QAD Enterprise Applications

Training Guide
Customer Relationship Management (CRM)

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QAD Customer Relationship Management 6.6.2
November 2014

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Contents

QAD Customer Relationship Management Change Summary

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

Date/Version	Description	Reference
November 2014/6.6.2_Rev1	Updated the slide notes and added answers to Mastery Questions in slides.	-
April 2014/6.6.2	Rebranded for QAD CRM 6.2.2	
March 2013/6.6.1	Updated exercises and move them to the end of each chapter	-
	Moved CRM Security to Chapter 1 Introduction	Page 10
	Updated information of logging on to training environment	Page 17
	Updated information on All Profiles Screen	Page 35
	Moved Exporting Reports from Profiles chapter to Reports and Dashboards chapter.	Page 97
October 2012/6.6	Added a new section on contact synchronization	Page 52
	Added a new section on activity synchronization	Page 69
	Added a new section on Customer Visit Reports Management	Page 70
	Updated steps of sending email	Page 66
	Added a new section on email synchronization	Page 67
June 2012/6.5.1	Rebranded for QADCustomerRelationshipManagement(CRM) 6.5.1	-

About This Course

This section introduced the content and requirements of the Customer Relationship Management Training.

Course Description

Additional Resources

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

Use the hands-on exercises in this book 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

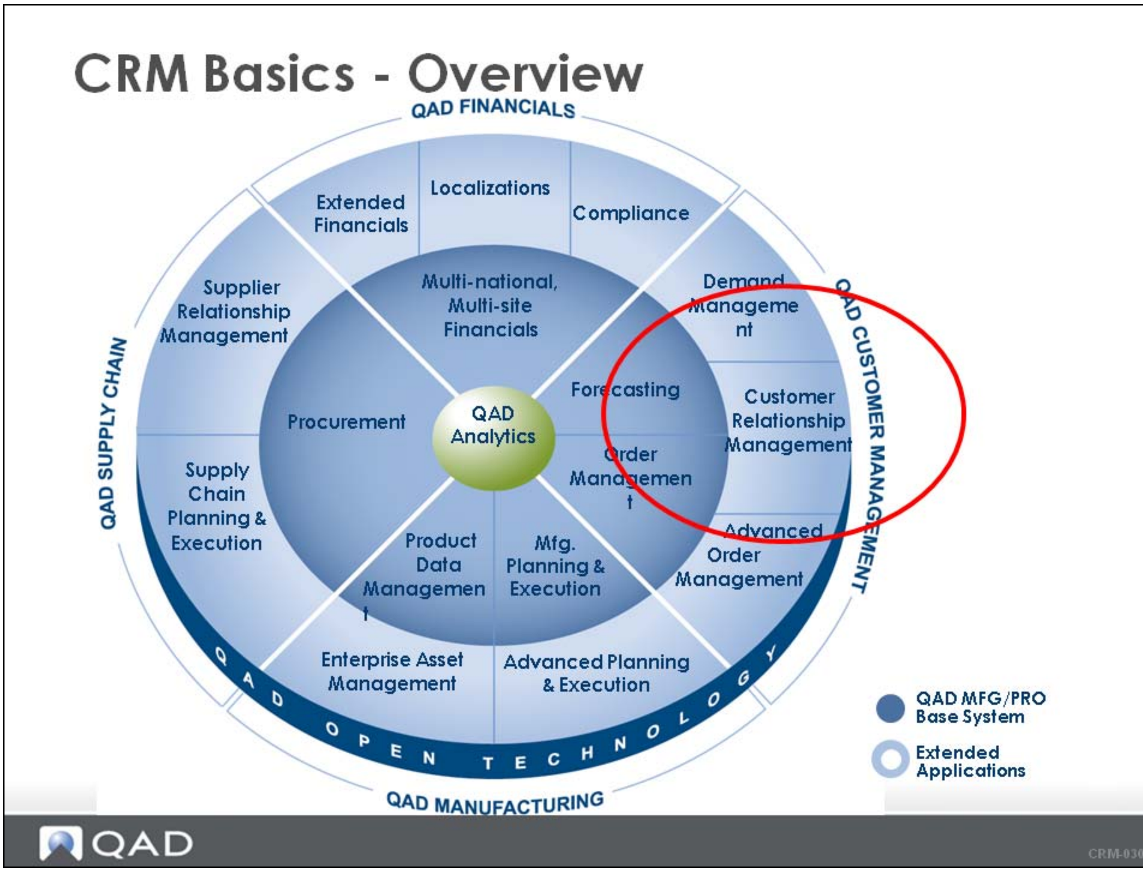
Support also offers an array of tools depending on your company’s maintenance agreement with QAD. These tools include the Knowledgebase and QAD Forums, where you can post questions and search for topics of interest. To access these tools, choose Visit Online Support Center under the Support tab.

Chapter 1

Introduction to QAD CRM Sales Management

This chapter provides an overview of the basic concepts of the QAD CRM Sales Management.

Overview



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

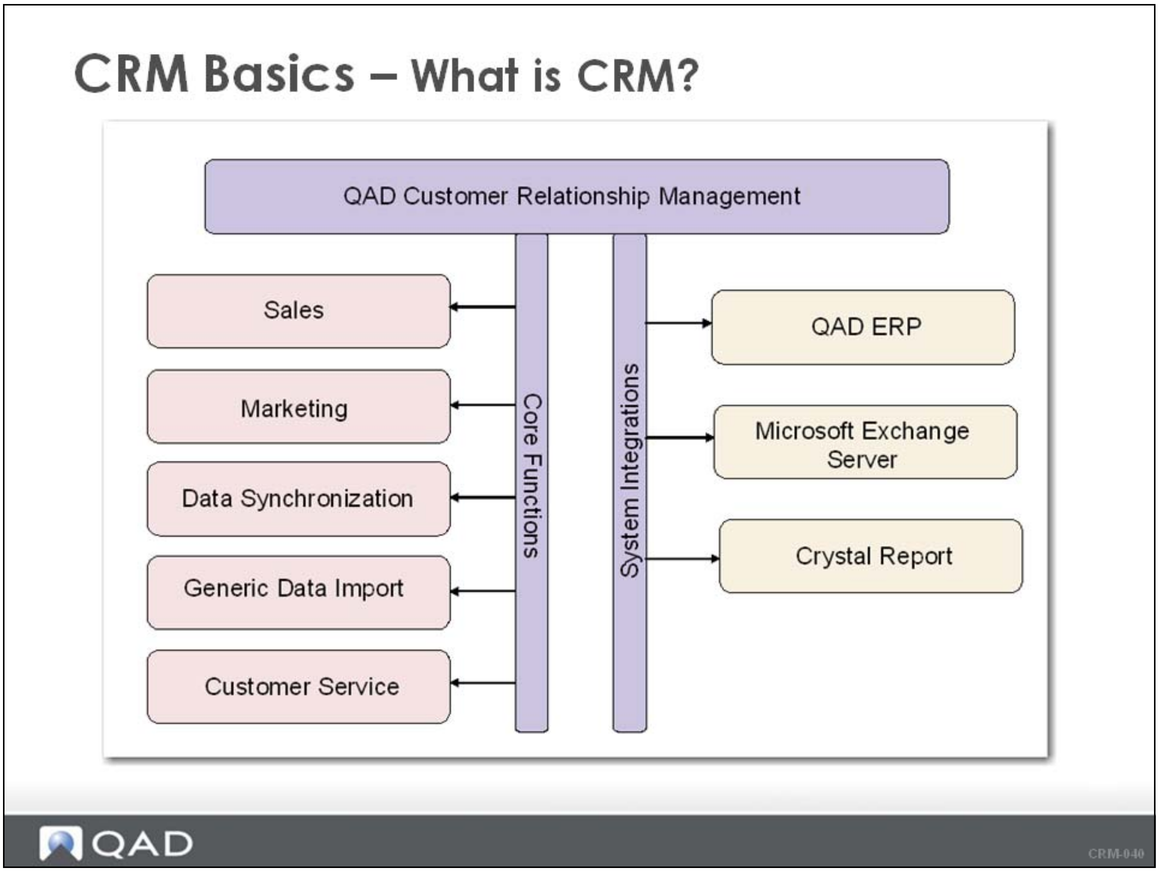
QAD Customer Management Solutions run and measure marketing campaigns, manage sales opportunities through the sales lifecycle, and optimize the order and fulfillment process while ensuring customer retention by enabling you to anticipate your customer's needs quickly.

Learning Objectives

By the end of this chapter, you are 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 can accomplish these same activities using QAD CRM
- Describe CRM security

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.

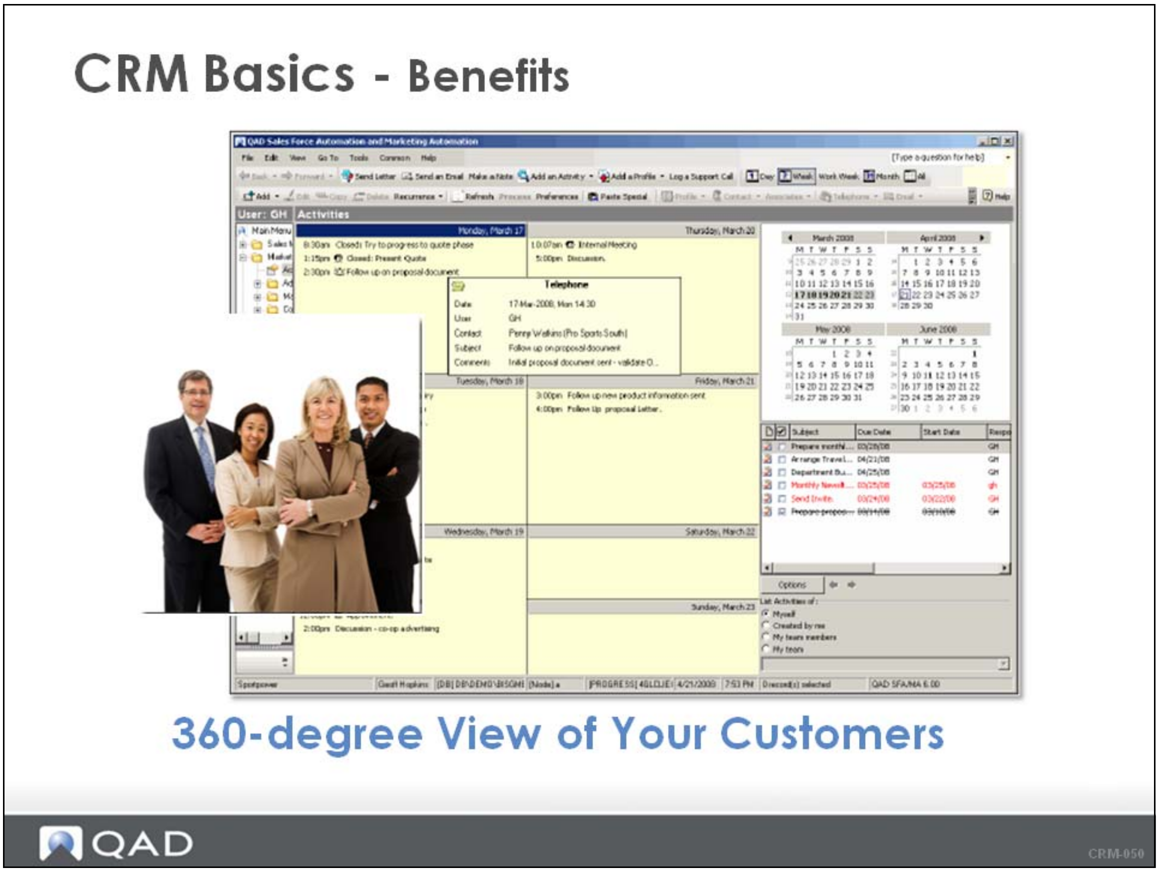
QAD CRM contains the following modules that share data:

- 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

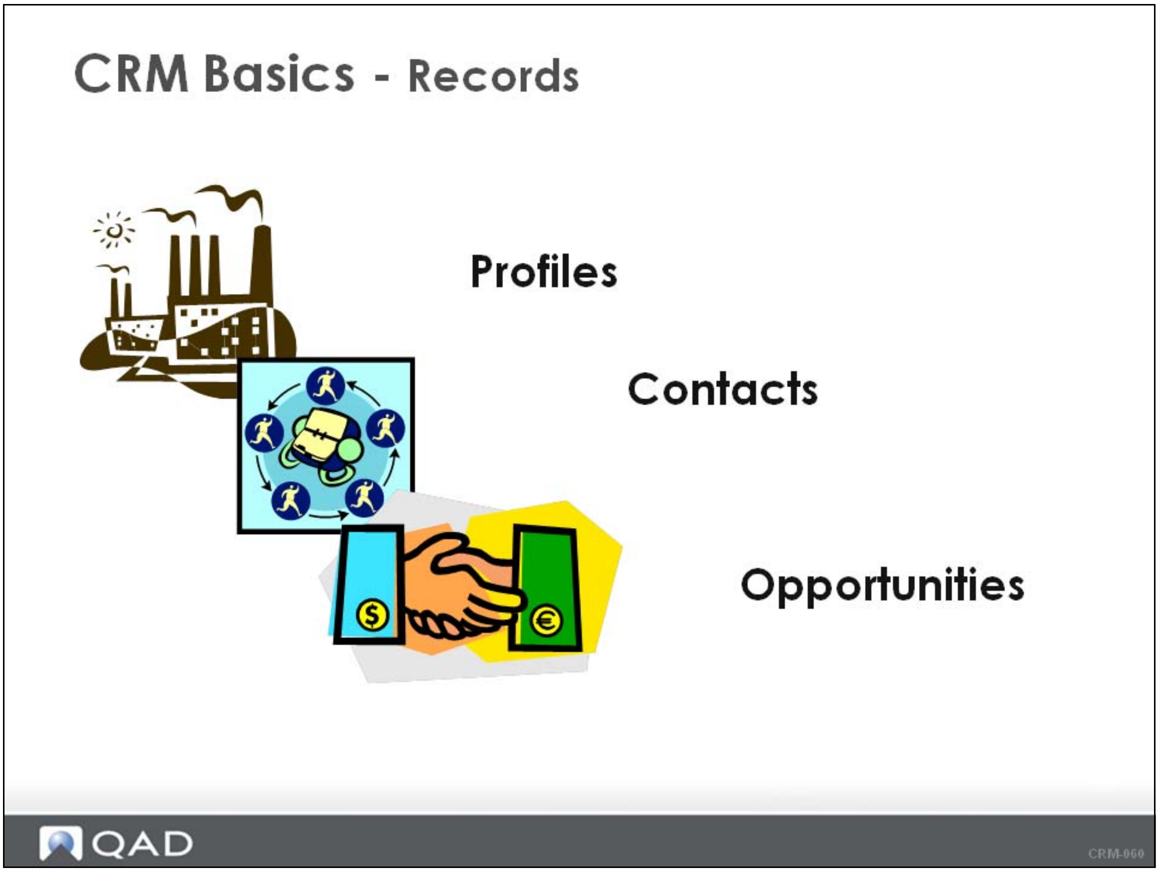


A sound CRM strategy enables your business to be efficient, productive, and responsive to the demands of your Customers and improve your internal communications. QAD CRM provides a 360-degree view of your customer, integrating prospect, customer, and partner information at every touch point.

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 Records



QAD CRM has a number of records that you can manage. Before you see a demonstration of QAD CRM, let us 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”.

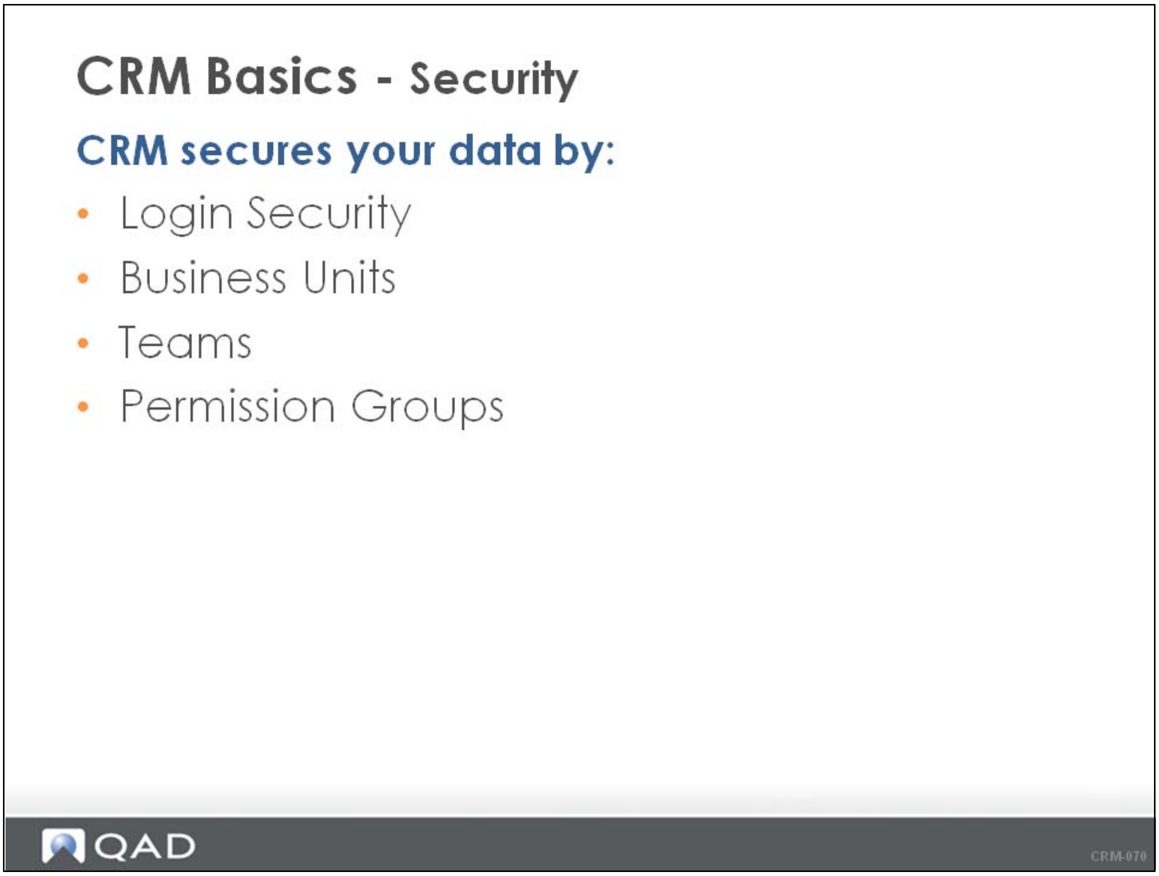
Contact

- 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 to convert them into actual business sales.

CRM Security

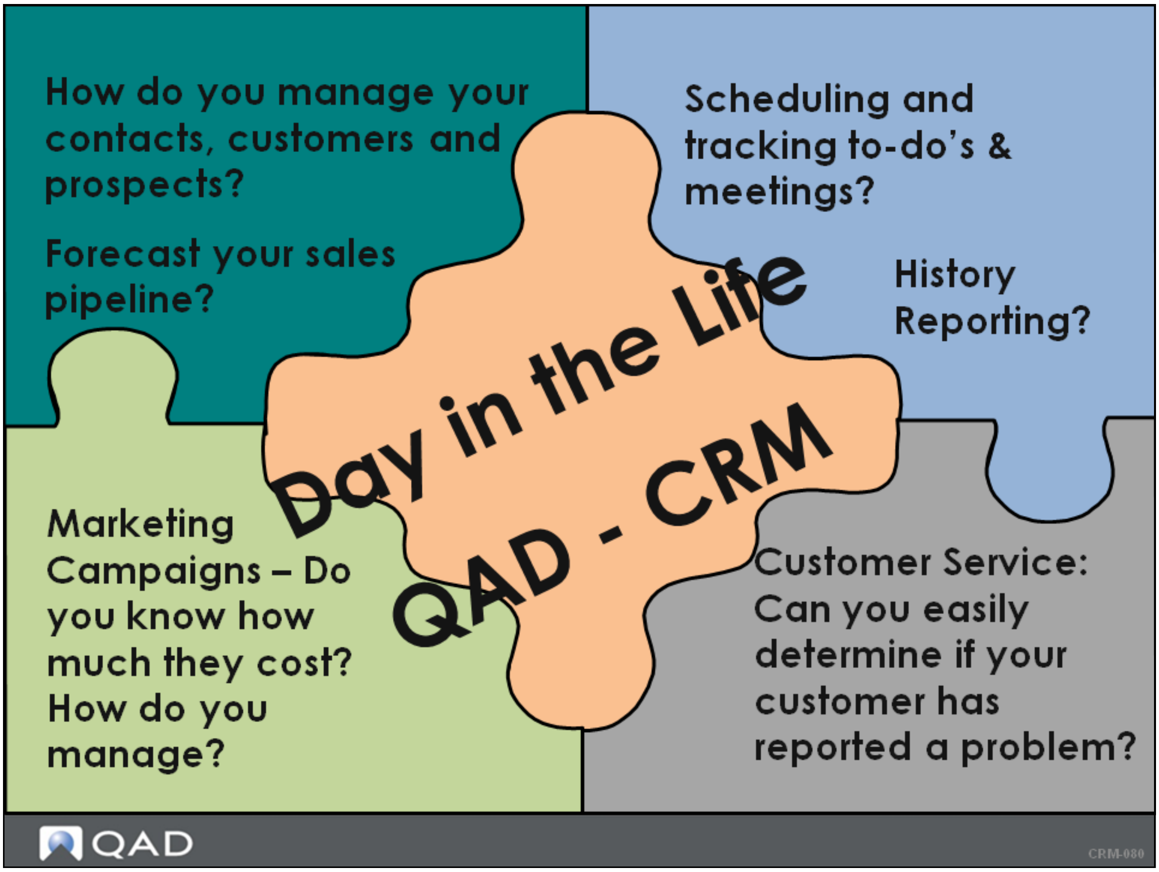


Security in QAD CRM involves the following system features or components:

- Login Security - It 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 - 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.

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 slide?
- How can 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 can QAD CRM help you manage and motivate your team?

Master Questions

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?)

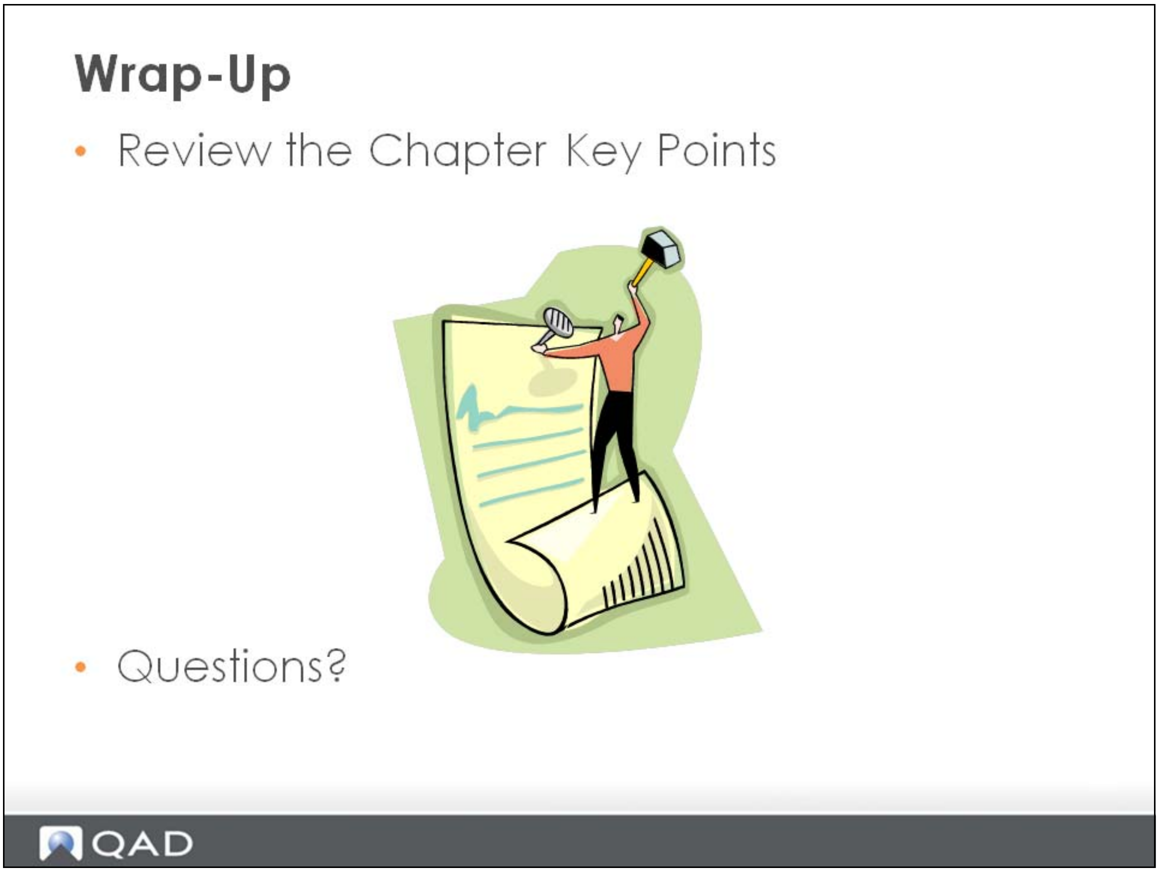
4 List two benefits of CRM QAD:

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

6 QAD CRM allows _____ login attempts. After _____ incorrect attempts QAD CRM shuts down.

7 QAD CRM has the following security: login, business unit, _________________, and permission group. (Fill in the blank.)

Wrap-Up



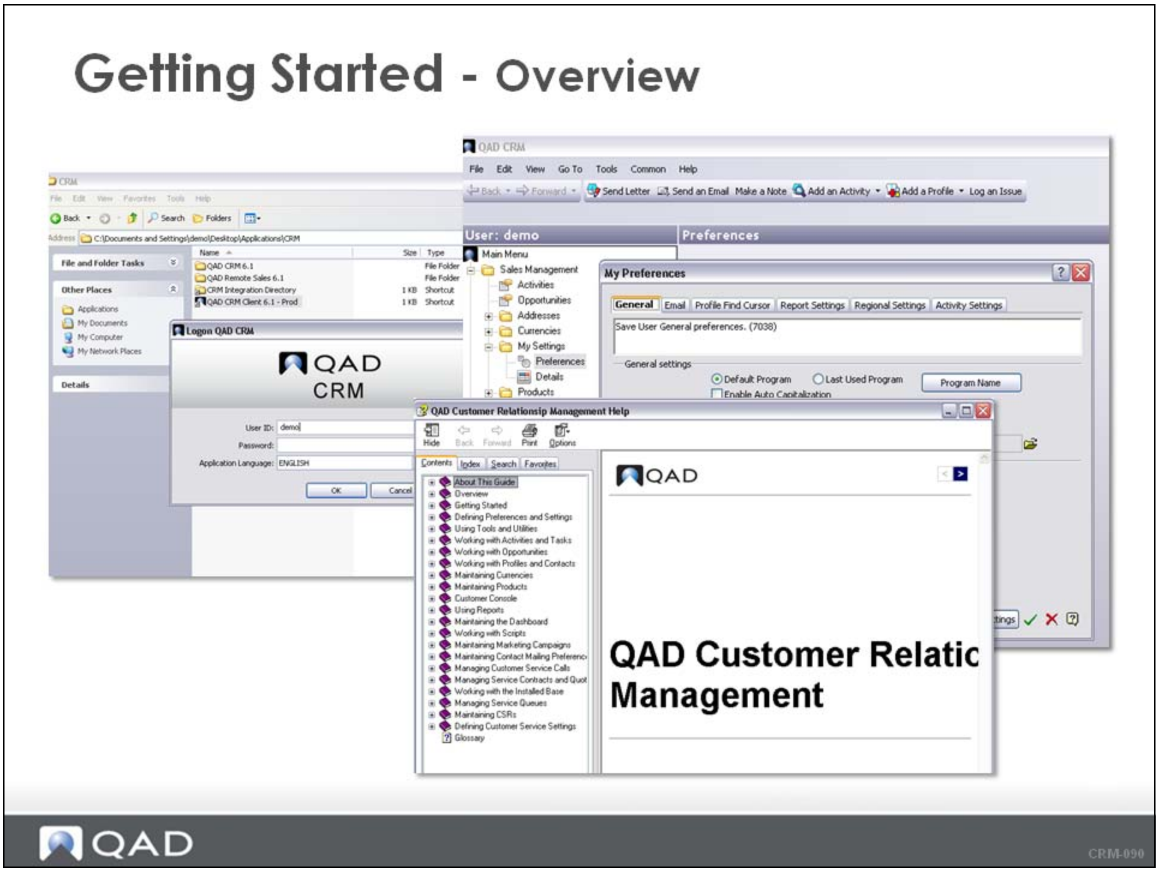
- CRM is an approach to understand customer requirements and behavior.
- CRM includes studying sales and marketing effectiveness and market trends.
- CRM requires a customer-centric business philosophy to support effective marketing, sales, and service processes.
- QAD CRM is the tool that allows you to implement your customer-centric strategy using the following modules:
  - Sales Force Automation
  - Marketing Automation
  - Customer Service
  - CRM/ERP Integration
- QAD CRM modules share 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.
- Your information is secure in QAD CRM but can also be shared by business unit and teams.

Chapter 2

Getting Started

This chapter provides information on the features of the QAD CRM user interface and how to navigate in the system.

Overview



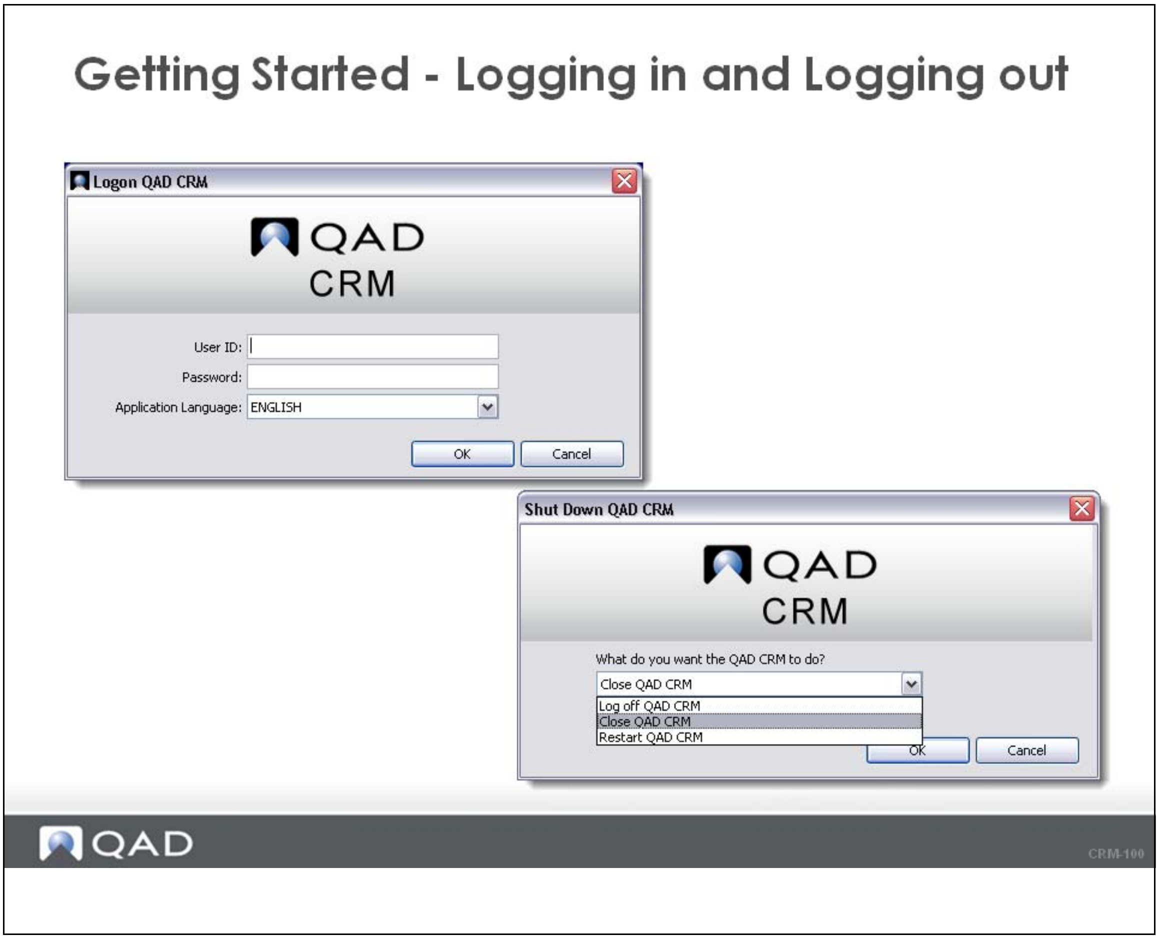
In this chapter, you learn how to access, navigate, and use help in QAD CRM. You can review and change your QAD CRM settings and gain an understanding of QAD CRM data security.

Learning Objectives

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

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

Access and Exit



Logging in to 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.

To log in to CRM:

1 Follow your instructor's direction to access the CRM login screen

2 In the QAD CRM login screen, enter the User ID and Password.
   - User ID**:** demo
   - Password: qad

3 Choose an application language.

   In the training environment, the Application Language field is set to English, by default. However, QAD CRM does support multiple languages.

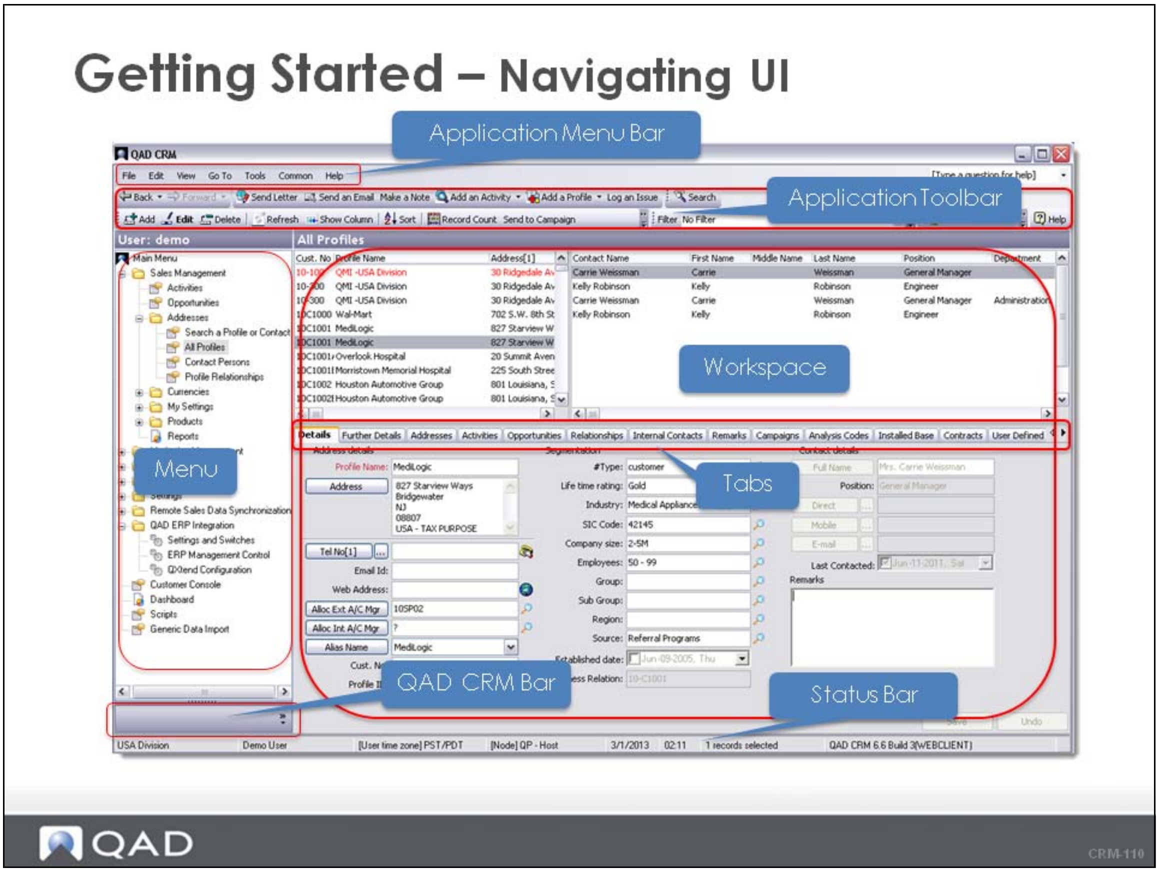
4 Select USA Division (10USA) as the workspace to log on and click OK.

   Note The succeeding exercises in this Training Guide are basing on the data of USA Division (10USA) workspace.

Logging out of CRM

1. Select the File|Exit option from the Main Menu.
   The Shut Down dialogue box displays.
2. Select Close, Log off, or Restart from the drop-down list and click OK.

User Interface



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

- Application Menu Bar

  The menus provide options for you to perform tasks on CRM, customize the view display, and access help.

- Application Toolbar

  The toolbar contains shortcuts to tasks, which are module-specific. You can customize the buttons to display using the context menu or the View menu on Application Menu Bar.

- Workspace

  Typically the workspace has two parts. The top half is a browser displaying data records for the selected module. The bottom half displays the selected record details in edit mode.

- Sidebar menu

  All system menus are listed here in functional modules. You can hide or display the menu pane using View menu on Application Menu bar.

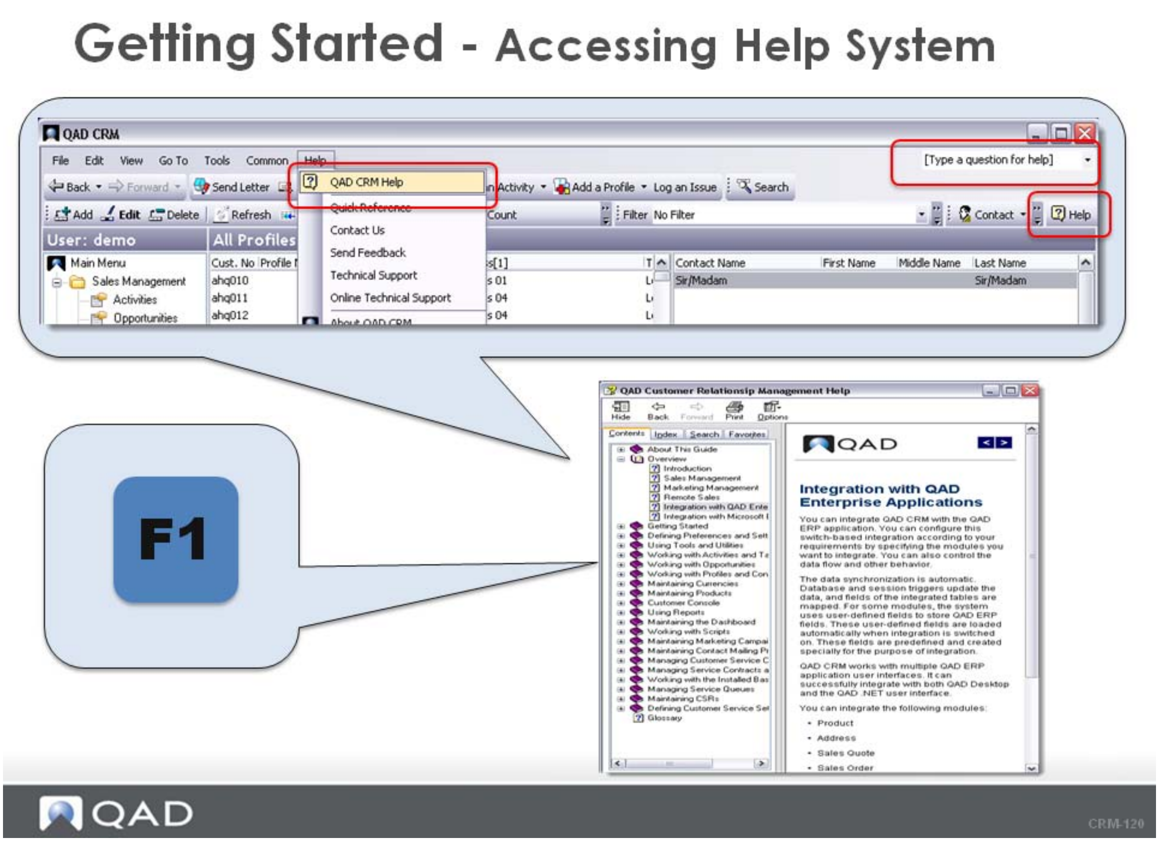
- QAD CRM Bar

  QAD CRM Bar contains shortcuts of menus that you add to favorites. You can hide or display this bar using View menu on Application Menu Bar.

- Status Bar

The status bar at the bottom of the screen displays the company, user, user time zone, node name and type, client type, date, time, number of selected records, and software version.

Help System



Accessing Help System

To access the help system, do any of the following:

- Press F1 on your keyboard.
- From the Application Menu Bar, click Help|QAD CRM Help.
- In the text box at the upper-right corner of the window, enter a specific question and press Enter. The relevant help file for your question opens in a separate window.
- If available, click Help on the Application Toolbar.

Printing Help Topics

You can print help topics. Here is an example of printing all information about Profiles and Contacts:

1. From the Application Menu Bar, click Help|QAD CRM Help.

   The Help system displays.

2. Click Working with Profiles and Contacts in the sidebar menu.

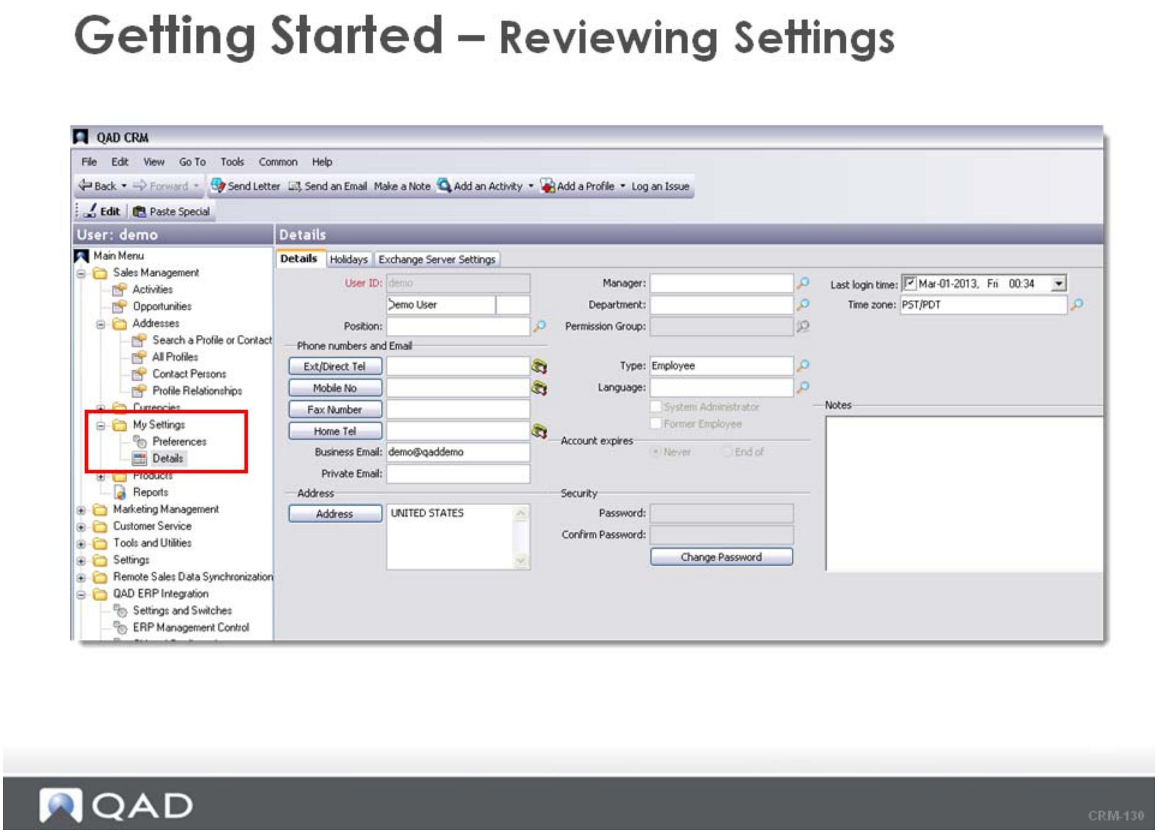
   The Help content displays in the workspace.

3 Click Print at the top of the page.

The Print Topics dialog box displays.

4 Select the option you need and click OK.

Reviewing Settings



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 varies depending on your organization.

For the purposes of this class, we review the system and detail settings Demo. The changes that we make will be used in exercises later in this class.

Reviewing 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 and review the description about the settings. Your System Administrator will set these settings for you.

4. Do not save any changes and click Close to exit.

Reviewing My Details Settings

1. Navigate to Sales Management|My Settings|Details. The Details screen displays your personal details. Always check this screen to make sure 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 and review the description about the settings.
4. Click the Ext/Direct Tel Field. The Phone/Fax dialogue displays. Enter your phone number and click OK.
5. Click Save to save and exit.

Important Do not change your password.

Master Questions

1 QAD CRM supports multiple languages. (True or False?)

2 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?

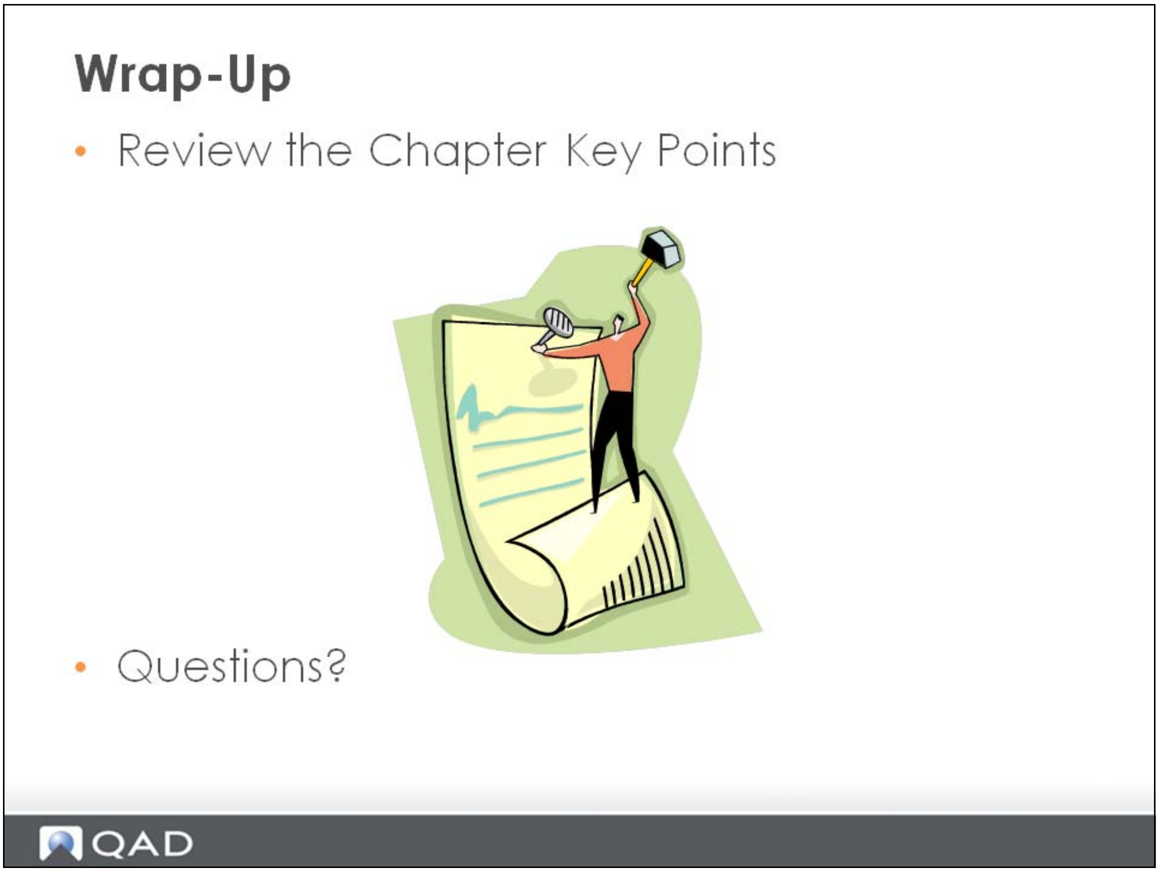
____

3 The menu items that you add to favorites appear as shortcuts on QAD CRM Bar. (True or False?)

4 You can customize which toolbars to display using View menu. (True or False?)

5 QAD CRM Help can be accessed online and can also be printed. (True or False?)

Wrap-Up



- QAD CRM and QAD product suite do not share navigation. QAD CRM does not use .NET UI or process maps.
- QAD CRM supports multiple languages. You are prompted for a language during login when your organization uses more than one language.
- QAD CRM UI contains Menu, Workspace, and toolbars. The details information of a record that you select in the top part of the Workspace is displayed in edit mode in the bottom part. You can customize the display of toolbars.
- Help in QAD CRM is easy to access online. You can print online help by topic or topic and all subtopics.
- You are able to review and change your personal details.

Exercise

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

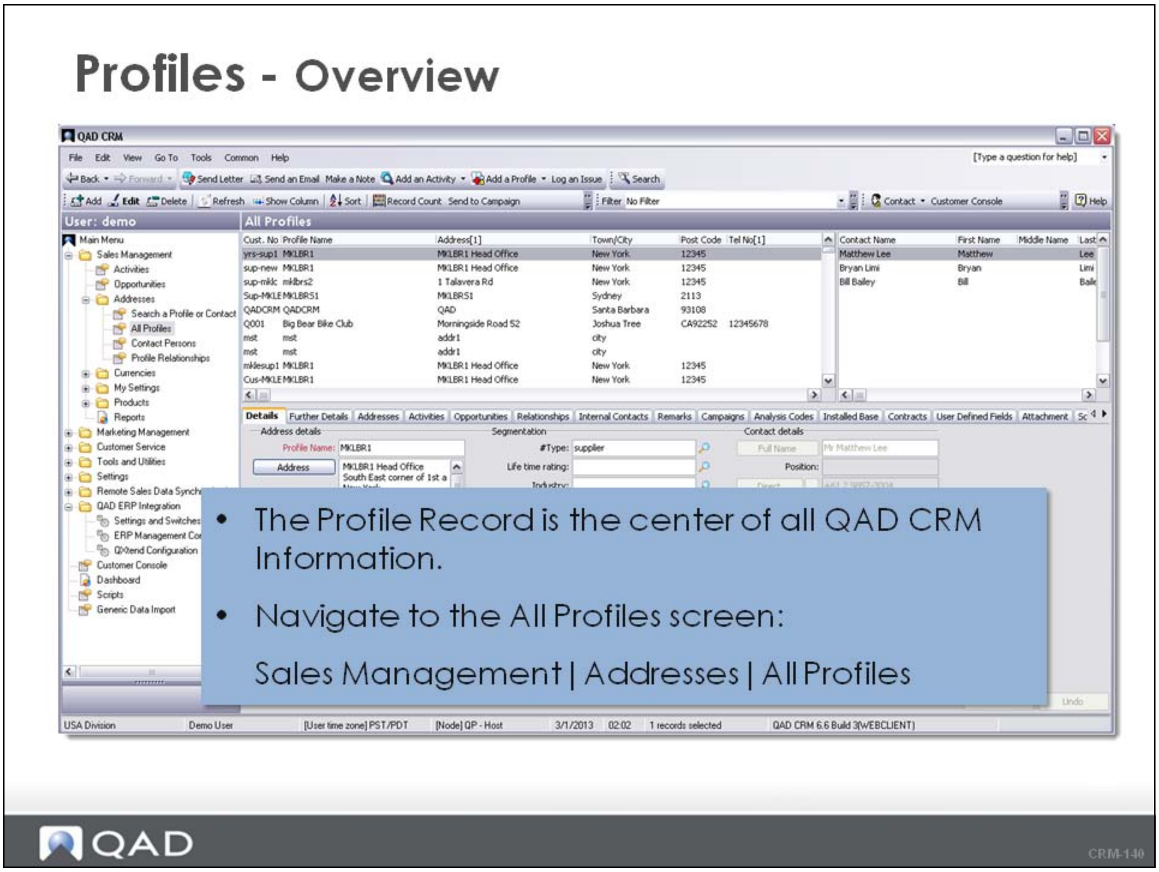
1. Go to Sales Management|My Settings|Details.
2. Enter a mobile phone number.
3. Enter your work email.
4. Enter your address.
5. Save your work.
6. Log off QAD CRM.

Chapter 3

Profiles

This chapter provides an overview of profiles and information on using profiles.

Overview



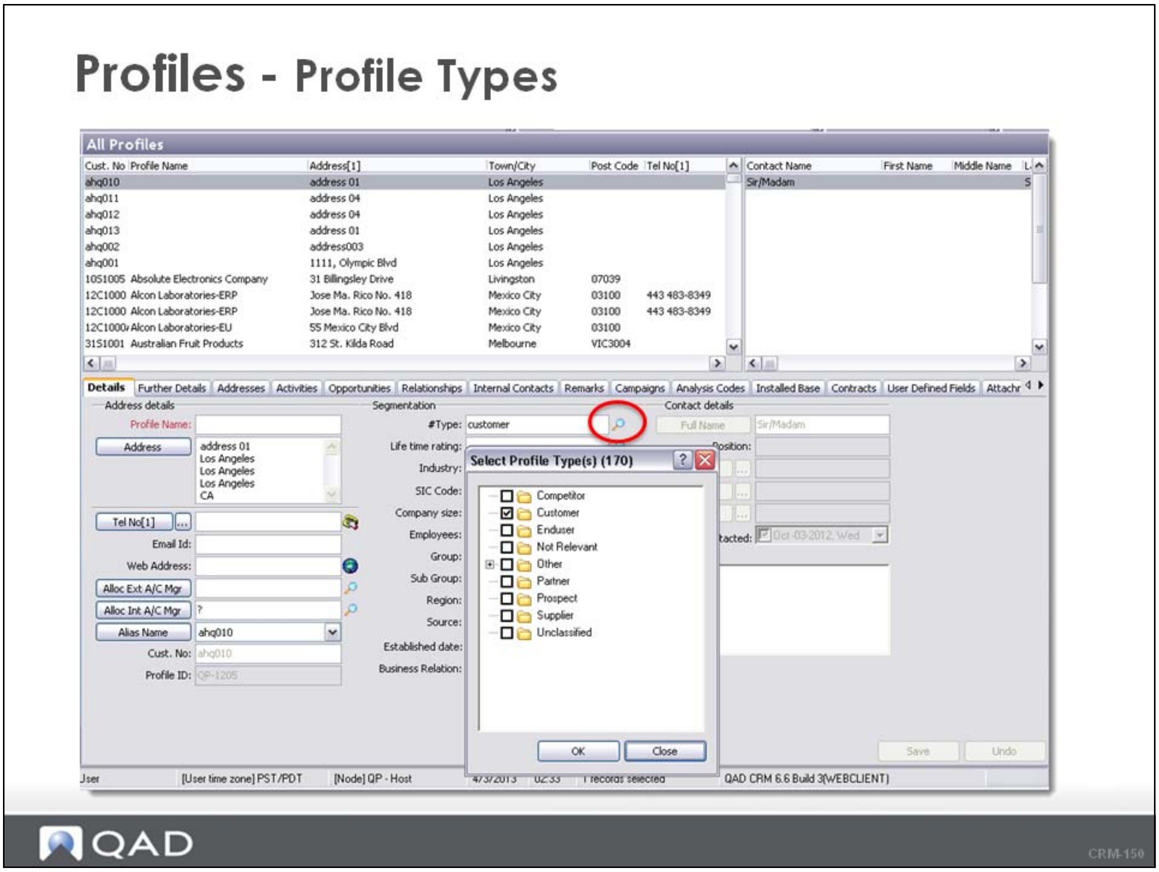
In this chapter, you gain an understanding of the Profile Record and how to manage your profiles effectively. The Profiles record forms the core of the QAD CRM system as all contact and opportunity information is associated with a Profile.

- Profiles either contain or are associated with all the information you need for a 360-degree view of your business relationship. The information includes 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.

Learning Objectives

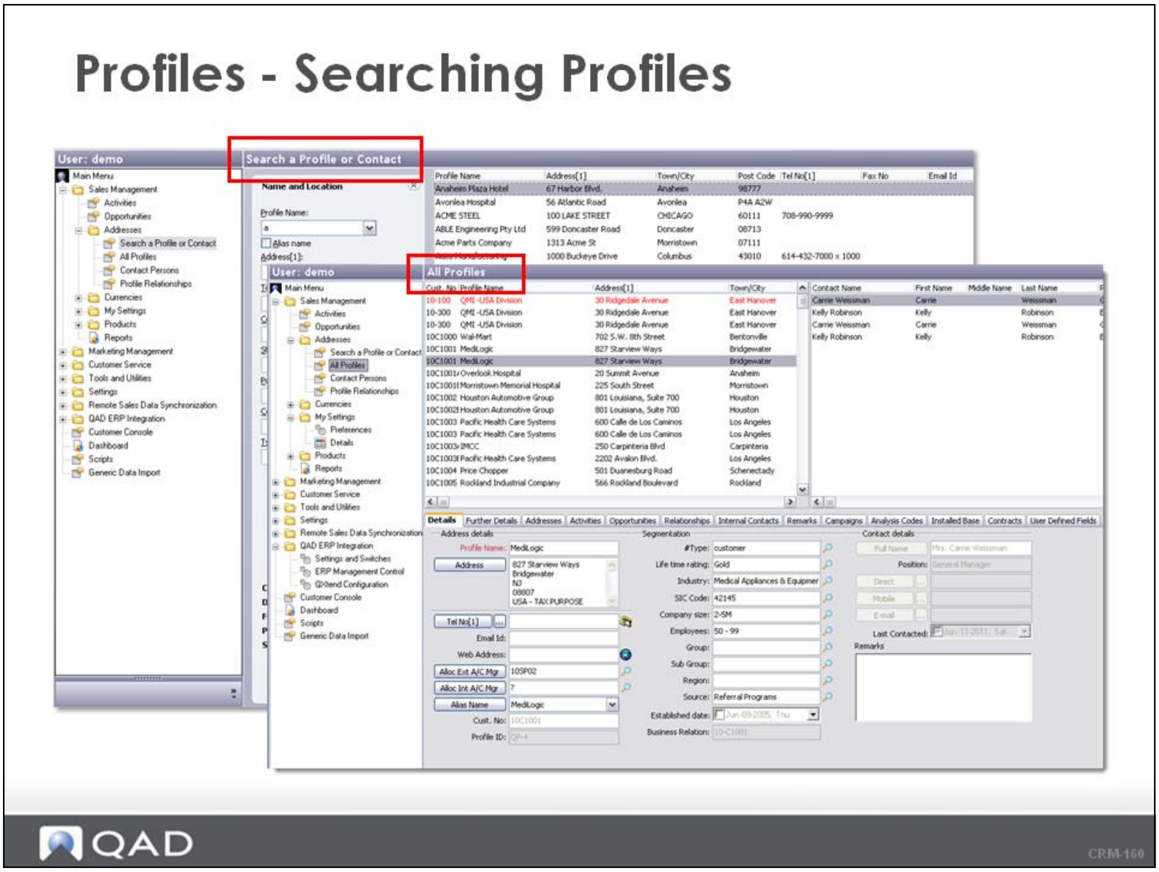
- Describe the Profile Record.
- List the data that is contained in a Profile.
- Search for a Profile
- Add a Profile

Profile Types



- 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.

Searching Profiles



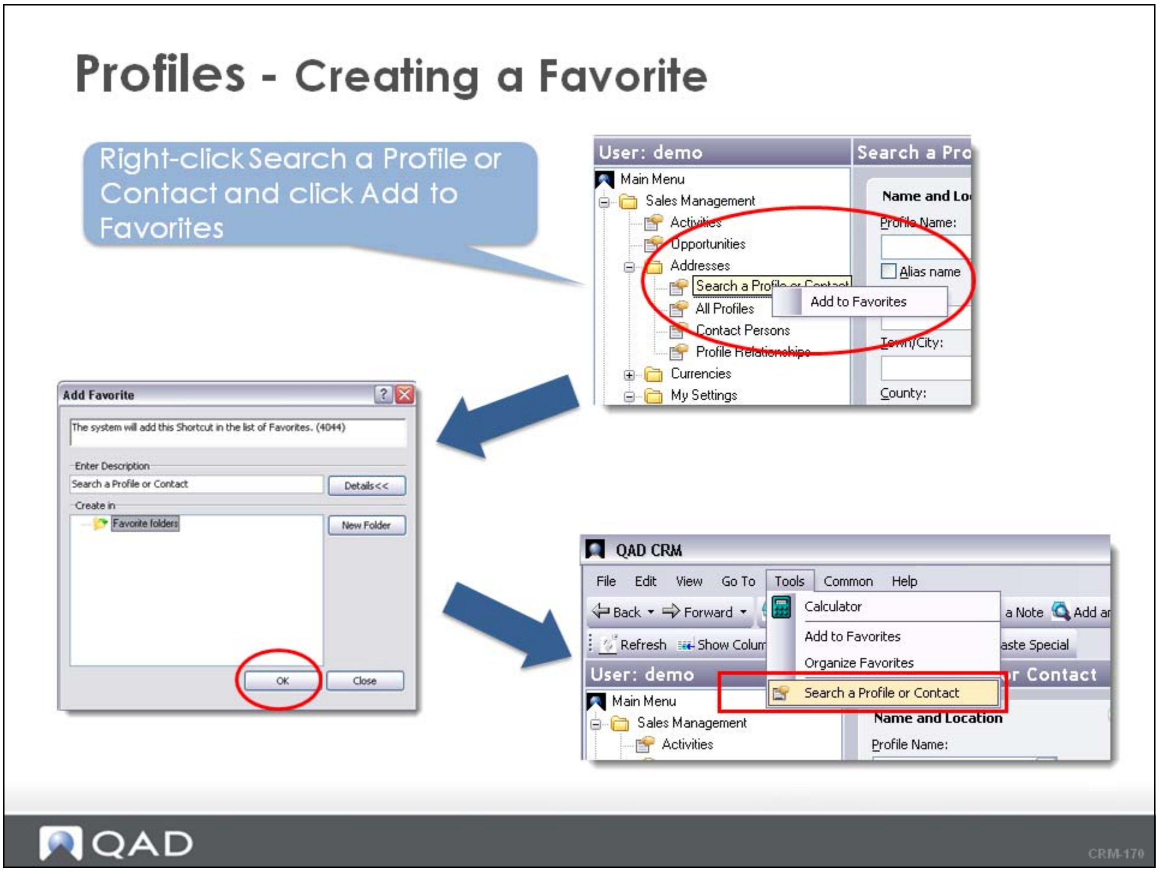
How many customers, prospects, suppliers, competitors, partners, or other business relationships are you tracking on QAD CRM? You can track an unlimited number of profiles, however, you need to access your profiles quickly and efficiently.

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 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.

Creating a Favorite



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

To create a favorite:

1 Navigate to CRM Menu|Sales Management|Addresses|Search a Profile or Contact.

2 Right-click Search a Profile or Contact and click Add to Favorites.

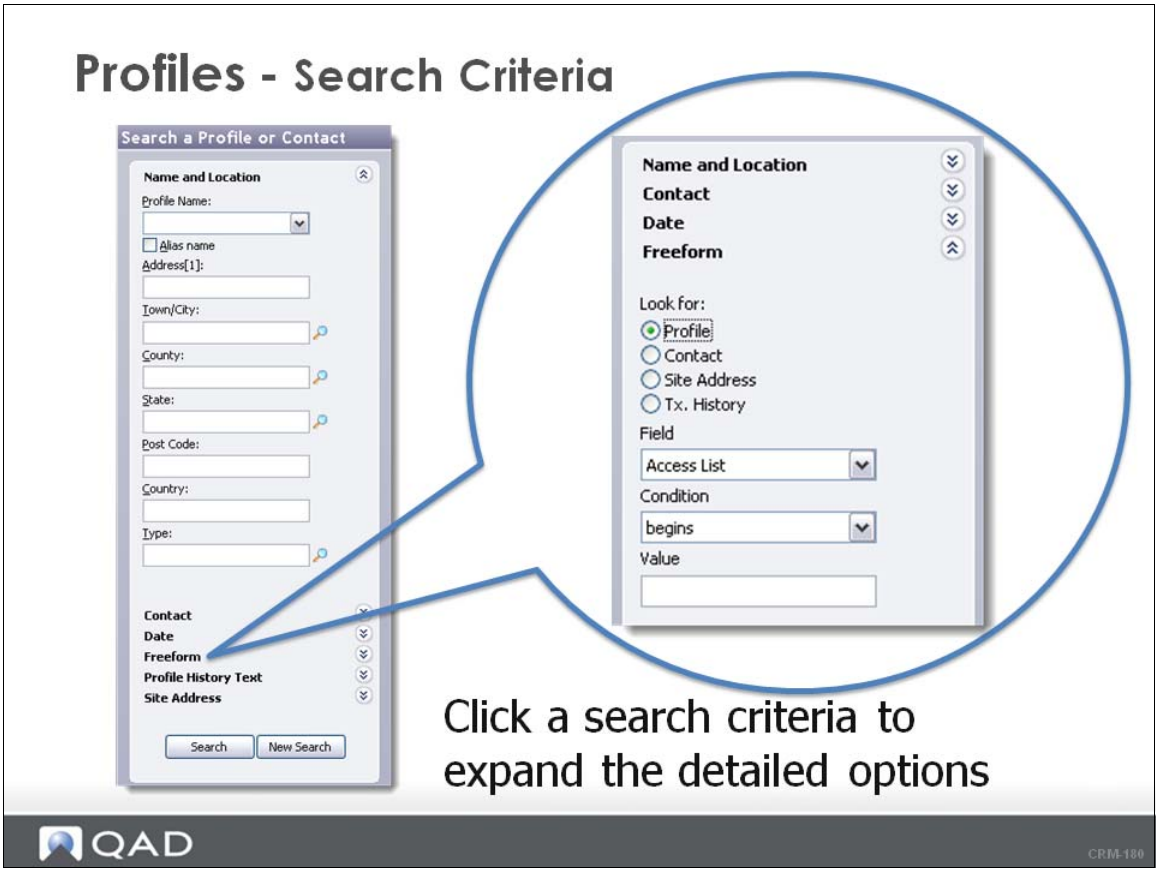
The Add Favorite dialogue box is displayed.

3 Click OK to save.

The Favorite displays:

- Under Tools in Application Menu Bar
- On QAD CRM Bar

Search Criteria

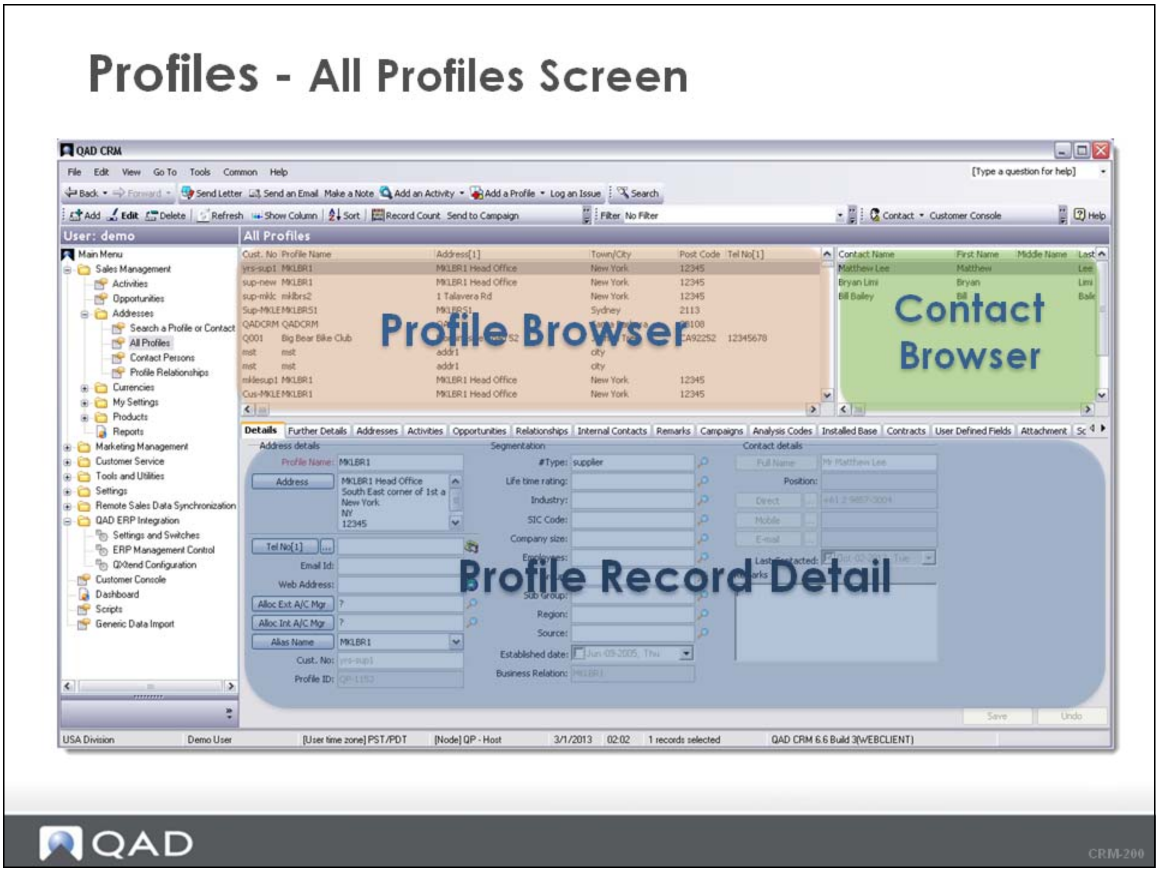


You can perform a search based on any of the available criterias. Click a Search Criteria to display the detailed options. The system searches based on information entered in the expanded or selected Search Criteria Tab. Information entered into other tabs is not taken into account.

Table 3.1
Search Criteria

Search Criteria	Search by
Name and 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. You 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

All Profiles Screen



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

Profile Browser

- Contains a list of Profiles based on the filter you select (see Filtering Profile Records).

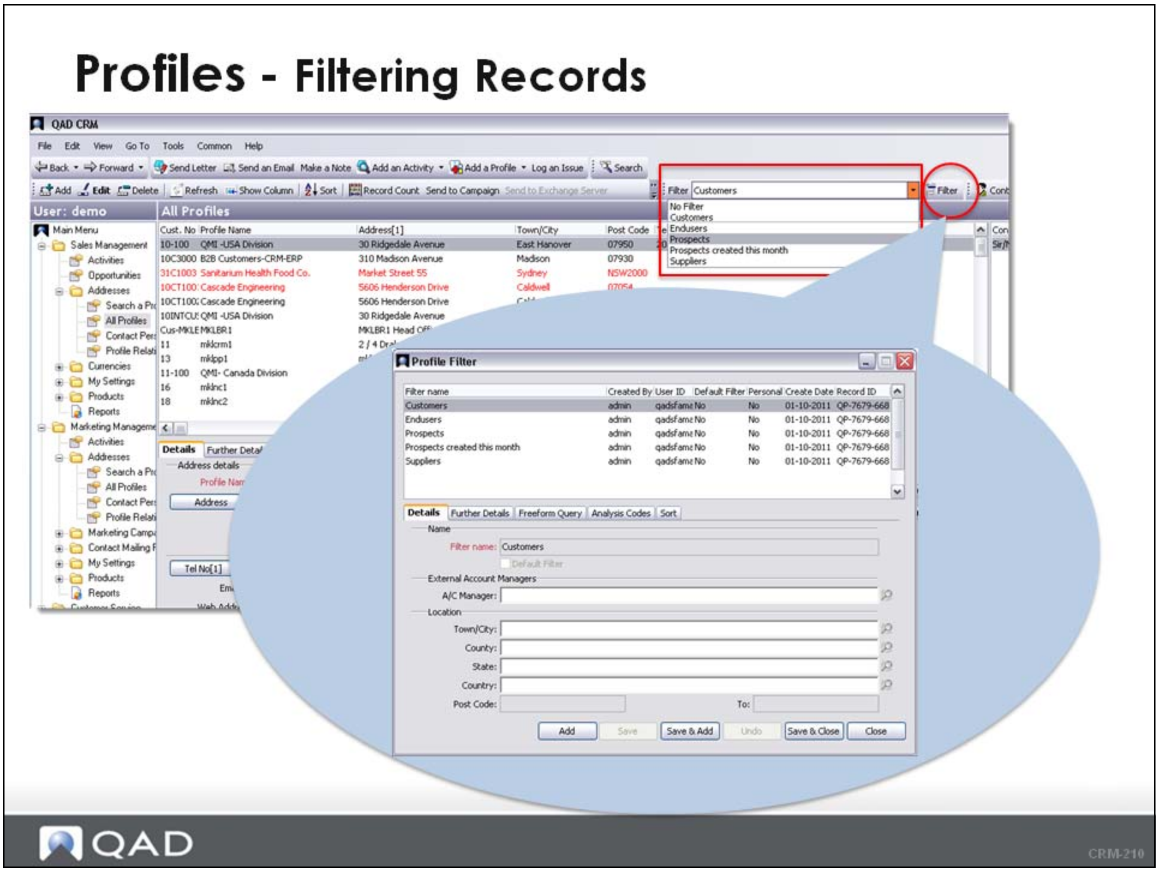
Contact Browser

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

Profile Record Detail

- Displays the details for the selected Profile in the Profile Browser in edit mode.

Filtering Profile Records



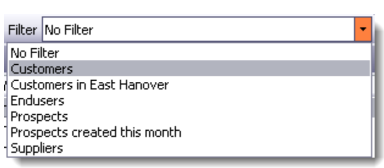
Using Profile Filter

By default, the All Profiles Screen displays all the profile records in the system. You can customize the display using the filters.

To filter the profile records:

1 Locate the Filter on the Application Toolbar.

2 Expand the filter list and select the filter you need.



Maintaining Filters

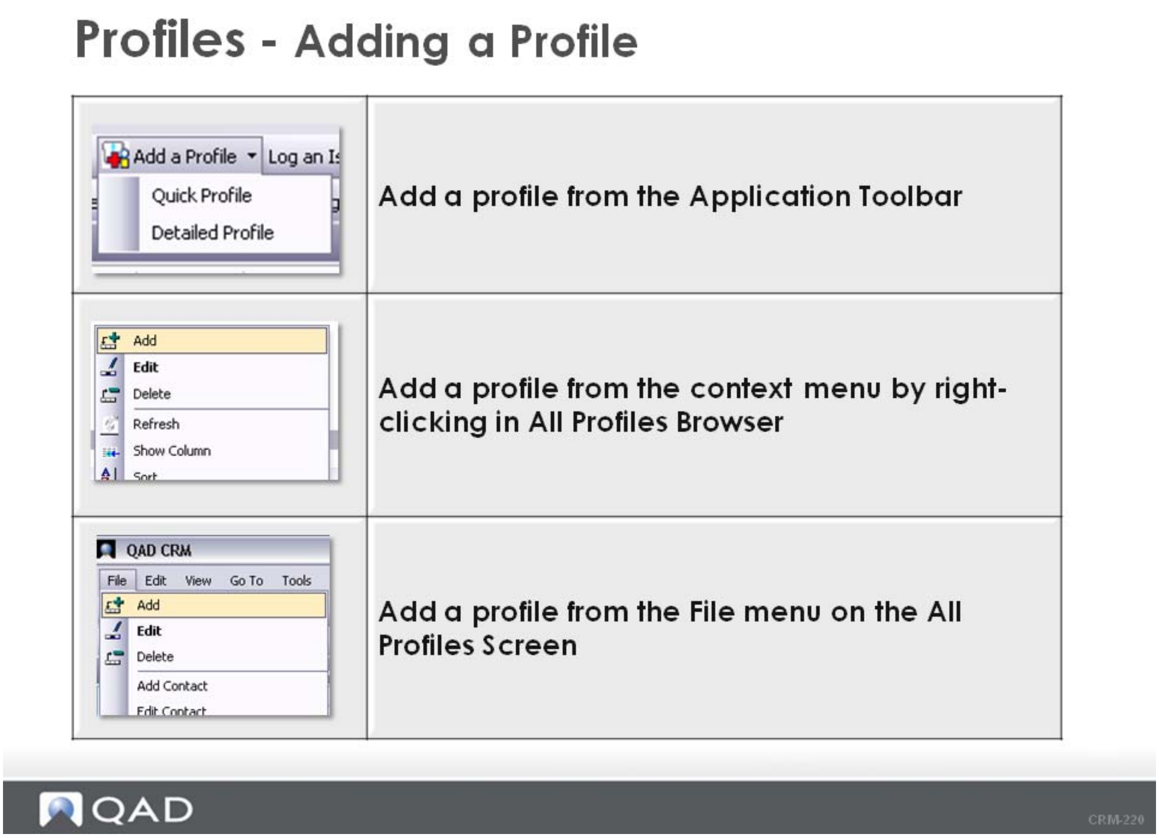
You can create and edit the filters as you need in the Profile Filter window.

1 Click the Filter icon (Filter) on the Application Toolbar.

The Profile Filter window displays.

2. Do one of the following:
   - To create a filter, Click Add and enter the filter name and other details.
   - To edit an existing filter, select a filter and change the details as you need on the bottom part of the Profile Filter window.
3. Click Save to save your changes and then click Close to close the window.

Adding a Profile



There are multiple ways to add a profile:

- The Add a Profile option on the Application Toolbar
    - Quick Profile: displays the Add Profile screen where you can record some basic details for a new profile.
    - Detailed Profile: displays the Profile Add Wizard.
- The Add option in the context menu on Profile Browser
- The Add option in the File menu

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.

Master Questions

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?)

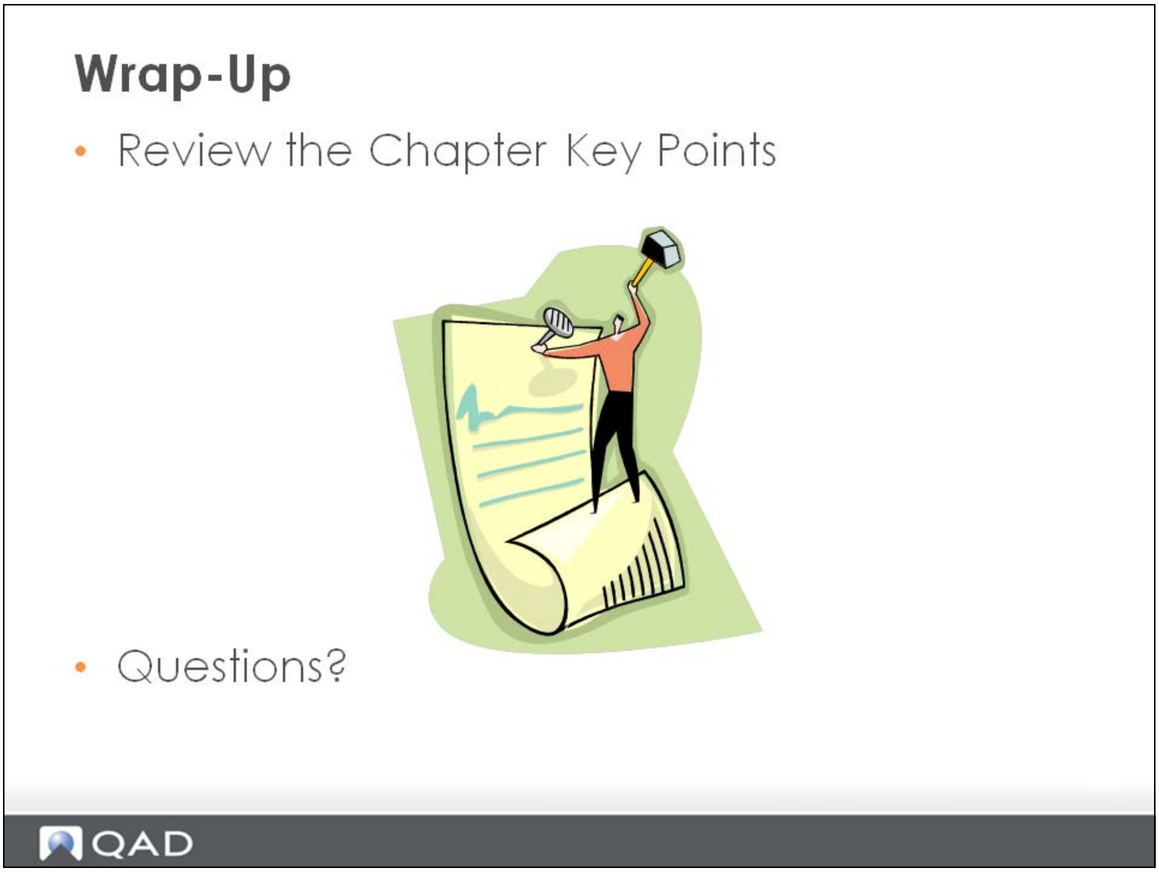
7 Favorites are created in two places: Application Tool Bar and the ___________________.

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 __________________.

Wrap-up



- The Profile Record is the center of QAD CRM. All data in QAD CRM is 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 gives you a duplicate Profile message when you try to add a Profile/Postal Code combination that 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.

Exercise

Task 1. Add Search a Profile or Contact Screen to your Favorite list.

1 Navigate to Sale Management|Addresses.

2 Right-click Search a Profile or Contact and choose Add to Favorites.

3 In the Add Favorite box, keep the default description and the default folder where the Favorite item is stored.

4 Click OK.

5 Check whether it appears on QAD CRM Bar and in the Tools menu on Application Menu Bar.

Task 2. Search for all customer profiles based in Sydney.

1 Use the Favorite you created in Task 1 to open the Search a Profile or Contact Screen.

2 Use the Name and Location search criteria to define your search options.

3 In the Town/City field, enter Sydney or use the look-up icon.

4 In the Type field, click the look-up icon and review the types and select Customer. Note that you could select more than one Profile Type.

5 Click the Search Button at the bottom of the Search Criteria Tab.

6 All Customer Profiles located in Sydney are returned to the workspace.

7 You can review the details of a specific profile by highlighting the profile**,** right-clicking, and choosing Profile from the context menu.

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

Task 3. Create a Profile Filter and use it as the default filter to display all profiles in the State of California.

1 Navigate to Sales Management|Addresses|All Profiles.

2 Go to View|Toolbars and check whether the Filter option is selected. If not, select it.

   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.

3 Click the Filter Drop-down list and set it to No Filter.

   The Profile Browser displays all Profiles.

   Notice that the Profiles are not sorted in any particular order. To sort by Profile Name, Click the Profile Name Label. The Profile Browser sorts all Profiles by Profile Name.

4 Click the Filter button to display the Profile Filter screen.

5 To create a Filter, click the Add Button in the lower right-hand corner of the screen.

6 Enter California in the Filter Name field.

7 Select the Default Filter Check Box to make it the default view of the All Profiles Screen.

8 In the State field, use the look-up icon to put CA-California, US into the Selected States column and click OK.

9 When you return to the Profile Filter Screen, Click Save & Close to close the screen and save your work.

10 The California Filter is triggered when you saved your work. The Profile Browser displays all Profiles from California.

Note To learn more about the Profile Filter Screen go to Help|Working with Profiles and Contacts|Filtering Profile Records.

Task 4. Create a Profile using the given 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

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 profile is not in QAD CRM. You are prompted to add a profile.

5 Click Yes.

6 Profile Add Wizard -Details Tab is displayed. The Profile Name field is auto filled based on your search criteria. 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, clicking the button opens 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 Manger = *Demo (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. Leave these tabs empty.

10 Save your new Profile by clicking OK.

11 Click Yes when you are prompted to send this new Profile to QAD ERP.

12 Click OK when QAD CRM notifies you that record is successfully transferred to QAD ERP. The Profile displays showing all associated tabs such as Campaigns, Opportunities, Installed Base, Contracts, and Script.

13 Review the new Profile. A Contact has been added with a Last Name = *Sir/Madam* as you did not 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.

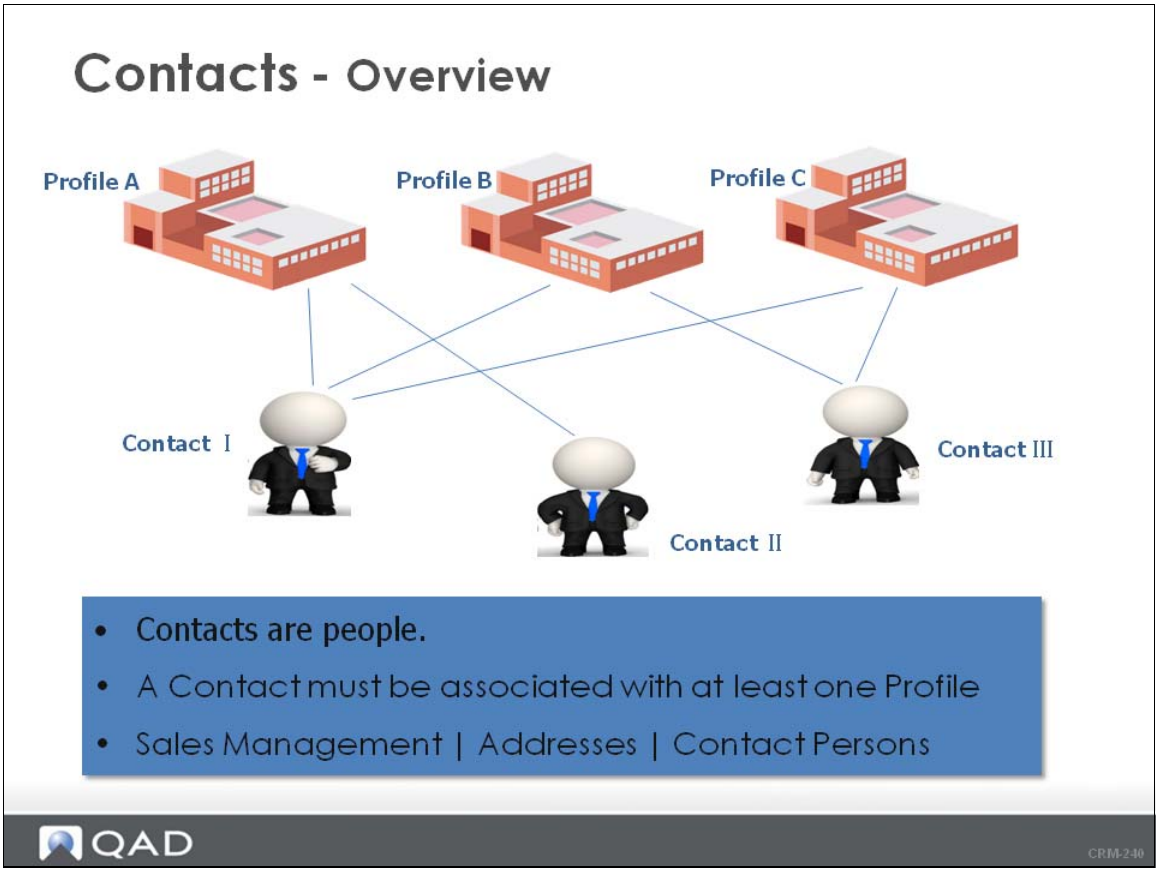
14 Click Close to close the window.

Chapter 4

Contacts

This chapter provides an overview of the contacts and information on setting up contacts.

Overview



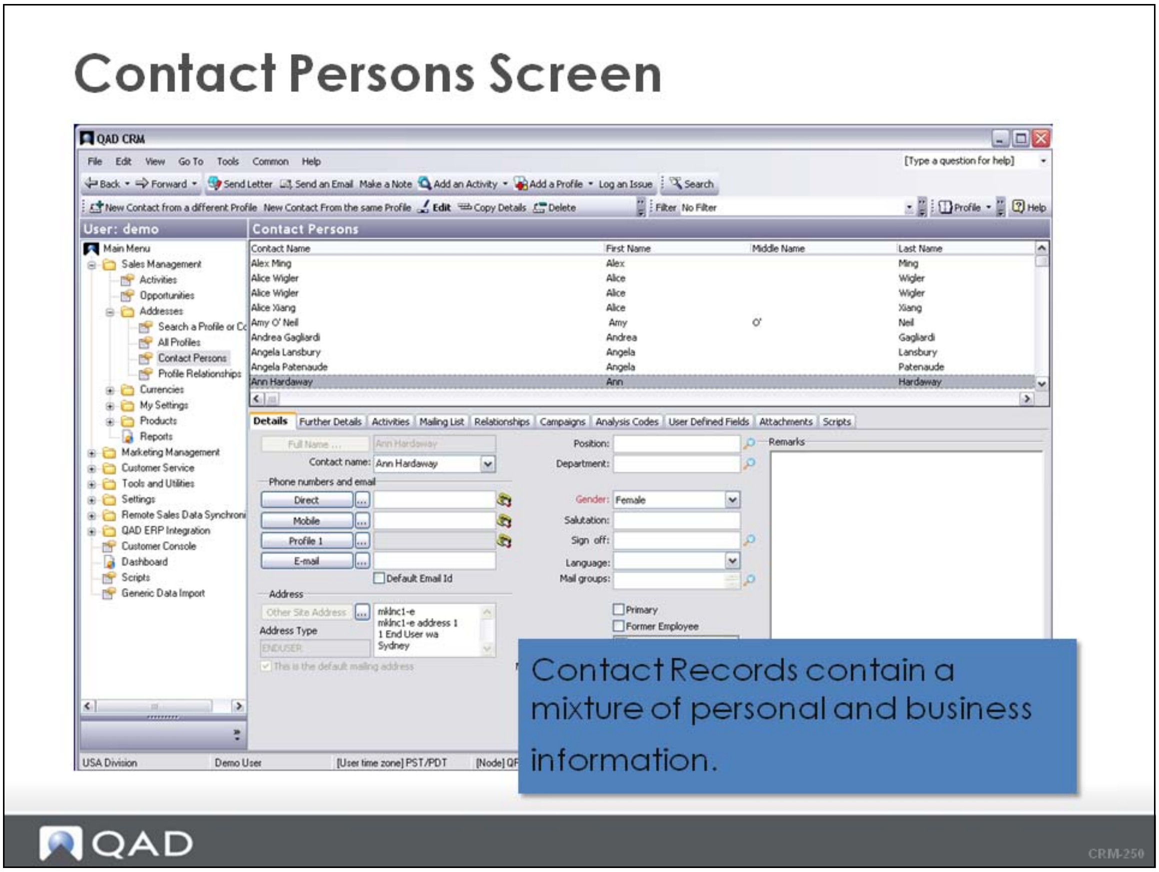
In this chapter, you gain an understanding of the Contact Record, how to manage your contacts effectively, and how the Contact and Profile Records work together. Contacts are people who work for or are associated with a Profile.

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
- Synchronize contacts with Microsoft Exchange Server

Contact Persons Screen



The Contact Persons submodule is designed for managing details of contact persons. Contact persons, or contacts, are people who work for profile organizations and with whom you communicate to conduct business-related activities. There can be more than one contact person specified for a profile organization. Also, one contact person can be associated with multiple profiles.

Pay attention to the following points on a Contact:

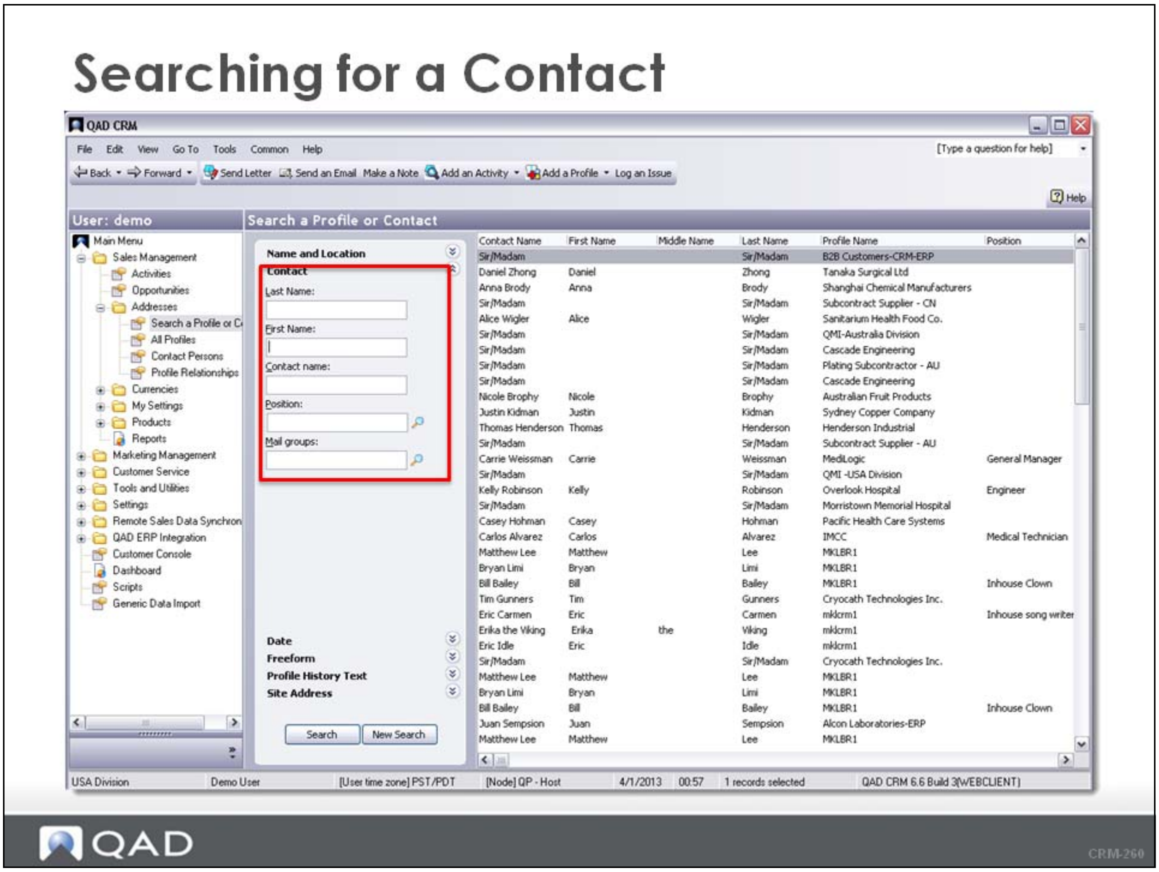
- A Contact is a person who is associated with one or more Profiles.
- It is important to remember that Contacts are people vs. organizations. Those business activities that need interaction with a person should be associated with a Profile and a Contact.
- Your organization maintains relationships with 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, Activities, Relationships, Campaigns, User-Defined Fields, Attachments, and Scripts.

Searching for a Contact

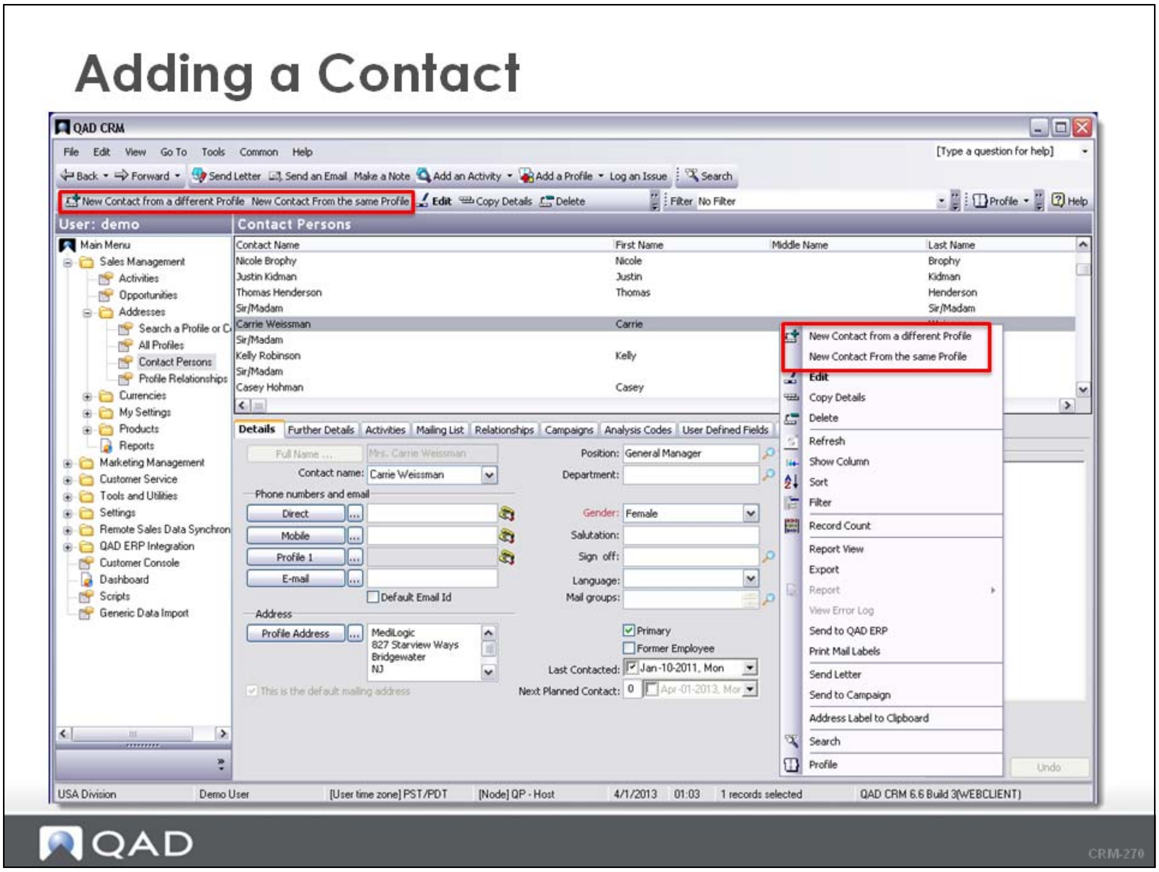


QAD CRM provides the same search facilities to help you locate specific Contact Records that you used earlier to search for Profile Records. You can search directly for the Contact Record or you can search for the Profile that the Contact is associated with. The two screens you use to locate your contacts 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 Profiles Screen from the Profile Chapter. Navigation in the Contact Persons Screen is similar to the All Profiles Screen.

Adding a Contact



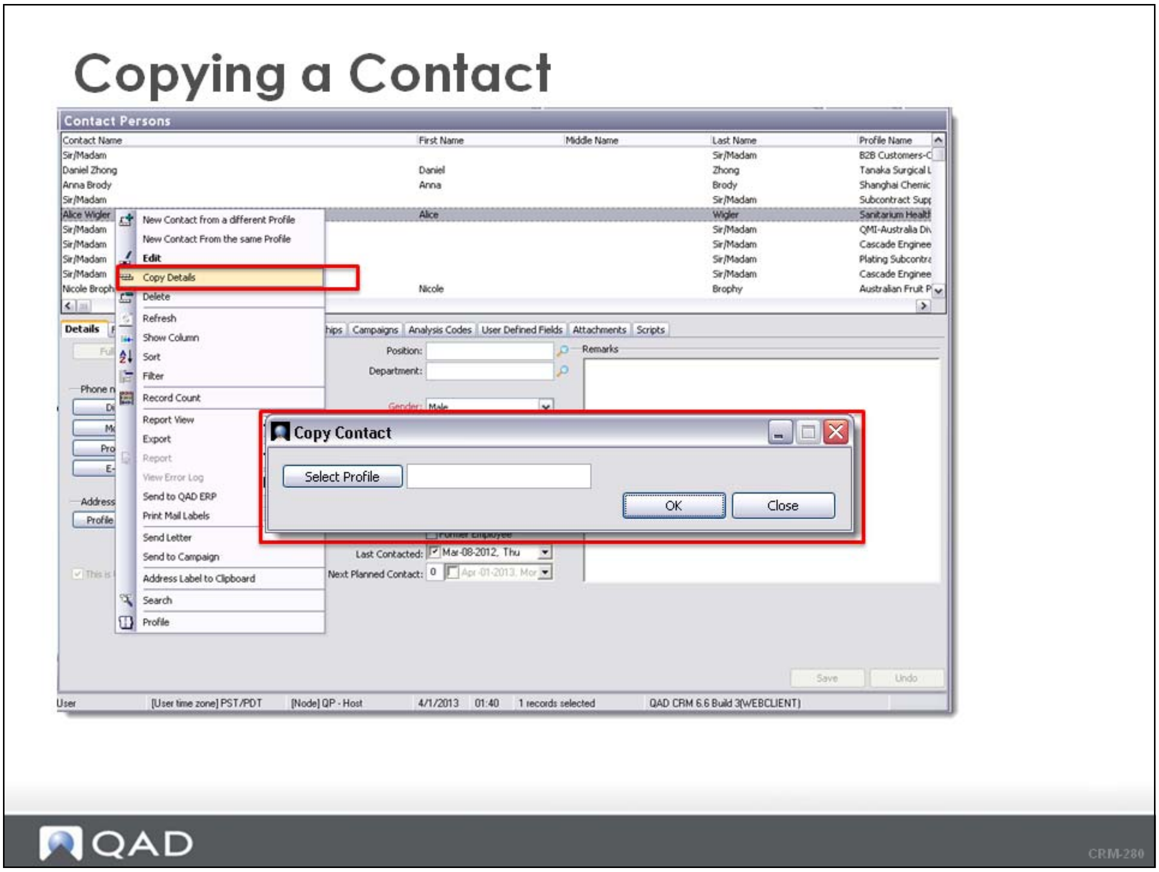
There are a number of ways to add a Contact to a Profile. Remember that a Contact is associated with a Profile. Typically, you would add a Contact at the time you add the Profile or you can update the Profile with additional Contacts later.

The slide displays adding a Contact by right-clicking in the Contact Browser from the Contact Persons 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.

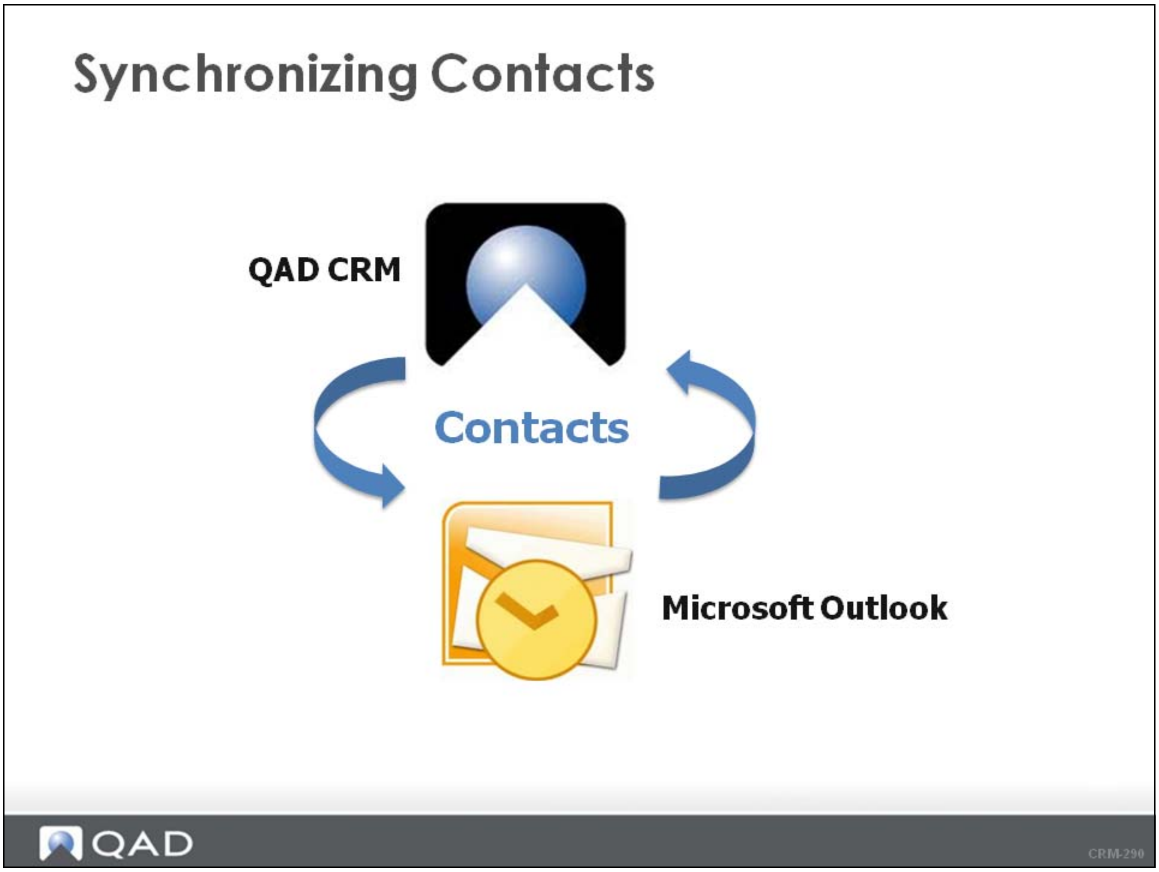
Copying a Contact



You can copy a contact record and associate it with another profile apart from the current one. This function is useful when most information for the existing contact and the new contact is the same.

1. Select the contact record and click the Copy Details button on the toolbar. Alternatively, select Copy Details from the File menu, or right-click and select Copy Details from the context menu. The Copy Contact pop-up displays.
2. Click the Select Profile button. The Find Profile/Contact window opens.
3. Search for the profile with which you want to associate the new contact record you are creating, and click OK. This operation attaches the contact record to the selected profile.

Synchronizing Contacts



You can synchronize the contacts with Microsoft Outlook in QAD CRM if the Exchange Server settings are properly configured and you are authorized by the system administrator.

The contacts information can be synchronized in bi-directional manner either manually or automatically depending on the synchronization policies.

Synchronizing Microsoft Outlook contacts to QAD CRM

If the Transfer Mode is set to Automatic, the contacts created in QAD CRM are automatically transferred to the Microsoft Outlook contact list after synchronization. If the Transfer Mode is set to Manual, manually send the contacts to the exchange server.

To manually synchronize contacts:

1. Select the contacts to synchronize in the Contact Persons window.

   Note You can use the Contact Filter to filter out all the contact that you want to synchronize.

2. Right-click the selected contacts and choose Send to Exchange Server from the menu.

   The contacts will be transferred to Microsoft Outlook until the next synchronization is performed.

Synchronizing Microsoft Outlook contacts to QAD CRM

If your system is configured to synchronize data categorized as QADCRM, create a QADCRM category first.

To synchronize contacts:

1. Create a contact or select an existing contact in Microsoft Outlook.
2. Categorize the contact as QADCRM. It depends on the system settings by the system administrator.
3. Save the contact.

   The contacts will be synchronized to QAD CRM until the next synchronization is performed.

Master Questions

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 fields with field descriptions, and the Contact Tab where they are displayed:

Example: Field: Source, Description: Where did we hear about this Contact? Tab: Further Details

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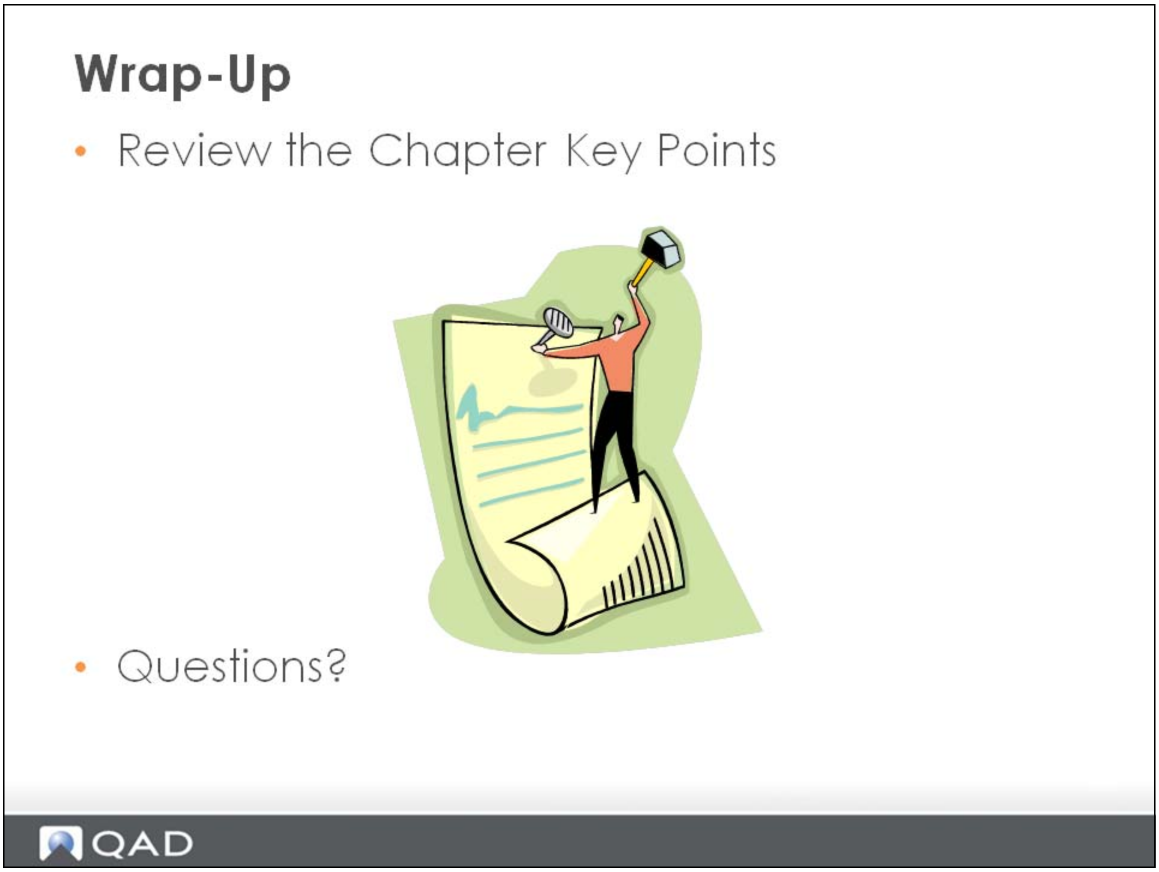
5 Last Name, First Name, Contact Name, Position, and Mail Groups are all Search Fields on the Search for Profile or Contact Screen (True or False?).

Wrap-Up



- 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, such as Contact Records and Profile Records. It is important in tracking earlier relationships with a Contact.

Exercise

Task 1. Search for the contact record of Justin Kidman.

1. Navigate to the Search a Profile or Contact Screen.
2. Expand the Contact criteria.
3. Enter Kidman in the Last Name Field.
4. Click the Search Button.

   The Contact Record for Justin Kidman displays.
5. To open the contact, right-click the record and choose Contact from the context menu.

   The contact details for Justin Kidman are displayed.

Note If you choose the Profile option from the context menu, the related Profile would open. You can also see the contact details by double-clicking the contact record of Justin Kidman.

Task 2. Try the following alternative to search for the contact record of Justin Kidman.

1. Open the Contact Persons Screen and ensure that there are no active filters.
2. Click the Search button on the Application Menu Bar.

   A Search Bar appears on the top of the Contact Browser.
3. Select or enter the following values and click Search Now:
   - Search field = Contact Name
   - Condition field = begins
   - Value = J

   All contact records with the contact name started with J are displayed.
4. Scroll the list to find the record of Justin Kidman.
5. Select the record of Justin Kidman.

   The details are displayed in edit mode.

Note You can also use the Search button to search for data records in any browser where the button is available.

Task 3. Use the following scenario to add a contact to an existing profile.

While visiting the Heron Surgical Supply, your main contact, Donald Schneider, introduces you to the manager Mark Flynn. Add Mark as a Contact associated with the Heron Surgical Supply. There are a number of ways to do so. Let us add the new Contact from the All Profiles Screen.

1. Search first to see if Mark Flynn exists.
2. Display Heron Surgical Supply in the All Profiles Screen.
3. Right-click in the Contact Browser and choose Add Contact from the context menu.
4. The Contact Details window displays. The Profile Address field is pre-filled.

5 Add the email address and phone (use your own email address and phone number). 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 Now we have enough information to indicate that Donald Schneider reports to Mark Flynn. Right-click Donald Schneider 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.

Task 4. Copy the Mark Flynn to the profile of Boulder Industries that you created in the exercise of Profiles.

1 Go to the Contact Persons Screen and locate the record of Mark Flynn.

2 Select Mark Flynn and click Copy Details button on the Application Toolbar.

3 On the Copy Contact box, click Select Profile button.

The Find Profile/Contact screen appears.

4 Enter Boulder Industries in the Profile Name field and click Search.

5 Select Boulder Industries and click OK.

6 On the Copy Contact box, click OK.

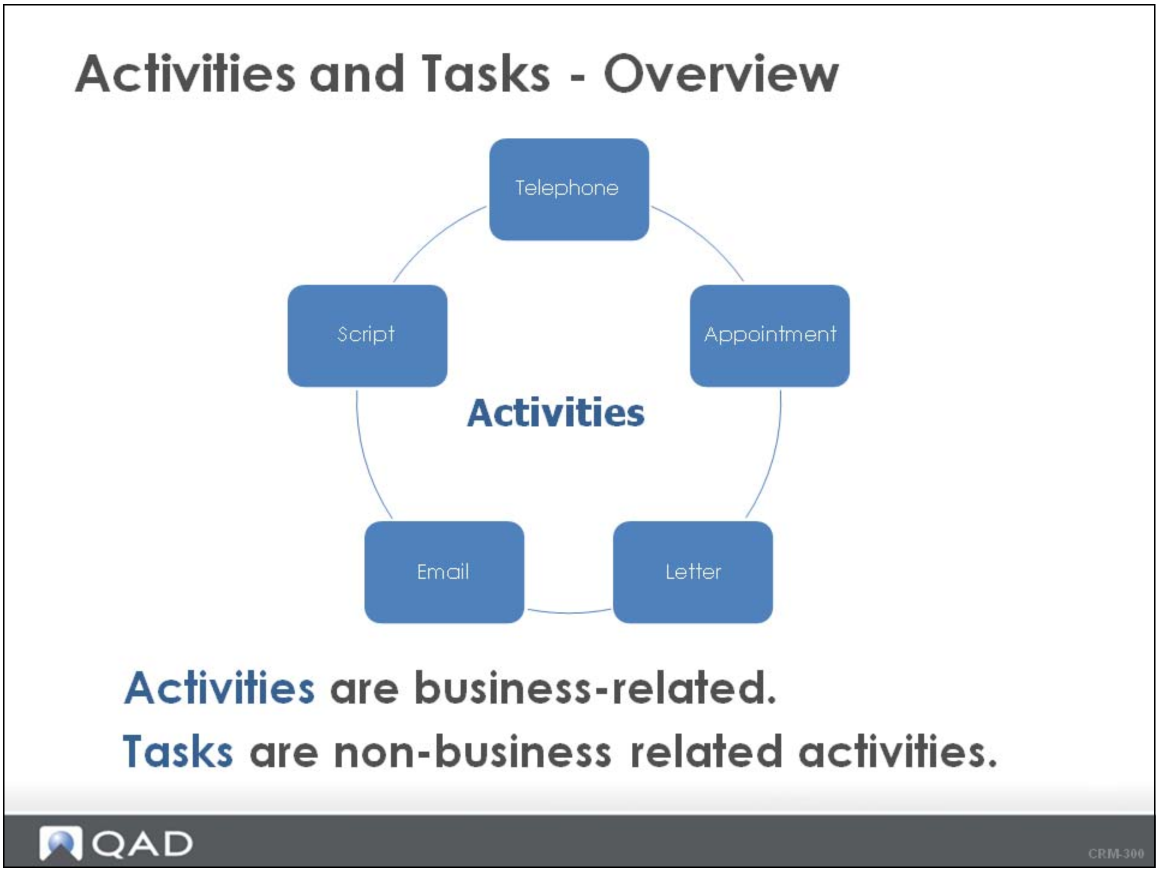
7 Go to All Profiles screen and check if the record of Mark Flynn is associated with Boulder Industries.

Chapter 5

Activities

This chapter provides an overview of managing activities. It then covers the management of business-related Activities, Tasks, Emails, and Letters.

Overview



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.

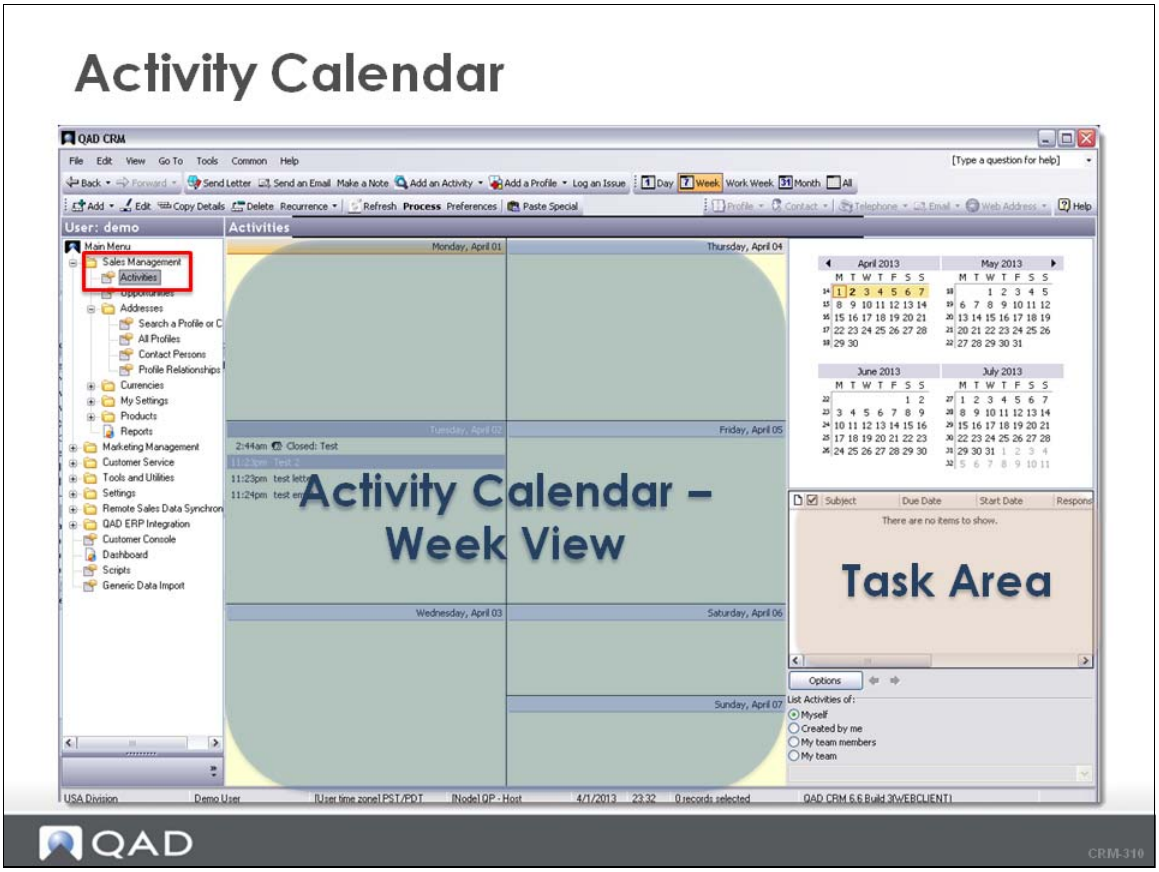
The QAD Customer Relationship Management (QAD CRM) Application describes Activities as business-related activities and Tasks as “to-do’s” that you can assign to yourself or others. You can schedule both for a particular date, but Activities such as Appointment and Telephone also have due time. Tasks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

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.
- Synchronize Activities and Tasks
- Describe a Contact Note.
- Explain how to send Email.
- Synchronize Emails.
- Explain how to send a Letter.

Activity Calendar



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.

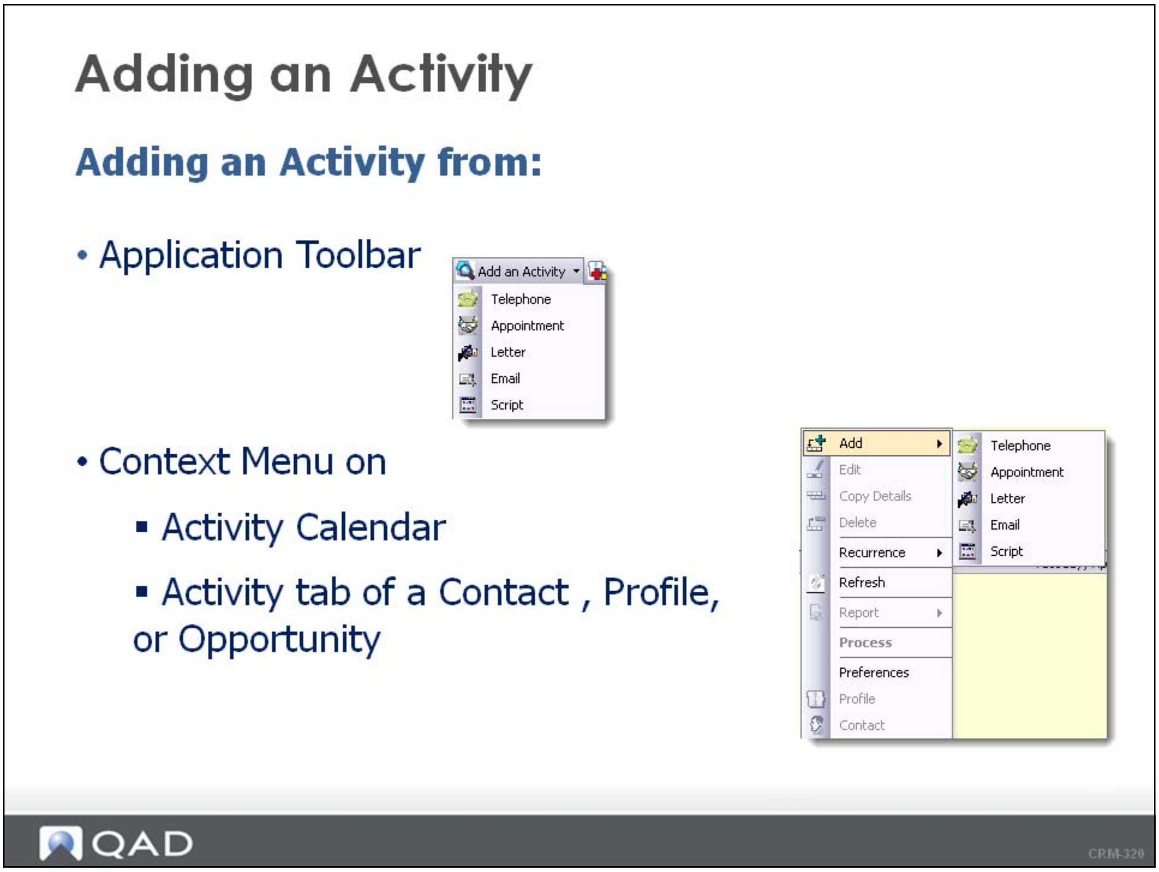
The Task Area is not displayed in the All View. The All View displays all activity records, irrespective of the day, week, and month in a list that can be filtered as there can be a great many records.

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. 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 Microsoft Outlook. Integration with Lotus Notes is scheduled for a future release.

Adding Activities



There are many ways to add an activity including:

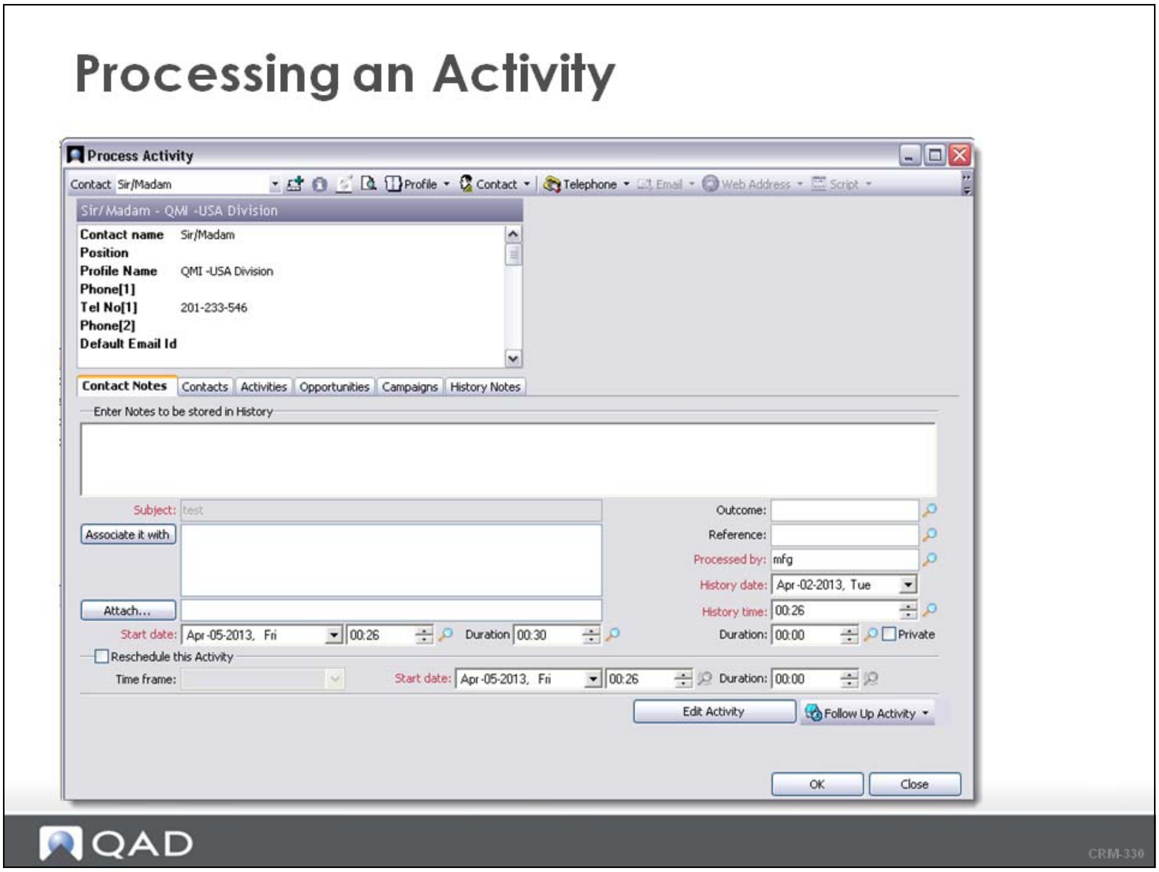
- Right-click in the Activity Tab Window from the Profile, Contact, or Opportunity Records.
- Right-click in the Calendar from the Activity Module.
- Use the Add an Activity from the QAD CRM Toolbar.

The Activity Type Dropdown displays 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.

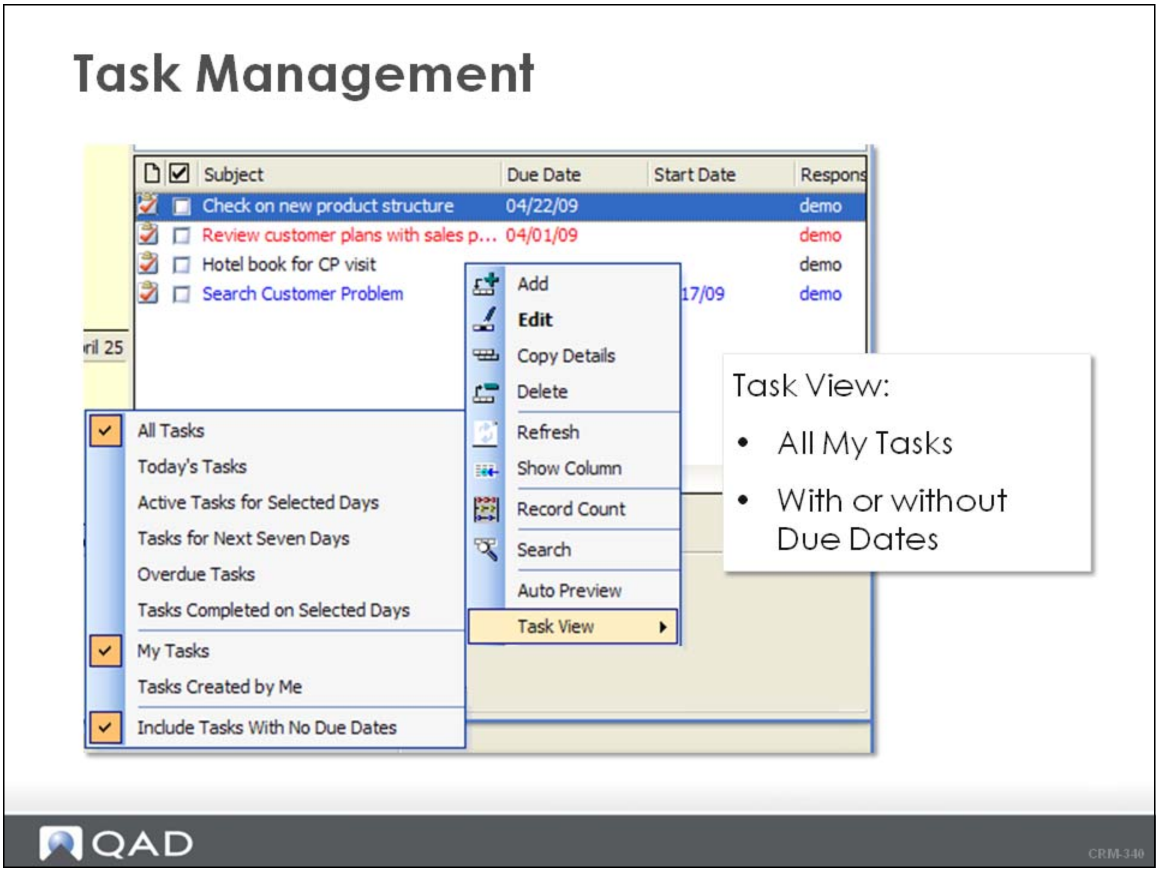
Note We discuss Scripts in a later chapter.

Processing an Activity



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.

Task Management



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 you created by selecting the correct Task View.

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

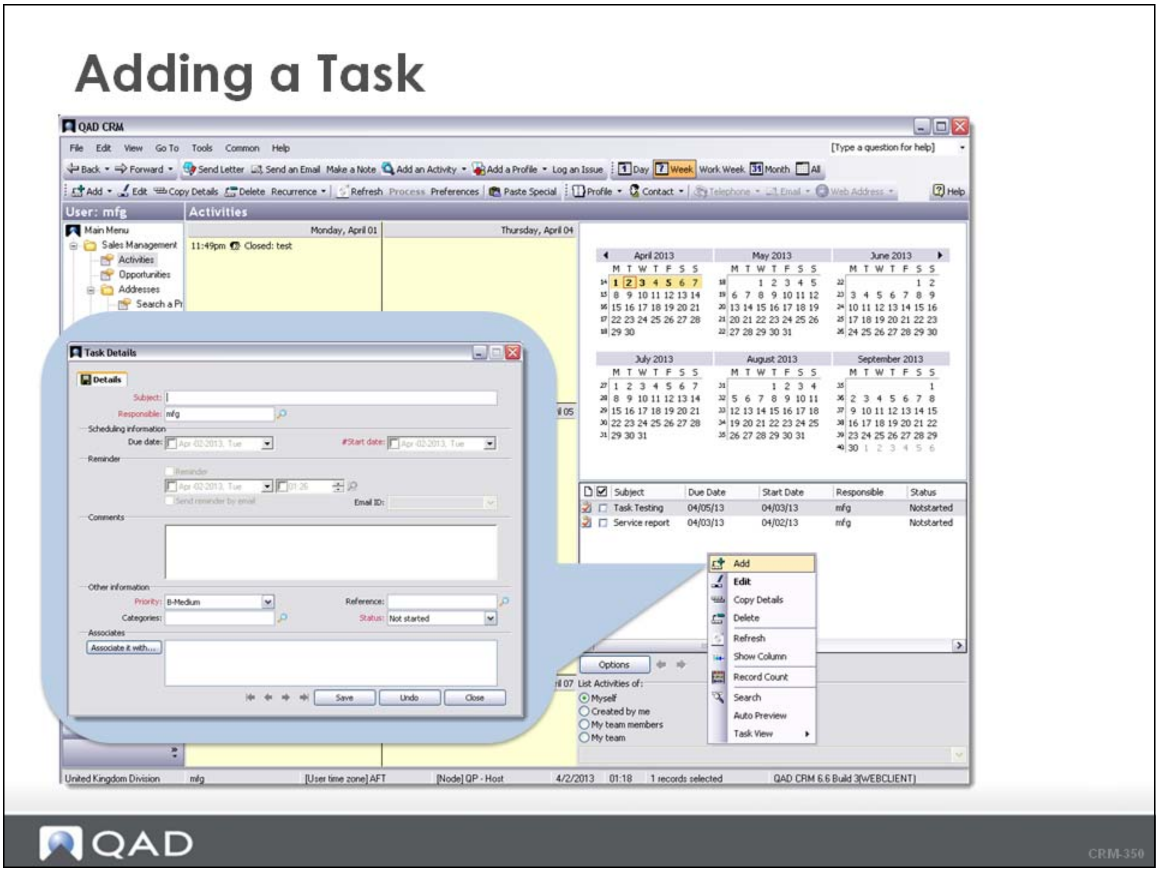
You can select the number of Tasks you want to display using the Options button available just below the Tasks area in the workspace.

You close a Task by selecting the check box 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 you can use it if your production environment is integrated with Microsoft Outlook.

Adding a Task

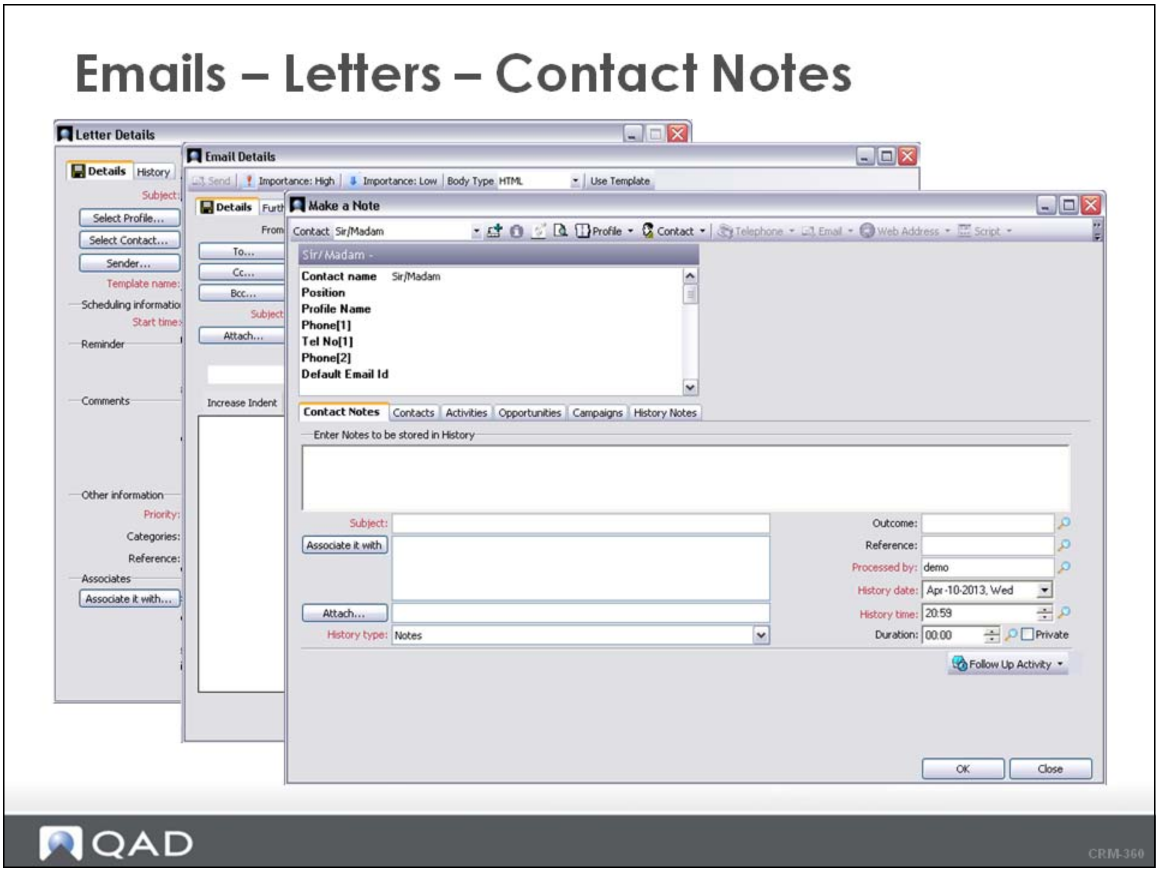


To add a task:

1. Open the Activities Screen.
2. Right-click in the Task Area and choose Add from the context menu.

   The Task Details window displays.
3. Enter the task information. You can add associated profiles, contacts, or events using the Associate with button.
4. Click Save and then close the window.

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.

Sending Email from QAD CRM

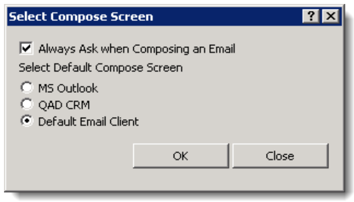
You can compose and send emails in QAD CRM system when the Exchange Server is enabled and the email preferences are configured properly in your system.

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

To send email from QAD CRM:

1 Do any of the following:
   - Click the Send Email button on the toolbar.
   - Choose Email from the Add an Activity drop-down list.

2 If the Select Compose Screen pops up, select your email client and click OK.



3 Compose and send your email.

Either you use QAD CRM or MS Outlook as an email composer, you can choose a pre-defined template to compose your email.

Synchronizing Emails

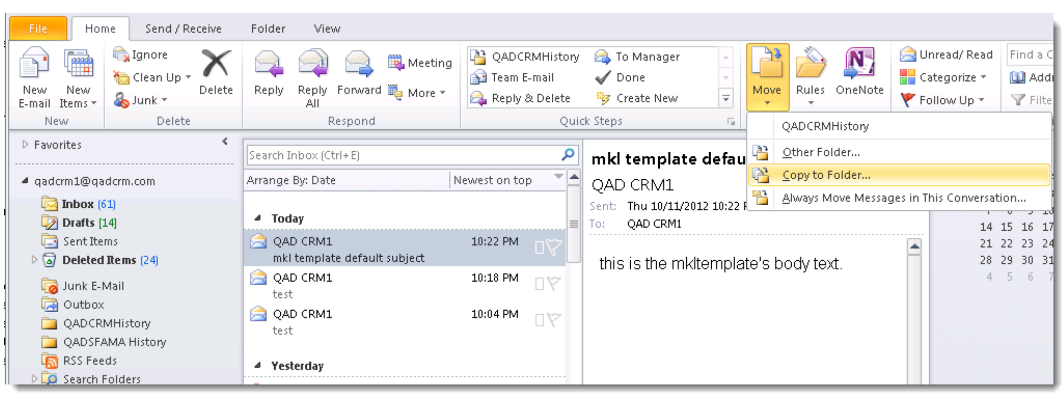
You can synchronize emails in QAD CRM system if the integration with exchange server is enabled by the system administrator. The synchronization could be performed in either of the two ways:

- Automatically. If the automatic email synchronization is enabled, the emails will be synchronized automatically when the Admin Service checks for new emails.

  Note The emails from Microsoft Outlook are reconciled by the email address in QAD CRM. If the email address matches that of a contact in QAD CRM, the email details are created as a history record in QAD CRM against that profile and contact.

- Manually. If the automatic email synchronization is not enabled, you need to do it manually.

  If you use Microsoft Outlook and Outlook Access, copy the email from a CRM contact to the QAD CRM History folder using the Copy to Folder option. The email will be brought into QAD CRM when the Admin Service checks for new emails.



You can also synchronize an email from any mobile clients by forwarding the email from a CRM contact to the QAD Mail Room Address. In the Subject filed of the forwarded email, include the email address of the original email sender and the original subject. Use a pipe character (|) to separate the email address and the subject.

Example

Original Subject: Re: Quotation

Subject in the forwarded email: username@company.com| Re: Quotation

Note You can get QAD Mail Room Address at the Emails tab in Settings|Mail Server Integration|Settings and Switches.

Sending 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 generated only when they are processed based on their scheduled dates.

Making 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 Online Help or the QAD Customer Relationship User Guide for more information on Notes.

Synchronizing Activities

Appointments and tasks can be synchronized between QAD CRM and Microsoft Outlook in both directions depending on the synchronizing policies by the system administrator.

To create an activity (appointment, meeting, or task) in Microsoft Outlook and synchronize it to QAD CRM:

1. In Microsoft Outlook, create an activity (appointment or task) as you normally do in Outlook.
2. Categorize the activity as QADCRM. It depends on the system settings by the system administrator.
3. The activity will be synchronized to QAD CRM the next time the activity synchronization job is run.

Note You can view the job status in the AdminService job history in QAD CRM.

Managing Customer Visit Reports

You can compose and submit visit reports from any email client and do not need to log on to the QAD CRM system.

To submit a report using email:

1. From your email client, create an email.
2. In the recipient field, enter the QAD CRM Mail Room Address.

   The system administrator maintains QAD CRM Mail Room Address on the Email tab in Settings|Mail Server Integration|Settings And Switches.
3. Include the title of your report followed by the email address of the contact who you visited. Use a hyphen to connect the title and the email address.

   Example Subject: Customer Visit Report - username@company.com
4. In the email body, compose your report content.
5. Send the email when you finish.

When the email is sent, the visit report details will be attached to the Profile. The authorized users can access the report details from the Activities tab in the All Profiles module.

Master Questions

1 How do you add a Task?

- **a** Right-click in the Task Area located in the CRM Calendar.
- **b** Select a Profile and right-click the Profile.
- **c** All of the above.

2 List two types of Activities that appear on your Calendar.

____

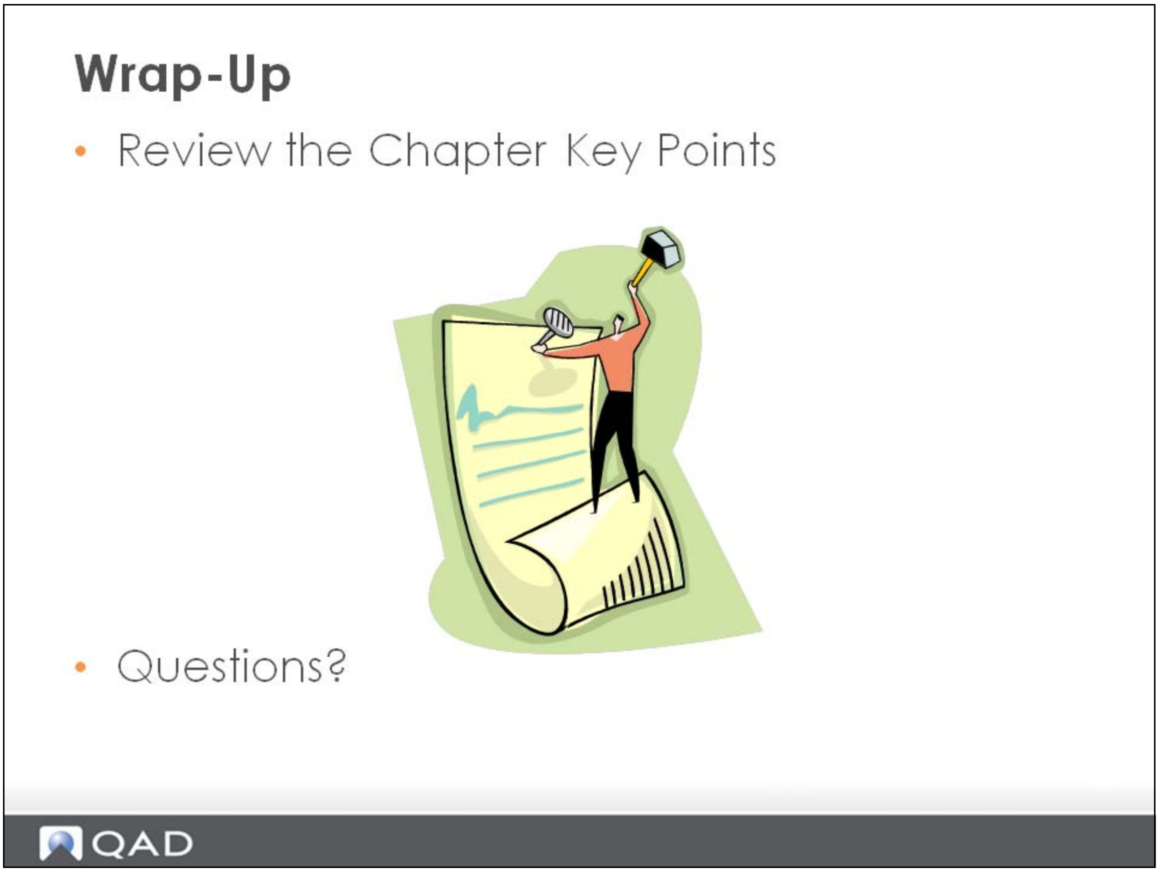
____

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?)

Wrap-Up



- 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 Microsoft 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.

Exercise

Task 1. Use the following scenario to review your knowledge on how to handle activities and tasks.

Your customer Donald Schneider at Heron Surgical Supply would like a demonstration of the new product line. Donald is free next Tuesday from 1:00 p.m. until 3:00 p.m.. Create an appointment and invite your colleague Tim Michaels to attend.

1 Navigate to the Heron Surgical Supply Profile and select the Activity Tab.

2 Right-click in the Activities Tab and select Add |Appointment.

   The Appointment Screen opens to the Appointment Detail Tab.

3 Enter a subject for the appointment.

   The Profile, Contact, and Responsible fields are filled. The Contact field contains the default contact - Donald Schneider. If you wanted another contact, click Select Contact button.

4 Although the Location Field has a drop-down list associated with it, you can also type in a value. Type in Heron Surgical Supply.

5 Set the scheduling information for this appointment as given in the scenario.

6 Organizer and Priority are filled in. If necessary, you can also change them.

7 Add the Categories of Key Customer and Strategies for reporting purposes.

8 You could mark this appointment a Private Meeting by selecting the Private checkbox, but for this meeting that would not be appropriate.

9 Click the Further Details Tab and add Tim Michaels to the attendee list.

10 Click Associate it with button and select Electronic Services Ltd as its associate.

11 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.

12 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).

13 Right-click the Appointment in the All View and choose edit to change the priority to A-High.

14 Save your work. Notice that the Appointment changes color to blue based on its priority.

Task 2. Use the following scenario to process the appointment activity.

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

1 Navigate to the Appointment and double-Click to open.

2 Update the Contact Notes and Outcome. Then, select Follow-up Activity to create another demo.

3 Edit the appointment information and save it.

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 takes you to the Process Activity Screen.

Task 2. Use the following scenario to create and manage a task.

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 checkbox)*
   - Comments = *New Feature - Customer List*
   - Priority = *Change to A-High*
   - Status = *Change to Open*
   - Associate it With = *Heron Surgical Supply*

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

Chapter 6

Opportunities

This chapter provides an overview of opportunities and how to manage your business opportunities using QAD CRM

Overview

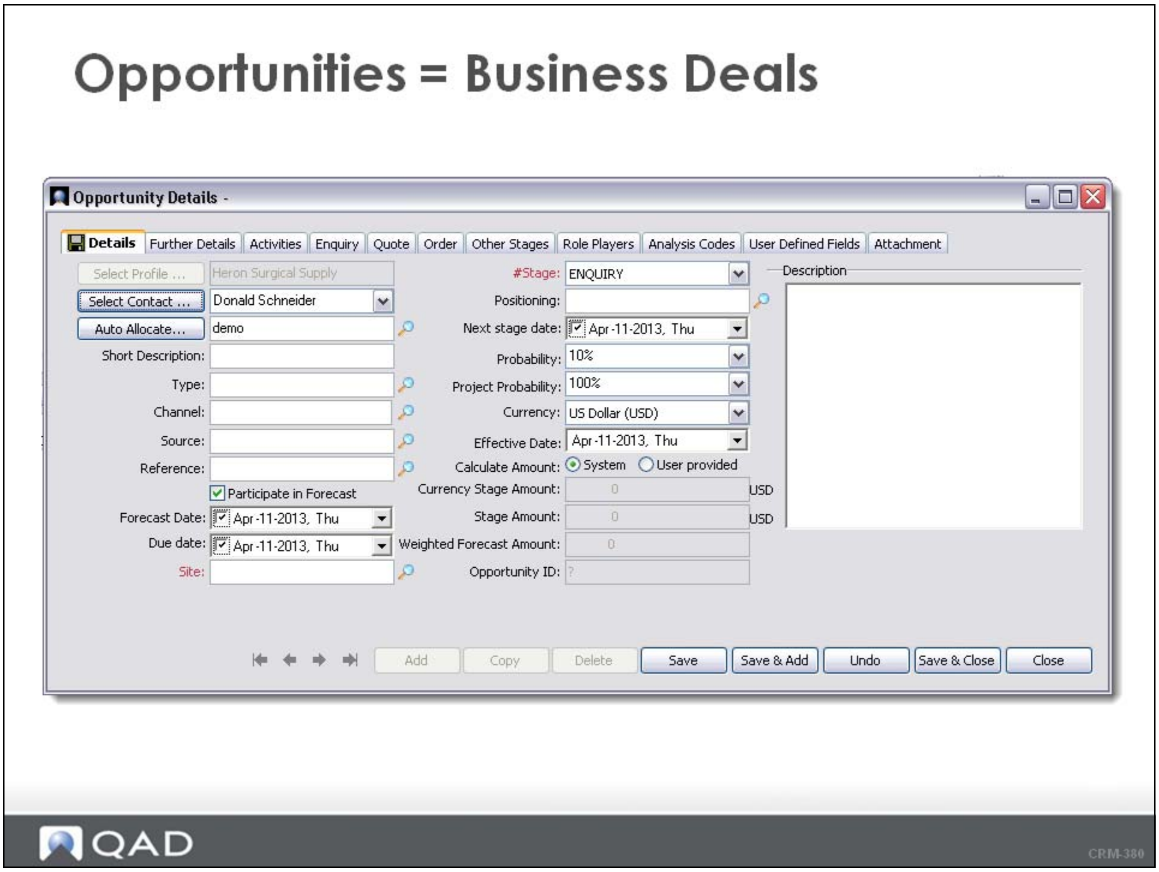
In this chapter, you learn how to manage your business opportunities using QAD CRM. Opportunities begin as business leads generated by your sales organization and marketing department.

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

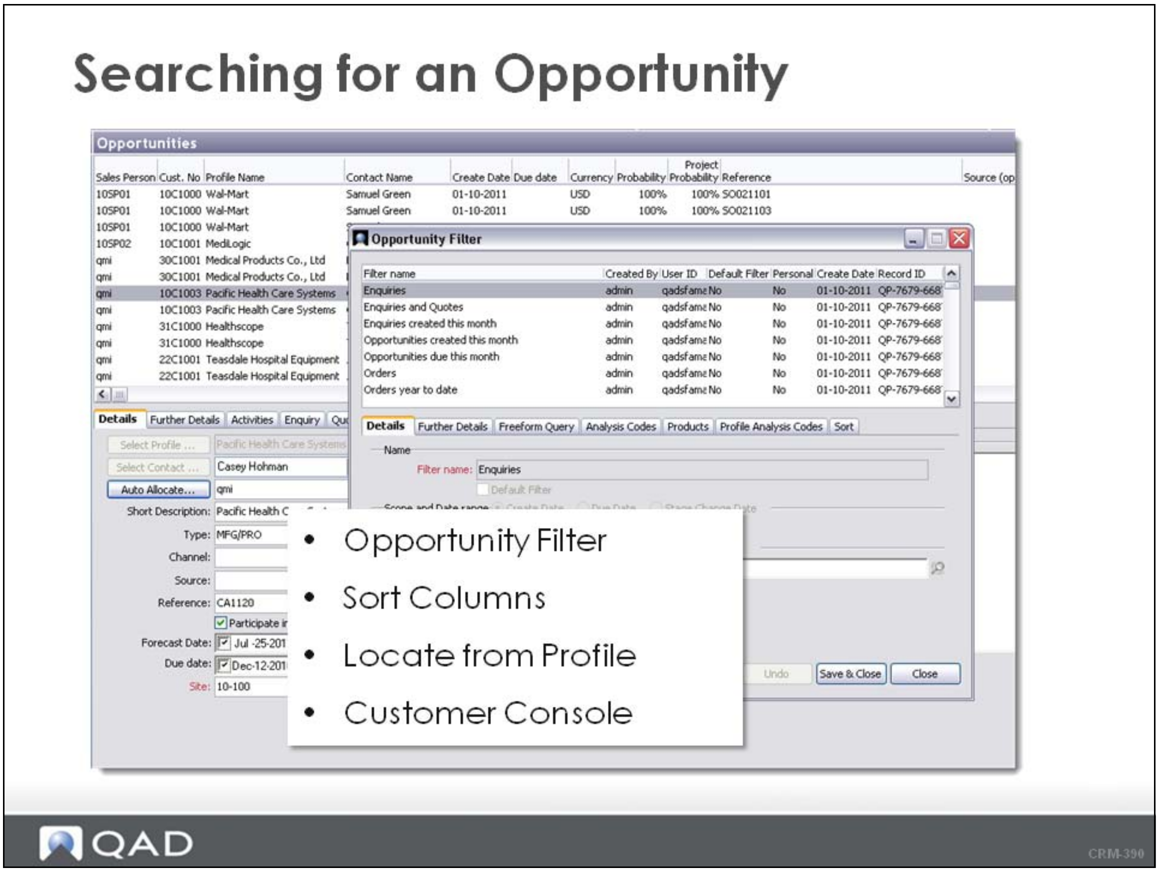


- An Opportunity is a business “deal” that managed effectively to turn the prospective “deal” or lead into an actual sale or order.
- Make sure that you associate Opportunities with a Profile, Contact, and Sales Representative.
- Typically Opportunities are managed through a staged business process which 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 have added the following stages: Installed base, Invoiced, 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



QAD CRM Opportunities are accessed from the Opportunity Screen, the Opportunity Tab in the associated Profile Record. If CRM/ERP Integration is active and the Opportunity Stage is set to Quote or Order, you can also access the opportunity screen from the Customer Console. In the Customer Console, you cannot view the opportunities that are in the Enquiry Stage.

Opportunity Filter

All the Opportunities for your organization are listed in the Opportunity Browser on the Opportunities Screen. The Opportunity Filter is similar to Profile Filter and Contact Filter. You can either use the existing filters or create your own filters to locate a subset of Opportunities.

Sort Columns

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

Profile Record - Opportunity Tab

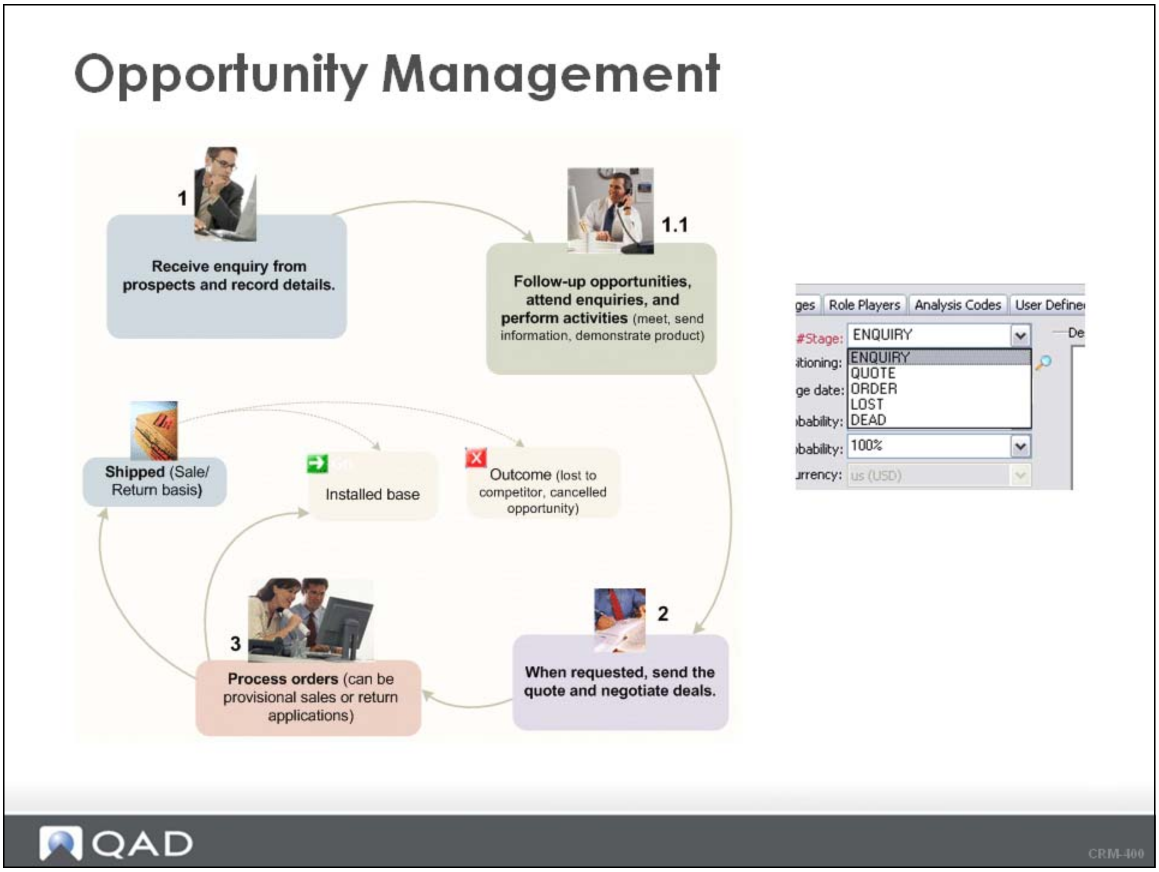
Opportunities **must** be associated with a Profile, Contact, and Sales Representative. The Opportunity Tab for each Profile has a list of all Opportunities associated with that Profile. You can sort and report on the Opportunities from the Opportunity Tab.

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).

Opportunity Management



Managing business opportunities is a 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.

Adding an Opportunity

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.

There are multiple ways to add an opportunity:

- On the Opportunities screen, click the Add button on the toolbar.
- On the Opportunities screen, right-click in the Opportunity Browser and choose Add.
- On the All Profiles screen, right-click in the Opportunities tab of a selected profile and choose Add.

Note Similar options are available for Add, Copy, and Delete.

We go through the detailed tab of Opportunity Details screen in the succeeding exercise. For more information on each tab of Opportunity Details, see *User Guide: Customer Relationship Management* or CRM Online Help.

Changing Opportunity Stages

The standard or fixed stages for a QAD CRM opportunity are:

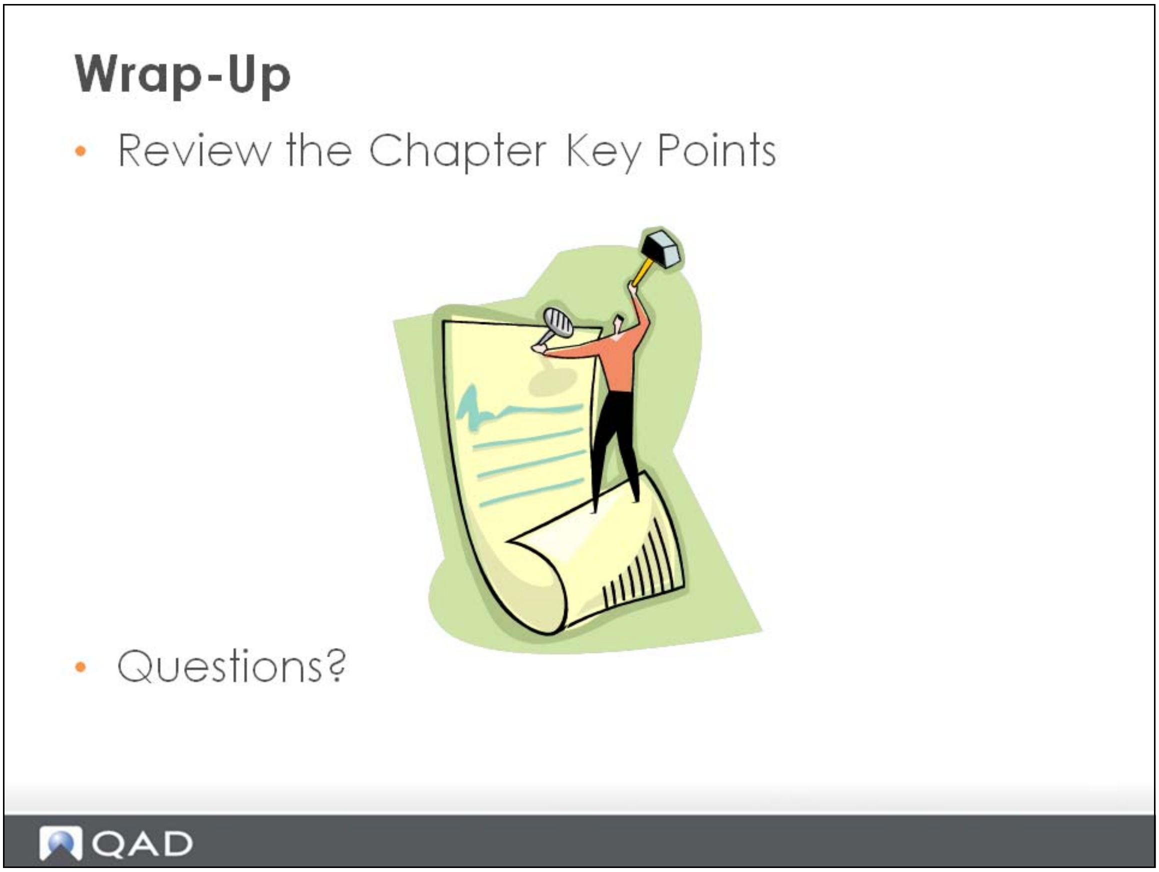
- Enquiry: It is the starting point for any opportunity and is mandatory.
- Quote: This stage corresponds to the QAD Enterprise Applications sales quote. It is only required if CRM will generate quotations or if sales quotes are used in QAD Enterprise Applications and visibility of those quotes is required in QAD CRM. You can print the quote from QAD CRM.
- Order: This stage corresponds to the QAD Enterprise Applications sales order. It is only required if CRM needs to create sales orders in Enterprise Applications or if visibility of sales orders created in QAD Enterprise Applications is required in QAD CRM.
- Invoiced: This stage corresponds to an order in Enterprise Applications as invoiced. When the sales order corresponding to a CRM opportunity is fully invoiced in Enterprise Applications, the stage of the opportunity is set to Invoiced.

An opportunity is initiated with the status of Enquiry. During your follow-up activities, you change the opportunity stages due to the progress of communication between you and your customer. We use a scenario in the exercise in this chapter to practice how to change the stages.

Master Questions

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.
   - d ______________________________
   - e ______________________________
   - f ______________________________
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?)

Wrap-Up



- 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 when 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.

Exercise

Task 1. Use the following scenario to create an opportunity for an existing customer.

You receive a call from Gene Artuso at Houston Automotive Group. Gene would like to learn more about the automotive connectors. You promise to send Gene some literature and to call Gene after Gene has had a chance to review the product literature in more detail. Make sure that you create a follow-up telephone activity.

1 Navigate to the Houston Automotive Group 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 us 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 Houston Automotive Group Profile or the User ID of the individual adding the Opportunity.

- *Profile = *Houston Automotive Group*
- *Contact = *Gene Artuso*
- *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 = *Automotive connector*

  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. Opportunities are sent to QAD ERP when they Opportunity Stage has progressed beyond the ENQUIRY Stage.
- Participate in Forecast = *Selected by Default*

  If you do not want the Opportunity to be considered in the Sales Forecast, unselect this field. 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*

  It 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 automotive connectors*

3 Save the Opportunity.

4 Review the Opportunity from the Detail Tab. Notice that 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. The Activity is automatically associated with the Opportunity. Review the Activity on your Calendar.

Task 2. Use the following scenario to change the opportunity stages.

A week has passed and Gene Artuso at Houston Automotive Group has received and hopefully read the information you forwarded concerning the automotive connectors. It's time to call Gene. 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 phone number of Gene from the Activity. You can record your conversation with Gene directly into the Opportunity on QAD CRM by opening the Opportunity from the Associate it with field. Double-Click Automotive connector, which is the Opportunity Short Description.

2 As you chat with Gene, Click the Further Detail Tab in the open Opportunity and record the Strengths and Weaknesses of this opportunity.

3 You ask Gene if Gene has investigated any of the competition. Click the Role Players Tab and record Gene's answer by entering the Competitor Gene has researched. The Competitor must be a Profile in QAD CRM. Right-click Competitor and choose Add. Click Select Competitor, the Profile Search Screen appears. Search for a Profile Type of Competitor. If it does not exist, add the Profile (Profile Name = ABC Automotive).

4 Gene is explaining the products that Gene is interested in. Select the Enquiry Tab, right-click, and choose add to add these Products to the Enquiry.

5 Choose the Automotive Connector product ID 02001 for 10,000 Units.

6 Click Save & Close to close the Opportunity Lines Details window.

7 On the Enquiry tab, right-click and choose Change Opportunity Stage.

8 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 and click OK.

   QAD CRM notifies you that the Enquiry Lines are converted to a Quote.

9 Select the Quote tab to see that the automotive connector line is 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.

13 Save the Telephone Activity Record. The Telephone Activity is Processed and Closed. Processed and Closed Activities are displayed with strike-thru text.

One week later, Gene decided to purchase the automotive connectors and placed an order. What you are going to do is to change the stage from Quote to Order.

1. From the All Profiles screen, select the Houston Automotive Group profile and go to the Opportunity tab.
2. Open the automotive connector opportunity and go to the Quote tab.
3. Right-click the record that you want to change the stage and choose Change Opportunity Stage.

   The Opportunity Change Screen appears with the Stage set to ORDER.
4. Select the product line that you want to change to Order stage and click OK.

   The system notices you that the sales order has been successfully created in QAD ERP.
5. Select the Details Tab and check the Reference Field. The Reference Field now contains the ERP Sales Order Number. When the Opportunity was moved to the ORDER Stage, it was sent from QAD CRM to QAD ERP. QAD CRM was updated with the ERP Sales Order Number.

   You can view the Sales Order in the ERP Sales Order Browse Screen by searching with the ERP Sales Order Number in the Reference Field.

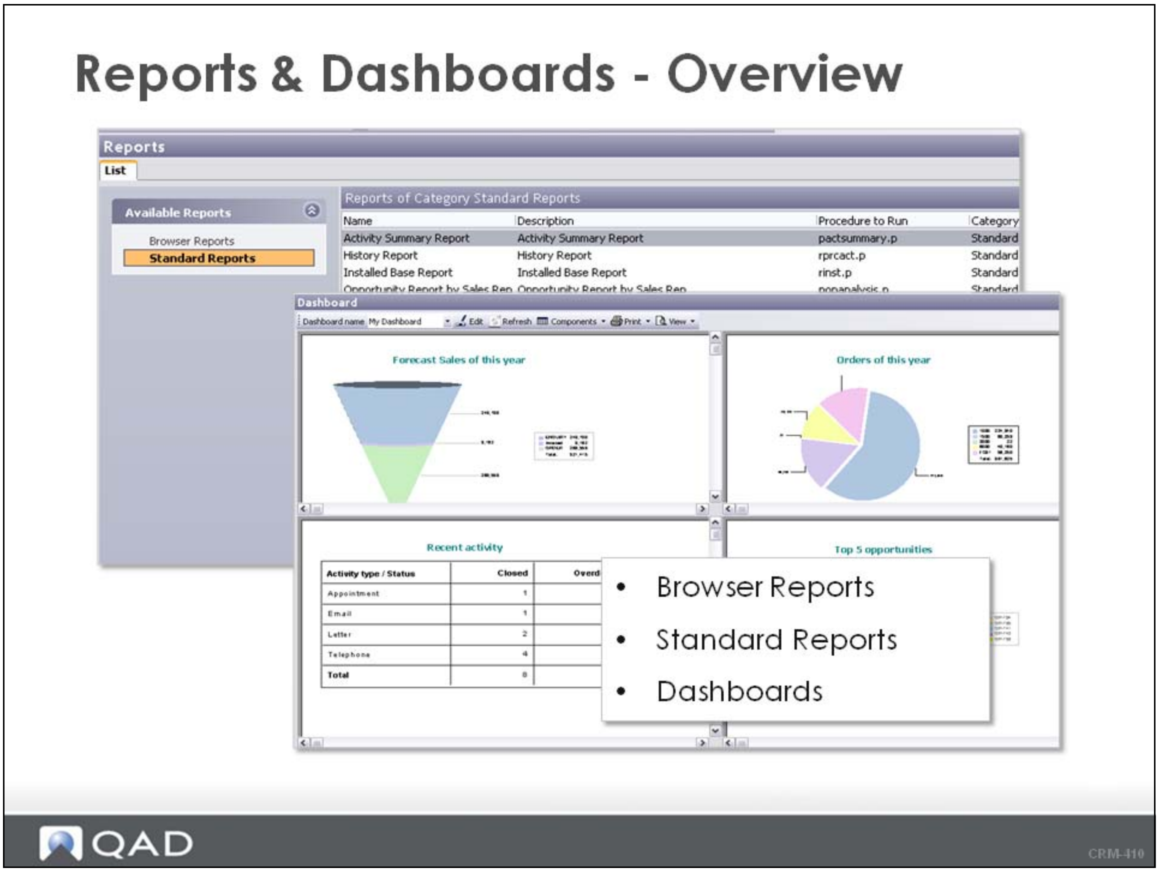
You can continue to change the stages as your company’s process.

Chapter 7

Reports and Dashboards

This chapter provides information of Reports and Dashboards, which help generate the information you need for making strategic decisions.

Overview



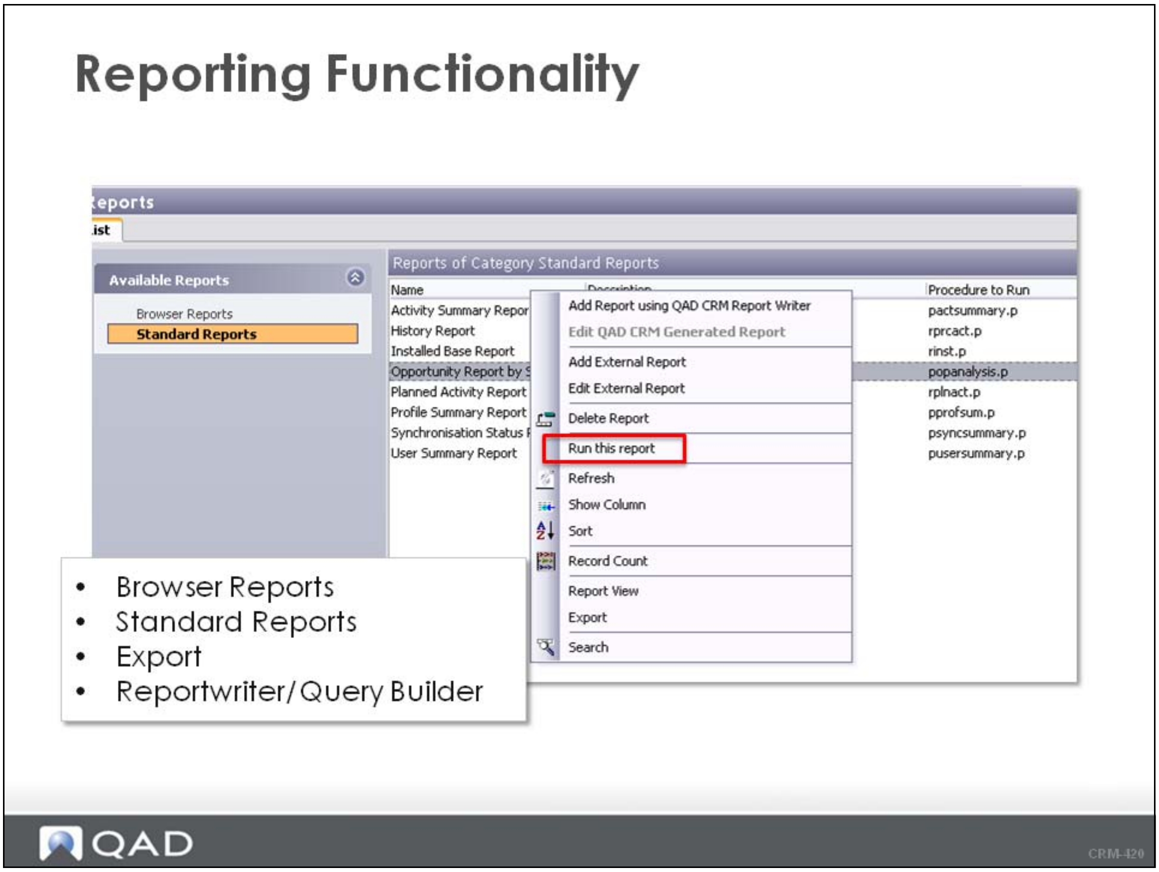
In this chapter, you learn how QAD CRM helps you generate the information you need for making strategic decisions by reporting and analyzing your customer relationships and business opportunities.

Learning Objectives

By the end of this chapter, you are 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.
- 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

Reports screen

The Reports screen displays the saved reports available for your reuse in QAD CRM.

You also create reports using the Report Writer tool from the Reports screen.

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

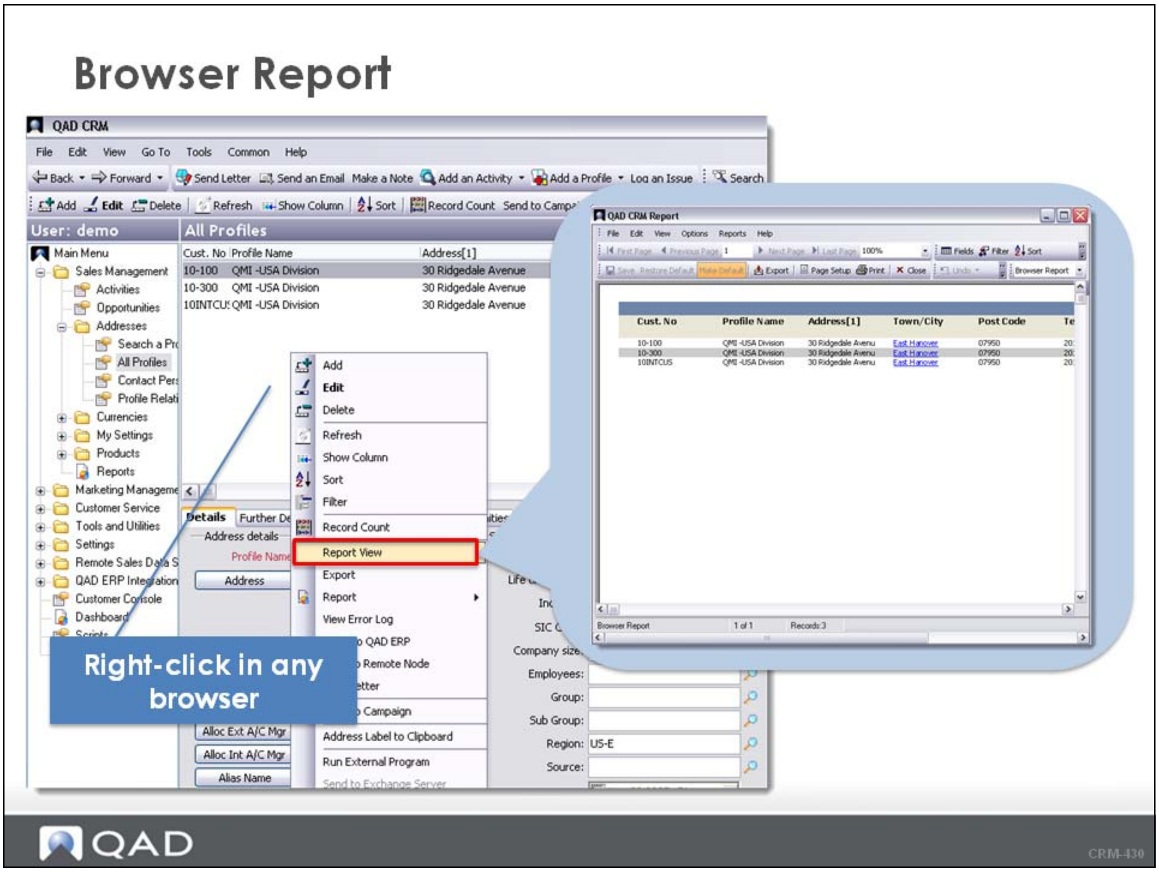
Main Menu|Sales Management|Reports

Report Categories

Report Categories allow you to categorize your reports for quick access. There are system pre-delivered report categories on the Reports scree. Your System Administrator can also define the report categories.

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



A browser report provides a report layout of the records displayed in a browser. You can create browser reports in the system through any of the data screens, such as Profile browser, Contact browser, and Opportunity browser.

To access default browser reports, right-click any data screen and choose Report View. The browser report displays in the report viewer. You can also format the contents into a more sophisticated report.

You can modify the settings of the report through the toolbar buttons, then save new instances of a displayed browser 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 rearrange 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 rerun. When you save a Browser Report on the Test System, save the Report to the Browser Category.

Note Modify the generated browser report before you save it. Otherwise, the Save button is inactive.

Running a Saved Browser Report

To run a saved browser report:

1. Go to the browser where the saved browser report is generated.

   For example, if you want to run a browser report that is created in the Contact Persons browser, ensure that you are in the Contact Persons browser.

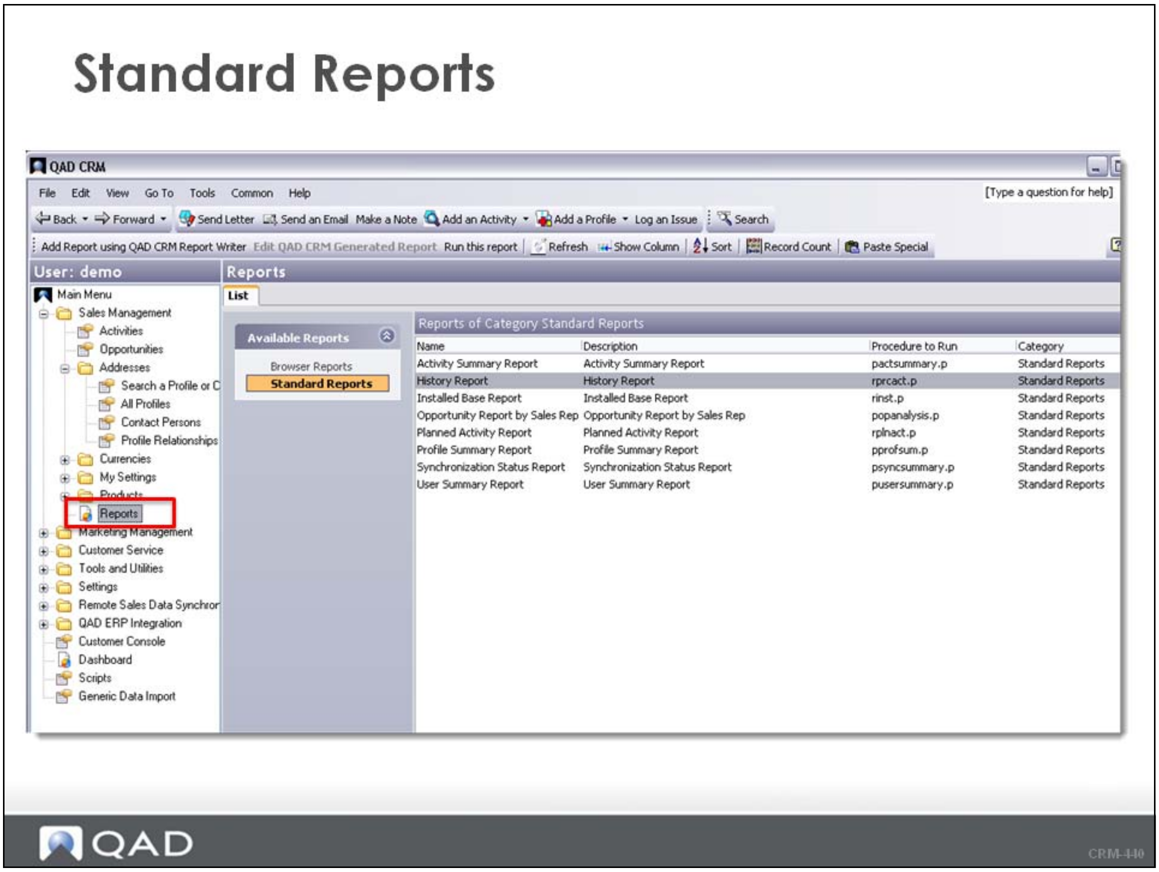
2. Right-click in the browser and choose Report View from the context menu.

   A browser report is generated.

3. On the toolbar of the new report window, click Browser Report to open the list and choose the report that you want to run.

4. If the content of the report is not up-to-date, click Refresh button to update it.

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

You can run Standard Reports 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:

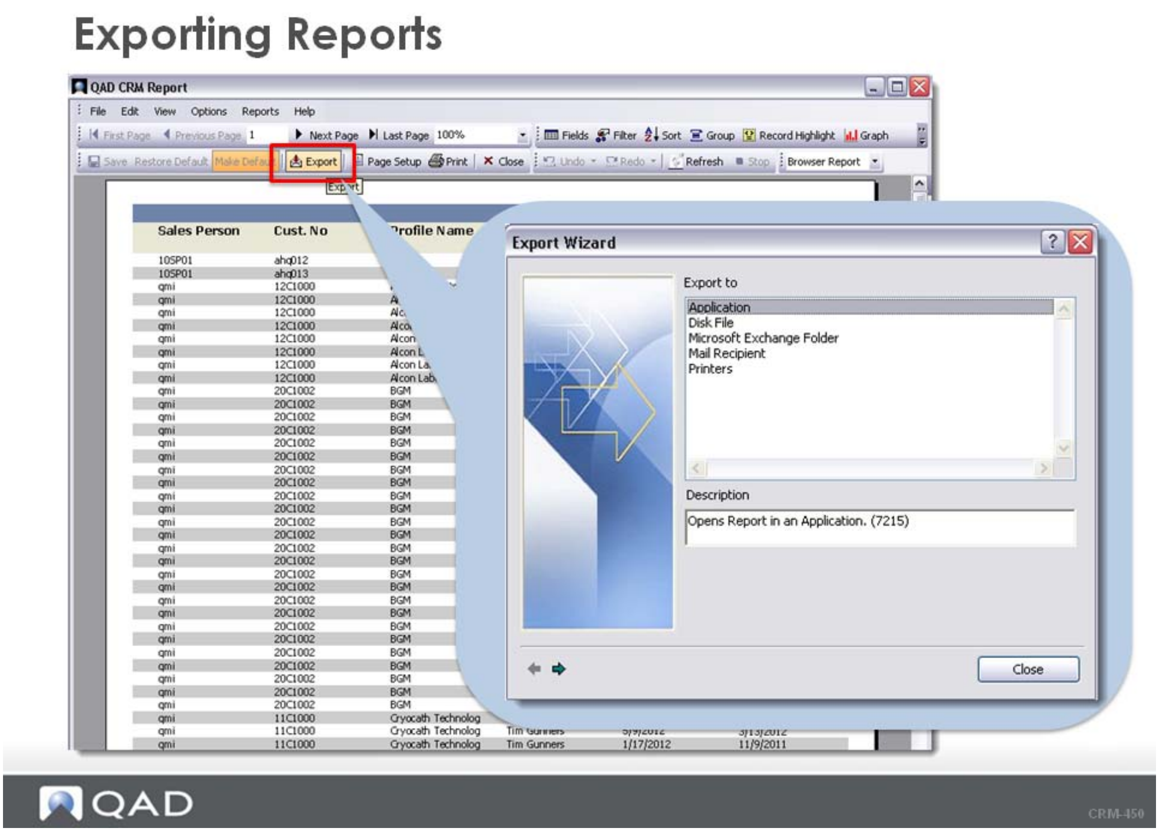
- Activity Summary Report
- History Report
- Planned Activity Report
- Synchronization Status Report
- User Summary Report.

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.

Exporting Reports



The system allows you to choose the output channel of a selected report through the Export option. There are multiple ways to export a report:

- Choose Export from the File menu.
- Right-click in the browser and choose Export from the context menu.
- 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 can 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

In this class, we take MS Excel format as an example. To export a report to MS Excel:

1. Form the toolbar of a report, click Export.

   The Export Wizard is displayed.

2. Select Application in the Export to area and click the forward navigation arrow on the bottom-left corner of the wizard.

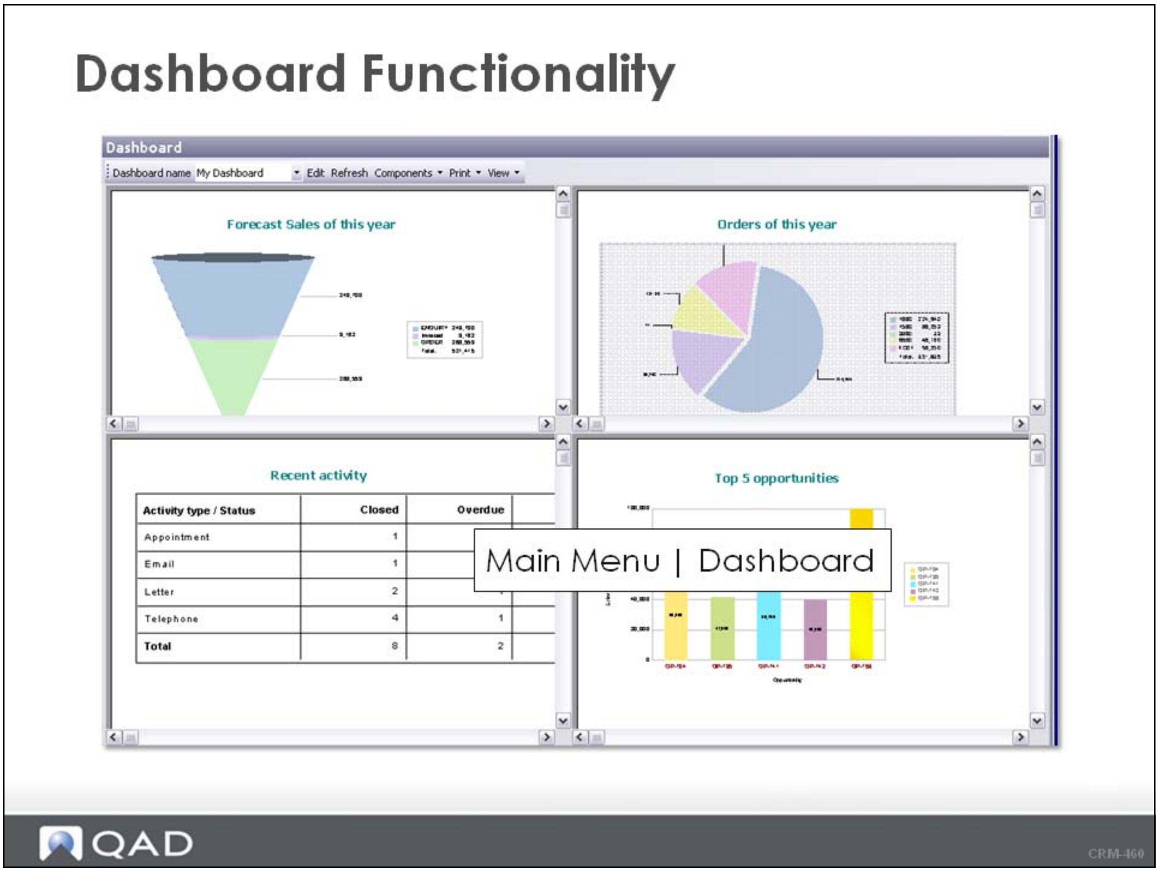
3. On the Export to Application page, select Microsoft Excel (.xls) and click OK.

4. When the exported report opens in MS Excel, save the .xls file to your desired directory.

If you do not want to preview the report or changing settings for the report before exporting, you can do the following to export:

- For Browser Report, right-click in the browser where you want to generate a report and choose Export from the context menu.
- For Standard Report, right-click a report at Sales Management|Reports|Standard Report and choose Export from the context menu.

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.

Master Questions

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:

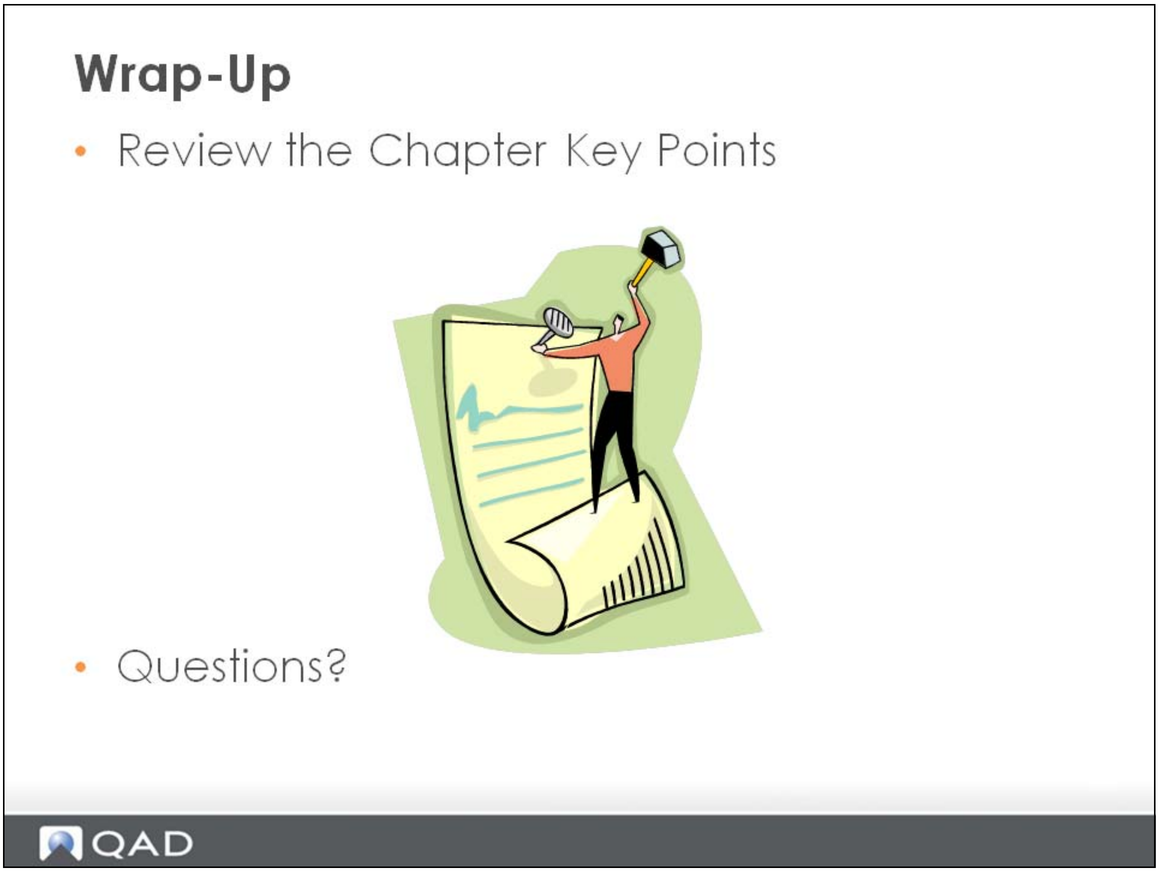
   f ________________________________

   g ________________________________

   h ________________________________

6 Dashboards can contain a max of __________ components.

Wrap-Up



- QAD CRM has a number of reporting tools and options including:
  - Browser Reports
  - Delivered Standard Reports
  - Exporting data to various output channels (including Microsoft Excel and Word)
- 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 four 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 your run the report.

Exercise

Task 1. Create a report using a 3-D pie chart that breaks down the number of Customer Profiles by Country.

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 = *Profile Type*
- Condition = *Contains*
- Value = *customer*

Click OK to apply the Filter to the report.

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 add the Country field to both the On change of box and the Show Value(s) box.

6 Select the Format Tab and enter a Title for the Pie Chart.

7 Click OK and save the Browser Report as:

- Name = *Customer Profile Analysis*
- Description = *Customer Country Profile Analysis*

8 Navigate to the Reports screen and select the Browser Report category.

Note If the Customer Profile Analysis report does not display, fresh the screen (File|Refresh).

Task 2. Run a Profile Summary Report for one of your customers.

Once a quarter, you run a Profile Summary Report for each of your customers. This report gives you a 360-degree view of all activities for the Profile. Today you want to run a Profile Summary Report for Houston Automotive Group.

1 In the Standard Reports category of the Reports screen, right-click the Profile Summary Report and click Run this report.

The Profile Summary Report screen displays.

2 Right-click in the profile browser area and choose Attach Profile from the context menu.

The Find Profile/Contact screen displays.

3 Search for the profile of Houston Automotive Group.

4 After add the profile to the report, review the Basic Filter selection criteria on the bottom part of the Profile Summary Report screen. Clear the following filter options and click OK.

- User-Defined Fields
- Addresses
- Campaigns
- Contracts
- Installed Base
- Contract

5 You are prompted to Save the Report Settings so you can rerun the report later. Save the report.

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.

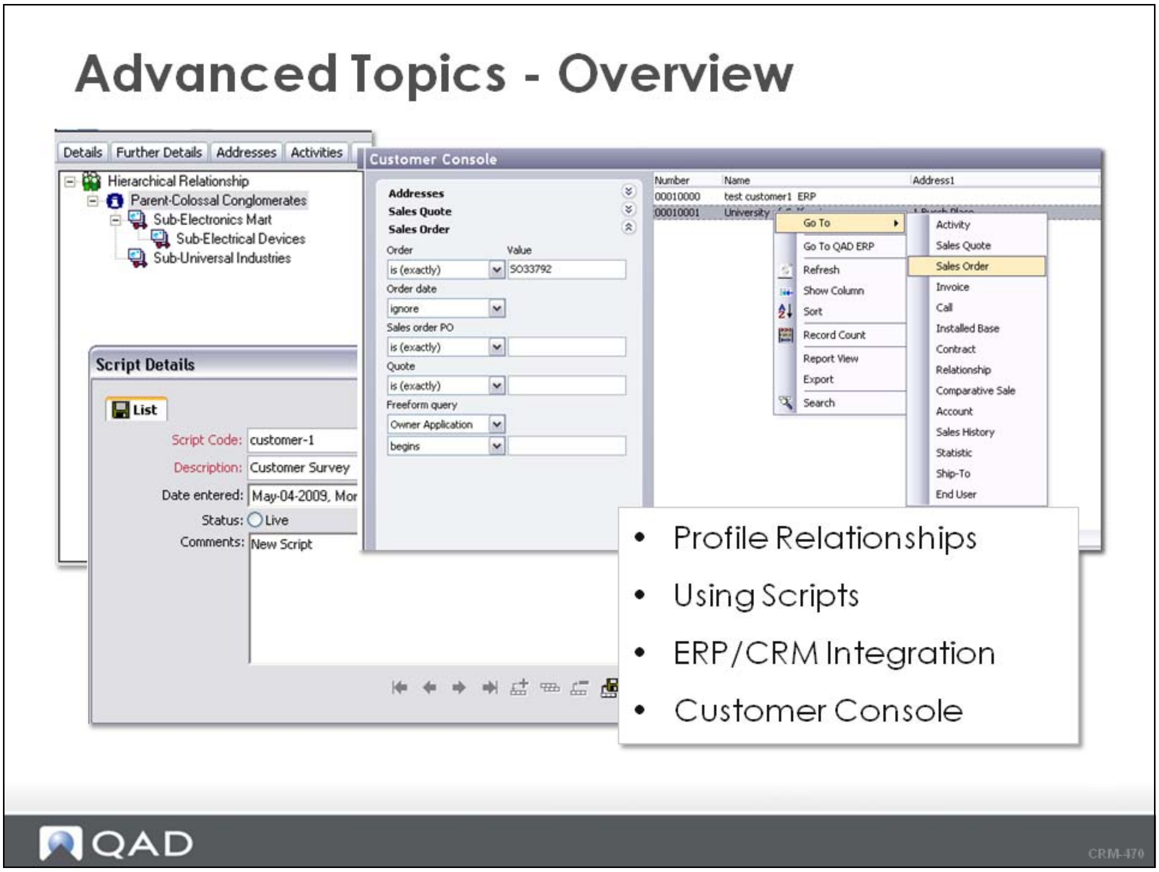
7 The Profile Summary Report of Houston Automotive Group appears in the Reports screen| Standard Reports category for later access.

Chapter 8

Advanced Features

This chapter provides information of advanced features in QAD CRM and shows how the concepts introduced in the previous chapters are all used together.

Overview



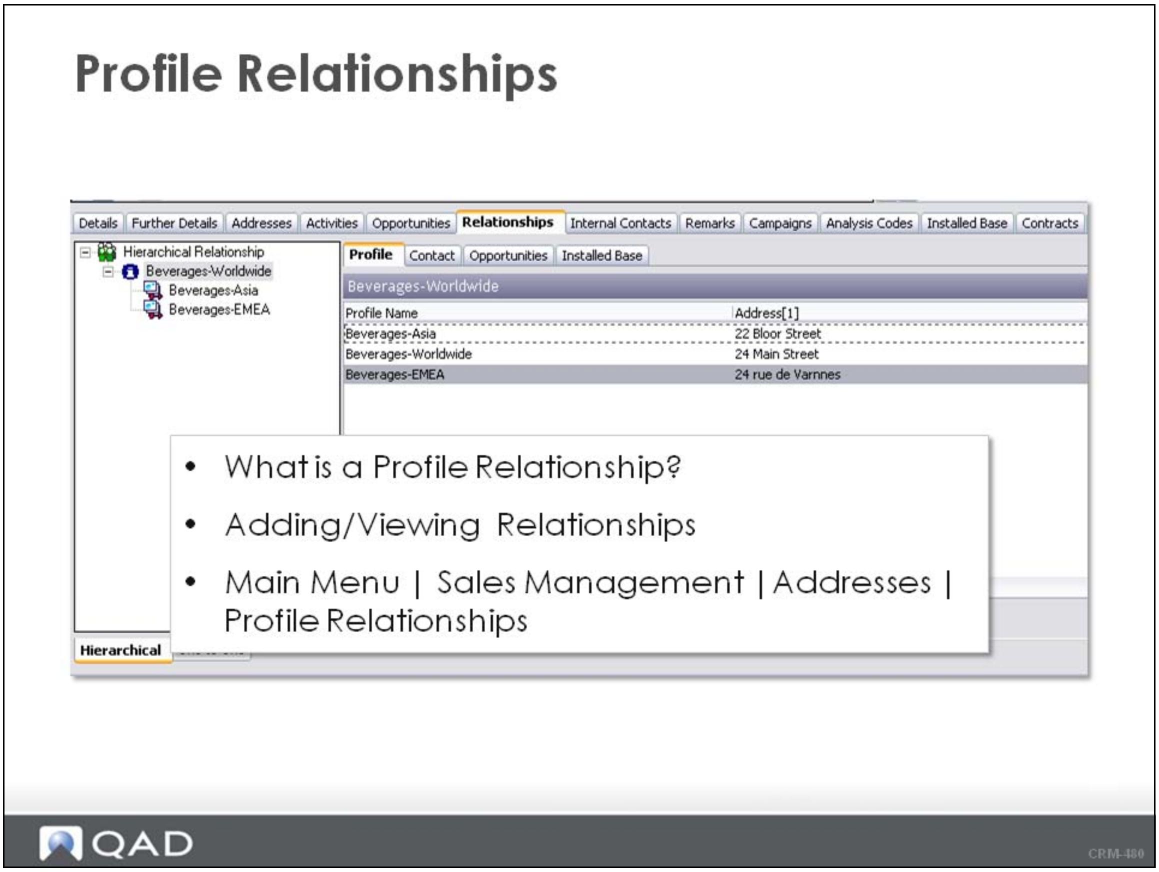
This chapter contains a number of QAD CRM advanced features that build on the knowledge gained earlier in the training.

Learning Objectives

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

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

Profile Relationships

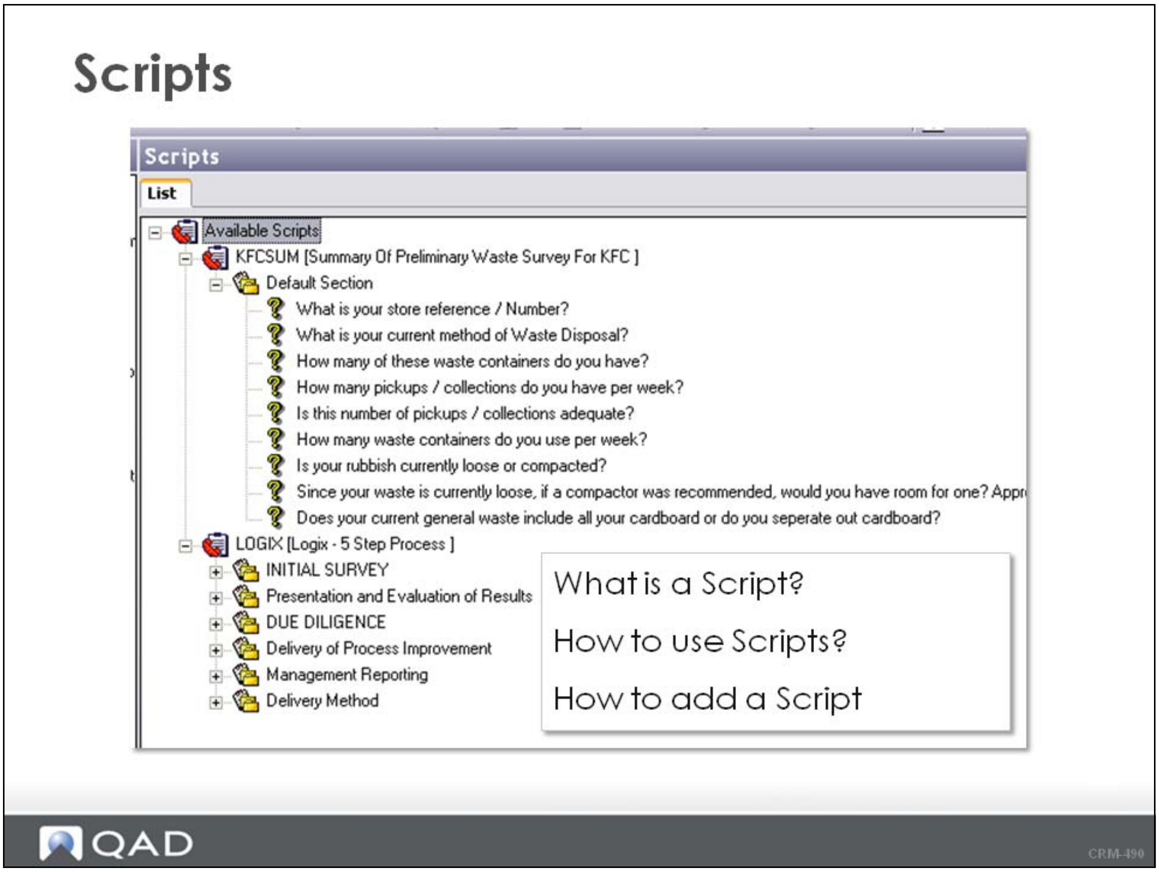


The organizations that you do business with can relate to one another in an organizational hierarchy. For instance, there could be a parent company with many subsidiaries.

Your organization might want to manage all related companies under one account management structure or at the 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.

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 create scripts for use in various departments.

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

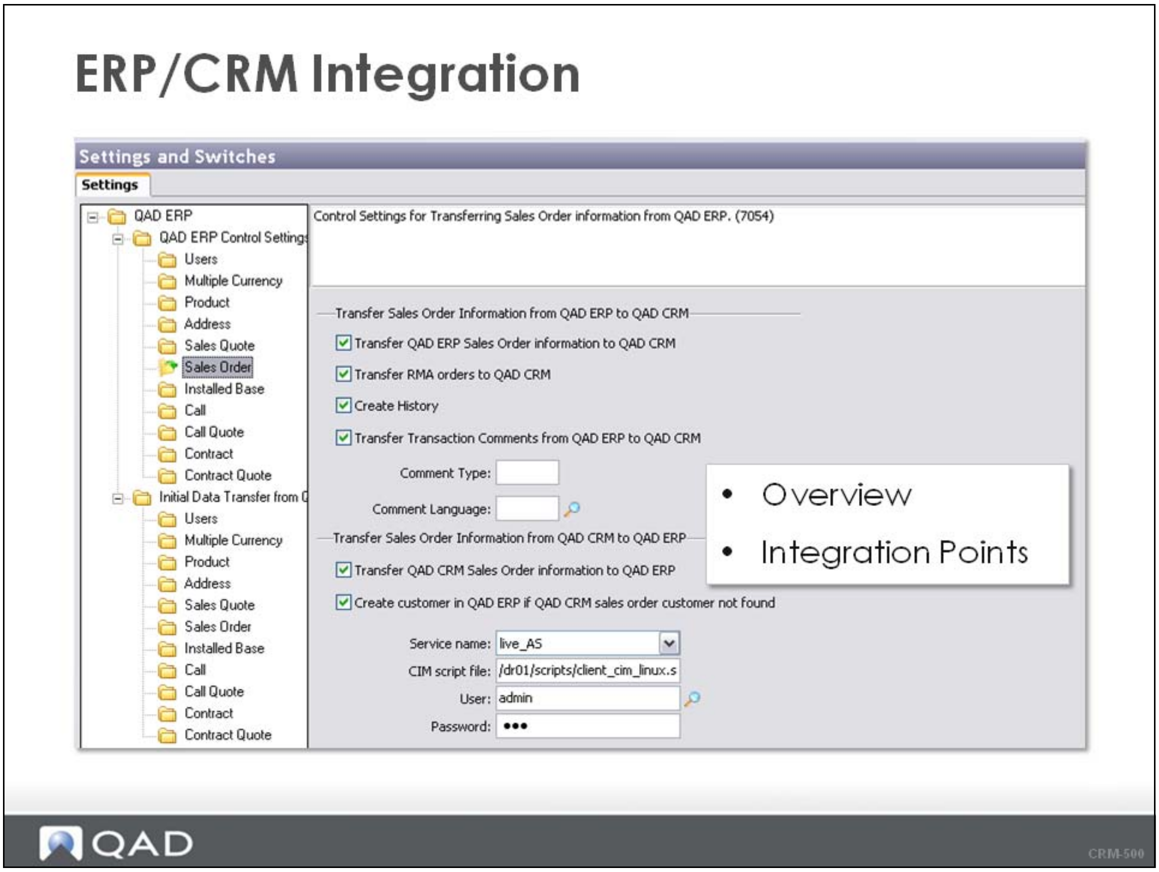
Sales can use a script during a new product release to queue sales representatives as to the important questions to ask a customer. Sales can also find a script useful to query customers on reorder amounts for certain products that a customer reorders on a regular basis.

Typically the sequence of script-related events in your system would occur in the following sequence:

1. Maintaining your scripts. This step involves tasks such as creating or editing sections, subsections, questions, and subquestions.
2. Attaching scripts to targets (profile/target combinations).
3. Processing scripts. This step involves contacting the profiles/contacts that are your targets to capture their responses to your script.
4. Analyzing script responses. This step involves using search criteria to focus on the targets that responded to your scripts in a way that facilitates your marketing efforts.

For more information on using scripts, see *User Guide: Customer Relationship Management*.

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 sets 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, you are prompted whether you want to send this Profile to QAD ERP. However, when you change the Opportunity stage from Enquiry to Quote, the Quote is automatically sent to QAD ERP.

The following modules can be integrated:

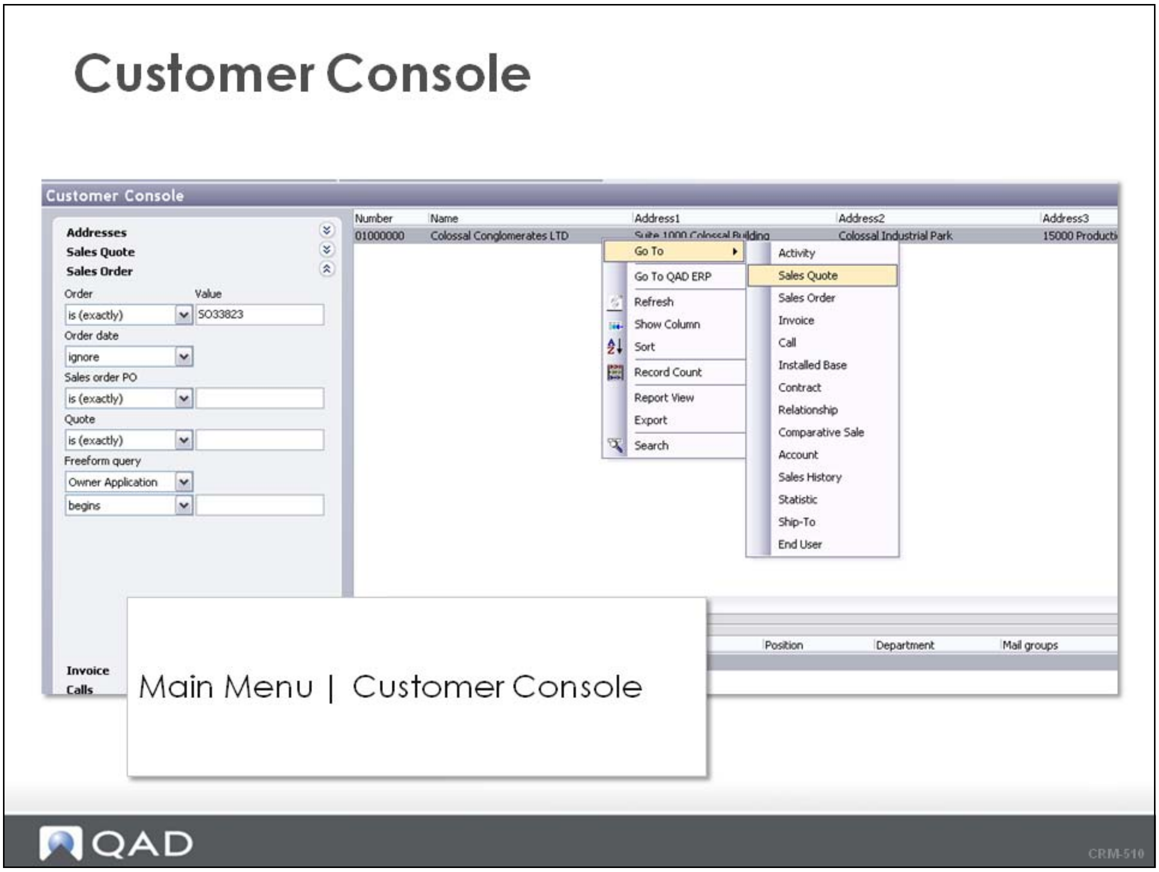
- Product
- Address
- Sales Quote
- Sales Order
- Installed Base
- Call

- Contract
- Contract Quote
- Call Quote
- Multiple Currency
- Users

As a sales or an account manager, you would not set up this integration, but you want to access the data in QAD ERP sometimes.

In the followed Customer Console, we introduce how you can easily toggle and share information between QAD ERP and QAD CRM.

Customer Console



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

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

The Customer Console searches QAD ERP based on your input and returns the appropriate data. You can also use the options of Go To QAD ERP or Go To a particular screen in QAD ERP, such as the Sales Order or Sales Quote screen.

Note To use the Go To options, ensure that you have access to QAD ERP and that QAD ERP integration is enabled.

Master Questions

1 You do not need a login 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 ______________________________

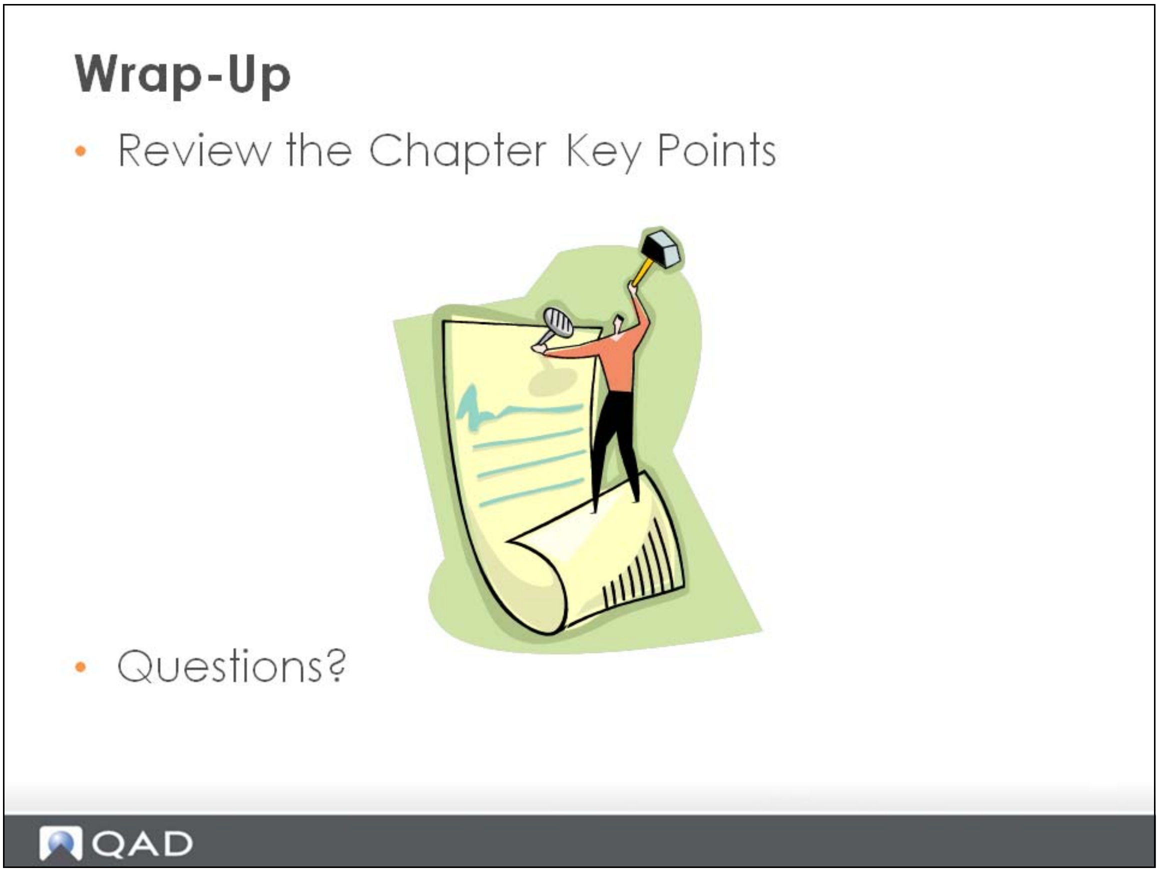
  k ______________________________

  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?)

Wrap-Up



- 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.
- All roles can sue scripts in your organization - sales, marketing, customer service, etc.
- Scripts are a series of questions 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.

Exercise

Use the following scenario to set up profile relationship.

Your customer Houston Automotive Group has purchased the following organizations that you do business with:

- ABC Automotive
- Auto-Plas International

You have also learned that Autoliv France SNC is a spin-off of the ABC Automotive.

Let us set up these relationships!

1 Navigate to the Profile for Houston Automotive Group. Select the Relationships Tab.

2 Right-click Hierarchal Relationships and Add Hierarchy. Name the Hierarchy: Parent-Houston Automotive Group.

3 Right-click in the Relationships Profile Tab and add the Profile Houston Automotive Group.

4 Review the following Houston Automotive Group information:
   - Opportunities tab
   - Relationship Opportunity tab
   - Relationship Contact tab

Note The information contained in the Houston Automotive Group record is also displayed in the appropriate tab under Relationships.

5 ABC Automotive and Auto-Plas International are both companies that report to Houston Automotive Group. Right-click the Parent-Houston Automotive Group and Add a Sub-Hierarchy named Sub-ABC Automotive.

6 High-light Sub-ABC Automotive in the Hierarchal Relationships and attach the Profile in the Relationship Profile tab.

7 Repeat for Auto-Plas International. Make sure that they are both equal “subs” in the Hierarchy.

8 Auto-Plas International is the “parent” company of Autoliv France SNC. Right-click Sub-Auto-Plas International and add Autoliv France SNC.

9 Navigate to any of the Profiles in the hierarchy and check the Relationship tab. Check and uncheck the Include Sub Hierarchies box at the bottom of the screen - what data do you see?

Product Information Resources

QAD offers a number of online resources to help you get more information about using QAD products.

QAD Forums (community.qad.com)
Ask questions and share information with other members of the user community, including QAD experts.

QAD Knowledgebase (knowledgebase.qad.com)*
Search for answers, tips, or solutions related to any QAD product or topic.

QAD Document Library (www.qad.com/documentlibrary)
Get browser-based access to user guides, release notes, training guides, and so on; use powerful search features to find the document you want, then read online, or download and print PDF.

QAD Learning Center (learning.qad.com)*
Visit QAD’s one-stop destination for all courses and training materials.

*Log-in required