

HOW TO USE CRM MOBILITY

The Customer Relations (CRM) module in Baseplan Enterprise is a single-screen tool for managing the complete sales life cycle starting from potential customer (lead) creation through to conversion. Planned activities, such as to dos and appointments can also be managed from CRM.

Please refer to the 'How to Use CRM' guide for more information on the CRM module in Baseplan Enterprise.

Information created in CRM Enterprise can be accessed by in-field sales representatives (sales reps) using CRM Mobility on their device. A bi-directional sync exists between the CRM module in Baseplan Enterprise and the application.

The purpose of this document is to assist sales reps, sales managers and other business development personnel in understanding the features of CRM Mobility and using the relevant functionality for streamlining sales processes within the organisation, providing better visibility of opportunities and pipeline, and improving communication between the office and in-field staff.

Software Version: 4.2

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In order to use CRM Mobility, the user must be:

- a Baseplan user configured in Baseplan Enterprise
- configured as a sales rep in Baseplan Enterprise

Note: Ensure that the correct Baseplan User ID is selected from the **Baseplan User** drop down list when configuring a sales rep.

Events and reminders from CRM Mobility can be synced to the device calendar by navigating to the device's Settings > Baseplan CRM and sliding the **Calendar** toggle to the right.

This app is compatible with:

Device(s): iPad

Platform(s): iOS 6 and above

INSTALLING CRM MOBILITY

Before commencing the app download, please contact your Baseplan Account Manager to ensure your iOS, Baseplan Enterprise and CRM Mobility versions are compatible.

1. Download Baseplan CRM Mobility from the App Store

CRM Mobility will begin to load and the *Settings* screen will be displayed.

2. Enter the **Username**
3. Enter the **Password**

The same credentials used in Baseplan Enterprise will be used to log into CRM Mobility.

The user must also be configured as a sales rep in Baseplan Enterprise.

4. Enter the CRM **Server URL**
5. Tap the **Database** field

This will list all the databases configured for the entered server

6. Tap the relevant **Database**
7. Tap the calendar that the to dos must sync to, from the list displayed in the **To-Do Calendar** field
8. Tap the preferred **Calendar Sync**
9. Tap SAVE

This will display the *Home* screen listing all the companies from Baseplan Enterprise CRM in a collapsible drop down panel.

A collapsible side panel will be displayed with all the to dos assigned to the logged in sales rep and the sales rep's recent activity that occurred in CRM over the last 7 days. Tapping a record in the *Recent Activity* section will allow the sales rep to switch to the company linked to that activity. Items in the *Recent Activity* section are auto refreshed.

Note: After CRM Mobility is installed and the sales rep logs in for the first time, their connection details will be stored for future use. Thereafter, tapping the Baseplan CRM icon on the device will lead directly to the *Home* screen. If required, a different sales rep can log in by tapping the SETTINGS button and entering the relevant login credentials.

The data available for selection, such as **Group**, **Classification**, etc. from the CRM Mobility app is configured in Baseplan Enterprise.

USING THE ENQUIRY FORM

The Enquiry Form enables sales reps to create new customers and enquiries at the same time. Customer details, such as company, site, contact, enquiry, to dos and notes can be added from the same screen.

Records created from the Enquiry Form in CRM Mobility can be accessed from the *Company Master* screen in Baseplan Enterprise and vice versa.

1. Once logged in, tap the SHORTCUT button at the bottom of the *Home* screen
2. Tap **Enquiry Form**

Note: Mandatory fields are indicated in pink. Business processes determine which additional fields must be entered for each record.

On the *Company* panel:

3. Enter the company **Name**
4. Enter the company address using the **Address 1**, **Address 2**, **Suburb**, **State**, **Postcode** and **Country** fields
Selecting a **Suburb** will default the relevant **Postcode**, **State** and **Country**.
5. Enter the company **Phone**
6. Select the **Group** that the customer belongs to
7. Select the referral source from the **Referred By** drop down list
8. Select the **Customer Type**
9. Select the **Industry** that the company operates in
10. Select the geographical location of the company from the **Region** drop down list
11. If the customer is using a different product, select it from the **Existing Brand** drop down list
12. Select the relevant class that the customer belongs to from the **Classification** drop down list
13. Enter the company **Website**

Note: Details linked to an existing company can be displayed by selecting the required record from the **Company Name** field. Selecting a **Site Name** and **First Name** will then default relevant details in the *Site* and *Contact* panels, respectively. This can be used to add enquiries, to dos and notes for the company.

On the *Site* panel:

14. Tap SAME AS COMPANY to copy relevant fields from the *Company* panel
 15. Alternatively, enter the **Site Name**
 16. Enter the site address using the **Address Line 1**, **Address Line 2**, **Suburb**, **State**, **Postcode** and **Country** fields
- Selecting a **Suburb** will default the relevant **Postcode**, **State** and **Country**.
17. Select the geographical location of the site from the **Region** drop down list
 18. If the customer is using a different product at the site, select it from the **Existing Brand** drop down list
 19. Enter the site **Phone** number

On the *Contact* panel:

20. Select the **Title** of the contact
21. Enter the **First Name** of the contact
22. Enter the **Middle Name** and **Last Name**, if available
23. Enter the **Position** that the contact holds at the company
24. Enter the **Phone** number
25. Enter the **Direct Phone** of the contact
26. Enter the contact **Email**

On the *Enquiry* panel:

Enquiries are opportunities generated from potential or existing customers.

27. Enter the **Estimated Value** of the enquiry in dollars
- Start Date** will default to the current date. This can be changed, if required.
28. Select the enquiry **Type**
 29. Select the **Priority** of the enquiry
 30. Select the likelihood of winning the enquiry from the **Probability** drop down list
 31. Select the **Stage** that the enquiry is currently at
 32. If the customer is using a different brand, select it from the **Competitors** drop down list

33. Enter additional information about the enquiry in the **Details** field, if required
34. Enter the date the site inspection was carried out in the **Inspection Date** field, if applicable
35. Enter the date the demonstration to the customer was completed in the **Demo Date** field, if applicable
36. Enter the date the quote was presented to the customer in the **Quote Date** field, if applicable
37. Select the **Status** of the enquiry
38. Enter the **Close Date**

On the *To-Do* panel:

Date and **Time** will default to the current date and time. These can be changed, if required.

39. Select the to do **Type**

By default, the to do will be assigned to the logged in sales rep. This can be changed, if required.

40. Enter the deadline for this to do in the **Due Date** and **Due Time** fields

41. Enter the estimated **Duration**

42. Slide the **Calendar** toggle to the right to sync the to do with the device calendar

If synced, upcoming to dos will trigger reminders on the device.

43. Enter the to do **Subject** and **Description**

On the *Note* panel:

44. Select the note **Type**

Date and **Time** will default to the current date and time. These can be changed, if required.

45. Enter additional information about the note in the **Details** field

46. Tap SUBMIT

CREATING A NEW COMPANY

The *Company* panel displays on the *Home* screen when the sales rep logs into CRM Mobility. It lists all the existing companies from the CRM module in Baseplan Enterprise.

To add new companies to the list:

1. Tap ADD NEW

This will open the *Add New Company* screen.

2. Enter the company name in the **Name** field

This is a mandatory field.

3. Enter the company address using the **Address Line 1**, **Address Line 2**, **Suburb**, **Postcode**, **State** and **Country** fields

Selecting a **Suburb** will default the relevant **Postcode**, **State** and **Country**.

4. Select the geographical location of the company from the **Region** drop down list
5. Enter the company **Phone** number
6. Enter the company **Fax** number, if available
7. Enter the company **Website**
8. Select the relevant class that the customer belongs to from the **Classification** drop down list
9. Select the customer type from the **Type** drop down list
10. Select the **Industry** that the company operates in
11. If the customer is using a different product, select it from the **Existing Brand** drop down list
12. Select the **Salesperson** responsible for managing this customer
13. Select the referral source from the **Referred By** drop down list
14. Select the **Group** that the customer belongs to
15. Tap SAVE

This will display the *Company Details* screen with key company information and the following overlay message:

Info: "Add a new To-Do for this company?"

Tapping NO will return to the *Company Details* screen.

16. Tap CLOSE

Tapping YES will display the *Add To-Do* screen.

Please refer to the [‘Adding To Dos’](#) section in this document for information on creating to dos.

Editing an Existing Company Record

1. On the *Company* panel, find the relevant record using the **Search Company** field
2. Tap SEARCH on the keypad

Note: A record can be cleared from the **Search Company** field by tapping the REFRESH button.

3. Alternatively, scroll down to search for the company
4. Tap the relevant company from the list

This will display the *Company Details* screen with key company information.

Note: If a company website is configured, tapping the VIEW button next to the **Website** field will open the company webpage in the web browser.

5. Tap the EDIT button at the bottom of the screen

This will display the *Edit Company* screen with all the existing information.

6. Edit the required field(s)
7. Tap SAVE

This will display the *Company Details* screen with updated details.

Changes made to existing companies from CRM Mobility are also updated in Baseplan Enterprise.

CREATING A NEW SITE

Saving a new company record will create a new site with the address entered in the *Add New Company* screen. This will be marked as the main site.

One or more sites can be added to a company record.

The sites created or edited from CRM Mobility can also be viewed in the *Sites* panel of the *Company Master* screen in Baseplan Enterprise.

1. On the *Company* panel, tap the relevant record
2. Tap the SITES button in the footer of the *Home* screen

This will display the existing list of sites linked to the selected company.

The main site will be marked by an asterisk “*”.

3. Tap ADD NEW

This will open the *Add Site* screen.

4. Enter the **Site Name**

This is a mandatory field.

5. Enter the site address using the **Address 1**, **Address 2**, **Suburb**, **Postcode**, **State** and **Country** fields

Selecting a **Suburb** will default the relevant **Postcode**, **State** and **Country**.

6. Enter the site **Phone** number

7. Enter the site **Fax** number, if available

8. Select the geographical location of the site from the **Region** drop down list

9. Select the **Salesperson** responsible for managing this customer site

10. Enter the number of equipment items located at the site in the **No. of Machines** field

11. Slide the **Main Site** toggle to the right if this is the primary site of the company

12. Tap SAVE

Info: “Would you like to update company last contacted date?”

Tapping YES will update the **Last Contacted** field in the *Company Details* grid of the *Company Master* screen in Baseplan Enterprise.

Tapping NO will return to the *Sites* screen.

The newly added site will be listed on the *Sites* screen for the relevant company.

Editing an Existing Site Record

1. On the *Company* panel, tap the relevant record
2. Tap the SITES button in the footer of the *Home* screen
3. On the *Sites* screen, tap the site to be edited

This will display an adjacent screen with key site information.

Note: Tapping the pin next to the site address will display the site location pinned on the device's native map application.

4. Tap the EDIT button at the bottom of the screen

This will display the *Edit Site* screen with all the existing information.

5. Tap the *Edit Site* screen
6. Edit the required field(s)

Note: A site can be made inactive by sliding the **Inactive** toggle to the right.

7. Tap SAVE

Info: "Would you like to update company last contacted date?"

Tapping YES will update the **Last Contacted** field in the *Company Details* grid of the *Company Master* screen in Baseplan Enterprise.

Tapping NO will return to the *Sites* screen.

The edit will be saved to the site record.

Changes made to existing sites from CRM Mobility are also updated in Baseplan Enterprise.

ADDING A NEW CONTACT

One or more contacts can be added to a company record.

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

1. On the *Company* panel, tap the relevant record
2. Tap the CONTACTS button in the footer of the *Home* screen

This will open the *Add Contact* screen.

3. Select the **Title** of the contact
4. Enter the **First Name** of the contact

This is a mandatory field.

5. Enter the **Middle Name**, if available
6. Enter the **Last Name**

This is a mandatory field.

7. Enter the **Phone** number
8. Enter **Fax** number, if available
9. Enter the **Direct Phone** of the contact
10. Enter the **Mobile** number

11. Enter the contact **Email**

An alternate email address can be entered in the **Alternate Email** field.

12. Select the **Site** that this contact operates at or manages
13. Enter the **Position** that the contact holds at the company
14. Enter the **Department** and **Division** that the contact operates in
15. Enter general details about the contact in the **Interests** and **Family** fields
16. Enter the level of **Influence** that the contact has in the company

For example: Decision Maker

17. Tap SAVE

Info: “Would you like to update the company last contacted date?”

Tapping YES will update the **Last Contacted** field in the *Company Details* grid of the *Company Master* screen in Baseplan Enterprise.

Tapping NO will return to the *Contacts* screen.

The newly added contact will be listed on the *Contacts* screen for the relevant company.

Editing an Existing Contact Record

1. On the *Company* panel, tap the relevant record
2. Tap the CONTACTS button in the footer of the *Home* screen

By default, the *Contacts* screen will list all the contacts linked to the selected company regardless of the site.

To view contacts linked to a particular site, tap the **Site** field and select the relevant record.

3. On the *Contacts* screen, tap the contact to be edited

This displays an adjacent screen with key contact information.

Note: Tapping the MAIL icon next to the **Email** field will enable the sales rep to send an email from the device.

Tapping the pin next to the **Site** field will display the site location pinned on the device's native map application.

4. Tap the EDIT button at the bottom of the screen

This will display the *Edit Contact* screen with all the existing information.

5. Edit the required field(s)
6. Tap SAVE

Info: "Would you like to update company last contacted date?"

Tapping YES will update the **Last Contacted** field in the *Company Details* grid of the *Company Master* screen in Baseplan Enterprise.

Tapping NO will return to the *Contacts* screen.

The edit will be saved to the contact record.

Changes made to existing contacts from CRM Mobility are also updated in Baseplan Enterprise.

ENQUIRIES

Viewing Enquiries

Enquiries are opportunities generated from new or existing customers. Enquiries created in Baseplan Enterprise can be viewed in CRM Mobility and vice versa.

New enquiries can be created in CRM Mobility using the [Enquiry Form](#). When creating enquiries for existing companies, a to do and note must also be created.

To view enquiries related to a particular company:

1. On the *Company* panel, select the relevant record
2. Tap the ENQUIRY button in the footer of the *Home* screen
3. Tap the FILTER button at the bottom of the *Enquiry* screen
4. Slide the **Selected Company** toggle to the right

Enquiries can also be filtered by **Status**.

5. Tap DONE

This will display all the enquiries (as per the filtering criteria) on the *Enquiry* screen.

Note: To view all of the enquiries in the system irrespective of the company, ensure that the **Selected Company** toggle is to the left.

To view only the enquiries assigned to you, slide the **My Enquiries** toggle to the right.

Editing an Existing Enquiry

1. Display the relevant enquiry on the *Enquiry* screen
2. Tap the enquiry
3. Tap **Show Details**

This will display an adjacent screen listing key details of the enquiry.

4. Tap EDIT

This will display the *Edit Enquiry* screen.

5. Make the required changes
6. Tap SAVE

Info: “Would you like to update the company last contacted date?”

Tapping YES will update the **Last Contacted** field in the *Company Details* grid of the *Company Master* screen in Baseplan Enterprise.

Tapping NO will return the user to the *Enquiry* screen.

The enquiry record will be saved.

Editing a Company Record from Enquiry

Companies related to enquiries can be edited from the *Enquiry* screen.

1. Display the relevant enquiry on the *Enquiry* screen
2. Tap the enquiry
3. Tap **Browse Company**

This will display the *Company Details* screen.

Make the required changes following the process described in the [‘Editing an Existing Company Record’](#) section in this document.

The following actions can also be carried out by tapping the relevant record on the *Enquiry* screen:

- [Add To-Do](#)
- [Add Note](#)
- View Related To-Dos – This will display all the to dos linked to the enquiry.

ADDING TO DOS

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

1. Tap the TO-DO's button in the footer of the *Home* screen

This will expand the side panel displaying all the to dos assigned to the logged in sales rep.

2. Tap the ADD NEW button

This will open the *Add To-Do* screen.

3. Enter a **Title** for the to do
4. Enter a description in the **Details** field
5. Select the relevant **Site**
6. Select the relevant customer **Contact**

By default, the to do will be assigned to the logged in sales rep. This can be changed, if required.

7. Select the enquiry this to do is linked to, from the **Enquiry** drop down list, if applicable
8. Select the note this item is linked to, from the **Note** drop down list, if applicable
9. Select the to do **Type**
10. Enter the estimated **Duration** for completing this to do
11. Enter the deadline in the **Due Date** and **Due Time** fields
12. Slide the **Calendar** toggle to the right if the to do is to be synced with the device calendar

Completing To Dos

1. Tap the TO-DO's button in the footer of the *Home* screen

This will expand the side panel displaying all the to dos assigned to the logged in sales rep.

2. Tap the relevant to do
3. Tap EDIT
4. Slide the **Completed** toggle to the right
5. Enter a note recording the outcome of the to do
6. Tap SAVE

Info: "Would you like to update the company last contacted date?"

Tapping YES will update the **Last Contacted** field in the *Company Details* grid of the *Company Master* screen in Baseplan Enterprise.

Tapping NO will return to the *Home* screen.

The to do will be saved.

Filtering To Dos

To dos displayed in the side panel can be filtered by:

- Company – All or Selected

Note: A company must be selected from the *Company* panel to use the 'Selected' option.

- Completed
- Uncompleted
- Assigned To Me
- Ordered By – Created Date or Due Date
- Order Type – Newest or Oldest
- Type

ADDING NOTES

1. On the *Company* panel, tap the relevant record
2. Tap the NOTES button in the footer of the *Home* screen

This will display all the notes entered for the company, in the *Notes* screen.

Notes can be filtered by site and creator.

3. Tap ADD NEW

This will open the *Add Note* screen.

4. Select the note **Type**

The current date and time will default in the **Date** field. This can be changed, if required.

5. Select the relevant customer **Contact**

6. Select the relevant customer **Site**

7. Select the **Enquiry** related to this note

8. Select the **To Do** that resulted in this note

9. Enter the **Details**

10. Tap SAVE

Info: "Would you like to update the company last contacted date?"

Tapping YES will update the **Last Contacted** field in the *Company Details* grid of the *Company Master* screen in Baseplan Enterprise.

Tapping NO will return the sales rep to the *Notes* screen.

Editing an Existing Note

1. Display the relevant note on the *Notes* screen
2. Tap the note to be edited
3. Tap EDIT
4. Make the required changes
5. Tap SAVE

Info: “Would you like to update the company last contacted date?”

Tapping YES will update the **Last Contacted** field in the *Company Details* grid of the *Company Master* screen in Baseplan Enterprise.

Tapping NO will return to the *Notes* screen.

The note will be saved.

ADDITIONAL FEATURES

Map

Map functionality can be used to view geolocations of companies, sites and related items, depending on the filtering criteria selected.

1. On the *Home* screen, tap the MAP button in the footer

The sales rep's current location will be pinned on the map.

All the company locations will be pinned as red buildings. Sites will be pinned as blue buildings.

Tapping any company or site building on the map will display the company/site name, address and phone number.

For company specific information, tap the relevant record on the *Company* panel and then tap the MAP button. This will pin locations of the selected company and linked sites on the map.

Map Filters

Geolocations of the following items can be viewed using the filters available:

- Active customers
- Active enquiries
- Active to dos

The *What to Show* section will contain the following options:

- Sites
- Companies
- All

Sliding the **Include Main Sites** toggle to the right will pin locations of main sites along with the other sites.

Sliding the **Pin My Location** toggle to the right will pin the sales rep's current location to the map.

Sales reps can also view the number of days since a company was last contacted by either note type or to do type. Checking the **Days since last contacted** checkbox, selecting either **Notes** or **To Dos** and then tapping DONE will display the number of days since a company was last contacted over the relevant location pins.

If **Sites** is selected in the *What to Show* section, then the **Days since last contacted** will be calculated using the most recent **Date Completed** for the to do related to a particular site.

If **Companies** is selected in the *What to Show* section, then the **Days since last contacted** will be calculated using the most recent **Date Completed** for the company (any site).

If **All** is selected in the *What to Show* section, then the **Days since last contacted** will be calculated for all the companies and sites, including the main sites (if the Include Main Sites function is enabled).

Customer Information

Potential customers (leads) are first created in CRM. After the relevant enquiries are won, these customers are created in the Customer Master and linked by a unique **Customer Code**.

The following can be viewed for customers that exist in the Customer Master (have a **Customer Code**):

- Rental History
- Owned Equipment
- Service History
- Transactions

Rental History

1. On the *Company* panel, tap the relevant record
2. Tap the HIRE button in the footer of the *Home* screen

This will display all rental contracts created for the customer.

Rental contracts can be filtered by **Status**.

3. To view further information, tap the relevant rental contract

This will display an overlay screen with all the detail lines from the selected contract.

4. Tap the relevant detail line

This will further drill down on the contract displaying key details of the rental detail lines.

Owned Equipment

Information related to equipment items owned by customers can be viewed in CRM Mobility by following the steps below:

1. On the *Company* panel, tap the relevant record
2. Tap the EQUIPMENT button in the footer of the *Home* screen

This will display all equipment items owned by the customer and available in the *Equipment Ledger* in Baseplan Enterprise.

3. Tap the relevant equipment item

This will display key details of the equipment item, such as Equipment Code, Make, Model, Branch, Category, Warranty, Freight Rate and more on a separate screen.

Service History

Service jobs created for customers in Baseplan Enterprise can be viewed in CRM Mobility.

1. On the *Company* panel, tap the relevant record
2. Tap the SERVICE button in the footer of the *Home* screen
3. Tap the relevant service job

Service jobs displayed can be filtered by **Service Date**. The available criteria are:

- Today
- Last 7 Days
- Last 14 Days
- Last 30 Days
- Last 100 Services

Transactions

Customer invoices created in Baseplan Enterprise can be viewed in CRM Mobility by following the steps below:

1. On the *Company* panel, tap the relevant record
2. Tap the TRANSACTION button in the footer of the *Home* screen

This will display all invoices created for the customer in Baseplan Enterprise, as per the filtering criteria selected.

Transactions can be filtered by **Invoice Type** and **Transaction Date**.

The available invoice types are:

- All
- Stock
- Cas. Docket – Casual Dockets
- MDOCK - Multi Line Dockets
- Rental
- Service
- Job Cost – Project Costing

The available **Transaction Date** filtering criteria options are:

- Today
- Last 7 Days
- Last 14 Days
- Last 30 Days
- Last 100 Services

KPI

Sales reps logged into CRM Mobility can get an overview of their activities using the KPI (Key Performance Indicators) functionality.

1. Tap the KPI button in the footer of the *Home* screen

This will display the *KPI Chart* screen.

A pie chart will depict the notes or to dos assigned to the sales rep based on the filters selected.

KPIs can be filtered by to dos and notes created during the entered date range, current week or next week. Once a KPI chart is generated, the adjoining grid shows the type and number of to dos or notes assigned to the sales rep.

Note: Company specific KPIs can be viewed by selecting a record from the *Company* panel and then tapping the KPI button.

Rates Calculator

Rental rates can be configured at the equipment, customer and location levels in the *Rates Maintenance* screen (**Rental > Configuration > Rental Rates**) in Baseplan Enterprise.

Please refer to the 'How to Use Rental Rates' guide for more information.

Rates configured in Baseplan Enterprise can be accessed from CRM Mobility. Enquiries can then be created directly using these rates.

1. On the *Company* panel, select the relevant record
2. Tap the SHORTCUT button in the footer of the *Home* screen
3. Tap **Rates Calculator**
4. Enter the Model Description of the relevant equipment item in the **Description** field

Model Description can be found on the *Equipment Ledger* screen in Baseplan Enterprise.

5. Select the relevant **Branch**
6. Tap SEARCH

This will display all the rental rates configured for the selected equipment item, branch and customer combination.

7. Tap the relevant rate detail line
8. Enter the **Quantity** of equipment items to be rented out at the given rate

47. Enter the rental **Duration**

48. Tap SAVE

This will create a new enquiry for the selected company.

Advanced Search

CRM records can be found by using the Advanced Search functionality.

1. Tap the ADVANCED SEARCH button at the top of the *Home* screen

The sales rep can search for:

- Company
- Contacts
- Rental
- Equipment
- Service

2. Select the relevant category

Companies can be searched by **Name, Street Address, Suburb, Postcode** and **Phone**

Contacts can be searched by **Name, Mobile, Phone** and **Direct Phone**

Rental information can be searched by **PO number, Hire Number** and **Plant No**

Equipment items can be searched by **Plant No, Serial No.** and **Registration Number**

Service jobs can be searched by **Job No, Hire No** and **Plant No**

3. Enter the search value

4. Tap SEARCH

This will display the results below the SEARCH button.

Tapping a result will display the information linked to the result on the relevant screen.

For example: Searching a company by **Suburb** 'NSW' will list all the companies from NSW. Tapping a result will display the company record on the *Company Details* screen.

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