

HOW TO USE CRM

The Customer Relations (CRM) module is used to manage customers through the entire sales process. Potential customers (leads) are created in CRM, and then are converted to customers in the Customer Master after the related enquiries (opportunities) are won.

The CRM module is different to most other modules in Baseplan Enterprise as it is a single management screen with a separate *Search* screen for advanced searching on both key and detailed customer information. It also uses a right click functionality to add details to the customer record. The module includes location mapping capabilities, integrates with other Baseplan modules and products, and has real time synchronisation to Microsoft Outlook and Lotus Notes, as well as PDA's Blackberry and iOS devices.

Software Version: 1801

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Note: When creating new records in CRM, some fields are mandatory and marked by an asterisk (*). Business processes determine which additional fields must be entered for each record.

CREATING A NEW CUSTOMER RECORD

Potential customers are first created in CRM. Typically, after an enquiry is won these customers are converted to records in the Customer Master and are linked to CRM by the **Customer Code**.

Existing companies / customers can be searched in CRM by entering the company in the **Company Name** field and clicking FILTER. If no records are found, it indicates that this is a new customer and must be added to CRM.

1. From the Menu, select **Customer Relations > Company Master** (Customers)
2. Click ADD NEW
3. In the *Company Details* grid, enter the **Company Name**
4. Enter the company location using **Address Line 1, Address Line 2, Suburb, State, Postcode** and **Country** fields
5. Enter the company **Phone** number including the country code

For example: Entering +61 at the beginning of Australian phone numbers.

6. Enter the **Fax** number, if available
7. Enter the **ABN** of the business
8. Enter the **Website**, if available
9. Select the relevant classification that the customer belongs to from the **Class** drop down list
10. Select the **Group** that the customer belongs to
11. Select the source from which the customer heard about / located your business, from the **Referred by** drop down list
12. Select the **Customer Type**
13. Select the **Industry** that the customer operates in
14. If the company is a subsidiary of another entity, select the **Parent Company**
15. Select the geographical location of the company from the **Region** drop down list
16. If the customer is already using a different product, select it from the **Existing Brand** drop down list
17. Select the **Sales Rep** responsible for managing this customer
18. Select a **Secondary Sales Rep**, if required

19. Click SAVE

This will generate a unique number in the **Company ID** field.

Saving a new customer record will also create a new site with the address details entered in the *Company Details* grid.

Creating a New Site for Customer

Multiple sites can be linked to a new customer record. A site may also be a 'store location' or 'branch'.

1. From the Menu, select **Customer Relations > Company Master** (Customers)
2. Display the relevant customer record
3. Right click in the *Sites* grid of the *Details* panel
4. Select **Add Item > Site**

This will open the *Site Details* grid allowing the sales rep to enter details of the customer site.

Name will default from the **Company Name** in the *Company Details* grid.

5. Enter the site location details in the **Address Line 1, Address Line 2, Suburb, State, Postcode** and **Country** fields
6. Enter the site **Phone** number, preferably beginning with the country code
7. Enter the site **Fax** number

Sales Rep will default to the sales rep selected in the *Company Details* grid. This can be changed, if required.

8. Select the site **Region**
9. Select the product that the customer is currently using at this site from the **Existing Brand** field
10. Enter the number of equipment items located at the site in the **No. of Items** field
11. Check **Main Site** if this is the primary site of the customer
12. Click SAVE in the grid

Info: "Do you want to update the last contacted by date?"

Clicking YES will update the Last Contacted field in the *Company Details* and *Site Details* grids.

The new site will be added to the *Sites* grid. Double clicking the site record will display all the entered information alongside a pinned Google Map location in the *Site Details* grid.

Creating a New Contact for Site

Multiple contacts can be linked to a new site record. When creating a new contact, the details contain some personal information about the contact that can be used for marketing/client relationship purposes.

1. From the Menu, select **Customer Relations > Company Master** (Customers)
2. Display the relevant customer record
3. In the *Sites* grid, select the site that a contact needs to be added for
4. Right click and select **Add Item > Contact**

This will open the *Contact Details* grid allowing the user to enter details of the contact.

5. The site record that was selected to create this contact will default in the **Site** field.
6. Enter the title and **First Name** of the contact
7. Enter the **Middle Name** and **Last Name**, if available
8. Enter the **Position** that the contact holds at the company
9. Enter the **Department** and **Division** that the contact operates in
10. Enter the contact **Phone** number, preferably beginning with the country code
11. Enter the contact **Fax** number
12. Enter the **Direct Ph** (direct phone number), **Mobile** and **Home Ph** (residence contact), if available
13. Enter the contact **Email**
14. An alternate email address can be entered in the **Email 2** field
15. Enter general details about the contact in the **Interests** and **Family** fields

This information can be useful for building rapport with the customer.

16. Enter the level of **Influence** that the contact has in the company

For example: Decision Maker

The **Do Not Solicit** checkbox will be checked by default.

17. Click SAVE

The new contact will be added to the *Contacts* grid.

Creating a New Enquiry from Contact

Enquiries are opportunities generated from potential or existing customers. Multiple enquiries can be generated from the same contact.

Enquiries can have many types - customers asking about pricing or additional information being requested from the customer.

1. From the Menu, select **Customer Relations > Company Master** (Customers)
2. Display the relevant customer record
3. In the *Contacts* grid, select the contact that an enquiry needs to be added against
4. Right click and select **Add Item > Enquiry**

This will open the *Enquiry Details* grid allowing the user to enter information regarding the enquiry.

The contact record that was selected to create this enquiry will default in the **Contact** field. The site record that was used to create this contact will default in the **Site** field.

5. Select the **Type** of enquiry
6. Enter the date this enquiry is estimated to be closed in the **Projected Close** field
7. Enter a **Description** of the enquiry
8. Enter the **Estimated Value** of the enquiry
9. Select the urgency of the enquiry from the **Priority** drop down list
10. Select the current **Stage** of the enquiry

If the stage has a Default Status configured, this value will default in the **Status** field.

11. Select the percentage **Probability** of winning this enquiry

An enquiry will go through various stages, such as 'Discussion', 'Proposal', 'Negotiation' before it is 'Closed' by winning, losing or abandoning. When an enquiry is closed, a **Close Reason** can be selected and additional information can be entered in the **Reason Details** field.

12. Click SAVE

The new enquiry will be added to the *Enquiries* tab.

Linking Equipment Details to an Enquiry

When creating a new enquiry, after all the mandatory details are entered, equipment details can be added by following the steps below:

1. In the *Product Details* grid within the *Enquiry Details* grid, click on the EDIT button

This will open the *Enquiry Details* screen.

2. Click ADD NEW
3. Select the equipment details related to the enquiry from the **Name** drop down list

Items available for selection from this list are configured in the **Equipment Management > Configuration > Equipment Make/Model**.

4. Enter the GST inclusive value of the equipment item in the **Value** field

The **Estimated Value** in the *Enquiry Details* grid will be updated depending on the amount entered in this field.

5. Enter the number of items this enquiry relates to in the **Qty** field
6. Select the **Category** of the item
7. Select the **Site ID** of the location that this product enquiry has originated from
8. Click SAVE

Creating a New To Do for an Enquiry

To dos are planned activities required to be completed when working on an enquiry. As an enquiry moves through different stages, the sales rep may create multiple to dos.

1. From the Menu, select **Customer Relations > Company Master** (Customers)
2. Display the relevant customer record
3. In the *Enquiries* grid, select the enquiry that a to do needs to be added against
4. Right click and select **Add Item > To Do**

This will open the *To Do Details* grid allowing the sales rep to enter information regarding the planned activity.

The enquiry record that was selected to create this to do will default in the **Enquiry** field. The contact record that was used to create this enquiry will default in the **Contact** field. The site record that this contact relates to will default in the **Site** field.

5. Select the **Type** of to do
6. Enter the **Due Date** and **Due Time** that the to do must be completed by
7. Enter the estimated **Duration**
8. Enter the **Subject** of the to do
9. Check **Remind Me** to enable the reminder option for this appointment on your calendar

If the exchange server parameter **Email System** contains the email server, adding a to do for a customer will also add an appointment to the sales rep's calendar in their email system. **For example:** Outlook, Lotus Notes.

This appointment will be added to the **Due Date** and **Due Time** entered in the *To Do Details* grid.

10. Click SAVE

The new to do will be added to the *To Do* tab.

Completing a To Do

1. Double click on the relevant record in the *To Do* tab

This will display the information regarding the to do in the *To Do Details* grid.

2. Click EDIT
3. Check the **Completed** checkbox
4. Click SAVE

A message will be displayed asking the sales rep if they would like to notify the to do entry creator that this entry has been completed, and follow up this to do.

5. Check the relevant options
6. Click OK

Creating a New Note for To Do

Notes are used for entering the outcome of a to do. Typically, each to do will have one note related to it. However, multiple notes can be entered against one to do.

1. From the Menu, select **Customer Relations > Company Master** (Customers)
2. Display the relevant customer record
3. In the *To Do* grid, select the to do that a note needs to be added against
4. Right click and select **Add Item > Note**

This will open the *Note Details* grid allowing the sales rep to enter information regarding the result of the selected to do.

The to do that was selected to create this note will default in the **To Do** field. The enquiry record that was used to create the to do will default in the **Enquiry** field. The contact record that the enquiry relates to will default in the **Contact** field. The site linked to the contact will default in the **Site** field.

5. Select the **Type** of note
6. Select the **Sales Rep** responsible for actioning this note
7. Enter a **Description**
8. Click SAVE

The new note will be added to the *Notes* tab.

USING THE ENQUIRY WIZARD

The enquiry wizard enables sales reps to quickly create a new customer record in CRM from a single screen. Customer details, such as sites, contacts, enquiries, to dos and notes can also be added from the same screen.

Note: When creating new records in CRM, some fields are mandatory and marked by an asterisk (*). Business processes determine which additional fields must be entered for each record.

1. From the Menu, select **Customer Relations > Company Master** (Customers)
2. Click on the WIZARD FORM button in the *Company Details* grid

This will open the *Enquiry Wizard* screen.

3. Enter company details in the *Company* panel

Company Name, Address Line 1, Suburb, State, Postcode, Group, Referred by, Customer Type and Industry are mandatory fields.

4. Enter the customer site details in the *Site* panel

Site Name is a mandatory field.

5. Alternatively, click the SAME AS COMPANY button if the company and site details are the same

6. Enter details of the site contact person in the *Contact* panel

First Name, Last Name and Phone are mandatory fields.

7. Enter details of the enquiry in the *Enquiry* panel

Start Date, Type, Probability, Stage, Expected Close Date and Equipment Details are mandatory fields.

8. Enter details of the activity that needs to be carried out for the enquiry in the *To Do* panel

Date, Time, Due Date, Due Time, Subject, Description, Type and Duration (in minutes) are mandatory fields.

Note: Checking the **Calendar** checkbox in the *To Do* panel will add a reminder for this to do to the user's calendar.

9. Enter the outcome of the to do in the *Note* panel

Type, Date, Details and Time are mandatory fields.

10. Click SUBMIT

This will display the entered details in the *Company Master (Baseplan CRM)* screen.

USING THE RIGHT CLICK FUNCTIONALITY

In the *Sites*, *Contacts*, *Enquiries*, *Notes* and *To Do* grids, the right mouse click functionality can be used to perform certain tasks such as:

Add Item

Allows the sales rep to create sites, contacts, enquiries, to dos and notes from the relevant *Details* grids.

Edit Item

Allows the sales rep to edit the selected record in the relevant *Details* grid.

View Item

Allows the sales rep to view the selected record in the relevant *Details* grid.

Create or View Rental Quotes

Available for existing customers (records with a **Customer Code** in the *Company Details* grid). These options are available from the *Contacts* grid only.

Set Preferences

Clicking the 'Preferences' option from the right click Menu displays the *User Preferences* screen.

1. Click ADD NEW
2. Select the user name that the preference is to be configured for, from the **User Code** drop down list
3. Select the relevant **Item**

For example: CRM_Enquiries if a preference is to be set for a field in the *Enquiry Details* grid.

4. Select the **Field Name**

For example: Enq_Probability if a preference is to be set for the **Probability** field.

5. Enter the **Field Value**
6. Select a colour from the **Colour when important list** or the **Colour when critical list**
7. Click SAVE

This will display the selected field in the preferred colour when its value is the same as that configured in **Field Value**.

Set Colour

Allows the sales rep to display the selected detail line in a preferred colour. It can be cleared by selecting the same detail line, right clicking and selecting the 'Clear Colour' option.

ATTACHING FILES

The *Attachments* tab is displayed in the *Customer Activity Snapshot* grid of the *Company Master (Baseplan CRM)* screen. It defaults to displaying attachments for the company / customer, but will change depending on the grid it is accessed from.

1. From the Menu, select **Customer Relations > Company Master** (Customers)
2. Display the relevant customer record
3. Display the site, contact, enquiry, to do or note record in the *Details* panel that attachments are to be added to
4. Click EDIT
5. Click on the ATTACHMENTS button

This will display the associated *Attachments* grid in the *Customer Activity Snapshot* area.

6. Right click within the *Attachments* grid
7. Click the 'Add New' option

This will allow the user to select a file from the path configured in the **Attachment Directory** parameter.

8. Alternatively, drag and drop attachments into the *Attachments* grid

Right clicking on the relevant item in the *Attachments* grid will also allow the sales rep to view or delete the attachment.

MAPS FUNCTIONALITY

Customer locations can be viewed on Google Maps using the MAP button available in the following grids:

- Company Details
- General Details
- Site Details

Customer locations are indicated by a pin on the map. Sites are indicated by pins with the letter 'S'. Clicking on the pin displays details, such as company name, phone number and last contacted date.

The following standard Google Maps functionality is also available for use:

- Zooming and panning tools on the left side of the map
- Satellite button for changing the map display to show satellite imagery with labels
- Street View

Locations on the map can be filtered to show:

- Active customers
- Active enquiries
- Active to dos or
- All

SENDING EMAILS FROM CRM

Emails can be sent to the contacts entered in CRM:

1. From the Menu, select **Customer Relations > Company Master** (Customers)
2. Display the relevant contact in the Contact Details grid
3. Double click **Email** or **Email 2**, depending on which field contains the ID that the email must be sent to

This will allow the sales rep to select the configured email service provide, i.e. Microsoft Outlook.

Alternatively, a web login from the Google Chrome browser can be chosen.

Note: The logged in sales rep will be the sender on emails sent from CRM. These emails will not be saved in Baseplan Enterprise.

The Baseplan Exchange Adapter synchronises a sales rep's Baseplan CRM contacts, to dos and enquiries to the sales rep's Microsoft Outlook via Microsoft® Exchange Server. It allows sales reps to use either Baseplan CRM or Microsoft Outlook to manage their appointments.

Once the sales rep has created the to do or enquiry in CRM, it will be synchronised with Microsoft Outlook and any changes made to the time or date of the appointment in Microsoft Outlook will be reflected in CRM.

Similar tracking is done on contacts such that when changes are made to contacts in either CRM or Microsoft Outlook, the change is reflected in the other system.

Please contact your Baseplan Account Manager for more information.

USING THE SEARCH FUNCTIONALITY

The *Company Master (Baseplan CRM)* screen contains extensive information. Therefore, a separate *Search* screen is available for searching the required customer records or details.

The *Search* screen is a replication of the *Company Master (Baseplan CRM)* screen to a large extent. The mapping between the two screens is shown below:

COMPANY MASTER SCREEN GRIDS	SEARCH SCREEN PANELS / GRIDS
Company Details	Company Details (Customer Details)
Site Details	Site
Contact Details	Contacts
Enquiry Details	Enquiries
Note Details	Notes
To Do Details	To Do

1. From the Menu, select **Customer Relations > Search**
2. Enter the required search field in the *Company Details* or *Details* panel
3. Click FILTER

This will display the records matching the filter criteria, in the *Company Master (Baseplan CRM)* screen.

If multiple records are found, the MOVE NEXT button in the toolbar can be used to access all the matching records.

Relevant contacts and enquiries can also be printed or exported to Excel by entering the required filtering criteria in the *Search* screen and selecting **Filters > Show Contacts Datasheet View** or **Filters > Show Enquiries Datasheet View** from the toolbar.

CREATING A CAMPAIGN

A list of customers can be exported from CRM using the Campaigns functionality.

1. From the Menu, select **Customer Relations > Campaigns**
2. Click ADD NEW
3. Enter a campaign **Description**

Branch will default to the branch code of the logged in sales rep.

User will default to the user name of the logged in sales rep.

Date will default to the current date.

The **Status** of the campaign will be 'CURRENT'.

4. Click SAVE
5. Click the CREATE CAMPAIGN button in the toolbar

The *Create Campaign* screen is used to filter and select the customers to be included in the campaign. Baseplan Enterprise searches for all the customer records that meet the filtering criteria.

6. Select the relevant **Region**
7. If a further drill down is required, click SHOW BRANCH >>

This will display all the branches that have been used in conjunction with the selected **Region** in the *Company Master (Baseplan CRM)* screen.

8. Select the relevant **Branch**
9. If a further drill down is required, click SHOW SALES REP >>

This will display all the sales reps that have been used in conjunction with the selected **Region / Branch** in the *Company Master (Baseplan CRM)* screen.

10. Select the relevant **Sales Rep**
11. If a further drill down is required, click SHOW INDUSTRY >>

This will display all the industries (markets) that have been used in conjunction with the selected **Region / Branch / Sales Rep** in the *Company Master (Baseplan CRM)* screen.

12. Select the relevant **Industry**

Note: Multiple records can be selected from the **Region, Branch, Sales Rep** and **Industry** fields by holding down the SHIFT key on the keyboard and clicking on the required records.

13. Click SELECT CONTACT

This will display all the customers that match the filtering criteria, in the *Details* panel.

14. Use the **Select** checkbox to include customers in the campaign or click SELECT ALL if all customers from the *Details* panel are to be included
15. Click the CREATE CAMPAIGN DETAILS button at the bottom of the screen

Info: "Operation successful"

16. Click OK
17. Click CLOSE on the *Create Campaigns* screen

This will display the selected customers in the *Details* panel of the *Campaigns* screen.

Exporting a Campaign

1. Once the required list of customers is displayed in the *Campaigns* screen, select **Actions > Export Campaign** in the toolbar

This will display the *Export Campaign* screen listing all the fields from the *Customer Details*, *Site Details* and *Contact Details* grids of the *Company Master (Baseplan CRM)* screen.

2. Select the required combination of fields from the **Customer**, **Site** and **Contact** columns
3. Click EXPORT TO EXCEL if the selected information needs to be exported to a spreadsheet
4. Alternatively, click EXPORT TO CSV if the selected information needs to be exported to a .CSV file

These files can then be used in mail merges for marketing campaigns.

CRM ACTIONS AND VIEWS

Both **Actions** and **Views** Menus will be available in the toolbar of the *Company Master (Baseplan CRM)* screen if an existing customer (linked to the Customer Master via the **Customer Code**) is displayed. Only the **Actions** Menu will be available for potential customers that are yet to be converted to records in the Customer Master. Typically, a customer is converted after an enquiry is won.

Actions

Create

The sales rep can create the following items from a customer record:

Rental Quote

Clicking this action will open the *Rental Quote* screen.

When creating a rental quote for an existing customer, the quote is created with contact details from the CRM customer (**Name, Phone, Fax** and **Mobile** numbers). The quote is created using the branch code of the logged in sales rep.

When creating a rental quote for a new customer (with no link to a customer record in the Customers module), the quote is created for the **Customer Code** entered in the parameter **Quote Customer Placeholder**.

Sales Quote

The relevant enquiry record must be displayed in the *Enquiry Details* grid before selecting this action.

Clicking the **Sales Quote** action will open the *Customer Quote* screen with the customer details, **Sales Rep, Branch** and **Enquiry No.** from the CRM enquiry. The **Created By** field will default to the user name of the logged in sales rep.

Note: The parameter **Use Company Details for CRM Sales Quotes** must be enabled for customer details to be copied from the *Company Master (Baseplan CRM)* screen onto the sales quote.

Service Quote

An enquiry of **Type** 'Service' with at least one linked equipment item must be displayed in the *Enquiry Details* grid before selecting this action.

Clicking the **Service Quote** action will open the *Service Quotes* screen. Information from the *Company Details* grid of the *Company Master (Baseplan CRM)* screen will default in the *Customer* panel of the *Service Quotes*

screen. Details of the product (equipment) linked to the enquiry will default in the *Equipment* panel of the of the *Service Quotes* screen.

Template

This action will allow the sales rep to create a Microsoft Word Mail Merge template using the fields from the CRM module.

Clicking **Actions > Create > Template** from the *Company Master (Baseplan CRM)* screen will open a blank document in Microsoft Word. Clicking on the **Insert Mail Merge** drop down list in the toolbar of the document will display the fields from the customer record that can be used in the mail merge. This file will be saved with a .dot extension.

This template can be used to create documents using CRM customers.

Document Template

This action will allow the sales rep to create a document from an existing template.

When creating a document from a template, the user must open the relevant template. A new document can then be created based on this template. The merge fields in the document will be displayed as per the template. Clicking the **View Merge Data** button in the document will populate customer data into the fields.

Templates and documents can be created for introductory letters, mail outs, proposals and any other standard correspondence.

Preview Letter from Template

This action will allow the sales rep to view previously saved documents.

The selected document will open as a 'Read-only' document. Changes can be made to the document, but will need to be saved with a different file name.

Map

This action will display the customer's location, as entered in the *Company Details* grid of the *Company Master (Baseplan CRM)* screen, pinned on a full screen Google Map. Clicking on the pin will display details, such as company name, phone number and last contacted date.

View

This action allows the sales rep to view the following items linked to the displayed customer:

- Rental Quotes
- Sales Quotes
- Documents from Templates
- Price Books

Note: The enquiry that is linked to the sales quote must be open in the *Enquiry Details* grid for viewing a sales quote.

Price books are available for existing customers only.

Views

This Menu allows the sales rep to view information from other modules within the system. It is available for existing customers only.

Customer Master

The Customer Master contains all customer accounts. In order to create a transaction for a customer, a customer account must first exist in the Customer Master.

Customer Transactions

The *Customer Transactions* screen displays all transactions that have been posted to a customer's account.

Customer Collection Notes History

The *Collection Notes* screen is used to record communication with customers when following up outstanding amounts. All existing collection notes records for the customer can be viewed from this screen.

Rental History

The *Rental History* screen lists all rental contracts that have been created for the displayed customer.

Sales Orders

The *Sales Orders* screen is used to sell stock items to customers. Quotes, backorders, picking slips and invoices can be created from this screen. All existing sales orders can be viewed for the displayed customer using this View.

Service Job History

The *Service Job History* screen lists all service jobs and equipment inspections that have been created for the displayed customer.

Service Quote

An enquiry of **Type** 'Service' must be open in the *Enquiry Details* grid before selecting this View. The *Service Quotes* screen lists all the equipment service quotes that have been created for the displayed customer.

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