CRMWeb Version 1.2

USER GUIDE

TABLE OF CONTENTS

About CRMWeb

CRMWeb is a web-based Customer Relationship Management solution which enables companies to efficiently organize, update, and manage information pertaining to all aspects of their business relations. CRMWeb can easily be integrated with customer specific applications.

Record Types

Below there is a list of the record types you can access and manage in CRMWeb Version 1.0.0:

- Accounts - information pertaining to customers, partners or competitors.
- Contacts - information about persons related to your accounts.
- Leads - information regarding your prospective customers.
- Opportunities – information on sales opportunities.
- Cases – description of customer problems, questions and feedback as well as solutions for the reported problems.
- Products – information related to your products.
- Documents – files relevant for your company's activity.
- Predefined reports – reports pertaining to various record types.
- Tasks – activities to be performed.
- Events – planned events.
- Notes – users' comments on various record types.
- Attachments – files attached to your records.

Facilities

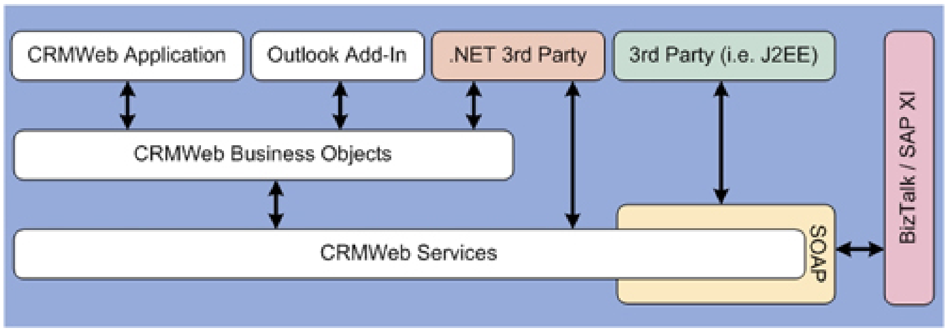
Here are some of the most important facilities available in CRMWeb Version 1.0.0:

- User Management
- Account Management
- Contact Management
- Lead Management
- Opportunity Management
- Case Management
- Product Management
- Document Management
- Task Management
- Event Management
- Predefined Reports
- Quick Create Record Facility
- Data Import
- Email and Mass Email Functionality
- Activity History Functionality
- Display Custom Record Views
- Search Functionality
- Attach Notes to Your Records
- Attach Files to Your Records
- Calendar Functionality

Technical Information

Integration

Based on an open architecture design and using the advantages offered by the .NET technology, CRMWeb is a robust, yet very flexible and easy to integrate CRM Solution. From the very beginning, starting with the design phase we made sure that the system can be easily expanded and integrated with other systems i.e. ERP Systems, Office Tools, Portals, Corporate Websites etc. while preserving its robustness at the same time.

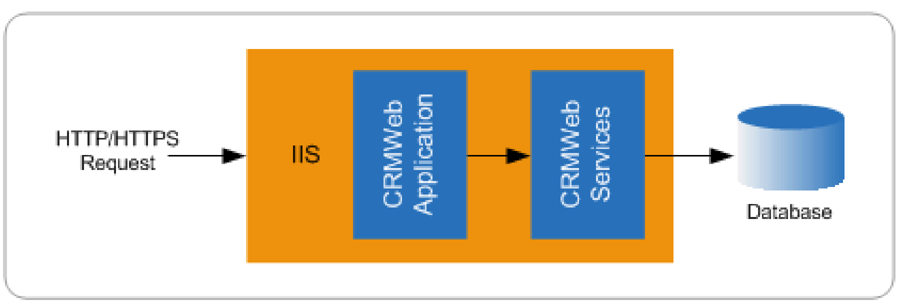


CRMWeb's flexible architecture allows a smooth integration with third-party applications regardless of the operating system, programming language or hardware platform.

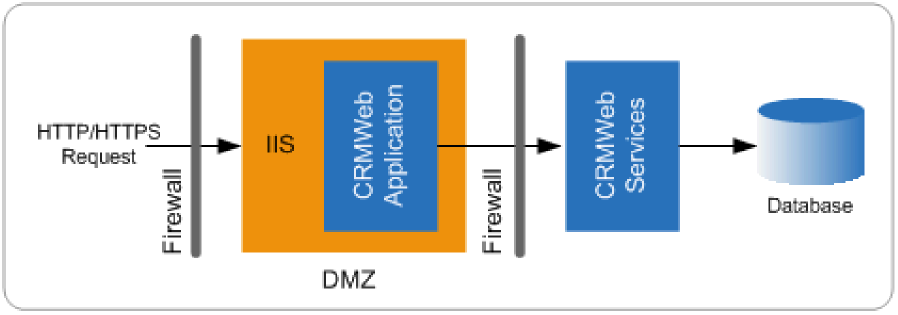
CRMWeb provides a set of flexible Web Services APIs based on standard protocols like XML, SOAP, and WSDL to enable custom integrations between CRMWeb and web services-compliant applications or integration platforms.

Deployment

CRMWeb will be up and running after an easy installation procedure requiring just some clicks. It fits both internet and intranet deployment scenarios.



CRMWeb Intranet Deployment Scenario



CRMWeb Internet Deployment Scenario

System Requirements

Server requirements:

- Microsoft Windows 2000 / Microsoft Windows XP Professional / Microsoft Windows 2003
- Microsoft Internet Information Services (IIS) server 5.0 or 6.0
- Microsoft .NET Framework 1.1
- Intel® Pentium® III 800-MHz or higher CPU
- 256 MB RAM (512 MB or more recommended)
- 512 MG to 1 GB of available hard disk space

Client requirements:

- Web browser (Internet Explorer 5 or greater, Mozilla 1.1, Netscape 6 or greater, Firefox)
- Super VGA (800 x 600) or higher-resolution video adapter and monitor

Using CRMWeb

Logging On

The system administrator creates an account for each user of the application. Each user will be assigned a username and a password. View **User Management** for more information.

To log in follow the next steps:

1. Enter your username.

2. Enter your password.

3. Press the **Logon** button.

IMPORTANT:

1. If you enter an incorrect username or password, an error message will be displayed. Passwords are case sensitive.

2. Depending on the browser you use, your system can remember your login data so you won't have to introduce your username and password every time you want to log in.

3. If you do not perform any activities for a period of time, the system will automatically log you out for security reasons. This has nothing to do with the application's functionality, but depends on your server's settings. Your system administrator can change the period of time or turn off this setting. When you are ready to resume working with the system, click on any button in the system. The login page will be displayed.

Logging Out

When you are finished working with the system, you should always log out rather than just close your web browser. When a user logs out, the system automatically returns the web browser window to the "Logon" screen.

To log out follow the next steps:

1. Click the **Sign Out** link button in the left sidebar under the current date, in the top left hand area of the screen.

2. Close the browser window.

Home Page

Overview

After pressing the **Logon** button in the **Log on** page as described under **Logging on**, the **Home Page** will be displayed. It contains an overview of upcoming events, of open and closed tasks, your monthly calendar. In this page you can create new records (accounts, contacts, leads, opportunities, tasks, products cases, documents and events), search your records, view and manage your events and tasks, view the calendar and access your records.

Sections

Left Sidebar

In the upper section of the left sidebar the current date and your name are displayed. The sidebar also allows you to perform the following actions:

1. Sign Out – By pressing the **Sign out** link-button you will be logged out of the system.

2. Search your records - The **Search Panel** allows you to search your leads, accounts, contacts, tasks and opportunities by name or subject and your documents by key words.

3. Create new records - The **Create Panel** contains a list of link-buttons that enable you to create new accounts, contacts, leads, tasks, opportunity, cases and documents. View the corresponding chapters for detailed information.

Using the Search Functionality:

To search your records, follow the next steps:

1. Select from the drop-down list available the category you would like to be searched: **Leads**, **Accounts, Contacts**, **Tasks, Documents** or **Opportunities**.

2. Enter your search term in the **Search** field.

3. Click **Search**.

The records containing the term you introduced will be displayed in the right side of the page.

IMPORTANT:

1. You can only select and search one category at one time.

2. When you are viewing the home page of one of the following record types: accounts, contacts, leads, opportunities, cases or products, the left side bar will be enhanced with the **Quick Create Record** facility which allows you to quickly add records.

Upper Tab Bar

In the right section of the window there is tab bar which allows you to access the corresponding records: **Home**, **Accounts**, **Contacts**, **Leads**, **Opportunities**, **Cases**, **Products**, **Reports** and **Documents**. By pressing one of these tabs you will be directed to the appropriate page.

Calendar

In this section you can view and manage your tasks and events as well as your calendar.

Events – By default the list of events for the current day will be displayed. You can edit existing events, create new events, delete events, or access event related information. You can also display your events for the current date, week or month by clicking on the following icons:

 - displays the events for the current day

 - displays the events for the current week

 - displays the events for the current month

Tasks – By default your tasks for the current day will be displayed. You can select another predefined list from the options available in the **View Tasks** drop-down list. You can also create new tasks, close open tasks, and delete existing tasks.

Calendar – By default the calendar for the current month with the current date highlighted will be displayed. You can display events for a specific date by clicking any date in the calendar, navigate through the calendar and view previous or coming months by clicking the **≤** respectively **≥** symbols.

Events

Options:

Events are scheduled activities (meetings, phone calls, emails etc.) which can be defined and tracked in the calendar section of the **Home Page**.

The events for the current day are displayed in anti-chronological order (with the most proximate one at the top of the list). If there are no events planned for a specific date, only the current date and the **New Event** button will be displayed.

The following pieces of information are provided in the event list: the time the event is due, the subject of the event, the record to which the event is related (this can be an account, a contact, a task, an opportunity or a case and can be set while the event is created).

IMPORTANT:

1. You can access the list of events scheduled for a specific date by selecting the respective date from the calendar displayed in the right area of the **Home Page**.

2. The event subject and the record the event is related to are displayed in the form of link-buttons which enable you to access the corresponding pages by clicking on them.

3. All future events are also listed in the section **Open Activities** of the record they are related to (contact, account, case, lead or opportunity).

4. Expired events are registered in the **Activity History** section of the record the respective events are related to.

5. Each event can be related to a maximum of two records (contact, lead, account, case or opportunity) which can be set while creating a new event.

Create a New Event

To create a new event press **New Event** and fill in the form displayed. The fields marked with * are compulsory and must be filled in. All other fields are optional and may be left blank.

After filling in the form, click **Save** to save the new event. You also have the following possibilities:

- **Save & New Task** - Save the event and create a new task.
- **Save & New Event** - Save the event and create a new event by clicking the button.

- **Cancel** - Return to the page you were previously viewing without saving the new event.

Event Fields

In the table below there is a list of all event fields and a short description for each field.

No.	Field	Description
	Event Information	
1.	**Assigned to**	Select the name of the user to whom you would like to assign the event by clicking on the icon (the system displays by default your name). Only team leaders can assign events to other users.
2.	**Subject**	Enter the subject of the event.
3.	**Related to**	Specify which contact or lead the event is related to. Select the desired type of record from the corresponding drop-down list and then select the appropriate item from the list displayed by clicking on the icon.
4.	**Related to**	Specify to which account, case or opportunity the event is related to. Select the desired type of record from the corresponding drop-down list and then select the appropriate item from the list displayed by clicking on the icon.
5.	**Private check-box**	Check the check-box if the event you want to create concerns your private life.
6.	**Location**	Specify where the event is going to take place.
7.	**Date**	Specify the date when the event is scheduled.
8.	**Time**	Specify the exact time the event is expected to take place.
9.	**Duration**	Specify the duration of the event by selecting the appropriate number of hours and minutes from the drop-down lists provided.
10.	**All day event**	Specify if the event is expected to take a whole day by checking the corresponding check-box.
11.	**Type**	Select the type of the event from the drop-down list provided.
	Description Information	
12.	**Description**	In this field you can enter a description of the new event.

Add an Event to a Record

You can add events for the following record types: accounts, contacts, leads, opportunities, cases.

To add an event for a specific record, follow the next steps:

1. Locate the record you would like to add an event for.

2. Click on its subject to display the detail page of that record.

3. In the **Open Activities** related list of that record click **Add Event.**

4. Fill in the form displayed.

5. Click **Save**.

View an Event

You can view a specific event by clicking on its subject. This will display the **Event** detail page which contains standard event information and where you can perform the following actions:

- Edit the event.
- Delete the event.
- Create a follow-up task.
- Create a follow-up event.

Edit an Event

To edit an event, locate the event you would like to edit, click on its subject, press **Edit** in the event detail page, modify the information you would like to update and/or enter any additional information and then click **Save.**

Create a Follow-up Task

To create a follow-up task for an event, locate the event, click on its subject, press **Create Follow-up Task**, fill in the form displayed and click **Save**.

Create a Follow-up Event

To create a follow-up event for an event, locate the event, click on its subject, press **Create Follow-up Event**, fill in the form displayed and click **Save**.

Delete an Event

To delete an event, locate the event you would like to delete, click on its subject and then click **Delete** in the event detail page. Before actually deleting the event, a message will be displayed asking you if you really want to delete the event. Pressing **Yes** will remove the event from the database.

Tasks

Options:

Tasks are planed activities which you can handle yourself or assign to others if you are a team leader. Your tasks are listed and can be managed in the **Calendar** section of the **Home Page**.

By default your tasks for the current day will be displayed. You can select another predefined list from the options available in the **View Tasks** drop-down list. For instance, you can display all open tasks or only tasks scheduled for the current month etc.

The following pieces of information are provided for each task in the task list: status (which can be open or closed), the subject of the task, the record the task is related to (this can be an account, a contact, a task, an opportunity or a case and can be set while the task is created) and the date the task is scheduled for.

IMPORTANT:

1. Expired tasks are highlighted with red.

2. The sign **X** shown in the first column indicates that the task is still open. Clicking on the **X** sign will automatically close the task. For closed tasks no information is provided in the first column.

3. The task subject and the record the task is related to are displayed in the form of link-buttons which enable you to access the corresponding pages by clicking on them.

4. All open tasks are also listed in the section **Open Activities** of the record they are related to (contact, account, case, lead or opportunity).

5. Closed tasks are registered in the **Activity History** section of the record the respective tasks are related to.

6. Each task can be related to a maximum of two records (contact, lead, account, case or opportunity) which can be set while creating a new task.

Create a New Task

To create a new task press **New** in the **Tasks** bar in the **Calendar** section of the **Home Page** and fill in the form displayed. The fields marked with ***** are compulsory and must be filled in. All other fields are optional and may be left blank.

After filling in the form, click **Save** to save the new task. You also have the following possibilities:

- **Save & New Task** - Save the task and create a new task.
- **Save & New Event** - Save the task and create a new event.
- **Cancel** - Return to the page you were previously viewing without saving the new task.

You can also create a new task by clicking the **Task** link button in the **Create** panel in the left side area of the window.

Task Fields

No.	Field	Description
Task Information		
1.	**Assigned to**	Select the name of the user to whom you would like to assign the task by clicking on the icon (the system displays by default your name). Only team leaders can assign tasks to other users.
2.	**Subject**	Enter the subject of the task.
3.	**Due date**	Enter the date the task is supposed to be carried out.
4.	**Priority**	Set the priority level of a task by selecting one of the options provided in the corresponding drop-down list.
5.	**Status**	Select the status of the task from the drop-down list.
6.	**Related to**	Specify which contact or lead the task is related to. Select the desired type of record from the corresponding drop-down list and then select the appropriate item from the list displayed by clicking on the icon.
7.	**Related to**	Specify which account, case or opportunity the task is related to. Select the desired type of record from the corresponding drop-down list and then select the appropriate item from the list displayed by clicking on the icon.
8.	**Type**	Select the type of the task from the drop-down list provided.
Description Information		
12.	**Description**	In this field you can enter a description of the new task.
Notification Email		
13.	**Send notification mail**	If you are a team leader and you are assigning a task to another team member you can choose to send a notification mail by checking the corresponding check-box. You can also send notification mails to yourself when you are assigning tasks to you.

Add a Task to a Record

You can add tasks for the following record types: accounts, contacts, leads, opportunities, cases.

To add a task for a specific record, follow the next steps:

6. Locate the record you would like to add a task for.

7. Click on its subject to display the detail page of that record.

8. In the **Open Activities** related list of that record click **Add Task.**

9. Fill in the form displayed.

10. Click **Save**.

View a Task

You can view a specific task by clicking on its subject. This will display the **Task** detail page which contains standard task information and where you can perform the following actions:

- Edit the task.
- Delete the task.
- Create a follow-up task.
- Create a follow-up event.

Edit a Task

To edit a task, locate the task you would like to edit, click on its subject, press **Edit** in the task detail page, modify the information you would like to update and/or enter any additional information and then click **Save.**

Create a Follow-up Task

To create a follow-up task for a task, locate the task, click on its subject, press **Create Follow-up Task**, fill in the form displayed and click **Save**.

Create a Follow-up Event

To create a follow-up event for a task, locate the task, click on its subject, press **Create Follow-up Event**, fill in the form displayed and click **Save**.

Close a Task

To close a task, locate the task you would like to close in one of the available task lists and then click on the **X** sign. This will automatically close the task which will now be available in the **Activity History** of the record it was related to.

You can also close a task by changing its status into **Completed**. Locate the task you would like to close, click **Edit** and then select the option **Completed** from the dropdown list displayed. Click **Save** to save the changes.

Delete a Task

To delete a task, locate the task you would like to delete, click on its subject and then click **Delete** in the task detail page. Before actually deleting the task, a message will be displayed asking you if you really want to delete the task. Pressing **Yes** will remove the task from the database.

Accounts

Options:

- Display account views
- Define account views
- Edit account views
- Display an account
- Edit an account
- Create an account
- Delete an account
- Add a contact to an account
- Add an opportunity to an account
- Add an event related to an account
- Add a task related to an account
- Add a performed activity to an account
- Add a note to an account
- Attach a file to an account
- Send an email to contacts related to an account
- Specify that an account is a subsidiary
- Change the owner of an account
- Import accounts from external sources

What is an Account?

An account is a company or an organization related to your business such as a customer, a partner or a competitor.

Accounts can be imported from external sources by using the import function of the system (see **Import Data** for detailed information), or can be entered manually as described under **Create New Account.**

Each account has a detail page which stores information like company name, contact details, type, industry etc. as well as all related contacts, opportunities, open activities, past interactions, cases, documents and notes. To access a detail page of a specific account, locate the account in one of the available account lists and press the corresponding link button.

Accounts Home Page

Pressing the **Accounts** tab from the tab bar will display the accounts home page where your accounts are listed. In this page you can filter and sort your accounts by using predefined and user-defined views. In addition you can edit individual accounts, delete existing accounts, view detailed account information, access related information (i.e. web pages) as well as add new accounts.

Select a view from the drop-down list to jump to that list page or click **Create New View** to define a custom view. Press **[<<previous]** and **[next>>]** from the end of the list to navigate through the account list.

To view an account, click on the account name. Click to update account information or to delete an account.

Under **Reports** click on the report you would like to display.

Under **Tools** click on **Import Accounts** and follow the steps described under **Import Data** to import accounts from external sources.

Account Views

Clicking the **Accounts** tab will display the default account view. You can select another predefined view from those available in the drop-down list, or define your own views in order to filter the accounts and display only accounts which fulfill the criteria selected. Once created, views can be edited or deleted later.

Display an account view - To display an existing account view, select it from the drop down-list available next to **Select View**.

Define an account view - To define a new account view, press **Create New View** and then follow the steps described in chapter **Create New View.**

Edit an account view - To edit an existing view, select the view you would like to edit from the drop-down list, click **Edit View**, modify the existing data or enter any additional information and then click **Save**.

View an Account

To display an account, click the corresponding link button in the Accounts home page. Account names are always given in the form of link buttons which means you can also access individual accounts at any place in the system by clicking the corresponding link button. For instance, when you are viewing an opportunity, a contact or a document you can access the related account by clicking on the account name.

The detailed account page consists of two main sections. In the upper section the standard account information is provided, that is information which you type in when you create an account, as well as the **Edit** and **Delete** buttons which you can use to update information in the account and respectively to delete the account. In the lower section there is a number of account related lists such as: contacts, opportunities, open activities, activity history, notes and attachments. Click on an individual item to view detailed information.

You can add new items (contacts, opportunities, tasks, events, completed activities, notes, and attachments) by clicking on the buttons provided next to the title of each list. Additionally you can send emails to an account directly from the individual account file by clicking **Send Email**. See **Send an Email** for more information. These emails are stored in the system and can be accessed at a later time.

Edit an Account

You have two possibilities to edit an account:

I. In the accounts home page:

1. Press the button next to the account you want to edit from the **Action** column.

2. Modify the information you want to update.

3. Click - **Save** to save the changes you have performed and return to the accounts page.
- **Save and New** to save the changes and create a new account.
- **Cancel** to return to the page you were previously viewing without saving the changes.

II. In the individual page of an account:

1. Press the **Edit** button situated at the end of the first section.

2. Modify the information you want to update.

3. Click - **Save** to save the changes you have performed and return to the accounts page.
- **Save and New** to save the changes and create a new account.
- **Cancel** to return to the page you were previously viewing without saving the changes.

Create a New Account

In order to create a new account press the **Account** button from the **Create** panel on the left-side of the window and fill in the form displayed. Fields marked with ***** are compulsory and must be filled in. All other fields are optional and may be left blank.

After filling in the required fields, press **Save** to save the new account and return to the accounts page, **Save and New** to save the account and create a new one or **Cancel** to return to the page you were previously viewing without saving the new account.

For larger companies you can specify the hierarchy by relating each subsidiary to the corresponding parent account. To specify that a company is a subsidiary of another company, click to select the appropriate parent account from the list of existing accounts.

You can also create a new account by filling in the fields under **Quick Create Account** in the **Quick Create** Panel and pressing **Save**. Only the account name must be entered, the two other fields are optional and may be left blank.

Account Fields

In the table below there is a list of all account fields and a short description for each field.

No.	Field	Description
	Account Information	
1.	**Account Owner**	This field is automatically filled in by the system with the name of the creator.
2.	**Account Name**	Type the name of the company or organization.
3.	**Parent Account**	Name of the parent company for subsidiaries or child organizations. The parent account must be an existing account. Use the button to select the parent account from the list displayed. Enter the account code.
4.	**Account Code**	Select the appropriate account type from the drop-

		down list available.
5.	**Type**	Select the industry from the drop-down list.
6.	**Industry**	Select the ownership type from the drop-down list provided.
7.	**Ownership**	Select the rating you consider appropriate.
8.	**Rating**	Introduce the primary phone number of the account.
9.	**Phone**	Introduce the primary fax number of the account.
10.	**Fax**	Introduce the website of the account.
11.	**Website**	Introduce the annual revenue.
12.	**Annual Revenue**	Type in the number of people employed by the company.
13.	**Number of Employees**	Introduce the Standard Industrial Classification code of the company.
14.	**SIC Code**	
Address Information - Billing Address Section for the company's address which you normally use for billing.		
15.	**Billing Street**	Enter the street name.
16.	**Billing City**	Enter the city.
17.	**Billing State**	Enter the appropriate territorial-administrative division (state, county etc.) of the account.
18.	**Billing ZIP/Postal Code**	Enter the Zone Improvement Plan Code or the Postal Code.
19.	**Billing Country**	Enter the country the company/organization is located in.
Address Information - Shipping Address Section for the company's address you normally use for shipping.		
20.	**Shipping Street**	Enter the street name.
21.	**Shipping City**	Enter the city.
22.	**Shipping State**	Enter the appropriate territorial-administrative division (state, county etc.) of the account.
23.	**Shipping ZIP/Postal**	Enter the Zone Improvement Plan Code or the Postal Code.
24.	**Code Shipping Country**	Enter the country the company/organization is located in.
Description Information		
25.	**Description**	In this field you can enter a description of the account, notes or key-words relevant for the account. The data in this field can be used when you filter your accounts. View **Filter Conditions** for more information.

IMPORTANT:

1. If you use the same address for both shipping and billing click the **Copy billing to shipping** button. This automatically fills in the shipping section by populating the fields with the information provided in the billing section.

Delete an Account

You have two possibilities to delete an account:

1. When you are viewing the Accounts home page, press the  button next to the account you want to delete from the **Action** column. Before actually removing the account from the data base, the system will ask you if you really want to delete the account. By pressing **Yes** the account will be deleted from the data base.

2. When you are viewing an account, press the **Delete** button situated at the end of the first section. Before actually removing the account from the data base, the system will ask you if you really want to delete the account. By pressing **Yes** the account will be deleted from the database.

Contacts

Options:

Display contact views
Define contact views
Edit contact views
Display a contact
Edit a contact
Create a contact
Delete a contact
Clone a contact
Add an event related to a contact
Add a task related to a contact
Add a performed activity to a contact
Add a note to a contact
Attach a file to a contact
Send an email to a contact
Send an email to a list of contacts
Change the owner of a contact
Import contacts from external sources

What is a Contact?

A contact is a person related somehow to your accounts.

Contacts can be imported from external sources by using the import function of the system (see **Import Data** for detailed information), or can be entered manually as described under **Create New Contact.**

Each contact has a detail page where you can store information like name, contact details, account to which it is related, etc. as well as all related open activities, past interactions, documents and notes. To access the detail page of a specific contact, locate the contact in one of the available contact lists and press the corresponding link button.

Contacts Home Page

Pressing the **Contacts** tab from the tab bar will display the contacts home page where your contacts are listed. In this page you can filter and sort your contacts by using pre-defined and user-defined views. In addition you can edit individual contacts, delete existing contacts, view detailed contact information, add new contacts as well as clone existing contacts.

Select a view from the drop-down list to jump to that list page or click **Create New View** to define a custom view. Press **[<<previous]** and **[next>>]** from the end of the list to navigate through the contact list.

To view a contact, click on the contact name. Click to update contact information or to delete a contact.

Under **Reports** click on the report you would like to display.

Under **Tools** click on **Mass Email Contacts** and follow the steps described under **Sending Mass Emails** to send an email to multiple contacts or **Import Contacts** and follow the steps described under **Import Data** to import contacts from external sources.

Contact Views

Clicking the **Contacts** tab will display the default contact view. You can select another predefined view from those available in the drop-down list, or define your own views in order to filter the contacts and display only contacts which fulfill the criteria selected. Once created, views can be edited or deleted later.

Display a contact view - To display an existing contact view, select it from the drop down-list available next to **Select View**.

Define a contact view - To define a new contact view, press **Create New View** and then follow the steps described in the chapter **Create New View**.

Edit a contact view - To edit an existing view, select the view you would like to edit from the drop-down list, click **Edit View**, modify the existing data or enter any additional information and then click **Save**.

View a Contact

To display a contact, click the corresponding link button in the **Contacts** home page. Contact names are always given in the form of link buttons which means you can access individual contact files at any place in the system by clicking the corresponding link button. For instance, when you are viewing an account, a case or a document you can access the related contact by clicking on the **contact name**.

The **detailed contact page** consists of two main sections. In the upper section the standard contact information is provided, that is information which you enter when you create a contact, as well as the **Edit** and **Delete** buttons which you can use to update information related to the contact and respectively to delete the contact. In the lower section there is a number of contact related lists such as: open activities, activity history, notes and attachments. Click on an individual item to view detailed information.

You can add new items (tasks, events, performed activities, notes, and attachments) by clicking on the buttons provided next to the title of each list. Additionally you can send emails to a contact directly from the individual contact file by clicking **Send Email**. See **Send an Email** for more information. These emails are stored in the **Activity History** list and can be accessed at a later time.

Edit a Contact

You have two possibilities to edit a contact:

I. In the **contacts** home page:

1. Press the  button of the contact you want to edit from the **Action** column.

2. Modify the information you want to update.

3. Click - **Save** to save the changes you have performed and return to the contacts page.
- **Save and New** to save the changes and create a new contact.
- **Cancel** to return to the page you were previously viewing without saving the changes.

II. In the individual page of a contact:

1. Press the **Edit** button situated at the end of the first section.

2. Modify the information you want to update.

3. Click - **Save** to save the changes you have performed and return to the contacts page.
- **Save and New** to save the changes and create a new contact.
- **Cancel** to return to the page you were previously viewing without saving the changes.

Create a New Contact

In order to create a new contact press the **Contact** button from the **Create** panel on the left side of the window and fill in the form displayed. Fields marked with * are compulsory and must be filled in. All other fields are optional and may be left blank.

After filling in the required fields, press **Save** to save the new contact and return to the contacts page, **Save and New** to save the contact and create a new one or **Cancel** to return to the page you were previously viewing without saving the new contact.

You can also create a new contact by filling in the fields under **Quick Create Contact** in the **Quick Create** Panel and pressing **Save**. Only the contact name must be entered, the other fields are optional and may be left blank. The contact can be edited later.

In the **Contact** related list of an account you can create a new contact associated with that specific account by pressing **New** and filling in the form displayed.

Contact Fields

In the table below there is a list of all contact fields and a short description for each field.

No.	Field	Description
	Contact Information	
1.	**Contact Owner**	This field is automatically filled in by the system.
2.	**Salutation**	Select from the drop-down list provided the appropriate title for addressing the contact.
3.	**First Name**	Enter the contact's first name.
4.	**Last Name**	Type the contact's last name.
5.	**Account**	Select the name of the account the contact is related to using the icon.
6.	**Title**	Type the contact's position within the company.

7.	**Department**	Department of the company the contact belongs to.
8.	**Birth date**	Enter the contact's birthday. You can either type the date in the format accepted by the system and specified next to this field, or select it from the calendar by clicking on the icon.
9.	**Reports To**	Select the contact's direct manager from the list using the icon.
10.	**Lead Source**	Select the source of the contact from the drop-down list available.
11.	**Previous Company**	Enter the name of the company the contact was previously working in.
12.	**Phone**	Enter the contact's phone number.
13.	**Home Phone**	Enter the contact's home phone number.
14.	**Mobile**	Enter the contact's mobile phone number.
15.	**Fax**	Introduce the fax number of the contact.
16.	**Email**	Enter the contact's email address. It must be a valid email address in the form name@company.com. If you click on the email address you can send emails using the email application which runs on your computer, but this kind of emails will not be recorded as a performed activity in the contact's **Activity History** list.
17.	**Assistant**	Enter the name of the contact's assistant.
18.	**Asst. Phone**	Enter the phone number of the contact's assistant.
19.	**Email Opt Out**	Checking this box means that no mass emails will be sent to this contact.
20.	**Do Not Call**	Checking this box means that the contact doesn't want to be contacted via telephone.
21.	**Opinion of our company**	Select from the drop-down list available the most suitable option.
Address Information - Mailing Address Section for the contact's address which you normally use for mailing.		
22.	**Mailing Street**	Enter the street name of the mailing address.
23.	**Mailing City**	Enter the city for the mailing address.
24.	**Mailing State**	Enter the appropriate territorial-administrative division (state, county etc.) of the contact.
25.	**Mailing ZIP / Postal Code**	Enter the Zone Improvement Plan Code or the Postal Code.
26.	**Mailing Country**	Introduce the country for the contact's additional address.
Address Information - Other Address Section for the contact's additional address.		
27.	**Other Street**	Enter the street name of the additional address for the contact.
28.	**Other City**	Enter the city of the additional address.
29.	**Other State**	Enter the state of the additional address.
30.	**Other ZIP/Postal**	Enter the Zone Improvement Plan Code or the Postal Code for the additional address.

31.	**Other Country**	Introduce the country for the contact's additional address.
Description Information		
32.	**Description**	In this field you can enter a description of the contact. The data in this field can be used when you filter your contacts. View **Filter Conditions** for more information.

IMPORTANT:

1. Use the **Copy Mailing to Other** button if the mailing address and the additional address are identical. This automatically fills in the **other** section by populating the fields with the information provided in the **mailing** section.

Clone a Contact

To clone a contact press the **Clone** button situated at the end of the first section. This will automatically create a new contact with the same information as the existing contact. Change the existing information, enter any additional data for the new contact and then click **Save**.

This action is helpful when you need to create more contacts for the same account because it saves time and reduces your effort.

Send an Email to a Contact

You can send a contact emails which will be stored in the **Activity History** list directly from the detail page of that contact by clicking **Send an Email** and following the steps described under **Send an Email**.

Delete a Contact

You have two possibilities to delete a contact:

1. When you are viewing the **Contacts** home page, press the button next to the contact you want to delete from the **Action** column. Before actually removing the contact from the data base, the system will ask you if you really want to delete the contact. By pressing **Yes** the contact will be deleted from the database.

2. When you are viewing a contact, press the **Delete** button situated at the end of the first section. Before actually removing the contact from the database, the system will ask you if you really want to delete the contact. By pressing **Yes** the contact will be deleted from the data base.

Leads

Options:

What is a Lead?

A lead is a potential customer or opportunity (it can be an individual who sent you a request for a quote, a person you met at a fair or a person who expressed his/her interest in your products or services by phone, email, mail, fax, in a personal conversation, by filling out a form on your website etc.).

Each lead has a detail page in which you can store information like company name, contact details, type, industry etc. as well as related tasks, events, open activities, past interactions, associated attachments and notes. To access a detail page of a specific lead, locate the lead in one of the available lead lists (views) and press the corresponding link button.

Leads can be imported from external sources by using the import function of the system (see **Import Data** for detailed information), or can be entered manually as described under **Create New Lead.**

Leads Home Page

Pressing the **Leads** tab from the tab bar will display the leads home page where your leads are listed. In this page you can filter and sort your leads by using pre-defined and user-defined views. In addition you can edit individual leads, delete existing leads, view detailed lead information, add new leads, clone existing leads, as well as convert existing leads.

Select a view from the drop-down list to jump to that list page or click **Create New View** to define a custom view. Press **[<<previous]** and **[next>>]** from the end of the list to navigate through the lead list.

To view a lead, click on the lead name. Click to update lead information or to delete a lead.

Click **Check All** to check all leads of the displayed view, **Delete Selected** to delete all selected items or **Clear All** to uncheck them.

Under **Reports** click the report you would like to display.

Under **Tools** click:

1. Mass Email Leads and follow the steps described under **Sending Mass Emails** to send an email to multiple leads.

2. Import Leads and follow the steps described under **Import Data** to import leads from external sources.

Lead Views

Clicking the **Leads** tab will display the default lead view. You can select another predefined view from those available in the drop-down list, or define your own views in order to filter the leads and display only leads which fulfill the criteria selected. Once created, views can be edited or deleted later.

Display a lead view - To display an existing lead view, select it from the drop down-list available next to **Select View**.

Define a lead view - To define a new lead view, press **Create New View** and then follow the steps described under **Create New View**.

Edit a lead view - To edit an existing view, select the view you would like to edit from the drop-down list, click **Edit View**, modify the existing data or enter any additional information and then click **Save**.

View a Lead

To display a lead, click the corresponding link button in the **Leads** home page. Lead names are always given in the form of link buttons which means you can also access individual lead files at any place in the system by clicking the corresponding link button. For instance, when you are viewing a document you can access the related lead by clicking on the **lead name**.

The **detailed lead page** consists of two main sections. In the upper section the standard lead information is provided, that is information which you enter when you create a lead, as well as the **Edit** and **Delete** buttons which you can use to update information related to the lead and respectively to delete the lead. In the lower section there is a number of lead related lists such as: tasks, events, activity history, notes and attachments. Click on an individual item to view detailed information.

You can add new items (tasks, events, performed activities, notes, and attachments) by clicking on the buttons provided next to the title of each list. Additionally you can send emails to a lead directly from the individual lead file by clicking **Send Email**. See **Send an Email** for more information. These emails are stored in the **Activity History** list and can be accessed at a later time.

Edit a Lead

You have two possibilities to edit a lead:

I. In the **Leads** home page:

1. Press the button of the lead you want to edit from the **Action** column.

2. Modify the information you want to update.

3. Click - **Save** to save the changes you have performed and return to the leads page.
- **Save and New** to save the changes and create a new lead.
- **Cancel** to return to the page you were previously viewing without saving the changes.

II. In the individual page of a lead:

1. Press the **Edit** button situated at the end of the first section.

2. Modify the information you want to update.

3. Click - **Save** to save the changes you have performed and return to the leads page.
- **Save and New** to save the changes and create a new lead.
- **Cancel** to return to the page you were previously viewing without saving the changes.

Create a New Lead

In order to create a new lead press the **Lead** button from the **Create** panel on the left side of the window and fill in the form displayed. Fields marked with ***** are compulsory and must be filled in. All other fields are optional and may be left blank.

After filling in the required fields, press **Save** to save the new lead and return to the leads home page, **Save and New** to save the lead and create a new one or **Cancel** to return to the page you were previously viewing without saving the new lead.

You can also create a new lead by filling in the fields under **Quick Create Lead** in the **Quick Create** Panel and pressing **Save**.

Only the lead's last name must be entered, the other fields are optional and may be left blank. The lead can be edited later.

Lead Fields

In the table below there is a list of all contact fields and a short description for each field.

No.	Field	Description
Lead Information		
1.	**Lead Owner**	This field is automatically filled in by the system with your name.
2.	**Salutation**	Select from the drop-down list provided the appropriate title for addressing the lead.

3.	**First Name**	Enter the lead's first name.
4.	**Last Name**	Type the lead's last name.
5.	**Company**	Type the name of the company the lead is employed with.
6.	**Title**	Type the lead's position within the company.
7.	**Lead Source**	Select the appropriate lead source from the drop-down list available.
8.	**Industry**	Select the lead's industry from the drop-down list.
9.	**Annual Revenue**	Introduce the company's annual revenue.
10.	**Number of Employees**	Type the number of people employed by the company.
11.	**Lead status**	Select the appropriate status for the lead.
12.	**Rating**	Select the rating you consider appropriate.
13.	**Phone**	Introduce the primary phone number of the lead.
14.	**Mobile**	Enter the lead's mobile phone number.
15.	**Fax**	Introduce the primary fax number of the account.
16.	**Email**	Enter the lead's email address.
17.	**Website**	Introduce the website of the lead.
18.	**Email Opt Out**	Checking this box means that no mass emails will be sent to this lead.
19.	**Do Not Call**	Checking this box means that the lead doesn't want to be contacted via telephone.
Address Information Section for the lead's address.		
20.	**Street**	Enter the street name.
21.	**City**	Enter the city.
22.	**State**	Enter the appropriate territorial-administrative division (state, county etc.) the lead is located in.
23.	**ZIP / Postal Code**	Enter the Zone Improvement Plan Code or the Postal Code.
24.	**Country**	Introduce the country the company/organization is located in.
Description Information		
25.	**Description**	In this field you can enter a description of the lead. The data in this field can be used when you filter your leads. View **Filter Conditions** for more information.

Clone a Lead

To clone a lead press the **Clone** button situated at the end of the first section in the detail page of a lead. This will automatically create a new lead with the same information as the existing lead. Change the existing information, enter any additional data for the new lead and then click **Save**.

This action is helpful when you need to create more leads with the same information because it saves time and reduces your effort.

Convert a Lead

Leads can be converted into contacts. During the conversion you can specify if you would like to create a new account and/or an opportunity for the new contact. To convert a lead, follow the next steps:

1. Locate the lead you would like to convert, click **View** and then press **Convert**. In the first section of the **Convert Lead** page, under **New Contact,** there are three fields automatically filled in by the system with information from the lead: **First Name**, **Last Name** and **Email**. Fill in the first and the third fields if there is no data available. You may also leave them blank.

2. The box next to **New Account** is checked by default. This means a new account will be created for the contact. Enter the appropriate information in the fields provided if they are not already filled in with information from the lead. Uncheck the box if you do not want to create a new account and the fields will be hidden.

3. Check the box next to **New Opportunity** if you want to create a new opportunity and then fill in the fields displayed.

4. Click **Convert**.

IMPORTANT:

1. After the lead conversion, open activities and past interactions **Activity History** from the lead are annexed to the new records created (account, contact and opportunity).

2. Standard lead fields like: name, phone, fax, website, address fields etc. and values from the drop down lists are automatically transferred to the new records.

3. The lead's **Company Name** will be transferred to the **Account Name**.

4. If an account with the same name already exists the information will not be updated (over-written) and you won't be able to create a new account. In this case you may have to uncheck the **New Account** check box.

Send an Email to a Lead

You can send a lead emails which will be stored in the **Activity History** list directly from the detail page of that lead by clicking **Send an Email** and following the steps described under **Send Email**.

Delete a Lead

You have two possibilities to delete a lead:

1. When you are viewing the **Leads** home page, press the button next to the lead you want to delete from the **Action** column. Before actually removing the lead from the data base, the system will ask you if you really want to delete the lead. By pressing **Yes** the lead will be deleted from the database.

2. When you are viewing a lead, press the **Delete** button situated at the end of the first section. Before actually removing the lead from the database, the system will ask you if you really want to delete the lead. By pressing **Yes** the lead will be deleted from the database.

Opportunities

Options:

What is an Opportunity?

Opportunities are pending sales or deals which you want to track. Opportunities can be related to accounts.

Each opportunity has a detail page in which you can store information like opportunity name, account to which it is related, amount, close date, stage, probability to be transformed into a sale etc. as well as related tasks, events, open activities, past interactions and notes. To access a detail page of a specific opportunity, locate the opportunity in one of the available opportunity lists (views) and press the corresponding link button.

Opportunities Home Page

Pressing the **Opportunities** tab from the tab bar will display the opportunities home page where your opportunities are listed. In this page you can filter and sort your opportunities by using pre-defined and user-defined views. In addition you can edit individual opportunities, delete existing opportunities, view detailed opportunity information and add new opportunities.

Select a view from the drop-down list to jump to that list page or click **Create New View** to define a custom view. Press **[<<previous]** and **[next>>]** from the end of the list to navigate through the lead list.

To view an opportunity, click on the opportunity name. Click to update opportunity information or to delete an opportunity.

Under **Reports** click on the report you would like to display.

Opportunity Views

Clicking the **Opportunities** tab will display the default opportunity view. You can select another predefined view from those available in the drop-down list, or define your own views in order to filter the opportunities and display only opportunities which fulfill the criteria selected. Once created, views can be edited or deleted later.

Display an opportunity view - To display an existing opportunity view, select it from the drop down-list available next to **Select View**.

Define an opportunity view - To define a new opportunity view, press **Create New View** and then follow the steps described under **Create New View**.

Edit an opportunity view - To edit an existing view, select the view you would like to edit from the drop-down list, click **Edit View**, modify the existing data or enter any additional information and then click **Save**.

View an Opportunity

To display an opportunity, click the corresponding link button in the **Opportunities** home page. Opportunity names are always given in the form of link buttons which means you can also access individual opportunity files at any place in the system by clicking the corresponding link button. For instance, when you are viewing an account you can access the related opportunity by clicking on the **opportunity name**.

The **detailed opportunity page** consists of two main sections. In the upper section the standard opportunity information is provided, that is information which you enter when you create an opportunity, as well as the **Edit** and **Delete** buttons which you can use to update opportunity information and respectively to delete the opportunity. In the lower section there is a number of opportunity related lists such as: tasks, events, activity history and notes. Click on an individual item to view detailed information.

You can add new items (tasks, events, performed activities and notes) by clicking on the buttons provided next to the title of each list. Additionally you can send emails to an opportunity directly from the individual opportunity file by clicking **Send Email**. See **Send an Email** for more information. These emails are stored in the **Activity History** list and can be accessed at a later time.

Edit an Opportunity

You have two possibilities to edit an opportunity:

I. In the **Opportunities** home page:

1. Press the  button of the opportunity you want to edit from the **Action** column.

2. Modify the information you want to update.

3. Click - **Save** to save the changes you have performed and return to the opportunities page.
- **Save and New** to save the changes and create a new opportunity.
- **Cancel** to return to the page you were previously viewing without saving the changes.

II. In the individual page of an opportunity:

1. Press the **Edit** button situated at the end of the first section.

2. Modify the information you want to update.

3. Click - **Save** to save the changes you have performed and return to the opportunities page.
- **Save and New** to save the changes and create a new opportunity.
- **Cancel** to return to the page you were previously viewing without saving the changes.

Create a New Opportunity

In order to create a new opportunity press the **Opportunity** button from the **Create** panel on the left side of the window and fill in the form displayed. Fields marked with ***** are compulsory and must be filled in. All other fields are optional and may be left blank.

After filling in the required fields, press **Save** to save the new opportunity and return to the opportunities home page, **Save and New** to save the opportunity and create a new one or **Cancel** to return to the page you were previously viewing without saving the new opportunity.

You can also create a new opportunity by filling in the fields under **Quick Create Opportunity** in the **Quick Create** Panel and pressing **Save**. **Name**, **Account** and **Close Date** are mandatory and must be filled in, the other fields are optional and may be left blank. The opportunity can be edited later.

In the **Opportunities** related list of an account you can add a new opportunity related to that specific account by pressing **New** and filling in the form displayed.

Opportunity Fields

In the table below there is a list of all opportunity fields and a short description for each field.

No.	Field	Description
Opportunity Information		
1.	**Opportunity Owner**	This field is automatically filled in by the system with the name of the creator.
2.	**Opportunity Name**	Enter the name of the opportunity.
3.	**Account Name**	Type the name of the account the opportunity is associated to.
4.	**Type**	Select the appropriate opportunity type from the drop-down list provided.
5.	**Lead Source**	Select the appropriate lead source from the drop-down list available.
6.	**Amount**	Type the total amount of the sale.
7.	**Close Date**	Select the date you plan to close the opportunity by clicking on the calendar icon.
8.	**Stage**	Select the current stage of the opportunity from the

		drop-down list available.
9.	**Probability**	The probability of closing the opportunity expressed as a percentage.
10.	**Next Step**	Select the next step in closing the opportunity.
Additional Information		
11.	**Product**	Select the product the opportunity refers to from the drop-down list.
12.	**Main competitor**	Enter the name of your main competitor.
13.	**Number of licenses**	If appropriate, enter the number of product licenses you expect to sell.
Description Information		
14.	**Description**	In this field you can enter a description of the opportunity. The data in this field can be used when you filter your accounts. View **Filter Conditions** for more information.

Send an Email to an Opportunity

You can send an opportunity emails which will be stored in the **Activity History** list directly from the detail page of that opportunity by clicking **Send an Email** and following the steps described under **Send an Email**.

Delete an Opportunity

You have two possibilities to delete an opportunity:

1. When you are viewing the **Opportunities** home page, press the button next to the opportunity you want to delete from the **Action** column. Before actually removing the opportunity from the database, the system will ask you if you really want to delete the opportunity. By pressing **Yes** the opportunity will be deleted from the database.

2. When you are viewing an opportunity, press the **Delete** button situated at the end of the first section. Before actually removing the opportunity from the database, the system will ask you if you really want to delete the opportunity. By pressing **Yes** the opportunity will be deleted from the database.

Close an Opportunity

You have two possibilities to close an opportunity:

1.Identify the opportunity you would like to close in the opportunity list, click on its name and then click **Edit**. Select the appropriate option (**Closed Won** or **Closed Lost**) from the drop-down list next to **Stage** and then click **Save**.

2.Click next to the opportunity you would like to close. Select the appropriate option (**Closed Won** or **Closed Lost**) from the drop-down list next to **Stage** and then click **Save**.

Cases

Options:

What is a Case?

A case is a customer's question, problem or just feedback from your customers regarding products they purchased from you, services your company offers or billing issues. Cases are entered manually and their evolution is tracked from the moment they were reported until they are solved respectively closed. Cases can be used later to solve similar issues.

Each case has a detail page where you can store information like status, contact to which it is related, priority, case origin etc. as well as all related open activities, past interactions, documents and notes. To access the detail page of a specific case, locate the case in one of the available case lists and press the corresponding link button.

Cases Home Page

Pressing the **Cases** tab from the tab bar will display the cases home page where your cases are listed. In this page you can filter and sort your cases by using pre-defined and user-defined views. In addition you can edit individual cases, delete existing cases, view detailed case information, add new cases as well as clone existing cases.

Select a view from the drop-down list to jump to that list page or click **Create New View** to define a custom view. Press **[<<previous]** and **[next>>]** from the end of the list to navigate through the case list.

To view a case, click on the case subject. Click to update case information or to delete a case.

Under **Reports** click on the report you would like to display.

Case Views

Clicking the **Cases** tab will display the default case view. You can select another predefined view from those available in the drop-down list, or define your own views in order to filter the cases and display only cases which fulfill the criteria selected. Once created, views can be edited or deleted later.

Display a case view - To display an existing case view, select it from the drop down-list available next to **Select View**.

Define a case view - To define a new case view, press **Create New View** and then follow the steps described under **Create New View**.

Edit a case view - To edit an existing view, select the view you would like to edit from the drop-down list, click **Edit View**, modify the existing data or enter any additional information and then click **Save**.

View a Case

To display a case, click the corresponding link button in the **Cases** home page. Case subjects are always given in the form of link buttons which means you can also access individual case files at any place in the system by clicking the corresponding link button. For instance, when you are viewing a contact you can access the related case by clicking on the **case subject**.

The **detailed case page** consists of two main sections. In the upper section the standard case information is provided, that is information which you enter when you create a case, as well as the **Edit** and **Delete** buttons which you can use to update case information and respectively to delete the case. In the lower section there is a number of case related lists such as: open activities, activity history, notes and attachments. Click on an individual item to view detailed information.

You can add new items (tasks, events, performed activities, notes and attachments) by clicking on the buttons provided next to the title of each list. Additionally you can send emails to the contact respectively the lead which the case is related to directly from the individual case file by clicking **Send Email**. See **Send an Email** for more information. These emails are stored in the **Activity History** list and can be accessed at a later time.

Edit a Case

You have two possibilities to edit a case:

I. In the **Cases** home page:

1. Press the  button of the case you want to edit from the **Action** column.

2. Modify the information you want to update.

3. Click - **Save** to save the changes you have performed and return to the cases page.
- **Save and New** to save the changes and create a new case.
- **Cancel** to return to the page you were previously viewing without saving the changes.

II. In the individual page of a case:

1. Press the **Edit** button situated at the end of the first section.

2. Modify the information you want to update.

3. Click - **Save** to save the changes you have performed and return to the cases page.
- **Save and New** to save the changes and create a new case.
- **Cancel** to return to the page you were previously viewing without saving the changes.

Create a New Case

In order to create a new case press the **Case** button from the **Create** panel on the left side of the window and fill in the form displayed. Fields marked with ***** are compulsory and must be filled in. All other fields are optional and may be left blank.

After filling in the required fields, press **Save** to save the new case and return to the cases home page, **Save and New** to save the case and create a new one or **Cancel** to return to the page you were previously viewing without saving the new case.

You can also create a new case by filling in the fields under **Quick Create Case** in the **Quick Create** Panel and pressing **Save**.

Only the subject of the case must be entered, the other fields are optional and may be left blank. The case can be edited later.

Case Fields

In the table below there is a list of all case fields and a short description for each field.

No.	Field	Description
	Case Information	
1.	**Case Owner**	This field is automatically filled in by the system with the name of the creator.
2.	**Contact Name**	Select the name of the contact the case is associated to by using the icon.
3.	**Type**	Select the appropriate type for the new case from the drop-down list available.
4.	**Status**	Select the appropriate status (e.g. New) for the case from the drop-down list provided.
5.	**Priority**	Select the appropriate priority for the new case from the drop-down list available.
6.	**Case Origin**	Select the appropriate case origin from the drop-down list.
	Additional Information	
7.	**Product**	Select the product the case is associated to from the drop-down list.
8.	**Version**	Enter the version of the product the case is related to.
	Description Information	
9.	**Subject**	Enter the case's subject.

10.	**Description**	In this field you can enter a description of the opportunity. The data in this field can be used when you filter your accounts. View **Filter Conditions** for more information.
11.	**Resolution**	Enter the solution proposed for solving the case.

Clone a Case

To clone a case press the **Clone** button situated at the end of the first section in the detail page of a case. This will automatically create a new case with the same information as the existing case. Change the existing information, enter any additional data for the new case and then click **Save**.

This action is helpful when you need to create more cases with the same information because it saves time and reduces your effort.

Send an Email to a Contact

You can send the contact related with the case emails which will be stored in the **Activity History** list directly from the detail page of that case by clicking **Send an Email** and following the steps described under **Sending Emails.**

Delete a Case

You have two possibilities to delete a case:

1. When you are viewing the **Cases** home page, press the button next to the case you want to delete from the **Action** column. Before actually removing the case from the database, the system will ask you if you really want to delete the case. By pressing **Yes** the case will be deleted from the database.

2. When you are viewing a case, press the **Delete** button situated at the end of the first section. Before actually removing the case from the database, the system will ask you if you really want to delete the case. By pressing **Yes** the case will be deleted from the database.

Products

Options:

Display product views
Define product views
Edit product views
Display a product
Edit a product
Create a product
Delete a product
Attach a file to a product

What is a Product?

Products are items you sell. They can be related to opportunities.

Each product has a detail page where you can store information like product name, product code, description etc. as well as related documents. To access the detail page of a specific product, locate it in one of the available product lists and press the corresponding link button.

Products Home Page

Pressing the **Products** tab from the tab bar will display the products home page where your products are listed. In this page you can filter and sort your products by using pre-defined and user-defined views. In addition you can edit individual products, delete existing products, view detailed product information or add new products.

Select a view from the drop-down list to jump to that list page or click **Create New View** to define a custom view. Press **[<<previous]** and **[next>>]** from the end of the list to navigate through the product list.

To view a product, click on the product name. Click to update product information or to delete a product.

Product Views

Clicking the **Products** tab will display the default product view. You can select another predefined view from those available in the drop-down list, or define your own views in order to filter the products and display only product which fulfill the criteria selected. Once created, views can be edited or deleted later.

Display a product view - To display an existing product view, select it from the drop down-list available next to **Select View**.

Define a product view - To define a new product view, press **Create New View** and then follow the steps described in the section **Views** under **Create New View**.

Edit a product view - To edit an existing view, select the view you would like to edit from the drop-down list, click **Edit View**, modify the existing data or enter any additional information and then click **Save**.

View a Product

To display a product, click the corresponding link button in the **Products** home page. Product names are always given in the form of link buttons which means you can also access individual product files at any place in the system by clicking the corresponding link button. For instance, when you are viewing an opportunity you can access the related product by clicking on the **product name**.

The **detailed product page** consists of two main sections. In the upper section the standard product information is provided, that is information which you enter when you create a product, as well as the **Edit** and **Delete** buttons which you can use to update product information and respectively to delete the product. In the lower section under **Attachments** there is the list of product related documents. Click on an individual item to view detailed information.

You can add new items (attachments) by clicking on the button **Attach File** provided next to the title of the **Attachments** list.

Edit a Product

You have two possibilities to edit a product:

I. In the **Products** home page:

1. Press the  link button of the product you want to edit from the **Action** column.

2. Modify the information you want to update.

3. Click - **Save** to save the changes you have performed and return to the products page.
- **Cancel** to return to the page you were previously viewing without saving the changes.

II. In the individual page of a product:

1. Press the **Edit** button situated at the end of the first section.

2. Modify the information you want to update.

3. Click - **Save** to save the changes you have performed and return to the products page.
- **Cancel** to return to the page you were previously viewing without saving the changes.

Create a New Product

In order to create a new product press the **Product** button from the **Create** panel in the left side of the window and fill in the form displayed. Fields marked with ***** are compulsory and must be filled in. All other fields are optional and may be left blank.

After filling in the required fields, press **Save** to save the new product and return to the products home page, **Save and New** to save the product and create a new one or **Cancel** to return to the page you were previously viewing without saving the new product.

You can also create a new product by filling in the fields under **Quick Create Product** in the **Quick Create** Panel and pressing **Save**.

Only the name of the new product must be entered, the other fields are optional and may be left blank. The product can be edited later.

Product Fields

In the table below there is a list of all product fields and a short description for each field.

No.	Field	Description
Product Information		
1.	**Name**	Enter the name of the product.
2.	**Is Active**	Specify if the product is active or not. If the check box is checked, the product is active. Uncheck it if the product is not active (is not sold anymore).
3.	**Code**	Enter the code of the new product.
Description Information		
4.	**Description**	In this field you can enter a description of the product. The data in this field can be used when you filter your products. View **Filter Conditions** for more information.

Delete a Product

You have two possibilities to delete a product:

1. When you are viewing the **Products** home page, press the  button next to the product you want to delete from the **Action** column. Before actually removing the product from the database, the system will ask you if you really want to delete the product. By pressing **Yes** the product will be deleted from the database.

2. When you are viewing a product, press the **Delete** button situated at the end of the first section. Before actually removing the product from the database, the system will ask you if you really want to delete the product. By pressing **Yes** the product will be deleted from the database.

Predefined Reports

Based on the information in the central database, CRMWeb's reporting features make possible the generation of pre-defined reports pertaining to your accounts, opportunities, performed activities, leads and cases. Pressing the **Reports** tab will display the reports home page where all reports are listed. Select the report you would like to see and click on the report name to jump directly to that report.

Reports can also be accessed from the accounts, opportunities, leads and cases home pages. For more information see the respective chapters.

You can display the following reports:

Lead Reports

New Leads – displays all leads in your organization that have been created within the past 30 days.

Active Leads – displays all leads in your organization with activity within the last 30 days.

Neglected Leads – displays all leads in your organization with no activity in the past 30 days.

Account Reports

Neglected Accounts – displays all accounts in your organization with no activity in the past 30 days.

Active Accounts – displays all accounts in your organization with activity within the last 30 days.

New Accounts – displays all accounts in your organization that have been created within the past 30 days.

Contact Reports

New Contacts – displays all contacts in your organization that have been created within the past 30 days.

Neglected Contacts – displays all contacts in your organization with no activity in the past 30 days.

Active Contacts - all contacts in your organization with activity within the last 30 days.

Opportunity Reports

Opportunity Pipeline – displays all opportunities within your organization that have not yet been closed.

New Opportunities – displays all opportunities in your organization that have been created within the past 10 days.

Closed Opportunities – displays all closed (won/lost) opportunities.

Case Reports

Closed Cases – displays all closed cases.

Open Cases – displays all cases which have not been closed yet.

New Cases – displays all cases in your organization that have been created within the past 10 days.

Cases by Priority – displays all cases in order of importance.

Activity Reports

All Activities Tracking - track all activities within the last 30 days.

Documents

Options:

Upload a document
Update a document
Display a document
Delete a document
Attach a document to an email
Display a document's properties
Edit a document's properties

Documents Home Page

Documents are files relevant for your company's activity (like contracts, presentations, offers etc.). All files you upload, attach to records like accounts, leads, contacts, cases or products and all documents which you attach to emails are stored in the application. Once stored, they can be accessed either from the individual page of the record they are associated to, or from the **Documents** list, by clicking the **Documents** tab.

Pressing the **Documents** tab from the tab bar will display the documents home page where your documents are listed. In this page you can view the list of your documents in anti-chronological order as well as access individual document pages.

Press **[<<previous]** and **[next>>]** from the end of the list to navigate through the document list.

View a Document

To view a document, locate it in the document list on the documents home page and then click on its name. This will display the document detail page. Pressing the **Click here** link will display the document selected. In this page you can also view the document's properties, edit them, update the file and delete the document.

Upload a Document

To upload a document, follow the next steps:

1. Press the **Document** link button in the **Create** panel in the left side of the window.

2. Document Name - enter a name in for the new document (this field is mandatory and must be filled in)

3. Description – enter a description of the document to be uploaded.

4. Keywords – enter keywords separated by comma (the terms you enter are meant to facilitate the search).

5. File to upload - click **Browse** to select the file to be uploaded.

6. Click **Save**.

Update a Document

To replace the document with a newer version, follow the next steps:

1. Locate the document you would like to update and click on its name.

2. Press the **Update Document** button.

3. Click **Browse** and select the updated version.

4. Click **Update**.

The old document will be replaced with the new version.

Display Document Properties

To view a document's properties, locate it in the document list on the documents home page and then click on its name. This will display the document detail page where you can see the document's properties. In this page you also have the following options: edit the document properties, update the file and delete the document.

Edit Document Properties

In the document detail page click **Edit Properties**, make the changes you want and then click **Save**. You can also edit the properties of an attachment by clicking next to the attachment you want to edit in the attachments related list of a record.

Delete a Document

To delete an attachment, click next to the document to be deleted in the **Attachments** list of the associated record or **Delete** when you are viewing the **Edit** page of a document or the document detail page. Before actually deleting the attachment, the system will ask you if you really want to delete it. Pressing **Yes** will remove the attachment from the database.

Notes

Notes can be created, viewed, edited and deleted from the **Notes** related list on the detail pages of an account, contact, lead, opportunity and case.

View a Note

To view a note, click on its subject which is always given in the form of a link button.

Edit a Note

To edit a note, click , make the changes you want and then click **Save**.

Delete a Note

To delete a note, click next to the note to be deleted or **Delete** when you are viewing the **Edit Note** page or the note detail page. Before actually deleting the note, the system will ask you if you really want to delete that note. Pressing **Yes** will remove the note from the database.

Create a Note

To create a new note, go to the record (account, contact, lead, opportunity or case) you want to add a note for, click **Add Note**, specify a **Subject** (this field is mandatory and must be filled in), enter a description in the **Description** field and then click **Save**. The note is recorded in the detail page of that record and can be accessed at a later time.

IMPORTANT:

1. The subject of a note is provided throughout the system in form of a link-button which allows a quick access to the selected note.

2. When you delete a record (account, contact, lead, opportunity, case) all related notes will be also erased.

Attachments

Attachments can be added for a series of records such as: accounts, contacts, leads, cases and products from the detail page of each record. Once added, they can be accessed either from the individual page of the record they are associated to, or from the **Documents** list, by clicking the **Documents** tab.

View an Attachment

To view an attachment, click on the **View** link button next to the attachment you would like to display. You can also see an attachment by clicking on its name and pressing the **Click here** link in the **Document** detail page. In this page you can also view the document's properties, edit them, update the file and delete the document.

Editing Properties of Attachments

In the document detail page click **Edit Properties**, make the changes you want and then click **Save**. You can also edit the properties of an attachment by clicking next to the attachment you want to edit in the attachments related list of a record.

Delete an Attachment

To delete an attachment, click next to the attachment to be deleted or **Delete** when you are viewing the **Edit** page or the attachment detail page. Before actually deleting the attachment, the system will ask you if you really want to delete it. Pressing **Yes** will remove the attachment from the database.

Add an Attachment

To add an attachment, go to the record (account, contact, lead, case or product) you want to add an attachment for, enter a name in the **Document Name** field (this field is mandatory and must be filled in), a description in the **Description** field, keywords separated by comma in the **Keywords** field (the terms you enter are meant to facilitate the search), click **Browse** to select the file to be uploaded and then click **Save**.

Update an Attachment

To update an attachment, click on its name, press the **Update Document** button, then click **Browse**, select the updated file and then click **Update**. The old document will be replaced with the new version.

Activities

Open Activities

For record types like accounts, contacts, leads, opportunities and cases you can view **Open Activities** related lists. Open activities can be tasks to be performed (open tasks) or events scheduled.

To view the **Open Activities** list of a record, locate that record and click on it. The list is available in the second section of the record detail page. You can add new tasks or events by clicking on the corresponding buttons and filling in the forms displayed. Tasks and events created in the **Home Page** are automatically registered in the **Open Activities** list of the record they are related to.

To view detailed information on a specific activity, click on it.

Activity History

For record types like accounts, contacts, leads, opportunities and cases you can view **Activity History** related lists. In the **Activity History** list of a record are stored:

- all closed tasks related to that record
- all expired events related to that record
- phone calls documented by you (entered manually by using the **Log Activity** option)
- emails sent from the application by using the **Send Email** button,
- emails sent by using the **Mass Emails** functionality
- emails copied from your default mail application by using the **Log Activity** option

To view detailed information on a specific activity, click on it. To delete a specific activity, click next to it or display the individual activity page and then click **Delete**.

Log Activity

To add and document a performed activity (for instance a call) in the **Activity History** list of the associated record or to add an email from your default mail application, click **Log Activity**, fill in the form displayed and click **Save**.

Log Activity Fields

In the table below there is a list of all log activity fields and a short description for each field.

No.	Field	Description
	Activity Information	
1.	**Subject**	Enter the activity's subject.
2.	**Due Date**	Enter the date the task is supposed to be carried out or select it by using the calendar icon.
3.	**Related to**	Specify which contact or lead the activity is related to. Select the desired type of record from the

		corresponding drop-down list and then select the appropriate item from the list displayed by clicking on the icon.
4.	**Related to**	Specify which account, case or opportunity the task is related to. Select the desired type of record from the corresponding drop-down list and then select the appropriate item from the list displayed by clicking on the icon.
5.	**Type**	Select the appropriate activity type from the drop-down list provided.
	Description Information	
6.	**Comments**	In this field you can enter a description of the activity performed (for instance write some key words related to a phone call). You can also save an email sent or received with your default mail application.

User Management

Options:

User Roles

In CRMWeb there are three user roles with the corresponding rights: System Administrator, Team Leader and User.

The **User** has no special rights. He can access, and modify any data except for the user related information.

The **Team Leader** has all rights the normal user has. Additionally he can assign tasks, leads, opportunities, cases, accounts and contacts to other team members.

The **System Administrator** has the right to manage users (create new users, deactivate existing users).

Change the Owner of a Record

To change the owner of a record (account, contact, lead, opportunity or case), follow the next steps:

1. Locate the record whose owner you would like to change in one of the record lists available.

2. Click on the record's name or subject. This will display the record detailed page.

3. In the first section of the detailed page, click on **[Change Owner]** next to the **Record Owner** field.

4.This will display the list of all system users. Select the appropriate user from the list displayed, by clicking on its name. The record will immediately be updated and will be shown in the **Record Owner** field.

IMPORTANT:

1. Once the owner of a record is changed, the record will appear in the new owner's **My Record** list, as the new owner becomes responsible for the respective record.

Change Password

Users can change their own passwords and administrators can generate passwords for new users or reset passwords of existing users. To change your password, follow the next steps:

1. Click **Setup** in the right hand upper corner of the window.

2. Under **User Management** select **Change my Password** or **View my Information** and then **Change my Password**.

3. Fill in the displayed fields as follows:

***Old Password** - Enter your old password in the appropriate field.
***New Password** – Enter your new password.
***Confirm New Password** - Confirm the new password by entering it in the third field.

All fields are mandatory and must be filled in.

4. Click **Save**.

IMPORTANT:

1. All system users can change their passwords irrespective of their role.

2. Administrators can generate passwords for new users or reset the passwords of all system users.

3. If your administrator resets your password, you will be automatically notified by email.

Create a New User

Administrators can add new system users. In order to create a new user, follow the next steps:

1. Press **Setup** in the right hand corner of the window.

2. Under **User Management** select **Users**. This will display the list of all existing users. Here you also have the following possibilities:

To view a user, click on the user's name. Click **Edit** to update user information.

Click **Check All** to check all users, **Reset Password(s)** to reset the passwords for all users or **Clear All** to uncheck them.

Click **[<<previous]** or **[next>>]** to navigate through the user list.

3. Press the **New User** under **View Users**.

4. Fill in the form displayed. Fields marked with * are compulsory and must be filled in. All other fields are optional and may be left blank.

5. Click **Save**.

User Fields

In the table below there is a list of all user fields and a short description for each field.

No.	Field	Description
	User Information	

1.	**First Name**	Enter the user's first name.
2.	***Last Name**	Enter the user's last name.
3.	***User Name**	Enter the username the user will use to log on to the system.
4.	***Email**	Enter the user's email address. It must be a valid email address in the form name@company.com. If you click on the email address you can send emails using the email application which runs on your computer.
5.	**Company**	Enter the name of the company.
6.	**Department**	Type the department of the company the user belongs to.
7.	**Birth Date**	Enter the contact's birthday. You can either type the date in the format accepted by the system and specified next to this field, or select it from the calendar by clicking on the icon.
8.	**Role**	Select the appropriate role (Administrator, Team Leader or Employee) for the user from the drop-down list available.
9.	**Is Active**	Specify if the user is active or not by checking/unchecking the corresponding check box. If the box is checked, the user is active (he can use the application).
10.	**Phone**	Enter the user's phone number.
11.	**Mobile**	Enter the user's mobile phone number.
12.	**Fax**	Introduce the fax number of the user.
13.	**Employee Number**	Enter a number to use for identifying the user in your company.
14.	**Title**	Type the user's position within the company.
Address Information		
15.	**Street**	Enter the street name of the address.
16.	**City**	Enter the city for the address.
17.	**State**	Enter the appropriate territorial-administrative division (state, county etc.) of the new user.
18.	**ZIP/Postal**	Enter the Zone Improvement Plan Code or the Postal Code.
19.	**Country**	Introduce the country for the user's address.
Email Information		
20.	**SMTP Server**	Enter the SMTP (Simple Mail Transfer Protocol) Server.
21.	**SMTP User**	Enter the SMTP user name.
22.	**SMTP Port**	Enter the SMTP port.
23.	**SMTP Password**	Enter the password the user uses to connect to the SMTP server.
24.	**Use SMTP Authentication**	Specify if the server requires SMTP Authentication in order to send and receive mails by checking the check box available.

25.	**Generate new password and notify user.**	Specify if you want the system to generate a password for the new user and to automatically notify the user per email by checking the check box available.

Edit an Existing User

Administrators can edit user information.

To edit a user, follow the next steps:

1. Click **Setup** in the right hand corner of the window.

2. Press **Users** under **User Management.**

3. Press the  button next to the user you want to edit from the **Action** column or click on the name of the user to be edited and then press **Edit** at the end of the page.

4. Modify the information you want to update.

5. Click **Save** to save the changes you have performed and return to the users page or **Cancel** to return to the page you were previously viewing without saving the changes.

Deactivate a User

Users cannot be completely deleted from the system, but they can be deactivated, so that they cannot log on to the system anymore. Only administrators can deactivate users.

To deactivate a user, locate it in the users list, click on its name, press **Edit,** uncheck the **Is Active** check box and then click **Save**.

Import Data

You can import data from any program (Excel, Editor etc.) which can save data in Comma Separated Values (.csv) format. The application allows you to import contacts, accounts and leads from external sources.

To import accounts, contacts or leads follow the next steps:

1. Click **Setup** in the upper right hand corner of the window.

2. Under **Data Management** click **Import Data**.

3. In the page displayed (**Import Data - Step 1**) select from the drop-down list available the record type you would like to import (accounts, contacts or leads).

4. Prepare the file containing the data you would like to import by following the steps described in the import assistant:

- Launch the application and open the data file.
- Select the **Save As…** or **Export…** menu option.
- Save the file in a .csv format.

5. To upload the .csv file click **Browse** next to **File to upload**, select the .csv file to be uploaded and then click **Import**.

6. In the **Import Data – Step 2** page you can map the columns from the .csv file to the record fields. By default all rows to be imported will be checked. In the first column of the table displayed uncheck the rows you don't want to import. To map a column to the appropriate record fields select for each column the corresponding field from the drop-down list available. When you have assigned all fields click **Next**.

When you import contacts, you can specify whether you would like to create an account for your imported contacts or not. To create an account for a contact, map the corresponding column to the **Account name** field from the dropdown box available. This will automatically display a dropdown list for each item to be imported in the **Account name** column. Select the **No action** option for the items you don't want to create an account for.

A message will be displayed to inform you whether the import was successful or not.

IMPORTANT:

1. When importing data you have to make sure that all mandatory fields are given a value, otherwise the import will not be carried out. Mandatory fields are **Last name** for **Leads** and **Contacts** and **Account name** for **Accounts**.

2. When importing leads you will also have to specify the lead status which can be one of the following: **Open, Contacted, Qualified and Unqualified.** If you do not specify the lead status, the import will not be carried out and an error message will be displayed.

Views

In the home page of a specific record type (account, contact, lead, opportunity, case, product) you can filter your records based on a series of criteria. You can either select a predefined view from those available in the drop-down list, or define your own views in order to filter the records and display only records which fulfill the criteria selected.

For example you can display leads from a specific lead source, accounts from a specific industry, opportunities greater than a specific amount etc.

You can also sort your leads and contacts in order to send them mass emails.

Once created, views are available for editing in the drop-down list. They can also be deleted.

Create New View

You can create new views for your records, to see for instance only contacts located in your state, accounts created in the last year, leads with over 200 employees etc. You can also use this feature to send mass emails.

To create a new view for your records follow the next steps:

1. Press **Create New View** in the home page of the **Record** (accounts, contacts, leads, opportunities, cases or products) you would like to create a new view for.

View Information section

2. View Name - type the name of the view – this field is compulsory and must be filled in. The name you enter will be shown in the view drop-down list.

Visibility section

3. Specify whether the view can be used exclusively by you or by all users by checking the corresponding radio button.

Display Columns section

4. Choose the items (data fields) to be displayed in your view from the drop-down lists available (billing address, billing city, create date, description etc.). You can select up to eight columns to be shown in your view.

Filter Conditions section

5. Specify which criteria the selected data fields must match, for example "Billing Country Starts With A", "Create Date Greater Than 12.05.2001", "Description Contains CeBIT", "No. of Employees Greater Than 200" etc.

How to enter filter criteria:

First column

6. Select an item from the drop-down list.

Second Column

7. Choose an operator from the drop-down list available.

Third Column

8. Type your filter terms. For value constants and variables like user name, current date, current week you can use the following place holders: **[Me]**, **[Today]**, **[This Week]** which will be replaced by specific values in the filter process.

Repeat these steps for other filter conditions. You can specify up to four filter conditions for a view.

Example: You would like to display all your accounts from Romania which have more than 200 employees and which you met at the CeBIT. Select the following filter conditions: "Type Equals Customer", "Country Equals Romania", "No. of Employees Greater Than 200" and "Description Contains CeBIT".

Order by section

In this section you can set the order of the records which will appear in your view. You can specify up to two order criteria.

First column

9. Choose an item from the drop-down list provided.

Second Column

10. By selecting the appropriate option from the drop-down list available you can specify whether the records should be listed in ascendant or in descendant order according to the item selected in the first column.

Repeat these steps if you want to specify another order criterion.

Example: You would like your records to be ordered according to the number of employees with the account having more employees at the top. Select in the first column the item **No Of Employees** and in the second the option **Descendant**. Additionally you would like the system to display accounts according to their **Create Date** with the newest at the top. Select in the third column the item **Create Date** and in the fourth the option **Descendant**.

11. Click **Save** to save the view.

You can also return to the page you were previously viewing without changing the view by pressing **Cancel** or delete the view by pressing **Delete**. Once created, a view is available for future use in the views drop-down list and can be edited.

IMPORTANT:

1. The relationship between the selected filter conditions is by default AND. This means that EACH record will have to fulfill ALL criteria specified in order to be displayed.

2. Place holders are not case sensitive which means the computer cannot determine the difference between a lowercase and uppercase letter. You can type [me], [ME], [mE] or [Me]. The application doesn't differentiate between those values, it sees the same word.

3. When you enter dates, you must use the format used in the application: dd.MM.yyyy. Example: 23.09.2005.

4. When you are searching for phone numbers, you must enter the exact phone number formatting. Example: +49 (0)0231 562873.

Using Place Holders

For value constants and variables like user name, current date, current week you can use place holders which will be replaced by specific values in the filter process.

Following place holders are available:

[Me] – current user
[Today] – current date
[This week] – current week
[This month] – current month

For instance you would like to display only records which you are responsible for and which were created during the current day. You also want to make the view visible for all users. In the **Filter Conditions** section select in the first column **Owner**, in the second column **Equal** and in the third column type **[Me]**. For the next filter criterion select **Create Date, Equal, [Today]**. The view will display records which you owe and were updated in that particular day (in the day you access the view). If another user accesses the view from his user account, the records he owes and fulfill the criteria specified will be displayed.

Edit a View

To edit a view you created, click **Edit View**, change the information you want to update and then click **Save**.

Delete a View

To delete an existing view, select the view you would like to edit from the drop-down list and then click **Delete** at the bottom of the page.

Emails

Sending Emails

You can send emails to contacts, leads and users in your organization directly from the individual page of an account, contact, lead, opportunity, case. These emails will be stored in the **Activity History** of the respective record. You can also send emails which will be not saved in the system by clicking on the email address of a contact, account, lead etc. This will automatically open your email application and allow you to send an email to the selected email address.

You can also use the mass email option to send emails to more addresses simultaneously. This functionality is very useful for support emails, marketing or sales actions as it reduces your effort and saves valuable time. See **Send Mass Emails** for more information.

You can create email templates in Text-Only or HTML format which are stored in the system and can be sent later either to a single email address, or to multiple email addresses with just a few clicks.

To send an email which will be recorded in the **Activity History** list of a record, follow the steps described below. Optionally you can select an email template by pressing the **Select Template** button and choosing a template from the list displayed. See **Create Email Templates** for detailed information on email templates.

1. Press the **Send an Email** button next to **Activity History** list. This will display the **New Email** page. Fields marked with ***** are compulsory and must be filled in. All other fields are optional and may be left blank.

2. Email Format – select the email type you would like to create: Text-Only or HTML.

3. *To – select the name of the record you want to email by using the icon. In some cases the system will automatically enter the name of the record. For instance when you send an email from the detail page of a contact or lead the name field will be filled in by the system. Only one name can be entered in this field.

4. You can relate the email to an existing account, case or opportunity. Select the appropriate item from the drop-down list available and then select the record by using the icon. This field will be recorded in **Activity History** but will not be sent with the email.

5. Click the **CC** link button to select the email addresses of the users to whom you want to send a carbon copy of the email. Alternatively you can also introduce email addresses manually for instance email addresses which are not available in the drop-down list.

6. Click the **BCC** link button to select the email addresses of the users to whom you want to send a blind carbon copy of the email. You can also introduce email addresses manually.

7. Enter the subject of the email. The subject is given in the form of a link button throughout the system. Clicking on it will display the body of the message and information pertaining to the email.

8. Body – edit the message you would like to send.

9. Press the **Attach Files** button if you want to enclose documents to your message. This will display a new page with two sections.

Internal Documents

Internal documents are documents stored in your application. Select the files you would like to annex by checking the corresponding boxes. Use the **[<<previous>>]** and **[<<next>>]** buttons to navigate through the document list.

External Documents

To attach documents saved on your computer, click **Browse**, select the document you want to annex and repeat this action until you have finished attaching all files you want to attach.

Click **Continue to Message** to return to the **New Email** page.

To remove files click on **Remove** next to the file you would like to remove.

10. Press **Send** to send the message or **Cancel** to return to the page you were previously viewing without sending the message.

IMPORTANT:

1. You can attach both internal and external documents to one message. There are no limits as to the total size of the documents attached.

2. In the **CC** and **BCC** fields you can either enter email addresses, or select existing users from the list by clicking the **CC** or **BCC** link buttons. Email addresses can be separated by semicolon or by comma.

3. The subjects of all emails you send are listed in the Activity History of the related records in the form of link buttons. Clicking on the subject will display the sent email. Attachments are not stored with the email.

Sending Mass Emails

You can send an email (HTML or Text-Only) to an unlimited number of recipients (leads or contacts). You can attach files to your message if you wish. For instance, you would like to send the new product catalogue to your leads or to inform them about a special offer. The mass email functionality allows you to quickly and easily send the message to multiple email addresses with just a few clicks.

To send mass emails to your contacts or leads follow the next steps:

1. Go to the home page of the record type you would like to mass email (contacts or leads) by clicking the appropriate tab.

2. Create a view which contains the email addresses intended to receive this email. If the view does already exist, skip this step.

3. Click **Mass Email Contacts** or **Mass Email Leads** under **Tools**.

4. Step 1: Select a view that contains the recipients intended to receive this email. Check the appropriate radio button and then click **Next >**.

5. Step 2: Uncheck the names of the records which should not receive the email.

6. Step 3: Select an email template to use for this email. Check the appropriate radio box. Under **Additional Information** there are to options: send a blind copy of each email to yourself and store for each email an activity in the **History Activity** list of the records intended to receive this email. By default the two options are checked. If you do not want to receive a blind carbon copy or to store an activity for each record, uncheck the corresponding check box under **Additional Information**. Then click **Next >**.

7. Step 4: Attach files. To attach files which are stored in the application, select the appropriate check boxes under **Internal Documents**. Click **[<< previous]** or **[next>>]** to navigate through the document list. To attach files which are stored on your computer, click **Browse** under **External Documents** and select the files you would like to send with the email. You can send both internal and external documents with an email. Click **Next >** when you have attached all files you would like to send.

8. Step 5: Send the mass email. Click **Send** to send the email to the selected recipient list when you have finished with your settings. Click **Back** to review the settings.

IMPORTANT:

1. Contacts or leads with the **Email Opt Out** field selected will not be included in any email list views.

2. After sending the email, a message will be displayed informing you that the emails have been successfully sent.

Email Templates

The application allows you to create email templates which you can send easily to one or to multiple email addresses. To manage your email templates click **Setup** in the upper right-hand corner of the window. Under **Communications Management** you can create email templates or view existing templates by selecting the appropriate link.

Once created, email templates can be edited and used when you send mass emails or when you send an email from the **Activity History** related list of a record.

You can attach files to existing email templates when you send them.

IMPORTANT:

1. An email template can be used only by the creator.

Create an Email Template

You can create two types of email templates: **Text-Only** and **HTML**.

Create a Text-Only Email Template

To create a text-only email template follow the next steps:

1. Click **Setup** in the upper right-hand corner of the window.

2. In the page displayed, click **Create an email template** under **Communications Management** either in the main section or in the left sidebar of the page.

3. In the **Email Template** page fill in the fields displayed.

4. *Email Template Name – enter a name for the new template. This field is compulsory and must be filled in. This piece of information will not be sent with the template, it is only available for internal use.

5. Email Format – select **Text-Only** from the drop-down list available.

6. Description – type a description for the template to be created. The description will not be sent with the email. It is only available for internal use.

7. *Subject – enter the subject of the template. This field is mandatory and must be filled in. It will appear in the email.

8. Body – enter the message to be sent.

9. Click **Save** to save the template. Click **Cancel** to return to the page you were previously viewing without saving the new template.

Create an HTML Email Template

To create an HTML email template you can write the HTML code in the body of the template, edit the email with a standard application and insert the code in your template or format it with the toolbar available.

To create an HTML email template follow the next steps:

1. Click **Setup** in the upper right-hand corner of the window.

2. In the page displayed, click **Create an email template** under **Communications Management** either in the main section or in the left sidebar of the page.

3. In the **Email Template** page fill in the fields displayed.

4. *Email Template Name – enter a name for the new template. This field is compulsory and must be filled in. This piece of information will not be sent with the template, it is only available for internal use.

5. Email Format – select **HTML** from the drop-down list available. This will display an HTML editor next to **Body**.

6. Description – type a description for the template to be created. The description will not be sent with the email. It is only available for internal use.

7. *Subject – enter the subject of the template. This field is mandatory and must be filled in. It will appear in the email.

8. Body – enter the message to be sent. See **Using the HTML Editor** for more information.

9. Click **Save** to save the template. Click **Cancel** to return to the page you were previously viewing without saving the new template.

Create email templates for personalized mass emails

You may want to send an email to a list of addressees. The system allows you to send personalized mass-emails and give each addressee the feeling he was contacted personally. When you create an email template to be sent to a list of recipients in addition to the steps described above you can prepare the steps required to send personalized emails.

Insert variable – in the first column select the type of record the email template is addressed to (lead or contact). In the second column select **Salutation** and press **Insert**. Repeat this step by selecting **Last Name** in the second column and pressing **Insert.** The variables will be automatically inserted in the **Body** field and replaced with the corresponding salutation respectively with the corresponding last name when the email is sent. You just have to write 'Dear' in the **Body** field, in front of the variables and continue with the message.

View an Email Template

To view an email template, click **Setup**, select the template you would like to display and click on its name. In this page you can also edit or delete your template.

Edit an Email Template

To edit an email template, locate the template you would like to edit in the template list, click on its name and then click **Edit** at the bottom of the page. Make the changes you want and then click **Save**. Click **Cancel** to return to the page you were previously viewing without saving the changes.

Delete an Email Template

To delete an email template, locate the template you would like to delete in the template list, click on its name and then click **Delete** at the bottom of the page.

Using the HTML Editor

You can create or edit an HTML email or email template with the HTML Editor. Following there is a description of the items available in the editor. Click on the appropriate option and then type your text, or select the text you would like to format and then click on the appropriate option.

No.	Item	Description
1.	**Paragraph**	Choose the paragraph type.
2.	**Font**	Select the font type for your text.
3.	**Size**	Select the character size.

4.	**Colour**	Select the character colour.
5.		Apply bold formatting.
6.		Apply italic formatting.
7.		Underline text.
8.		Strike text through.
9.		Format the text as superscript.
10.		Format the text as subscript.
11.		Remove all formatting.
12.		Align text left.
13.		Align text right.
14.		Center text.
15.		Justify text.
16.		Add bullets to a list.
17.		Add numbers to a list.
18.		Indent – move the paragraph towards the right margin.
19.		Outdent – move the paragraph towards the left margin.
20.		Create link – create a link in your text. Select the text you would like to create a link for, click on this icon, enter the URL in the field displayed after **http://** and then click OK.
21.		Remove link – select the link you would like to remove and then click on this icon.
22.		Insert picture - insert a link for a picture you would like to display in your email. Right-click on the picture, select the URL, click on this icon, enter the URL in the field displayed after **http://** and then click OK.
23.		Insert rule.
24.		Cut text.
25.		Copy text.
26.		Paste text.
27.		Undo latest action.
28.		Redo latest action.
29.		

		Print the email.
30.		Insert a table which you can format by using the table editor displayed.
31.	Design	Click this button to see the email as it will be sent.
32.	HTML	Click this button to see or edit the HTML code.