



QAD Enterprise Applications

Training Guide Customer Relationship Management (CRM)

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Change Summary

The following table summarizes significant differences between this document and the last published version.

Date/Version	Description	Reference
June 2012/6.5.1	Rebranded for QADCustomerRelationshipManagement(CRM) 6.5.1	---

About This Course

Course Description

This course is designed to give participants the knowledge and hands-on experience they need to use the Sales Management Module in the QAD Customer Relationship Management (QAD CRM) Application.

The Sales Management Module enables organizations to manage sales processes, maintain customer relationships, and interface customer and sales data with QAD ERP.

Course Objectives

By the end of this class, students will:

- Know how to navigate and use help in QAD CRM.
- Use the Sales Management Module to manage your organizations sales opportunities, customers and business contacts efficiently.
- Create and use reports in QAD CRM.

Audience

The audience for this course includes QAD employees, customers and partners. Specific organizational roles include the following:

- Sales Representatives, Administrators and Managers
- Customer Service Representatives
- Consultants
- Power Users
- Implementation Team Members

Prerequisites

- An understanding of your organization's business processes and customer goals
- A working knowledge of your organization's sales cycle and process
- A basic knowledge of QAD Enterprise Applications, including navigation

Course Credit and Scheduling

QAD CRM Sales Force Automation is a two (2) day class when delivered as instructor led in a classroom environment.

Virtual Environment Information

The hands-on exercises in this book should be used with the latest Customer Relationship Management (CRM) learning environment. When prompted to log in, specify *demo* for user ID and *qad* for password.

Additional Resources

If you encounter questions on QAD software that are not addressed in this book, several resources are available. The QAD corporate Web site provides product and company overviews. From the main site, you can access the QAD Learning or Support site and the QAD Document Library. Access to some portions of these sites depends on having a registered account.

<http://www.qad.com/>

QAD Learning Center

To view available training courses, locations, and materials, use the QAD Learning Center. Choose Education under the Services tab to access this resource. In the Learning Center, you can reserve a learning environment if you want to perform self-study and follow a training guide on your own.

QAD Document Library

To access release notes, user guides, training guides, and installation and conversion guides by product and release, visit the QAD Document Library. Choose Document Library under the Support tab. In the QAD Document Library, you can view HTML pages online, print specific pages, or download a PDF of an entire book.

To find a resource, you can use the navigation tree on the left or use a powerful cross-document search, which finds all documents with your search terms and lets you refine the search by book type, product suite or module, and date published.

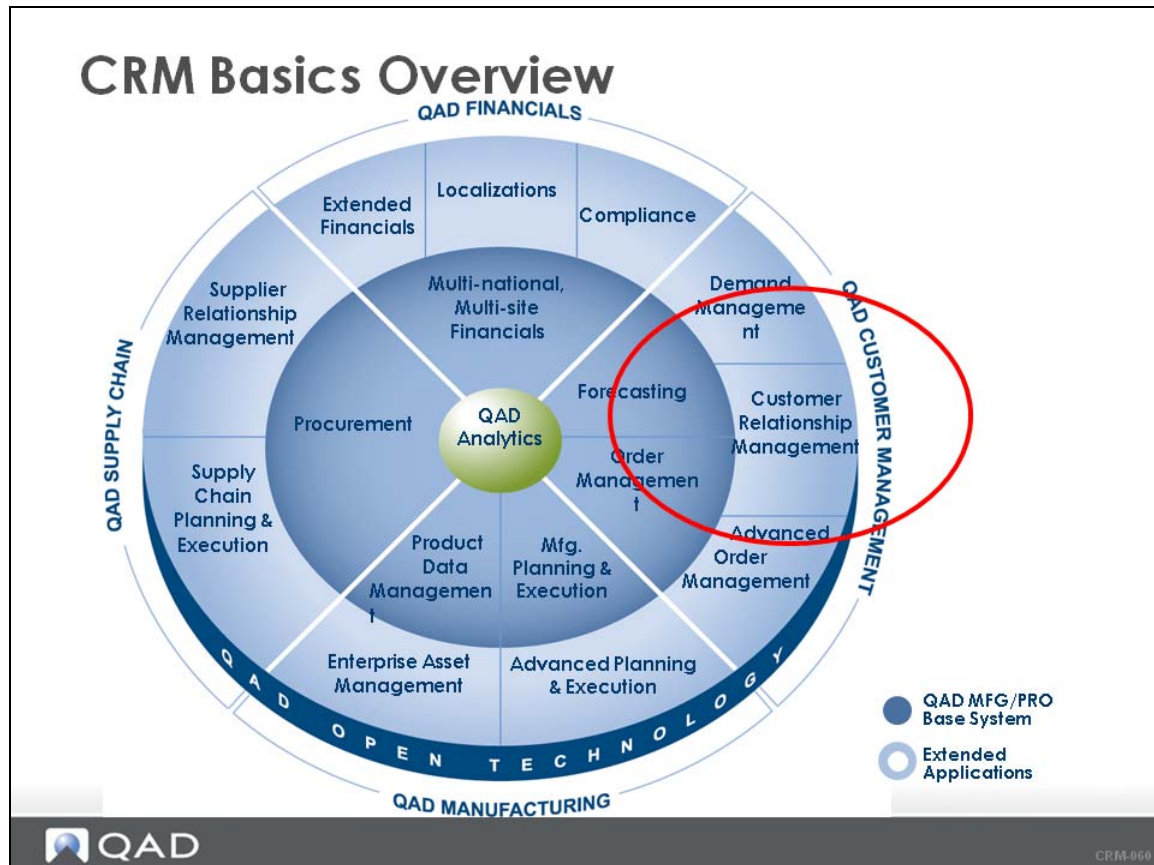
QAD Support

Support also offers an array of tools depending on your company's maintenance agreement with QAD. These include the Knowledgebase and QAD Forums, where you can post questions and search for topics of interest. To access these, choose Visit Online Support Center under the Support tab.

Chapter 1

Introduction to QAD CRM Sales Management

CRM Basics



In this chapter you gain an understanding of the QAD Customer Relationship Management (CRM) functionality which is a part of QAD's Customer Management's Strategy.

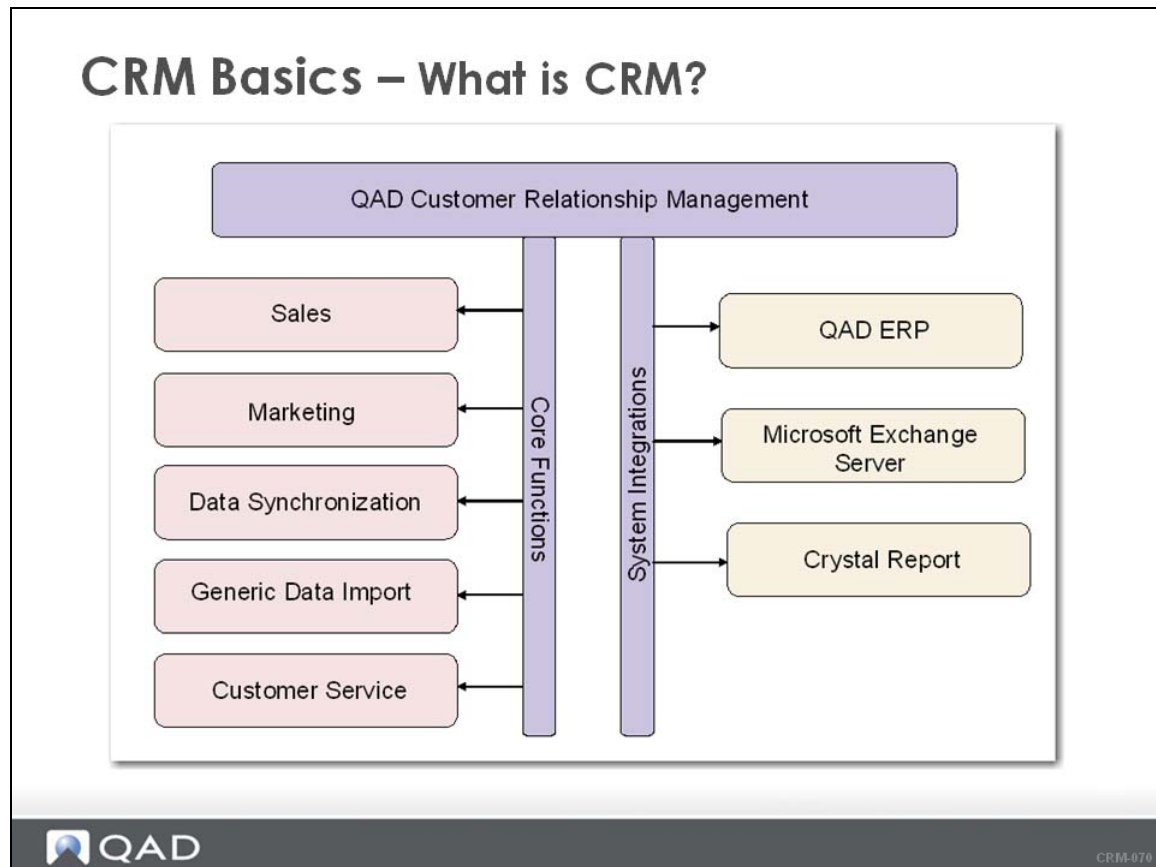
QAD Customer Management Solutions run and measure marketing campaigns, manage sales opportunities through the sales lifecycle and optimize the order and fulfillment process while ensuring customer retention by enabling you to anticipate your customer's needs quickly.

Learning Objectives

By the end of this chapter, you will be able to do the following:

- Describe the QAD CRM Application Modules
- List the benefits of using QAD CRM
- Describe the main records used in QAD CRM – Profiles, Contacts and Opportunities
- Contrast how you accomplish your daily customer relationship activities today and how you will accomplish these same activities using QAD CRM

What is CRM



CRM is a strategy or approach that allows you to respond to the market place and your customers quickly and effectively through tracking and managing your sales, marketing and services functions easily and effectively.

QAD CRM contains the following modules that share the same data:

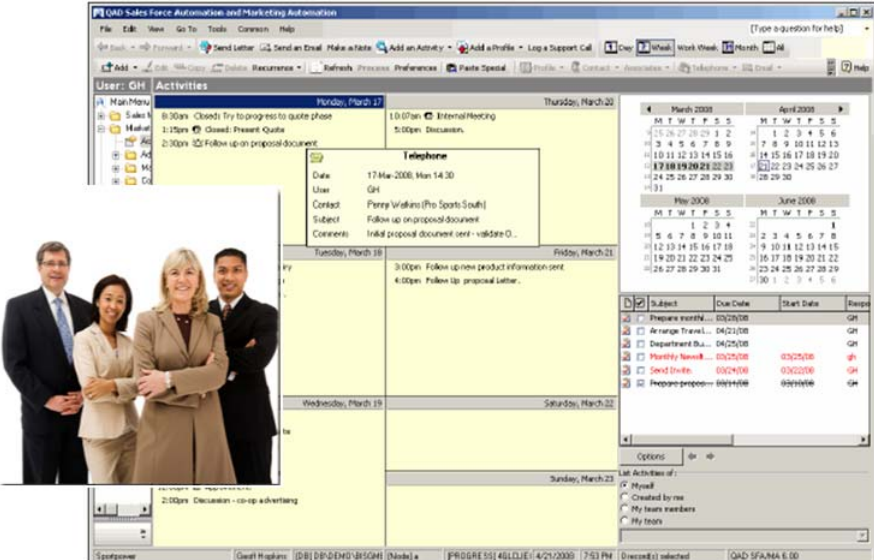
- Sales Management: Manage details of existing, new and prospective customers and opportunities.
- Marketing Management: Build, manage and analyze marketing campaigns and costs.
- Customer Service: Log and assign customer issues for follow up throughout the customer lifecycle.

QAD CRM shared functionality includes:

- QAD/ERP Integration
- Activity and task management (calendars, emails, scheduling)
- Customer communication through letters and collateral
- Analytics – Reports and Dashboards

CRM Benefits

CRM Basics - Benefits



360 Degree View of Your Customers

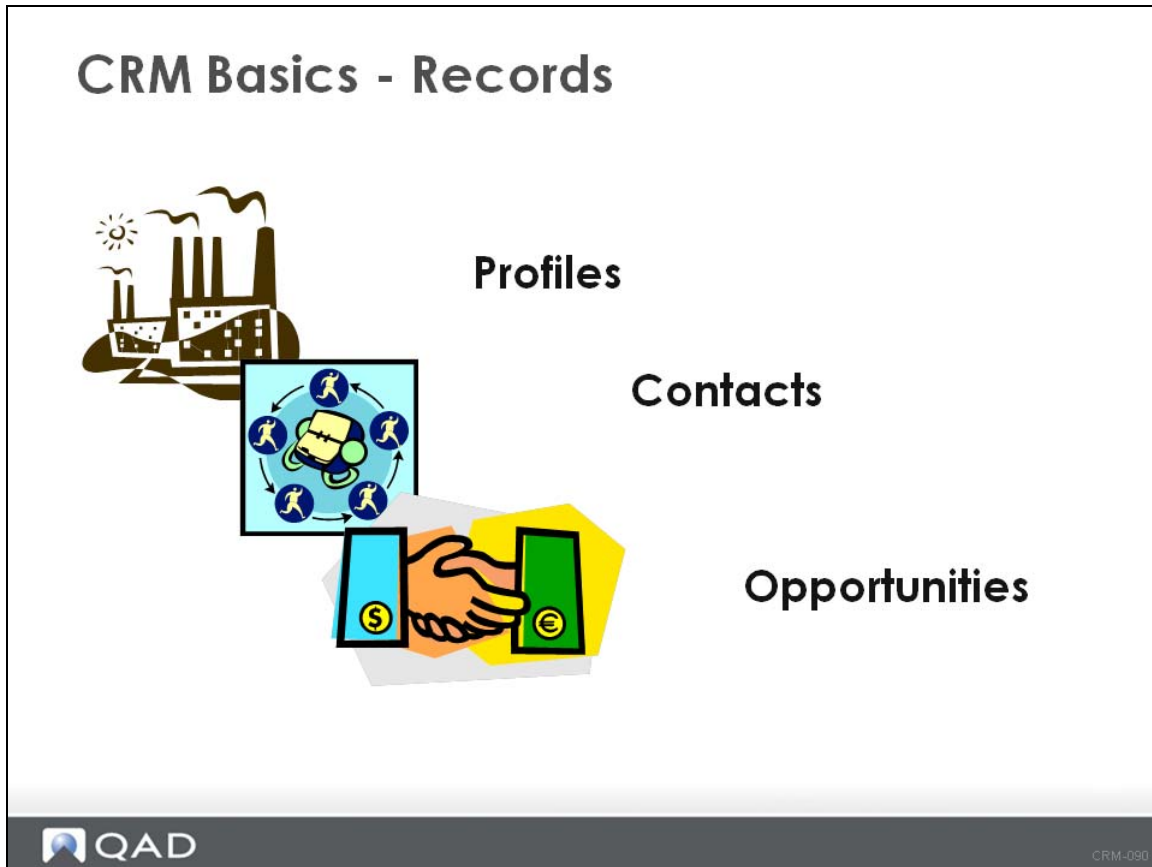
QAD CRM-080

A sound CRM strategy enables your business to be efficient, productive and responsive to the demands of your Customers and improve your internal communications. QAD CRM provides a 360-degree view of your customer, integrating prospect, customer and partner information at every touch point.

The Value of QAD CRM:

- Improve internal team and department communications
- Lower costs while attracting and retaining customers
- Generate greater customer loyalty
- Increase cross-sell and up-sell successes
- Improve sales forecasting
- Improve customer responsiveness with access to relevant and timely data

CRM Basics - Records



QAD CRM has a number of records that you will manage. Before you see a demonstration of QAD CRM let's discuss the three main records: Profiles, Contacts and Opportunities.

Profile:

- A business that has an association with your organization.
- A profile can be a customer, prospect, competitor or supplier.
- Profiles form the core of QAD CRM - QAD CRM is "profile centric".

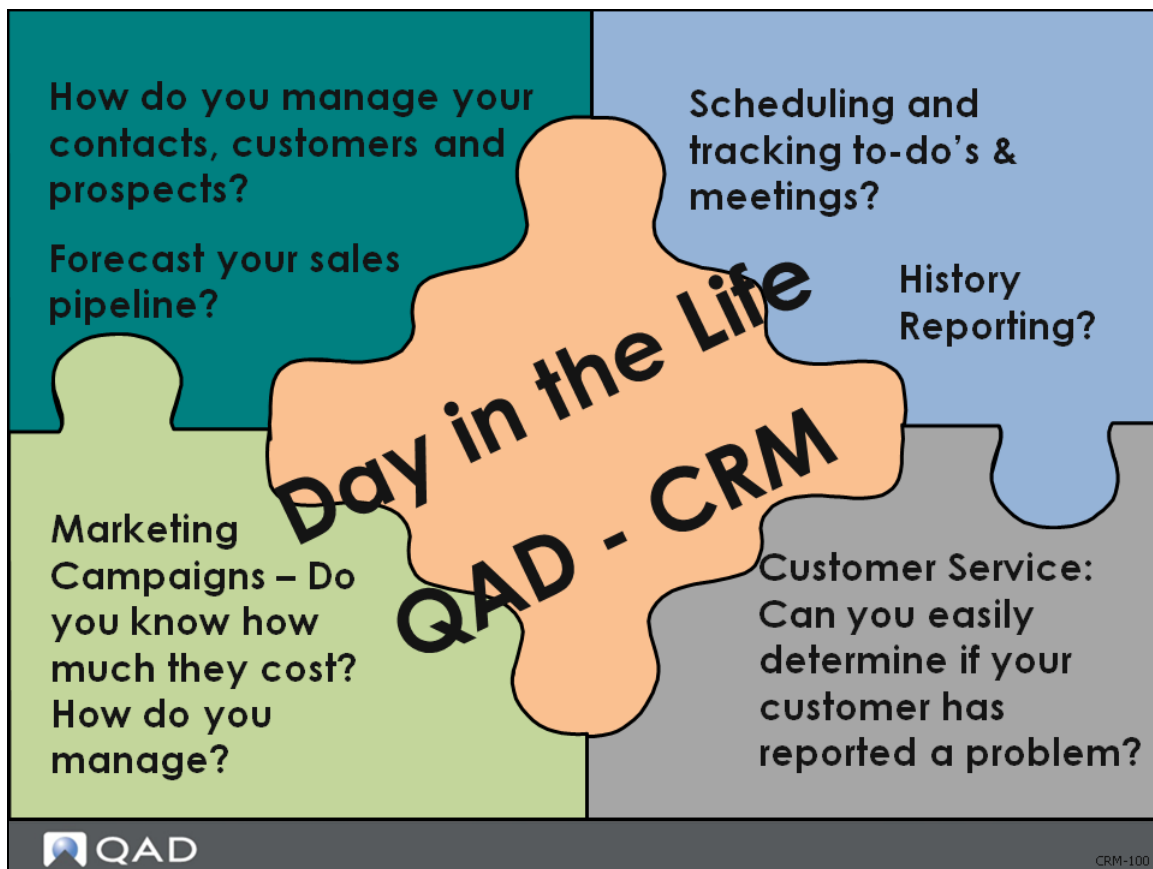
Contact:

- Contacts are people who work for a profile.
- You communicate with contacts while conducting business-related activities.
- There can be more than one contact specified for a profile and a contact can be associated with multiple profiles.

Opportunity:

- An opportunity is a business "deal" with stages.
- Opportunities are identified and managed in an effort to convert them into actual business sales.

Day in the Life QAD CRM



As we view either a pre-recorded demonstration of QAD CRM or your instructor demonstrates QAD CRM, think about the following questions:

- What do the QAD CRM benefits discussed earlier really mean?
- Can you easily respond to the questions in the above slide?
- How will QAD CRM change your day-to-day life and improve your organization's relationships with your customers?
- Think about your role: Sales, Customer Service, or Marketing how could QAD CRM make you more productive and help you help your customers.
- If you are a Manager, how will QAD CRM help you manage and motivate your team?

CRM Basics - Knowledge Check

CRM Basics – Knowledge Check



- Complete the Knowledge Check by filling in the blanks with the correct answer or indicating if the statement is "True" or "False". If you are attending Instructor-Led Training your instructor will discuss your answers.



- Self-Paced Training participants follow the instructions to log problems or get help. The answers to the Knowledge Check are in the back of the Training Guide.



CRM-110

- 1 List the three applications that make up QAD CRM:

- 2 A profile can be a customer, prospect, competitor or supplier. (True or False?)

- 3 A contact is an individual that works for a profile. (True or False?)

- 4 List two benefits of CRM QAD:

- 5 An opportunity is a closed business deal or order. (True or False?)

CRM Basics - Key Points

CRM Basics – Key Points

- Review the Chapter Key Points



- Questions?



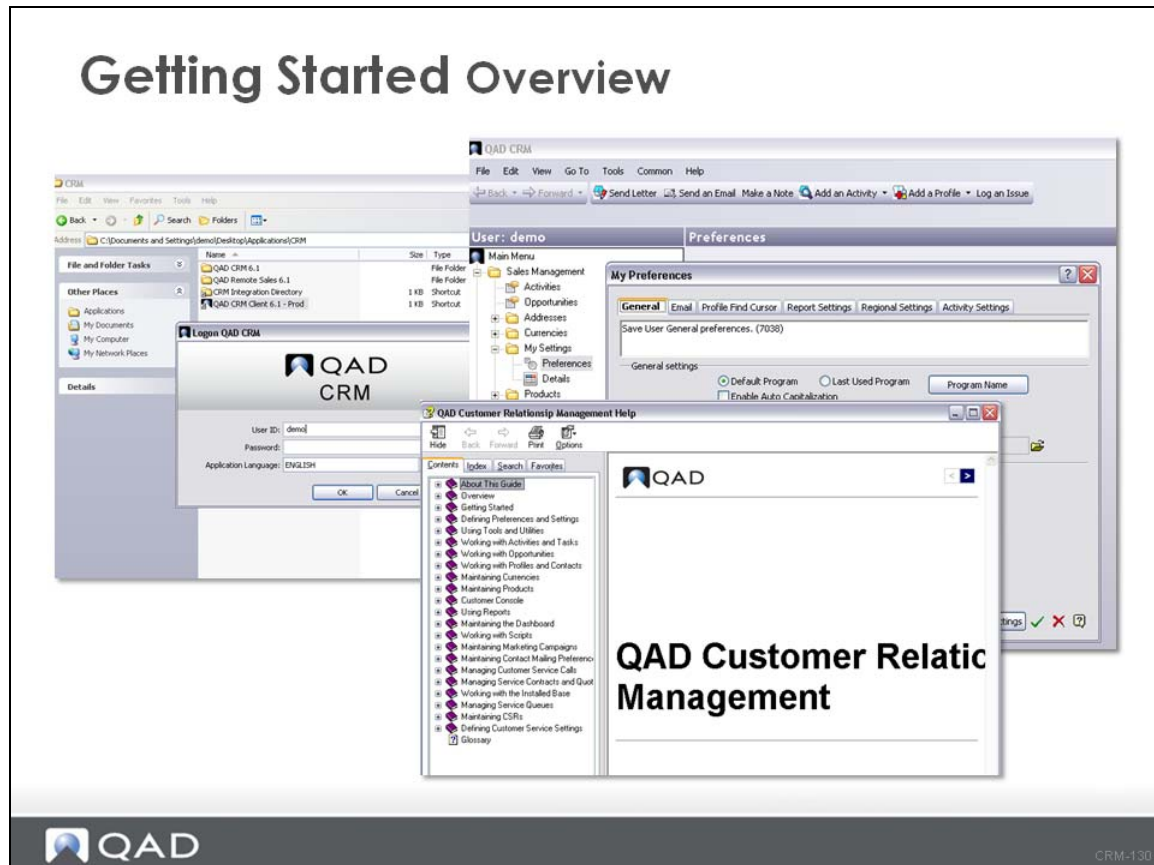
CRM-120

- CRM is an approach to understand customer requirements and behavior.
- CRM includes studying sales and marketing effectiveness and market trends.
- CRM requires a customer-centric business philosophy to support effective marketing, sales, and service processes.
- QAD CRM is the tool that allows you to implement your customer-centric strategy using the following modules:
 - Sales Force Automation
 - Marketing Automation
 - Customer Service
 - CRM/ERP Integration
- QAD CRM modules share the same customer data which can be integrated with QAD ERP
- There are many records in QAD CRM but the three main records are:
 - Profile: a business that has an association with your organization
 - Contacts: people who work for a profile
 - Opportunity: a business lead/deal.

Chapter 2

Getting Started

Getting Started Overview



In this chapter you learn how to access, navigate and use help in QAD CRM. You review your QAD CRM settings and gain an understanding of QAD CRM data security.

Learning Objectives

By the end of this chapter, you will be able to do the following

- Log in and out of QAD CRM.
- Navigate QAD CRM.
- Use QAD CRM help.
- Describe CRM security
- Review your settings

How to access QAD CRM?

Depending on the version, QAD CRM can be accessed as a stand-alone database (no QAD ERP integration), integrated with QAD ERP Standard or Enterprise Edition using the QAD client, or QAD Remote Sales.

Log in to CRM

- 1 Launch the QAD Training Environment (VTMS):
 - a Self Paced Participants - Follow the instructions you received at registration to access the CRM Log-On Screen
 - b Instructor-Led - Follow your instructor's direction to access the CRM Log-On
 - c Stand-alone Database - Select the QAD Demo from programs
- 2 In the QAD CRM Logon enter the User ID and Password.

For the purposes of the CRM Sales Management Training Class your business role is account manager. Your User ID is Account Manager One (AM1) and your password is **qad** which is case sensitive.

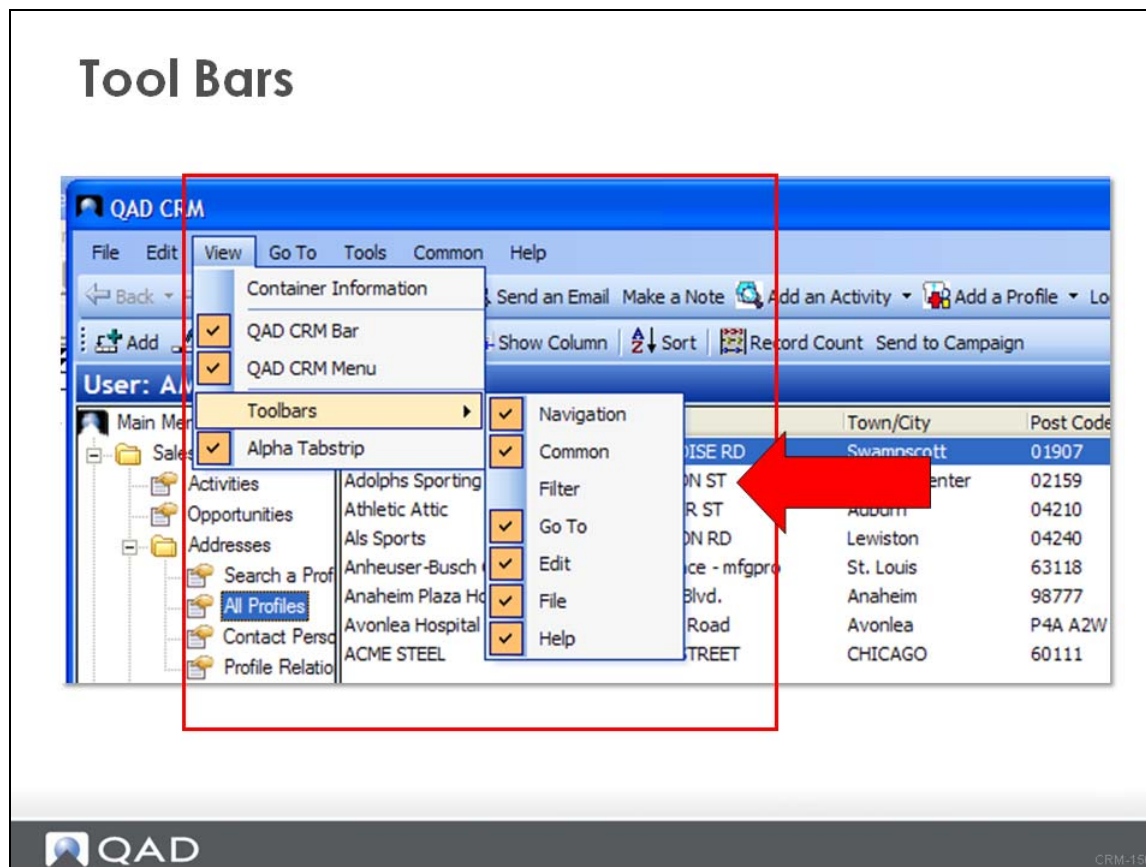
Enter the following information in the logon dialogue box:

 - User ID: AM1 or Demo
 - Password: qad
- 3 In the training environment the Application Language field is set to English; however, QAD CRM does support multiple languages.
- 4 Click OK.

Log out of CRM

- 1 Select the File/Exit option from the Main Menu. The Shut Down dialogue displays:
- 2 Select Close, Log off or Restart from the drop-down list.
- 3 Select the Remember settings check box if you want the system to remember your current settings at login.
- 4 Click OK.

Tool Bars



The screen has a user-friendly interface that includes the following components:

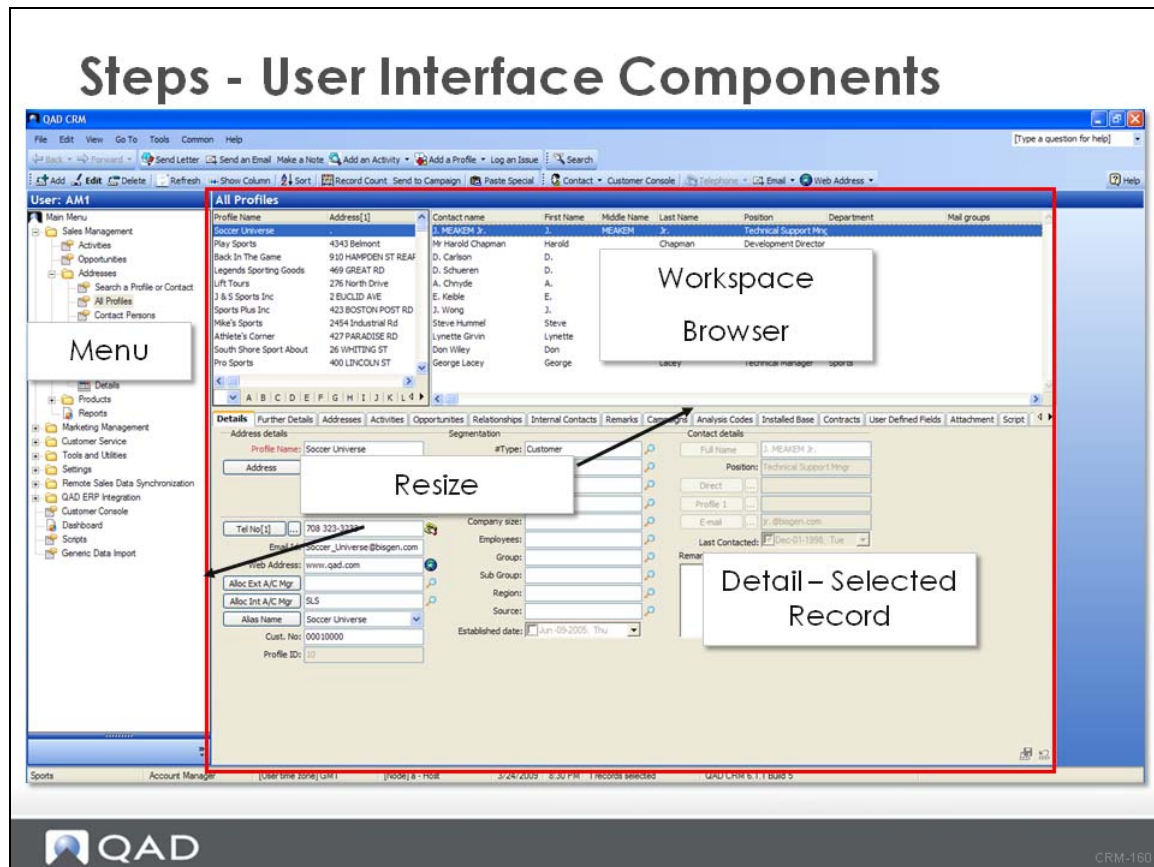
- Application Menu Bar
- Application Tool Bar
- Workspace
- Sidebar menu
- QAD CRM Bar
- Tabs and Status Bar.

Recommended Tool Bars - Step-by-Step

To view the QAD CRM Bar, QAD CRM Menu, and Toolbars.

- 1 Click View from the Application Menu Bar to select.
- 2 Click View | Toolbars to select the Navigation, Common, Go To, Edit, File and Help Toolbars.

Steps - User Interface Components



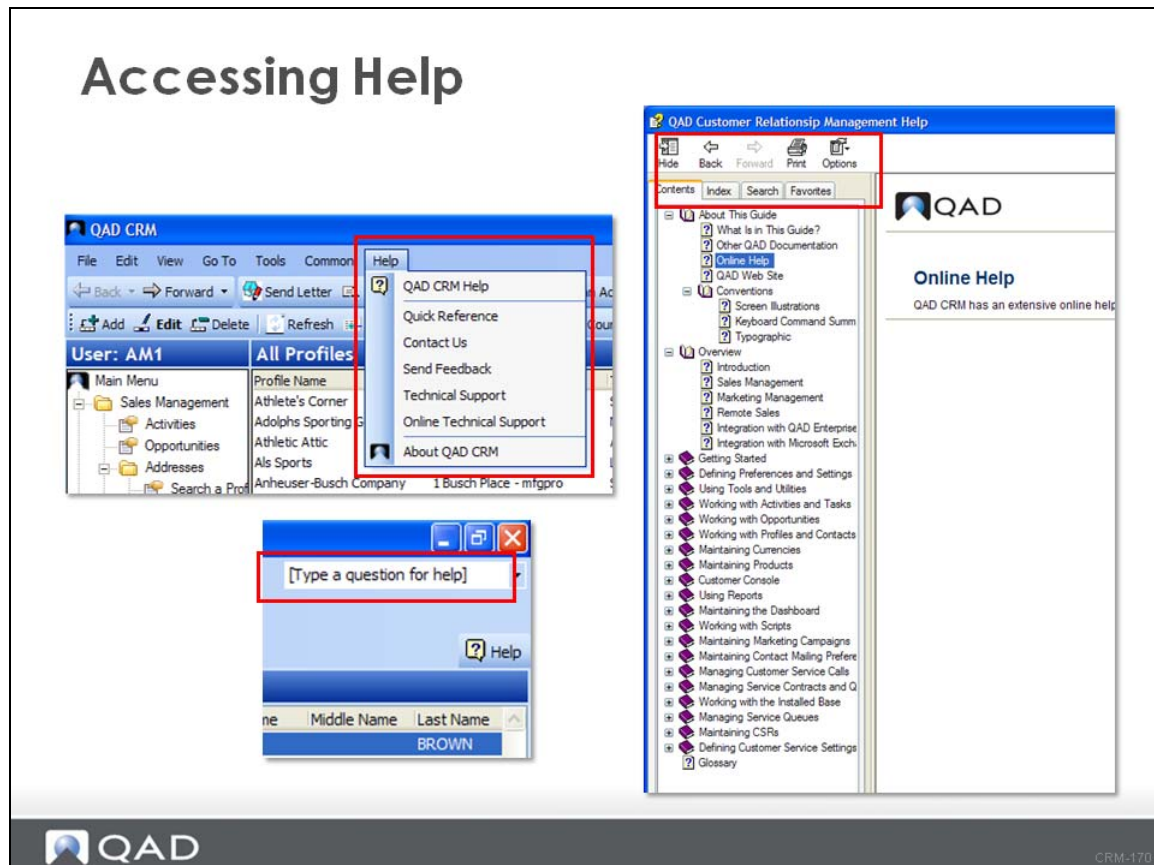
The QAD CRM Menu appears in the sidebar. Menu items can be expanded or collapsed. Click the name of the menu item you want to display.

Navigate All Profiles

- 1 Expand the Sales Management Menu Item.
- 2 Expand the Addresses Menu Item.
- 3 Click All Profiles.
- 4 The Workspace appears. The top half is a browser displaying a list of the data records for the selected module and the bottom half displays the selected record detail in edit mode. Depending on the selected menu item the work space can include other information.
- 5 Select the letter **A**.
- 6 Scroll down and select ACME STEEL.
- 7 The workspace browser contains two windows: Profile List and Contact List. The contacts for ACME STEEL appear in the contact workspace browser
- 8 You can resize the menu and workspace areas by dragging the vertical resize bar to the right or left. You can also resize the area displaying the bars by dragging the horizontal resize bar up or down.

- 9** QAD CRM lets you select the column labels you want to display in the workspace browser. Right-click in the Profile Browser window and choose Show Column.
- 10** The Select Columns for View dialogue box displays. Use the left and right arrow keys to move columns from Hide/Show. Select Fax No and move to the Hidden Columns:
- 11** Click the green Commit check mark to save your change.

Accessing Help



To learn more about navigation in QAD CRM go to Online-Help. To access the on-line help:

- The system has a Help button on each screen in the system toolbar.
- There is also a text box above the Help button where you can enter a specific question. The relevant help file for your question opens in a separate window.
- Help can also be accessed from the Application menu.

Printing Help Topics

You can print help topics. Let's look up and print information about All Profiles:

- 1 Select Help from the Application menu.
- 2 Expand Working with Profiles and Contacts in the sidebar menu.
- 3 Select Working with Profiles and Contacts | Overview.
- 4 The Overview Section displays in the workspace.
- 5 Click Print at the top of the page.
- 6 The Print Topics dialog box displays.
- 7 You can print the selected topic or the selected heading and all subtopics.

QAD CRM Security

Security in QAD CRM involves the following system features or components:

- Login Security - This is password protected: You are allowed three login attempts. If you have not entered a valid user ID after three attempts the Logon screen closes.
- Business Units: Each user is assigned a business unit which can be a branch office, subsidiary, or business partner. A user can be assigned to one or more business units and is allowed to access data for the assigned business unit.
- Teams - A team is a group within a business unit. Users can be assigned to one or more teams and are able to access the data of their assigned teams. For example, if you are assigned to the Northeast Sales Team you are able to view all the sales orders that are entered for your team.
- Permission Groups - are maintained by the System Administrator and control access to system objects such as menus, programs and screens.

The QAD CRM Administrator is responsible for creating and maintaining user profiles in the system. This information is discussed here so you have a high-level understanding that your data and transactions are secure.

User Preferences and Details

User: AM1

Details

User ID: AM1

Manager: [Field]

Department: Sales

Position: Account Manager

Permission Group: [Field]

Last login time: Mar-26-2009, Thu 10:32

Time zone: GMT-8

Mail server: [Field]

Mail server name: [Field]

Mailbox: [Field]

Email: [Field]

Notes: [Field]

Phone numbers and Email:

Ext/Direct Tel: [Field]

Mobile No: [Field]

Fax Number: [Field]

Home Tel: [Field]

Business Email: am1@gms.com

Private Email: [Field]

Address:

Address: [Field]

Type: Normal

Language: ENGLISH

Account expires: ☒ Never ☐ End of

Security:

Password: [Field]

Confirm Password: [Field]

Change Password

System Administrator ☐

Former Employee ☐

A QAD CRM System Administrator is responsible for setting up CRM users. This setup includes associating a user with a business unit, permission groups, mail server, language, initial password, holidays, teams and other information.

As a user you have access to view your settings and also to change some of your details. The extent of your access will vary depending your organization.

For the purposes of this class, we review the system and detail settings for AM1 - Account Manager One or Demo. The changes that we make will be used in exercises later in this class.

Review My Preferences Settings

- 1 Navigate to Sales Management | My Settings | Preferences. The Preferences Dialogue Box displays. There are a number of tabs: General, Email, Profile Find Cursor, Report Settings, Regional Settings, and Exercise Settings.
- 2 Click “?” in the right-hand corner to access Help.
- 3 In Help from the Contents Tab, navigate to Defining Preferences and Settings | Setting General Preferences. Your System Administrator will set these settings for you.
 - a Instructor-Led Training: Your instructor will review each setting with you.
 - b Self-Paced Training: Review each tab in Help.

- 4 Do not save any changes. Click the red X to exit.

Review My Details Settings

- 1 Navigate to Sales Management | My Settings | Details. The Details screen displays your personal details. Always check this screen to ensure that the information is accurate.
- 2 Click? in the right-hand corner to access Help.
- 3 In Help from the Contents tab, navigate to Defining Preferences and Settings | Maintaining Personal Details.
 - a Instructor-Led Training: Your instructor will review each setting with you.
 - b Self-Paced Training: Review each field in Help.
- 4 Click the Ext/Direct Tel Field. The Phone/Fax dialogue displays. Enter your phone and Click the green check-mark in the lower right-hand corner.
- 5 Click Save All the Changes to save and exit.

Important Do NOT change your password.

Exercise - Update Personal Details

Exercise – Update Personal Details

The screenshot shows the 'Update Personal Details' form in the QAD CRM application. The form is titled 'User: demo' and 'Details'. It contains various fields for user information, including User ID, Manager, Department, Permission Group, Last login time, Time zone, Mail server, Mail server name, Mailbox, Email, Notes, Type (Employee), Language, System Administrator, Former Employee, Account expires (Never, End of), Security, Password, Confirm Password, Address, and Address. A callout box highlights the fields: Mobile Phone, Email Address, and Address.

Complete the following hands-on exercise to test your knowledge on changing your personal details.

- 1 Enter a mobile phone number.
- 2 Enter your work email.
- 3 Enter your address.
- 4 Save your work.
- 5 Logout.

Getting Started - Knowledge Check

Getting Started – Knowledge Check



- Complete the Knowledge Check by filling in the blanks with the correct answer or indicating if the statement is "True" or "False".
- If you are attending Instructor-Led Training your instructor will discuss your answers.
- Self-Paced Training participants follow the instructions to log problems or get help.
- The answers to the Knowledge Check are in the back of the Training Guide.



CRM-200

- 1 QAD CRM supports multiple languages. (True or False?)
- 2 QAD CRM allows _____ login attempts. After _____ incorrect attempts QAD CRM shuts down.
- 3 After selecting a record the QAD CRM workspace contains one or more browser windows in the upper half of the screen. What is contained in the lower half of the screen?

- 4 QAD CRM has the following security: login, business unit, _____, and permission group. (Fill in the blank.)
- 5 QAD CRM Help can be accessed on-line and can also be printed. (True or False?)

Getting Started - Key Points

Getting Started – Key Points

- Review the Chapter Key Points



- Questions?



CRM-210

- QAD CRM and QAD product suite do not share the same navigation. QAD CRM does not use .NET UI or process maps.
- QAD CRM supports multiple languages. You are prompted for a language during logon if your organization uses more than one language.
- Help in QAD CRM is easy to access on-line. You can print on-line help by topic or topic and all sub-topics.
- Your information is secure in QAD CRM but can also be shared by business unit and teams.
- You are able to review and change your personal details.

Chapter 3

Profiles

Profiles - Overview

Profiles - Overview

The Profile Record is the center of all QAD CRM Information.

Navigate to the All Profiles Screen:
Sales Management | Addresses | All Profiles

In this chapter you gain an understanding of the Profile Record and how to manage your profiles effectively. The Profiles record forms the core of the QAD CRM system as all contact and opportunity information is associated with a Profile.

Learning Objectives

- Describe the Profile Record.
- List the data that is contained in a Profile.
- Search for a Profile
- Add a Profile

Select Profile Type(s)

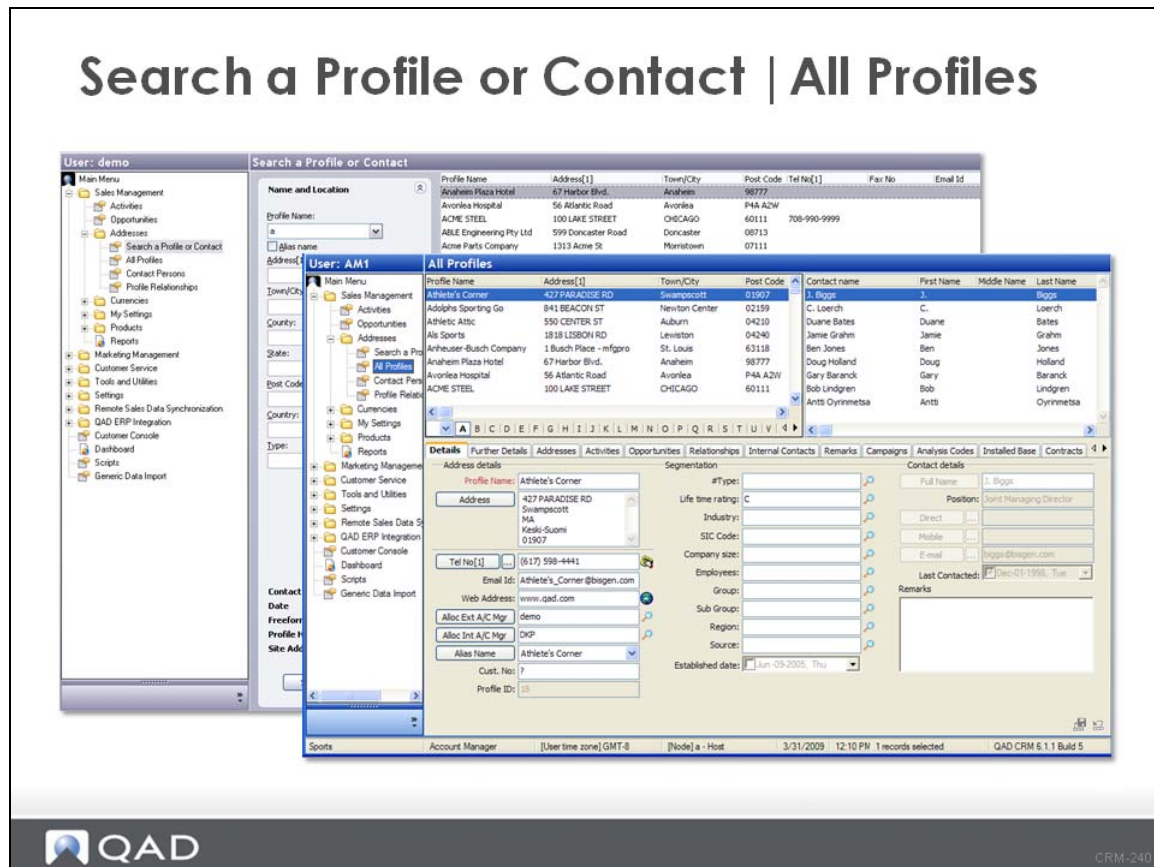
The screenshot displays the QAD CRM interface with a 'Select Profile Type(s)' dialog box open. The dialog box has a title bar 'Select Profile Type(s) (170)' and a list of checkboxes for profile types: Competitor, Customer, Enduser, Not Relevant, Other, Partner, Prospect, Supplier, and Unclassified. A red arrow points from the 'Profile Name' field in the background form to the '#Type:' field in the dialog. The background form shows details for 'Ask Us Sports' with address '52 S WASHINGTON AVE, Bergenfield, NJ 07621' and phone '(201) 385-8378'.

- A profile is a business or business relationship that has an association with your organization.
- A profile can be a Customer, Competitor, Partner, Supplier or any other business or business relationship that your organization needs to track.
- QAD CRM also tracks complex business relationships. If your Customer is also a Supplier you would designate both types for this profile. QAD CRM supports the ability for a Profile to contain multiple Profile Types.
- Your organization defines the types of business relationships by providing the look-up values for the Profile Type field.

What information is contained in a Profile?

- Profiles either contain or are associated with all the information you need for a 360 degree view of your business relationship including addresses, contacts, opportunities, installed base products, contracts and more.
- Information is displayed on-line in the following tabs: Details, Further Details, Addresses, Activities, Opportunities, Relationships, Internal Contacts, Campaigns, Analysis Codes, Installed Base, Contracts, User Defined Fields, Attachment, Script and Issues.

Search a Profile or Contact | All Profiles



How many customers, prospects, suppliers, competitors, partners or other business relationships are you tracking on QAD CRM? You can track an unlimited number of profiles, however, you need to access your profiles quickly and efficiently.

QAD CRM provides powerful search facilities to help you locate specific profiles. You can search for specific profiles/contacts using search criteria or you can display all your organizations's profiles or profiles based on the first letter of the profile name. The two screens that you use to locate your profiles are:

- Search a Profile or Contact Screen
- All Profiles Screen.

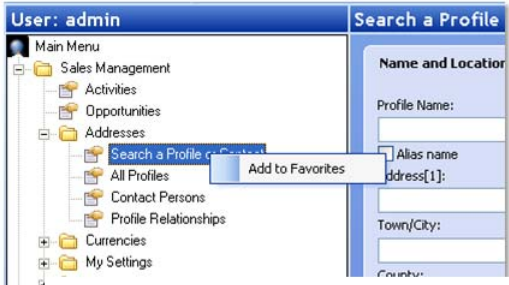
The navigation and search capabilities of each screen are a little different, but certain QAD features apply to most searches in QAD CRM. For instance, you can generate a report of your search results, send information to QAD ERP or export your search from most screens.

Let's explore the Search a Profile or Contact Screen.

As you use this screen daily it is important that you can quickly to access it.

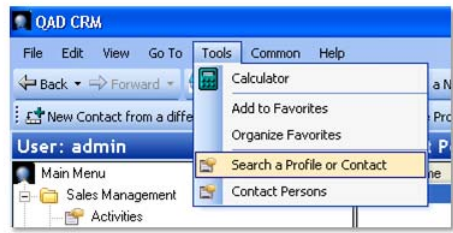
Steps - Create a Favorite

Steps – Create a Favorite



Create a favorite:

1. Main Menu>Sales Management>Addresses>Search a Profile or Contact
2. <Right Click> Add to Favorites
3. Select Arrow
4. Access from Tools

QAD

CRM-250

You can access screens from the CRM Menu or you can create a favorite for those screens that you will use every day. Favorites appear in the Application Menu Bar under Tools and also in the QAD CRM Bar (at the bottom of the QAD Menu Bar).

Creating a Favorite

- 1 Navigate to: CRM Menu | Sales Management | Addresses | Search a Profile or Contact.
- 2 Right-click, Search a Profile or Contact.
- 3 Add Favorite Dialogue Box displays - select Add to Favorites.
- 4 Save by Clicking on the green arrow in the lower right-hand corner.
- 5 Favorite created in two places:
 - Application Menu Bar under Tools
 - QAD CRM Bar

Search Options in Profiles and Contacts Screen

Search Options in Profiles and Contacts Screen

Search a Profile or Contact

Name and Location

Profile Name:

☐ Alias name

Address[1]:

Town/City:

San Diego

Country:

States:

Post Code:

Countries:

Types:

Customer

Contact

Date

Freeform

Profile History Text

Site Address

Search **New Search**

Open/Selected Criteria Tab

Search a Profile or Contact

Name and Location

Contact

Date

Freeform

Look for:

☒ Profile

☐ Contact

☐ Site Address

☐ Tx. History

Field

Tel No[1] (prospect.tel[1])

Condition

begins

Value

(508)

You can perform a search based on any of the criteria described above. The Search Criteria is displayed in the Open/Selected Criteria Tab. Scroll thru and select the criteria by Clicking on the arrow to the right of the Criteria Topic

Search Criteria

Search Criteria	Search By
Name & Location	Profile or alias, name, address, town/city, county, state, post code, country, profile type
Contact	Name details, position description, mail groups
Date	Date range will display all records created or modified during the selected period. Can choose profiles or contacts and search by creation or modification dates.
Freeform	Profile, Contact, Site Address or Transaction History Fields using a condition
Profile History Text	Keyword or phrase
Site Address	Any or all of the following fields: Profile Name, site address, town/city, county, state, post code and country


CRM-260

The system searches based on information entered in the open or selected Search Criteria Tab. Information entered into other tabs is not taken into account.

Steps - Search a Profile or Contact

Steps – Search a Profile or Contact

Profile Name	Address[1]	Town/City	Post Code	Tel No[1]	Fax No	Email Id
PEI Computers Ltd.	37 Atlantic Road	Avonlea	A1A A1A	602-759-0293	602-759-2333	
Products Warehouse	Central Supply Division	Phoenix	85044	805-923-1254	403-237-2840	
PBU Customer	multi-database EMT			614-789-3412	403-289-4832	
Plastic Supply Corporation	A Division of Hughes Intl.	Oxnard	90293	614-778-4000		

Select Town/City (256)

Town/City	Country
Ocala	
Oceanside	
Okeechobee	
Old Saybrook	
Ontario	
Opelika	
Orlando	
Oroville	
Osceola	
Ottumwa	

Field: Town/City Condition: begins Value:

Department: Mail groups:

QAD CRM-270

Scenario

As an Account Manager you might need to view one specific Profile Record or you might need a list of Profile Records based on search criteria.

In this scenario, you plan a business trip to Orlando, Florida. You want to review your Orlando Customers and call them before the trip if appropriate.

You need a list of all Customer Profiles in Orlando, Florida.

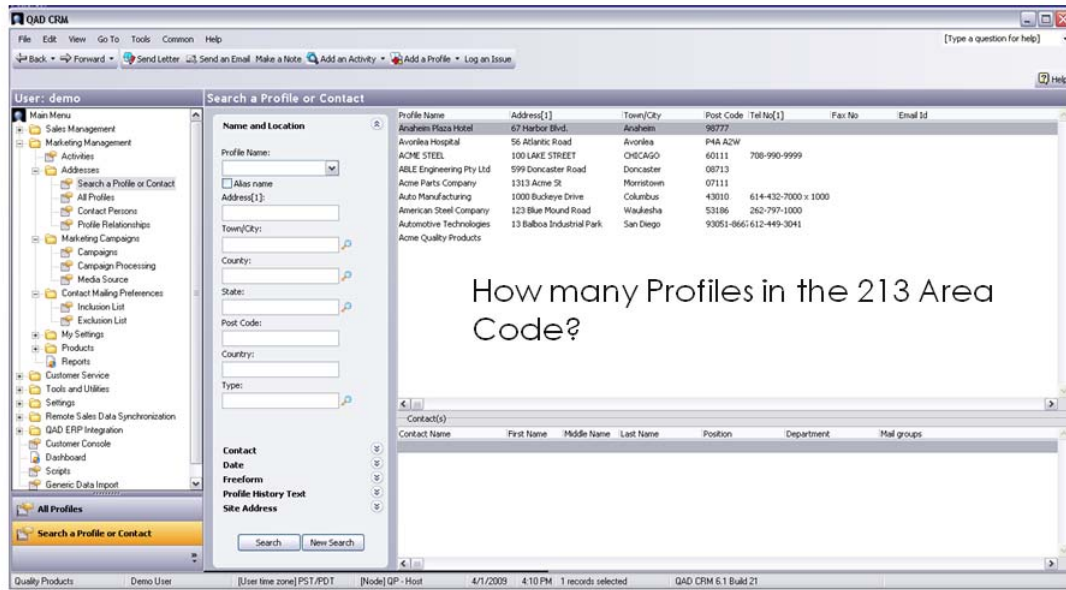
- 1 Navigate to the Profile & Contact Search Screen (you can use the Favorite that you just created).
- 2 Scroll to the Name and Location Topic using the Criteria Topic Select Arrows.
- 3 In the Town and City Field enter Orlando or use the look-up icon.
- 4 In the State Field enter FL or use the look-up icon.
- 5 In the Type Field use the look-up, review the types and select Customer. Please note that you could select more than one Profile Type.
- 6 Click the Search Button at the bottom of the Search Criteria Tab.
- 7 Two Customer Profiles located in Orlando, Florida are returned to the workspace.

- 8 You can review the details of a specific profile by highlighting the profile, right-clicking and choosing Profile from the drop-down list.

Note If the search does not return any records, you are prompted to create a new Profile.

Exercise - Search a Profile or Contact

Exercise – Search a Profile or Contact



Complete the following hands-on exercise to test your knowledge on how to use the Search a Profile or Contact Screen.

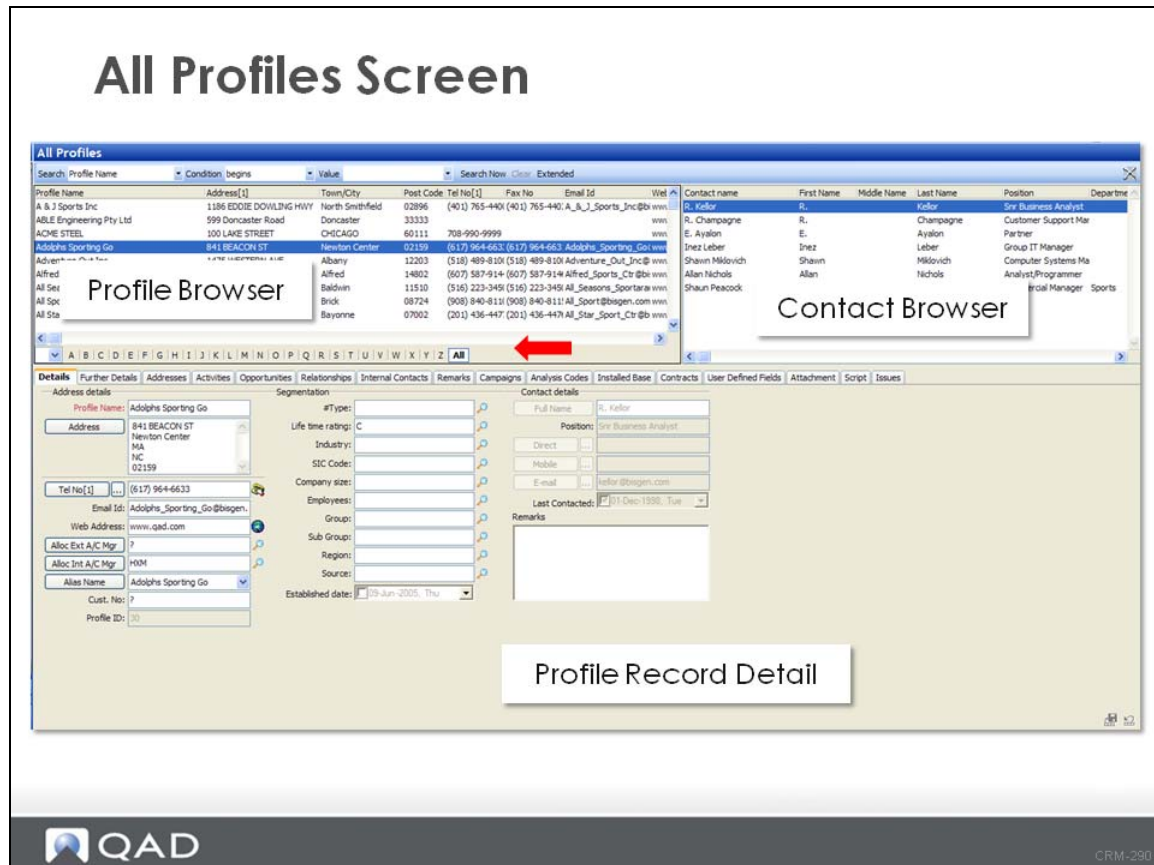
Hands-on Scenario

You want to return a phone message from one of your customers, but you can't quite make out the name of the customer or the complete phone number. The call was placed from Los Angeles - 213 Area Code. If you can review a list of all profiles in the 213 Area Code you think you'll be able to identify the customer's name.

- 1 If you have not created a Favorite for the Search a Profile or Contact Screen, do so now.
- 2 Navigate using your new Favorite.
- 3 Search for all Profiles in the 213 Area Code. (Hint: Use the Freeform Search Topic.)

Bonus Question You'd like a list and count of all Profiles created in the last 12 months. How would you get this information using the Search a Profile or Contact Screen.

All Profiles Screen



The All Profiles Screen accesses all the Profiles and Contacts in the database. The screen has three (3) parts: Profile Browser, Contact Browser and Profile Record Detail:

Profile Browser

- Contains a list of Profiles based on:
 - first letter of the Profile Name (A, B, C)
 - all Profiles by selecting the All Button
 - searching by using a filter (filters can be stored and re-used).

Contact Browser

- Displays all Contacts for the selected Profile in the Profile Browser Window.

Profile Record Detail

- Displays the details for the selected Profile in the Profile Browser Window in Edit Mode.

Note Pay close attention to the filter option as it works with all other search options. For instance, if there is an existing filter for displaying Customer Records and you selected the **A** Button, only those Profiles beginning with the letter **A** containing a Customer Type of Customer would display.

Steps - All Profiles

Steps – All Profiles

- Create Default Filter
- Browser Report
- Export to Excel

QAD CRM 6.1 Build 21

Scenario

In this scenario you use the All Profiles Screen to gather general information about Profiles and Contacts. Let's list your Profile requests and then go through each one.

- Every time you open the All Profiles Screen you would like to see all the Profiles in the State of California.
- You need a list and a count of all Profiles, sorted by Town/City.
- You want to create a report and export the data to Excel.

Set All Profiles to display Profiles in the State of California

Create a default filter for all California Profiles:

- 1 Navigation: Sales Management | Addresses | All Profiles.
- 2 Access the Filter Tool Bar: View | Toolbars | Filter.
- 3 The Filter Toolbar displays two objects - the Filter Drop-down list with previously created filters and the Profile Filter Screen Button that displays a dialogue box where you can create, edit or delete filters.
- 4 Click the Filter Drop-down list and set it to No Filter.

- 5 Click the All Button in the Profile Browser. The Profile Browser displays all Profiles.
- 6 Notice that the Profiles are not sorted in any particular order. To sort by Profile Name, Click the Profile Name Label. Displayed in the Profile Browser is a list of all Profiles sorted by Profile Name.
- 7 Click the Filter Button to display the Profile Filter screen to create a new filter. The Profile Filter Screen opens the selected Filter in edit mode.
- 8 To add a new filter Click the Add Button in the lower right-hand corner of the screen. The Add Button is the first button going left to right. A blank Profile Filter is displayed
- 9 Enter California in the Name the Filter Field.
- 10 Select the Default Filter Check Box to make this the default view of the Profile Filter Screen.
- 11 In the State Field use the look-up icon and select California and select the green check mark to save your selection.
- 12 When you return to the Profile Filter Screen select the green check mark at the bottom of the screen to close the screen and save your work.
- 13 The California Filter triggered when you saved your work and the Profile Browser should only contain those Profiles from California.

Note To learn more about the Profile Filter Screen go to [Help | Working with Profiles and Contacts | Filtering Profiles](#)

Create a list and a count of all Profiles sorted by Town/City

- 1 Navigate to the All Profiles Screen. Check that there is not an active filter.
- 2 Click the All Button in the Profile Browser. The Profile Browser is populated with all the Profiles in the database.
- 3 To sort the Profiles by Town/City, Click the Town/City Name Label.
- 4 To obtain a Record Count, Right-click in the Profile Browser and choose Record Count.
- 5 To create a report of the data in the Profile Browser, Right-click and choose Report View to generate a Browser Report.

Export the Browser Report to Microsoft Excel

- 1 Review the Report. To export the report to Microsoft Excel, Click the Export Button in the toolbar.
- 2 Choose Export to Application and move to the next screen.
- 3 Select Microsoft Excel (.xls) and Click the green check mark.
- 4 Review the spreadsheet, format and save in Microsoft Excel.

Exercise - All Profiles

Exercise – All Profiles

The screenshot shows the QAD CRM 'All Profiles' screen. The left sidebar contains a navigation menu with options like Sales Management, Marketing Management, and Customer Service. The main area displays a table of profiles. The 'Favorite Supplier' profile is highlighted. A text box overlay on the right says 'Identify all our Suppliers – Who are they?'.

Profile Name	Address[1]	City	Post Code	Tel No[1]	Fax No	Email Id
Freightliner	P.O. Box 3591	Portland	97208			
Favorite Supplier	333 Peachtree Street NE	Atlanta	30303			
Favorite Customer	333 Peachtree Street NE	Atlanta	30303			
Favorite Self Bill Customer	303 Peachtree Street NE	Atlanta	30303			
FastFood Corporation	123 Burger Ct.	Fullerton	92222			

Complete the following hands-on exercise to test your knowledge on how to use the All Profiles Screen.

Hands-on Scenario

You need a list of all Suppliers.

- 1 Create a Favorite to the All Profiles Screen.
- 2 Create a Supplier Filter.
- 3 Create a Browser Report from your output.

Bonus Question Review the Criteria Tabs in the Profile Filter Screen. What Tab and Field would you filter on to accomplish the following filters:

- Limit who can access a filter.
- Generate a list of all Profiles that have a high priority for Service Calls.
- Create a filter for the Customers in the State of California, sorted by phone number.

How to add a Profile

How to add a Profile

Profile Name	Address[1]	Town/City	Post Code
Anaheim Plaza Hotel	67 Harbor Blvd.	Anaheim	98777
Avonlea Hospital	56 Atlantic Road		
ACME STEEL	100 LAKE STREET		
ABLE Engineering Pty Ltd	599 Doncaster Road		
Acme Parts Company	1313 Acme St		

- Add a Profile Button from Common Tool Bar
- Right Click All Profiles Browser Window
- File | Add (All Profile Screen)

QAD CRM supplies a Quick Profile Add and a Detailed Profile Add:

- Add a Profile Screen - Quick Profile
- Add a Profile Wizard - Detailed Profile.

There are many ways to access the Detailed Profile Wizard including:

- Add a Profile button from the Common Toolbar
- Right-click in the All Profiles Browser Window
- File | Add from the All Profiles Screen.

The Quick Profile option is accessed from the Add a Profile button.

Warning

- Do not add duplicate Profiles. Search first! Always Search to ensure that you are not adding duplicate data.
- QAD CRM issues a warning message if the Profile has the same Name and Postal Code. Profiles with the same Name and a different Postal Code are not considered duplicates.
- QAD CRM does not stop you from adding duplicate data - be careful.
- QAD CRM is not case sensitive, enter data that can be used in letters and memos.

Steps - Profile Wizard

Steps – Profile Wizard

The screenshot shows the 'Profile Add Wizard' window. The 'Details' tab is selected in the sidebar. The main area contains two sections: 'Address Details' and 'Segmentation'. The 'Address Details' section includes fields for Profile Name, Address, Tel No, Email Id, Web Address, Alias Name, Cust. No, and Profile ID. The 'Segmentation' section includes fields for Type, Life time rating, Industry, Sic code, Company size, Employees, Group, Sub Group, Region, Source, and Established Date. A 'Remarks' text area is on the right. A callout box points to the 'Details' tab with the text: '• Add Profile Information' and '• Review Profile Fields'.

The Profile Add Wizard displays the following information tabs: Details, Further Details, Contacts, Addresses, Analysis Codes, and User Defined Fields.

Note

- The information tabs displayed when adding a Profile are a subset of the information that can be added.
- When you display an existing Profile you will notice additional Tabs.
- A complete list of all fields stored in the Profile Record is detailed in Help | Working with Profiles and Contacts | Working with Profiles | Maintaining Profiles.

In the following scenario, we review step-by-step how to use the Profile Add Wizard and explore some of the data stored in the Profile Record.

Scenario

As an Account Manager you receive information on prospective customers or leads from many sources including your own research and leads from the Marketing Department. Your organization's business process dictates that prospective customers are tracked as prospects until they have placed an order and all Profiles.

Prospective customer leads from Marketing or other sources, can include a contact name, a complete address, the size of the company, number of employees, and other information that is tracked in QAD CRM. Most of the time you receive very little information. It's up to you to research your customer leads and add information in QAD CRM.

This morning you received a lead from the Marketing Department that was generated from a seminar. The lead contains the following information:

- Company Name: Boulder Industries
- Address: 1500 28th Street, Boulder CO 80303
- Contact: None Given
- Company Size: Around 400 Employees Worldwide - 2 million in revenues
- Business: Distribution

Create a Profile for this new lead in QAD CRM so you can easily track and report on all your sales activities as you contact and research this company. Remember that the data you enter will be re-used in letters, marketing campaigns, and reports. Enter Profile names using upper and lower case, correct punctuation and abbreviations.

- 1 **Search First!** Navigate to the Search a Profile or Contact Screen.
- 2 Profile Name = *Boulder Industries*.
- 3 Click the Search Button.
- 4 Boulder Industries is not in QAD CRM. You are prompted to add a new profile.
- 5 Click - Yes.
- 6 Profile Add Wizard -Account Detail Tab is displayed. The Profile Name field is auto filled based on your search criteria and the label is in **red** indicating a required field.
- 7 **Details Information:** If there is a button next to the field label, select the button rather than entering free-form information. If your system administrator has defined a field style, using the button will open a dialog box which reflects the defined style. If there is a look-up icon, use the look-up to get the exact spelling of a value.

Enter the Details Information that you know.

- Address = *1500 28th Street, Boulder CO 80303*
- Type = *Prospect*
- Company Size = *2-5 Million*
- Employees = *100-499*
- Region = *US*
- Source = *Seminar/Conference*

- 8 **Further Details:** Select Further Details from the sidebar or use the green arrow in the lower right-hand corner to move to the next tab.

Enter the Further Details Information that you know.

- Ext. Account Manager = *AM1 (yourself)*
- Time Zone = *MST/MDT (Mountain Time)*

The Ext/Int Account Manager fields can be pre-populated through the Territory Management Module or you can use the Alloc Buttons or Lookup. The Alloc Buttons display the account managers based on Territory Management assignments. The Lookup Button displays the names of all Account Managers.

- 9 You do not have enough information for the Contacts, Addresses, Analysis Codes, or User Defined Codes Tabs at this time.
- 10 Save your new Profile by Clicking the green arrow in the lower right-hand corner.
- 11 You are prompted to send this new Profile to QAD ERP.
- 12 QAD CRM notifies you that QAD ERP is now updated with this Profile.
- 13 Click, OK. The Profile displays showing all associated tabs such as Campaigns, Opportunities, Installed Base, Contracts, and Script.
- 14 Review the new Profile. A Contact has been added with a Last Name = *Sir/Madam* as you did add a Contact Record for this Profile.

Note Profiles must have at least one Contact. If you do not enter a Contact, the system adds a generic contact for you.

Exercise - Adding a Profile

Exercise - Adding a Profile

Complete the following hands-on exercise to test your knowledge on how to add a Profile.

Hands-on Scenario

In a conversation with one of your customers you learned about a company that is a good match for your organization's goods and services. Before you start to research this company you want to add them QAD CRM so you can easily track your sales activities.

1 You know the following information about this company:

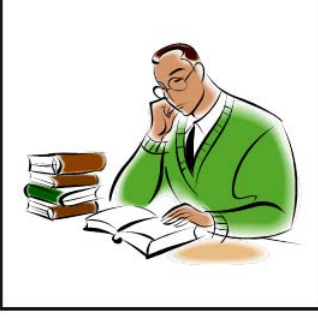
- Company Name (use your Last Name Enterprises)
- Address (use an Address in Your Town)
- Email (use your work email)
- Size (300 Employees, 3 Million in Sales)

2 Enter, Save, Send to QAD ERP.

Bonus Question: You know this company does business not only in the United States but also in Australia. Where would you add this information so you could easily report on it later?

Profiles - Knowledge Check

Profiles – Knowledge Check

	• Complete the Knowledge Check by filling in the blanks with the correct answer or indicating if the statement is "True" or "False". • If you are attending Instructor-Led Training your instructor will discuss your answers.
	• Self-Paced Training participants follow the instructions to log problems or get help. • The answers to the Knowledge Check are in the in the back of the Training Guide.


CRM-350

- 1 QAD CRM is Profile Centric which means that all information in QAD CRM must be associated with a Profile. (True or False?)
- 2 List four Profile Tabs and two data elements in each tab:
Example: Opportunity Tab - Stage Date, Sales Person
- 3 Profile Name and _____ make a Profile unique.
- 4 If you do not locate a Profile using the Search a Profile or Contact Screen you are prompted to:
 - a Add a New Profile
 - b Try again with different search criteria
 - c The Profile closest to your search criteria is returned
- 5 Your system administrator can help you enter fields in the correct format by defining the field style. You can choose the button to the left of the field and a dialogue box will open in the correct style for you to enter the field information. Name a field that is set up this way in the QAD CRM Training environment:_____.

- 6 When you add a Profile, QAD CRM will also add a generic Contact if you do not add a Contact. (True or False?)
- 7 Favorites are created in two places: Application Tool Bar and the _____.
- 8 QAD CRM is not case sensitive. Why is it important to be case consistent and have data entry standards when entering Profiles in QAD CRM?_____
- 9 Filters can be created and stored for future use. (True or False?)
- 10 The All Profiles Screen displays the following windows: Profile Browser, Contact Browser and the _____.

Profiles - Key Points

Profiles – Key Points

- Review the Chapter Key Points



- Questions?



CRM-360

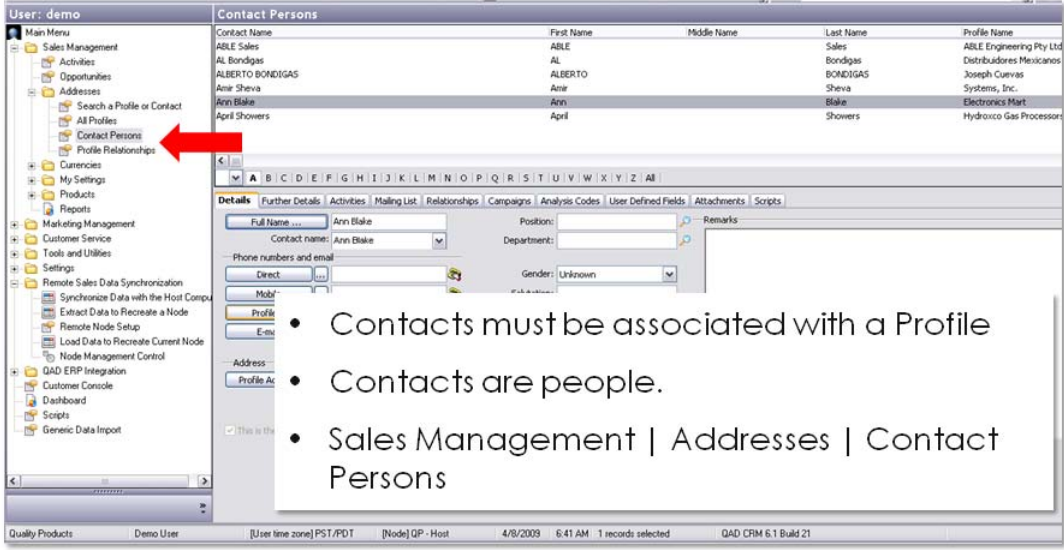
- The Profile Record is the center of QAD CRM. All data in QAD CRM must be associated with a Profile.
- There are two search screens:
 - Search a Profile or Contact
 - All Profiles Screen
- Always Search for a Profile BEFORE adding!
 - Do not add duplicate data.
 - QAD CRM will give you a duplicate Profile message if you try to add a Profile/Postal Code combination that already exists.
- The Profile Name is the only required field in the Profile Record.
- A Profile can be a Supplier and a Customer - complex business relationships are maintained using multiple profile types.
- You can send new Profiles to QAD ERP.

Chapter 4

Contacts

Contacts - Overview

Contacts - Overview



The screenshot displays the QAD CRM interface. On the left is a navigation menu with categories like Sales Management, Marketing Management, and Customer Service. The 'Contact Persons' link under 'Sales Management' is highlighted with a red arrow. The main window shows a table of contact persons and a detailed view for 'Ann Blake'.

Contact Name	First Name	Middle Name	Last Name	Profile Name
ABLE Sales	ABLE		Sales	ABLE Engineering Pty Ltd
AL Bondgas	AL		Bondgas	Distribuidores Mexicanos
ALBERTO BONDIGAS	ALBERTO		BONDIGAS	Joseph Cuevas
Amir Sheva	Amir		Sheva	Systems, Inc.
Ann Blake	Ann		Blake	Electronics Mart
April Showers	April		Showers	Hydroco Gas Processors

The 'Details' view for 'Ann Blake' shows fields for Full Name, Contact name, Position, Department, Phone numbers and email, Gender, and Address. It also includes buttons for 'Mobile', 'Profile', 'Email', and 'Address'.

- Contacts must be associated with a Profile
- Contacts are people.
- Sales Management | Addresses | Contact Persons

Quality Products Demo User [User time zone] PST/PDT [Node] QP - Host 4/8/2009 6:41 AM 1 records selected QAD CRM 6.1 Build 21

QAD CRM-370

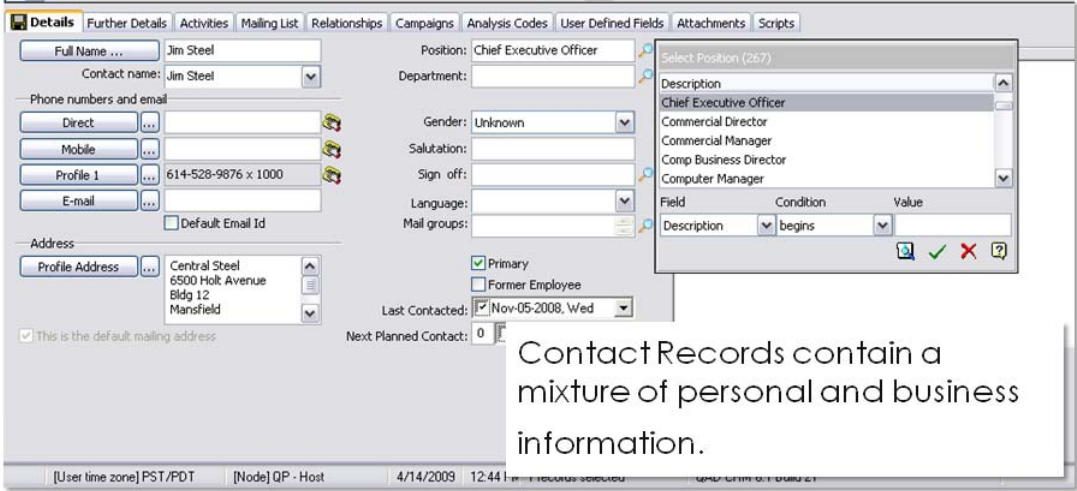
In this chapter you gain an understanding of the Contact Record, how to manage your contacts effectively, and how the Contact and Profile Records work together. Contacts are people who work for or are associated with a Profile.

Learning Objectives

By the end of this chapter, you will be able to do the following:

- Describe the Contact Record
- List the data that is contained in a Contact Record
- Search for a Contact
- Add a Contact

Contact Details



Contact Details

Full Name: Jim Steel
Contact name: Jim Steel

Position: Chief Executive Officer
Department:

Gender: Unknown
Salutation:
Sign off:
Language:
Mail groups:

Phone numbers and email:
Direct: ...
Mobile: ...
Profile 1: 614-528-9876 x 1000
E-mail: ...

Address:
Profile Address: Central Steel
6500 Holt Avenue
Bldg 12
Mansfield

Default Email Id: ☐

This is the default mailing address: ☒

Last Contacted: Nov-05-2008, Wed
Next Planned Contact: 0

Select Position (267)
Description
Chief Executive Officer
Commercial Director
Commercial Manager
Comp Business Director
Computer Manager

Field	Condition	Value
Description	begins	

Contact Records contain a mixture of personal and business information.

[User time zone] PST/PDT [Node] QP - Host 4/14/2009 12:44

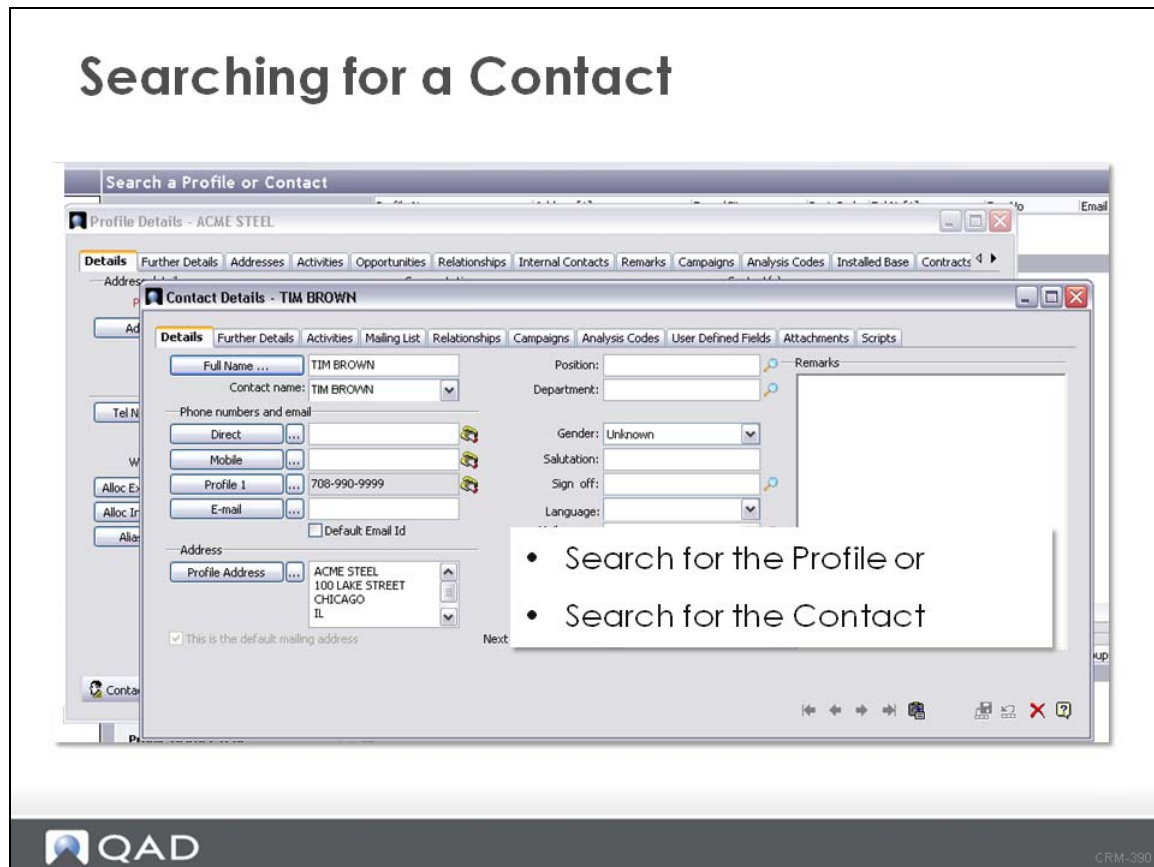
QAD CRM-380

- A Contact is a person who is associated with one or more Profiles.
- It's important to remember that Contacts are people vs. organizations. Those business activities that need interaction with a person should be associated with a Profile and a Contact.
- Your organization maintains relationships with Profiles through Contacts.
- Internal Contacts are people who work for **your** organization and have an association with a Profile. Internal Contacts are added and maintained using the Internal Contact Tab on a Profile. Internal Contacts must be in the User File.

What information is contained in a Contact?

- Contact Records contain a mixture of personal and business information. Personal information includes how to best communicate with the individual as well as information that includes their hobbies and family members.
- Information is displayed on-line in the following tabs: Details, Further Details, Activities, Mailing List, Relationships, Campaigns, User Defined Fields, Attachments, and Scripts.

Searching for a Contact



QAD CRM provides the same search facilities to help you locate specific Contact Records that you used earlier to search for Profile Records. You can search directly for the Contact Record or you can search for the Profile that the Contact is associated with. The two screens you use to locate your contacts are:

- Search a Profile or Contact Screen
- Contact Persons Screen.

You already know how to use the Search Profile or Contact Screen and the All Contacts Screen from the Profile Chapter. Navigation in the Contact Persons Screen is very similar to the All Profiles Screen.

Let's step through the navigation for both of these screens using a scenario.

Steps - Searching for a Contact

Steps – Searching for a Contact

Search a Profile or Contact

Contact Name	First Name	Middle Name	Last Name	Profile Name
TIM BROWN	TIM		BROWN	ACME STEEL

Contact Persons

Contact Name	First Name	Middle Name	Last Name
TIM BROWN	TIM		BROWN
Truck Manufacturing Plan	Truck Manufacturing		Plan
Tyrone Wilson	Tyrone		Wilson

QAD CRM-400

Scenario

You receive a cell phone message from one of your customers - Tim Brown asking you to contact him. You want to understand the status of the account and review your last interactions with Tim. Let's search for and review Tim's company and personal information.

Profile & Contact Search

- 1 Navigate to the Profile & Contact Search Screen
- 2 Scroll to the Contact Topic using the Criteria Topic Select Arrows.
- 3 Enter Brown in the Last Name Field.
- 4 Click the Search Button.
- 5 The Contact Record for Time Brown displays. *You cannot open the record by Double-Clicking.* Right-click and a list of options appear.
- 6 Choose the Contact option to display the Contact Record for Tim Brown.

Note If you choose the Profile option the Profile would open and the Contact would also display and you could drill into the Contact Record.

Contact Person

- 1 Let's try the same Search only this time let's use the Contact Persons Screen.
- 2 Navigate to the Contact Persons Screen. Ensure there are no active Filters.
- 3 Select the letter "t".
- 4 All Contacts with a first name beginning with the letter "t" display in the Contact Browser Window.
- 5 Select the Tim Brown Contact Record and the details for the selected record display in the Contact Detail window in Edit Mode.
- 6 Right-click the selected Contact Record and a list of options display. Choose the Copy Details Option to copy and associate the Contact to another Profile. The Copy Contact Dialogued Box displays:
- 7 Click the Select Profile Button. The Search Profile and Contact Screen displays. Search for "Grace" and choose the Grace Resellers Profile.
- 8 Review Tim Brown as a Contact associated with ACME STEEL and Tim Brown as a Contact associated with Grace Resellers. What do you notice?

Adding Contacts

Adding Contacts

Profile Name	Address[1]	Town/City	Post Code	Tel No[1]	Fax No	Email Id
Anaheim Plaza Hotel	67 Harbor Blvd.	Anaheim	98777			
Avonlea Hospital	56 Atlantic Road	Avonlea	P4A A2W			
ACME STEEL	100 LAKE STREET	CHICAGO	60111	708-990-9999		
ABLE Engineering Pty Ltd	599 Doncaster Road	Doncaster	08713			
Acme Parts Company	1313 Acme St.	Morrisstown	07111			
Auto Manufacturing	1000 Buckeye Drive	Columbus	43010	614-432-7000 x 1000		
American Steel Company	123 Blue Mound Road	Waukesha	53186	262-797-1000		
Automotive Technologies	13 Balboa Industrial Park	San Diego	93051	866-612-449-3041		
Acme Quality Products						

- All Profiles Screen
- Select Profile
- Right-click in Contact Browser

There are a number of ways to add a Contact to a Profile. Remember all Contacts **must** be associated with a Profile. Typically you would add a Contact at the time you add the Profile or you can update the Profile with additional Contacts later.

The example above displays adding a Contact to a selected Profile by Right-clicking in the Contact Browser from the All Profiles Screen.

Warning

- QAD CRM allows you to add duplicate Contacts. A Contact can be associated with more than one Profile.
- For instance, a Contact can be the owner of one company and a consultant at another. Both organizations are your customers so you want to track both contact relationships.
- Be cautious when adding duplicate Contacts, ensure that your actions make sense. **Search First!** - before you add Contacts.
- Be aware of your organization's data entry standards. Make sure that the Contact fields are camera ready and can be used in letters, emails and other public facing documents.

Let's add a contact to an existing Contact and review some of the contact fields.

Steps - Adding a Contact

Steps – Adding a Contact

The screenshot shows the QAD CRM 'All Profiles' screen. A table lists various profiles, with 'Custom Homes and Buildings' selected. A right-click context menu is open over the profile, showing options like 'Add Contact', 'Edit Contact', 'Copy Contact', 'Delete Contact', 'Refresh', 'Show Column', 'Sort', 'Record Count', 'Report View', 'Export', 'Report', and 'Search'. The 'Details' tab is active, displaying contact information for Jim DeLaRoca, including address, phone, and email fields.

Profile Name	Address[1]	Town/City	Post Code	Tel No[1]	Fax No	Email Id
Consigned Inventory Customer No Intransit Locations		Chicago	60195			
Consigned Inventory Customer Intransit Location		Albany	990099			
Customer	1212 Customer St	New York	21111			
Colossal Conglomerates LTD	Suite 1000 Colossal Building	Evanson	090876	1-800-333-9000 x 666		
CENTURY HALLMARK	Attention: Accounts Payable	Los Angeles	89000	213-920-0394	213-920-0399	
Custom Homes and Buildings	2670 Tenth Street	Phoenix	85028	602-265-5656	602-898-5560	
Carles Company	Vittorio Square	Rome	00143	39-06-99775	39-02-72331	
Canadian Supply Corp.	Central Distribution Centre	Willowdale	M7E 9F2	416-920-4833	416-920-4888	
Centre D'Affaires	2204 rue de Rivoli	Montreal	X9W 7E2	714-923-0239		

Scenario

While visiting the Custom Homes and Buildings, Jim DeLaRoca your main contact introduces you to his manager Mark Flynn. Add Mark as a Contact associated with the Custom Homes and Buildings. There are a number of ways to do this. For our example below, we add the new Contact from the All Profiles Screen.

- 1 Search first to see if Mark Flynn already exists.
- 2 Display Custom Homes and Buildings in the All Profiles Screen.
- 3 Right-click in the Contact Browser and choose Add Contact from the drop-down menu.
- 4 The Contact Record displays open to the Contact Details tab. The Contact Address field is pre-filled with the Profile Address.
- 5 Add the information address and phone (use your own address). Use the buttons next to the fields to take advantage of any field styles that can be predefined and use the look-ups to choose the correct information. Save your work.
- 6 After adding Mark Flynn, we have enough information to indicate that he reports to Jim DeLaRoca. Right-click Jim DeLaRoca in the Contact Browser and choose Edit Contact.
- 7 Click the Further Details Tab and locate the Reports To Field. Using the look-up icon, select Mark Flynn. Save the record.

- 8 Refer to Help | Working with Profiles and Contacts | Maintaining Contact Details | Adding Contacts for a complete list of the fields that are included in the Contact Record and Tabs.

Exercise - Adding / Maintaining Contacts

Exercise - Adding/Maintaining Contacts

• Add Contacts
 • Edit Contacts

CRM-430

Complete the following hands-on exercise to test your knowledge on how to use the locate, add, edit and report on contacts.

Hands-on Scenario

Your customer Margaret Smith informs you by email that she has been promoted to General Manager of the Medical Supply Company. She asks you to direct further correspondence to her replacement Andrew Billings. Andrew will take over as the Product Manager. Andrew is working from his home office in Denver, CO. He can be contacted by email (abillings@medco.com), or phone (303-420-5678). In addition he can receive mail either in his home office or at corporate. Andrew is reporting directly to Margaret.

- 1 Please update Margaret Smith's record as to her new position - also add any information that might be missing from her Contact Record such as employee status (current/primary or former), contact times.
- 2 Add Andrew as a Contact - (make up an address for Andrew's home office in Denver, 80202).

Bonus Question Margaret Smith serves on a non-profit board with Ann Blake who works for the Electronics Mart. Document this relationship.

Contacts - Knowledge Check

Contacts – Knowledge Check



- Complete the Knowledge Check by filling in the blanks with the correct answer or indicating if the statement is "True" or "False".
- If you are attending Instructor-Led Training your instructor will discuss your answers.
- Self-Paced Training participants follow the instructions to log problems or get help.
- The answers to the Knowledge Check are in the back of the Training Guide.



CRM-440

- 1 A Contact is a person that can be associated with more than one Profile (True or False?).
- 2 An Internal Contact is associated with and maintained from the _____ Tab on the _____ Record.
- 3 An easy way to associate a Contact with another Profile is to use the Copy Details Option (True or False?).
- 4 List four Contact Data Field with a field descriptions, and the Contact Tab where they are displayed:
 Example: Field: Source, Description: Where did we hear about this Contact?, Tab: Further Details

- 5 Last Name, First Name, Contact Name, Position, and Mail Groups are all Search Fields on the Search for Profile or Contact Screen (True or False?).

Contacts - Key Points

Contacts – Key Points

- Review the Chapter Key Points



- Questions?



CRM-450

- A Contact is a person who must be associated with a Profile.
- A Contact can be associated with more than one Profile. An example is a Contact who works for one Profile and is a consultant to another.
- There are two search screens:
 - Search a Profile or Contact
 - Contact Persons Screen
- Always search before adding data, this includes Contact Records as well as Profile Records. This is important in tracking earlier relationships with a Contact.

Chapter 5

Activity Management

Activity Management - Overview

Activity Management - Overview

- Associated with Profiles and Contacts
- Communications: Future, Planned, History

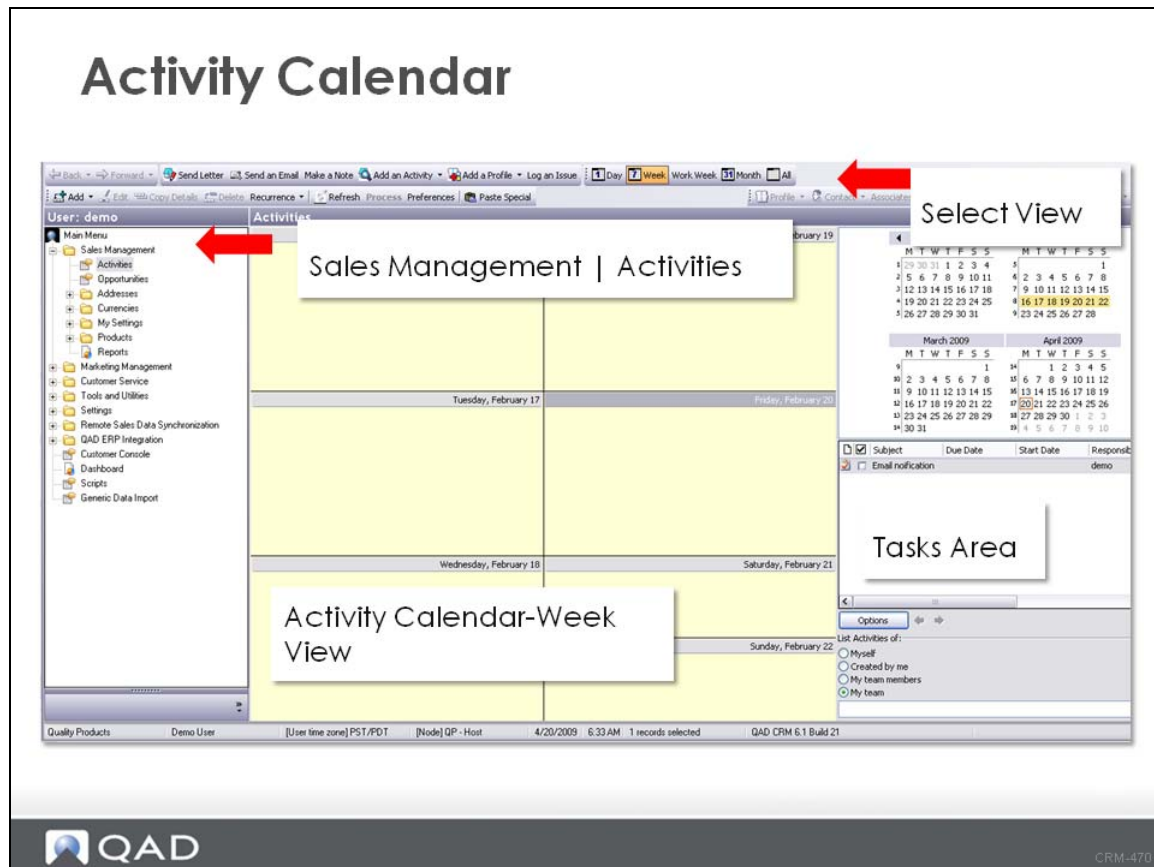
In this chapter you learn how to communicate with your Profiles, Contacts and Internal Contacts using Exercise – Managing Opportunities Activities, Tasks, Emails, and Letters in QAD CRM.

Learning Objectives

By the end of this chapter, you will be able to do the following

- Describe Activities and Tasks.
- List the Activity Types.
- Add and process an Activity.
- Add a Task.
- Describe a Contact Note.
- Explain how to send an Email.
- Explain how to send a Letter.

Activity Calendar



The QAD Customer Relationship Management (QAD CRM) Application describes Activities as business related activities and Tasks as “to-do’s” that you can assign to yourself or others. You can schedule both for a particular date, but Activities such as Appointment and Telephone also have due time. Tasks have a due date but not a time.

Accessing Activities and Tasks

The Activities Module ensures that your sales and marketing teams always have the relevant customer, market, and sales information at their fingertips. This module is available in both Sales Management and Marketing Management: Main Menu | Sales Management | Activities or Main Menu | Marketing Management | Activities.

When you choose Activities from the application menu, the Activities calendar displays in the left portion of the workspace. The calendar display is defined by the view you select - Day, Week, Work Week, Month or All.

The Task Area is not displayed in the All View. The All View displays all activity records, irrespective of the day, week, and month in a list that can be filtered as there can be a great many records.

To further clarify your results, the All View also utilizes a strike through format for those activities that have already been processed and activities are color coded according to the default settings. For instance, red color indicates overdue activities and blue color is for high-priority activities.

Note The All View does not display the Task Area or the calendar.

You can integrate the QAD CRM Calendar with Micro Soft Outlook. Integration with Lotus Notes is scheduled for a future release.

Adding Activities

There are many ways to add an activity including:

- Right-click in the Activity Tab Window from the Profile, Contact, or Opportunity Records.
- Right-click in the Calendar from the Activity Module.
- Use the Add an Activity from the QAD CRM Toolbar.

The Activity Type Dropdown will display a list of activity types: Telephone, Appointment, Letter, Email or Script.

The Telephone and Appointment types appear in all of the Calendar Views and the Activity Tab on the Profile, Contact and Opportunity Records. The Letter and Email types appear on the All View in the Calendar and the Activity Tab for the Profile, Contact and Opportunity Records. Scripts have their own tab on the Profile and Contacts Records.

Note We will discuss Scripts in a later chapter.

Steps - Adding an Appointment

Steps – Adding an Appointment

The screenshot shows the QAD CRM-480 interface. On the left is a 'Main Menu' tree with categories like Sales Management, Activities, Opportunities, Addresses, etc. The main area displays the 'All Profiles' table with columns: Profile Name, Address[1], Town/City, Post Code, Tel No[1], and Fax No. The table lists several profiles, including 'Medical Supply Company'. Below the table is a 'Details' section with tabs for Further Details, Addresses, Activities, Opportunities, Relationships, Internal Contacts, Remarks, and Campaigns. The 'Activities' tab is active, showing a table with columns: Start Date, Subject, Activity Type, and Profile. A right-click context menu is open over the 'Activities' tab, with options like Add, Edit, Copy Details, Delete, Refresh, Show Column, Record Count, Report, Process, Search, Profile, Contact, Associates, Auto Preview, and View Reading Pane. The 'Appointment' option is highlighted by a red arrow.

User: demo

Main Menu

- Sales Management
 - Activities
 - Opportunities
 - Addresses
 - Search a Profile or Contact
 - All Profiles
 - Contact Persons
 - Profile Relationships
 - Currencies
 - My Settings
 - Products
 - Reports
- Marketing Management
 - Customer Service
 - Tools and Utilities
 - Settings
 - Remote Sales Data Synchronization
 - QAD ERP Integration
 - Customer Console
 - Dashboard
 - Scripts
 - Generic Data Import

All Profiles

Profile Name	Address[1]	Town/City	Post Code	Tel No[1]	Fax No
MacDonnell Buildings	Endeavour Street	Melbourne	3055	881-203-0766	881-203-3
Mississauga Reliable	Square 1 Shopping Center	Mississauga	N01 H2E	416-632-0293	
MH Truck	6936 N. Fathom	Rock Island	61201		
MISCELLANEOUS CUSTOMER (USED BY ACCOUNTS RECEIV					
Medical Supply Company	1001 Elm Street	Orlando	32821	409-239-4444	
Medical Devices, Inc.	2515 Birch Street	Key Largo	33037	305-453-3333	
Machinery Tooling & Supply	321 Main	Schaumburg	60173	(555) 845-1234 x 11	

Details | Further Details | Addresses | **Activities** | Opportunities | Relationships | Internal Contacts | Remarks | Campaigns

Drag a column header here to group by that column.

Start Date | **Subject** | **Activity Type** | **Profile**

Planned Activities | History

Right-click context menu:

- Add
- Edit
- Copy Details
- Delete
- Refresh
- Show Column
- Record Count
- Report
- Process
- Search
- Profile
- Contact
- Associates
- Auto Preview
- View Reading Pane

Appointment (highlighted)

QAD CRM-480

Let's add an Appointment together and discuss the fields and processing.

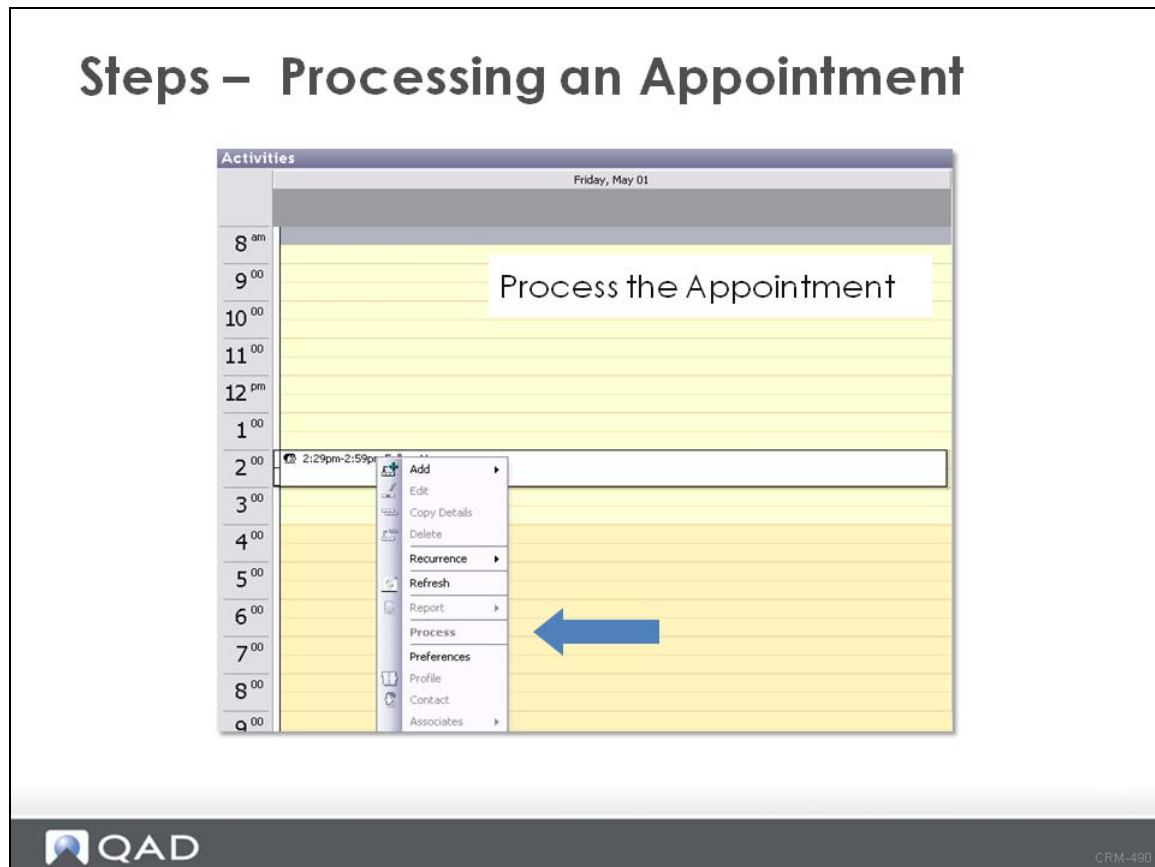
Scenario

Your customer Margaret Smith at Medical Supply Company would like a demonstration of the new product line. She is free next Tuesday from 1:00 p.m. until 3:00 p.m. and would like you to come to her offices. Create an appointment and invite Barry Whitehead a CSR with your organization.

- 1 Navigate to the Medical Supply Company Profile and select the Activity Tab.
- 2 Right-click in the Activities Tab and select Add |Appointment.
- 3 The Appointment Screen opens to the Appointment Detail Tab. The Profile, Contact, and Responsible fields are filled. The Contact field contains the default contact - Margaret Smith. If you wanted another contact you would have to choose Select Contact.
- 4 Although the Location Field has a drop-down list associated with it, you can also type in a value. Type in Medical Supply Company.
- 5 Contact Time Zone, Organizer and Priority are filled in.
- 6 Add the Categories of Key Customer and Strategies for reporting purposes.

- 7** You could mark this is a Private Meeting by selecting the Private Checkbox but for this meeting that would not be appropriate.
- 8** Click the Further Details Tab and add the User Barry Whitehead.
- 9** Save the appointment. Do NOT notify the attendees now as we are not integrated to a mail server in this environment. When appointment notification is sent out to internal users it is reflected in their activity calendar.
- 10** View the new appointment in the Activities Calendar, Profile, and Contact. Select the All Activities View (if the appointment does not appear, select File | Refresh and try again).
- 11** Right-click the Appointment in the All View, choose edit and change the priority to A-High. Save.
- 12** Notice that the Appointment changes color to blue based on its priority.

Steps - Processing an Appointment



After creating a telephone or appointment activity you are required to process it either on or before the scheduled date. When you process an activity you document what happened and next steps. You can even create a follow-up activity. When you process activities, you create transaction history records.

Scenario

You just returned from the Demonstration with Margaret and her team. They were quite impressed with the new products and would like you to return next week for another presentation this time to Margaret's manager. Let's set the new presentation up and record our results.

- 1 Navigate to the Appointment and double-Click to open.
- 2 Update the Contact Notes, Outcome and select Follow-up Activity to create another demo.
- 3 Save the new appointment.
- 4 Open the appointment and check the appointment history.

Note You can also Process the appointment by right-clicking the appointment, and selecting Process from the menu. Opening the appointment or right-clicking on the appointment will take you to the Process Activity Screen.

Exercise - Adding / Processing an Appointment

Exercise - Adding/Processing an Appointment

The screenshot shows the QAD CRM interface. At the top, there's a menu bar with options like 'Send an Email', 'Make a Note', 'Add an Activity', 'Add a Profile', and 'Log an Issue'. Below this is a toolbar with icons for 'Show Column', 'Sort', 'Filter', and 'No Filter'. The main window is divided into several panes. On the left, there's a list of profiles under the heading 'All Profiles'. The 'Electronics Mart' profile is selected. The details pane on the right shows contact information for 'Ann Blake' and a list of activities. A red arrow points to the 'Appointment' option in the 'Add an Activity' dropdown menu. A callout box on the right lists the steps: 'Add an Appointment', 'Process', and 'Create Follow-up'.

QAD CRM-500

Complete the following hands-on exercise to test your knowledge on how to add and process an Appointment.

Hands-on Scenario

Every month you meet with your top customers. Set-up a lunch appointment with Ann Blake of Electronics Mart. During lunch Ann mentions that she wants to talk with the Product Manager and ask him some questions about the future of the products - create a follow-up.

- 1 Create a lunch appointment.
- 2 Process the appointment.
- 3 Create a follow-up activity - a conference call with the Product Manager. Please note that you need to set-up a telephone activity.

Bonus Question How to you view all of your team's open activities.

Task Management

The screenshot displays the QAD Task Management interface. At the top, a table lists tasks with columns for Subject, Due Date, Start Date, and Response. Below the table, a left sidebar contains filters for task views: All Tasks, Today's Tasks, Active Tasks for Selected Days, Tasks for Next Seven Days, Overdue Tasks, Tasks Completed on Selected Days, My Tasks, Tasks Created by Me, and Include Tasks With No Due Dates. A context menu is open over the task list, offering options: Add, Edit, Copy Details, Delete, Refresh, Show Column, Record Count, Search, Auto Preview, Task View, and Associates. A 'Task View' dialog box is also present, listing 'All My Tasks' and 'With or without Due Dates'.

Subject	Due Date	Start Date	Response
☒ Check on new product structure	04/22/09		demo
☒ Review customer plans with sales p...	04/01/09		demo
☒ Hotel book for CP visit			demo
☒ Search Customer Problem		17/09	demo

Task View:

- All My Tasks
- With or without Due Dates

QAD CRM-510

Tasks are “to-do’s” that you can assign to yourself or to others in your team through the Activities Module. Tasks assigned to you display in the Task Area on the Activities Calendar. Tasks assigned to others display on their Activities Calendar. You can view all Tasks created by you by selecting the correct Task View.

Tasks records have different views. Right-click the Task Area to select the required view from the options.

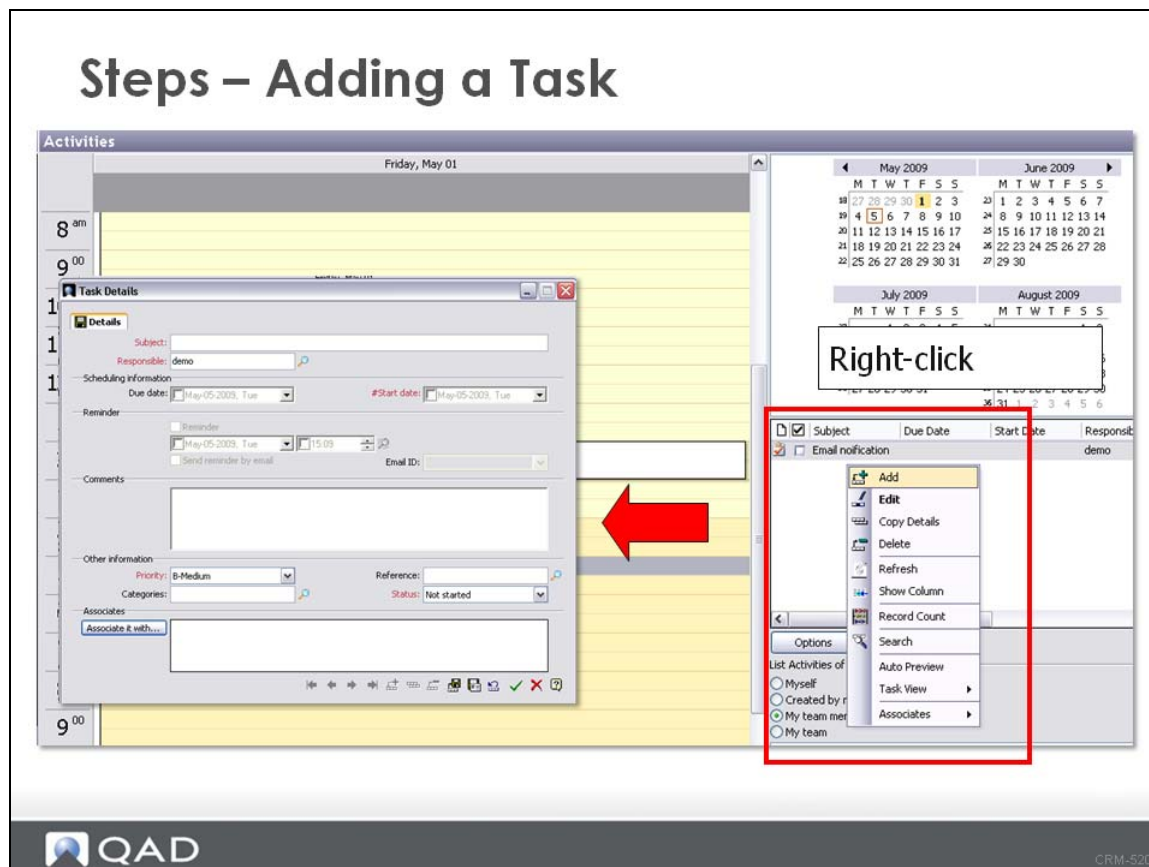
You can select the number of Tasks you want to display by selecting the Options button available just below the Tasks area in the workspace.

You close a Task by selecting the Check Mark next to it. Closed Tasks are displayed with strike-through text.

You can associate a Task with a Profile, Contact, Opportunity, Campaign, Installed Base or Issue. When you associate a Task to a record, you are allowed to open the associated record from the Task. The Task does not appear on the record.

Note Task Email Reminders functionality is disabled in the training environment but can be used if your production environment is integrated with Micro Soft Outlook (

Steps - Adding a Task



Tasks are added by Right-clicking in the Task Area of the Activity Calendar. Let's add a Task together.

Scenario

In reviewing the new product features you believe some of your customers can benefit from the new release. There are benefits in giving one presentation vs. many. Create a Task to review your accounts and associate the Task with those Customers that should attend the presentation.

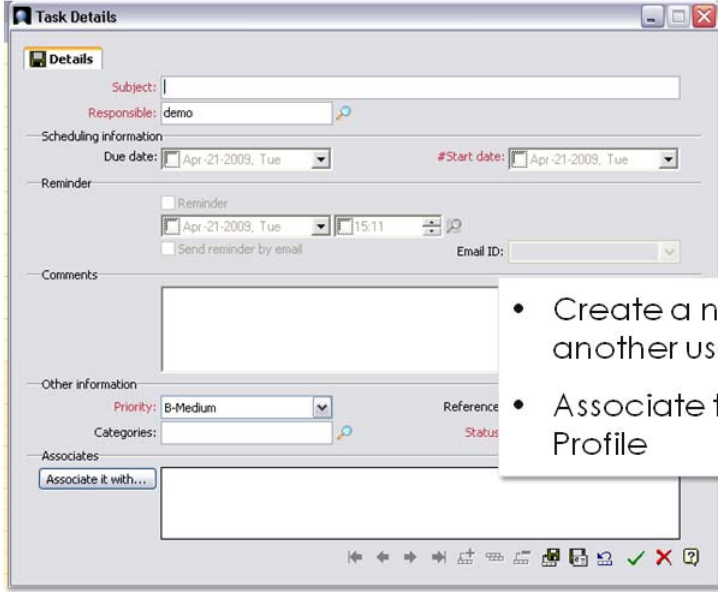
- 1 Main Menu | Sales Management | Activities.
- 2 Choose the Calendar Day View from the Application Toolbar.
- 3 The Task Area displays in the lower right-hand corner. Right-click and choose Add from the menu.
- 4 The Task Detail Screen displays. There are five (5) required fields: Subject, Responsible, Start Date, Priority, and Status. Responsible, Start Date, Priority and Status are pre-populated with default values. Enter the following:
 - Subject = *New Feature Release Review*
 - Responsible = *Default (Your User ID)* You can assign to another User in this field
 - Due Date = *Choose a Future Date*
 - Start Date = *Default Today's Date (click the check mark)*

- Comments = *New Feature - Customer List*
- Priority = *Change to A-High*
- Status = *Change to Open*
- Associate it With = *Acme Steel, Auto Manufacturing*

5 Save the Task. The Task displays in the color blue as it has a Priority of A-High.

Exercise - Adding a Task

Exercise – Adding a Task



- Create a new task for another user
- Associate the task with a Profile


CRM-530

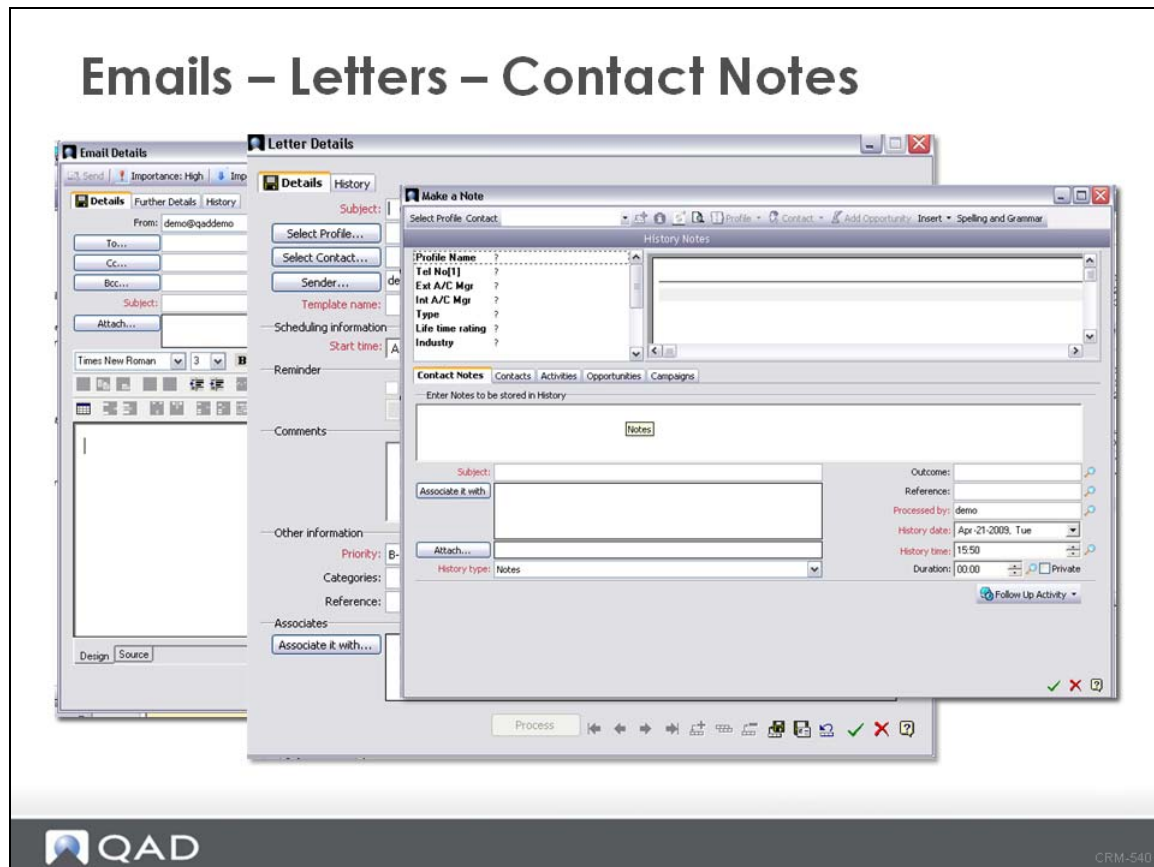
Hands-on Scenario

Create a Task for Barry Whitehead (CSR) to review the customer service records for Grace Resellers. You are particularly interested in how many calls they've made. You'd like this done ASAP.

- 1 Create the Task.
- 2 Assign to Barry.
- 3 Associate with Grace Resellers.

Bonus Question In the training environment you are not able to send emails, however if you were in a production environment could you send an email reminder to Barry?

Emails - Letters - Contact Notes



QAD CRM support many different methods of communication. We have learned how to add activities to our calendars and create tasks for ourselves and other team members. We can also send emails and letters using templates or attach a note to a Profile/Contact to add information that might not be associated with a communication event.

Email Communication

In order to send emails from QAD CRM, you must be integrated with the Microsoft Exchange Server. Assuming integration is set-up, you can compose an email as an Activity or by selecting the Send an Email Button in the Toolbar.

When you send an email through the Activities module, it automatically gets included in the Profile Transaction History. When you send an email using the Send an Email button you must request that the email is saved in the selected Profile transaction history.

Send a Letter

Similar to email communications you can generate a letter as an Activity or by using the Send a Letter button in the toolbar. When you create a letter in QAD CRM you create a Microsoft Word document (.doc) based on a template. The template includes the required format and fields that are merged with the information from the selected CRM record.

Letters created through the Send a Letter button are generated immediately. Letters created as Activities are only generated only when they are processed based on their scheduled dates.

Make a Note

The Make a Note button from the tool bar gives you the ability to add information to the Transaction History for a Profile/Contact. Once you make a note and save it, you can view it from the Profiles module in Activities/History.

Notes can include comments, imported files or attachments.

Note Refer to QAD On-Line Help or the QAD Customer Relationship User Guide for more information on Notes.

Activity Management - Knowledge Check

Activity Management – Knowledge Check



- Complete the Knowledge Check by filling in the blanks with the correct answer or indicating if the statement is "True" or "False".
- If you are attending Instructor-Led Training your instructor will discuss your answers.
- Self-Paced Training participants follow the instructions to log problems or get help.
- The answers to the Knowledge Check are in the back of the Training Guide.



CRM-550

- 1 How do you add a Task?
 - d Right-click in the Task Area located in the CRM Calendar.
 - e Select a Profile and right-click the Profile.
 - f All of the above.
- 2 List two types of Activities that appear on your Calendar.

- 3 When you Process an Activity (telephone or appointment) you indicate that the activity is closed or completed. (True or False?).
- 4 The value in the _____ Field for both Tasks and Activities can change the display color.
- 5 When you associate an Activity or Task to a Profile, Contact or Opportunity, the Activity/Task appear in the associated record. (True or False?)

Activity Management - Key Points

Activity Management – Key Points

- Review the Chapter Key Points



- Questions?



CRM-560

- The following Activity Types are available in QAD CRM:
 - Telephone
 - Appointment
 - Letter
 - Email
 - Script
- Tasks are “to-do’s” that assign to yourself or to others.
- Some Activities appear on the internal QAD CRM Calendar and can be integrated with Micro Soft Outlook
- You can associate most activities and tasks to records within QAD CRM for easy navigation and follow-up.
- Activities become part of the Profile/Contact Transaction History.
- You can add Notes to the Transaction History without adding an Activity.

Chapter 6

Opportunities

Opportunities - Overview

Opportunities - Overview

User: demo

Stage	Date	Currency	Opportunity ID	Probability	Project	Reference	Sales Person	Source	Stage	Positioning	Participate in R
01-27-2009	01-27-2009	USD	QP-710	95%	100%	5033739	demo		ORDER		Yes
01-27-2009	01-27-2009	USD	QP-711	95%	100%	5033742	demo		ORDER		Yes
01-28-2009	01-28-2009	USD	QP-715	100%	100%	5033748	demo		Invoiced		Yes
01-28-2009	01-28-2009	USD	QP-716	95%	100%	5033751	demo		ORDER		Yes
02-02-2009	02-02-2009	USD	QP-721	100%	100%	5033759	demo		Invoiced		Yes
02-02-2009	02-02-2009	USD	QP-718	95%	100%	cs000079	demo		ORDER		Yes
02-02-2009	02-02-2009	USD	QP-719	95%	100%	cs000080	demo		ORDER		Yes
02-02-2009	02-02-2009	USD	QP-720	95%	100%	5033758	demo		ORDER		Yes
02-03-2009	02-03-2009		QP-734	100%	100%	5033783	demo		Invoiced		Yes

Details Further Details Activities Enquiry Quote Order Other Stages Role Players Analysis Codes User Defined Fields Attachment

Select Profile: General Merchandising #Stage: ORDER

Select Contact: QP8 Positioning: demo

Auto Allocate: demo Next stage date: Apr 13 2009 Man

Short Description: General Merchandising/MFG/PP Probability: 95%

Type: MI

Source: cs

References: ☒

Forecast Date:

Due date:

Opportunity ID:

- Opportunities must be associated with a Profile, Contact, and Sales Representative
- Opportunity Stage is a **required** field
- Sales Management | Opportunities

Quality Products Demo User [User time zone] PST/PDT [Node] QP - Host 4/13/2009 4:34 PM 1 records selected QAD CRM 6.1 Build 21

QAD CRM-570

In this chapter you learn how to manage your business opportunities using QAD CRM. Opportunities begin as business leads generated by your sales organization and marketing department.

Learning Objectives

By the end of this chapter, you will be able to do the following

- Describe the Opportunity Record.
- List the data that is contained in an Opportunity Record.
- Search for an Opportunity using the Opportunity Screen, Profile Opportunity Tab or Customer Console.
- Discuss the business opportunity management process stages.
- Add an Opportunity.
- Maintain an Opportunity.

Opportunities = Business Deals

Opportunities = Business Deals



CRM-530

- An Opportunity is a business “deal” that must be managed effectively to turn the prospective “deal” or lead into an actual sale or order.
- Opportunities must be associated with a Profile, Contact and Sales Representative.
- Typically Opportunities are managed through a staged business process which can include: identifying, follow up, sending quotes/negotiating deals, finalizing orders, and offering post-sales service.
- QAD CRM supports the staged business process through the values defined in the **required** Stage Field: Enquiry, Quote, and Order. QAD CRM also supports user-defined stages. In our training system we’ve added the following stages: Installed base, Invoice, Lost and Dead.

What information is contained in an Opportunity?

- Opportunity Records contain information related to the business deal.
- Information is displayed on-line in the following tabs: Details, Further Details, Activities, Enquiry, Quote, Order, Other Stages, Role Players, Defined Fields, Attachments, and Scripts.

Searching for an Opportunity

Searching for an Opportunity

The screenshot shows the QAD CRM Opportunities screen. The main table lists opportunities with columns: Stage, Date, Due date, Create Date, Currency, Opportunity ID, Probability, and Project. An 'Opportunity Filter' dialog box is open on the right, showing a list of filters. A red arrow points from the 'Opportunity ID' column header in the main table to the filter dialog. A white callout box contains the following list:

- Create a Filter
- Sort Columns
- Locate from Profile
- Customer Console

The QAD logo is visible in the bottom left corner, and the text 'CRM-590' is in the bottom right corner.

QAD CRM Opportunities are accessed from the Opportunity Screen, the Opportunity Tab in the associated Profile Record, and the Customer Console if CRM/ERP Integration is active and the Opportunity Stage is set to Quote or Order. Opportunities that are in the Enquiry Stage can not be viewed in the Customer Console.

Opportunity Screen - Sales Management | Opportunities

All the Opportunities for your organization are listed in the Opportunity Screen in the Opportunity Browser Window. You can create a filter to locate a sub-set of Opportunities. The filter can be stored for future use.

You can sort the Opportunities in the Opportunity Browser Window by clicking on the column heading. You can also change the order or the fields displayed in the Opportunity Browser Window (as you can with any browser window) by using the Show Column feature.

Profile Record - Opportunity Tab

Opportunities **must** be associated with a Profile, Contact and Sales Representative. The Opportunity Tab for each Profile has a list of all Opportunities associated with that Profile. You can sort and report on the Opportunities from the Opportunity Tab.

Customer Console

The Customer Console provides an all-around view of a customer record, as the screen displays a combination of data from both QAD ERP and QAD CRM.

The Customer Console can only be used if QAD ERP/CRM Integration is active. In addition, Opportunities are displayed in the Customer Console depending on the Opportunity Stage field (Quote Stage or beyond).

Steps - Using Opportunity Filters

Steps – Using Opportunity Filters

The screenshot shows the QAD CRM-600 interface. The 'Opportunities' screen is active, displaying a list of opportunities with columns for Stage, Date, Currency, Opportunity ID, Probability, and Reference. The 'Filter' dropdown menu is open, showing various filter options. A red arrow points to the 'Filter' button in the toolbar. A callout box lists three steps: 1. Report on Product Line 1000, 2. Enquiry Stage, and 3. Export to Excel.

Let's walk thru the Opportunity Screen, create, and use filters so you can review your organization's Opportunities in an effective manner.

Scenario

Management has asked you to report on Opportunities that are in the Enquiry Stage for Product Line 1000. You want to create an Excel Spreadsheet with all the information about these Opportunities. Let's get started!

- 1 Navigate to the Opportunities Screen and Click the Filter Dropdown in the Toolbar.
- 2 Review the existing filters displayed in the drop-down list. None of the filters appear to give you the results you need.
- 3 You need to add a new filter. Click the Filter Button next to the Filter-Drop Down. The Opportunity Filter Window displays. Select the Add Icon.
- 4 .A blank Opportunity Filter Dialogue Box displays. Enter the following:
 - Detail Tab: Filter Name = *Enquiry Opportunities Product Line 1000*
 - Further Details Tab: Stage = *ENQUIRY* (use lookup icon)
 - Products Tab: Enter CVS list of Product Lines = *1000* (use lookup icon, select first line)
- 5 Save the filter.

- 6 Right-click in the Opportunity Filter Window. Choose Export from the drop-down list and the Export Wizard displays.
- 7 Select Applications and click the green arrow at the bottom of the Export Wizard.
- 8 Choose Microsoft Excel from the list of displayed applications and click the green check mark to save.
- 9 The Opportunity Filter Results are exported to Microsoft Excel where you can save the results and/or manipulate them.

Steps - Adding Opportunities for an Existing Customer

Steps – Adding Opportunities for an Existing Customer

The screenshot shows the 'All Profiles' window in QAD CRM. The 'Opportunities' tab is selected. A red arrow points to the 'Colossal Conglomerates LTD' entry in the list. A context menu is open over the 'Add' button, showing options: Add, Edit, Copy Details, Delete, Refresh, Show Column, Sort, Record Count, Report View, Export, and Report. A callout box lists: Review Opportunity Details, Add Opportunity, and Follow-up Activity.

Profile Name	Address[1]	Town/City	Post Code	Tel No[1]	Fax No	Email Id	Contact Name	First
Consigned Inventory Custome No Intransit Locations		Chicago	60195				Bertha Blaise	Berth
Consigned Inventory Custome Intransit Location		Albany	990099					
Customer	1212 Customer St	New York	21111					
Colossal Conglomerates LTD	Suite 1000 Colossal Building	Evanston	090876	1-800-333-9000 x 666				
CENTURY HALLMARK	Attention: Accounts Payable	Los Angeles	89000	213-920-0394	213-920-0399			
Custom Homes and Buildings	2670 Tenth Street	Phoenix	85028	602-265-5656	602-898-5560			
Carless Company	Vittorio Square	Rome	00143	39-06-99775	39-02-72331			
Canadian Supply Corp.	Central Distribution Centre	Willowdale	M7E 9F2	416-920-4833	416-920-4888			
Centre D'Affaires	2204 rue de Rivoli	Montreal	X9W 7E2	714-923-0239				

Profile Name	Stage Date	Due date	Create Date	Project Probability	Project Probability Reference	Order ID	Product Line	Product ID	Product Description	List Price
Colossal Conglomerates LTD	02-26-2009	02-26-2009	02-26-2009	95%	100% SQ1059	QP-969	1000	02-0006	Pencil	3.00
Colossal Conglomerates LTD	03-19-2009	03-19-2009	03-19-2009	95%	100% SQ33832	QP-970	1000	02-0006	Pencil	3.00
Colossal Conglomerates LTD	02-26-2009	02-17-2009	02-17-2009	95%	100% SQ33823					3.00
Colossal Conglomerates LTD	02-26-2009	02-17-2009	02-17-2009							3.00
Colossal Conglomerates LTD	02-19-2009	02-19-2009	02-19-2009							3.00
Colossal Conglomerates LTD	02-20-2009	02-20-2009	02-20-2009							3.00
Colossal Conglomerates LTD	03-04-2009	03-04-2009	03-04-2009							1.00
Colossal Conglomerates LTD	03-04-2009	03-04-2009	03-04-2009							
Colossal Conglomerates LTD	02-25-2009	12-19-2008	12-19-2008							

Managing business opportunities is an integral part of business generation efforts. Every organization has a business and selling process to ensure their success. Many of these processes are designed based on the business sector.

QAD CRM is designed to accommodate and enhance your organization's selling process. You can manage a list of opportunities, specify opportunity details, identify key people involved in the opportunity, maintain quotes and orders, and keep a historical record of all customer activities.

Typically the opportunity management process has the following stages:

- Identifying Opportunities
- Following Up on Opportunities
- Sending Quotes and Negotiating Deals
- Finalizing Orders
- Offering Post-Sales Service.

The Opportunity Stage Field is a required field. The value of this field indicates where the opportunity is in the management process. The ENQUIRY, QUOTE, and ORDER Stage Values are required when using QAD CRM. Your organization can also add other stage values to help you manage your Opportunities.

Identifying and Adding Opportunities - Existing Customer

Opportunities are identified for new or existing customers. Depending on your organization's sales process when an Opportunity for a new customer is identified it can be referred to as a lead or a prospect.

It is most important that you enter any identified Opportunity into QAD CRM so you can manage and record your actions and progress in turning the Opportunity into an order.

In the below Scenario we identify and add an Opportunity for an existing customer.

Scenario

You receive a call from Jim Barber at Auto Manufacturing. Jim just read about the new line of automotive products and would like to learn more about the new NOMAD (TM) Cooling System. You promise to send him some literature and to call him after he has had a chance to review the product literature in more detail. Make sure you create a follow-up telephone activity.

- 1 Navigate to the Auto Manufacturing Profile and select the Opportunity Tab.
- 2 Right-click in the Opportunity Window and choose Add from the menu.

The Opportunity Details Screen displays. A number of fields are either pre-filled or defaulted Let's review and update the fields in the Opportunity Record starting with the Details Tab.

Fields flagged with an "*" are pre-filled based on information in the Auto Manufacturing Profile or the User ID of the individual adding the Opportunity.

- *Profile = *Auto Manufacturing*
- *Contact = *Jim Barber*
- *Auto Allocate = *Defaults to Your User ID*

You can change this field to another Sales Representative by using the look-up or the auto-allocate button which selects an account manager based on territory allocation.

- Short Description = *NOMAD Cooling*

The Short Description field can be positioned using the Show Columns feature so you can easily identify what products are being considered from the Opportunity Browse Screen.

- Type = *Automobile Industry*
- Source = *Customer Inquiry*

Enter the Type and Source Fields with the help of the look-ups provided or simply type a value in. These fields are primarily for analysis and reporting.

- Reference = *leave blank*

The Reference Field can be populated by using the look-up, typing in a value, or system generated with the ERP Quote Number when an Opportunity is sent to QAD ERP and the Reference Field is empty. Please note that Opportunities are sent to QAD ERP when they Opportunity Stage has progressed beyond the ENQUIRY Stage.

- Participate in Forecast = *Selected by Default*

Unselect this field if you do not want the Opportunity to be considered in the Sales Forecast. There can be times when you want to enter the Opportunity in QAD CRM for easy tracking but do not want to report on the Opportunity until you have more information.

- Forecast Date = *Today's Date*
- Due Date = *Today's Date + 2 months*
- Opportunity ID = *System Generated*

The Opportunity ID is generated when the Opportunity is saved. The Opportunity Id is used within QAD CRM and is not integrated with QAD ERP.

- Stage = *ENQUIRY*

The Opportunity Stage Field determines where the Opportunity is in the Opportunity Management Process. Typically an Opportunity follows the path of ENQUIRY, QUOTE, and ORDER, however, there is no set order. An Opportunity can be entered as an Order. As previously mentioned, QAD CRM allows you to add custom Opportunity Stages that match your business process.

- Positioning = *Literature Sent*
- Next Stage Date = *One week from today*

This is an approximate date when the opportunity is likely to progress to the next stage.

- Probability = *70%*

A sales representative assigns the probability based on the likelihood of translating an Opportunity into an actual sale. The value in this field acts as a weight on the ENQUIRY and QUOTE Stages. An accurate Probability ensures a more realistic Forecast. An example is an Opportunity valued at \$10,000 with 80% probability has a forecast value of \$8,000.

- Project Probability = *70%*

The value in this field acts as a separate weighting factor that works cumulatively with the Probability value and can modify the sales forecast. This field could be used by the Sales Manager when the Sales Manager thinks the Sales Representative is overly optimistic about closing the sale.

- Currency = *Defaulted to US*
- Effective Date = *Today's Date*

This date is used by the system to calculate the exchange rate.

- Calculate Amount = *System*

By selecting System, the next three fields are populated by the system.

- Currency Stage Amount, Stage Amount, Weighted Forecast Amount

Refer to the QAD CRM User Guide definitions of these fields.

- Description = *Opportunity for the new NOMAD Cooling System*

- 3 Save the Opportunity.
- 4 Review the Opportunity from the Detail Tab. Notice the Stage is set at ENQUIRY and the Opportunity ID is system generated
- 5 Select the Activity Tab. Right-click and add the Telephone Follow-up Activity for next week. Save and review the Activity. Note that the Activity is automatically associated with the Opportunity. Review the Activity on your Calendar.

Adding an Opportunity - Recap:

We accomplished the following:

- Added an Opportunity in the ENQUIRY Stage.
- In the Positioning Field indicated that we have sent literature.
- Added a Telephone Task to review the literature in one week.

We need more information to:

- Add any Product information or pricing.
- Update the Role Players for the Opportunity.
- Add SWOT (Strengths, Weaknesses, Opportunity, Threat) Information

Exercise - Adding an Opportunity (Lead)

Exercise – Adding an Opportunity (Lead)

- Add a Profile Wizard
- Add an Opportunity
- Add an Activity

QAD CRM-620

Opportunities are added to existing Profiles or they are added with a new Profile and Contact. When you identify a new Profile/Contact and Opportunity at the same it can be called a lead.

In the following hands-on exercise you identify a new Profile/Contact and add an Opportunity at the same time. Remember an Opportunity must be associated with a Profile and Contact. When adding a new Profile, don't forget to Search First!

Hands-on Scenario

You attend a trade conference where new ideas in your field are presented and you network with competitors, industry experts and potential customers. You are particularly interested in following up with a James Greenwald from Denver Auto Suppliers.

You discussed Product Line 1500 - Automotive Products with James and want to follow-up with him concerning the NOMAD Cooling System and the 1DCL Disk Brakes but James could be interested in the entire product line.

His business card reads:

James Greenwald
Vice President
Denver Auto Suppliers
3200 Colfax Avenue

Denver, CO 80278

Phone: (303) 345-6798

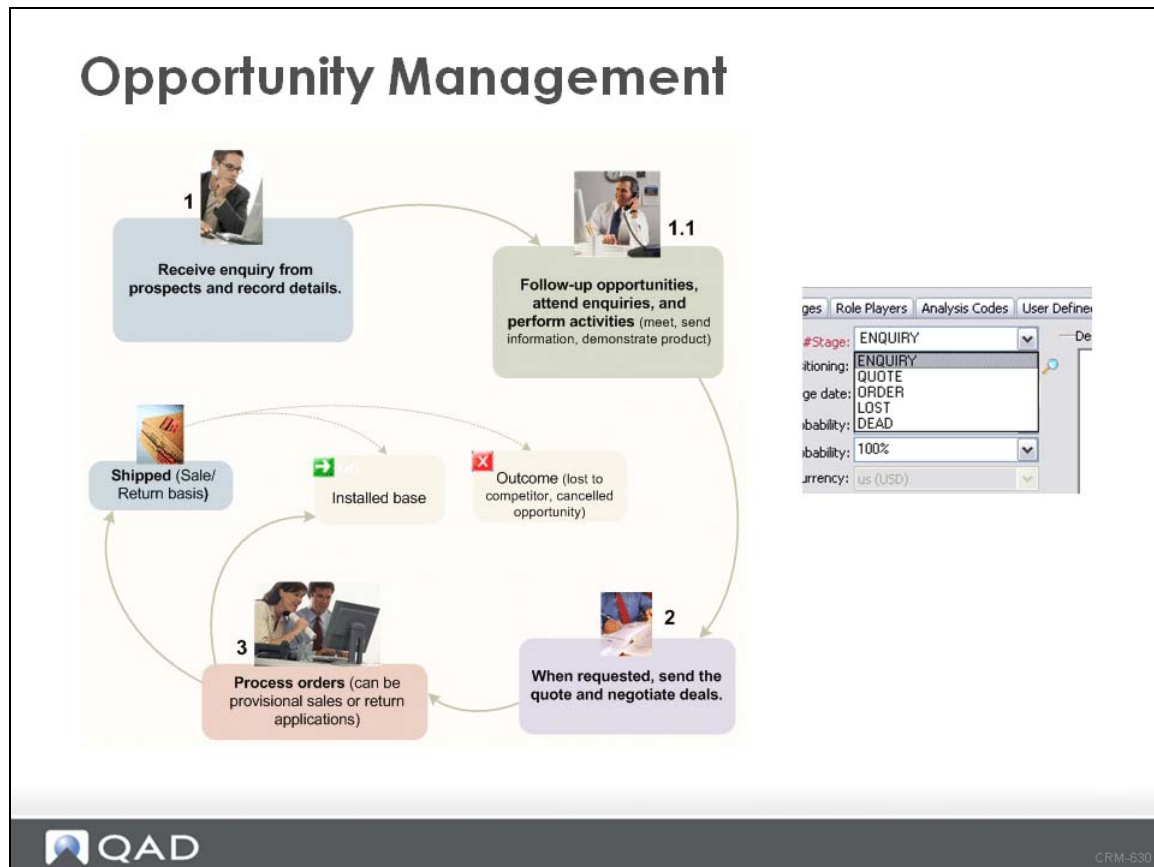
Cell: (720) 880-5620

email: jgreenwald@denverauto.com

- 1 Add James and the prospective Opportunity - the “Lead” into QAD CRM.
- 2 This Opportunity should be in the Enquiry Stage as you do not have enough information to make this a Quote?
- 3 Make sure you add at least one follow-up activities. You can add more than one depending on your business process.

Bonus Question After you save the Opportunity can you see it in QAD ERP? Explain your answer.

Opportunity Management



Now that an Opportunity is identified, is in the Enquiry Stage, and included in the Sales Forecast, it is the Sales Representative's responsibility to move the business forward and turn the Opportunity into a Sales Order. QAD CRM is designed to help facilitate this process.

The scenario below illustrates how a Sales Representative can easily add pertinent information about the Opportunity while meeting with the Customer and Processing an open Telephone Activity. The Sales Representative gains enough information to change the Opportunity Stage from Enquiry to Quote.

Scenario

A week has passed and Jim Barber of Auto Manufacturing has received and hopefully read the information you forwarded concerning the NOMAD Cooling System. It's time to call Jim. In this scenario we access the Telephone Activity that we created and actually record all our work in the system while processing the activity.

Navigate to the Telephone Activity in the All View of your CRM Activity Calendar. Right-click the activity and choose Process from the Menu.

- 1 Locate Jim's phone number from the Activity. You can record your conversation with Jim directly into the Opportunity on QAD CRM by opening the Opportunity from the Associate it with field. Double-Click NOMAD Cooling (this is the Opportunity Short Description).
- 2 As you chat with Jim Click the Further Detail Tab in the open Opportunity and record the Strengths and Weaknesses of this opportunity.
- 3 You ask Jim if he's investigated any of the competition. Click the Role Players Tab and record Jim's answer by entering the Competitor he's researched. The Competitor must be a Profile in QAD CRM. Right-click Competitor and choose Add. Click Select Competitor, the Profile Search Screen will appear. Search for a Profile Type of Competitor and add the Profile if it doesn't exist (Profile Name = Coolant Competitor).
- 4 Jim is explaining which products he is interested in. Select the Enquiry Tab, right-click, and choose add to add these Products to the Enquiry.
- 5 Choose the NOMAD Cooling System Product ID 10-15000-01 and 10-15000-08 for 100 Units each.
- 6 Right-click and choose change the Opportunity Stage.
- 7 The Opportunity Change Screen appears with the Stage set to QUOTE and the Preliminary Radio Button "on". Select the Opportunity Lines (Products) that you want to copy to the QUOTE stage. (Make sure you select BOTH Opportunity Lines.) Save.
- 8 QAD CRM notifies you that the Enquiry Lines are converted to a Quote.
- 9 Select the Quote Tab to see that the two lines are now moved to the QUOTE Stage of the Opportunity.
- 10 Select the Details Tab and check the Reference Field. The Reference Field now contains the ERP Quote Number. When the Opportunity was moved to the QUOTE Stage it was sent from QAD CRM to QAD ERP. QAD CRM was updated with the ERP Quote Number.
You can view the Sales Quote in the ERP Sales Quote Browse Screen by searching with the ERP Quote Number in the Reference Field. You can also view the Sales Quote by using the Customer Console. We review the Customer Console in a later chapter.
- 11 Save the Opportunity Record. You return to the Process Activity Record where you launched the Opportunity. Update the Telephone Activity with the results of the call.
- 12 Using the look-up, populate the Outcome Field as Successful and select the Follow-up Activity in the lower right-hand corner. Create an Appointment 2 weeks out for a demonstration of the NOMAD Products. Save the new Appointment and return to the Process Activity Screen.
- 13 Save the Telephone Activity Record. The Telephone Activity is Processed and Closed. Processed and Closed Activities are displayed with strike-thru text.

Steps - Enquiry to Quote

Steps – Enquiry to Quote

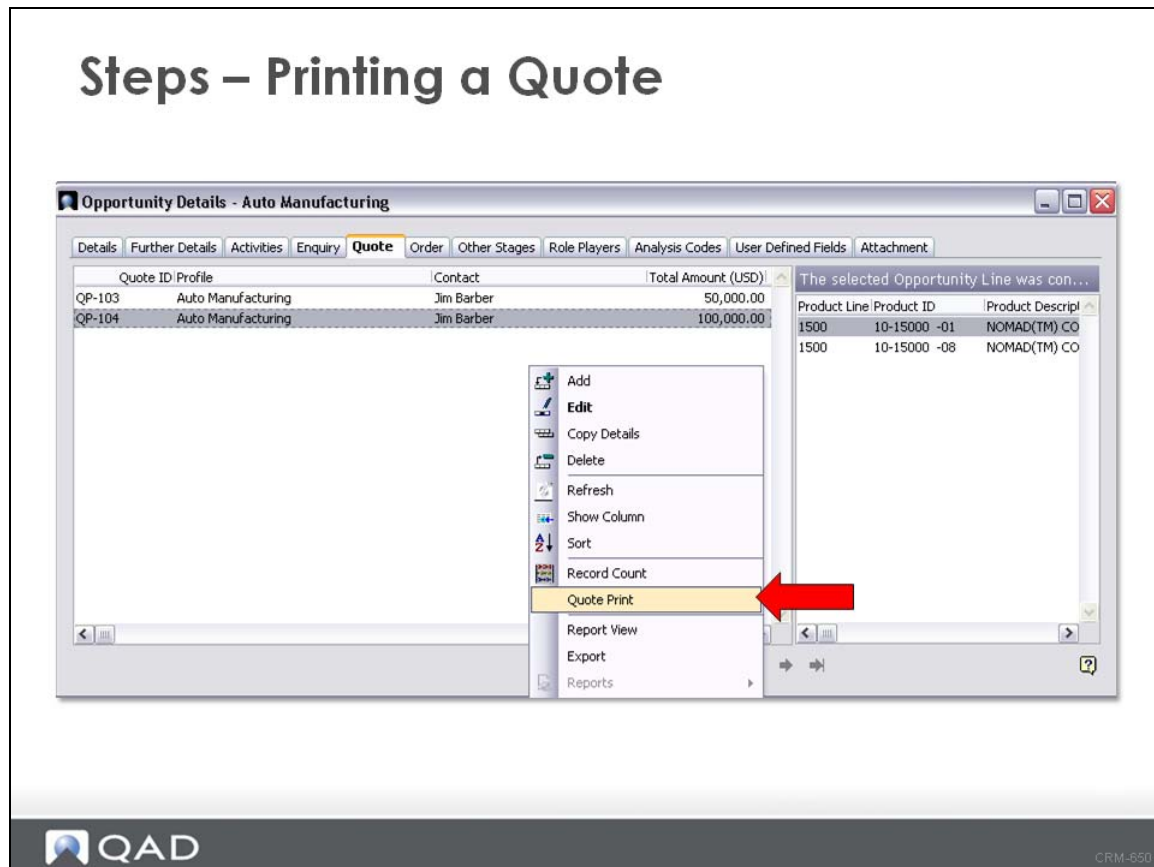
The screenshot shows the QAD CRM 'Opportunities' window. The 'Enquiry' tab is selected in the 'Activities' section. A 'Change to' dialog box is open, showing the 'Change Opportunity Stage' dropdown set to 'QUOTE'. A red arrow points to the 'QUOTE' option in the dropdown. A list of steps is overlaid on the bottom right of the dialog box.

- Process Activity
- Add Products
- Change Stage to Quote
- Create follow-up Activity

We accomplished the following:

- Processed and Closed an Open Telephone Activity.
- Updated the Opportunity with pertinent information from our customer.
- Added Products to the Opportunity and moved the Opportunity from the ENQUIRY Stage to the QUOTE Stage.
- Located the ERP Sales Quote Number in the Reference Field.
- Added a follow-up Activity.

Steps - Printing a Quote



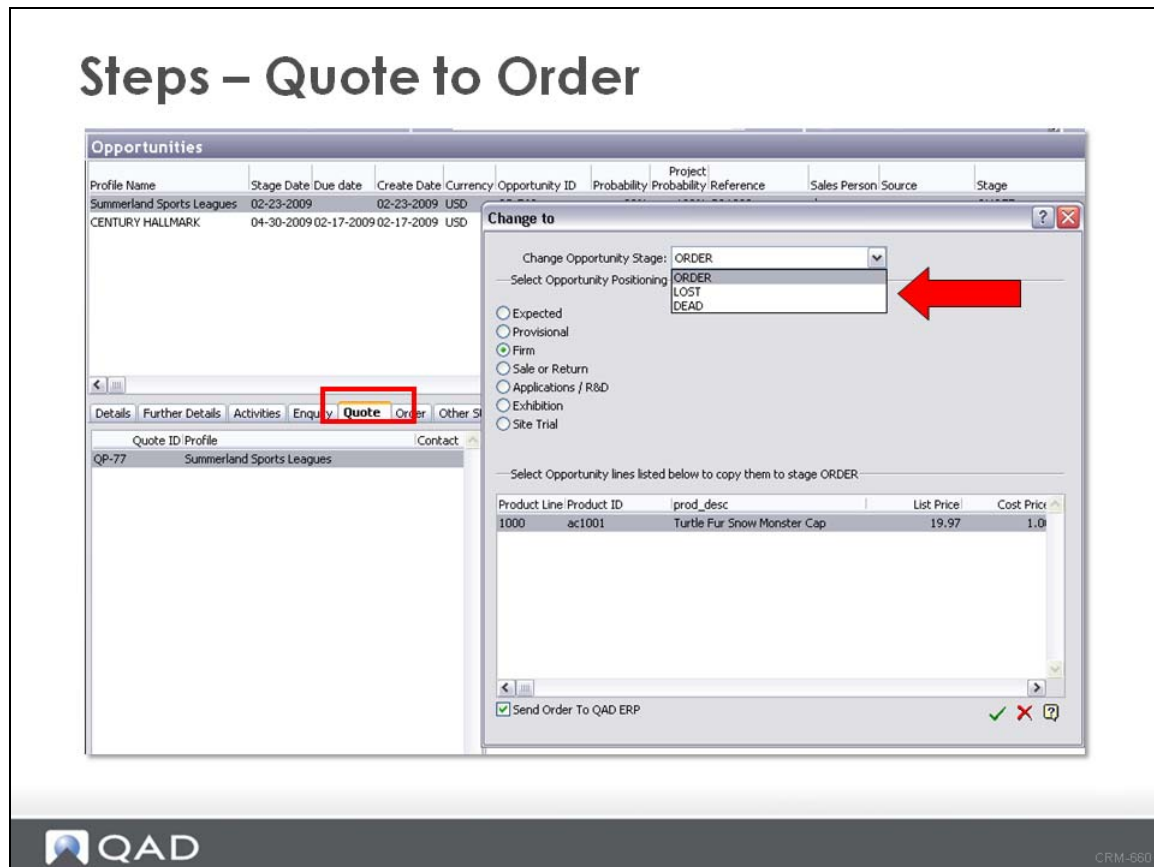
QAD CRM supports the printing of Sales Quotes. Your System Administrator can design a Word Template that you can use to print, save, and send to your customers.

Scenario

Although we verbally discussed pricing with Jim Barber we want to confirm the quote in writing.

- 1 Navigate to the Opportunity for Auto Manufacturing.
- 2 Click the Quote Tab and high-light the NOMAD Cooling Opportunity. Right-click and select Quote Print from the Menu.
- 3 The Quote Printing Options Dialogue displays. Choose the Header and Lines Templates, check the Create History Record Box, enter a Subject, and any notes.
- 4 The Sales Quote displays. For the purposes of this class do not save or email the quote.

Steps - Quote to Order



Your product, industry, customer, and sales process will decide the time and effort necessary to turn a sales quote into a sales order. In the previous scenario we turned a Sales Enquiry into a Sales Quote.

Let's move to the next logical stage and change the Sales Quote into a Sales Order using QAD CRM.

Scenario

Jim would like to move forward but he also believes the product should be discounted. In reviewing the preliminary quote, you are willing to offer Jim a 15% Discount on the NOMAD Cooling Systems if he commits to an order today.

Update the Preliminary Quote with the proposed discount and save the Quote. Change the sales stage to ORDER.

- 1 Navigate to the Auto Manufacturing Nomad Cooling Opportunity.
- 2 Select the Quote Tab and open the first Opportunity line by high-lighting the line and double clicking.
- 3 Enter 15 in the Disc% field. Save. Repeat for the next line.
- 4 Select the Quote Tab and right-click. Choose Change Opportunity Stage in the menu. The Change To Screen appears.

- 5 Populate the Opportunity Stage as ORDER and select the order type: Expected, Provisional, Firm, Sale or Return, Applications/R&D, Exhibition, or Site Trial. Choose an Order Type of Firm for this scenario.
- 6 The check box to send the Order to ERP is checked. Save the Opportunity and QAD CRM will notify you that a Sales Order is created in QAD ERP.
- 7 Select the Order Tab and review the Order. Select the Details Tab and check the Reference Field. The Reference Field is now updated to the Sales Order Number that is in QAD ERP. Please note that Sales Quotes begin with 'SQ' and Sales Orders begin with 'SO'.

Managing an Opportunity - Quote to Order - Recap:

We accomplished the following:

- Changed the Opportunity Stage from QUOTE to ORDER.
- Generated a Sales Order in QAD ERP.
- Located the ERP Sales Order Number on the Details Tab of the Opportunity.

Exercise - Managing Opportunities

Exercise – Managing Opportunities

Change to

Change Opportunity Stage: **QUOTE**

Select Opportunity Positioning:

- ☒ Preliminary
- ☐ Final Quote
- ☐ Deferred

Select Opportunity lines listed below to copy them to stage QUOTE:

Product Line	Product ID	prod_desc	List Price	Cost Price
1000	02-0010	ERASER REFILL PACK IN ERP	1.00	0.00

- Change the Opportunity Stage
- Add an Activity

QAD CRM-670

In this exercise you manage the Opportunity for Denver Auto Suppliers until you close the “deal” and the Opportunity is a Sales Order.

Hands-on Scenario

You follow-up with James concerning his interest in your automotive products. Process the activity you created in the previous exercise and move the opportunity to the next sales stage - Quote.

- 1 Process the follow-up Activity. During this exercise James requests a little better price than list.
- 2 Review the pricing in the Enquiry Stage and change it. Give James a 10% Discount.
- 3 Move the Opportunity to the Quote Stage. What is the Sales Quote Number? Write it down.
Sales Quote = _____.
- 4 Print the Sales Quote. (Do not save the printed quote.)
- 5 Log an activity to demo the products to James in one week.
- 6 One week later process the activity. James was very impressed with the product and placed an order.
- 7 Change the Opportunity Stage to Order. Write down the Sales Order Number = _____.

- 8 Add an Analysis Code to the Opportunity.
- 9 Make sure that you have entered any SWOT information for the opportunity.

Bonus Question How would you export all Opportunities with an Opportunity Stage of Enquiry or Quote to an Excel Spreadsheet?

Opportunities - Knowledge Check

Opportunities – Knowledge Check

	• Complete the Knowledge Check by filling in the blanks with the correct answer or indicating if the statement is "True" or "False". • If you are attending Instructor-Led Training your instructor will discuss your answers.
	• Self-Paced Training participants follow the instructions to log problems or get help. • The answers to the Knowledge Check are in the in the back of the Training Guide.


CRM-680

- 1 An Opportunity must be associated with a Profile, Contact, and Sales Representative (True or False?).
- 2 List the Opportunity Stage values that are predefined in QAD CRM.

g _____

h _____

i _____
- 3 The Opportunity Reference Field contains the following values:

a ERP Sales Quote Number

b User Defined Value

c Blank

d ERP Sales Order Number

e All of the above.
- 4 Opportunities in the Enquiry Stage can be viewed in QAD CRM (True or False?)

Opportunities - Key Points

Opportunities – Key Points

- Review the Chapter Key Points



- Questions?



CRM-690

- Opportunities are business “deals” that are managed from identification until they are turned into sales orders, lost, or postponed.
- Opportunities are in the Sales Forecast if the Include in Sales Forecast Check Box is checked on.
- An Opportunity must be associated with a Profile, Contact, and Sales Representative.
- The Opportunity Stage is a required field that enforces opportunity management and your organization’s selling process.
- Opportunities that are in the Quote or Order Stages are sent to QAD ERP and assigned a Sales Quote Number and a Sales Order Number.
- Quotes can be printed from QAD CRM.

Review Exercise [1]

Review Exercise [1]

Your customer, Medical Devices, Inc., has been purchased by Worldwide Medical Services headquartered in San Francisco, CA.

Worldwide Medical Services has a European Division which operates out of London, England and an Asian Division in Sydney, Australia.

You are now account manager for all of these companies.

Review Exercise [2]

Review Exercise [2]

- Create a Profile and a Contact for:
 - Worldwide Medical Services – Parent
 - Worldwide Medical Services – EMEA
 - Worldwide Medical Services – Asia
 - Create an Opportunity as an Enquiry for the parent company
- You are invited to the world-wide company meeting in San Francisco California
 - create an activity and invite another member of your company to accompany you

Note: You will use this information later in the class.

Chapter 7

Reports and Dashboards

Reports & Dashboards - Overview

Reports & Dashboards - Overview

Available Reports

Name	Description	Procedure to Run	Category
Activity Summary Report	Activity Summary Report	pacsummary.p	Standard
History Report	History Report	rpract.p	Standard
Installed Base Report	Installed Base Report	rinst.p	Standard
Opportunity Report by Sales Rep	Opportunity Report by Sales Rep	nonanalytic.n	Standard

Dashboard

Dashboard name: My Dashboard

Forecast Sales of this year

Orders of this year

Recent activity

Activity type / Status	Closed	Open
Appointment	1	
Email	1	
Letter	2	
Telephone	4	
Total	8	

Top 5 opportunities

- Browser Reports
- Standard Reports
- Dashboards

QAD CRM-720

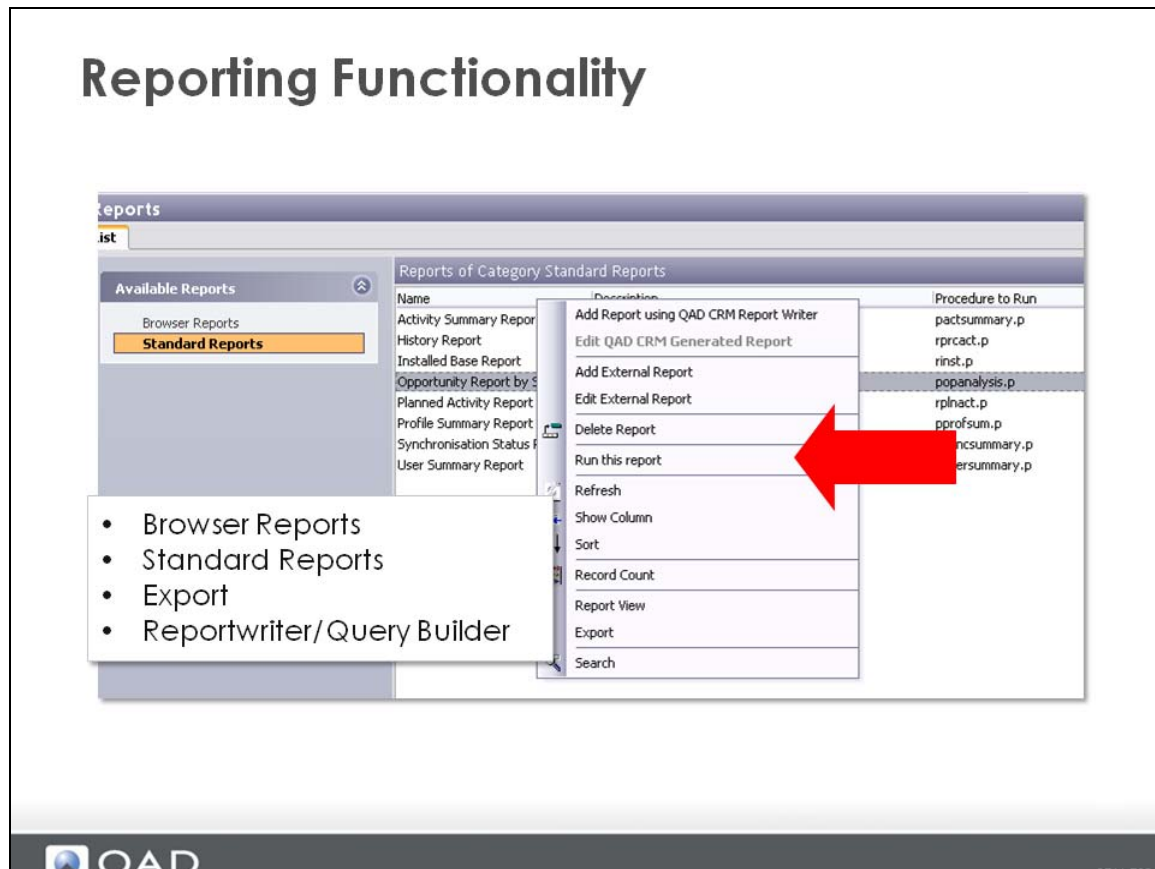
In this chapter you learn how QAD CRM helps you generate the information you need to make strategic decisions by reporting on and analyzing your customer relationships and business opportunities.

Learning Objectives

By the end of this chapter, you will be able to do the following

- List the reporting tools available in QAD CRM.
- Explain Report Categories.
- Create, run, and save Browser Reports.
- List the available Standard Reports.
- Run and filter Standard Reports.
- Discuss the Reportwriter.
- Create charts and graphs.
- Describe a Dashboard.

Reporting Functionality



QAD CRM users can report on their data using the following:

- Browser Reports
- Delivered Standard Reports
- Export data to defined output channels
- Report Writer and Query Builder
- User defined external reports.

Reports Screen

The Reports screen displays the saved reports available for your re-use in QAD CRM.

You also create reports using the Reportwriter tool from the Reports Screen.

The Reports Screen is available from both Sales Management and Marketing Management. The Sales Management navigation path is:

Main Menu | Sales Management | Reports

Report Categories

Reports are filed or saved under report categories which are pre-delivered or defined by your System Administrator. Report Categories allow you to categorize your reports for quick access.

The training system has two Report Categories defined - Browser Reports and Standard Reports. Other common categories include Dashboard Reports, External Reports, or subject categories such as Customer or Profile Reports.

Browser Reports

Browser Reports

Search a Profile or Contact

Name and Location

Profile Name:

☐ Alias name

Address[1]:

Town/City:

County:

State:

Post Code:

Country:

Type:

Profile Name	Address[1]	Town/City	Post Code	Tel No[1]
Anaheim Plaza Hotel	67 Harbor Blvd.	Anaheim	98777	
Avonlea Hospital	56 Atlantic Road	Avonlea	P4A A2W	
ACME STEEL	100 LA		60111	708-990-9999
ABLE Engineering Pty Ltd	599 Dc		08713	
Acme Parts Company	1313 A		07111	
Auto Manufacturing	1000 B		43010	614-432-7000 x 1000
American Steel Company	123 Bk		53186	262-797-1000
Automotive Technologies	13 Balt		93051	866;612-449-3041
Acme Quality Products				

Context Menu Options:

- Refresh
- Show Column
- Sort
- Record Count
- Report View** (highlighted with red arrow)
- Export
- Report
- Send To QAD ERP
- Address Label to Clipboard

Run from any browser window by right-clicking, select Report View

QAD CRM-740

You can run browser reports from any browser within the system. Right-click and choose Report View to display a browser report.

Browser Reports are a quick and easy way to retrieve data from the system. The reports can simply print the contents of the browser or you have the option to format the contents into a more sophisticated report.

Formatting a Browser Report

- A browser report is displayed according to the data in the browser window. You can use the Show Column feature to re-arrange or omit columns from the browser and your report output.
- Once the data is in the Report View you can use the Report View formatting toolbar to format the report:

Saving a Browser Report

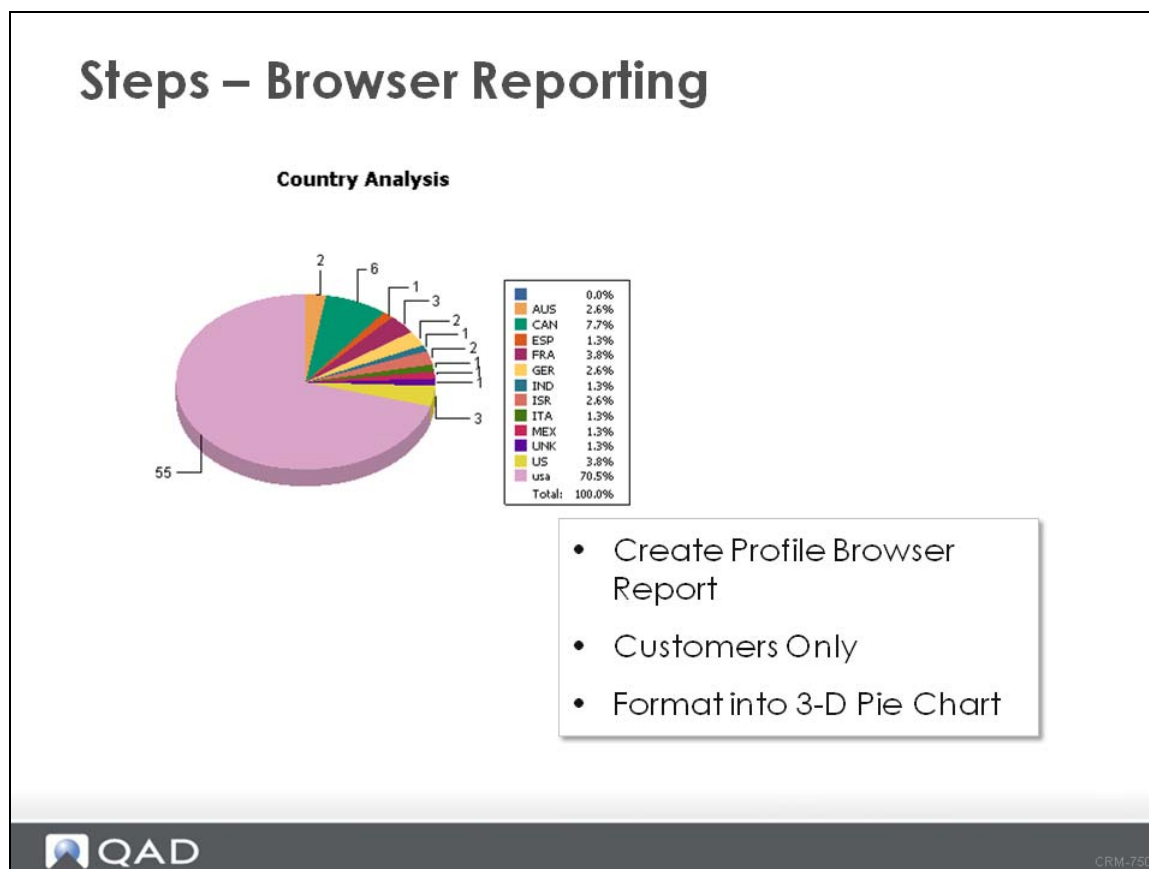
Browser Reports can be saved and re-run. When you save a Browser Report on the Test System save the Report to the Browser Category.

Running a Saved Browser Report

There are two steps to running a saved Browser Report.

- 1 You must be in the browser where the report was created. For instance, the above example of a Customer Profile Report requires that you are in the Profile Browser.
- 2 You can access the saved Browser Reports from the Browser Report drop-down in the report view. You must be in the Report View (right-click, Report View).

Steps - Browser Reporting



Browser Reports can be simple or complex, but they are easily generated by QAD CRM end users.

Scenario

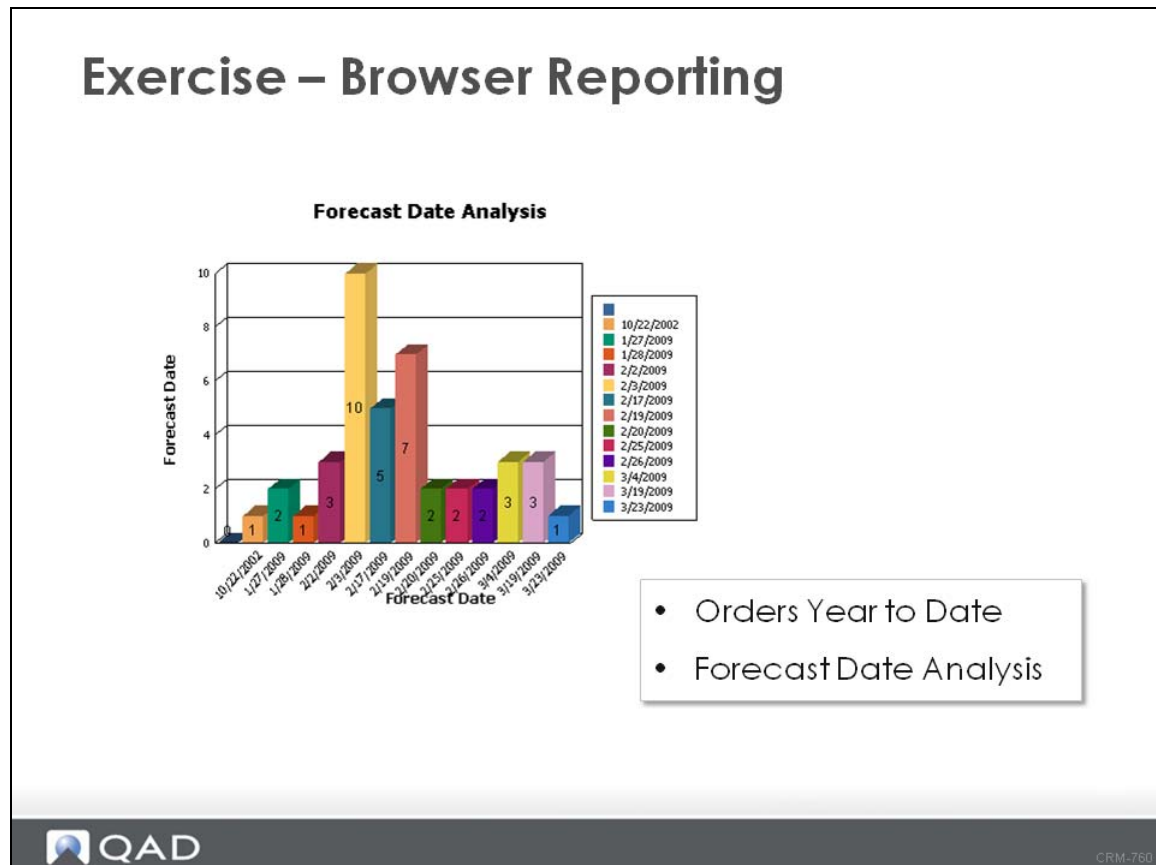
Your manager has requested a report that breaks down the number of Customer Profiles by Country. This type of analysis is easier to understand iff produced in a chart or graph. Let's create a 3-D Pie Chart.

- 1 Navigate to the All Profiles Screen, set filter to No Filter, and right-click to select the Report View.
- 2 The Report View contains a list of All Profiles including Suppliers, Customer, and End Users. You are only interested in Customers.
- 3 In the Report View select Filter from the Toolbar. Choose Simple Filter. Enter the following values in the Customer Filter:
 - Field = *Customer Type*
 - Condition = *Contains*
 - Value = *Customer*
 Save the filter.
- 4 Choose Graph from the Toolbar to launch the Graph Designer. Select Pie and click the 3-D Icon for a 3-D Pie Chart.

- 5 Select the Data Tab and choose the Country Field.
- 6 Select the Format Tab and Type in a Title for the Pie Chart. Save. Save the Browser Report as:
 - Name = *Customer Profile Analysis*
 - Description = *Customer Country Profile Analysis*
- 7 Navigate to the Reports Screen and select the Browser Report Category.

Note If the Browser Report title does not display, fresh the screen (File | Refresh).

Exercise - Browser Reporting



In this exercise you create a Browser Report using the Opportunity Browser.

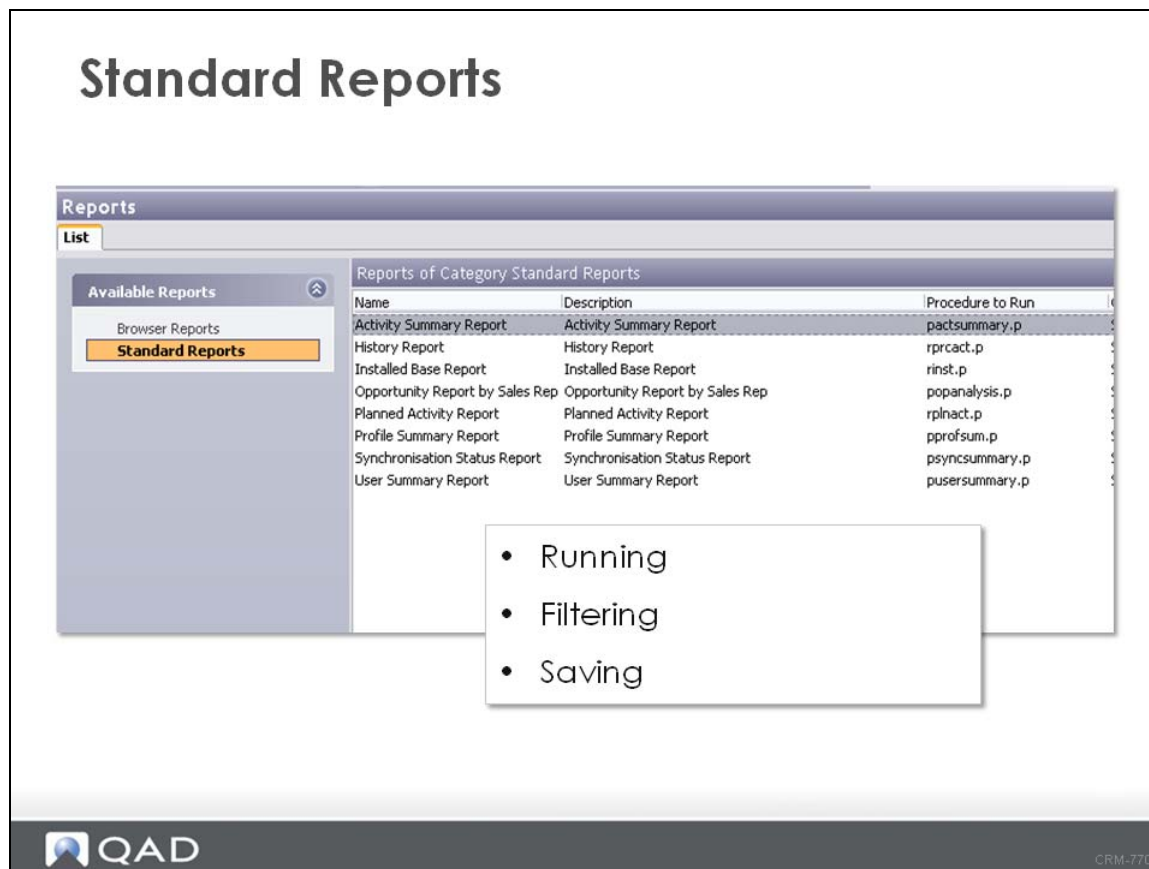
Hands-on Scenario

Your manager has asked you to report on the number of orders year to date and when they were originally forecasted. A 3-D Bar Chart would draw attention to any discrepancies.

- 1 Create a browser report using an existing Filter - Orders Year to Date.
- 2 Format the Graph and Save.
- 3 Re-run the Report/Graph.

Bonus Question When you format the number of columns for a Browser Report using the Show Columns feature, do these settings get saved with the Browser Report?

Standard Reports



QAD CRM delivers the following eight (8) Standard Reports to help you manage your organization. The names of these reports indicate the nature and scope of the data extract. Standard Reports display using Crystal Reports and Microsoft Excel depending on the report.

- Activity Summary Report
- History Report
- Installed Base Report
- Opportunity Report by Sales Rep
- Planned Activity Report
- Profile Summary Report
- Synchronization Status Report
- User Summary Report.

Running Standard Reports

Standard Reports are run directly from the Reports Screen. There are a number of ways to run a report from the Report Screen. Select the report and do one of the following:

- Click Run this report on the toolbar.
- Right-click and choose Run this report.
- Click File | Run this report.

Filtering Standard Report Output

QAD CRM allows you to filter the output from Standard Reports depending on the report. The following reports allow you to define filter criteria from the Report Viewer by clicking the Filter button:

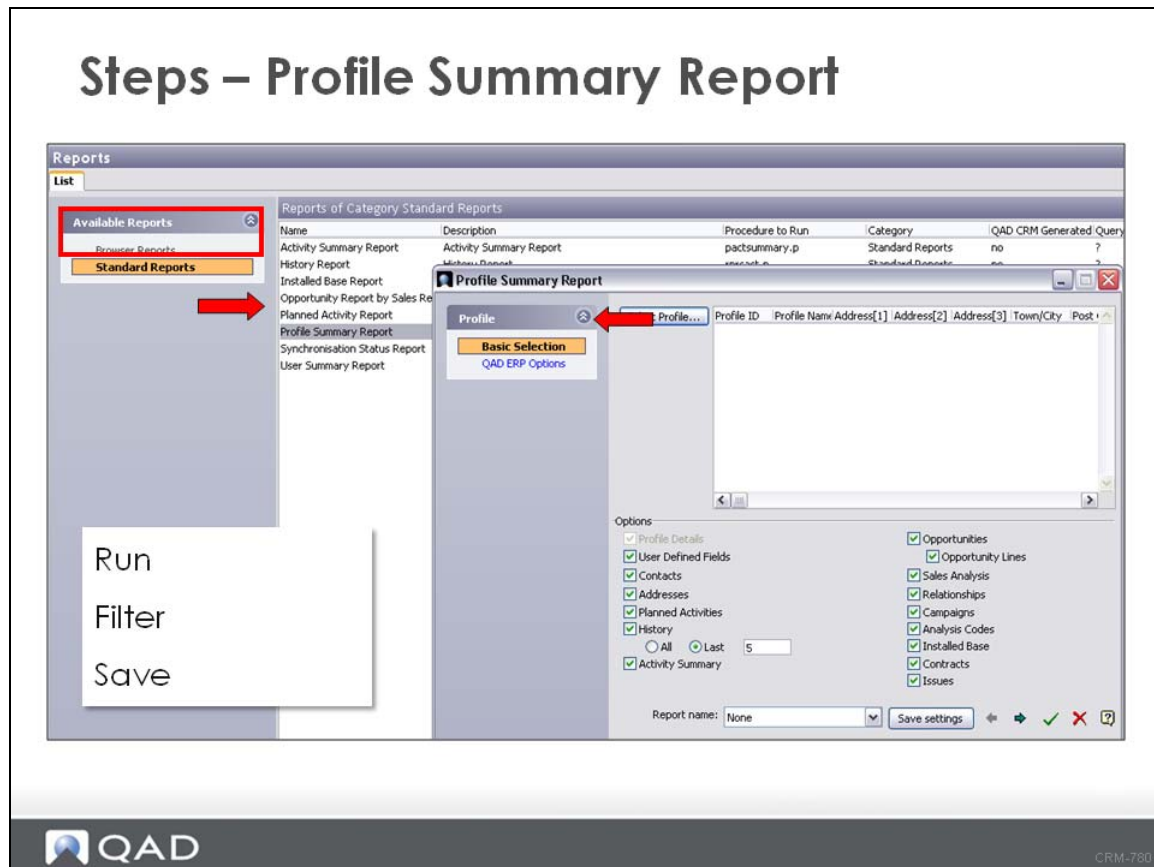
- Activity Summary Report
- History Report
- Planned Activity Report
- Synchronization Status Report
- User Summary Report.

The following reports when run from the Reports screen display a filter window where you define the selection criteria before the report runs:

- Profile Summary Report
- Opportunity Report by Sales Rep
- Installed Base Report.

Note When QAD CRM is integrated with QAD ERP the Profile Summary Report uses data from both applications and the filter settings display an additional filter called QAD ERP options.

Steps - Profile Summary Report



The Profile Summary Report allows you to define data filters for QAD CRM data and QAD ERP data before the report runs. The report is displayed using Crystal Reports.

Scenario

Once a quarter you run a Profile Summary Report for each of your customers. This report gives you a 360 degree view of all activity for the Profile. Today you want to run a Profile Summary Report for ACME Steel.

- 1 Navigate to the Reports Screen. Select the Standard Reports Category and the Profile Summary Report. Right-click to Run this report.
- 2 The Report Filter Screen Displays. Click Select Profile and display the Find Profile/Contact Screen. Select ACME Steel.
- 3 Review the Basic Filter selection criteria and de-select the following filters and move to the next screen - ERP Filters:
 - User Defined Fields
 - Addresses
 - Campaigns
 - Contracts
- 4 De-select the following ERP Filters and Save - click the green check mark:

- Installed Base

Service Contract

- 5 You are prompted to Save the Report Settings so you can re-run the report again. Save the report using the settings above.
- 6 Review the report in the Crystal Report Browser. You can hyper-link to each section of the report from the left hand column, print the report or save the report results.
- 7 The Acme Steel Profile Summary Report appear in the Reports Screen - Standard Reports Category for easy access.

Exercise - Standard Reports

Exercise – Standard Reports

- Activity Summary Report
- Opportunity Report by Sales Rep

QAD CRM-790

In this Exercise you run and filter both types of standard reports: filter setting screen and filters defined in the report viewer.

Hands-on Scenario

Your manager has asked for a report detailing all your activities and the activities for your team for the year. You also want to see an Opportunity Report that has all the opportunities for this year by Sales Representative (in the Training System you will have limited data).

- 1 Run the Activity Summary Report (filters are set in the Report View).
- 2 Do not save the report settings.
- 3 Run the Opportunity Report by Sales Rep (filters are set in the filter screen).
- 4 Save the report settings and re-run the report from the Reports Screen.

Bonus Question Are you able to hyper-link to specific profiles and opportunities in the Opportunity Report by Sales Rep?

Exporting Report Data

QAD CRM allows you to choose the output channel for your data by using the Export option. You can export directly from a browser screen, from the browser report view, or from standard report output.

There are multiple ways to launch the Export Wizard:

- Choose Export from the File menu.
- Right-click and choose Export.
- Click Export on the toolbar from the report display.

The Export Wizard prompts you to choose one of the following output channels:

- Application
- Disk File
- Microsoft Exchange Folder
- Mail Recipient

Printers

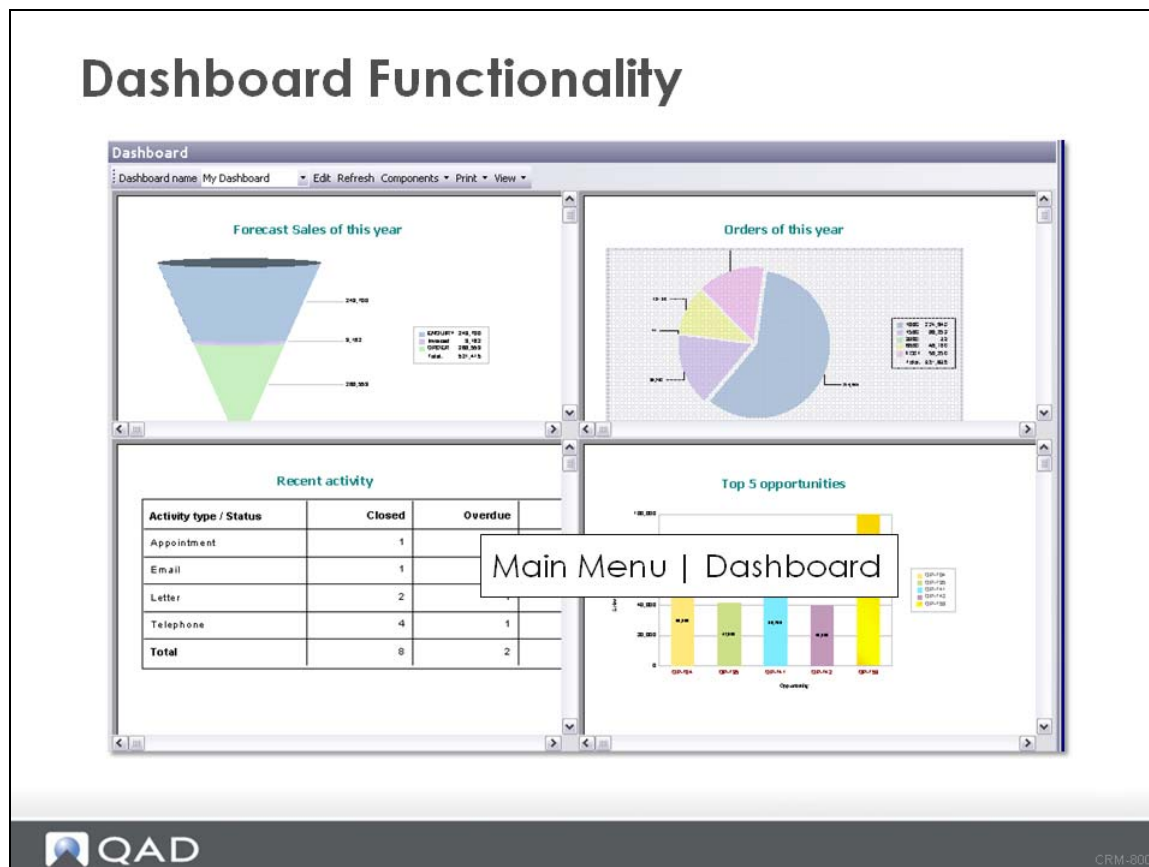
You are allowed to export your data to the following applications from the VTMS (Training) Environment:

- Acrobat Format (.pdf)
- Crystal Reports
- Internet Explorer - HTML or XML
- Microsoft Excel
- Microsoft Word - Document or Rich Text
- WordPad
- Notepad

What is the Reportwriter?

- The Reportwriter is another report writing tool available to QAD CRM. Typically power users or reporting experts will use the Report writer to generate user-defined reports that are based on queries.
- A System Administrator defines the queries that the report is based on using the Query Builder.
- The Reportwriter and Query Builder are discussed in the System Administrator Training.

Dashboard Functionality



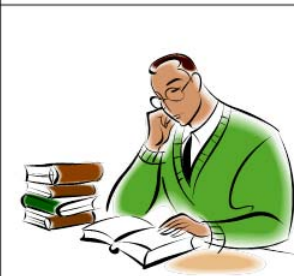
- The Dashboard is a user defined screen that provides an overall view of your CRM environment.
- The Dashboard screen can be composed of a maximum of four separate views or components.
- Typically a Dashboard is created and maintained by a System Administrator or power user or reporting specialist.

Navigate to: Main Menu | Dashboard and choose My Dashboard from the Dashboard Name. Review the information displayed in the dashboard.

How to maintain and create Dashboards is covered in the CRM User Guide and in the System Administrator Training.

Reports & Dashboards - Knowledge Check

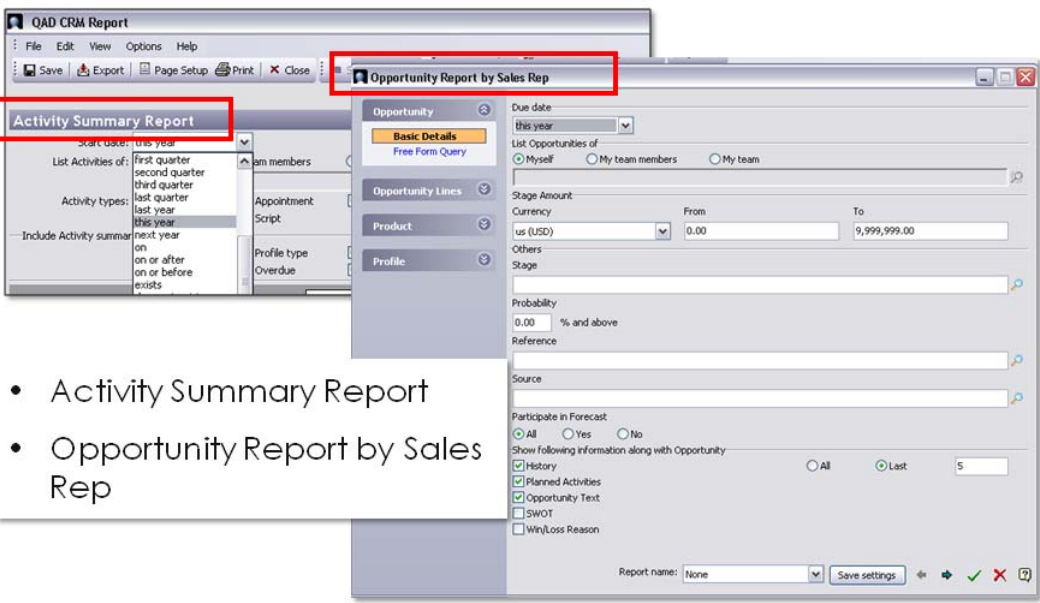
Reports & Dashboards – Knowledge Check



- Complete the Knowledge Check by filling in the blanks with the correct answer or indicating if the statement is "True" or "False".
- If you are attending Instructor-Led Training your instructor will discuss your answers.
- Self-Paced Training participants follow the instructions to log problems or get help.
- The answers to the Knowledge Check are in the back of the Training Guide.

Exercise - Standard Reports

Exercise – Standard Reports



- Activity Summary Report
- Opportunity Report by Sales Rep

- 1 Report Categories are used as file drawers or containers to help us organize and access our saved reports quickly. (True or False?)
- 2 When you save a browser report you can access the report from any record browser in QAD CRM. (True or False?)
- 3 In the Browser View Report you can remove fields, change fonts, sort and group data, and create_____.
- 4 Name the Standard Report that uses both QAD CRM data and QAD ERP data if integration is active. _____.
- 5 Name three (3) applications that you can export your data to for reporting:
 - f _____
 - g _____
 - h _____
- 6 Dashboards can contain a max of _____ components.

Reports & Dashboards - Key Points

Reports & Dashboards – Key Points

- Review the Chapter Key Points



- Questions?



CRM-820

- QAD CRM has a number of reporting tools and options including:
 - Browser Reports
 - Delivered Standard Reports
 - Exporting data to a variety of output channels (including Microsoft Excel and Word)
 - Reportwriter Reports based on Queries
- Browser Reports are created and launched from record browsers.
- Saved Browser Reports can be accessed from View Report.
- Standard Reports are predefined and use Crystal Reports or Microsoft Excel to display output.
- Dashboards are typically created by System Administrators.
- Dashboards can contain up to five components (charts, graphs) and give users a view of their CRM business - opportunities, forecast, activities, etc.
- Standard Reports use two types of filters, one filter is part of the report viewer and the other filter must be defined before you run the report.
- Reportwriter Reports work together with Query Builder and are usually defined and maintained by System Administrators, power users, or reporting specialists.

Chapter 8

Advanced Features

Advanced Topics - Overview

Advanced Topics - Overview

- Using Scripts
- Addresses
- Profile Relationships
- Customer Console
- ERP/CRM Integration



CRM-830

This chapter contains a number of QAD CRM advance features that build on the knowledge gained earlier in the training.

Learning Objectives

By the end of this chapter, you will be able to do the following

- Define Profile Relationships
- Explain and use scripts
- Use the Customer Console
- Explain the ERP/CRM Integration

Advanced Topics - Overview

The screenshot displays the QAD CRM-840 interface with several key components:

- Hierarchical Relationship:** A tree view on the left showing a hierarchy starting with 'Parent-Colossal Conglomerates', branching into 'Sub-Electronics Mart' and 'Sub-Universal Industries', which further branches into 'Sub-Electrical Devices'.
- Script Details:** A panel showing script information for 'customer-1', including a description 'Customer Survey', date entered 'May-04-2009, Mon', status 'Live', and comments 'New Script'.
- Customer Console:** A central panel with tabs for 'Addresses', 'Sales Quote', and 'Sales Order'. It contains various input fields and dropdown menus for data entry.
- Context Menu:** A menu is open over the 'Sales Order' tab, listing actions such as 'Go To', 'Go To QAD ERP', 'Refresh', 'Show Column', 'Sort', 'Record Count', 'Report View', 'Export', and 'Search'. A secondary menu on the right lists related entities like 'Activity', 'Sales Quote', 'Sales Order', 'Invoice', 'Call', 'Installed Base', 'Contract', 'Relationship', 'Comparative Sale', 'Account', 'Sales History', 'Statistic', 'Ship-To', and 'End User'.

- Profile Relationships
- Using Scripts
- ERP/CRM Integration
- Customer Console

Profile Relationships

Profile Name	Address[1]
Beverages-Asia	22 Bloor Street
Beverages-Worldwide	24 Main Street
Beverages-EMEA	24 rue de Vannes

- What is a Profile Relationship?
- Adding/Viewing Relationships
- Main Menu | Sales Management | Addresses | Profile Relationships

The organizations that you do business with can relate to one another in an organizational hierarchy. For instance, there could be a parent company with many subsidiaries.

Your organization might want to manage all related companies under one account management structure or at the very least understand how the entire customer organizations are doing business with you.

The Relationship Tab on the Profile Record allows you to represent your Profiles Relationships. You can add, maintain and delete organizational hierarchies. The Relationship Tab allows you to see all Profiles, Contacts, Opportunities and Installed Base Records (products installed at the profile site) for those Profiles that are related.

Steps - Profile Relationships

Steps – Profile Relationships

The screenshot shows the 'Profile Details - Colossal Conglomerates LTD' window in the QAD CRM-860 application. The 'Relationships' tab is active. A context menu is open over the 'Hierarchical Relationship' icon, displaying options: Attach Hierarchy, Add Hierarchy, Add Sub Hierarchy, Rename, Delete, and Refresh. A callout box on the right side of the window lists the steps: 'Create Relationship: ✓ Hierarchy, ✓ Sub Hierarchy' and 'View Profiles, Contacts, Opportunities'. The bottom of the window features the QAD logo and the text 'CRM-860'.

When Profiles are related in the hierarchy all contacts, opportunities, and installed base products can be viewed from the Relationship Tab of each of the Profiles.

Scenario

Your customer Colossal Conglomerates LTD has just purchased the following organizations that you do business with:

- Electronics Mart
- Universal Industries.

You've also learned that Electrical Devices out of Chicago is a spin-off of the Electronics Mart organization.

Let's set up these relationships!

- 1 Navigate to the Profile for Colossal Conglomerates LTD. Select the Relationships Tab.
- 2 Right-click Hierarchal Relationships and Add Hierarchy. Name the Hierarchy: Parent-Colossal Conglomerates.
- 3 Right-click in the Relationships Profile Tab and add the Profile Colossal Conglomerates.
- 4 Review the following Colossal Conglomerate information:
 - Opportunities Tab

- Relationship Opportunity Tab
- Relationship Contact Tab

Note The information contained in the Colossal Conglomerate Record is also displayed in the appropriate tab under Relationships.

- 5 Electronics Mart and Universal Industries are both companies that report to Colossal Conglomerate. Right-click the Parent-Colossal Industries and Add a Sub-Hierarchy named Sub-Electronics Mart.
- 6 High-light Sub-Electronics Mart in the Hierarchal Relationships and attach the Profile in the Relationship Profile tab (Right-click).
- 7 Repeat for Universal Industries. Make sure that they are both equal “subs” in the Hierarchy.
- 8 Electronics Mart is the “parent” company of Electrical Devices. Right-click Sub-Electronics Mart and add Electrical Devices.
- 9 If you Click the Relationship Installed Base Tab in Colossal Conglomerates you will see the products that are installed in both Colossal and Universal.
- 10 Navigate to any of the Profiles in the hierarchy and check the Relationship Tab. Check and un-check the include Sub Hierarchies box at the bottom of the screen - what data do you see?

Profile Relationship Exercise

In this exercise you setup the Profile Relationship for the Worldwide Medical Profiles that you added in the Review Exercise.

Hands-on Scenario

You want to have a view into all the Profiles associated with Worldwide Medical. You can name the Hierarchy and Sub-Hierarchies what makes sense for your organization.

- 1 Add the Profile Relationships for the Worldwide Medical Companies.
- 2 Create a report of all Contacts for the Relationship. Format the report - add title, etc.

Bonus Question: How would you add an existing hierarchy?

Exercise - Profile Relationships

Exercise – Profile Relationships

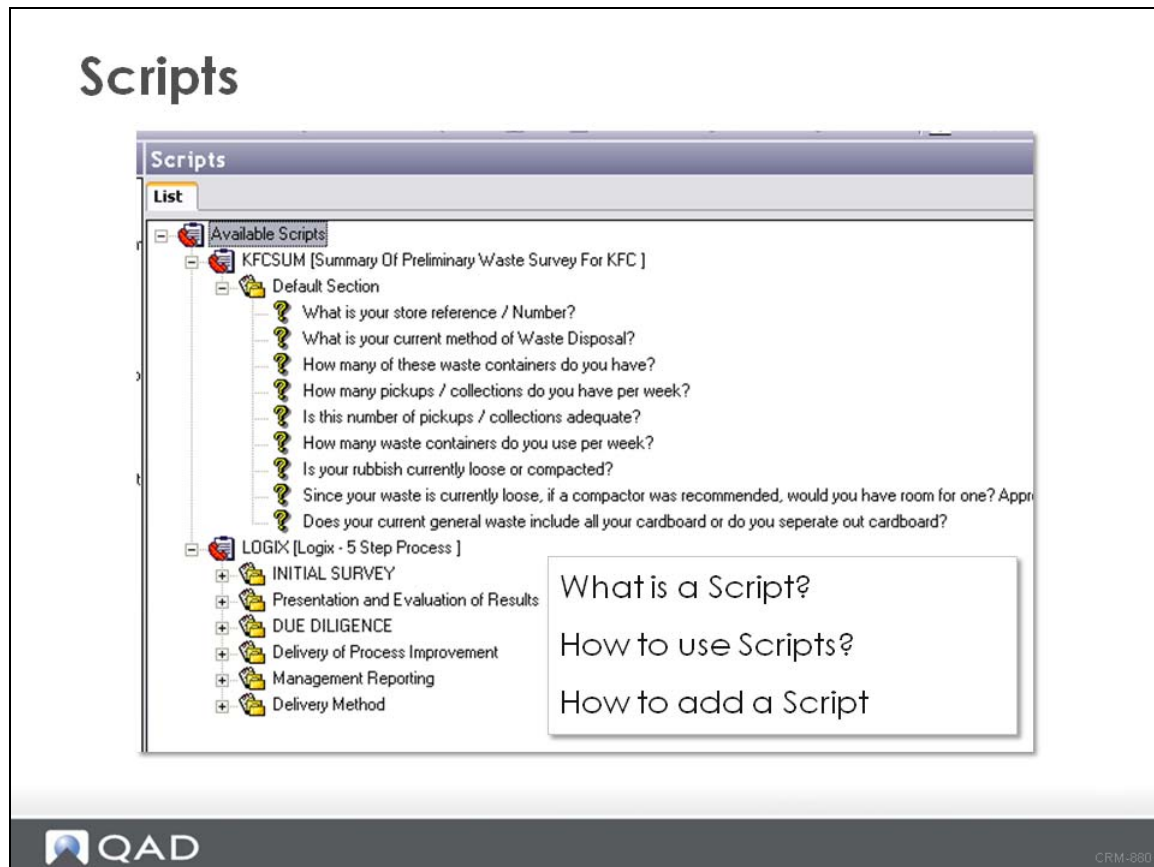


Worldwide Medical Profiles

- Parent
- EMEA
- Asia

Setup Profile Relationship

Scripts



A Script is a series of predefined questions designed to streamline and add consistency to your communications with your customers.

Typically System Administrators or Power Users will create scripts for use in various departments.

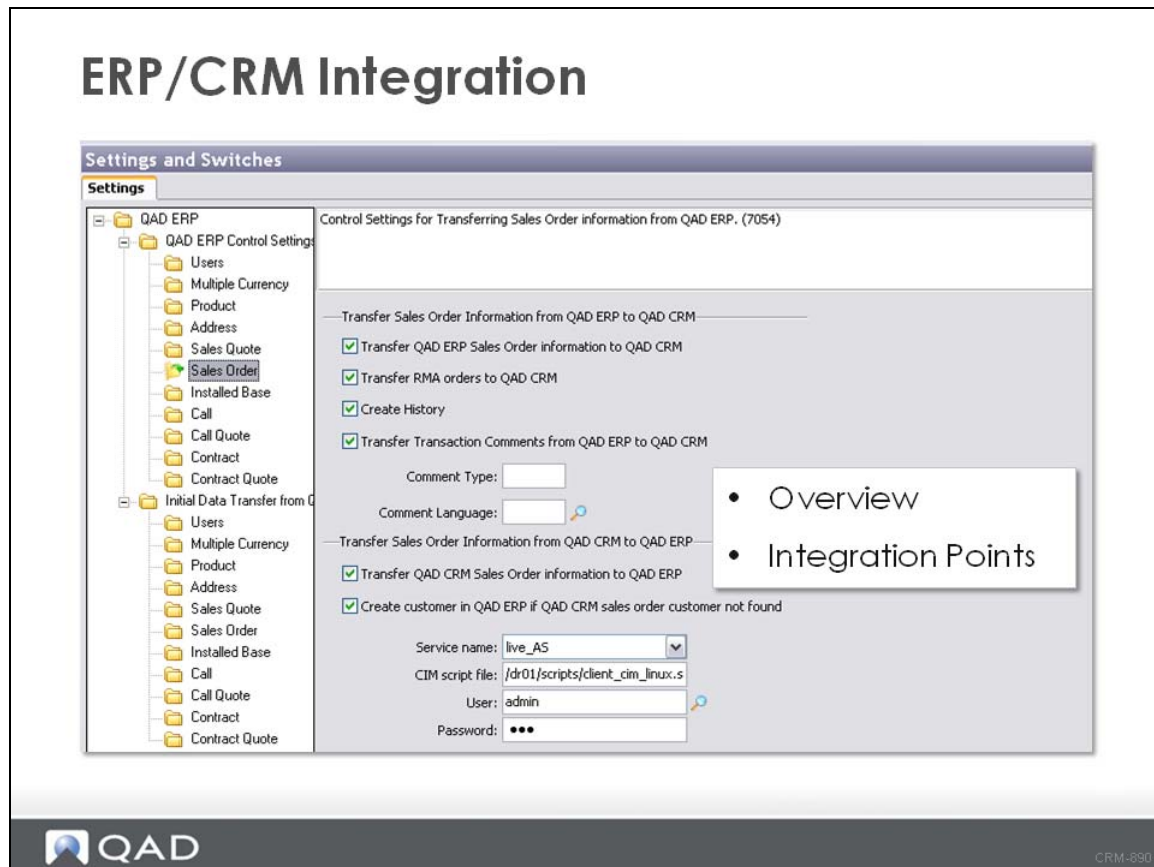
For instance, Customer Service would enter service related questions in a script that would be used by customer service representatives to survey the customer base.

Sales can use a script during a new product release to queue sales representatives as to the important questions to ask a customer. Sales might also find a script useful to query customers on re-order amounts for certain products that a customer re-orders on a regular basis.

Using Scripts

- 1 Script Creation - developed first in a prototype phase called test.
- 2 Attaching or Scheduling the script to a target: activity or add in Script Tab.
- 3 Processing the Script.
- 4 Analyzing script responses.

ERP / CRM Integration



QAD CRM runs in stand-alone mode as a CRM Application or can be integrated with QAD ERP applications.

Your system administrator will set up this integration according to your business rules and processes. For instance, your organization might want to restrict the flow of data from QAD CRM to QAD ERP for certain processes.

Once integration is defined and set up, the data synchronization is automatic. Database and session triggers update the data.

In the Training Environment when we add a new Profile we are asked if we want to send this Profile to QAD ERP. However, when we change the Opportunity Stage from Enquiry to Quote the Quote is automatically sent to QAD ERP.

The following modules can be integrated:

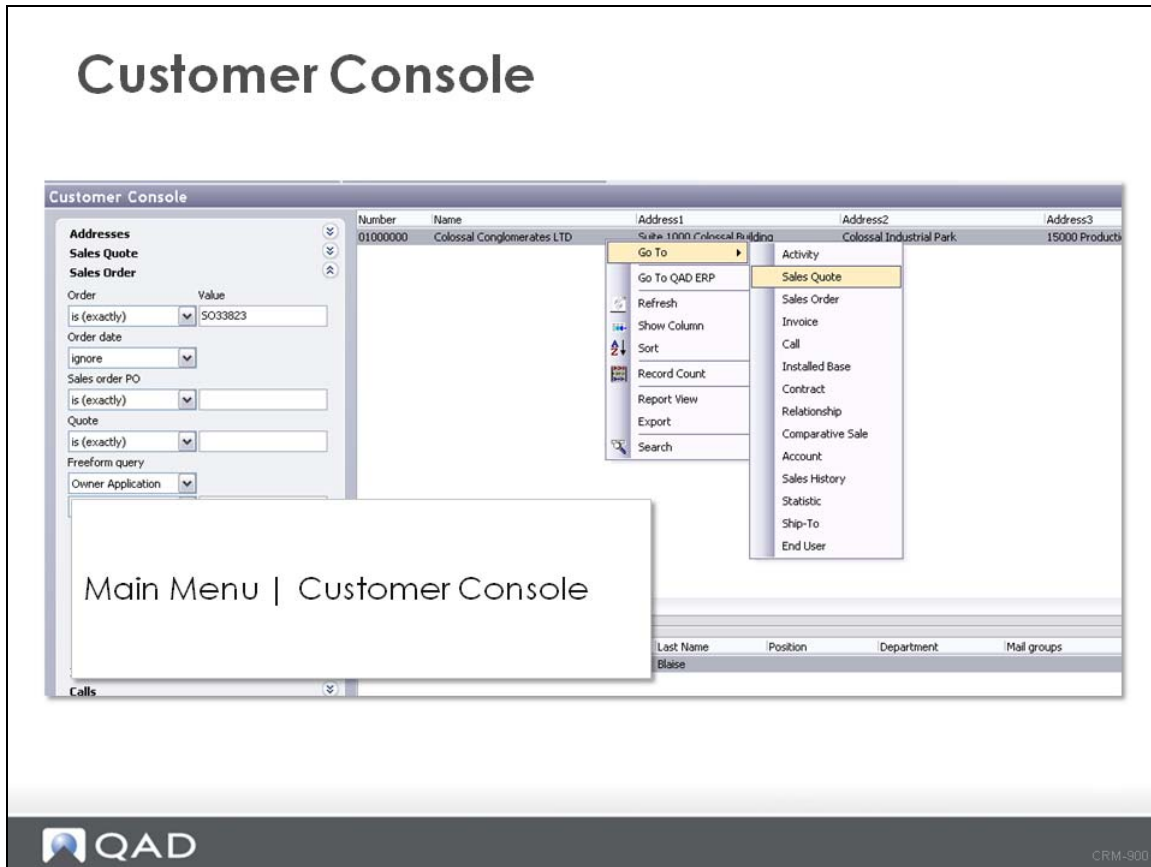
- Product
- Address
- Sales Quote
- Sales Order
- Installed Base
- Call
- Contract

- Contract Quote
- Call Quote
- Multiple Currency
- Users

As a sales or account manager you would not set this integration up but there could be times when you want to have access to the data that is in QAD ERP.

In the next chapter we review the Customer Console and how you can easily toggle and share information between QAD ERP and QAD CRM.

Customer Console



The Customer Console is uses data from both QAD ERP and QAD CRM. This application or module truly provides a 360 degree view of your customer when QAD ERP integration is enabled.

The Customer Console Screen is designed and operates much like the Search a Profile or Contact Screen.

The Customer Console searches QAD ERP based on your input and returns the appropriate data. You also have the option to Go To QAD ERP or to Go To a particular screen in QAD ERP such as the Sales Order or Sales Quote Screen.

Note You must have access to QAD ERP and QAD ERP integration must be enabled in order to use the Go To options.

Exercise - Customer Console

Exercise – Customer Console

The screenshot displays the QAD Customer Console application. The top navigation bar includes tabs for 'Vertical Industry View', 'Customer Maintenance', and 'Customer Maintenance'. The main content area shows the 'Customer Address' tab, which contains fields for Customer Number (01000000), Name (Colossal Conglomerates LTD), Address (Suite 1000 Colossal Building), City (Evanston), State (IL), Post (090876), and Country (USA). The 'Customer Data' tab shows fields for Sort Name (Colossal Conglomerates LTD), Salesperson (W.L. INC), Ship Via (GROUND), AR Acct (1200), Resale (P313768), and Remarks (ALL SHIPMENTS PER CORP CONTRACT A-009091). A text box overlay in the bottom right corner reads 'Go To QAD ERP Review Data in QAD ERP'.

In the Training Environment QAD ERP integration is enabled.

Hands-on Scenario

In the Opportunity Module you Changed the Opportunity Stage from Enquiry to Quote and from Quote to Order. You also have added a number of Profiles in QAD CRM and sent those Profiles to QAD ERP. Let's Review our work.

- 1 Check that the Sales Quotes are in QAD ERP for each of your opportunities. Search on the Sales Quote number.
- 2 Review the new profiles by searching on Customer Number.

Advanced Topics - Knowledge Check

Advanced Topics – Knowledge Check



- Complete the Knowledge Check by filling in the blanks with the correct answer or indicating if the statement is "True" or "False".
- If you are attending Instructor-Led Training your instructor will discuss your answers.
- Self-Paced Training participants follow the instructions to log problems or get help.
- The answers to the Knowledge Check are in the in the back of the Training Guide.



CRM-920

- 1 You do not need a logon to QAD ERP when you Go To QAD ERP from QAD CRM. (True or False?)
- 2 Scripts are considered activities in QAD CRM. (True or False?)
- 3 The list the information shared among Profiles that have relationships defined:
 - i _____
 - j _____
 - k _____
 - l _____
- 4 The Customer Number in the Profile is updated when the Profile is added to QAD ERP. (True or False?)
- 5 The integration between QAD CRM and ERP is enabled on-demand from QAD CRM. (True or False?)

Advanced Topics - Key Points

Advanced Topics – Key Points

- Review the Chapter Key Points



- Questions?



CRM-930

- Profile Relationships are set up in hierarchies and show the relationships between customers.
- You can add hierarchies to a relationship or you can attach existing hierarchies to a relationship.
- Once a Profile Relationship is set-up, all Profiles in the relationship share the following data: Profiles, Contacts, Opportunities, and Installed Base from the Relationship Tab.
- Scripts can be used by all roles in your organization - sales, marketing, customer service, etc.
- Scripts are a series of questions that when processed record the answers in QAD CRM.
- Scripts can be attached to a target (Profile/Contact) from the Script Tab or they can be added as an Activity.
- The Customer Console allows you to easily verify and share information between QAD CRM and QAD ERP.

Final Exercise

In the Final Exercise you get an opportunity to practice everything you've learned about Sales Management using QAD CRM.

Please use Help to research any questions you might have.

Good Luck!

Scenario

You've been asked to turn-over all of your customers in the State of Kansas to Craig Rice. Please update your Profiles and add yourself as an internal contact for each of these customers. You will also need to schedule a meeting with Craig to go over each of customers.

You receive an email from one of the Sales Representatives in New York with information concerning a potential customer in California which is your territory. The prospect is Sterling-Waverly which is owned by the Sterling Industries in New York. Enter the following information in the system concerning this prospect or lead: (make up the information below)

- Profile Name and Address
- Contact Name - phone number
- Set up the relationship with Sterling Industries
- Create an activity to record the information that your receive from the NY Sales Rep or add a note to record this information.
- Call the potential contact and set-up a meeting. Send some literature.

Your receive a call from Jim Barber of ACME Steel concerning the Mechanical Pencil Opportunity; Jim would like a Quote. Update the Enquiry to 1000 items, give him a discount and print the quote.

Check to ensure that the new profile you just entered is in QAD ERP.

Run a the report that will tell you everything about ACME Steel - print it.

Create chart that shows how many Opportunities are in each Opportunity Stage.

