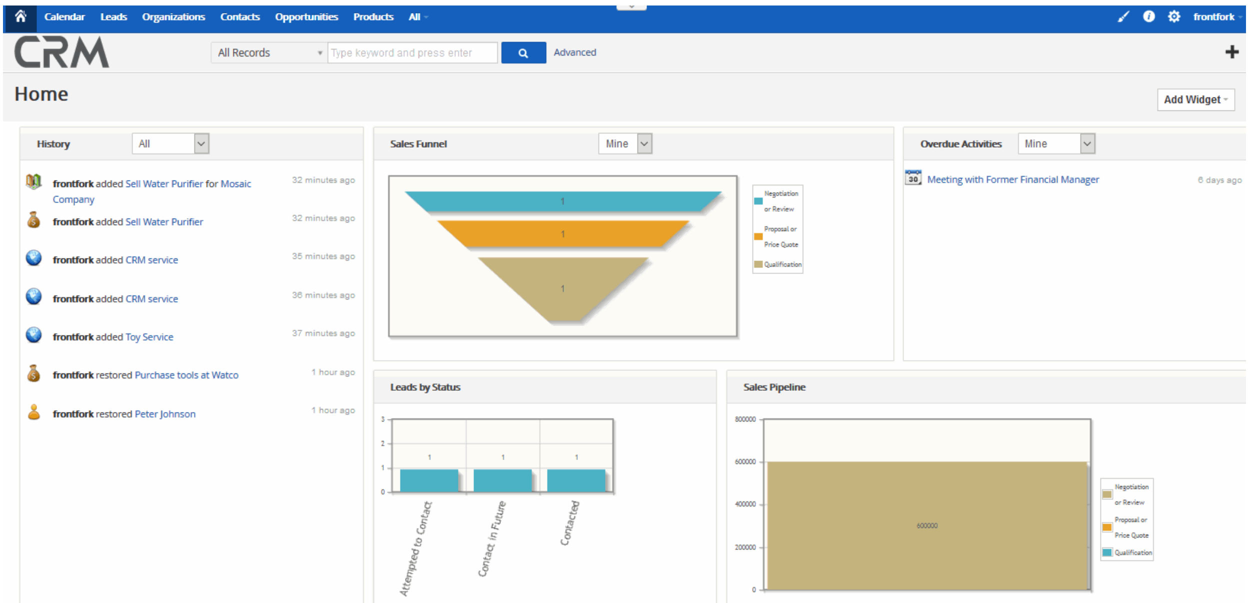
Table of Contents

1. Introduction to CRM

CRM allows businesses to save time and grow productivity by implementing automatic workflows to generate, nurture and close customer leads and opportunities.

CRM benefits:

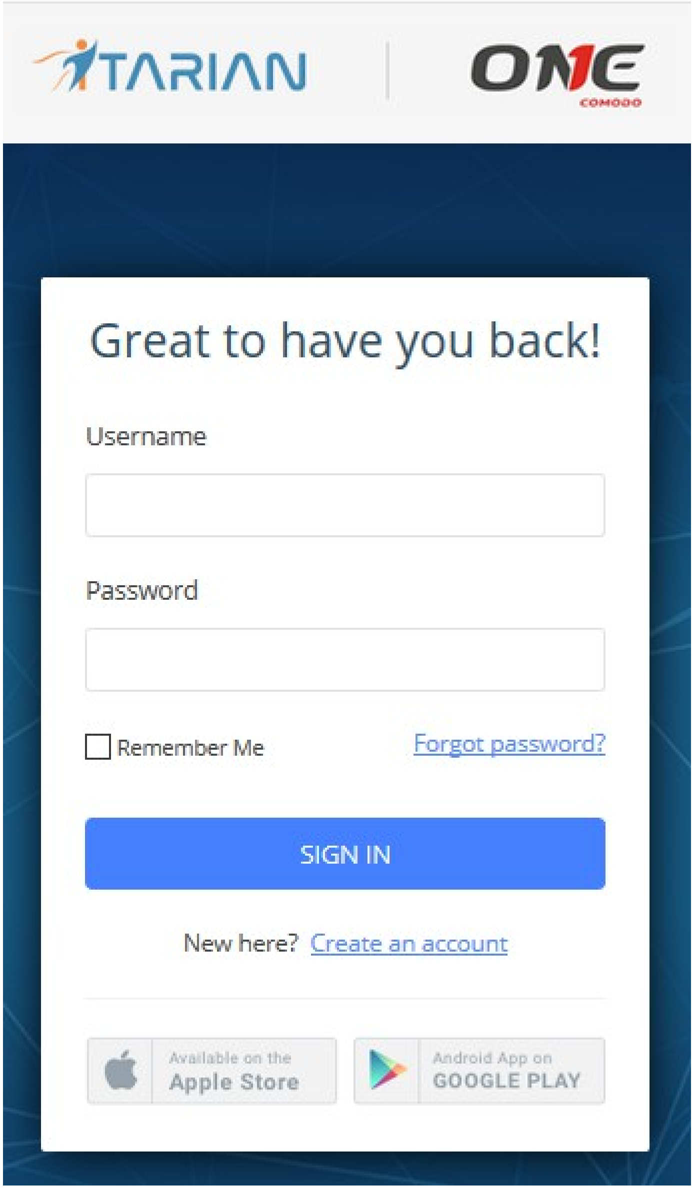
- Automation of sales processes
- Customer Support & Services
- Marketing Automation
- Inventory Management
- Calendar & Activity Management



This guide will take administrators through the set up and ongoing usage of CRM and is broken down into the following main sections:

1.1. Log in to CRM

Login to CRM Module with your user name and password at **https://one.comodo.com/app/login**

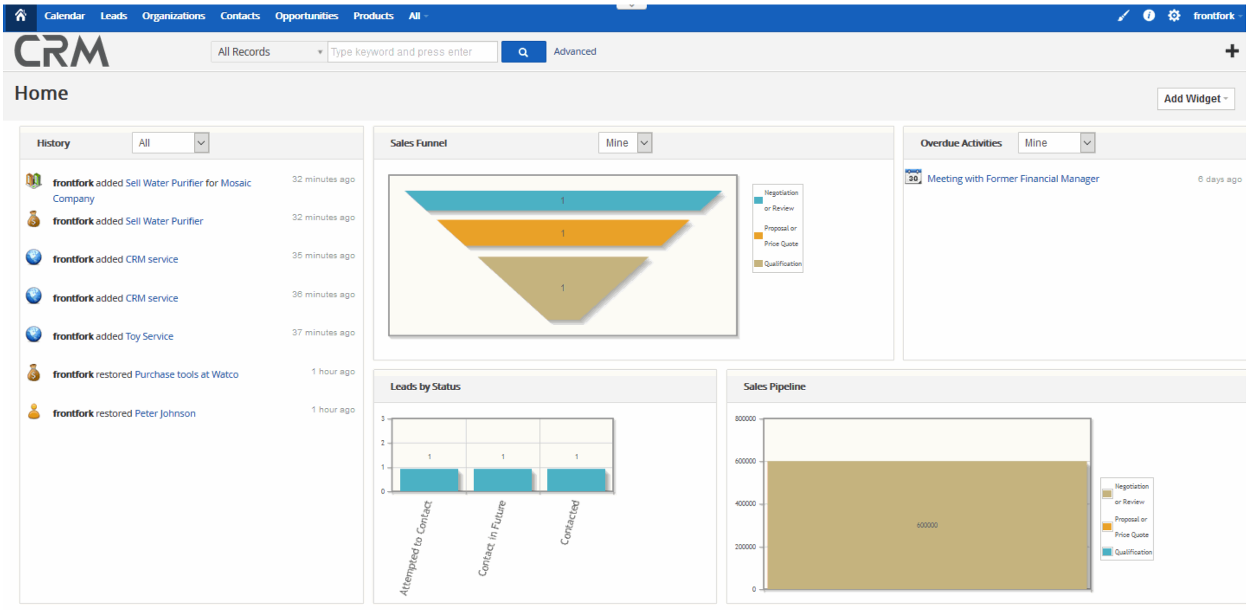


The ITarian Dashboard will be displayed.

- Comodo One will open at the dashboard by default
- Click 'Licensed Applications'
- Click 'CRM' to open the interface

2. The CRM Administrative Console

The administrative console is a single pane of glass that allows administrators view, manage and track all customer leads and opportunities.



The Main Functional Areas

1. **Title Bar -** Displays the controls for using the CRM features.
2. **Home -** Displays the CRM home screen. See **The Home Screen** for more details.
3. **General Icons -** Shortcuts to CRM modules
4. **All -** Allows you to select the module to open in the management area
5. **Theme -** Allows you to select the color theme of the interface
6. **Help -** Displays CRM help documentation
7. **Settings -** Allows you to configure various settings in the CRM console.
8. **'Quick Create' menu -** Quickly access key areas of the CRM
9. **Search Options -** Search for records. Use the drop-down to select the type of records you wish to search.

Management Area - Displays the management interface for the chosen module and allows you to create and manage records, view reminders and more.

Note: Only administrators can configure the main menu and apply the settings to all users.

See the following sections for more details on:

- **The Home Console**
- **Configuring your Preferences**
- **Using Search Option and Filter Option in CRM**

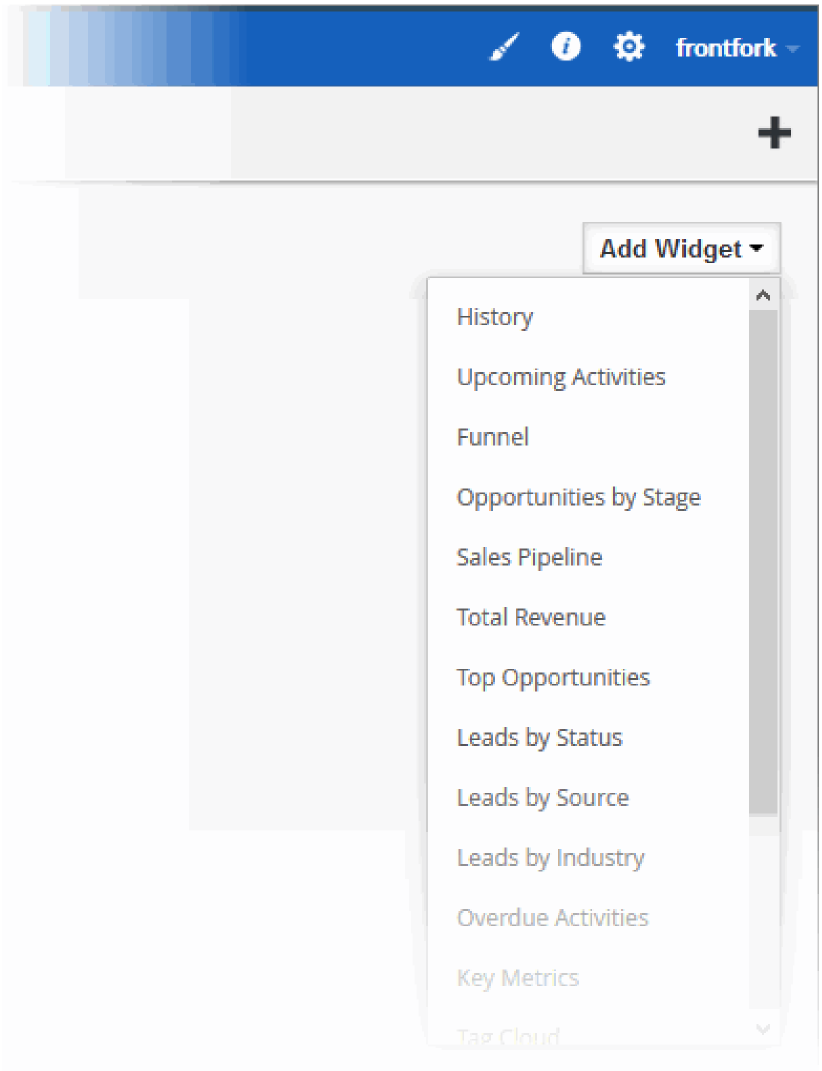
2.1. View and Manage the Home Console

After logging in to CRM, the home page will be displayed by default. The statistics and charts shown on the home page can be customized by adding different widgets.

Widgets are tiles containing key performance indicators which you can add to the home screen.

- To add a widget, go to the home page and click the 'Add Widget' button.

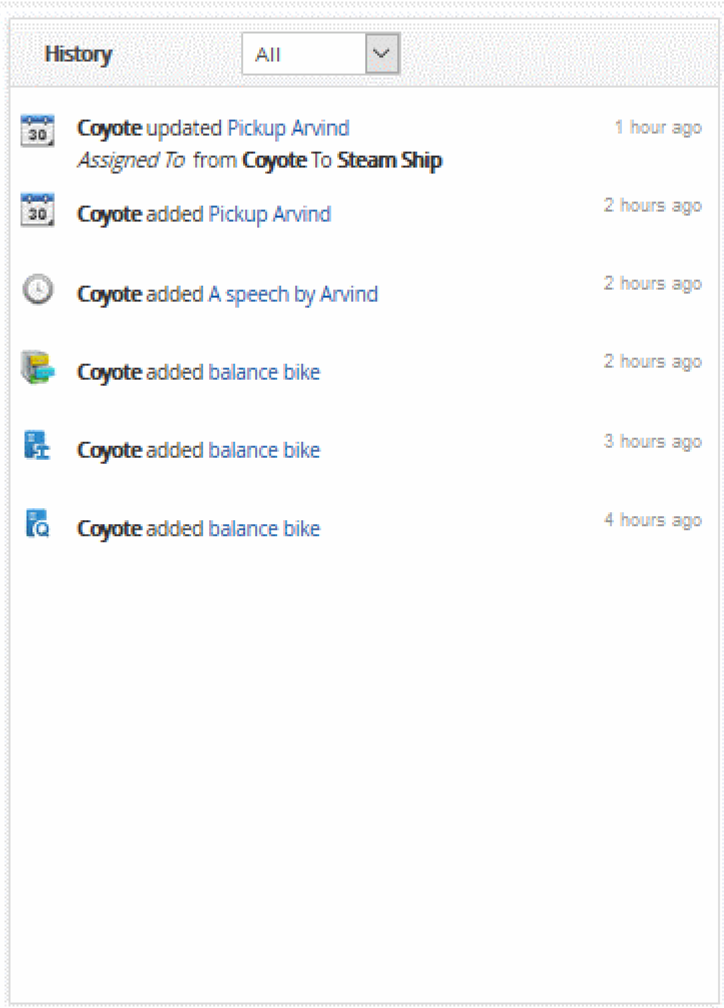
- Choose a widget from the list. The chosen tile will appear on the home screen.



- To refresh a widget, click the 'Refresh' icon at the top-right of the widget tile
- To remove the widget, click 'X' at the top-right of the tile
- Click the cog icon at the top-right of a widget tile to filter the data which is shown.

The following sections provide more details about each of the various tiles you can add:

- **History -** A real-time feed of user actions performed on records in modules. The 'History' widget cannot be deleted.

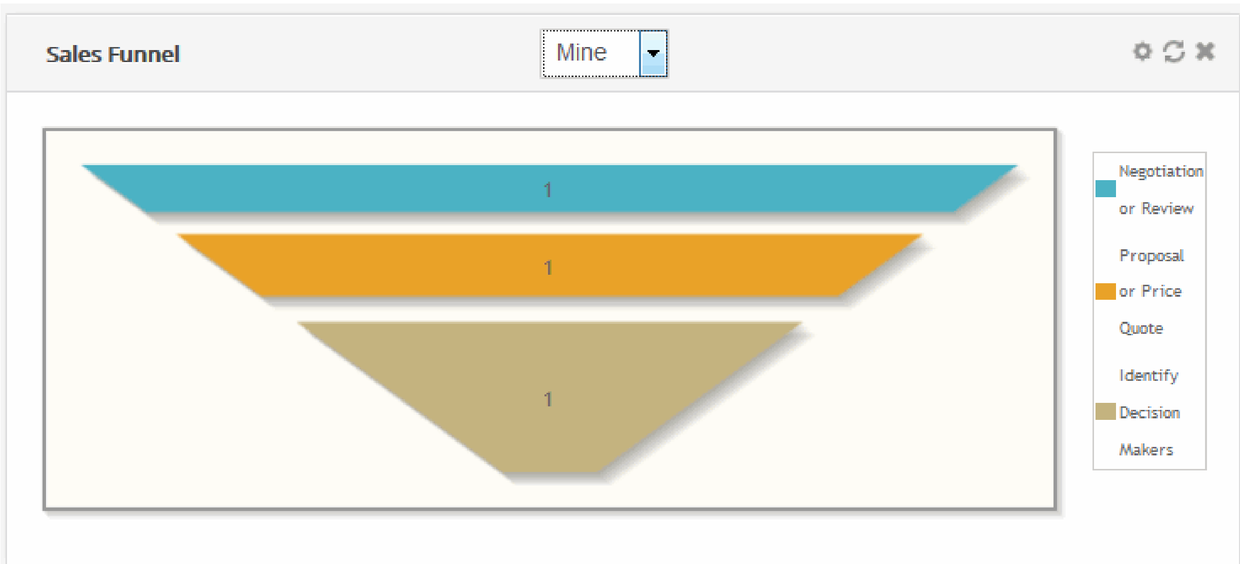


Administrators can see a complete history of changes across all records. Non-admin users can only see their own changes in the history.

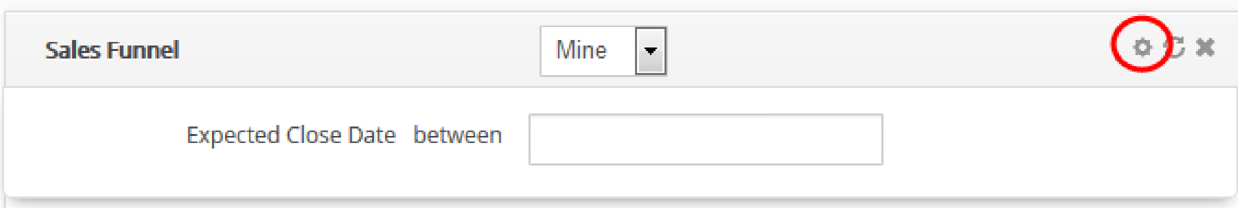
- Use the 'History' search filter to view records per 'Comment' or 'Updates'

You can search upcoming activities as per 'Mine' or 'All' records.

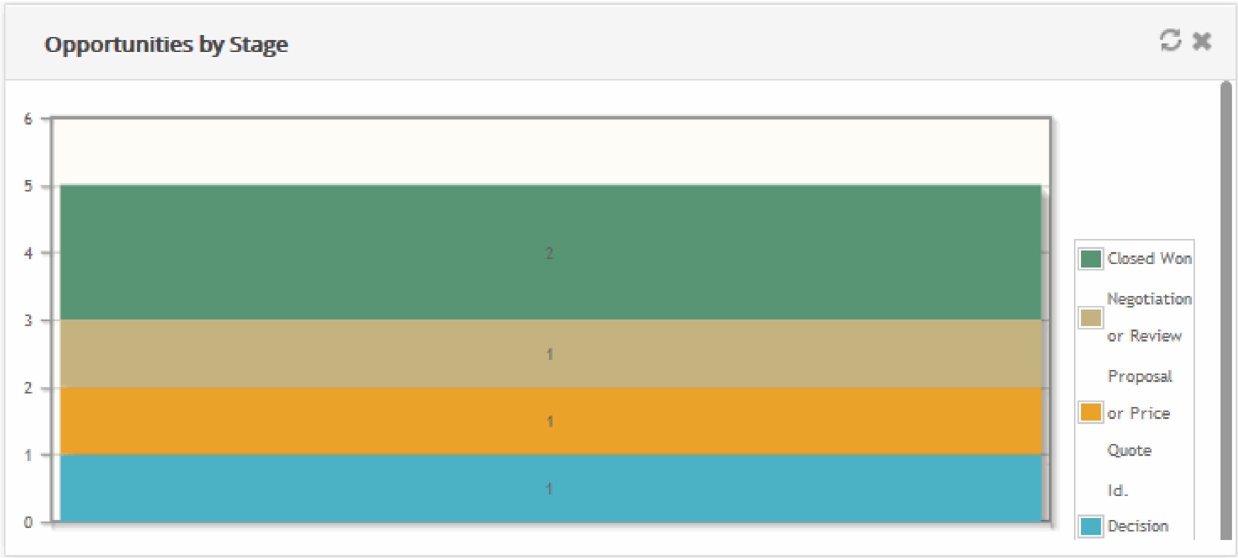
- **Funnel -** Shows the number of opportunities you have in each stage of your sales cycle.



Use the drop-down above the chart to view the sales funnels of individual users, groups or of the entire company.

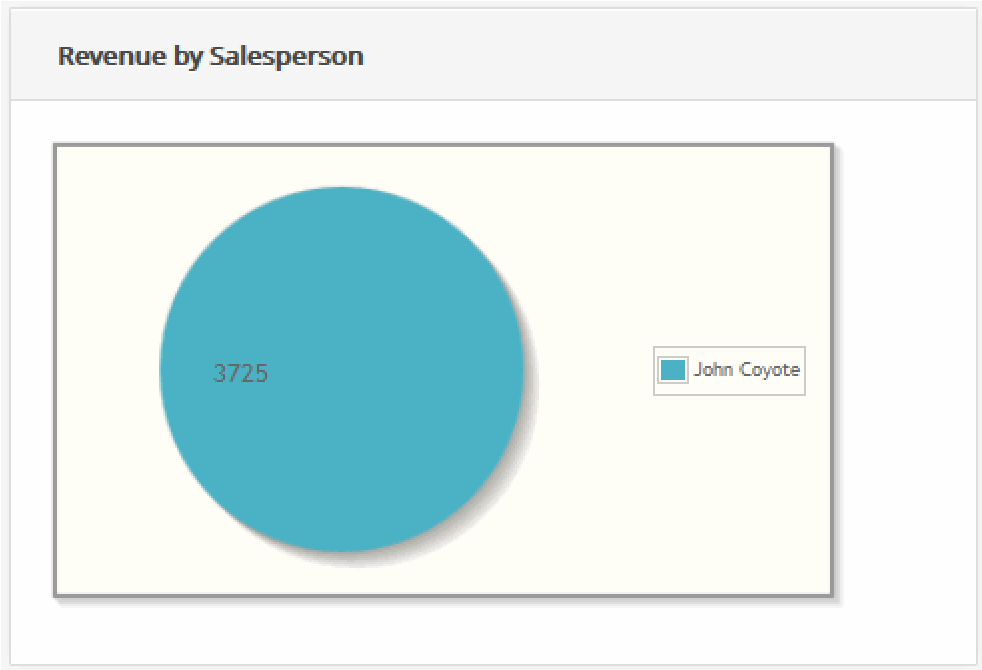


- **Opportunities by Stage -** Shows a bar chart representation of the Opportunity records of different users according to sales stages



- **Sales Pipeline -** Shows the amount of potential revenue tied up in each stage of your sales cycle.

- **Revenue by Salesperson -** Shows revenues generated by different sales representatives on your team.



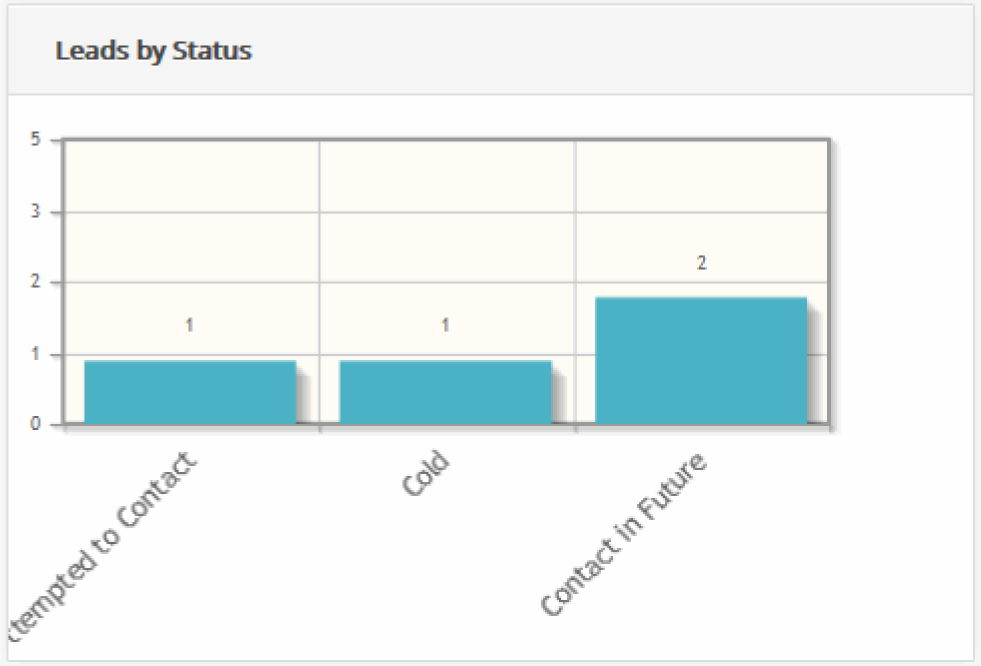
You can search for revenue by specific salespersons by clicking the cog icon at the top of the widget.

- **Top Opportunities** - Shows open leads with the highest projected revenues

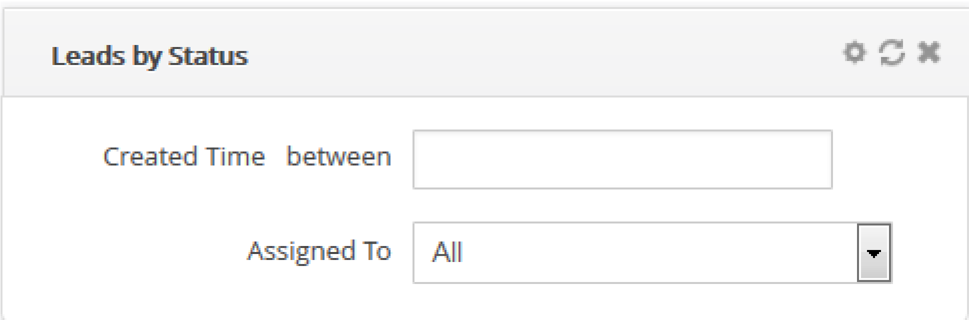
Top Opportunities

Opportunity Name	Amount	Organization Name
Watco Opportunity	600,000.00	Watco Companies
My open Opportunity	235,000.00	Mosaic Company
Purchase tools in Watco	1,063.10	Alton Steel Inc.

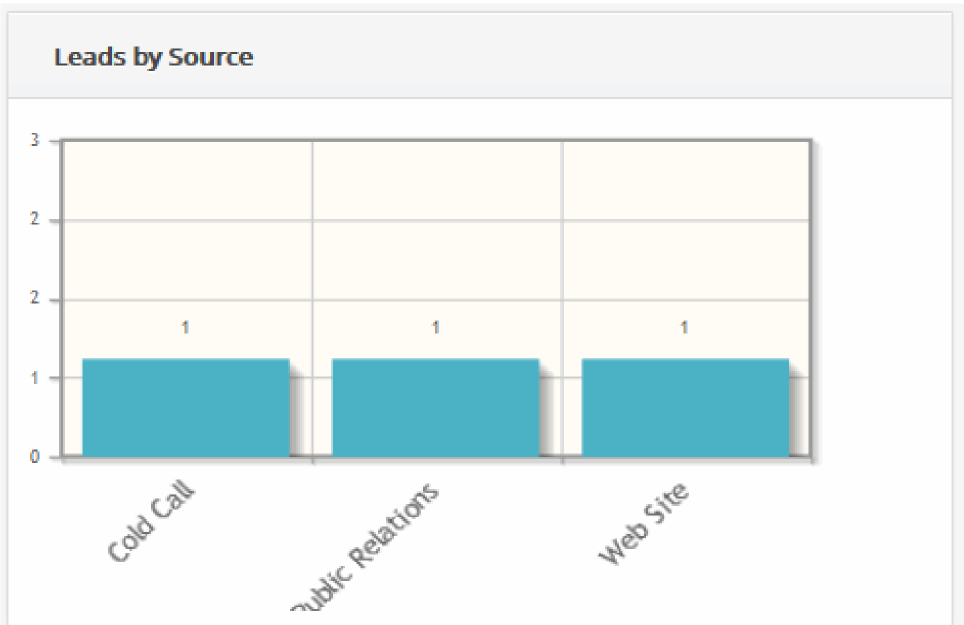
- **Leads by Status** - Shows the status of open leads and how many are in each status.



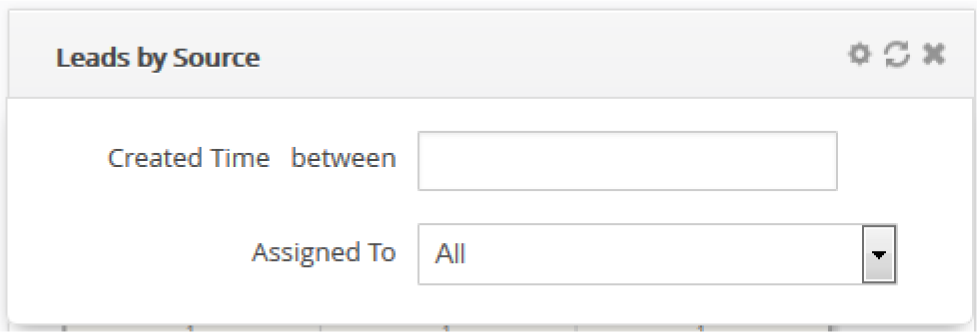
Click the cog icon to filter leads by creation date and/or by salesperson.



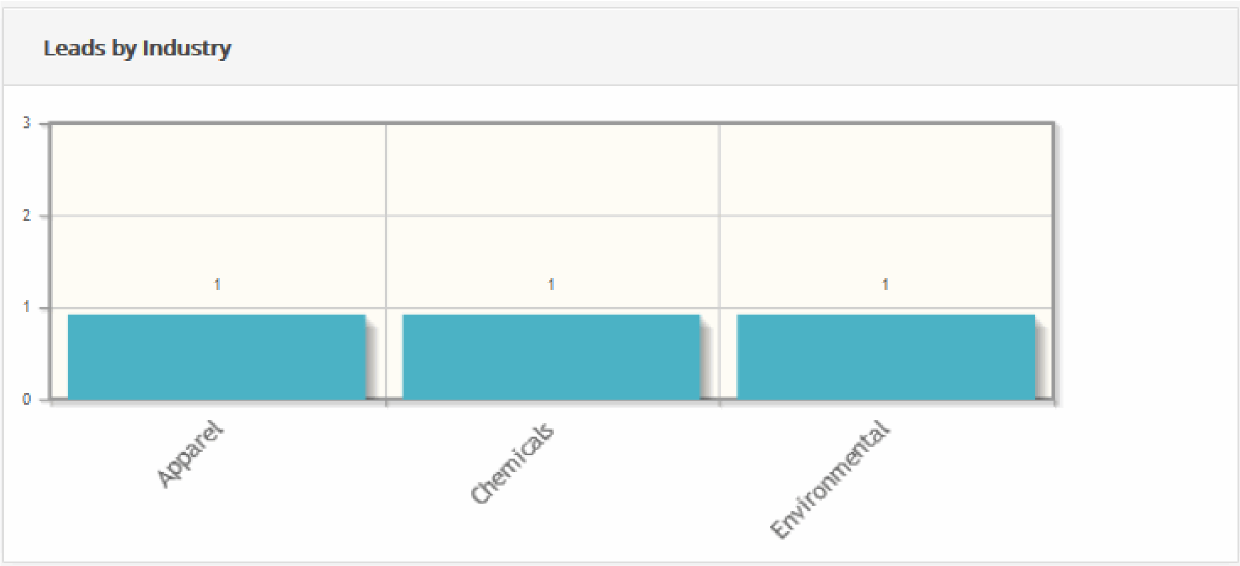
- **Leads by Source -** Shows the channels through which your leads were generated. The number of leads created by a particular channel is shown above its bar.



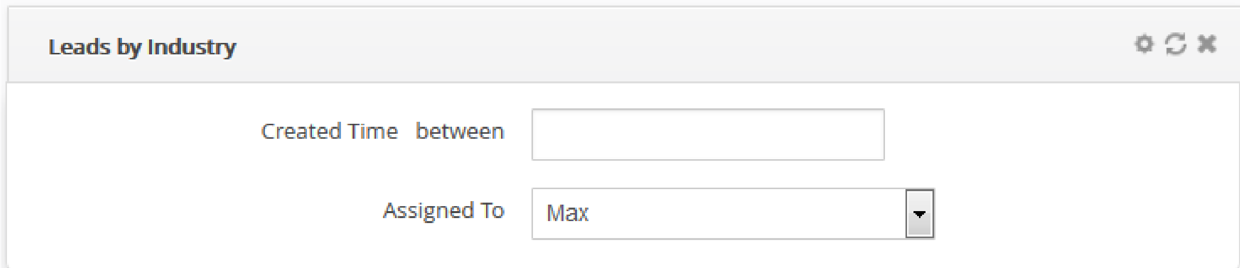
Click the cog icon to filter leads by creation date and/or by salesperson.



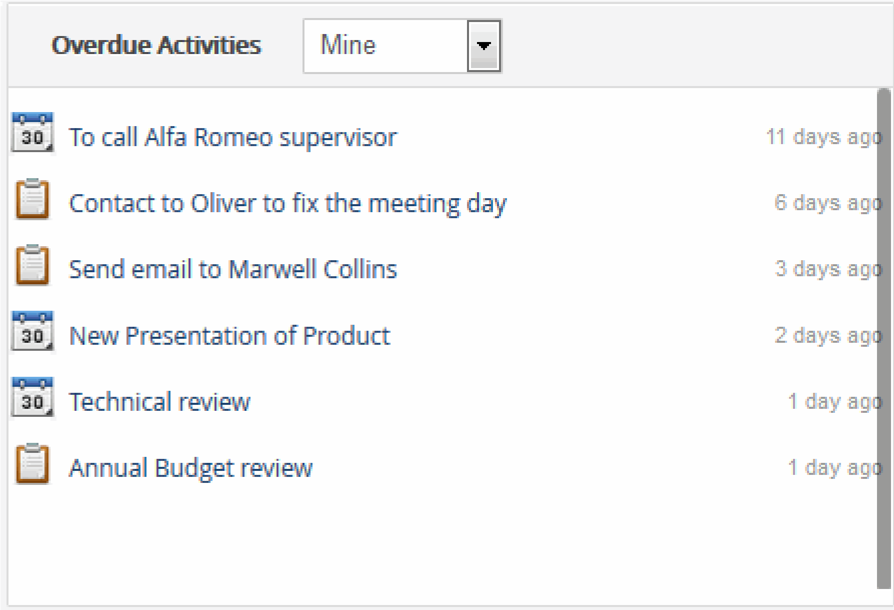
- **Leads by Industry -** Shows leads by the industry vertical to which they belong.



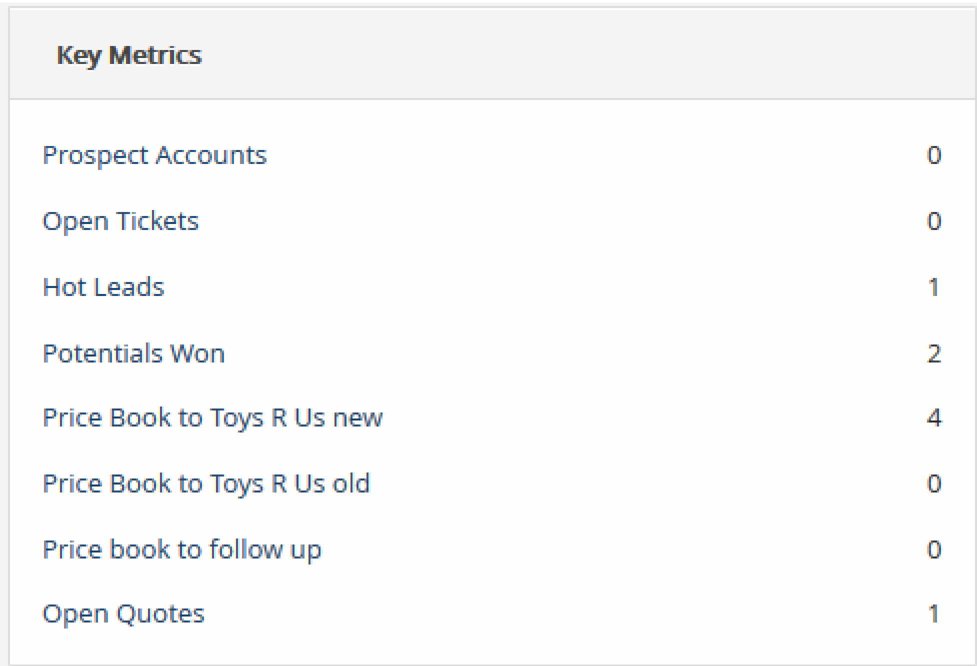
Click the cog icon to filter leads by creation date and/or by salesperson.



- **Overdue Activities -** A list of events which were not completed by the deadline set for the task.

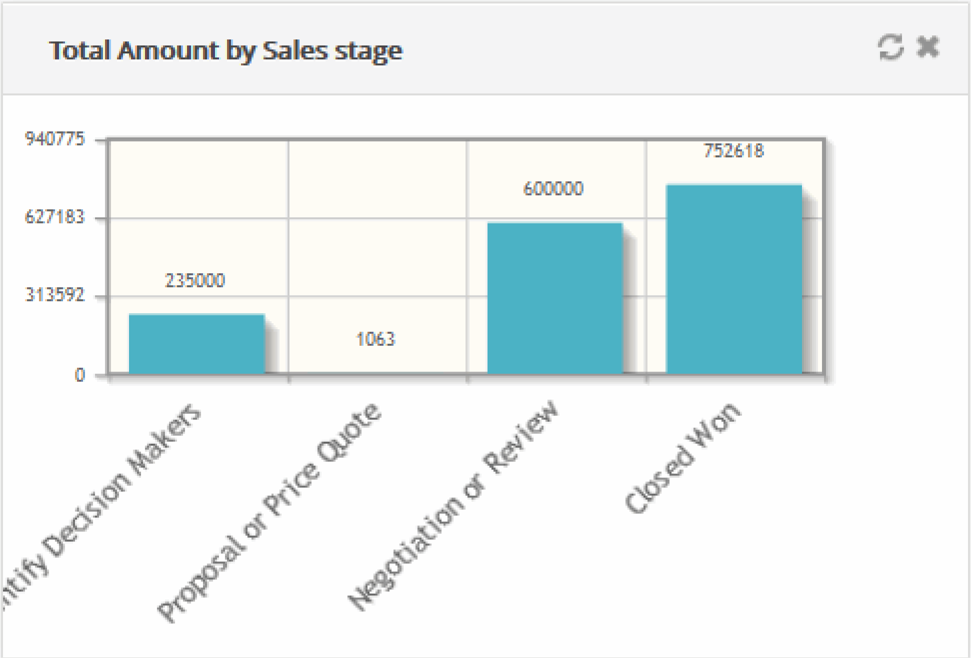


- **Key Metrics -** A top-level list of important statistics about your sales operations.

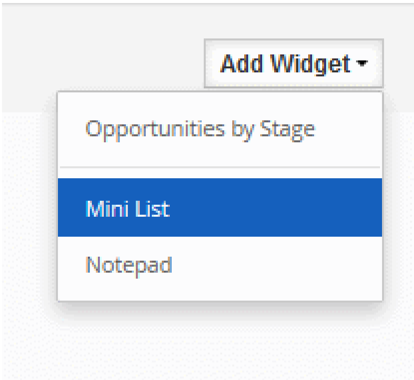


- **Tag Cloud -** The list of all tagged records. You can tag a record from any of the CRM interfaces and it will be displayed in the 'Tag cloud' tile in the home page.

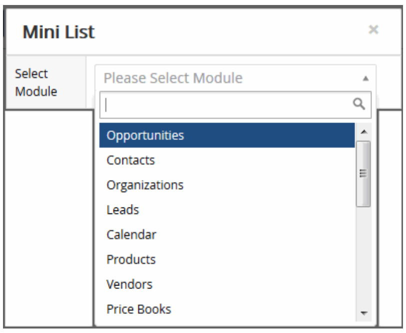
- **Total Amount by Sales stage -** Shows a bar chart of opportunities according to their sales stages.

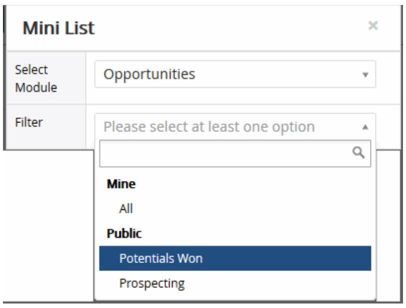


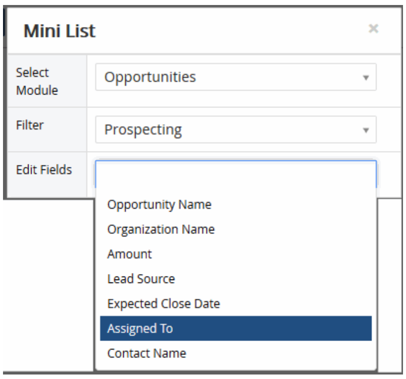
- **Mini List -** Allows you to display summary data from CRM modules.
    - To add a mini list, click 'Add Widget' button and then click 'Mini List' from the drop down menu.



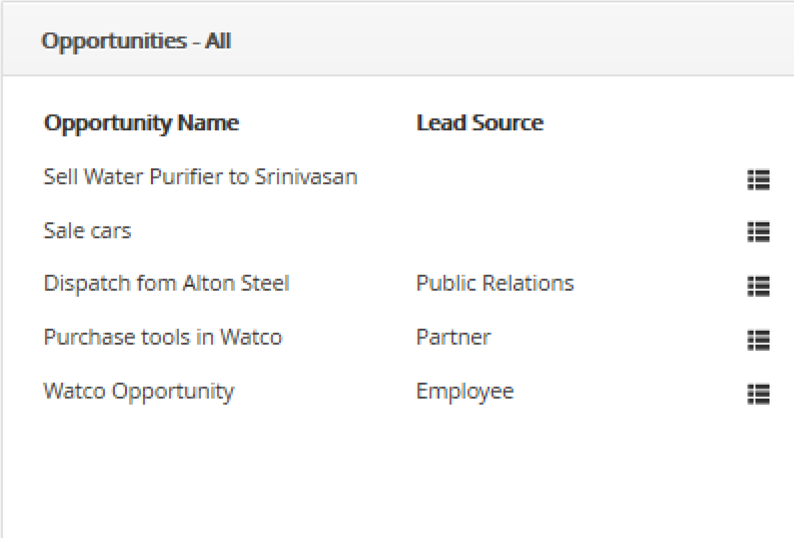
- In the pop-up, select a desired Module, Filter, and select fields (Max 2) that you want to see records from
- Click 'Save' to apply the filter







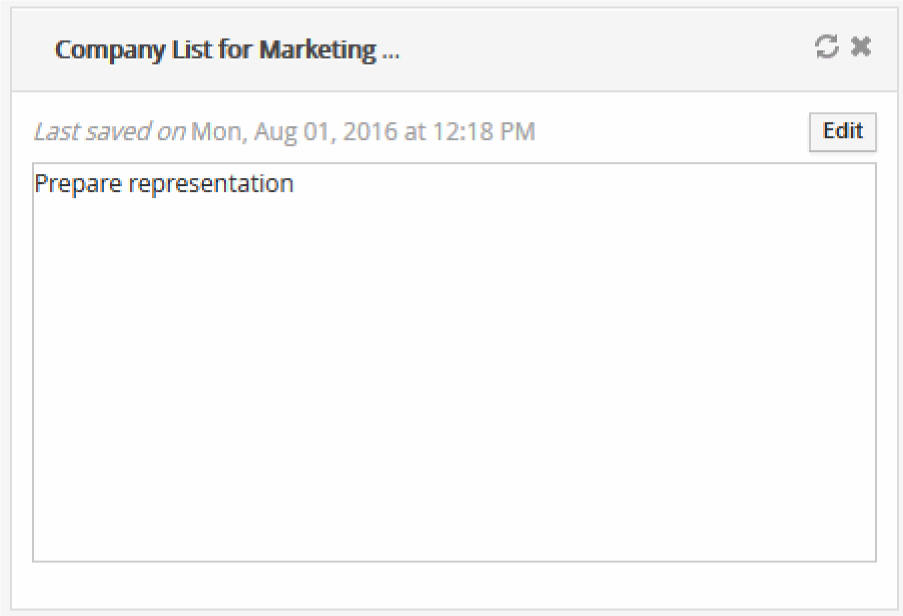
The information of records in the filter will now be displayed in home page.



- **Notepad -** Allows you to write and save quick notes on the home page.

- Enter notepad name and notepad content details and then click 'Save'.

The note will be displayed on the home interface.



- To edit the note, click the 'Edit' button at the top right corner.

Each module has a dashboard area accessible from the left side of the module interface.

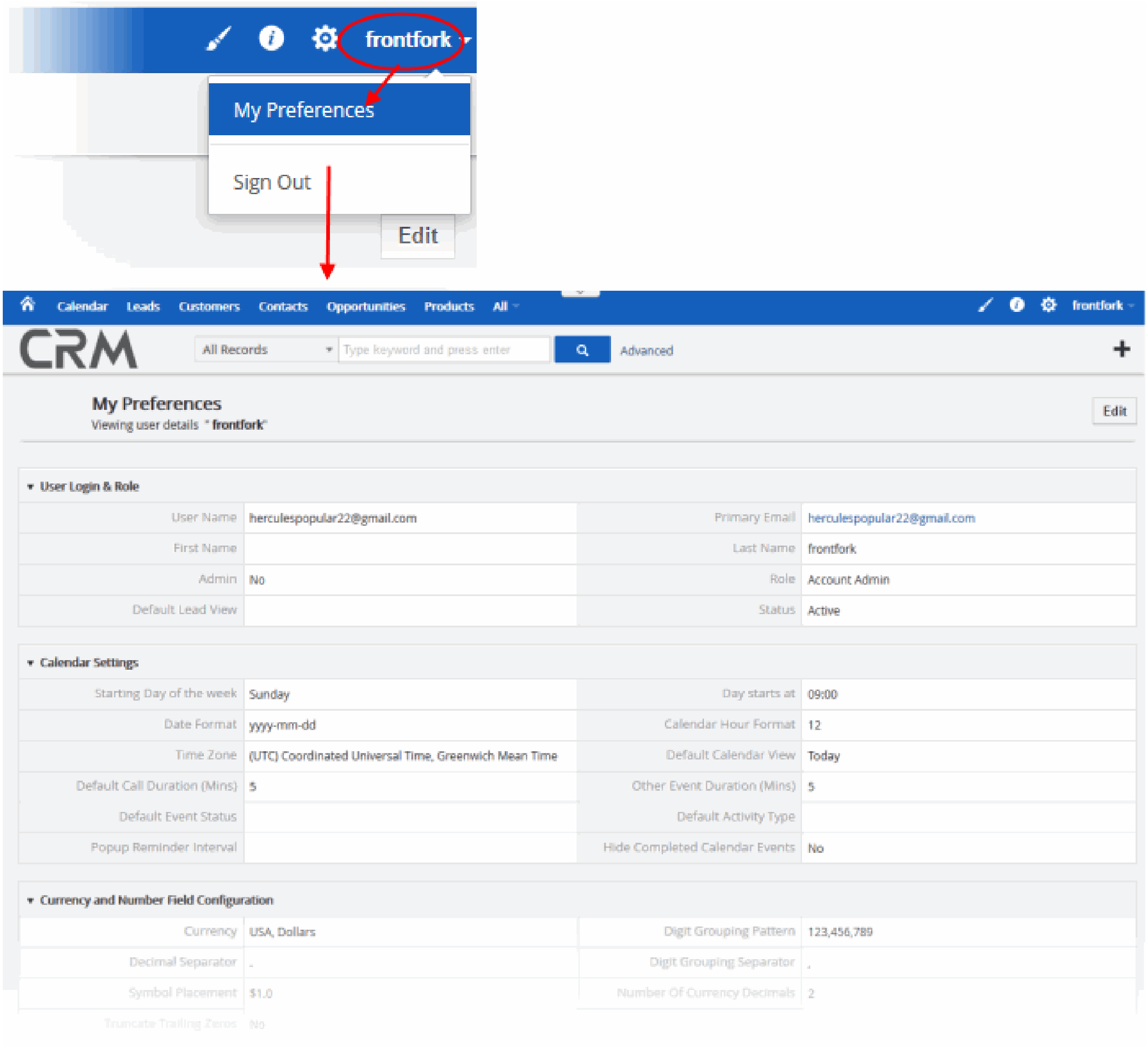
The 'Quick Create' menu on the right ('+' icon) allows you to quickly add new 'Campaigns', 'Organizations', 'Products', 'Vendors', 'Leads', 'Opportunities', 'Services', 'Events', 'Contacts', 'Assets' and 'Price Books'. See Quick Create to create these records in short period.

2.2. Configure your Preferences

'My Preferences' helps you to configure and update your personal information.

- To access to 'My Preferences' click the arrow under the user login name then select 'My preferences'.

The user's details menu will be displayed.



The 'My preferences' interface contains eight areas:

- User Login & Role
- Calendar Settings
- Currency and Number Field Configuration
- More Information
- User Address
- User Photograph
- Tag Cloud Display

User Login & Role

From this you can modify Primary Email, Name, and Default Lead View. Also, this section will help administrators to assign roles to individual users and view status.

▾ User Login & Role			
User Name	coyoteewile@yahoo.com	Primary Email	coyoteewile@yahoo.com
First Name		Last Name	Coyote
Admin	No	Role	Account Admin
Default Lead View	Today	Status	Active

- User Name - Specify the user name
- First Name - Specify the first name of the user
- Last Name - Specify last name of the user
- Primary Email - Specify primary email of the user
- Role - Assign roles to individual users. Only displayed for admin users
- Default Lead View - Specify the lead view: today, last 2 days or last week

Calendar Settings

You can configure your calendar according to your preferences. You can set up Reminder Interval, Default calendar View, Time Zone and many more.

▾ Calendar Settings			
Starting Day of the week	Sunday	Day starts at	09:00
Date Format	yyyy-mm-dd	Calendar Hour Format	12
Time Zone	(UTC) Coordinated Universal Time, Greenwich Mean Time	Default Calendar View	Today
Default Call Duration (Mins)	5	Other Event Duration (Mins)	5
Default Event Status	Select an Option	Default Activity Type	Select an Option
Popup Reminder Interval		Hide Completed Calendar Events	No

- Starting Day of the week - Set-up your start day of week. For Instance, If your working day starts on Monday, you can select Monday
- Date Format - Select desired date format
- Day Starts at - Customize your working hour on calendar view
- Time Zone - Select desired time zone
- Calendar Hour Format - Select either 12 hour or 24 hour time format
- Default Call Duration - Automatically update End Date and Time for calls.
- Other Event Duration - Automatically update End Date and Time for all events other than calls.
- Default Calendar View - Comodo supports different views in Calendar module. Select preferred view from the drop-down to make it default view
- Default Event Status - Setup your default event status: Planned, Held, Not Held
- Default Activity Type - Setup your default activity types: Call, Meetings, Mobile Call
- Popup Reminder Interval - Setup time interval for event reminder pop-up to appear again after it is closed
- Hide Completed Calendar Events - If checkboxed, the completed calendar event will not be shown in the calendar

Currency and Number Field Configuration

Allows to configure currency format, digit and decimal separator, symbol placement etc. You can configure currency as per the requirement. It is useful for managing modules like Invoices, Quotes, Sales and Purchase Orders.

▾ Currency and Number Field Configuration			
Currency	USA, Dollars	Digit Grouping Pattern	123,456,789
Decimal Separator	.	Digit Grouping Separator	,
Symbol Placement	$1.0	Number Of Currency Decimals	2
Truncate Trailing Zeros	No		

- Currency - Select desired currency for the drop-down. However, the values will be saved according to base current rates. Default = USA, Dollars. See **CRM settings** to add more currency.
- Digit Grouping Pattern - Select digit group separator that is often used when displaying large numbers, to make them easier to read.
- Decimal Separator - Select a decimal point from drop-down to use between the integer and the fractional parts of a decimal
- Symbol Placement - Select a value from drop-down to have currency symbol before or behind the currency value
- Digit Grouping Separator - Select a decimal point from drop-down it to display large numbers, to make them easier to read.
- Number of Currency Decimals -Select the number of decimals you would like to have after a currency value
- Truncate Trailing Zeros - If checkboxed, values will be truncated in all decimal fields, currency fields and percentage fields. Note: The currency field will have two decimal places by default and Truncate trailing zeros will not affect that default value.

More Information

Allows you manage your personal information like number, email, signature etc.

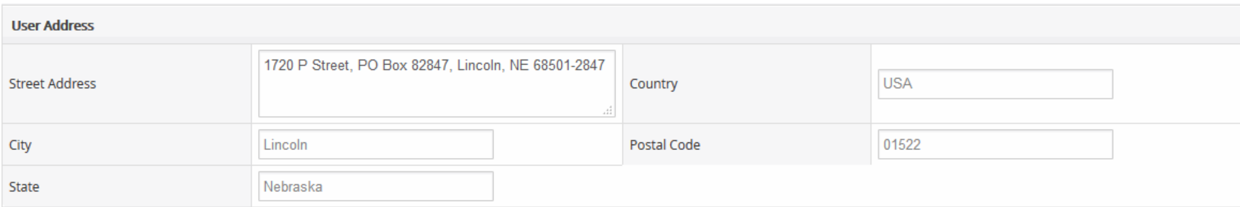
More Information			
Title		Fax	402.472.6814
Department		Other Email	
Office Phone	402.472.2087	Secondary Email	
Mobile Phone		Home Phone	
Secondary Phone		Signature	
Documents		Internal Mail Composer	☐
Theme	Bluelagoon	Language	US English
CRM Phone Extension		Default Record View	Summary
Left Panel Hide	☐	Row Height	medium

- Title - Specify designation of the user
- Fax - Specify fax number of the user
- Department - Specify the department of the user
- Other Email - Specify the other email of the user
- Office Phone - Specify office phone number of the user
- Secondary Email - Specify secondary email id of the user
- Mobile Phone - Specify mobile phone number of the user
- Home Phone - Specify the home phone number of the user

- Reports to - Select the user(Subordinate) to whom the user reports to
- Secondary Phone - Specify the secondary phone number of the user
- Signature - Specify the signature in the text area. Your signature will be automatically embedded along with email body.
- Documents - Attach related documents of users
- Internal Mail Composer - If checkboxed, enables you to view CRM's built-in email composing window when you click on email id of records in CRM
- Theme - Select desired theme from drop-down
- Language - Select desired language from the drop-down
- CRM Phone Extension - Specify a CRM phone extension of the user
- Left Panel Hide - If checkboxed, it hides the Left Panel Menu
- Default Record View - Choose between viewing Summary view or Detail view when you click to view a record.
- Row Height - Specify the row height between wide, medium, narrow

User Address

Allows you to update your address details like city, state, country, etc.

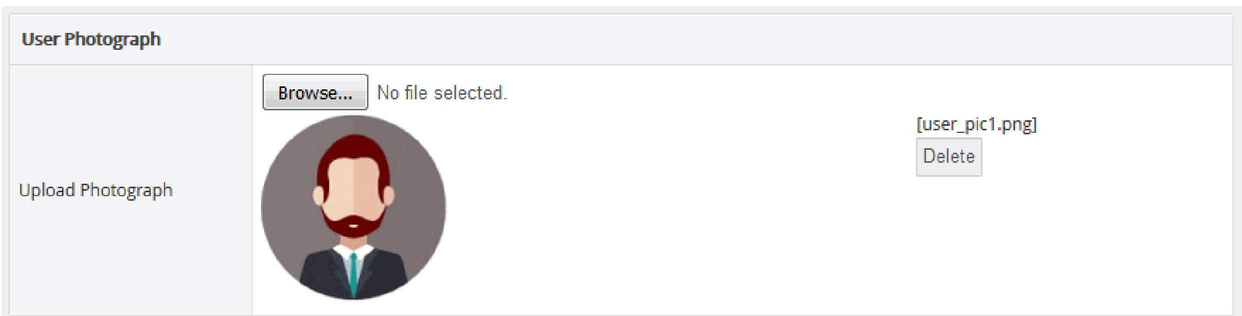


- Street Address - Specify a street address of the user
- Country - Specify the user's country name
- City - Specify a name of the city where a user lives
- Postal Code - Specify a postal code of the user's address
- State - Specify a name of the state where the user lives

User Photograph

Allows you to upload a user's photograph.

- Click 'Browse' to navigate a user's photograph



- Click the 'Delete' button to remove form preferences.

User Advanced Options

Displays the access key for a user to starts a client session with server.

Tag Cloud Display

Helps you find records that are otherwise not easily searchable. In the new user interface, you can tag records and quickly access them from the Tag Cloud widget on the Home page.

2.3. Use Search Option and Filter Option in CRM

CRM provides the following advanced searching and filtering options:

- **Global search**
- **Search in a selected module**
- **A custom search**
- **Custom search in the Module**

Global search

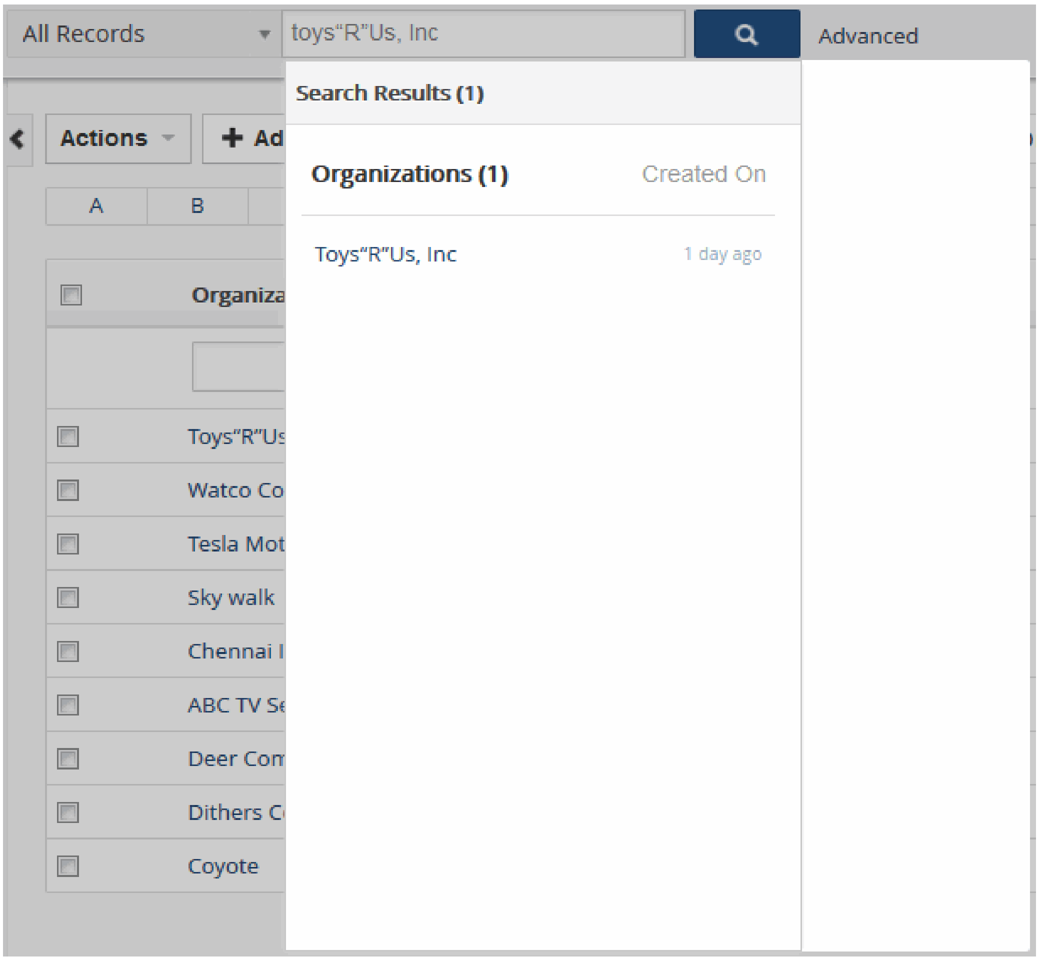
The Global Search in CRM helps you find what you need on your CRM account. For the given search query, global search fetches relevant information from across all modules in your CRM account. In contrast to other search options, your search query is matched against all records in your CRM and results are displayed on a single screen. Additionally, to refine your search, you can also search for records in a selected module.

You can access a global search in the search bar located on top center of each CRM screen. Now you can search for records by phone numbers or email addresses, and more.

To do that,

- Type your search query in Global Search bar and click Enter

Your search results are categorized according to modules they belong to.



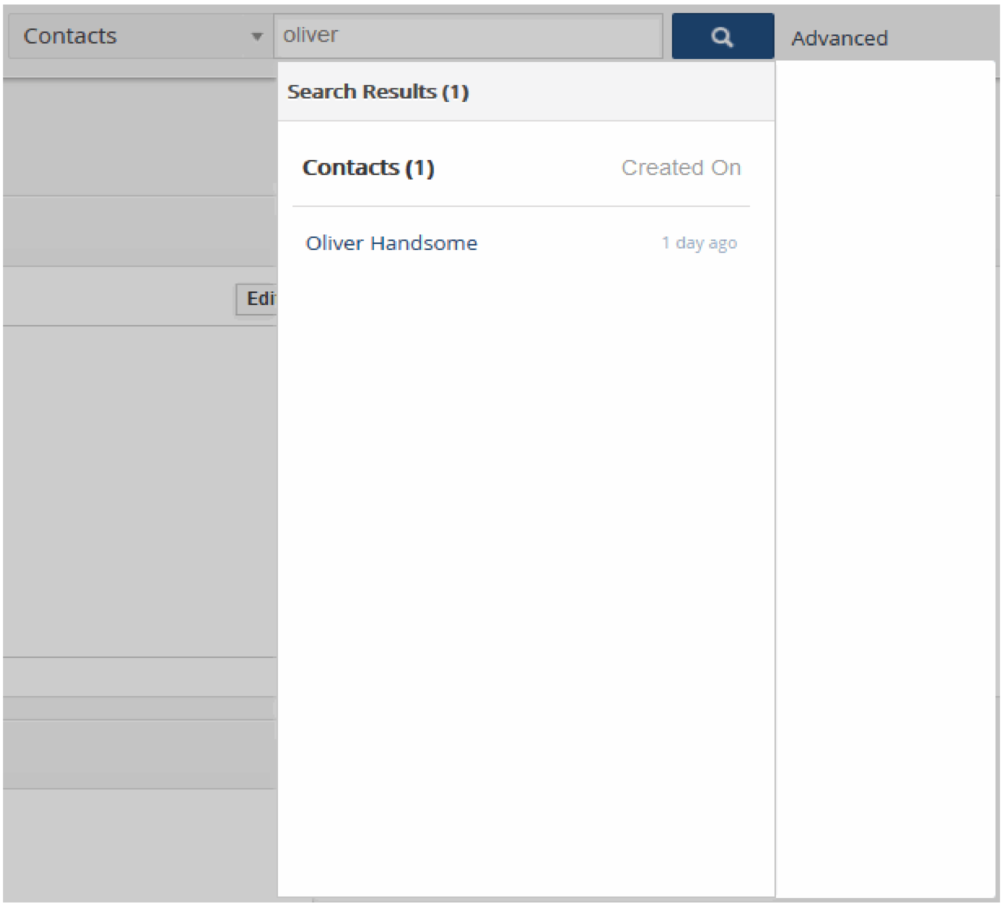
Note:

- You can also search for information in your custom fields
- Global Search is NOT case sensitive

Searching a record in a selected module

It allows you to search for records in a selected module. If you are sure that your record is saved in a particular module, you can refine your search by selecting that module from the global search bar.

- In the Global Search bar, select a module from the 'All Records' drop-down
- Type a search keyword in the Global search bar then click the search button
- Alternatively, click 'Advanced' to use a advanced search.

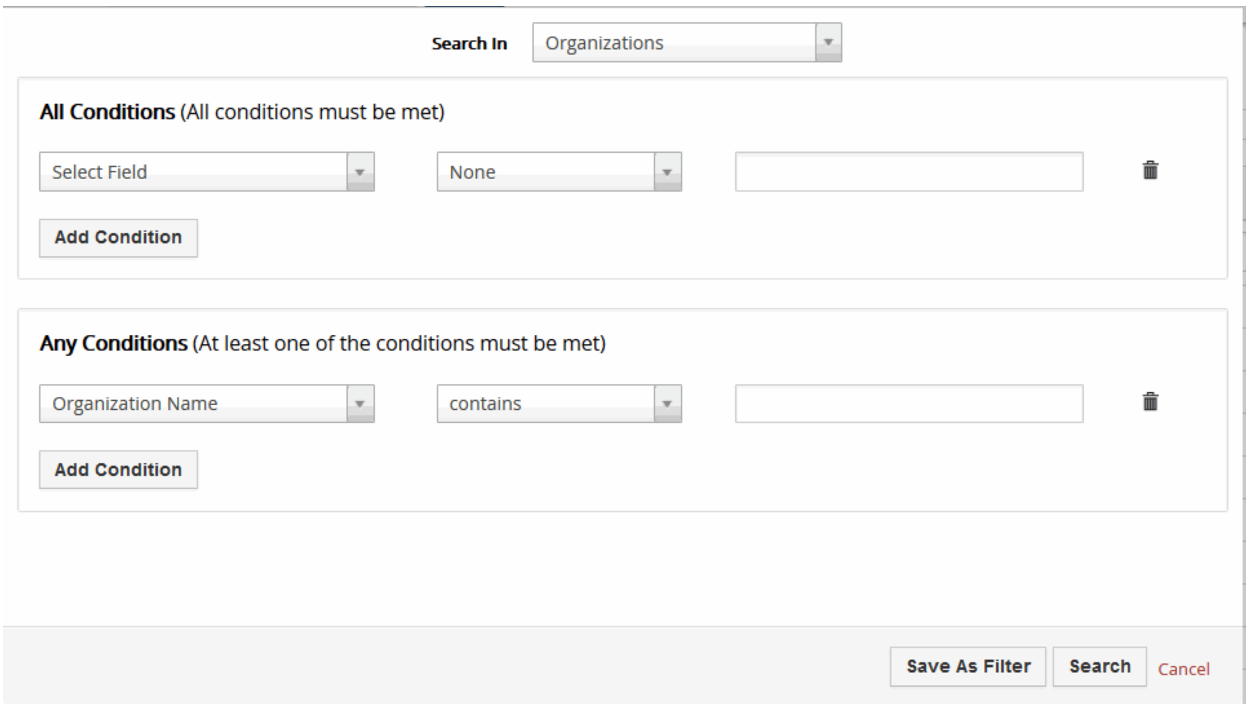


Configure a custom search

This feature allows you set more specific criteria according to your requirements and to view desired fields in your search results opposed to fields that are displayed by default. You can create a filter and make it your default filter.

- Click the 'Advanced' beside the Global search bar

The 'Advanced' search filter form will be displayed.



- In the 'Search In' drop box, select the module the custom filter is created
- Select a field under 'All Conditions' on which the search will be performed
- Select roles or conditions with the search
- If you would like to save this advanced search for future use, you can turn it to a list view filter, click the 'Save as Filter' button on the bottom
- Click the 'Search' to perform your advanced search

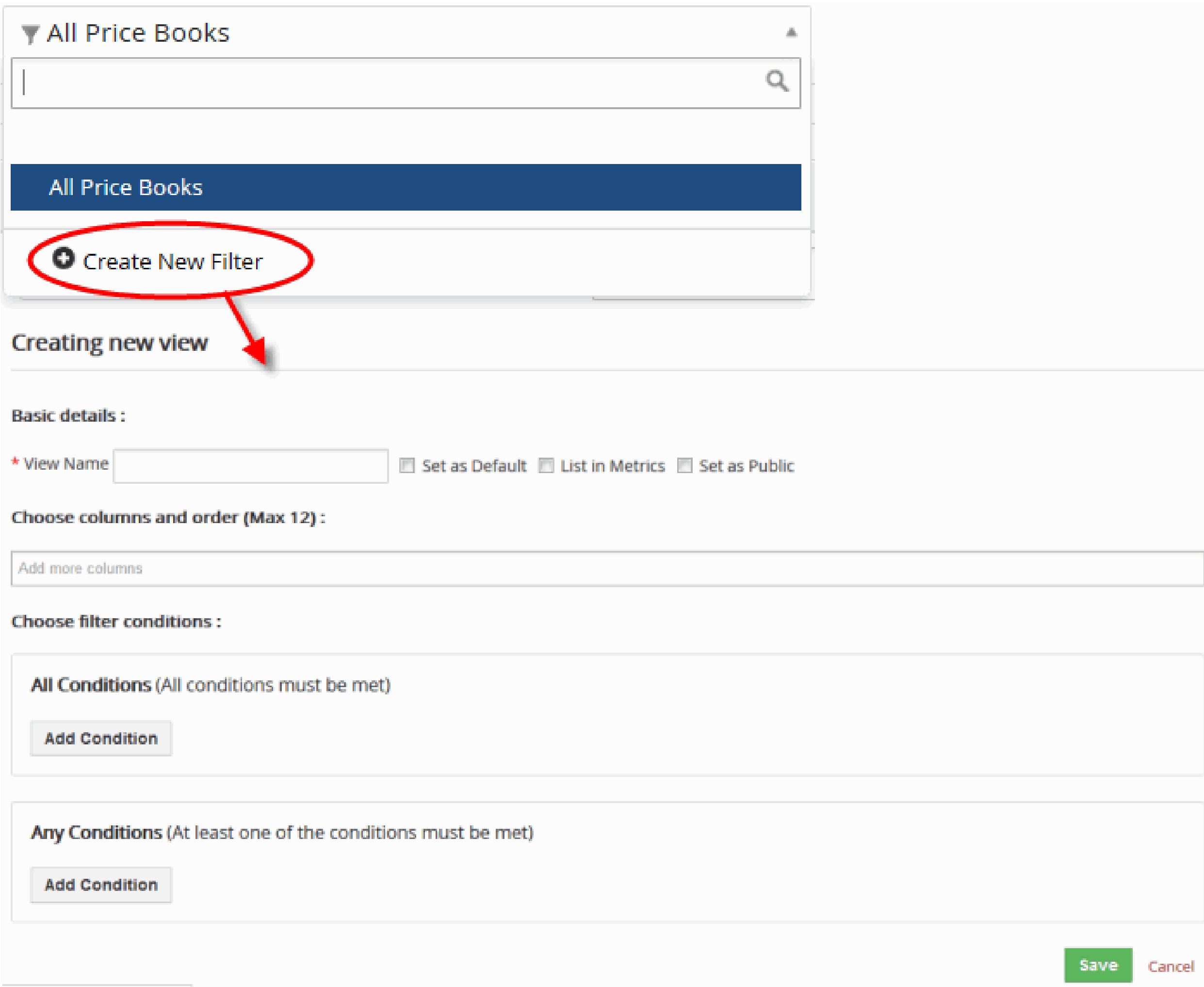
You can also search add create filters once already in a module. In our example, we use a Book Price module which has a few search options:

10. Click on a letter in alphabet above the list view to open the list of price books with the selected letter
11. To list records meeting certain conditions as mentioned above in the Advanced search

You can create a filter for a module view using a drop-down menu above the listed alphabet which lists any created filters and an option to create a new filter.

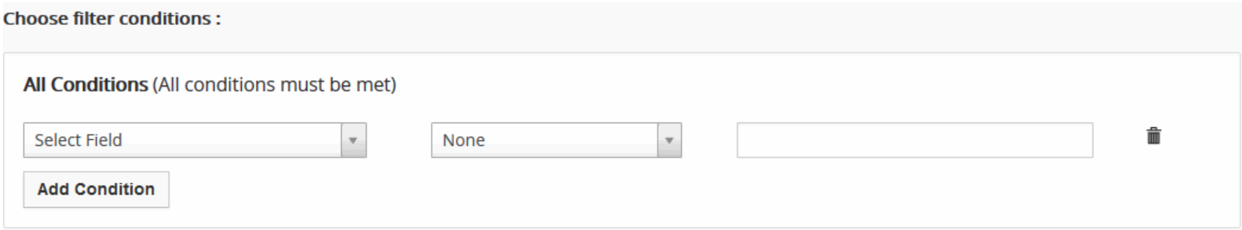
- Click the 'Create New Filter'

The 'Creating new view' form will open.

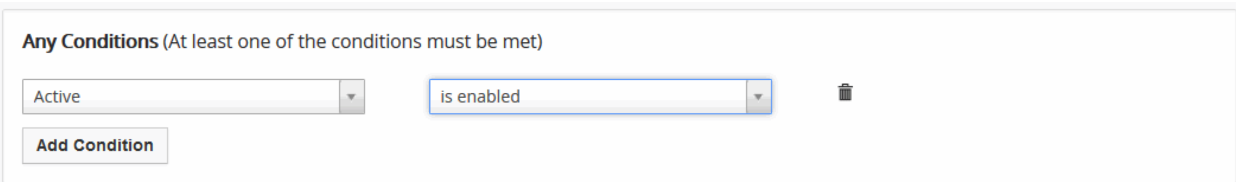


- **Basic details:**
  - View Name - Type the filter name and set a filter to your business requirements:

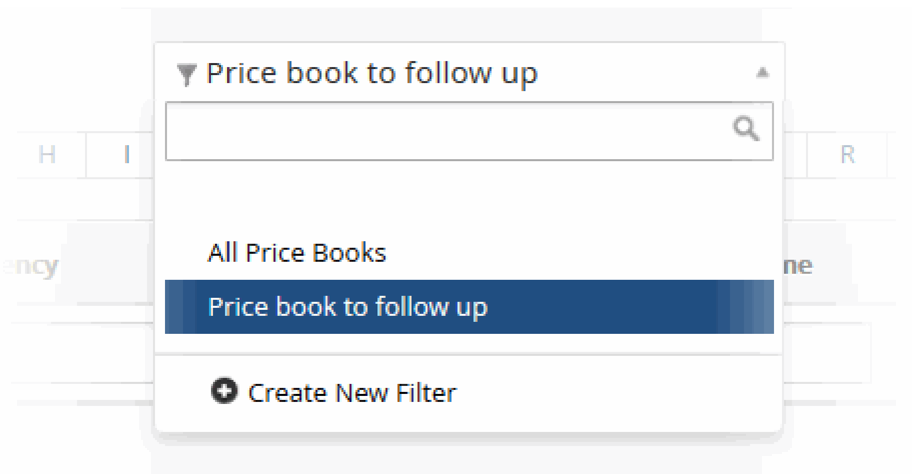
    - Set as Default - Creates filters and set the filter default so that you can view only most important records. By clicking on the check-box, the filter will be made default for you and other users in your CRM account. It is useful if you have thousands of records in your CRM. You don't deal with all of them.
    - List in Metrics - Enable the check-box to view details of your filter in Key Metrics widget on the home page.
    - Set as Public - Enable the check-box to make the filter visible for all users across your CRM account. If a non-admin user enables this option, the filter will be in a pending state until admin approves it. Admin users can approve the filter by clicking on icon next to the filter.
- **Choose columns and order (Max 12):** Select desired columns you would like to see in a custom view. Maximum up to 12 columns
- **Choose filter conditions:** specify conditions to filter only specific entities that you would like to have in your custom view
    - All Conditions (All conditions must be met)



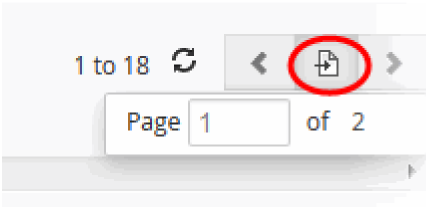
    - Any Conditions (At least one of the conditions must be met)



    - Click 'Add Condition' to add more conditions
    - Click the trash can icon beside a condition to remove it from the filter
- Click 'Save' and you will be taken to the list view with your filter applied. It also will be added to the advanced drop-down

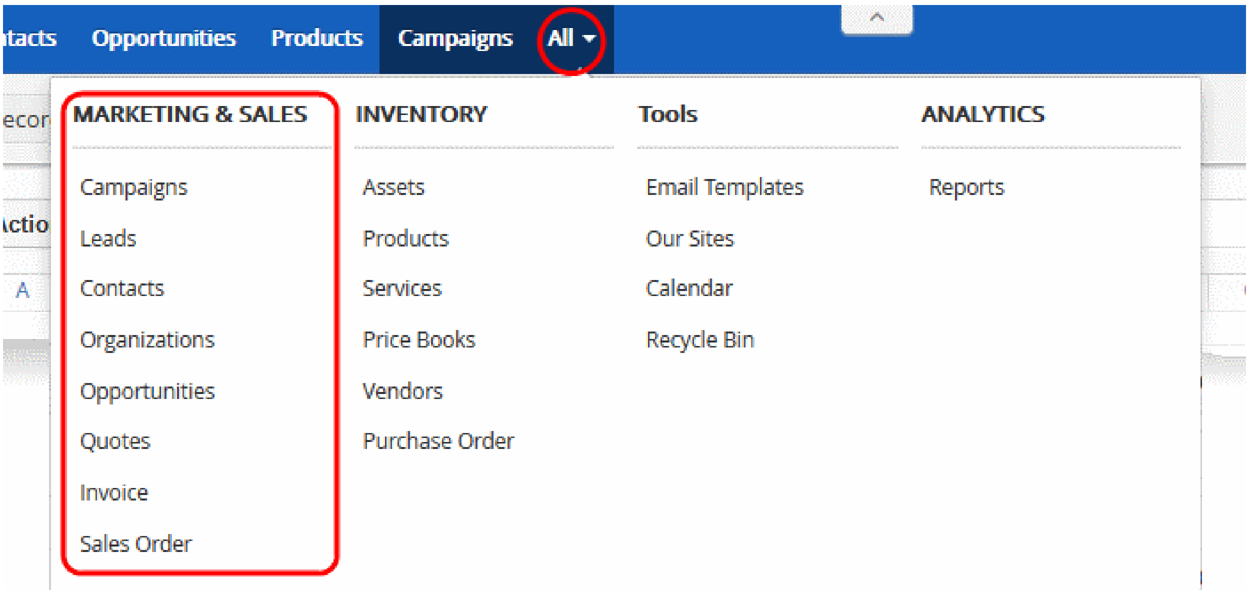


When navigating through large lists, if you need to jump to a specific page, you can use the new Page Jump feature at top right corner.



3. Marketing and Sales

The Marketing and Sales area allows you to manage campaigns, leads, sales opportunities, quotes and more.



The 'Marketing and Sales' category contains the following modules:

- Campaigns
- Leads
- Organizations
- Contacts
- Opportunities
- Quotes
- Invoices
- Sales Orders

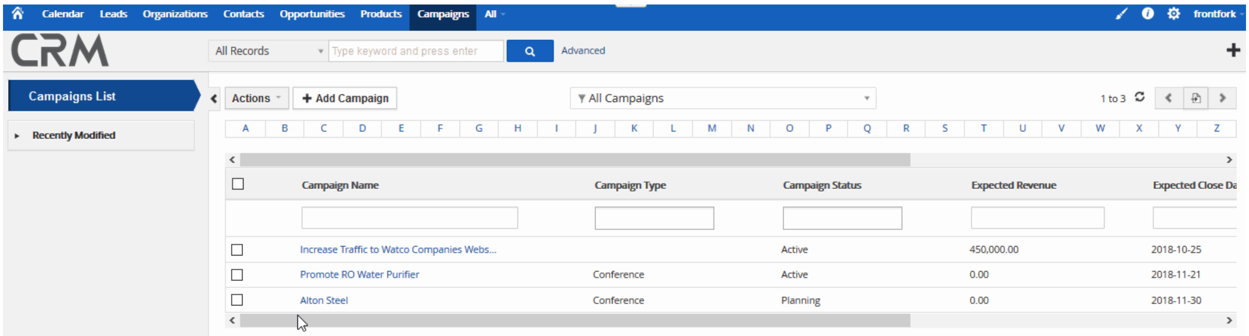
3.1. Manage Marketing Campaigns

The 'Campaigns' module offers your marketing team the ability to schedule and execute mass marketing campaigns. CRM helps you create, track, and optimize these initiatives. Your campaign goals will depend on the priorities of your organization, and can include raising brand awareness, obtaining new leads, converting leads to sales, or encouraging existing clients to purchase more products or services.

Many campaigns also have lists of leads or contacts associated with them. These leads or contacts will then have a marketing function performed on them (a phone call, an email, a piece of mail, etc.) and responses will be recorded on each client record. These lists can be associated with campaigns in CRM.

The 'Campaigns' area allows you to add and manage records of new campaigns, associate them with contacts, leads, opportunities, and customer organizations. You can add events and reminders to each campaign and update campaign activities in order to track your progress.

- Click 'All' on the title bar and choose 'Campaigns' under 'Marketing and Sales' to open the 'Campaigns' interface



By default, the list of all campaigns will be displayed with the following details.

Campaigns List - Column Descriptions	
Column Header	**Description**
Campaign Name	The name assigned to the campaign
Campaign Type	The campaign channel or medium. For example, 'Webinar', 'Direct Mail', 'Telemarketing' etc.
Campaign Status	Campaign status as last updated by the staff member to whom the campaign is assigned.
Expected Revenue	Projected revenue as entered when the campaign was created or modified.
Expected Close Date	Scheduled completion date of the campaign.
Assigned to	Staff member to whom the campaign is assigned.

- Click any column header to sort the table according to the items in the column.
- To search for a specific item, enter the search criteria in the respective column header(s) and click 'Search' at the right end of the column header.
- For more details on Advanced filter options, see the section **Custom Views.**

Custom Filter View

The 'Campaign List' interface allows you to create custom views. For example, you may want to view only those campaigns assigned to you, and only view selected columns like campaign name, campaign type and target audience.

You can create any number of views, and can make any view your default. See **Custom Views** for more details.

The following sections explain more about:

- **Add Campaign Records**
- **Track Campaigns**
- **Associate Records from other Modules**

3.1.1. Add Campaign Records

CRM allows you to effectively track the progress and outcome of any marketing campaign conducted by your company. Campaigns details can include the product/service promoted, the medium or channel of the campaign, target audience, budgets, expected sales results, return on investment (ROI) and more. These details can be dynamically updated as the campaign progresses.

You can create campaign records in three ways:

- **Creating a new campaign record by manually entering the details -** Setup a new campaign record and specify all its details. See **Create a New Campaign Record** for details.
- **Quick create a record -** Create a new campaign record with only the details you require. Other details can be added later as the campaign gains momentum. See **Quick Create a Campaign Record** for details.
- **Cloning a record -** Duplicate an existing record and use it as a starting point to create a new record. See Clone a Campaign Record for details.

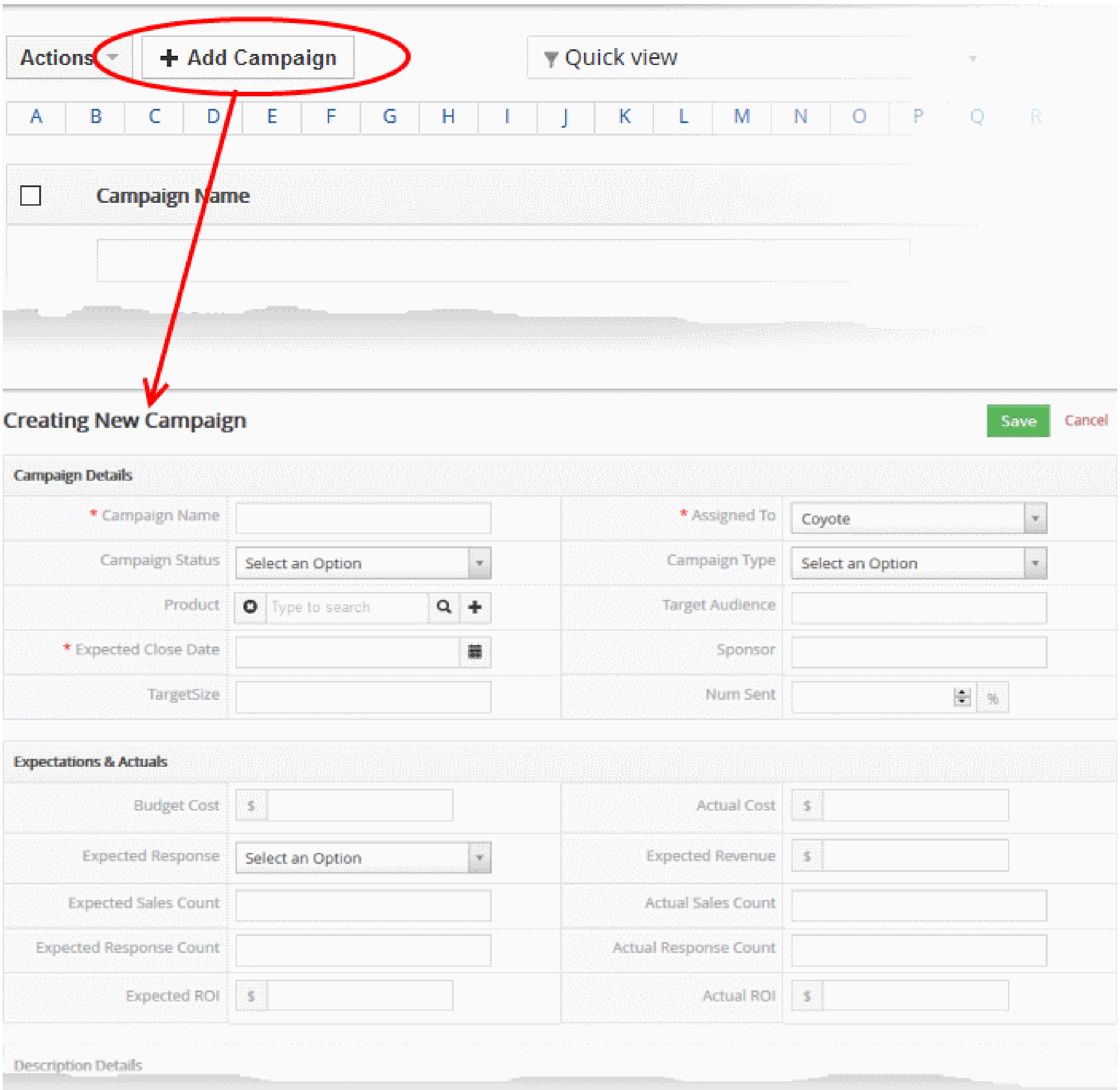
Once a Campaign record is added to the 'Campaign List', you can:

- Track the progress and the responses to the campaign and update the details till the completion. See **Tracking Campaigns** for more details.
- Add activities like scheduling events, meetings and more for the campaign. The scheduled activities will be reflected in the calendar of the staff member to whom the campaign is assigned for effective tracking. See the explanation under Adding Activities for a Campaign in the section **Tracking Campaigns** for more details.
- Associate contacts, leads, organizations and opportunities based on campaign responses and initiate automated emails to them as a part of the campaign activities. See **Associate Records from other Modules to a Campaign** for more details.

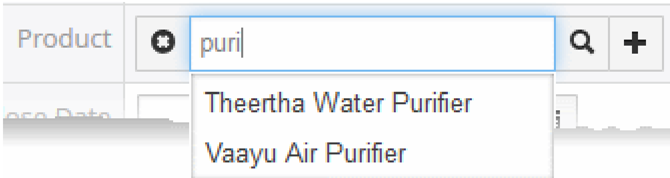
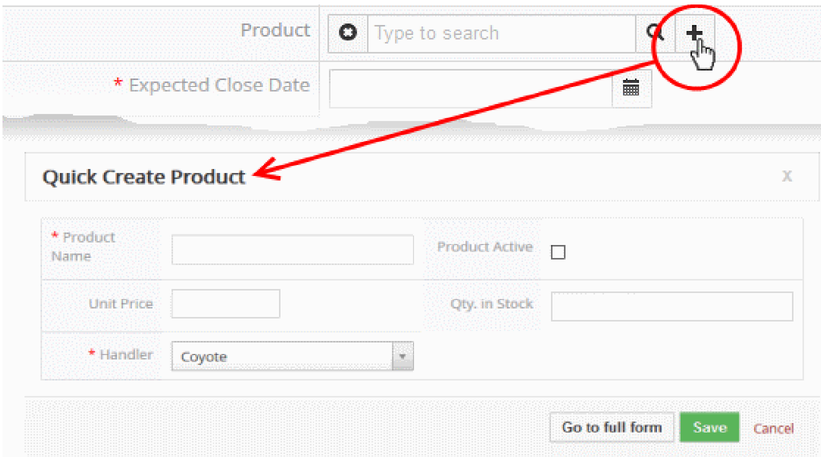
Create a New Campaign Record

- Click 'All' on the title bar and choose 'Campaigns' under 'Marketing and Sales' to open the 'Campaign List' interface
- Click the 'Add Campaign' button

The 'Create New Campaign' dialog will open to fill in the campaign details and create the campaign record.



Create New Campaign - Form Parameters	
Form Parameter	**Description**
Campaign Details	
Campaign Name	Specify a name for the campaign record, shortly describing the campaign
Assigned to	Choose the staff member assigned to coordinate the campaign. The selected staff member will be able to access the campaign and update the details along the progress and associate records like leads, contacts and opportunities for further campaign activities like sending automated emails and more.
Campaign Status	Select the current state of the campaign. The available options are: • Planning • Active • Inactive • Completed

	• Cancelled Administrators or the assigned staff member can change the status along the progress of the campaign. See **Track Campaigns**.
Campaign Type	Choose the channel or medium through which the campaign is conducted.
Product	Specify the product or service being promoted by this campaign. For products already added to CRM: • Type few letters of the name of product/service as search criteria and choose the item from the options  For new products/services: • Click the '+' button and enter the details of the product/service in the 'Quick Create Product' dialog.  See **Create a Product** for more details. The newly added product will also be added to the 'Products' module for management.
Target Audience	Specify the type of target audience in the target market, to which the campaign is aimed.
Expected Closing Date	Specify the tentative date at which the campaign is planned to be concluded.
Sponsor	Specify the sponsor who has made financial commitment for the campaign.
Target Size	Specify the number of audience count, to whom the campaign is expected to reach.
Num Sent	Number of emails sent for the campaign.
Expectations & Actuals	
Budget Cost	Enter the amount of money allotted to be spent fro the campaign.
Actual Cost	Enter the cost incurred so far for the campaign. The cost can be updated along

	with the progress of the campaign. See **Track Campaigns**.
Expected Response	Choose the degree of response you expect to receive for the campaign from the audience
Expected Revenue	Enter the amount of money you expect to generate as revenue at the end of campaign.
Expected Sales Count	Enter the number of products that you plan to sell during this campaign.
Actual Sales Count	Enter the number of products that were actually sold because of this campaign. The count can be updated along with the progress of the campaign. See **Track Campaigns**.
Expected Response Count	Enter the number of responses you expect to receive from the audience for this campaign.
Actual Response Count	Enter the number of responses you actually received from the audience for this campaign. The count can be updated along with the progress of the campaign. See **Track Campaigns**.
Expected ROI	Specify the ROI that you expect from the campaign.
Actual ROI	Specify the actual ROI you received from this campaign. The ROI can be updated at anytime along with the progress of the campaign. See **Track Campaigns**.
Description Details	
Description	Enter a description for the campaign.

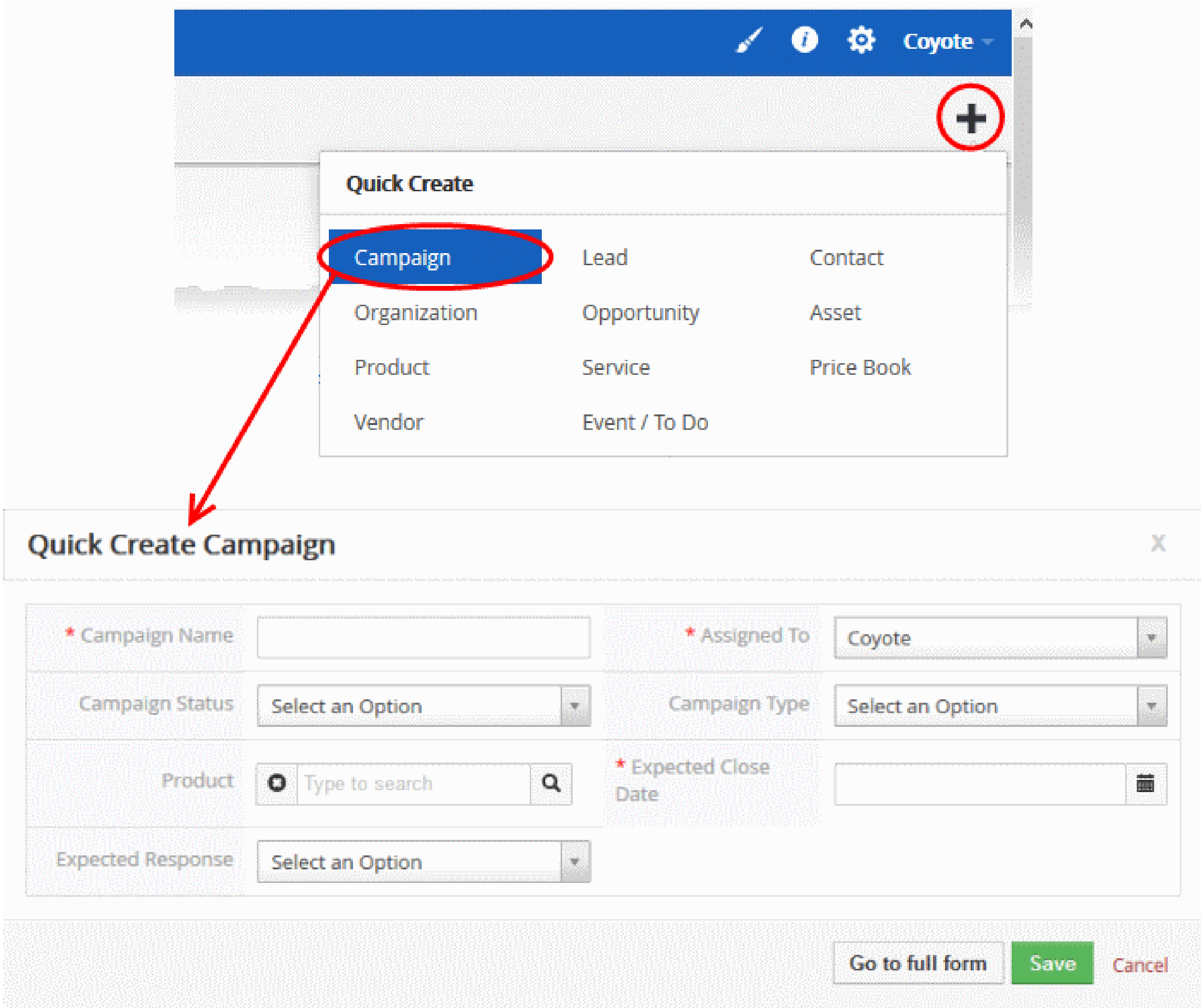
- Fill up the form with the details of the campaign and click 'Save'

The campaign record will be saved and added to the list of campaign records in the 'Campaigns List' interface.

Quick Create a Record

The 'Quick Create' option allows you to create a campaign record from any interface, within a short time. It requires you to enter only the basic details.

- Click the '+' button at the top right from any interface of CRM and choose 'Campaign' from the options.



- Fill-in the campaign details in the Quick Create Campaign dialog. Descriptions of the form parameters are available in the **table above**.
- If you want to view and enter all details, click 'Go to the full form'
- Click 'Save'

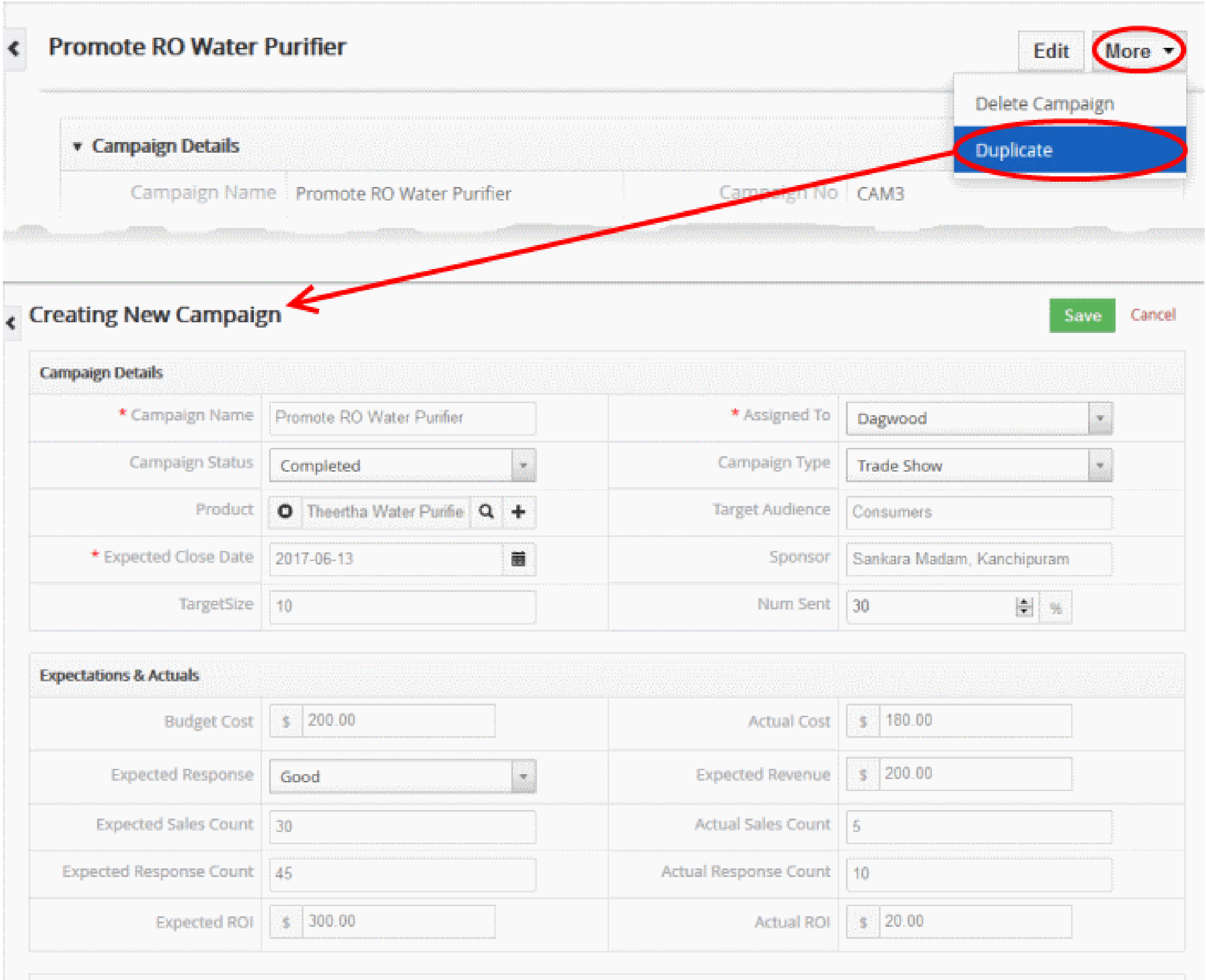
The record will be saved and added to the list of campaign records in the 'Campaigns' interface. You can open the details interface for the record by clicking the campaign name and add/edit the details as required at anytime.

Clone a Campaign Record

CRM allows you to create a new campaign record using an existing record as a template. You can then edit the cloned record according to the requirements of your new campaign. This is useful when you are creating a campaign record for a product/service for which a campaign exists already, for a new type of audience, using a new campaign type and more.

To clone a campaign record

- Click 'All' on the title bar and choose 'Campaigns' under 'Marketing and Sales' to open the 'Campaign List' interface
- Click on the name of the campaign record you want to clone to open the the 'Campaign Details' interface
- Click 'More' on the top right and choose 'Duplicate'



The 'Creating New Campaign' form will open with the details populated from the original record.

- Enter a new name for the new campaign
- Edit the details as required. Descriptions of the form parameters are available in the **table above**.
- Click 'Save'.

The campaign record will be saved and added to the list of campaign records in the 'Campaigns' interface.

3.1.2. Track Campaigns

The 'Campaign Details' interface of a record allows you to view and update details such as cost, sales, ROI and more. It also allows you to schedule activities like events, meetings, phone calls etc., to the campaign record. The activities will be reflected in the calendar of the administrators and the staff member assigned to coordinate the campaign.

You can associate records like contacts, leads, opportunities and organizations from other modules and initiate sending automated emails to them, as a part of campaign activities.

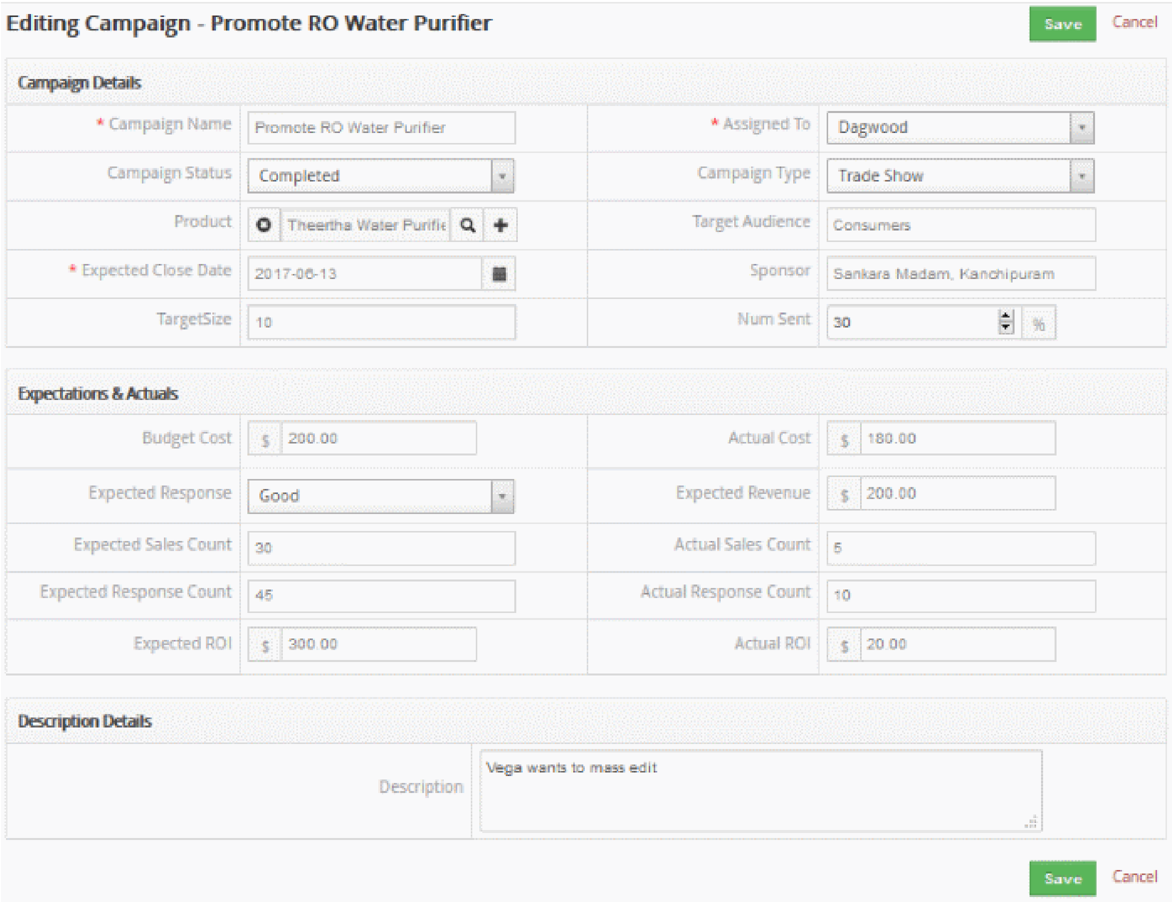
To view campaign details:

- Click 'All' > 'Campaigns' (under 'Marketing and Sales') to open the 'Campaign List' interface
- Click on a campaign name to view it's current details.

To edit a campaign

- Click 'All' > 'Campaigns' (under 'Marketing and Sales') to open the 'Campaign List' interface
- Click the 'Edit' button

  OR
- Click 'All' > 'Campaigns' (under 'Marketing and Sales') to open the 'Campaign List' interface
- Place your mouse cursor over the name of a campaign to reveal the action buttons on the right of the row.
- Click the 'pencil' icon to open the campaign edit interface:



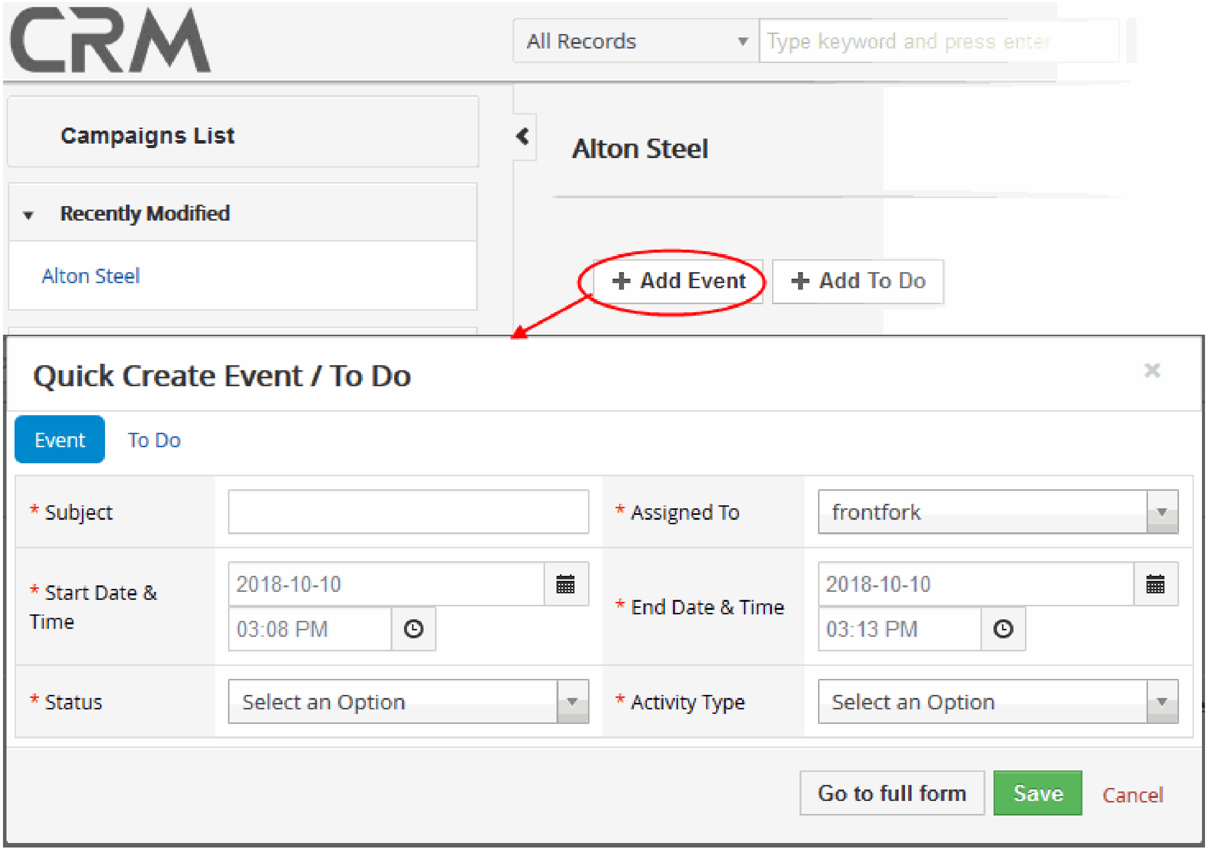
- See **this table** for descriptions of the fields in the 'Campaign Details' interface
- Administrators can edit a campaign to update it with the latest campaign progress

Activities

Activities consist of 'Events' (meetings, calls, webinars etc) and 'To Dos' (product delivery, purchase etc). Administrators can add 'Activities' to a campaign and these will be added to the CRM calendar. Activities can be viewed by administrators and the staff members to whom the campaign is assigned. Assigned staff and administrators can add an 'Event' or 'To Do' as an activity of a campaign record.

To create an Event/To Do:

- Click 'All' > 'Campaigns' (under 'Marketing and Sales') to open the 'Campaign List' interface
- Choose a campaign then click 'Activities' from the menu on the right
- Click 'Add Event' or 'To Do' in the activities interface.



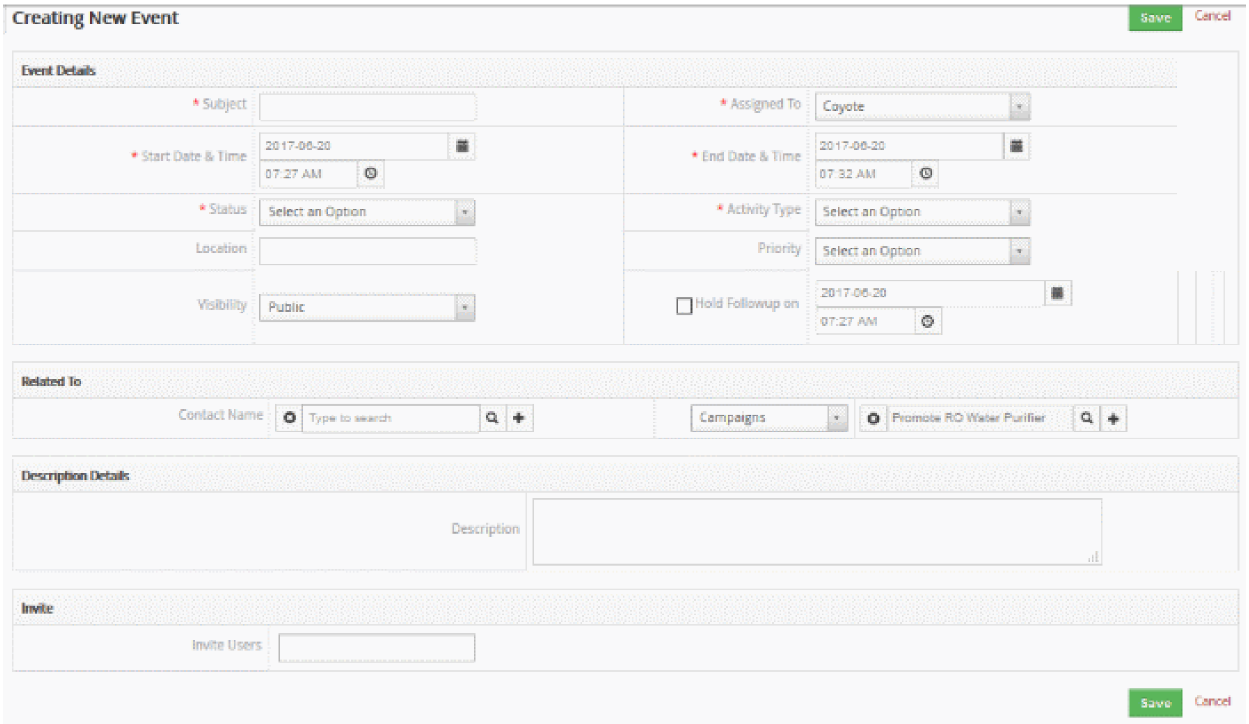
The event / to-do dialog will open:

- Complete your event details and click 'Save'.

Please note that the 'Activity Type' option is only available for quick events.

The information in the quick event dialog is basic in nature and will be used to populate the calendar entry. Use the 'full form' if you want to create a detailed event with more information (priority, visibility etc).

- To create a detailed event, click the 'Go to full form' button in the quick event dialog:



- Enter the required details and click 'Save'.

See the section **Manage Calendar List** for more details on the 'Event/To Do' full form.

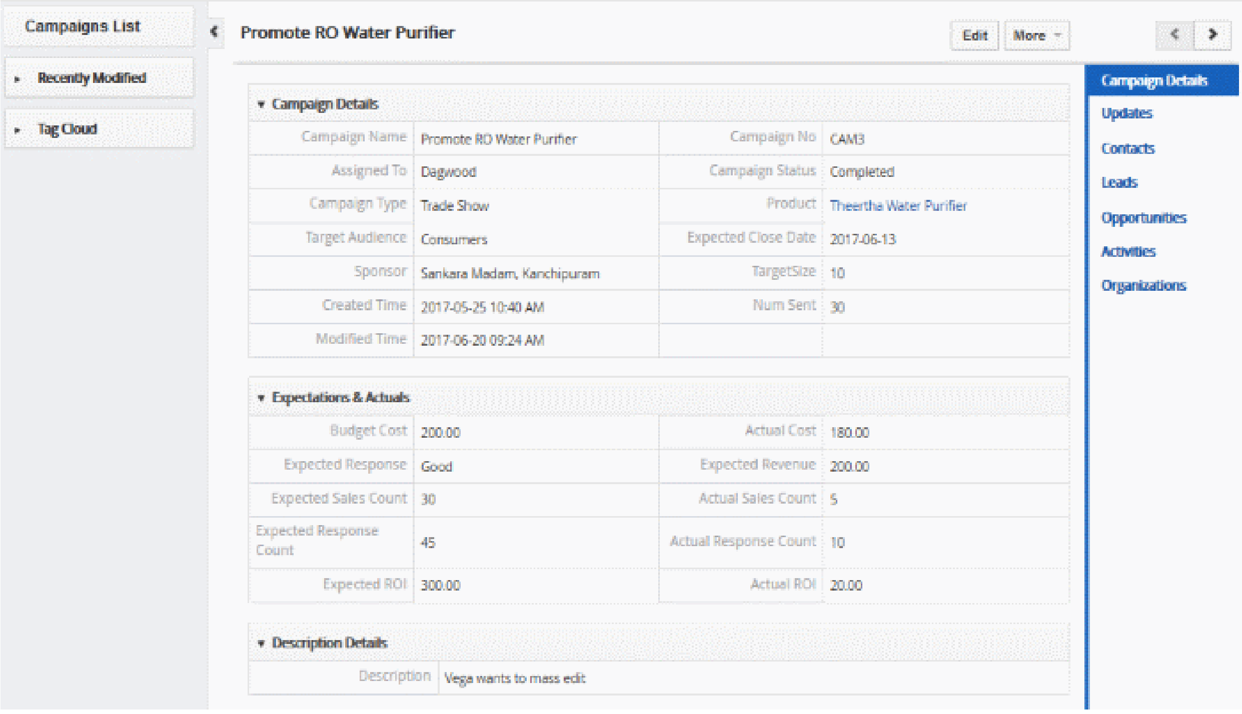
3.1.3. Associate Records from other Modules to a Campaign

The 'Campaigns Details' interface lets you associate records from various CRM modules (contacts, leads, opportunities, customer organizations) with a campaign record. Administrators can view and manage these records and can initiate campaign emails to the prospects.

To view and manage the contact records associated with a campaign record

- Click 'All' > 'Campaigns' (under 'Marketing and Sales') to open the 'Campaign List' interface
- Click any campaign to open the campaign's detail page.

The right of the interface contains shortcuts to the records of other modules which are associated with the campaign:



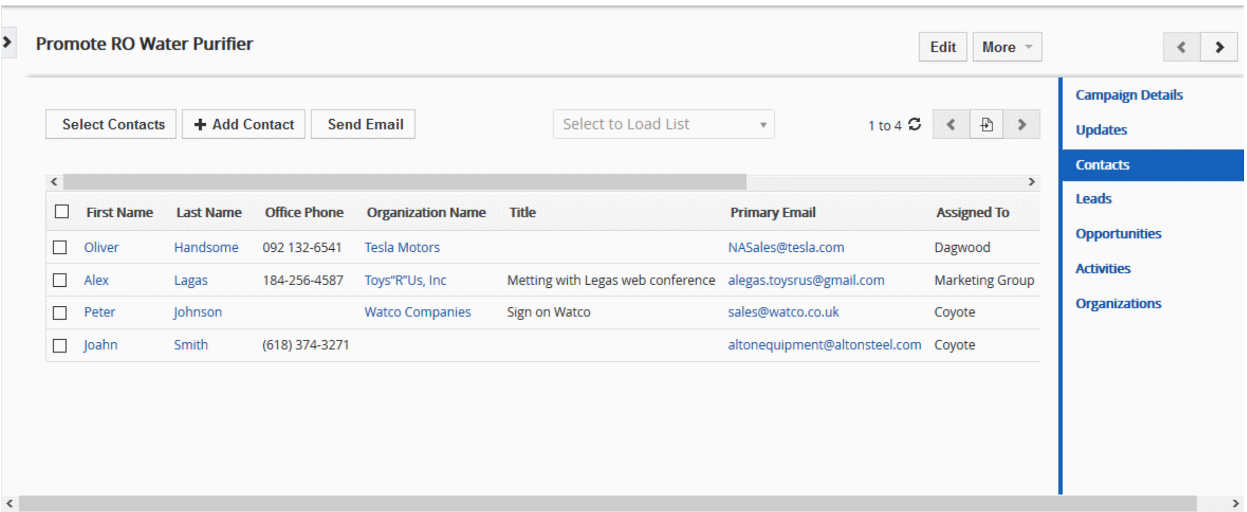
You can use these links to create records in the other modules which will be linked to the campaign.

- Contacts - Select, view, add and edit existing contacts and associate with the campaign record
- Leads - View leads which are associated with the campaign. Associate new leads with a campaign.
- Opportunities - Add and edit new opportunities associated with the campaign. Associate a new opportunity with the record.
- Activities - Schedule a meetings, calls and To-dos on the organization record
- Organizations - Create a new organization or select from existing organization records and associate with the campaign record

The example below describes how to manage the 'Contact' records associated with a campaign.

- Open a campaign as described earlier then click 'Contacts' in the menu on the right

A list of contacts already associated with the campaign record will be shown with the details of each contact.



The interface allows you to:

- **Associate new contact records to the campaign**

- **Manage selected contact record**

CRM also allows you to send emails to selected persons from any lead record. See **Emails** to know more details about sending emails.

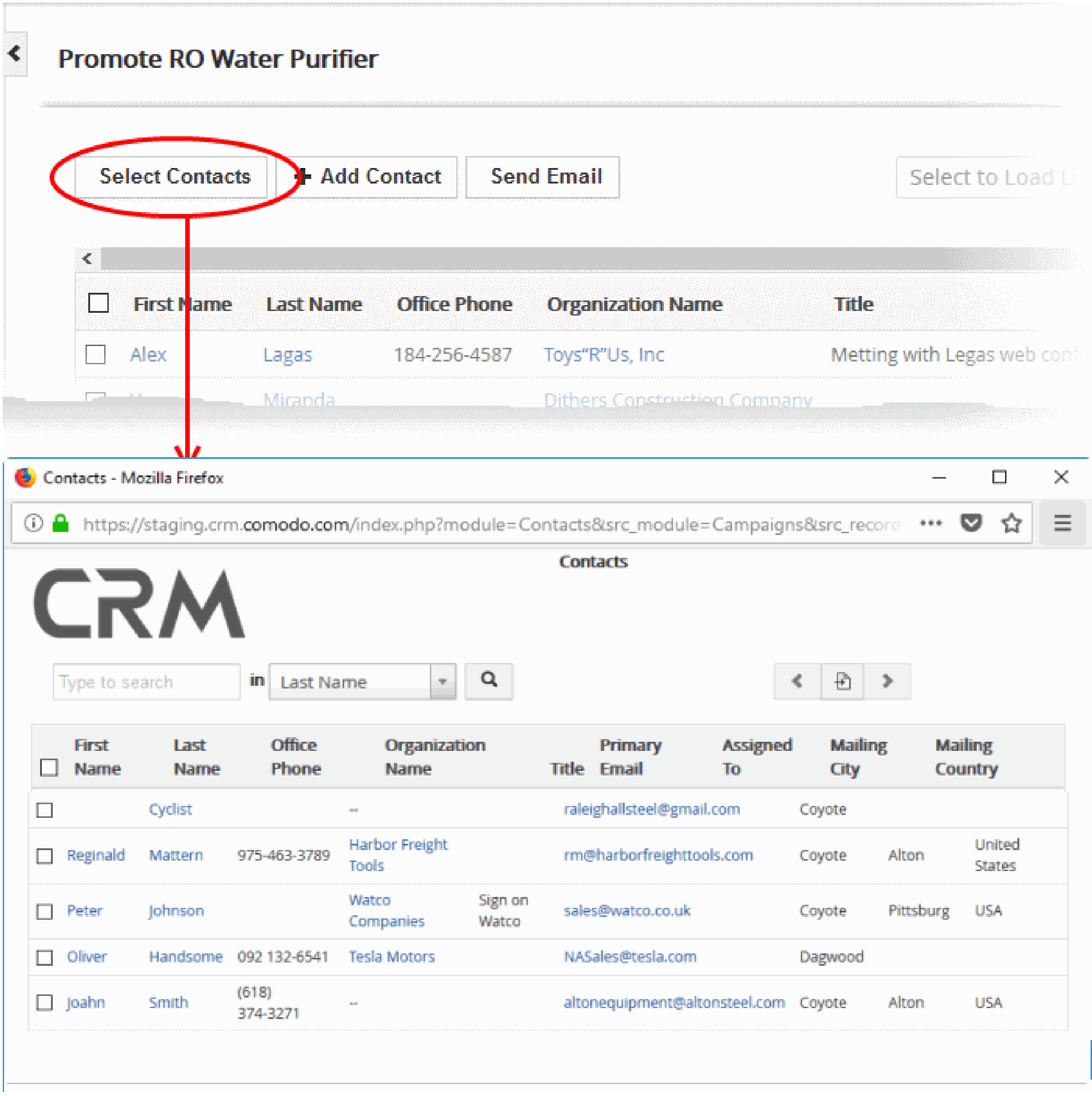
Associate Contact Records to the Campaign

You can associate contacts to the campaign in three ways:

- **Manually select contacts from records existing in CRM**
- **Add a new contact and associate with the campaign**
- **Bulk add contacts**

To manually associate contact records

- Click 'Select Contacts'



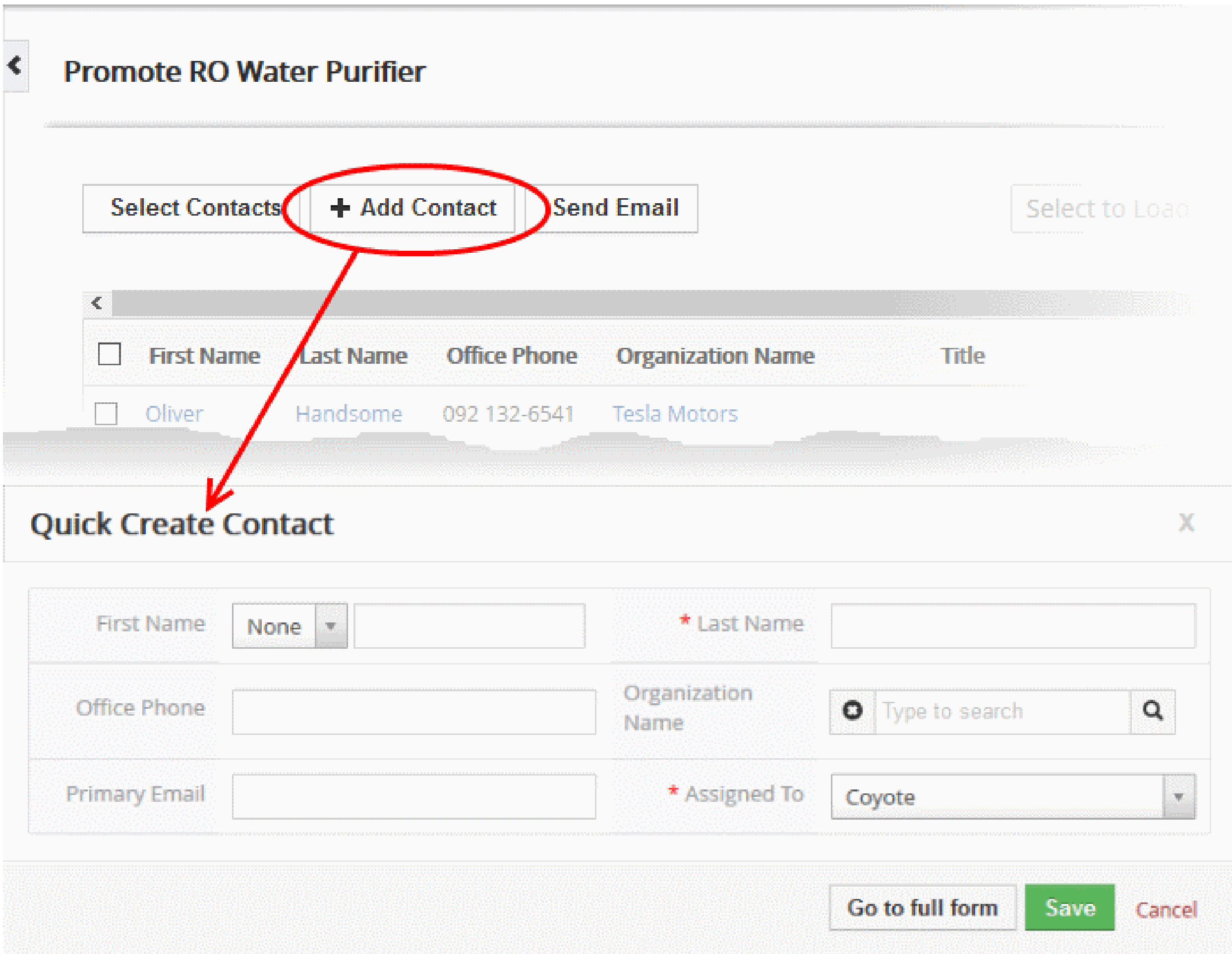
The list of contact records available will be displayed.

- Select the contact(s) you want to associate with the campaign and click the 'Select' button (top left)

The contacts will be added to the list of associated records.

To add a new contact

- Click 'Add New Contact'.



The 'Quick Create Contact' dialog will appear.

- Complete the details of the new contact and click 'Save'.

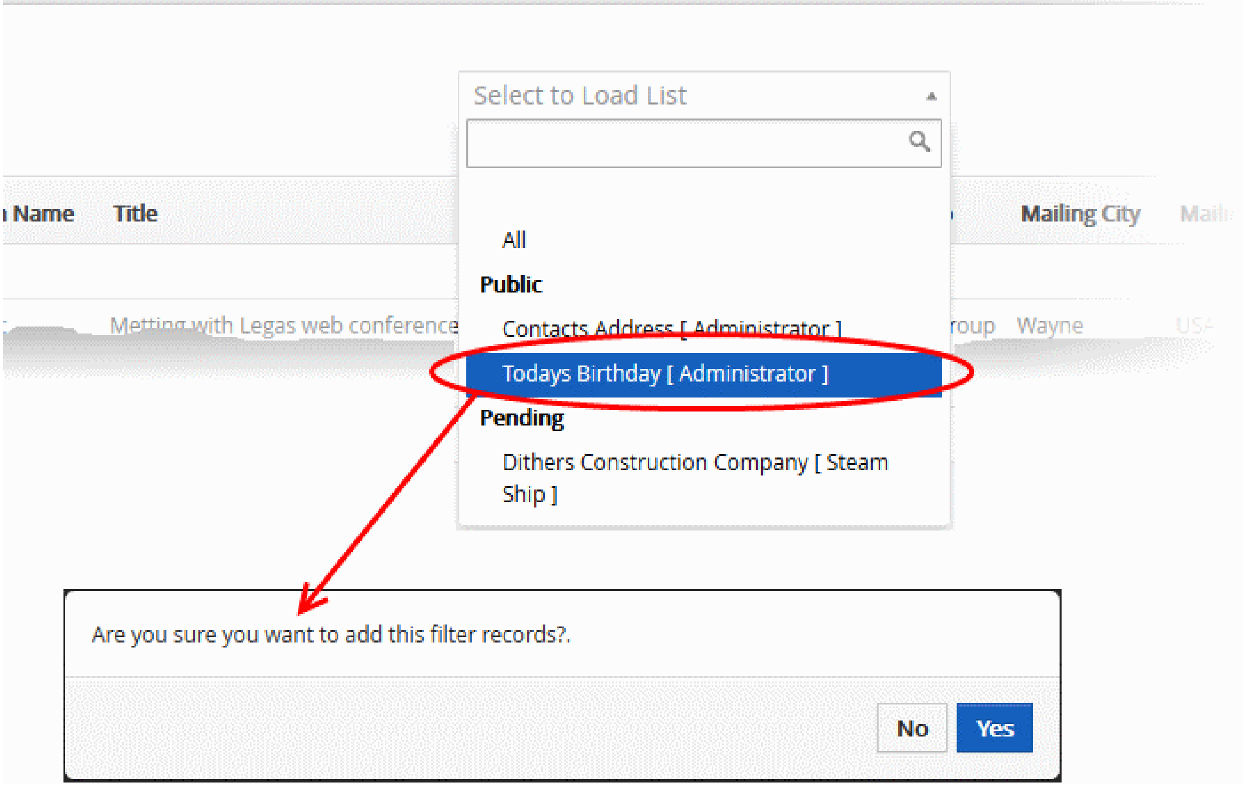
The information in the 'Quick Create Contact' dialog is basic in nature and will be used to add the new contact to the contacts module of CRM. Use the 'full form' if you want to enter more details for the contact.

To bulk associate contacts

- Click the 'Select Load List' drop-down at the top center

The filters configured for the custom view of the Contacts Module interface will be shown as options. For more details on the custom views, see the section **Custom Views**.

- Choose a filter from the drop-down

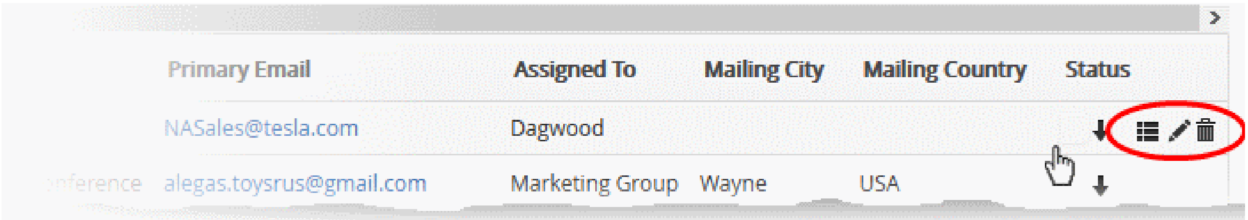


All contact entries available in the custom view of the 'Contacts' module will be imported and associated to the campaign module.

Manage Associated Contacts

You can view full details of a contact, edit a contact or dissociate a contact from the associated contacts list.

- Mouse over a contact record to view the options at the far right end of the row



- Click the respective icon for the action you want to execute on the contact

  - Opens the contact details interface of the respective contact record. See the section **Contacts** for more details.
  - Allows you to edit the contact details. See the section **Contacts** for more details.
  - Removes the contact record from the list of contacts associated with the campaign record.

In the similar manner you can associate, send emails and manage records from other modules like Leads, Opportunities and Customer Organizations to a campaign record.

3.1.4. Mass Management of Campaigns

CRM allows you to edit the details of several campaign records at once. This is useful when you are updating or altering details that are common for a selected set of campaign records. For example, you may have created several campaigns to run concurrently for the same product but with different audiences, different close dates and different expected/actual costs.

Tip: If you want to update the details of a ***single*** campaign record:

- Open the 'Campaign List', click the campaign name then click the 'Edit' button.
- See **Tracking Campaigns** for more details.

The interface allows you to:

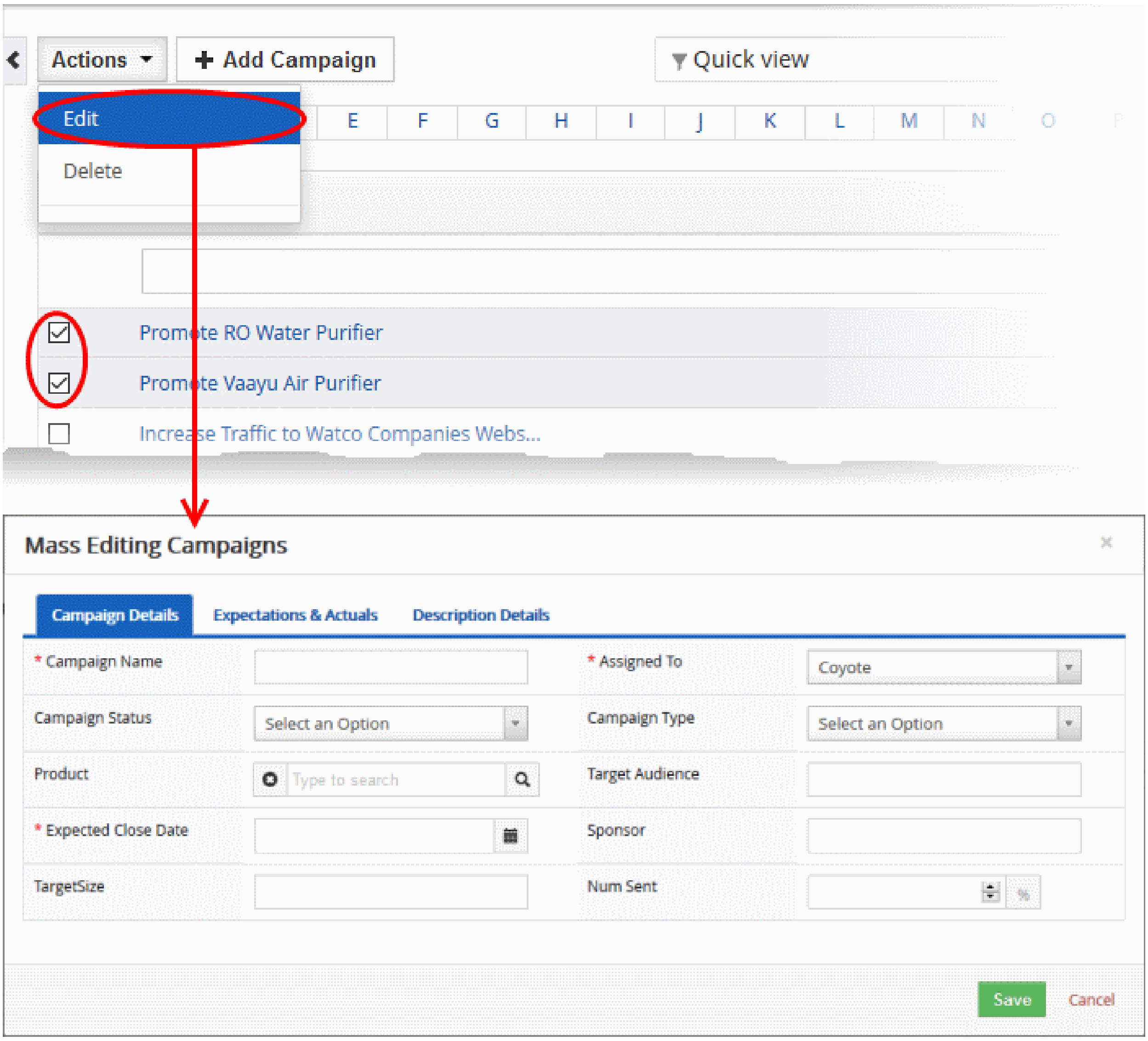
- **Edit campaign records**
- **Delete campaign records**

You can also remove several campaign records at once from the 'Campaigns List' interface.

To edit common details of several campaigns

- Click 'All' > 'Campaigns' (under 'Marketing and Sales') to open the 'Campaign List' interface
- Select the campaigns to be edited
- Click 'Actions' and choose 'Edit'

The 'Mass Editing Campaigns' pop-up will appear

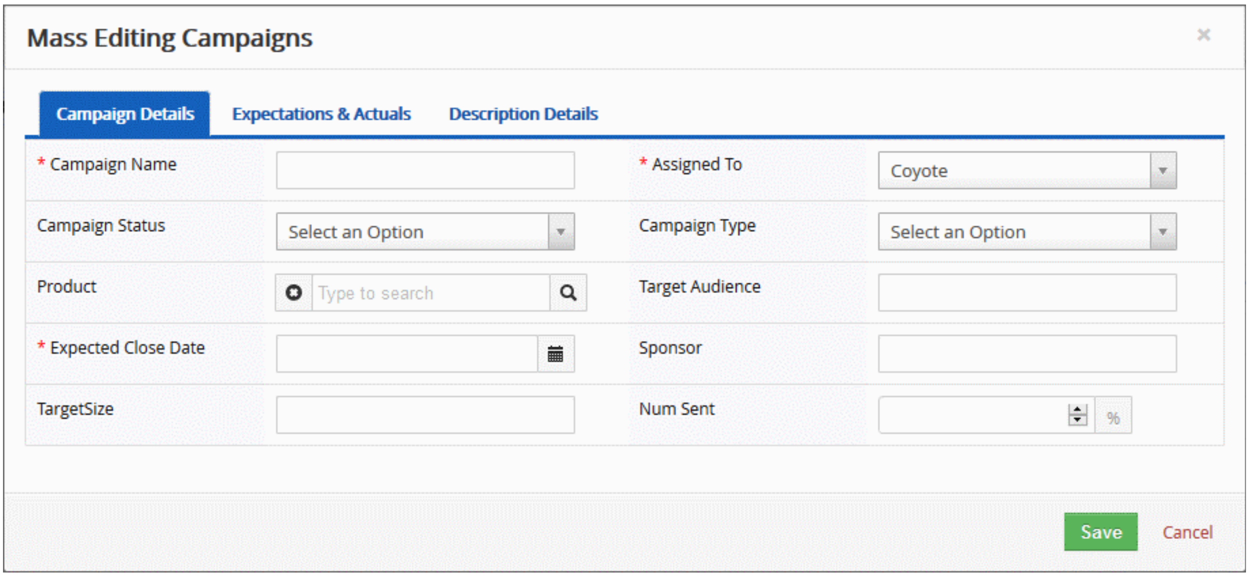


It contains three tabs:

- **Campaign Details**
- **Expectation & Actuals**
- **Description Details**

Campaign Details

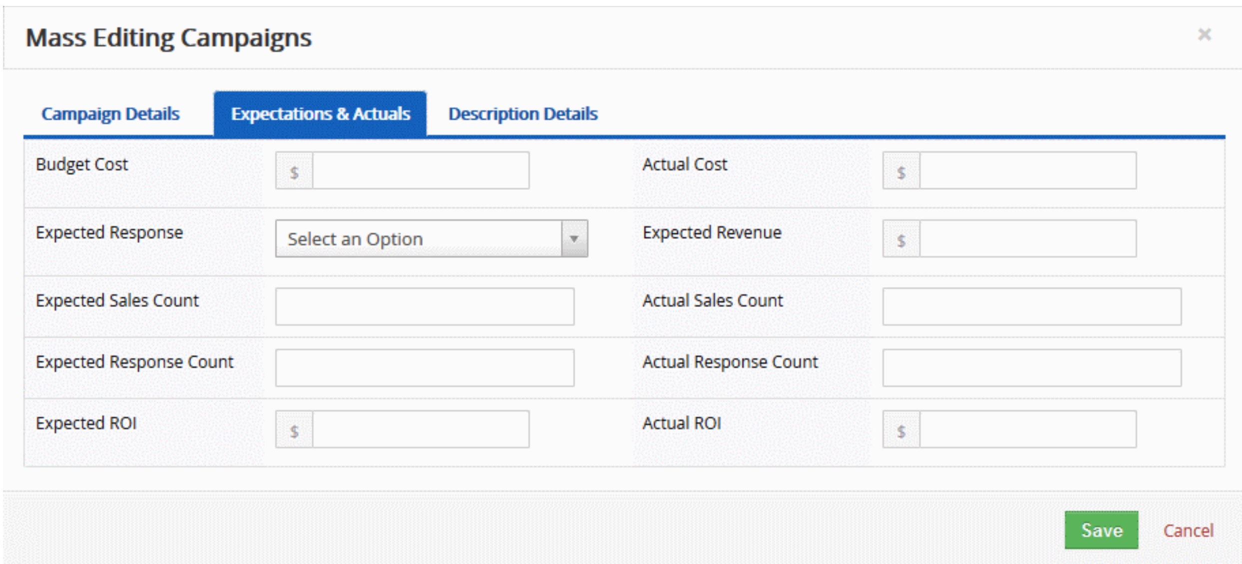
The 'Campaign Details' tab allows you to enter new values for campaign name, campaign status, assignee and more.



- Enter the new values for the parameters. See **this table** for descriptions of the fields in the 'Campaign Details' tab
- Click 'Save'.

Expectations & Actuals

The 'Expectations & Actuals' tab allows you to dynamically update expected and actual budget and actual costs incurred, revenue, sales and more.

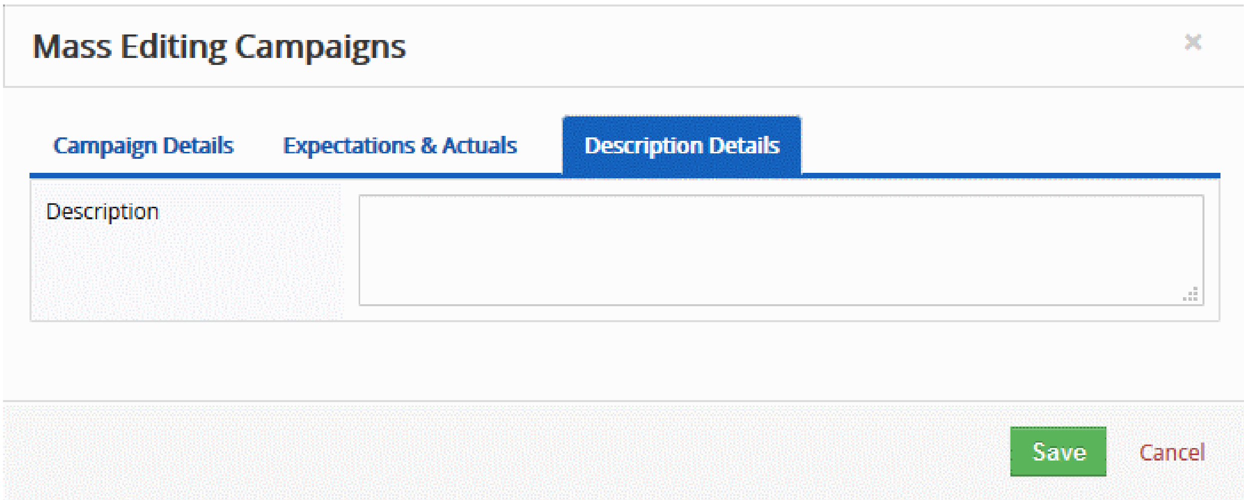


- Enter the new values for the parameters. See **this table** for descriptions of the fields in the 'Expectations and Actuals' tab

- Click 'Save'.

Description Details

The 'Description Details' tab allows you to enter a common description for the selected campaign records.



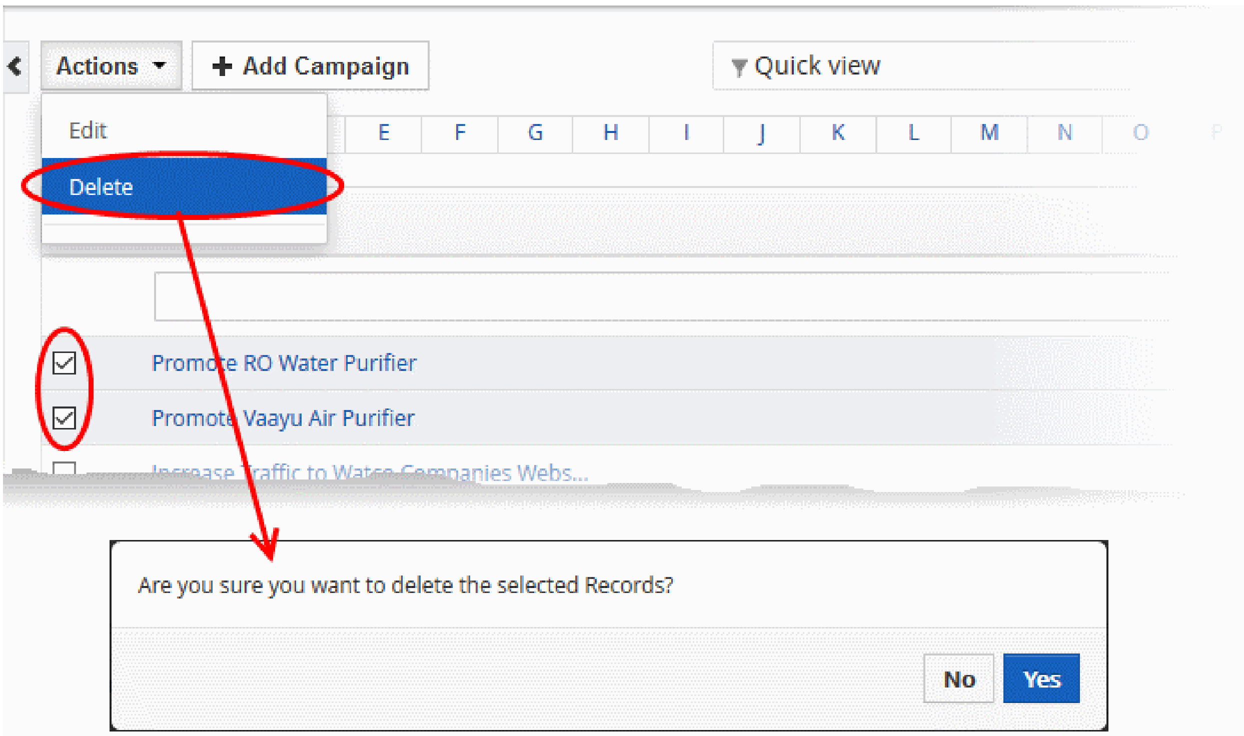
- Enter the new description and click 'Save'

Delete Campaign Records

The records for the campaigns that are completed/discontinued or the records that are not required anymore, can be removed from CRM.

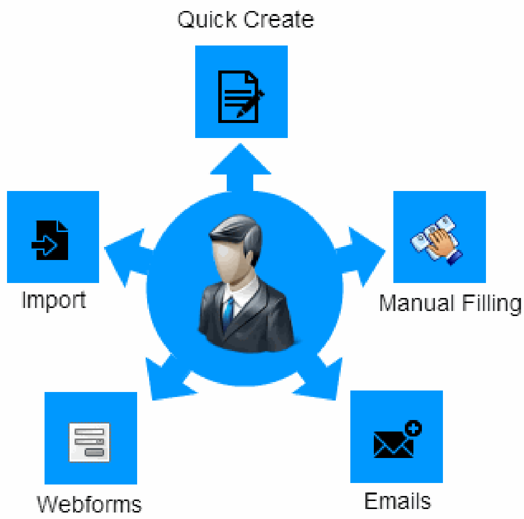
To remove campaign records

- Click 'All' > 'Campaigns' (under 'Marketing and Sales') to open the 'Campaign List' interface
- Select the campaign(s) to be edited
- Click 'Actions' and choose 'Delete'



- Click 'Yes' in the confirmation dialog to remove the record(s)

3.2. Leads



A 'Lead' is a potential customer or prospect. Generating a lead is the first step of the sales process in CRM. Lead records are designed to store all known information on lead, including company name, address, contact details and the lead's current position in the sales funnel.

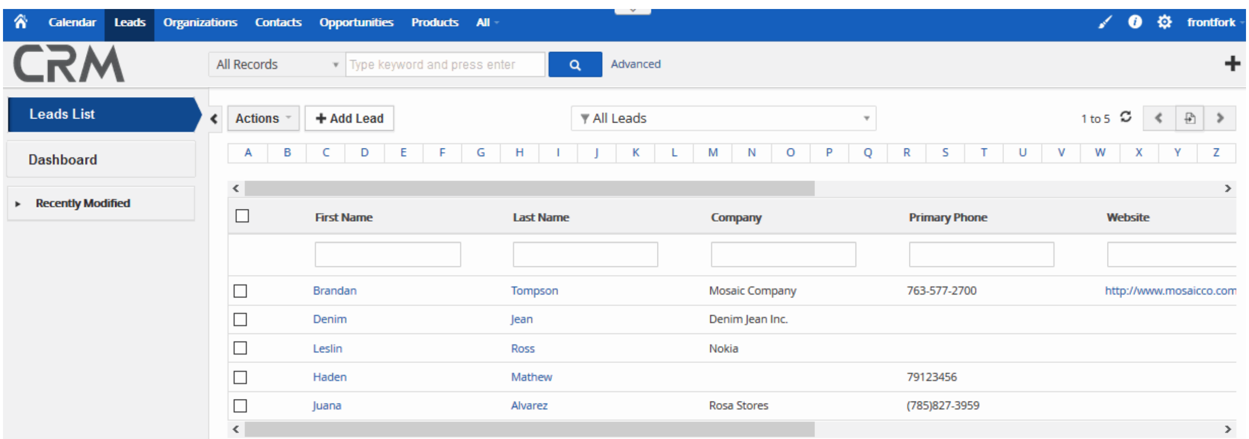
- Every unqualified contact/account should become a lead.
- The 'Leads' area lets you create new leads and associate them with contacts, emails, campaigns and services.
- You can add events and reminders to each lead and update lead information at any time.
- Once a lead is generated, the CRM can automatically assign it to a sales person based on lead assignment rules.

To open the leads interface:

- Click 'All' on the title bar and choose 'Lead' under 'Marketing and Sales'

OR

- Click 'Leads' on the title bar



By default, all leads will be displayed with the following details.

Lead List - Column Descriptions	
Column Header	**Description**
First Name	First name of the lead contact.
Last Name	Last name of the lead contact.
Company	The name of the business.
Primary Phone	The main contact number for the lead
Website	The URL of the company's website.
Primary Email	The contact email address of the lead.
Assigned to	Staff member to whom the campaign is assigned.

- Click any column header to sort the table according to the items in the column.
- To search for a specific item, enter the search criteria in the respective column header(s) and click 'Search' at the right end of the column header.
- For more details on Advanced filter options, see the section **Custom Views**.

Custom Filter View

- The 'Lead List' interface allows you to create custom views. For example, you may want to view only those leads assigned to you, and only view selected columns like first name, last name type or assigned to.
- You can create any number of views, and can make any view your default. See **Custom Views** for more details.

The following sections explain more about:

- **Create new Leads**
- **Import and Export Leads**
- **Track Leads**
- **Associate Other Records with a Leads**
- **Mass Management of Leads**

3.2.1. Create New Leads

The 'Leads' module allows you to create records which store all relevant information about a potential customer. You can associate lead records with CRM products, campaigns and services. You can add events and reminders to each lead and update lead activities and comments to track your progress.

- Click 'All' on the title bar and choose 'Leads' under 'Marketing and Sales' to open the 'Leads' interface.

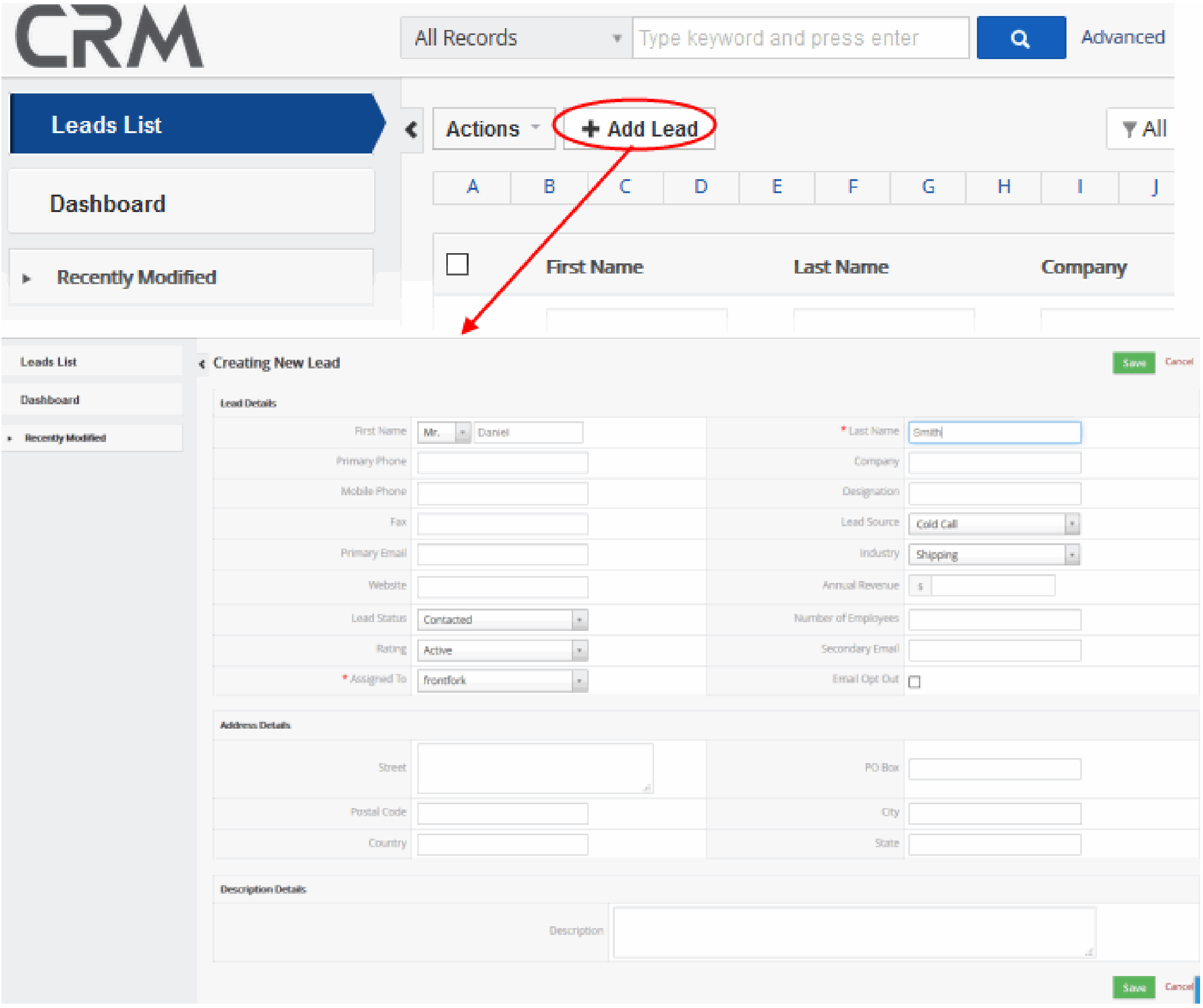
You can create lead records in four ways:

- **Manual create a new lead record** - Setup a new campaign record and specify all details. See **Add lead** for details.
- **Quick create a lead record** - Create a new lead record with only the details you require. Other details can be added later as the lead progresses. See **Quick Create a Lead Record** for details.
- **Clone a lead record** - Duplicate an existing record and use it as a starting point to create a new record. See **Clone a lead record** for details.
- **Import Leads** - Prepare a list of leads in a .csv or .vcf file and import data into leads. See **Import and Export Records** for details.

Create a New Lead Record

- Click 'All' on the title bar and choose 'Lead' under 'Marketing and Sales' to open the 'Lead List' interface
- Click the 'Add Lead' button

The 'Create New Lead' interface will open. Complete all mandatory fields to register the lead. Complete other fields with as much information as is available to you:



Create New Lead - Form Parameters	
Form Parameter	**Description**
Lead Details	
First Name	Enter the first name of the contact person
Last Name	Enter the last name of the contact person
Primary phone	Enter the main contact number for the lead
Company	Enter the name of the company
Mobile Phone	Enter a mobile phone number of the lead
Designation	Enter the contact persons title.
Fax	Enter the Fax number of the organization

Lead Source	Enter the source from which the lead was generated
Primary Email	Enter the mail email address of the lead
Industry	Enter the type of vertical that the lead belongs to
Website	Enter the URL of the leads website
Annual Revenue	Enter the annual revenue of the company
Lead Status	Enter the current status of the lead in the sales funnel
Number of Employees	Enter the number of employees working at the company
Rating	Enter the a rating for the company
Secondary Email	Enter any secondary email address for the lead
Assigned To	Enter the name of the staff member to whom the lead is assigned
Email Opt Out	Specify whether the lead has opted out of email communications.
Address Details	
Street	Enter the name of the street
PO Box	Enter the PO Box number
Postal Code	Enter the area's postal code
City	Enter the name of the city
Country	Enter the name of the country
State	Enter the name of the state.
Description Details	
Description	Enter a description for the lead.

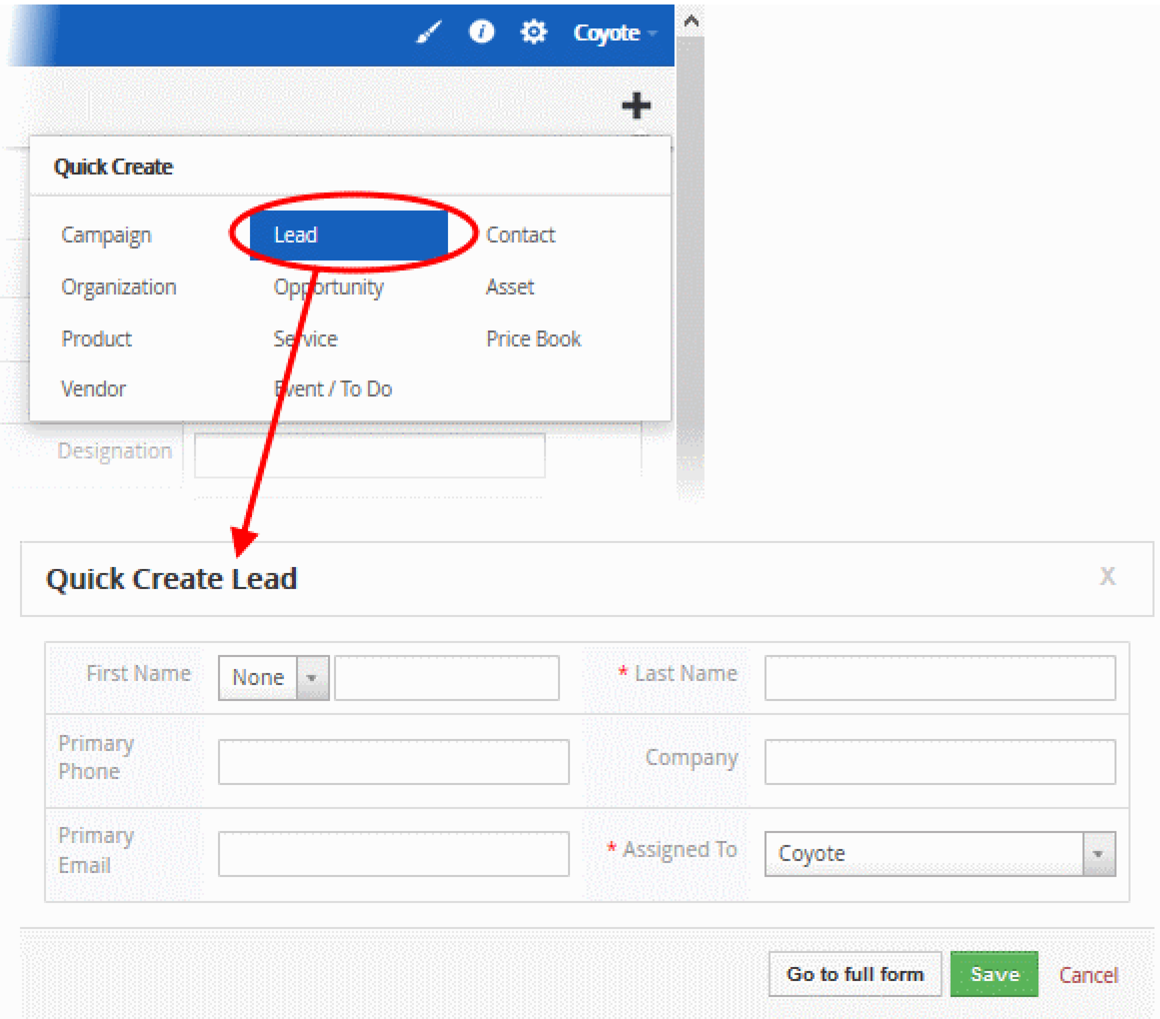
- Fill up the form with the details of the lead and click 'Save'

The lead record will be saved and added to the list of campaign records in the 'Lead List' interface.

Quick Create a Record

The 'Quick Create' option allows you to create a lead record from any interface, within a short time. It requires you to enter only the basic details.

- Click the '+' button at the top right from any interface of CRM and choose 'Lead' from the options.



- Fill-in the leads details in the Quick Create Lead dialog. Descriptions of the form parameters are available in the **table above**.
- If you want to view and enter all details, click 'Go to the full form'
- Click 'Save'

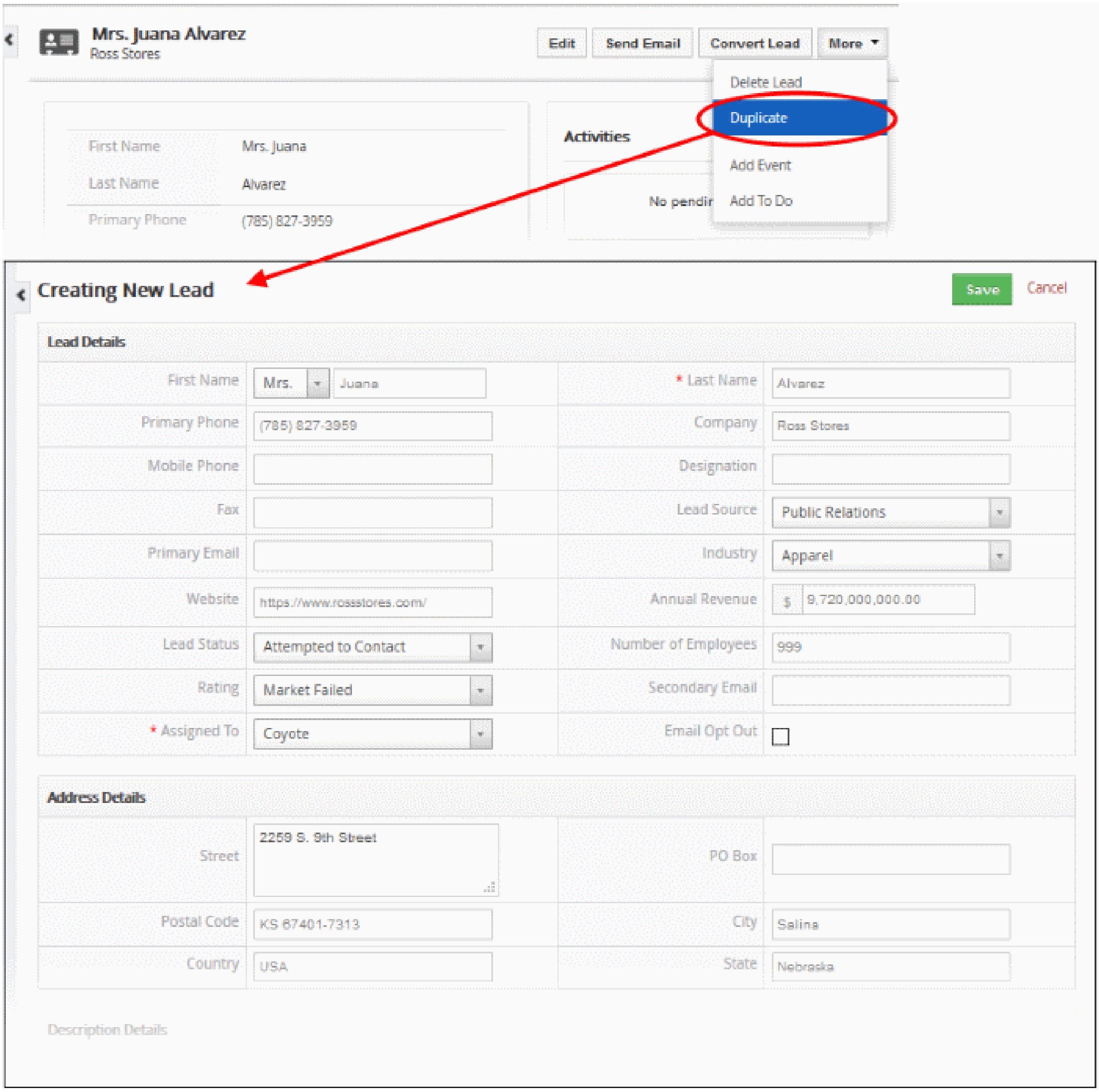
The record will be saved and added to the list of lead records in the 'Leads List' interface. You can open the details interface for the record by clicking the person's name and add/edit the details as required at anytime.

Clone a Lead Record

CRM allows you to create a new lead record using an existing record as a template. You can then edit the cloned record according to the requirements of your new campaign. This is useful when you are creating a lead record for a product/service for which a lead exists already or for a new type of person/customer organization.

To clone a lead record

- Click 'All' on the title bar and choose 'Leads' under 'Marketing and Sales' to open the 'Leads List' interface
- Click on the name of the lead record you want to clone to open the the 'Lead Details' interface
- Click 'More' on the top right and choose 'Duplicate'



The 'Creating New Lead' form will open with the details populated from the original record.

- Enter a details for the new lead
- Edit the details as required. Descriptions of the form parameters are available in the **table above**.
- Click 'Save'.

The lead record will be saved and added to the list of lead records in the 'Leads' interface.

3.2.2. Manage Leads

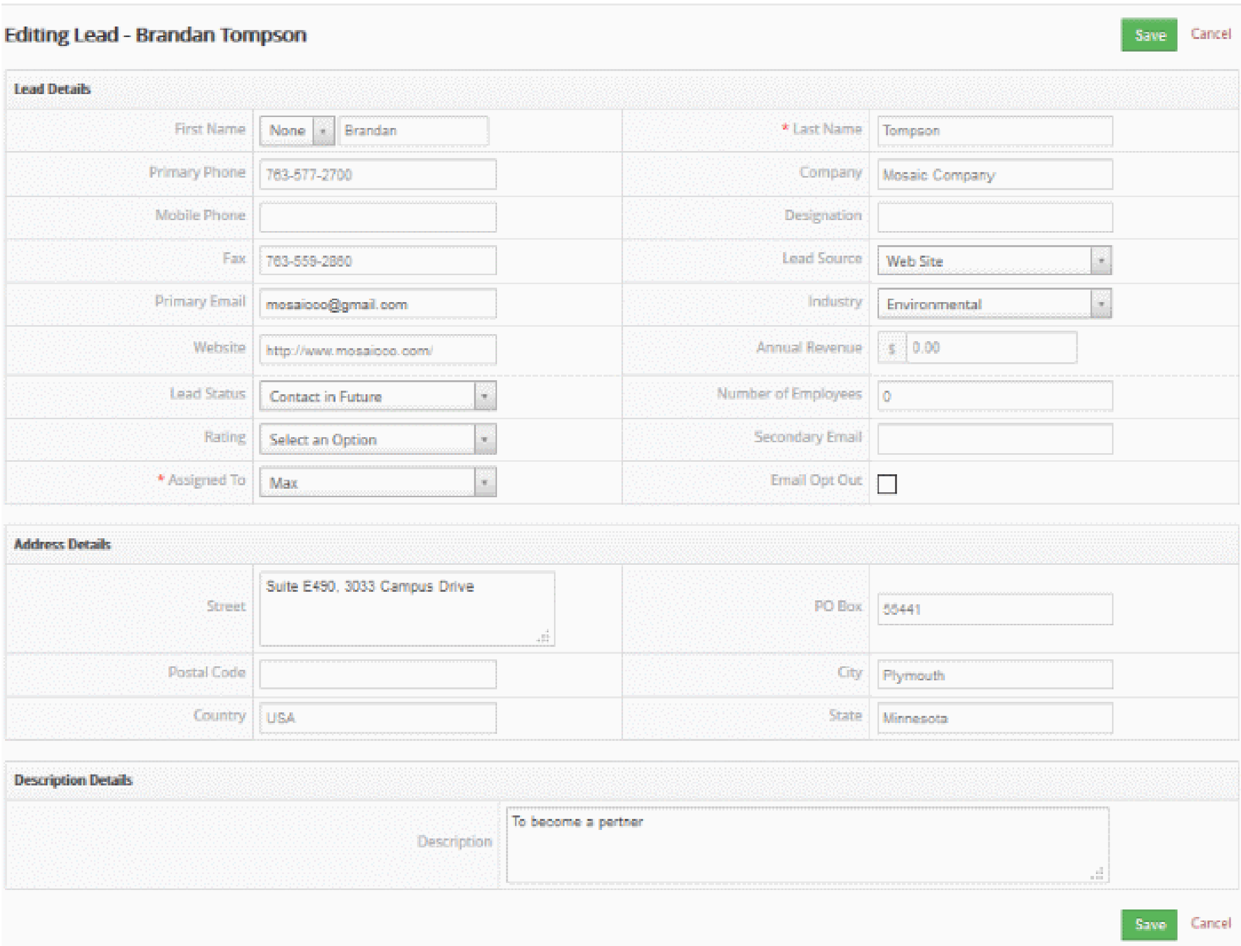
- The 'Lead List' interface lets you view and update lead details, including contact information, industry, assigned staff member and more.
- You can also schedule activities and events for the lead from this interface. The activities will be reflected in the calendars of team members assigned to the lead.
- You can associate email, product, campaign and services records to a lead from here.
- You can also send automated emails to the lead, and transfer lead ownership.

To view lead details:

- Click 'All' > 'Leads' to open the 'Lead List' interface
- Click on a lead to open the lead summary interface
- To see even more information, click 'Lead Details' on the right-hand menu

To edit a lead:

- Click 'All' > 'lead' to open the 'Lead List' interface
- Click on a lead's first name and then the 'Edit' button at the top right of the 'Lead Summary' interface. OR
- Click 'All' > 'Lead' to open the 'Lead List' interface
- Place your mouse cursor over the name of a lead to reveal the action buttons on the right of the row.
- Click the 'pencil' icon to open the lead edit interface:



- See **this table** for descriptions of the fields in the 'Lead Details' interface

- Administrators can edit a lead to update it with the latest campaign progress

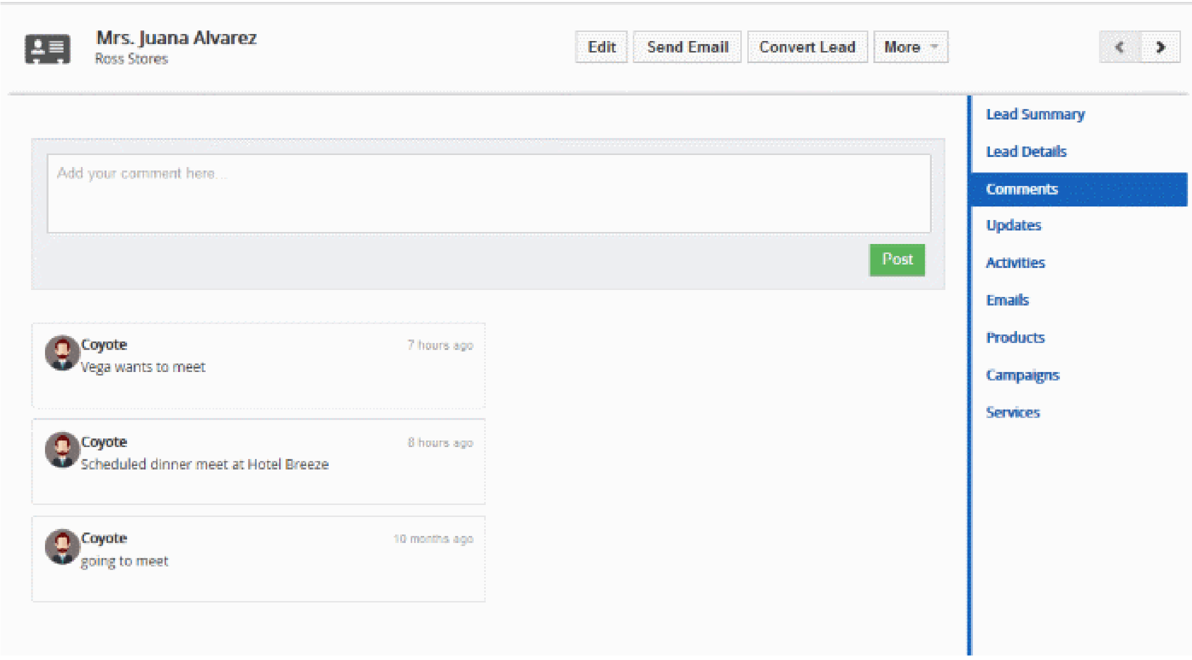
Comments

The comments part of the lead record allows staff to post internal memos about the lead.

To view a comment in a record:

- Click 'All' > 'Leads' (under 'Marketing and Sales') to open the 'Leads List' interface
- Choose a lead record and enter your comments and click 'Save'.

  OR
- Click 'Comments' in the 'Leads Summary' interface.
- Enter your comments and click 'Save'.



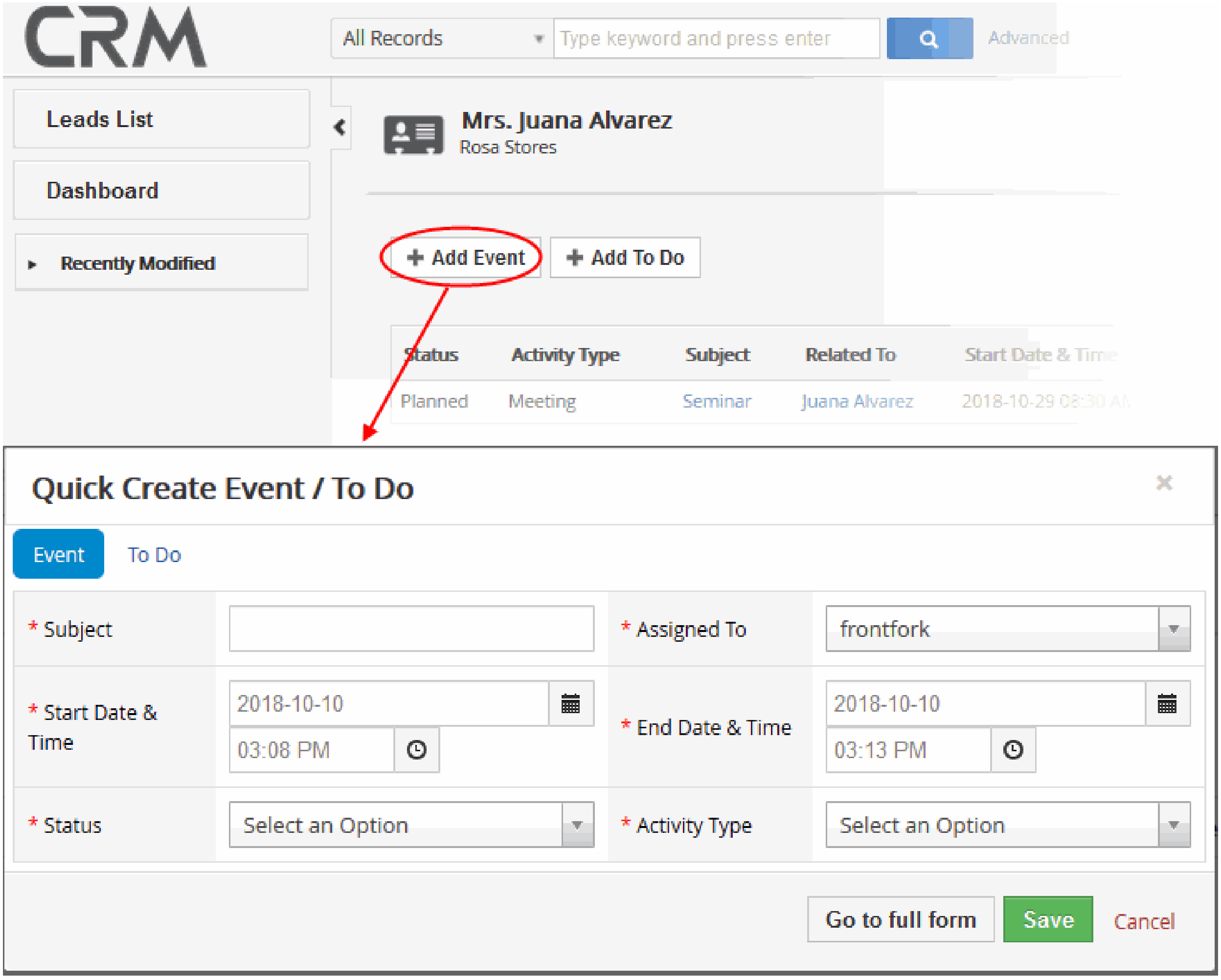
Activities

Activities consist of 'Events' (meetings, calls, webinars etc) and 'To Dos' (product delivery, purchase etc). Administrators can add 'Activities' to a lead and these will be added to the CRM calendar. Activities can be viewed by administrators and staff members to whom the lead is assigned. Assigned staff and administrators can add an 'Event' or 'To Do' as an activity of a lead record.

To create an Event/To Do:

- Click 'All' > 'Leads' (under 'Marketing and Sales') to open the 'Leads List' interface
- Choose a lead then click 'Activities' from the menu on the right
- Click 'Add Event' or 'To Do' in the activities interface.

  OR
- Click 'More' on the top right of any of the lead interfaces from the right pane.
- Choose 'Add Event' or 'To Do' in the drop down menu.



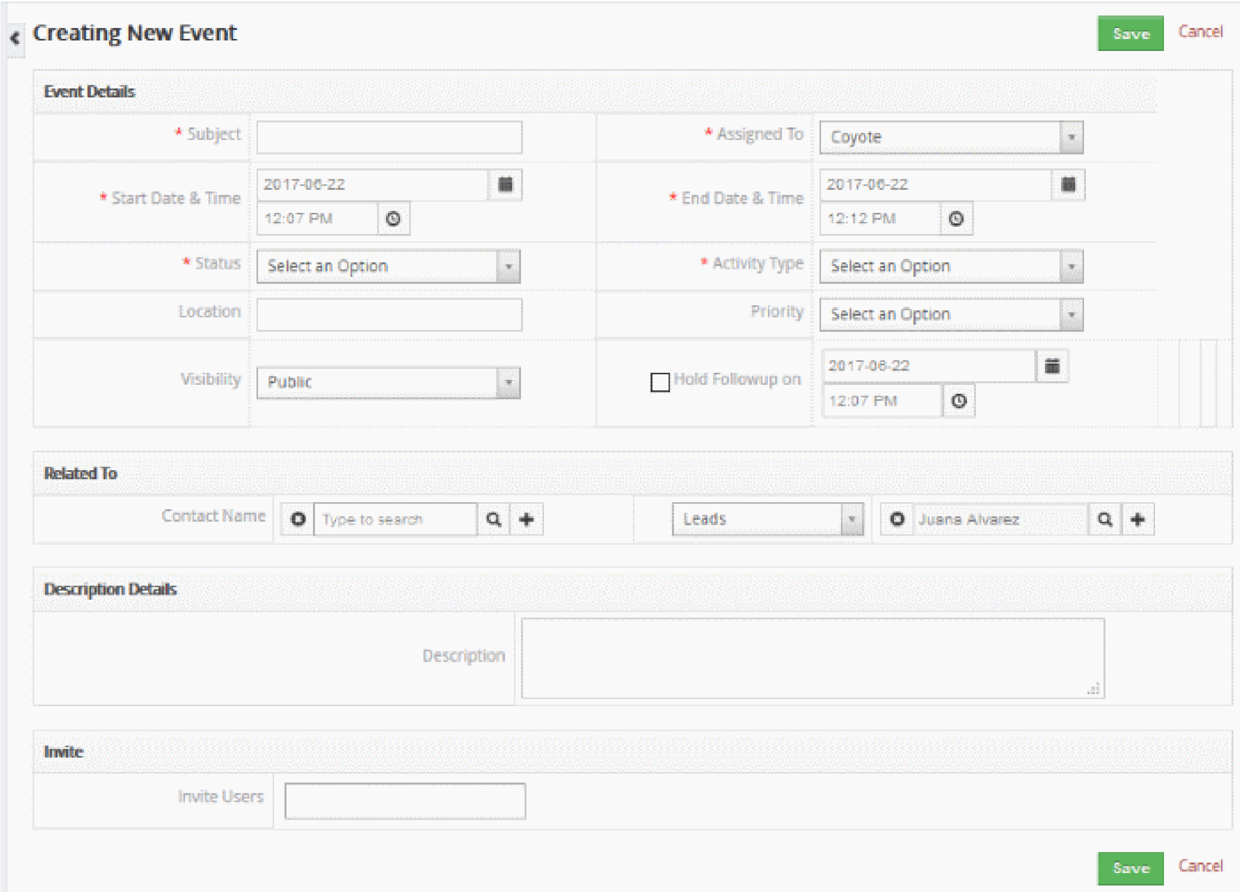
The event / to-do dialog will open:

- Complete your event details and click 'Save'.

Please note that the 'Activity Type' option is only available for quick events.

The information in the quick event dialog is basic in nature and will be used to populate the calendar entry. Use the 'full form' if you want to create a detailed event with more information (priority, visibility etc).

- To create a detailed event, click the 'Go to full form' button in the quick event dialog:



- Enter the required details and click 'Save'.

See the section **Manage Shared Calendar** for more details on the 'Event/To Do' full form.

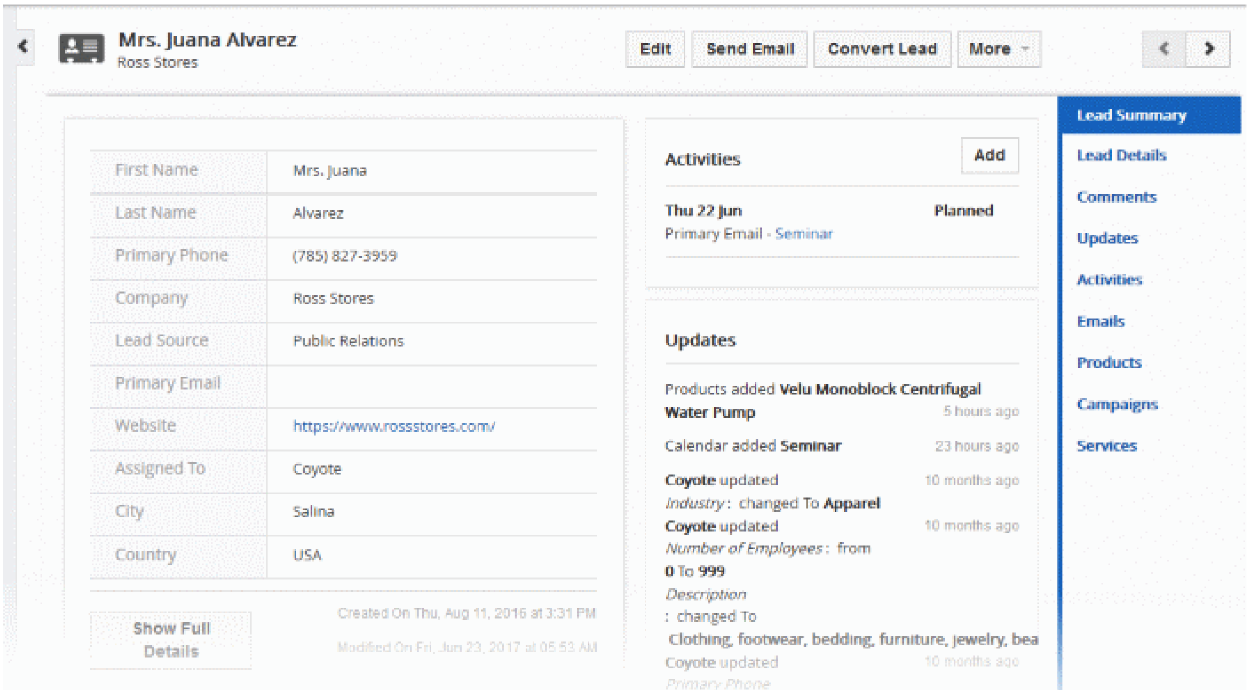
3.2.3. Associate Other Records with a Lead

The 'Lead Summary' interface lets you associate records from various CRM modules (contacts, leads, opportunities, customer organizations) with a lead record. Administrators can view and manage these records and can initiate lead emails to the prospects. A lead can be converted into a opportunity, contact or organization based on the information received.

To view and manage the records of modules associated with a lead record

- Click 'All' > 'Lead' to open the 'Leads List' interface
- Click on any lead to open the 'Lead's Summary' page
- Click the 'Lead Details' link on the right to see even more information

The right-hand menu contains links to the records of other modules which are associated with the lead:

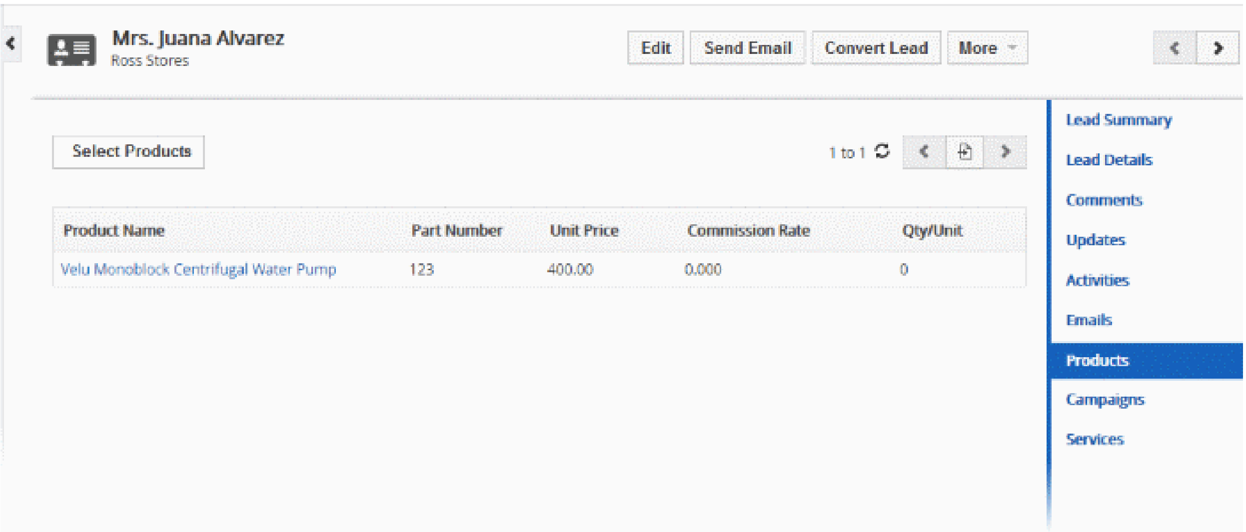


Click these links to create records in other modules which will be linked to the lead.

- Activities - View and edit existing activities associated with the lead. Add new events and 'To-Do's.
- Emails - View, create and send emails to the lead
- Products - Select existing products associated with the lead. Associate the product to the lead
- Campaigns - Select existing campaigns associated with the lead. Associate the campaigns to the lead
- Services - Select existing services associated with the lead. Associate the services to the lead

The example below describes how to manage the 'Product' records associated with a lead.

- Open a lead as described earlier then click 'Products' in the menu on the right
- This will open a list of products (product records) that are already associated with the lead



From here you can:

- **Associate new product records to the lead**
- **Manage selected product**

- **Lead Conversion**

CRM also allows you to send emails to selected persons from any lead record. See **Emails** to know more details about sending emails.

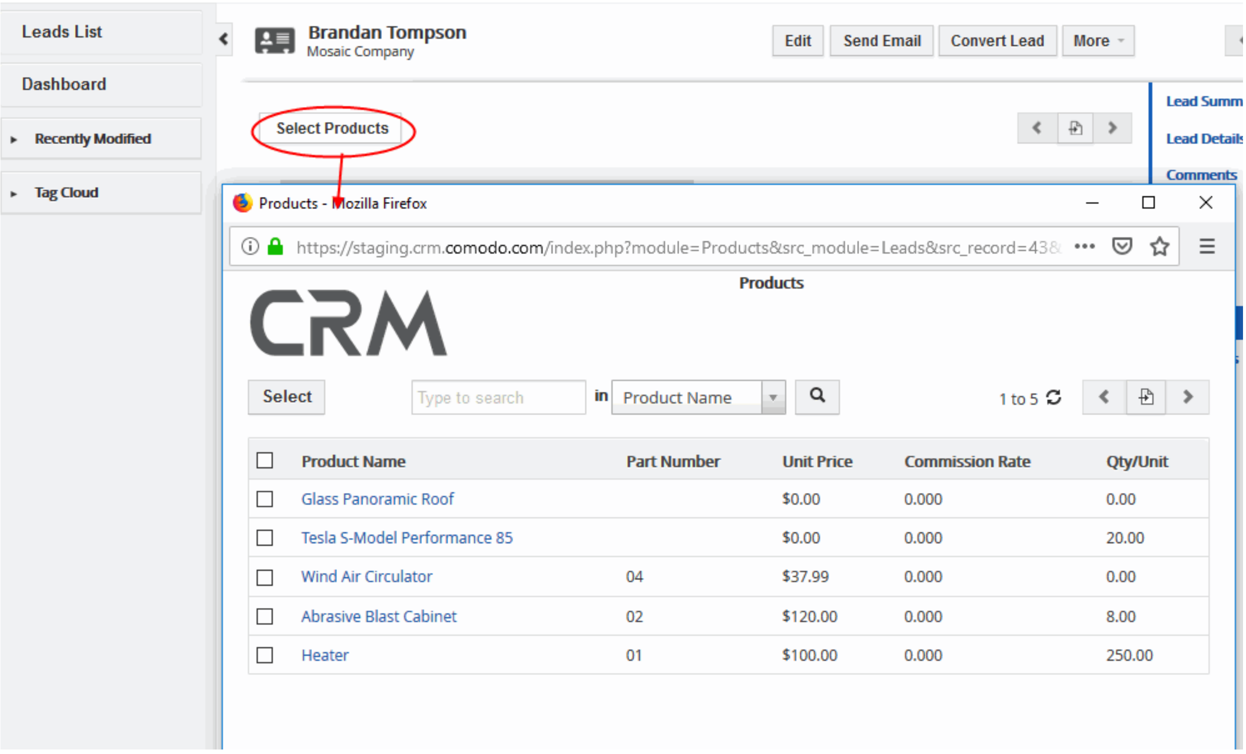
Associate Product Records to the Lead

You can associate contacts to the lead in two ways:

- **Manually select products from records existing in CRM**
- **Add a new product and associate with the lead**

To manually associate products records

- Click 'Select Products'



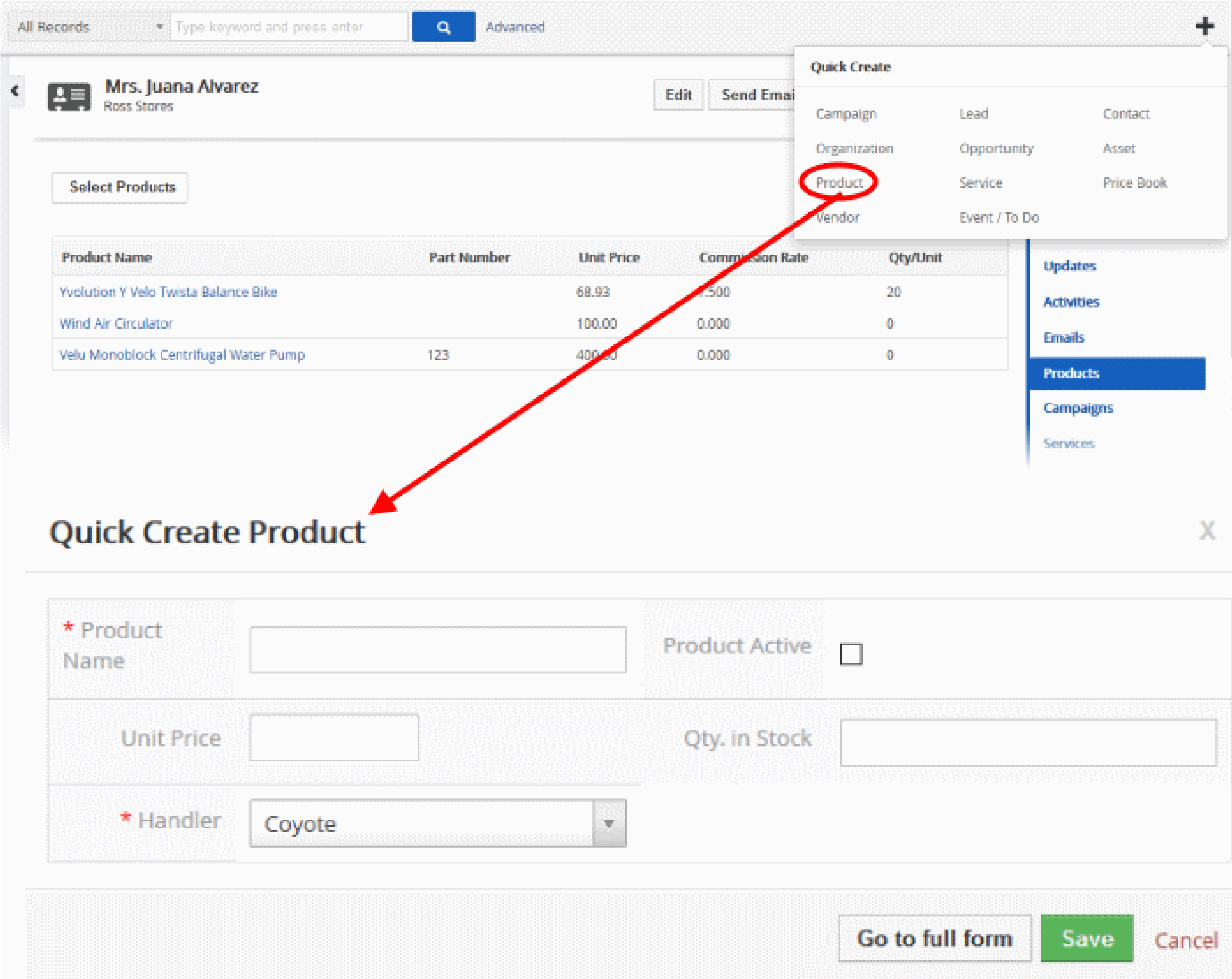
A list of available product records will be displayed.

- Select the product(s) you want to associate with the lead and click the 'Select' button (top left)

The product will be added to the list of associated records.

To Add a New Product

- Click the '+' symbol on the top right corner of the 'Product' interface.'
- Click 'Product' from the drop down.



The 'Quick Create Product' dialog will appear.

- Complete the details of the new product and click 'Save'.

The information in the 'Quick Create Product' dialog is basic in nature. Use the 'full form' if you want to enter more details for the contact.

To send lead emails

- Select the product from the list of associated products and click 'Send Email'
- Enter the 'To' email address, 'Subject' and compose the mail or select the email template required by clicking the 'Select Email Template' button
- Click 'Send'.

The leads selected will receive the email.

Manage Associated Product

You can view full details of a product, edit a contact or remove a product from the associated product list.

- Mouse over a product record to view the options at the far right end of the row

- View product details. See **Products** for more details.
- Edit product details. See **Products** for more details.
- Removes the product's association with the lead.

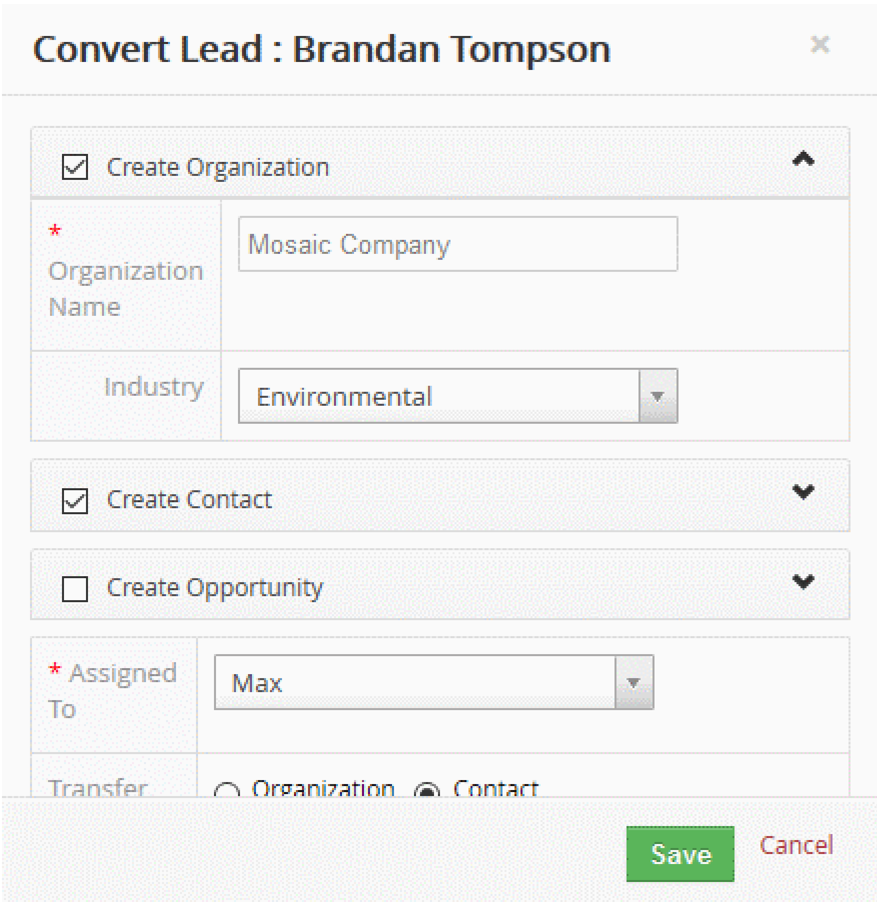
The information above also applies to the other record types listed in the right-hand menu.

Lead Conversion

A qualified lead can be converted to an opportunity. By converting a lead, you will simultaneously create a new contact record and organization record to store personal and company information.

To convert a lead:

- Click 'All' > 'Lead' to open the 'Leads List' interface
- Click on any lead to open the 'Lead's Summary' page
- Click the 'Convert Lead' button at the top-right corner of the 'Leads Summary' interface.



A 'Convert Lead' dialog will be displayed.

- Select your conversion options. You can create a new organization and/or contact from the lead and can also promote it to an opportunity.
- See '**Add a New Contact**', '**Add a New Organization**' and '**Create an Opportunity**' if you wish to know

more about these sections.

- Click 'Save'.

After the lead is converted, the lead record will be removed from the 'Leads List' interface.

3.2.4. Mass Management of Leads

CRM allows you to edit, delete, add comments and send emails for several lead records at once. This is useful when you are updating or altering details that are common to a set of lead records. For example, you may have several leads with different audiences, different close dates and different projected revenues, but would like to pass a common comment to staff assigned to those leads.

Tip: If you want to update the details of a ***single*** lead record:

- Open the 'Leads List', click the lead name then click the 'Edit'/ button.
- See **Tracking Leads** for more details.

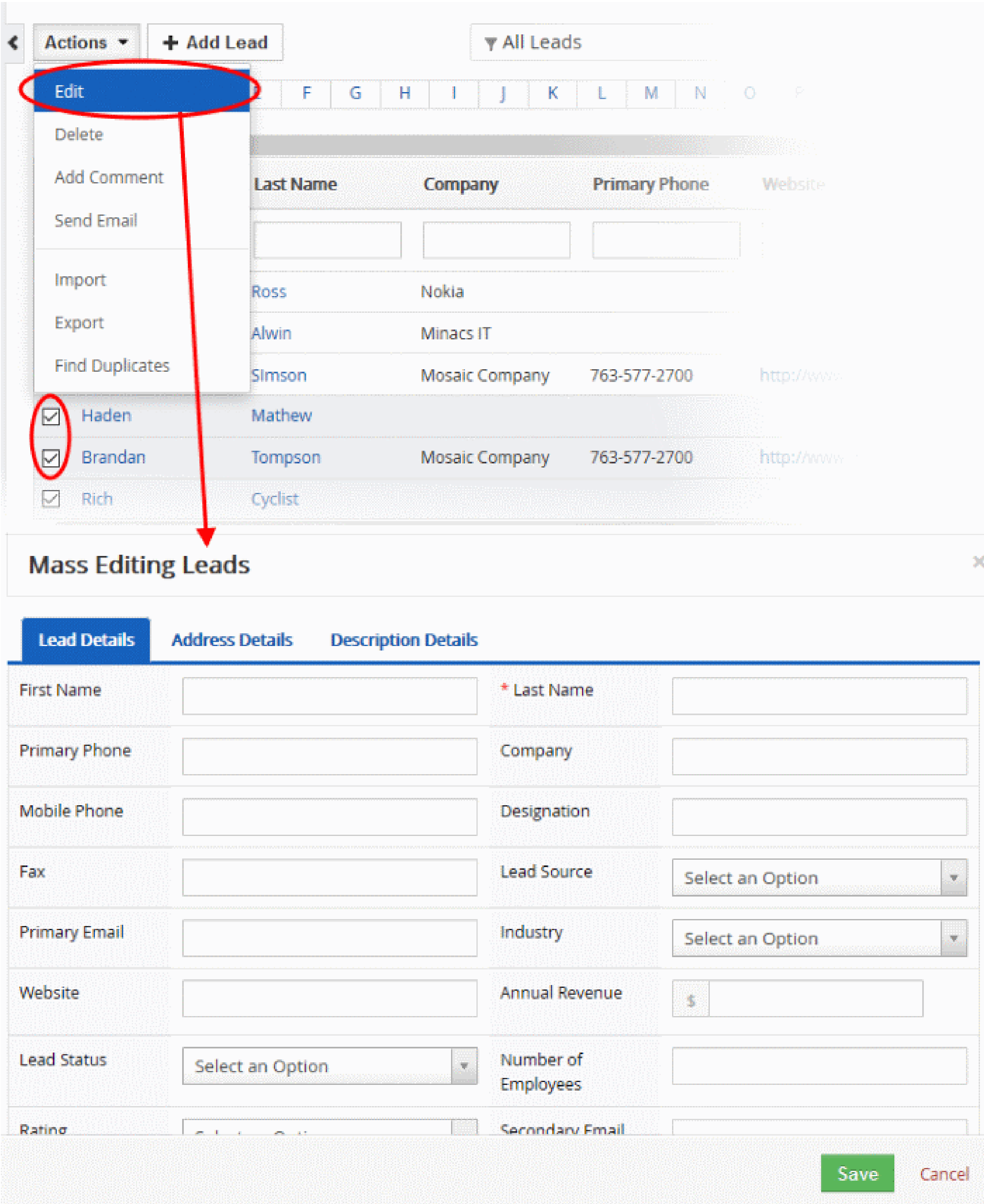
The interface allows you to:

- **Edit lead records**
- **Delete lead records**
- **Add comments to lead records**
- **Send Email from a lead record**
- **Importing and Exporting Lead records**
- **Find Duplicate lead Records**

To edit common details of several leads

- Click 'All' > 'Leads' (under 'Marketing and Sales') to open the 'Leads List' interface
- Select the leads to be edited
- Click 'Actions' and choose 'Edit'

The 'Mass Editing Leads' pop-up will appear

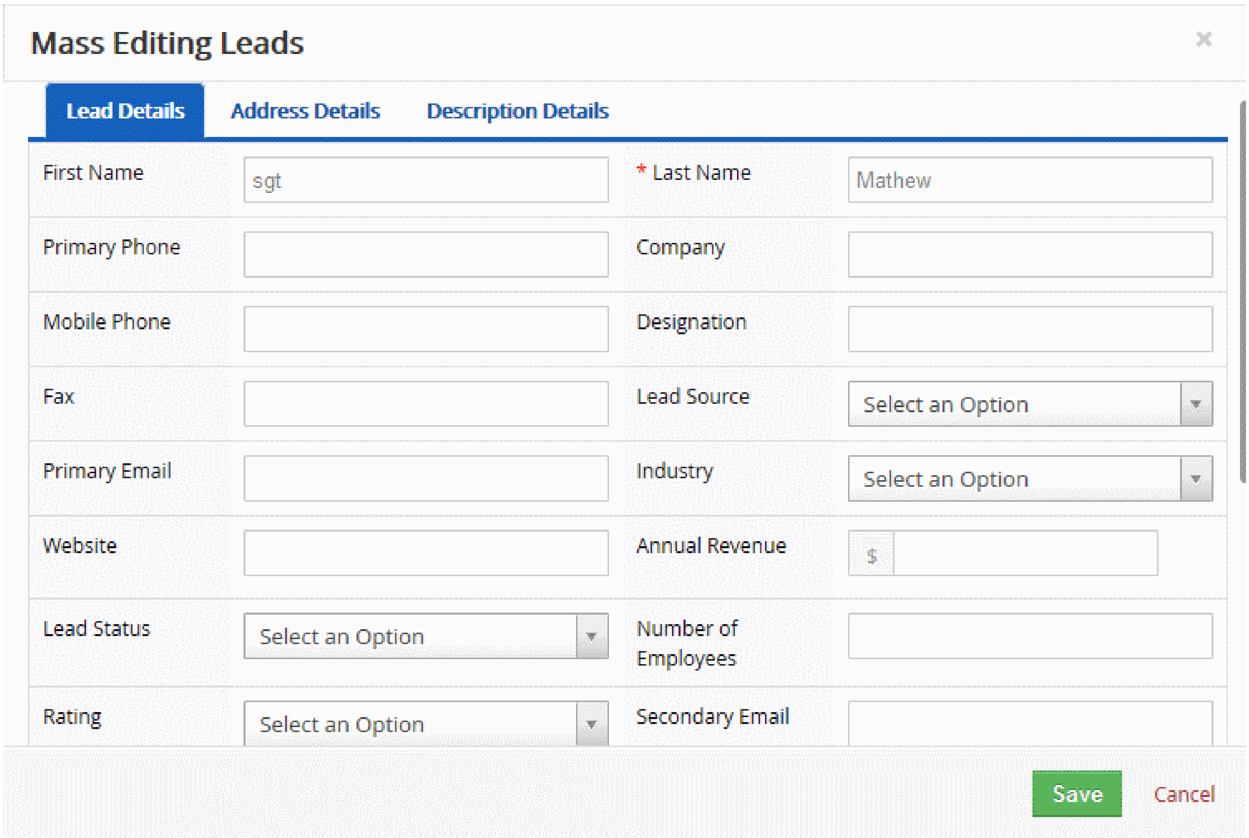


It contains three tabs:

- **Lead Details**
- **Address Details**
- **Description Details**

Lead Details

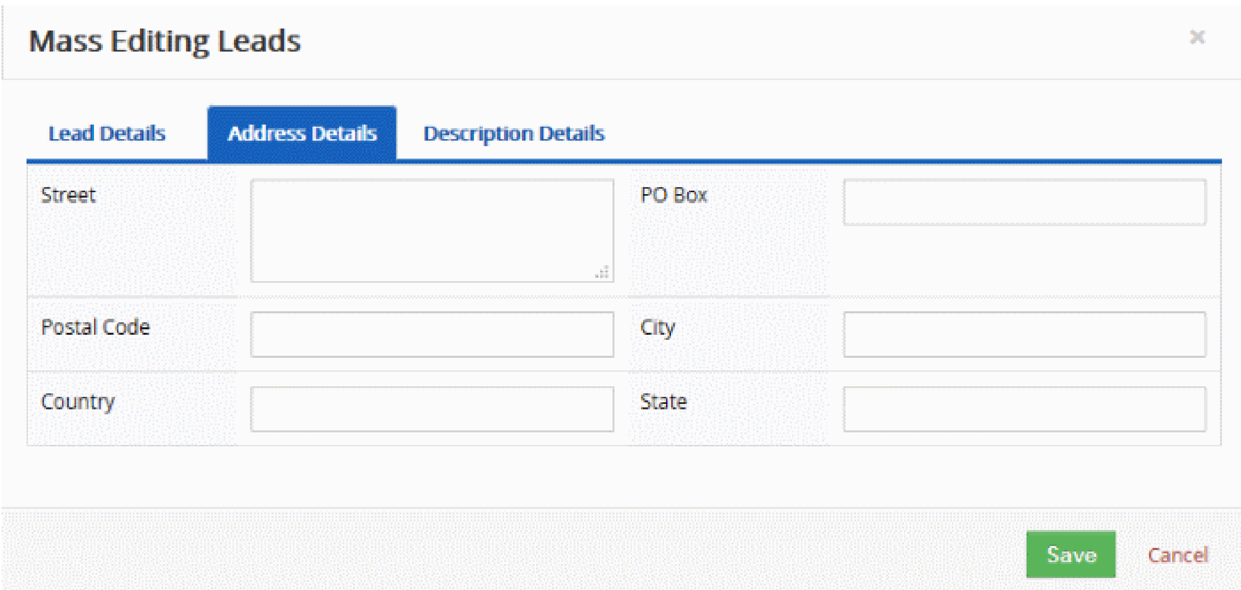
The 'Lead Details' tab allows you to enter new values for first name, last name, website and more.



- Enter the new values for the parameters. See **this table** for descriptions of the fields in the 'Lead Details' tab
- Click 'Save'.

Address Details

The 'Address Details' tab allows you to update city, state country details and more if the leads have these information in common.

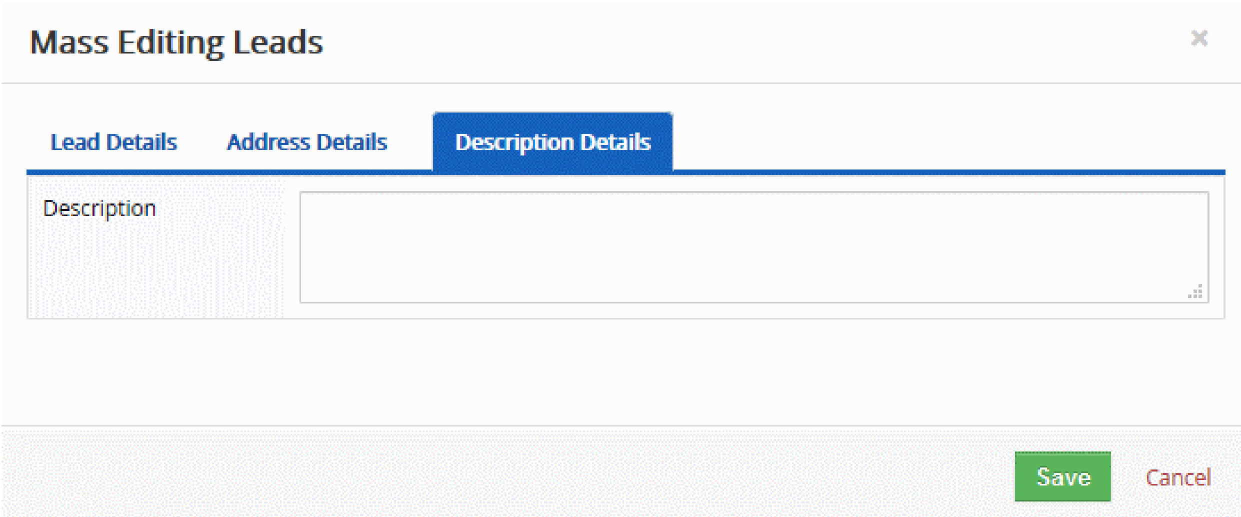


- Enter the new values for the parameters. See **this table** for descriptions of the fields in the 'Address Details' tab

- Click 'Save'.

Description Details

The 'Description Details' tab allows you to enter a common description for the selected lead records.



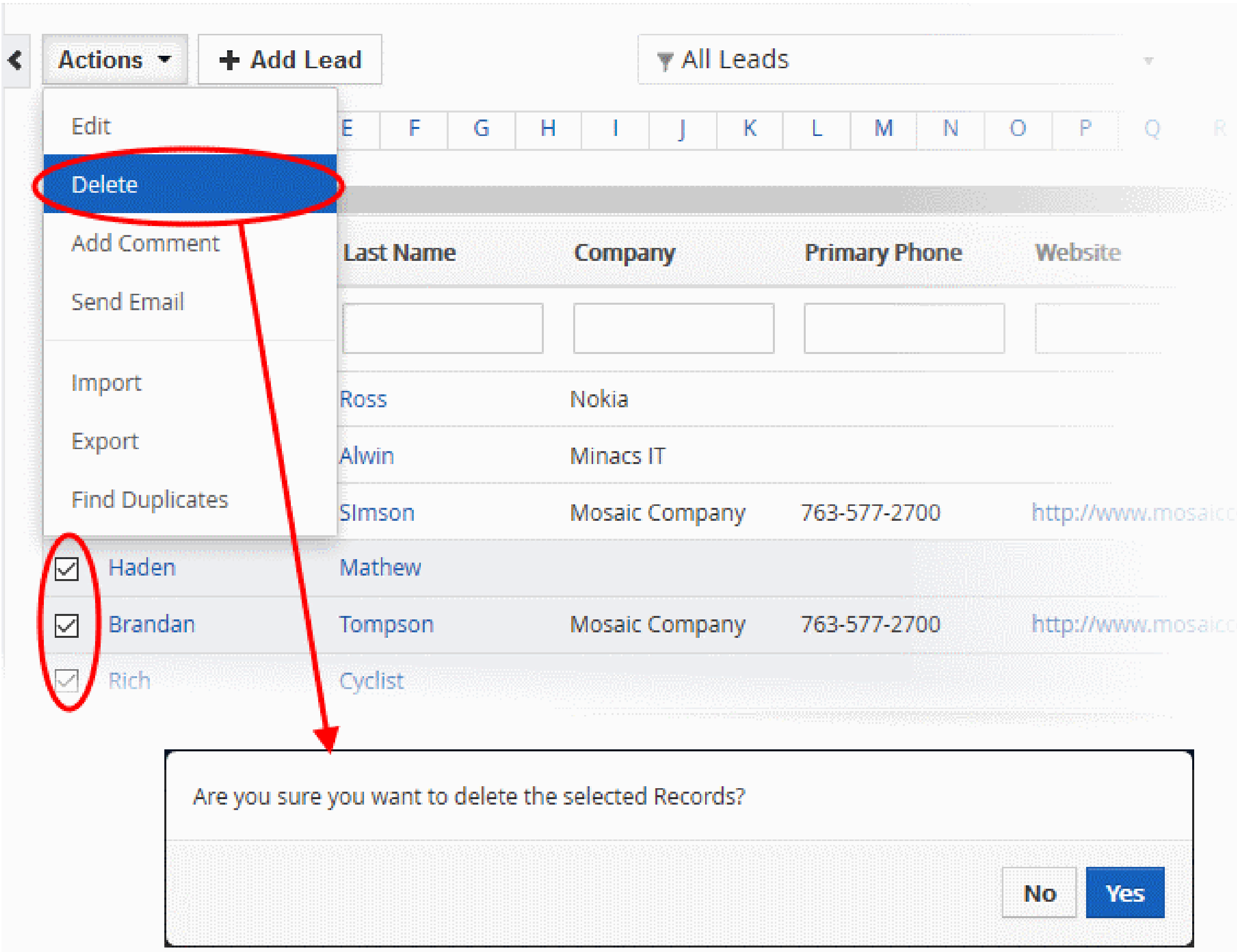
- Enter the new description and click 'Save'

Delete Lead Records

Records for the lead that are no longer required can be removed.

To remove lead records

- Click 'All' > 'Leads' (under 'Marketing and Sales') to open the 'Lead List' interface
- Select the Lead(s) to be deleted
- Click 'Actions' and choose 'Delete' button.



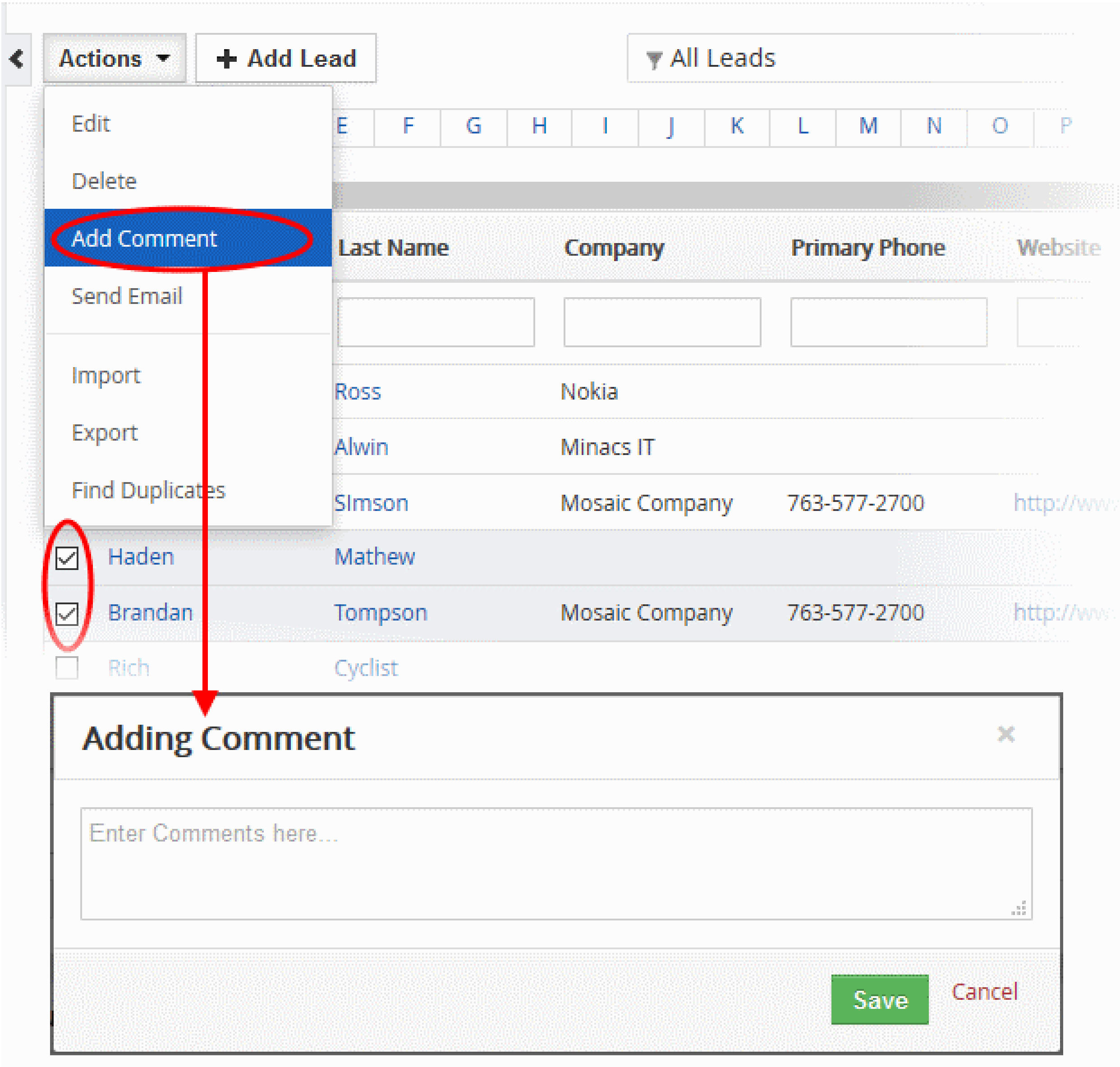
- Click 'Yes' in the confirmation dialog to remove the record(s)

Add Comments to Lead Records

You can leave a comment applies to all selected leads.

To do this:

- Click 'All' > 'Leads' (under 'Marketing and Sales') to open the 'Lead List' interface
- Select the Lead(s) to which you need to add comment.
- Click 'Add Comment' and enter the comments



- Click 'Save'

Send Email

You can send mails to multiple leads at once. See **Emails** to know how to send mails to several leads.

Import / Export Lead Records

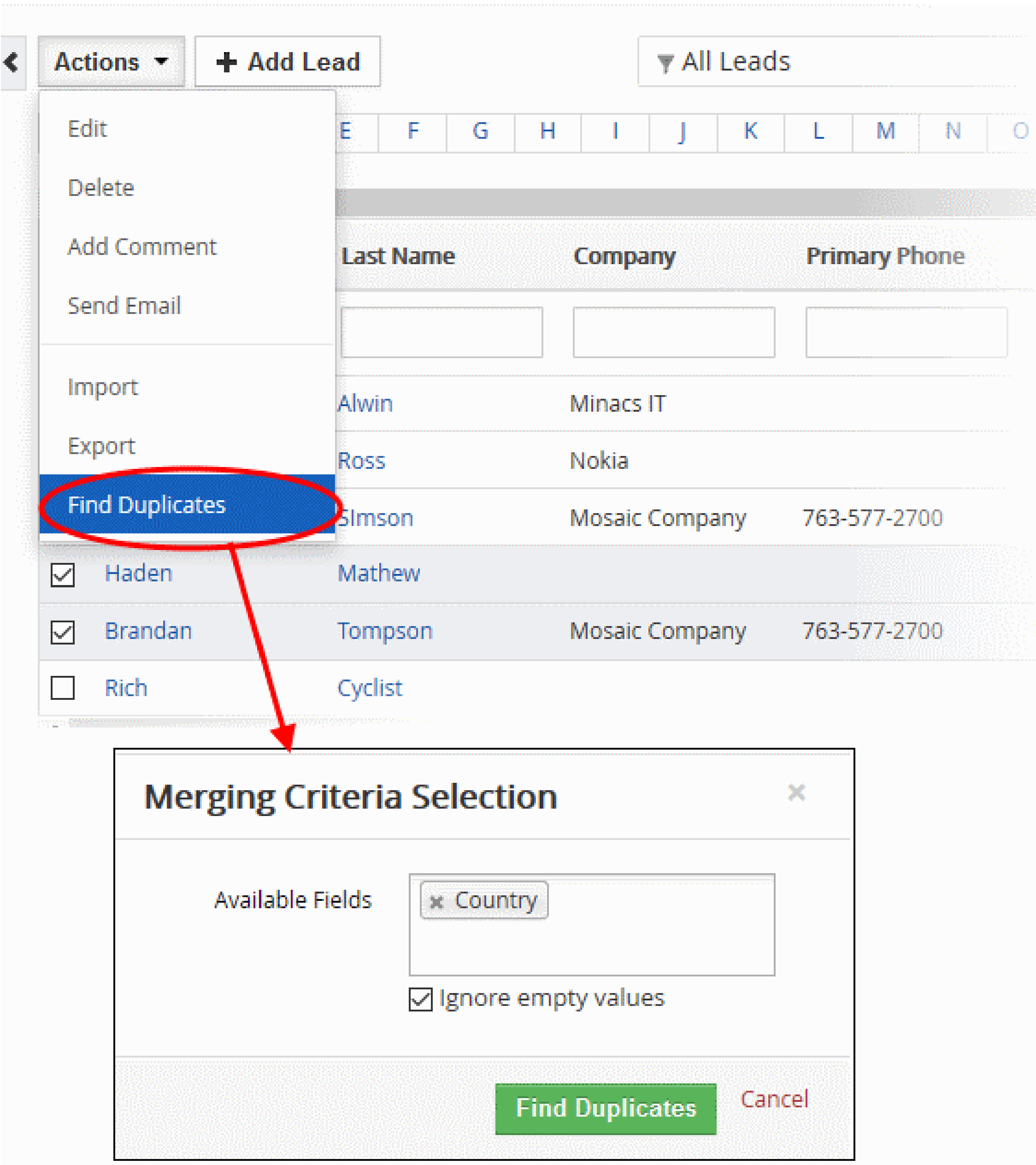
You can import saved records and export opportunities records from this interface. See '**Import and Export Records**' for more information.

Find Duplicates

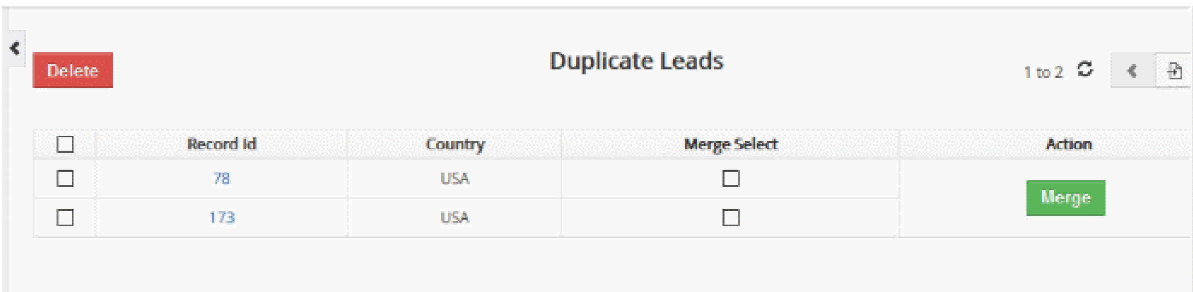
You can find duplicate records from multiple lead records at once.

To find duplicate lead records:

- Click 'All' > 'Leads' (under 'Marketing and Sales') to open the 'Leads List' interface
- Select the duplicate lead records to be identified
- Click 'Actions' and choose 'Find Duplicates'

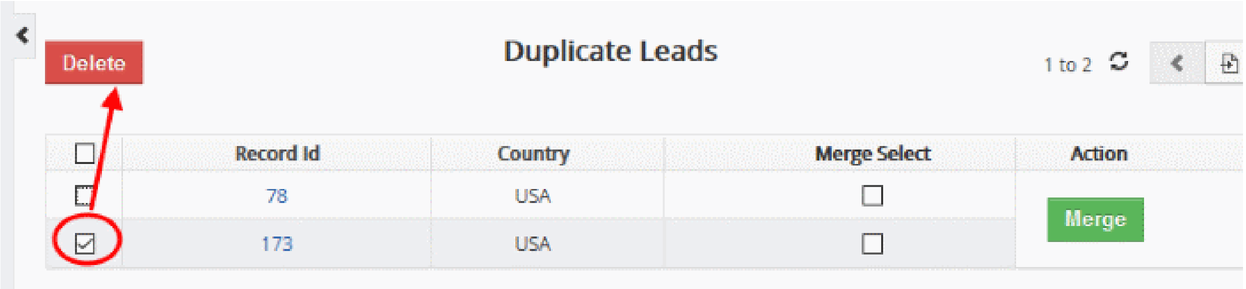


- Choose the lead related fields from the drop down and if you dot want the empty values, select the 'Ignore empty values' option.
- Click 'Find Duplicates'



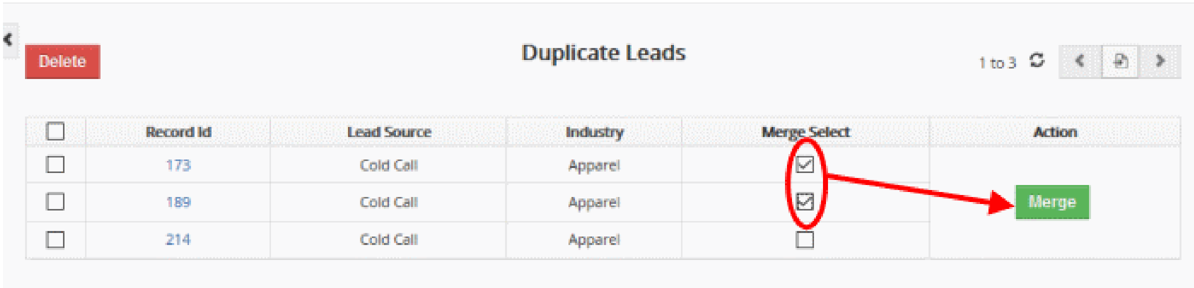
The 'Duplicate Leads' page is displayed.

- You can select the duplicate lead record and click the delete button on the top left of the 'Duplicate Leads' page

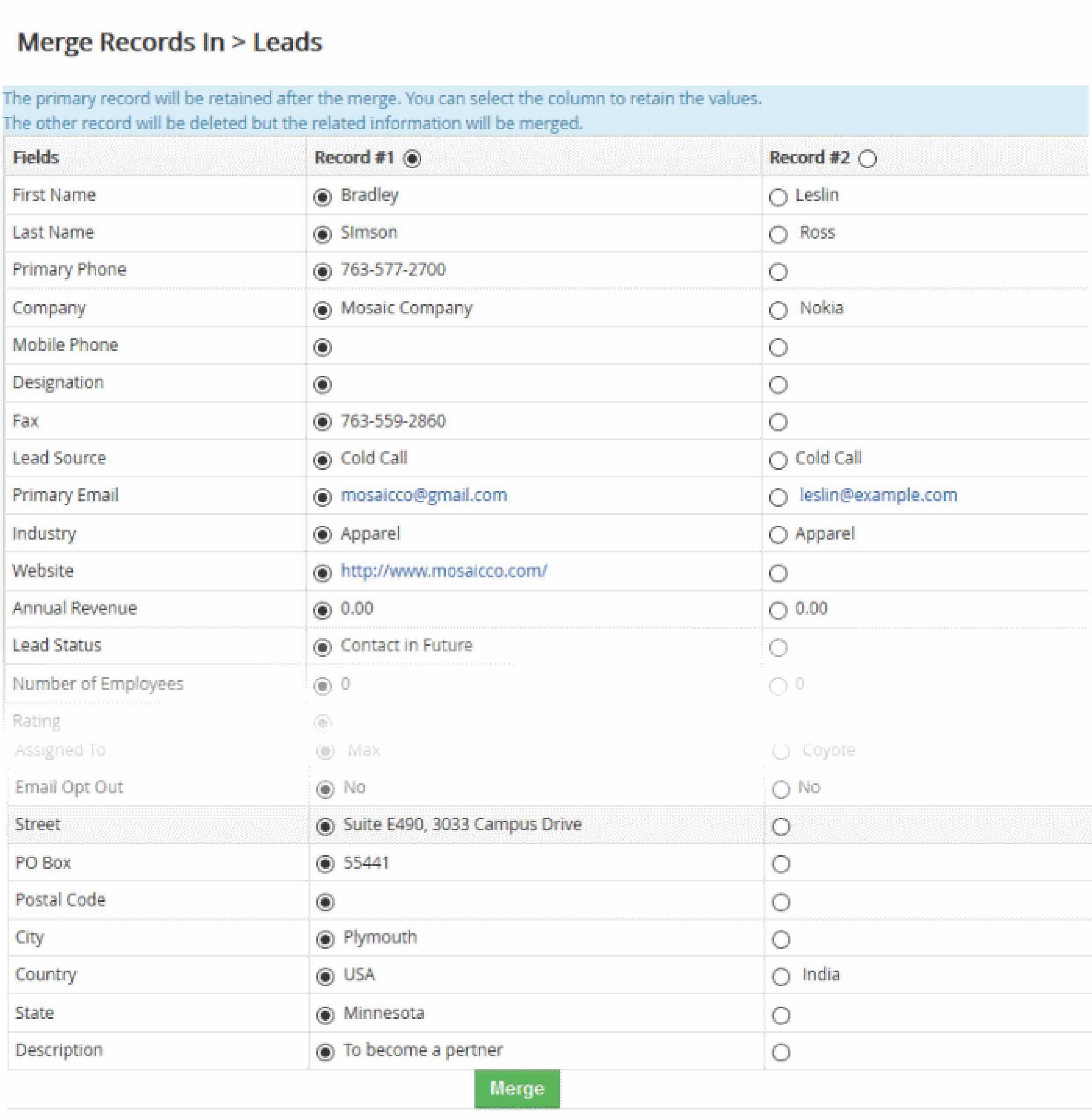


OR

- Select required the records and click 'Merge'



The 'Merge Records > Leads' screen will be displayed.



Merge Records In > Leads

The primary record will be retained after the merge. You can select the column to retain the values.
The other record will be deleted but the related information will be merged.

Fields	Record #1	Record #2
First Name	Bradley	Leslin
Last Name	Simson	Ross
Primary Phone	763-577-2700	
Company	Mosaic Company	Nokia
Mobile Phone		
Designation		
Fax	763-559-2860	
Lead Source	Cold Call	Cold Call
Primary Email	mosaicco@gmail.com	leslin@example.com
Industry	Apparel	Apparel
Website	http://www.mosaicco.com/	
Annual Revenue	0.00	0.00
Lead Status	Contact in Future	
Number of Employees	0	0
Rating		
Assigned To	Max	Coyote
Email Opt Out	No	No
Street	Suite E490, 3033 Campus Drive	
PO Box	55441	
Postal Code		
City	Plymouth	
Country	USA	India
State	Minnesota	
Description	To become a pertner	

Merge

- Choose the field of record no.1 or 2 that you want to merge
- Click 'Merge'.

3.3. Organizations

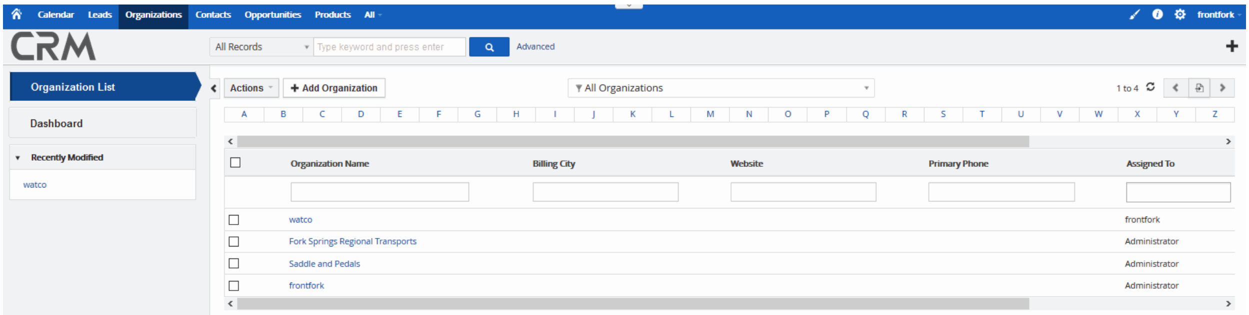
An organization represents a company or an institution that has multiple employees associated with it. Their employees, considered as contacts, can be directly associated to an organization record. You can track business deals through the opportunities of an organization. If the deal is won, the organization will become a customer. If not, you still retain a repository of information about the organization should you do business with them in future.

The 'Organizations' area allows you to add and manage records of new organizations, associate their records with the records of contacts, opportunities, quotes, sales order, invoice and more. You can add events and reminders to each campaign and update organization activities in order to track your progress.

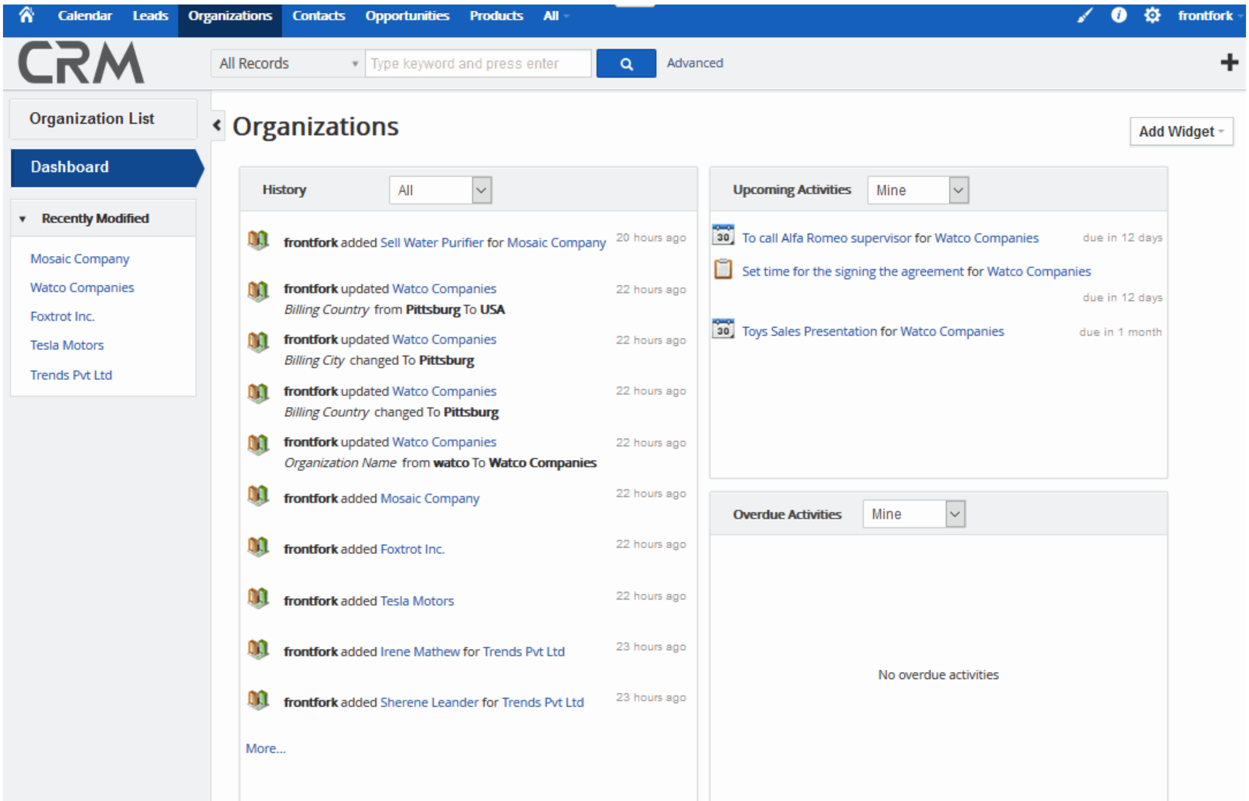
- Click the 'Organizations' button on the top navigation to open the organizations interface.

  OR

- Click 'All' > 'Organizations'



- The 'Organization List' tab on the left contains a list of organizations added to the CRM.
- The 'Dashboard' tab below this contains activities relating to the organizations
- The 'Recently Modified' tab lists organizations which were recently updated. Click any organization in the drop-down to open its details page.



The following sections explain more about each area:

- **Add a new organization**
- **Import and Export Organization Records**
- **Track Organizations**
- **Associate organizations with other records**
- **Mass Management of Organizations**

3.3.1. Add a new Organization

New organizations can be created using as much or as little data as is available to you at the time. Details can include the organization name, contact details, address, industry vertical, annual revenue, assigned staff member and more. These details can be dynamically updated as the relationship with the company progresses.

You can create organization records in four ways:

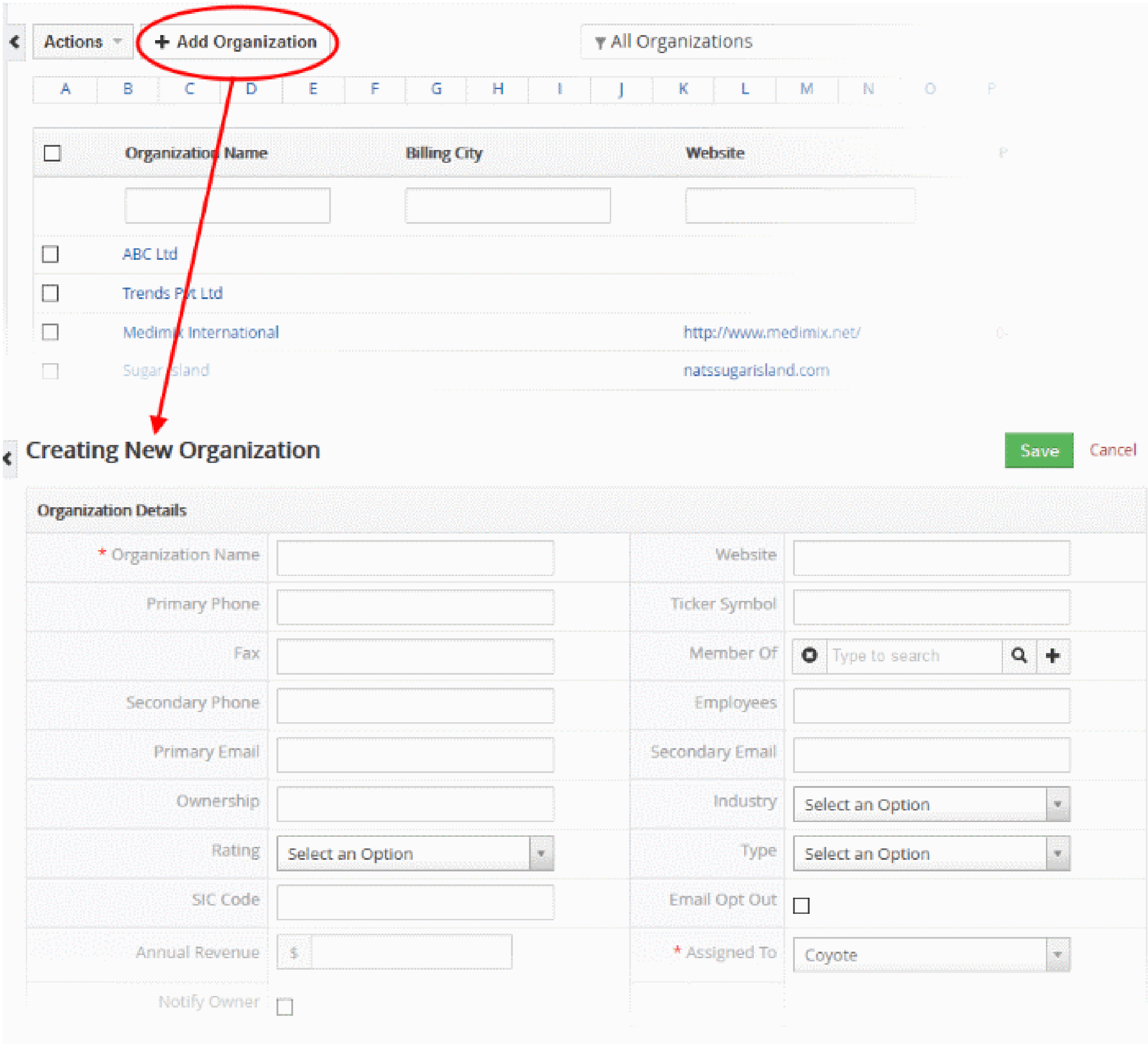
- **Create a new organization record -** Setup a new organization record and specify all its details. See **Create a New Organization Record** for details.
- **Quick create a record -** Create a new organization record with the details you require. Other details can be added later as the business gains momentum. See **Quick Create a Organization Record** for details.
- **Clone a record -** Duplicate an existing record and use it as a starting point to create a new record. See **Clone an Organization Record** for details.
- **Import Organizations -** Prepare a list of organization records in a .csv or .vcf file and import data into 'Organization List' interface. See **Import and Export Records** for details.

Once an organization record is added to the 'Organization List', you can:

- Track the progress of a deal by viewing associated quotes, sales orders, invoices, campaigns, products and services and opportunities. See **Track Organizations** for more details.
- Add activities like scheduled events, meetings and more. See the explanation under Adding Activities for a Organization in **Track Organizations** for more details.
- Associate other records with the organization, including contacts, leads, quotes, invoice, products, services, assets, opportunities and more. See **Associate Organizations with Other Records** for more details.

Create a New Organization Record

- Click 'All' then 'Organizations' (under 'Marketing and Sales'), or click 'Organizations' on the title bar
- Click the 'Add Organization' button
- The 'Create New Organization' page will open. Complete as many details as you have to hand then click 'Save'.



Create New Organization - Form Parameters	
Form Parameter	**Description**
Organization Details	
Organization Name	Specify a name for the organization, shortly describing the organization
Website	Enter the URL of the organization's website
Primary Phone	Enter the main contact number for the lead
Ticker Symbol	Specify the organization's ticker symbol
Fax	Enter the Fax number of the organization
Member of	Enter the name of parent company
Secondary Phone	Enter any secondary email address for the lead
Employees	Enter the number of employees in the organization
Primary Email	Enter the mail email address of the organization

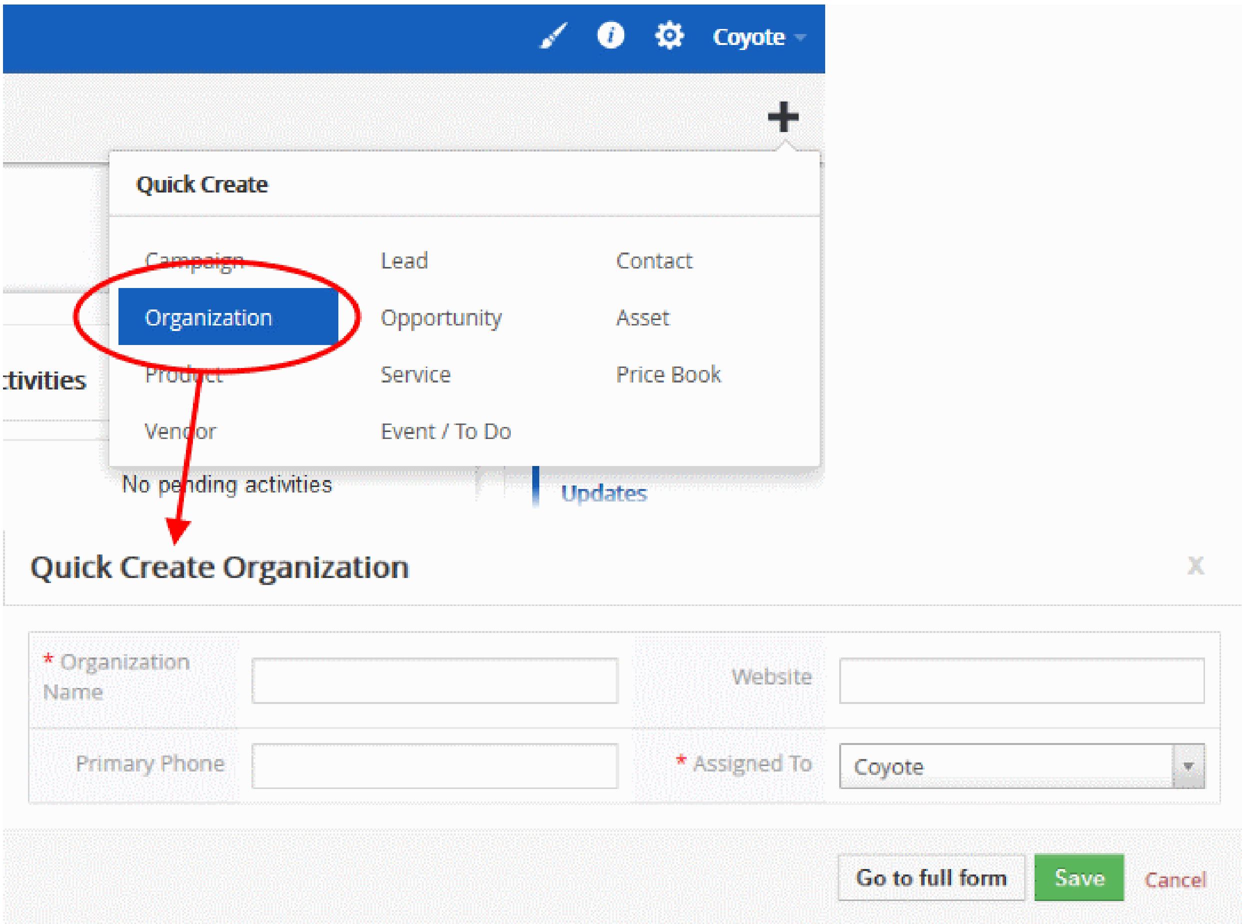
Secondary Email	Enter any secondary email address for the organization
Ownership	Enter the ownership type of the company
Industry	Enter the type of vertical that the lead belongs to
Rating	Enter the a rating for the company
Type	Select the type of organization from the drop down
SIC Code	Enter the Standard Industrial Classification (SIC) codes
Email Opt Out	Specify whether the lead has opted out of email communications.
Annual Revenue	Enter the annual revenue of the company
Assigned To	Enter the name of the staff member to whom the lead is assigned
Notify Owner	If enabled, CRM will notify the staff member to whom the organization record is assigned.
Address Details	
Billing Address	Enter the address details like street name, city, country, postal code and more
Shipping Address	Enter the destination address details for shipping purposes
Billing PO Box	Enter the PO Box number for billing purpose
Shipping PO Box	Enter the PO Box number for shipping purpose
Billing City	Enter the name of city meant for billing purposes
Shipping City	Enter the name of destination city for shipping purposes
Billing State	Enter the name of state meant for billing purposes
Shipping State	Enter the name of destination state for shipping purposes
Billing Postal Code	Enter the postal code meant for billing purpose
Shipping Postal Code	Enter the postal code meant for shipping
Billing Country	Enter the name of country for billing purposes
Shipping Country	Enter the name of destination country for shipping purposes
Description Details	
Description	Enter a description for the organization.

The organization record will be saved and added to the list of organization records in the 'Organization List' interface.

Quick Create a Record

The 'Quick Create' option allows you to create a organization record from any interface, within a short time. It requires you to enter only the basic details.

- Click the '+' button at the top right from any interface of CRM and choose 'Organization' from the options.



- Fill-in the organization details in the Quick Create Organization' dialog. Descriptions of the form parameters are available in the **this table**.
- If you want to view and enter all details, click 'Go to the full form'
- Click 'Save'

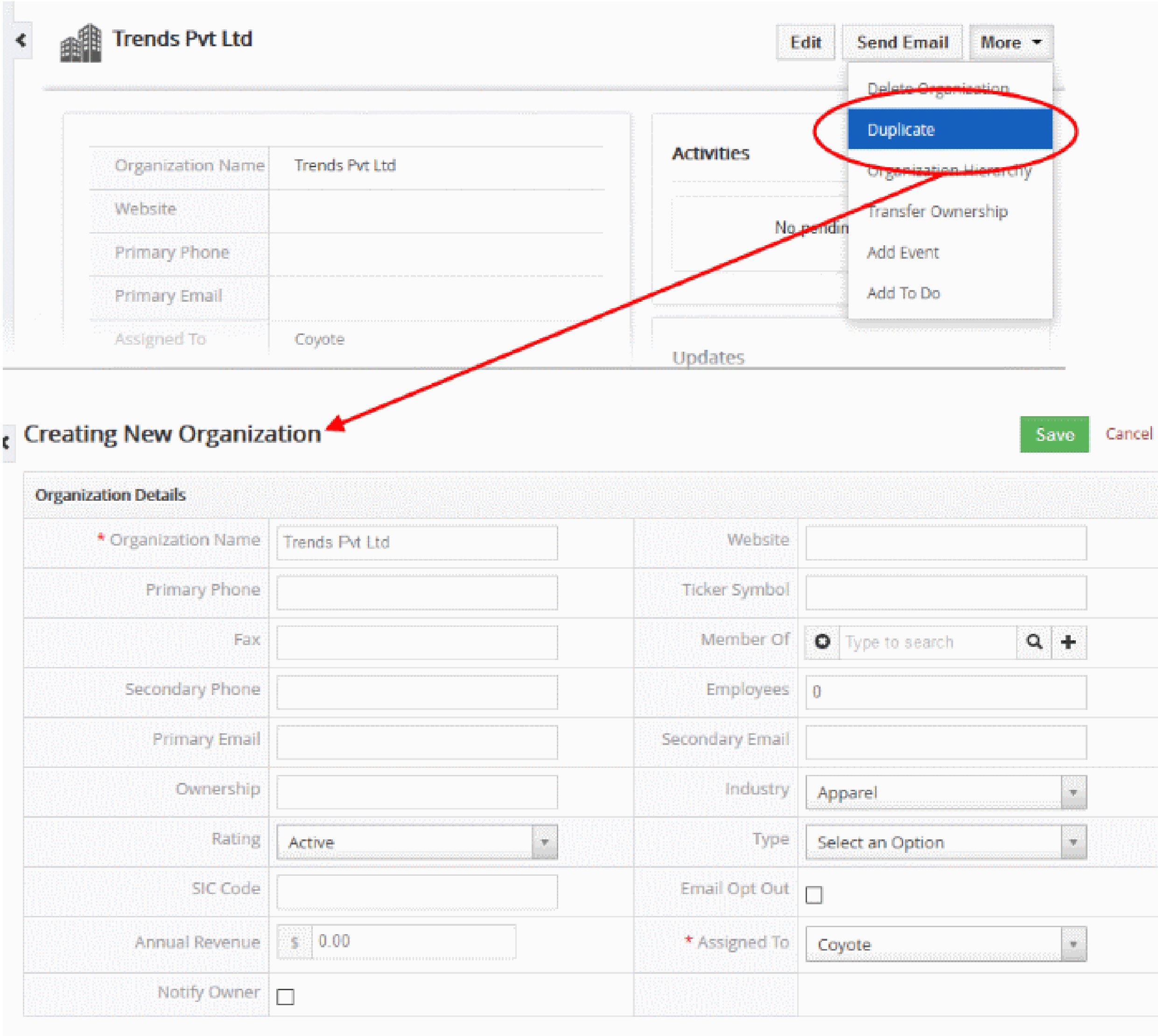
The record will be saved and added to the list of organization records in the 'Organizations' interface. You can open the summary interface for the record by clicking the organization name and add/edit the details as required at anytime.

Clone a Organization Record

CRM allows you to create a new organization record using an existing record as a template. You can then edit the cloned record according to the requirements of your new organization. This is useful when you find a company has the same requirement of product/service for which a organization exists already, for a new type of organization, using a new industry type and more.

To clone a organization record

- Click 'All' on the title bar and choose 'Organization' under 'Marketing and Sales' to open the 'Organization List' interface
- Click on the name of the organization record you want to clone to open the the 'Organization Details' interface
- Click 'More' on the top right and choose 'Duplicate'



The 'Creating New Organization' form will open with the details populated from the original record.

- Enter a new name for the new organization
- Edit the details as required. Descriptions of the form parameters are available in the **table above**.
- Click 'Save'.

The organization record will be saved and added to the list of organization records in the 'Organization List' interface.

3.3.2. Manage Organizations

- The 'Organization List' interface lets you view and update organization details, including address and shipping information. You can also view the historic details of updates made by Staff members and add comments to the organization record.
- The staff members can schedule activities and events for the organization from this interface. The activities will be reflected in the calendars of team members assigned to the organization.
- You can associate records of other modules like opportunities, quotes, sales order, invoice, email, product, organizational assets and more to an organization.

To view organization details:

- Click 'All' > 'Organization' to open the ' Organization List' interface
- Click on an organization name to open the 'Organization Summary' interface

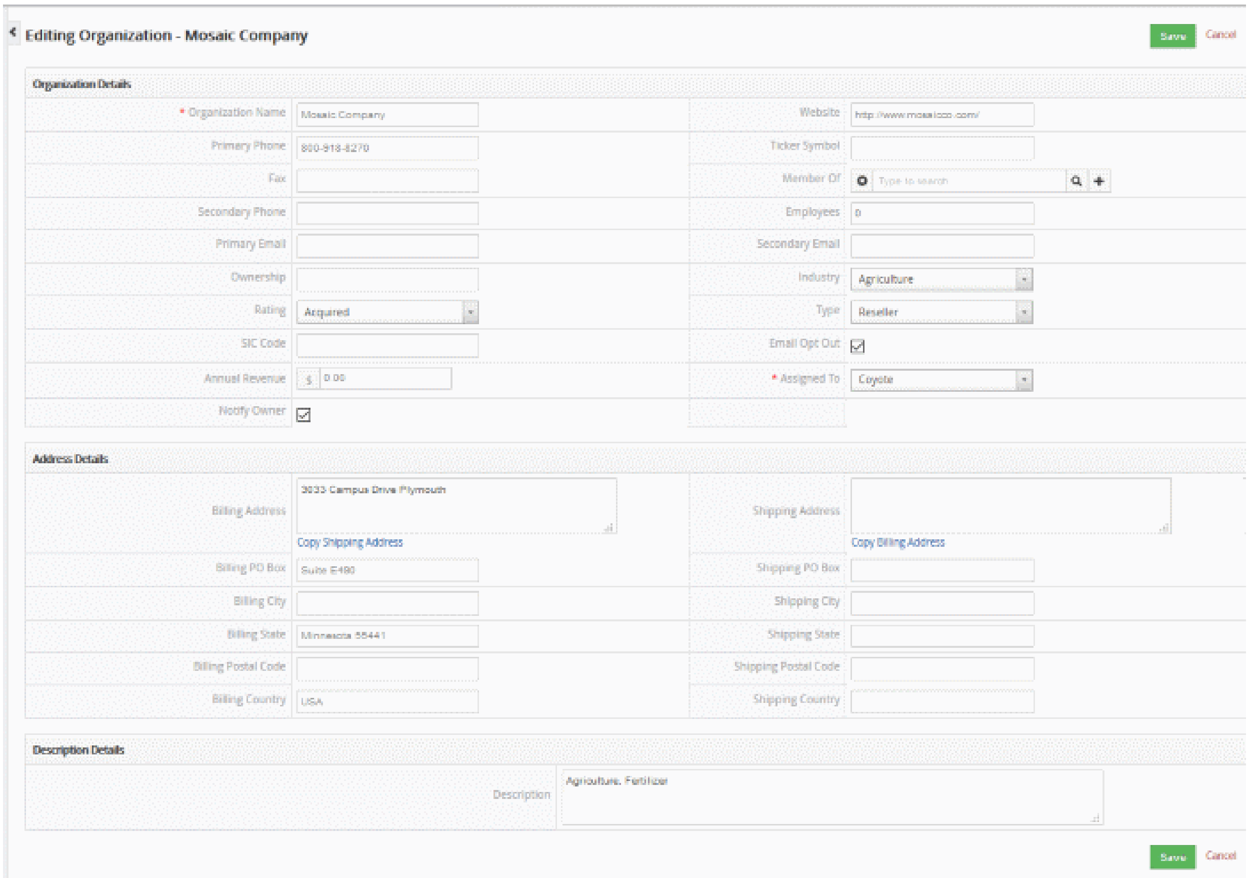
- To see even more information, click 'Organization Details' on the right-hand menu

You can edit an organization record in three ways:

- Click 'All' > 'Organization' to open the ' Organization List' interface
- Click on an organization's name and then the 'Edit' button from the 'Actions' menu

  OR
- Open and organization record and then click 'Edit on the top right of the Organization

  OR
- Click 'All' > 'Organization' to open the 'Organization List' interface
- Place your mouse cursor over the name of an organization to reveal the action buttons on the right of the row.
- Click the 'pencil' icon to open the organization edit interface:



- See **this table** for descriptions of the fields in the 'Organization Details' interface
- Administrators can edit an organization to update it with the latest organization progress

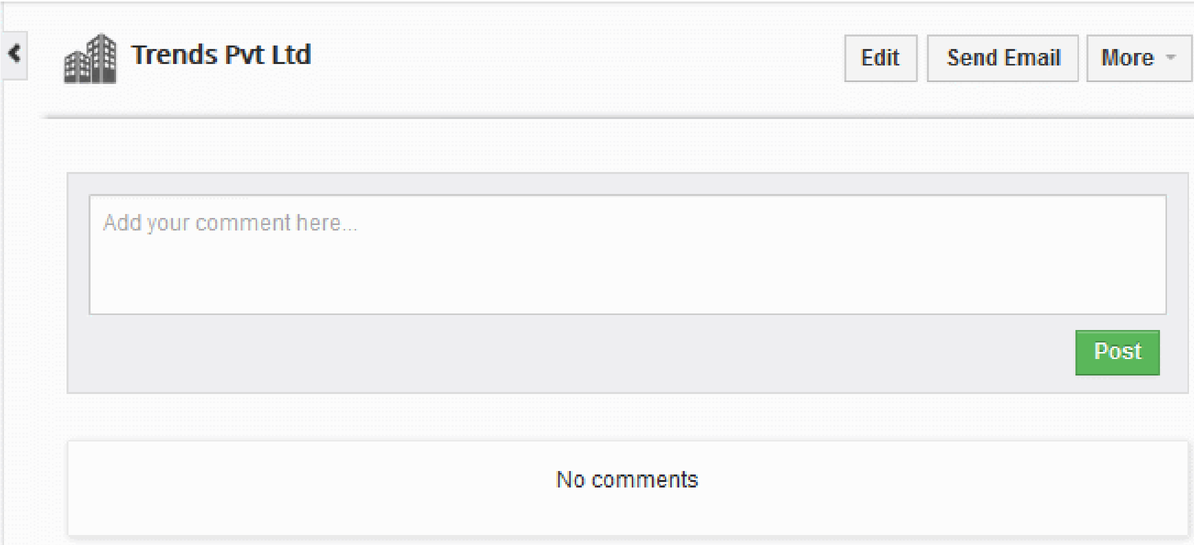
Comments

The comments part of the organization record allows staff to post internal memos about the organization.

To view a comment in a record:

- Click 'All' > 'Organizations' (under 'Marketing and Sales') to open the 'Organization List' interface
- Choose an organization record and enter your comments and then click 'Post'.

  OR
- Click 'Comments' in the 'Organization Summary' interface.
- Enter your comments and click 'Post'.



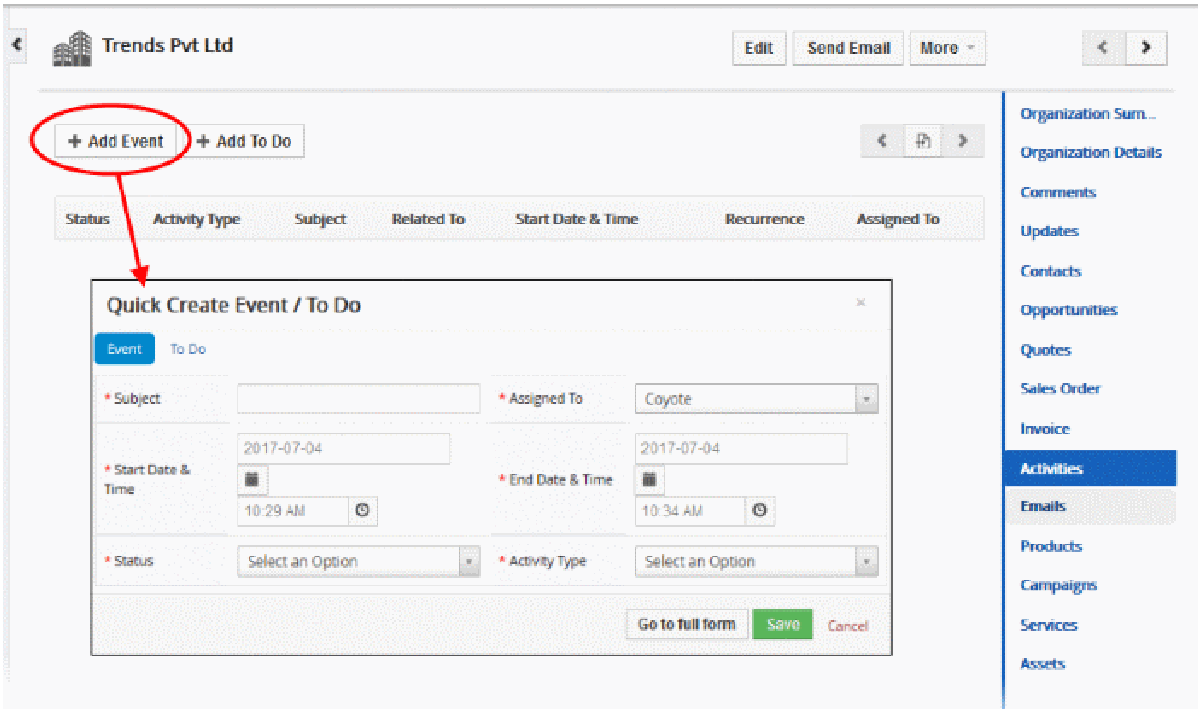
Activities

Activities consist of 'Events' (meetings, calls, webinars etc) and 'To Dos' (product delivery, purchase etc). Administrators can add 'Activities' to a organization and these will be added to the CRM calendar. Activities can be viewed by administrators and staff members to whom the lead is assigned. Assigned staff and administrators can add an 'Event' or 'To Do' as an activity of an organization record.

To create an Event/To Do:

- Click 'All' > 'Organization' (under 'Marketing and Sales') to open the 'Organization List' interface
- Choose a lead then click 'Activities' from the menu on the right
- Click 'Add Event' or 'To Do' in the activities interface.

  OR
- Click 'More' on the top right of any of the organization interfaces from the right pane.
- Choose 'Add Event' or 'To Do' in the drop down menu.



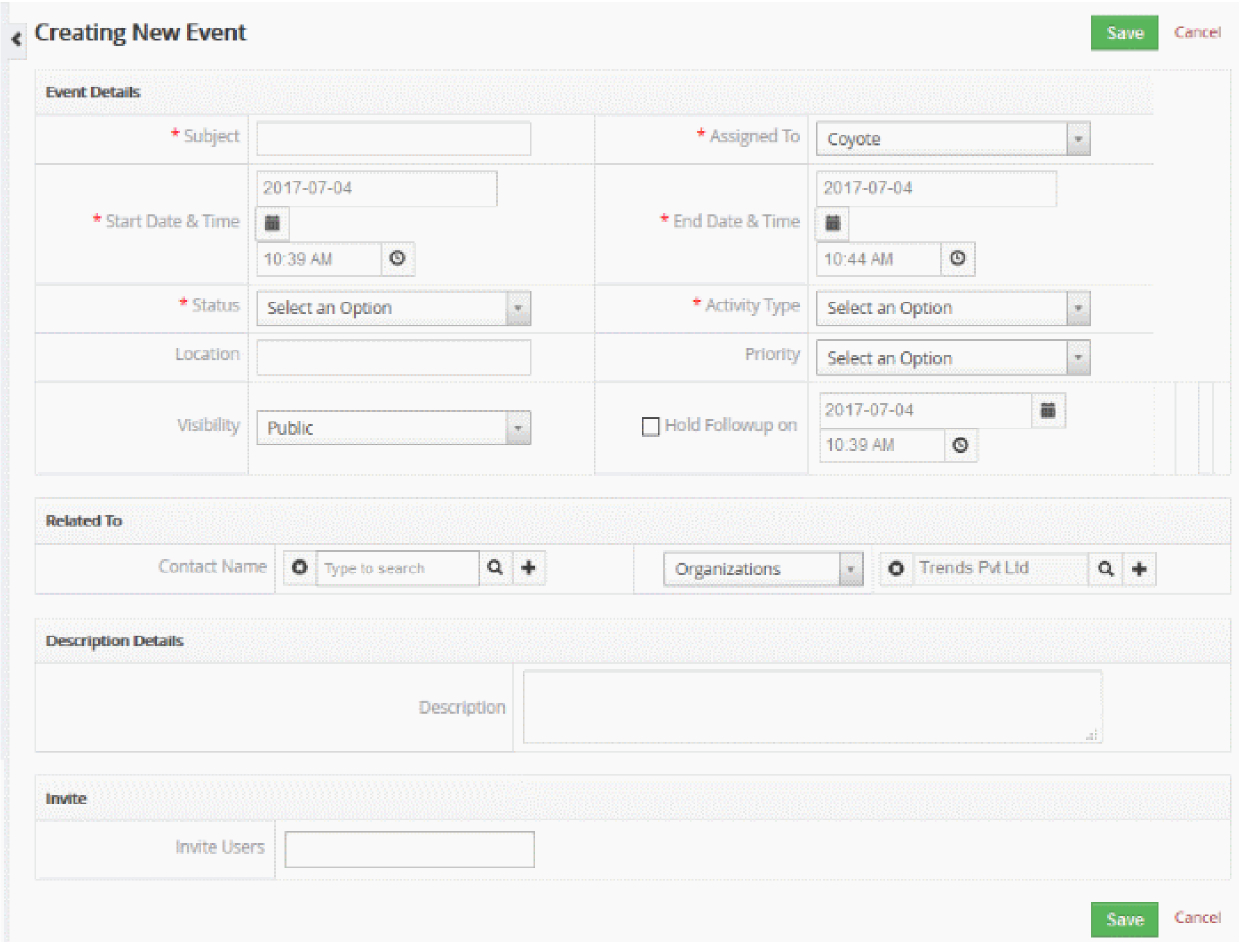
The event / to-do dialog will open:

- Complete your event details and click 'Save'.

Please note that the 'Activity Type' option is only available for quick events.

The information in the quick event dialog is basic in nature and will be used to populate the calendar entry. Use the 'full form' if you want to create a detailed event with more information (priority, visibility etc).

- To create a detailed event, click the 'Go to full form' button in the quick event dialog:



- Enter the required details and click 'Save'.

See the section **Managing Shared Calendar** for more details on the 'Event/To Do' full form.

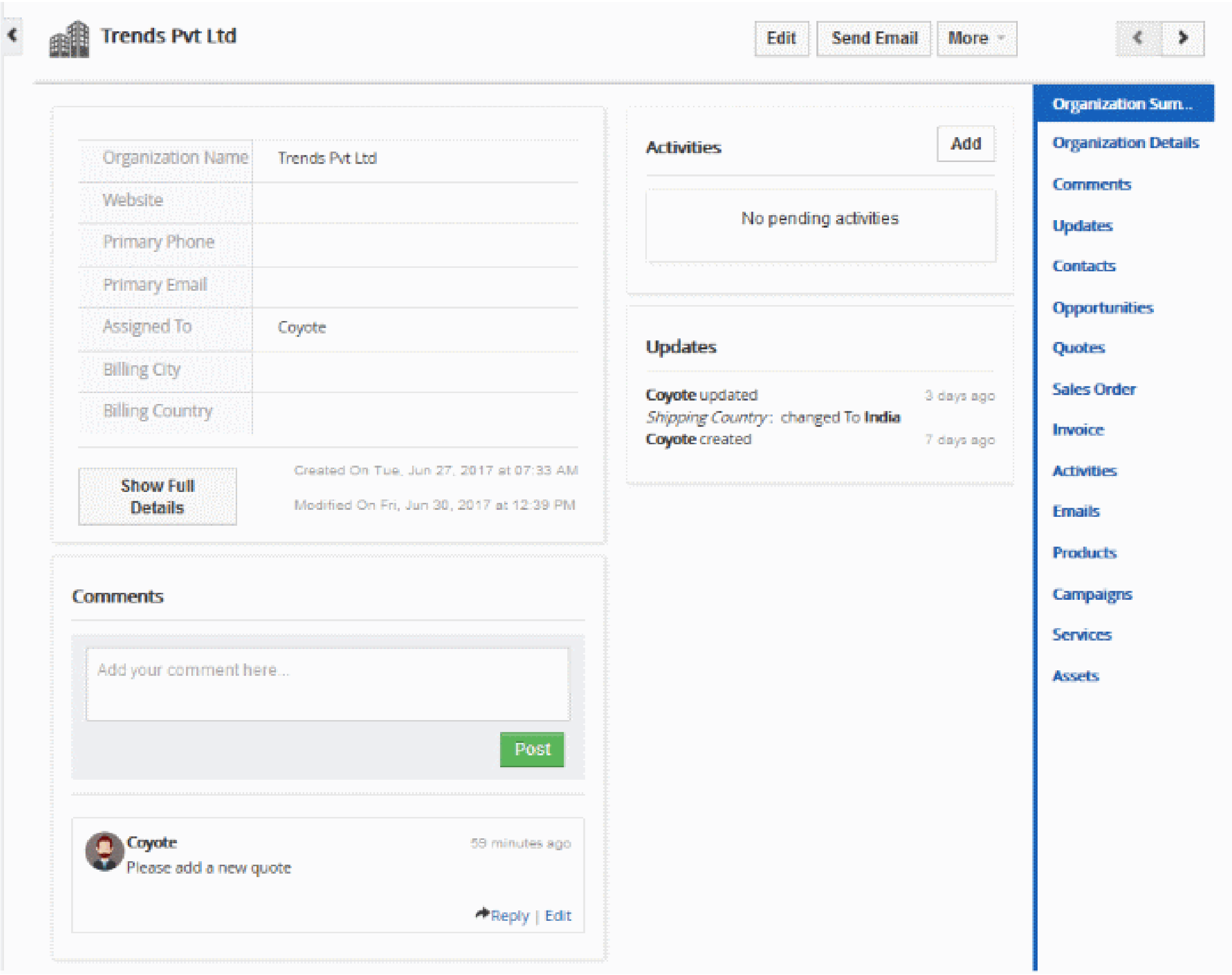
3.3.3. Associate Records from Other Modules to an Organization

The 'Organization Summary' interface lets you associate organization records with other CRM records, including contacts, opportunities, quotes, invoices and more.

To view and manage the contact records associated with a organization record

- Click 'All' > 'Organizations' (under 'Marketing and Sales') to open the 'Organization List' interface
- Click any organization record to open the organization's summary page.
- To view detailed information of the organization, click 'Organization Details' on the right pane.

The right of the interface contains links to records in other modules which have been associated with the organization:

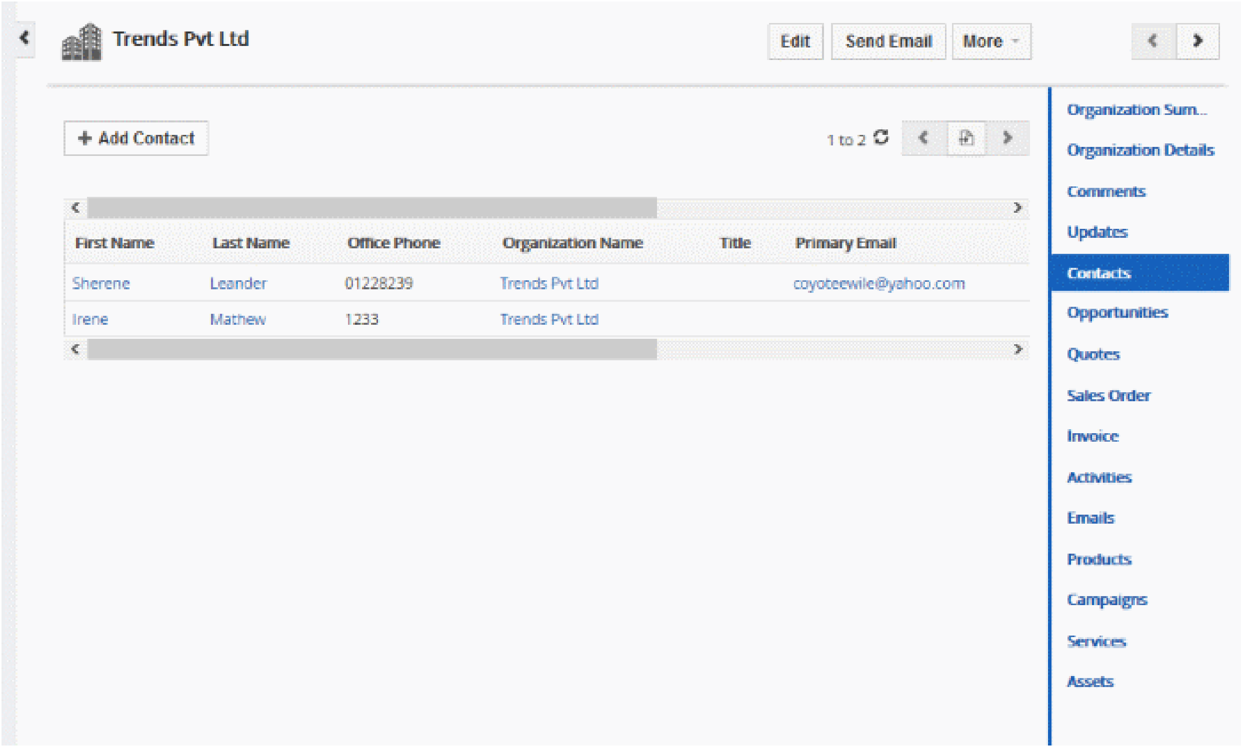


You can use these links to create a record in another module which will be linked to the organization record.

- Contacts - View and edit existing contacts associated with the organization. Create a new contact and associate with the organization record
- Opportunities - Add opportunities to the organization. Associate a new opportunity with the record.
- Quotes - Add quotes to the organization. Associate a new quote with the record.
- Sales Order - Add sales orders to the organization. Associate a new sales order with the record.
- Invoice - Add invoices to the organization. Associate a new invoice with the record.
- Activities - View and edit existing activities associated with the organization. Add new events and 'To-Do's.
- Emails - View, create and send emails to the organization
- Products - Add products to the organization. Associate a new product with the record.
- Campaigns - Add campaign to the organization. Associate a new campaign with the record.
- Services - Select services to the organization. Associate a new services with the record.
- Assets - Add assets to the organization. Associate a new asset with the record.

The example below describes how to associate 'Contact' records with a organization. The same process can be applied to other record types. Note. Of course, if you haven't done so already, you need to create some contact records first.

- Open an organization as described earlier then click 'Contacts' in the menu on the right



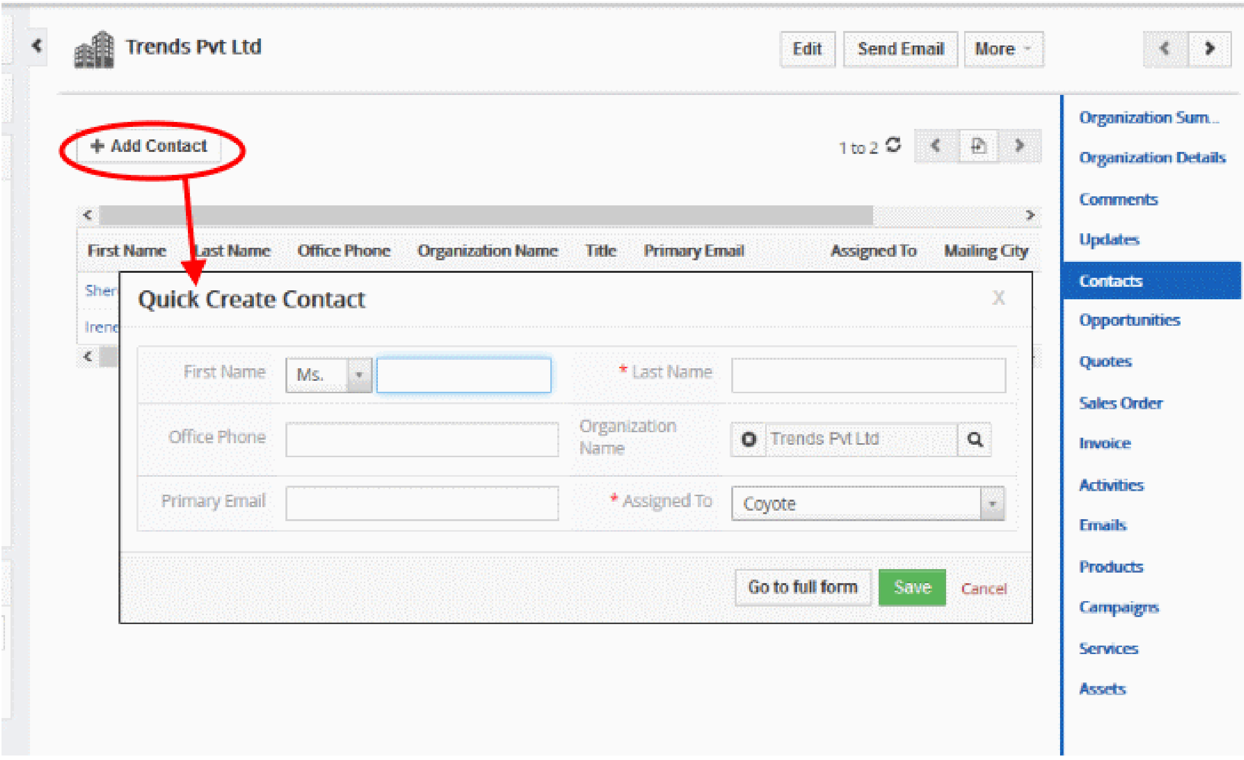
The interface allows you to:

- **Add a new contact record to the organization**
- **Manage created contact record**
- **Transfer ownership to other staff member**
- **View Organizational Hierarchy**
- **Create a duplicate record of existing organization**

CRM also allows you to send emails to selected persons from anywhere in the Organization interface. See **Emails** to know about sending emails.

Add new Contact Record to the organization

- Click 'Add Contacts' OR click the '+' symbol at top right then select 'Contact'
- Overwrite the contact's current address (if any) if you wish to replace it with this organization's address:



The 'Quick Create Contact' dialog will appear.

- Complete the contacts details with as much information as you have and click 'Save'.
- The information in the 'Quick Create Product' dialog is basic in nature. Use the 'full form' if you want to add more details for the contact.

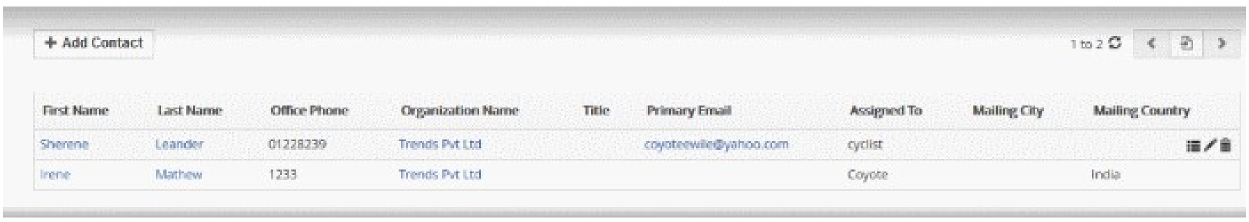
Note - If you want to assign existing contacts to the organization instead, then you need to go through the 'Contacts' interface:

- Individual contacts - Click 'Contacts' > Click the name of the contact you want to add > Click 'Edit' > 'Organization Name' field - type the name of the organization to which you want to add the contact > Click 'Save'
- Multiple contacts - Click 'Contacts' > Select the check-boxes of all contacts you want to add > Click 'Actions' > 'Edit' > Type the name of the target organization in the 'Organization Name' field > Click 'Save'.

Manage Associated Contact

You can view full details of a contact, edit or remove a contact from the associated organization.

- Mouse over a contact record to view the options at the far right end of the row



 - View contact details. See Contacts for more details.

 - Edit contacts details. See Contacts for more details.

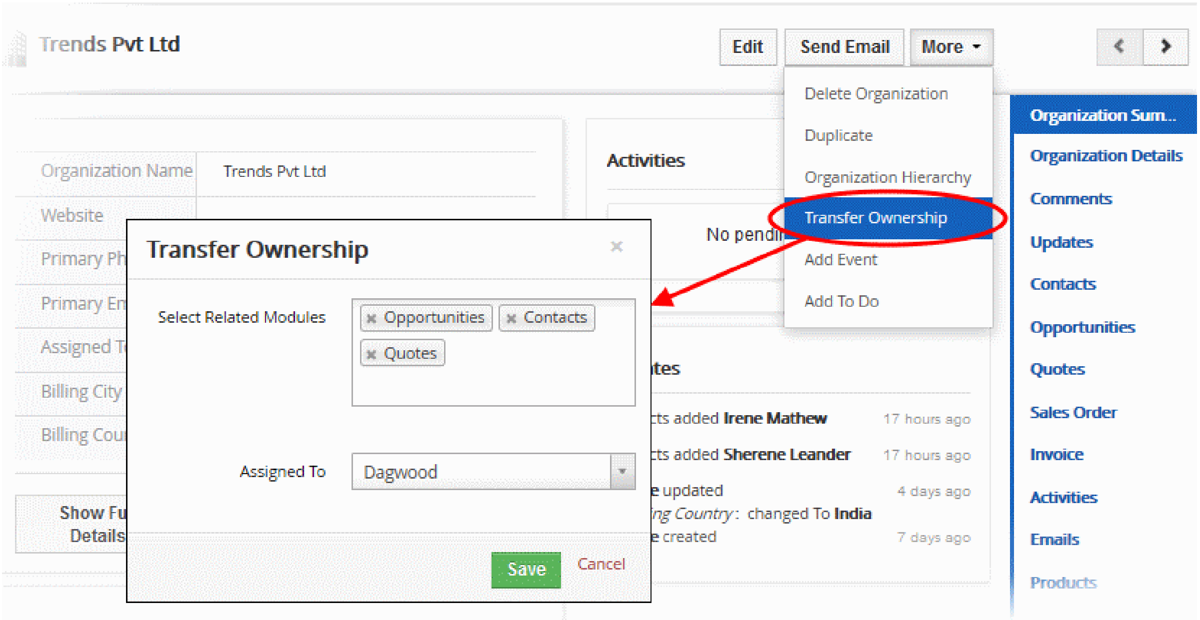
 - Removes the contact's association with the organization.

Transfer ownership

You can transfer the ownership of the organization to another staff member at any point of the sales stages.

To transfer ownership:

- Click 'All' > 'Organizations' (under 'Marketing and Sales') to open the 'Organization List' interface
- Select an organization to be edited
- Click 'More' and choose 'Transfer Ownership' in the 'Organization Summary' interface.

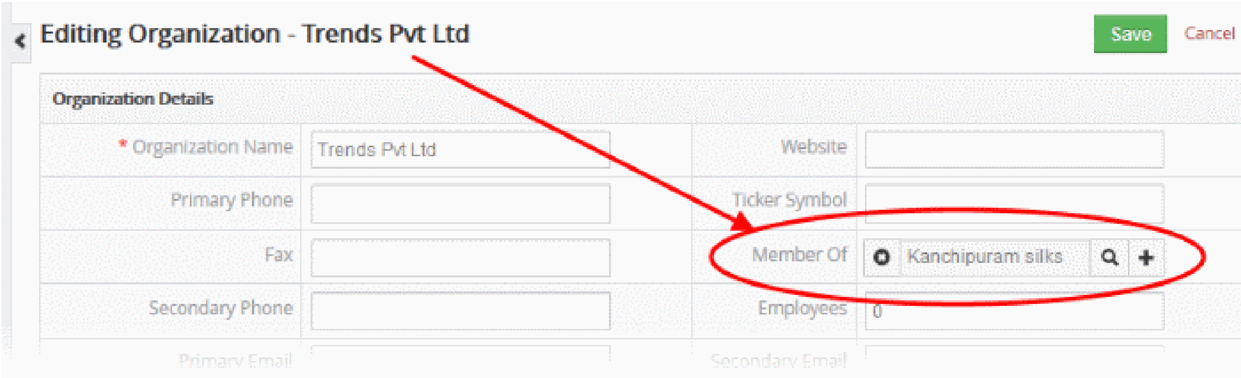


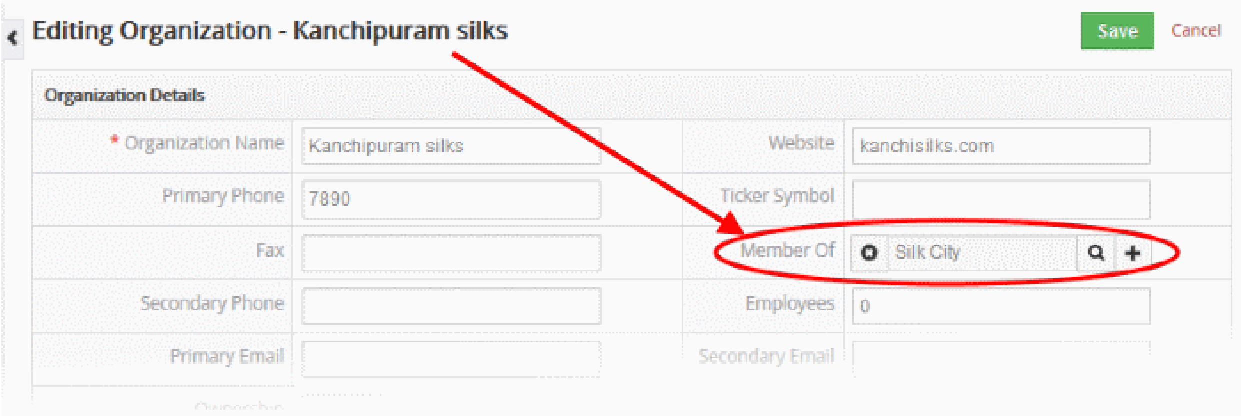
The 'Transfer Ownership' dialog will be displayed.

- Select the organization's related modules based on the information associated and then choose the staff member you want to assign.
- Click 'Save'

View Organizational Hierarchy

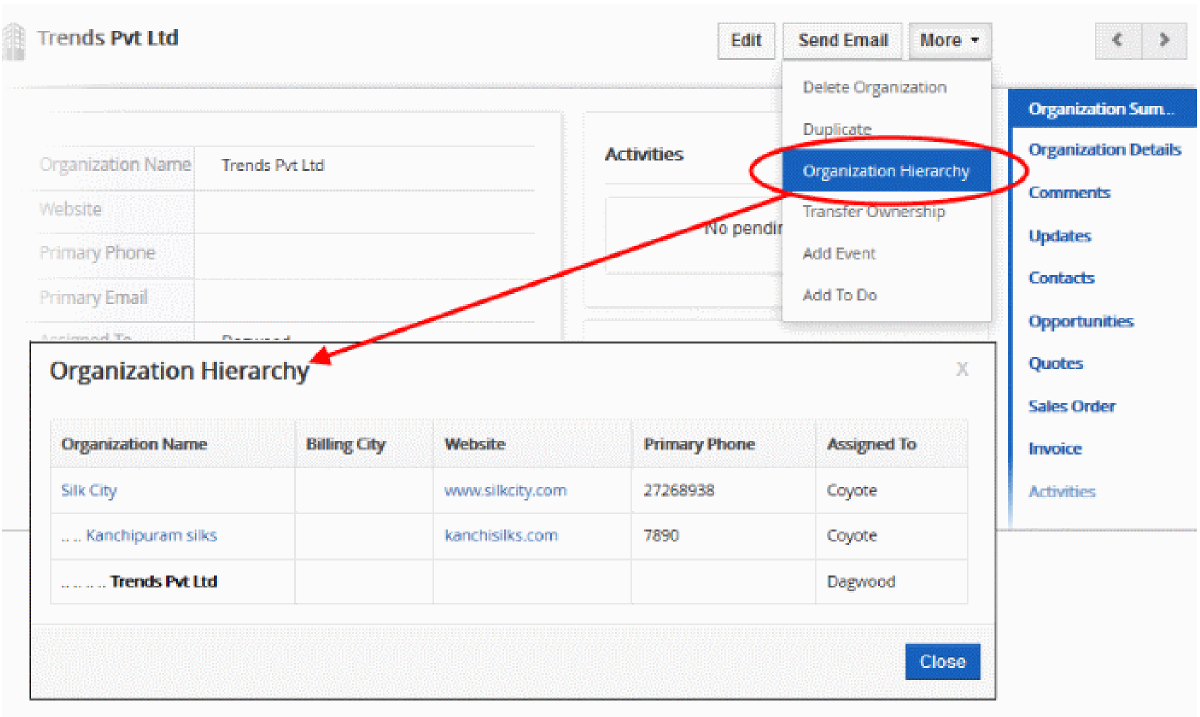
CRM allows you to view the organizational architecture in a hierarchical manner if you have entered the parent company details in the 'Member of' field.





To view the organization's hierarchy

- Click 'All' > 'Organization' (under 'Marketing and Sales') to open the 'Organization List' interface
- Select an organization to be edited
- Click 'More' and choose 'Organizational Hierarchy'



The 'Organization Hierarchy' dialog will be displayed. You can view the parent company details by clicking on the name of the company.

Create a duplicate record of existing organization

You can create a new organization record based an existing record. See '**Clone an Organization Record**' for more details.

3.3.4. Mass Management of Organizations

CRM allows you to edit, delete, add comments, send emails and 'Transfer Ownership' for multiple organizations simultaneously. This is useful when you are updating or altering details that are common to a set of organization records. For example, may have several organizations with different owners, different sale orders and different projected revenues, but would like to pass a common comment to staff assigned to those organizations.

Tip: If you want to update the details of a ***single*** Organization record:

- Open the 'organization List', click the organization name then click the 'Edit' button.
- See '**Track Organizations**' for more details.

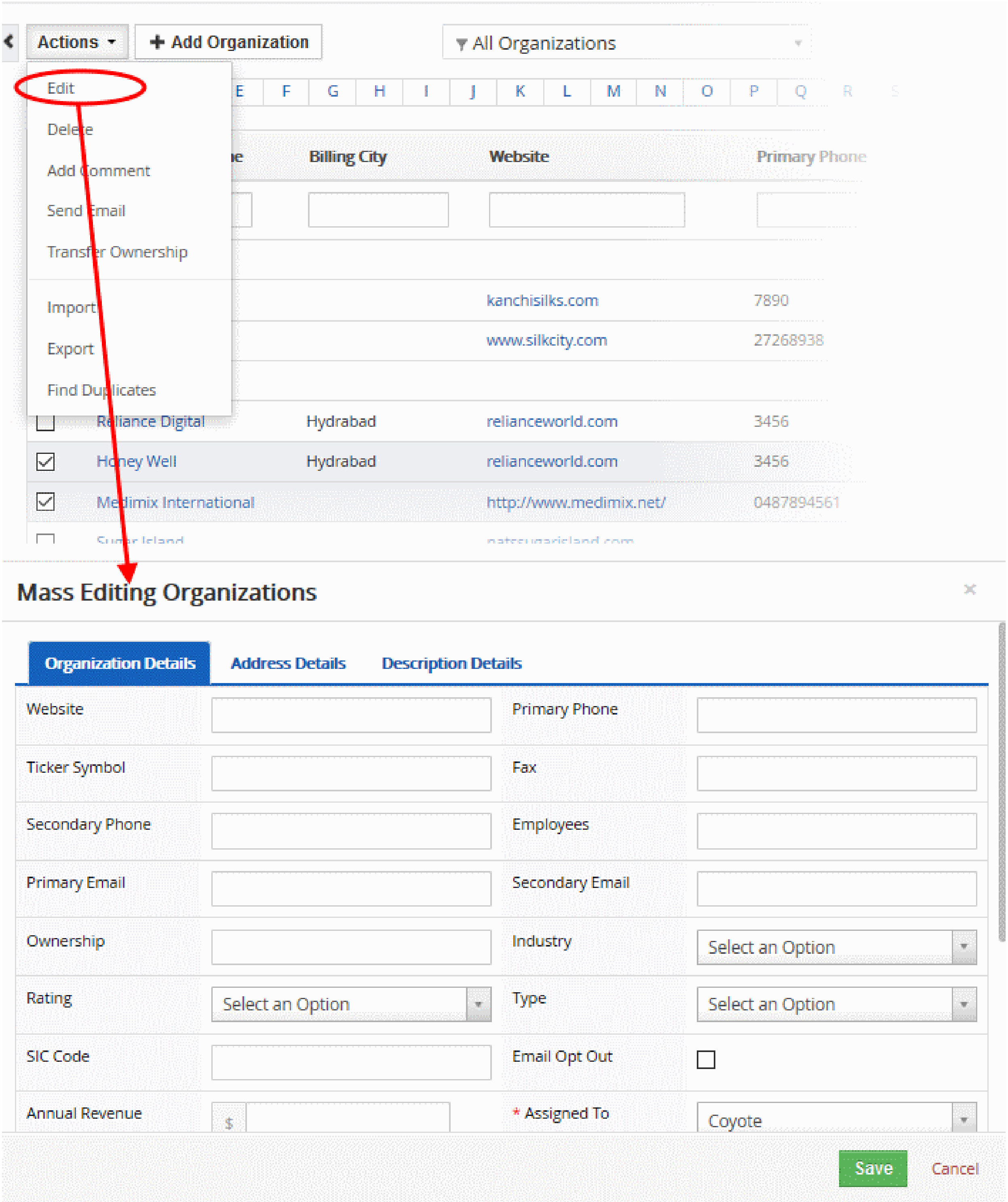
The interface allows you to:

- **Edit organization records**
- **Delete organization records**
- **Add comments**
- **Send Email**
- **Transfer Ownership**
- **Import / Export Organization records**
- **Find Duplicates**

To edit common details of several organizations

- Click 'All' > 'Organizations' (under 'Marketing and Sales') to open the 'Organizations List' interface
- Select the organizations to be edited
- Click 'Actions' and choose 'Edit'

The 'Mass Editing Organizations' pop-up will appear

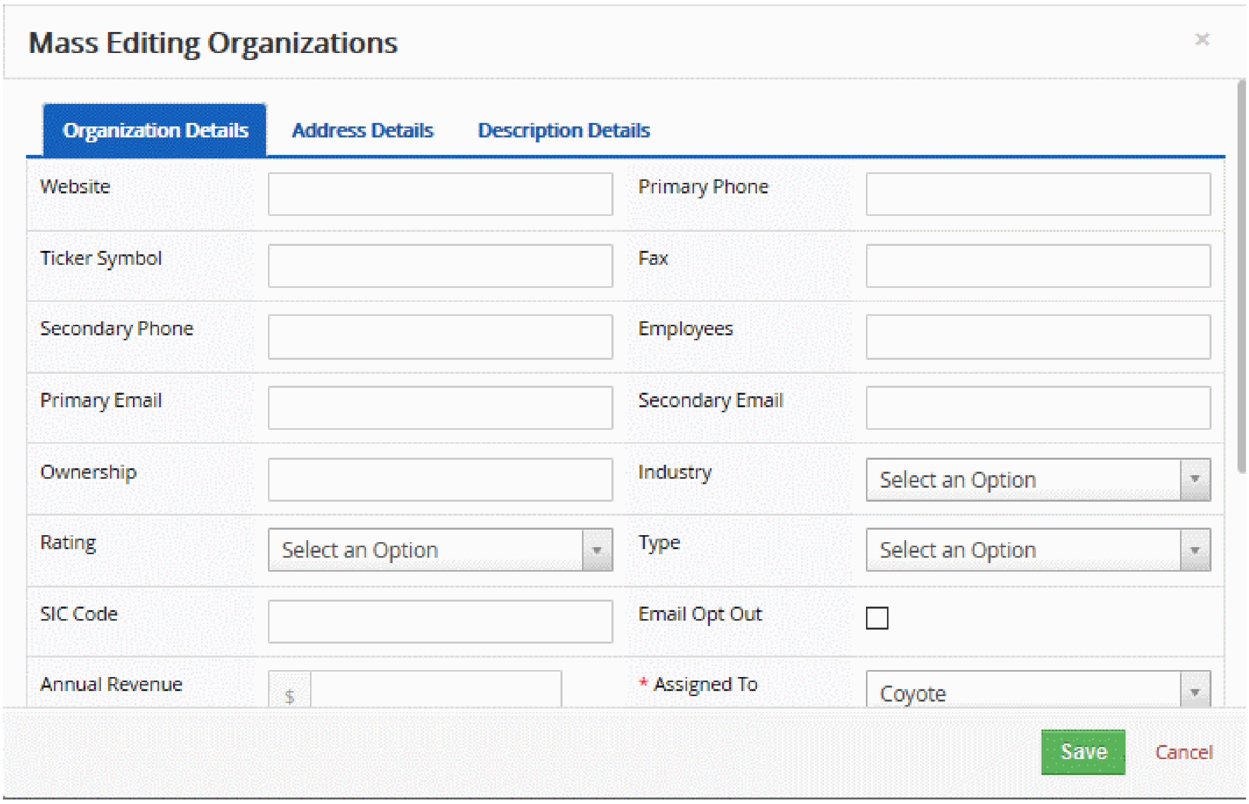


It contains three tabs:

- **Organization Details**
- **Address Details**
- **Description Details**

Organization Details

The 'Organization Details' tab allows you to enter new values for website, primary phone, ticker symbol, fax and more.



- Enter the new values for the parameters. See **this table** for descriptions of the fields in the 'Organization Details' tab
- Click 'Save'.

Address Details

The 'Address Details' tab allows you to update billing address, shipping address,billing city, shipping city details and more if the organizations have this information in common.

- Enter the new values for the parameters. See **this table** for descriptions of the fields in the 'Address Details' tab
- Click 'Save'.

Description Details

The 'Description Details' tab allows you to enter a common description for the selected organization records.

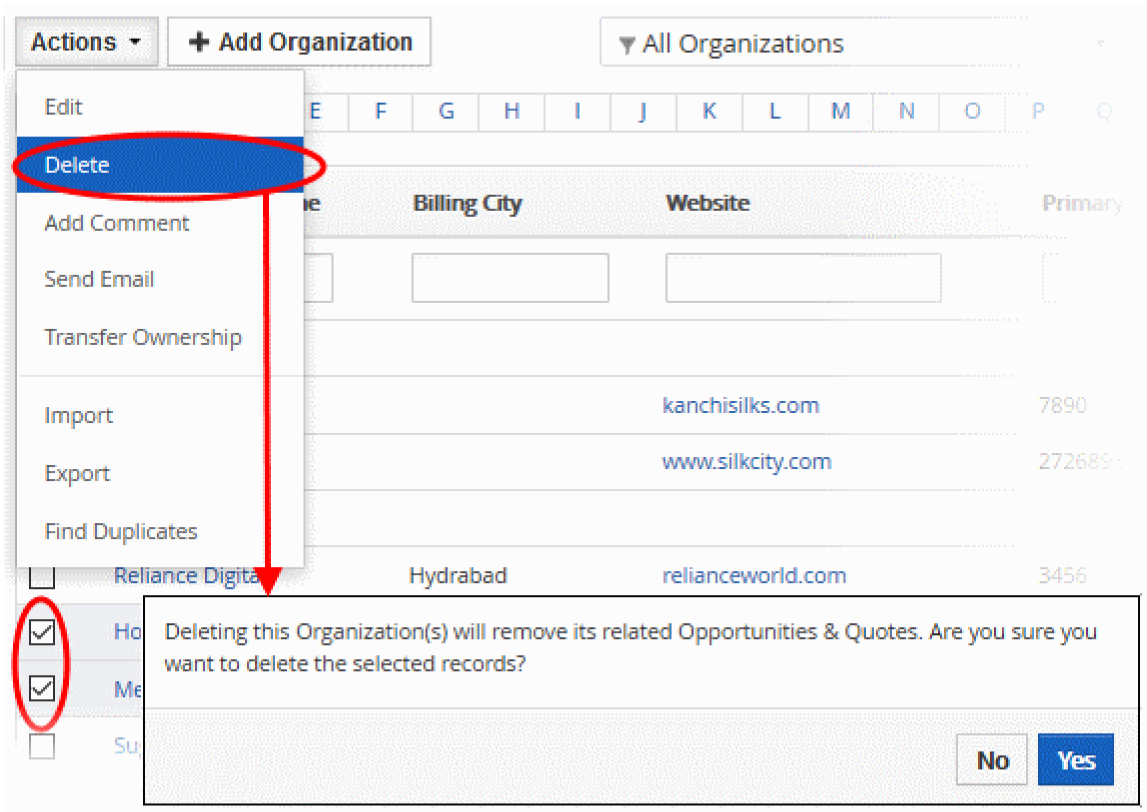
- Enter the new description and click 'Save'

Delete Organization Records

Records for the organization that are no longer required can be removed.

To remove organization records:

- Click 'All' > 'Organization' (under 'Marketing and Sales') to open the 'Organization List' interface
- Select the Organization(s) to be deleted
- Click 'Actions' and choose 'Delete' button.



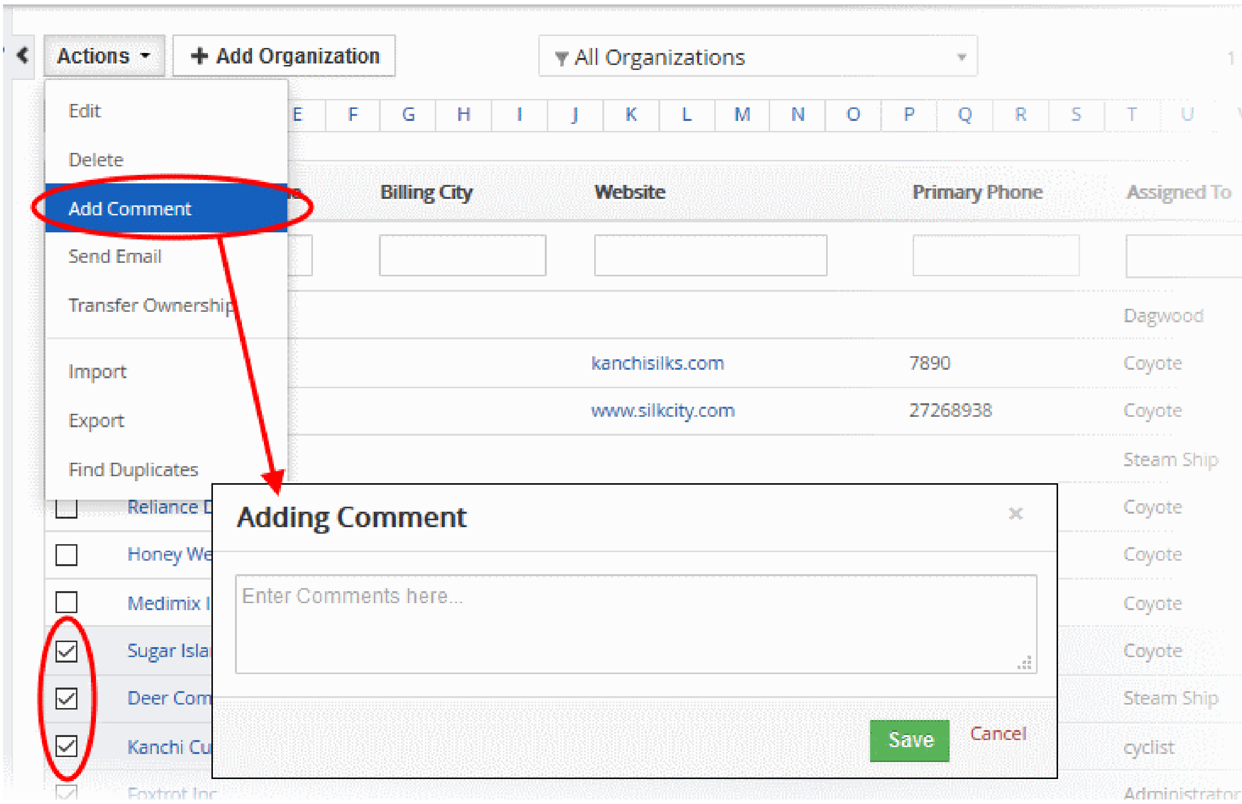
- Confirm the deletion by clicking 'Yes'

Add Comments to Organization Records

You can enter a comment that needs to updated for more than one organization record

To do this:

- Click 'All' > 'Organizations' (under 'Marketing and Sales') to open the 'Organization List' interface
- Select the Organization(s) to which you need to add comment.
- Click 'Add Comment' and type your message



- Click 'Save'

Send Email

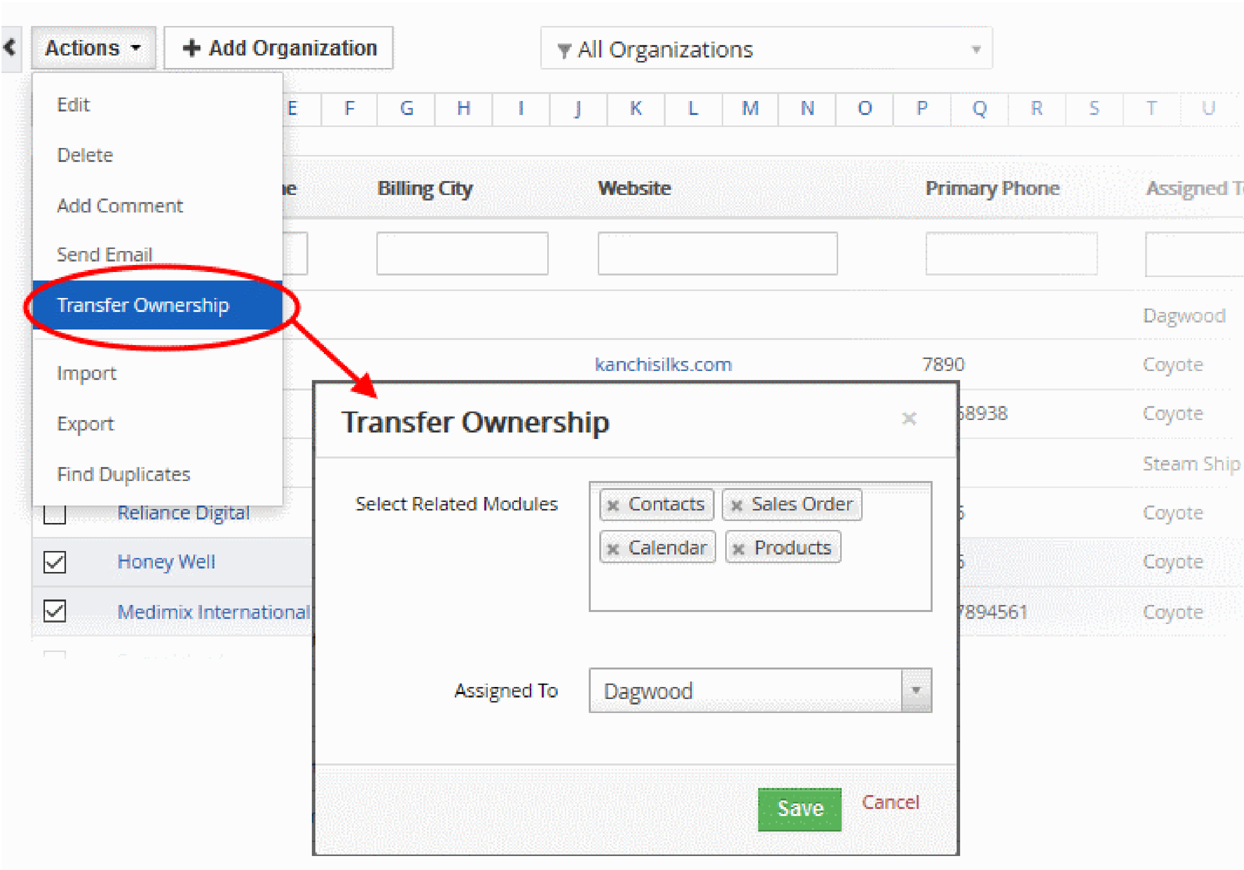
You can send mails to multiple contacts in an organization at once. See **Emails** to know how send mails to multiple recipients.

Transfer Ownership

You can transfer ownership of multiple organization records to another staff member at once.

To do this:

- Click 'All' > 'Organizations' (under 'Marketing and Sales') to open the 'Organization List' interface
- Select the Organization(s) for which you need to transfer the owner
- Click 'Transfer Ownership'



The 'Transfer Ownership' dialog will be displayed.

- You can transfer all information to the new assignee, or only selected modules. Select the modules you wish to transfer then the staff member to whom you want to assign the records.
- Click 'Save'

Import / Export Organization Records

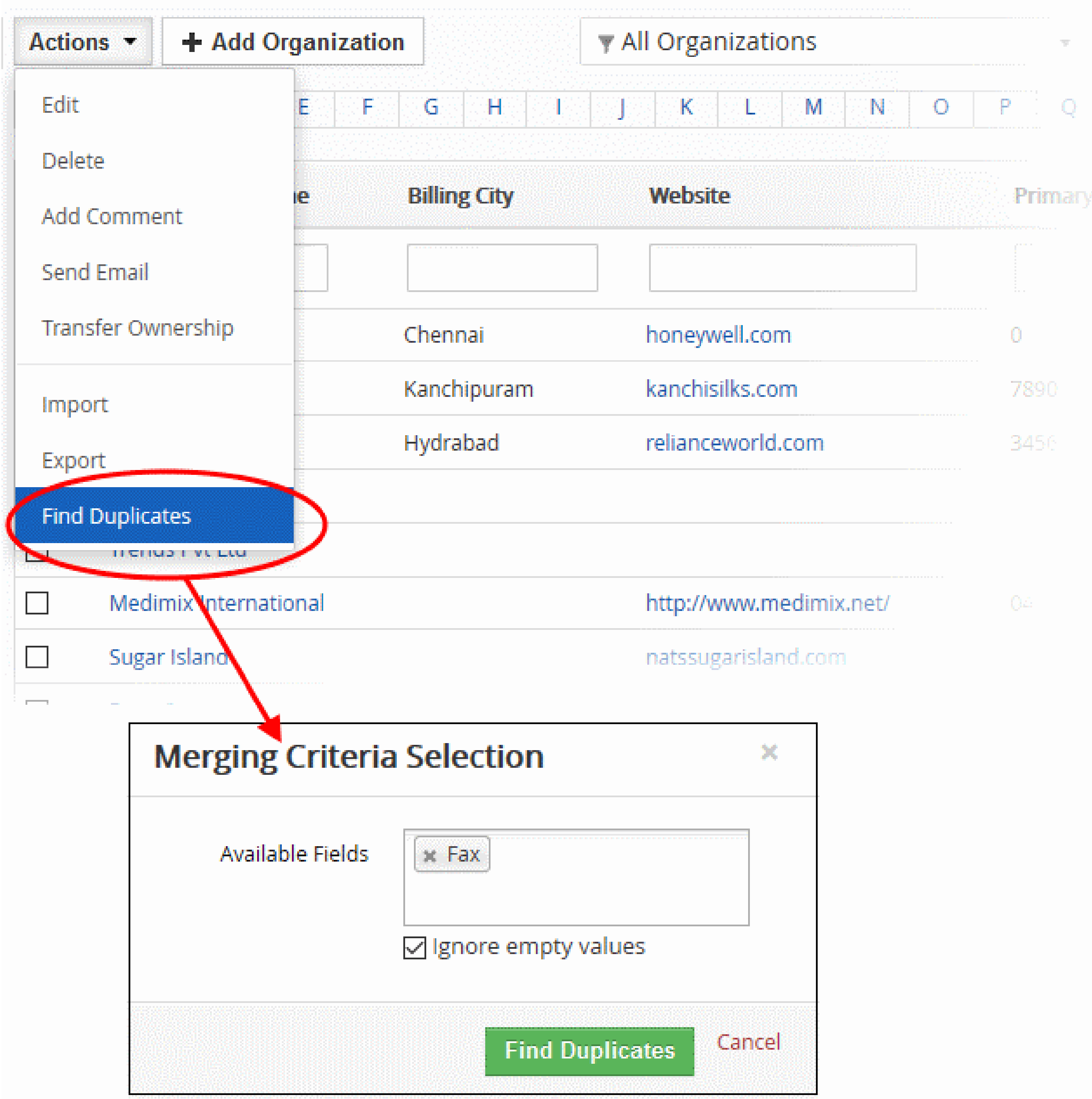
You can import saved records and export opportunities records from this interface. See '**Import and Export Records**' for more information.

Find Duplicates

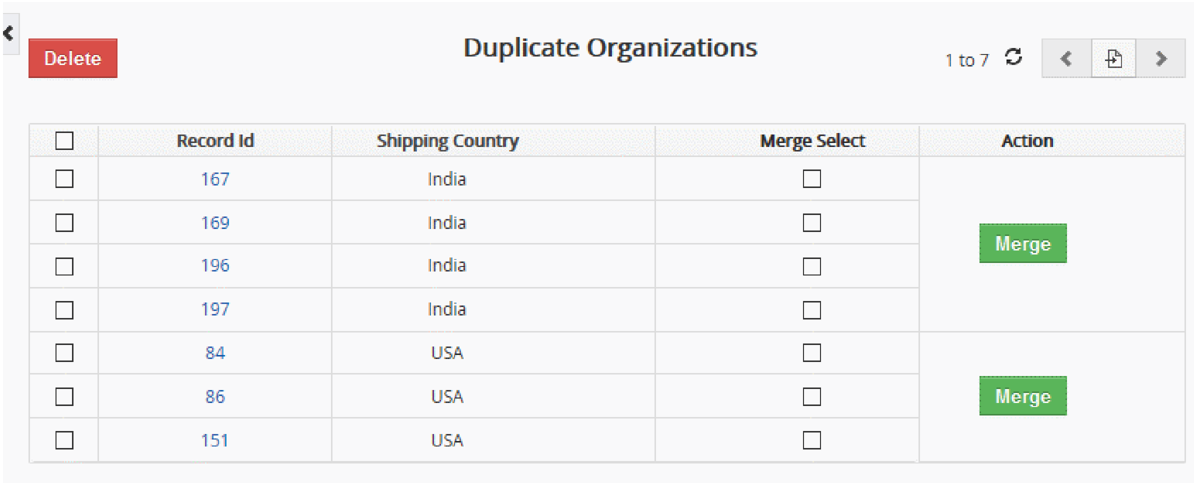
Allows you to locate and analyze duplicate records.

To find duplicate organization records:

- Click 'All' > 'Organization' (under 'Marketing and Sales') to open the 'Organization List' interface
- Click 'Actions' and choose 'Find Duplicates'



- Place your mouse cursor in the 'Available Fields' box to choose the fields that will be compared. Records which have identical values in these fields will be classed as duplicates.
- If you add multiple criteria then a record must match all criteria before it will be classed as a duplicate.
- Ignore empty values means the CRM will not use matching blank cells as an indicator of a duplicate.
- Click 'Find Duplicates'

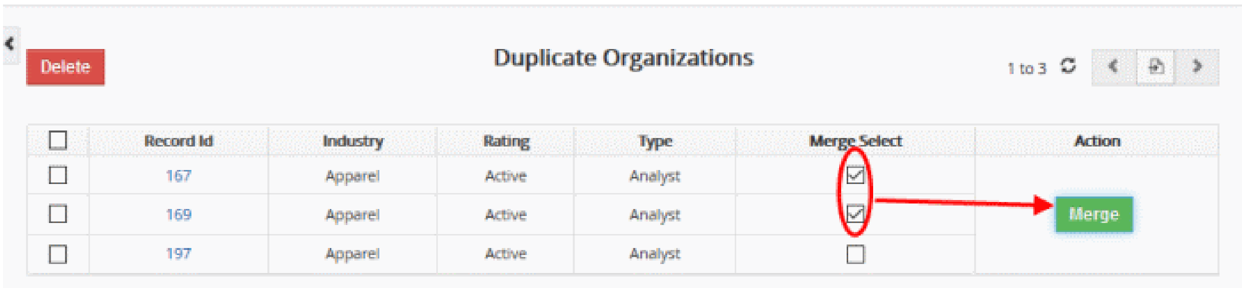


The 'Duplicate organizations' page is displayed.

- You can select the duplicate organization record and click the delete button on the top left of the 'Duplicate organization' page

OR

- Select required records and click 'Merge'



The 'Merge Records > Accounts' screen will be displayed.

Merge Records In > Accounts

The primary record will be retained after the merge. You can select the column to retain the values.
The other record will be deleted but the related information will be merged.

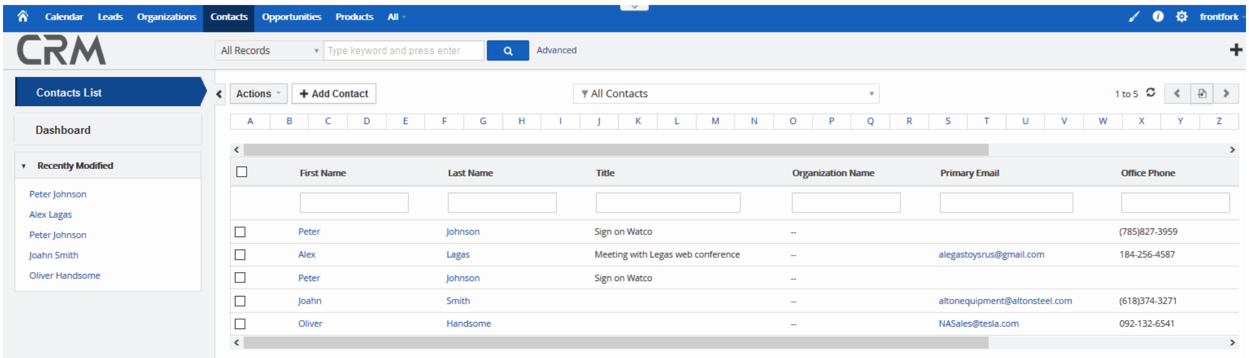
Fields	Record #1	Record #2
Organization Name	Trends Pvt Ltd	ABC Ltd
Website		
Primary Phone		
Ticker Symbol		
Fax		
Member Of	Kanchipuram silks	
Secondary Phone		
Employees	0	0
Primary Email		
Secondary Email		
Rating	Active	
Type	Analyst	Analyst
SIC Code		
Email Opt Out	No	No
Annual Revenue	0.00	0.00
Assigned To	Dagwood	Steam Ship
Notify Owner	No	No
Billing Address		
Shipping Address		
Billing PO Box		
Shipping PO Box		
Billing City		
Shipping City		
Billing State		
Shipping State		
Billing Postal Code		
Shipping Postal Code		
Billing Country		
Shipping Country	India	India
Description		

Merge

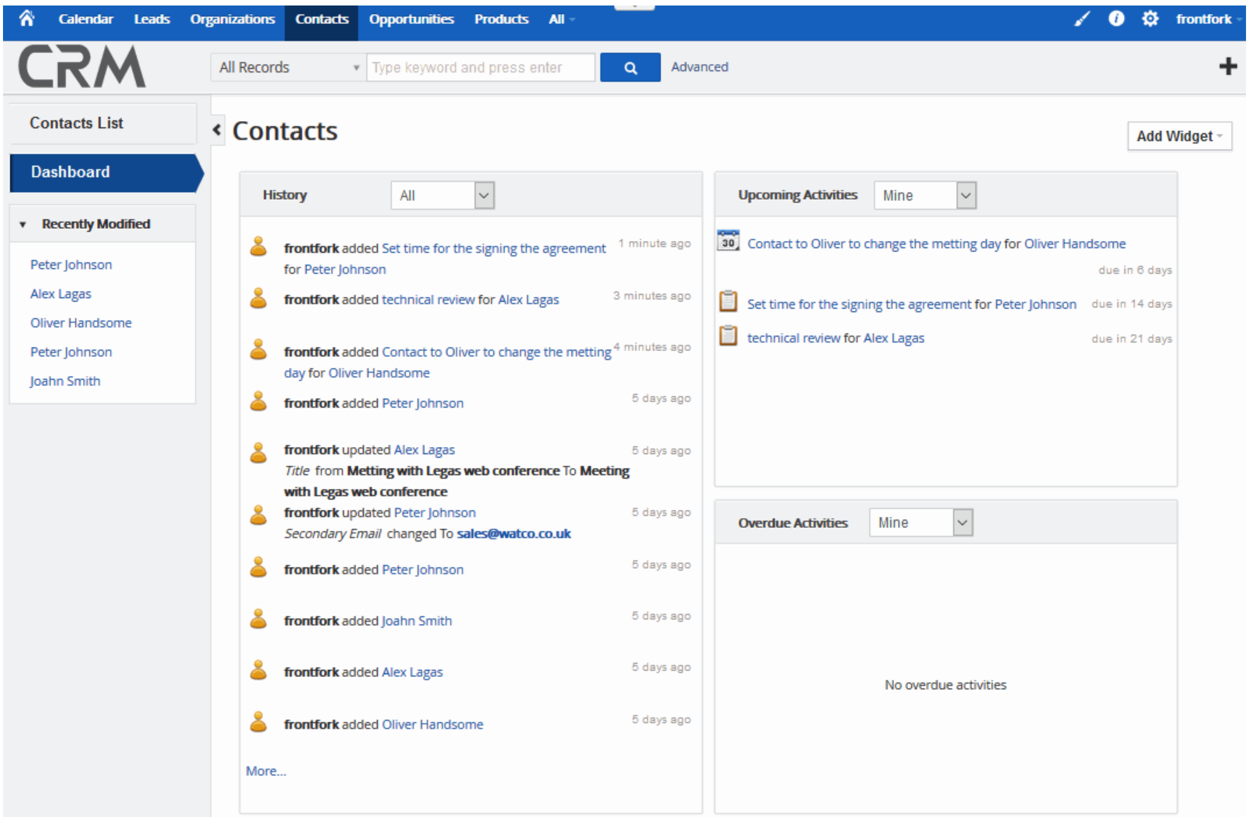
- Choose the field of record no.1 or 2 that you want to merge
- Click 'Merge'.

3.4. Contacts

A 'Contact' is any person with whom your company does or may do business. They could be acting individually or representing an 'Organization'.



- Click 'All' > 'Contacts' to view a list of all contacts added to the CRM.
- 'Recently Modified' shows contacts whose details have been updated recently.
- Click 'Dashboard' to see recent contact-related activities



- Click on any contact name in the main list to view their full details. Click 'Edit' if you wish to update or add information about the contact.

The following sections explain more about each area:

- **Add a new contact**
- **Import and Export Contact Records**
- **Track Contacts**
- **Associate Contacts with Other Records**
- **Mass Management of Contacts**

3.4.1. Add a New Contact

CRM allows you to create contact records based on the information you have about the individual.

There are four ways to create a new contact:

- **Create a new contact record -** Add a new contact from scratch.
  - Click 'Contacts' > 'Add Contact'

  See **Create a new Contact Record** and **Quick Create a Contact Record** if you need help.
- **Quick create a Record** - Create a new contacts record with the details you require. Other details can be added later as the business gains momentum. See '**Quick Create a Contact Record**' for details.
- **Clone a record** - Duplicate an existing record to use as a starting point for a new contact.
  - Click 'Contacts' > click the contact you wish to clone > 'More' > 'Duplicate'

  See **Clone an Contact Record** or more details.
- **Import Contacts** - Bulk import contacts from a .csv or .vcf file
  - Click 'Contacts' > 'Actions' > 'Import'

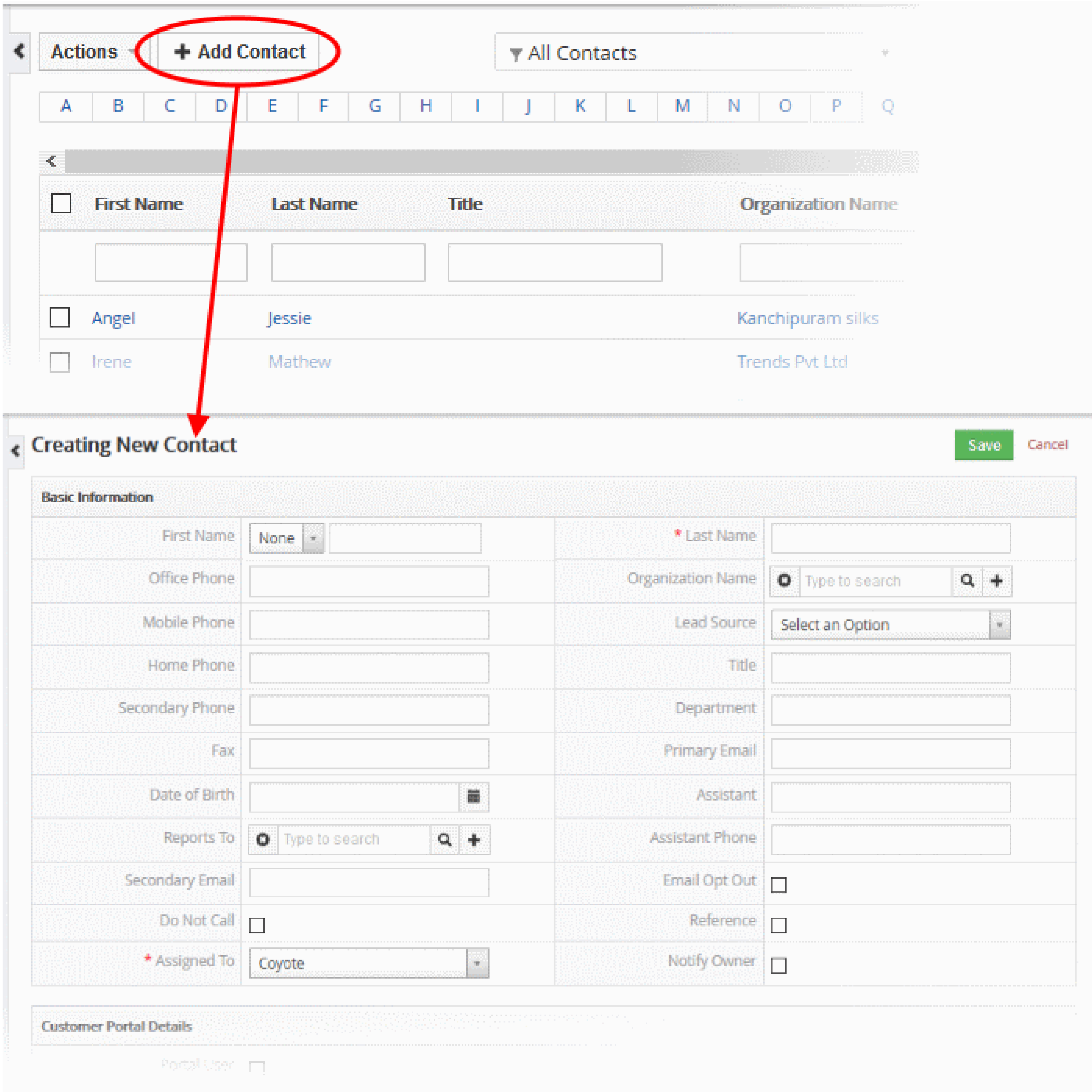
  See **Import and Export Records** if you need further help.

Once a contact has been added to the 'Contacts List', you can:

- Associate the contact with organizations, leads, opportunities, invoices, products, campaigns and more. See **Associate Records from Other Modules to a contact** for more details.
- Add activities for the contact (scheduled events, meetings and more). See **Track Contacts** for more details.
- Track sale and purchase orders depending on whether the contact is a seller or a buyer. You can view and manage associated emails, quotes, sales orders, purchase orders, invoices, campaigns, vendors, assets, invoices , products, services and opportunities. See **Track Contacts** for more details.

Create a New Contact Record

- Click 'All' then 'Contacts' (under 'Marketing and Sales') OR click 'Contacts' on the title bar
- Click the 'Add Contacts' button
- The 'Create New Contacts' page will open. Complete as many details as you have to hand then click 'Save'.



Create New Contact - Form Parameters	
Form Parameter	**Description**
Contact Details	
First Name	First name of the contact
Last Name	Last name of the contact
Office Phone	Employee's contact number
Organization Name	Associate the contact with a CRM organization.
Mobile Phone	Cell phone number of the contact
Lead Source	Select how the contact was discovered
Home Phone	Home phone number of the contact
Title	Contacts job title

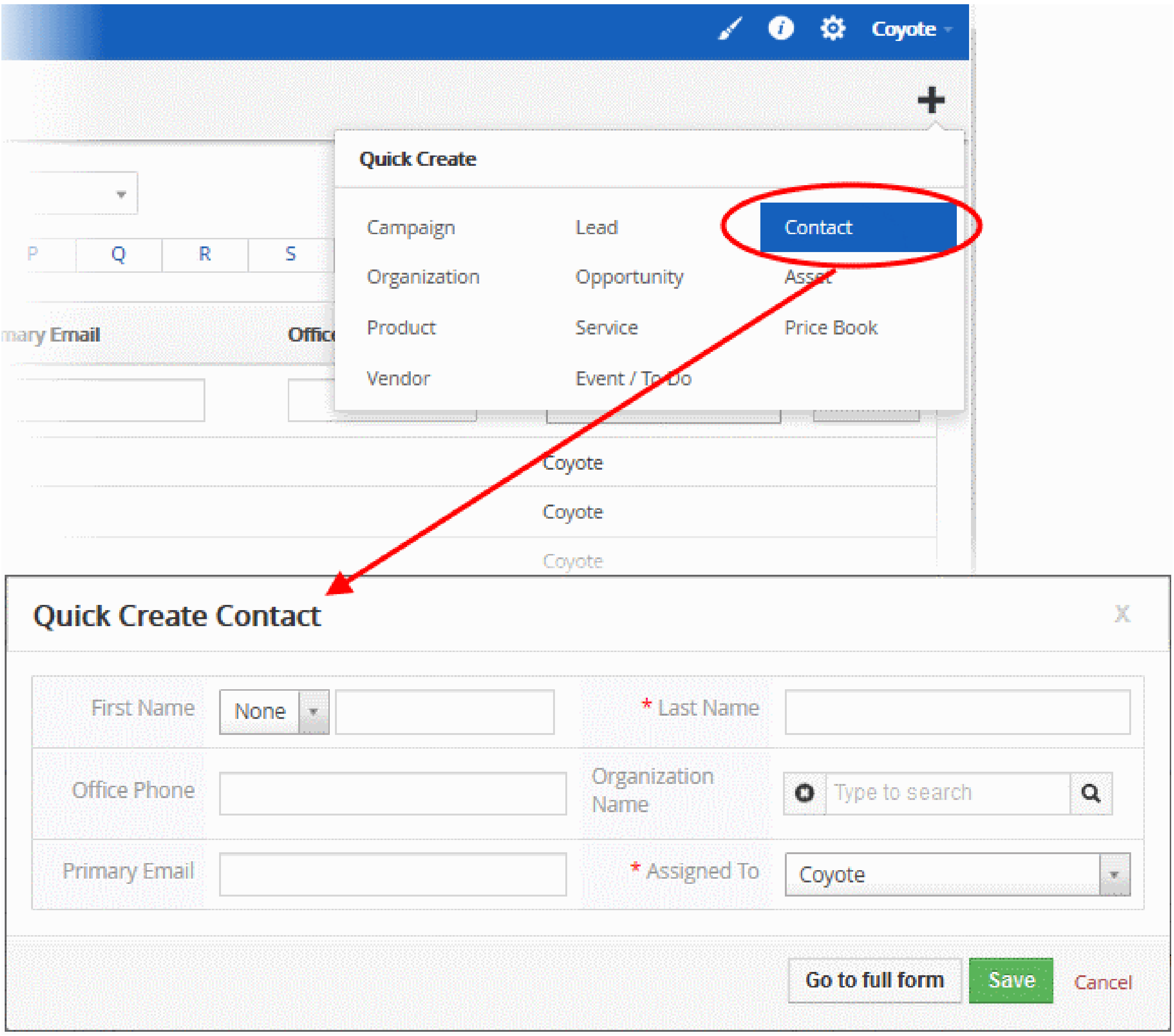
Secondary Phone	Enter any secondary email address for the lead
Department	Specify the department of the contact
Fax	Enter the Fax number of the organization
Primary Email	Enter the mail email address of the organization
Date of Birth	Provide date of birth of the contact
Assistant	Specify the name of the contact's assistant
Assistant Phone	Specify the phone number of the contact's assistant.
Reports to	Select from the list of contacts to whom the contact reports.
Secondary Email	Enter any secondary email address for the organization
Email Opt Out	Specify whether the lead has opted out of email communications.
Do Not Call	Specify whether the contact has opted out of call communications
Assigned To	Enter the name of the staff member to whom the lead is assigned
Notify Owner	Specify whether to notify the staff member to whom the organization record is assigned.
Reference	Specify whether to organize reference contacts to other modules in CRM
Customer Portal Details	
Portal User	If enabled, the contact record is granted customer portal access
Support Start Date	The customer can log in to customer portal from this date
Support End Date	The customer can log in to customer portal until this date
Address Details	
Mailing Street	Enter the address details like street name, city, country, postal code and more
Other Address	Enter the destination address details for other purposes
Mailing PO Box	Enter the PO Box number for mailing purpose
Other PO Box	Enter the PO Box number for other purpose
Mailing City	Enter the name of city meant for mailing purposes
Other City	Enter the name of destination city for other purposes
Mailing State	Enter the name of state meant for mailing purposes
Other State	Enter the name of destination state for other purposes
Mailing Zip	Enter the mailing zip code details
Other Zip	Enter the other zip code details
Mailing Country	Enter the name of country for mailing purposes
Other Country	Enter the name of destination country for other purposes

Click 'Save' to add the contact to the 'Contact List'. You can update the contacts details at any time by clicking the 'Edit' button.

Quick Create a Record

The 'Quick Create' option you to create a contact record from any interface, in a short time. You need to enter only the basic details.

- Click the '+' button at the top right from any interface of CRM and choose 'Contacts' from the options.



- Fill-in the organization details in the 'Quick Create Contact' dialog. Descriptions of the form parameters are available in the **this table**.
- If you want to view and enter all details, click 'Go to the full form'
- Click 'Save'

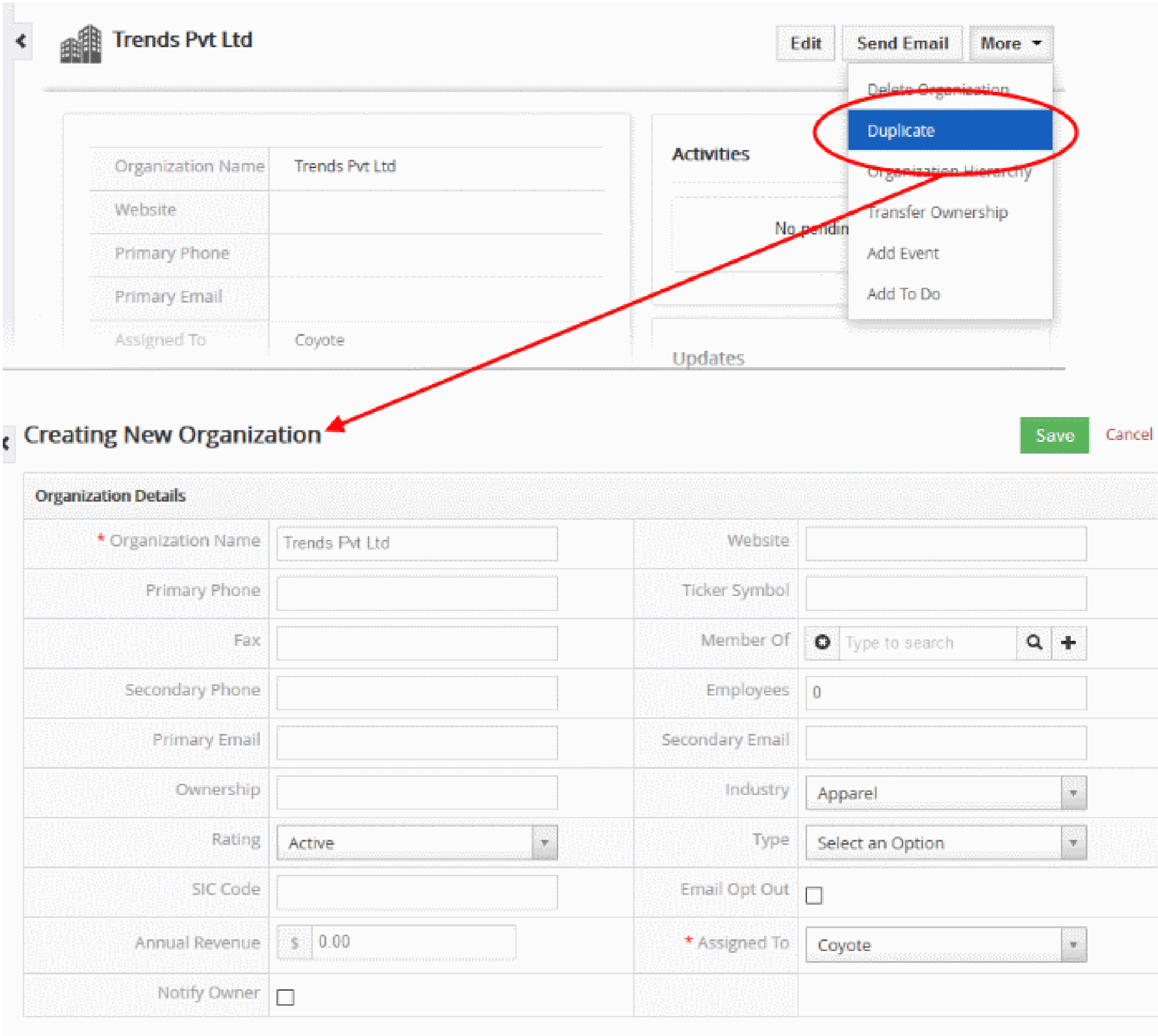
The record will be saved and added to the list of contacts records in the 'Contacts' interface. You can open the summary interface for the record by clicking the contact name and add/edit the details as required at anytime.

Clone a Contact Record

CRM allows you to create a new contact record using an existing record as a template. You can then edit the cloned record according to the requirements of your new contact. This is useful when you find a contact that has the same organization for which address details exists already.

To clone a contact record

- Click 'All' on the title bar and choose 'Contact' under 'Marketing and Sales' to open the 'Contact List' interface
- Click on the name of the contact record you want to clone to open the the 'Contact Details' interface
- Click 'More' on the top right and choose 'Duplicate'



The 'Creating New Organization' form will open with the details populated from the original record.

- Enter a new name for the new organization
- Edit the details as required. Descriptions of the form parameters are available in the **table above**.
- Click 'Save'.

The organization record will be saved and added to the list of organization records in the 'Organization List' interface.

3.4.2. Manage Contacts

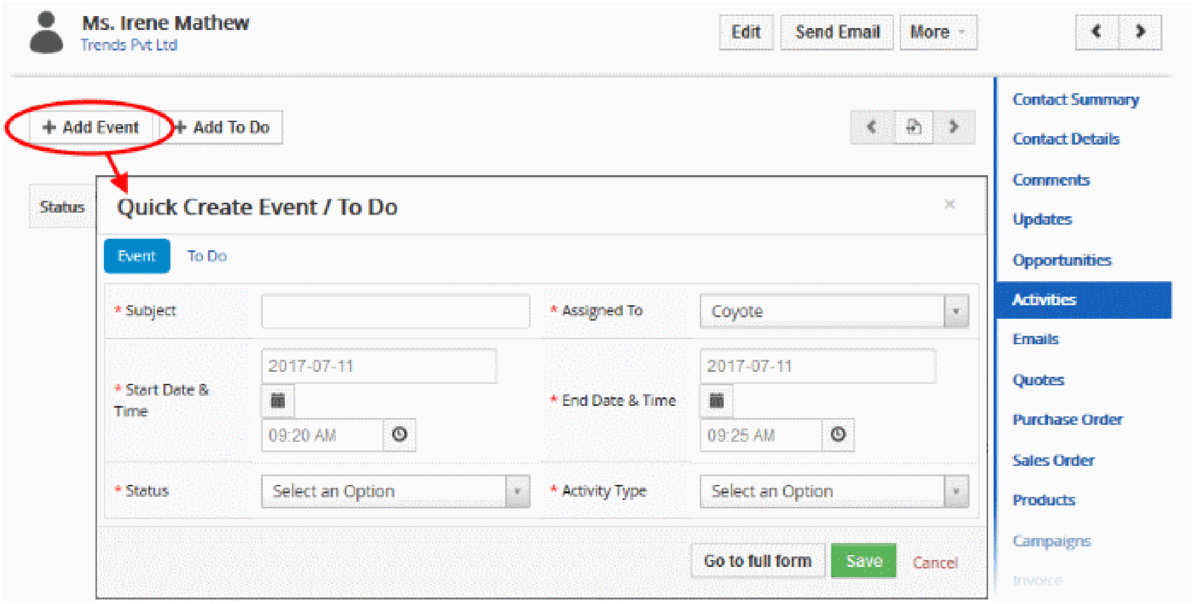
- You can **schedule activities** for any contact that has been added to the CRM. Contact activities will be shown in the calendars of team members assigned to the activity. Other team members may view the activity details from the shared calendar.
- You can also **view and manage** associated emails, quotes, sales orders, purchase orders, invoices, campaigns, vendors, assets, invoices , products, services and opportunities.

Activities

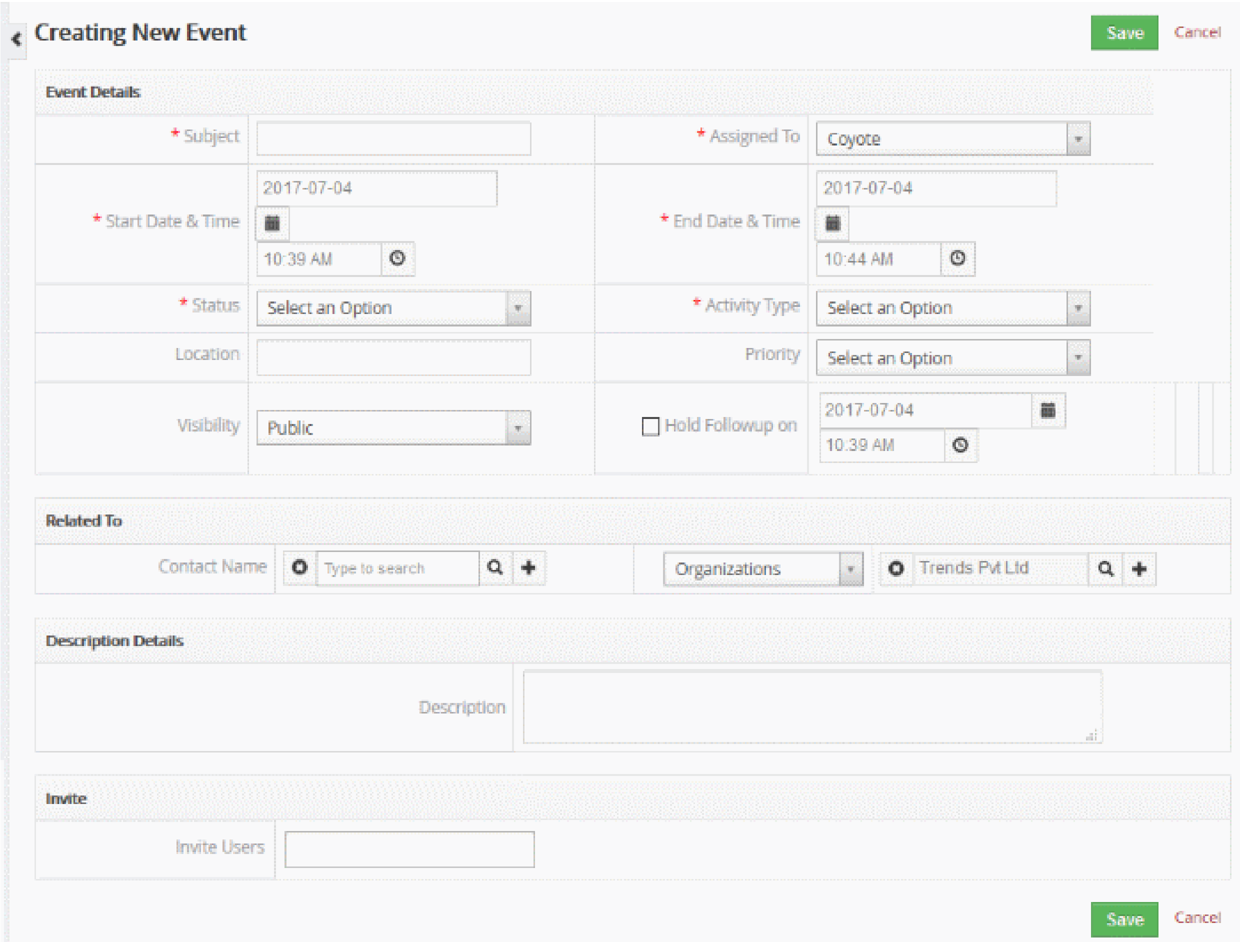
Activities consist of 'Events' (meetings, calls, webinars etc) and 'To Dos' (product delivery, purchase etc).You can add an 'Event' or 'To Do' as a contact activity as follows:

To create an Event/To Do:

- Click 'All' > 'Contacts' (under 'Marketing and Sales') to open the 'Contact List' interface
- Click on the contact for whom you want to add an activity.
- In the contact details page, click 'Activities' on the right-hand menu
- Click either the 'Add Event' or 'Add To Do' button. You can also switch between types while in the event creation dialog:



- **Event** - Create a scheduled activity that has a fixed start and end time. You need to pick an activity type (meeting, call etc), specify the start & end times of the event and assign the event to a staff member. You should also create a subject (or name) for the activity and specify its current status (planned, held, not held).
- **To do** - A 'to do' is a general task with a due date for the contact. For example, 'Follow up call', 'Send Quote', 'Deliver Purchased Items' etc.
- Please note that the 'Activity Type' option is only available for quick events.
- The information in the quick event dialog will be used to populate the calendar entry. Click 'Go to Full Form' if you want to create a detailed event with more information (priority, visibility etc).



- Click 'Save' to register your event or to-do.

See the section **Manage Shared Calendar** for more details on the 'Event/To Do' full form.

Tracking

- Click 'All' > 'Contacts' then click on a contact's name to open their details page.
- The links on the right show record types that can be associated with the contact. These include organizations, leads, opportunities, invoices, products, campaigns, purchase orders,and more.
- Click any of these links to view items that have already been associated with the contact.
  - To add a new item, click the 'Add' button within any of the record types.
- See **Associate Records from Other Modules to a contact** for more help to associate other records with contacts.

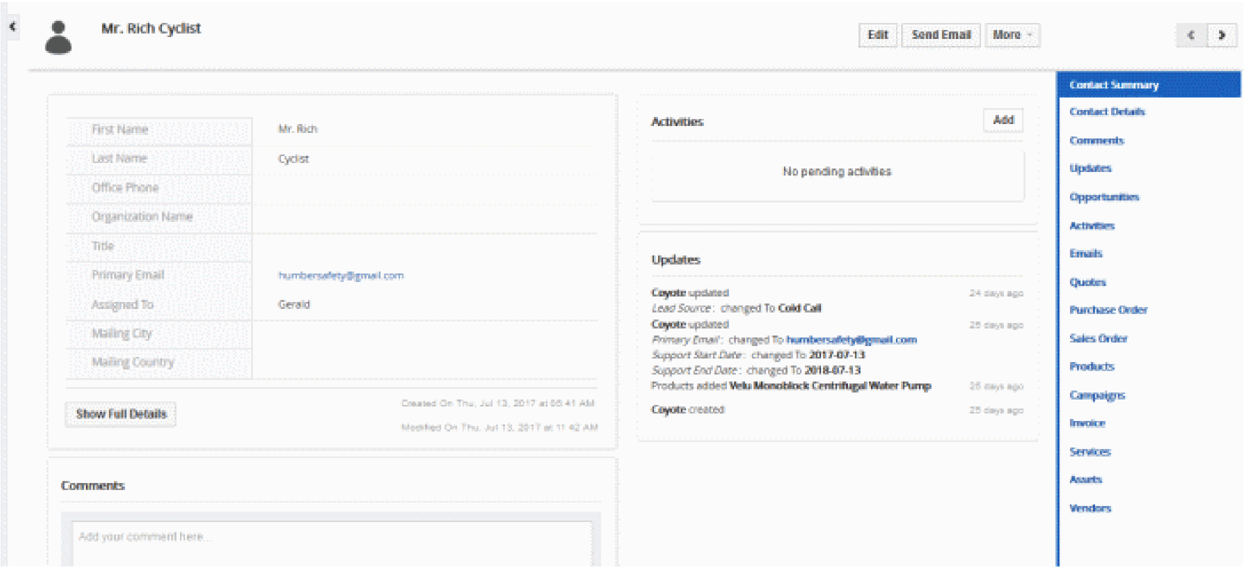
3.4.3. Associate Records from Other Modules to a Contact

The 'Contacts Summary' interface lets you associate various records with a contact. Records you can associate include opportunities, campaigns, invoices, purchase orders, quotes and more. Contacts that are members of a single organization will be listed in the organization record on viewing its associated contacts.

To view and manage the records of modules associated with a contact record

- Click 'All' > 'Contact' to open the 'Contact List' interface
- Click on any contact to open the 'Contact Summary' page
- Click the 'Contact Details' link on the right to see even more information

The right-hand menu contains links to the records of other modules which are associated with the contact:

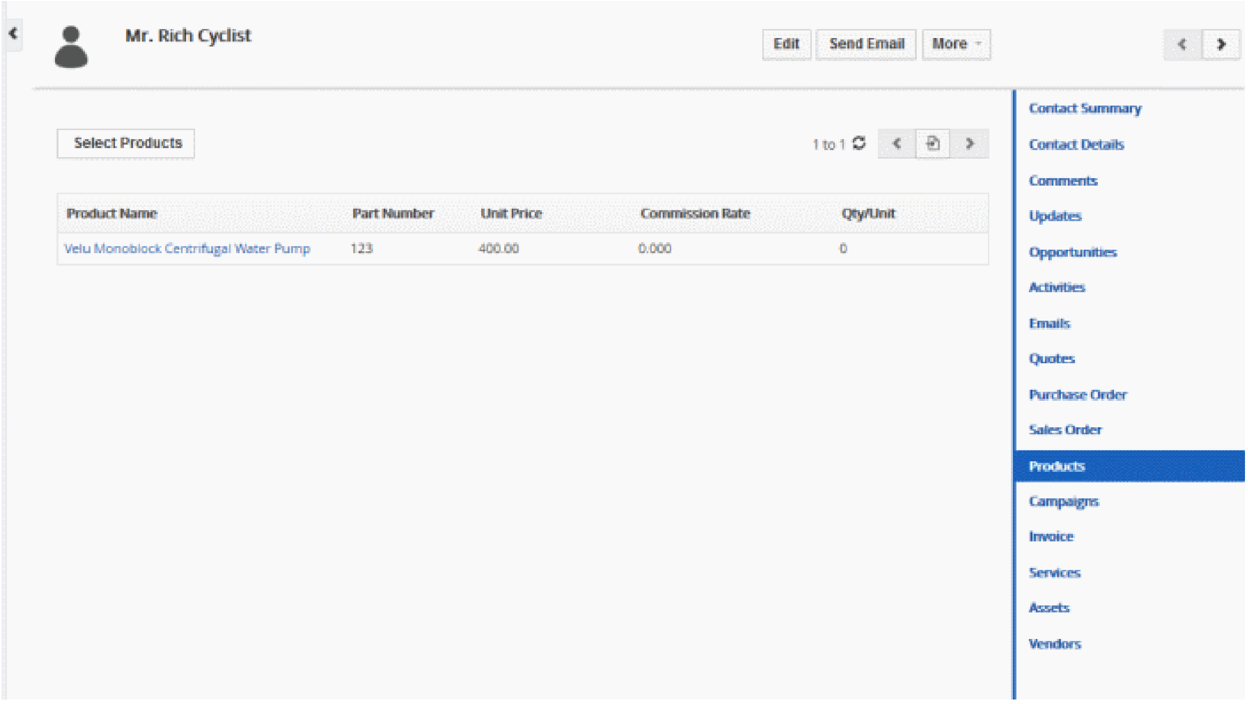


Click these links to create records in other modules which will be linked to the contact.

- Opportunities - View and edit existing opportunities associated with the contact. Associate a new opportunity with the record.
- Activities - View and edit existing activities associated with the contact. Add new events and 'To-Do's.
- Emails - View, create and send emails to the contact
- Quotes - View and edit existing quotes associated with the contact. Create new quotes for the contact.
- Purchase Order - View and edit existing purchase orders associated with the contact. Create a new purchase order for the contact. The details of the contact will be automatically populated
- Sales Order - View and edit existing sales orders associated with the contact. Create a new sales order for the contact. The details of the contact will be automatically populated
- Products - View and edit existing products associated with the contact. Associate a new product with the contact.
- Campaigns - View campaigns associated with the contact. Select new campaigns to associate with the product.
- Invoice - View and edit existing invoices associated with the contact. Add a new invoice for the contact. The details of the contact will be automatically populated
- Services - View and edit existing services associated with the contact. Select new products to associate with the contact.
- Assets - View and edit existing invoices associated with the contact. Add a new assets for the contact.
- Vendors - View and edit existing vendors associated with the contact. Add a new vendor for the contact

The example below describes how to manage the 'Product' records associated with a contact.

- Open a contact as described earlier then click 'Products' in the menu on the right



- This will open a list of products (product records) that are already associated with the contact

From here you can:

- **Associate new product records to the contact**
- **Manage selected products**

CRM also allows you to send emails to selected persons from anywhere in the interface. See **Emails** to know more about sending emails to contacts.

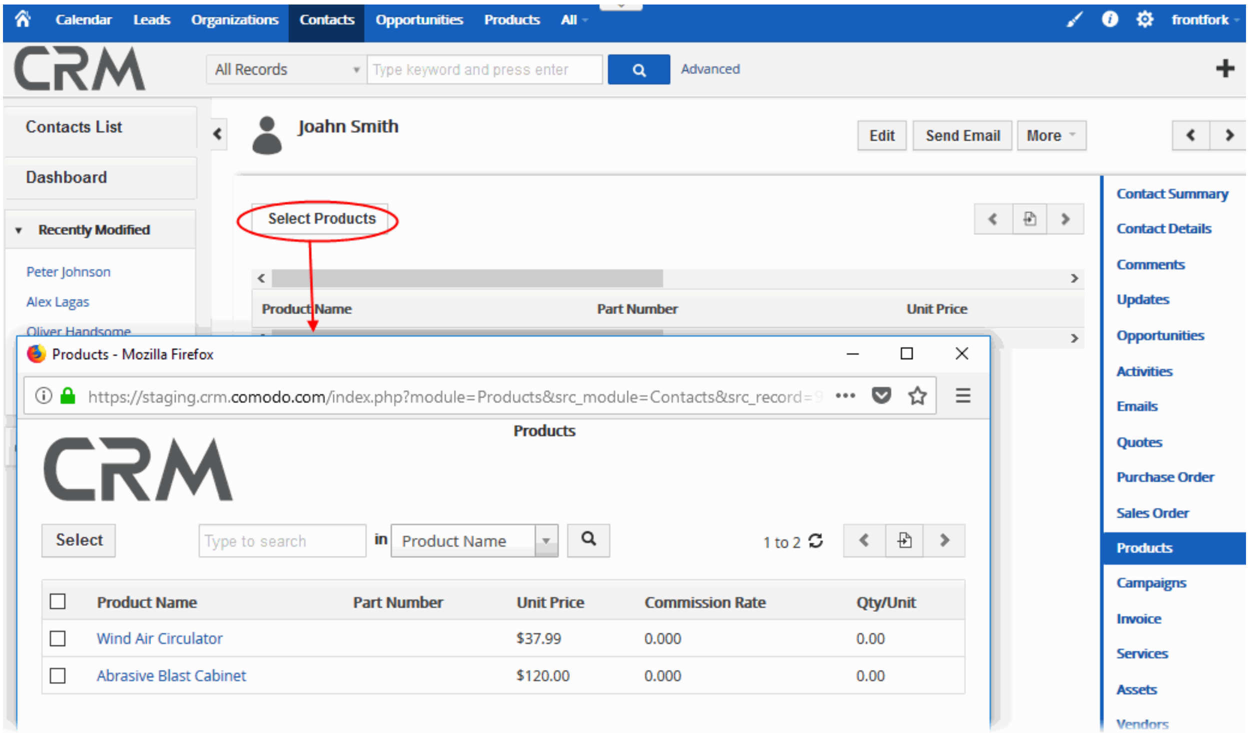
Associating Product Records to the Contact

You can associate product records to the contact in two ways:

- **Manually select products from records existing in CRM**
- **Add a new product and associate with the contact**

To manually associate product records

- Click 'Select Products'



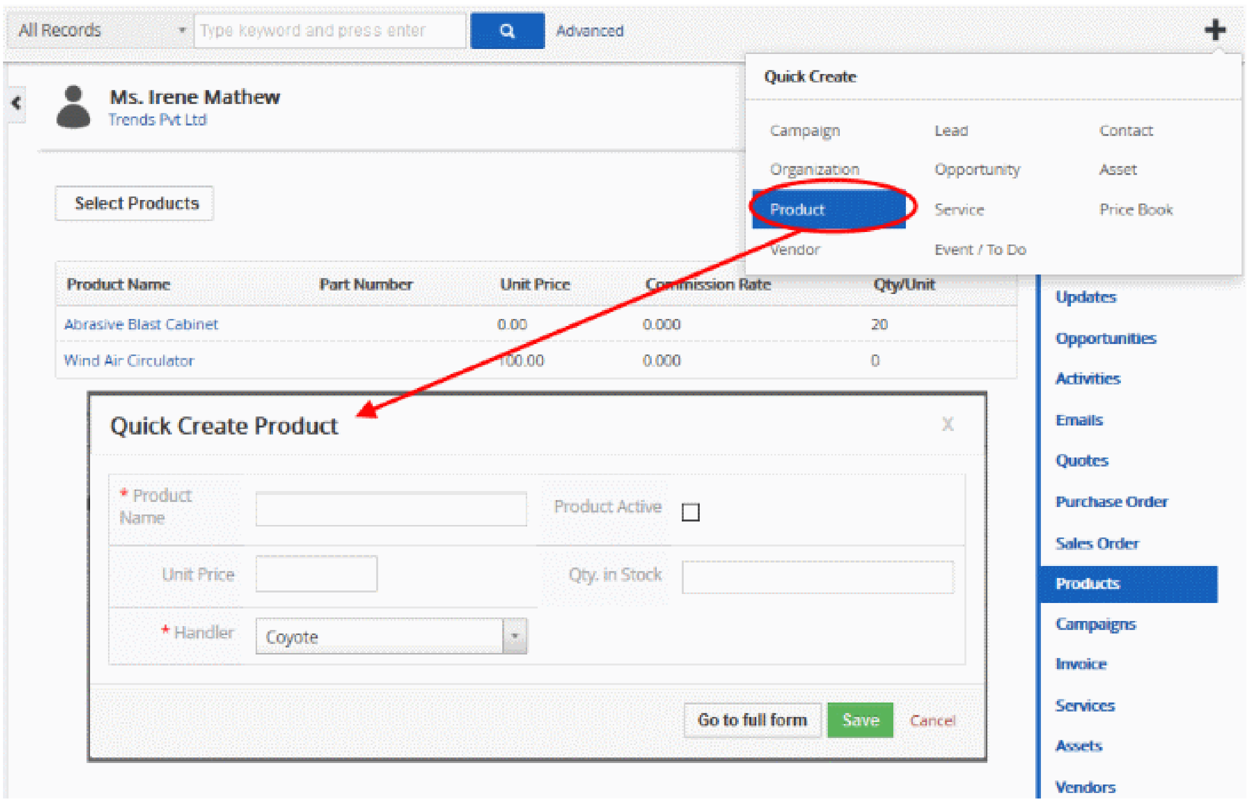
A list of available product records will be displayed.

- Choose the product(s) you want to associate with the contact and click the 'Select' button (top left)

The product will be added to the list of associated records.

To Add a New Product

- Click the '+' symbol on the top right corner of the 'Product' interface.'
- Click 'Product' from the drop down.



The 'Quick Create Product' dialog will appear.

- Complete the details of the new product and click 'Save'.

The information in the 'Quick Create Product' dialog is basic in nature. Use the 'full form' if you want to enter more details for the product.

Manage Associated Product

You can view, edit and add products which are associated with a contact by clicking the 'Products' link on the right:

- Click 'Contacts' then click the name of an individual contact
- Click 'Products' in the menu on the right
- Click 'Select Products' to associate a new product with the contact.
- Mouse over an existing product record to view options at the far right end of the row:

- View product details. See **Products** for more details.

- Edit product details. See **Products** for more details.

- Removes the product's association with the contact.

The information above also applies to the other module types listed in the right-hand menu.

3.4.4. Mass Management of Contacts

CRM allows you manage and update common details for multiple contacts at the same time. You can edit, delete, add comments, send emails and transfer ownership. For example, contacts who belong to different organizations and have different activities can all be assigned to the same staff member.

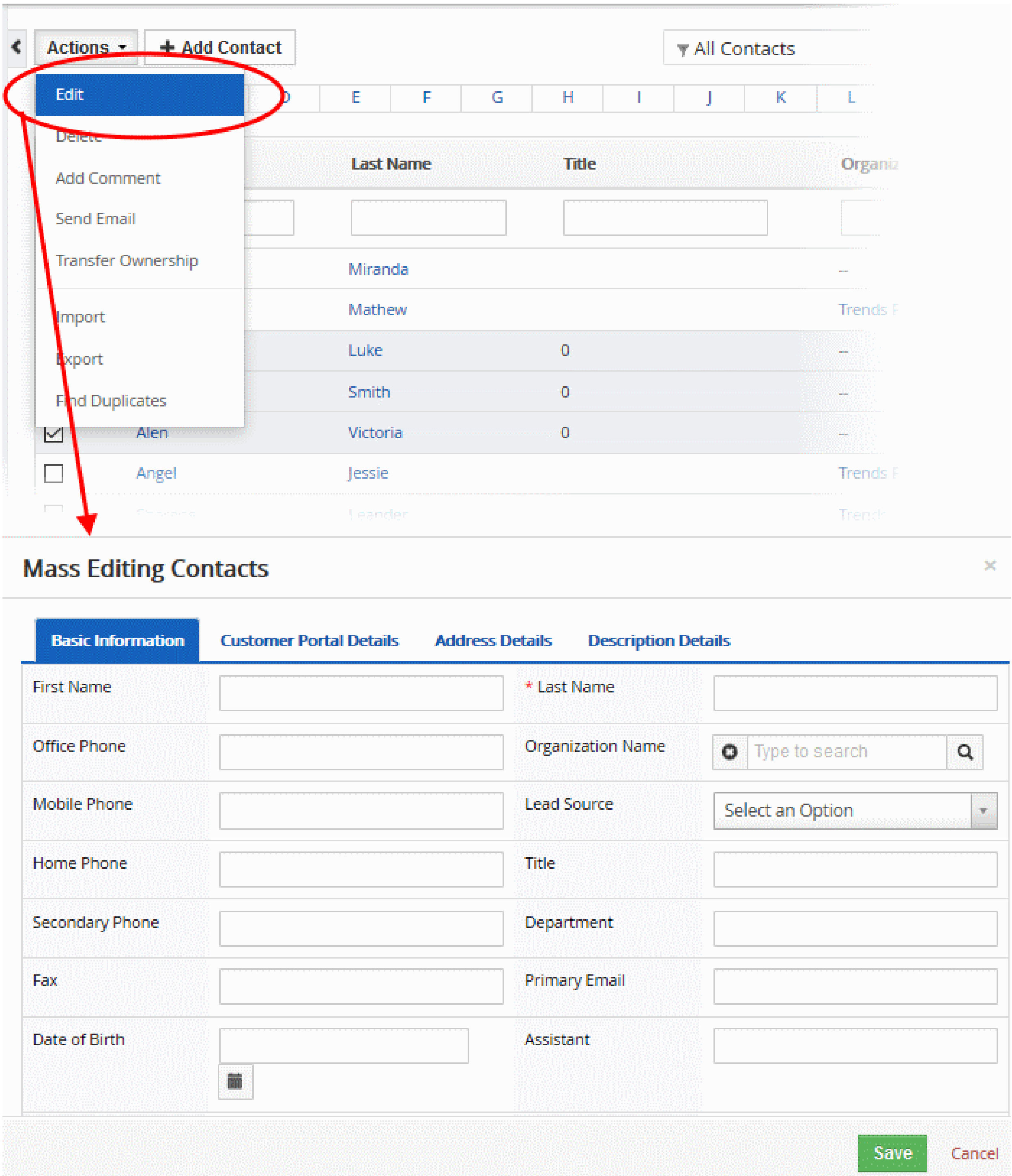
The interface allows you to:

- **Edit contact records**
- **Delete contact records**
- **Add comments**
- **Send Email**
- **Transfer Ownership**
- **Import / Export contact records**
- **Find Duplicate contacts**

To edit common details of several contacts

- Click 'All' > 'Contacts' (under 'Marketing and Sales') to open the 'Contacts List' interface
- Select the contacts to be edited
- Click 'Actions' and choose 'Edit'

The 'Mass Editing Contacts' pop-up will appear



It contains four tabs:

- **Basic Information** -The 'Basic Information' tab allows you to create or edit values which will be common to all selected contacts. For example, you may want to set the primary email address or fax number to the same value because all selected contacts belong to the same organization.

  You can also assign the contacts to another staff member and specify common 'email opt-out' and 'do not call' settings.

- **Customer Portal Details** - Set the dates that the contacts are allowed to login to the customer portal.

- **Address Details** - Specify common mailing and secondary addresses for all selected contacts.

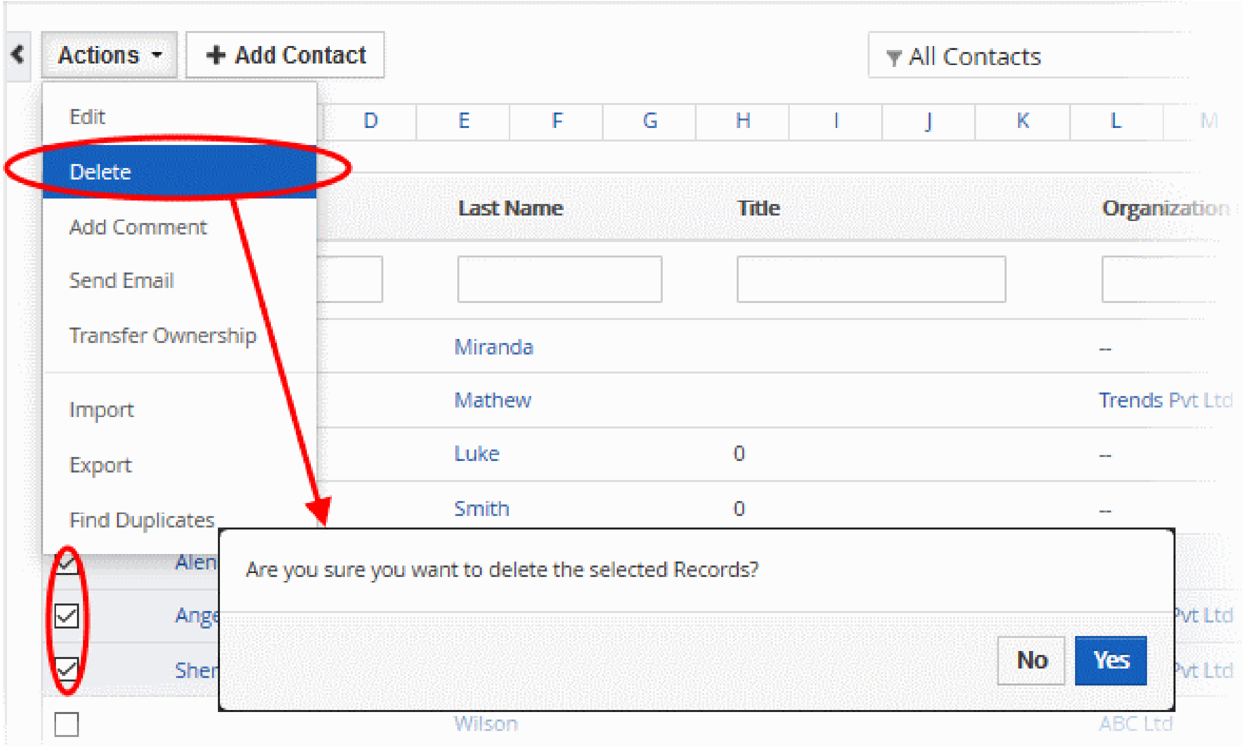
- **Description Details** - Create a common description for all contacts. For example, 'Decision makers'.

Delete Contact Records

Contact records that are no longer required can be removed.

To remove contacts records:

- Click 'All' > 'Contacts' (under 'Marketing and Sales') to open the 'Contacts List' interface
- Select the Contact(s) to be deleted
- Click 'Actions' and choose 'Delete' button.



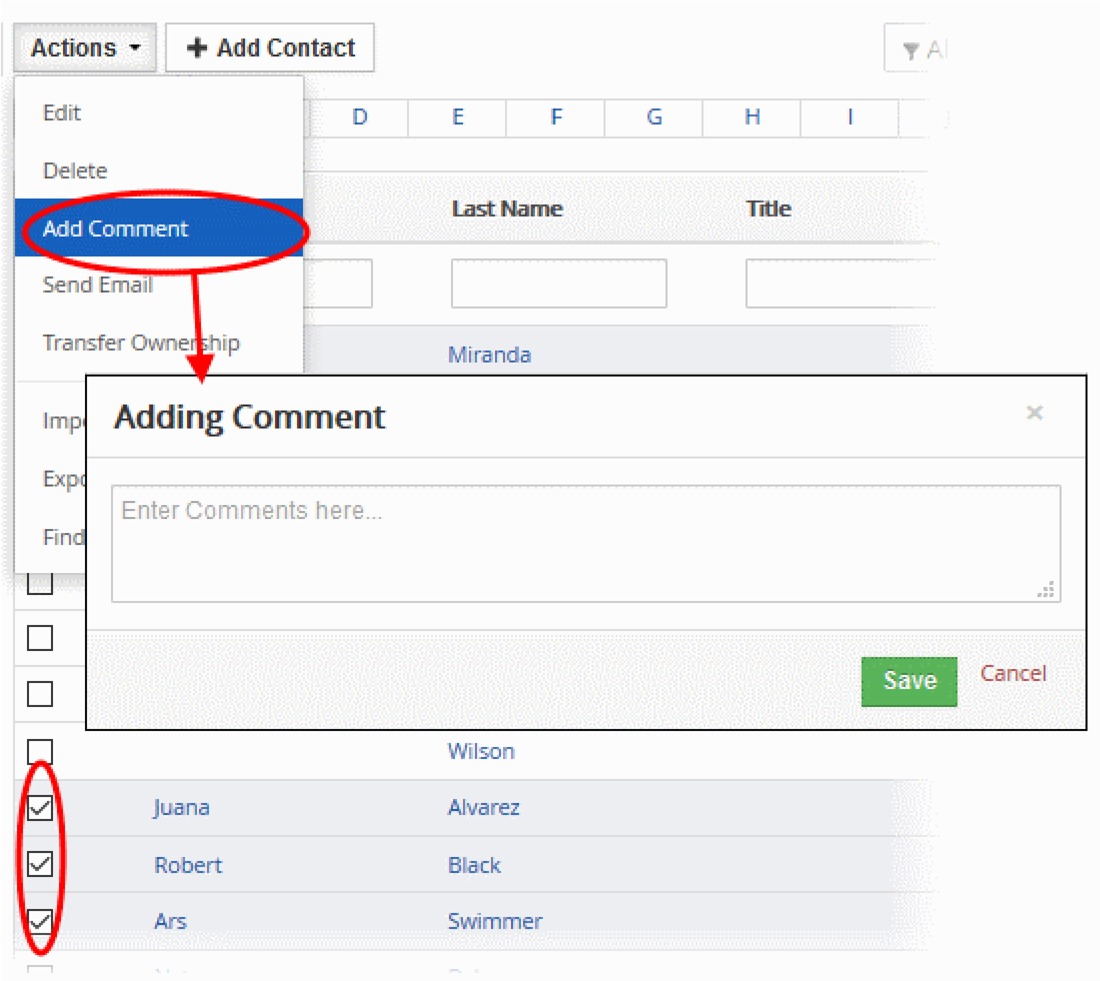
- Confirm the deletion by clicking 'Yes'

Add Comments to Contacts Records

You can enter a comment that needs to be updated for more than one contact record

To do this:

- Click 'All' > 'Contacts' (under 'Marketing and Sales') to open the 'Contacts List' interface
- Select the Contact(s) to which you need to add comment.
- Click 'Add Comment' and type your message



- Click 'Save'

Send Email

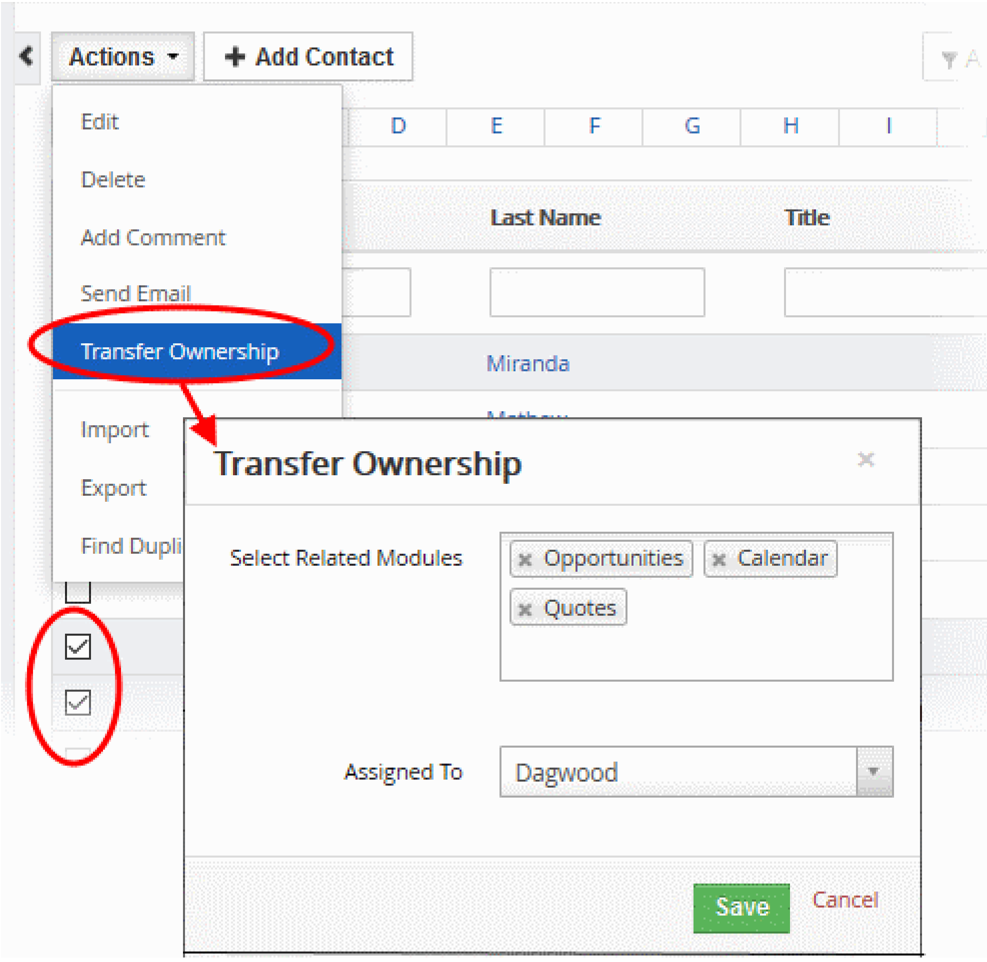
You can send mails to multiple contacts at once. See **Emails** to know more.

Transfer Ownership

You can transfer ownership of multiple contact records to another staff member

To do this:

- Click 'All' > 'Contacts' (under 'Marketing and Sales') to open the 'Contacts List' interface
- Select the Contact(s) for which you need to transfer the owner
- Click 'Actions' > 'Transfer Ownership'



The 'Transfer Ownership' dialog will be displayed. You can transfer all information to the new assignee, or only selected modules that are associated to the contact.

- Choose the modules from 'Select Related Modules drop down and then the staff members from the 'Assigned To' drop down menu.
- Click 'Save'

Import / Export Contact Records

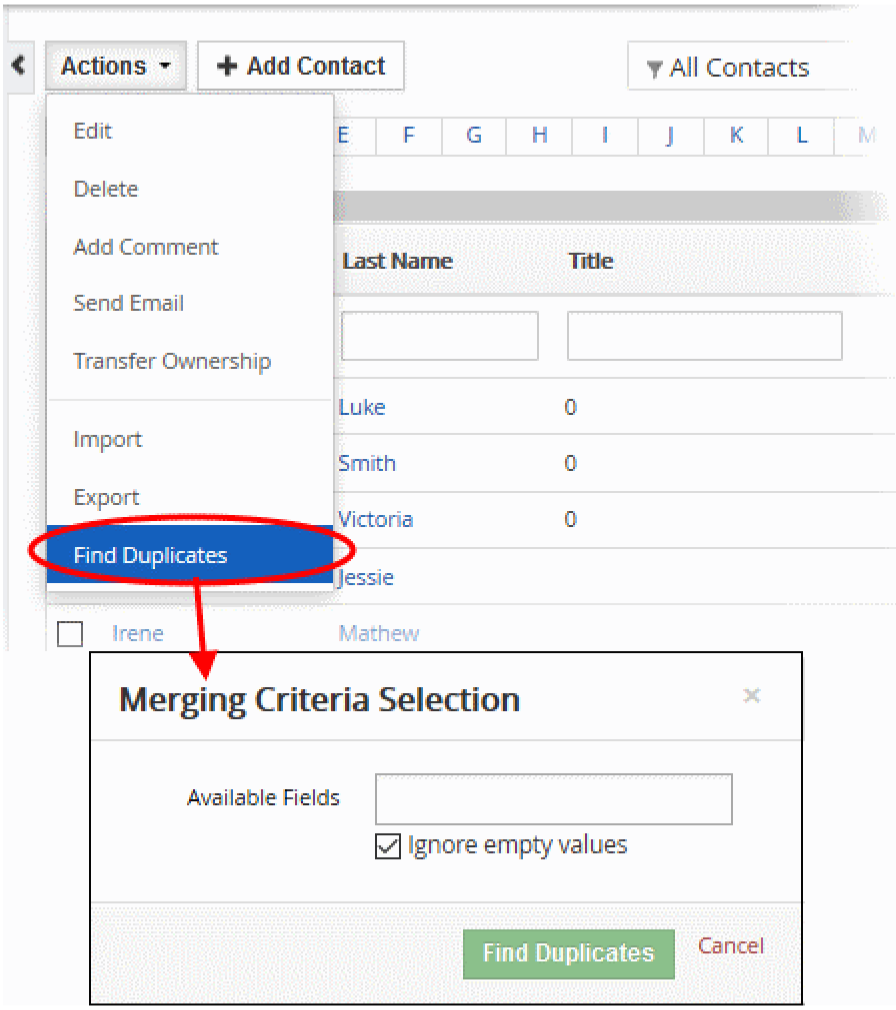
You can import saved records and export opportunities records from this interface. See '**Import and Export Records**' for more information.

Find Duplicates

Allows you to locate and analyze duplicate records.

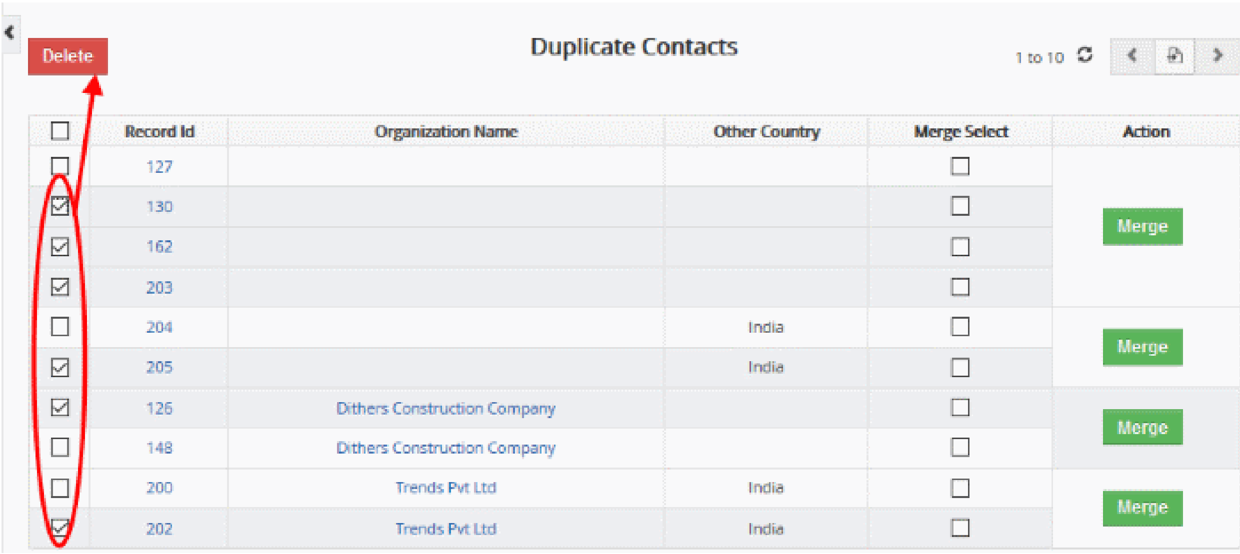
To find duplicate contact records:

- Click 'All' > 'Contacts' (under 'Marketing and Sales') to open the 'Contact List' interface
- Click 'Actions' and choose 'Find Duplicates'



- Place your mouse cursor in the 'Available Fields' box to select the fields that will be compared. Contacts which have identical values in these fields will be classed as duplicates.
- If you add multiple criteria then a record must match all criteria before it will be classed as a duplicate.
- Ignore empty values means the CRM will not use matching blank cells as an indicator of a duplicate.
- Click 'Find Duplicates'. Duplicates will be shown as follows:

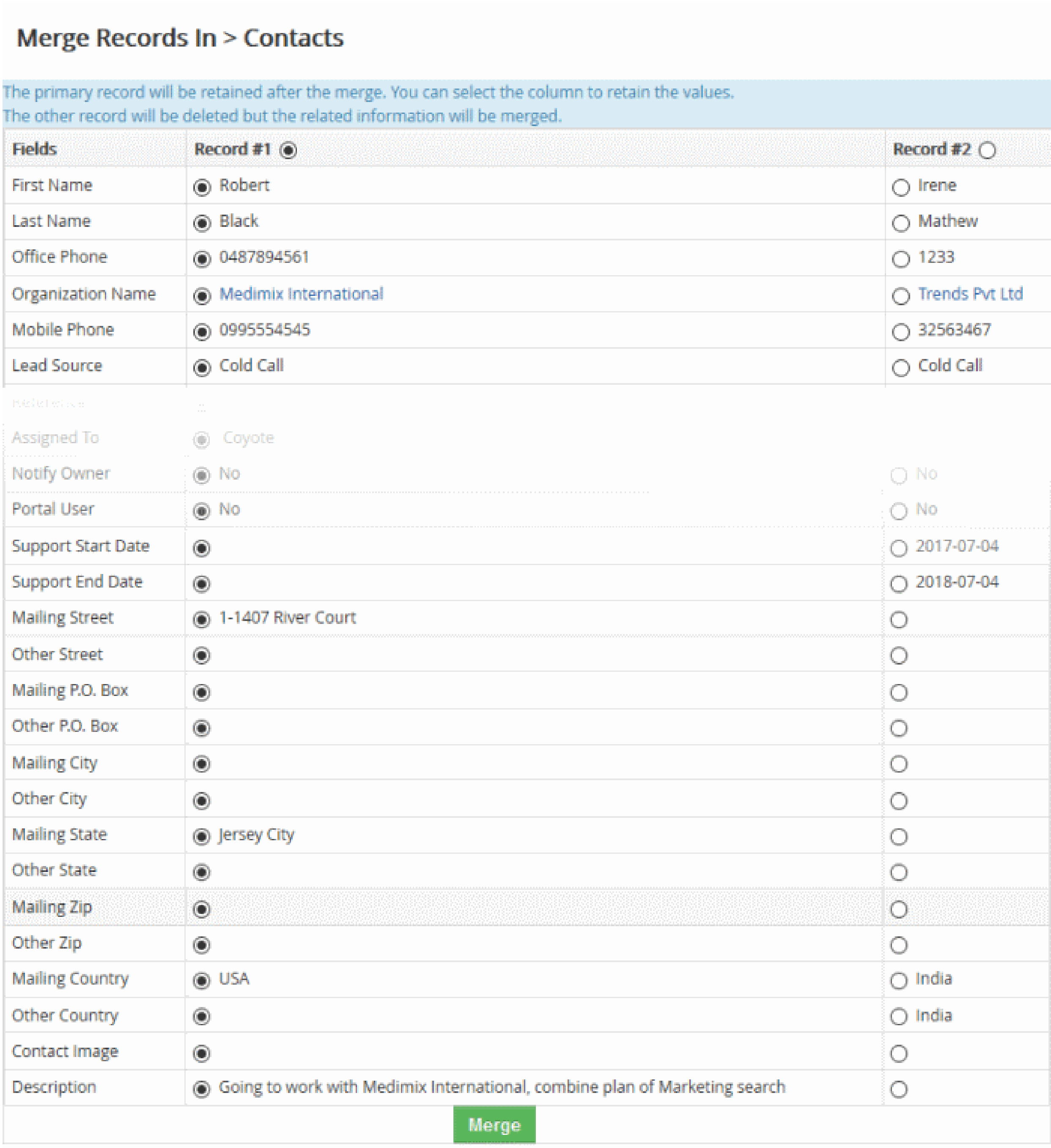
- You can delete, merge or take no action on the duplicates:



OR

- Select required the records and click 'Merge'

The 'Merge Records > Contacts' screen will be displayed



Merge Records In > Contacts

The primary record will be retained after the merge. You can select the column to retain the values.
The other record will be deleted but the related information will be merged.

Fields	Record #1	Record #2
First Name	Robert	Irene
Last Name	Black	Mathew
Office Phone	0487894561	1233
Organization Name	Medimix International	Trends Pvt Ltd
Mobile Phone	0995554545	32563467
Lead Source	Cold Call	Cold Call
[illegible]		
Assigned To	Coyote	
Notify Owner	No	No
Portal User	No	No
Support Start Date		2017-07-04
Support End Date		2018-07-04
Mailing Street	1-1407 River Court	
Other Street		
Mailing P.O. Box		
Other P.O. Box		
Mailing City		
Other City		
Mailing State	Jersey City	
Other State		
Mailing Zip		
Other Zip		
Mailing Country	USA	India
Other Country		India
Contact Image		
Description	Going to work with Medimix International, combine plan of Marketing search	

Merge

- Choose the field of record no.1 or 2 that you want to merge
- Click 'Merge'.

3.5. Opportunities

Leads which have developed into a potential sale for your company should be converted to an 'Opportunity'. The opportunities interface allows sales managers to:

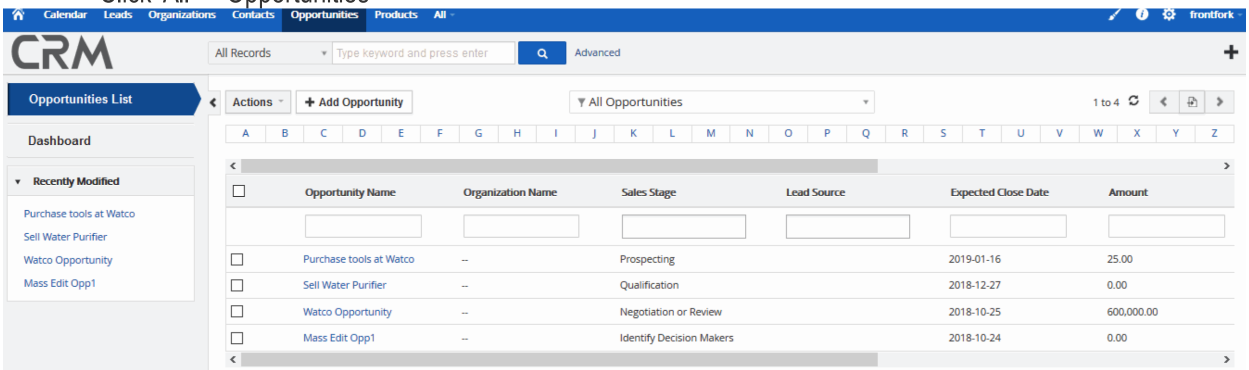
- Devise a strategy to follow up prospective customers who are most likely to successfully complete a sale
- Gain clear visibility of the sales initiatives which are most likely to convert
- Add potential sales to the sales pipeline
- Keep track of the sales process from beginning to end
- Keep track of the success of marketing efforts by tracking sales back to the original lead source and source

campaign

- Review reasons for opportunities lost

To open the 'Opportunities' interface:

- Click the 'Opportunities' button on the top navigation
  OR
- Click 'All' > 'Opportunities'



Left-hand menu:

- 'Opportunities List' shows all opportunities added to the CRM. Click any opportunity to open its details page.
- 'Dashboard' shows key information about ongoing opportunities
- The 'Recently Modified' tab lists opportunities which were recently updated.

Opportunities - Column Descriptions	
Column Header	**Description**
Opportunity Name	The name of the opportunity
Organization Name	The name of the organization to which the opportunity belongs
Sales Stage	Where the opportunity currently lies in the sales funnel
Lead Source	The name of the lead
Expected Close Date	Date on which the sale is expected to be completed
Amount	The estimated dollar value of the opportunity.
Assigned To	The name of the staff member to whom the opportunity is assigned
Contact Name	The name of the contact person in the customer organization

- Click any column header to sort the table according to the items in the column.
- To search for a specific item, enter the search criteria in the respective column header(s) and click 'Search' at the right end of the column header.
- For more details on advanced filter options, see **Custom Views**.

Custom Filter View

- The 'Opportunities' interface allows you to create custom views. For example, you may want to view only those opportunities assigned to you, and only view selected columns like opportunity name, sales stage or assigned to.
- You can create any number of views, and can make any view your default. See **Custom Views** for more

details.

The following sections explain more about:

- Add an Opportunity
- Import and Export Records
- Manage Opportunities
- Associate Other Records with an Opportunity
- Mass Management of Opportunities

3.5.1. Add an Opportunity

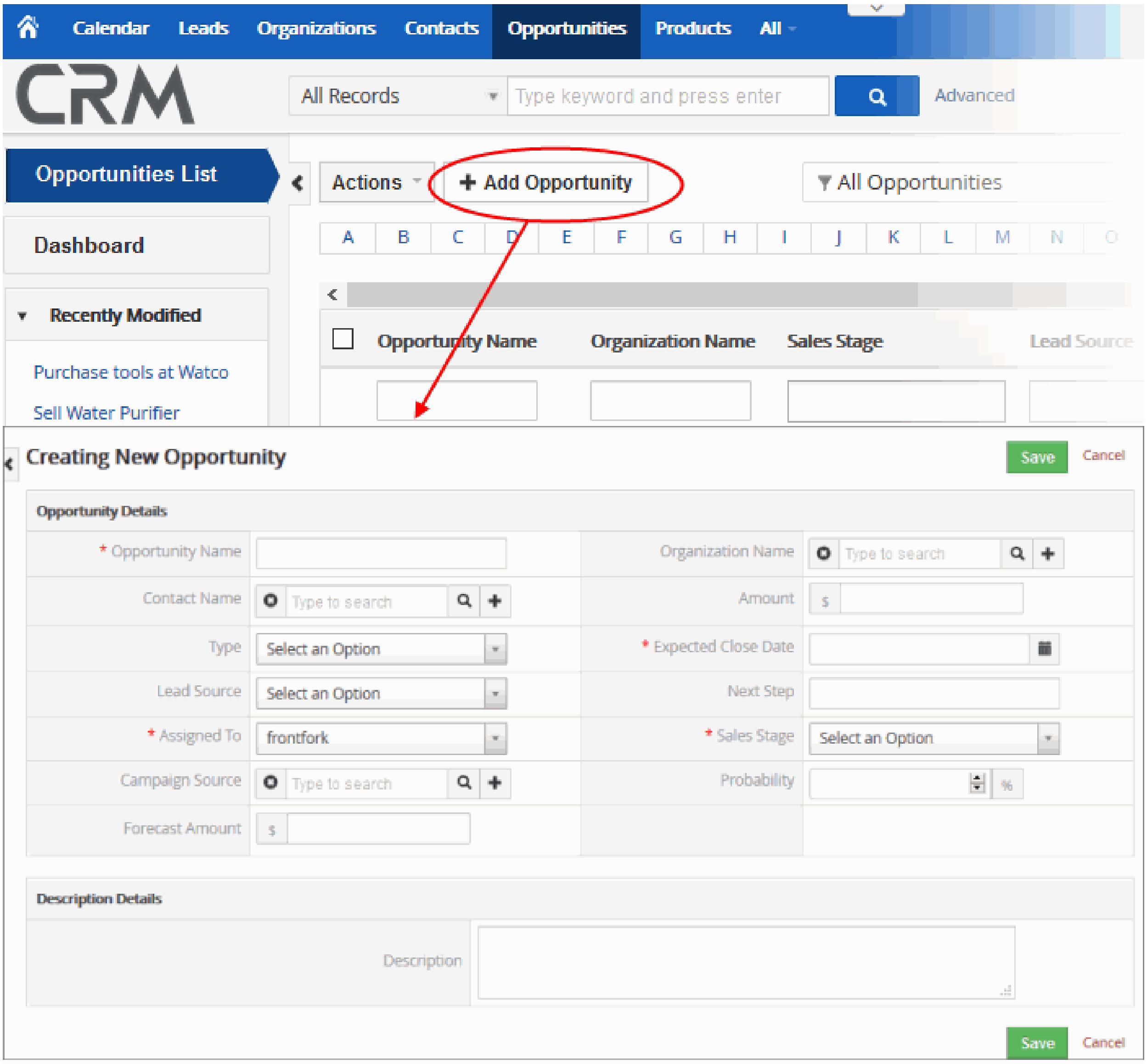
Once you are satisfied that a lead has a good chance of becoming a sale, you can convert it to an opportunity.

There are five possible ways to create an opportunity:

- **Create a new opportunity -** Setup a new opportunity record and specify all its details. See '**Create a New Opportunity Record'** for details.
- **Quick create a opportunity -** Create a new opportunity record with the details you require. Other details can be added later as the business gains momentum. See '**Quick Create an Opportunity Record**' for details.
- **Clone an opportunity -** Duplicate an existing opportunity and use it as a starting point to create a new record. See '**Clone an Opportunity Record**' for details.
- **Import Opportunities -** Import a list of opportunity records from a .csv or .vcf file. See '**Import and Export Opportunities**' for details.
- **Create an opportunity from a lead -** Convert a lead to an opportunity from the 'Leads' interface. See '**Lead Conversion**' in the '**Associate Other Records with a Lead**' section.

Create a New Opportunity Record

- Click 'All' then 'Opportunities' (under 'Marketing and Sales'), or click 'Opportunities' on the title bar
- Click the 'Add Opportunities' button
- The 'Create New Opportunity' page will open. Complete all mandatory fields to register the opportunity. Complete other mandatory fields with as much information as is available to you:



Create New Opportunity - Form Parameters	
Form Parameter	**Description**
Opportunity Details	
Opportunity Name	Specify the name of the opportunity. This field is mandatory.
Organization Name	Choose the customer organization to which the opportunity belongs. You can type an organization name, or click the '+' icon to create a new organization, or click the search icon to browse existing organizations.
Contact Name	Select the contact related to the deal. You can type a contact name, or click the '+' icon to add a new contact, or click the search icon to browse existing contacts.
Amount	Specify the amount that can be expected after closing the deal.
Type	Select 'New Business' if this is the first sales opportunity with the organization or contact. Select 'Existing Business' if you have worked with the organization or contact before.

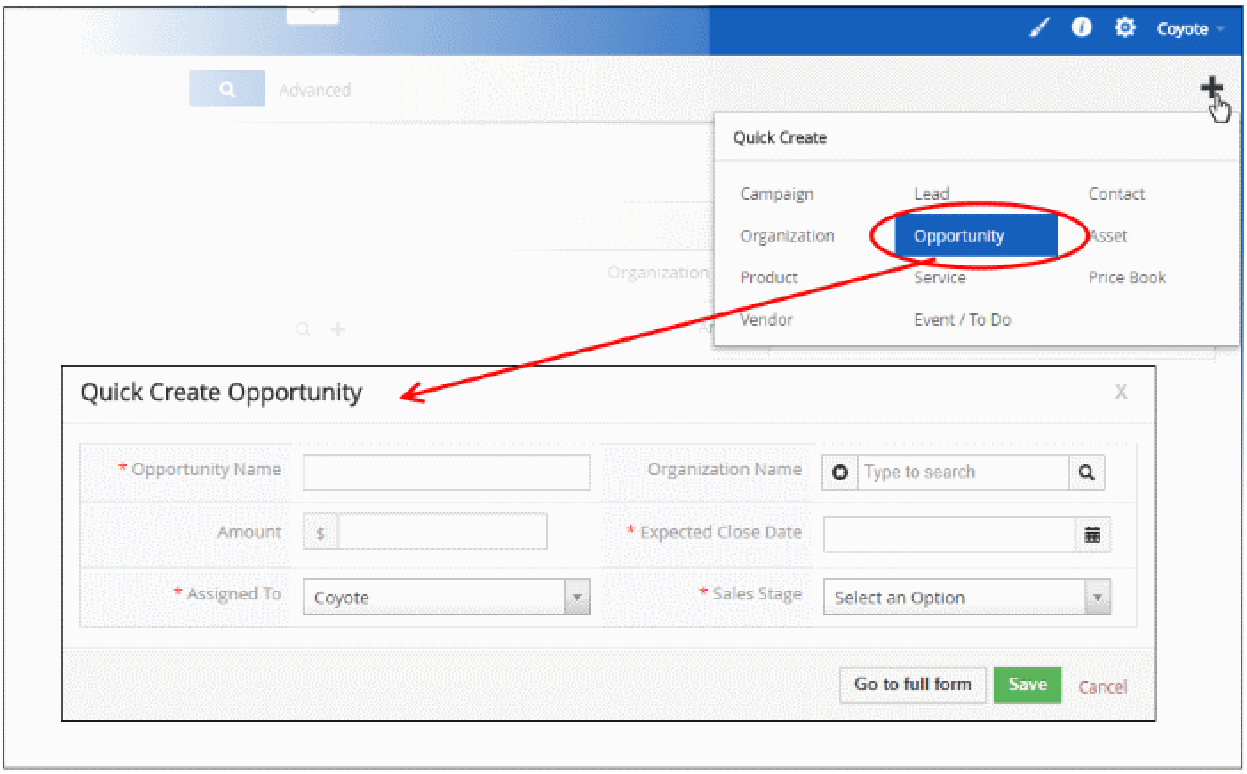
Expected Close Date	Specify or select the expected close date. This field is mandatory.
Lead Source	Select the channel through which the opportunity was acquired.
Next Step	Specify the next step that should be taken towards completing the sale. You can also use the 'Description' field to add a more detailed flow if required.
Assigned To	Select the name of the staff member to whom the deal is assigned. This field is mandatory.
Sales Stage	Select the current status of the opportunity in your sales flow. This field is mandatory.
Campaign Source	Select the campaign related to the deal. You can click the '+' icon to use quick create option to add the campaign or click the lens icon to populate a value automatically.
Probability	Specify the % chance of closing the opportunity.
Forecast Amount	'Amount' * 'Probability'.
Description Details	
Description	Enter any information and directions you would like to add about opportunity.

The opportunity record will be saved and added to the list in the 'Opportunities List' interface.

Quick Create an Opportunity Record

The 'Quick Create' option allows you to create an opportunity record from any interface. It requires you to enter only basic details. You can add more details by clicking 'Go to full form'. You can, of course, also edit the opportunity at a later date to add more details.

- Click the '+' button at the top right from any interface of CRM and choose 'Opportunity' from the options.



- Fill-in the opportunity details in the 'Quick Create Opportunity' dialog. Descriptions of the form parameters are available in this **table**.
- If you want to view and enter all details, click 'Go to full form'.
- Click 'Save'

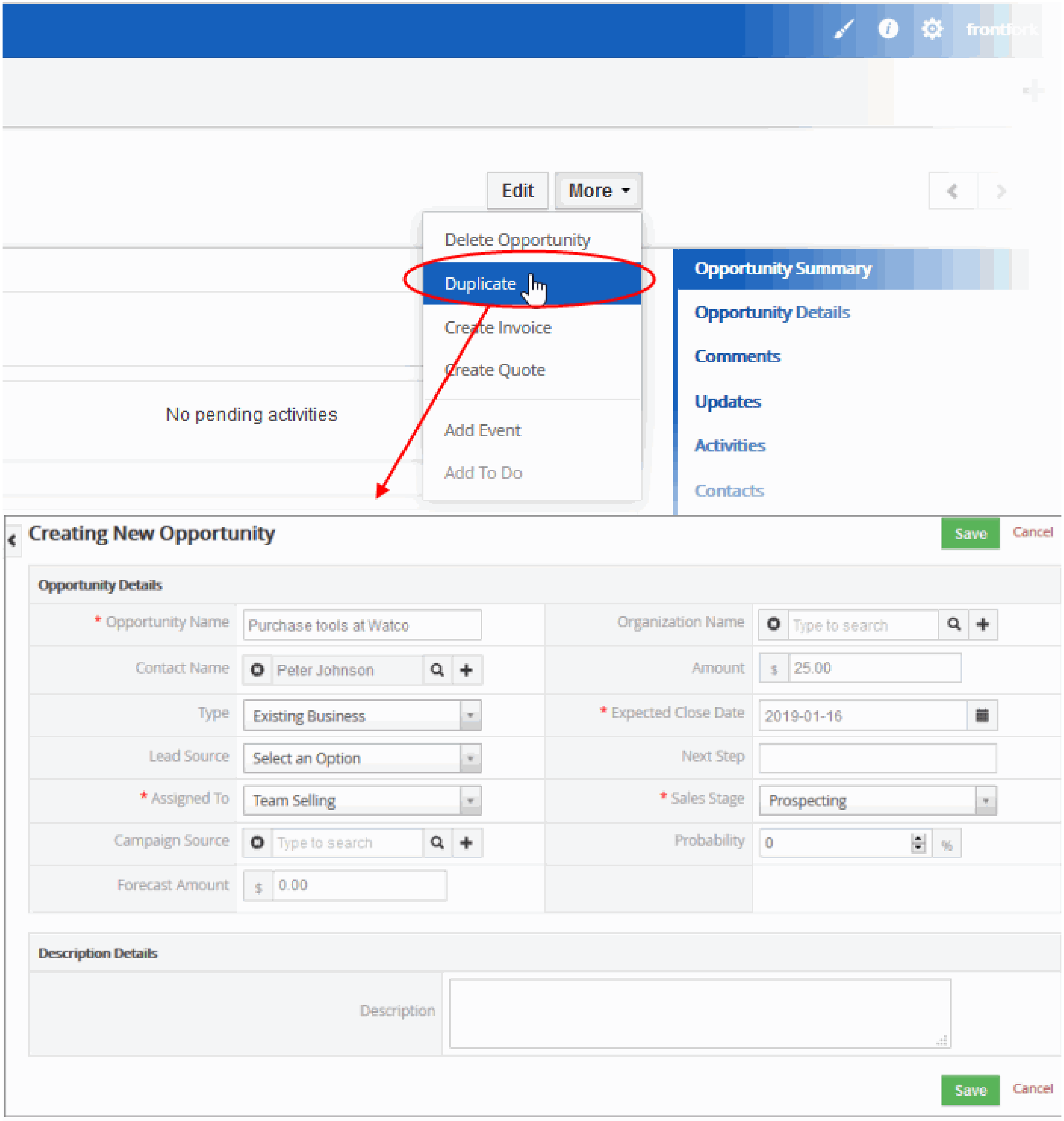
The record will be saved and added to the list of opportunity records in the 'Opportunities' interface. You can open the summary interface for the record by clicking the opportunity name and add/edit the details as required at anytime.

Clone an Opportunity Record

CRM allows you to create a new opportunity record using an existing record as a template. You can then edit the cloned record as required.

To clone an opportunity record

- Click 'All' on the title bar and choose 'Opportunities' under 'Marketing and Sales' to open the 'Opportunities' interface
- Click the name of the opportunity record you want to clone to open the the 'Opportunity Details' interface
- Click 'More' on the top right and choose 'Duplicate'



The 'Creating New Opportunity' form will open with the details populated from the original record.

- Enter a details for the new opportunity
- Edit the details as required. Descriptions of the form parameters are available in the **table above**.
- Click 'Save'.

The opportunity record will be saved and added to the 'Opportunities' interface.

3.5.2. Manage Opportunities

- The 'Opportunities List' shows sales projects which are seen as having a high chance of closing with a sale. Key information is also shown for each opportunity, including sales stage, expected close date, value of the deal and so on.
- Click on an opportunity then click 'Edit' to update the opportunity as required. The editing interface also allows you to view previous updates to the opportunity.

- Staff members can schedule activities and events for the opportunities from this interface. Activities will be shown in the calendars of team members that are assigned to the opportunity.
- You can associate records from other modules to an opportunity. Other modules include organizations, quotes, sales orders, invoices, emails, products and more.

To view an opportunity details:

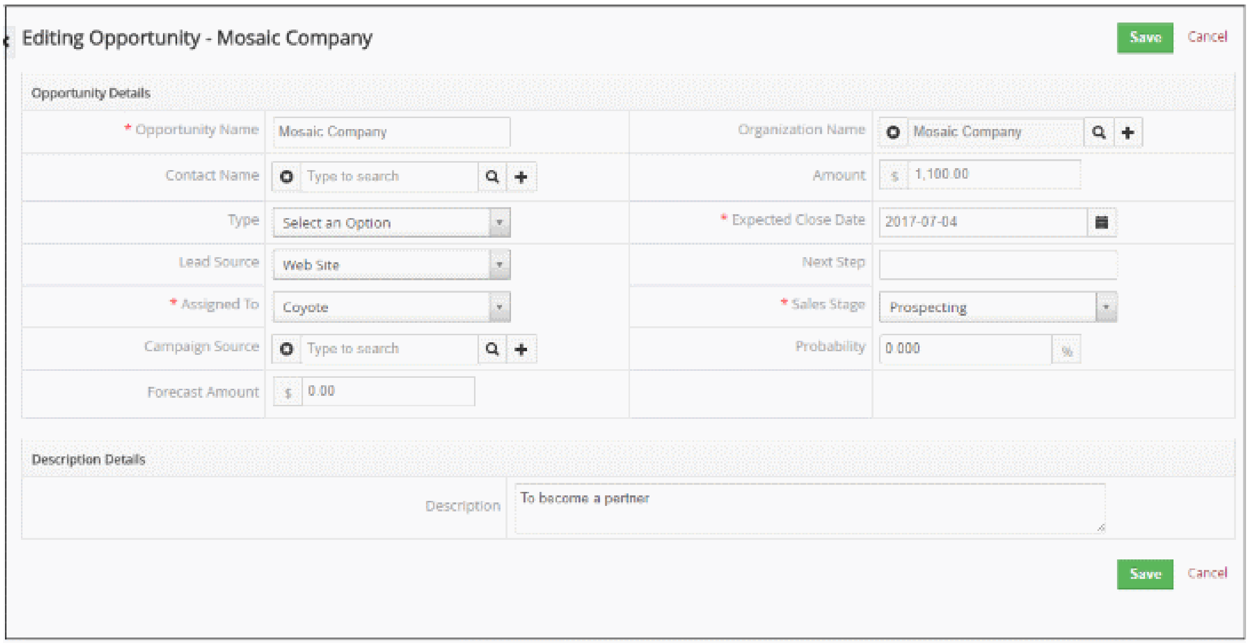
- Click 'All' > 'Opportunities' to open the 'Opportunities List' interface
- Click the opportunity name to open the 'Opportunities Summary' interface
- To see even more information, click 'Opportunity Details' in the right-hand menu

You can edit an opportunity record in three ways:

- Click 'All' > 'Opportunities' to open the 'Opportunities List' interface
- Select the opportunity and then the 'Edit' button from the 'Actions' menu

  OR
- Click the opportunity name and then 'Edit on the top right of the 'Opportunity Summary' interface

  OR
- Click 'All' > 'Opportunities' to open the 'Opportunities List' interface
- Place your mouse cursor anywhere in the opportunity row to display the action buttons on the extreme right of the row.
- Click the 'pencil' icon to open the opportunity edit interface:



- See **this table** for descriptions of the fields in the 'Opportunities Details' interface
- Update the opportunity details as required and click 'Save'

Comments

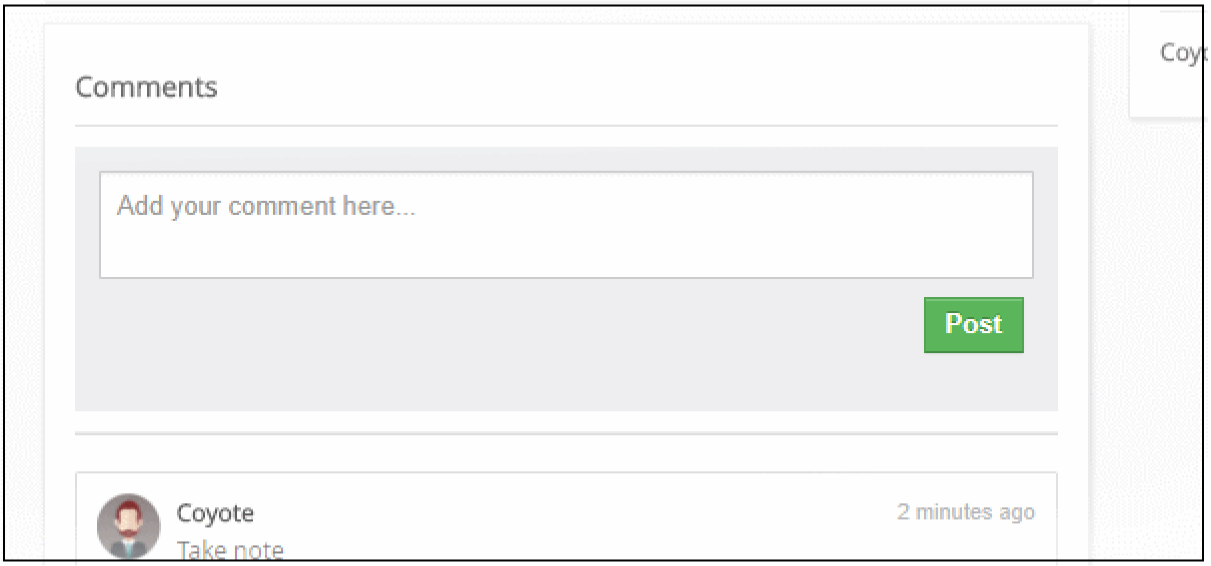
The comments sections allows staff to post internal memos about the opportunity.

To view or post a comment in a record:

- Click 'All' > 'Opportunities' to open the 'Opportunities List' interface
- Select an opportunity record, then click 'Actions' > 'Add Comment' and enter your comments and then click 'Save'.

  OR
- Click the opportunity name to open the 'Opportunities Summary' interface.

- You can view the comments under the 'Comments' section. Click 'Reply' to add comment to the post.
- Enter your message in the 'Comments' box and click 'Post'.



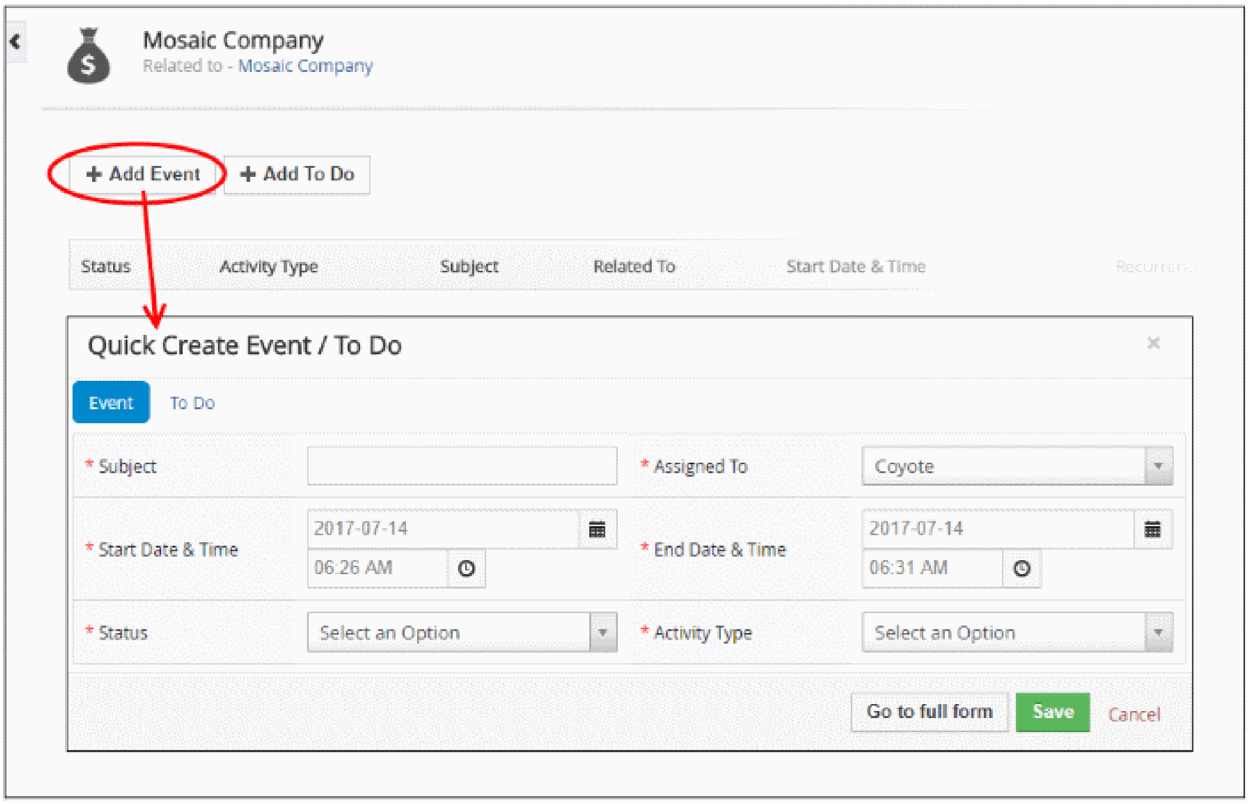
Activities

Activities consist of 'Events' (meetings, calls, webinars etc) and 'To Dos' (product delivery, purchase etc). Administrators can add 'Activities' to an opportunity and these will be added to the CRM calendar. Activities can be viewed by administrators and the staff members to whom the opportunity is assigned. Assigned staff and administrators can add an 'Event' or 'To Do' as an activity of an opportunity record.

To create an Event/To Do:

- Click 'All' > 'Opportunities' (under 'Marketing and Sales') to open the 'Opportunities List' interface
- Click the opportunity name then click 'Activities' from the menu on the right
- Click 'Add Event' or 'To Do' in the activities interface

The 'Quick Create Event / To Do' dialog will open:

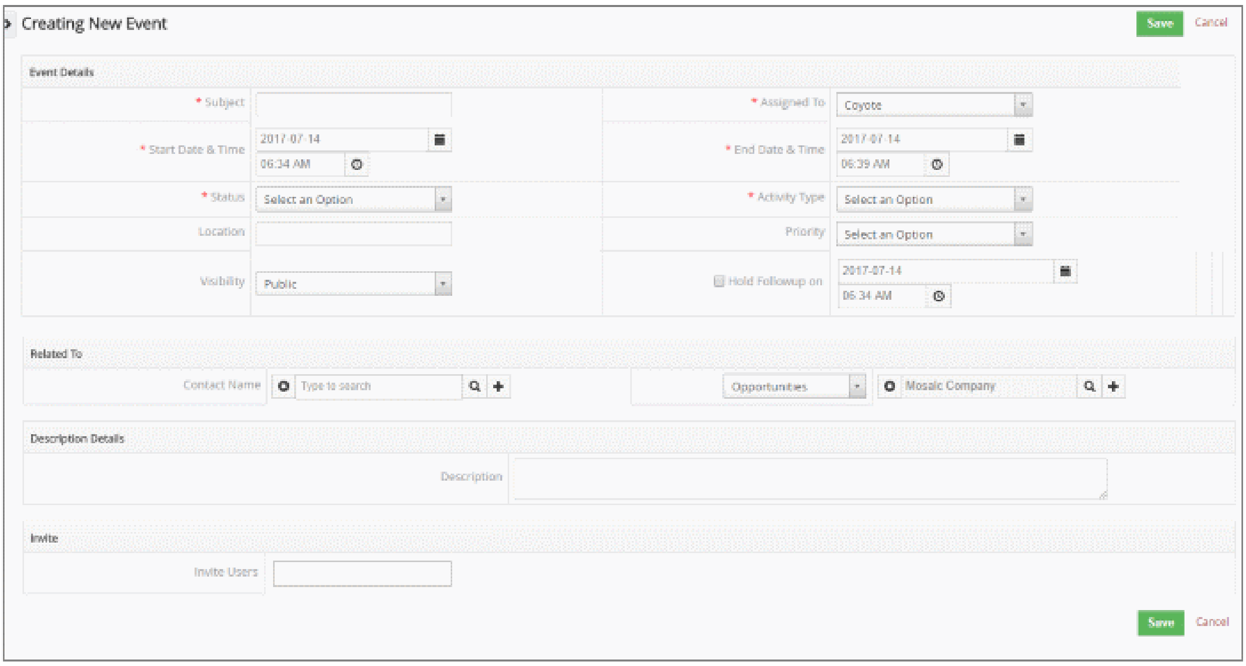


- Complete your event details and click 'Save'.

Please note that the 'Activity Type' option is only available for quick events.

The information in the quick event dialog is basic in nature and will be used to populate the calendar entry. Use the 'full form' if you want to create a detailed event with more information (priority, visibility etc).

- To create a detailed event, click the 'Go to full form' button in the quick event dialog:



- Enter the required details and click 'Save'.

See '**Manage Shared Calendar**' for more details on the 'Event/To Do' full form.

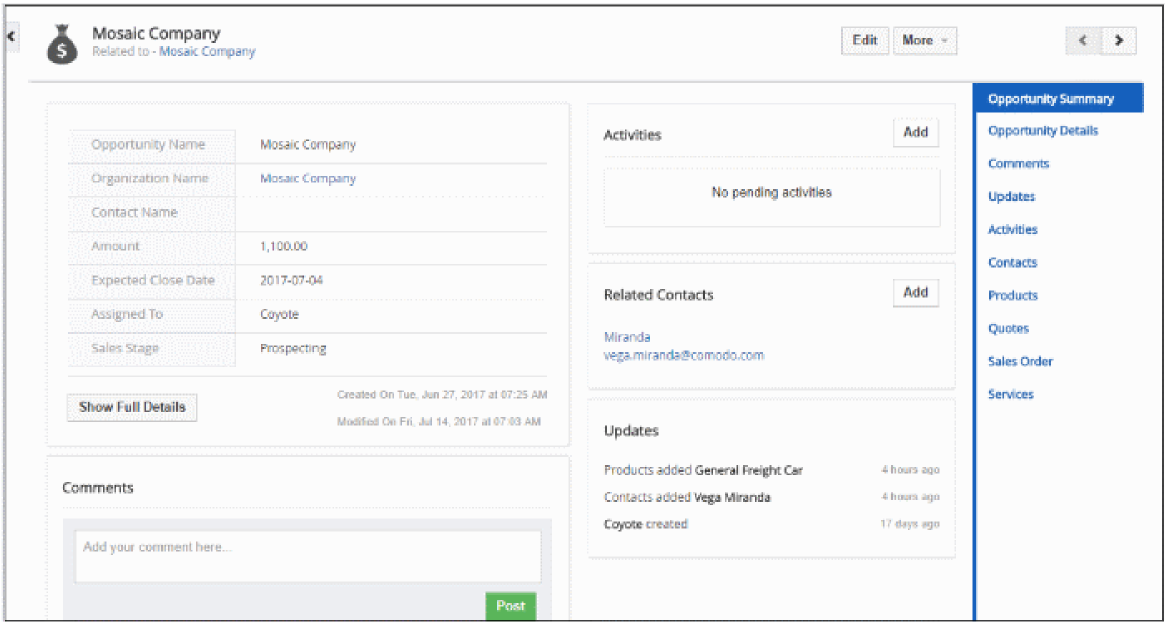
3.5.3. Associate Other Records with an Opportunity

Associating records from other modules to an opportunity allows you to improve visibility and workflows, integrate the opportunity with campaigns and keep track of activities on the opportunity. Associating an opportunity with a product or service quickly informs staff members which of your offerings are under discussion with the contact or organization.

To view, add and manage associated records:

- Click 'All' > 'Opportunities'
- Click any opportunity to open its detail page

The menu on the right shows modules that can be associated with the opportunity. Click any of these links to view records that have already been associated with the opportunity:



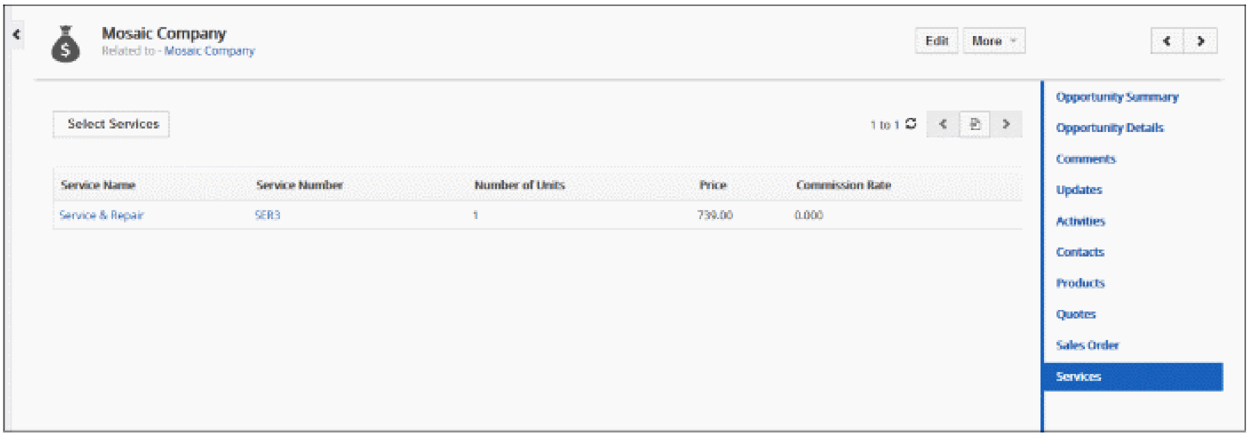
You can use these links to create records in the other modules which will be linked to the campaign.

You can associate following records with opportunities:

- Activities - Schedule a meetings, calls and To-dos on the opportunity record
- Contacts - Select a new contact and associate with the opportunity record
- Products - Select existing products to the product record
- Quotes - Create a new quote and associate with the opportunity record
- Sales Order - Create a new sales order and associate with the opportunity record
- Services - Select the services and associate with the opportunity record

The example below describes how to view and manage the 'Services' records associated with an opportunity. A similar process can be followed to associate other module types.

- Click 'All' > 'Opportunities'
- Click on an opportunity in the list then click 'Services' on the right

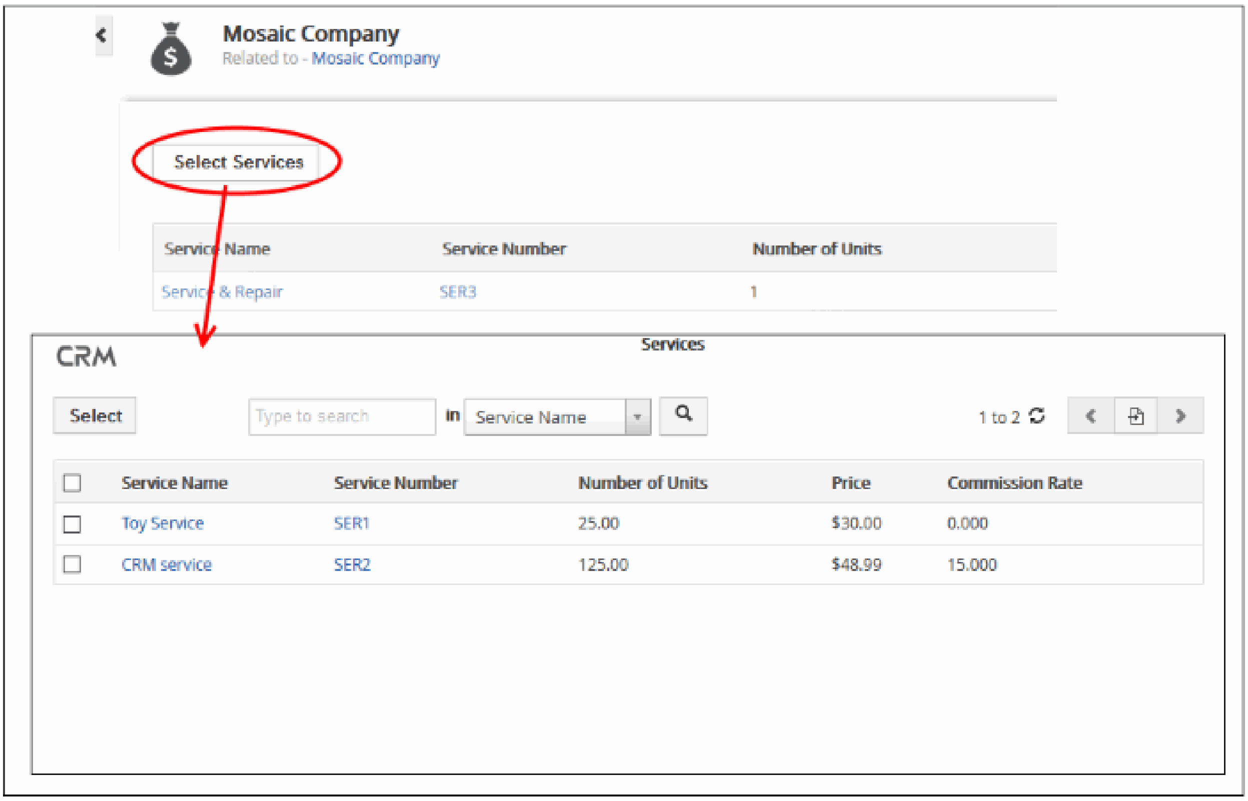


The interface allows you to:

- **Associate new services records with an opportunity**
- **Manage associated services record**

Associate Services Records with an opportunity

- As mentioned earlier, click open an opportunity then click 'Services' on the right.
- Click the 'Select Services' button.
- This will display a list of services that you can associate with the opportunity:



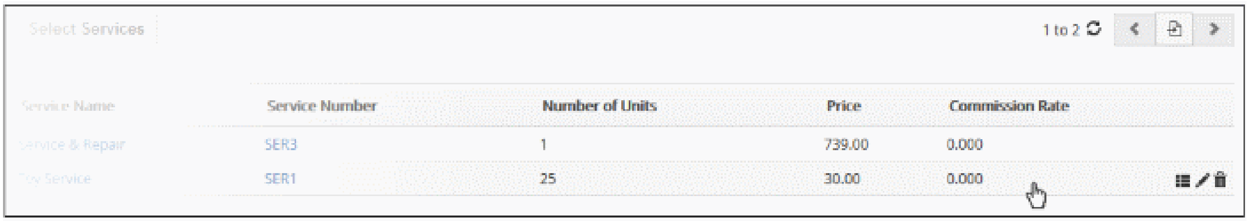
- If the list is empty or you wish to add a new service, click 'All' > 'Services' > '+ Add Service'
- Choose the service(s) you want to associate with the opportunity and click the 'Select' button (top left)

The service(s) will be added to the list of services associated with the record.

Manage Associated Services Records

The associated services list lets you view and edit service details, and dissociate services.

- Mouse over a service record to view the options at the far right end of the row



- The following options are available:

- Opens the service details interface of the respective service record. See '**Services**' for more details.

- Allows you to edit the service details. See '**Services**' for more details.

- Removes the association between the service and the opportunity. Note, this doesn't remove the service itself, which will remain available in the '**Services**' module.

In the similar manner you can associate and manage records from other modules that are listed on the right.

3.5.4. Mass Management of Opportunities

CRM allows you to edit, delete and add comments for several opportunities records at once. This is useful when you are updating or altering details that are common to a set of opportunities records. For example, you may have several opportunities with different staff members, different close dates and different projected revenues, but would like to pass a common comment to staff assigned to those opportunities.

Tip: If you want to update the details of a *single* opportunity record:
- Open the 'Opportunities List', click the opportunity name then click the 'Edit'/ button.
- See '**Manage Opportunities**' for more details.

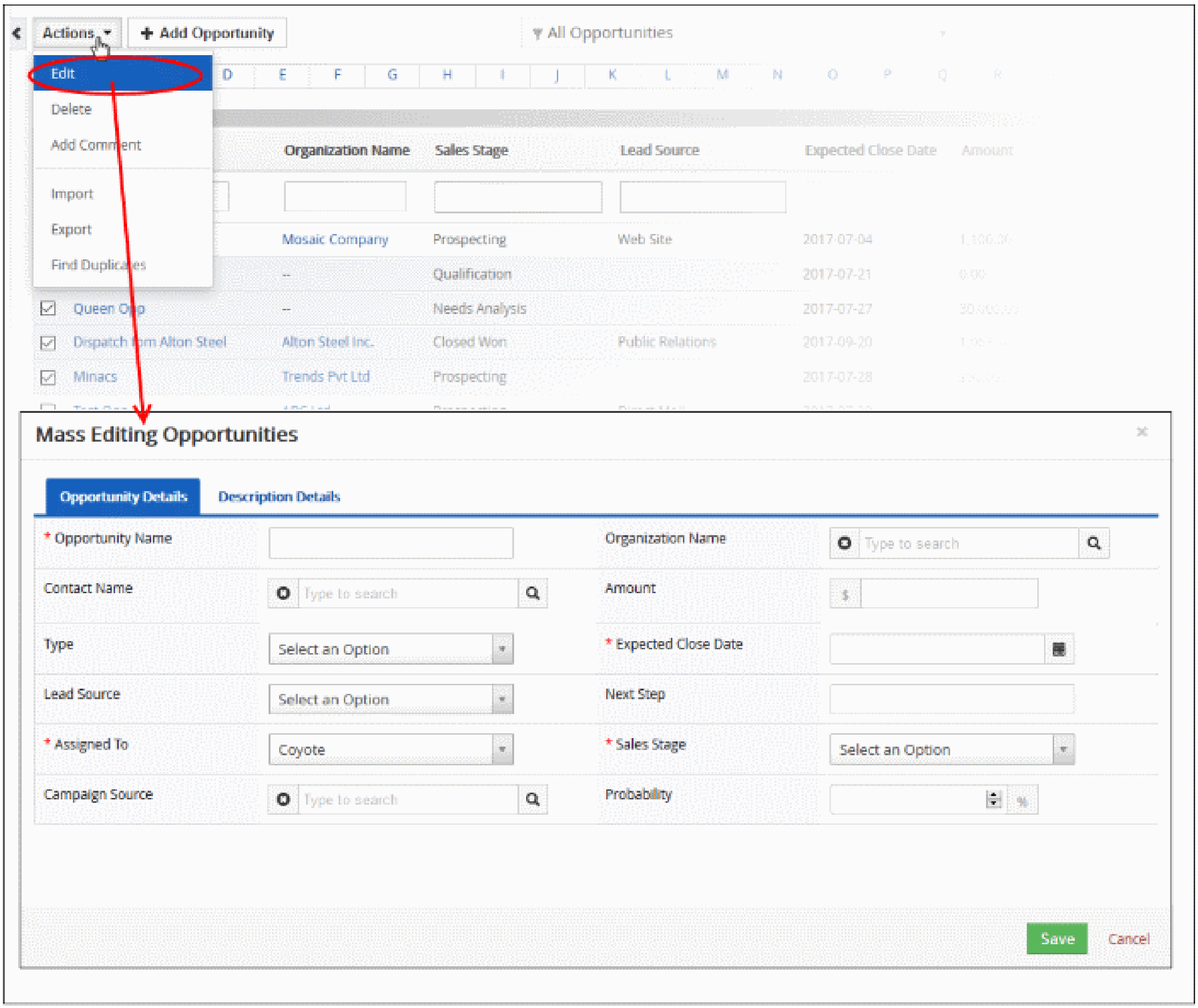
The interface allows you to:

- **Edit opportunities records**
- **Delete opportunities records**
- **Add comments**
- **Import / Export opportunities records**
- **Find duplicates**

To edit common details of several opportunities

- Click 'All' > 'Opportunities' (under 'Marketing and Sales') to open the 'Opportunities List' interface
- Select the opportunities to be edited
- Click 'Actions' and choose 'Edit'

The 'Mass Editing Opportunities' pop-up will appear:



It contains four tabs:

- Quotes Details
- Address Details
- Terms & Conditions
- Description Details

Opportunity Details

The 'Opportunity Details' tab allows you to specify opportunity name, organization name and more.

- Enter the new values for the parameters. See **this table** for descriptions of the fields in the 'Opportunity Details' tab
- Click 'Save'.

Description Details

The 'Description Details' tab allows you to enter a common description for the selected opportunities records.

- Enter the new description and click 'Save'

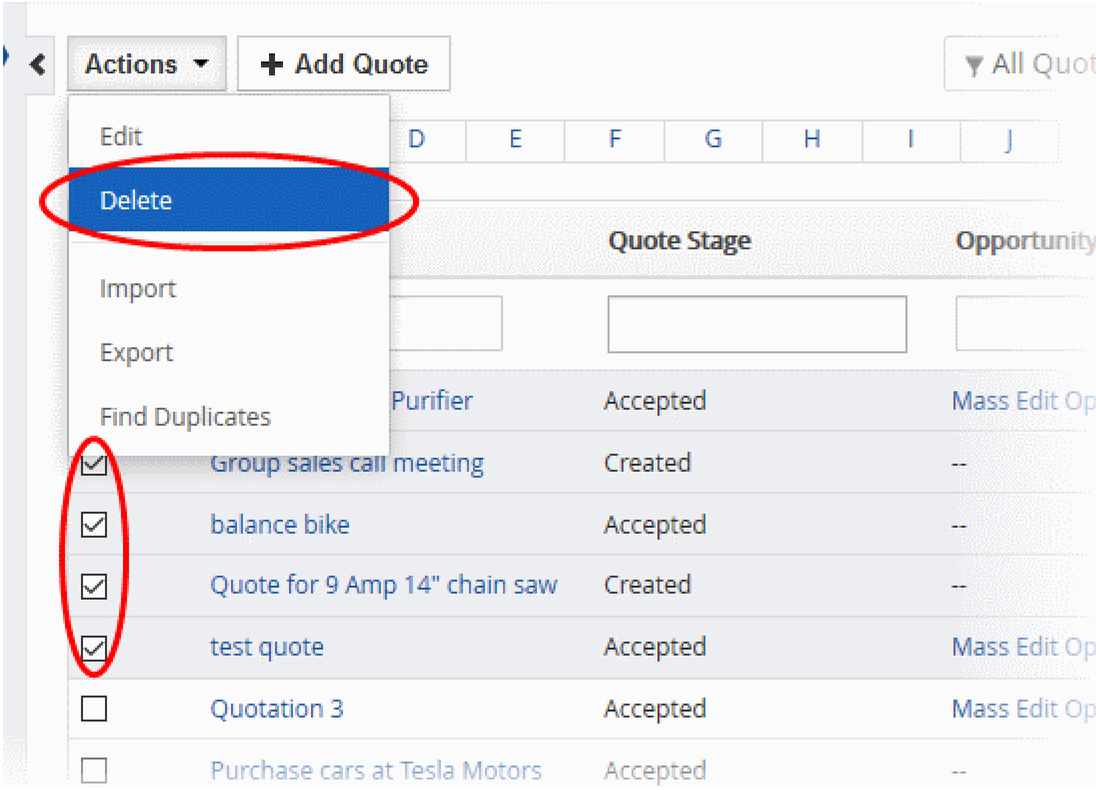
Deleting Quote Records

Quote records that are no longer required can be removed.

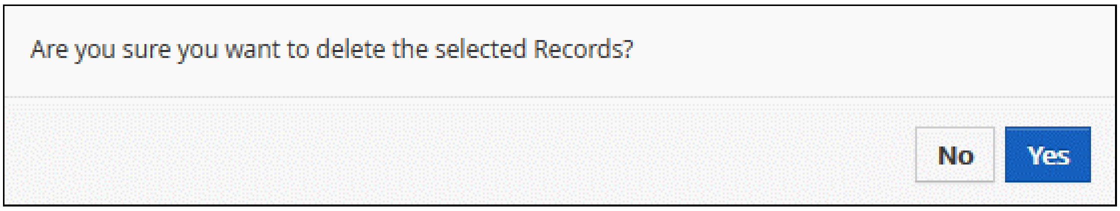
To remove opportunities records

- Click 'All' > 'Quotes' (under 'Marketing and Sales') to open the 'Quotes List' interface

- Select the quotes to be deleted
- Click 'Actions' and choose 'Delete' button.



- Click 'Yes' in the confirmation dialog to remove the record(s)



Import / Export Opportunities Records

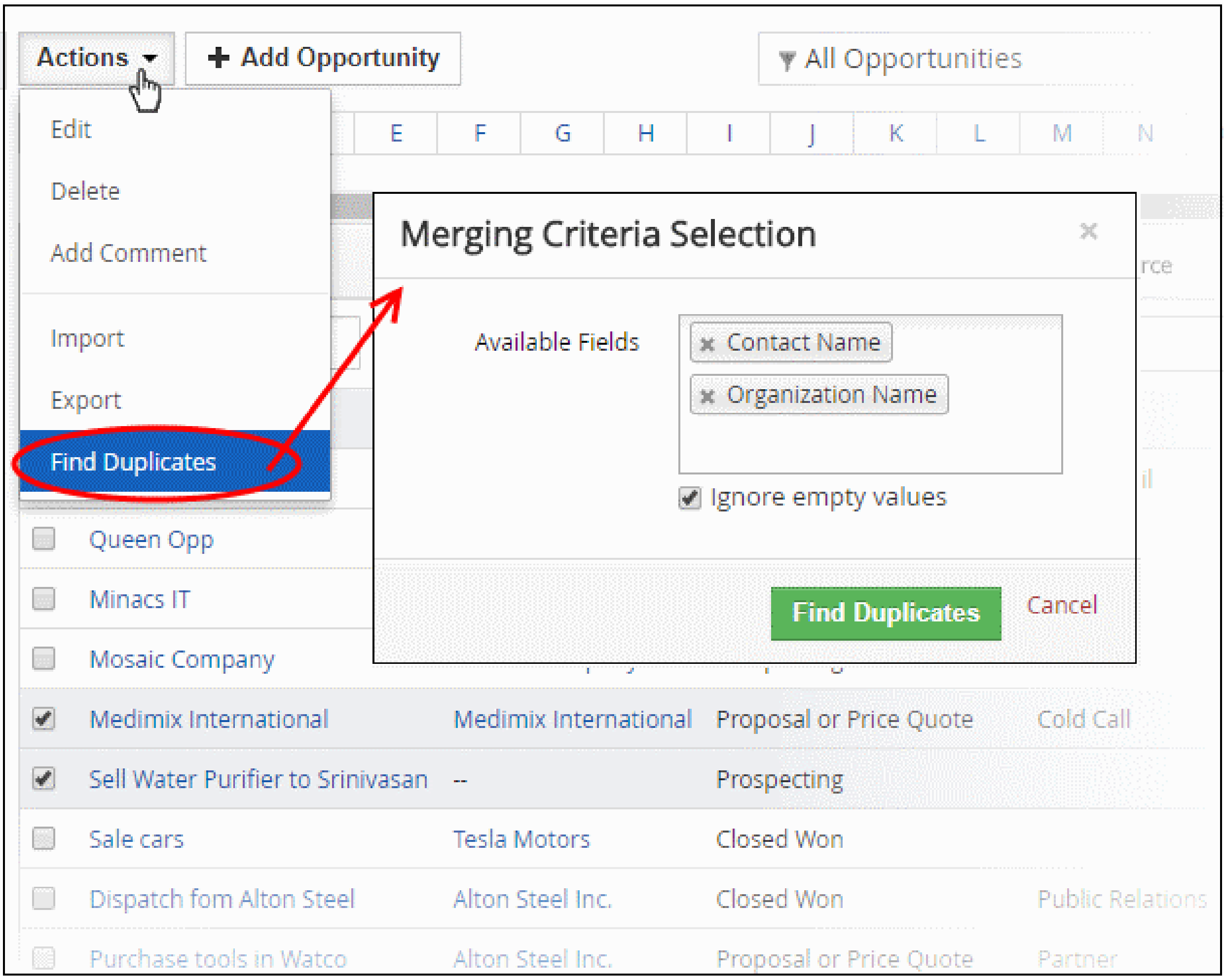
You can import saved records and export opportunities records from this interface. See '**Import and Export Records**' for more information.

Find Duplicates

You can find duplicate records from multiple opportunity records at once.

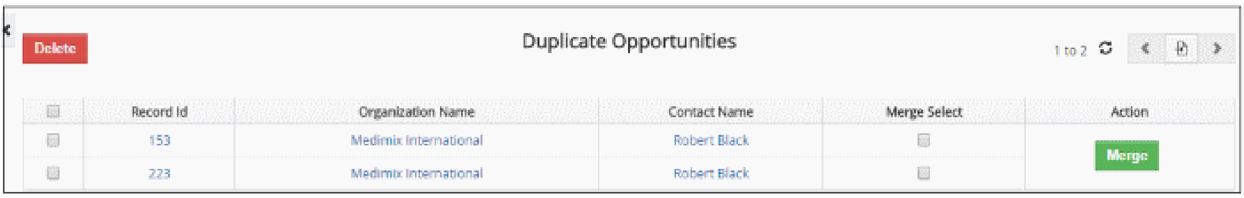
To find duplicate opportunities records:

- Click 'All' > 'Opportunities' (under 'Marketing and Sales') to open the 'Opportunities List' interface
- Click 'Actions' and choose 'Find Duplicates'



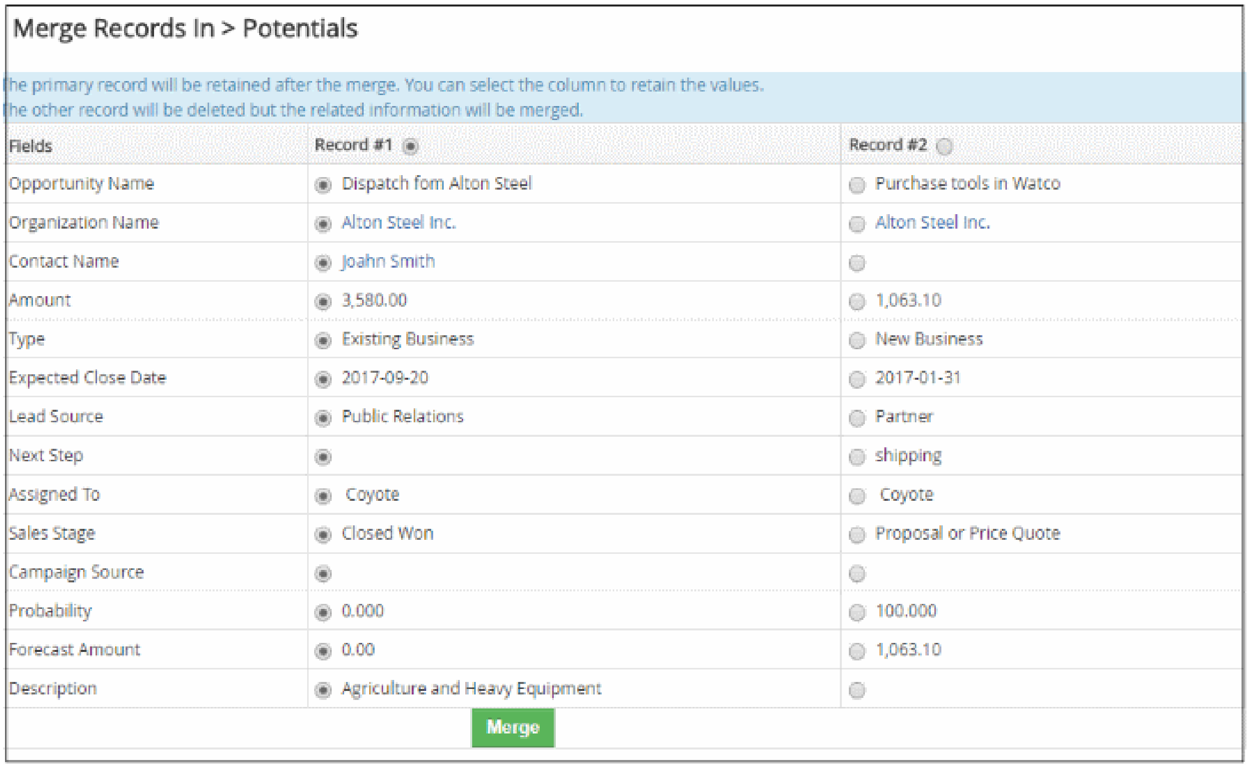
- Click in the 'Available Fields' box and choose the opportunity related fields from the drop down. 'Ignore empty values' means the CRM will not consider matching blank fields as indicating a duplicate.
- Click 'Find Duplicates'

The 'Duplicate Opportunities' page will be displayed.



- To delete a duplicate opportunity record, select it and click the delete button on the top left.
- To merge duplicate records, select them in the 'Merge Select' rows and click 'Merge'

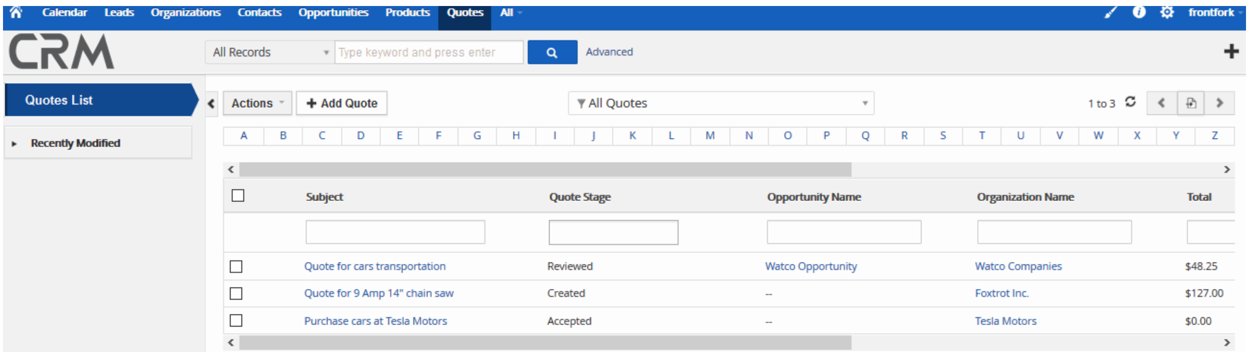
The 'Merge Records' dialog will be displayed:



- Select the column values that should be retained in the merged record. Please note you can select only one column value for the merged record.
- Click 'Merge'. The records will be merged and displayed in the 'Opportunities List' page as per the selected column values.

3.6. Quotes

A 'Quote' is a statement of offered services and prices sent by a seller to a prospective buyer. Quotes usually contain a detailed list of products and services, prices and taxes, delivery dates, terms and discounts and more. You can edit quotes at any time to update details as required.



- View existing quotes - Click 'All' > 'Quotes'
- Create new quote - Click 'All' > 'Quotes' > 'Add New Quote'
- Edit a quote - Click 'All' > 'Quotes' > open a saved quote > 'Edit'
- Send a quote - Click 'All' > 'Quotes' > open a saved quote > 'More' > 'Send Email with PDF'

The following sections explain how to create and manage quotes in CRM:

- **Create Quotes**
- **Manage Quotes**

- **Associate Records from other modules to a Quote**
- **Mass Management of Quotes**

3.6.1. Create Quotes

- Click 'All' > 'Quotes' to open the quotes interface.

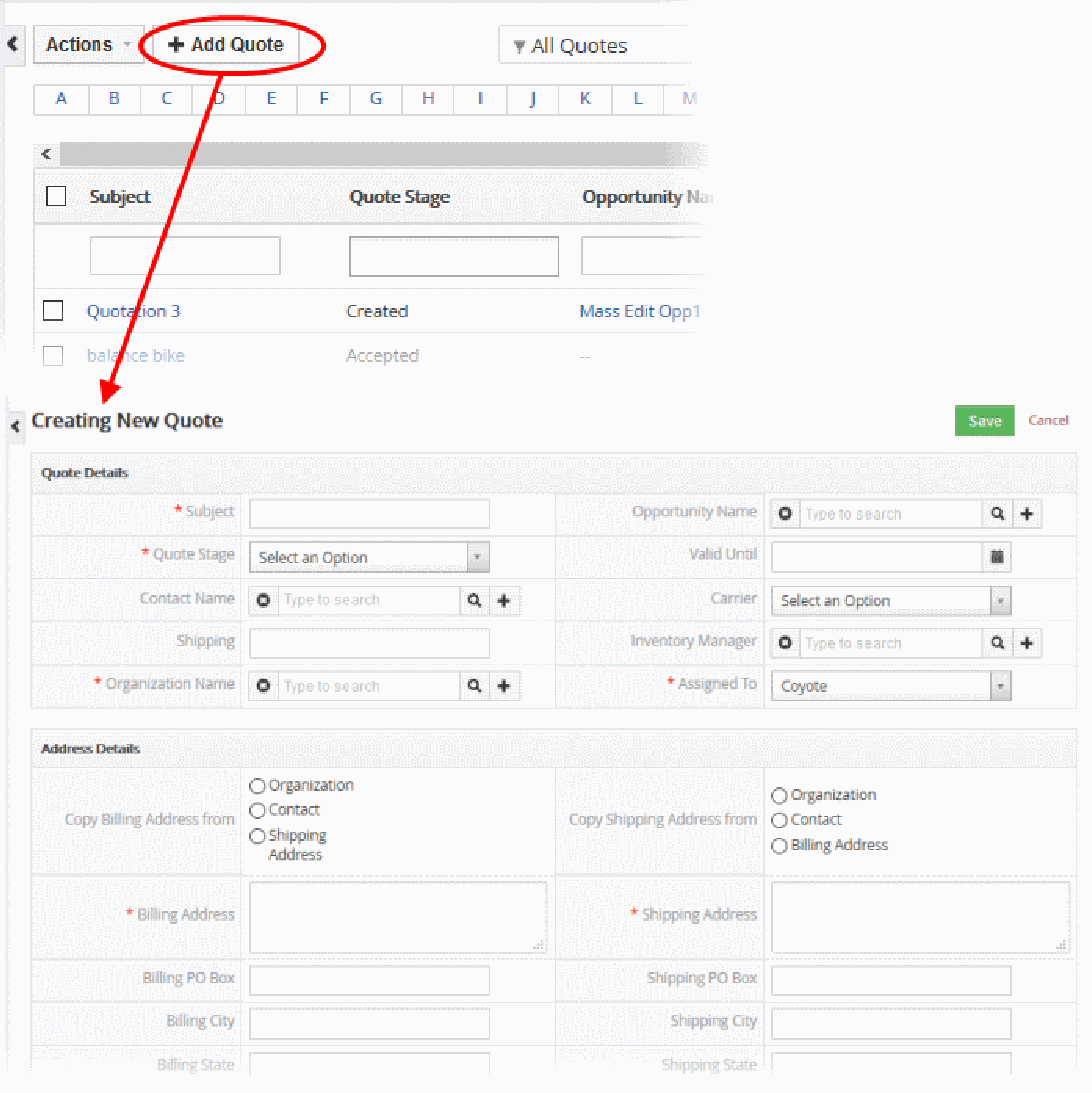
There are four ways to create quotes:

- **Create a new quote record -** Setup a new quote from scratch. See **Create a New Quote Record** for details.
- **Clone a quote -** Duplicate an existing record and use it as a starting point to create a new record. See **Clone a Quote** for details.
- **Create a quote from other modules -** You can create a quote from the organization, contact product interfaces. Open one of these interfaces then open a specific record then click 'Quote' in the right hand menu. See **Create quotes from other modules** to learn more.
- **Import quote records -** Bulk import quotes from a .csv or .vcf file. See **Import and Export Records** for details.

Once a quote has been created you can associate it with organizations, contacts and leads as required. See 'Associating a Quote with another Record' for more details.

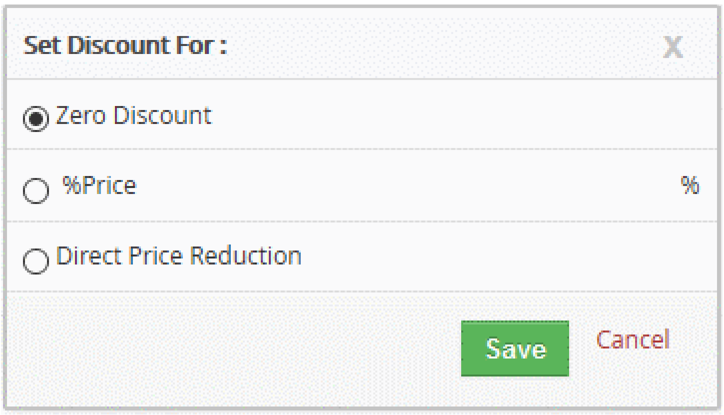
Create a New Quote Record

- Click 'All' then 'Quotes' (under 'Marketing and Sales')
- Click the 'Add Quotes' button
- The 'Create New Quote' page will open. The interface lets you specify general quote details, address and shipping information, terms and conditions, included products/services, and taxes/charges/deductions.



Creatte New Quotes - Form Parameters	
Form Parameter	**Description**
Quotes Details	
Subject	Specify a name of the quote. This field is mandatory
Opportunity Name	Select the opportunity related to the quote • Click the search icon to select from a list of existing organizations • Create a new opportunity by clicking the '+' icon
Quote Stage	Select the current status of the quote.
Valid Unit	The date that the quote is valid until.
Contact Name	Specify the contact for whom the quote was created (optional). • Click the search icon to select from a list of existing contacts • Create a new contact by clicking the '+' icon

Carrier	Select the name of the shipping company.
Shipping	Optional. Add general notes about shipping that are not covered elsewhere. For example, 'Same Day shipment required'.
Inventory Manager	The person responsible for shipping the order to the account or contact. • Click the search icon to select from a list of existing contacts • Create a new inventory manager by clicking the '+' icon
Organization Name	The customer company that the quote is for (mandatory field) • Click the search icon to select from a list of existing organizations • Create a new organization by clicking the '+' icon
Assigned To	Select the staff member responsible for the quote. This can often be the same member of staff responsible for the lead, opportunity or organization related to the quote. This field is mandatory.
Address Details	
Copy Billing Address from	Choose whether to copy the billing address from the organization, contact or shipping address.
Copy Shipping Address	Choose whether to copy the shipping address from the organization, contact or billing address.
Billing Address	Billing address of the target organization.
Shipping Address	Shipping address of the target organization.
Description Details	
Description	Enter a description of the quote for the target organization. This will be visible in the final quote.
Item Details	
Currency	Choose the currency specified in the quote. The currency is specified in the 'Grand Total' row of a quote pdf. **Note**: CRM currencies are defined in the settings interface. Click the cog icon at top right to open the settings interface.
Tax Mode	Choose whether to apply group or individual product taxes • **Group**: Applies the tax rate defined in CRM settings to all products. The 'Tax' link will be displayed allowing you to edit the individual tax rate defined for the product. • **Individual**: Applies individual tax rates for each product. Product tax rates can be defined in each product's details page.
Tools	You can perform two actions using tools • - Delete the item • - Re-position the item to organize them in a specific order.
Quantity	Number of items in stock.
List Price	There are three ways to populate the list price: • Simply choose an item in the 'Item Name Field'. The list price will be

	auto-populated if a price has been defined in the product's details page.
	• Enter the price manually.
	• Select a price book which specifies a price for the product.
	• **Discount**
	  • Click the 'Discount' link to offer discounts on the list price
	  • Select 'Zero Discount' for no discount
	
	  • Select '%Price' and enter a percentage discount
	  • Select 'Direct Price Reduction' option and enter a discount amount

Total After Discount	Price after discounts are applied.
Add Product	Adds a new product item row to the quote. **Note**: You can add a product in two ways: • Enter the first three letters of the product name and select the product from the drop down menu • Click the product  icon and select an item from the product list.
Add Service	Adds a new service item row to the table.

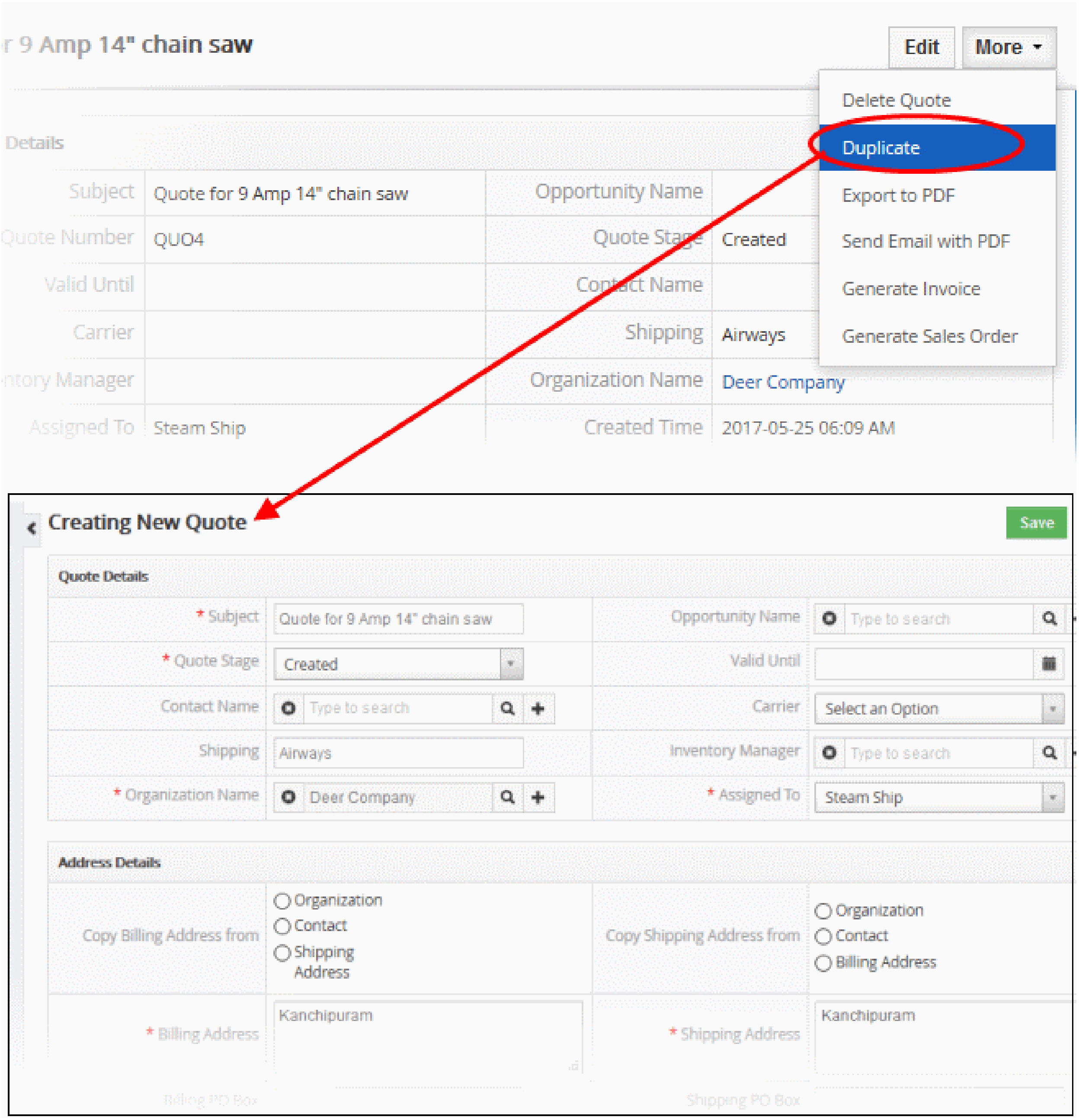
- **Items Total -** Total price of all products and services in the quote.
- **Discount -** Total discounts across all products and services.
- **Shipping & Handling Charges -** Enter the shipping and handling charges for all items.
- **Pre-Tax Total -** Total price of all products and services before taxes are applied.
- **Tax -** Click the 'Tax' link to view set tax. Note: This field will appear only for 'Group' tax mode.
- **Adjustments -** Specify if there are any adjustments such as discounts or extra charges on the taxable amount.
- Click 'Save'

Clone a Quote

CRM allows you to create a new quote using an existing record as a template. You can then edit the cloned record according to the requirements. This is useful, for example, when you have a quote which has all the required products and services already configured but you just need to edit the company details.

To clone a quote record

- Click 'All' on the title bar and choose 'Quote' under 'Marketing and Sales' to open the 'Quotes List' interface
- Click on the name of the quote record you want to clone to open the the 'Quote Details' interface
- Click 'More' on the top right and choose 'Duplicate'



The 'Creating New Quote' form will open with the details populated from the original record.

- Enter a new name for the new quote
- Edit the details as required. Descriptions of the form parameters are available in the **table above**.
- Click 'Save'.

The quote record will be saved and added to the list of quote records in the 'Quote List' interface.

Create a record from another module

You can also create new quotes from other modules. For example you can create a quote from a particular sales record. See '**Associate Records from other modules to a Quote**' for more information.

3.6.2. Manage Quotes

- The 'Quotes List' interface lets you view and update quotes details, including contact information, shipping information, assigned staff and more.
- Open a quote then click 'Edit' to view the quote action menu. You can email a quote to your customer as a PDF attachment, duplicate the quote, export the quote to pdf, create an invoice from the quote and more.
- You can schedule activities and events for quotes from this interface. Activities will be shown in the calendars of team members that are assigned to the quote.

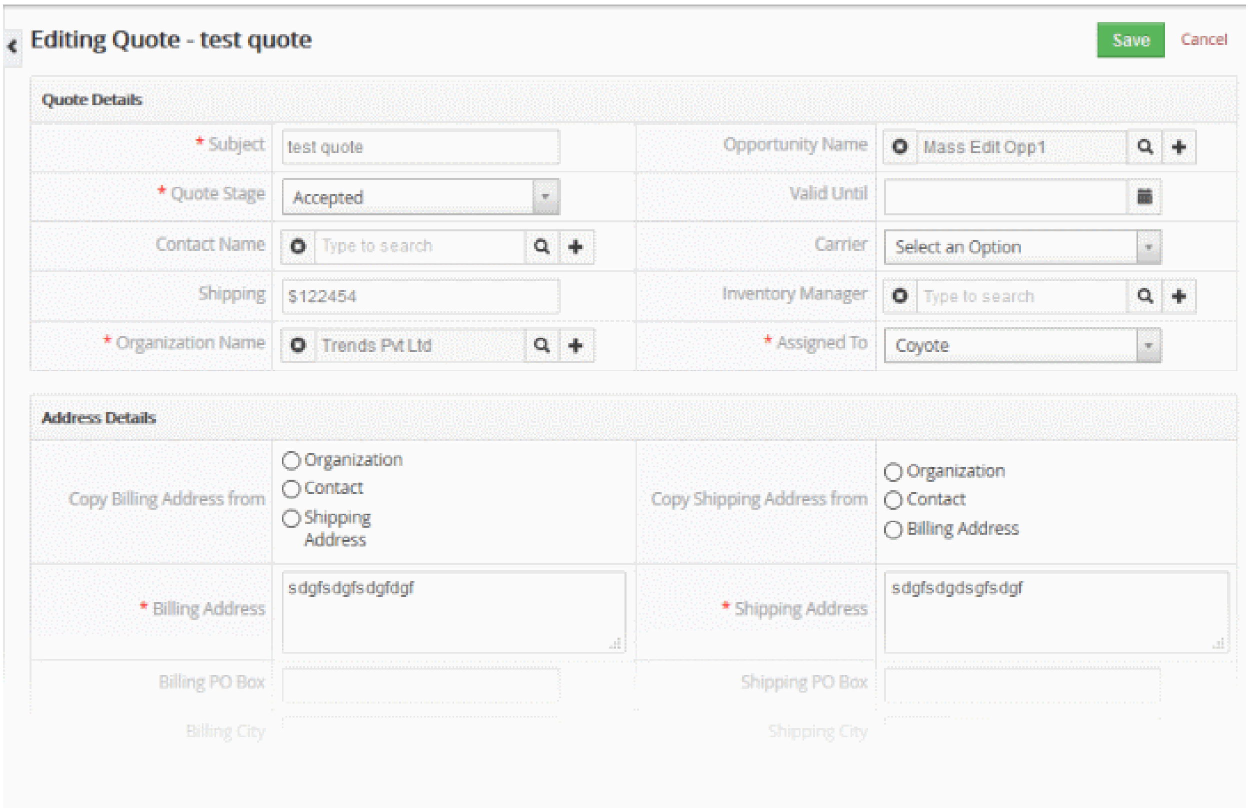
To view quote details:

- Click 'All' > 'Quotes' to open the 'Quotes List' interface
- Click on a quote in the list to open the 'Quote Details' interface

To edit a quote:

- Open a quote as explained above
- Click 'Edit' in 'Quote Detail' interface

  OR
- Click 'All' > 'Quote' to open the 'Quote List' interface
- Place your mouse cursor anywhere in the quote row to reveal the icons on the right of the row.
- Click the 'pencil' icon to open the quote edit interface:



- See **this table** for descriptions of the fields in the 'Quote Details' interface
- Update the quote details as required and click 'Save'

The links on the right of a quote detail page let you view and manage the following items:

- Quote Details - Shows complete quote details
- Updates - Track all modifications done on the quote record
- Sale Order - Lists sales orders associated with the quote. You can associate an existing sales order with a quote by editing a sales order. Click 'All' > 'Sales Order' > open a sales order > click 'Edit' > use the 'Quote Name' field to specify the quote which you want to associate with the order.
- Activities - Allows you to view and add tasks to the quote

Please see **Associate a Sale Order to a Quote** for more details.

The interface allows you to:

- Select a desired quote record
    - Click 'Edit' to modify a field information
- 'More' menu:
    - 'Delete Quote' to delete quote record
    - 'Duplicate' to clone the record to use it as the basis of a new quote. See '**Clone a record**' to find out more.
    - 'Export to PDF' to export the quote record
    - 'Send Email with PDF' to send the quote to a contact as pdf attachment. See '**Emails**' to know more.
    - 'Create Invoice' to create an invoice for the quote record. See '**Create an Invoice**' to know more.
    - 'Generate Sales Order' to create a sales order for the quote record. See '**Associate a Sales order to a Quote** to know more.

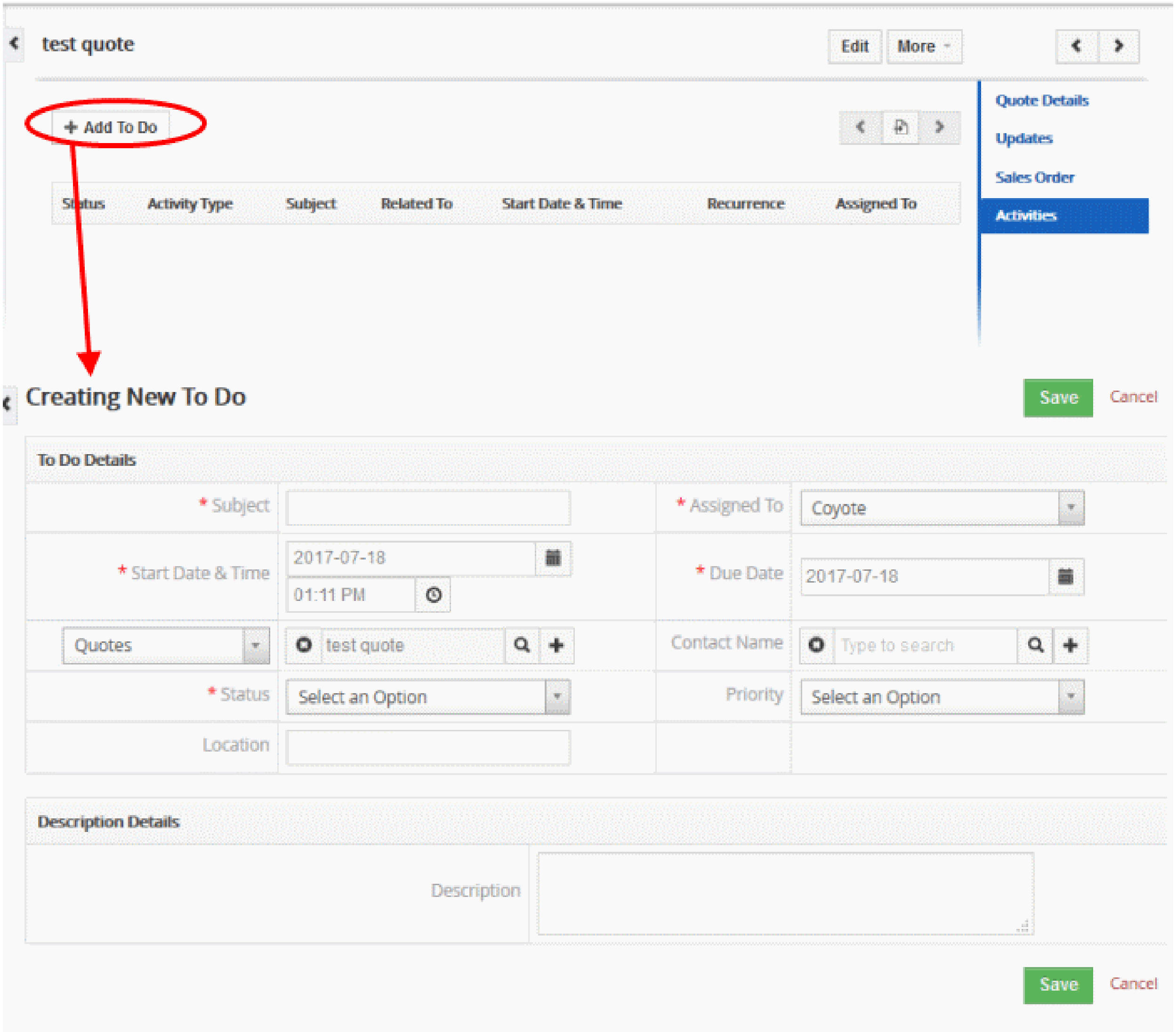
Activities

A 'To Do' activity is a task with a set start time and a due date. You can assign the quote 'to do' to a staff member. For example, you may require the staff member to configure the quote, or may simply want to tell them to send it to the customer by a certain time. You can add a description in the field at the bottom. Quote activities will be added to the CRM calendar.

To create an 'To Do' activity:

- Click 'All' > 'Quote' (under 'Marketing and Sales') to open the 'Quote List' interface
- Click the quote name then click 'Activities' from the menu on the right
- Click 'To Do' in the activities interface

The 'Creating New To Do' interface will open:



- Complete your activity details and click 'Save'.

See '**Manage Shared Calendar**' for more details on the 'Event/To Do' full form.

3.6.3. Associate Records from other modules to a Quote

You can associate sales orders and activities to quote. On agreement of a quote, the staff member can generate a sales order / invoice to keep track of further stages of the deal.

Two ways to associate a quote with other modules:

1. Create a quote from modules like 'Products', 'Services', 'Organizations', 'Contacts' and 'Opportunities' and these quotes created will be listed in 'Quotes List' interface of the quote module.
2. You can map any one of the other modules like 'Organization', 'Opportunity', 'Contacts' and 'Products or Services' by selecting their respective names selected in their fields while creating a quote from the 'Quotes List' interface.

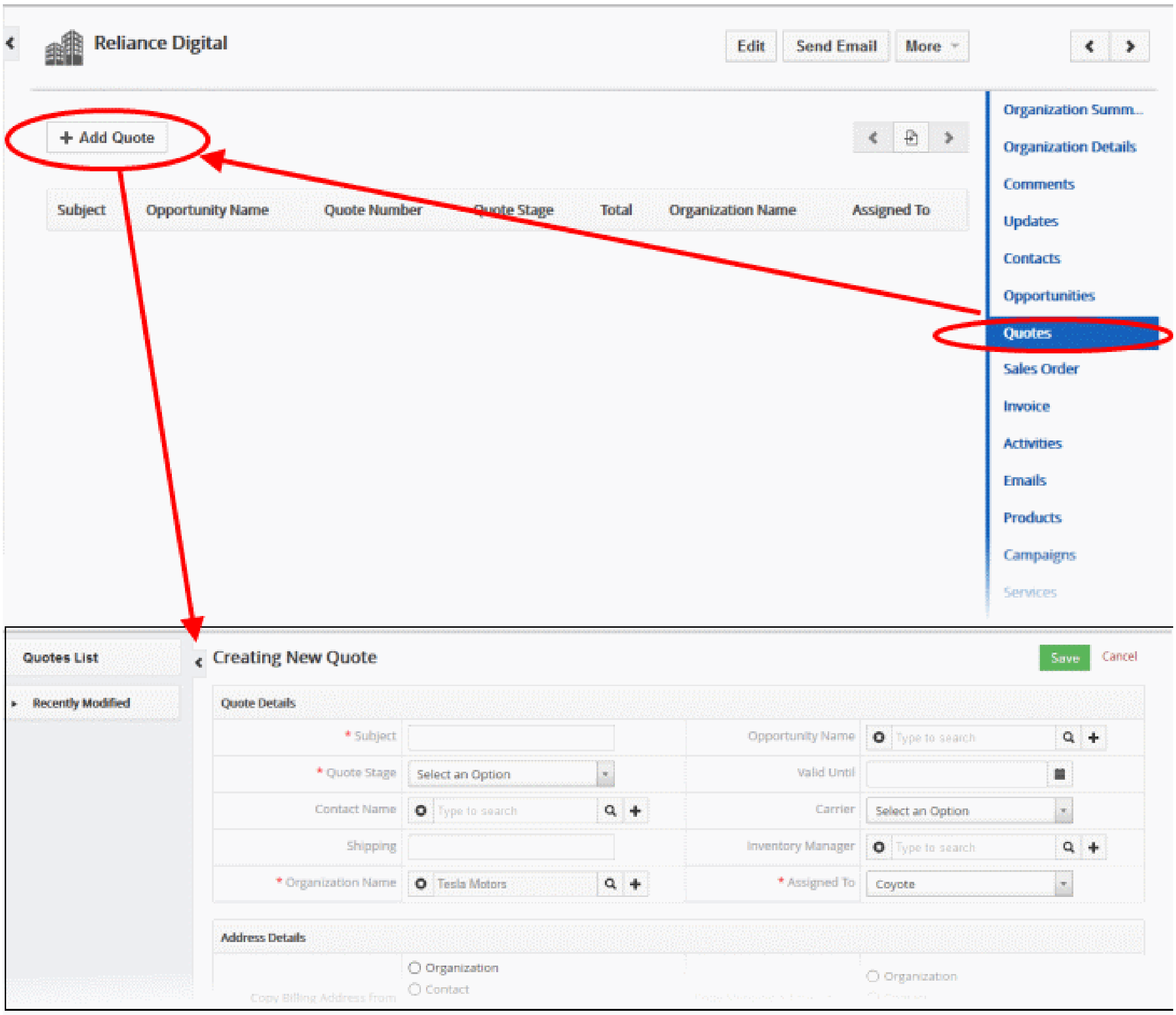
Please note that a 'Product' or a 'Service' module will always be associated to a quote by default as a 'Quote' is created for a product sold.

To create a quote from other modules

The example below describes how to view and manage the 'Quotes' records associated with an organization record. A similar process can be followed to associate other module types.

- Click 'All' > 'Organization'

- Click on an organization record in the list then click 'Quotes' on the right
- Click the '+ Add Quote' button.



Note: If you have added quotes to this organization earlier, then it will be listed in this interface.

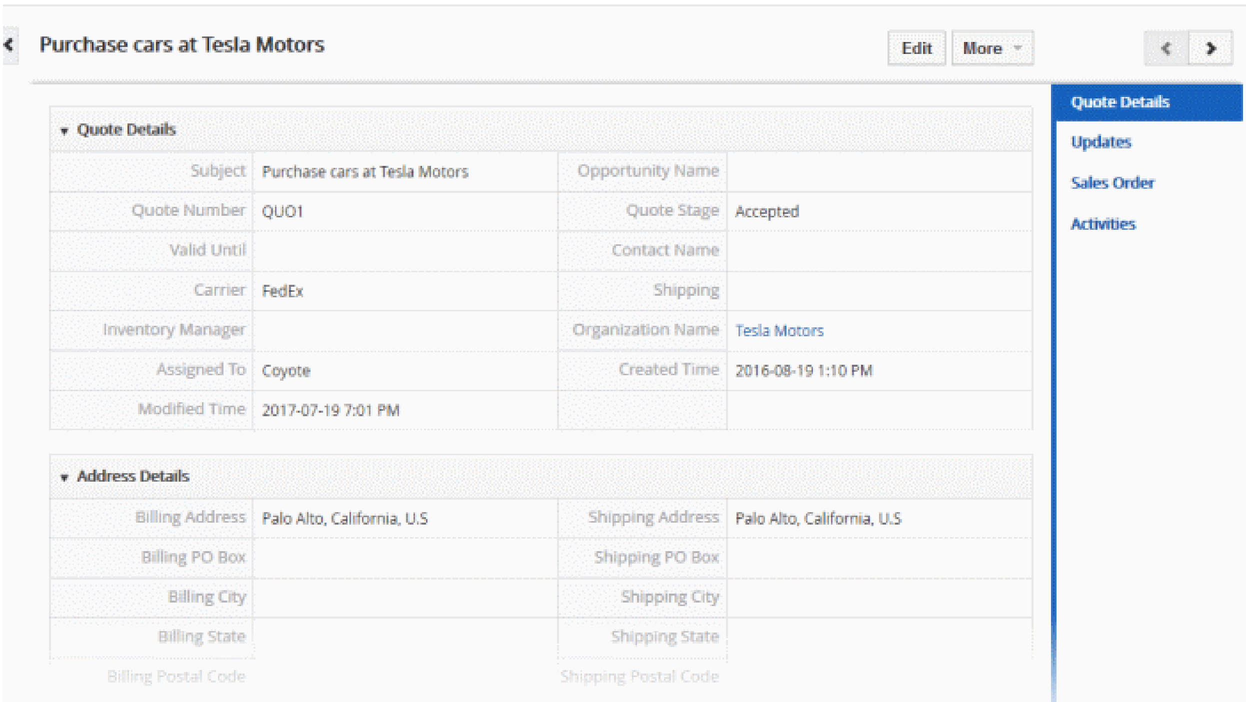
- Enter the 'Subject' and 'Product' fields (Other mandatory fields will be populated) and click 'Save'

The quote record will be added to the 'Quotes' interface associated with the organization record.

Generate a Sales record from a quote

To view, add and manage associated records:

- Click 'All' > 'Quote'
- Click any quote to open its detail page



The menu on the right shows modules that can be associated with a quote. Click on the 'Sales Order' links to view quote records that have already been associated with a sales order.

You can associate following options with quotes:

- Quote Details - View existing summary information of the quote data, activities, updates and sales order details
- Updates - View the modifications done on the quote record
- Sales Order - Create a new sales order and associate with the quote record
- Activities - Schedule meetings, calls and To-dos on the quote record

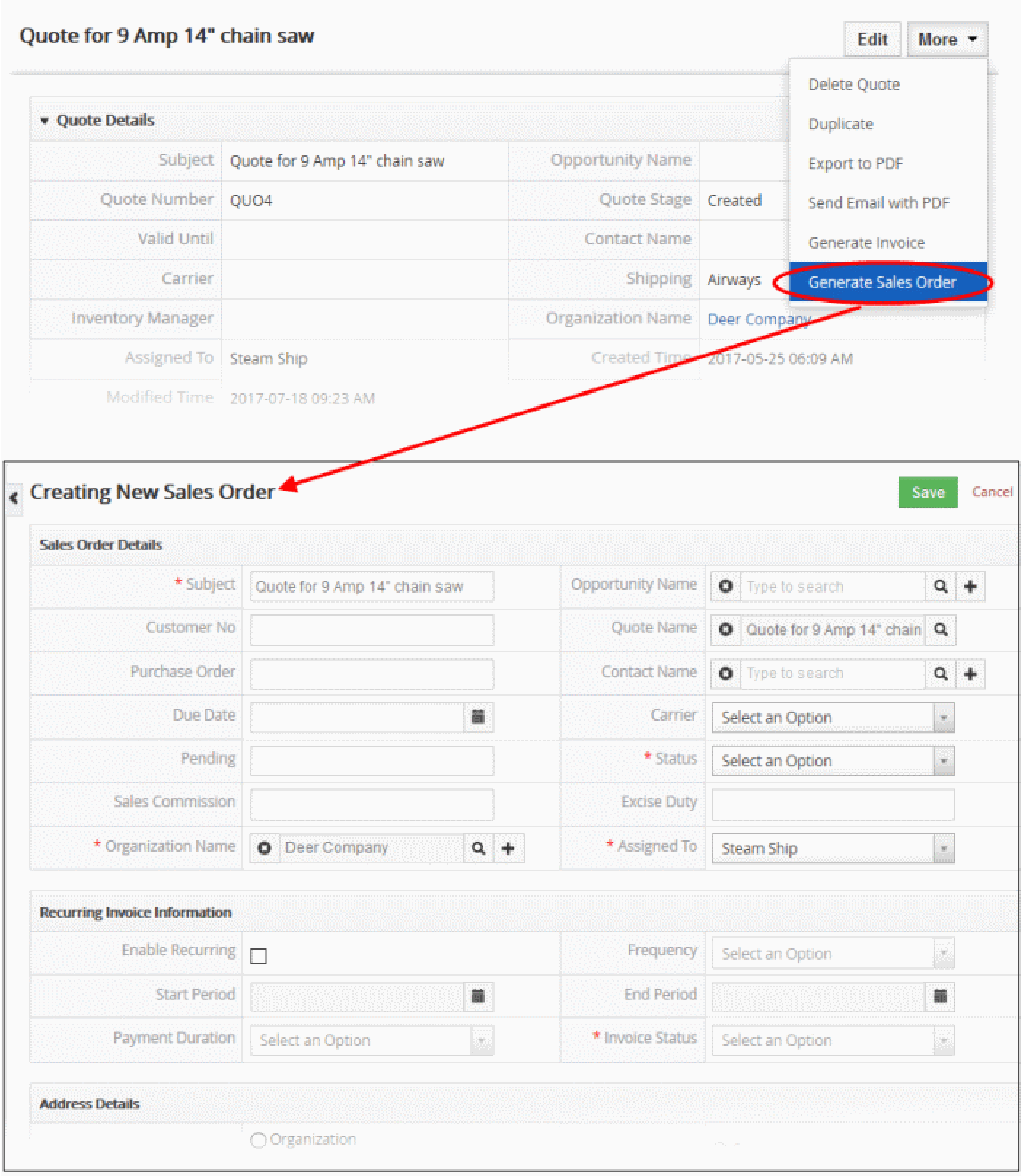
There are two ways to generate a sales order from a quote:

- From the 'Quotes' interface:
  - Click 'All' > 'Quotes' to open the quotes interface
  - Open a quote then click the 'Sales Order' link on the right.
  - Click 'More' > 'Generate Sales Order'. Click 'Save' when you have completed the form.
  - The new sales order will be associated with the quote.
- From the 'Sales Order Interface':
  - Click 'All' > 'Sales Order' to open the sales order interface
  - Click 'Add Sales Order' OR open an existing sales order and click 'Edit'
  - Use the 'Quote Name' field in the new/edit quote interface to select an existing sales order

The following sections explain these methods in greater detail:

To associate a sales order record to a quote record from the 'Quotes' module:

- Click 'All' > 'Quotes' (under 'Marketing and Sales') to open the 'Quote List' interface
- Select a quote record > Click 'More' and then choose 'Generate Sales Order'

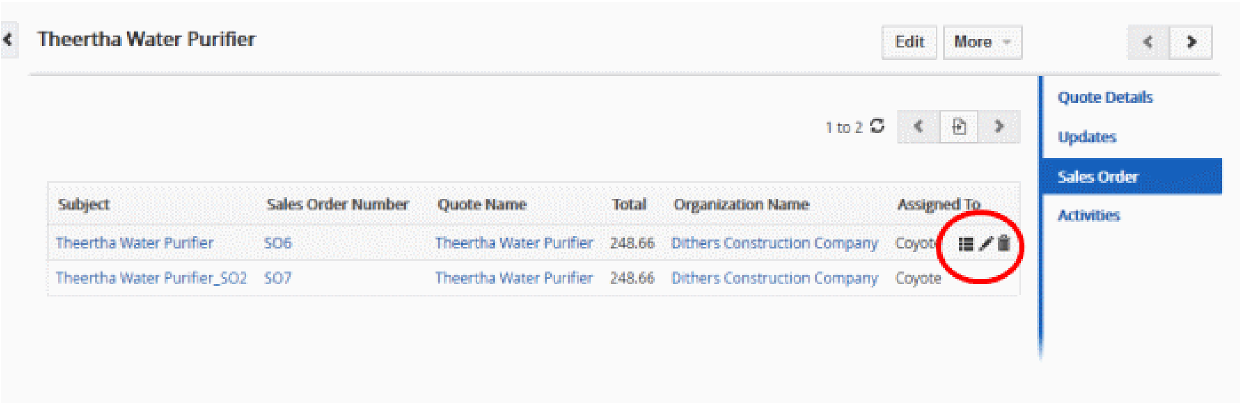


Please note that deleting this list will dissociate the sales order record from the quotes module but this record will remain in the 'Sales Order List' interface of the sales order module. See '**Manage Associated Sales Order**' to know how to delete an associated sales order record. In the same way you can associate a sales order record to a quote record from the 'Sales Order' module.

Manage Associated Sales Orders

You can view full details of a contact, edit a contact or dissociate a sales order from the associated sales order list.

- Mouse over a contact record to view the options at the far right end of the row



- Click the respective icon for the action you want to execute on the sales order.

  - Opens the sales order details interface of the respective sales order record. See the section **Add a Sales Order** for more details.

  - Allows you to edit the contact details. See the section **Add a Sales Order** for more details.

  - Removes the sales order record from the list of sales orders associated with the quote record.

3.6.4. Mass Management of Quotes

CRM allows you to edit, delete, import/export and de-duplicate multiple quotes simultaneously. This is useful, for example, should you need to update a specific detail which is common to a set of quotes.

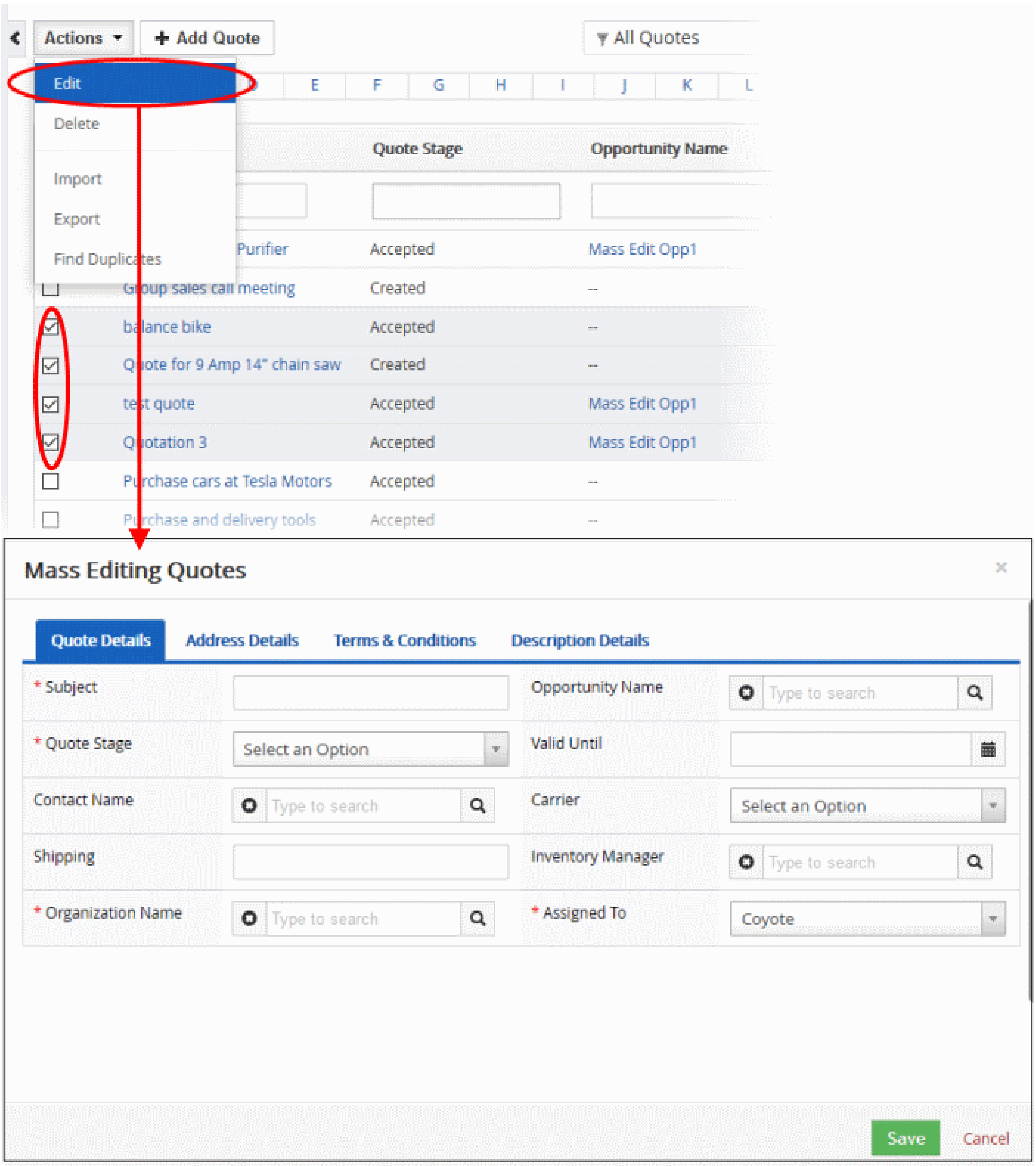
The interface allows you to:

- **Edit quote records**
- **Delete quote records**
- **Import and export quote records**
- **Find Duplicate quotes**

To edit common details of several quotes

- Click 'All' > 'Quotes' (under 'Marketing and Sales') to open the 'Quotes List' interface
- Select the leads to be edited
- Click 'Actions' and choose 'Edit'

The 'Mass Editing Quotes' pop-up will appear



- **Quote Details -** Allows you to create or edit values which will be common to all selected quotes. For example, you may want to implement the same quote stage on different quotes.
- **Address Details -** Specify common billing and shipping addresses for all selected quotes.
- **Terms & Conditions -** Specify a common set of terms and conditions for the selected quotes.
- **Description Details -** Create a common description for all quotes.

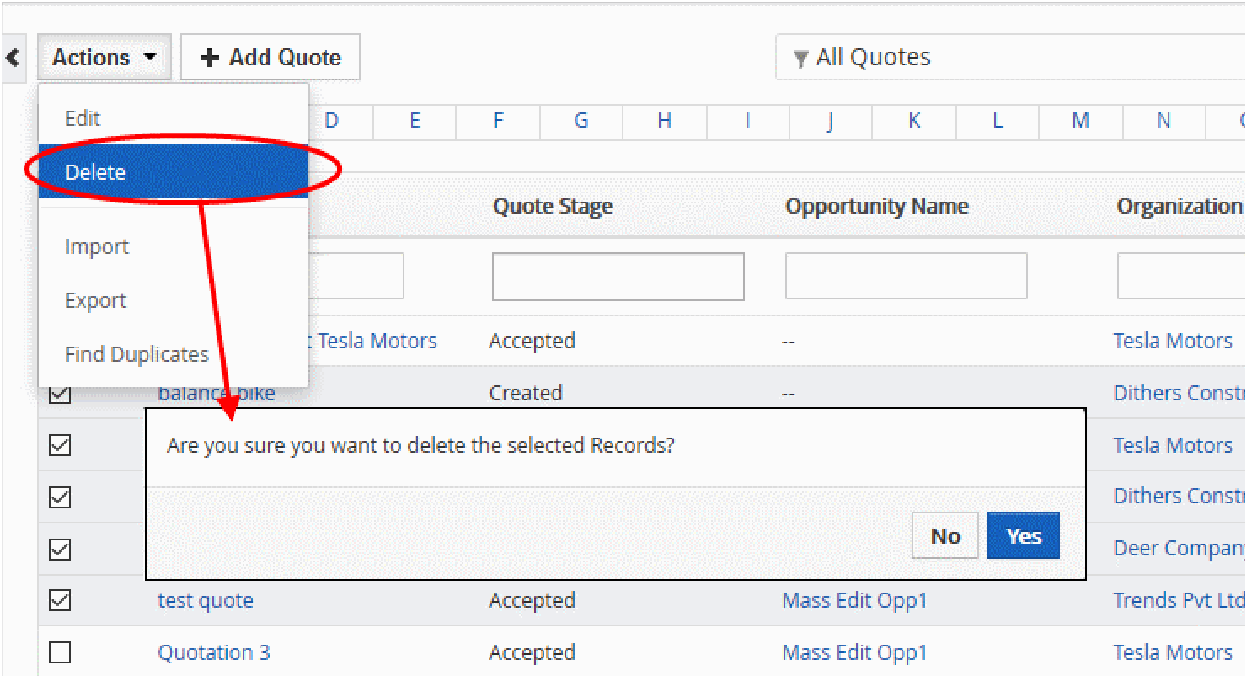
Delete Quote Records

Records for the quote that are no longer required can be removed.

To remove quote records:

- Click 'All' > 'Quote' (under 'Marketing and Sales') to open the 'Quotes List' interface

- Select the Quote(s) to be deleted
- Click 'Actions' and choose 'Delete' button.



- Click 'Yes' in the confirmation dialog to remove the record(s)

Import / Export Quotes Records

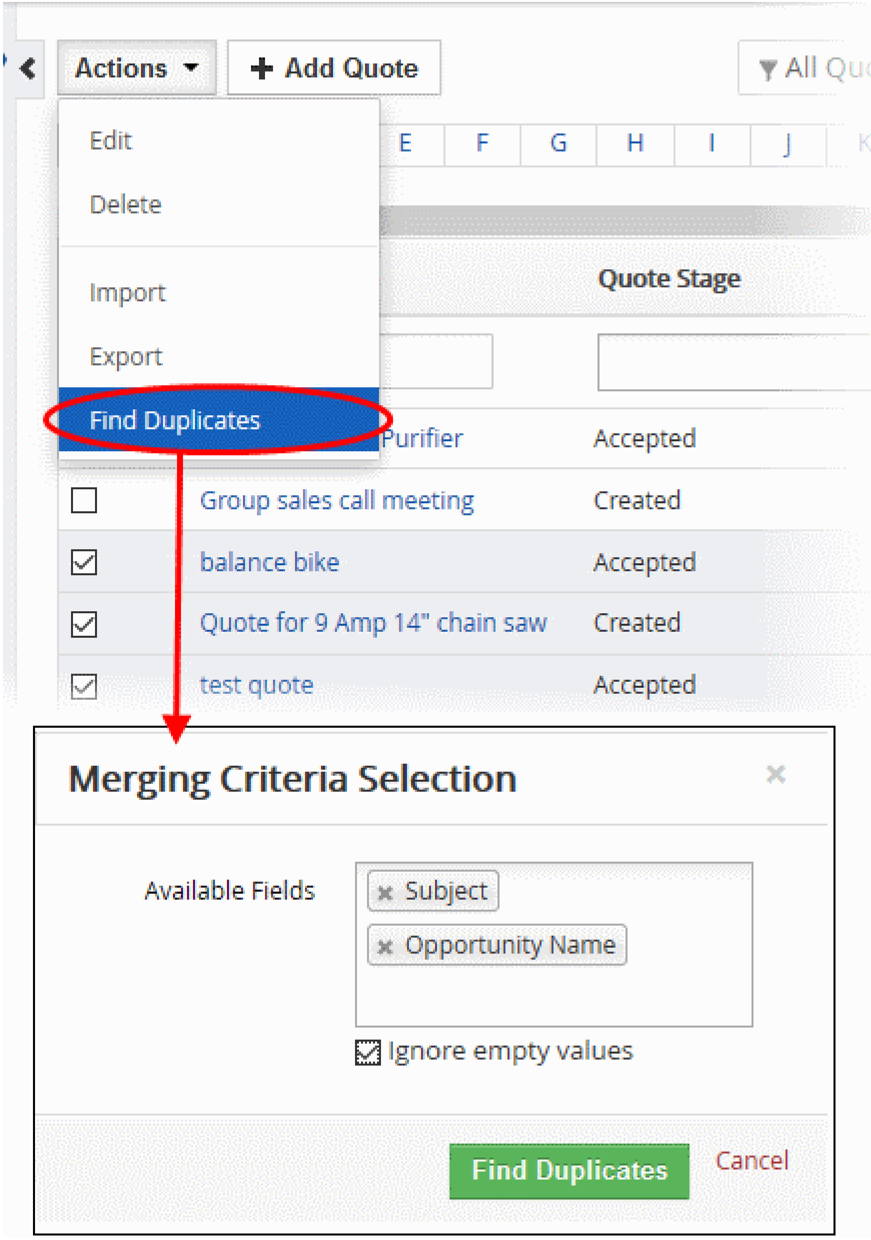
You can import saved records and export quote records from this interface. See '**Import and Export Records**' for more information.

Find Duplicates

You can eliminate duplicate records from multiple quote records at once.

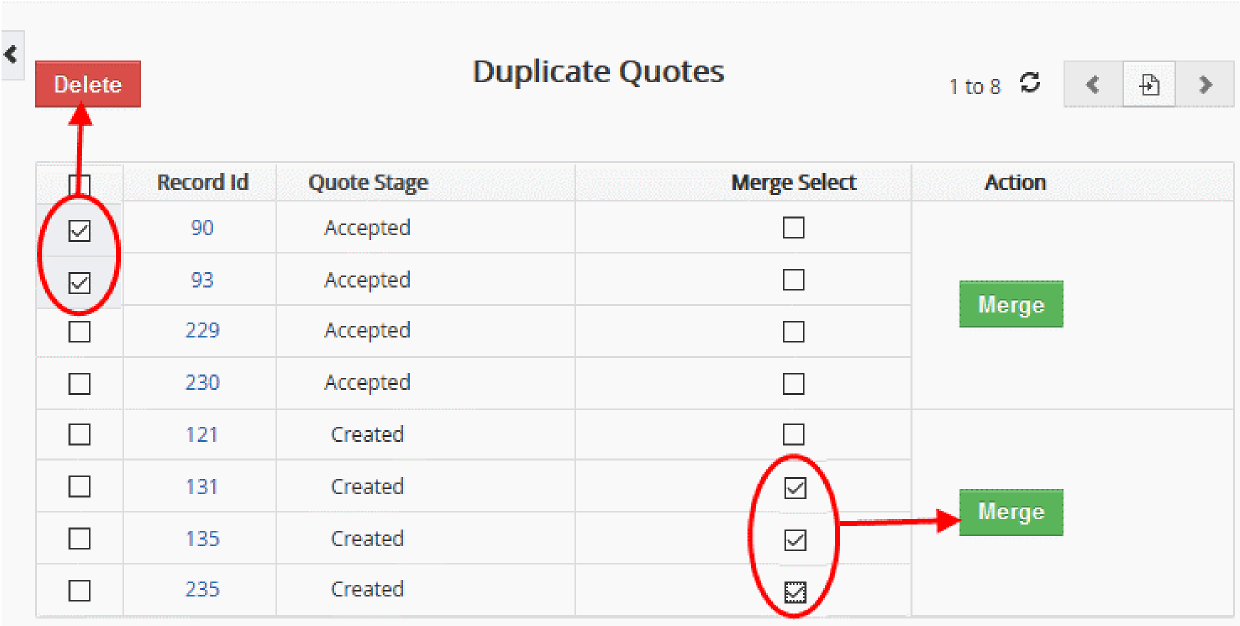
To find duplicate opportunities records:

- Click 'All' > 'Quote' (under 'Marketing and Sales') to open the 'Quotes List' interface
- Click 'Actions' and choose 'Find Duplicates'



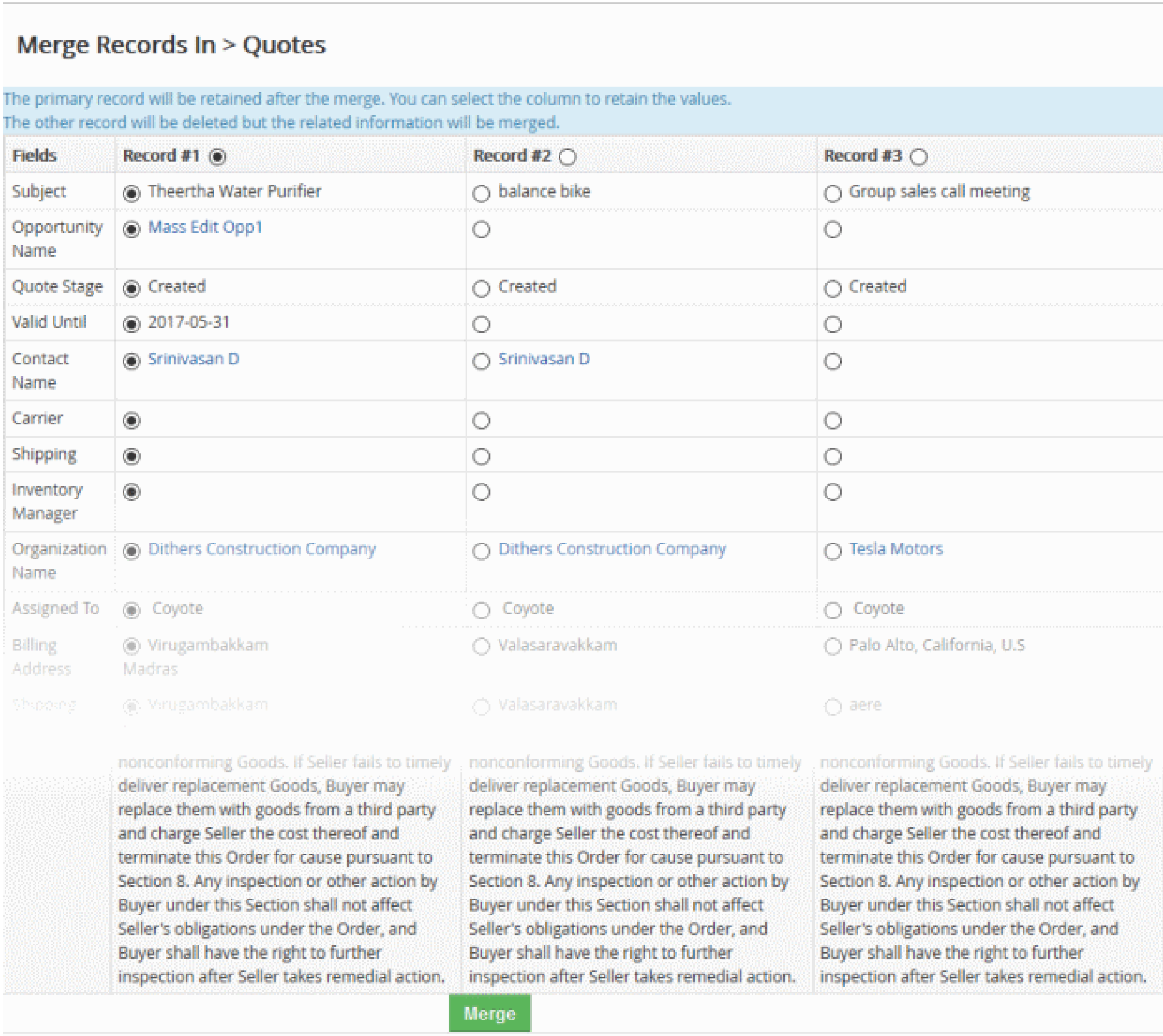
- Click in the 'Available Fields' box and choose the quotes related fields from the drop down. 'Ignore empty values' means the CRM will not consider matching blank fields as indicating a duplicate.
- Click 'Find Duplicates'

The 'Duplicate Quotes' page will be displayed.



- To delete a duplicate quote record, select it and click the delete button on the top left.
- To merge duplicate records, select them in the 'Merge Select' rows and click 'Merge'

The 'Merge Records In > Quotes' dialog will be displayed:



- Select the column values that should be retained in the merged record. Please note you can select only one column value for the merged record.
- Click 'Merge'. The records will be merged and displayed in the 'Quotes List' page as per the selected column values.

3.7. Invoices

An invoice, or a bill, is a non-negotiable itemized statement issued by the vendor to the customer. Invoices are usually issued just prior to the goods or services shipment.

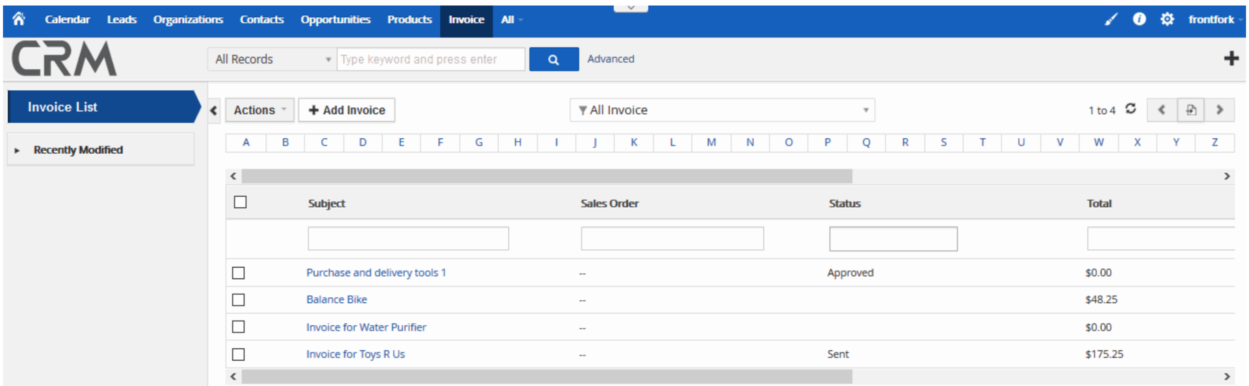
Invoices usually contain the products or services, prices and taxes, dates, parties involved, address information, terms and discounts, and payment methods.

To open the 'Invoice' interface:

- Click the 'Invoice' button on the top navigation

  OR

- Click 'All' > 'Invoice'



Left-hand menu:

- 'Invoice List' shows all invoices added to the CRM. Click any invoice to open its details page.
- The 'Recently Modified' tab lists invoices which were recently updated.

Invoices - Column Descriptions	
Column Header	**Description**
Subject	The name of the invoice.
Sales Order	The sales order linked to the invoice.
Status	Status of the invoice. You can change the status by opening the invoice then clicking 'Edit'.
Total	Value of the invoice.
Assigned To	Staff member responsible for the invoice.

- Click any column header to sort the table according to the items in the column.
- To search for a specific item, enter the search criteria in the respective column header(s) and click 'Search' at the right end of the column header.
- For more details on advanced filter options, see '**Custom Views**'.

Custom Filter View

- The 'Invoice' interface allows you to create custom views. For example, you may want to view only those opportunities assigned to you, and only view selected columns like invoice name, sales stage or customer number.
- You can create any number of views, and can make any view your default. See '**Custom Views**' for more details.

The following sections explain more about:

- **Create an Invoice**
- **Manage Invoices**
- **Associate Asset Records to an Invoice**
- **Mass Management of Invoices**

3.7.1. Create an Invoice

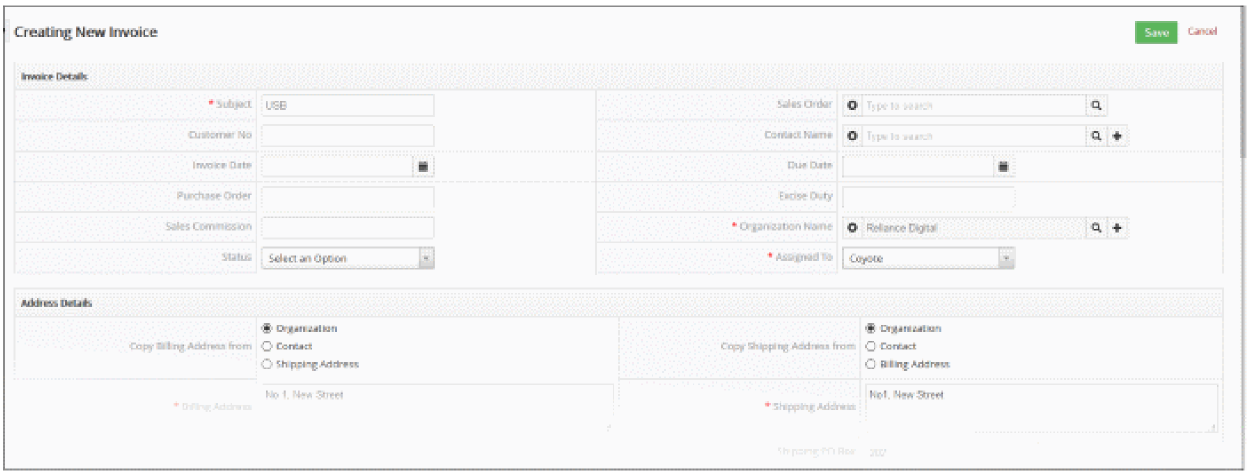
When a customer places an order, you can create an invoice to bill them for the upcoming sale.

There are four possible ways to create an invoice:

- Create a new invoice - Click 'All' > 'Invoice' > 'Add Invoice'. See '**Create a New Invoice**' for more information.
- Clone an invoice - Duplicate an existing invoice to use as the starting point of a new invoice. See '**Clone an Invoice**' for more information.
- Import invoices - Import a list of invoice records from a .csv or .vcf file. See '**Import Invoices**' for details.
- Create an invoice from within another module (products, organizations, contacts etc). See '**Create an Invoice from other Modules**' for more information.

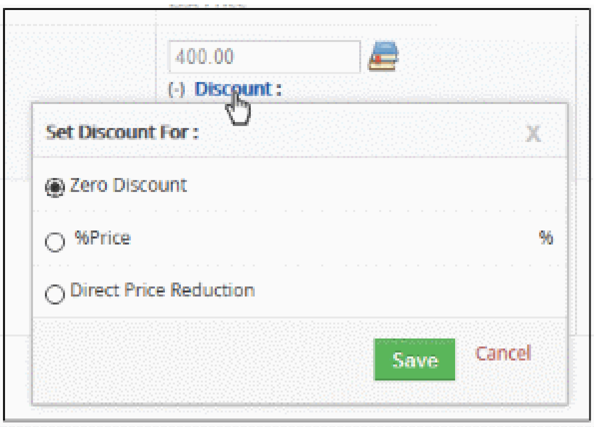
Create a New Invoice

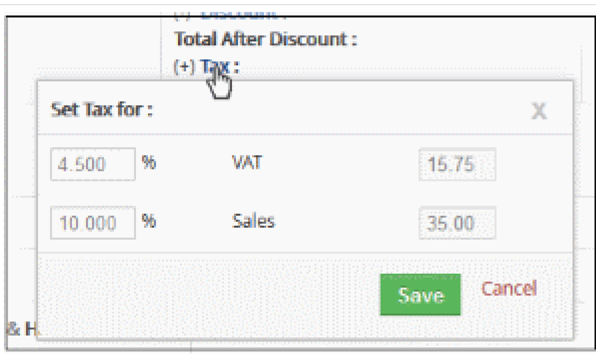
- Click 'All' then 'Invoice' (under 'Marketing and Sales'), or click 'Invoice' on the title bar
- Click the 'Add Invoice' button
- The 'Create New Invoice' page will open:



Create New Invoice - Form Parameters	
Form Parameter	**Description**
Invoice Details	
Subject	Specify the name of the invoice.
Sales Order	Select the reference Sales order (if any), or click the search icon to populate a value automatically.
Customer No.	Enter the customer number, if any.
Contact Name	Specify the contact for whom you are creating the invoice. Click the search icon to select from a list of existing contacts. Click the '+' icon to quick create a new contact.
Invoice Date	Specify the date that the invoice was created.
Due Date	Select the date by which payment should be received for the items in the invoice.
Purchase Order	Enter the purchase order number, if any.
Excise Duty	Duty rate for the shipment.
Sales Commission	Enter the amount of commission paid to the salesperson responsible for the deal. Enter a figure, not percentages. Commissions will be in the currency set for your company. This figure will not be shown in the exported invoice pdf.
Organization Name	Select the organization to whom the invoice will be sent. You can click the '+' icon to quick create a new organization or click the search icon to select an existing organization.
Status	Select the invoice status from the drop down. You can change the status later on using the 'Edit' option.
Assigned To	Select the staff member who is responsible for the invoice. This may be the same staff member handling the opportunity.
Address Details	
Copy Billing Address from	Choose whether to copy the billing address from the organization, contact or shipping address.
Copy Shipping Address	Choose whether to copy the shipping address from the organization, contact or billing address.
Billing Address and other fields. • Address • PO Box • City • State • Code • Country	This will be auto populated as per the 'Copy Billing Address from' option. Specify the details if not populated.
Shipping Address and other fields. • Address • PO Box	This will be auto populated as per the 'Copy Shipping Address from' option. Specify the details if not populated.

• City • State • Code • Country	
Terms & Conditions	
Specify the terms and conditions that are associated with the invoice.	
Description Details	
Description	Enter a description of the invoice. This will be visible in the final invoice.
Item Details	
Lets you add products/services, manage prices/taxes and offer discounts.	
Item Name	• Type the name of the product you wish to add. Matching items will automatically shown as suggestions. • Alternatively, click the product / services icon and select the product / select from the pop-up screen.
Tools	• Click the trash can icon to remove the product / service. • Click and drag a product to re-position it in the list.
Add Product / Add Service	Allows you to add a product / service to the invoice.
Currency	
Currency	Select the currency for the invoice. You can add and manage new currencies in 'CRM Settings' > 'Other Settings' > '**Currencies**'.
Quantity	For each product / service, a corresponding quantity / list price fields will be available. • Specify the quantity for which the invoice has to be generated

List Price	The defined price for the **product**. You can change the price by manually entering an amount or selecting from the **Price Book**..
	• Click the '**Discount**' link to offer discounts on the List Price.
	
	  • Select '%Price' to provide discount by percentage
	  • Select 'Direct Price Reduction' to provide flat discount on price.
	• Click 'Tax' link to change the tax structure. Please note this will be available for 'Individual' tax mode.

	 • Enter the new applicable tax(es)
Tax Mode	
Individual	If this option is selected, the 'Tax' link will be displayed allowing you to edit the individual tax rate defined for the **product**.
Group	If this option is selected, all the taxes that are enabled for the **product** will be applicable and you cannot edit the rates here.
Total	Displays the price details for the product including discount and taxes
Net Price	Displays the total price of the product

- Items Total - The final price of the all the products.
- Discount - Click 'Discount' to specify the discount for the total price.
- Shipping & Handling - Specify the charges for shipping the product to the customer.
- Pre Tax Total - Displays the total price including shipping charges.
- Taxes for Shipping and Handling - Displays the taxes defined for shipping and handling in 'CRM Settings' > 'Other Settings' > '**Tax Calculations**'. You can change the tax structure on an ad-hoc basis by clicking the 'Taxes for Shipping and Handling' link.
- Adjustments - Select 'Add' or 'Deduct' appropriately and enter the amount to round off the invoice amount.

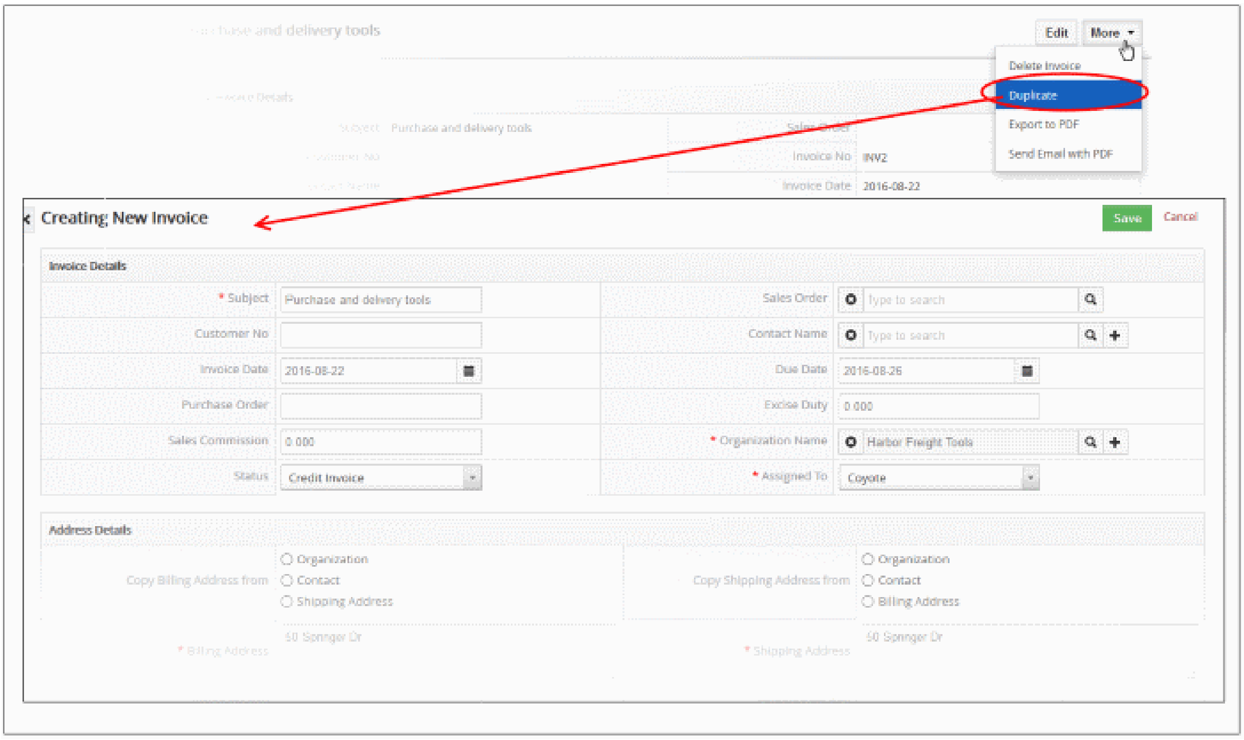
Click 'Save'. The invoice will be saved and added to the list in the 'Invoice List'

Clone an Invoice

CRM allows you to create a new invoice record using an existing record as a template. You can then edit the cloned record as required.

To clone an invoice record

- Click 'All' on the title bar and choose 'Invoice' under 'Marketing and Sales' to open the 'Invoice List' interface
- Click the name of the invoice record you want to clone to open the the 'Invoice Details' interface
- Click 'More' on the top right and choose 'Duplicate'



The 'Creating New Invoice' form will open with the details populated from the original record.

- Enter a details for the new invoice
- Edit the details as required. Descriptions of the form parameters are available in the **table above**.
- Click 'Save'.

Import Invoices

Another method of creating an invoice is to import from exported invoices.

To import invoices

- Click 'All' on the title bar and choose 'Invoice' under 'Marketing and Sales' to open the 'Invoice List' interface
- Click 'Actions' > 'Import'

Follow the steps in the interface to import the desired invoice. See '**Import and Export Records**' for more information.

Create an Invoice from other Modules

You can also create new invoices from other modules. For example you can create an invoice from a particular sales record. See '**Associate Invoice Records to a Sales Order**' for more information.

3.7.2. Manage Invoices

- The 'Invoice List' interface lets you view and update invoice details, including contact information, industry, assigned staff member and more.
- You can also schedule 'To Do' activities for the invoice from this interface. The activities will be reflected in the calendars of team members assigned to the invoice.
- You can associate assets records to an invoice from here.
- You can also send emails of the invoice in pdf format.

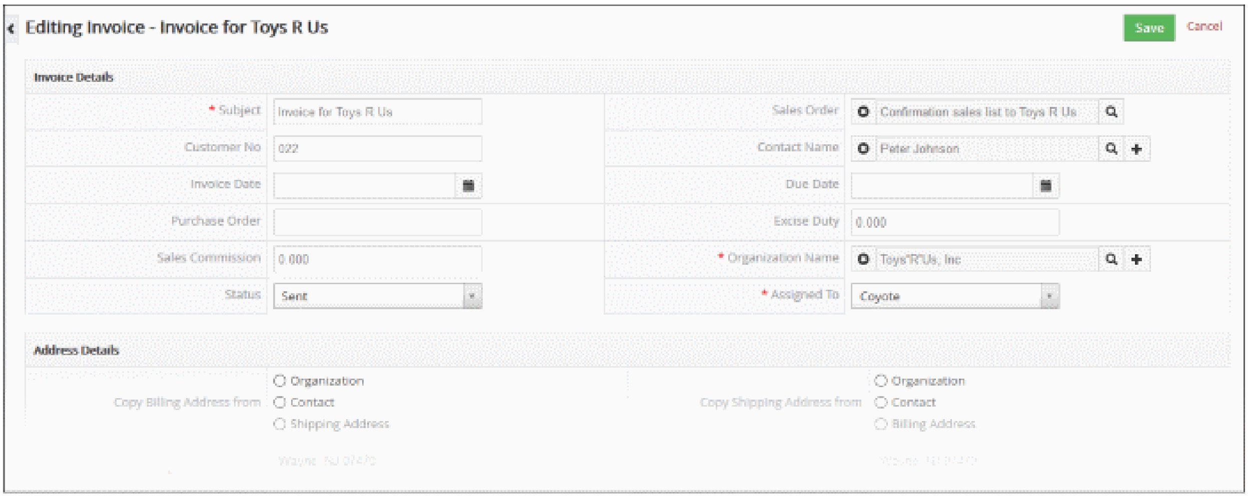
To view invoice details:

- Click 'All' > 'Invoice' to open the 'Invoice List' interface

- Click on an invoice to open its details page

To edit an invoice:

- Click 'All' > 'Invoice' to open the 'Invoice List' interface
- Click on a invoice's name and then the 'Edit' button at the top right of the 'Invoice Details' interface.
  OR
- Click 'All' > 'Invoice' to open the 'Invoice List' interface
- Place your mouse cursor over the name of an invoice to reveal the action buttons on the right of the row.
- Click the 'pencil' icon to open the invoice edit interface:



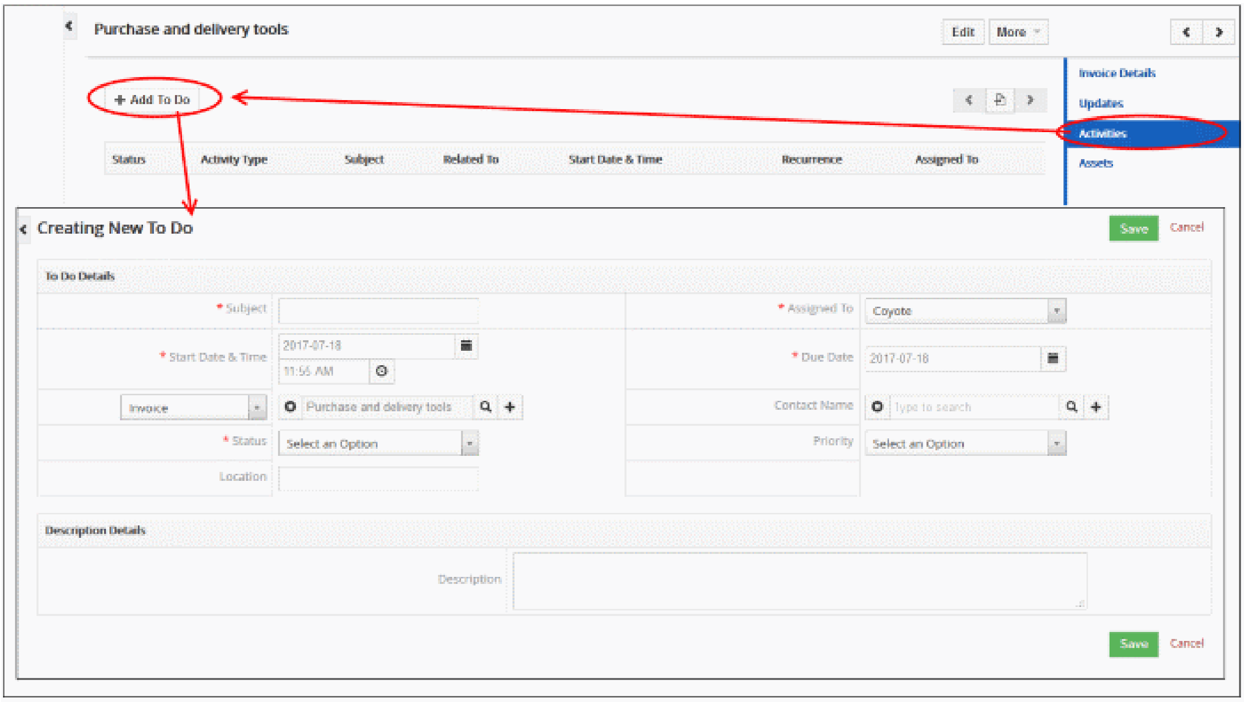
- See **this table** for descriptions of the fields in the 'Invoice Details' interface

Activities

Activities in an invoice module consist of 'To Dos' (product delivery, purchase etc). Administrators can add 'Activities' to an invoice and these will be added to the CRM calendar. Activities can be viewed by administrators and staff members to whom the invoice is assigned. Assigned staff and administrators can add a 'To Do' as an activity of an invoice record.

To create a 'To Do' activity :

- Click 'All' > 'Invoice' to open the 'Invoice List' interface
- Click on an invoice to open the invoice details interface
- Click 'Activities' from the menu on the right
- Click '+ Add To Do' in the activities interface.



The 'Creating New To Do' screen will be displayed:

- Enter the required details and click 'Save'.

See '**Manage Shared Calendar**' for more details on the 'Event/To Do' full form.

3.7.3. Associate Asset Records to an Invoice

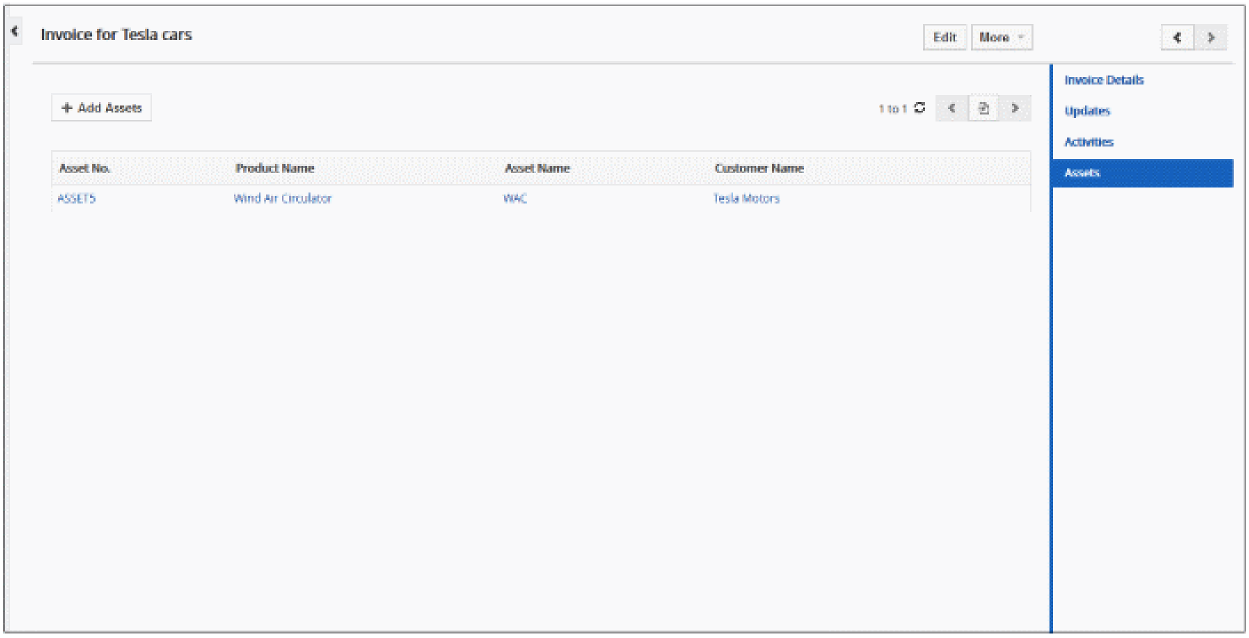
If you deliver goods which require special follow up services then 'Assets' allow you track serial numbers and other product attributes. Each asset is associated with a product sale and includes items such as date of sale, the name of the staff whom closed the sale, whether the product is still in service or not, invoice name of the sale and more. This helps support staff to keep track of sales and resolve any problem that may arise in the future.

To view, add and manage asset records:

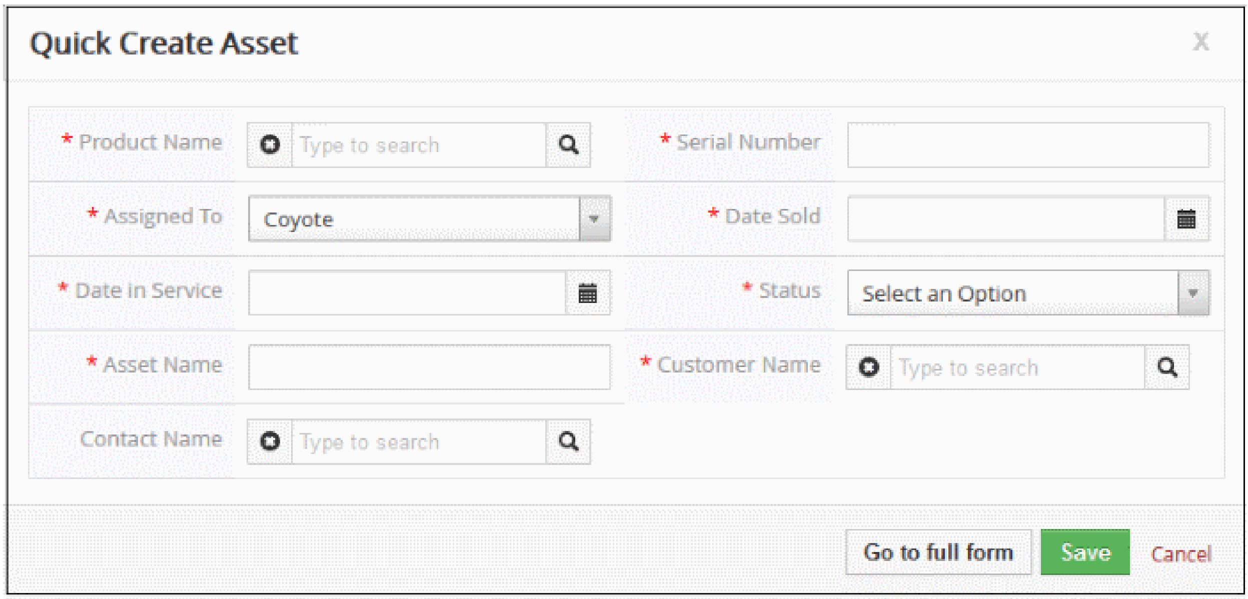
- Click 'All' > 'Invoice'
- Click any invoice to open its detail page
- You can associate an asset with an invoice by clicking the 'Asset' link in the right hand menu.

To add an asset to an invoice

- Click 'Assets' on the right
- This will display a list of assets that are already associated with the invoice. Note - You can also associate an invoice to an asset from the 'Assets' module also. Go to 'Assets' > 'Add Asset' and select the invoice in the 'Invoice Name' field.
- Click 'Add Assets' at the top left



The 'Quick Create Asset' dialog will appear:



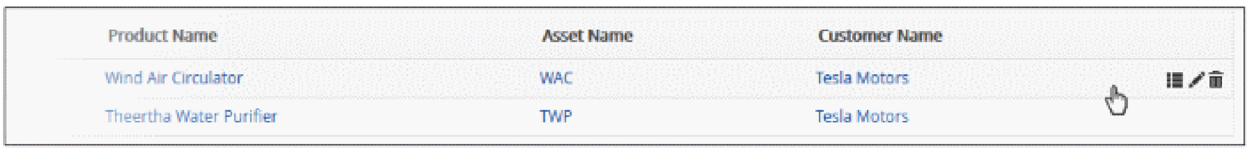
- Complete the details of the new asset and click 'Save'. The asset record will be added and will also be available in the '**Assets**' interface.

The information in the 'Quick Create Asset' dialog is basic in nature. Use the 'full form' if you want to enter more details for the asset.

Manage Associated Assets

The associated assets list lets you view and edit details, and dissociate assets.

- Mouse over an asset record to view the options at the far right end of the row



- The following options are available:

- Opens the asset details interface of the respective asset record. See '**Assets**' for more details.

- Allows you to edit the asset details. See '**Assets**' for more details.

- Removes the association between the asset and the invoice. Note, this doesn't remove the asset itself, which will remain available in the '**Assets**' module.

3.7.4. Mass Management of Invoices

You can edit/import to/export/de-duplicate several invoice records at once. This is useful when you are updating or altering details that are common to a set of invoice records. For example, you may have several invoices that are assigned to different staff members but would like to reassign them to a single person.

Tip: If you want to update the details of a *single* invoice record:

- Open the 'Invoice List', click the invoice name then click the 'Edit' button.
- See '**Manage Invoices**' for more details.

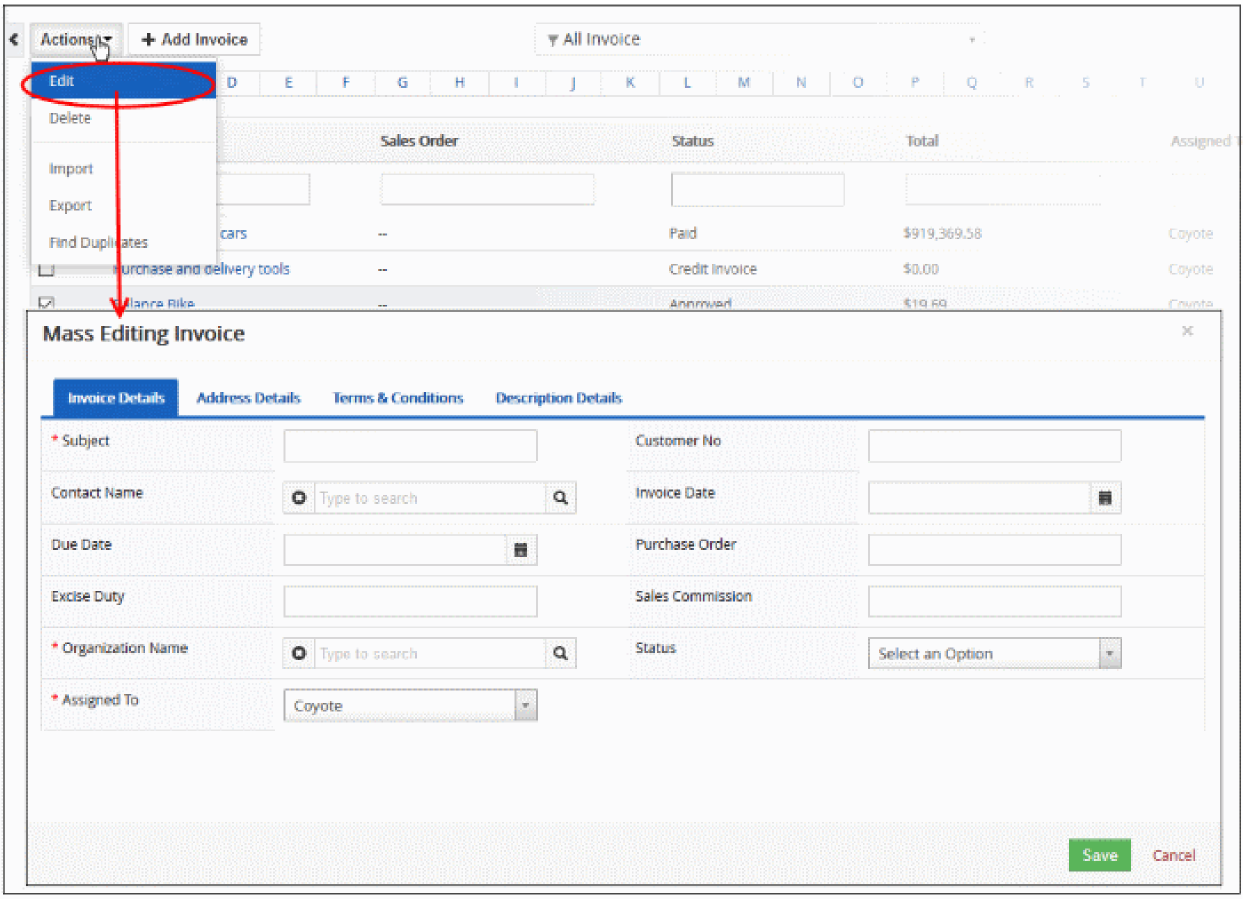
The interface allows you to:

- **Edit invoice records**
- **Delete invoice records**
- **Import / export invoice records**
- **Find duplicates**

To edit common details of several invoices

- Click 'All' > 'Invoice' (under 'Marketing and Sales') to open the 'invoice List' interface
- Select the invoices to be edited
- Click 'Actions' and choose 'Edit'

The 'Mass Editing Invoice' pop-up will appear:



This interface contains four tabs:

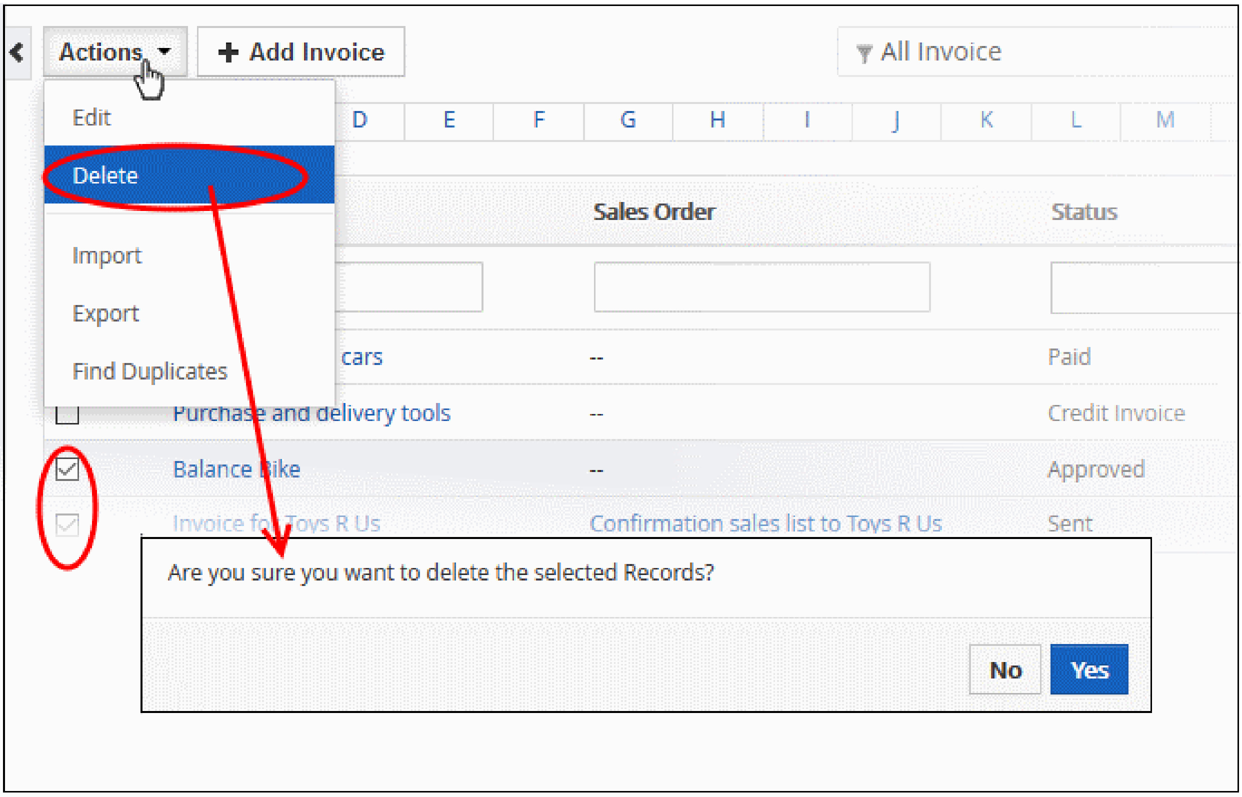
- Invoice Details - Allows you to specify subject, contract name and more. See **this table** for descriptions of the fields in the 'Invoice Details' tab.
- Address Details - Allows you to enter the values for billing and shipping addresses. See **this table** for descriptions of the fields in the 'Address Details' tab.
- Terms & Conditions - Allows you to provide a common 'Terms & Conditions' for the selected invoices.
- Description Details - Allows you to enter a common description for the selected invoices.

Click 'Save'.

To delete invoice records

Invoice records that are no longer required can be removed.

- Click 'All' > 'Invoice' (under 'Marketing and Sales') to open the 'Invoice List' interface
- Select the invoices to be deleted
- Click 'Actions' and choose 'Delete' button.



- Click 'Yes' in the confirmation dialog to remove the record(s)

To import / export Invoice Records

Export:

- Click 'All' > 'Invoice'
- (Optional) Select the invoices you wish to export
- Click 'Actions' > 'Export'
- Choose whether to export selected records, all visible records or all records
- Click 'Export Invoice'.
- Invoices are exported in .csv format

Import:

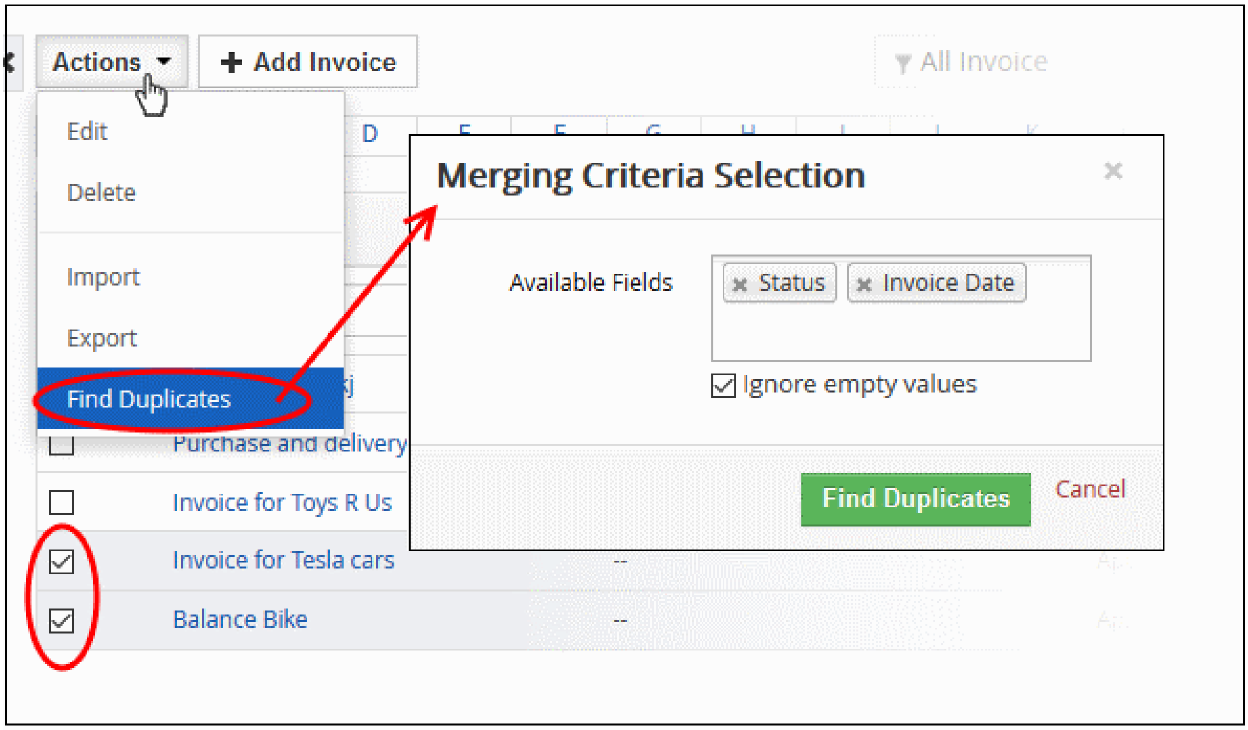
- Click 'All' > 'Invoice'
- Click 'Actions' > 'Import'
- Browse to the file containing your invoice records
- Specify the format of your file
- Click 'Next' to begin the import.

See '**Import and Export Records**' for more information.

To find duplicates

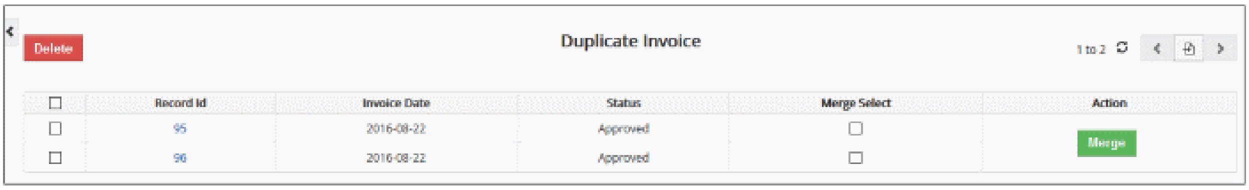
You can find duplicates from multiple invoice records at once.

- Click 'All' > 'Invoice' (under 'Marketing and Sales') to open the 'Invoice List' interface
- Click 'Actions' and choose 'Find Duplicates'

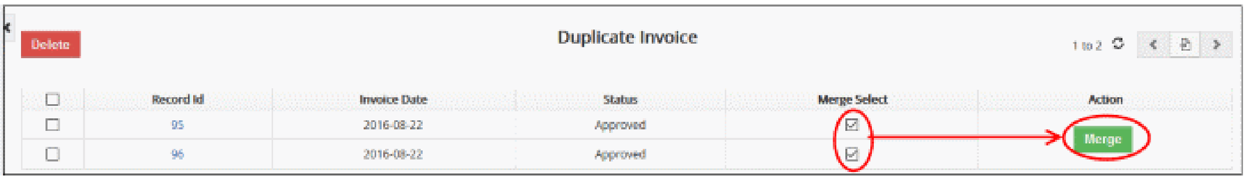


- Click in the 'Available Fields' box and choose the invoice related fields from the drop down. 'Ignore empty values' means the CRM will not consider matching blank fields as indicating a duplicate.
- Click 'Find Duplicates'

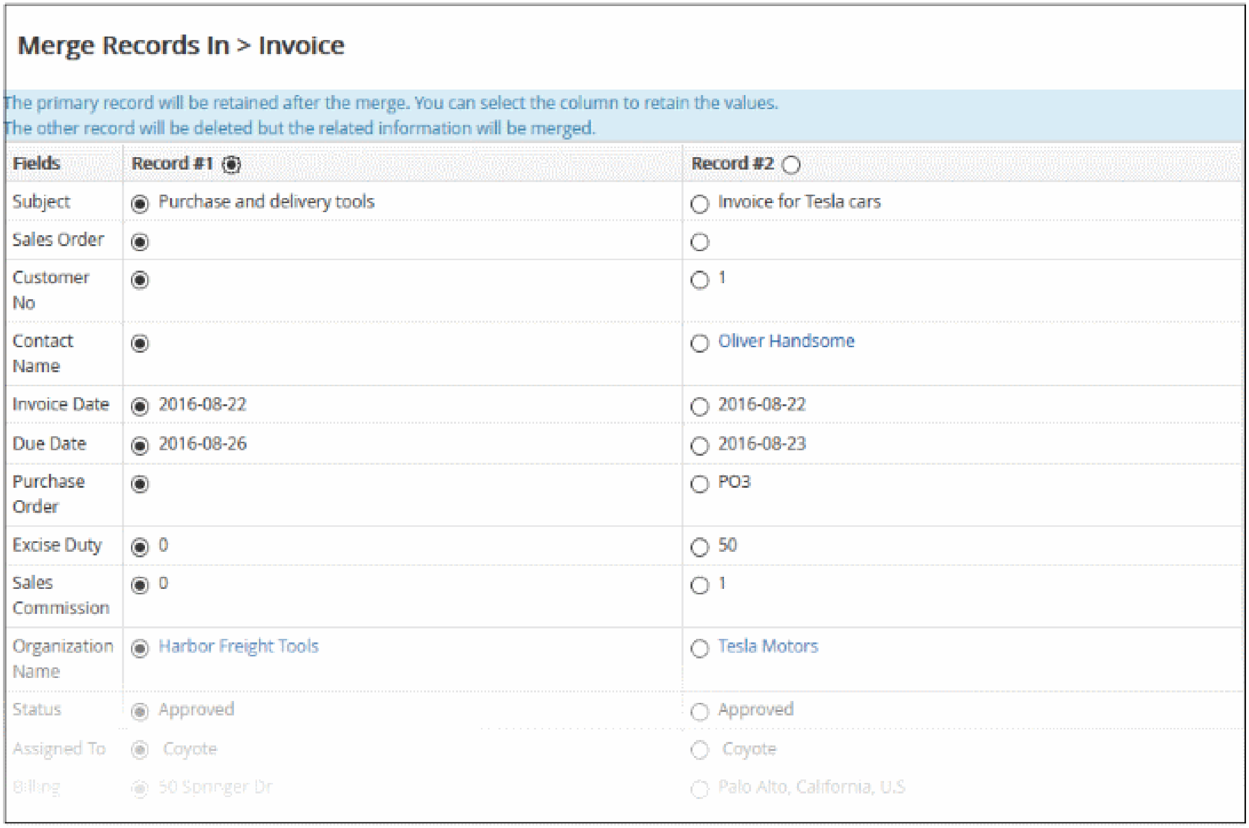
The 'Duplicate Invoice' page will be displayed.



- To delete a duplicate invoice record, select it and click the delete button on the top left.
- To merge duplicate records, select them in the 'Merge Select' rows and click 'Merge'



The 'Merge Records' dialog will be displayed:

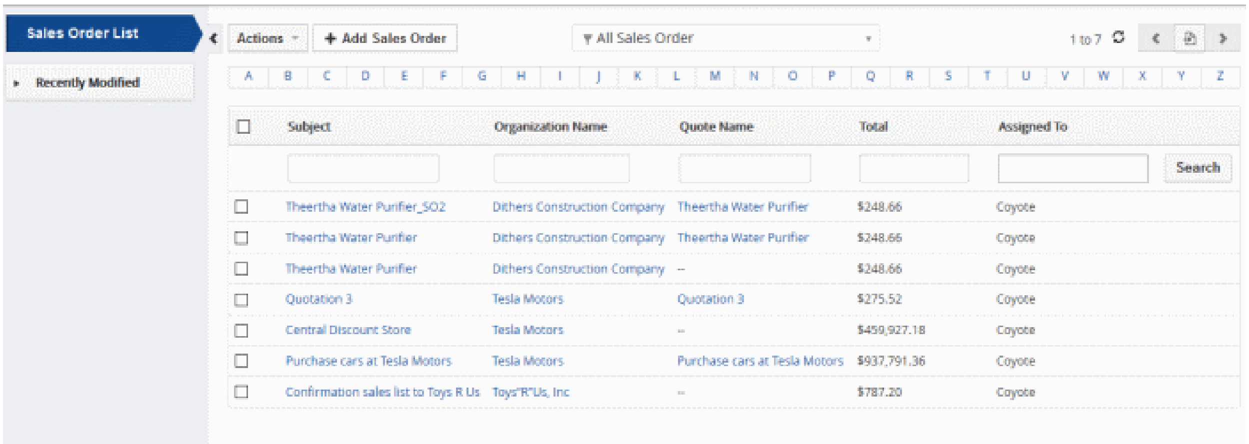


- The selected 'Record #' is the primary record. Select other record to change the primary record.
- Select the column values that should be retained in the merged primary record. Please note you can select only one column value for the merged record.
- Click 'Merge'. The records will be merged and displayed in the 'Invoice List' page as per the selected column values.

3.8. Sales Orders

Sales orders are internal documents generated after a purchase order has been received. They are used to help your sales team track all products and services should be manufactured, shipped to a customer. Sales orders can include a sales order number, purchase order, recurring invoices, billing and shipping addresses, included products, prices and taxes.

Sales orders as similar to quotes, but represent a confirmed sale. Sales orders are often sent to customers to confirm the sale.



- View existing Sales Orders - Click 'All' > 'Sales Order'
- Create new Sales Order - Click 'All' > 'Sales Order' > '+ Add Sales Order'
- Edit a Sales Order - Click 'All' > 'Sales Order' > open an existing sales order > 'Edit'
- Send a Sales Order - Click 'All' > 'Sales Order' > open an existing sales order > 'More' > 'Send Email with PDF'

The following sections explain how to create and manage sales orders:

- **Generate Sales Order**
- **Manage Sales Order**
- **Associate Records from other modules to a Sales Order**
- **Mass Management of Sales Records**

3.8.1. Add a Sales Order

- Click 'All' > 'Sales Order' to open the sales order interface.

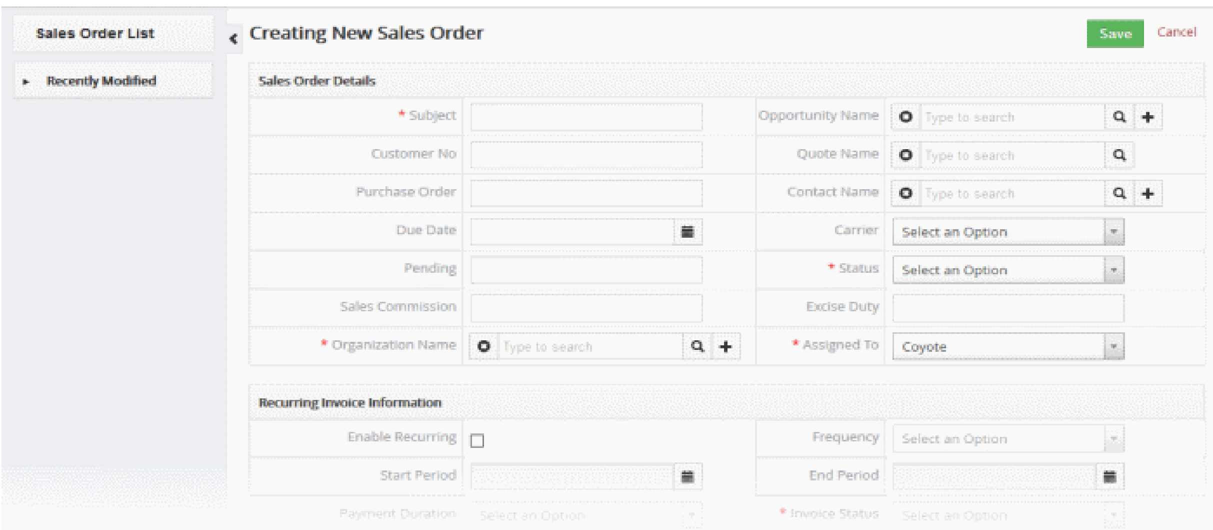
There are 4 ways to create a sales order:

- **Create a new sales record** - Setup a new sales order from scratch. See '**Create a New Sales Order Record**' for details.
- **Clone a sales record** - Duplicate an existing record and use it as a starting point to create a new record. See 'Clone a Sales Order' for details.
- **Create a quote from other modules** - You can create a sales order from the opportunities and invoice interfaces. Open one of these interfaces then open a specific record then click 'Sales Order' in the right hand menu. See **Associate Invoice Records to a Sales Order** to learn more.
- **Import Sales Orders records** - Bulk import sales orders from a .csv or .vcf file. See **Import and Export Records** for details.

Once a sales order has been created you can associate it with invoices and opportunities as required. See '**Associate Invoice Records to a Sales Order**' for more details.

Create a Sales Order Record

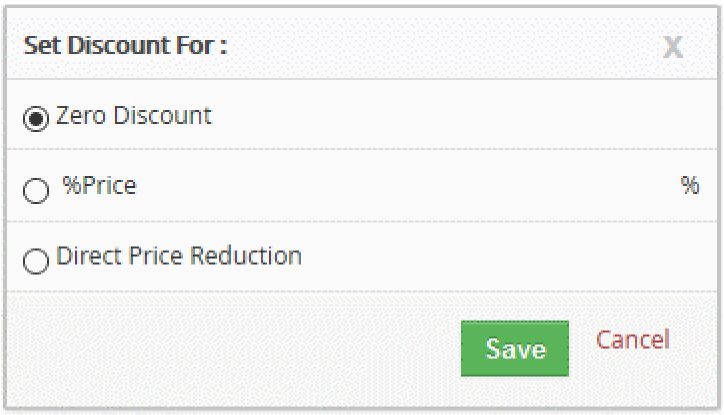
- Click 'All' then 'Sales Order' (under 'Marketing and Sales')
- Click the 'Creating New Sales Order' button



The 'Create New Quote' page will open. The interface lets you specify general quote details, organization name and product details for which you are tracking and following up the sales order

Create New Sales Order - Form Parameters	
Form Parameter	**Description**
Sales Order Details	
Subject	Specify a name of the sales order. This field is mandatory
Opportunity Name	Select the opportunity related to the quote • Click the search icon to select from a list of existing organizations • Create a new opportunity by clicking the '+' icon
Customer No	Enter the unique number used to identify the customer
Quote Name	Select the quote name for which you are creating and tracking sales order • Click the search icon to select from a list of existing contacts • Type first few letters of the quote name and select from the drop down
Purchase Order	Enter the associated purchase order received
Contact Name	Specify the contact for whom the quote was created (optional). • Click the search icon to select from a list of existing contacts • Create a new contact by clicking the '+' icon
Due Date	Select the due date for the sales order
Carrier	Select the name of the shipping company.
Pending	Enter the pending items to be shipped
Status	The different progressing stages of the sales order.
Sales Commission	Additional compensation for the staff member who successfully processed the sales order
Excise Duty	Duty rate for the shipment.
Organization Name	The customer company that the quote is for (mandatory field) • Click the search icon to select from a list of existing organizations • Create a new organization by clicking the '+' icon
Assigned To	Select the staff member responsible for the sales order. This can often be the same member of staff responsible for the quote, opportunity or organization related to the quote. This field is mandatory.
Recurring Invoice Information	
Enable Recurring	Allows users to use a Sales Order as template and generate Invoice from that SO regularly based on some frequency.
Frequency	Select the frequency of invoice recurrence from the drop-down: • Daily • Weekly • Monthly • Quarterly • Yearly
Start Period	Specify the date when the recurring invoice information will be started
End Period	Specify the date when the recurring invoice information will be stopped

Payment Duration	Choose the recurring payment duration from the drop down: • Net 30 days • Net 45 days • Net 60 days
Invoice Status	Select the status of the recurring invoice from the drop-down: • Auto Created • Created • Cancel • Approve • Sent • Credit Invoice • Paid
Address Details	
Copy Billing Address from	Choose whether to copy the billing address from the organization, contact or shipping address.
Copy Shipping Address	Choose whether to copy the shipping address from the organization, contact or billing address.
Billing Address	Billing address of the target organization.
Shipping Address	Shipping address of the target organization.
Description Details	
Description	Enter a description of the sales order for the target organization. This will be visible in the final sales order.
Item Details	
Currency	Choose the currency specified in the sales order. The currency is specified in the 'Grand Total' row of a sales order pdf. **Note**: CRM currencies are defined in the settings interface. Click the cog icon at top right to open the settings interface.
Tax Mode	Choose whether to apply group or individual product taxes • **Group**: Applies the tax rate defined in CRM settings to all products. The 'Tax' link will be displayed allowing you to edit the individual tax rate defined for the product. • **Individual**: Applies individual tax rates for each product. Product tax rates can be defined in each product's details page.
Tools	You can perform two actions using tools • - Delete the item • - Re-position the item to organize them in a specific order.
Quantity	Number of items in stock.
List Price	There are three ways to populate the list price:

	• Simply choose an item in the 'Item Name Field'. The list price will be auto-populated if a price has been defined in the product's details page.
	• Enter the price manually.
	• Select a price book which specifies a price for the product.
	• **Discount**
	  ◦ Click the 'Discount' link to offer discounts on the list price
	  ◦ Select 'Zero Discount' for no discount
	
	
	  ◦ Select '%Price' and enter a percentage discount
	  ◦ Select 'Direct Price Reduction' option and enter a discount amount

Total After Discount	Price after discounts are applied.
Add Product	Adds a new product item row to the quote. **Note**: You can add a product in two ways: • Enter the first three letters of the product name and select the product from the drop down menu • Click the product  icon and select an item from the product list.
Add Service	Adds a new service item row to the table.

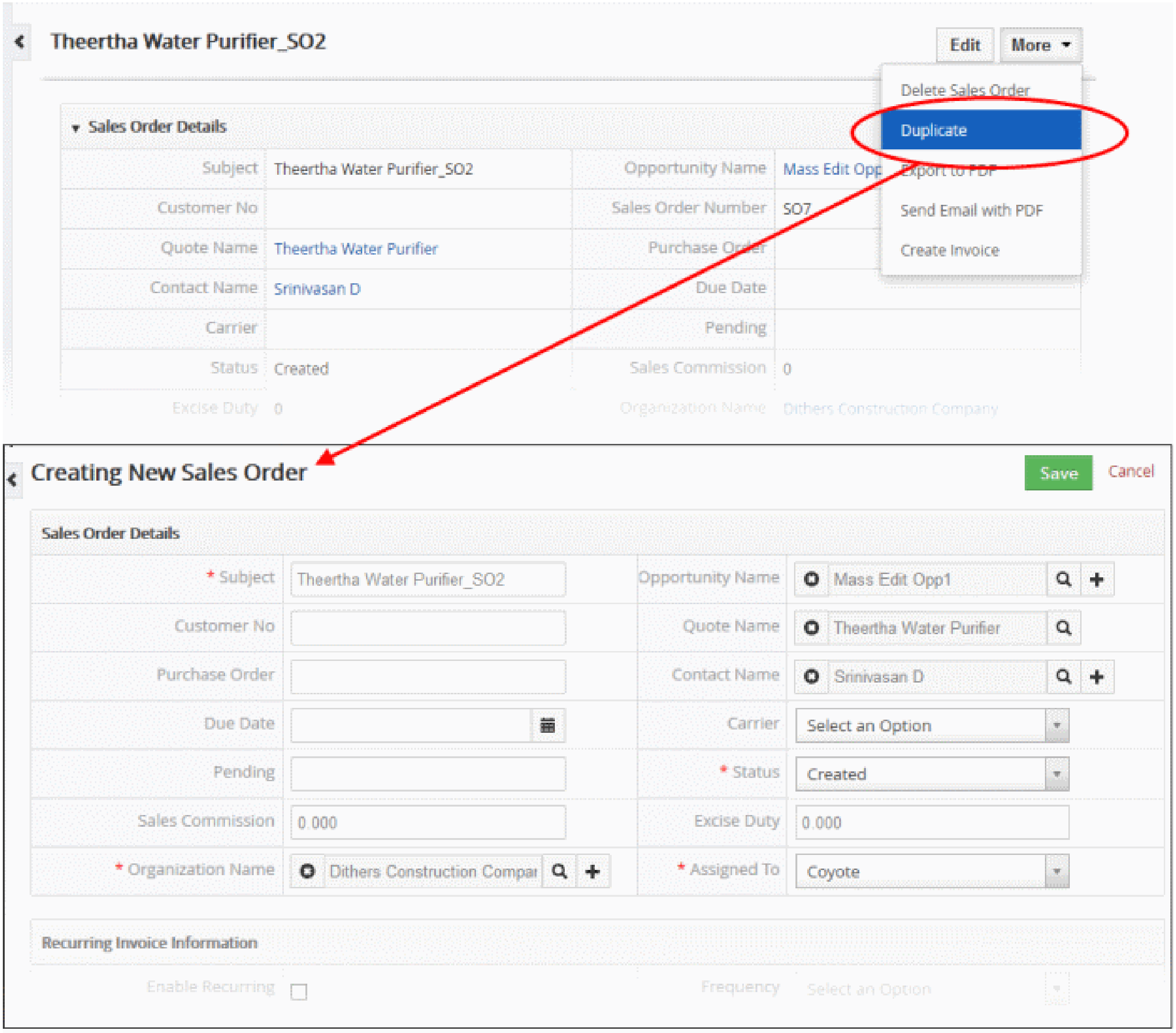
- **Terms and Conditions** - Update the terms and conditions if any
- **Items Total** - Total price of all products and services in the quote.
- **Discount** - Total discounts across all products and services.
- **Shipping & Handling Charges** - Enter the shipping and handling charges for all items.
- **Pre-Tax Total** - Total price of all products and services before taxes are applied.
- **Tax** - Click the 'Tax' link to view set tax. Note: This field will appear only for 'Group' tax mode.
- **Adjustments** - Specify if there are any adjustments such as discounts or extra charges on the taxable amount.
- Click 'Save'

Clone a Sales order

CRM allows you to create a new sales order using an existing record as a template. You can then edit the cloned record according to the requirements. This is useful, for example, when you have a sales order which has all the required products and services already configured but you just need to edit the company details.

To clone a sales order record

- Click 'All' on the title bar and choose 'Sales Order' under 'Marketing and Sales' to open the 'Sales Order List' interface
- Click on the name of the quote record you want to clone to open the the 'Sales Order Details' interface
- Click 'More' on the top right and choose 'Duplicate'



The 'Creating New Sales Order' form will open with the details populated from the original record.

- Enter a new subject for the new sales order
- Edit the details as required. Descriptions of the form parameters are available in the **table above.**
- Click 'Save'.

The sales order record will be saved and added to the list of sales order records in the 'Sales order List' interface.

Create a record from another module

You can also create new sales order from other modules. For example you can create a sales order from a particular sales record. See '**Associate Invoice Records to a Sales Order**' for more information.

3.8.2. Manage Sales Orders

- The 'Sales Order List' interface lets you view and update sales order details, including recurring invoice information, purchase order information and more.
- You can also schedule 'To Do' activities for the sales order from this interface. The activities will be reflected in the calendars of team members assigned to the sales order.
- You can create an invoice or associate an existing invoice record from an invoice details page.
- You can send emails of the sales order in pdf format.

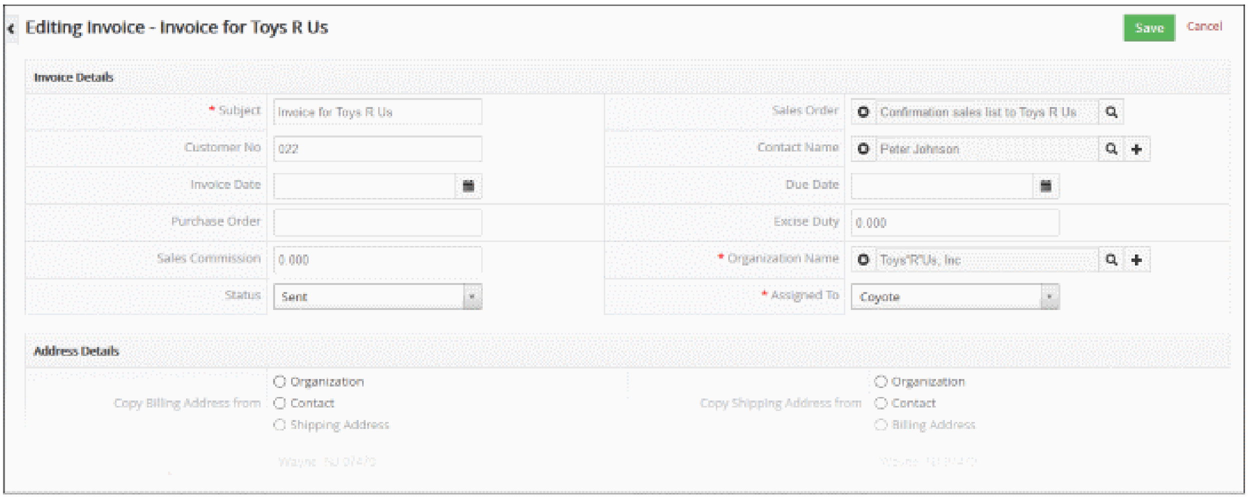
To view sales order details:

- Click 'All' > 'Sales Order' to open the 'Sales Order List' interface
- Click on a sales order to open its details page

To edit a sales order:

- Click 'All' > 'Sales Order' to open the 'Sales Order List' interface
- Click on a Sales Order's name and then the 'Edit' button at the top right of the 'Sales Order Details' interface.

  OR
- Click 'All' > 'Sales Order' to open the 'Sales Order List' interface
- Place your mouse cursor over the name of a sales order to reveal the action buttons on the right side of the row.
- Click the 'pencil' icon to open the 'Sales Order' edit interface:



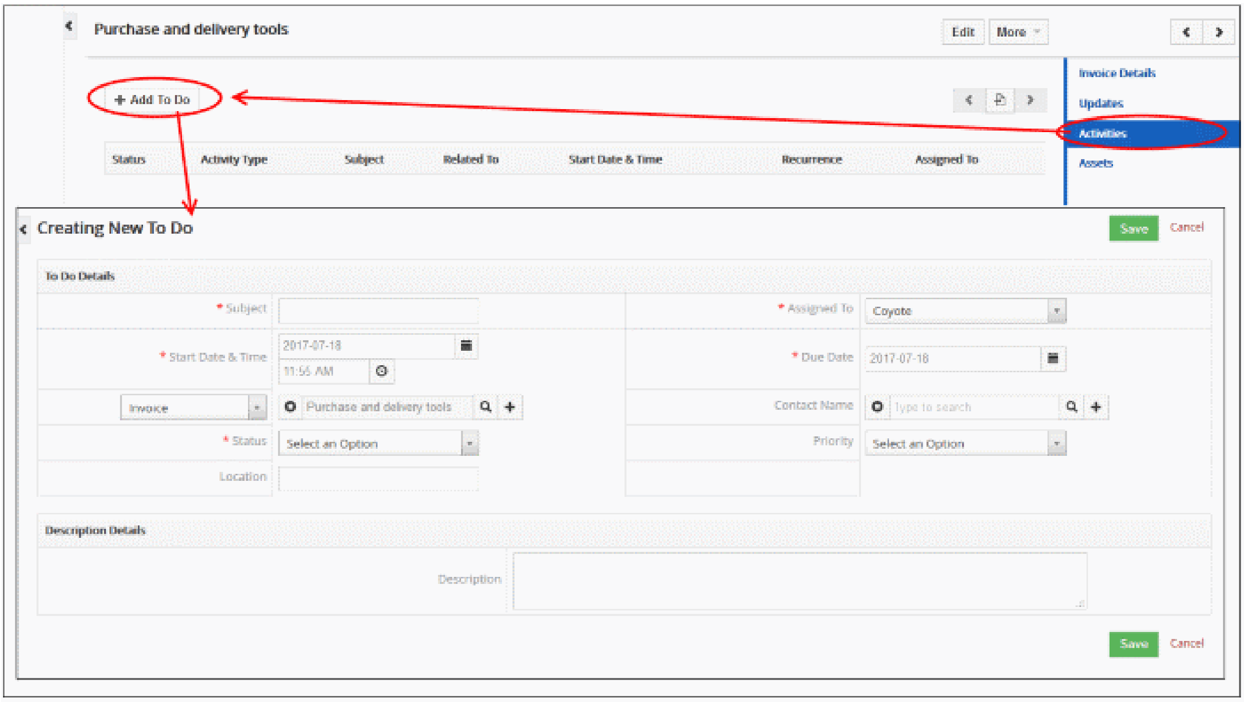
- See **this table** for descriptions of the fields in the 'Sales Order Details' interface

Activities

A 'To Do' activity is a task with a set start time and a due date. You can assign a 'to do' regarding the sales order to a staff member. For example, you may want the staff member to send it to the customer by a certain time. You can add a description in the field at the bottom. 'To do' activities will be added to the CRM calendar.

To create a 'To Do' activity :

- Click 'All' > 'Sales Order' to open the 'Sales Order List' interface
- Click on a sales order to open the sales order details interface
- Click 'Activities' from the menu on the right
- Click the '+ Add To Do' button in the activities interface.



The 'Creating New To Do' screen will be displayed:

- Enter the required details and click 'Save'.

See '**Manage Shared Calendar**' for more details on the 'Event/To Do' full form.

The interface lets you do the following:

- Sales Order Details - Displays the sales order details
- Updates - View the modifications done on the sales order record
- Activities - Allows you to view and add future tasks related to the sales order
- Invoice - View and create invoices from the sales order. See **Manage Calendar** for more details.

Please see **Associate Modules with Other Records** for more details.

To manage operations in detail view of the Sales Orders module

- Select a desired sales order record
- Click 'Edit' to modify a field information
- In 'More' select the following to,
  - 'Delete Sales Order' to delete sales order record
  - 'Duplicate' to create a new sales order record with similar properties
  - 'Export to PDF' to export the sales order record in the default PDF
  - 'Send Email with PDF to send the sales order in pdf format
  - 'Create Invoice' to create the invoice related to the sales order record

3.8.3. Associate Records from other modules to a Sales Order

You can associate a sales order with a product, organization, contact, opportunity or quote. There are two ways to do this:

1. From within another module.
   - Open any product, organization, contact, opportunity or quote record.

- Click 'Sales Order' in the right-hand menu to view and add sales orders.

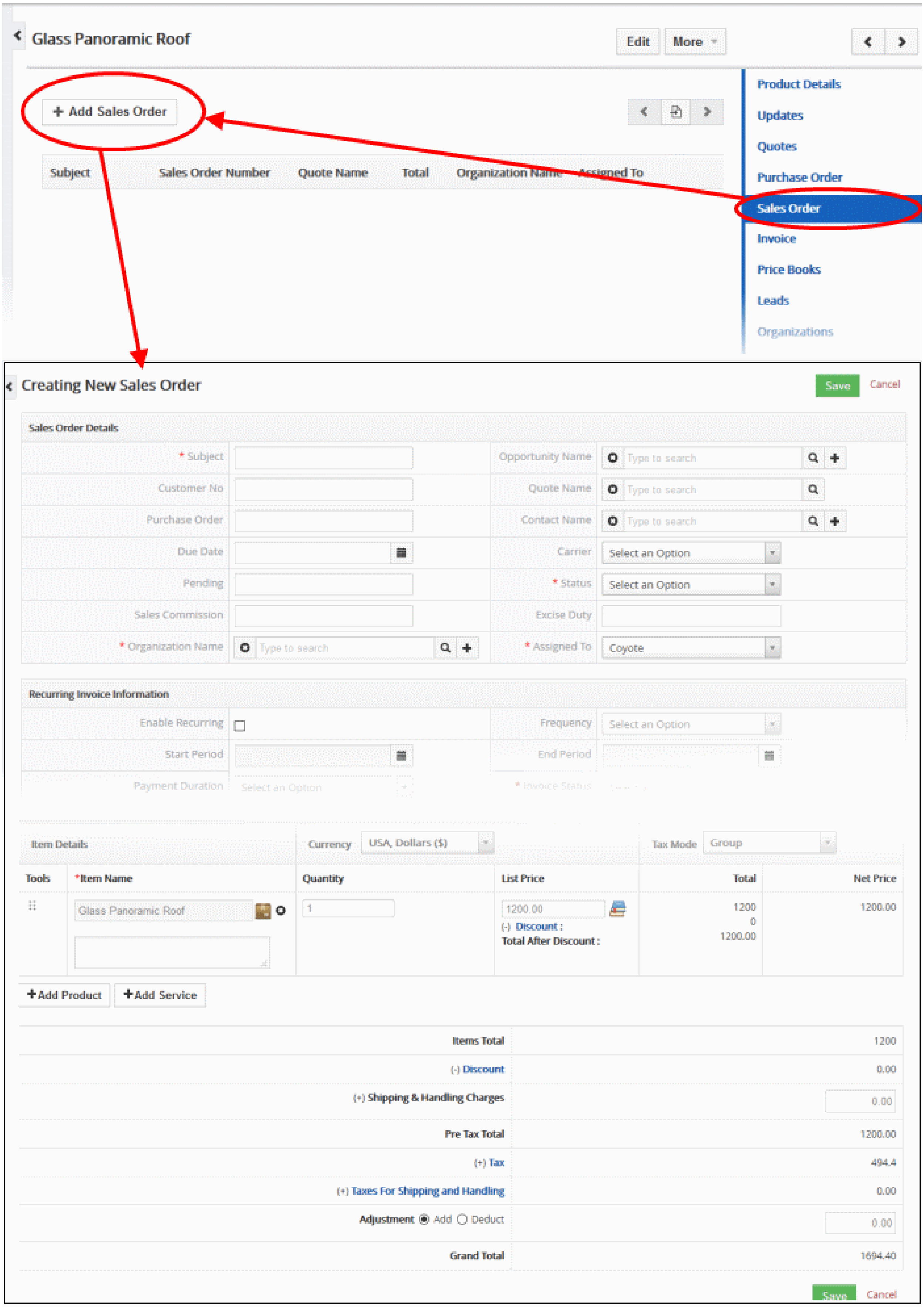
2. While creating a sales order.
    - The 'New Sales Order' configuration screen lets you map a sales order to an organization, product, opportunity, contact or quote.

Please note that a 'Product' or a 'Service' module will always be associated to a sales order by default.

1. To create a sales order from other modules

The example below describes how to view and manage the 'Sales order' records associated with a product record. A similar process can be followed to associate other module types.

- Click 'All' > 'Product' (under 'Inventory')
- Click a product record in the list then click 'Sales Order' on the right
- Click the '+ Add Sales Order' button.



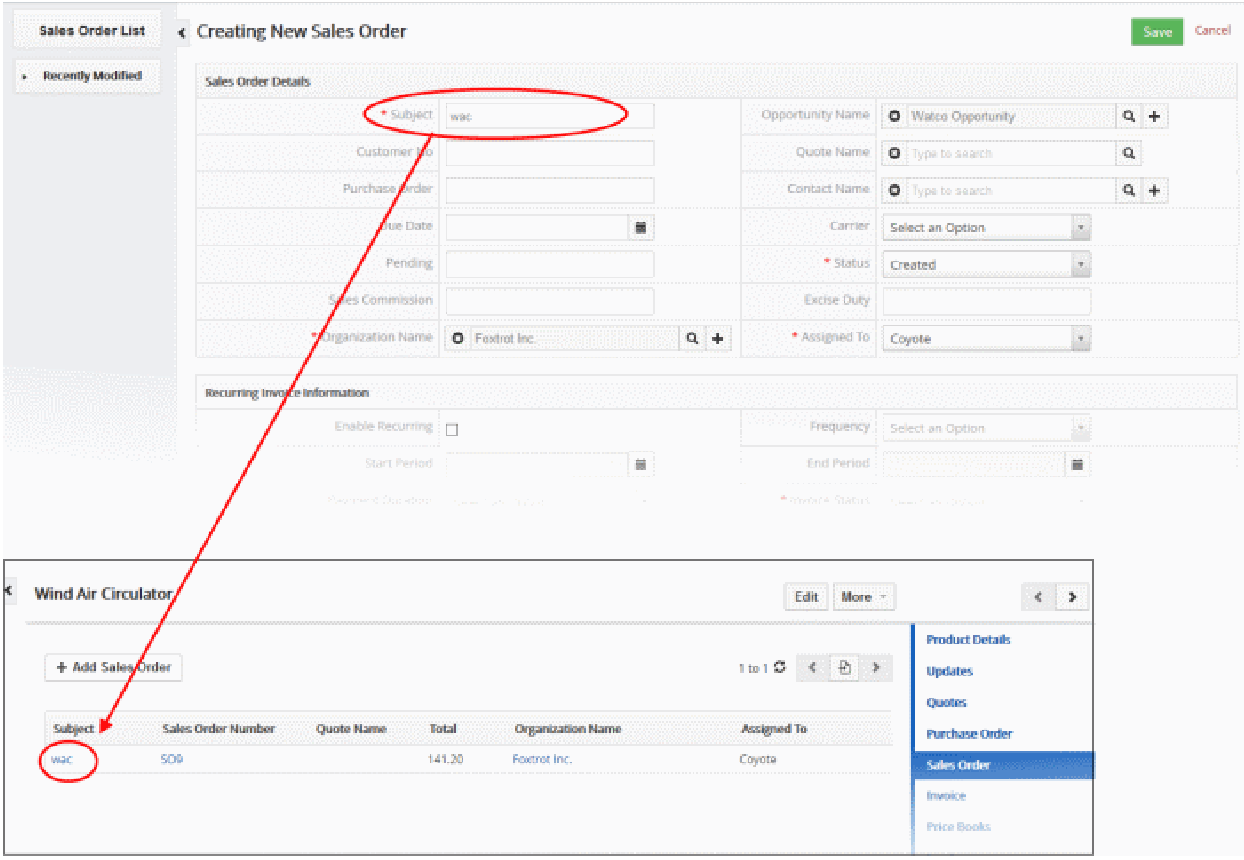
Note: If you have added sales order to this product earlier then it will be listed in this interface.

- Enter the 'Subject', 'Status', 'Organization Name', 'Billing and Shipping Address' details(Other mandatory fields like 'Item Name' will be populated) and click 'Save'

The sales order record will be added to the 'Sales Order' interface associated with the product record.

2. To create a sales order from the 'Sales Order' interface

- Click 'Add Sales Order'
- Enter 'Subject name' to track the sales order and then 'Status', 'Organization Name', 'Billing and Shipping Address' details and 'Product Name'.



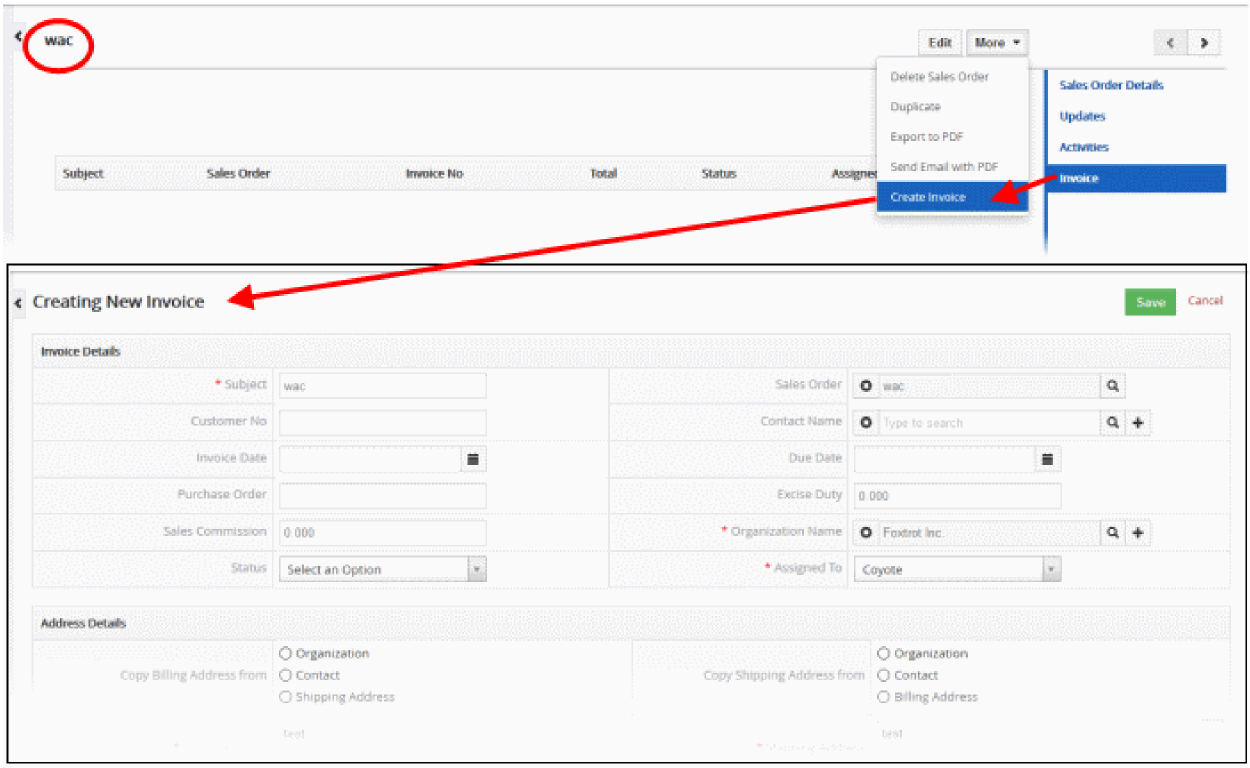
- Click 'Save'

This sales will be listed in opportunities, organizations, contacts and products or services.

Generating a invoice from a sales order

To view, add and manage associated records:

- Click 'All' > 'Sales order'
- Click any sales order to open its detail page



The menu on the right shows modules that can be associated with a sales order. Click on the 'Invoice' links to view sales order records that have already been associated with an invoice or create an invoice. See **Create an Invoice** create an invoice.

3.8.4. Mass Management of Sales Orders

You can edit / delete / import / export / de-duplicate numerous sales records at once. This is useful when you are modifying details that are common to a group of sales order records. For example, you may have a set of sales orders with old terms and conditions that need to be revised as per updated versions.

Tip: If you want to update the details of a *single* sales order record:

- Open the 'Sales Order List', click the invoice name then click the 'Edit' button.
- See '**Manage Sales Order**' for more details.

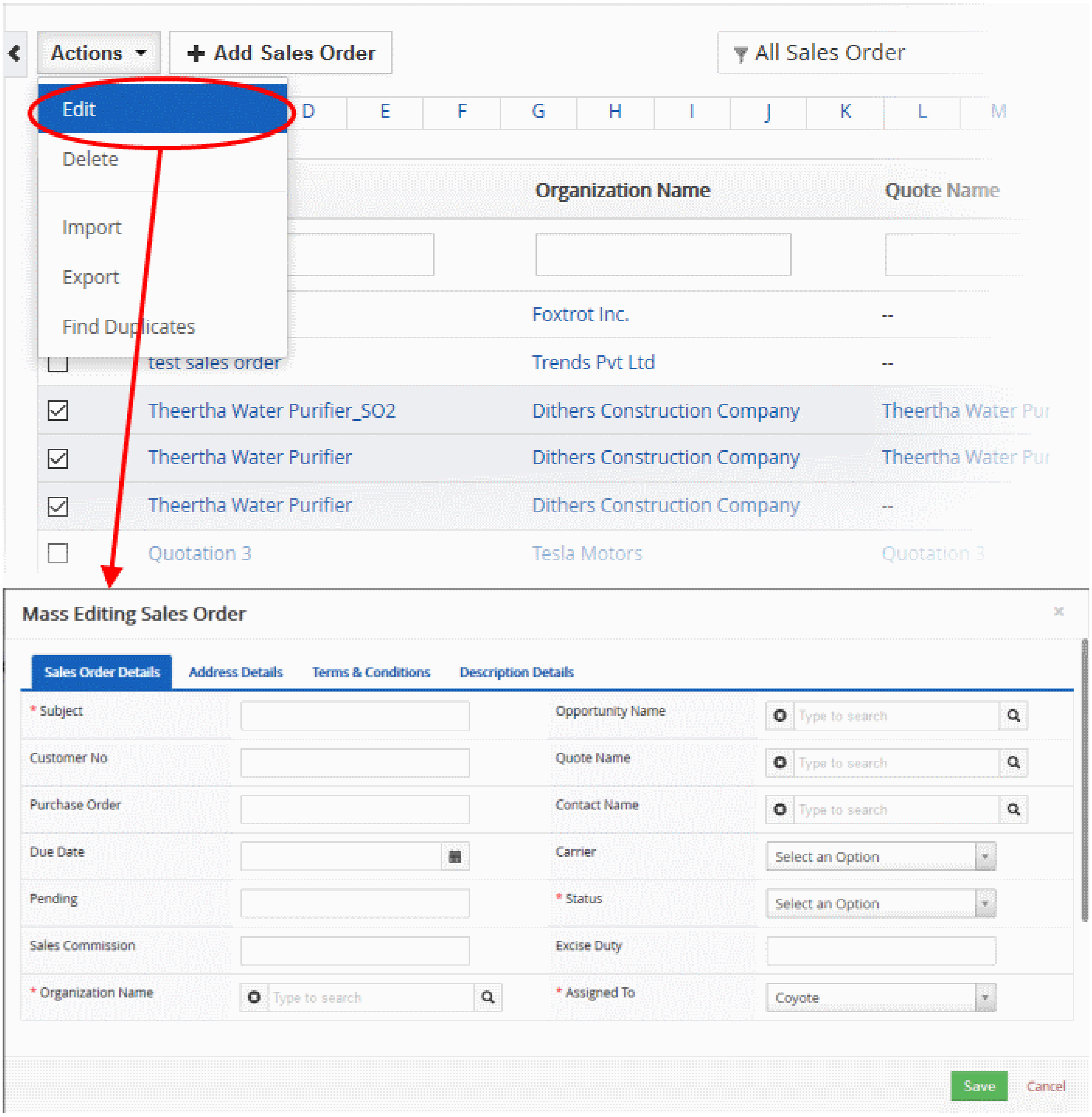
The interface allows you to:

- **Edit sales order records**
- **Delete sales order records**
- **Import / export sales order records**
- **Find duplicate sales order records**

To edit common details of several sales order records

- Click 'All' > 'Sales Order' (under 'Marketing and Sales') to open the 'Sales Order List' interface
- Select the sales order to be edited
- Click 'Actions' and choose 'Edit'

The 'Mass Editing Sales Order' pop-up will appear:



This interface contains four tabs:

- Sales Order Details - Allows you to specify subject, contract name and more. See **this table** for descriptions of the fields in the 'Sales Order Details' tab.
- Address Details - Allows you to enter the values for billing and shipping addresses in the selected sales order records. See **this table** for descriptions of the fields in the 'Address Details' tab.
- Terms & Conditions - Allows you to provide a common 'Terms & Conditions' for the selected sales order records.
- Description Details - Allows you to enter a common description for the selected sales order records.

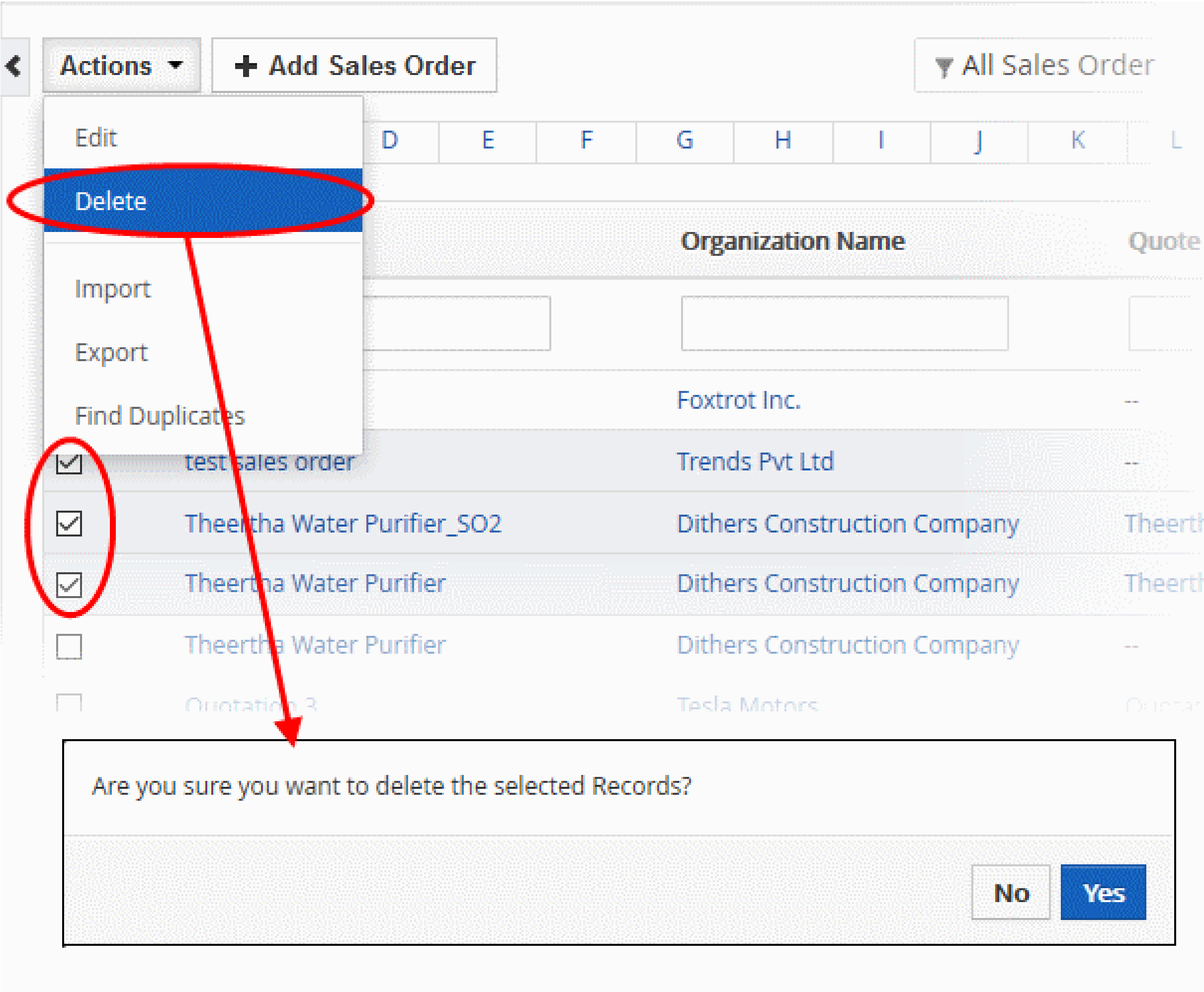
Click 'Save'.

To delete sales order records

Sales order records that are no longer required can be removed.

- Click 'All' > 'Sales Order' (under 'Marketing and Sales') to open the 'Sales Order List' interface

- Select the sales orders to be deleted
- Click 'Actions' and choose 'Delete' button.



- Click 'Yes' in the confirmation dialog to remove the record(s)

To import / export sales order records

Export:

- Click 'All' > 'Sales Order'
- (Optional) Select the sale order you wish to export
- Click 'Actions' > 'Export'
- Choose whether to export selected records, all visible records or all records
- Click 'Export Sales Order'.
- Sales orders are exported in .csv format

Import:

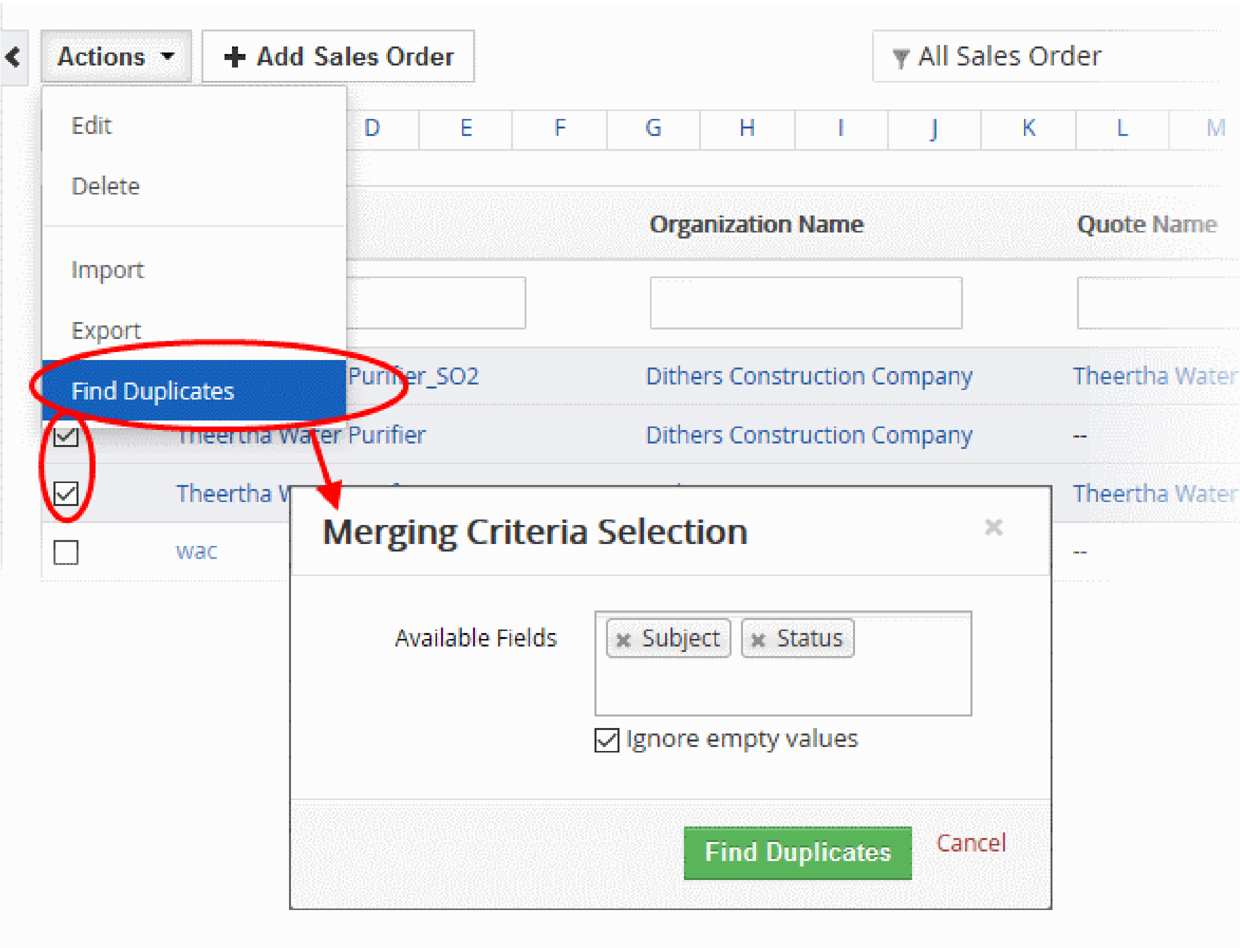
- Click 'All' > 'Sales Order'
- Click 'Actions' > 'Import'
- Browse to the file containing your sales order records
- Specify the format of your file
- Click 'Next' to begin the import.

See '**Import and Export Records**' for more information.

To find duplicates

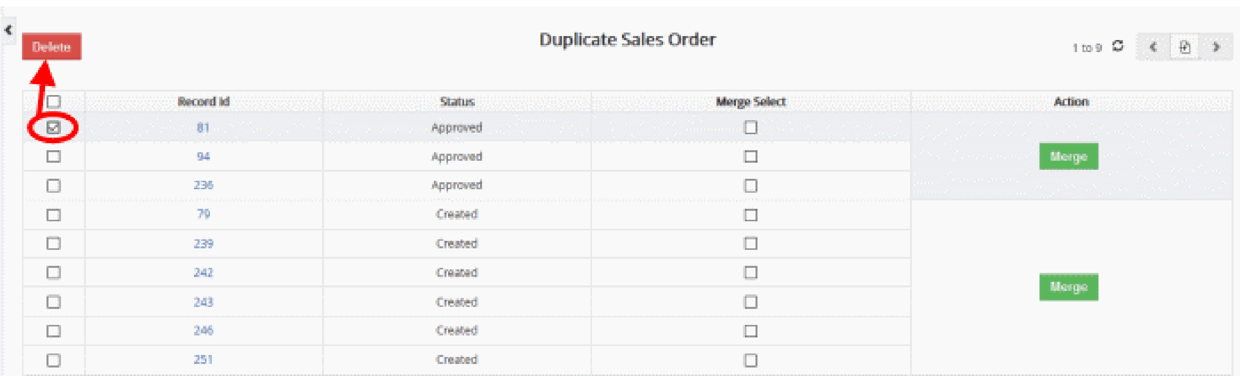
You can find duplicates from multiple sales order records at once.

- Click 'All' > 'Sales Order' (under 'Marketing and Sales') to open the 'Sales Order' interface
- Click 'Actions' and choose 'Find Duplicates'

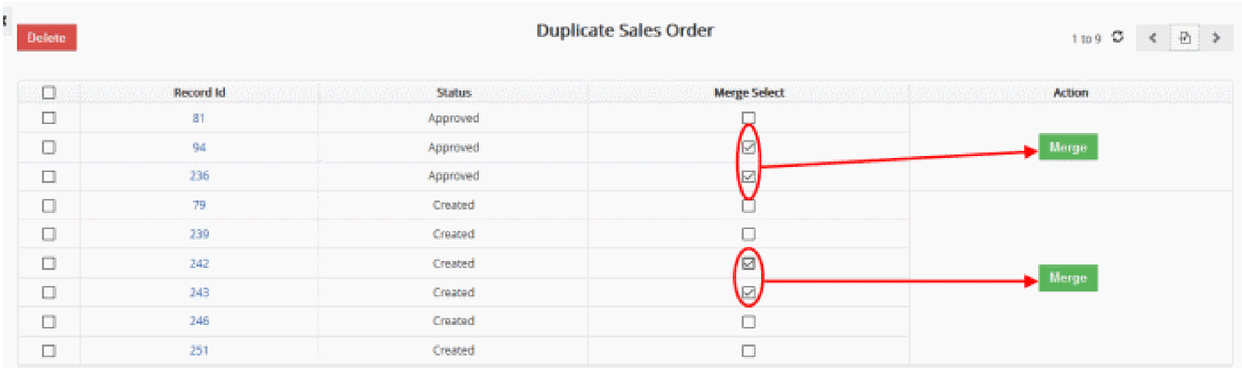


- Click in the 'Available Fields' box and choose the invoice related fields from the drop down. 'Ignore empty values' means the CRM will not consider matching blank fields as indicating a duplicate.
- Click 'Find Duplicates'

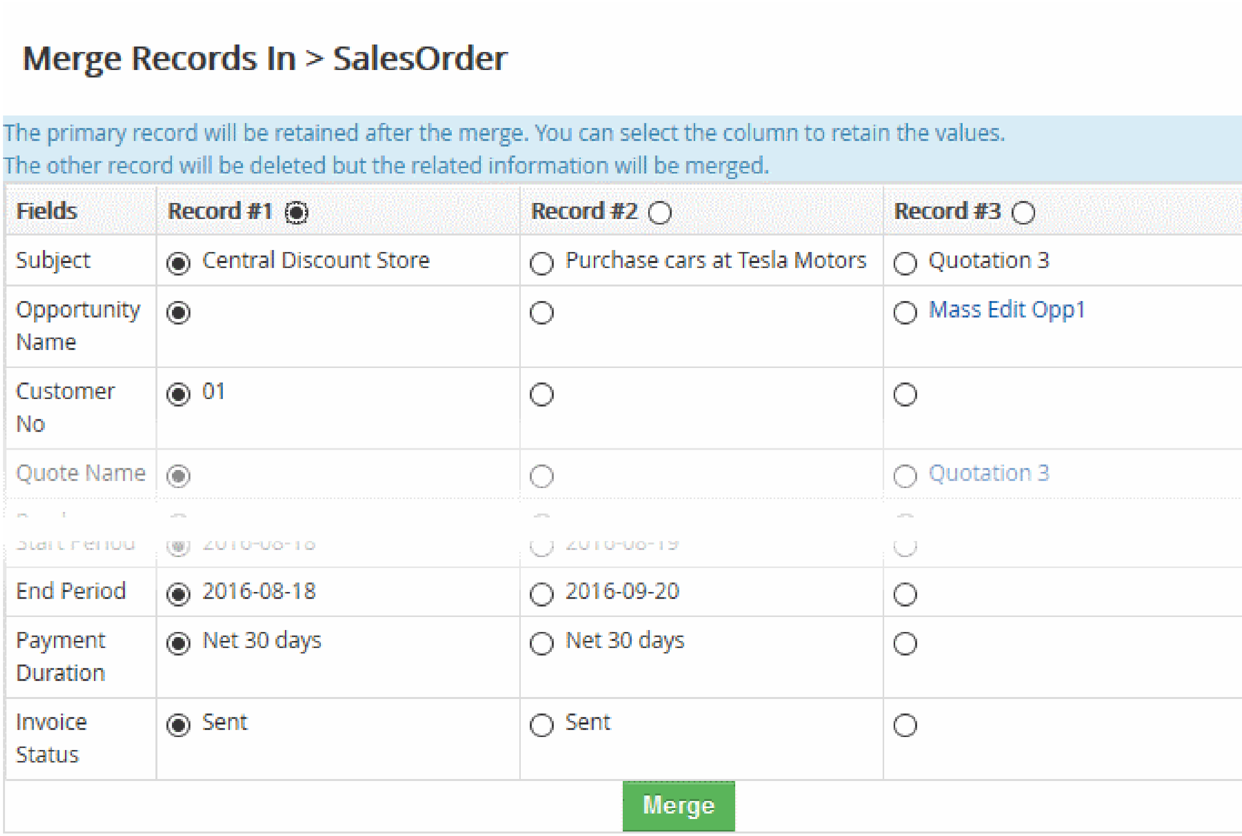
The 'Duplicate Sales Order' page will be displayed.



- To delete a duplicate sales order record, select it and click the delete button on the top left.
- To merge duplicate records, select them from the 'Merge Select' column and click 'Merge'



The 'Merge Records In > SalesOrder' dialog will be displayed:



- The selected 'Record #' is the primary record. Select other record to change the primary record.
- Select the column values that should be retained in the merged primary record. Please note you can select only one column value for the merged record.
- Click 'Merge'. The records will be merged and displayed in the 'Sales Order List' page as per the selected column values.

3.9. Import and Export Records

CRM allows you to import and export records to and from various modules. The example below describes how to import and export opportunity records.

Importing opportunity records:

You can import records in .csv or .vcf format.

Prerequisites

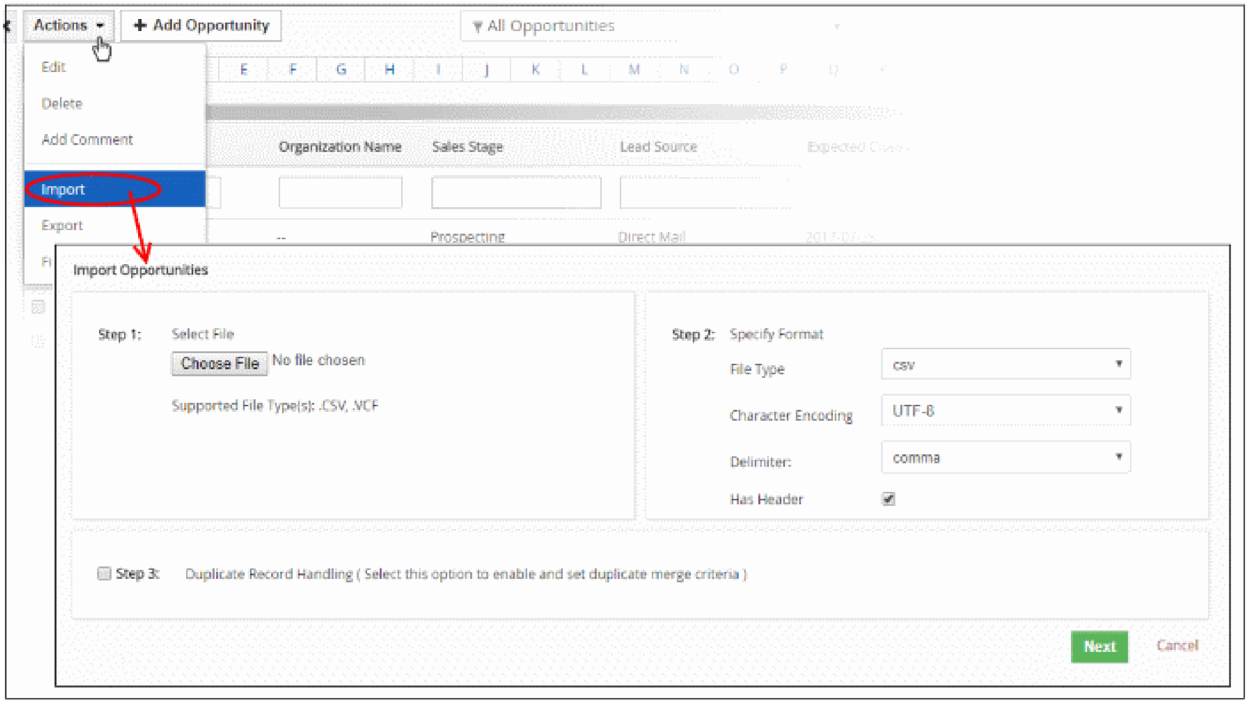
- Make sure your imported file contains all mandatory information. For example, 'Opportunity Name' and

'Assigned To' are mandatory for importing opportunities records.

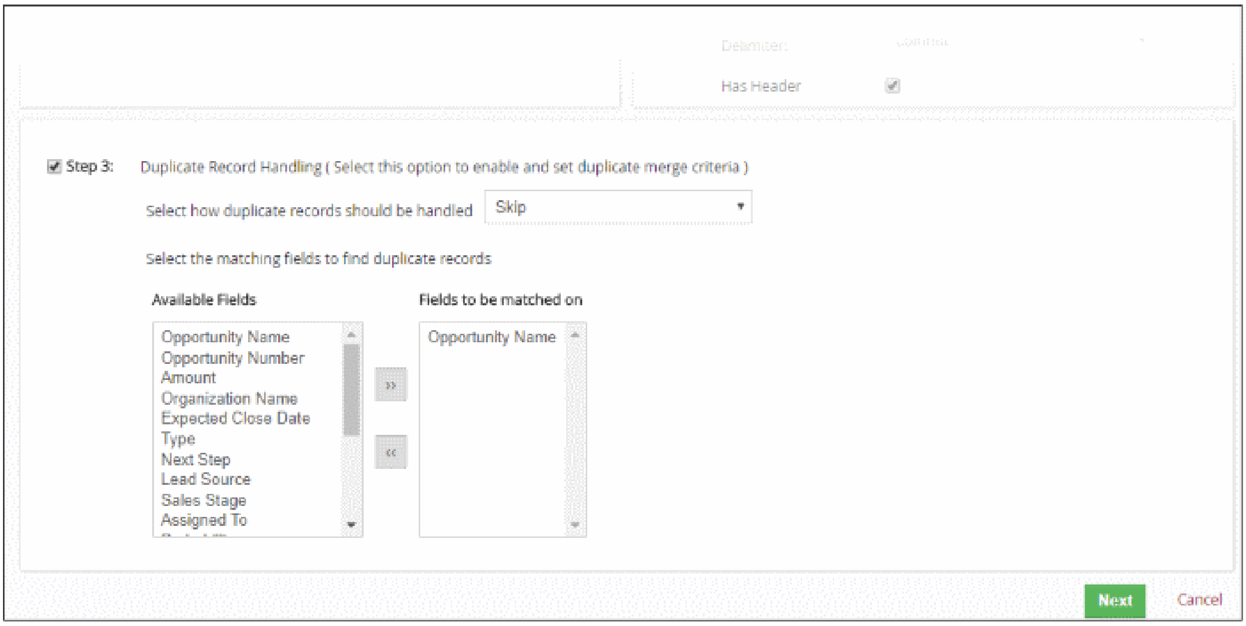
- The maximum size of imported files is 3MB.
- Make sure you have permissions to import. Administrators may have disabled import functionality at the profile level.

To import opportunities records:

- Click 'All' > 'Opportunities' to open the 'Opportunities List' interface
- Click the 'Actions' drop-down (above the table of opportunities)
- Click 'Import'. The 'Import Opportunities' page will open:

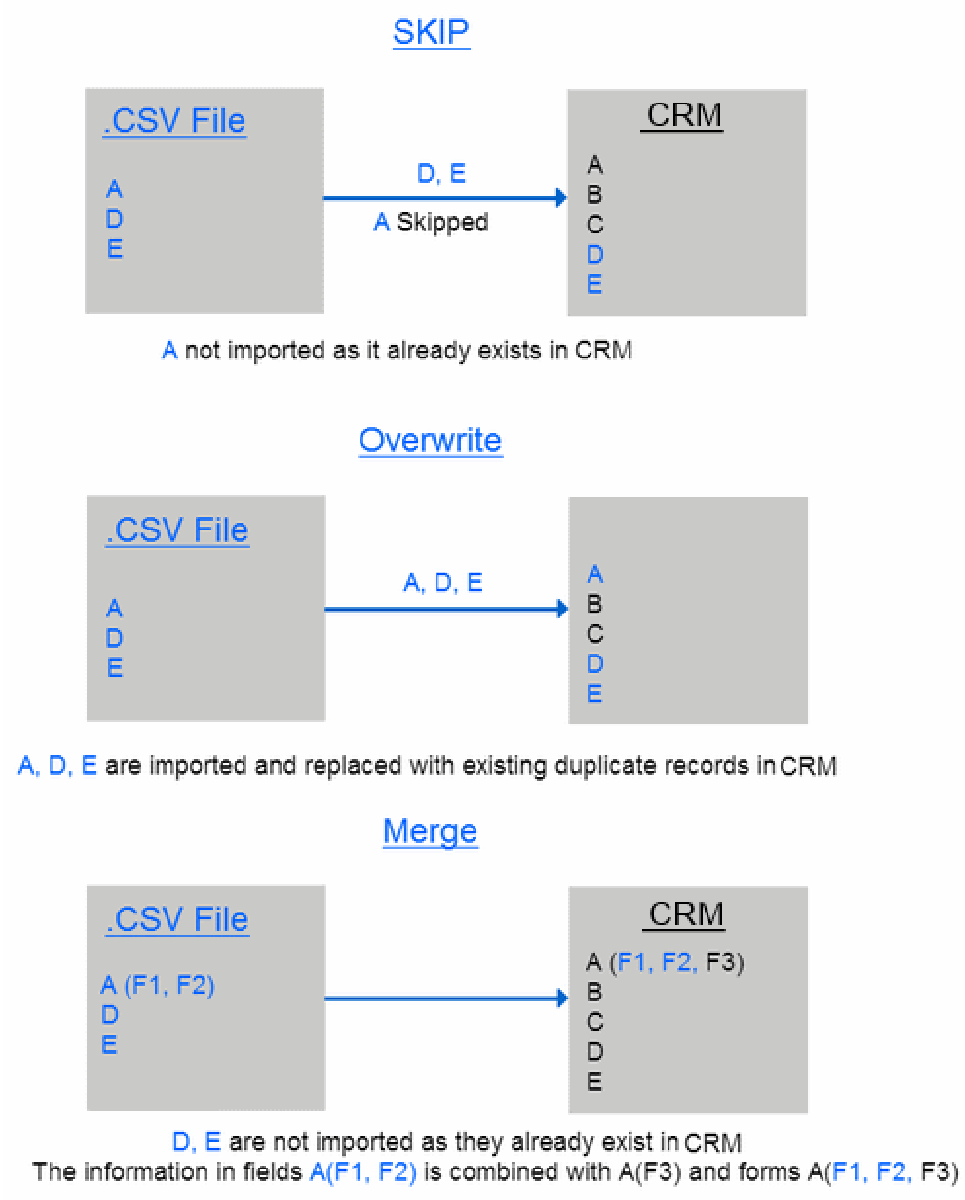


- Select and upload your .csv or .vcf file in step 1.
- Specify the format of your import file in step 2:
  - **File Type -** CRM can import .csv or .vcf files
  - **Character Encoding -** Select the character set in which your import file has been encoded.
  - **Delimiter -** Choose whether the fields in your imported file are separated by commas or by semi-colons. CRM will not recognize fields that are not separated by a delimiter.
  - **Header -** A header row contains the data labels for the columns in your spreadsheet or text file. For example, 'First Name', 'Last Name', 'Organization Name'. It is usually the first row in the file.
    - Select 'Has Header' if your file has headers. You will be asked to map the headers in your file to existing CRM headers in step 4.
    - Deselect this option if your file doesn't have a header row.
- **Duplicate Record Handling -** If enabled, you can specify how duplicate records are handled. The system will compare fields in existing CRM records with those in the file you wish to import. If duplicates are found you can instruct the CRM to skip, overwrite or merge the opportunity record.



First select the fields you want the CRM to use for duplicate checking. An opportunity that has data in these fields which matches data in the corresponding field of an existing opportunity will be classed as a duplicate. Next, choose a response if a duplicate is found:

- **Skip -** The CRM will not import the duplicate opportunity
- **Overwrite -** The existing opportunity in CRM will be replaced by the imported opportunity



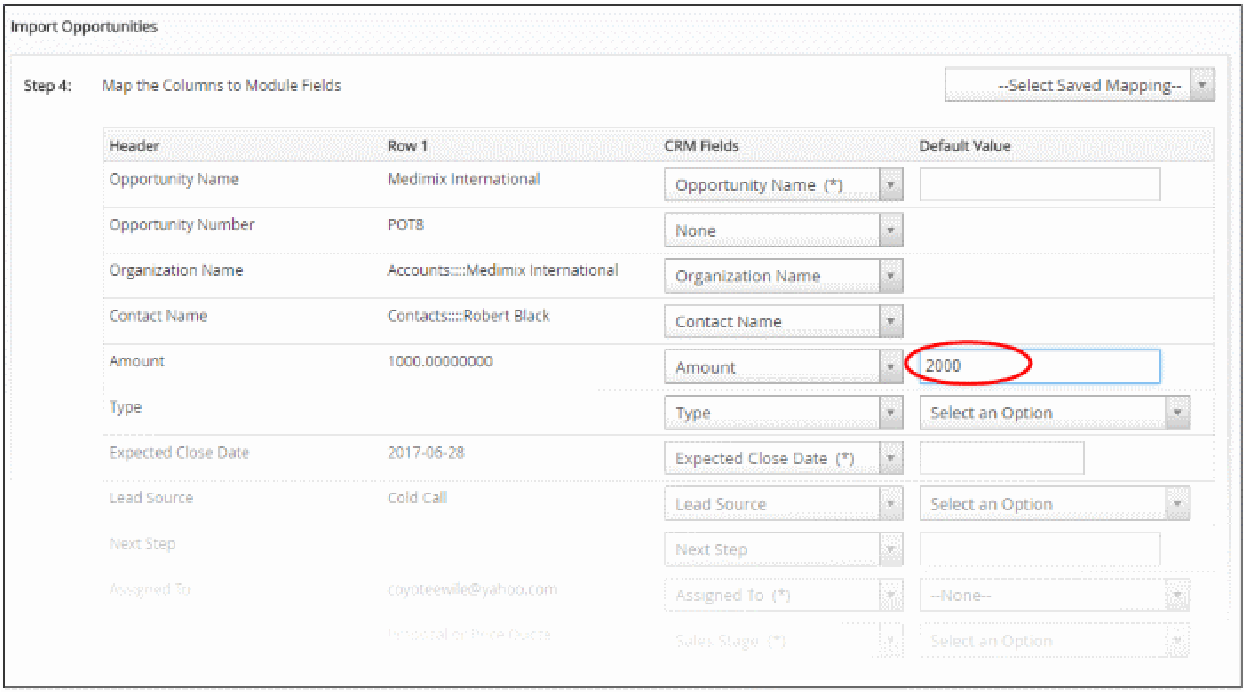
- Merge - Checks the opportunity as a whole and uses information from both records to create a single record in the CRM

i. If all fields are the same then the opportunity will not be imported as there is no new data

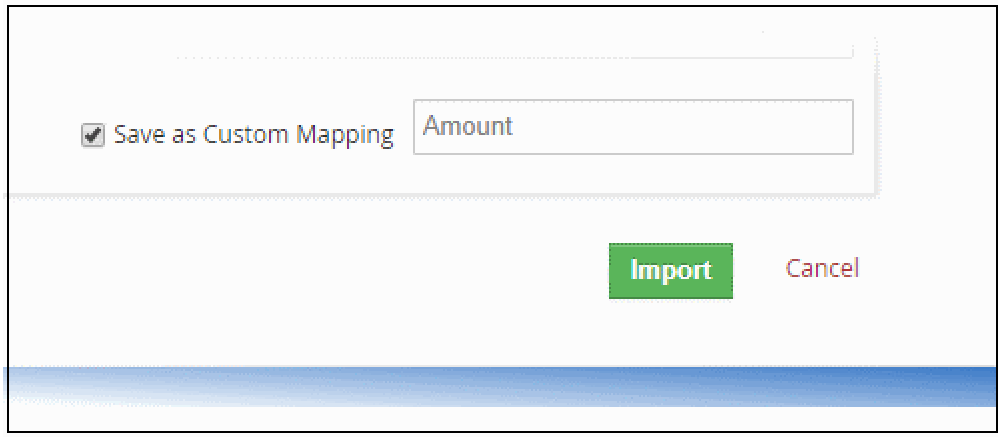
ii. If data in a particular field is different in both opportunities, then the data from the .csv will be imported, overwriting the data in the existing opportunity

iii. If a .csv field contains data, but the corresponding field in the existing opportunity is blank, then the data from the .csv will be imported

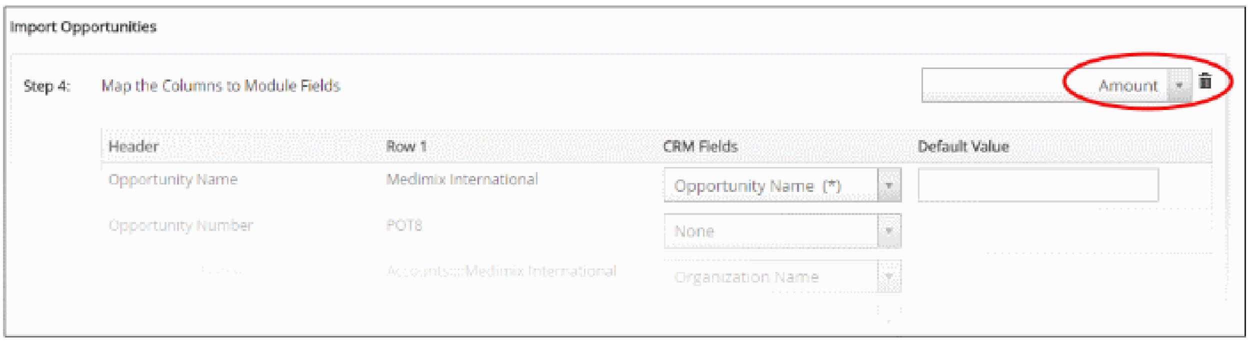
- Click 'Next'
- **Map CRM Fields -** Map the headers in your .csv to headers in CRM. This is only necessary if you selected 'Has Headers' earlier.
  - Fields are automatically mapped if your .csv's headers match an existing CRM field label. Here's a list of helpful tips before you get started.



- When there is null value in any of the 'Header' fields in step 4, the default value that you enter is populated automatically in the record in CRM
- You need not have to follow any syntax to relate the records of your 'Contacts' module to the existing records of 'Opportunities' module. While importing contacts, if the opportunity name matches the existing record in 'Opportunities' module, contact is automatically related to it. CRM does spell check across existing opportunity records to avoid redundant data. Also, it is not case sensitive.
- To save and re-use this map, select 'Save as Custom Mapping' and create a short name for it.



- To delete a saved map, select it from the drop down on the top right of the 'Import Opportunity' page and click the trash icon.



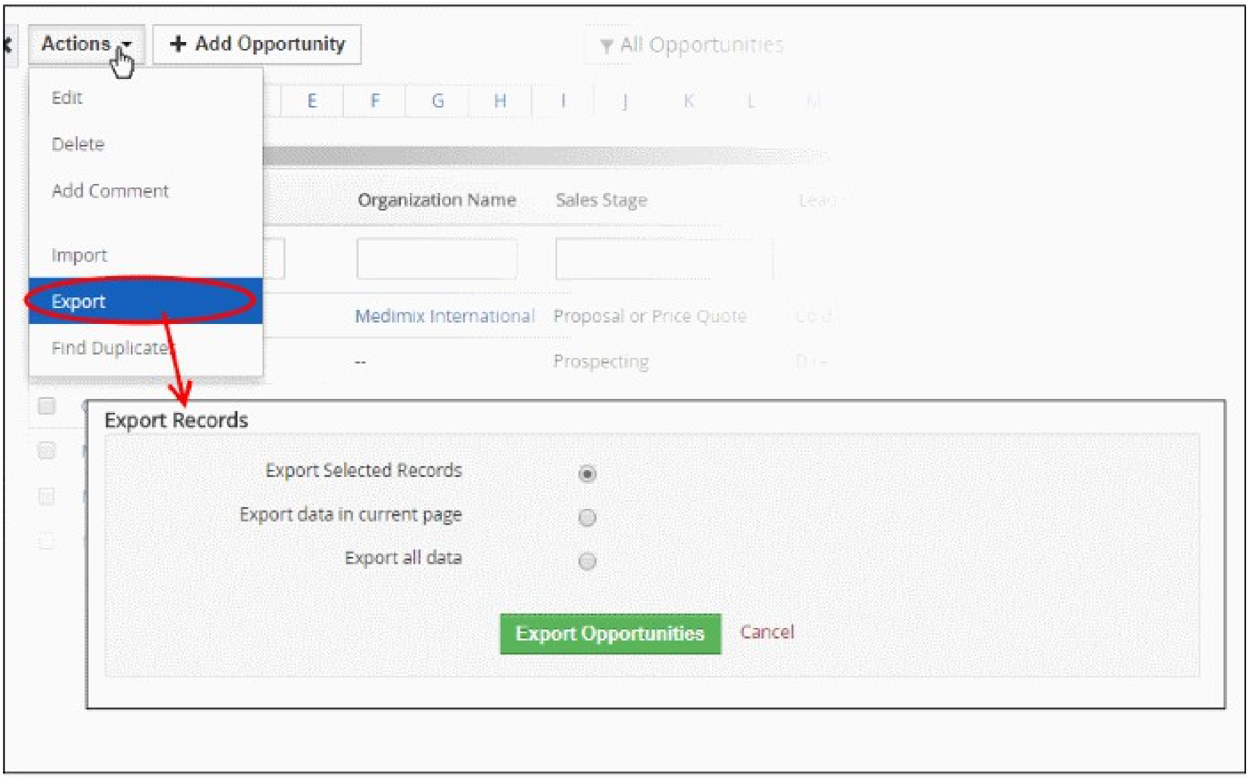
- Click 'Import'

The results of the import procedure are displayed as follows:

- 'Import More' - start another import process
- 'Last Imported Records' - view recently imported opportunities
- Click 'Finish' to close the results window

To export an opportunity record:

- Click 'All' > 'Opportunities' to open the ' Opportunities List' interface
- Click the 'Actions' drop-down (above the opportunities table)
- Click 'Export'. The 'Export Records' page will open:



- If you have not selected any records in the 'Opportunity List' page then a 'No record selected' message will be shown.
- Use the radio buttons to choose which data to export. You can export records you selected in the previous step, export all visible records on the current page (default=20), or export all opportunities in the module.

- Click 'Export Opportunities'. Records will be exported in .csv format.

3.10. Emails

CRM allows you to send emails from different modules. The example below describes how to send mails to contacts via the 'Contacts' interface.

Note: You can send emails to multiple Leads, Organizations and Contacts. However, you only send mails to single contacts for Quotes, Invoices, Sales Orders, Purchase Orders and Vendors.

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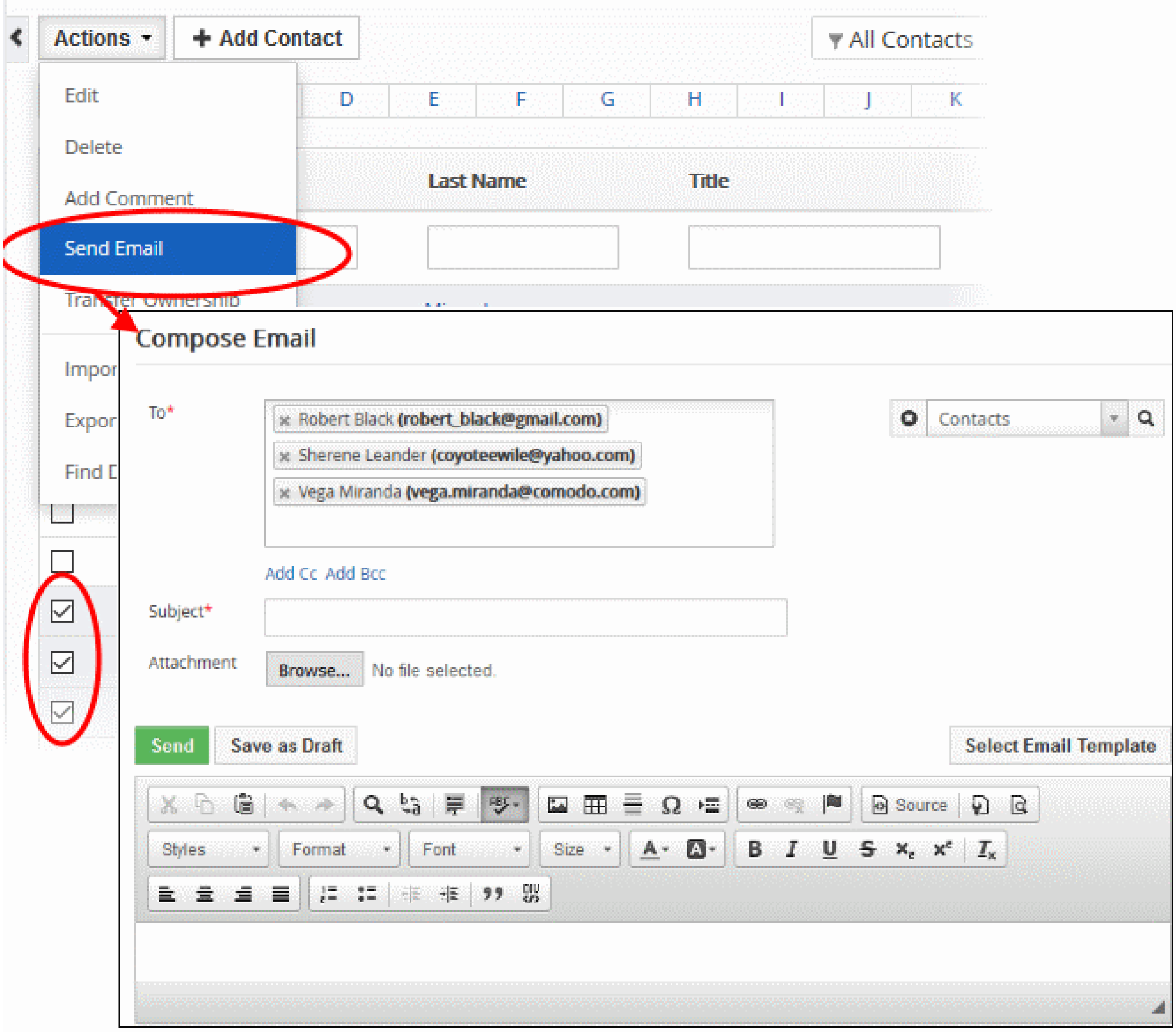
Prerequisites:

- Your outgoing mail server settings have been configured in the CRM. See **Outgoing Email Server Settings** if you need help with this.
- Contacts you plan to mail must have an email address listed for them in their contact details.
- Optional. An email template for the contact has been created and added to CRM. See **Email Templates** for more details.
- Mail Individual contacts:
- Click 'Contacts' then click the name of the person you wish to email. Make sure the person has an email address listed for them in the 'Primary Email' column. If they don't, click the contacts name then click 'Edit' to add a primary mail address.
- Click 'Send Email' to open the email editor
- The 'To' field will be auto-populated if the contact has an email address listed. If not, you will need to manually enter the contact's email address.
- Use the drop-down on the right of the dialog to add contacts from other modules.
- Optional - click 'Select Email Template' to use a canned email. If you don't want to use a template then compose your mail in the text editor.
- Click 'Send' to send your mail immediately. Click 'Save as Draft' to save the mail for later editing.

Mail Multiple Contacts:

- Click 'Contacts' then select the contacts that you wish to email. Make sure all contacts have an email address listed for them in the 'Primary Email' column.
- Click 'Actions' > 'Send Email'.
- Complete the email as described in the previous section.
- Click 'Send' to send immediately. Click 'Save as Draft' to save for later editing.

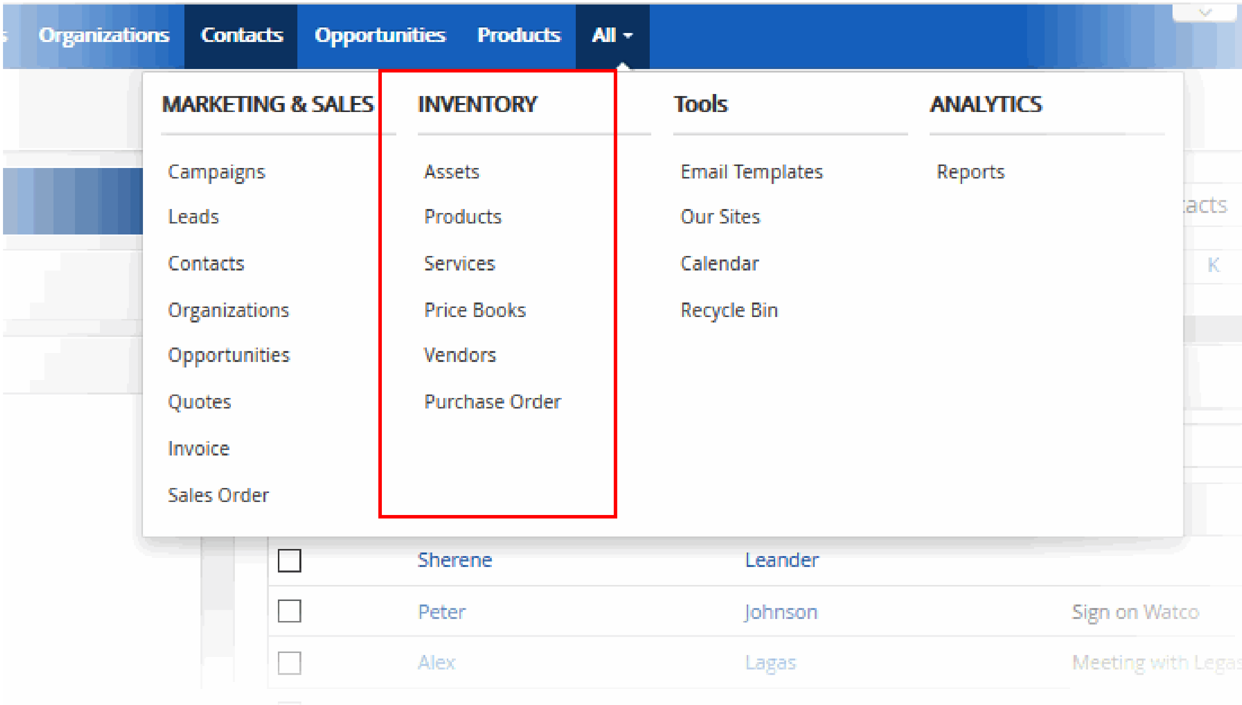


You can view emails that have been sent to a contact as follows:

- Click 'Contacts' then click the name of an individual contact. This will open the contact details page.
- Click 'Emails' in the menu on the right
-

4. Inventory

With the CRM inventory management features you can achieve seamless integration between pre-sales and post-sales accounting activities in a single application. Other advantages include:



- Procure goods or services from the selected list of vendors
- Categorize vendors by product range
- Categorize service providers according to services rendered
- Easy tracking of products sold by creating assets that helps to provide efficient after sales service
- Helps to organize products in stock, forecast demand, replenish items and estimate revenues
- Control stock in inventory to deliver products to customers on demand

The 'Inventory' category contains the following modules:

- **Assets**
- **Products**
- **Services**
- **Price Books**
- **Vendors**
- **Purchase Order**

4.1. Assets

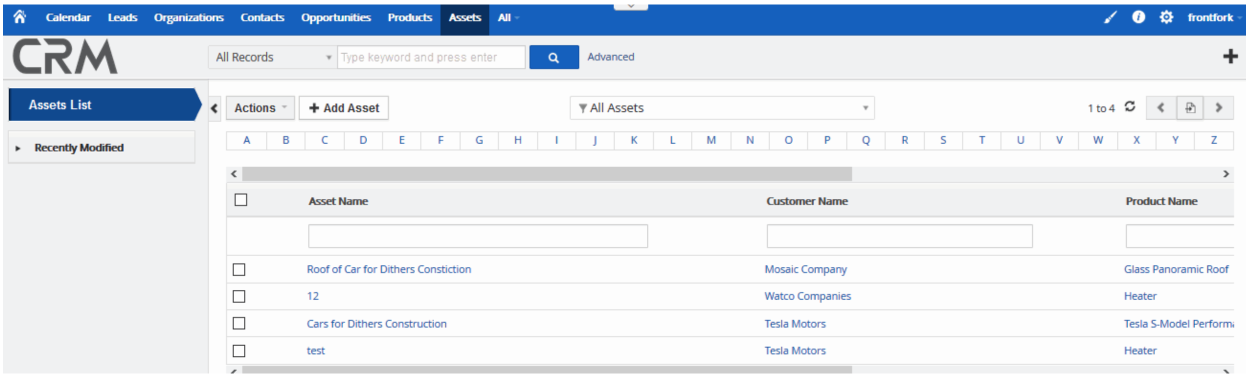
'Assets' are details of products sold to customers such as name of the product, date of sale, the name of the staff whom completed the sale, name of the invoice and so on. Assets helps the support staff to keep track of sales and resolve any problem that may arise in the future.

To open the 'Assets' interface:

- Click the 'Assets' button on the top navigation

  OR

- Click 'All' > 'Assets'



Left-hand menu:

- 'Assets List' shows all assets added to the CRM. Click any asset to open its details page.
- The 'Recently Modified' tab lists assets which were recently updated.

Assets - Column Descriptions	
Column Header	**Description**
Asset Name	The name of the asset
Customer Name	The customer that is linked to the asset
Product Name	The product that is linked to the asset

- Click any column header to sort the table according to the items in the column.
- To search for a specific item, enter the search criteria in the respective column header(s) and click 'Search' at the right end of the column header.
- For more details on advanced filter options, see '**Custom Views**'.

Custom Filter View

- The 'Assets' interface allows you to create custom views. For example, you may want to view only those assets assigned to you, and only view selected columns such as status, date in service and so on.
- You can create any number of views, and can make any view your default. See '**Custom Views**' for more details.

The following sections explain more about:

- **Create an Asset Record**
- **Manage Assets**
- **Mass Management of Assets**

4.1.1. Create an Asset Record

The customer asset interface allows you to create and keep track of items related to a product sale.

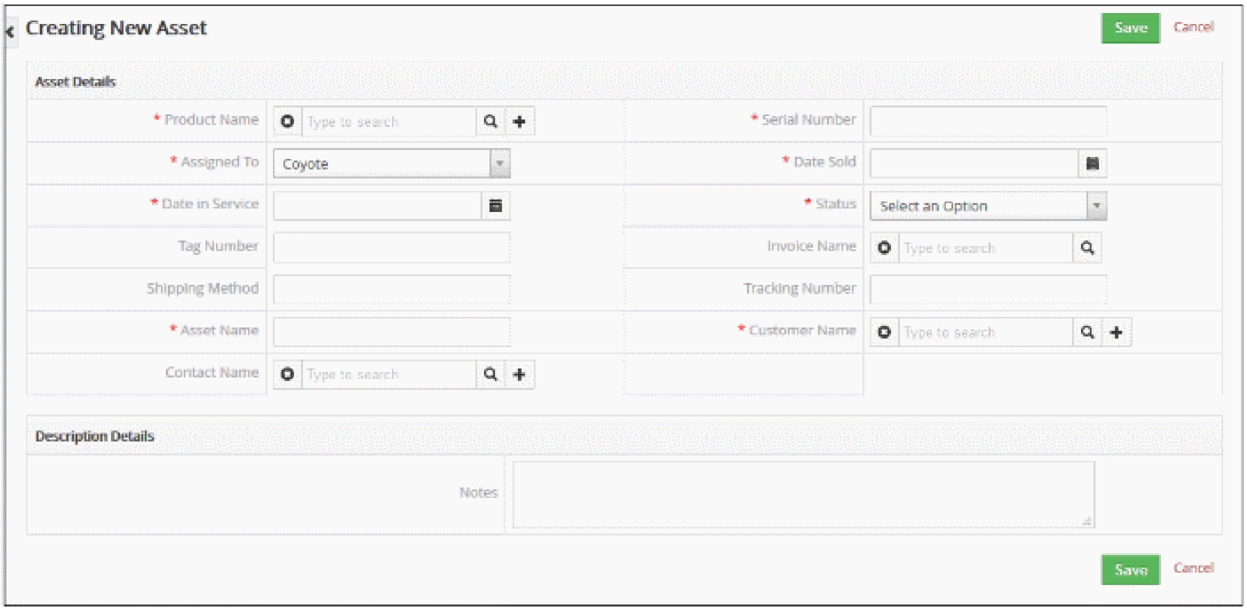
There are five possible ways to create an asset:

- Create a new asset - Click 'All' > 'Asset' > 'Add Asset'. See '**Create a New Asset**' for more information.
- Quick create a new asset - Create a new asset record with the minimum required information. Other details can be added later as required. See '**Quick Create an Asset Record**' for details.

- Clone an asset - Duplicate an existing asset to use as the starting point of a new asset. See '**Clone an Asset**' for more information.
- Import assets - Import a list of asset records from a .csv or .vcf file. See '**Import Assets**' for details.
- Create an asset from within another module (products, organizations, contacts etc). See '**Create an Asset from other Modules**' for more information.

Create a New Asset

- Click 'All' then 'Asset' (under 'Inventory'), or click 'Asset' on the title bar
- Click the 'Add Asset' button
- The 'Create New Asset' page will open:



Create New Asset - Form Parameters	
Form Parameter	**Description**
Asset Details	
Product Name	Specify the product name of the asset. You can click the '+' icon to quick create a product or click the search icon to browse existing products. This field is mandatory.
Serial Number	Enter the serial number for the asset. This field is mandatory.
Assigned To	Select the name of the staff member to whom the asset is assigned. This field is mandatory.
Date Sold	The date on which the product was sold. This field is mandatory.
Date in Service	Specify date up to which the product can be used.
Status	Select whether the product is in service or not.
Tag Number	Enter a tag number for the product
Invoice Name	Specify the invoice name to associate with the asset or click the search icon to browse existing invoices.
Shipping Method	Specify the delivery method of the product

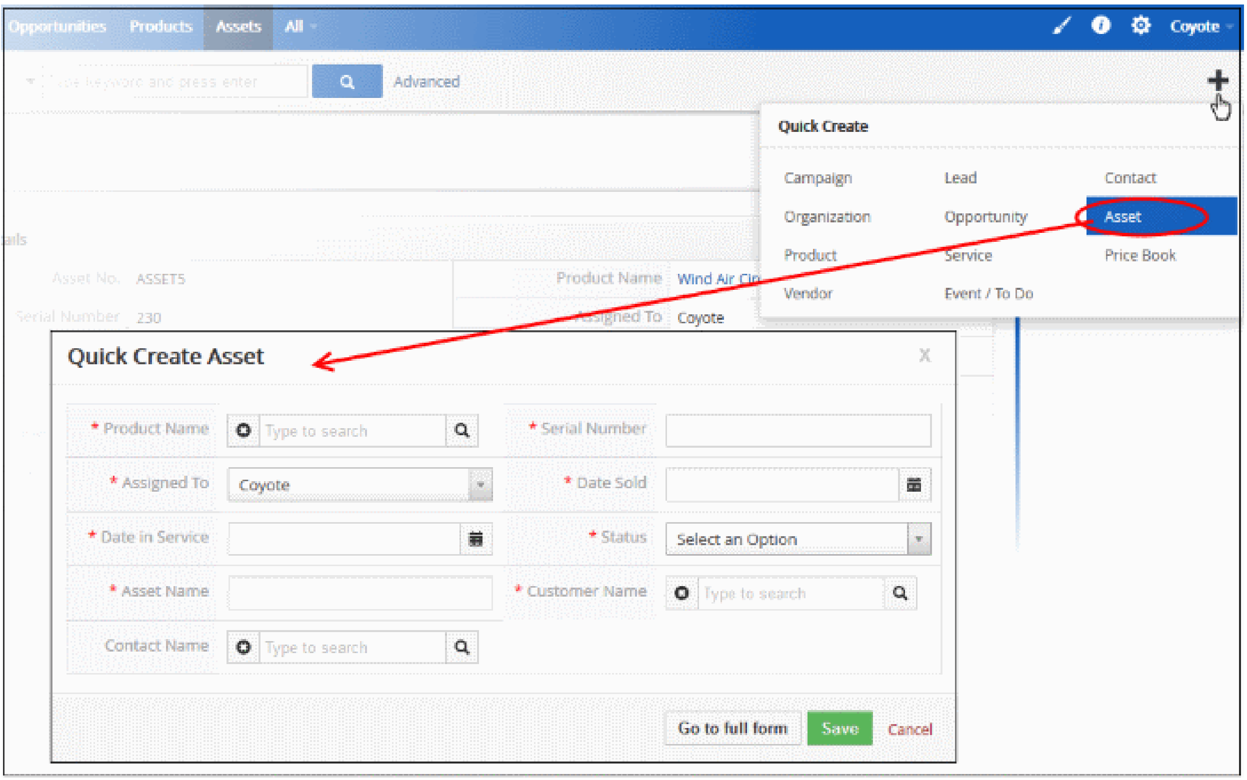
Tracking Number	A tracking number allows you to track and trace shipments as they move to their destination.
Asset Name	Enter the name for the asset. This field is mandatory.
Customer Name	Specify the organization name to associate with the asset. You can click the '+' icon to quick create an organization or click the search icon to browse existing organizations. This field is mandatory.
Contact Name	Specify the contact name to associate with the asset. You can click the '+' icon to quick create a contact or click the search icon to browse existing contacts.
Description Details	
Description	Enter any information and directions you would like to add about the asset.

- Click 'Save'. The asset will be saved and added to the list in the 'Asset List'

Quick Create a New Asset Record

The 'Quick Create' option allows you to create an asset record from any interface. It requires you to enter only basic details. You can add more details by clicking 'Go to full form'. You can, of course, also edit the record at a later date to add more information.

- Click the '+' button at the top right from any interface of CRM and choose 'Asset' from the options.



- Fill-in the opportunity details in the 'Quick Create Asset' dialog. Descriptions of the form parameters are available in **this table**.
- If you want to view and enter all details, click 'Go to full form'.
- Click 'Save'

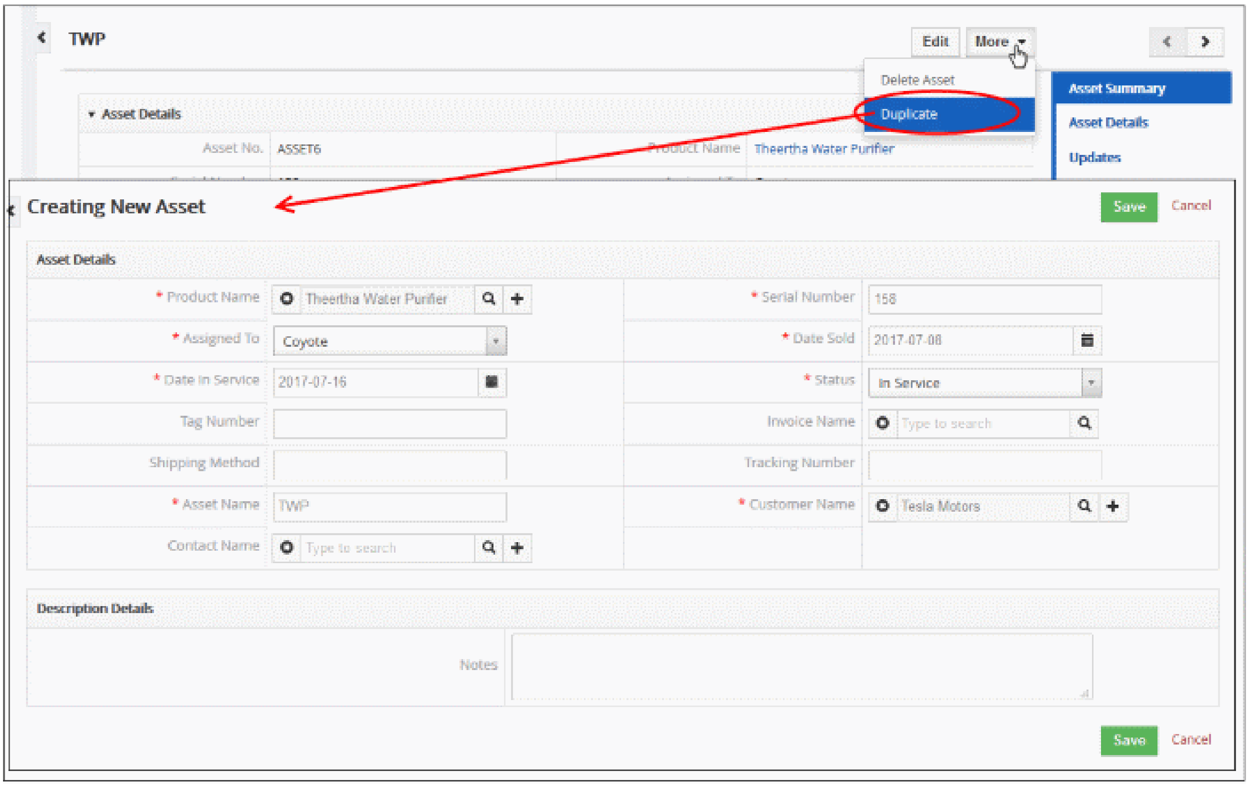
The record will be saved and added to the list of asset records in the 'Assets' interface. You can open the summary interface for the record by clicking the asset name and add/edit the details as required at anytime.

Clone an Asset

CRM allows you to create a new asset record using an existing record as a template. You can then edit the cloned record as required.

To clone an asset record

- Click 'All' on the title bar and choose 'Asset' under 'Inventory' to open the 'Asset List' interface
- Click the name of the asset record you want to clone from the 'Asset Summary' interface
- Click 'More' on the top right and choose 'Duplicate'



The 'Creating New Asset' form will open with the details populated from the original record.

- Enter a details for the new asset
- Edit the details as required. Descriptions of the form parameters are available in the **table above**.
- Click 'Save'.

The asset record will be saved and added to the 'Assets' interface.

Import Assets

Another method of creating an asset is to import from a per-existing list of asset records.

To import asset records

- Click 'All' on the title bar and choose 'Asset' under 'Inventory' to open the 'Asset List' interface
- Click 'Actions' > 'Import'

Follow the on-screen instructions to import the desired asset. See '**Import and Export Records**' for more information.

Create an Asset from other Modules

You can also create new asset records from other modules. For example you can create an asset from an invoice record. See '**Associate Asset Records to an Invoice**' for more information.

4.1.2. Manage Assets

The 'Assets List' interface lets you view and update assets details, including contact information, shipping information, assigned staff and more.

To view an asset details:

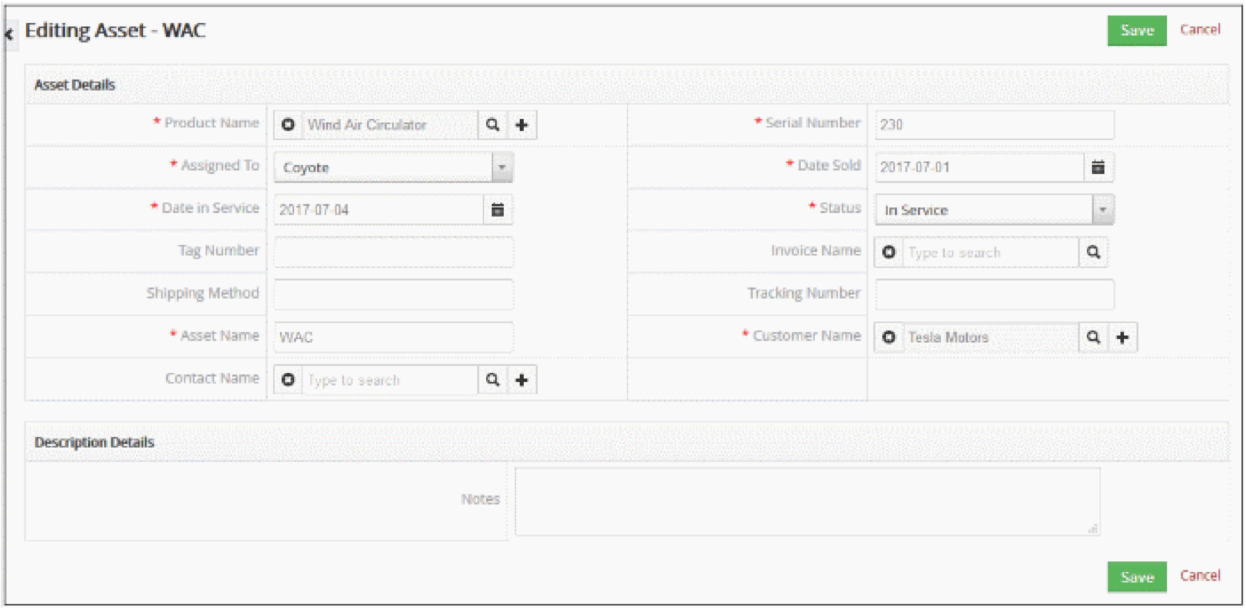
- Click 'All' > 'Assets' under 'Inventory' to open the 'Assets List' interface
- Click the asset name to open the 'Asset Summary' interface

You can edit an asset record in three ways:

- Click 'All' > 'Assets' to open the 'Assets List' interface
- Select the asset and then click the 'Edit' button from the 'Actions' menu

  OR
- Click the asset name and then 'Edit on the top right of the 'Asset Summary' interface

  OR
- Click 'All' > 'Assets' to open the 'Assets List' interface
- Place your mouse cursor anywhere in the asset record row to display the action buttons on the extreme right of the row.
- Click the 'pencil' icon to open the opportunity edit interface:



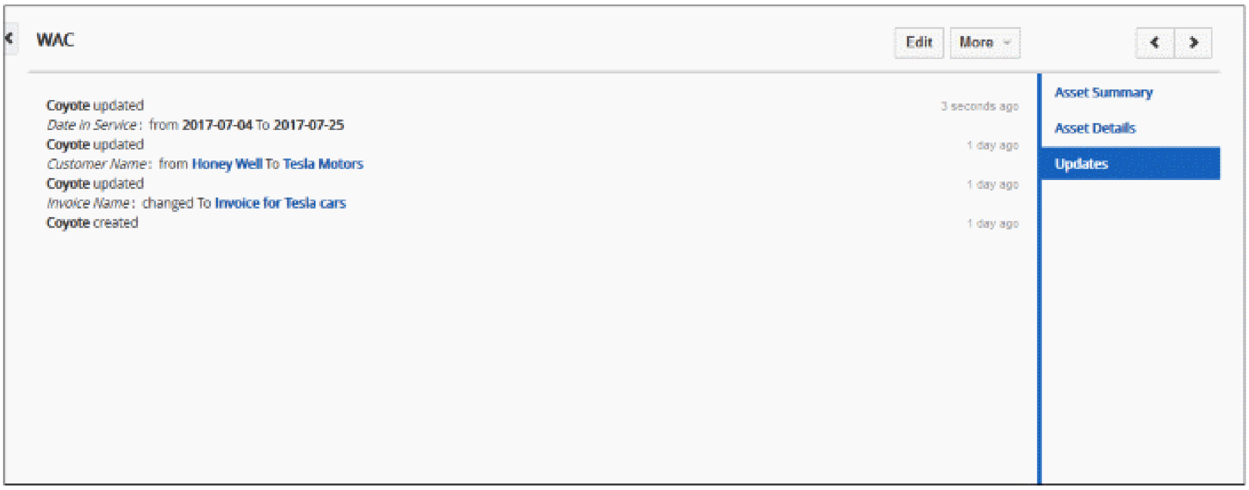
- See **this table** for descriptions of the fields in the 'Asset Details' interface
- Update the asset details as required and click 'Save'

Updates

The 'Updates' section shows a history of changes related to the asset. Example updates include if asset details are changed or if the asset is reassigned.

To view asset record updates:

- Click 'All' > 'Assets' under 'Inventory' to open the 'Assets List' interface
- Click the asset name to open the 'Asset Summary' interface
- Click 'Updates' on the right side menu



Full information about the updates to the asset record will be displayed.

4.1.3. Mass Management of Assets

You can edit, delete and add comments for several asset records at once. This is useful when you are updating or altering details that are common to a set of asset records. For example, you may have several asset records concerning different products, but would like all of them to use a common shipping method or be assigned to the same staff member.

Tip: If you want to update the details of a *single* asset record:

- Open the 'Assets List', click the asset name then click the 'Edit' button.
- See '**Manage Assets**' for more details.

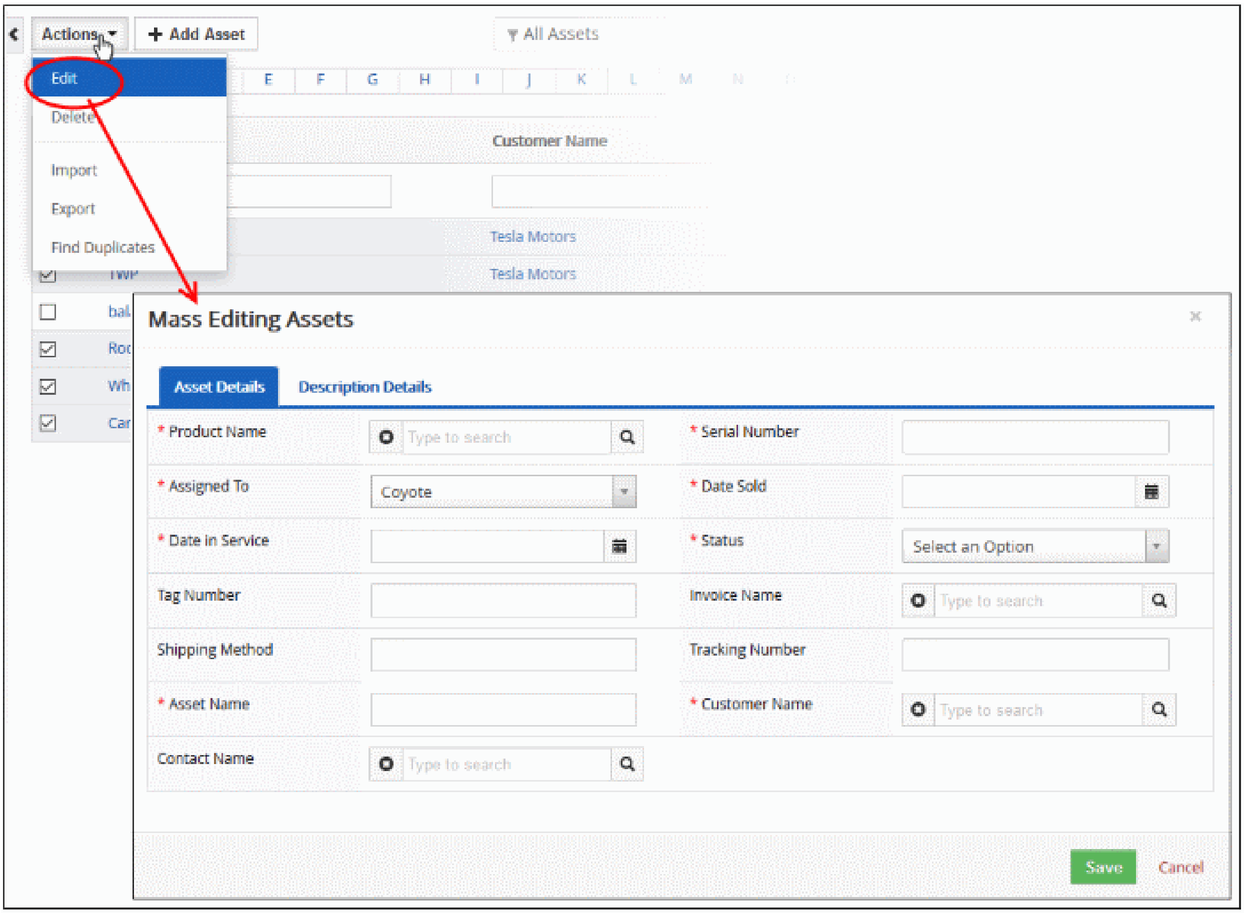
The interface allows you to:

- **Edit asset records**
- **Delete asset records**
- **Import / Export asset records**
- **Find duplicates**

To edit common details of several asset records

- Click 'All' > 'Assets' (under 'Inventory') to open the 'Assets List' interface
- Select the asset records to be edited
- Click 'Actions' and choose 'Edit'

The 'Mass Editing Assets' pop-up will appear:



This interface contains two tabs:

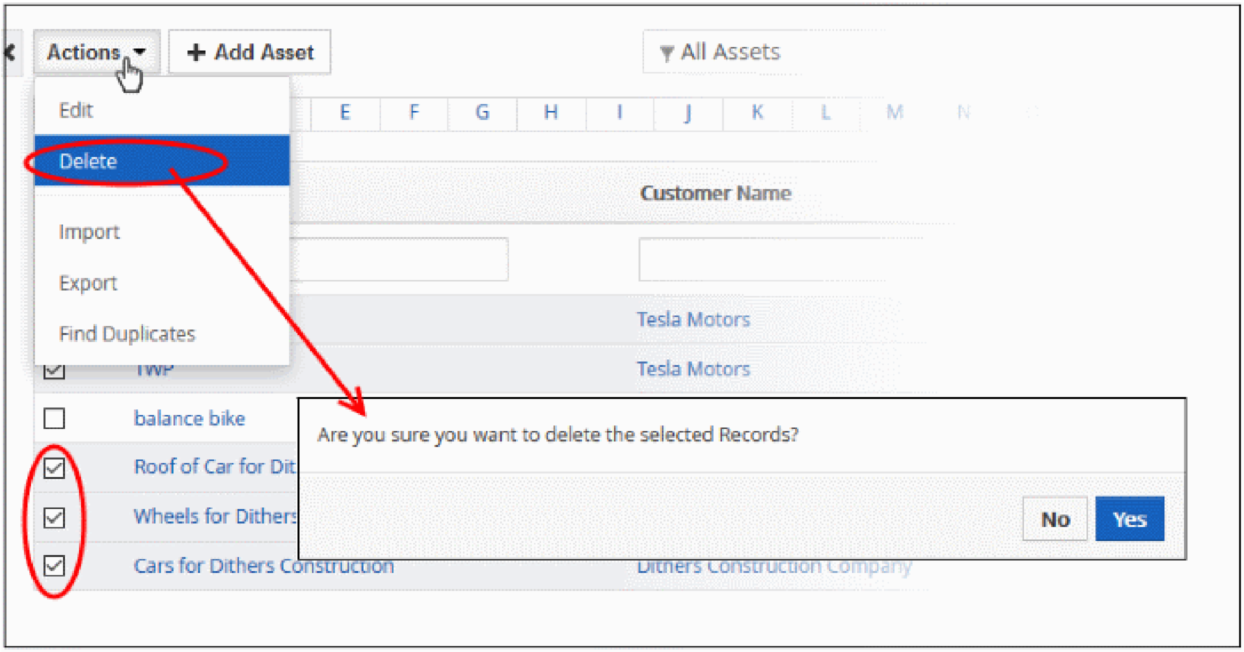
- Asset Details - Allows you to specify product name, shipping method, contact name and more. See **this table** for descriptions of the fields in the 'Asset Details' tab.
- Description Details - Allows you to enter a common description for the selected assets.

Click 'Save'.

To delete asset records

Asset records that are no longer required can be removed.

- Click 'All' > 'Assets' (under 'Inventory') to open the 'Assets List' interface
- Select the asset records to be edited
- Click 'Actions' and choose 'Delete'



- Click 'Yes' in the confirmation dialog to remove the record(s)

To import / export asset records

Export:

- Click 'All' > 'Assets'
- (Optional) Select the assets you wish to export
- Click 'Actions' > 'Export'
- Choose whether to export selected records, all visible records or all records
- Click 'Export Asset'.
- Assets are exported in .csv format

Import:

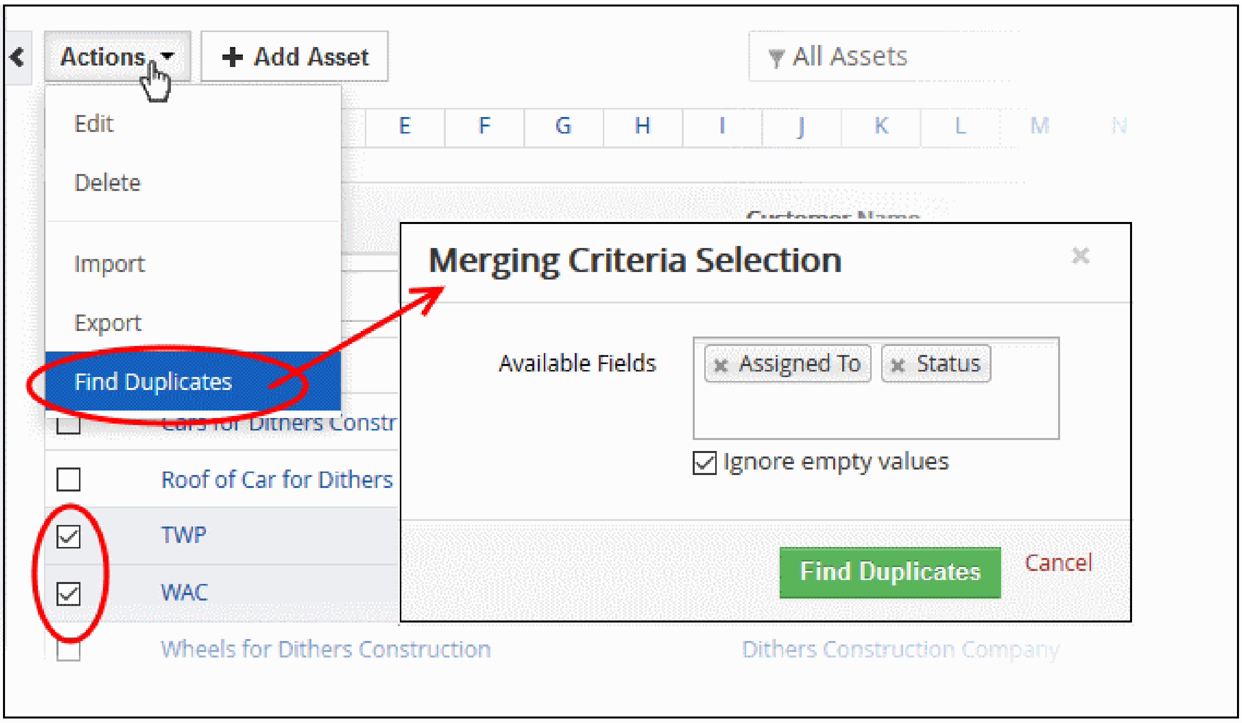
- Click 'All' > 'Assets'
- Click 'Actions' > 'Import'
- Browse to the file containing your asset records
- Specify the format of your file
- Click 'Next' to begin the import.

See '**Import and Export Records**' for more information.

To find duplicates

You can find duplicates from multiple asset records at once.

- Click 'All' > 'Assets' (under 'Inventory') to open the 'Assets List' interface
- Click 'Actions' and choose 'Find Duplicates'



- Click in the 'Available Fields' box and choose the assets related fields from the drop down. 'Ignore empty values' means the CRM will not consider matching blank fields as indicating a duplicate.
- Click 'Find Duplicates'
- To delete a duplicate assets record, select it and click the delete button on the top left.
- To merge duplicate records, select them in the 'Merge Select' rows and click 'Merge'
- The selected 'Record #' is the primary record. Select other record to change the primary record.
- Select the column values that should be retained in the merged primary record. Please note you can select only one column value for the merged record.
- Click 'Merge'. The records will be merged and displayed in the 'Assets List' page as per the selected column values.

4.2. Products

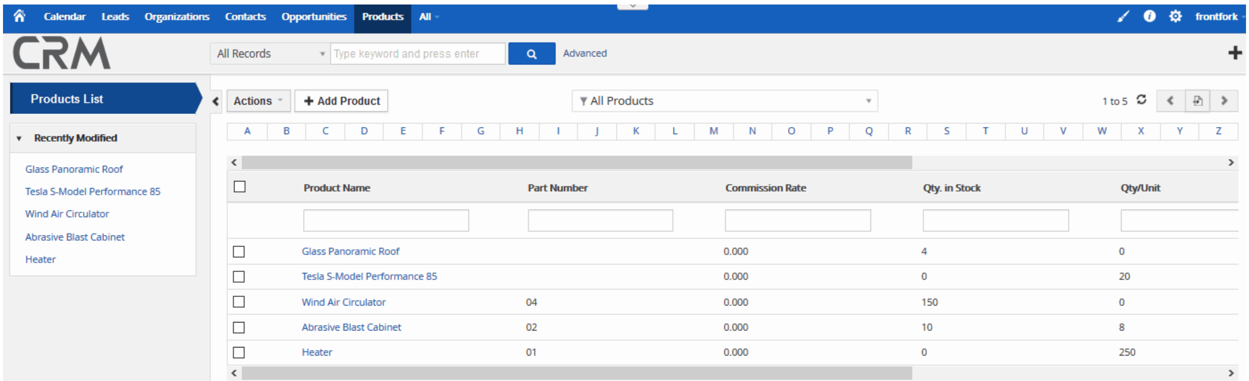
Products represent a stock of goods in your Inventory that are sold / procured by your organization. Products module allows you to:

- Manage products sold by your organization
- Manage products procured from suppliers
- Act as a bridge between sales and purchase departments

To open the 'Products' interface:

- Click the 'Products' button on the top navigation

  OR
- Click 'All' > 'Products'



Left-hand menu:

- 'Products List' shows all products added to the CRM. Click any product to open its details page.
- The 'Recently Modified' tab lists products which were recently updated.

Products List - Column Descriptions	
Column Header	**Description**
Product Name	The name of the product
Part Number	The part number of the product
Commission Rate	Commission paid / received for the product from the suppliers
Qty. in Stock	Number of units in stock
Qty / Unit	Number of pieces / area / cartoons that represents a unit
Unit Price	Cost of the product per unit

- Click any column header to sort the table according to the items in the column.
- To search for a specific item, enter the search criteria in the respective column header(s) and click 'Search' at the right end of the column header.
- For more details on advanced filter options, see '**Custom Views**'.

Custom Filter View

- The 'Products' interface allows you to create custom views. For example, you may want to view only those products assigned to you, and only view selected columns such as support start date, support end date and so on.
- You can create any number of views, and can make any view your default. See '**Custom Views**' for more details.

The following sections explain more about:

- **Add a Product**
- **Manage Products**
- **Associate Records from other Modules to a Product**
- **Mass Management of Products**

4.2.1. Add a Product

The product interface allows you to add and keep track of products that are bought and sold.

There are five possible ways to create a product record:

- Create a new product record - Click 'All' > 'Products' > 'Add Product'. See '**Create a New Product Record**' for more information.
- Quick create a record - Add a new product record with the minimum required information. Other details can be added later as required. See '**Quick Create a Product Record**' for details.
- Clone a record - Duplicate an existing product record to use as the starting point of a new product. See '**Clone a Product Record**' for more information.
- Import product records - Import a list of product records from a .csv or .vcf file. See '**Import Product Records**' for details.
- Create a product record from within another module (organizations, contacts etc). See '**Create a Product Record from other Modules**' for more information.

Create a New Product Record

- Click 'All' then 'Products' (under 'Inventory'), or click 'Products' on the title bar
- Click the 'Add Product' button
- The 'Create New Product' page will open:

Creating New Product - Form Parameters	
Form Parameter	**Description**
Product Details	
Product Name	Specify the product name. This field is mandatory.
Product Active	Indicates whether the product is in production or not
Part Number	Enter the part number of the product
Sales Start Date	Select the sales start date from the calendar
Manufacturer	Select the product manufacturer from the drop-down. To add more or remove manufacturer from the list contact, your administrator.
Product Category	Select the product category from the drop-down. To add more or remove a product category from the list, contact your administrator.
Support Start Date	Select the support start date for the product from the calendar.
Sales End Date	Select the sales start date for the product from the calendar.
Support Expiry Date	Select the support end date for the product from the calendar.
Vendor Name	Name of the supplier \ vendor.
Website	The website of the vendor.
Vendor Part No.	Part number provided by the vendor for the product.
Mfr. Part No.	Part number provided by the manufacturer for the product.
Product Sheet	Enter the product information

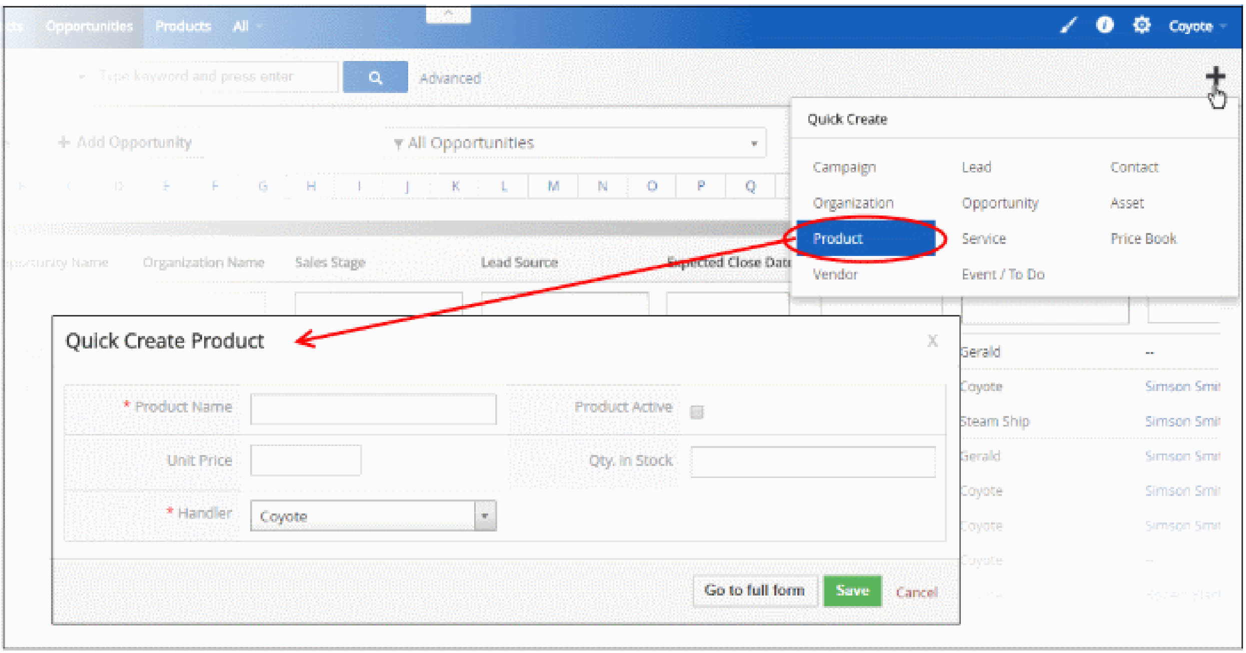
Serial No	Enter the serial number of the product
GL Account	Select the account from the drop down. To add or remove an item from the list, contact your administrator.
Pricing Information	
Unit Price	Cost of the product per unit. Click 'More Currencies' to change the currency. You can manage currencies by clicking the gear icon on the top right, 'CRM Settings' > 'Other Settings' > 'Currencies'
Commission Rate	The commission paid to the supplier \ vendor for purchasing the product
Taxes	The applicable taxes for the product. The enabled tax fields will be shown. You can manage taxes by clicking the gear icon on the top right, 'CRM Settings' > 'Other Settings' > 'Calculations'
Stock Information	
Usage Unit	Select the unit for the product.
Qty / Unit	Enter the number of (pieces, area, packs and so on) that represent a unit.
Qty. in Stock	Number of items that are currently available.
Reorder Level	Enter the number that when reached, the product has to be ordered.
Handler	The user and user group that is responsible. Contact your administrator to add / remove users / groups from the list.
Qty. in Demand	The number of units that are to be supplied to customers.
Product Image Information	
Product Image	The image of the product. Click 'Choose File', navigate to the stored location and click open.
Description Details	
Description	Enter any information and directions you would like to add about the product.

- Click 'Save'. The product will be saved and added to the list in the 'Products List' interface

Quick Create a New Product Record

The 'Quick Create' option allows you to create a product record from any interface. It requires you to enter only basic details. You can add more details by clicking 'Go to full form'. You can, of course, also edit the record at a later date to add more information.

- Click the '+' button at the top right from any interface of CRM and choose 'Product' from the options.



- Fill-in the product details in the 'Quick Create Product' dialog. Descriptions of the form parameters are available in **this table**.
- If you want to view and enter all details, click 'Go to full form'.
- Click 'Save'

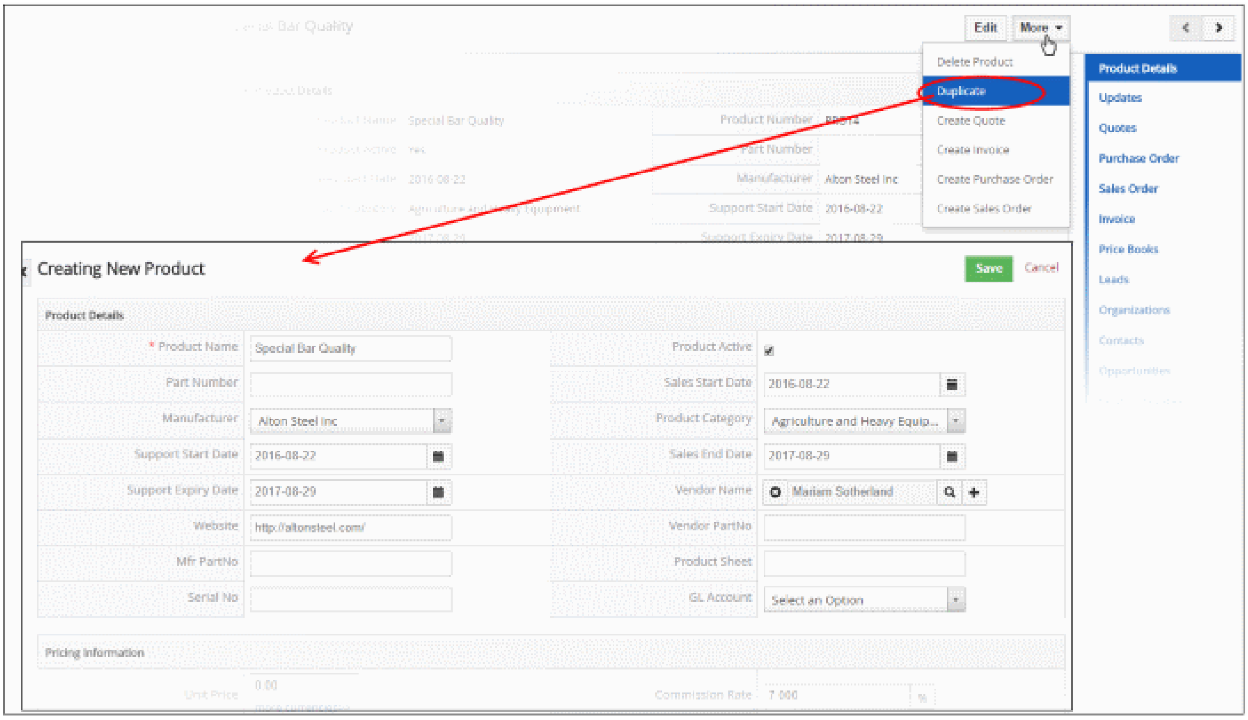
The record will be saved and added to the list of asset records in the 'Products List' interface. You can open the details interface for the record by clicking the product name and add/edit the details as required at anytime.

Clone a Product Record

CRM allows you to create a new product record using an existing record as a template. You can then edit the cloned record as required.

To clone a product record

- Click 'All' on the title bar and choose 'Product' under 'Inventory' to open the 'Products List' interface
- Click the name of the product record you want to clone from the 'Product Details' interface
- Click 'More' on the top right and choose 'Duplicate'



The 'Creating New Product' form will open with the details populated from the original record.

- Enter a details for the new product.
- Edit the details as required. Descriptions of the form parameters are available in the **table above**.
- Click 'Save'.

The product record will be saved and added to the 'Products List' interface.

Import Product Records

Another method of creating a product record is to import from a per-existing list of product records.

To import product records

- Click 'All' on the title bar and choose 'Product' under 'Inventory' to open the 'Products List' interface
- Click 'Actions' > 'Import'

Follow the on-screen instructions to import the desired product records. See '**Import and Export Records**' for more information.

Create a Product from other Modules

You can also create new product records from other modules. For example you can create a product from an contact record. See '**Associate Records from other Modules to a Contact**' for more information.

4.2.2. Manage Products

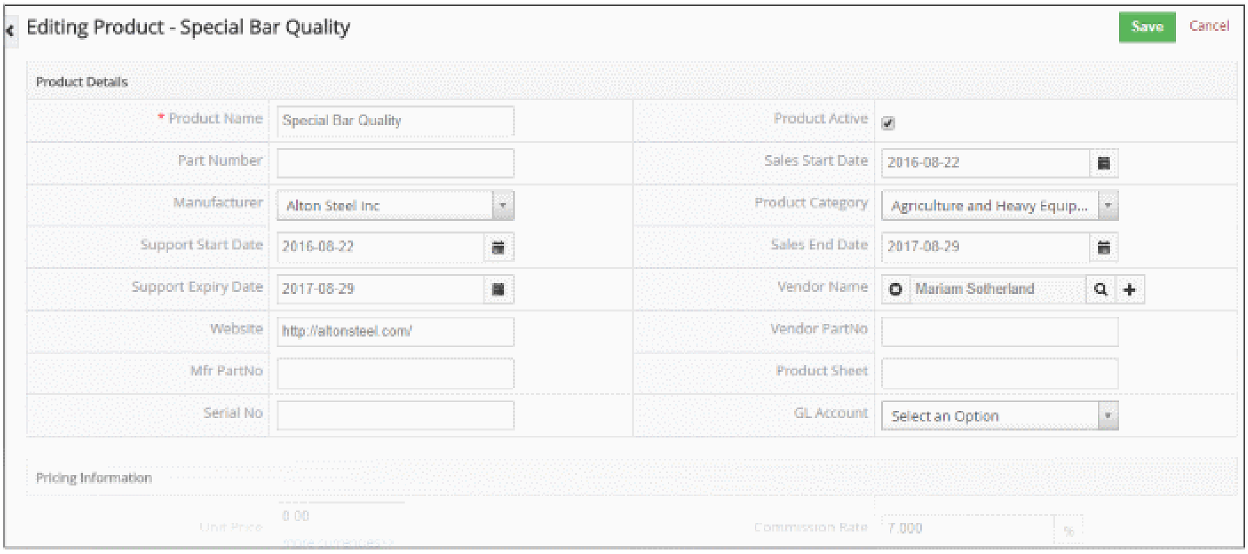
- The 'Products List' interface displays the products in the inventory. Key information is also shown for each product, including part number, commission rate, unit price and so on.
- Click on a product then click 'Edit' to update the product as required. The editing interface also allows you to view previous updates to the product.
- You can bundle multiple products per your sales requirement.
- You can associate records from other modules to a product. Other modules include organizations, quotes, sales orders, invoices and more.

To view product details:

- Click 'All' > 'Products' to open the 'Products List' interface
- Click on a product to open its details page

To edit a product:

- Click 'All' > 'Products' to open the 'Products List' interface
- Click on a product's name and then the 'Edit' button at the top right of the 'Product Details' interface.
  OR
- Click 'All' > 'Products' to open the 'Products List' interface
- Place your mouse cursor over the name of a product to reveal the action buttons on the right of the row.
- Click the 'pencil' icon to open the product edit interface:



- See **this table** for descriptions of the fields in the 'Product Details' interface

The links on the right of a product detail page let you view and manage the following items:

- Product Details - Shows complete product details
- Updates - Track all modifications done on the product record
- Modules - Allows to view the records of other modules that are linked to the product record. You can also link a new record from the modules. See '**Associate Records from other Modules to a Product**' for more information.
- Product Bundles - View the products that are bundled to this product. You can also bundle more products by clicking 'Select Products' and 'Add Product' buttons. See '**Project Bundles**' for more information.
- Parent Product - Allows to view the product to which it is bundled.

The interface allows you to:

- Select a desired product record
  - Click 'Edit' to modify a product information
- 'More' menu:
  - 'Delete Product' to delete product record
  - 'Duplicate' to clone the record to use it as the basis of a new product. See '**Clone a Product Record**' to find out more.
  - 'Create Invoice' to create an invoice for the product record. See '**Creating an Invoice**' to know more.
  - 'Create Sales Order' to create a sales order for the product record. See '**Add a Sales Order**' to know more.

- 'Create Purchase Order' to create a purchase order for the product. See '**Add a Purchase Order**' for more information.
- 'Create Quote' to create a quote for the product record. See '**Create Quotes**' for more details.

Product Bundles

This feature helps you to have sub-products for products. While creating Sales Orders, Purchase Orders, Invoices and Quotes, upon selecting parent product, all sub-products are automatically selected into the cart.

To select sub-products under parent product

- Click 'Products' tab and select the desired product. (The parent product)
- In the detail view of parent product, click 'Product Bundles' in the right
- Click 'Select Products' or 'Add Product' to select from the existing products or create a new product respectively

After successfully creating a product bundle, the parent product and sub-products under it are ready for selection under Invoices, Purchase Order, Sales Order and Quotes.

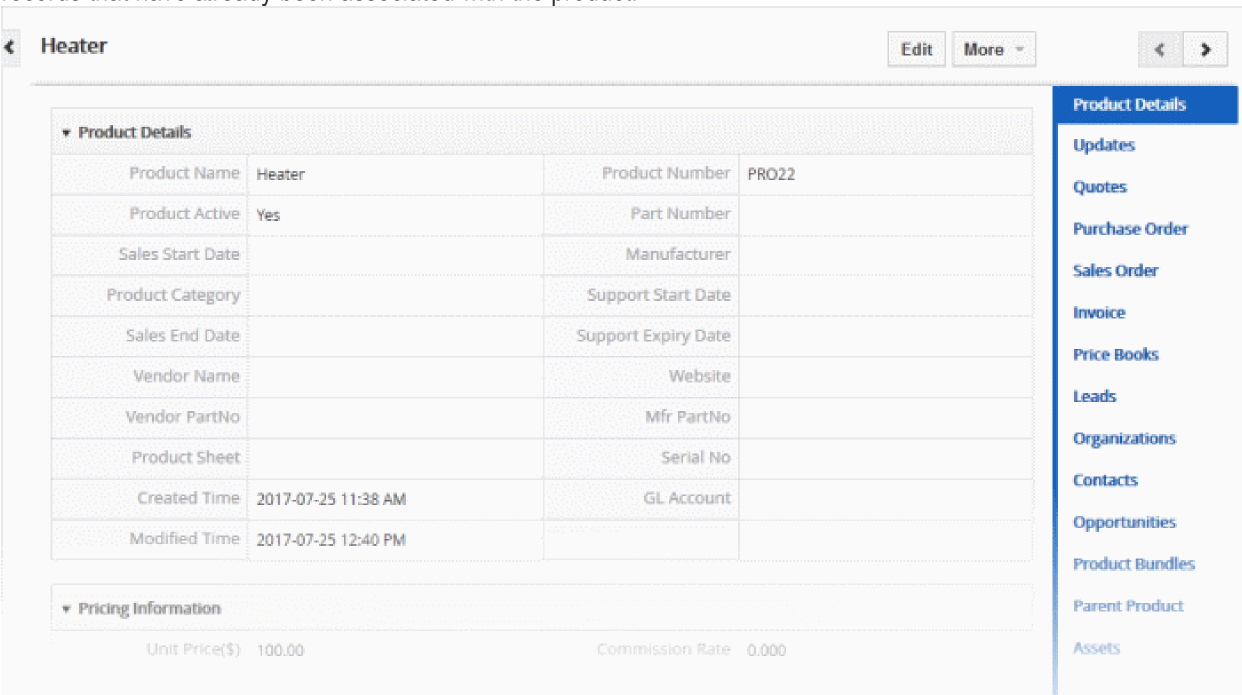
4.2.3. Associate Records from other modules to a Product

Associating records from other modules to a product allows you to improve visibility and workflows and keep track of activities relating to the product. Associating a product with a sales order, quickly informs staff members which of your offerings are listed to create an invoice

To view, add and manage associated records:

- Click 'All' > 'Products'
- Click any product record to open its detail page

The menu on the right shows modules that can be associated with the product. Click any of these links to view records that have already been associated with the product:



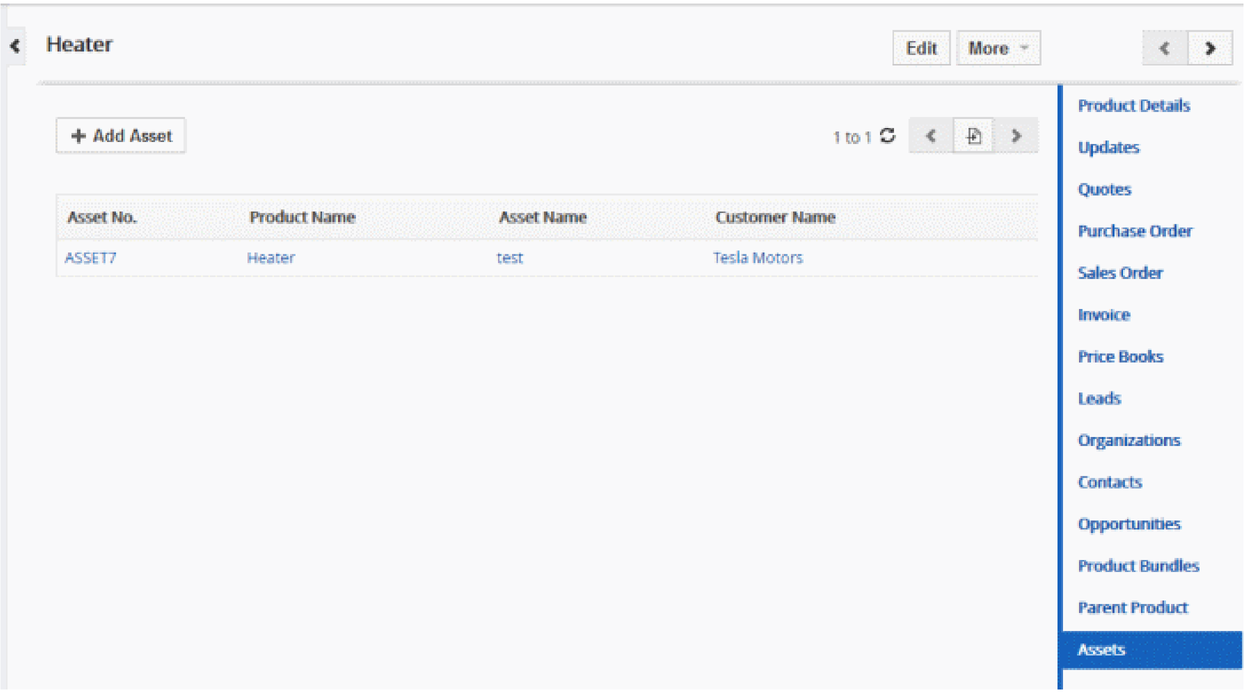
You can use these links to create records in the other modules which will be linked to the product.

You can associate following records with a product:

- Quotes - View existing quotes associated with the product. Generate a new quote for the product.
- Purchase Order - View associated purchase order for the product record
- Sales Order - Generate the sales order for the product record
- Invoice - Generate the invoice for the sales order generated for the product record
- Price Books - Add a price book to the product. This will help you while generating Commercial documents like Invoice and Quotes
- Leads - Associate the existing lead to the product record
- Organizations - Associate the existing organizations to the product record
- Contacts - Associate the existing contact to the product record
- Product Bundles - Feature to have sub-products for products and select the products into cart when creating an sales order, Purchase order, invoice or quote based on the hierarchy
- Parent Product - View and add a product family and classify similar products in it
- Assets - View and create assets related to the product

The example below describes how to view and manage the 'Product' records associated with 'Assets'. A similar process can be followed to associate other module types.

- Click 'All' > 'Product'
- Click on a product in the list then click 'Assets' on the right



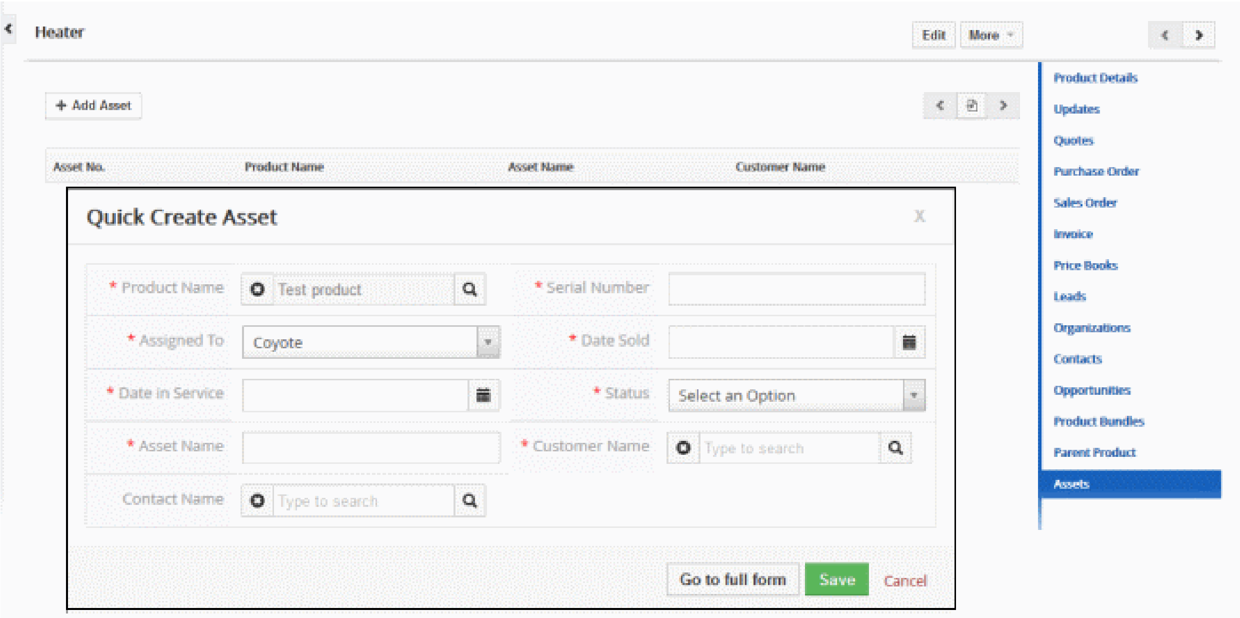
The interface allows you to:

- **Associate new product record with assets**
- **Manage associated product records**

Associate product Records with an asset

As mentioned earlier, open a product record then click 'Assets' on the right.

- Click the 'Add Asset ' button.
- This will display a 'Quick Create Asset' dialog where you can enter basic asset details:

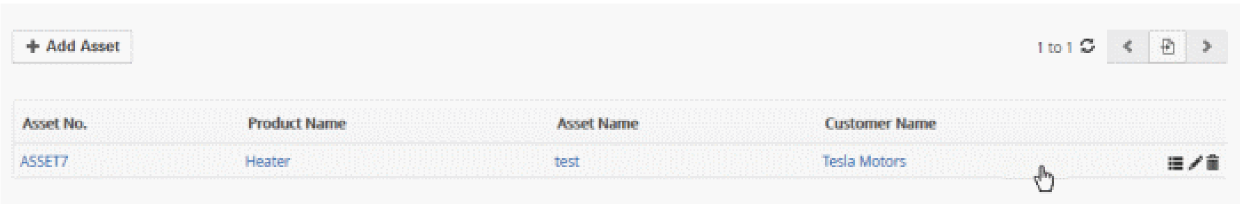


The asset will be added to the list of 'Assets' associated with the record. Deleting this record will dissociate the asset record from this list.

Manage Associated Product Records

The associated product modules lets you view and edit product details, and dissociate assets.

- Mouse over a asset record to view the options at the far right end of the row



- The following options are available:

  - Opens the asset details interface of the respective asset record. See '**Assets**' for more details.

  - Allows you to edit the asset details. See '**Assets**' for more details.

  - Removes the association between the asset and the product. Note, this doesn't remove the service itself, which will remain available in the '**Assets**' module.

In the similar manner you can associate and manage records from other modules that are listed on the right.

4.2.4. Mass Management of Products

You can edit / delete / import / export / de-duplicate various product records at once. You can do this when you are updating details that are common to a set of product records. For example, you may have a category of products which need stock information to be revised as per available stock.

Tip: If you want to update the details of a single product record:

- Open the 'Products List', click the product name then click the 'Edit' button.
- See '**Manage Products**' for more details.

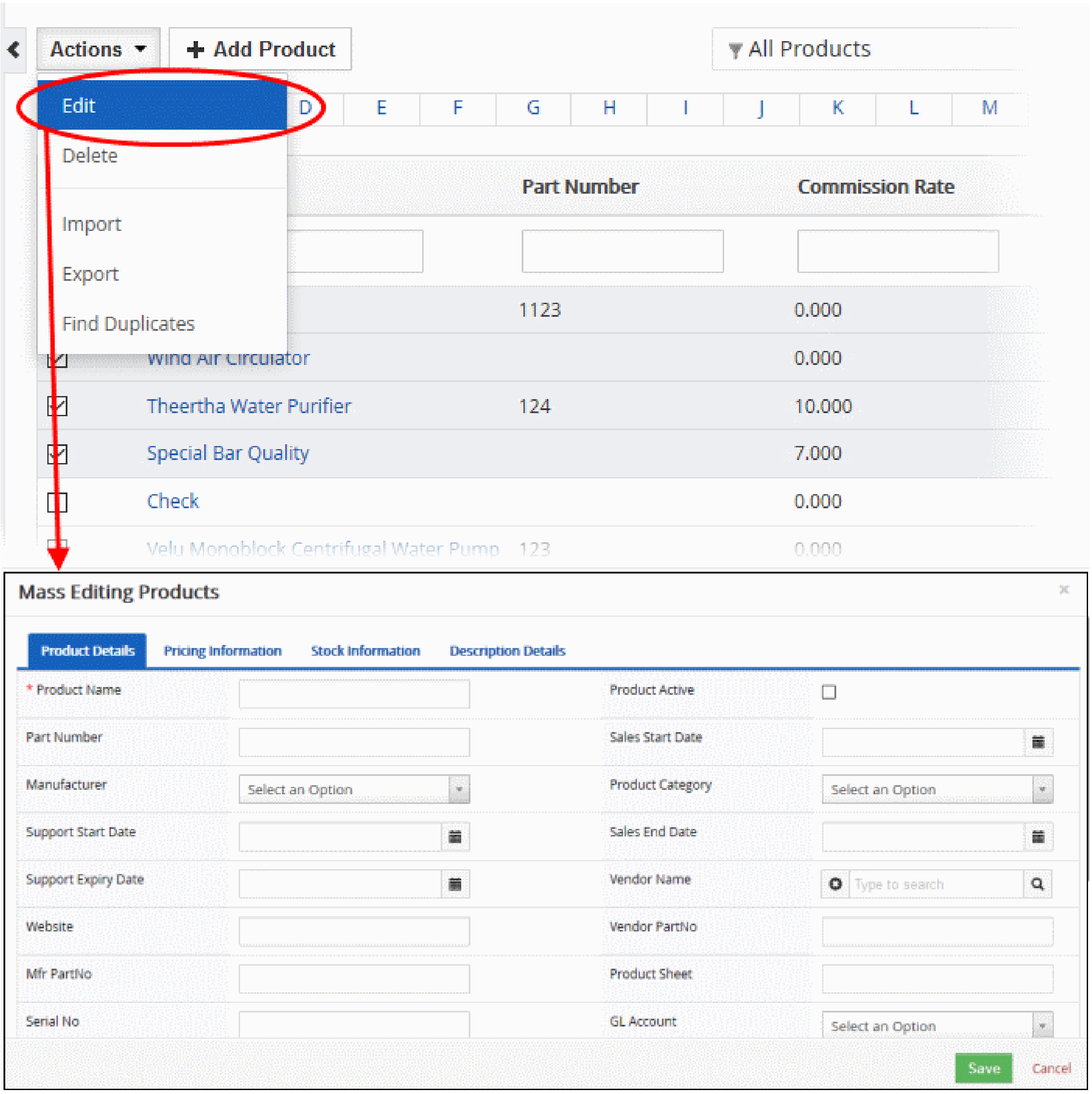
The interface allows you to:

- Edit product records
- Delete Product records
- Import / export product records
- Find duplicate product records

To edit common details of several product records

- Click 'All' > 'Products' (under 'Marketing and Sales') to open the 'Products List' interface
- Select the product to be edited
- Click 'Actions' and choose 'Edit'

The 'Mass Editing Products' pop-up will appear:



This interface contains four tabs:

- Products Details - Allows you to specify subject, contract name and more. See this table for descriptions of the fields in the 'Products Details' tab.

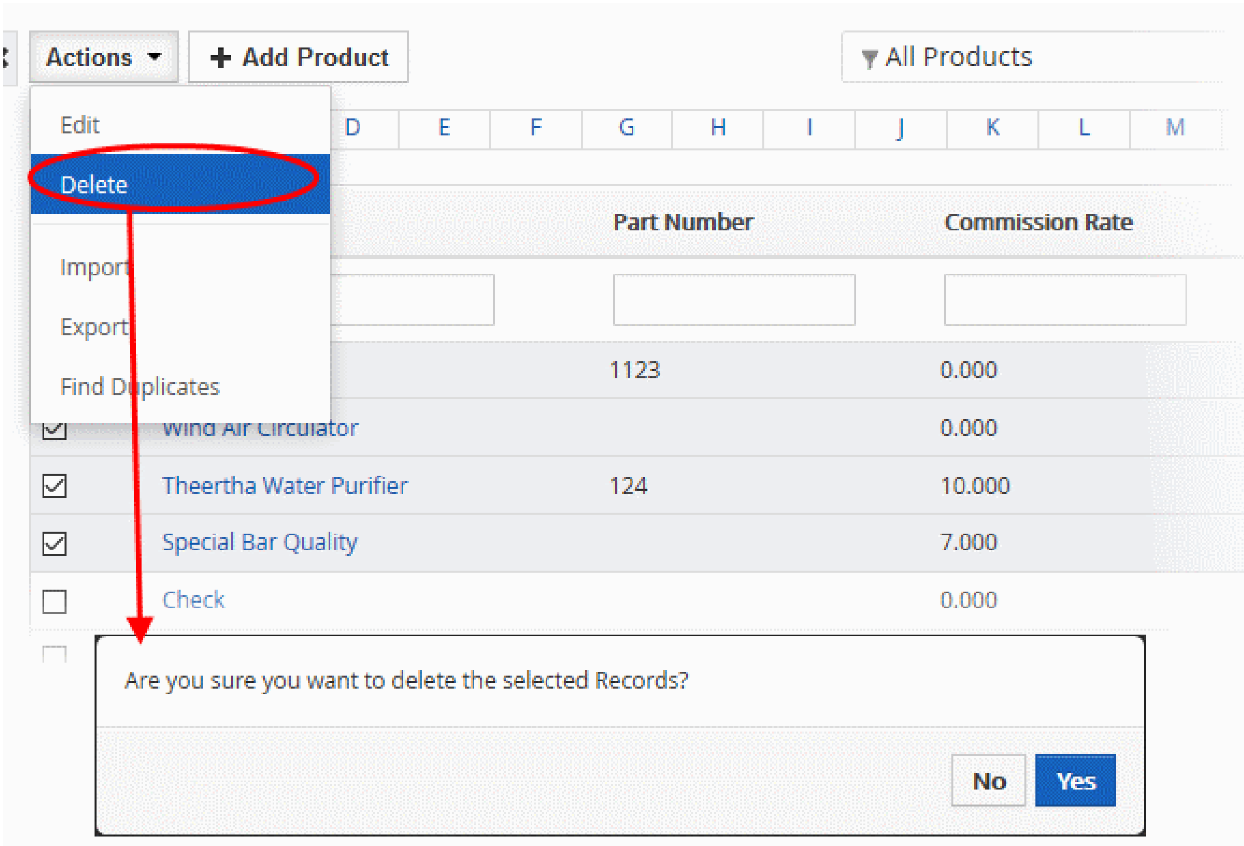
- Address Details - Allows you to enter the values for billing and shipping addresses in the selected product records. See **this table** for descriptions of the fields in the 'Address Details' tab.
- Terms & Conditions - Allows you to provide a common 'Terms & Conditions' for the selected product records.
- Description Details - Allows you to enter a common description for the selected product records.

Click 'Save'.

To delete product records

Product records that are no longer required can be removed.

- Click 'All' > 'Products' (under 'Marketing and Sales') to open the 'Product List' interface
- Select the product to be deleted
- Click 'Actions' and choose 'Delete' button.



- Click 'Yes' in the confirmation dialog to remove the record(s)

To import / export product records

Export:

- Click 'All' > 'Products'
- (Optional) Select the product you wish to export
- Click 'Actions' > 'Export'
- Choose whether to export selected records, all visible records, or all records
- Click 'Export Products'.
- Product are exported in .csv format

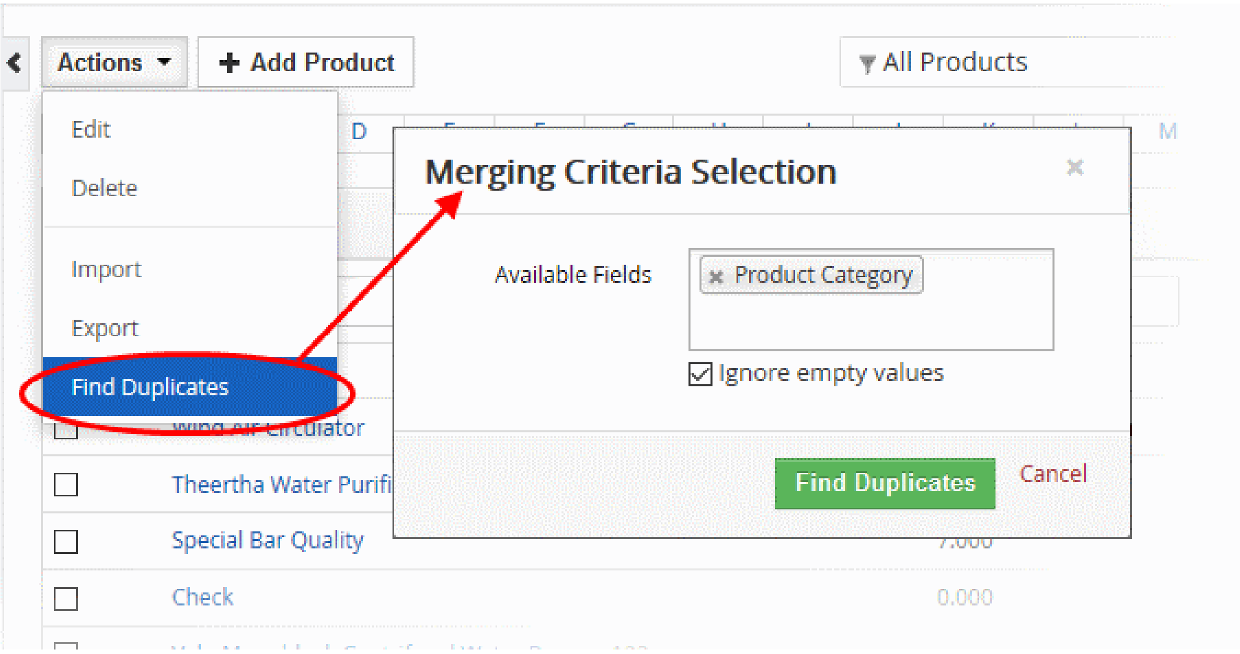
Import:

- Click 'All' > 'Products'
- Click 'Actions' > 'Import'
- Browse to the file containing your product records
- Specify the format of your file
- Click 'Next' to begin the import.

See '**Import and Export Records**' for more information.

To find duplicates

- Click 'All' > 'Products' (under 'Marketing and Sales') to open the 'Products' interface
- Click 'Actions' and choose 'Find Duplicates'



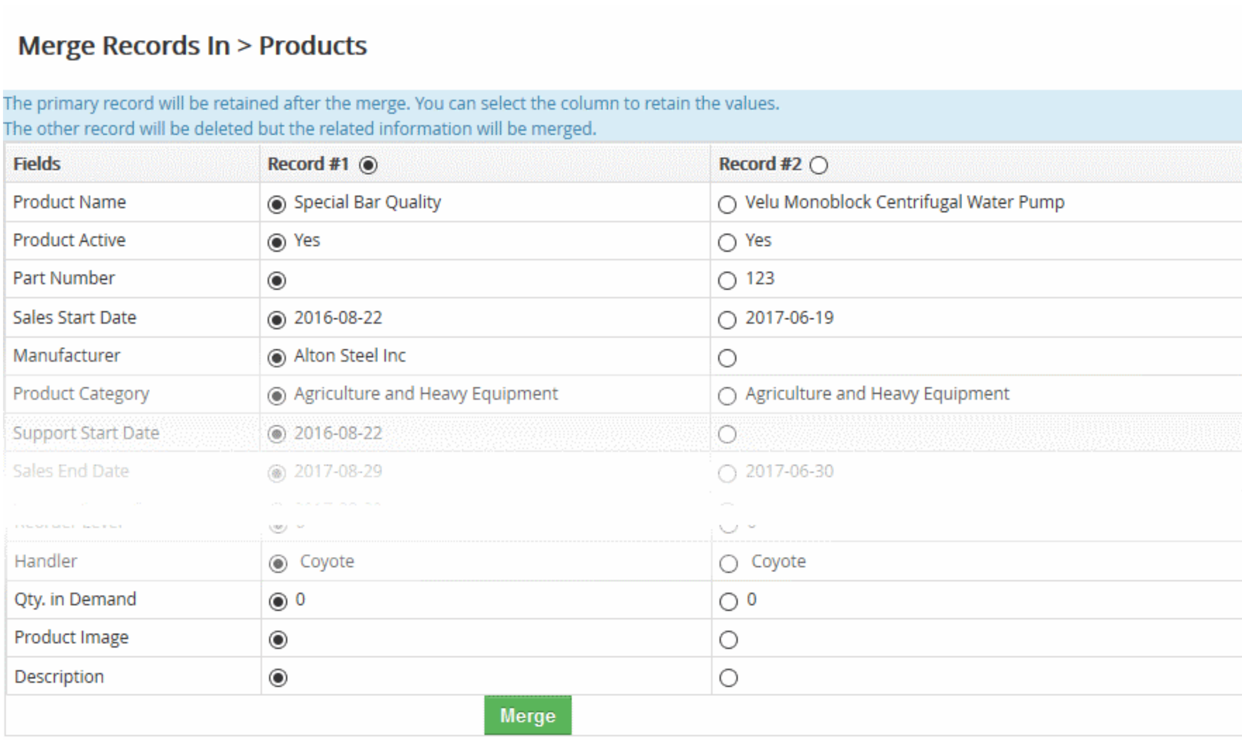
- Click in the 'Available Fields' box and choose the invoice related fields from the drop down. 'Ignore empty values' means the CRM will not consider matching blank fields to indicate a duplicate.
- Click 'Find Duplicates'

The 'Duplicate Products' page will be displayed.

- To delete a duplicate product record, select it and click the delete button on the top left.

- To merge duplicate records, select them from the 'Merge Select' column and click 'Merge'

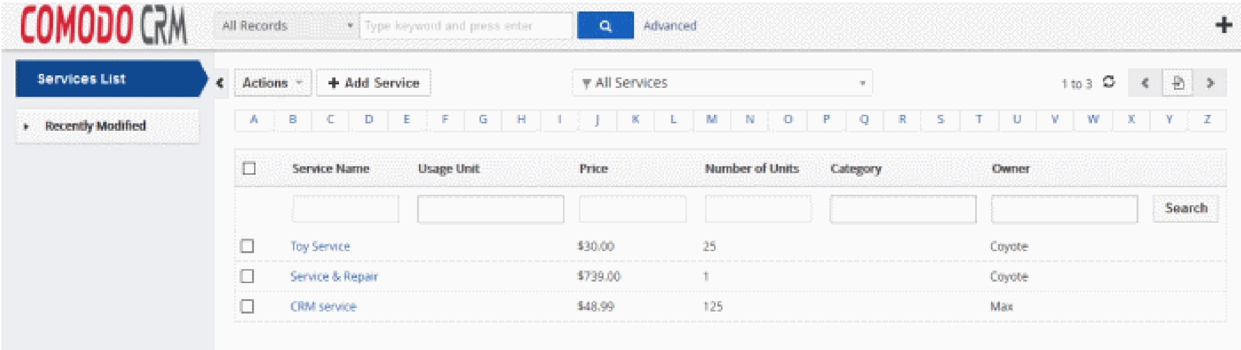
The 'Merge Records In > Products' dialog will be displayed:



- The selected 'Record #' is the primary record. Select other record to change the primary record.
- Select the column values that should be retained in the merged primary record. Please note you can select only one column value for the merged record.
- Click 'Merge'. The records will be merged and displayed in the 'Products List' page as per the selected column values.

4.3. Services

CRM allows staff to track routine maintenance or repair work on products for customers. Services see additional assistance or non-stock items you offer to your customers.



Click the links below for more details on the tasks executed in the 'Services' module:

- **Create services**
- **Manage Services**
- **Associate records from other modules to services**
- **Mass management of services**

4.3.1. Add Services

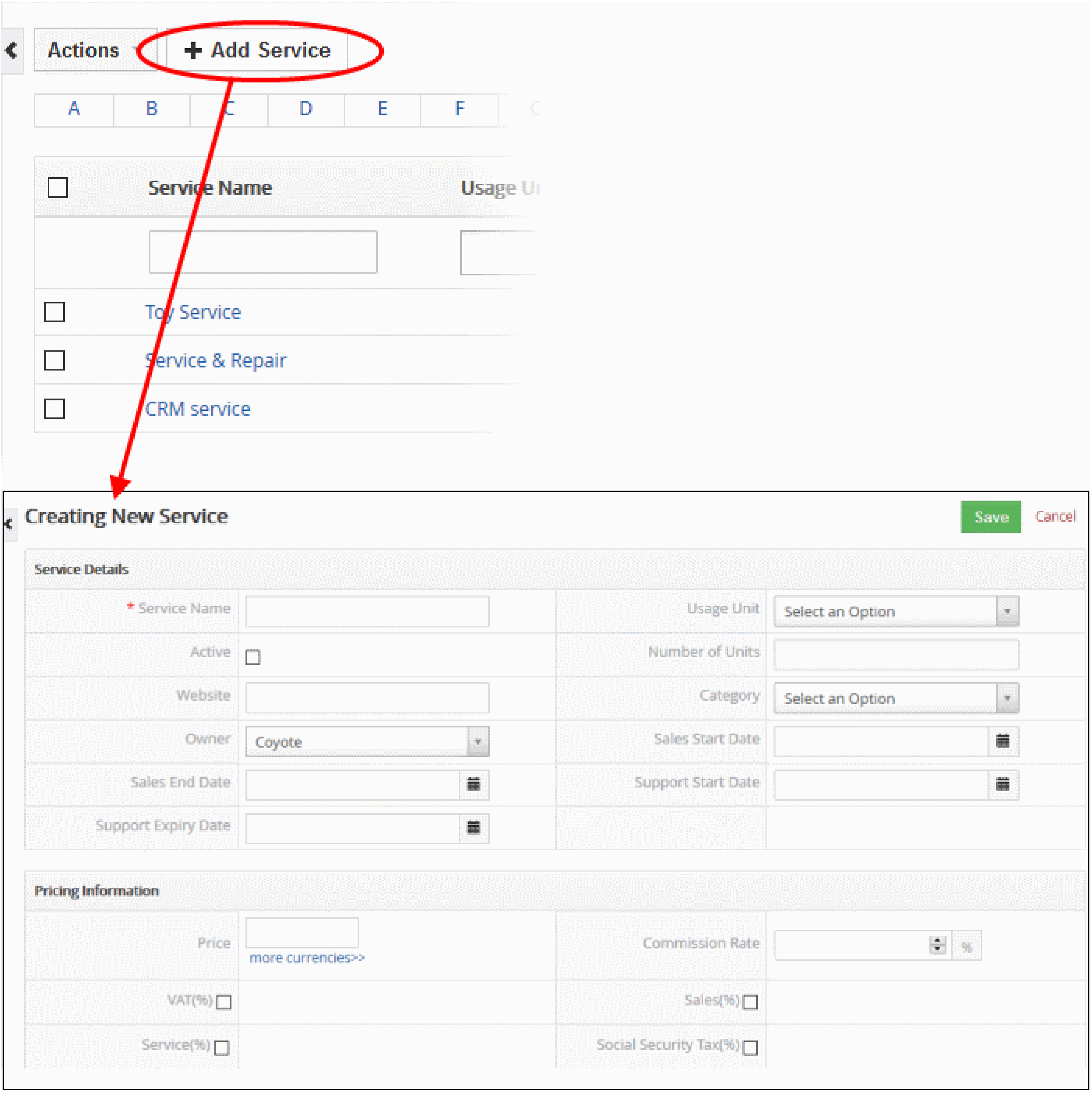
The services interface allows you to add and keep track of services that are required and rendered to customers.

There are four possible ways to create a service record:

- Create a new service record - Click 'All' > 'Services' > 'Add Services'. See '**Create a New Services Record**' for more information.
- Quick create a record - Add a new services record with the minimum required information. Other details can be added later as required. See '**Quick Create a Services Record**' for details.
- Clone a record - Duplicate an existing service record to use as the starting point of a new product. See '**Clone a Product Record**' for more information.
- Import Service records - Import a list of services records from a .csv or .vcf file. See '**Import Services Records**' for details.

Create a New Services Record

- Click 'All' > 'Services', or click 'Services' on the title bar
- Click the 'Add Service' button
- The 'Create New Services' page will open:



Create New Services - Form Parameters	
Form Parameter	**Description**
Services Details	
Services Name	Specify the service name. This field is mandatory.
Usage Unit	Choose whether the service is offered in hours, days or per incident
Active	Activate or deactivate the service in the CRM
Number of Units	Optional. If your service is measured in units, please specify how many units constitute one service offering.
Website	Specify the web site URL of the service
Category	Select the service category from the drop-down. Contact your administrator to add or remove a category.

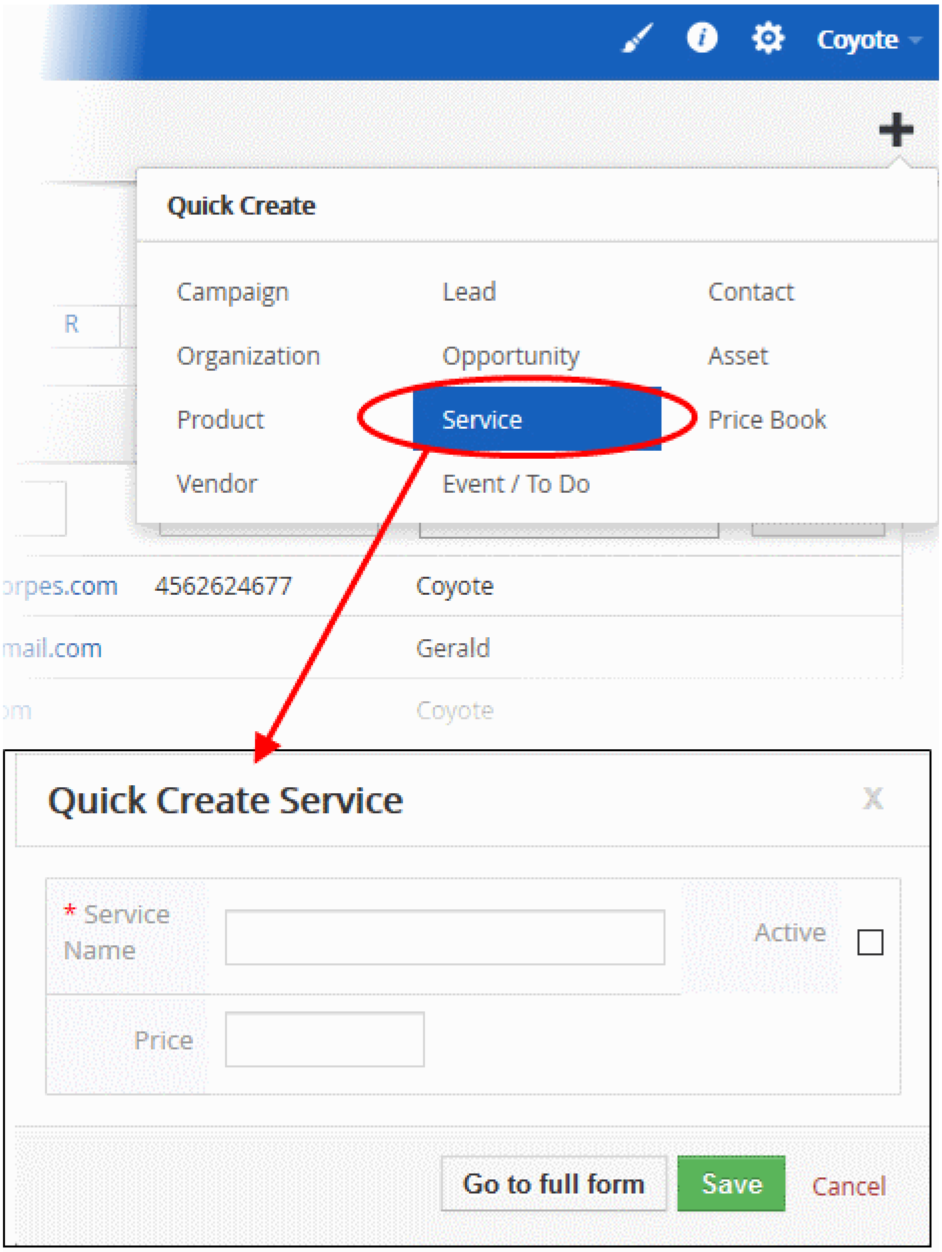
Owner	Select the name of the user or user group to whom the service should be assigned.
Support Start Date	Contracted start date for your support service.
Sales End Date	End of sales contract.
Support Expiry Date	Contracted end date for your support service.
Pricing Information	
Price	Cost of the service. Click 'More Currencies' to change the currency. You can manage currencies by clicking the gear icon on the top right, 'CRM Settings' > 'Other Settings' > 'Currencies'
Commission Rate	The commission paid to the supplier \ vendor for purchasing the service
Taxes	The applicable taxes for the product. The enabled tax fields will be shown. You can manage taxes by clicking the gear icon on the top right, 'CRM Settings' > 'Other Settings' > 'Calculations'
Description Details	
Description	Enter any information and directions you would like to add about the service.

- Click 'Save'. The product will be saved and added to the list in the 'Services List' interface

Quick Create a New Service Record

The 'Quick Create' option allows you to create a service record from any interface. It requires you to enter only basic details.

- Click the '+' button at the top right from any interface of CRM and choose 'Service' from the options.
- You can add more details by clicking 'Go to full form'. You can also edit the record at a later date to add more information.



- Complete the basic service details (service name, price, active/inactive)
- If you want to view and enter all details, click 'Go to full form'. Descriptions of the form parameters are available in **this table**.
- Click 'Save'

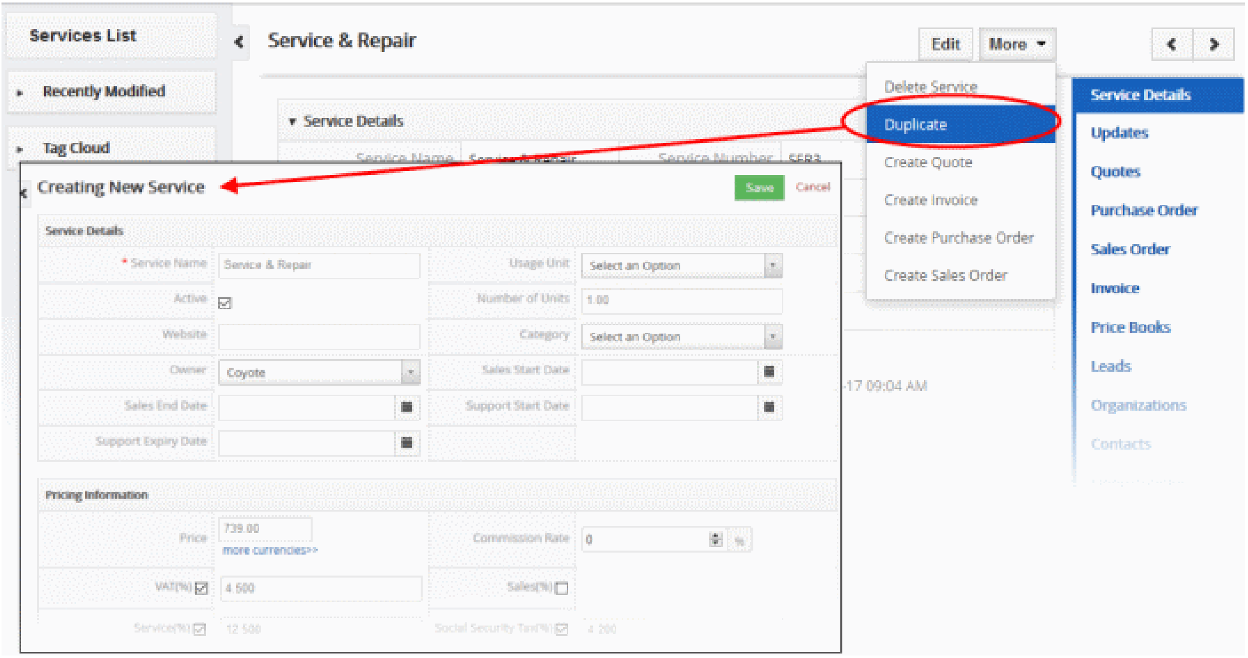
The service will be added to the list of records in the 'Service List' interface.

Clone a Service Record

CRM allows you to copy an existing service record to use as a template for a new record. You can then edit the cloned record as required.

To clone a service record

- Click 'All' > 'Services' to open the 'Service List' interface
- Click the name of the service record you want to clone
- Click 'More' at the top right and choose 'Duplicate'



The 'Create New Service' form will open with the details populated from the original record.

- Enter a details for the new service.
- Edit the details as required. Descriptions of the form parameters are available in the **table above**.
- Click 'Save'.

The service record will be saved and added to the 'Services List' interface.

Import Service Records

Another method of creating a service record is to import from a created list of service records.

To import services records

- Click 'All' > 'Services' to open the 'Services List' interface
- Click 'Actions' > 'Import'

Follow the on-screen instructions to import the desired services records. See '**Import and Export Records**' for more information.

4.3.2. Manage Services

- The 'Services List' interface displays all services add to the CRM inventory. Key information is also shown for each service, including service number, commission rate, price information and so on.
- Click on a service then click 'Edit' to update the service as required. The editing interface also allows you to view previous updates to the service.
- You can associate records from other modules to a service. Other modules include organizations, leads, contacts, opportunities and more.

To view service details:

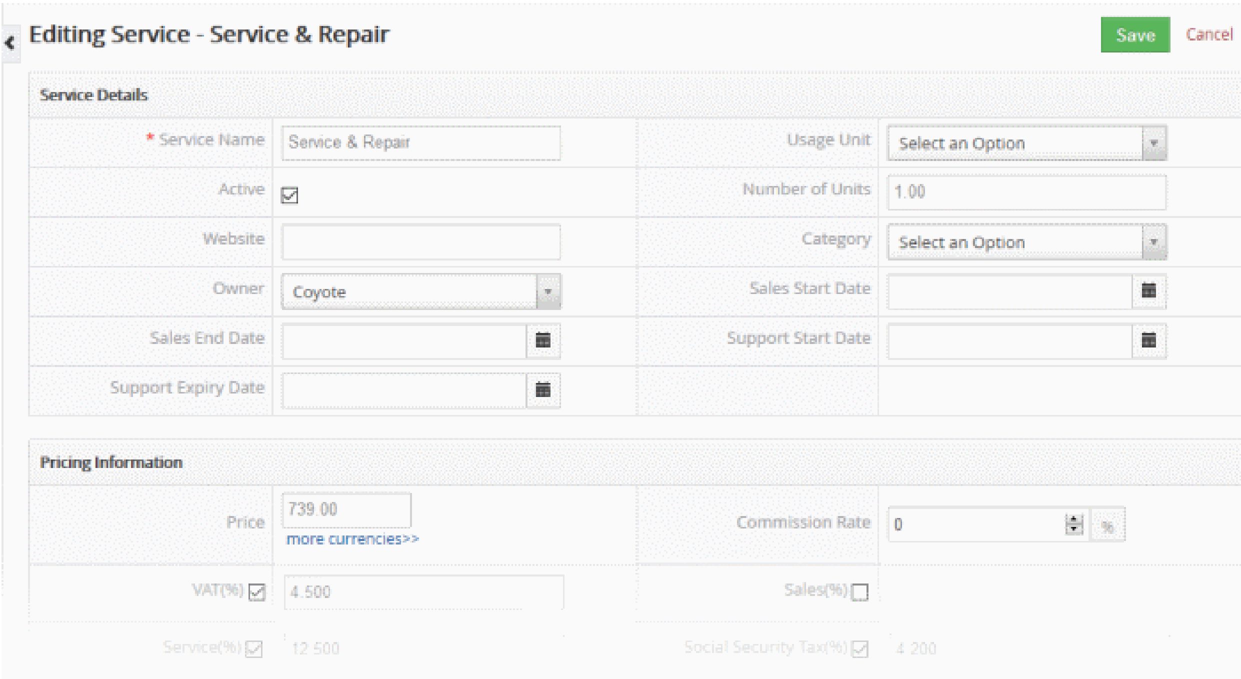
- Click 'All' > 'Services' to open the 'Services List' interface
- Click on a service to open its details page.
- Use the links on the right to view service updates and other CRM items that are associated with the service.

To edit a service:

- Click 'All' > 'Services' to open the 'Service List' interface
- Click on a service's name and then the 'Edit' button at the top right of the 'Service Details' interface.

  OR

- Click 'All' > 'Service' to open the 'Service List' interface
- Place your mouse cursor over the service name to reveal the action buttons on the right of the row.
- Click the 'pencil' icon to open the service edit interface:



- See **this table** for descriptions of the fields in the 'Services Details' interface

The links on the right of a services detail page let you view and manage the following items:

- Services Details - Shows complete service details
- Updates - Shows all modifications done to the service record
- Modules - View other records that are linked to the service. For example, quotes, invoices, leads, contacts and opportunities. You can also link new records to the service using these links. See '**Associate Records from other modules to Service**' for more information.

Click 'Edit' to modify service information:

'More' menu:

- 'Delete Service' to delete service record
- 'Duplicate' to clone the record to use it as the basis of a new product. See '**Clone a Product Record**' to find out more.
- 'Create Invoice' to create an invoice for the service record. See '**Create an Invoice**' to know more.
- 'Create Sales Order' to create a sales order for the product record. See '**Add a Sales Order**' to know more.
- 'Create Purchase Order' to create a purchase order for the product. See '**Add a Purchase Order**' for more information.
- 'Create Quote' to create a quote for the product record. See '**Create Quotes**' for more details.

Note: You can restore the accidentally removed service from the **Recycle Bin**.

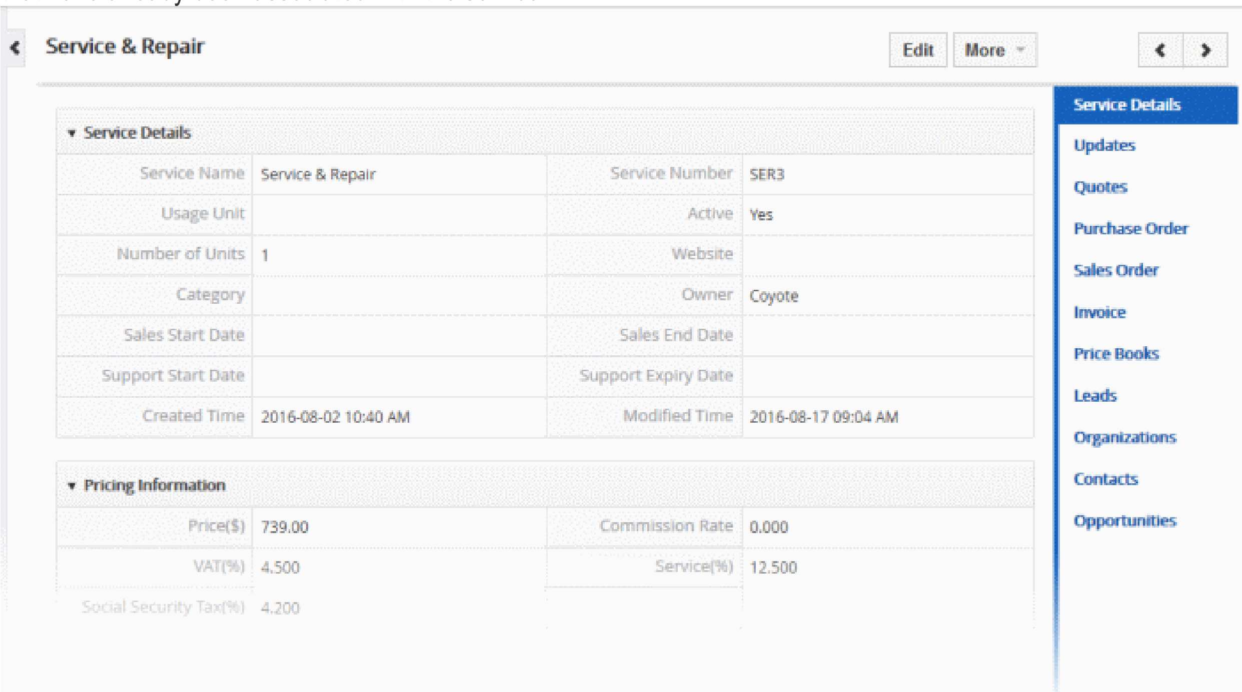
4.3.3. Associate Records from other modules to Service

Associating records from other modules to a service record allows you to track the workflows between different modules and monitor activities mapped to services. For example, associating a price book with a service record educates staff about costing.

To view, add and manage associated records:

- Click 'All' > 'Services'
- Click any service record to open its detail page

The menu on the right shows items that can be associated with the service. Click any of these links to view records that have already been associated with the service:



You can use these links to create records in the other modules which will be linked to the service.

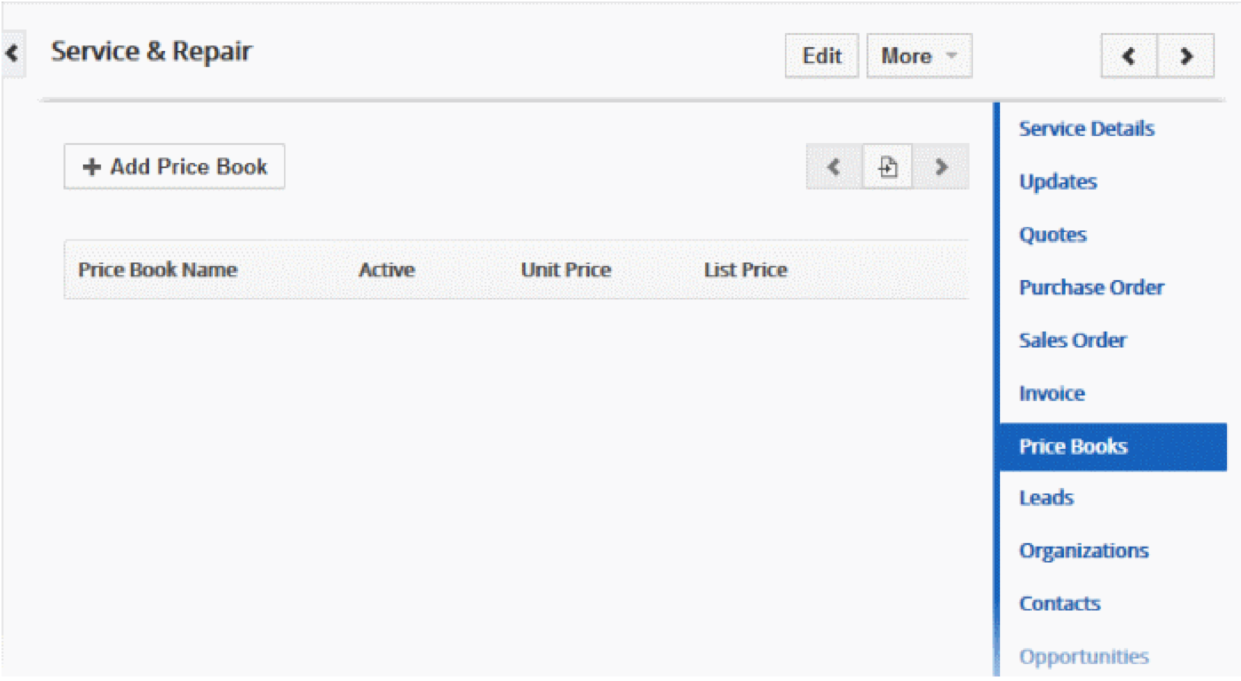
You can associate the following records with a service:

- Quotes - View existing quotes associated with the service. Generate a new quote for the service.
- Purchase Order - Create new purchase order and associate it to the service record
- Sales Order - Create new sales order and associate it to the service record
- Invoice - Create new invoice order and associate it to the service record
- Price Books - Create new purchase order and associate it to the service record
- Leads - View leads already associated with the service. Select new leads to associate with the service.
- Organizations - View organizations already associated with the service. Select new organization to associate with the service.
- Contacts - View contacts already associated with the service. Select new contacts to associate with the service.
- Opportunities -View opportunities already associated with the service. Select new opportunities to associate with the service.

The example below describes how to view and manage the 'Service' records associated with 'Price Books'. A similar process can be followed to associate other module types.

- Click 'All' > 'Service'

- Click on a product in the list then click 'Price Book' on the right



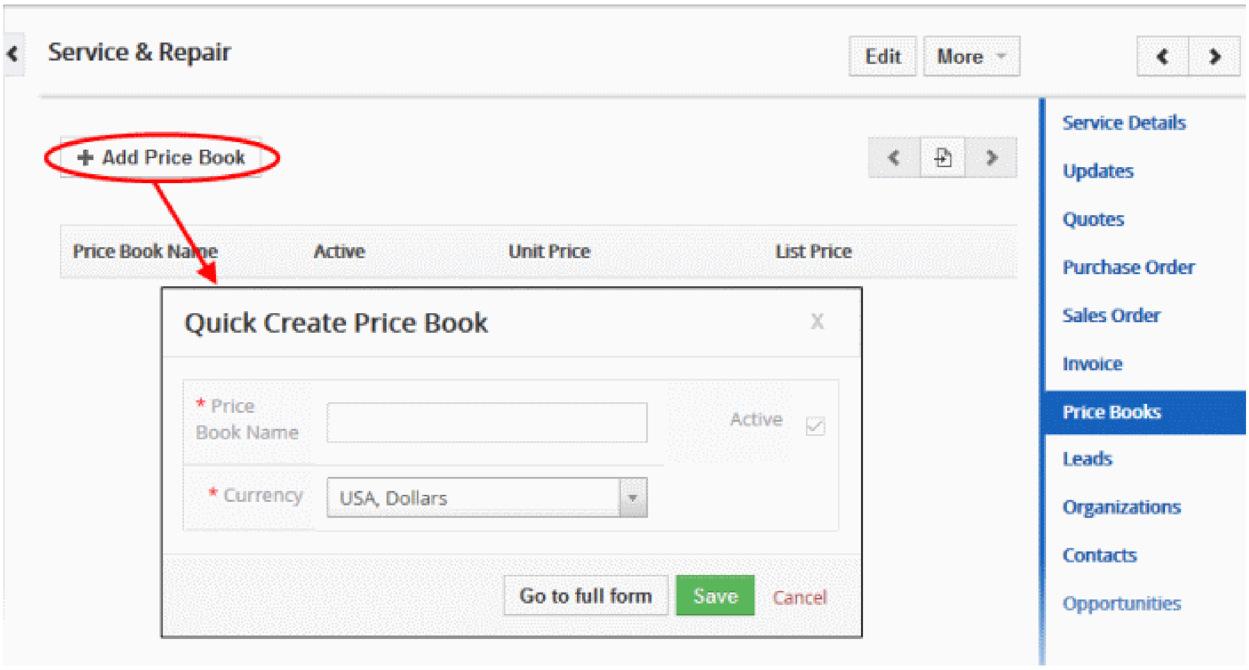
The interface allows you to:

- **Associate new service record with price books**
- **Manage associated service records**

Associate service Records with a Price Book

As mentioned earlier, open a service record then click 'Price Book' on the right.

- Click the 'Add Price Book' button.
- This will display a 'Quick Create Price Book' dialog where you can enter basic price book details:

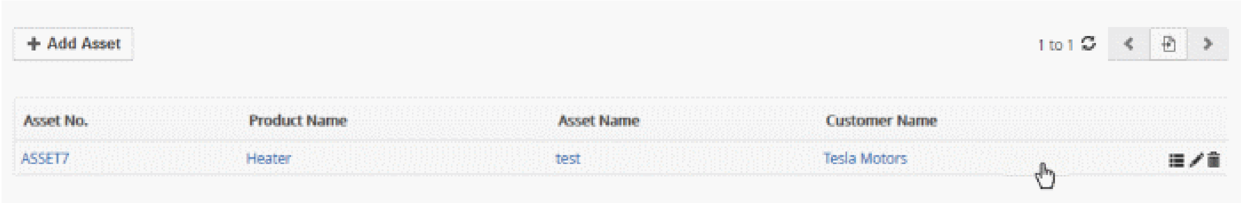


The asset will be added to the list of 'Price Book' associated with the record. Deleting this record will dissociate the asset record from this list.

Manage Associated Service Records

You can manage the associated records from the 'Service' module.

- Mouse over a price book record to view the options at the far right end of the row



- The following options are available:

 - Opens the price book details interface of the respective price book record. See '**Price Books**' for more details.

 - Allows you to edit the price book details. See '**Price Books**' for more details.

 - Removes the association between the price book and the service. Note, this doesn't remove the service itself, which will remain available in the '**Price Books**' module.

In the similar manner you can associate and manage records from other modules that are listed on the right.

4.3.4. Mass management of Services

You can edit / delete / import / export / de-duplicate multiple service records at once. This is useful when you are updating details that are common to a set of service records.

> **Tip**: If you want to update the details of a *single* service record:
> - Open the 'Services List', click the service name then click the 'Edit' button.
> - See '**Managing Services**' for more details.

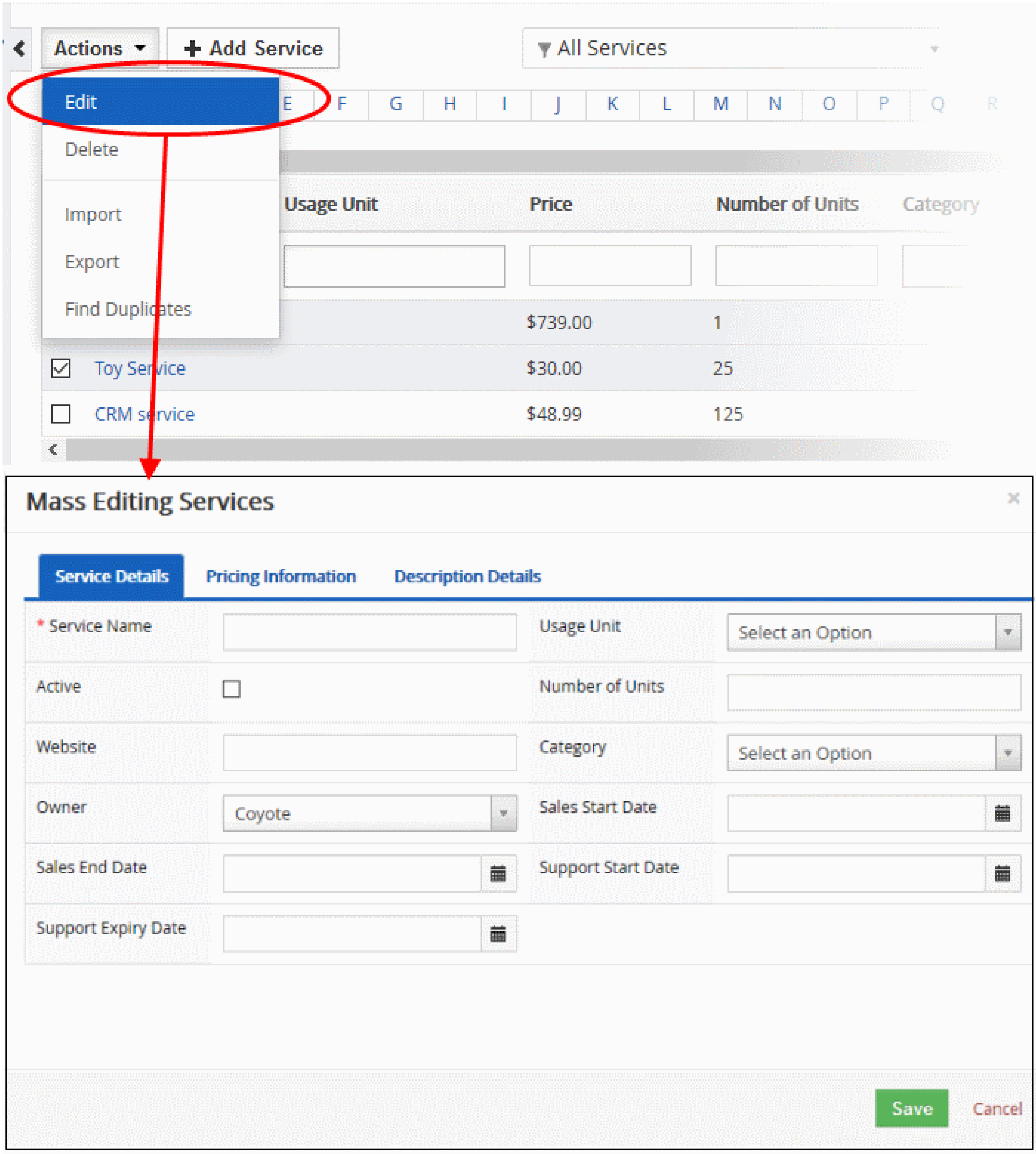
The interface allows you to:

- **Edit mass service records**
- **Delete service records**
- **Import / export service records**
- **Find duplicate service records**

To edit common details of several service records

- Click 'All' > 'Services' to open the 'Services List' interface
- Select the service you want to edit
- Click 'Actions' > 'Edit'

The 'Mass Editing Services' pop-up will appear:



This interface contains four tabs:

- Service Details - Allows you to specify service name, usage units and more. See **this table** for descriptions of the fields in the 'Service Details' tab.
- Pricing Information - Allows you to enter the values for commission rate of the service. See **this table** for details about commission
- Description Details - Allows you to enter a common description for the selected service records.

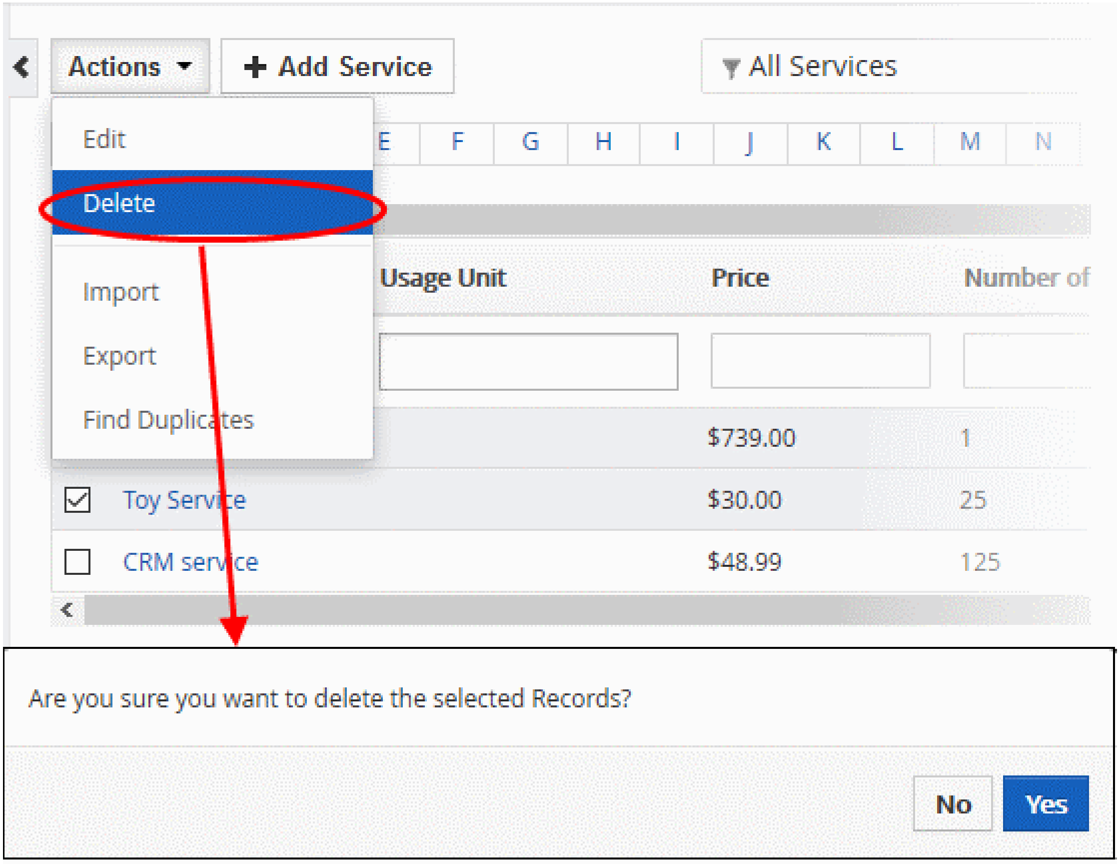
Click 'Save'.

To delete service records

Service records that are no longer required can be removed.

- Click 'All' > 'Services' to open the 'Services List' interface
- Select the services to be deleted

- Click 'Actions' and choose 'Delete' button.



- Click 'Yes' in the confirmation dialog to remove the record(s)

To import / export service records

Export:

- Click 'All' > 'Services'
- (Optional) Manually select the services you wish to export
- Click 'Actions' > 'Export'
- Choose whether to export selected records, all visible records, or all records
- Click 'Export Services'.
- The services will be exported to a .csv file

Import:

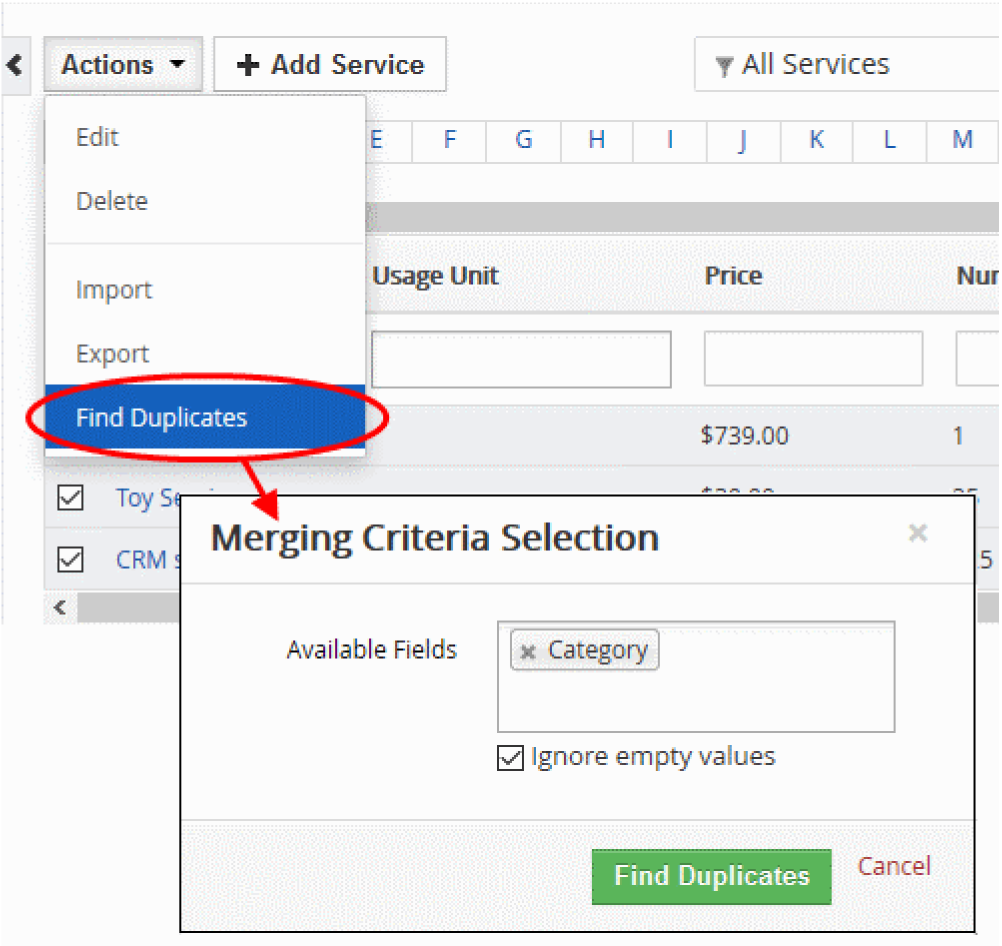
- Click 'All' > 'Services'
- Click 'Actions' > 'Import'
- Browse to the file containing your service records
- Specify the format of your file (.csv or .vcf)
- Click 'Next' to begin the import.

See '**Import and Export Records**' for more information.

To find duplicates

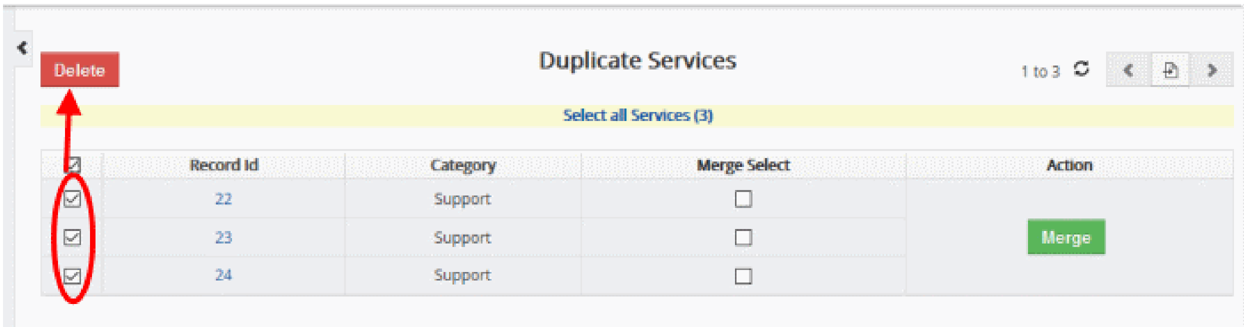
- Click 'All' > 'Services' to open the 'Services' interface

- Click 'Actions' and choose 'Find Duplicates'

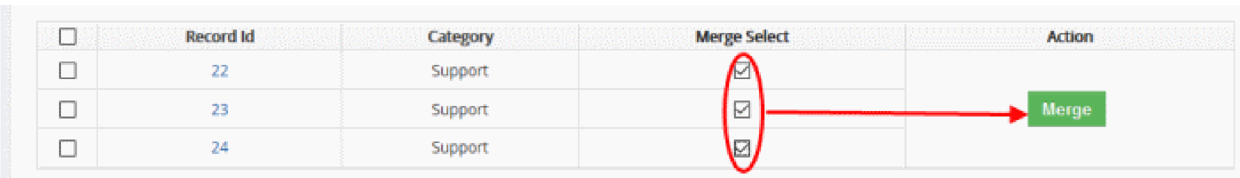


- Click in the 'Available Fields' box and choose the invoice related fields from the drop down. 'Ignore empty values' means the CRM will not consider matching blank fields as an indication of a duplicate.
- Click 'Find Duplicates'

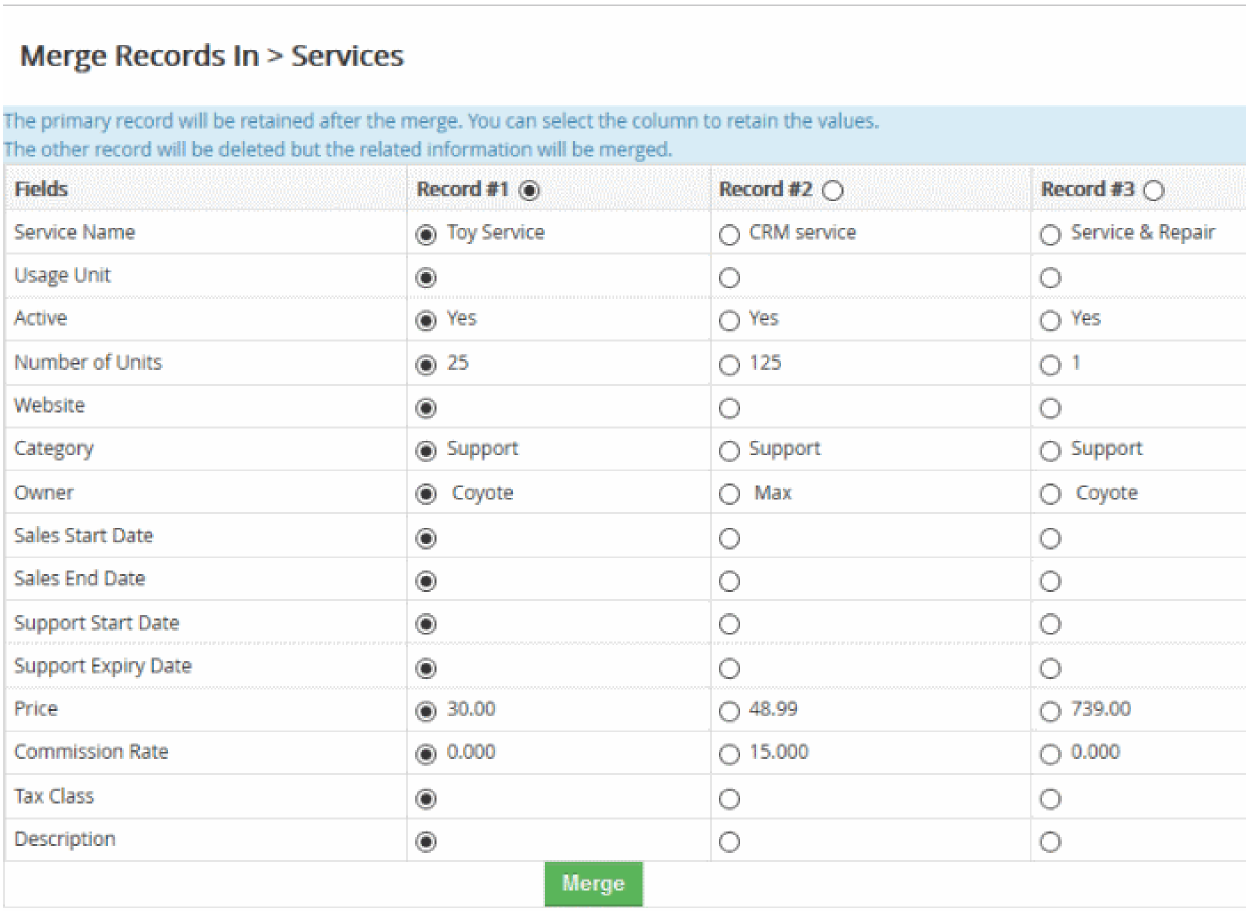
The 'Duplicate Services' page will be displayed.



- To delete a duplicate service record, select it and click the delete button at top left.
- To merge duplicate records, select them from the 'Merge Select' column and click 'Merge'



The 'Merge Records In > Services' dialog will be displayed:


Merge Records In > Services

The primary record will be retained after the merge. You can select the column to retain the values.
The other record will be deleted but the related information will be merged.

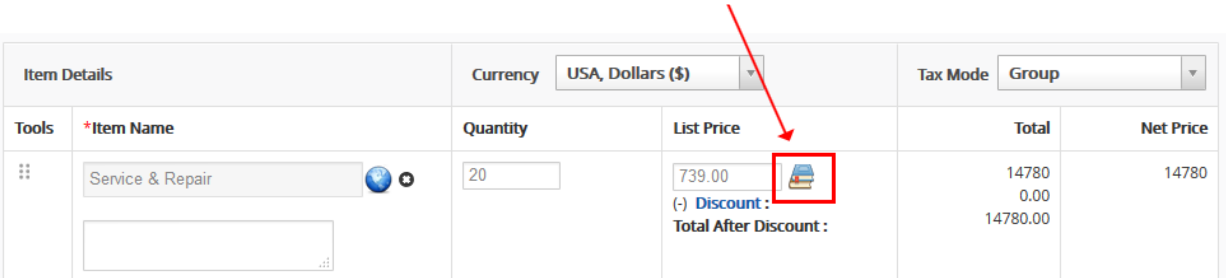
Fields	Record #1	Record #2	Record #3
Service Name	Toy Service	CRM service	Service & Repair
Usage Unit			
Active	Yes	Yes	Yes
Number of Units	25	125	1
Website			
Category	Support	Support	Support
Owner	Coyote	Max	Coyote
Sales Start Date			
Sales End Date			
Support Start Date			
Support Expiry Date			
Price	30.00	48.99	739.00
Commission Rate	0.000	15.000	0.000
Tax Class			
Description			

Merge

- The selected 'Record #' is the primary record. Select other record to change the primary record.
- Select the column values that should be retained in the merged primary record. Please note you can select only one column value for the merged record.
- Click 'Merge'. The records will be merged and displayed in the 'Services List' page as per the selected column values.

4.4. Price Books

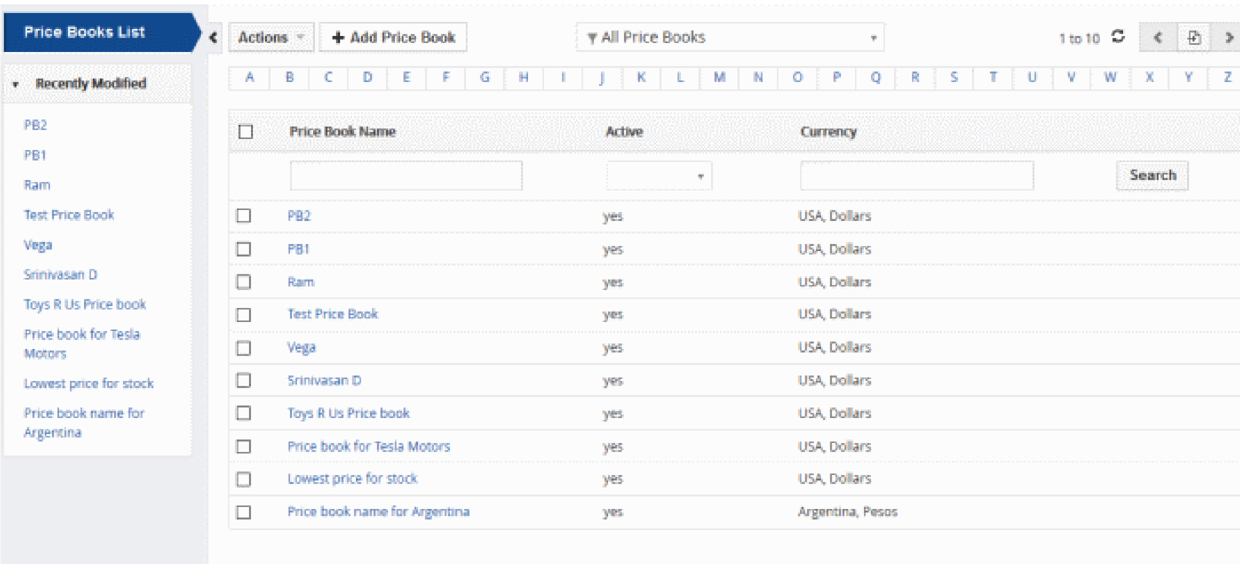
- Price Books let you specify different prices for products/services in a single, easy identifiable record.
- The 'List' price of a product in a price book need not be the same as the 'Unit' price of the product. This gives you the flexibility to charge different pricing schedules to different customer bases.
- You can then assign a price book to a product/service in an invoice, sales order, purchase order or quote. Click the 'Price Book' icon in a quote/invoice/order record to do this:



- You can create as many price books as required by your organization.

Process in brief:

- Click 'All' > 'Price Books' to open the price books interface
- Click '+ Add Price Book'
- Create a name for your price book and specify it's currency. Make the book 'Active' to enable it in the CRM
- Click 'Save'. The new book will be listed in the 'Price Book' interface.
- Click on the new price book to open its details interface
- Click 'Products' on the right then click 'Select Products'
- Select all products you wish to add to the book. For each product you need to specify the 'List Price'
- You can leave this at the default 'Unit Price' or specify a different price. Changing the 'List Price' will not affect the product 'Unit' price.
- Click '+ Add to Price Book' to save your changes.
- All selected products will now be shown in the price book. You can assign the price book to products/services in invoices, sales orders, purchase orders and quotes.
- Repeat the process for 'Services' if you wish to add services to the price book.



The following sections explain on:

- **Add Price Books to a Customer**
- **Manage Price Books**
- **Mass Management of Price Books**

4.4.1. Add Price Books

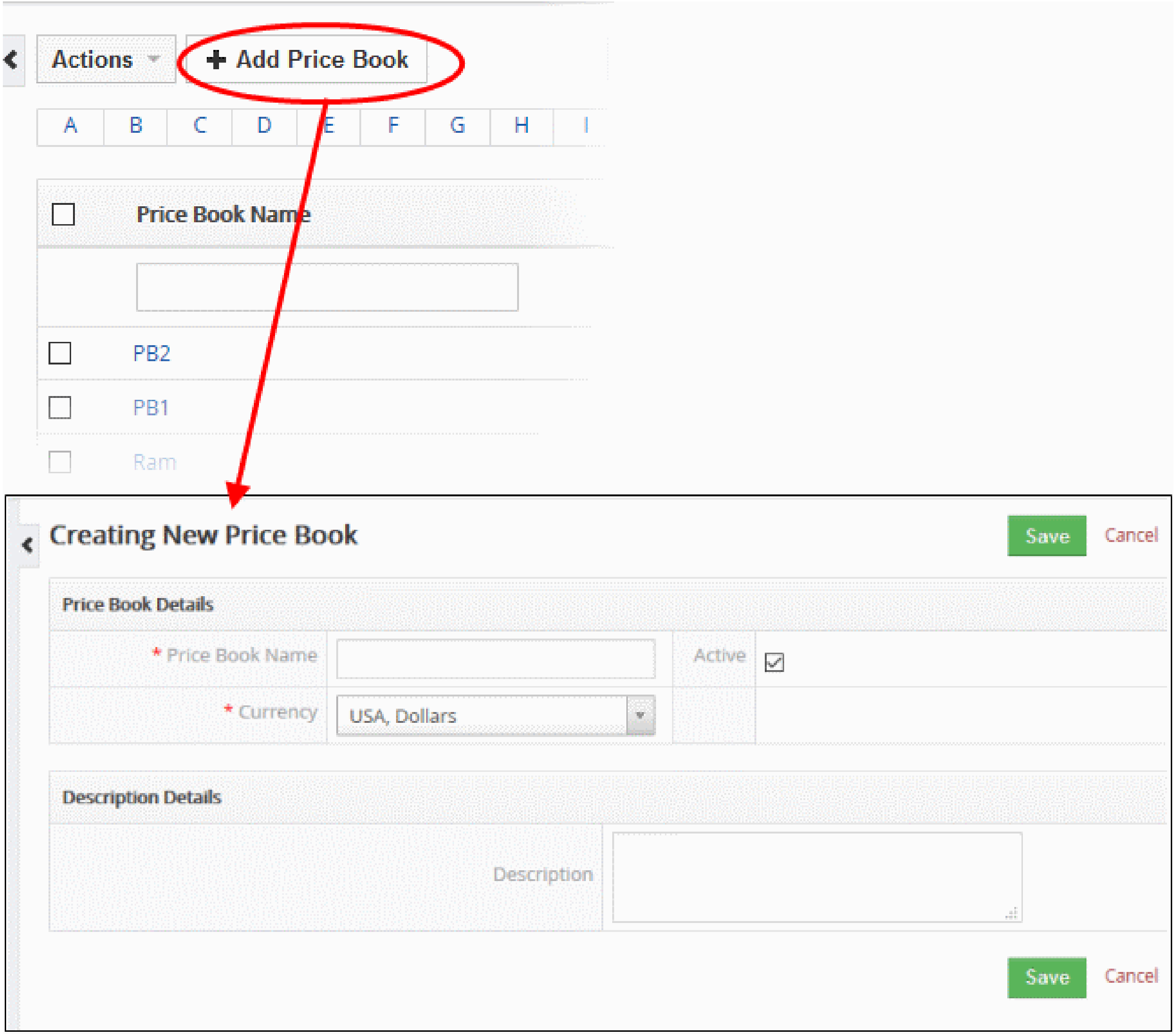
There are five possible ways to create a price book record:

- Click 'All' > 'Price books' > 'Add Price book'. See '**Create a New Price Book Record**' for more information.
- Quick create a record - Add a new price book record with the minimum required information. Other details can be added later as required. See '**Quick Create a Price Book Record**' for details.
- Clone a record - Duplicate an existing price book record to use as the starting point of a new price book. See '**Clone a Price Book Record**' for more information.
- Import price book records - Import a list of price book records from a .csv or .vcf file. See '**Import Price Book Records**' for details.

- Create a price book record from within another module (organizations, contacts etc). See '**Create a Services Record from other Modules**' for more information.

Create a New Price Book Record

- Click 'All' > 'Price Books'.
- Click the 'Add Price Book' button



The 'Create New Price Book' page will open:

Create New Price Book - Form Parameters	
Form Parameter	**Description**
Price Book Details	
Price Book Details	Specify the price book name. This field is mandatory.
Active	Activate or deactivate the price book in the CRM
Currency	Select the currency for the price book. You can add and manage new currencies in 'CRM Settings' > 'Other Settings' > '**Currencies**'.
Description Details	

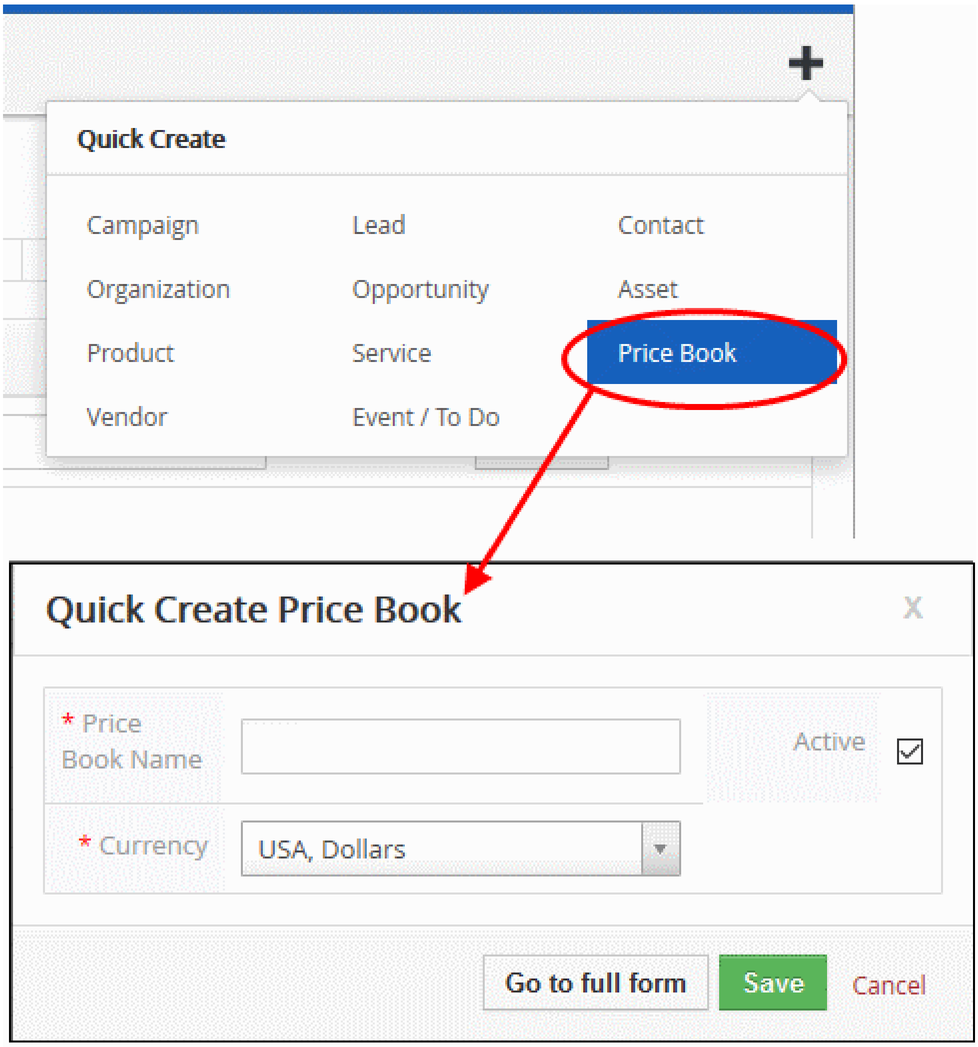
Description	Enter any information and directions you would like to add about the price book.

- Click 'Save'. The price book will be saved and added to the list in the 'Price Book List' interface

Quick Create a New Price book Record

The 'Quick Create' option allows you to create a price book record from any interface. It requires you to enter only basic details.

- Click the '+' button at the top right from any interface of CRM and choose 'Price Book' from the options.
- You can add more details by clicking 'Go to full form'. You can also edit the record at a later date to add more information.



- Complete the basic price book details (price book name, currency, active/inactive)
- If you want to view and enter all details, click 'Go to full form'. Descriptions of the form parameters are available in **this table**.
- Click 'Save'

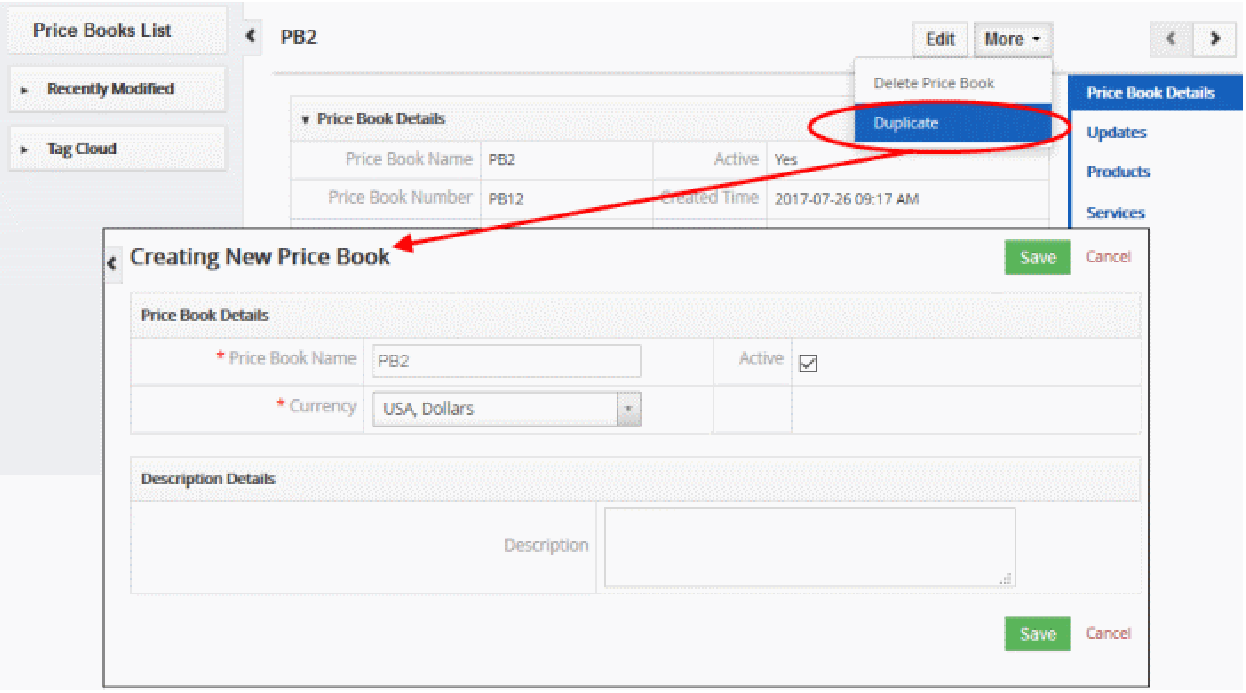
The price book will be added to the list of records in the 'Price Book List' interface.

Clone a Price Book Record

CRM allows you to copy an existing price book record to use as a template for a new record. You can then edit the cloned record as required.

To clone a price book record

- Click 'All' > 'Price Book' to open the 'Price Book List' interface
- Click the name of the price book record you want to clone
- Click 'More' at the top right and choose 'Duplicate'



The 'Create New Price Book' form will open with the details populated from the original record.

- Enter a details for the new price book.
- Edit the details as required. Descriptions of the form parameters are available in the **table above**.
- Click 'Save'.

The price book record will be saved and added to the 'Price Books List' interface.

Import Price Book Records

Another method of creating a price book record is to import from a created list of price book records.

To import price book records

- Click 'All' > 'Price Book' to open the 'Price Books List' interface
- Click 'Actions' > 'Import'

Follow the on-screen instructions to import the desired price book records. See '**Import and Export Records**' for more information.

Create a Price Book record from other Modules

You can also create new price book records from other modules. For example you can create a price book from a service record. See '**Associat Records from other modules to Service**' for more information.

4.4.2. Manage Price Books

- The 'Price Book List' interface displays all price books added to the CRM inventory. Key information is also shown for each price book, including price book name, number, modified time, currency and so on.

- Click on a price book then click 'Edit' to update the price book as required. The editing interface also allows you to view previous updates to the price book.
- You can associate price books with invoices, sales order,s purchase orders and quotes.

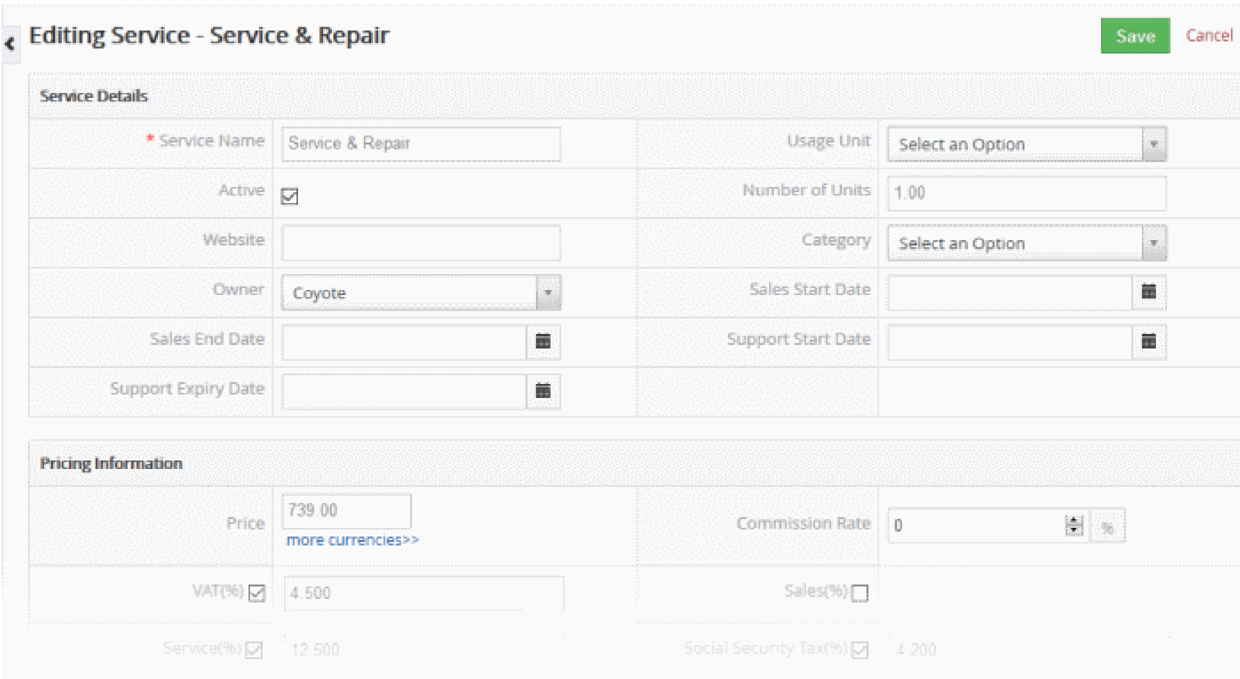
To view price book details:

- Click 'All' > 'Price Book' to open the 'Price Book List' interface
- Click on a price book to open its details page.
- Use the links on the right to view Price Book updates and other CRM items that are associated with the Price Book.

To edit a price book:

- Click 'All' > 'Price Book' to open the 'Price Book List' interface
- Click on a price book's name and then the 'Edit' button at the top right of the 'Price Book Details' interface.

  OR
- Click 'All' > 'Price Book' to open the 'Price Book List' interface
- Place your mouse cursor over the price book name to reveal the action buttons on the right of the row.
- Click the 'pencil' icon to open the price book edit interface:



- See **this table** for descriptions of the fields in the 'Price Book Details' interface

The links on the right of a price book detail page let you view and manage the following items:

- Price Book Details - Shows complete price book details
- Updates - Shows all modifications done to the price book record
- Modules - View product and service records that are linked to the price book. You can also link new records to the price book using these links. See '**Associate Records from other modules to Service**' for more information.
- Click 'Edit' to modify price book information:
- 'More' menu:
  - 'Delete Price Book' to delete price book record

- 'Duplicate' to clone the record to use it as the basis for a new price book. See '**Clone a Price Book Record**' to know more.

4.4.3. Mass Management of Price Books

You can edit / delete / import / export / de-duplicate multiple service records at once. This is useful when you are updating details that are common to a set of price book records.

Tip: If you want to update the details of a *single* price book record:

- Open the 'Price Books List', click the price book name then click the 'Edit' button.
- See '**Manage Price Books**' for more details.

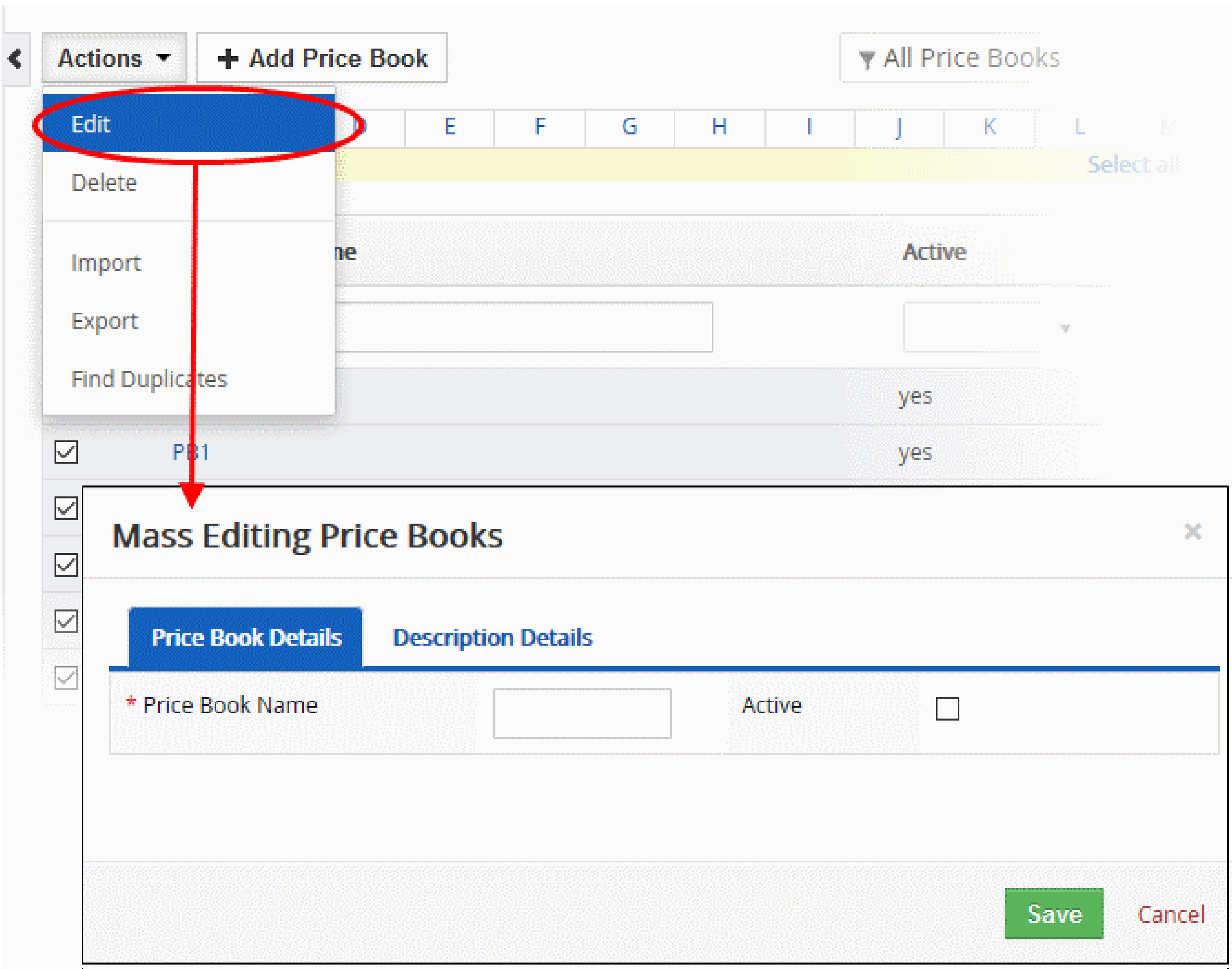
The interface allows you to:

- **Edit mass price book records**
- **Delete price book records**
- **Import / export price book records**
- **Find duplicate price book records**

To edit common details of several price book records

- Click 'All' > 'Price Book' to open the 'Price Book List' interface
- Select the price book you want to edit
- Click 'Actions' > 'Edit'

The 'Mass Editing Price Books' pop-up will appear:



This interface contains two tabs:

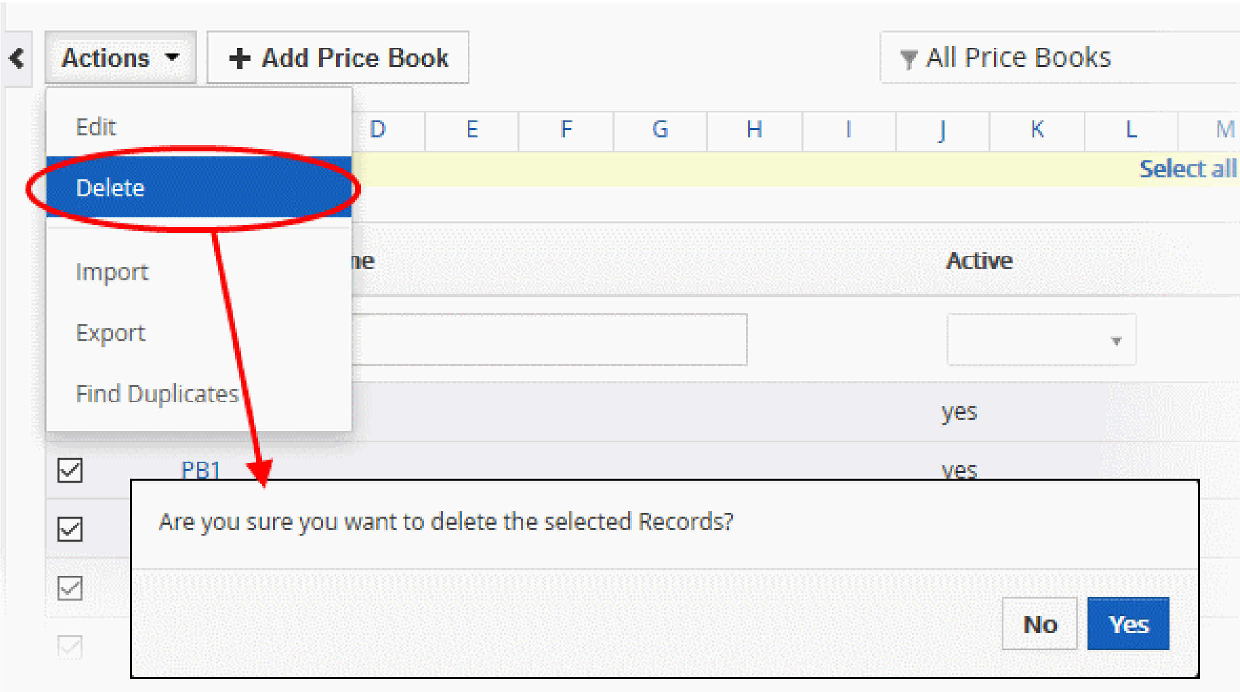
- Price Book Details - Allows you to specify price book name, and if the price books are active or not. See **this table** for descriptions of the fields in the 'Price Book Details' tab.
- Description Details - Allows you to enter a common description for the selected price book records.

Click 'Save'.

To delete price book records

Price Book records that are no longer required can be removed.

- Click 'All' > 'Price Book' to open the 'Price Book List' interface
- Select the price books to be deleted
- Click 'Actions' and choose 'Delete' button.



- Click 'Yes' in the confirmation dialog to remove the record(s)

To import / export price book records

Export:

- Click 'All' > 'Price Book'
- (Optional) Manually select the price book you wish to export
- Click 'Actions' > 'Export'
- Choose whether to export selected records, all visible records, or all records
- Click 'Export Services'.
- The price book will be exported to a .csv file

Import:

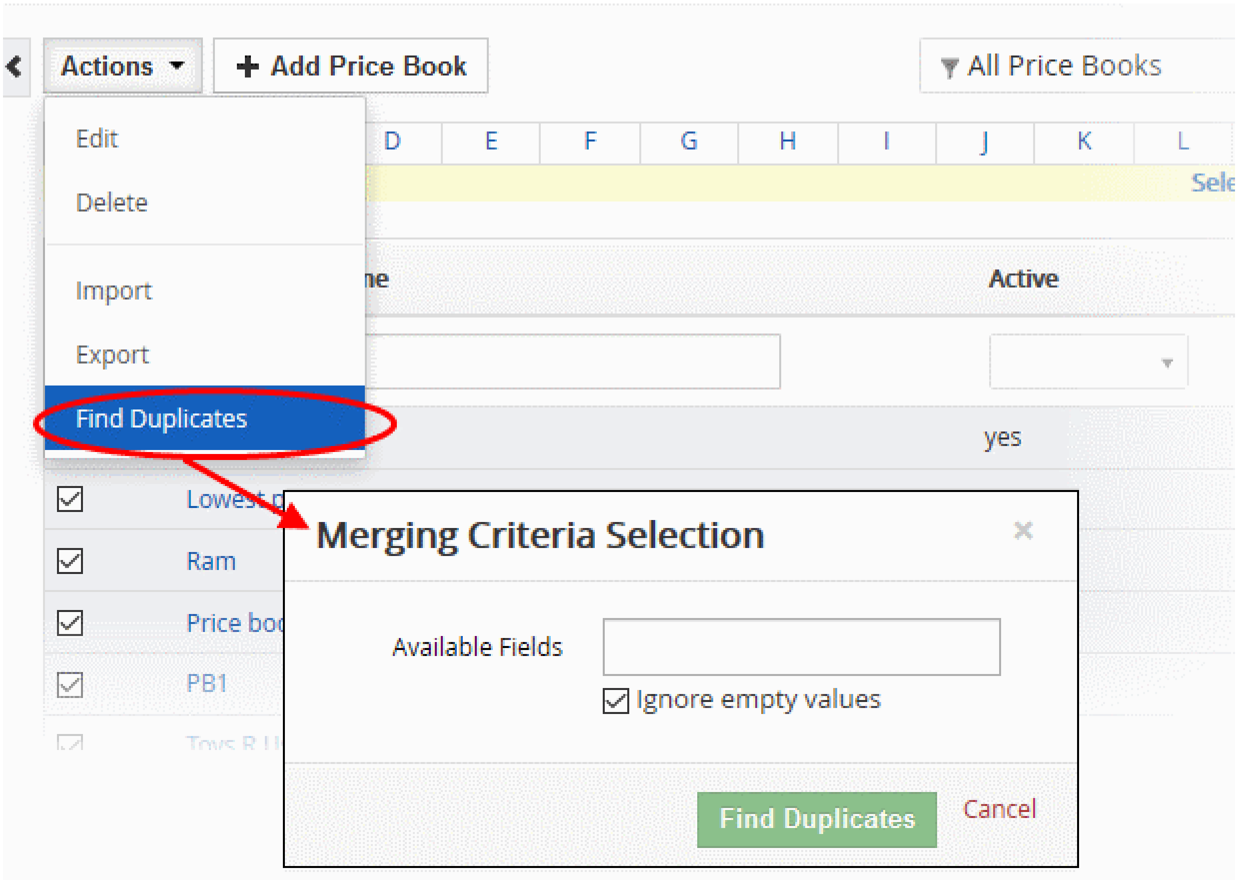
- Click 'All' > 'Services'
- Click 'Actions' > 'Import'
- Browse to the file containing your price book records

- Specify the format of your file (.csv or .vcf)
- Click 'Next' to begin the import.

See '**Import and Export records**' for more information.

To find duplicates

- Click 'All' > 'Price Books' to open the 'Price Books' interface
- Click 'Actions' and choose 'Find Duplicates'

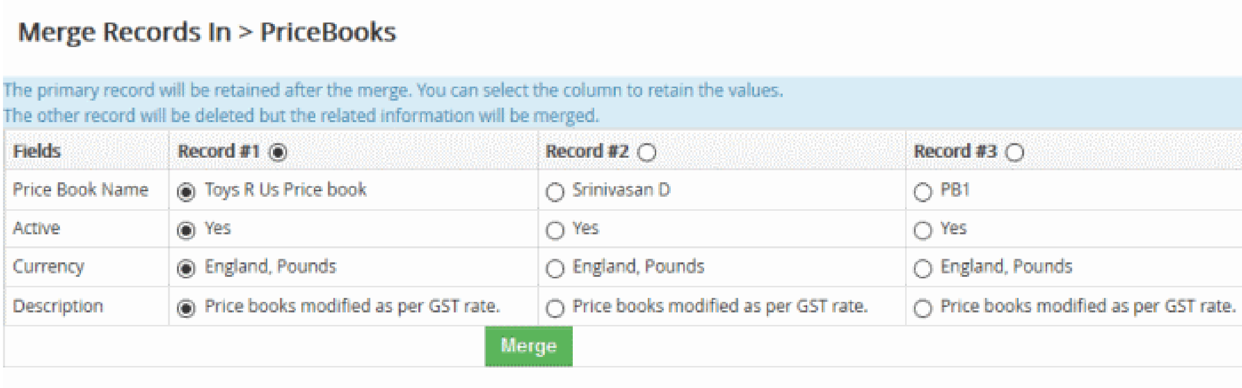


- Click in the 'Available Fields' box and choose the price book based fields from the drop down. 'Ignore empty values' means the CRM will not consider matching blank fields as an indication of a duplicate.
- Click 'Find Duplicates'

The 'Duplicate Price Book' page will be displayed.

- To delete a duplicate price book record, select it and click the delete button at top left.
- To merge duplicate records, select them from the 'Merge Select' column and click 'Merge'

The 'Merge Records In > Price Book' dialog will be displayed:



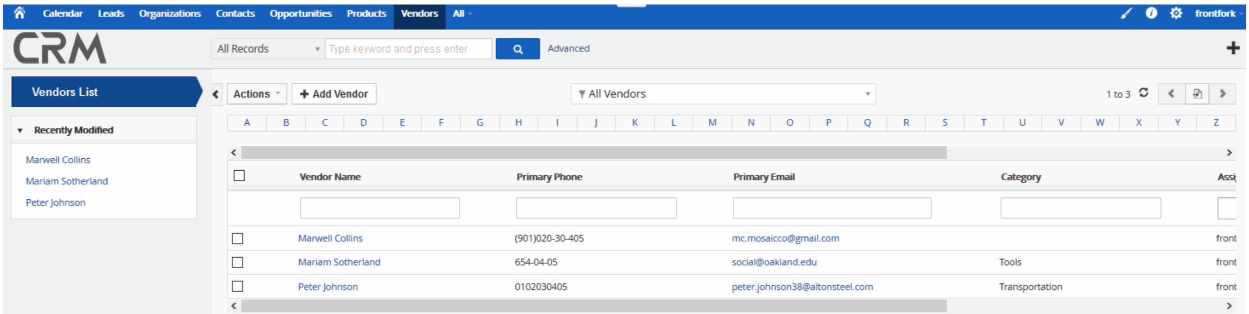
- The selected 'Record #' is the primary record. Select other record to change the primary record.
- Select the column values that should be retained in the merged primary record. Please note you can select

only one column value for the merged record.

- Click 'Merge'. The records will be merged and displayed in the 'Price Book List' page as per the selected column values.

4.5. Vendors

- A vendor is an individual or organization that supplies products or services to your company.
- Click 'All' > 'Vendors' to open the vendor management interface
- Click 'All' > 'Vendors' > ' + Add Vendor ' to create a new vendor record
- You can associate a vendor with a 'Product', 'Purchase Order' or 'Contact'
- You can view and send emails directly to a vendor from the vendor details page
- You can import or export vendor lists in .csv or .vcf format



The following sections explain more about each area:

- **Add a vendor**
- **Manage Vendors**
- **Associate Records from other Modules to Vendors**
- **Mass Management of Vendors**

4.5.1. Add a Vendor

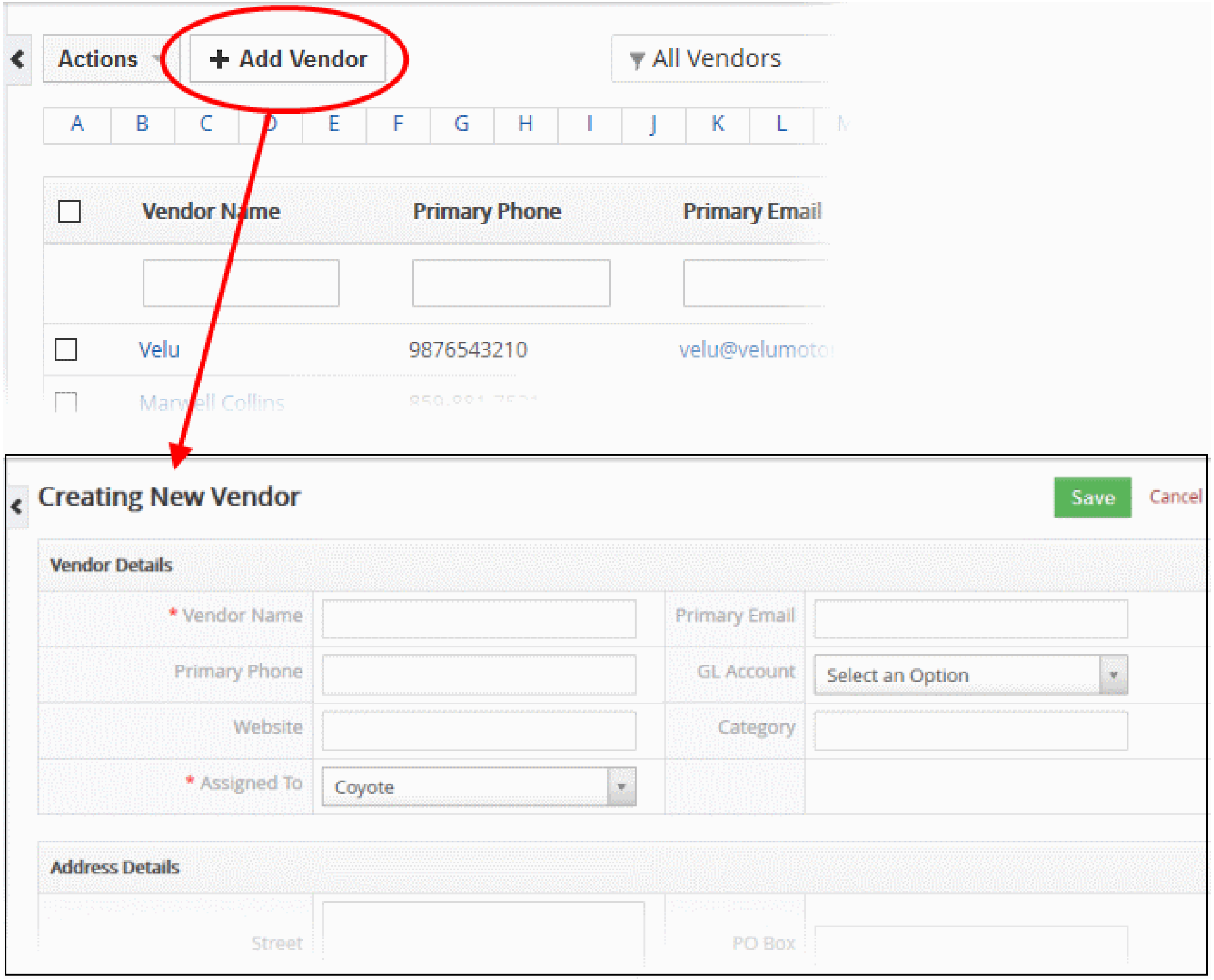
There are four possible ways to create a vendor record:

- Click 'All' > 'Vendors' > 'Add Vendor'.
  This will open the full 'New Vendor' form. See '**Create a New Vendor Record**' for more information.
- Quick create a record - Click the '+' button > Click 'Vendor'
  Create a vendor by completing only basic details. Other details can be added later as required. See '**Quick Create a Vendor Record**' for details.
- Clone a record - Duplicate an existing vendor record to use as template for a new vendor record. See '**Clone a Vendor Record**' for more information.
- Import vendor records - Import a list of vendors records from .csv or .vcf file. See '**Import Vendor Records**' for details.

Create a New Vendor Record

- Click 'All' > 'Vendors'
- Click the 'Add Vendor' button

The 'Create New Vendor' page will open:



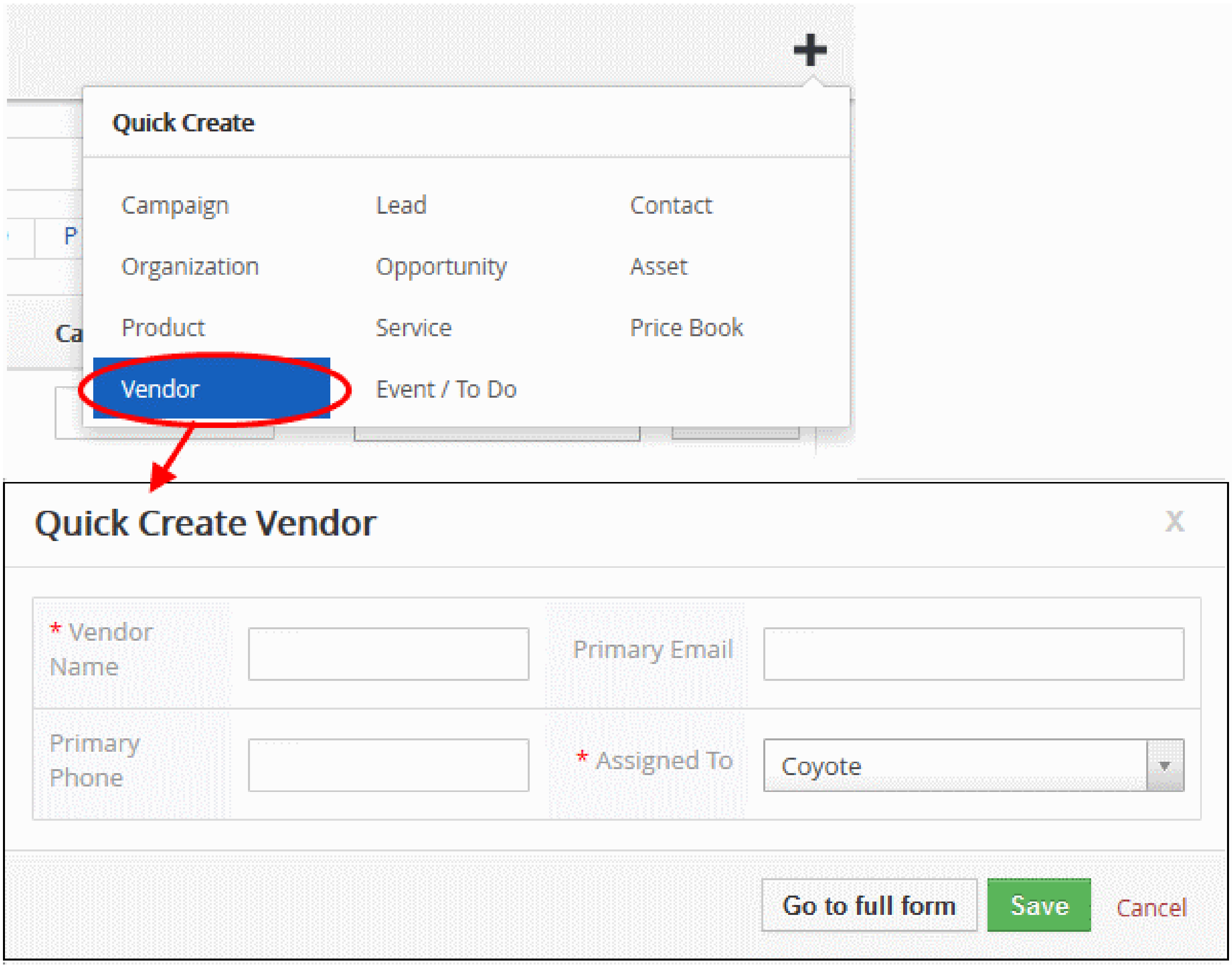
Create New Vendor - Form Parameters	
Form Parameter	**Description**
Vendor Details	
Vendor Name	Name of the supplier. This field is mandatory.
Primary Email	Contact email address of the supplier.
Primary Phone	Main contact phone number of the supplier.
GL Account	General Ledger account. Select the ledger type to which the supplier belongs. To add or remove an item from the list, contact your administrator.
Website	Supplier's website
Created Time	Date and time that the vendor record was created.
Category	The industry or service sector of the supplier.
Modified Time	Date and time of the last update to the vendor record.
Assigned To	Staff member responsible for the supplier.
Description Details	
Description	Add any information and directions you would like to add about the vendor.

- Click 'Save'. The vendor will be saved and added to the list in the 'Vendor List' interface

Quick Create a New Vendor Record

The 'Quick Create' option allows you to create a vendor record from any interface. It requires you to enter only basic details.

- Click the '+' button at the top right from any interface of CRM and choose 'Vendor' from the options.
- Complete the basic vendor details (vendor name, primary email etc)
- If you want to view and enter all details, click 'Go to full form'. Descriptions of the form parameters are available in **this table**.
- Click 'Save'



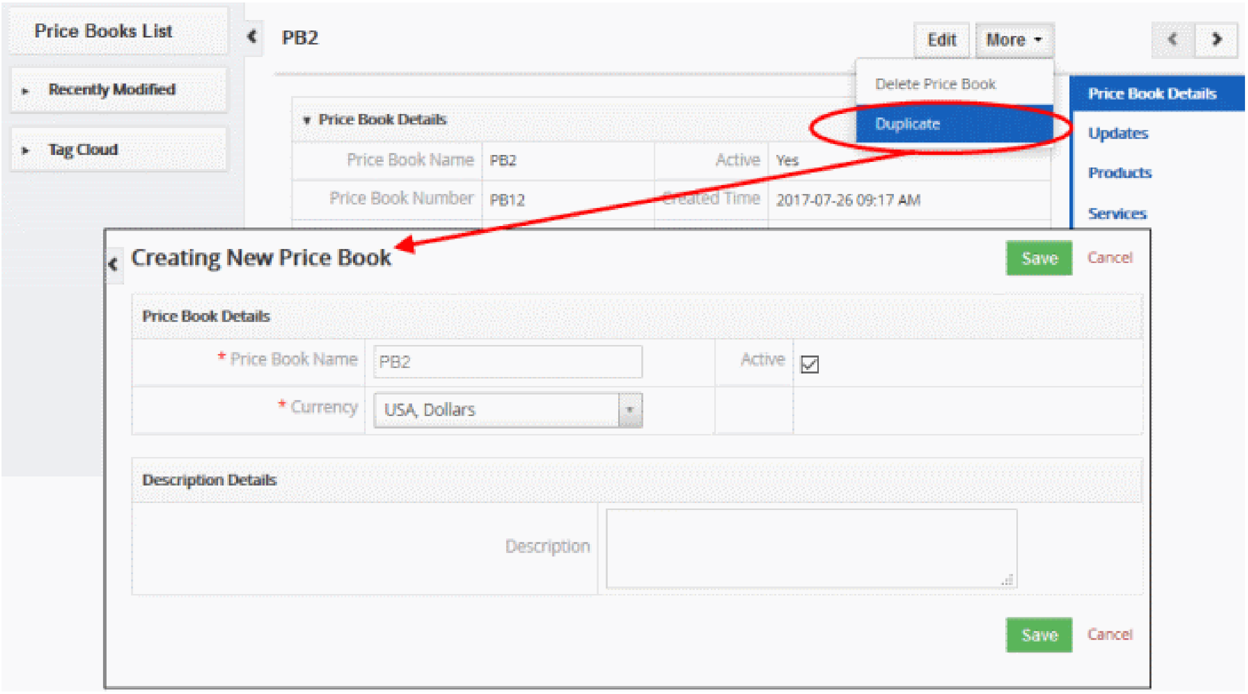
The vendor will be added to the list of records in the 'Vendors List' interface.

Clone a Vendor Record

CRM allows you to copy an existing vendor record to use as a template for a new record. You can then edit the cloned record as required.

To clone a vendor record

- Click 'All' > 'Vendor' to open the 'Vendor List' interface
- Click the name of the vendor record you want to clone
- Click 'More' at the top-right and choose 'Duplicate'



The 'Create New Vendor' form will open with the details populated from the original record.

- Edit the details as required to create your new vendor. Descriptions of the form parameters are available in the **table above**.
- Click 'Save'.

The vendor record will be saved and added to the 'Vendor List' interface.

Import Vendor Records

Another method of creating vendor records is to import from a .csv or .vcf file. Please make sure all mandatory fields required to create a new record are present in your import file.

To import vendor records

- Click 'All' > 'Vendor' to open the 'Vendor List' interface
- Click 'Actions' > 'Import'

Follow the on-screen instructions to import the desired vendor records. See '**Import and Export Records**' for more information.

4.5.2. Manage Vendors

- The 'Vendor List' interface displays all vendor added to the CRM inventory. Key information is also shown for each vendor, including vendor name, contact details, industry category and assigned staff member.
- Click on a vendor then click 'Edit' to update the vendor as required. The editing interface also allows you to view previous updates to the vendor.
- You can associate a vendor with products, purchase orders and contacts. You can also send emails to the vendor direct from this interface.

To view vendor details:

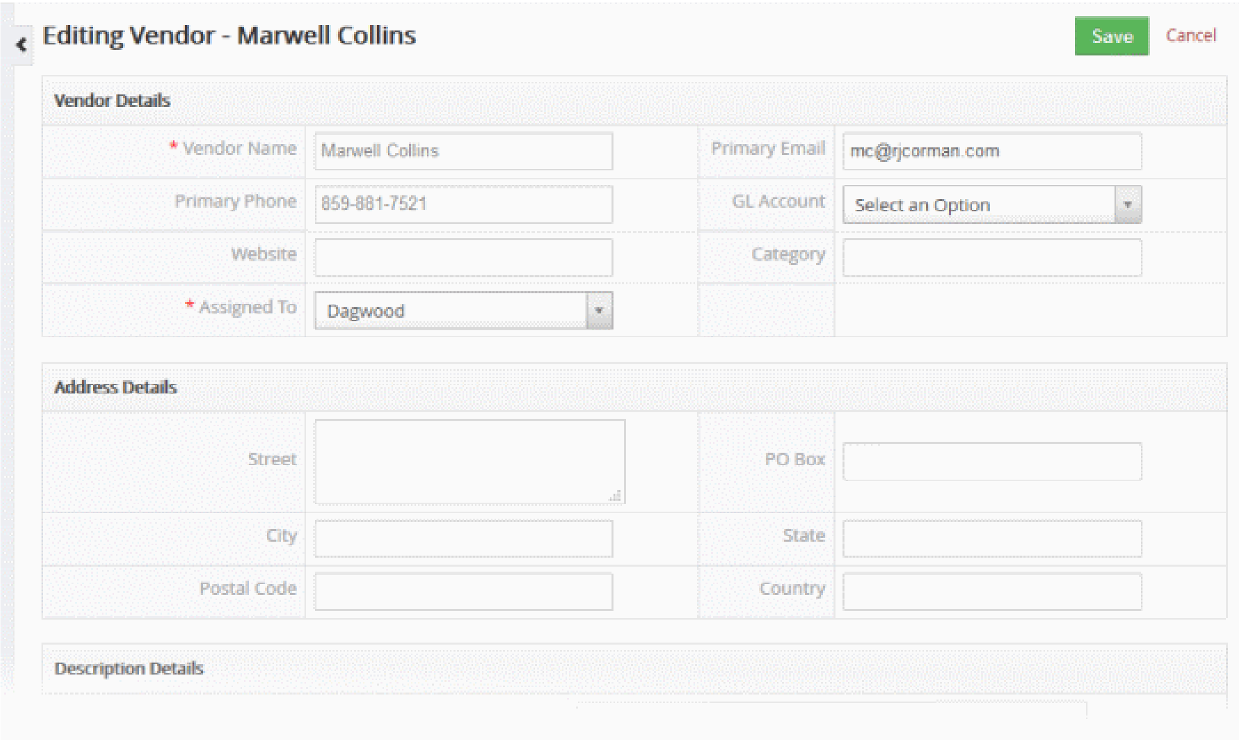
- Click 'All' > 'vendor' to open the 'Vendor List' interface
- Click on a vendor to open its details page.

- Use the links on the right to view vendor updates and other CRM items that are associated with the Vendor.

To edit a vendor:

- Click 'All' > 'Vendor' to open the 'Vendor List' interface
- Click on a vendor's name and then the 'Edit' button at the top right of the 'Vendor Details' interface.

  OR
- Click 'All' > 'Vendor' to open the 'Vendor List' interface
- Place your mouse cursor over the vendor name to reveal the action buttons on the right of the row.
- Click the 'pencil' icon to open the vendor edit interface:



- See **this table** for descriptions of the fields in the 'Vendor Details' interface

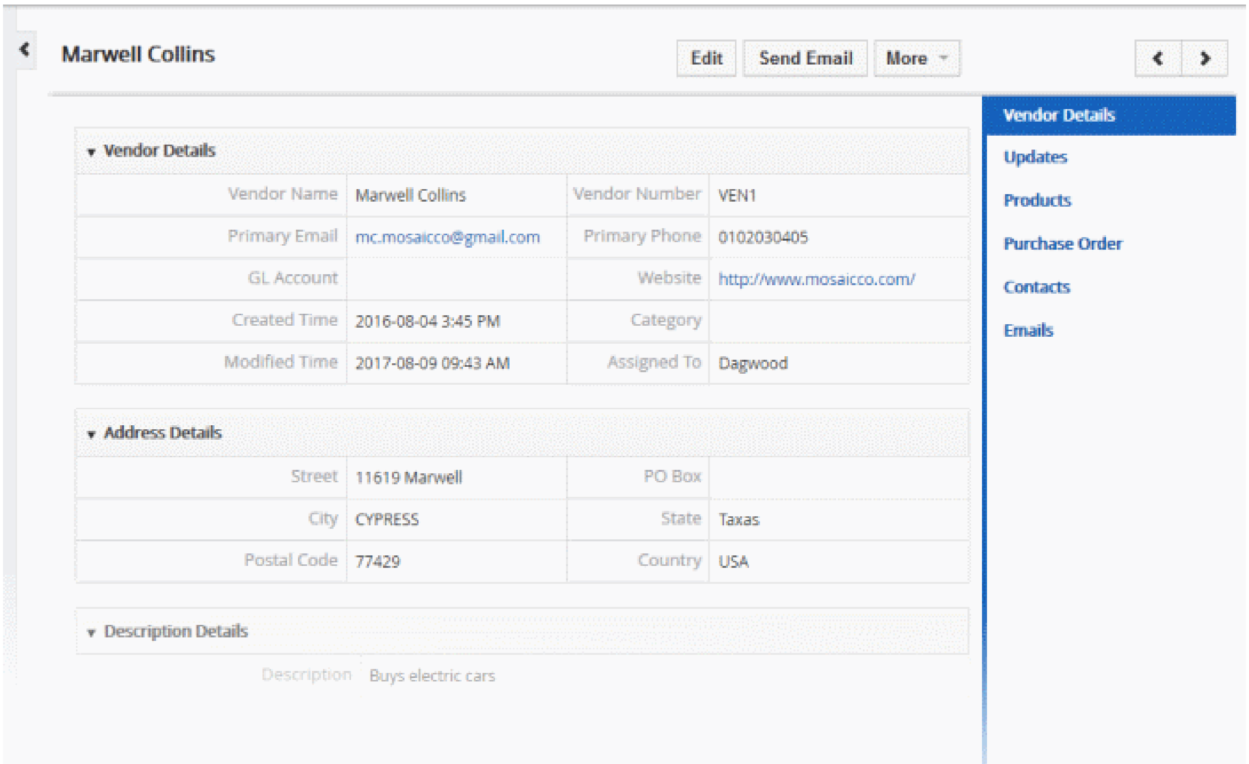
The links on the right of a vendor detail page let you view and manage the following items:

- Vendor Details - Shows complete vendor details
- Updates - Shows all modifications done to the vendor record
- Modules - View product, contact,purchase order and email records that are linked to the vendor. You can also link new records to the vendor using these links. See '**Associate Records from other Modules to Vendors**' for more information.
- Click 'Edit' to modify vendor information:
- 'More' menu:
  - 'Delete Vendor' to delete service record
  - 'Duplicate' to clone the record to use it as the basis for a new vendor record. See '**Clone a Vendor Record**' to know more.

4.5.3. Associate Records from other Modules to Vendors

After creating a vendor, you can associate it with a CRM product, purchase order or contact.

- Click 'All' > 'Vendors'
- Click the name of a vendor in the list
- Use the links in the right-hand menu to associate the vendor with a product, purchase order or contact:



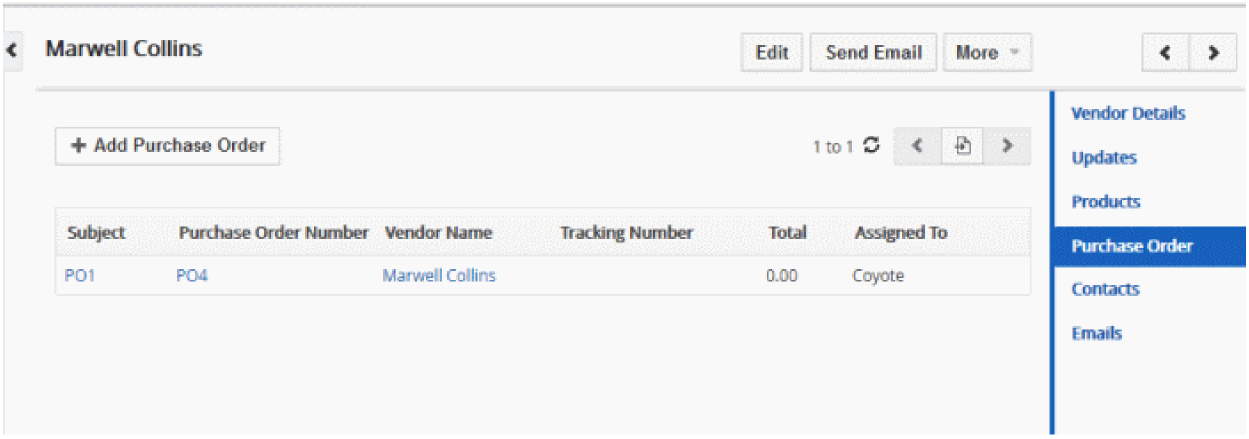
You can use these links to create records in the other modules which will be linked to the vendors.

You can associate the following records with a service:

- Products - View and manage existing products associated with the vendor. Associate new products with the vendor.
- Purchase Order - View and manage existing purchase order records. Associate new purchase orders with the vendor. Email a purchase order to the vendor in pdf format.
- Contacts - View and manage existing contacts associated with the vendor. Associate a new contact with the vendor.
- Emails - Send new emails to the vendor's primary contact. View and manage previous emails sent to the vendor.

The following example explains how to associate and manage vendor purchase orders. A similar process can be followed for associating products and contacts with a vendor.

- Click 'All' > 'Vendors'
- Click on a vendor name to open its details page
- Click the 'Purchase Order' link on the right

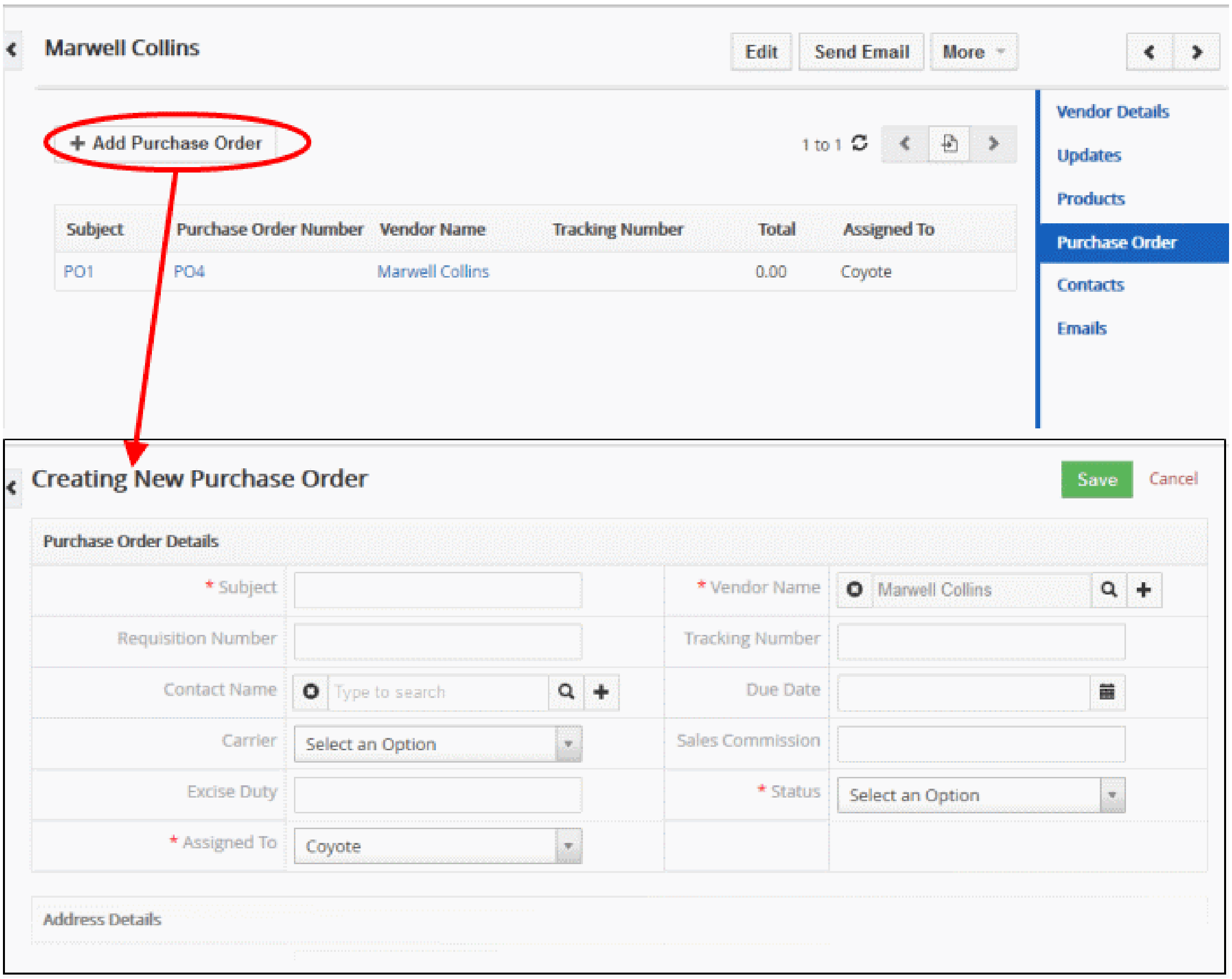


The interface allows you to:

- **Associate a new purchase order with a vendor**
- **Manage associated purchase order records**

Associate a new purchase order with a vendor

- Open a vendor record then click 'Purchase Order' on the right.
- Click the 'Add Purchase Order' button.
- Complete the 'Create New Purchase Order' form with as many details as are at your disposal:



- This will create the purchase order and associate it with the vendor record.

- Open the purchase order and click 'More' to:
  - Email the purchase order as a pdf to the vendor primary contact
  - Export the purchase order to pdf
  - Delete or duplicate the purchase order

Manage Associated Purchase Order Records

To manage associated records:

- Click 'All' > 'Vendors' >
- Click on a vendor in the list then click 'Purchase Orders' on the right
- Place your mouse over any purchase order row
- Three record management icons will appear on the right on the row:

	View	View full details of the purchase order. See '**Purchase Orders**' if you need help with any of the fields on this page.
	Edit	Make modifications or additions to the purchase order. Scroll to the bottom if you wish to change products or product pricing. See '**Purchase Orders**' if you need help with any of the fields on this page.
	Deleted	Deletes the purchase order. Note, this removes the purchase order record created in the purchase order module as well.

You can associate and manage products and contacts in a similar manner.

4.5.4. Mass Management of Vendors

You can perform the same action on multiple vendors records at once. This is useful when you are updating details that are common to a set of vendor records.

To manage multiple records:

- Click 'All' > 'Vendors' to open the list of vendors
- Select the vendors you want to work on using the check-boxes to the left
- Click the 'Actions' button
- Select the action you wish to perform.
- Mass management actions include 'edit', 'delete', 'send email', 'de-duplicate', 'import' and 'export'

Tip: If you want to update the details of a *sin*gle vendor record:

- Open the 'Vendors List', click a vendor name then click the 'Edit' button.
- See '**Manage Vendors**' for more details.

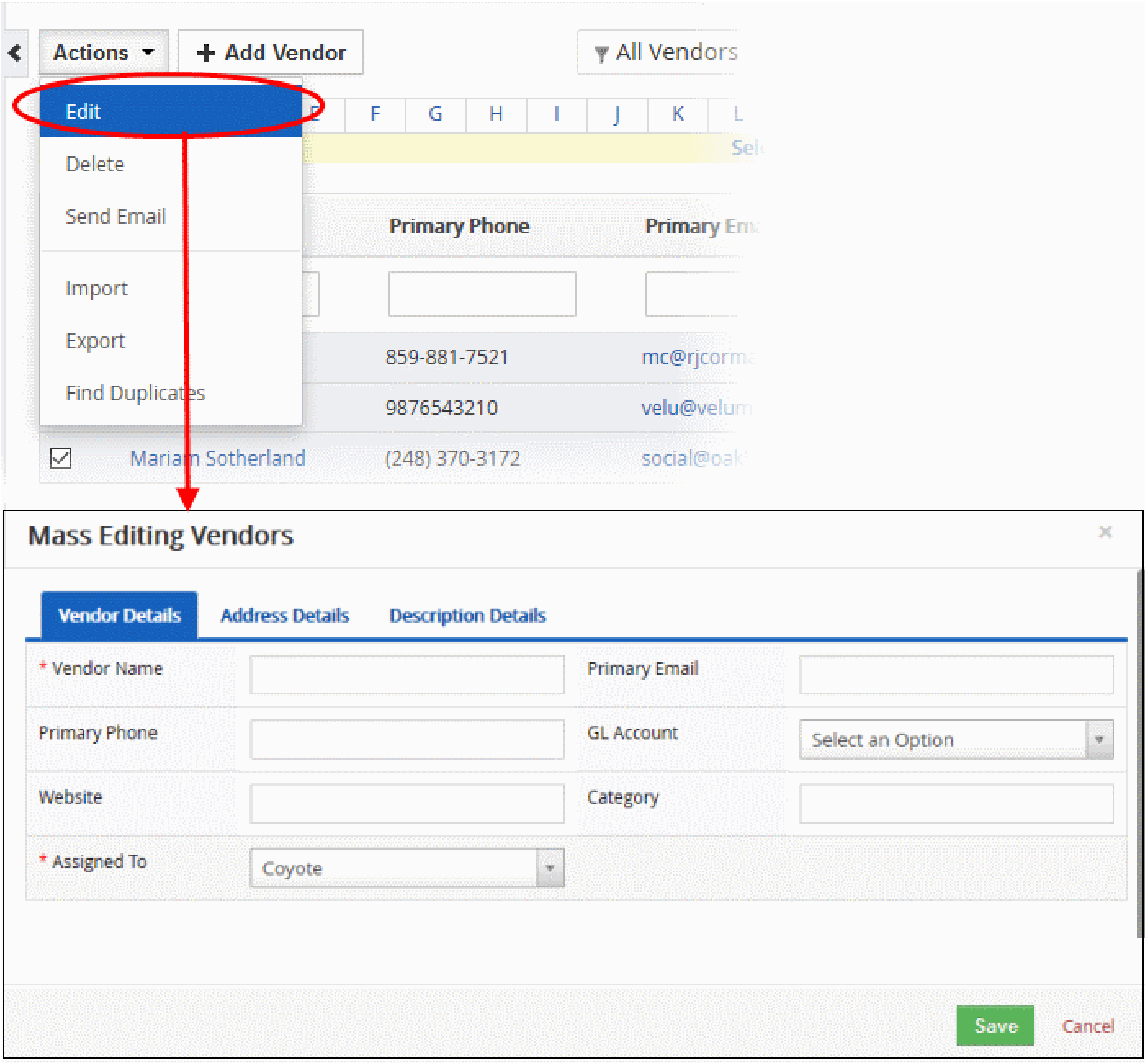
The interface allows you to:

- **Edit mass vendor records**
- **Delete vendor records**
- **Send email**
- **Import / export vendor records**
- **Find duplicate vendor records**

To edit common details of several vendor records

- Click 'All' > 'Vendors' to open the 'Vendors List' interface
- Select the vendors you want to edit
- Click 'Actions' > 'Edit'

The 'Mass Editing Vendor' pop-up will appear:



This interface contains three tabs:

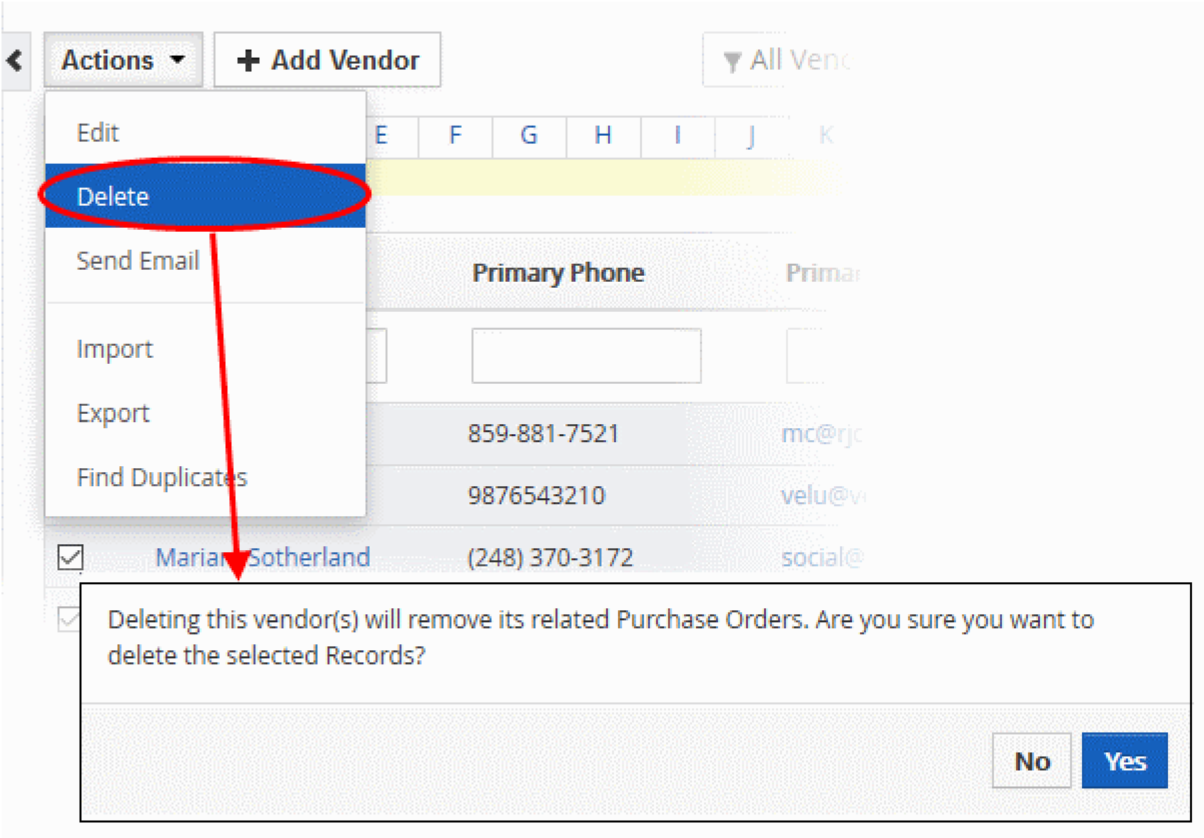
- Vendor Details - Specify common details for vendor name, email, website, assignee and more.
- Address details - Specify a common address for the vendors.
- Description Details - Specify a common description for the vendors

Click 'Save'.

To delete vendor records

Vendor records that are no longer required can be removed.

- Click 'All' > 'Vendor' to open the 'Vendor List' interface
- Select the vendors you want to delete
- Click 'Actions' > 'Delete'



- Click 'Yes' in the confirmation dialog to remove the record(s)

Send Email

You can send mails to multiple vendors at once. All vendors should have a primary email contact.

- Click 'All' > 'Vendors' to open the 'Vendor List' interface
- Select the vendors you want to email
- Click 'Actions' > 'Send Email'
- This will open the email editor with the email addresses of all selected vendors in the 'To' field
- Compose your email OR click 'Select Email Template'
- Click 'Send' or 'Save as draft' as required.

To import / export vendor records

Export:

- Click 'All' > 'Vendor'
- (Optional) Manually select the vendors you wish to export
- Click 'Actions' > 'Export'
- Choose whether to export selected records, all visible records, or all records
- Click 'Export Vendors'.
- The vendors will be exported to a .csv file

Import:

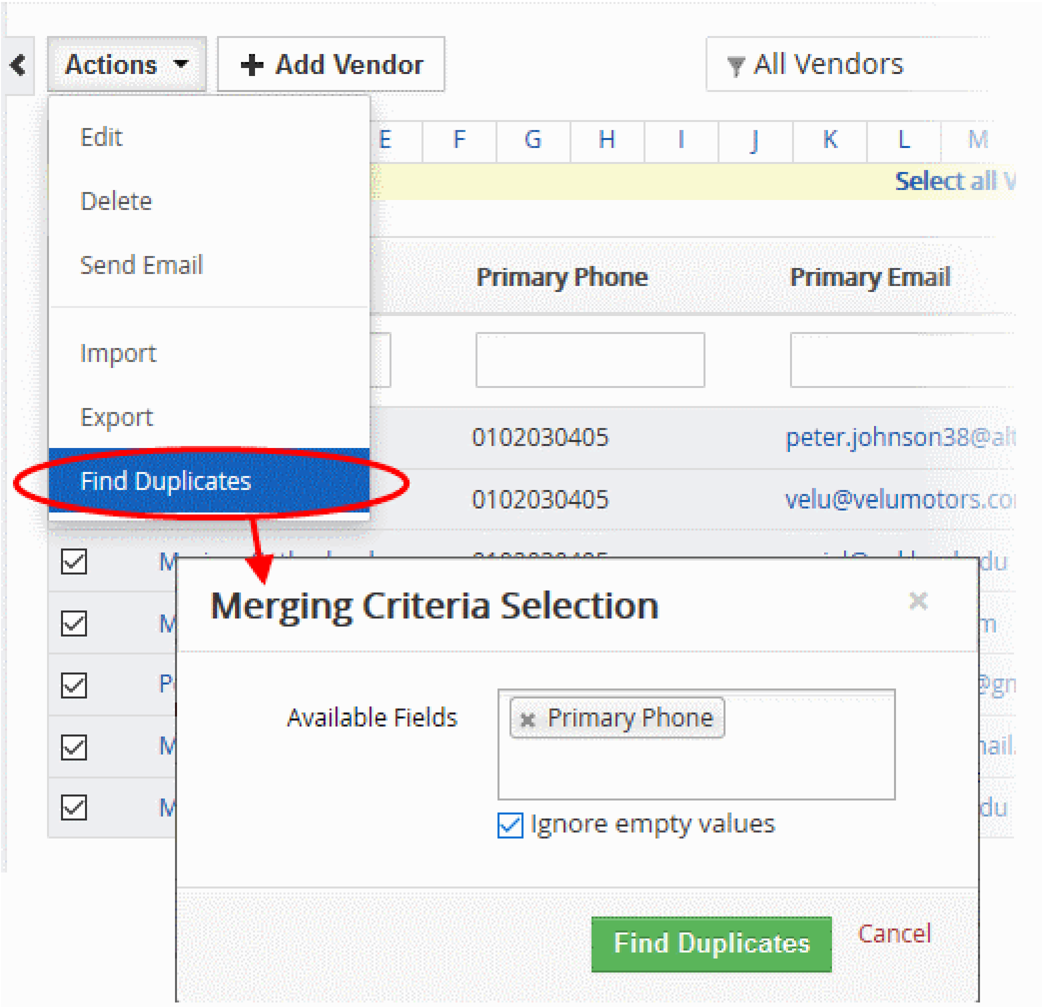
- Click 'All' > 'Vendors'

- Click 'Actions' > 'Import'
- Browse to the file containing your vendor records
- Specify the format of your file (.csv or .vcf)
- Click 'Next' to begin the import.

See '**Import and Export Records**' for more information.

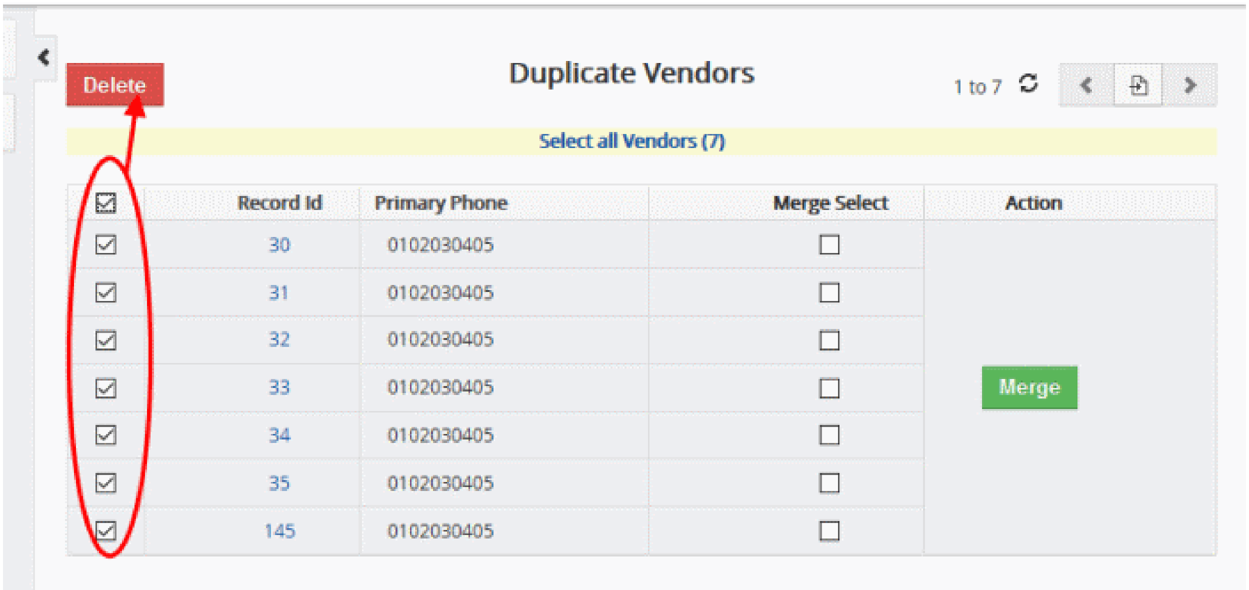
To find duplicates

- Click 'All' > 'Vendors' to open the 'Vendors' interface
- Click 'Actions' > 'Find Duplicates'

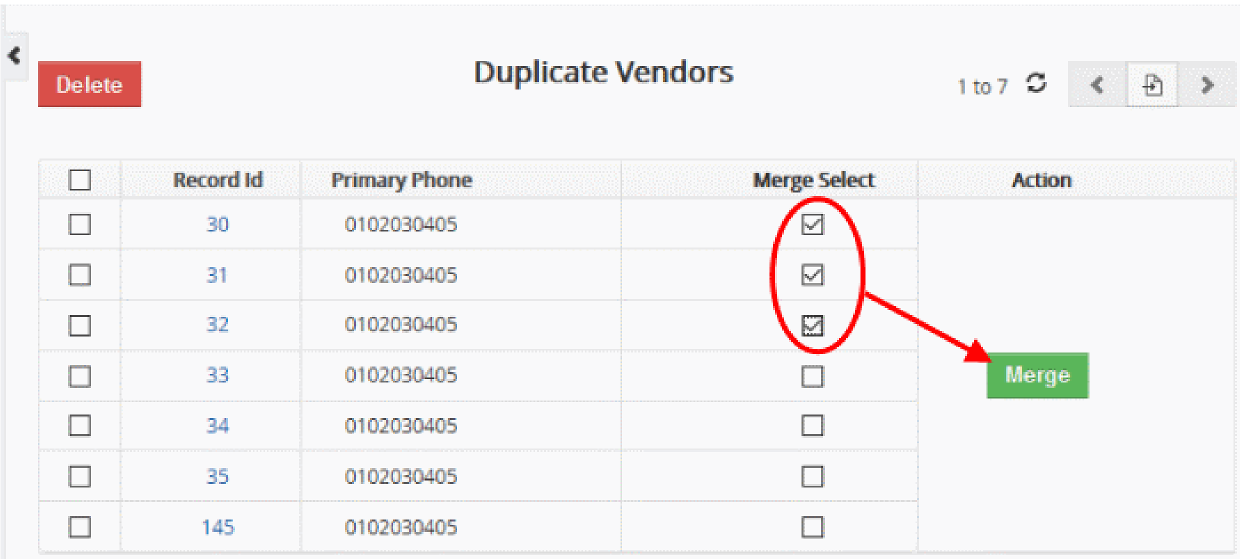


- Click in the 'Available Fields' box and choose the fields you want to search for duplicates. For example, 'Primary Phone' will flag vendors that have the same phone number. You can add as many fields as required.
- 'Ignore empty values' - The CRM will not consider matching blank fields as indicating a duplicate.
- Click 'Find Duplicates' to start the search.

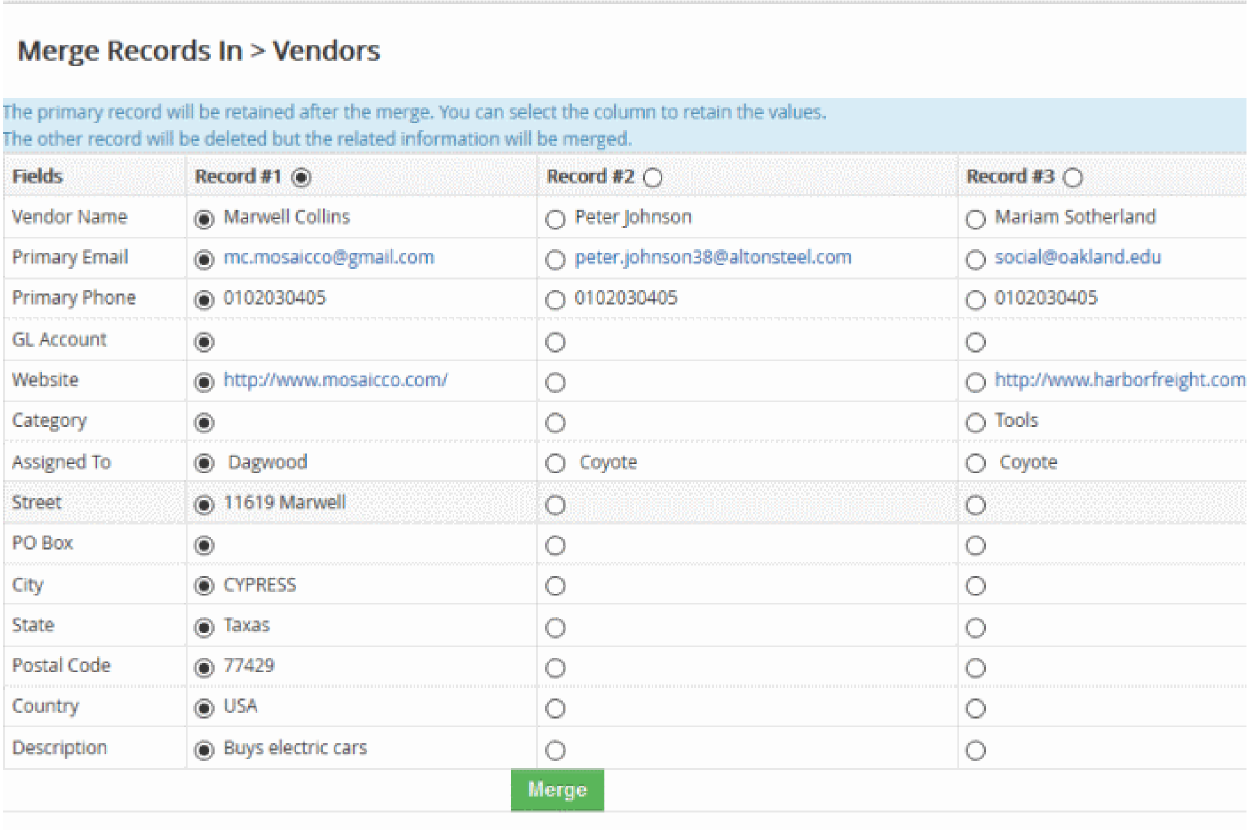
Any duplicates found will be listed as follows:



- Delete duplicates - Use the check-boxes on the left to select the records you want to delete. Click the 'Delete' button.
- Merge duplicate records - Use the check-boxes under 'Merge Select' to choose the records you want to merge. Click the 'Merge' button”



- Next, you have to specify which information to include in the merged record:

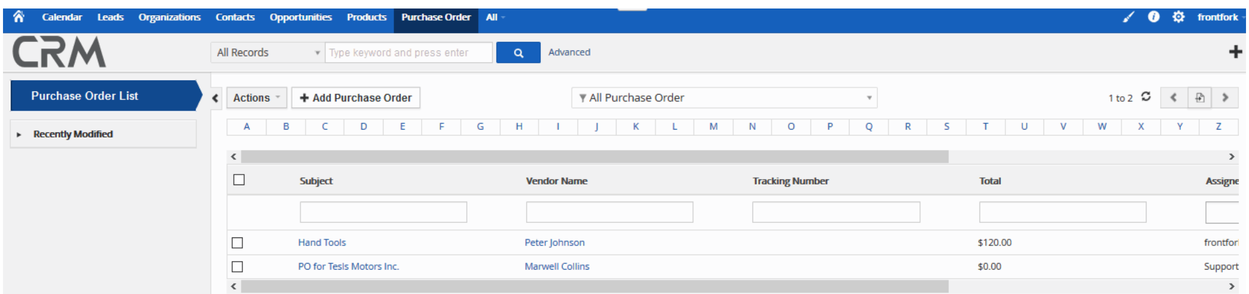


- The record selected in the header row is the 'primary' record. This is the one that will be kept after the merge.
- You can change the primary record by choosing a different record.
- Select the field row values that you want to retain. Please note you can select only one value from each record.
- Click 'Merge'. The information will be merged into a single record in the 'Vendors' interface.

4.6. Purchase Orders

A 'Purchase Order' (PO) is a legal document given to a vendor to purchase products or services.

- Click 'All' > 'Purchase Order' to open the PO admin interface
- Click 'All' > 'Purchase Order' > '+ Add Purchase Order ' to create a new PO
- Use the check-boxes at the left of each record to select one or multiple purchase orders
- Click 'All' > 'Purchase Order' > 'Actions' to run a variety of tasks. Tasks include 'Edit', 'Delete', 'Send Email', 'Import', 'Export' and 'Find duplicates'.



Click the links below for more details on the purpose order module:

- **Add a Purchase Order**
- **Manage Purchase Order Activities**
- **Mass Management of Purchase Orders**

4.6.1. Add a Purchase Order

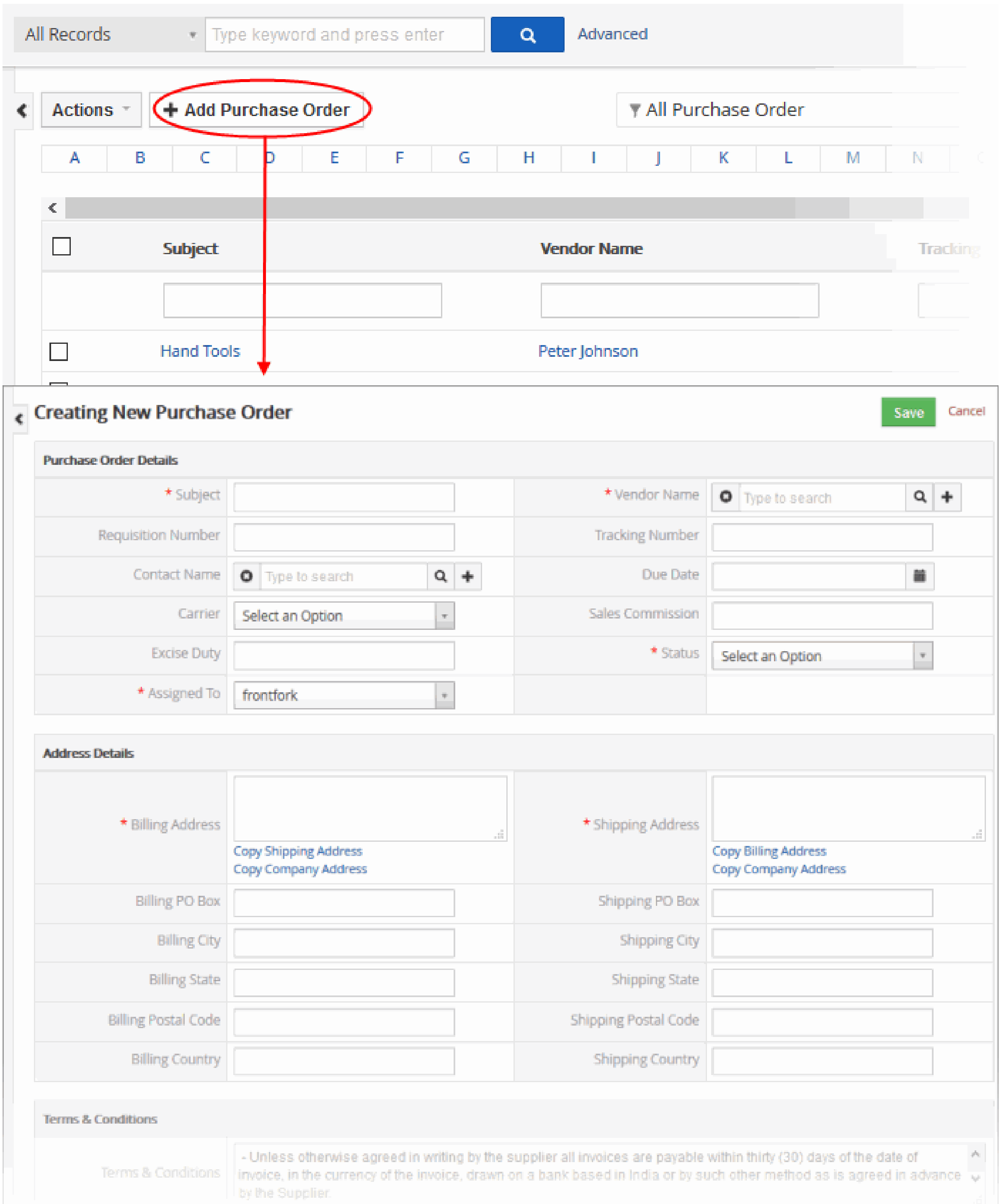
There are three ways to create a purchase order record:

- Click 'All' > 'Purchase Order' > 'Add Purchase Order'.
  This will open the full 'New Purchase Order' form. See '**Create a New Purchase Order Record'** for more information.
- Clone a record - Duplicate an existing vendor record to use as template for a new vendor record. See '**Clone a Purchase Order Record** for more information.
- Import purchase order records - Import a list of purchase order records from .csv or .vcf file. See '**Import Purchase Order Records**' for details.

Create a New Purchase Order Record

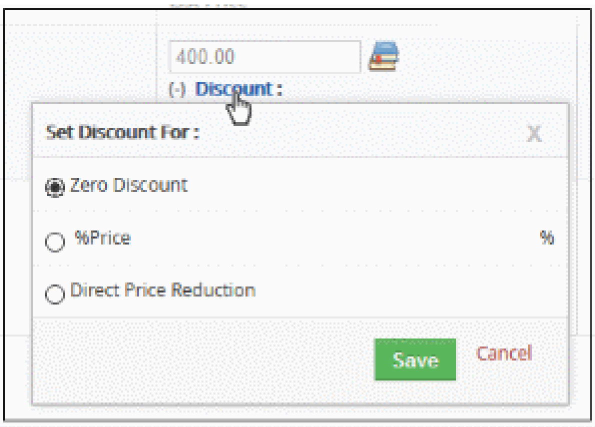
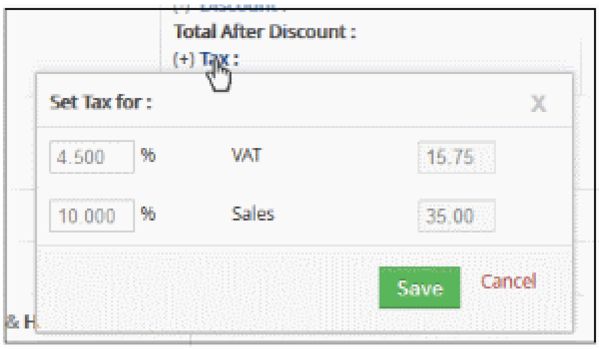
- Click 'All' > 'Purchase Order'
- Click the 'Add Purchase Order' button

The 'Create New Purchase Order' page will open:



Create New Purchase Order - Form Parameters	
Form Parameter	**Description**
Purchase Order Details	
Subject	Name of the purchase order. This field is mandatory
Vendor Name	Name of the supplier. The field is mandatory
Requisition Number	Official claim order number of the purchase order
Tracking Number	The number used to internally track purchase orders.

Contact Name	The CRM contact to whom the purchase order should be sent. Click 'Actions' > 'Send Email with PDF' to mail the order to the contact.
Due Date	Select the date for the purchase order
Carrier	Select the name of the shipping company.
Sales Commission	Enter the staff member's sales commission. Additional compensation for the staff member who successfully processed the sales order.
Excise Duty	Duty rate for the shipment.
Status	The different progressing stages of the purchase order
Assigned to	Select the staff member responsible for the purchase order.
Terms & Conditions	
Specify the terms and conditions that are associated with the purchase order.	
Description Details	
Description	Enter additional information on the purchase order
Item Details	
Lets you add products/services, manage prices/taxes and offer discounts.	
Item Name	• Type the name of the product you wish to add. Matching items will automatically shown as suggestions. • Alternatively, click the product / services icon and select the product / select from the pop-up screen.
Tools	• Click the trash can icon to remove the product / service. • Click and drag a product to re-position it in the list.
Add Product / Add Service	Allows you to add a product / service to the invoice.
Currency	
Currency	Select the currency for the invoice. You can add and manage new currencies in 'CRM Settings' > 'Other Settings' > '**Currencies**'.
Quantity	For each product / service, a corresponding quantity / list price fields will be available. • Specify the quantity for which the invoice has to be generated
List Price	The defined price for the **product**. You can change the price manually or by selecting a **Price Book**. • Click the '**Discount**' link to offer discounts on the List Price.

	 • Select '%Price' to provide discount by percentage • Select 'Direct Price Reduction' to provide flat discount on price. • Click 'Tax' link to change the tax structure. Please note this will be available for 'Individual' tax mode.  • Enter the new applicable tax(es)
Tax Mode	
Individual	If this option is selected, the 'Tax' link will be displayed allowing you to edit the individual tax rate defined for the **product**.
Group	If this option is selected, all the taxes that are enabled for the **product** will be applicable and you cannot edit the rates here.
Total	Displays the price details for the product including discount and taxes
Net Price	Displays the total price of the product

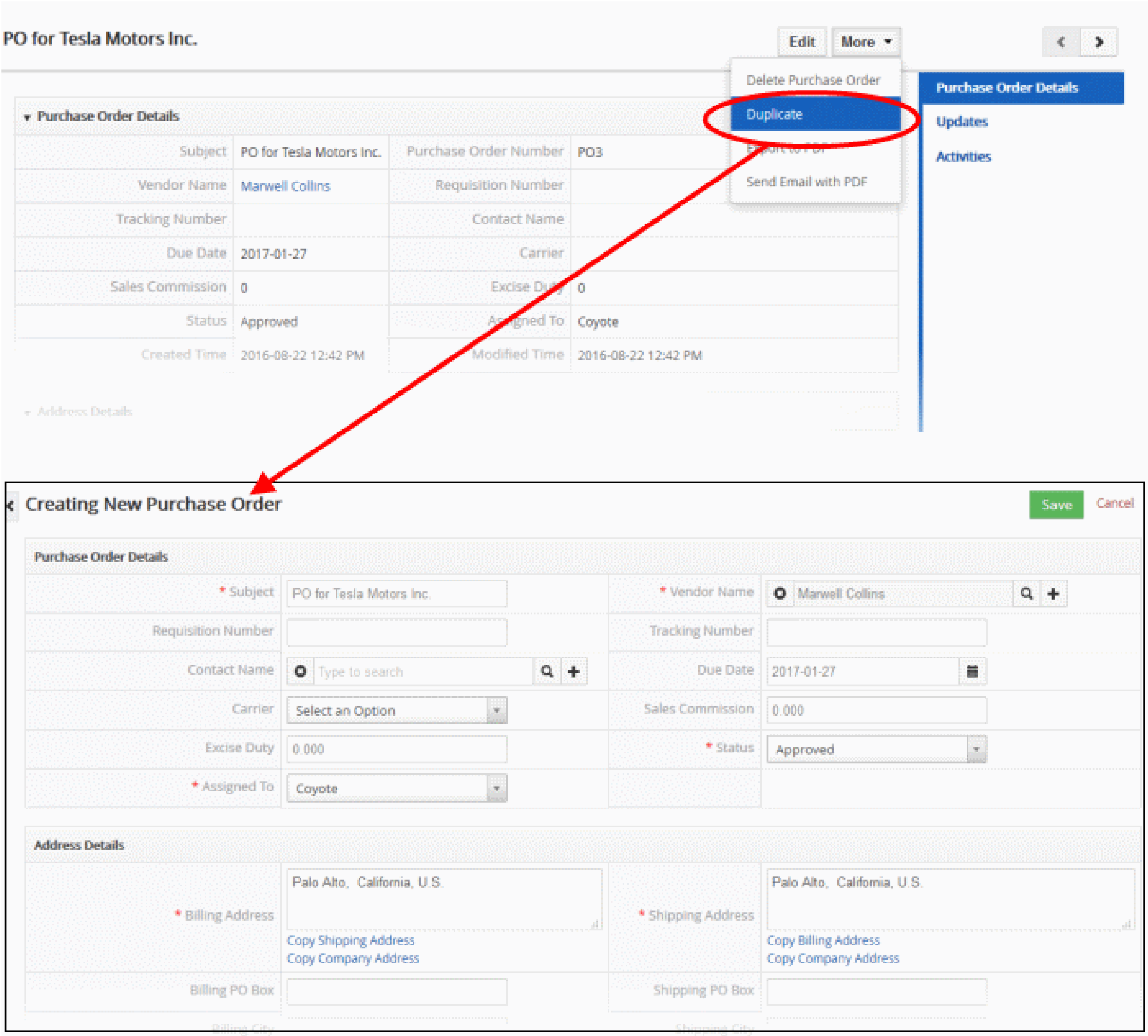
- **Terms and Conditions** - Update the terms and conditions if any
- **Items Total** - Total price of all products and services in the quote.
- **Discount** - Total discounts across all products and services.
- **Shipping & Handling Charges** - Enter the shipping and handling charges for all items.
- **Pre-Tax Total** - Total price of all products and services before taxes are applied.
- **Tax** - Click the 'Tax' link to view set tax. Note: This field will appear only for 'Group' tax mode.
- **Adjustments** - Specify if there are any adjustments such as discounts or extra charges on the taxable amount.
- Click 'Save'. The purchase order will be saved and added to the list in the 'Purchase Order List' interface

Clone a Purchase Order Record

CRM allows you to copy an existing purchase order record to use as a template for a new record. You can then edit the cloned record as required.

To clone a purchase order record

- Click 'All' > 'Purchase Order' to open the 'Purchase Order List' interface
- Click the name of the purchase order record you want to clone
- Click 'More' at the top-right and choose 'Duplicate'



The 'Create New Purchase Order' form will open with the details populated from the original record.

- Edit the details as required to create your new purchase order. Descriptions of the form parameters are available in the **table above**.
- Click 'Save'.

The purchase order record will be saved and added to the 'Purchase Order List' interface.

Import Purchase Order Records

Another method of creating purchase order records is to import from a .csv or .vcf file. Please make sure all mandatory fields required to create a new record are present in your import file.

To import purchase order records

- Click 'All' > 'Purchase Orders' to open the 'Purchase Order List' interface
- Click 'Actions' > 'Import'

Follow the on-screen instructions to import the desired purchase order records. See '**Import and Export Records**' for more information.

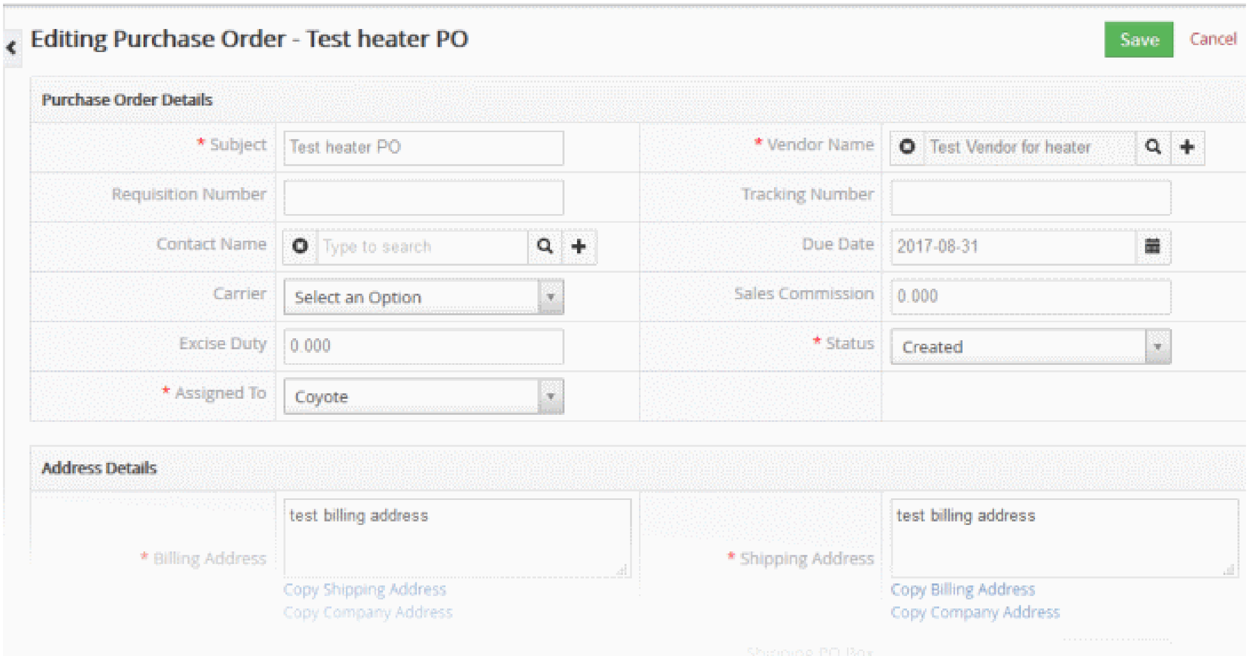
4.6.2. Manage Purchase Orders

- Click 'All' > 'Purchase Orders' to open the purchase order interface.
- The interface lists all purchase orders added to the CRM inventory. Key information is also shown for each order, including subject, vendor name, tracking number, PO value and assigned staff member.
- The 'Actions' menu lets you edit, delete, import, export and de-duplicate purchase orders.
- You can perform actions on multiple purchase orders at once. Use the check-boxes on the left to select the orders you want to work on.
- Click on a purchase order to view it's full details. From the details page, you can:
  - Edit - Click the 'Edit' button to change order/address details or change products and pricing
  - Manage- Click the 'More' button to delete, duplicate or export the purchase order. You can also email the order to the customer contact.
  - View - The links on the right let you view all updates and activities on the order. You can also add new 'to-do' activities.

Edit A Purchase Order

- Click 'All' > 'Purchase Order' to open the PO list.
- Click on a purchase order then click the 'Edit' button.

  OR
- Click 'All' > 'Purchase Order' to open the 'Purchase Order List' interface.
- Place your mouse cursor over the purchase order name to reveal the action buttons on the right of the row.
- Click the 'pencil' icon to open the purchase order edit interface:



- See **this table** for descriptions of the fields in the 'Purchase Order Details' interface

The links on the right of a purchase order detail page let you view and manage the following items:

- Purchase Order Details - Shows complete purchase order details
- Updates - Shows all modifications done to the purchase order record
- Activities - Add and manage 'To Do' activities for your personal notes.
- Click 'Edit' to modify purchase order information:
- 'More' menu:
    - 'Delete Purchase Order' to delete purchase order record
    - 'Duplicate' to clone the record to use it as the basis for a new purchase order. See '**Clone a purchase order record**' to know more.
    - 'Export to PDF' to export the purchase order record
    - 'Send Email with PDF' to send the purchase order to a contact as pdf attachment. See '**Emails**' to find out more.

Manage Purchase Orders

- Click 'All' > 'Purchase Order' to view all existing purchase orders
- Select the purchase orders you want to work on using the check-boxes to the left
- Click the 'Actions' button
- Select the action you want to perform.
- Mass management actions include 'edit', 'delete', 'send email', 'de-duplicate', 'import' and 'export'

Tip: If you want to update the details of a ***single*** purchase order record:

- Open the 'Purchase Order List', click the purchase order name then click the 'Edit' button.
- See '**Manage Purchase Orders**' for more details.

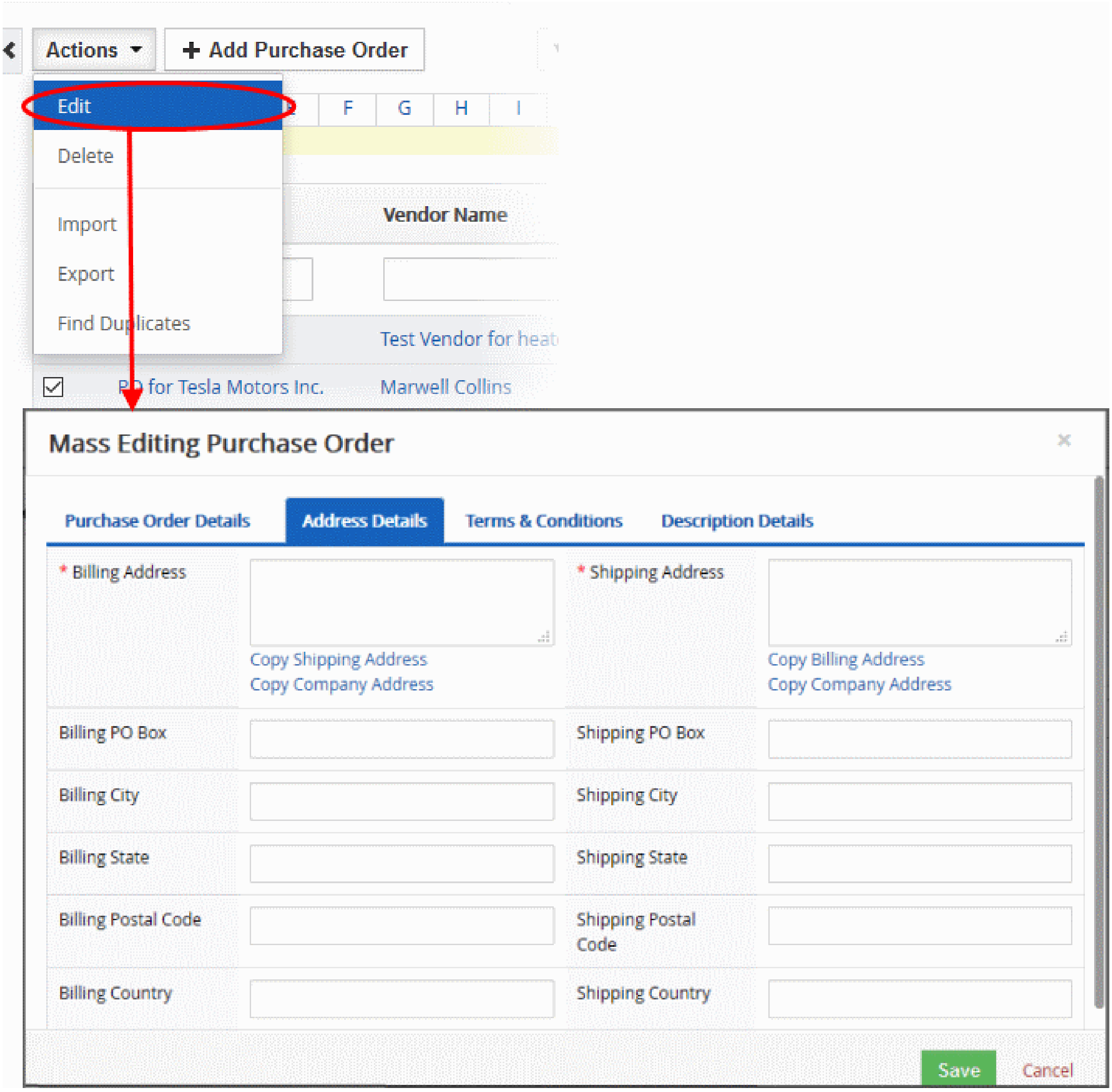
The interface allows you to:

- **Mass edit purchase order records**
- **Delete purchase order records**
- **Import / export purchase order records**
- **Find duplicate purchase order records**

To edit common details of several purchase order records

- Click 'All' > 'Purchase Order' to open the 'Purchase Order List' interface
- Select the purchase order you want to edit
- Click 'Actions' > 'Edit'

The 'Mass Editing Purchase Order' pop-up will appear:



This interface contains four tabs:

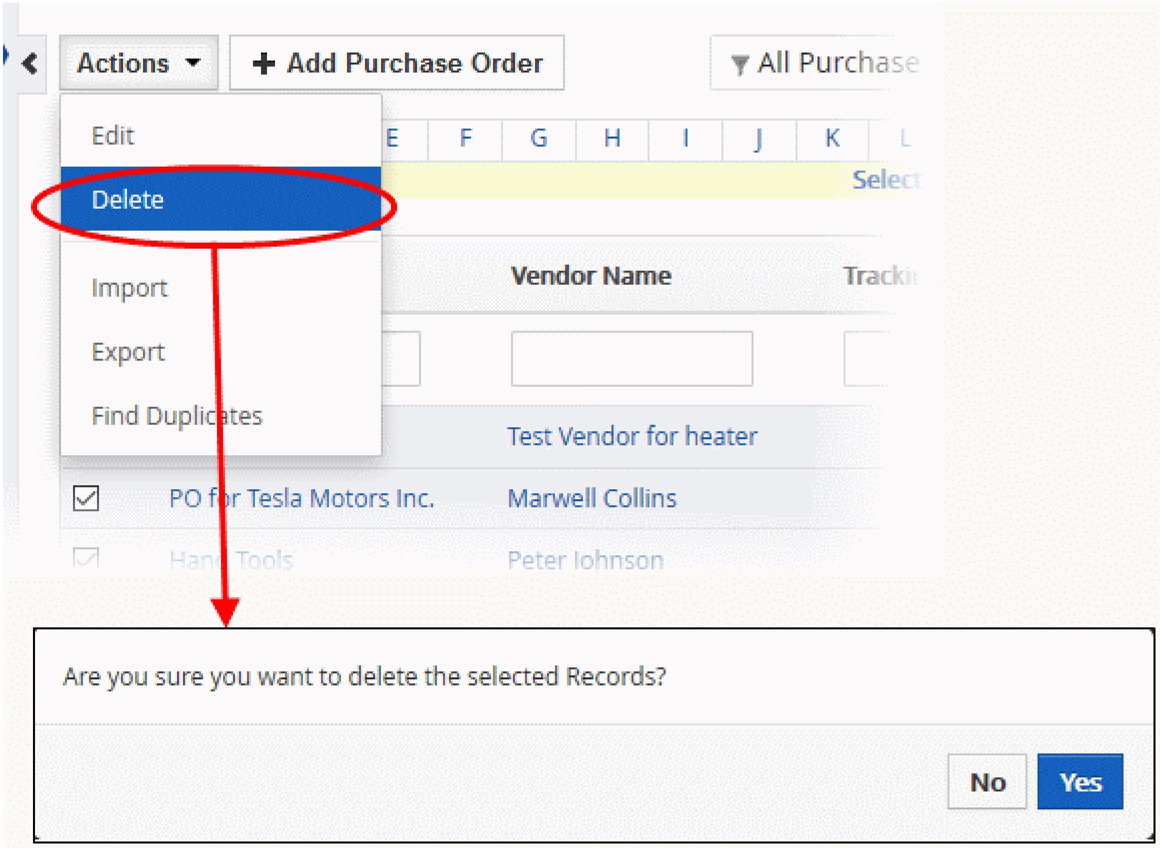
- Purchase Order Details - Allows you to specify subject name, vendor name, requisition number, tracking number and so on. See **this table** for descriptions of the fields in the 'Purchase Order Details' tab.
- Address Details - Allows you to enter the values for billing and shipping addresses in the selected purchase order records.
- Terms & Conditions - Allows you to provide a common 'Terms & Conditions' for the selected purchase order records.
- Description Details - Allows you to enter a common description for the selected product records.

Click 'Save'.

To delete price book records

Price Book records that are no longer required can be removed.

- Click 'All' > 'Purchase Order Book' to open the 'Purchase Order List' interface
- Select the purchase order to be deleted
- Click 'Actions' and choose 'Delete' button.



- Click 'Yes' in the confirmation dialog to remove the record(s)

To import / export purchase order records

Export:

- Click 'All' > 'Purchase Order'
- (Optional) Manually select the purchase order you wish to export
- Click 'Actions' > 'Export'
- Choose whether to export selected records, all visible records, or all records
- Click 'Export Services'.
- The purchase order will be exported to a .csv file

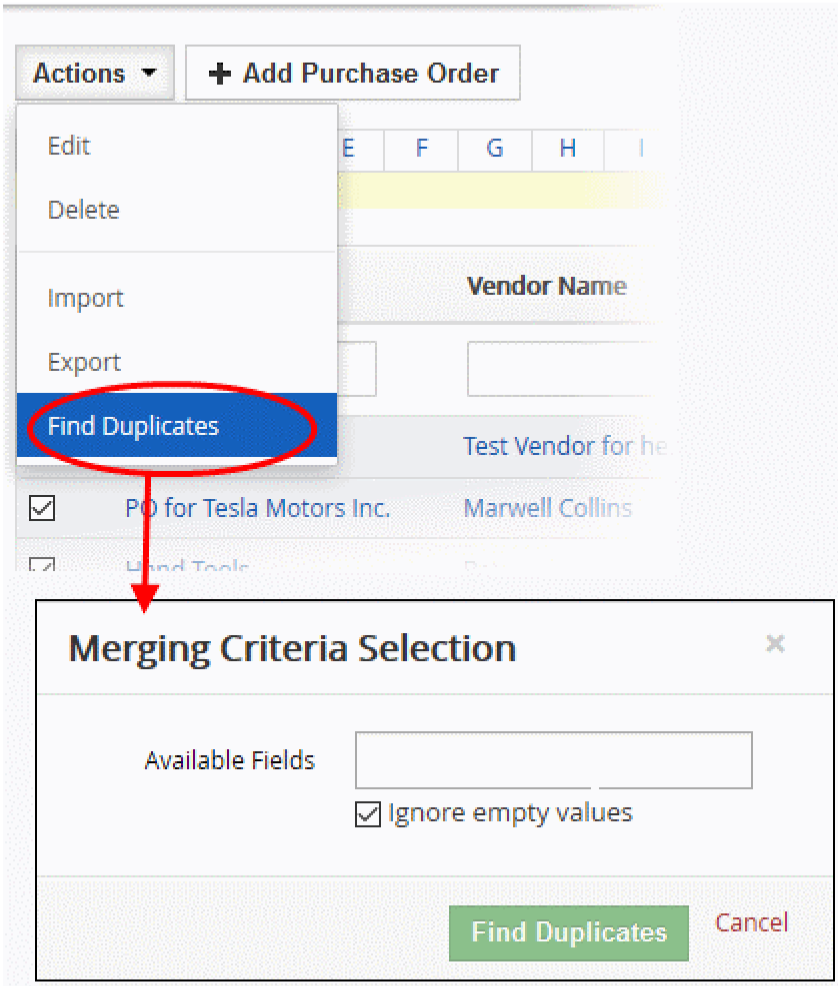
Import:

- Click 'All' > 'purchase order'
- Click 'Actions' > 'Import'
- Browse to the file containing your purchase order records
- Specify the format of your file (.csv or .vcf)
- Click 'Next' to begin the import.

See '**Import and Export Records**' for more information.

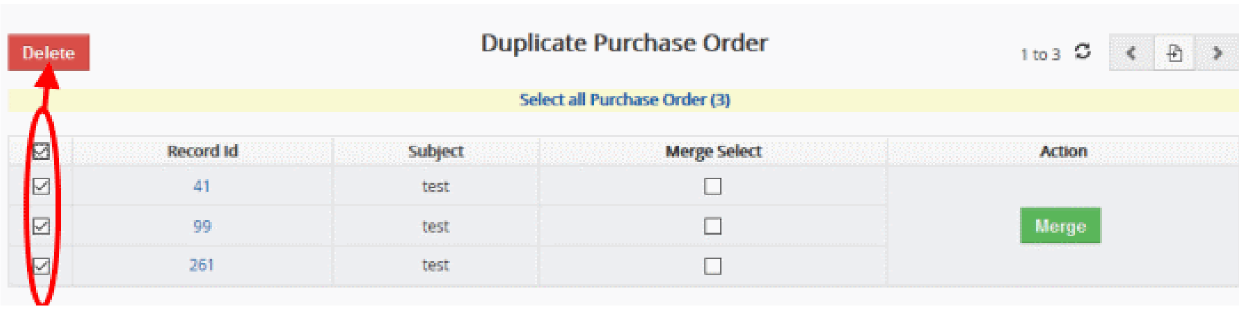
To find duplicates

- Click 'All' > 'Purchase Order' to open the 'Purchase Order' interface
- Click 'Actions' and choose 'Find Duplicates'

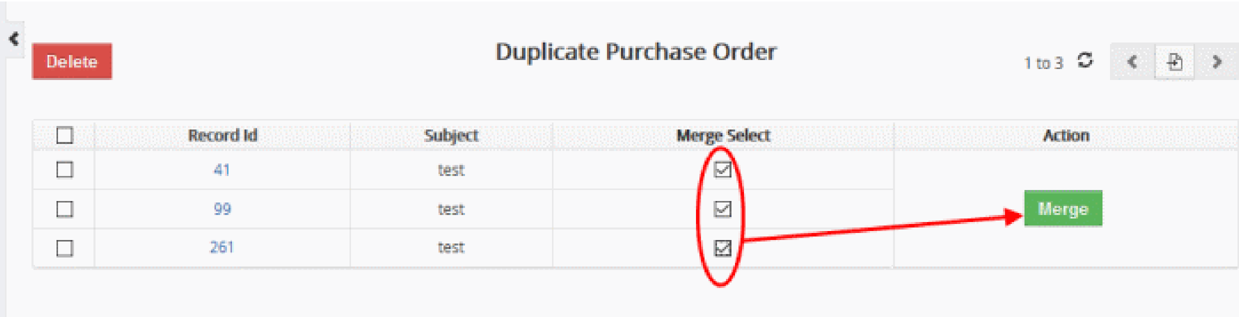


- Click in the 'Available Fields' box and choose the purchase order based fields from the drop down. 'Ignore empty values' means the CRM will not consider matching blank fields as an indication of a duplicate.
- Click 'Find Duplicates'

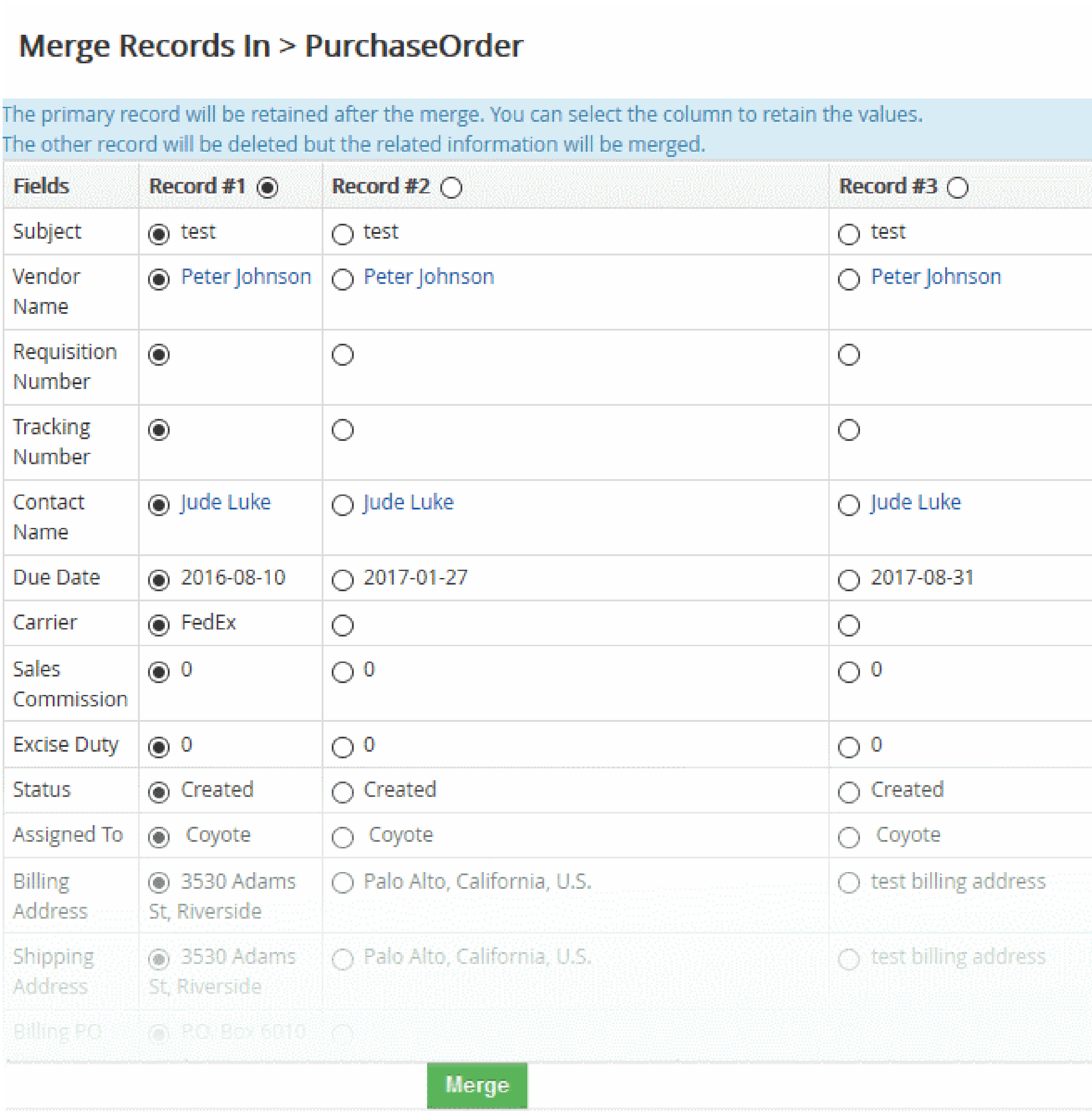
The 'Duplicate Purchase Order' page will be displayed.



- To delete a duplicate price book record, select it and click the delete button at top left.
- To merge duplicate records, select them from the 'Merge Select' column and click 'Merge'



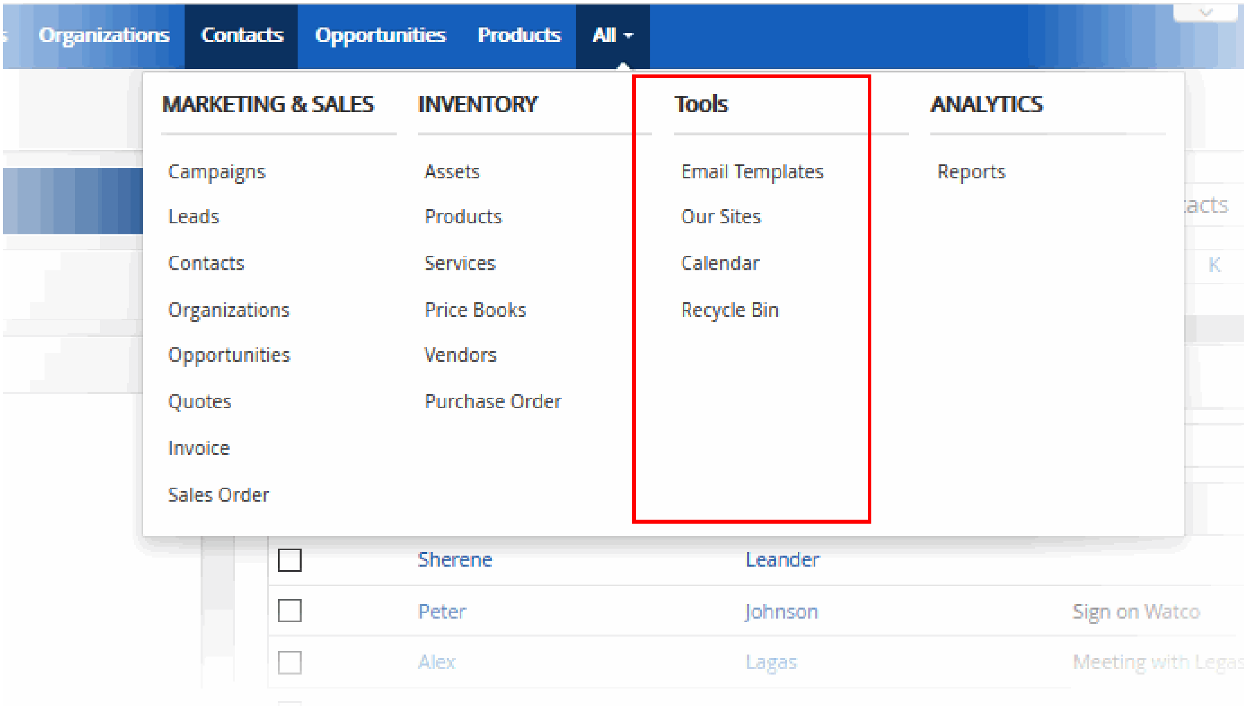
The 'Merge Records In > Purchase Order' dialog will be displayed:



- The selected 'Record #' is the primary record. Select other record to change the primary record.
- Select the column values that should be retained in the merged primary record. Please note you can select only one column value for the merged record.
- Click 'Merge'. The records will be merged and displayed in the 'Purchase Order List' page as per the selected column values.

5. Tools

- Click 'All' > 'Tools' to view items in the tools menu
- The tools menu contains:



- **Email Templates -** View, add and edit company email templates. Templates can be used when sending emails to leads, opportunities, contacts, organizations and vendors. You can also use templates to send quotes, invoices, sales orders and purchase orders.
- **Our Sites -** View, manage and visit websites that have been bookmarked in the CRM. For example, you may wish to bookmark internal company portals or your customer facing websites. Bookmarked websites can be viewed by all staff members.
- **Calendar -** View and add scheduled activities. New activities can be added to the calendar from various CRM modules. For example, you can add a 'Meeting' event to an opportunity or a lead. You can also quickly add a new event by clicking a row in the calendar itself.
- **Recycle Bin -** The recycle bin contains all records that have been deleted from the CRM. The drop-down above the list allows you to filter deleted items by record type. The 'Actions' button allows you to restore selected records. You can permanently delete a record by placing your mouse over a row then clicking the trash can icon on the right.

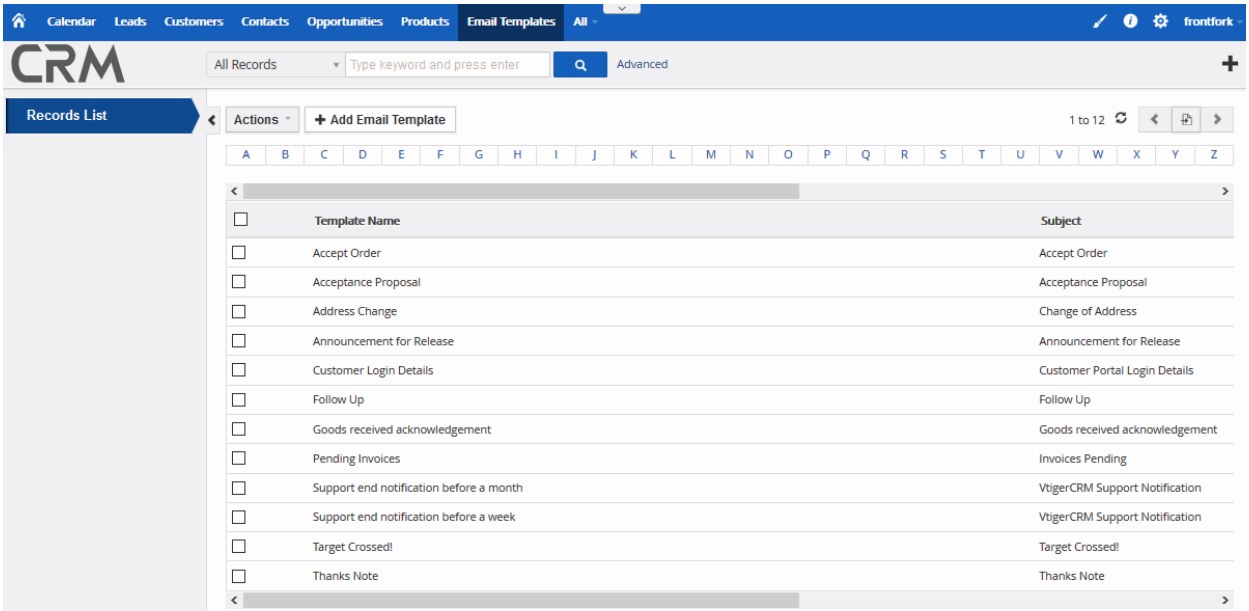
The following sections explain more about each tool:

- Email Templates
- Our Sites
- Calendar
- Recycle Bin

5.1. Email Templates

- Click 'All' > 'Email Templates' to open the template management interface.

- Email templates save your company time and let you send consistent, professional messaging to your customers.
- You can send emails using a template from most CRM modules, including the contacts, organizations, leads, quotes and invoice modules.
- Email templates are fully customizable using the built-in HTML editor. You can use rich text, field variables HTML, styles, images, links and more.
- You can create multiple templates to address specific tasks. For example, you can create different email templates for sending quotes, contacting an opportunity or issuing a sales order. You could also create templates for newsletters, monthly updates, maintenance alerts and more.

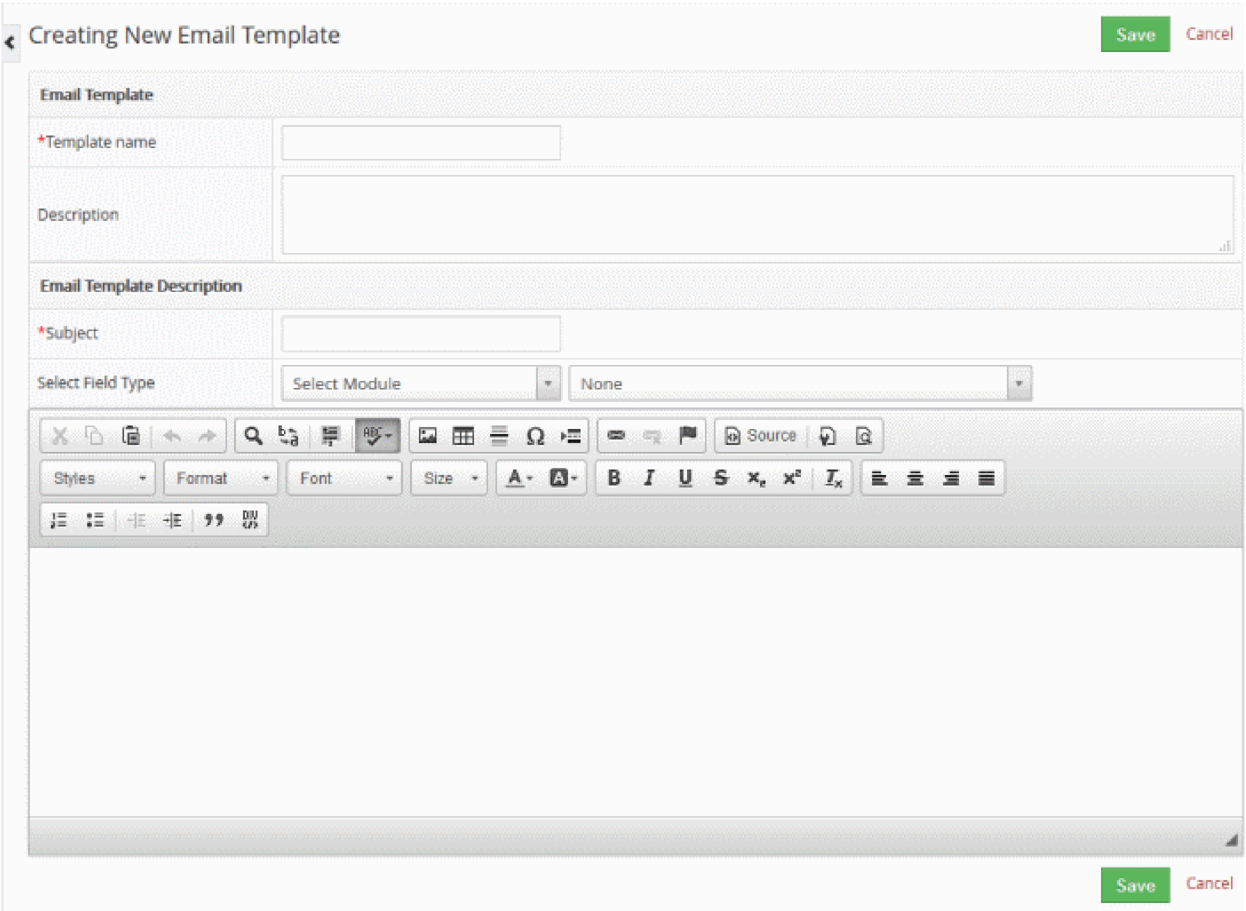


The available options are:

- **Add an email template**
- **Delete an email template**
- **Edit an email template**

To create a new email template

- Click 'All' > 'Email Templates'
- Click 'Add Email Template'.
- Compose your email in the 'Create New Template' interface.

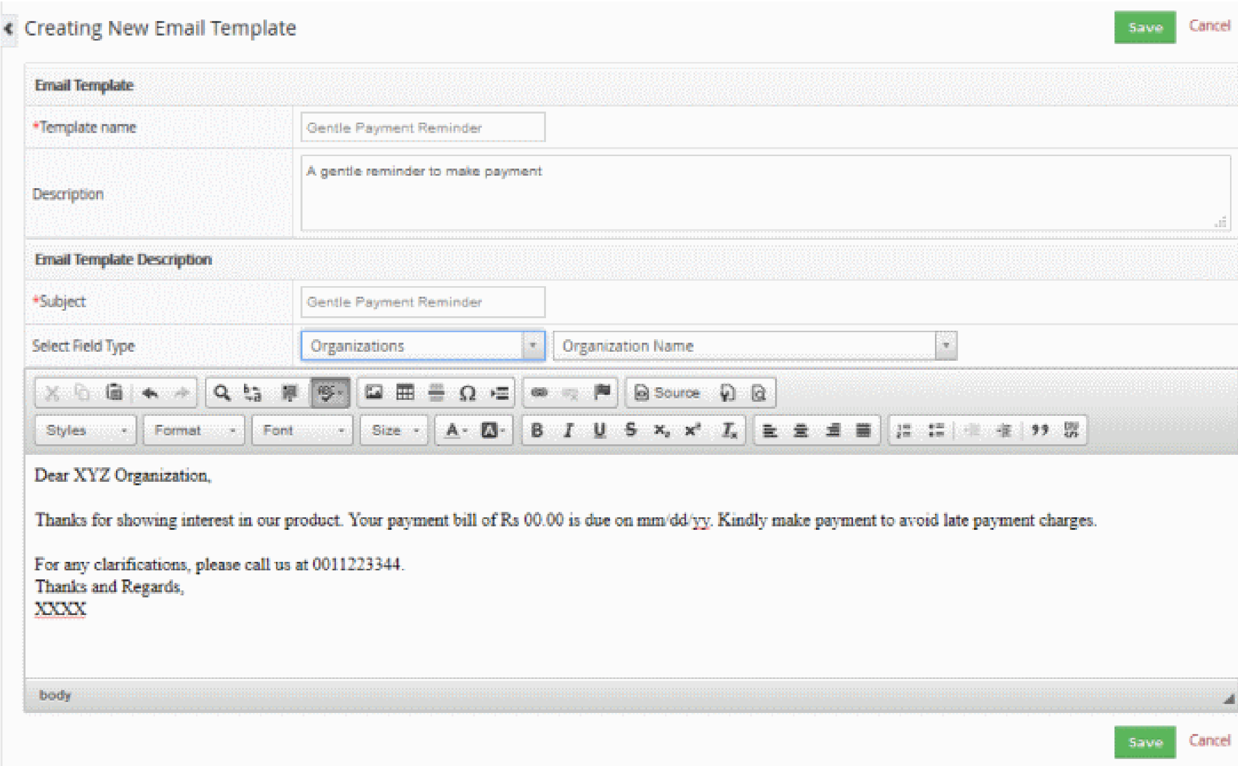


- Template name and description - Create a name and description which accurately describes the purpose of the template. All CRM users will be able to select and use the template, so be as detailed as possible.
- Email Template description:
  - Specify the email subject line.
  - Field Type / Select Module. Allows you to add context-specific variables to your template.

    For example, you might want to automatically add the name of the contact to the start of the mail, or add your company phone number to the sign-off.

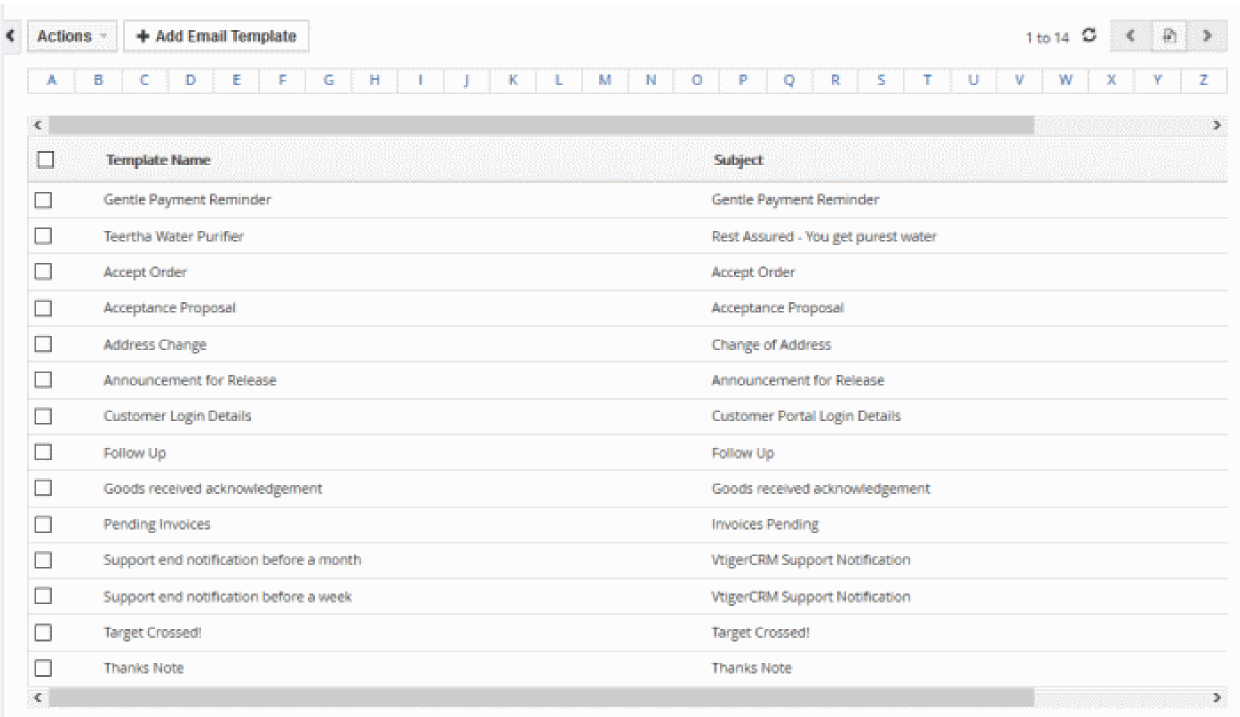
    To add a variable:
    - Place your mouse cursor where you want the variable to appear.
    - Choose the module (record type) from which the variable is drawn.
    - Choose the type of variable you want to insert
  - Compose your message in the large text field
  - Click 'Save' to add your template to the CRM. The template will be available for selection when using the 'Send Email' feature in various CRM modules.

See 3.10.Emails for information about sending emails from other modules



Note: If you create a template for leads when you send emails to leads, only the templates created for lead records will be available.

The new template will be listed in the 'Email Templates' interface.



You can also use a search filter by clicking on a letter in alphabet above the list view to open the list of templates with the selected letter.

To remove some of the unnecessary email template from the CRM that are not useful for future reference:

- Click 'All' > 'Email templates' under 'Tools' to open the 'Records List' interface
- Select the template to remove and click 'Actions', then select 'Delete'
- Click 'Yes to confirm your removal

  OR
- Click 'All' > 'Email templates' under 'Tools' to open the 'Records List' interface
- Place your mouse cursor on the email subject to reveal the action buttons on the right of the row.
- Click the 'Trash' icon to delete the email template

  OR
- Open an email template and then click 'More' > 'Delete'

To modify the existing email template by changing the required fields:

- Click 'All' > 'Email templates' under 'Tools' to open the 'Records List' interface
- Click the template and click the 'Edit' button at top right.

  OR
- Place your cursor on the template record and click the 'pencil' icon beside to edit the email template

To view and manage the email template:

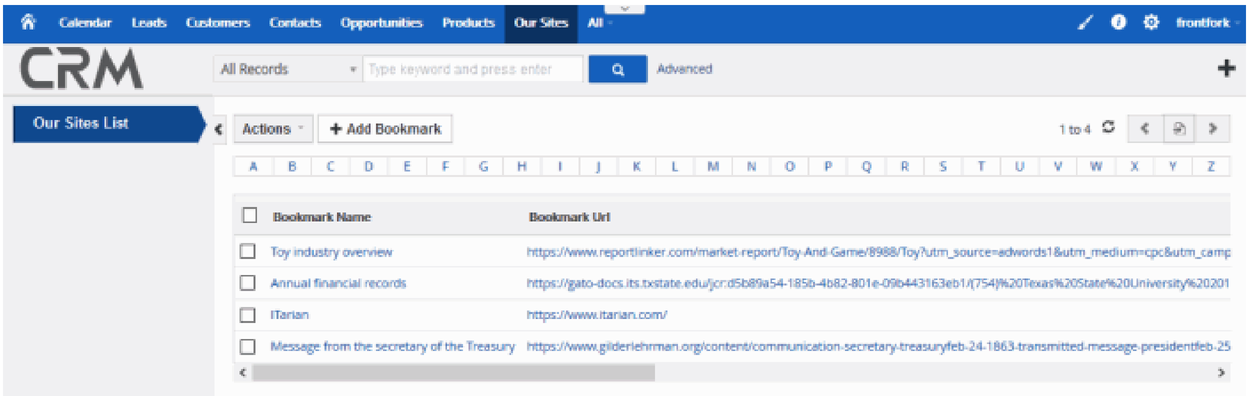
- Place your cursor on the template record and click the 'complete detail' icon on the right of the email template row.

5.2. Add Website Bookmarks

- The 'Our Sites' sections lets you add bookmarks to important internal or external resources. For example, you may wish to bookmark your support portal, your document repository or your marketing shared drive.
- Adding bookmarks allows you to more tightly integrate CRM with your existing sales and marketing infrastructure. All bookmarks will be visible to all team members.

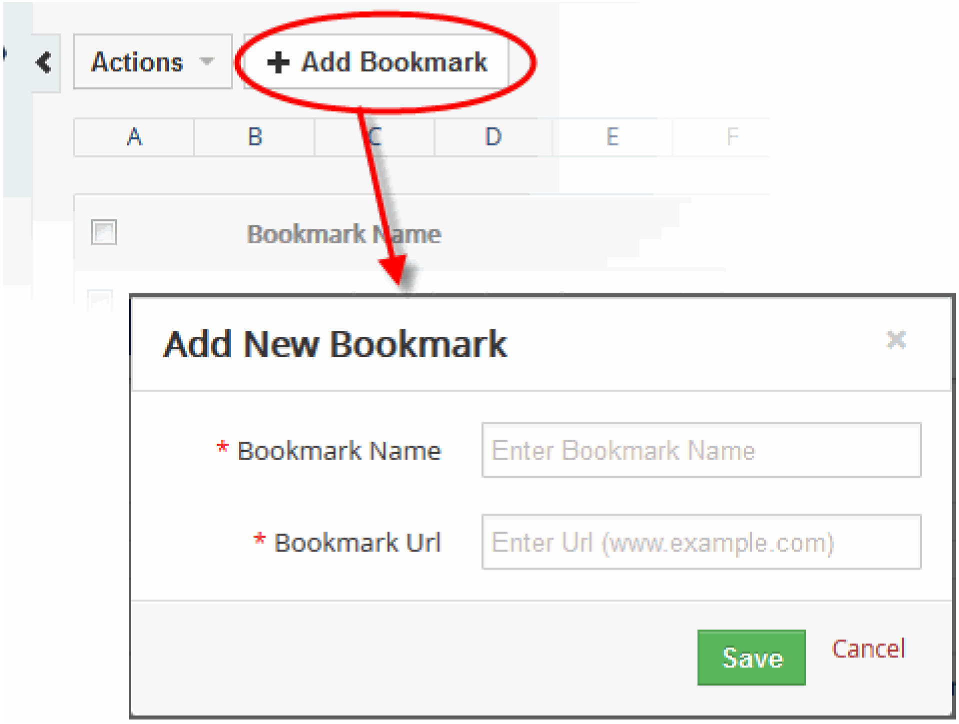
To view view bookmarks:

- Click 'All' > 'Our Sites' to open the 'Our Sites List' interface.



To add a Bookmark :

- Click 'All' > 'Our Sites' to open the 'Our Sites List' interface.
- Click the 'Add Bookmark' button:



- Enter a name for the URL you wish to save. For example, 'Marketing Database'
- Enter the website URL
- Click 'Save'. The bookmark will appear in the 'Our Sites' interface

- To edit a bookmark:
  - Place your mouse cursor on the bookmark and click the edit icon beside it
- To delete a bookmark:
  - Place your mouse cursor on the bookmark and click the 'Trash' icon beside it

    OR
  - Select the bookmark then click 'Actions' > 'Delete'
  - Click 'Yes' to confirm the deletion
- To refresh your bookmarks list:
  - Click the reload button at top-right

Note: You cannot restore accidentally removed bookmarks.

5.3. View and Manage Calendars

The calendar lets you schedule, invite, share, and organize your events with records of other modules and displays a list of activities that are scheduled by you, and shared with you.

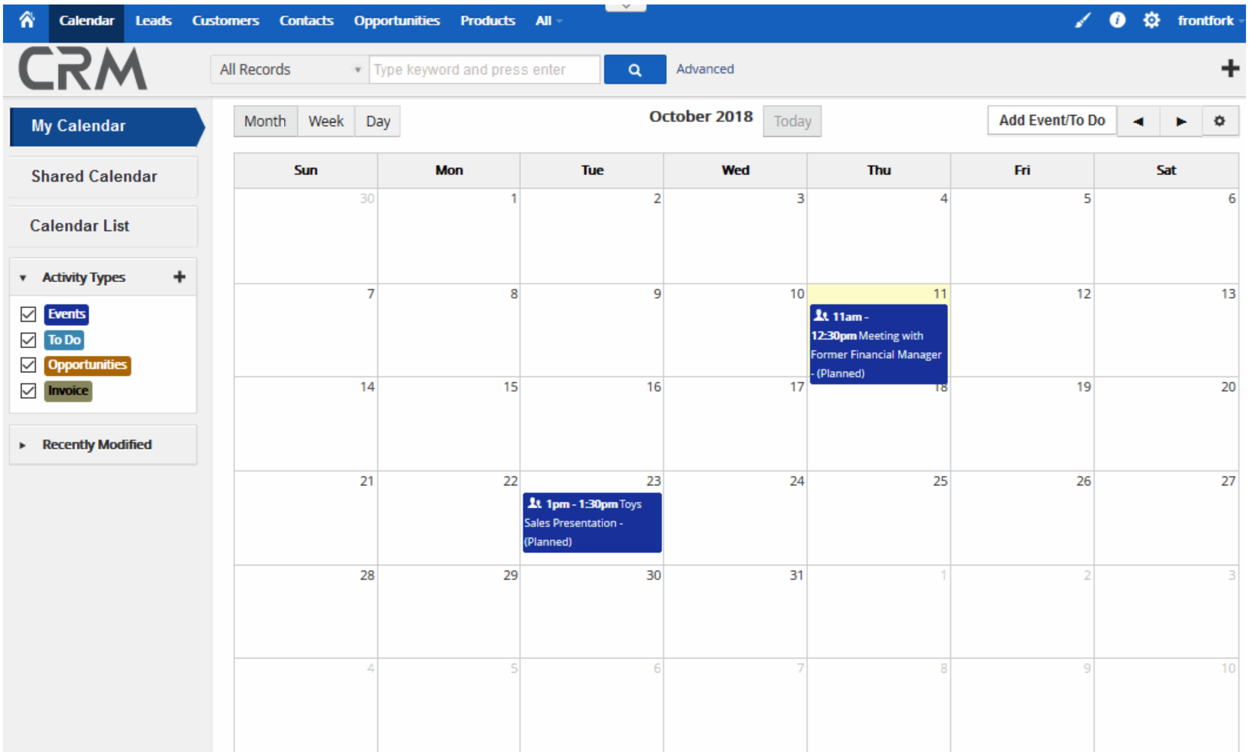
- Click 'All' > 'Calendar' to open the calendar module
- Switch between 'My Calendar' and the 'Shared Calendar' using the links on the right.
  - My Calendar - Lists your personal activities and events
  - Shared Calendar - Shows team activities that have been made public or have been specifically shared with you.
- Use the day/week/month buttons (top-left) and the < > buttons (top-right) to change the time-period

- Click any existing activity in the calendar to view or edit its details.
- Click on any date in the calendar to create a new activity.
- 'Calendar List' shows all activities in table format

To view the 'Calendar' module:

- Click the 'Calendar' button on the CRM file menu

  OR
- Click 'All' > 'Calendar'



There are two types of activity you can add to a calendar:

- **Events -** Events have a set start and end time. Examples include calls, emails and meetings.
- **To Dos -** To-dos are tasks with set start time and a due date. For example you may require a staff member to send a quote to a customer by a certain time.

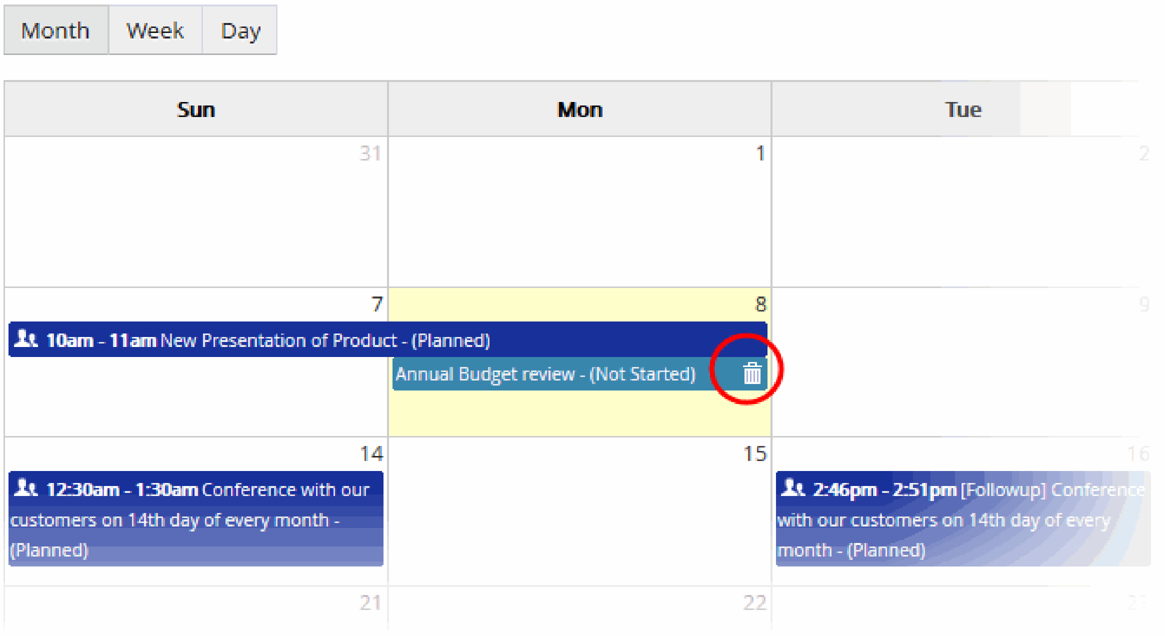
Note: You can only check activities that are assigned to you and the activities of users below you in the hierarchy.

The 'Calendar' Module has three panes:

- My Calendar - Opens your daily (activities scheduled on current day) planner, weekly (activities scheduled on current week) and monthly (activities scheduled on current month) appointments
- Shared Calendar - Opens a shared calendar appointments
- Calendar List - Opens the list of all created appointments.

To remove the event from the calendar:

- Place your mouse cursor on the event and click the 'trash' icon and then confirm your removal.



To view a scheduled 'Event / To do'

- Click 'My Calendar', select the event in the calendar

  OR
- Select the event from the 'Recently Modified' pane

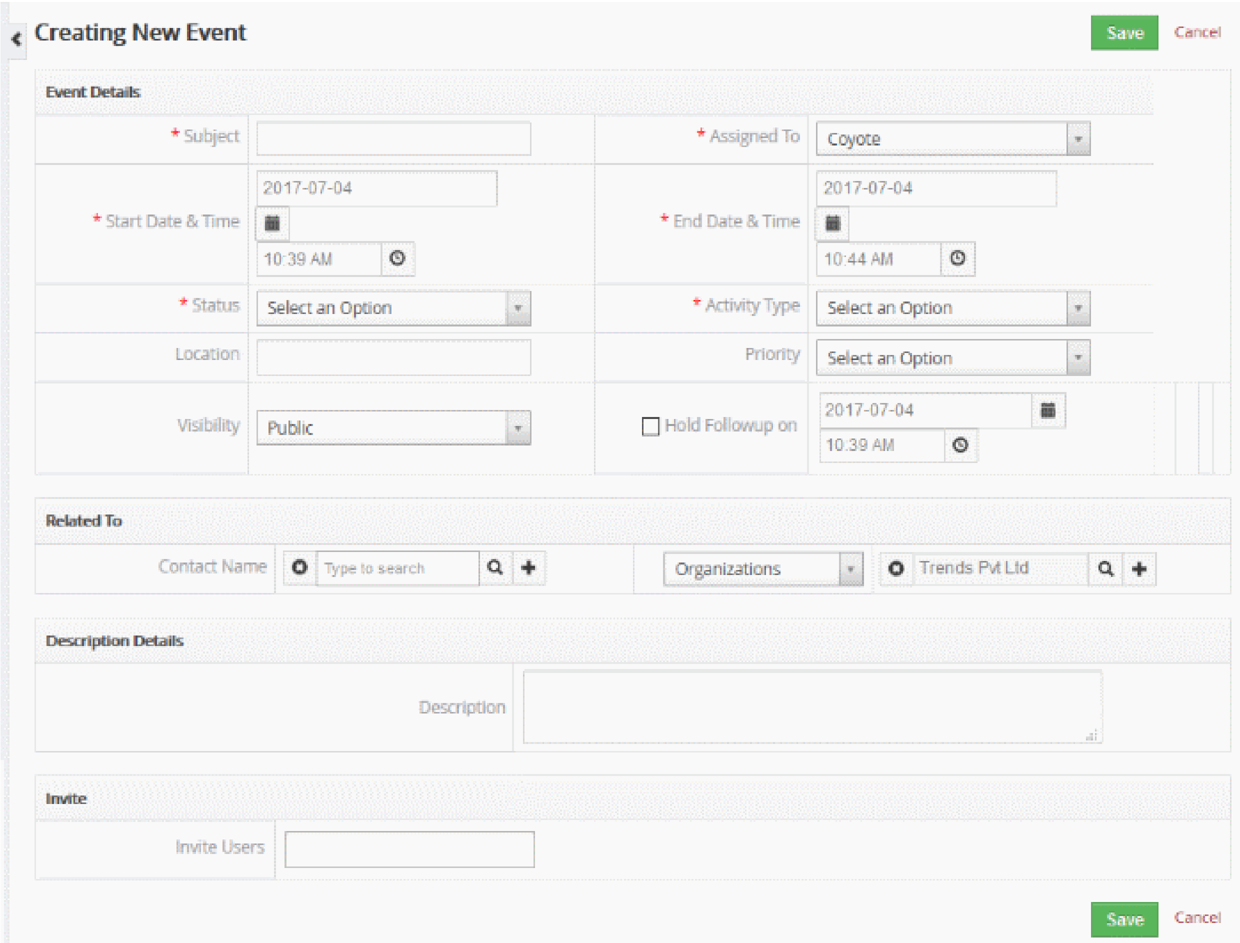
The event page will be displayed. The available options are:

- Add an Event/ To Do
- Edit an event / to do
- Delete To Do
- Duplicate an event
- View updates made in the event

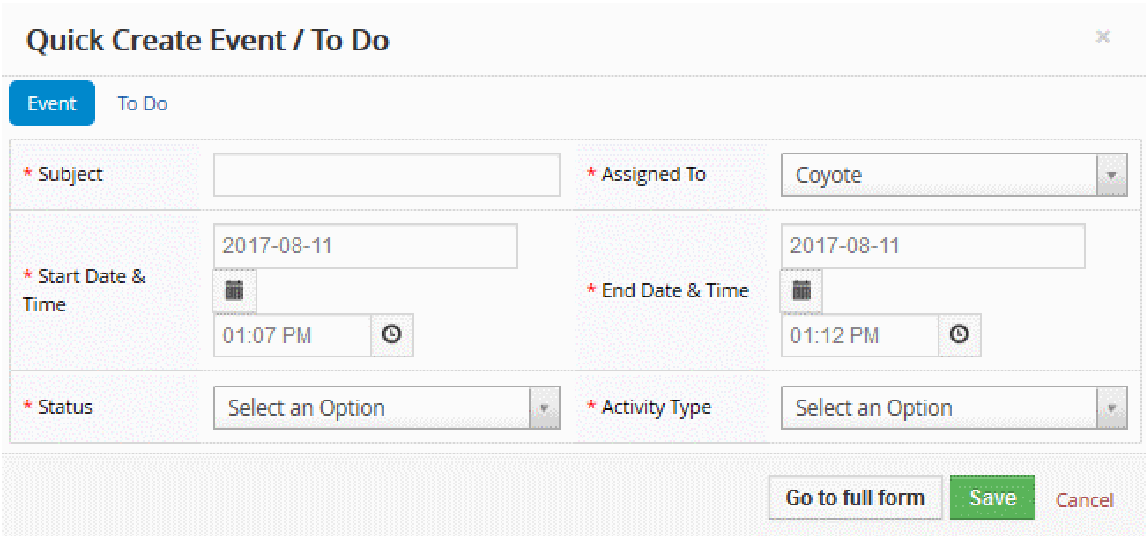
Add an Event/To do record

You can create an 'Event / To do' record in four ways:

- Click 'All' > 'Calendar' > 'Add Event / To Do'.
  - Click 'All' > 'Calendars' > '+ Add Events/To Do'
  - Click 'Add Event' or 'To Do' in the 'Quick Create' dialog and click 'Go to full form' to enter more details to the Event/To do.



- Quick create a record - Add a new Event / To do record with the basic information. Other details can be added later as required.
  - Click '+' > 'Event/To Do' in 'Quick Create dialog'
  - Enter the basic details and click save



- Clone a record - Duplicate an existing record to use as the starting point of a new event / to do record.
  - Click 'All' > 'Calendars' > '+ Add Events/To Do'
  - Click on the event name and then click 'More' button on the top right of the event interface
  - Click 'Duplicate' from the drop down menu

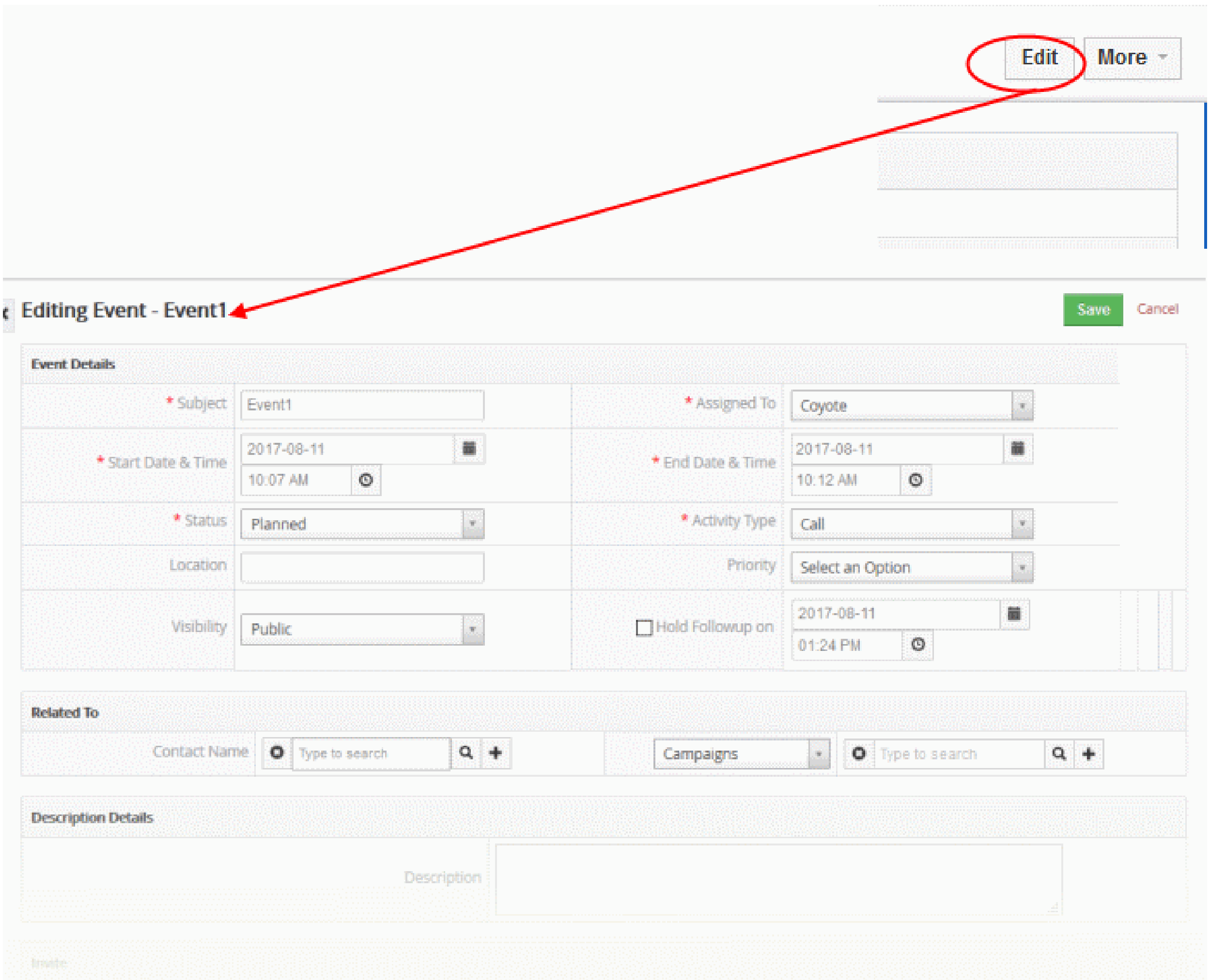
- Create a Event / To do record from within another module (organizations, contacts, leads and more).

Once an 'Event / To do' record is added to the 'Calendar List', you can:

- Track the progress and the responses to the campaign records, conversion of lead records, sales orders generated and close the event once activities are completed. See **Manage Leads**, **Manage Organizations**, **Manage Contacts** and the like to know how a staff member tracks all modules through activities.
- Associate contacts, leads, organizations, opportunities and more based on Event / To Dos and you can send emails to respective contacts as an initiative to complete the sales deal

To edit the event

- Click 'Edit' in the calendar view page to modify the event



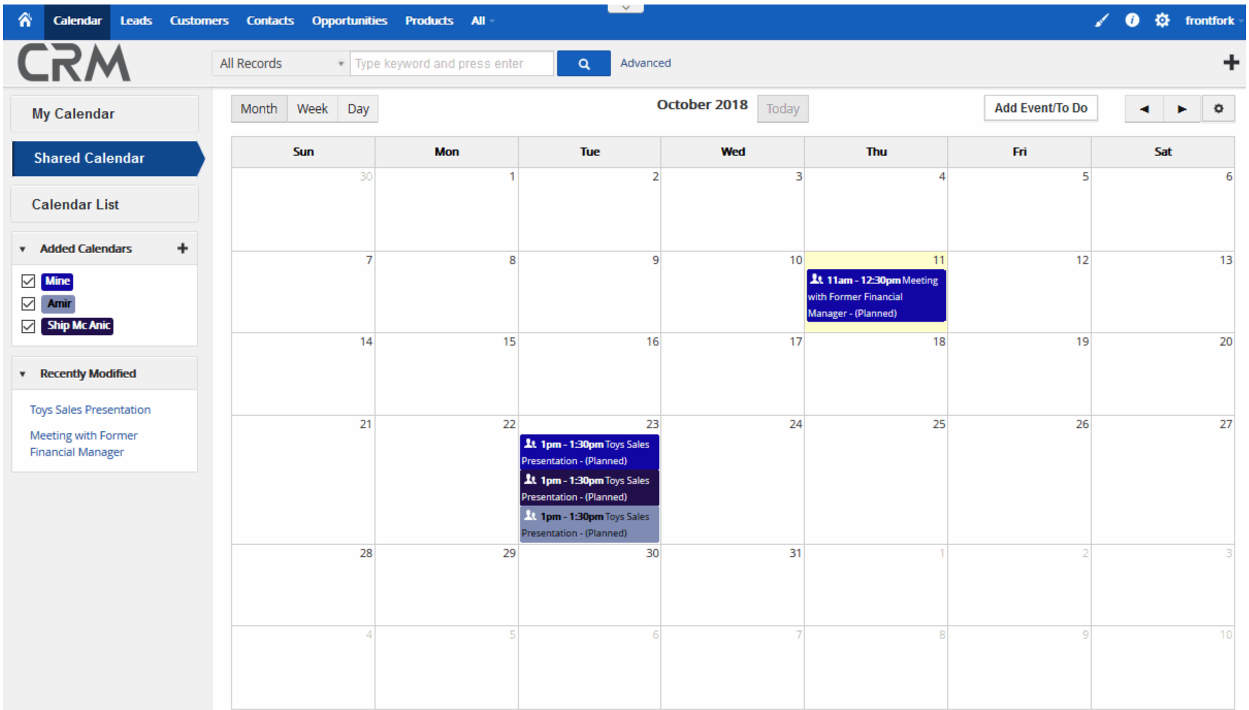
- Update your event details and click 'Save'

To delete an event

- Click the event then 'More' button and select 'Delete To Do'
- Click 'Yes' to confirm the event removal

5.3.1. Manage Shared Calendar

'Shared Calendar' shows all activities that have been shared with you. An activity becomes 'shared' if it's visibility is set to 'Public' or 'Selected Users' in the settings screen.



To schedule an event

- Click the 'Shared calendar' pane
- Click the 'Add Event/To Do'
- In the 'Create New Event' screen, select the 'Activity Type' from the drop-down as either 'Call' to schedule a call, or 'Meeting' to create a meeting request
- Enable the Visibility' checkbox as 'Public' to make the event available to other users. You can limit the availability through **Calendar Settings**.
- Provide a description and location to your event in the text fields event name, description and location respectively and other details

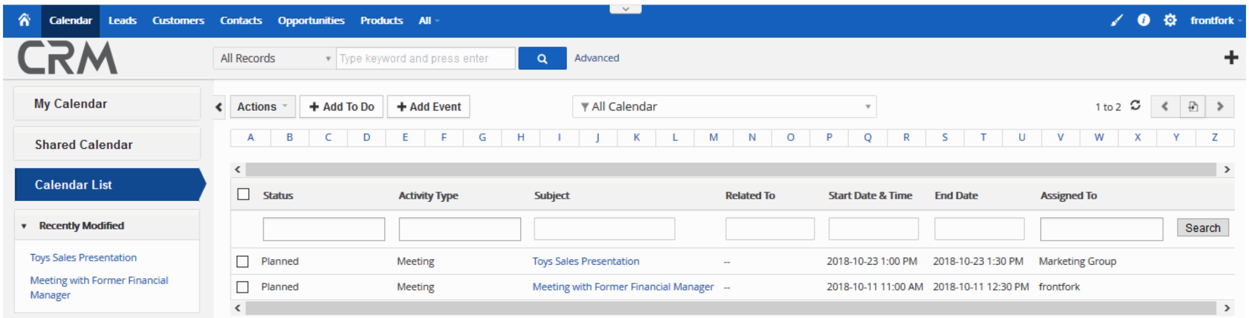
By default, the Calendars are private and are not shared across users. Whereas, To Dos cannot be shared with other users.

The 'Added Calendars' pane contains the list of users associated with your CRM calendar appointments.

- Check box beside the user name to reflect him in the your calendar
- Click the edit icon to change the color of a user
- Click the trash can icon to remove the record in the calendar

5.3.2. Update and Manage Calendar Entries

The calendar list presents all scheduled events in a table, allowing you to more easily locate, view and edit specific events.



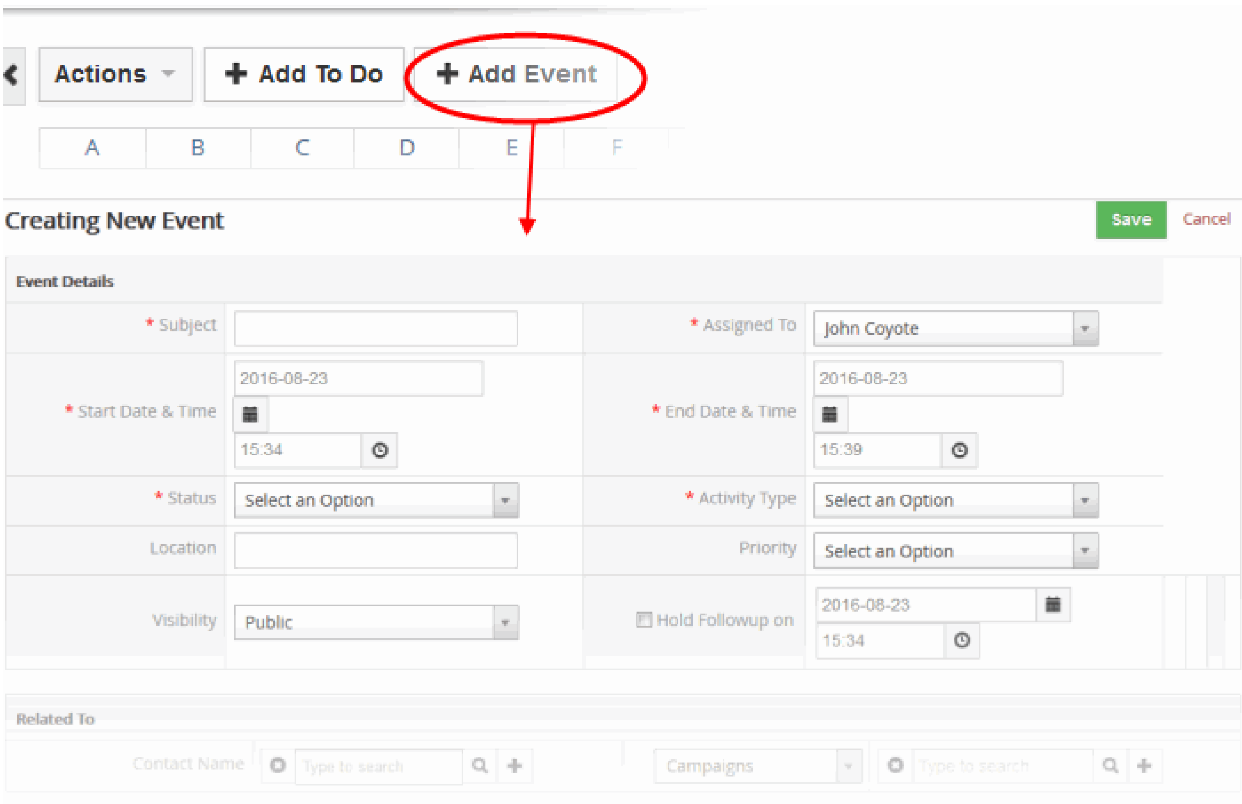
You can adjust the owner or delete a record, to add 'To Do' or 'Event' or create a quick calendar event to add details further. The interface allows to search for a particular calendar event using an alphabet above the list view to open the list of vendors with the selected letter.

You can create a filter for a module view using a drop-down menu above the listed alphabet which lists any created filters and an option to create a new filter. Click here to find more detailed information on creating the vendor filter.

To add To Do/Event,

- Click the 'Calendar list' and click 'Add To Do' or 'Add Event' at the top

The 'Creating New To Do' / Creating New Event' dialog will be displayed. Fill in the following text box/drop-down.



Event Details / To Do Details

- Subject - Type the name of the event. This field is a mandatory
- Assigned To - Specify a user or user group whom the event assigns to. This field is a mandatory
- Start Date & Time - Specify the date and time your event starts. This field is a mandatory
- Due Date (available for To Do) - Specify the due date activity. This field is a mandatory
- End Date & Time (For Event record) - Specify the date and time your event ended

Note: The event start date and time should be greater than equal to current date and time. The event end date should be greater than or equal to event start date. By default, the event end date will be populated five minutes post to event start time.

- Contact Name - Specify the contact name relate to the call, meeting. You can click the '+' icon to quick create the contact or click the lens icon to populate value automatically
- Status - Specify the status of the current event
    - Event has the following available statuses: Planned, Held, Not Held.
    - To Do has the following available statuses: Not Started, In Progress, Completed, Pending Input, Deferred, Planned
- Priority - Select the priority level of the event: High, Medium, Low
- Send Notification (For Event record) - Checkbox if you want to receive a notification
- Activity Type (For Event record) - Specify activities type from the drop-down. To add more types, see **customize your type**
- Location - Specify a location of the event/to do
- Visibility (For Event record) - Specify who will see the event: Public, Private
- Hold Follow up (For Event record) - Checkbox if you plan to continue with this event. Set time and date of the next appointment

Related To - Specify contact name related to the event and target type. You can relate multiple contacts at one shot. Events can be associated with the record in Campaigns, Leads, Organizations, Opportunities, Tickets.

Whereas, To Dos can be associated with the record in Campaigns, Quotes, Purchase Order, Sales Order, Invoice, Leads, Organizations, Opportunity, or Tickets module.

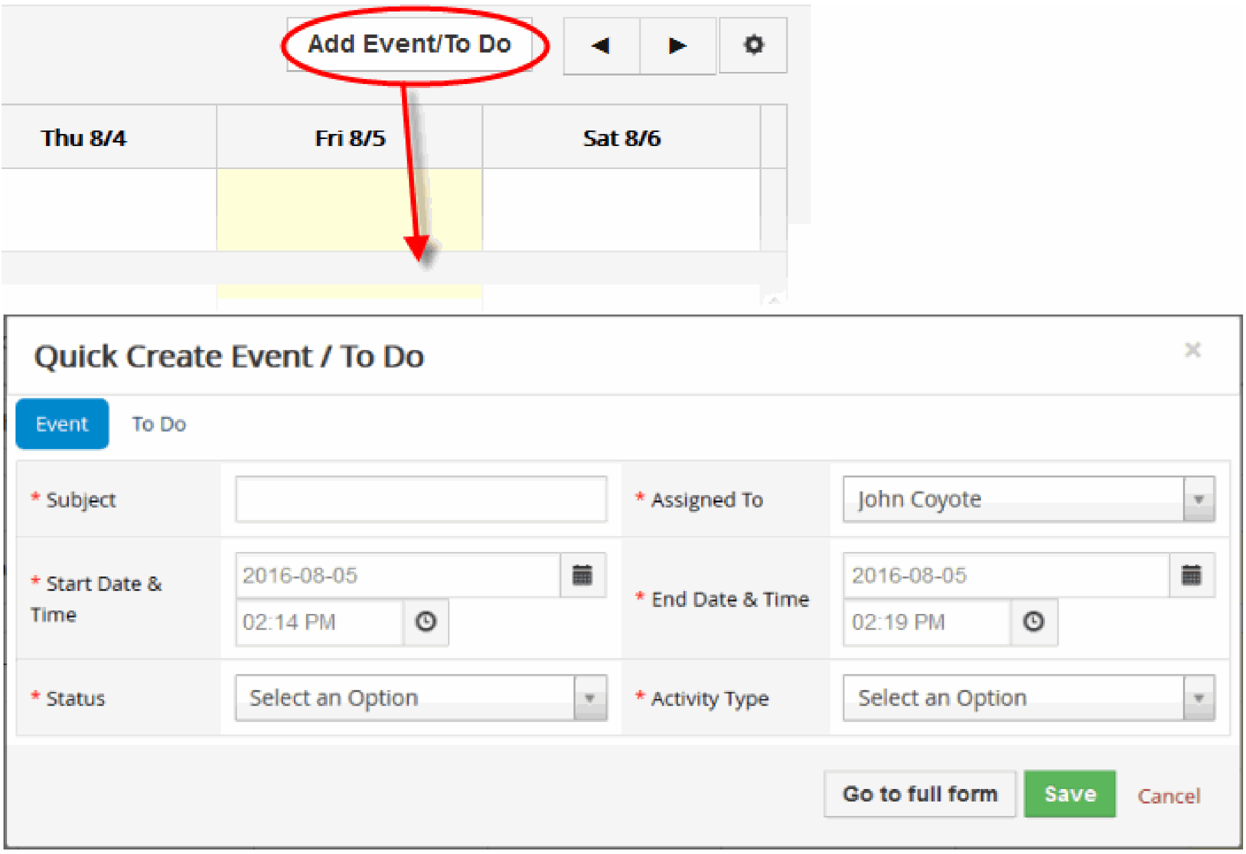
Description Details - Type a description details to the event

Invite (For Event record) - Specify a colleague as a part in the event. The email notification will be sent automatically

- Click 'Save' to add the appointment

In addition to the auto-populated activities, you can also quick create new activities in the CRM.

- Click the 'Calendar' tab
- Click the '+' icon, select 'Event / To Do' to quickly create an event/to do
- Fill in details in the fields and click 'Save'.



Create Custom Event Type

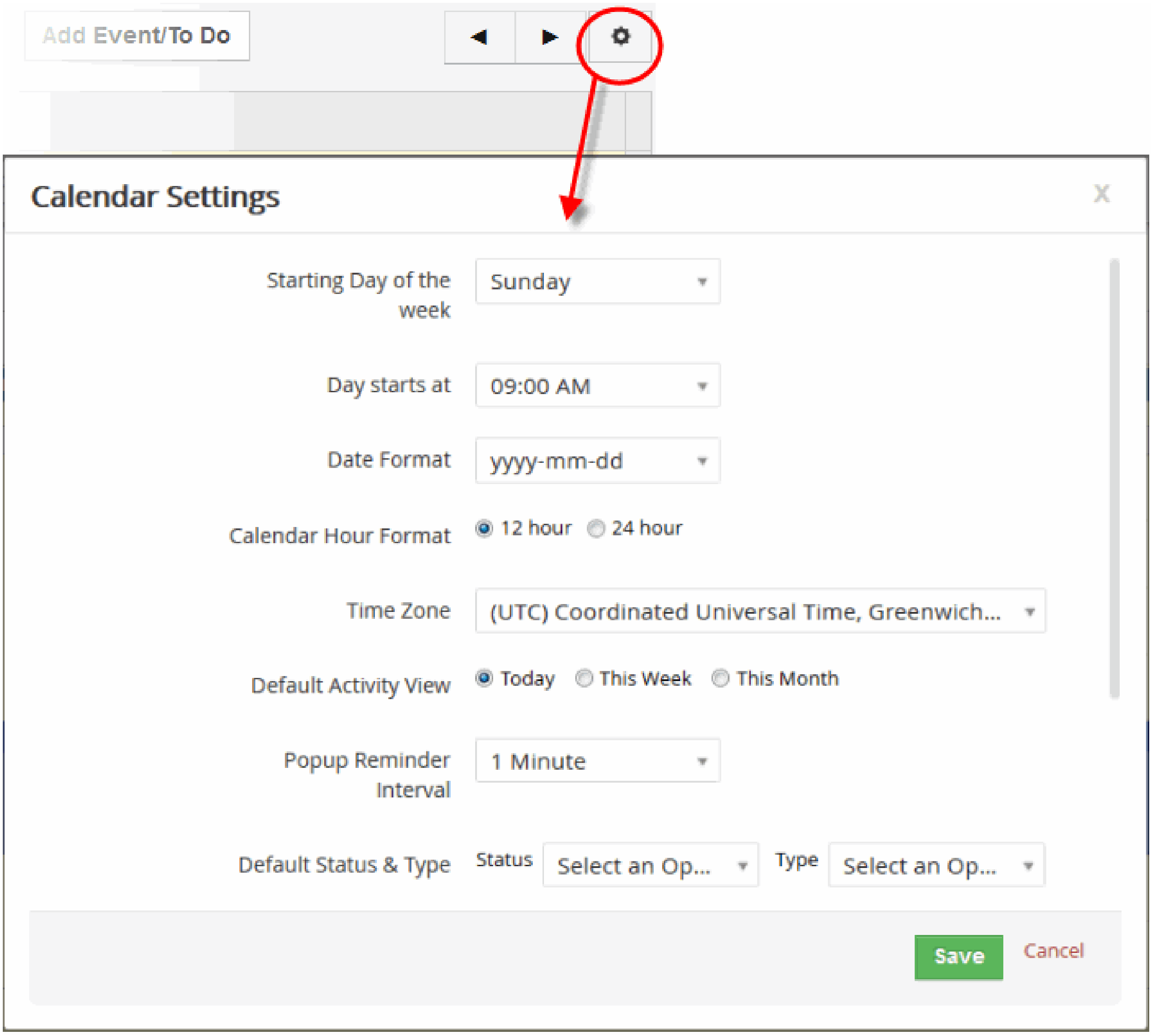
Event types such as call and meeting are provided by default along with CRM package. You can create custom event types to schedule events that meet your organization's or personal requirements. For example, Meetups, Hangouts, etc.

- Click the gear icon in the top right and select 'CRM Settings'
- Click the 'Studio' drop-down in the left and select 'Picklist Editor'
- Select 'Events' from the 'Select Module' drop-down
- Available values in Activity Type field are displayed under 'All Values' tab
- Click 'Add Value' to add a custom event type
- Provide a label to your custom event, select desired roles and click 'Save'
- Your custom event type will be available for selection in Activity Type field in create or edit view of events

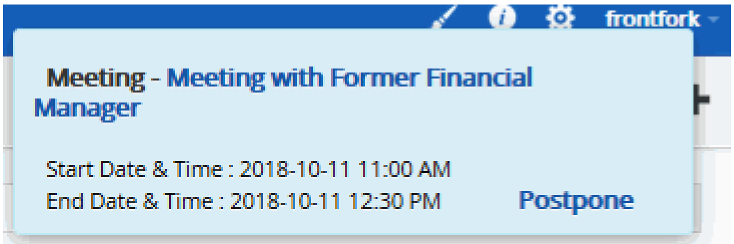
5.3.3. Manage Calendar Settings

The settings area lets you customize your calendar according to your preferences.

- Click the gear icon at top-right to open calendar settings:



- Starting Day of the week - Choose which day should be shown in column 1 of the calendar. In most cases this should be left at 'Sunday'
- Day starts at - Time when your working day starts
- Date Format - Choose the date notation.
- Calendar Hour Format - Choose whether appointment times are shown in 12 hour or 24 hour format
- Time Zone - Specify the time-zone used in the calendar.
- Default Activity View - Choose the default calendar view is displayed
- Popup Reminder Interval - Set the reminder interval before and after commencement of an event. If the events happen to occur continuously, repeated reminders can be set till the due date. There are two types of reminders will be sent from CRM before the event commencement:
  - Email notification will be sent to the owner of the event at the scheduled time
  - A popup message will be appeared on your CRM at the scheduled time. You can schedule the appearance of popup from 'Reminder Interval' field in 'My Preferences' page.



- Default Status & Type - Choose the status and activities type
- Default Event Duration - Select default event duration.
  - Available Call are: 5 minutes, 10 minutes, 30 minutes, 60 minutes,120 minutes.
  - Available other Events: 5 minutes, 10 minutes, 30 minutes, 60 minutes,120 minutes.
- Hide Completed Calendar Events - If selected, tasks will be removed from the calendar when finished.
- Calendar Sharing - Define who will see the calendar information. Share with only selected users, or completely hide all events from viewing by other users.
  - Private: No one can view your events
  - Public: Everyone can view your events
  - Selected Users: Only selected users can view your calendar

Note: When you share your calendar with Public or Selected Users, the events with visibility set as 'Private' will be displayed as Busy* for shared users.

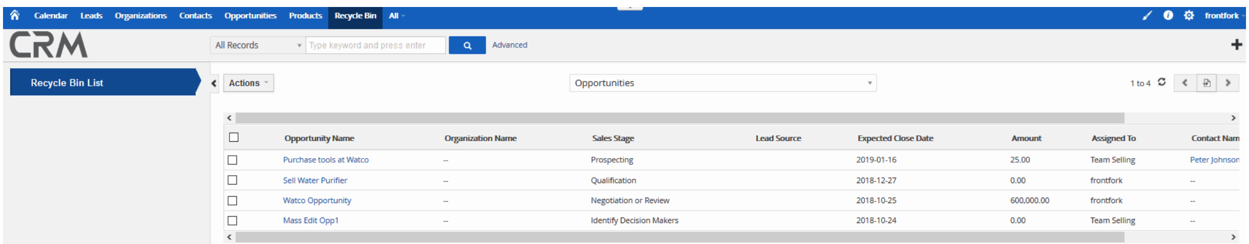
- Click 'Save' to add your activity to the Calendar
- Click 'Go to full form' to open details form of the 'Event/To Do' form

Note:
To create activities instantly, click on desired Calendar date, fill up details in pop up and click 'Save'.
You can also create events and to dos by clicking on 'Activities' in detail view of [Module] record. Eg. Contacts.

You can also configure calendar settings from 'My Preferences' interface.

5.4. Recycle Bin

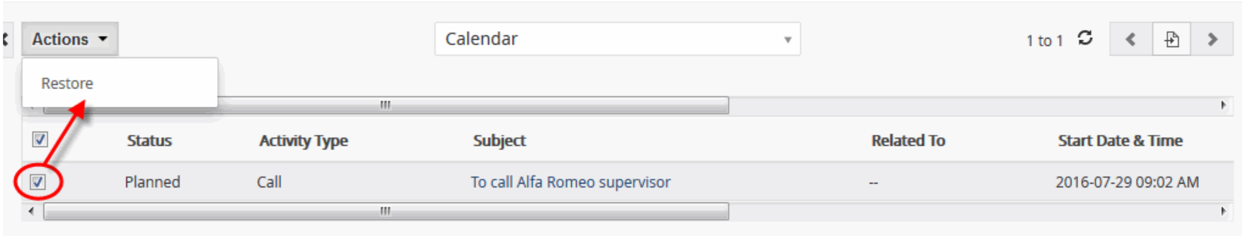
The recycle bin allows you to review and optionally restore deleted records back to their original location.



To restore a record

- Click 'All' > 'Recycle Bin'
- Select the records you wish to resurrect

- Click 'Actions' > 'Restore'



- Click 'Yes' to confirm your restore

To delete a record from the Recycle Bin

- Click 'All' > 'Recycle Bin'
- Place your mouse on the record you want to delete then click the trashcan icon on the right
- Click 'Yes' to confirm your removal

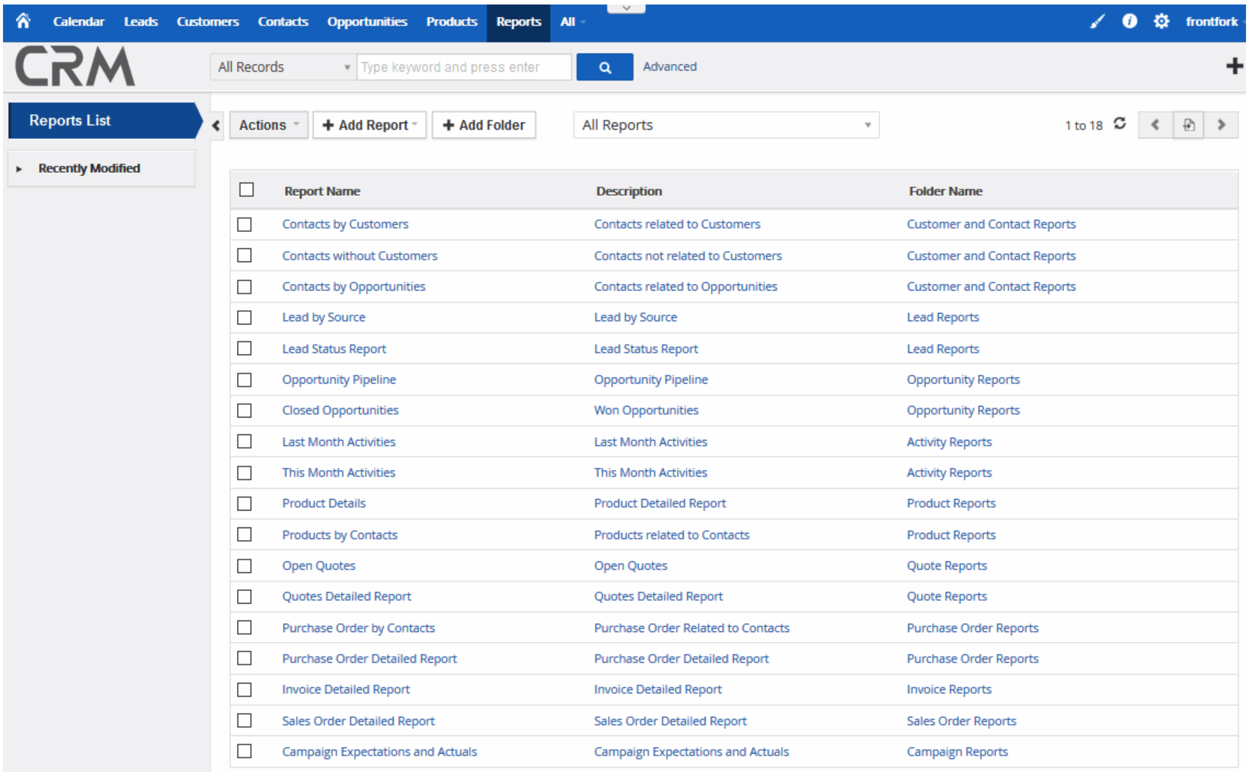
Note:

- If you delete an organization or contact record then any opportunities/quotes associated with them will also be deleted. You will need to restore both records to rebuild the relationship.
- Even if you delete an organization record, any contacts associated with it will **not** be deleted. However, the contact will be dissociated from the organization.

6. Analytics

The 'Reports' interface allows you to generate, view and manage reports on every aspect of CRM. Reports can be exported to .xls or to .csv.

- Click 'All' > 'Reports' to open the reports interface.

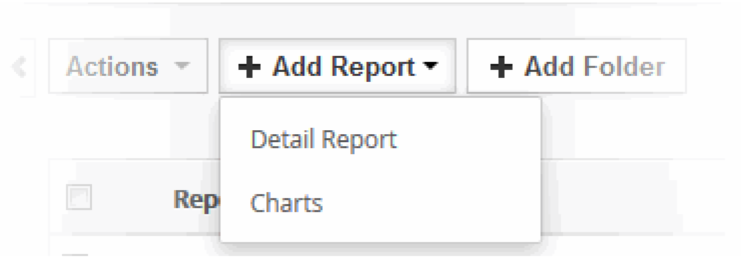


- Click '+ Report' > 'Detail Report' to create a new report
- You can create custom reports on any the following primary modules:
  - Assets | Calendar | Campaigns | Comments | Contacts | Emails | Invoice | Leads | Opportunities |
  - Organizations | Price Books | Products | Project Milestones | Project Tasks | Purchase Order | Quotes |
  - Sales Orders | Services | Vendors
- You can add up to 2 'related' modules to any report. You can incorporate columns (data) from any related modules to your report
- You can specify how detailed the report should be by choosing columns from each module. For numerical data, you can also choose the type of calculations you wish to see in the report - 'Sum', 'Average', Lowest Value', 'Highest Value', or all.
- You can create more targeted reports by adding conditional filters to any report item.
- You can schedule reports to be automatically generated at specific times.
- Individual reports are grouped into folders. The folder name should describe at least the primary module of the report. You can create new folders as required.

6.1.1. Generate a Report

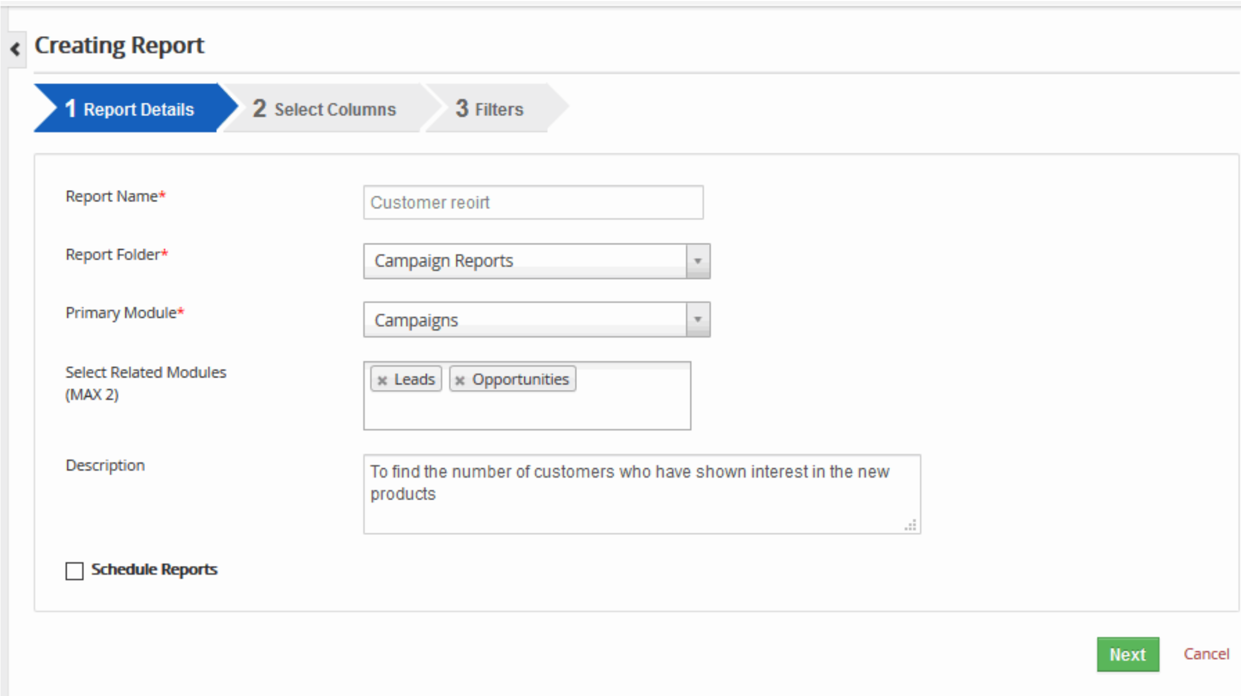
By default, all reports are stored in the 'All Reports' folder. You can also create custom report folders as required.

- Click 'All' > 'Reports'
- Click the 'Add Report' drop-down button. There are two available options:
  - **Detail Report** - Provides a customized view of client based activities
  - **Charts** - Allows you to create a custom chart

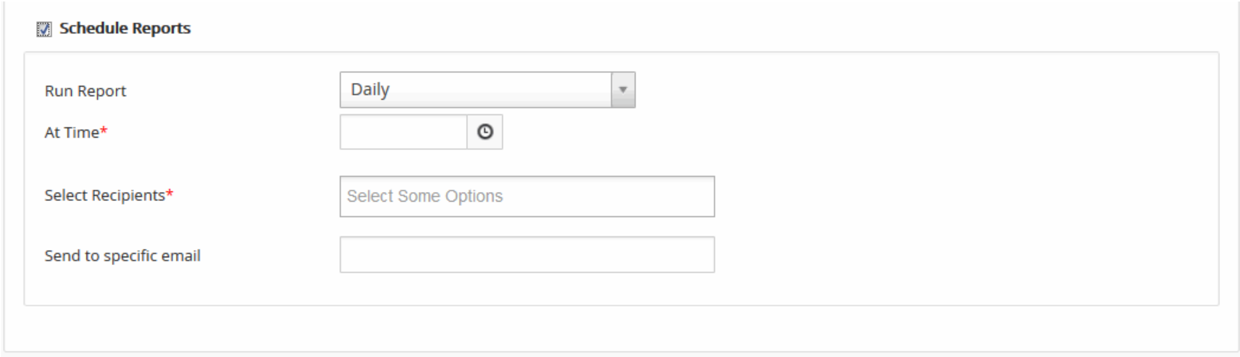


Report Details

- Click 'Detail Report' to open the first step of the report creation wizard:



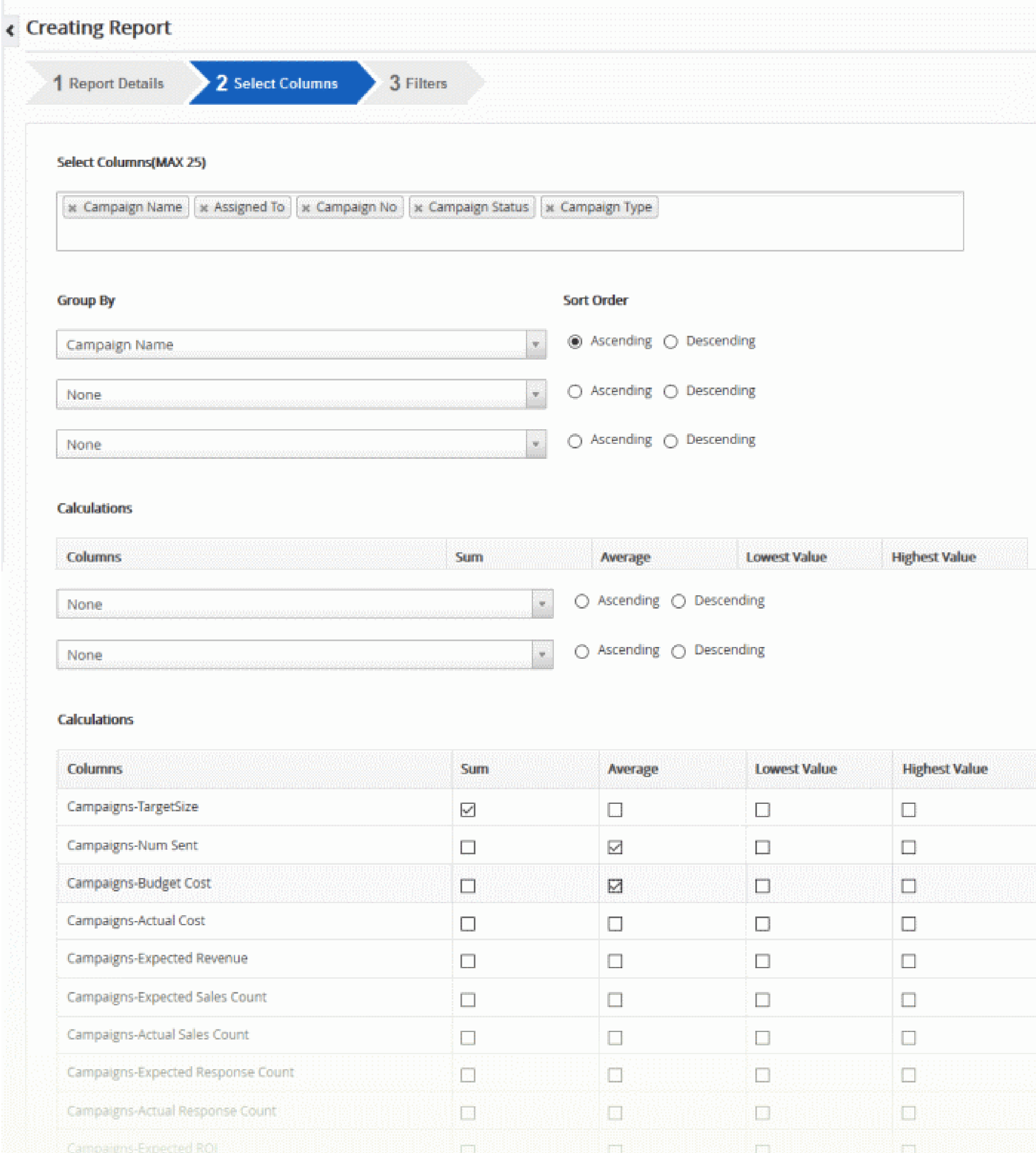
- Report Name - Please choose a name which accurately describes your report
- Report Folder - Select the folder in which to save your report. Ideally, the folder name will contain the name of the primary module for identification purposes. You can create a new folder by clicking the '+ Folder' button.
- Primary Module - Should be the module from which the bulk of your report data is drawn. You can choose how much or how little is included from the module in step 2, 'Columns'.
- Select Related Modules - Adding related modules lets you include data from those modules in your report. Again, you can choose which specific data is included in step 2, 'Columns'.
- 'Schedule Reports' - Order your report to be automatically generated at regular intervals. You can have reports sent to specific contacts or email addresses.



- Click 'Next' to continue to step 2

Select Columns

- The second step lets you choose which data is shown in your report from your primary and related modules.
- You choose the data by adding up to 25 columns (data items) from your modules.
- You can also group your data by column name and choose how numerical data is calculated



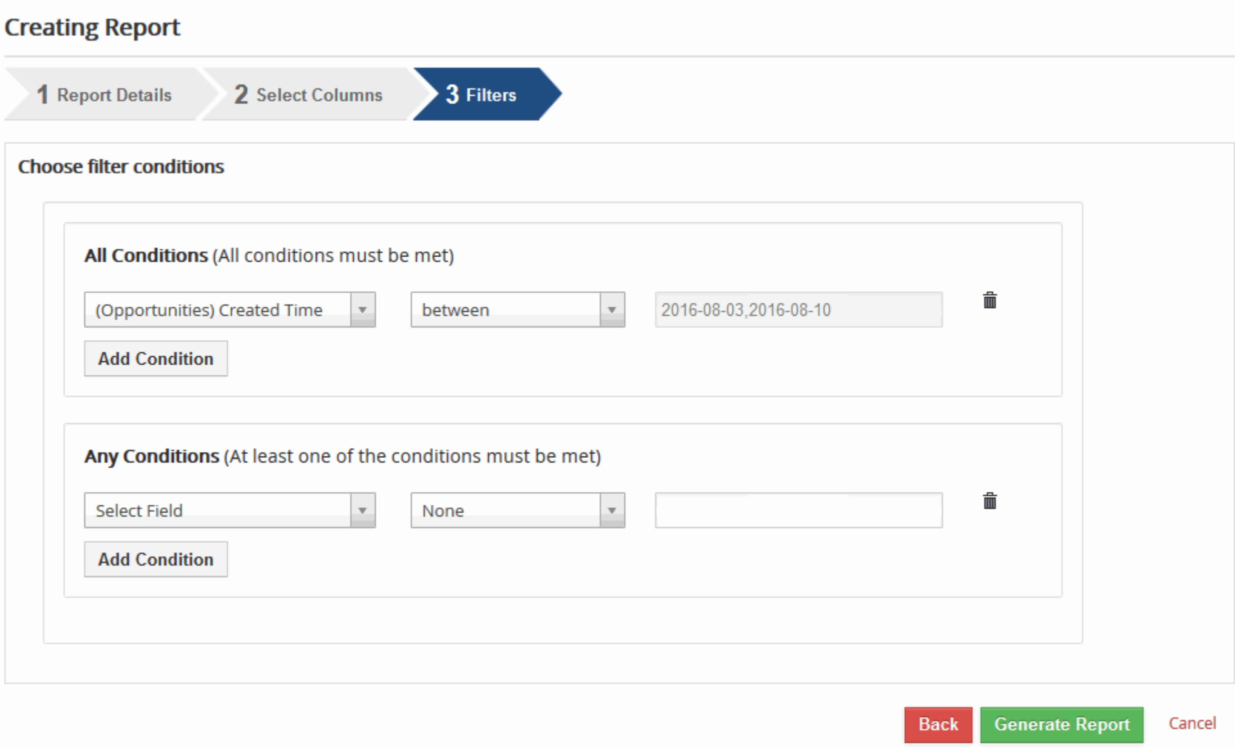
- **Select columns (Max 25) -** Select up to 25 data pieces to include in your report. Click in the field to begin adding columns.
- **Group By -** Sort data in ascending/descending order of a particular column.
- **Calculations -** Choose which calculations are shown for numerical data in your report. You can pick 'Sum'. 'Average', 'Lowest Value', 'Highest Value', or all types. The 'Calculations' section will only be available if the modules in your report contain numerical data.

- Click 'Next' to continue to step 3

Filters

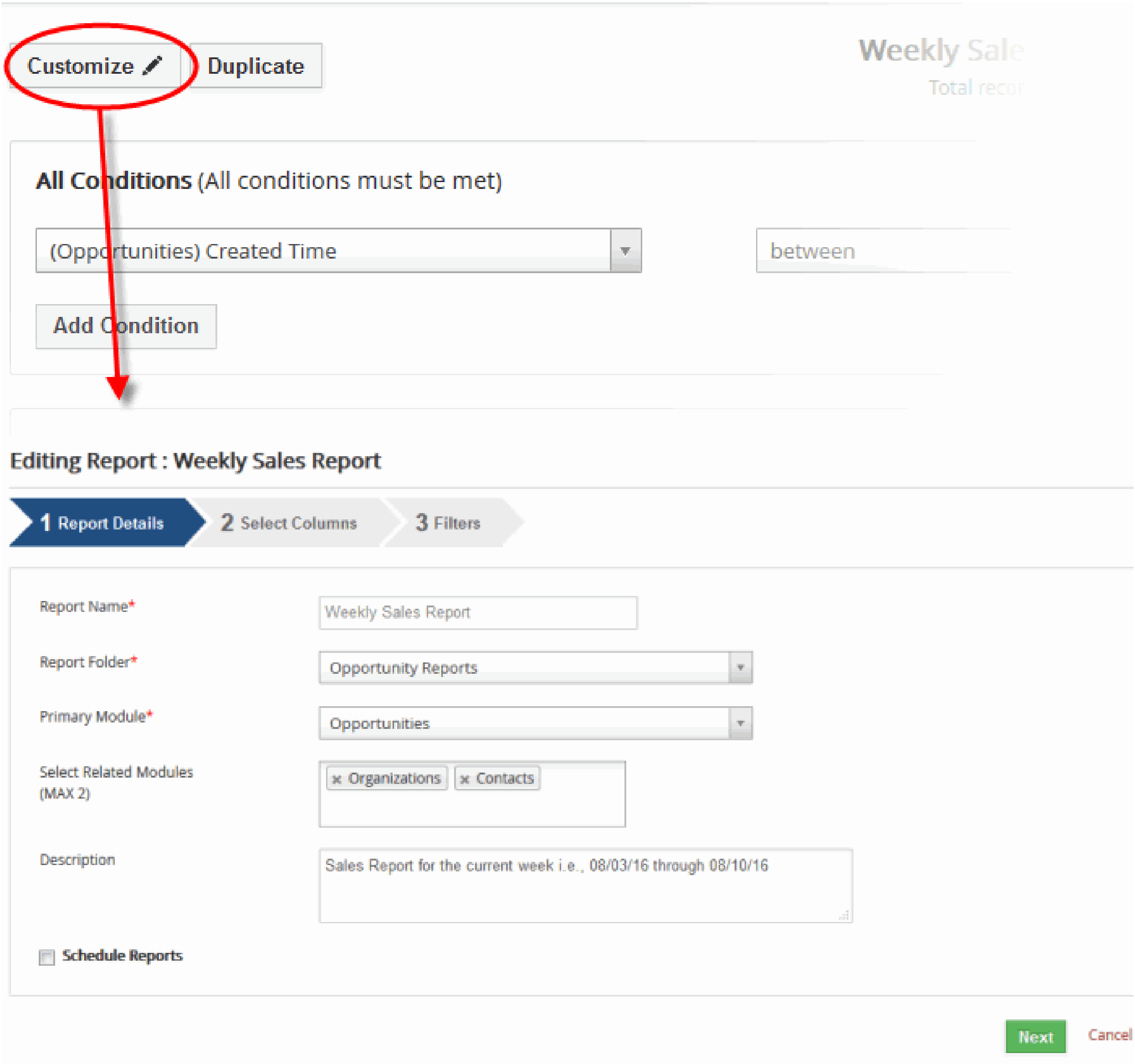
Records filtering conditions has been made very simple. Conditions are grouped into two blocks.

- Provide condition to filter selected records. You can skip this step if you wish to create report on all existing records in selected module.



- Click 'Generate Report' button. The detail view of the report will be displayed.
- To edit existing report, place your mouse on the report name and click the 'pencil' icon and then generate the report by clicking 'Generate Report'.

  OR
- Click on 'Customize' button in the detail view of the report.



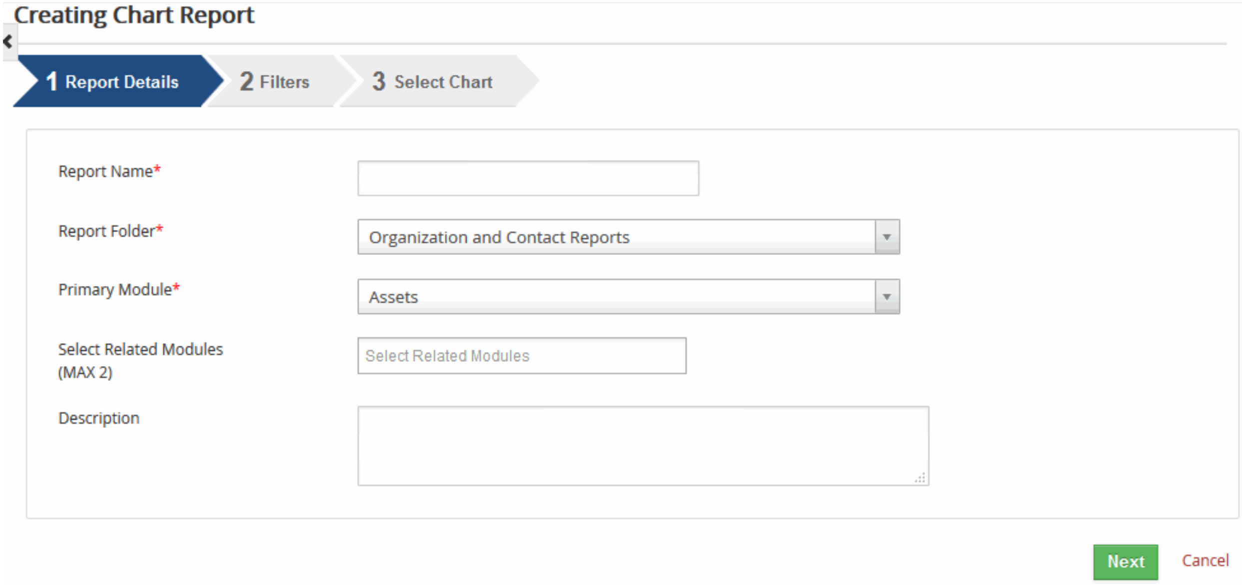
A stepped report will be displayed.

Charts

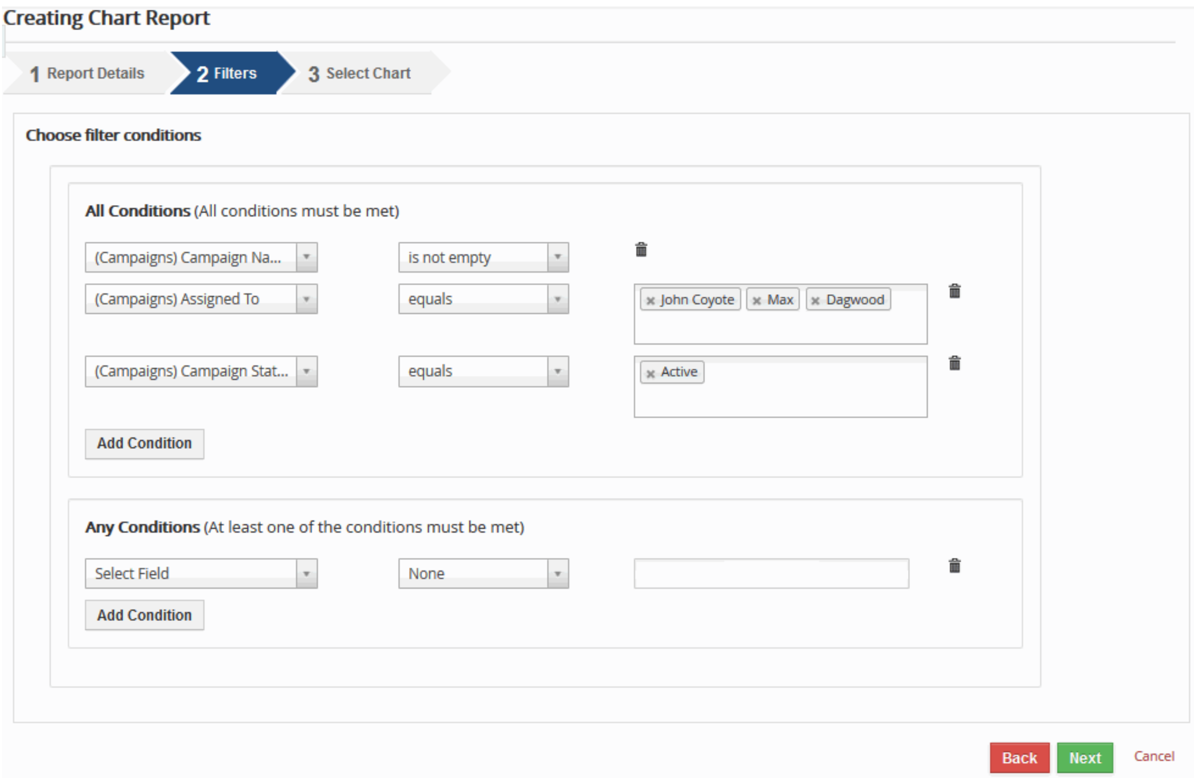
To create a custom chart,

- Click 'All' > 'Reports'
- In the 'Add Report' drop-down select the 'Charts'

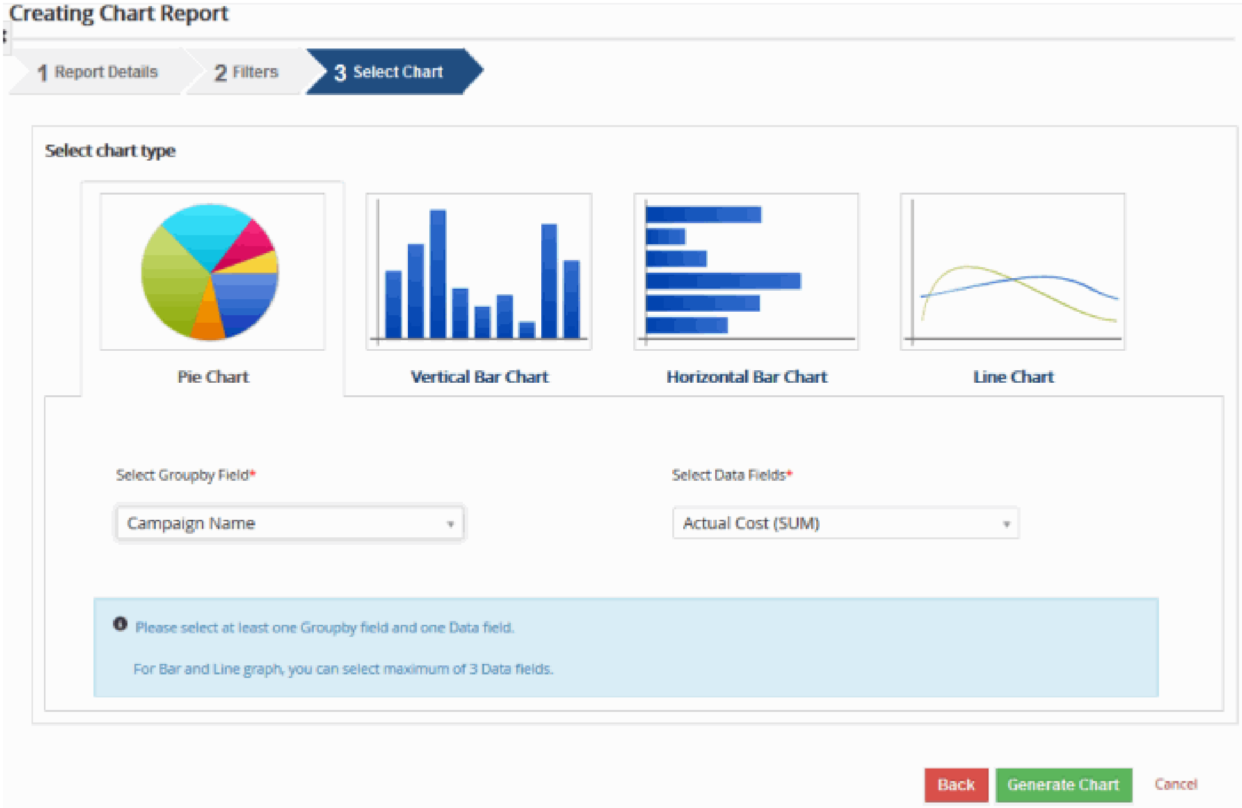
The 'Creating Chart Report' page will be displayed.



- Step 1 - Give a name to the chart, and select the primary module (& related modules if required).
- Step 2 - Choose conditions to select data that needs to be plotted in a chart.

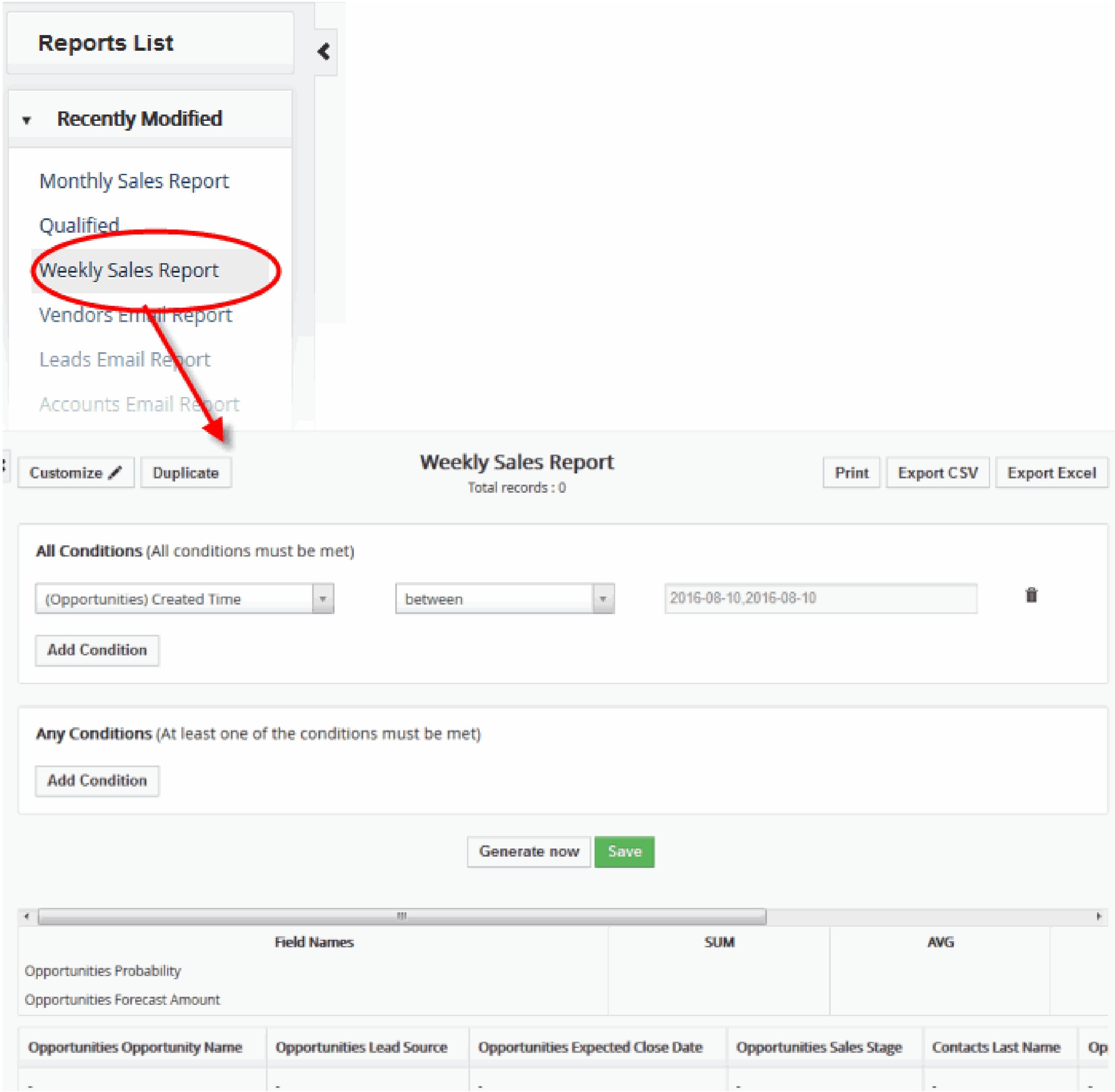


- Step 3 - Select the way the chart will be displayed.: Pie chart, Vertical bar chart, Horizontal bar charts or Line chat.
- Select Grouping field for X-Axis, and Data to be plotted on Y Axis (upto 3 data fields can be plotted on a line/bar chart).

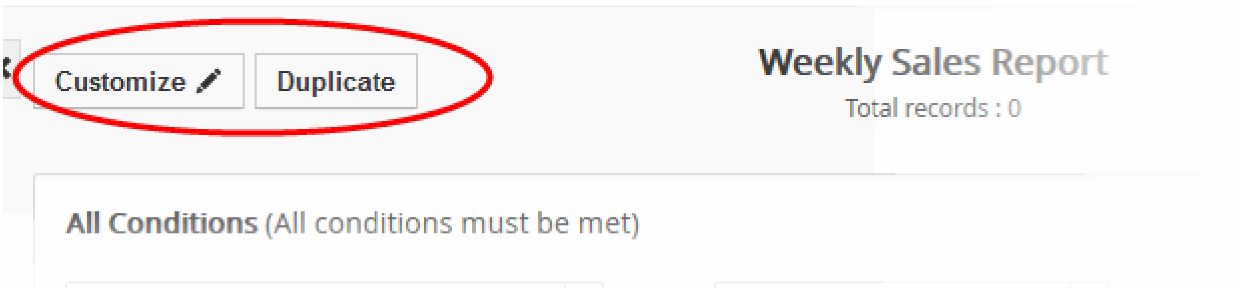


- Click 'Generate Chart'

To view the details of the report click on the report name.



You can customize the standard report as per your requirements by clicking the 'Customize' button in the report page. Once customized, you cannot revert to the default report.

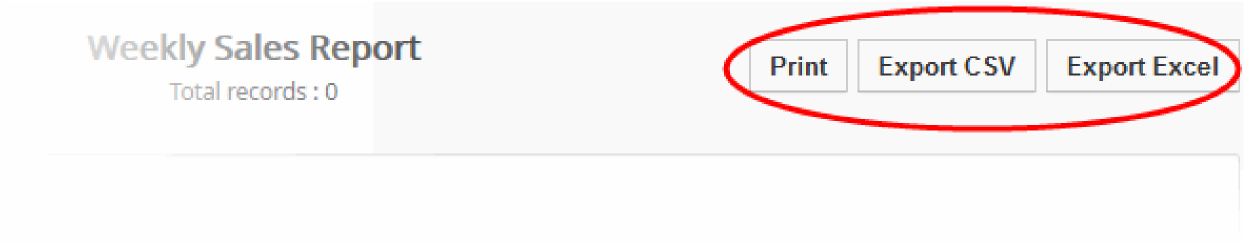


You can use the existing report as a template to create a new report by clicking the 'Duplicate' button.

Export a report

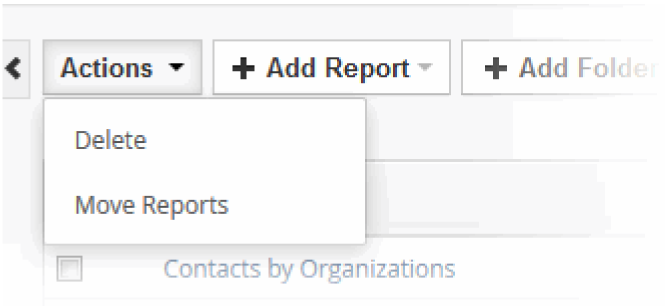
This feature allows you to export your reports to .csv or .xlsx files. You will need to click on a corresponding button in the detail view of the record to export it. You can also print your reports by clicking on a print button in the detail view of the report.

Reports allows Export CSV, Export Excel option if the User have permission to export the records for Reports and the Primary module selected in the report.



6.1.2. Manage Reports

CRM allows you to perform additional operations on the selected reports such as delete, move report to a folder and so on.



To delete a report

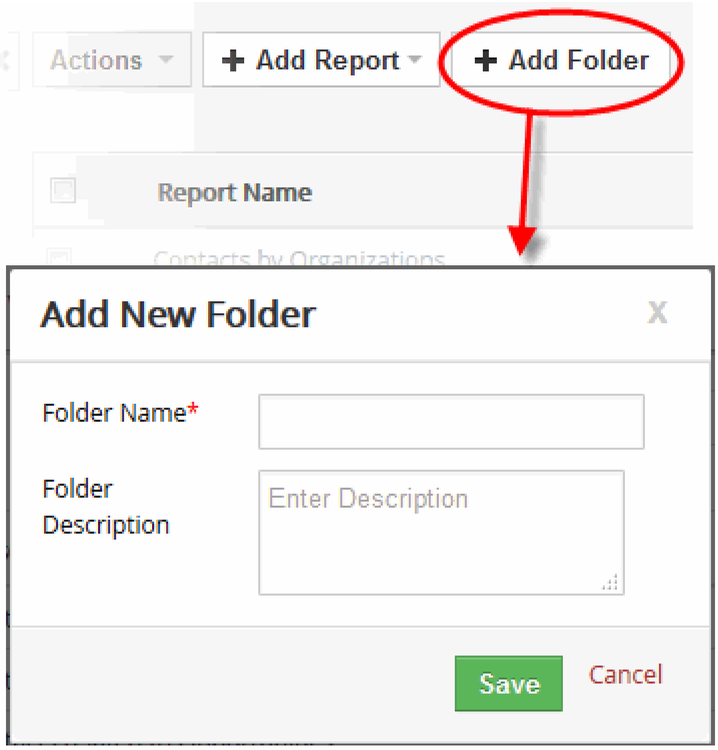
- Select the report you want to remove
- Select 'Delete' > 'Actions'

  OR
- Place your mouse cursor on the report and click the 'Delete' icon beside it

Adding a new Folder

By default, reports are stored in different categories. You can create folders to store the frequently used reports in a common folder for easy access.

- Click 'All' > 'Reports'
- Click 'Add Folder'.



- Enter the folder name and the folder description.
- Click 'Save'

To move a report

It is a good practice to keep your reports in folders that reflects their function and audience.

To do that,

- Select a report you want to move
- Select the folder and click 'Save' in the 'Move Reports' dialog

To edit a report

- Select a report to edit and change data the save your changes

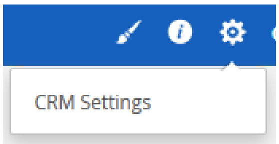
  OR
- Select the report and place your mouse cursor on the report name
- Click the 'Edit' icon

You will be prompted to go through steps to edit the report.

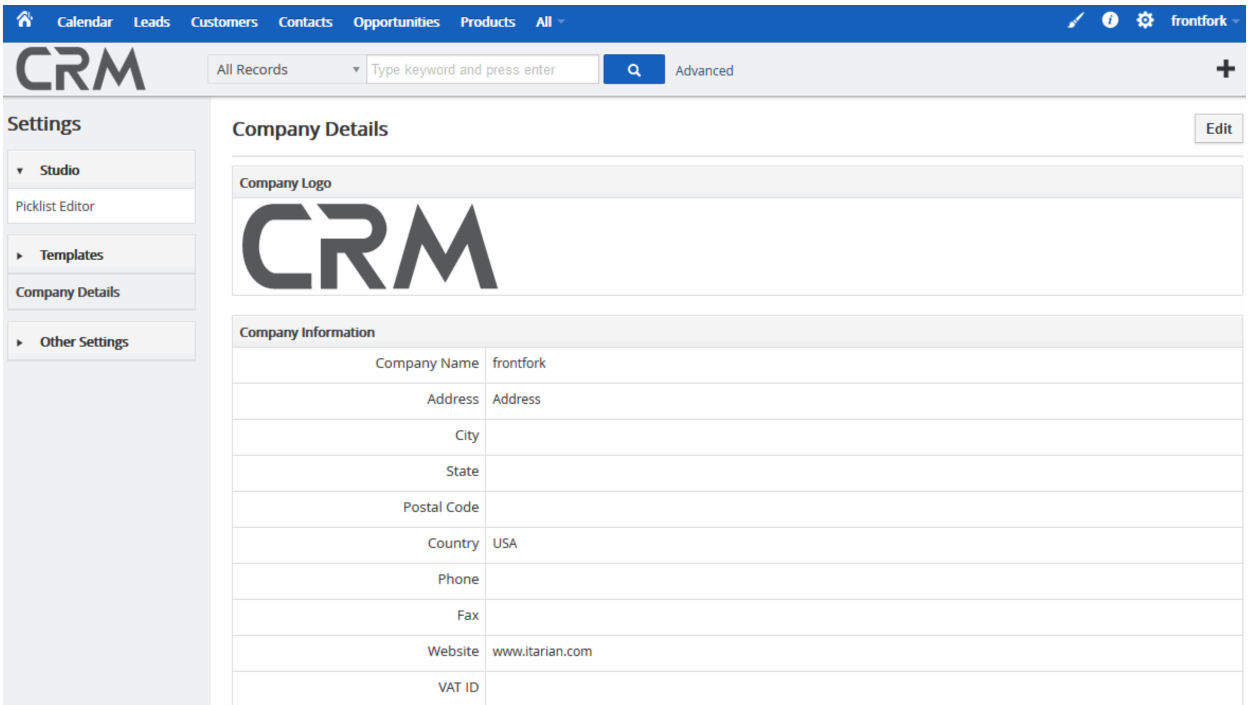
- To clone the current Report record, select the report and click 'Duplicate' button
- Change a name of the report, go through the required steps and click 'Generate Report'

7.Configure CRM Settings

- Click the cog icon at the top-right of the interface to access CRM settings:



- **Studio** - Picklist Editor.
  - Allows you to modify which values are shown in drop-down menus when creating or editing a record in various modules.
  - By default, CRM will show all relevant records in the drop-down menus. The picklist editor lets you customize these menus to your requirements. You can add new values, rearrange the order of values, assign values, rename values and delete values.
  - For example, if you choose the 'Products' module, you can choose the contents of the 'Manufacturer', 'Product Category', 'Vendor Name' and 'GL Account' drop-down menus.
  - You can also create custom drop-down menus for specific roles. For example, you may want 'Account Admins' to see all available values in a drop-down when creating a new record, while 'Agents' are only shown a limited selection.
- **Templates** - You can customize the application by uploading your company logo and details. The logo will appear on the CRM home page. Your logo and address will also feature in email templates, quotes, invoices and other customer facing items.
- Other settings
  - You can add your outgoing mail server so you can send mails directly from the CRM
  - You can upload a standard terms and conditions for your products.
  - You can specify which currencies should be available in the CRM
  - You can add new taxes and specify tax rates



The following sections explain more about each of the settings:

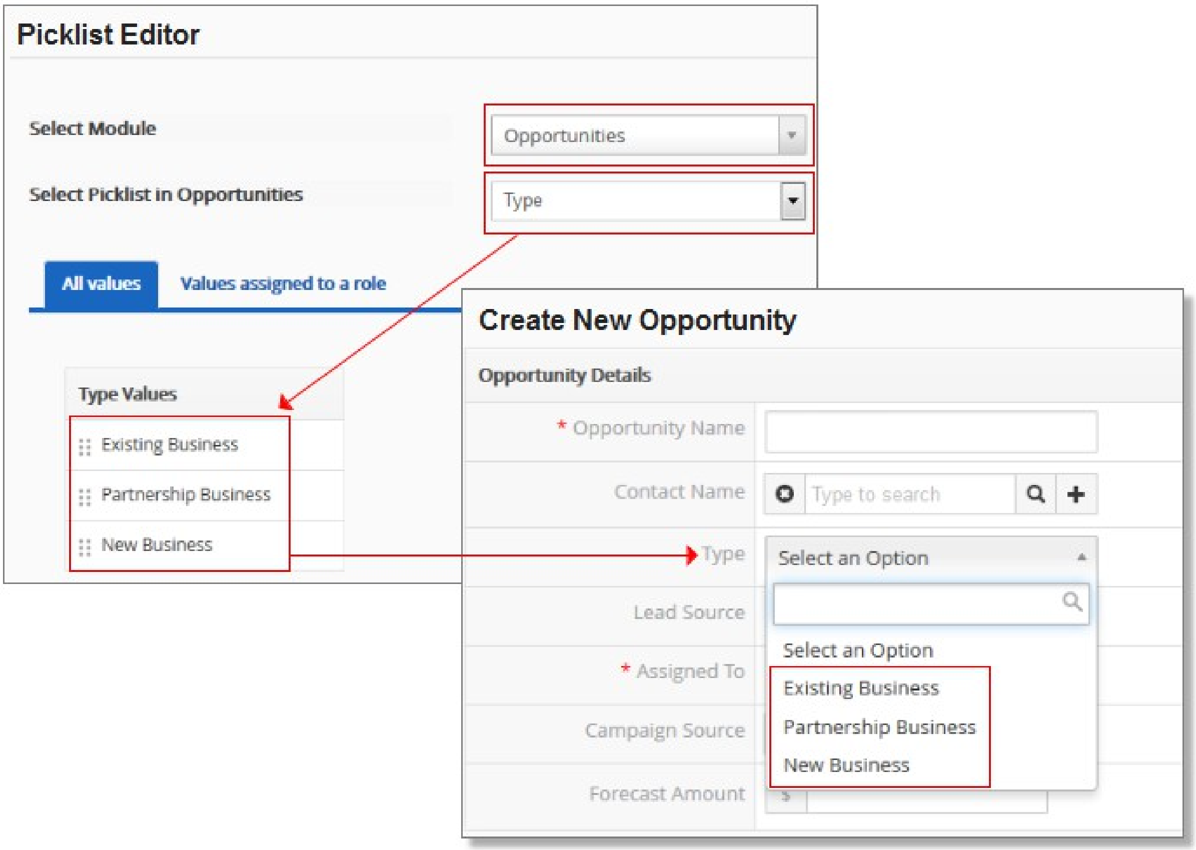
- Configure the Picklist Editor
- Manage Company Details
- Configure Miscellaneous Settings

7.1. Configure the Picklist Editor

- Click the cog icon at the top right of the interface to open CRM settings.
- Click 'Studio' on the left then 'Picklist Editor'

A picklist is a drop-down menu from which you can make a selection. The picklist editor lets you modify the contents of the drop-down menus shown when creating or editing a record.

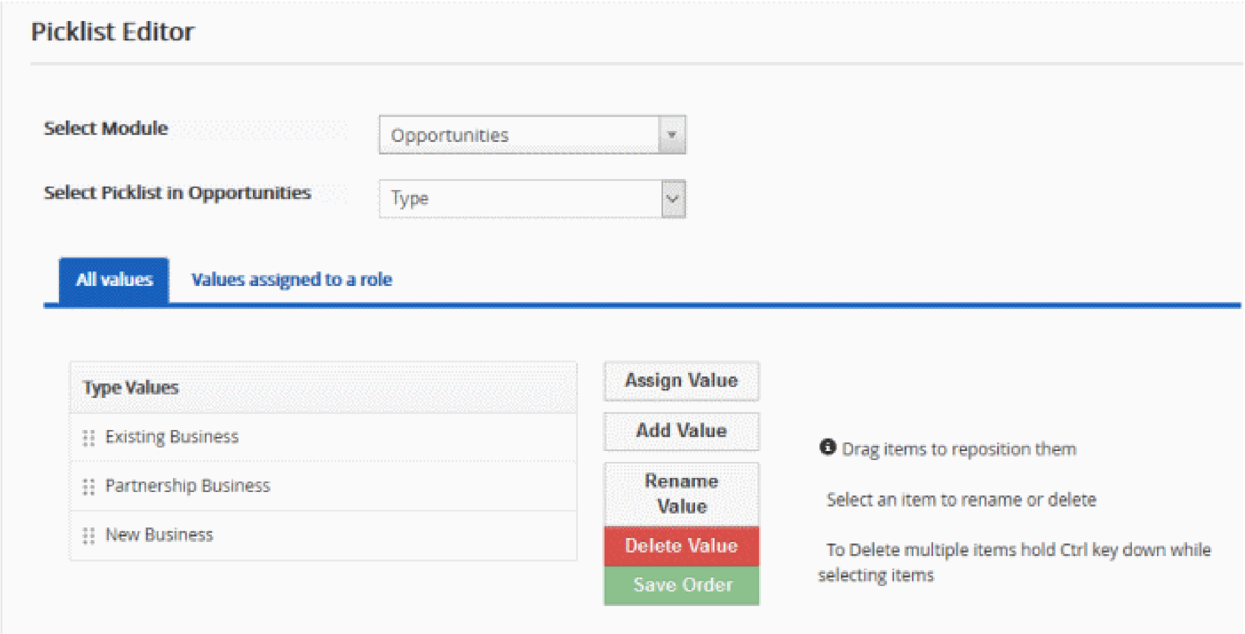
- The example below shows the picklist editor for the 'Type' drop-down shown in the new/edit 'Opportunity' page:



- You can add new values, rearrange the order of values, assign values, rename values and delete values.
- 'Values assigned to a role' lets you create custom drop-down menus for specific roles. For example, you may want 'Account Admins; to see all values in a drop-down, while 'Agents' are shown a limited selection.

To create a custom picklist:

- Click the cog icon at the top right of the interface to open CRM settings.
- Click 'Studio' on the left then 'Picklist Editor'
- 'Select Module' - Choose the module whose drop-down menus you wish to work on.
- 'Select Picklist' - Choose the specific drop-down menu you want to modify.



You can add / assign / rename values to the drop down menu and assign the selected values to a particular role:

- All values
- Values assigned to a role

The 'All values' tab lets you modify drop-down menus shown to all users/role types. You can perform the following actions:

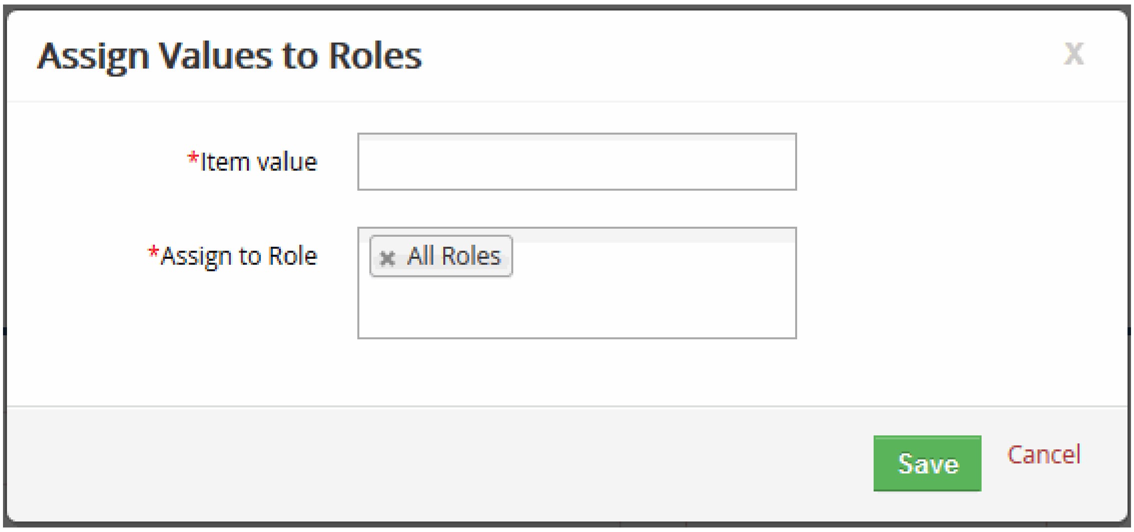
- Assign a value
- Add a value
- Rename a value
- Delete a value
- Save an order

Assign Value

Enables you to assign multiple picklist values to multiple roles in one shot. When you assign values to a role, all users under that role will be able to access the picklist values.

To assign values to role(s)

- Select a module and desired picklist field
- Select desired picklist values you wish to assign to selected role(s). To select multiple values, press and hold Ctrl key (Command key in Mac) and click on desired picklist values
- Select role(s) from 'Assign to Role' drop-down to grant them access to selected values



- Click 'Save' for your settings to take affect

To add new picklist values

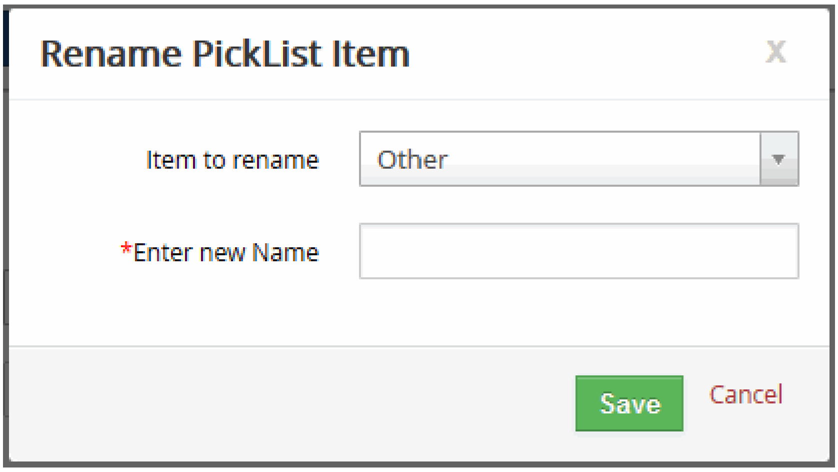
- Add a module and the picklist in module
- Click the 'All values' tab
- Click 'Add Value' to add a custom picklist value

- Enter a name in the 'Item value' and a role(s) form the 'Assign to Role' drop-down to grant them access to new picklist value
- Click 'Save'

Edit existing values

You can edit existing picklist values in the selected picklist field.

- Select a module and desired picklist field
- Select desired picklist value you wish to edit
- Click 'Rename Value'

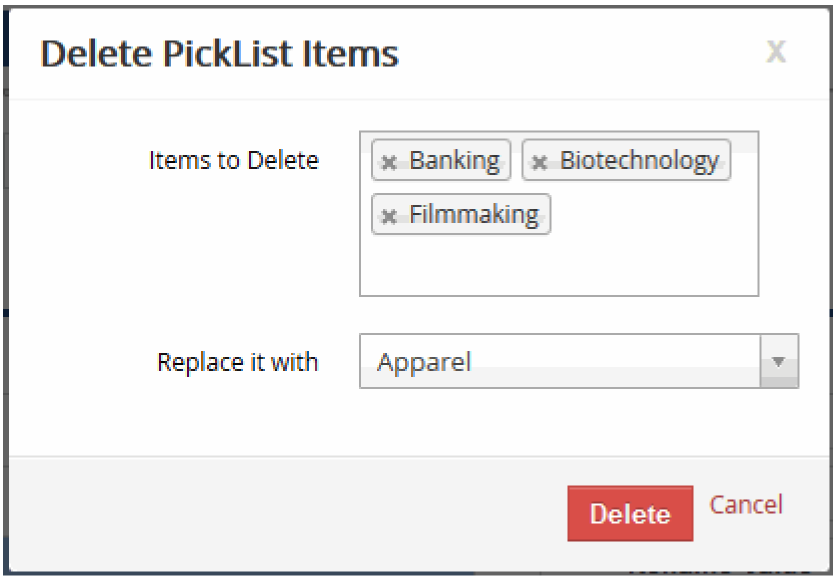


- Enter the new name in the 'Enter new Name' drop-down
- Click 'Save'

Delete existing values

You can delete existing picklist values in the selected picklist field. It also helps you select multiple values and delete them all at once.

- Select a module and desired picklist field
- Select desired picklist values you wish to delete. To select multiple values, press and hold Ctrl key and click on picklist values that needs to be deleted
- Click the 'Delete Value' to delete selected values
- Select a value in 'Replace it with' field to transfer responsibilities. The selected field will show up in place of deleted value(s).



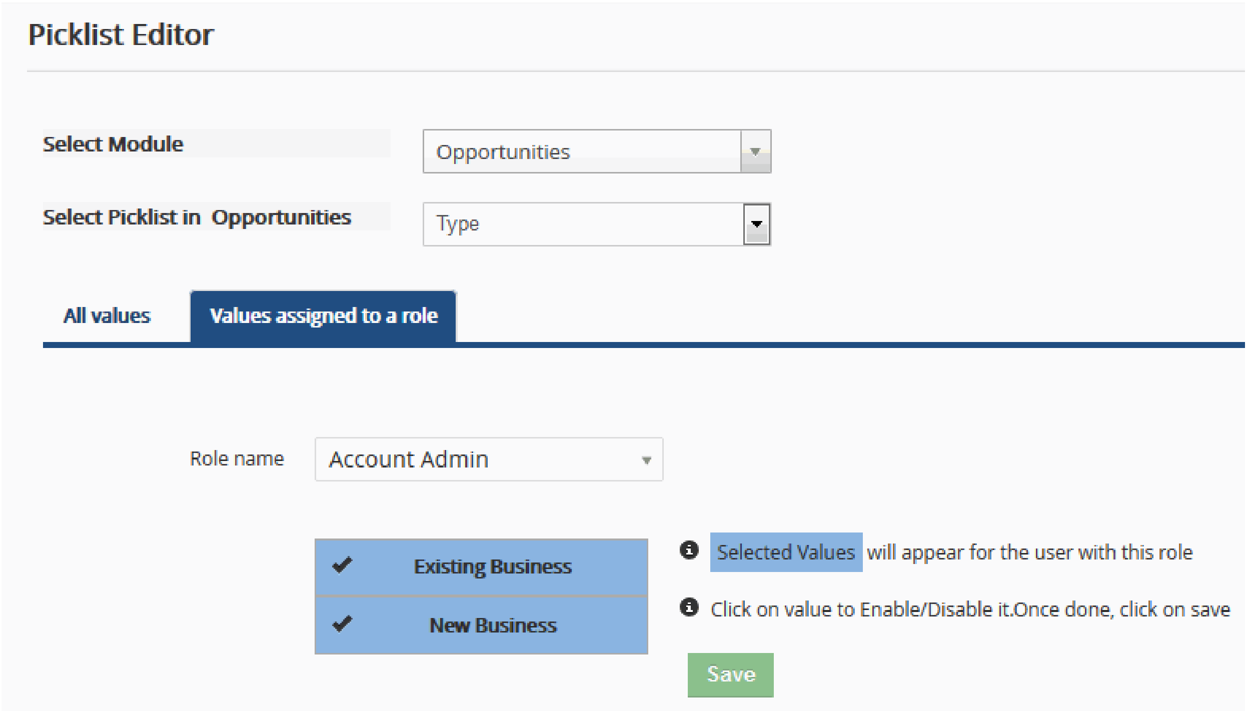
- Click 'Save'

Values assigned to a role

The 'Values assigned to a role' area lets you modify the contents of drop-down menus based on role. For example, you may wish to show a different set of options to an administrator than you would to an agent.

- Values in blue are enabled for the role selected in the 'Role name' field.

- Click on any value(s) to disable it. Values in white are disabled for the selected role.
- Click 'Save' to apply your choice. You must click 'Save' before switching to another role in order to register your choice.

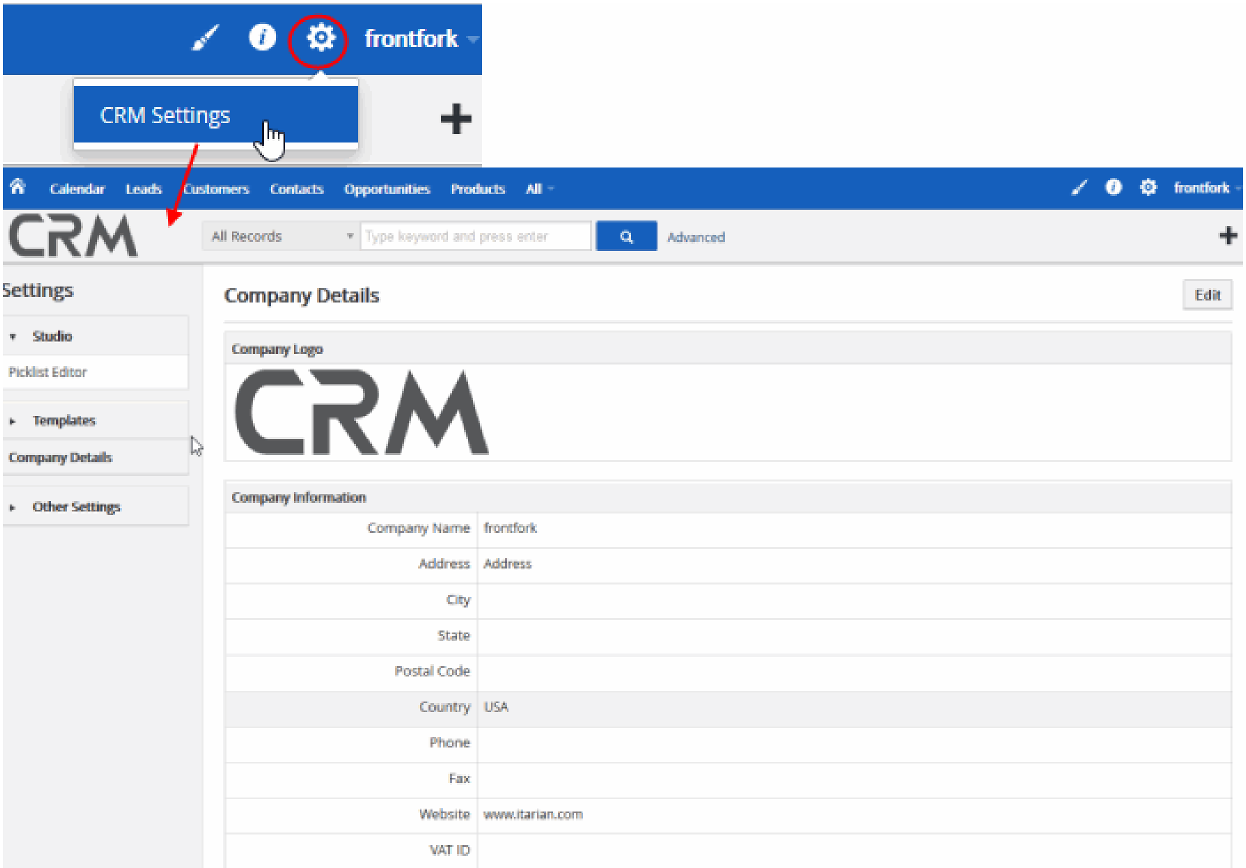


7.2. Manage Company Details

The company details section lets you personalize the CRM with your company logo and company information. These items are used to personalize invoices, quotes, sales orders and purchase orders.

To enter your company details in CRM:

- Click the cog icon at the top-right of the interface and select 'CRM Settings'
- Click 'Templates' > 'Company Details' in the left menu
- Click the 'Edit' button in the top-right corner:



- Click 'Browse...' to upload your company logo. Recommended size = 170px W x 60px H
- Complete your company name, address, contact and website details.
- Click 'Save' to register the new settings.

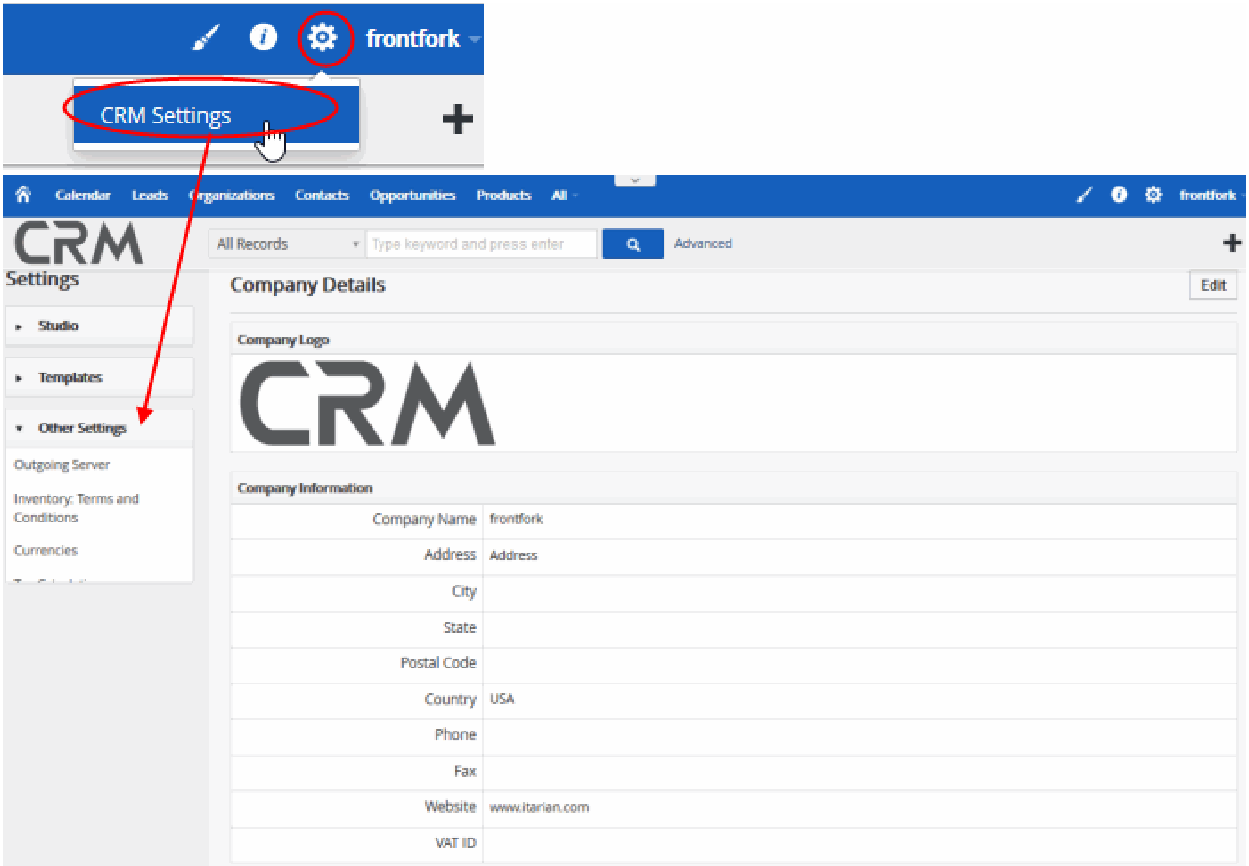
7.3. Configure Miscellaneous Settings

The 'Other Settings' area allows you to configure the following items:

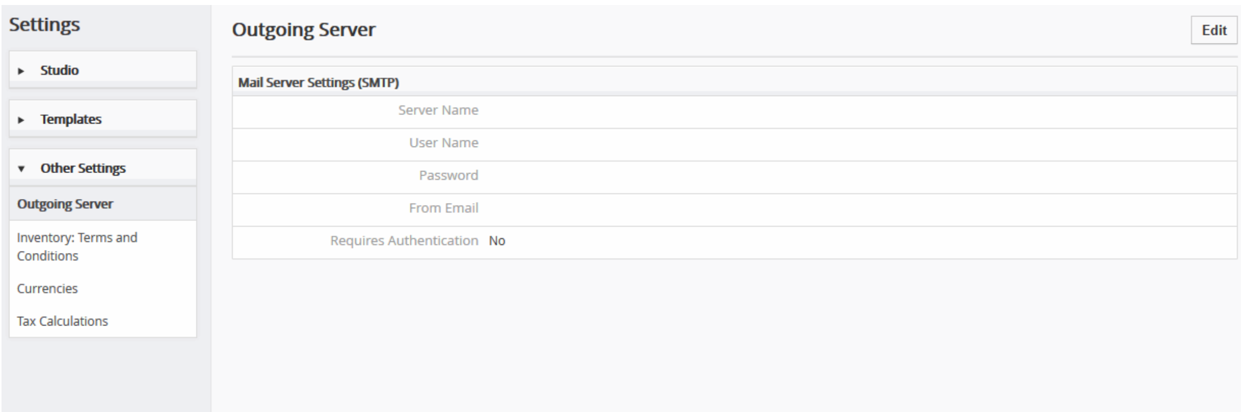
- **Outgoing Email Server Settings**
- **Editing Terms and Conditions**
- **Managing Currencies**
- **Managing Tax Calculations**

7.3.1. Outgoing Email Server Settings

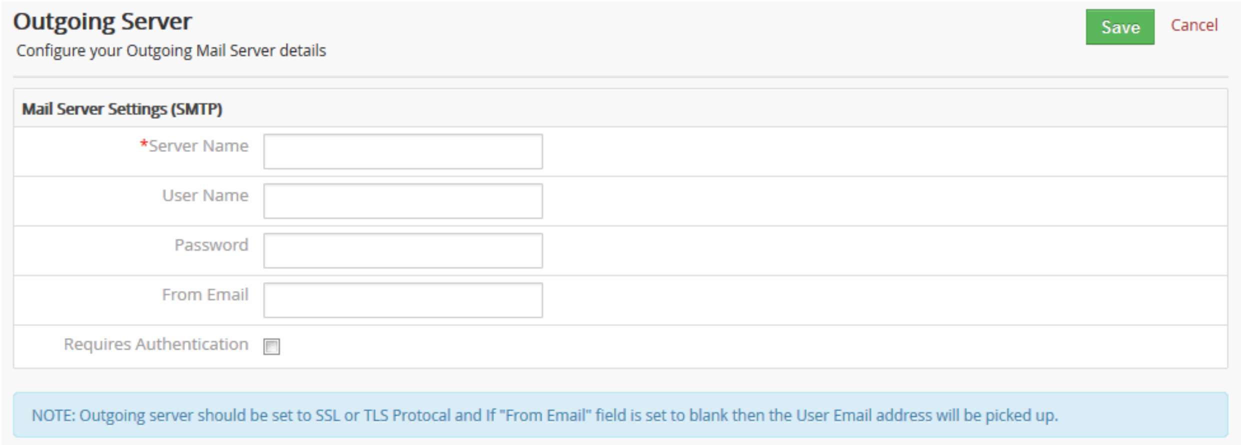
- Click the cog icon at top-right then click 'CRM Settings'
- Click the 'Other Settings' then 'Outgoing Server'



- The default Outgoing Server setting interface will open



- To modify, click the 'Edit' button in the top right



  - Server Name - Enter the hostname and port of your mail-server. For example, *mail.yourdomain.com:465*
  - User Name - Enter your mail server user name
  - Password - Enter your mail server password
  - From Email - Enter the email address from which mails will be sent.
  - Requires Authentication - Enable if your outgoing server requires clients to identify themselves to prove they have permission to send mail through the server
- Click 'Save' to save your configuration

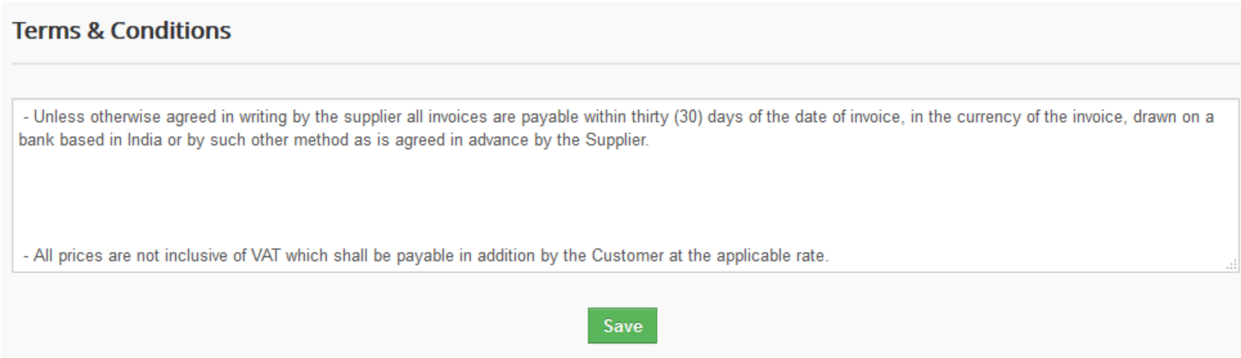
Tip:

- By default, the CRM is configured to use Comodo's server for outgoing mail. We recommend you replace this with your own server SMTP settings.
- If you prefer to keep Comodo's server, we recommend you configure your domain's SPF record to include the Comodo server as a valid sender for your domain.

7.3.2. Edit Terms and Conditions

CRM allows you to define product terms and conditions that will be automatically populated in modules such as invoices, sales orders, purchase orders and quotes.

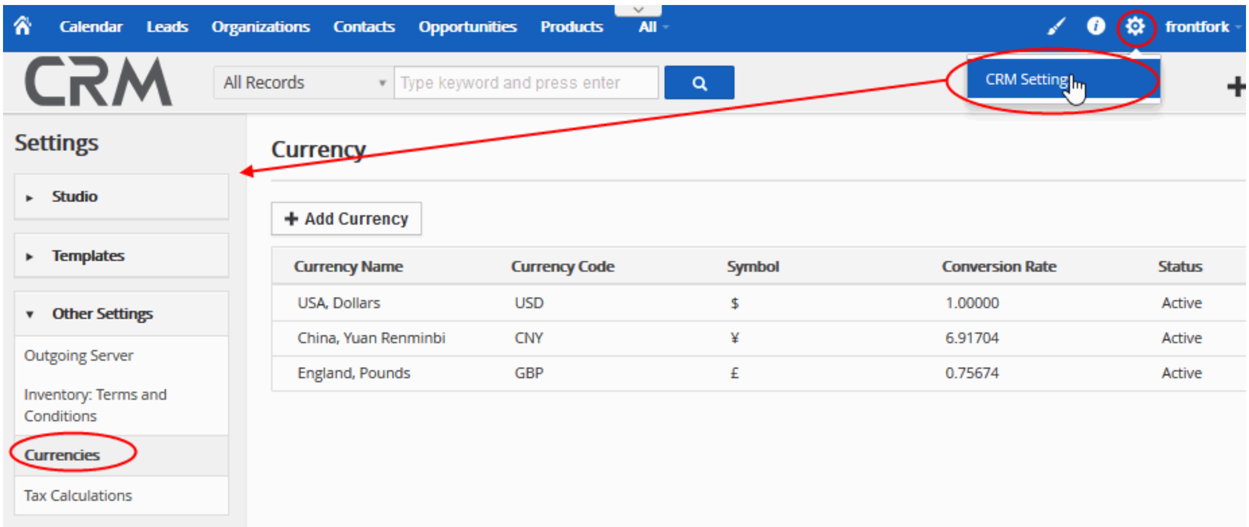
- Click the cog icon at the top-right and click 'CRM Settings'
- Click 'Other Settings' > 'Inventory: Terms and Conditions'
- You can copy and paste your terms and conditions into the large text field. Alternatively, you can directly type in the text field
- Click 'Save' to apply your changes.



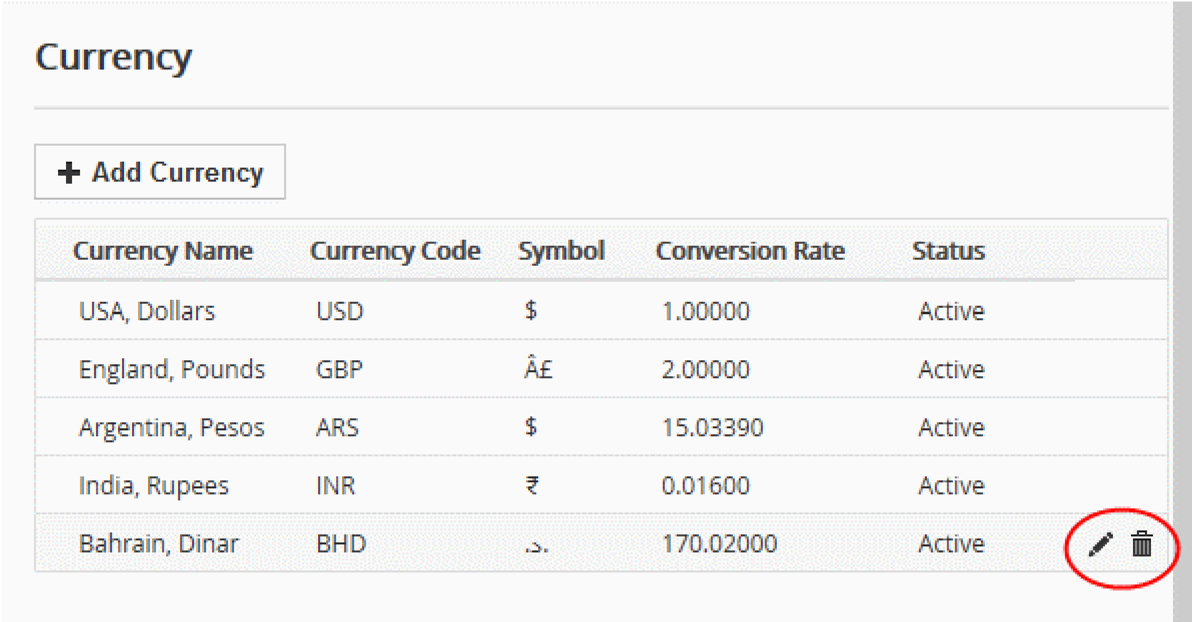
7.3.3. Manage Currencies

The 'Currencies' area lets you review, add and remove currencies from the CRM. The currencies listed on this page will be available for selection in numerous modules, including products, price books, quotes, invoices, sales orders and purchase orders.

- Click the cog icon at the top-right and click 'CRM Settings'
- Click 'Other Settings' > 'Currencies'



- To add more currencies to the list, click 'Add Currency' on top
  - Currency Name - Select desired currency from the drop-down
  - Currency Code - The currency code of the selected currency will be populated
  - Symbol - The symbol of selected currency will be populated
  - Conversion Rate - Provide conversion rate of the selected currency in accordance with your base currency. For instance, 1 USD = 64.13 INR
  - Status - If enabled, currency is activated (All fields are mandatory).
- Click 'Save'
- To edit the currency from the list, place your cursor on the currency row and click the edit icon besides it



Currency

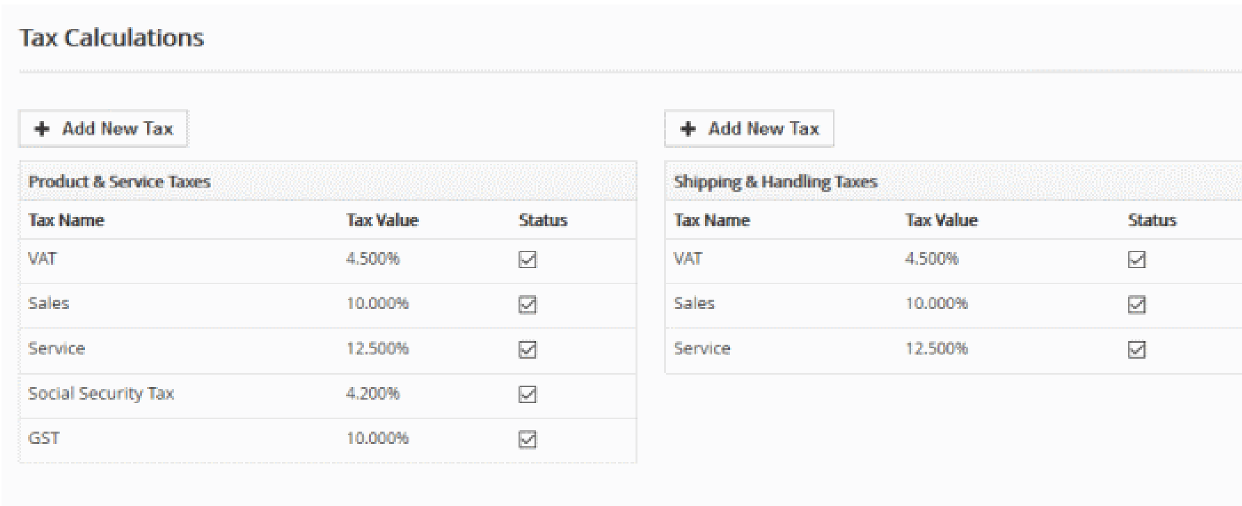
+ Add Currency

Currency Name	Currency Code	Symbol	Conversion Rate	Status
USA, Dollars	USD	$	1.00000	Active
England, Pounds	GBP	Â£	2.00000	Active
Argentina, Pesos	ARS	$	15.03390	Active
India, Rupees	INR	₹	0.01600	Active
Bahrain, Dinar	BHD	.د.ب	170.02000	Active

- To delete the currency from the list, place your mouse cursor on the currency row and click the trash icon besides it

7.3.4. Manage Tax Calculations

Allows you to set national and international tax rates to be applied to invoices, products, sales orders and purchase orders.



Tax Calculations

+ Add New Tax

Product & Service Taxes

Tax Name	Tax Value	Status
VAT	4.500%	☑
Sales	10.000%	☑
Service	12.500%	☑
Social Security Tax	4.200%	☑
GST	10.000%	☑

+ Add New Tax

Shipping & Handling Taxes

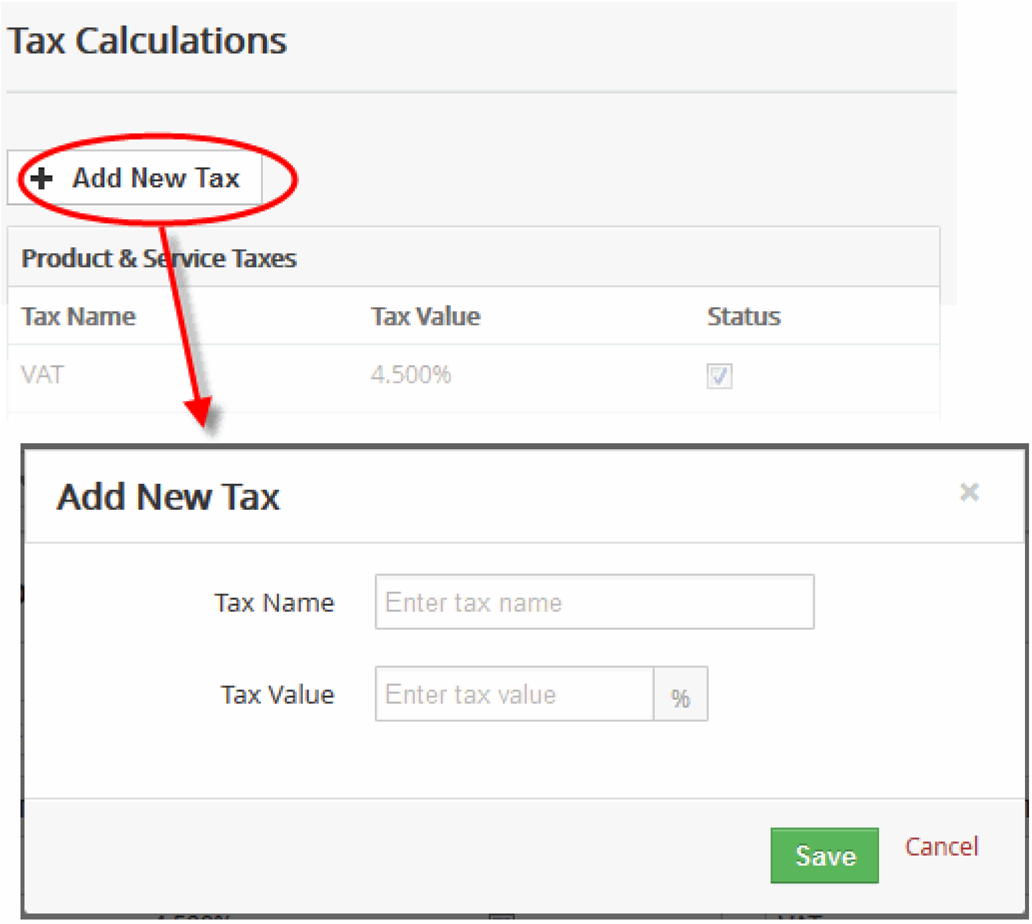
Tax Name	Tax Value	Status
VAT	4.500%	☑
Sales	10.000%	☑
Service	12.500%	☑

The taxes like VAT, sales and service taxes are default taxes that ship with CRM.

You can add a new taxes for 'Product & Services' and 'Shipping & Handling'.

To add new tax

- Click the cog icon at top-right and open 'CRM Settings'
- Click 'Other Settings' > 'Tax Calculations'
- Click 'Add New Tax'



- Create a name for the tax and the tax's percentage. The figure you enter here will be added to the total cost of the purchase.
- Click 'Save'

The tax will be added to the tax list.

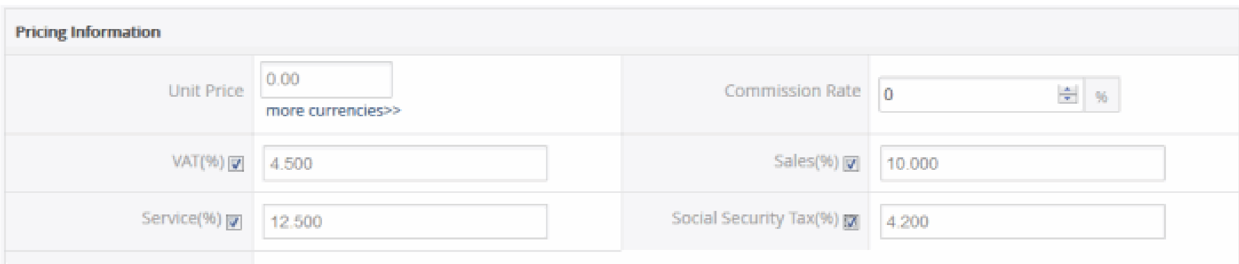
- You can enable/disable existing taxes by checking or un-checking the 'Status' box.
- All enabled taxes will be available for inclusion in modules like 'Products' and 'Services'.

To edit a tax

- Click the cog icon then 'CRM Settings'
- Place your mouse cursor on a tax and click the pencil icon beside it
- Change tax name, value and status as required
- Click 'Save'

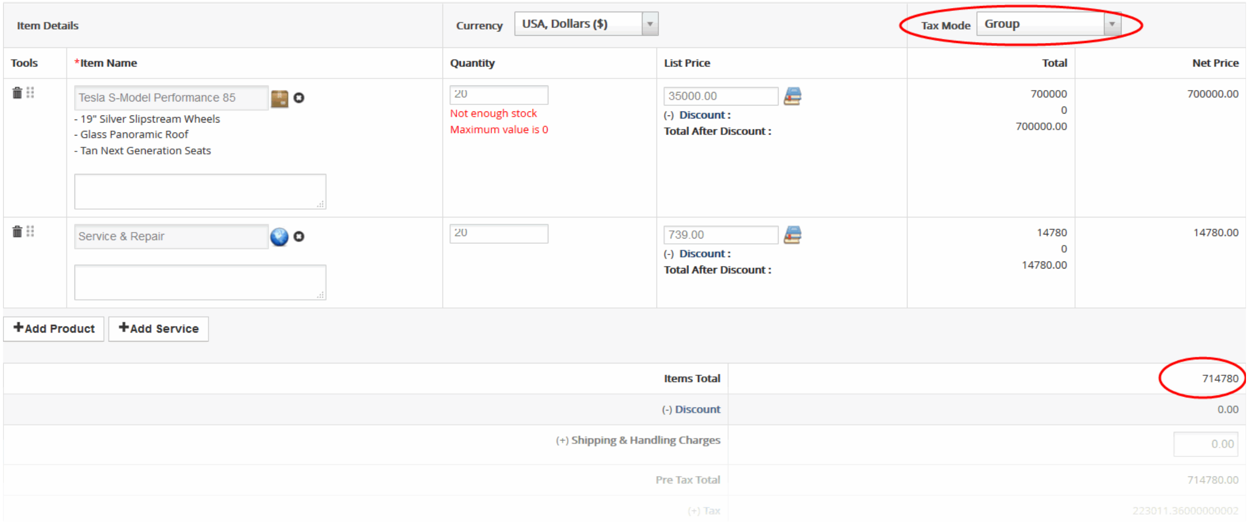
Include Taxes in Products and Services

While creating a product or a service, you can configure taxes in the 'Pricing Information' block:



- You can select 'Group' tax mode while creating an invoice, sales order, purchase order or quote. Tax values will be automatically displayed and added to net total.

- To set the tax values of particular product(s), set the tax mode as 'Individual'.



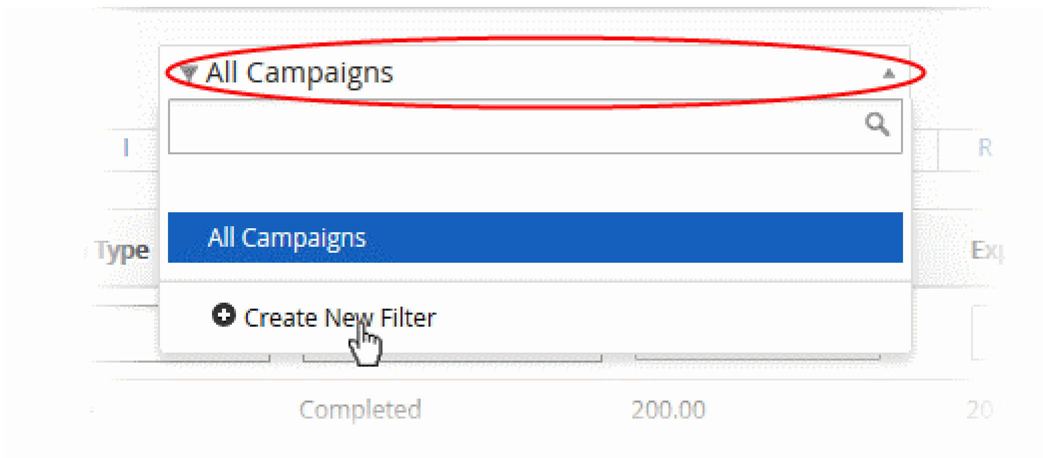
- See **Add a Sales Order** and **Add a Purchase Order** for more details.

8. Custom Views

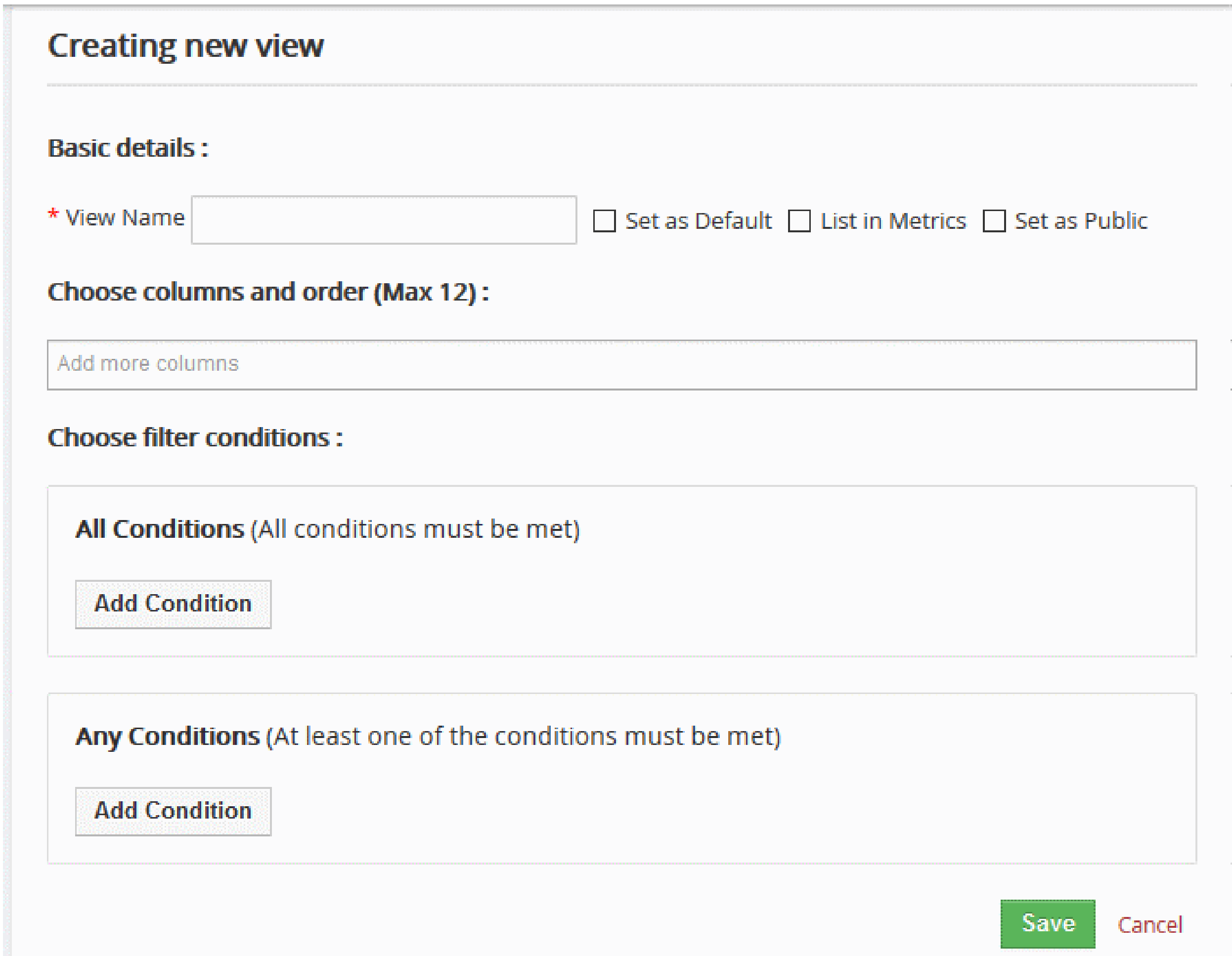
- The 'filter' drop-down at the top-center of a module's index page lets you create custom views of your records
- For example, you can create quick views of campaign records which are assigned to a certain person, which are due to close by a certain date, or which have a certain expected revenue.
- You can set filters based on multiple conditions.

To create a custom view

- Open a module index page. For example, campaigns, opportunities, contacts, leads etc
- Click the drop-down menu at the top center and choose 'Create New Filter':



The 'Create New View' interface will open:



Create new Filter view - Form Parameters	
Form Parameter	**Description**
View Name	Enter a name for the view. • Set as Default - This view will be displayed by default when you open the module. • List in Metrics - The view will be added to the list of shortcuts in the 'Key Metrics' widget on the home screen. This lets you quickly access the view from the home screen. See **View and Manage the Home Console** for more details. • Set as Public - The view will also be available to other staff members
Choose columns and order (Max 12)	Select the columns that you want to appear in your view
Choose filter conditions	Create your filter rule. Rules are setup using the following, simple, formula: Field - Condition - Value • Field - Select a field from the module you are working with. Available fields will vary by module. • Condition - For example, 'contains', 'equals', 'starts with' etc • Value - Select a specific item from the list. The contents of the value drop-down will change according to the field chosen.

	For example: Product Name - Equals - Software

- Click 'Add Condition' to add another filter to the rule
- If you intend to add multiple conditions then choose one of the following:
  - 'All Conditions' - All conditions in the rule must be met before a record will be added to the view
  - 'Any Condition' - If any condition is met then the record will be included in the view.
- Click 'Save'

You can select your new view by clicking the 'Filter' drop-down on the module index page.

About Comodo Security Solutions

Comodo Security Solutions is a global innovator of cybersecurity solutions, protecting critical information across the digital landscape. Comodo provides complete, end-to-end security solutions across the boundary, internal network and endpoint with innovative technologies solving the most advanced malware threats. With over 80 million installations of its threat prevention products, Comodo provides an extensive suite of endpoint, website and network security products for MSPs, enterprises and consumers.

Continual innovation and a commitment to reversing the growth of zero-day malware, ransomware, data-breaches and internet-crime distinguish Comodo Security Solutions as a vital player in today's enterprise and home security markets.

About Comodo Cybersecurity

In a world where preventing all cyberattacks is impossible, Comodo Cybersecurity delivers an innovative cybersecurity platform that renders threats useless, across the LAN, web and cloud. The Comodo Cybersecurity platform enables customers to protect their systems and data against even military-grade threats, including zero-day attacks. Based in Clifton, New Jersey, Comodo Cybersecurity has a 20-year history of protecting the most sensitive data for both businesses and consumers globally. For more information, visit comodo.com or our **blog**. You can also follow us on **Twitter** (@ComodoDesktop) or **LinkedIn**.

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