User Guide

QAD Customer Relationship Management

Introduction
Sales Management
Marketing Management
Customer Service

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QAD CRM User Guide Change Summary

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

Date/Version	Description	Reference
April 2014/6.6.2	Updated the information about Using Reports	--
	Updated the information related to Graph options in Maintaining the Dashboard	--
March 2013/6.6.1	Rebranded for version 6.6.1	--
November 2012/6.6	Updated information on using e-mail to submit visit reports	page 69
October 2012/6.6	Added steps for creating QADCRM category in MS Outlook	page 16
	Updated steps for Activity Synchronization	page 17
	Updated settings for e-mail composition	page 37
	Added Exchange Server Settings	page 47
	Updated the options for Send Appointment Notification	page 62
	Added a new section on Customer Visit Reports	page 69
	Added a new section on e-mail synchronization	page 69
	Added a new section on contact synchronization	page 117
	Deleted the description of creating custom buttons in MS Outlook	--
March 2012/6.5.1	All the screenshots have been updated to reflect UI changes on the webclient	--
	All references to (service) calls have been changed to issues throughout the book	--
	Updated and Sales Management overview to include the sales management process map	page 11
	Updated and Marketing Management overview to include the campaign management process map	page 13
	Removed the step regarding the Remember Settings option from the logging out steps	page 22
	Updated the information about common icons	page 28
	Updated the information about the Make a Note window	page 31
	Updated the information about using help	page 34
	Updated the information about general preferences settings	page 36
	Removed the step regarding the Associates shortcut menu in the Activities calendar	page 65
	Updated the information about searching for profiles and contacts	page 94
	Updated Customer Console information regarding changed search logic	page 126
September 2011/6.4.4	Updated the section on integration with Microsoft Exchange Server	page 16
	Added a new section on deleting sales quote lines	page 90

Section 1

Introduction

This section includes conceptual overviews and information for getting started with QAD Customer Relationship Management (QAD CRM).

Overview 9
Contains an overview of QAD Customer Relationship Management (QAD CRM).

Getting Started 21
Describes the system interface, common functions, login process and password change procedures for the QAD Customer Relationship Management (QAD CRM) system.

Defining Preferences and Settings 35
Describes setting general preferences when working with the system, defining appearance settings, and maintaining personal profile details.

Using Tools and Utilities 49
Describes how to use the tools available in the Tools and Utilities menu.

Chapter 1

Overview

This section contains an overview of QAD Customer Relationship Management (QAD CRM). It discusses the following topics:

Introduction 10
Discusses the different sections of CRM and how they are used.

Sales Management 11
Explains how Sales Management works and lists its functions and modules.

Marketing Management 13
Discusses the functions of Marketing Management and lists its modules.

Remote Sales 13
Discusses the uses of the Remote Sales function.

Integration with QAD Enterprise Applications 14
Discusses how CRM can be integrated with other modules and lists them.

Working With Multiple Domains and Business Units 15
Explains how CRM connects to other domains and programs.

Integration with Microsoft Exchange Server 16
Explains how to use the Exchange Server Integration module.

Introduction

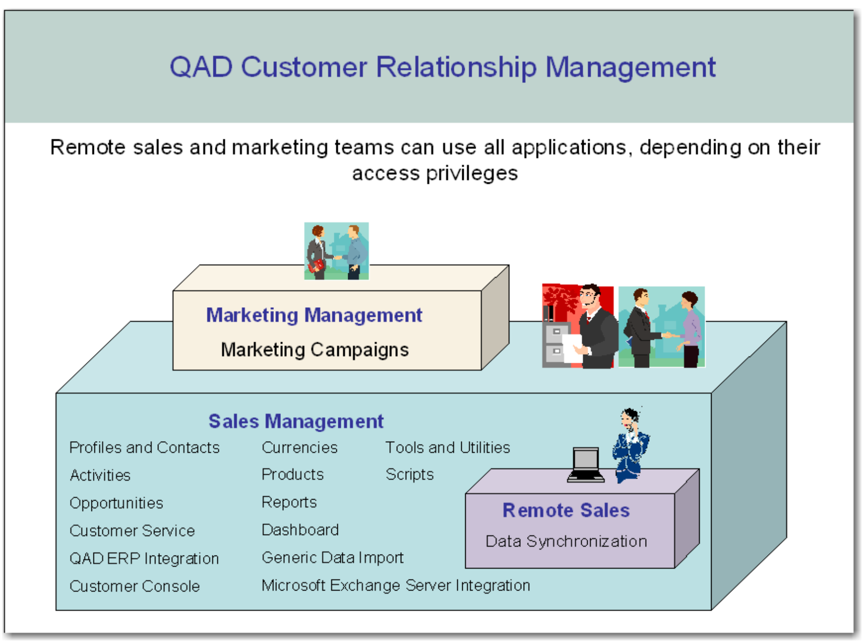
QAD CRM helps streamline business generation, and improves salesperson productivity with communications and scheduling tools, pipeline and forecast management functionality, and customer service capabilities. It shortens the sales and marketing cycles by automating your daily activities, promotes business growth by letting you store opportunity details, and aids in marketing endeavors by helping plan and execute campaigns.

QAD CRM is fully integrated into core QAD ERP application functions such as Sales Orders/Invoicing and QAD Service and Support Management. This allows field processing of orders and updates on status of service and support issues.

The system consists of the following functional areas:

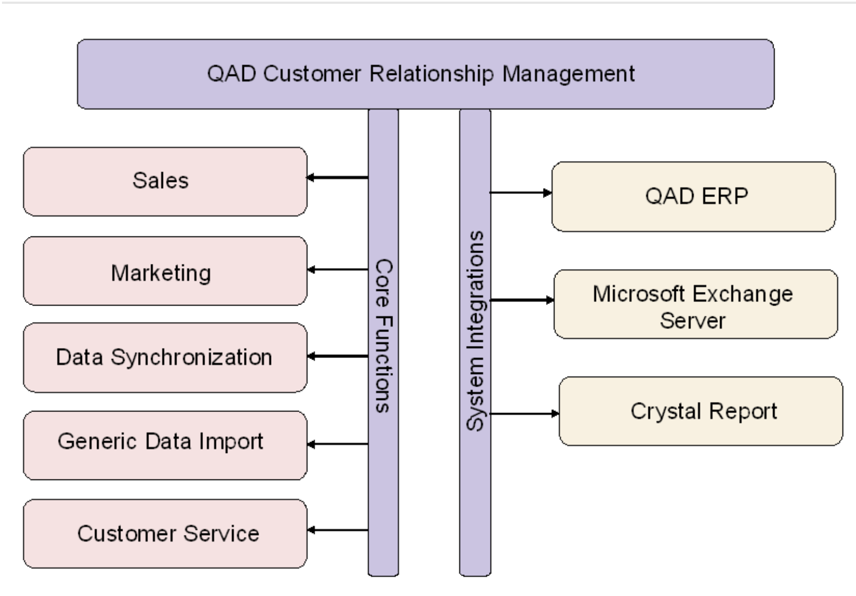
- Sales Management
- Marketing Management

Fig. 1.1
QAD CRM Functional Areas



The Sales Management layer forms the core layer of the product. Enterprises can add the Marketing Management layer to the base layer, depending on evolving business requirements and budget.

Fig. 1.2
Core and Integrated Functions



Sales Management

Sales Management is the foundation layer of the system. It improves the efficiency of a company's sales force by helping to increase sales closure rates and supporting high-quality relationships with customers.

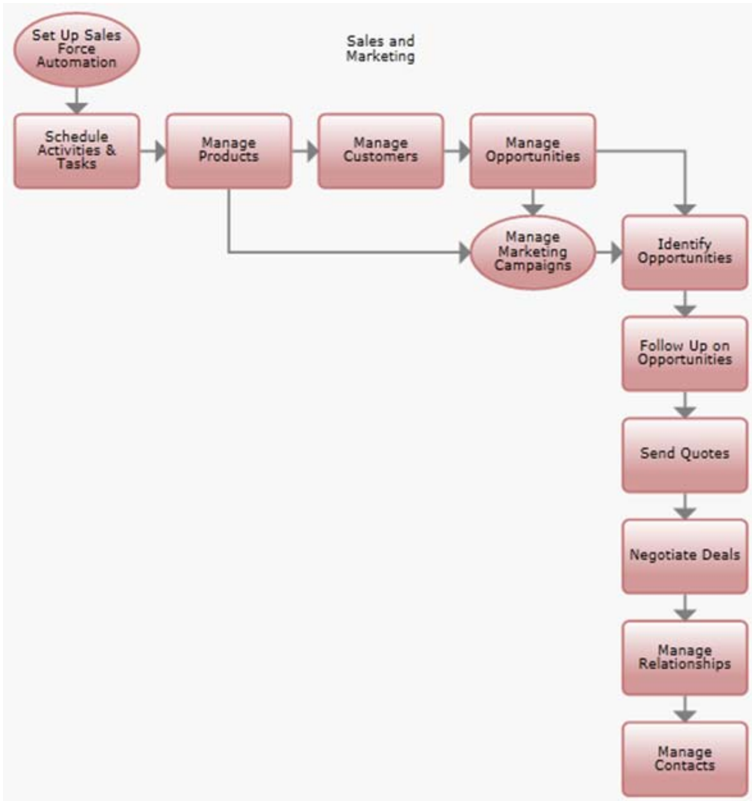
Sales Management provides sales force automation tools that allow organizations to manage existing accounts, prospect for new customers, organize contact lists, and access current customer information easily. It helps salespeople focus on turning opportunities into completed sales by providing easy-to-use tools that help manage all opportunities, contacts, and sales activities.

Sales Management helps the salesperson through the sales cycle, automating various day-to-day sales tasks. For example, the system can help:

- Manage details of clients and prospects.
- Manage various sales activities, such as making appointments and pursuing inquiries.
- Explore business opportunities.
- Evaluate competitors and partners.
- Generate sales-related reports.

The following standard, customizable sales process map is provided to act as a guide or road map to manage general sales activities. Each of the steps consists of an aspect of the sales cycle and details a defined set of activities to be followed by each sales representative.

Fig. 1.3
Sales Management Process



The various modules of the Sales Management layer interact within themselves to assist you through the selling cycle. The modules in the Sales Management layer are:

- Activities
- Opportunities
- Addresses, including Profiles and Contacts
- Currencies
- Products
- Customer Service
- Remote Sales
- Customer Console
- Scripts
- Dashboard
- Reports
- Tools and Utilities
- QAD ERP Integration (optional)

Though most of these modules are also available in Marketing Management, Opportunities and Currencies are unique to the Sales area. If you use QAD ERP, you can also choose to add the QAD ERP Integration module.

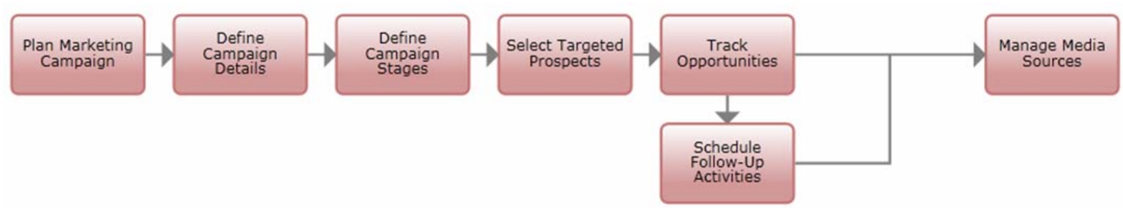
In addition to these modules, QAD CRM also includes various inherent features like the ability to send e-mail messages to contacts directly from the system and create documents for single or multiple contacts using the mail-merge facility. It also provides access to various tools like the calculator and the event log and lets you run external programs.

Marketing Management

Marketing Management integrates with Sales Management seamlessly. It boosts marketing efforts by improving the efficiency of lead-generating activities, competently selecting appropriate target markets, and effectively managing campaign execution for consistent success.

Marketing Management automates the campaign process through various tools such as campaign definition, detailed campaign planning and program launch, scheduling of activities, and media source management. By capturing, extracting, and analyzing campaign information, marketing groups are better equipped to design future campaigns that enhance customer relationships and ultimately increase profits.

Fig. 1.4
Marketing Campaign Management Process



Marketing Management helps companies create target lists based on key criteria that focus the campaign on high-probability prospects. The solution facilitates the creation of detailed campaign budgets and enables accurate tracking of all costs associated with a particular campaign. This tracking capability not only helps a campaign stay on budget, but also provides information that can be used for analysis of cost per lead.

Marketing Management provides powerful features to manage marketing campaigns by extracting and consolidating information from the Sales Management layer. For example, you can derive the target audience of a campaign from the details of profiles and contacts already existing in the system. You can use the Scripts module to maintain surveys and telemarketing scripts. Similarly, the mail-merge feature can help you send marketing literature to your target audience. You can also generate various useful reports related to marketing.

All the modules of the Sales Management layer are accessible through Marketing Management also. The modules specific to Marketing Management are:

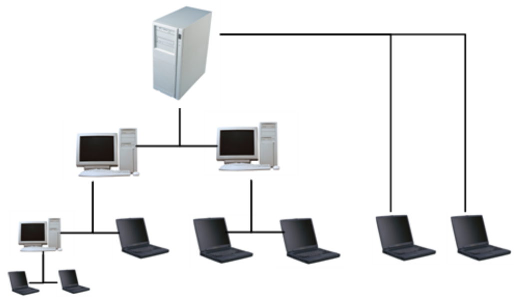
- Marketing Campaigns
- Contact Mailing Preferences

Remote Sales

Using the Remote Sales function enables sales personnel located in distant places to interact with the central database. This ensures that the latest data is available to both off-site and on-site personnel to further streamline sales efforts.

Remote Sales can be installed on the computers of sales personnel working remotely from standalone systems. Through these standalone systems, remote users can synchronize data with the central QAD CRM database, as shown in the figure below.

Fig. 1.5
Remote Sales



In the stand-alone system, data is stored in a local single-user database. This database is referred to as the remote node. The host node is the central database. Remote nodes can synchronize data with the host node to make the latest information available to both on-site and off-site users.

Remote Sales interacts with the modules of both Sales Management and Marketing Management.

Data Synchronization is the most important function of Remote Sales. This module helps sales personnel working off-line synchronize their data with the central system. It provides features to:

- Set up the remote node to link with the host node.
- Manually load data from, and dump data to, the central server.
- Display data received from the host node.
- Automatically upload or download the latest data.

You must register remote nodes and set data synchronization as required.

Integration with QAD Enterprise Applications

You can integrate QAD CRM with the QAD ERP application. You can configure this switch-based integration according to your requirements by specifying the modules you want to integrate. You can also control the data flow and other behavior.

The data synchronization is automatic. Database and session triggers update the data, and fields of the integrated tables are mapped. For some modules, the system uses user-defined fields to store QAD ERP fields. These user-defined fields are loaded automatically when integration is switched on. These fields are predefined and created specially for the purpose of integration.

QAD CRM works with multiple QAD ERP application user interfaces. It can successfully integrate with both QAD Desktop and the QAD .NET user interface.

You can integrate the following modules:

- Product
- Address
- Sales Quote
- Sales Order

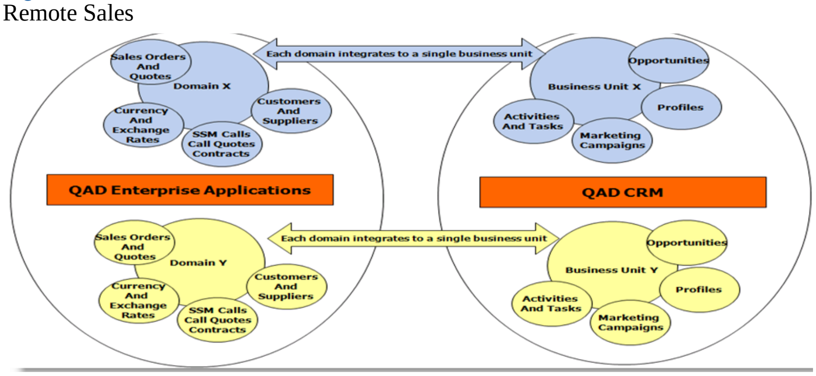
- Installed Base
- Call
- Contract
- Contract Quote
- Call Quote
- Multiple Currency
- Users

Working With Multiple Domains and Business Units

In implementing QAD domains in QAD CRM, the approach was taken to extend the usage of business units in CRM to assume the domain function. (In versions of CRM prior to 6.3, there was an indirect mapping between a single Enterprise Applications domain and a single CRM business unit.) However, the underlying assumption in CRM is that every domain in Enterprise Applications will map directly to a business unit in CRM of the same name. This mapping is created when CRM is installed and whenever a new domain is created in Enterprise Applications or a non-active domain is activated.

This can be seen diagrammatically as follows:

Fig. 1.6
Remote Sales



This diagram also helps to illustrate the fact that most master data and all transactional data in QAD CRM is segregated by business unit. So Profiles, Opportunities, Activities and Marketing Campaigns all relate to a business unit. When sales orders or SSM calls are raised and they are passed to CRM via the integration, they are associated with the domain of their origin. This becomes the business unit that they reside in within QAD CRM.

The few exceptions to this rule are primarily system-wide configuration data such as Users and Integration Control files.

In common with domains in Enterprise Applications, when users are logged on to the system the data that they can see is confined to the business unit that they have logged on to. If they need to review or update data from another business unit, they need to re-logon to the other business unit.

Integration with Microsoft Exchange Server

QAD CRM provides functionality to send and receive e-mail messages through the system, and maintain details of contact persons and activities. These features are further expanded through system integration with enterprise messaging and collaboration applications.

Currently the system integrates with the Microsoft Exchange Server. Future versions are planned to support other messaging applications as well.

Using the Exchange Server Integration module, you can:

- Synchronize activities (of type Appointment and Task)
- Synchronize contacts
- Synchronize mail

QAD Admin Service helps QAD CRM communicate with Exchange Server. You must specify accurate Admin Service settings that the applications can use for successfully communicating with each other.

For successful integration, system users must be associated with Microsoft Exchange Server mailboxes. You can set up these mailboxes and associate them with users. For information on setting up Microsoft Exchange Server integration, see *Administration Guide: QAD Customer Relationship Management*.

Configuring Microsoft Outlook

You need to add a QADCRM category in Microsoft Outlook if your system is configured to require synchronizing all contacts, activities, or tasks categorized in the QADCRM category from Microsoft Outlook to QAD CRM.

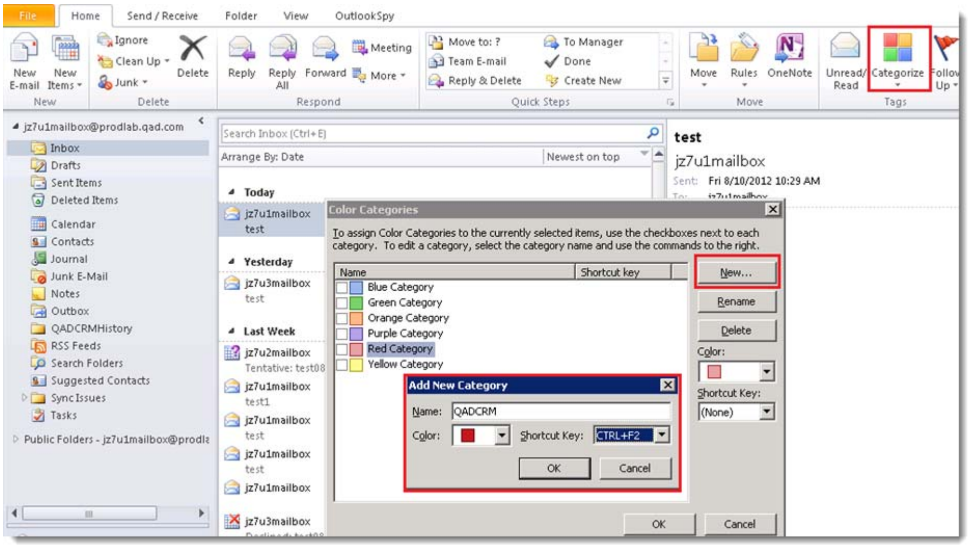
To add a QADCRM category:

1. On the Microsoft Outlook window, click Categorize.

   The Color Categories window displays.

2. Click New to open the Add New Category window.
3. Enter QADCRM in the Name field and select a color and a shortcut key.
4. Click OK.

Fig. 1.7
Create QADCRM Category in Microsoft Outlook



Activity Synchronization

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

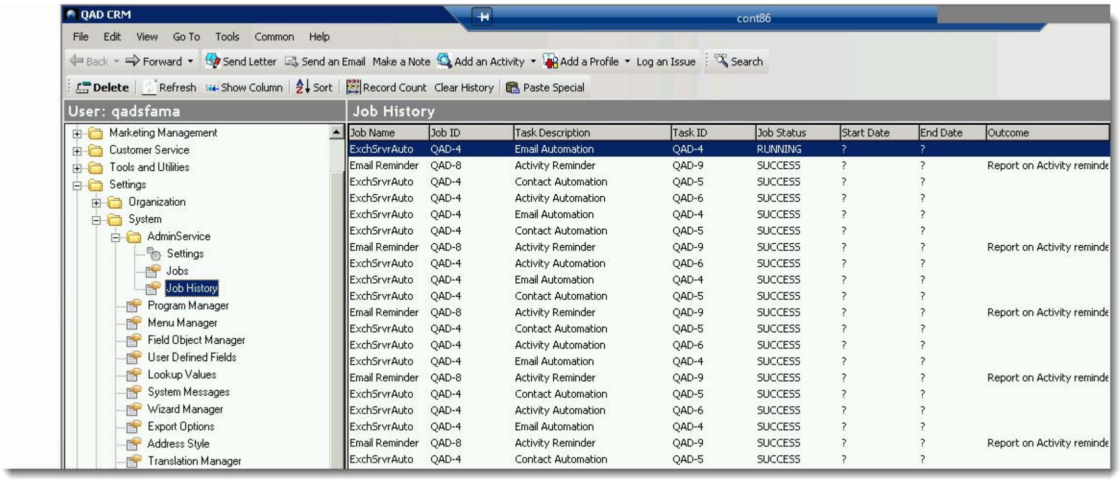
To create an activity (appointment, meeting, or task) in Microsoft Outlook and synchronize it to QAD CRM:

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.

   For information on creating a QADCRM category, see “Configuring Microsoft Outlook” on page 16.
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.

Fig. 1.8
Job History



To synchronize an activity (appointment or task) from QAD CRM to Microsoft Outlook, simply create the activity and it will be automatically synchronized to Outlook the next time the activity synchronization job is run.

Contact Synchronization

Contact information is shared between Microsoft Exchange Server and QAD CRM if the integration with Microsoft Exchange Server is enabled. Depending on the synchronizing policies, the Contacts information can be synchronized in a bi-directional manner either manually or automatically.

The system administrator maintains the synchronization polices on the Contacts tab in Settings|Mail Server Integration|Settings and Switches.

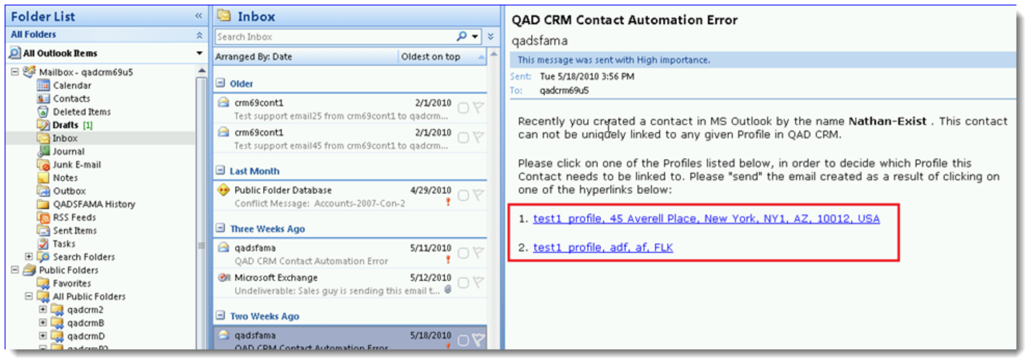
How Contact Synchronization Works

In the system, contacts are associated with profile records. The profile name must match the company field of the contact record of Microsoft Exchange Server.

During contact details exchange between Microsoft Exchange Server and QAD CRM, QAD AdminService first determines if the company name matches a profile name in the system. If it does, QAD AdminService updates the record.

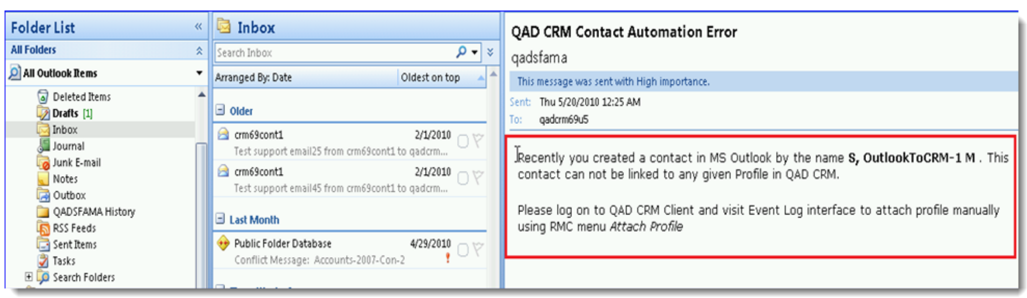
If QAD AdminService finds multiple profile instances, it composes and delivers an e-mail message with the matching records to the user who created the contact record. The records in this e-mail message are hyper-linked. After receiving a message, the user can click the profile record to use for synchronization.

Fig. 1.9
Contact Automation Error - Multiple Profiles Found



If QAD AdminService cannot find a profile record that matches the company, it creates an entry in the event log. Users can attach a profile to such contacts from the event log facility of the system.

Fig. 1.10
Contact Automation Error - No Profile Found



To attach a profile to a contact from the event log in the system:

1 Choose Main Menu|Tools and Utilities|Event Log.

2 Expand Contact Synchronization.

3 Right-click the event log record and choose Attach Profile.

4 Find and select the profile or add a new profile. Then click OK.

Synchronizing Mail

Exchange Server integration stores references to all e-mail messages sent to and received from a contact that exists in QAD CRM as part of the activity history against that contact. After synchronization, you can view the contact person activity history in QAD CRM.

When you create a mail message in Outlook, if the mail ID in the To field matches a contact in CRM, a history record is created for the contact. If no unique contact is found, an error record is created in the event log. Select a record and choose Attach Contact to resolve the problem.

Exchange Server Integration with Remote Sales

For Remote Sales, integration with Microsoft Exchange Server is realized through the Host Node. You use the same steps to configure the host node to integrate with Exchange Server as for any other machine. No additional setup is required.

When implemented, Remote Node data is first synchronized with the Host Node, then with Exchange Server. Any data updated in QAD Remote Sales is not synchronized with your Microsoft Outlook client until QAD Remote Sales is synchronized with the Host Node. Similarly, any updates made in Microsoft Outlook client are not reflected in QAD Remote Sales until the next synchronization with the Host Node is performed.

Chapter 2

Getting Started

This section describes the system interface, common functions, login process and password change procedures for the QAD Customer Relationship Management (QAD CRM) system. It discusses the following topics:

Logging In and Out 22
Explains how to log in and out.

Using the User Interface 23
Describes the UI screen layout, how to navigate, and how to use the toolbar buttons.

Working with Data 25
Discusses how the UI can be used to work with data, with sections on common buttons in the data screens, common icons, and look-up tables and data validation.

Using Common Functions 29
Describes how to use common functions, including sending letters and e-mails, making notes, adding activities and profiles, and logging support issues.

Using Help 34
Explains how to access the online help.

Users, User Groups, and Teams 34
Discusses how the CRM system lets you define users and form user groups and business units or teams.

Changing Your Password 34
Explains how to change passwords.

Logging In and Out

This section describes the system login and logout procedures.

Logging In

1 Click the system icon on your desktop to start the QAD CRM application. The log-in window displays.

2 Enter your user name in the User ID field.

Fig. 2.1
Log In screen

3 Enter your password in the Password field.

4 In the Application Language field, enter the language in which you want to work with the system. The system supports multiple languages. If you specify the language, it appears in the Log-in screen by default.

Note Your user profile also lets you set the system default language if it is not specified here.

5 Click OK.

6 If you select OK in the previous step, another window displays. From the Log On To drop-down, select the company you want to log in to.

7 Select the menu you want to see through the Use Menu drop-down.

Note The Log On To and Use Menu drop-downs display only if you are allocated multiple companies and multiple menus.

8 Click OK.

Logging Out

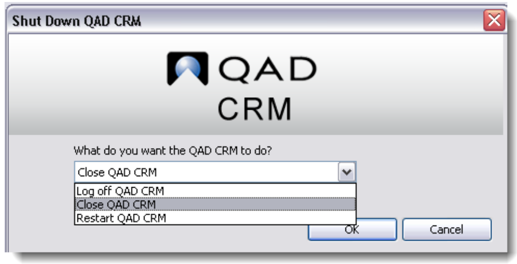
You can log out of the system by selecting the File|Exit option from the main menu bar. An alternative method to log out of the system is described below.

1 Click the Windows Close button on the top-right corner of the system screen. The system shutdown window displays.

2 Select Close, Log off, or Restart from the drop-down.

Note After you log off, this command changes to Login. This lets you log in as another user without closing the system interface.

Fig. 2.2
Log Off Screen



3 Click OK.

Using the User Interface

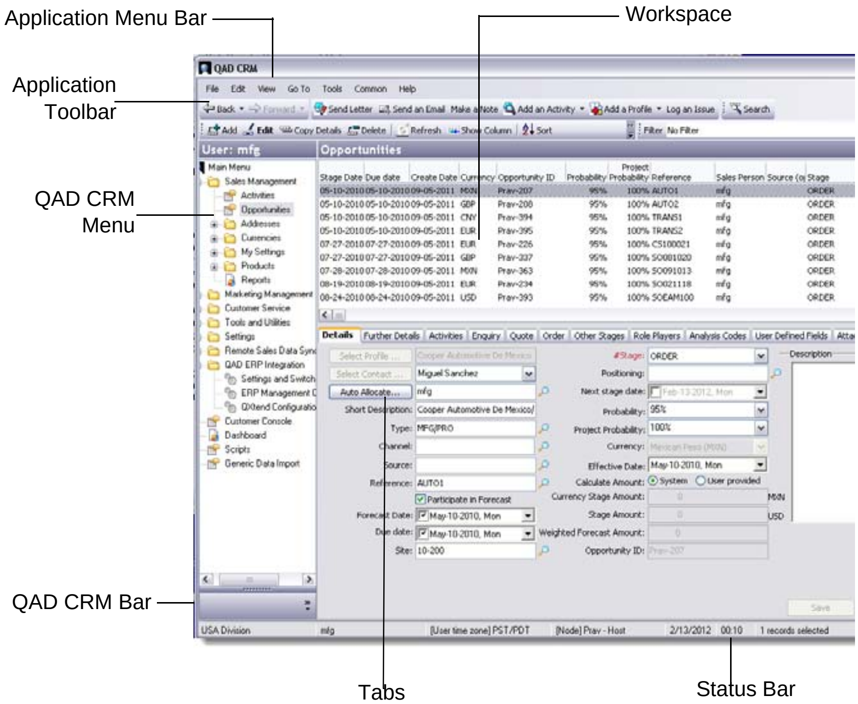
This section describes how to use the user interface.

Screen Layout

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

- Application menu bar
- Application toolbar
- QAD CRM menu
- QAD CRM bars
- Workspace
- Tabs
- Pop-ups

Fig. 2.3
Main Screen



You can resize the menu and workspace areas by dragging the vertical resize bar to the right or left. You can also resize the area displaying the bars by dragging the horizontal resize bar up or down.

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. To select multiple records in the browser, hold down the Ctrl key and click the records you want. To select a continuous block of records, click the first record, hold down the Shift key, and then click the last record.

A 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.

Navigation

You can access the assigned modules and sub-modules through the system menu. Menus and menu options are located on the left pane of the application window. This menu structure is also referred to as the tree view. You can expand a menu to view and select its submenus and menu options. In addition to the tree view, the system also provides a drop-down menu panel to let you access functions easily.

Toolbar Buttons

Toolbar buttons provide a shortcut to system features and tasks. The system has a default toolbar and various module-specific toolbars that appear when the relevant modules are selected.

You can configure and customize to your needs. Right-click the toolbar area to select or deselect options. You can hide or display portions of the toolbar depending on the options you select.

If you resize the window—or if all the buttons do not fit in the toolbar panel—a drop-down button displays in the navigation pane. Click this button to view and use buttons that are available but hidden.

Working with Data

When you have records displaying in the main screen, the toolbar lets you navigate between the previous and the next screens, and the displayed records. It also includes buttons to perform common tasks and functions.

Drag your mouse across multiple lines of data to select several records at the same time. Details of the last record in your selection are displayed in the bottom half of the data screen workspace.

On all data screens, when the Save icon flashes on a tab, click Save before you proceed to enter data on any other tab. If you do not save data or changes on a tab, any data entered subsequently on other tabs does not get saved.

Common Buttons in Data Screens

The following buttons are available from all data screens within the system:

Search	Filter	Undo
Replace	Record Count	Add
Refresh	Report View	Edit
Show Column	Export	Delete
Sort	Save	

You can access these options by right-clicking a data screen.

Search

Lets you search and replace field values for browser records. Click this button to open a search toolbar below the QAD CRM toolbar.

Replace

You can also do a conditional search and replace. To do so, you need to select the Replace If check box and specify a condition. Values are replaced only in records that match the condition.

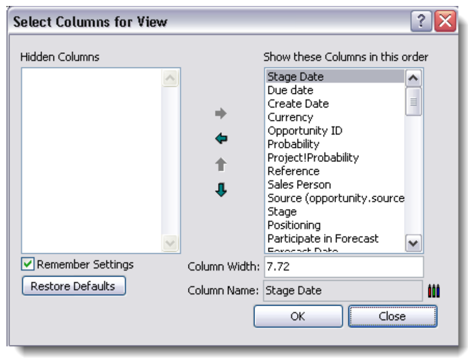
Refresh

Lets you refresh the screen with recent changes that you made to the database.

Show Column

Lets you select the column labels you want displayed when you open a particular menu. You can use the left and right arrow keys to navigate between the browser columns that are hidden or displayed. The up and down arrow keys let you define a sequence for column display.

Fig. 2.4
Select Columns for View

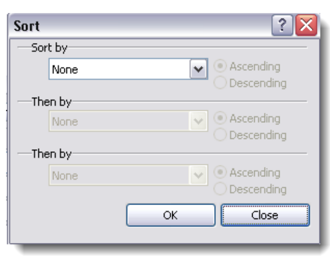


Sort

You can also sort the displayed records in ascending or descending order based on a certain field. For sorting records, click the field name on top of the browser. The system sorts the records in ascending or descending order of the field.

You can also perform multi-level sorting through the Sort window. To use this option, right-click and choose Sort from the menu.

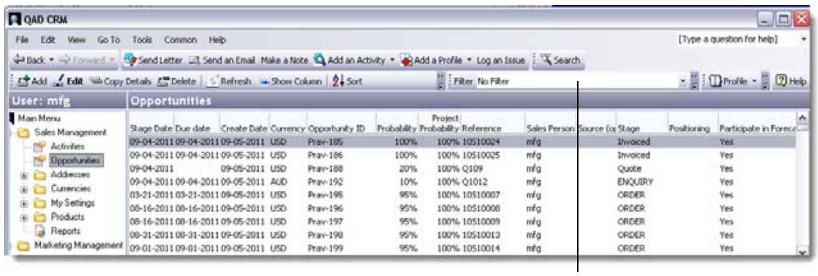
Fig. 2.5
Sort



Filter

Use the Filter drop-down list on the top pane to select a filter for the records displayed in a screen. This facility is available for most modules that display a list of records.

Fig. 2.6
Filter Dropdown



Filter Dropdown

To specify conditions for filtering records, select the Filter option from the File menu. A new screen appears, based on the module you are using, letting you customize filter conditions. As an example, the Profile Filter screen is explained in detail later in this guide (see "Filtering Profile Records" on page 107). Filter options for other modules function on similar lines.

Record Count

Lets you see the total number of records displayed in the current filter.

Report View

Lets you transfer selected or all records into a browser report layout. This option picks up report data from the browser directly.

Note If you select one record and choose this option, the report is generated for all the records in the browser. However, if you select multiple records, the report generated will reflect only the selected records.

For details on reports, see Chapter 11, "Using Reports," on page 137.

Export

Lets you control the output format of your generated report through the Export Wizard. You can export to an application, disk file, Microsoft Exchange folder, mail recipient, or a printer.

Fig. 2.7
Export Wizard

For details on data export, see “Managing Output Channels” on page 146.

Add

You can add a record to the existing database through this option. A blank screen displays with default values filled in. You are required to fill in the relevant fields here. For more details on performing the Add function for each menu, see the related section in this guide.

Edit

You can edit a selected record displayed on your screen through this option. On clicking this option, the cursor automatically moves to the first editable field in the primary tab.

Delete

You can delete a selected record displayed on your screen through this option.The system displays a confirmation prompt before deleting the record.

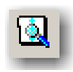
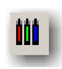
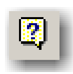
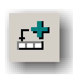
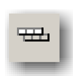
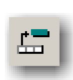
Save or Undo

When you add or edit data in a record, the system displays a Save icon on the corresponding screen or tab, indicating that you must save the record or undo it before you can perform other tasks in the current module.

Common Icons

The table below lists and displays some of the common icons used across all QAD CRM data screens.

Table 2.1
Common Icons

Icon	Action
	Opens a look-up from where you can select relevant values.
	Starts the Search utility.
	Opens the Select Color interface.
	Opens the online help file.
	Adds a new record.
	Copies the selected record.
	Deletes an existing record.

Look-up Tables and Data Validation

The QAD CRM system also provides look-up tables to assist you in adding values in various input fields. You can access each of these tables using the corresponding Look-up button located next to the field.

The system does limited validation on the data you enter in the input fields. Wherever required, the system does not let you enter more than a specific number of characters in fields. It also checks for duplicate records.

Mandatory field names appear in red. If you leave mandatory fields empty, the system displays an error message and does not complete the task you want to perform. You can, however, leave optional fields empty.

Using Common Functions

The QAD CRM interface lets you perform some typical functions across all screens:

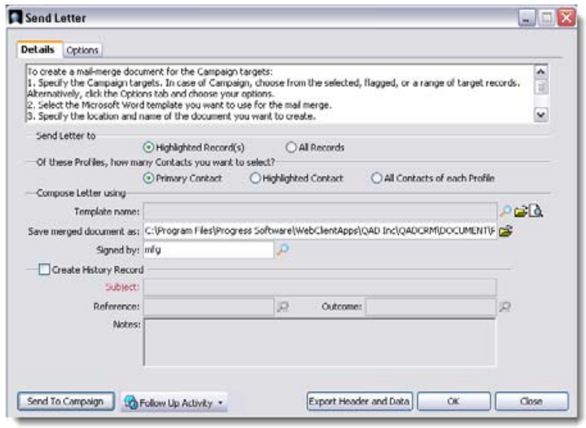
- Send Letter
- Send an Email
- Make a Note
- Add an Activity
- Add a Profile
- Log a Support Issue

Send Letter

Choose this option to create and send a letter, to any selected profile or contact, without specifying an activity for it. When you click this button, the Send Letter window opens.

Note Clicking the Send Letter button works for a single record. To use this option for multiple records, select the records from the browser, and choose Send Letter from the right-click menu.

Fig. 2.8
Send Letter



Go to the Details tab to select the profile, contact, and letter template. Indicate if you want to create a history record by selecting the Create History Record check box.

You can also specify a follow-up activity associated with the letter you are sending. For example, once you send the letter to a contact, you may want to make a telephone call to confirm the receipt. In this case, you can specify a follow-up activity for making a phone call.

The Options tab displays target related statistics. You can specify the sending criteria, and other related details based on the displayed statistics.

Note Letters created through the Send Letter option are generated by the system immediately. However, letters created through the Activity module are generated only when they are processed, depending on their scheduled dates. For more details, see “Managing Activities” on page 59.

Using the Send a Letter facility, you can create Microsoft Word documents (`.doc` files) based on templates. You can select templates available through the Template Manager in the system, or located elsewhere on your local or networked computer. Templates include the required format, and all information and fields required to create a letter. When a letter is created, typically, the fields in the document are merged with information of the record for which you perform this activity.

Send an E-mail

Choose this option to send an e-mail to a selected profile or contact. When you click this button, the Select Compose Screen pop-up opens.

On the Select Compose Screen pop-up, you can select the e-mail client you want to use. To use the selected client for future mails, leave the check box clear. To choose the mail client every time, select the check box.

The system lets you save a record of the e-mails you send as part of the selected profile's transaction history. To include a reference to your e-mail in the profile transaction history, go to My Settings|Preferences and select the required option.

Note When you send an e-mail through the Activities module, it automatically gets included in the profile transaction history, even if you have selected otherwise in My Settings|Preferences.

Make a Note

Notes are a useful method of taking down vital information regarding a particular profile or contact. Notes get updated to the Transaction History for that profile, and can be referred to at a later date.

When you click this button on the toolbar, the Make a Note window displays. In this window, select the Profile or Contact for whom you want to make a note.

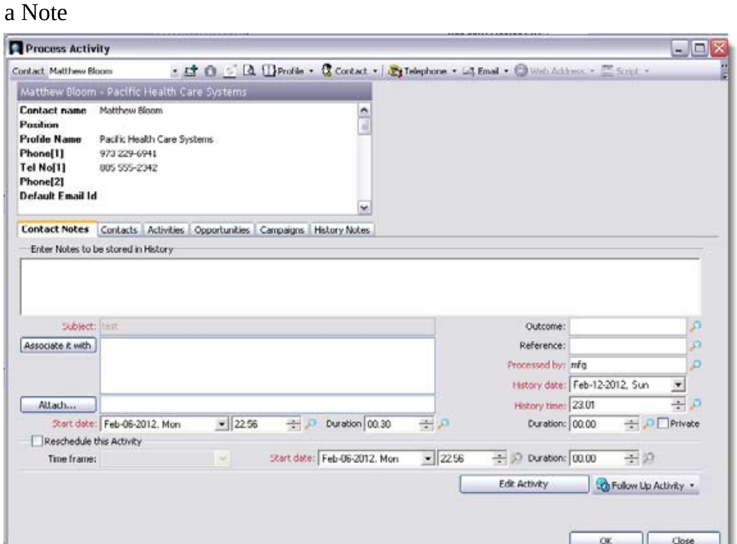
The Make a Note window also lets you perform the following functions:

- Add contact details for a new contact
- Refresh Profiles and Contacts information
- Set up user preferences for view columns
- Add attachments and make associations
- View profile details for selected profile
- View contact details for selected contact
- Add opportunity
- Insert selected details or an imported file
- Check spelling and grammar

Note Press F7 to invoke the spelling and grammar check option. This option is available only for text-based fields. The system displays a confirmation message when the check is complete.

Once you make a note and save it, you can view it from the Profiles module in Activities|History.

Fig. 2.9
Make a Note



The Make a Note window contains the following tabs:

Table 2.2
Make a Note Tabs

Tabs	Action
Contact Notes	Add your notes for the selected profile in the Contact Notes tab. Various look-ups are available to help you create note details. You can assign a follow-up activity, if required, by clicking on the relevant button at the bottom right. You can also mark a note as private by selecting the Private check box.
Contacts	View information related to the contacts of the selected profile here. This tab also lets you add or edit a contact.
Activities	View the activities associated with the contacts of the selected profile here. Two views at the bottom of this window let you view both planned activities and activity history.
Opportunities	View the opportunities associated with the selected profile here. The views at the bottom right let you add descriptions and opportunity lines.
Campaigns	View the campaigns associated with the selected profile here.
History Notes	View associated history notes for the contact.

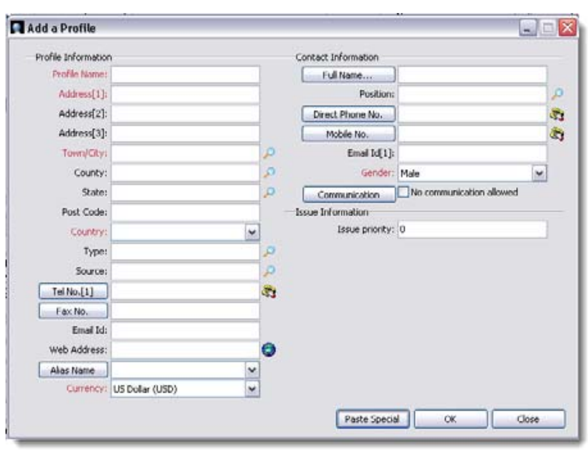
Add an Activity

For details, see Chapter 5, “Maintaining Activity Types,” on page 60.

Add a Profile

There are two methods to add a profile: Quick Profile and Detailed Profile. If you select Quick Profile from the Add a Profile list box, the Add Profile screen displays.

Fig. 2.10
Quick Profile



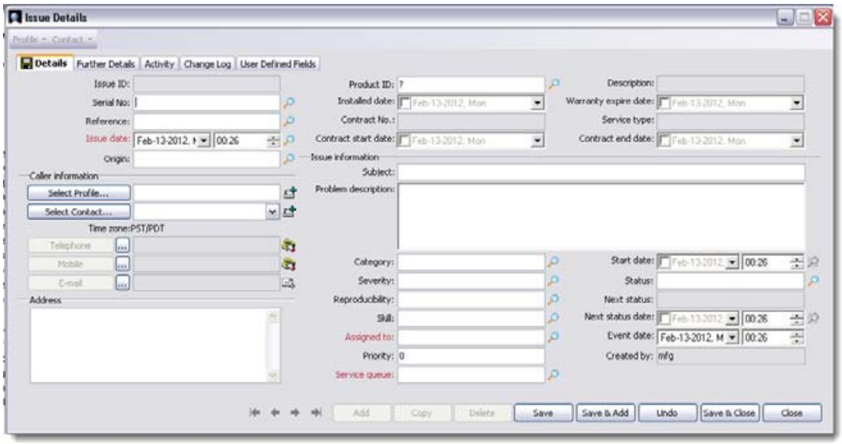
This screen lets you add basic information for a new profile you create. You can later add detailed information for the same profile through the Profiles module.

For details, see Chapter 7, “Working with Profiles,” on page 96.

Log a Support Issue

This option lets you record details of a support issue from any place in the system. When you click this button, the Issue Details screen opens in add mode.

Fig. 2.11
Issue Details



The Issue Details screen contains the following tabs:

Table 2.3
Issue Details Tabs

Tabs	Action
Details	To add issue details, start by using the look-ups on the Details tab for an existing profile or contact. Otherwise you can add a new profile or contact through the buttons provided.
Further Details	You can record additional issue details in this tab. It also lets you add attachments and record the issue duration.
Activities	You can view the activities associated with the issue here. Two views at the bottom of this window let you view both planned activities and issue history. You can also add a new activity associated with this issue, if required. To enable the Add option in the Activities tab, ensure that all information entered previously in other tabs has been saved.
Change Log	This tab displays a log of those fields for which auditing option is enabled. The fields that display in this log depend on the settings made by your system administrator. You can change the settings from the Customer Service module.
User-Defined Fields	You can view and update the user-defined fields created for this particular issue through this tab.

The toolbar of the Issue Details screen lets you perform the following functions:

- View profile details for selected profile
- View contact details for selected contact

This toolbar is enabled only after you put in required profile or contact information in the Details tab and save it.

Using Help

Online help can be accessed through the help button in the system toolbar, located in the upper-right corner of the main screen. There is also a text box above the Help button where you can enter a specific question, and the relevant help file for your query is displayed in a separate window.

Users, User Groups, and Teams

The QAD CRM system lets you define users, and form user groups and teams according to the specific requirements of your organization.

If a company has multiple businesses, these can be classified as different Business Units, with each unit representing a separate enterprise. Each of these units can then have multiple users and teams, with varied permissions granted to them. Such user or team level permissions and menu access can be set from the Menu Manager available in Settings|System.

For more details, see the Settings module of *Administration Guide: QAD Customer Relationship Management*.

Changing Your Password

The system administrator provides you with a user name and password after creating your user profile. You should change your default password the first time you log in to the system. To ensure data security it is recommended that you change your password periodically.

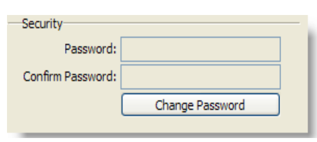
Use the Details screen to change your system password. Your new password will take effect when you log in again to the system.

Note The system administrator determines your ability to change passwords.

1 Choose Sales Management|My Settings|Details. The Details screen displays.

2 Click the Change Password button near the bottom of the screen.

Fig. 2.12
Change Password



3 The Password and Confirm Password fields are enabled.

4 In the Password text box, enter your new password. The entered text is displayed masked as asterisks (*).

Note Passwords are case sensitive, so strings like “abc” and “ABC” will be treated as two different passwords.

5 In the Confirm Password text box, enter your new password again.

6 Save your password. The system displays a confirmation message.

Chapter 3

Defining Preferences and Settings

This section describes setting general preferences when working with the system, defining appearance settings, and maintaining personal profile details. It discusses the following topics:

Setting General Preferences 36
Outlines the contents of the Preferences screen and discusses how to set e-mail, report, regional, and activity settings.

Defining Appearance Settings 41
Explains how to use Tab Control, Command Bars, Task Panel, Report Control, Shortcut Bar, Shortcut Caption, and Pop-ups to customize the appearance and behavior of system features.

Maintaining Personal Details 45
Explains how to use the Details screen.

Setting General Preferences

You can set your own personal preferences within the working environment on your machine by using Preferences in Sales Management|My Settings or Marketing Management|My Settings.

Note The ability to define general preferences is determined by your system administrator.

The Preferences screen contains several tabs:

- General
- Email
- Profile find cursor
- Report Settings
- Regional Settings
- Activity Settings

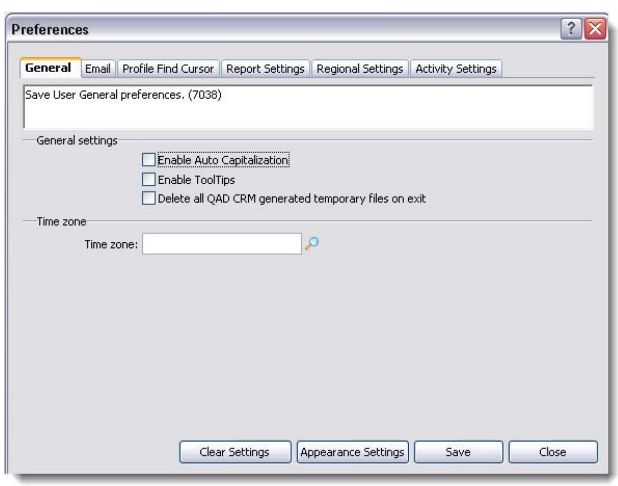
After defining your preferences you must exit the system and log in again to activate them.

General

Use the General tab to define general user preferences, such as auto capitalization, tool tips use, time zone, and so on. You also can define the appearance and behavior of certain system features; for details see “Defining Appearance Settings” on page 41.

To clear any settings you have defined, click the Clear Settings button.

Fig. 3.1
Preferences - General Tab



1 Define general settings as required.

Enable Auto Capitalization. Select this option to automatically capitalize the first letter of words entered into freeform text fields the system.

Enable Tooltips. Select this option to have a Tooltip display every day you log in to the system.

Delete temporary files on exit. Select this option to have temporary files deleted when you log out from the system. It is recommended you select this option in order to optimize your disk space.

2 Enter your time zone. This time zone setting is used by the Users module.

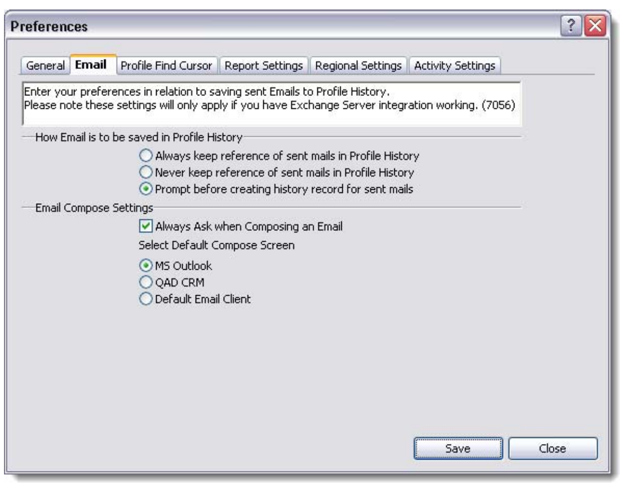
Note Different modules within the system use different time zones. For example, some modules use local time settings, and others use Greenwich Mean Time (GMT). The time zone entered here is given priority when the time is calculated for an activity; tasks use local time settings.

Email

Use the Email tab to define general user e-mail preferences, such as how e-mail is saved and composition settings.

Note To define e-mail templates, use the Emails feature in the Template Manager folder. For details, refer to *Administration Guide: QAD Customer Relationship Management.*

Fig. 3.2
Preferences - E-mail Tab



1 Define e-mail save settings as required.

Always keep reference of sent emails. Select this option to retain references of e-mail messages sent to profile organizations.

Never keep reference of sent emails. Select this option to never retain references of e-mail messages sent to profile organizations.

Prompt before creating history record. Select this option to have the system display a prompt before storing references to e-mail messages sent to profile organizations.

A history record is a transaction history associated with sending e-mail messages. For details on history records see “History” on page 63.

2 Define e-mail composition settings as required.

Always ask when composing an email. Defines whether the system prompts you to select an e-mail client when you send an e-mail.

Yes. You are prompted to select the e-mail client for composing and sending e-mails whenever you send an e-mail.

No. The option you selected in Select Default Compose Screen is used as the e-mail client when you send an e-mail.

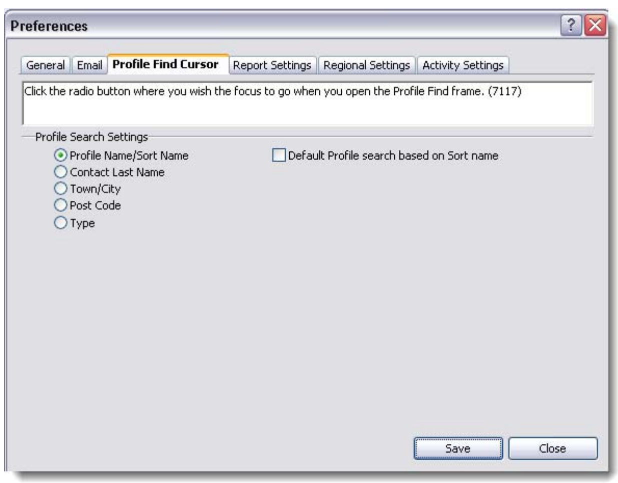
Select Default Compose Screen. Select the UI style of the e-mail composition screen.

- MS Outlook. Select this option to invoke Microsoft Outlook as your e-mail client.
- QAD CRM. Select this option to make QAD CRM your e-mail client to compose and send e-mails. This option is used on customer sites where Microsoft Outlook is not available.
- Default e-mail client. Select this option to invoke the mail client that has been registered on your computer as the default e-mail client. This option is used on customer sites where there is a preferred e-mail client other than Microsoft Outlook.

Profile Find Cursor

Use the Profile Find Cursor tab to define preferences for the Profile Find screen. Select an option to indicate where the cursor should be placed when this screen is opened.

Fig. 3.3
Preferences - Profile Find Cursor Tab



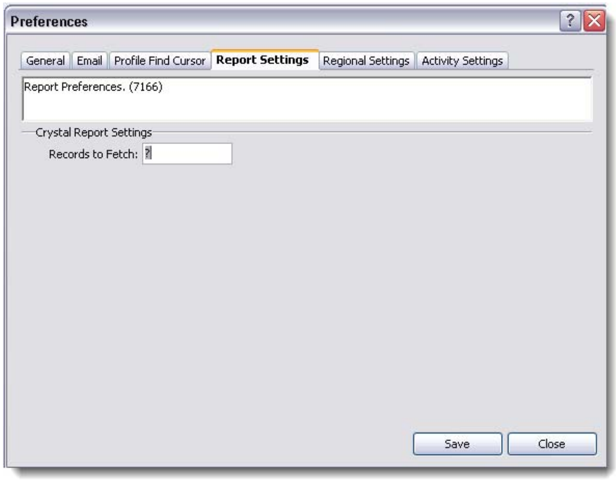
Profile Search Settings. Select an option to specify the focus location when the screen is opened.

Report Settings

Use the Report Settings tab to define the number of records that should be fetched when a Crystal Report is run.

For details on reports see Chapter 11, “Using Reports,” on page 137.

Fig. 3.4
Preferences - Report Settings Tab

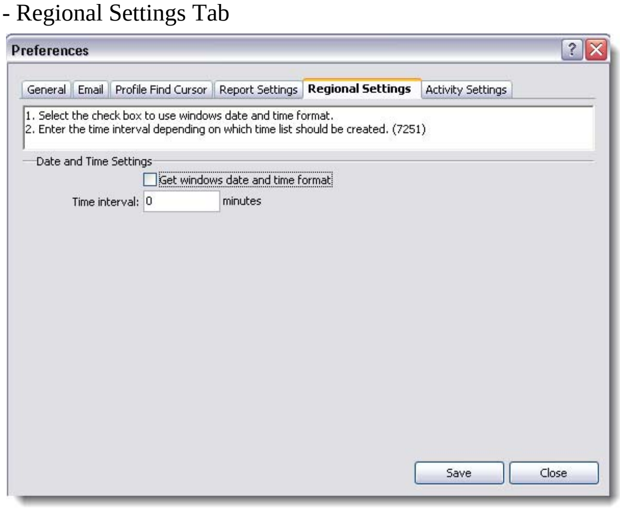


Records to Fetch. Enter an integer value to indicate the default number of records a Crystal report should fetch when run.

Regional Settings

Use the Regional Settings tab to define preferences for date and time format, and for time interval.

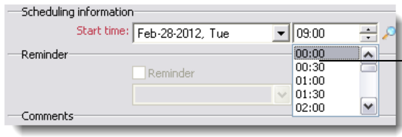
Fig. 3.5
Preferences - Regional Settings Tab



Get Windows Date and Time Format. Select this option to use the Microsoft Windows format for dates and times displayed in the system.

Time Interval. Enter a value to use for time intervals to use on the time drop-down listbox in the Scheduling Information area of the Details tab. For example, enter 15 to use the time format *h*:00, *h*:15, *h*:30 and so on. The default interval is 30.

Fig. 3.6
Time Interval on Time Drop-Down Listbox



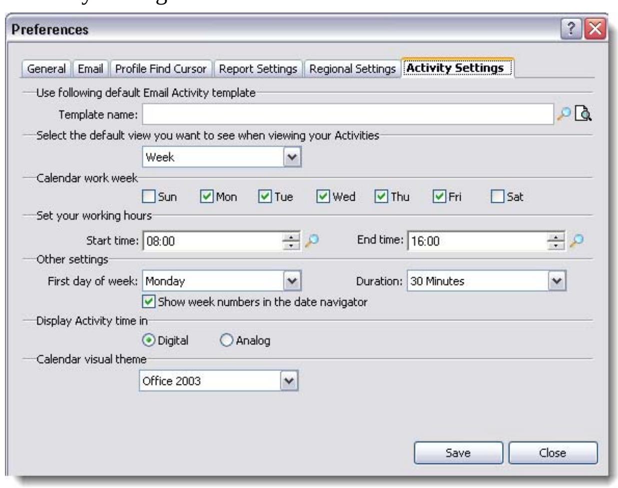
The Time Interval setting controls time increments.

Activity Settings

Use the Activity Settings tab to define preferences for working with activities and the calendar. You can define the calendar default view, working hours, time formats, visual theme, and so on.

For details about working with activities, see Chapter 5, "Working with Activities, Tasks, and E-mails," on page 55.

Fig. 3.7
Preferences - Activity Settings Tab



Template Name. Select the default e-mail activity template to use.

Activity Default View. Select the default view to use when viewing your activities.

Calendar Work Week. Select the days to include in a calendar work week.

Working Hours. Specify the Start Time and End Time of a regular working day.

Other Settings. Specify other settings as required.

First Day of Week. Select the day that a week should begin with.

Duration. Select the granularity to use when viewing a specific day on the calendar.

For example, selecting a duration of 15 minutes means that each hour of the Day view is broken into four 15-minute portions. Each portion can be selected individually.

Show Week Numbers in Date Navigator. Select this option to display the week numbers.

Display Activity Time. Select the Digital or Analog option to specify the activity time format.

Calendar Visual Theme. Select a visual theme for the calendar.

Defining Appearance Settings

Use Appearance Settings to control the appearance and behavior of various system features such as command bars and popup windows by using the following tabs:

- Tab Control
- Command Bars
- Task Panel
- Report Control
- Shortcut Bar
- Shortcut Caption
- Pop-ups

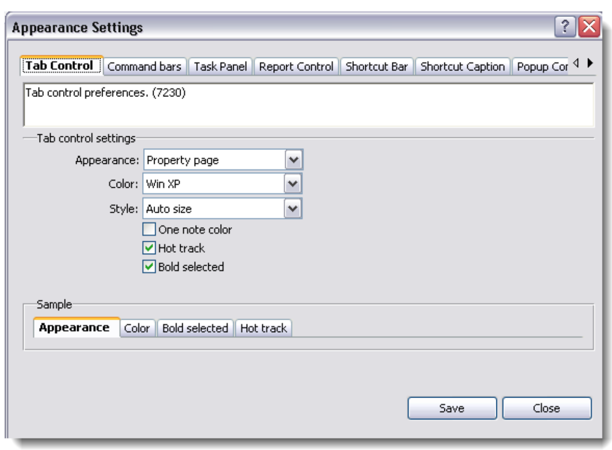
To access the Appearance Settings dialog box, click the Appearance Settings button on the General tab of the Preferences box.

Note To restore your default appearance settings, click the Clear Settings button.

Tab Control

Use Tab Control to control the appearance (color and style) of screen tabs. Use the Sample area as a visual guide of how tabs will appear when your selections are applied.

Fig. 3.8
Tab Control



Appearance. Select a visual style for tabs using the sample at the bottom of the screen as a visual guide.

Color. Select a color for tabs.

Style. Select one of the following styles for tabs.

Fixed. Displays tabs using a fixed size. Some tab labels may be truncated.

Auto size. Displays tabs according to the size of their label.

Compressed. Displays the selected tab full size and minimizes the other tabs.

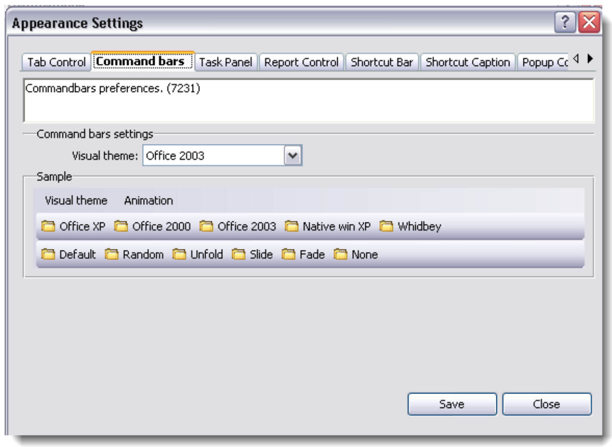
Hot Track. Select this option to have the cursor location on a tab indicated by a color.

Bold Selected. Select this option to cause the text to appear bold on the tab that is selected.

Command Bars

Use Command Bars to control the appearance of the command bars. You can select one of several different visual themes. Use the Sample area as a visual guide for the available themes.

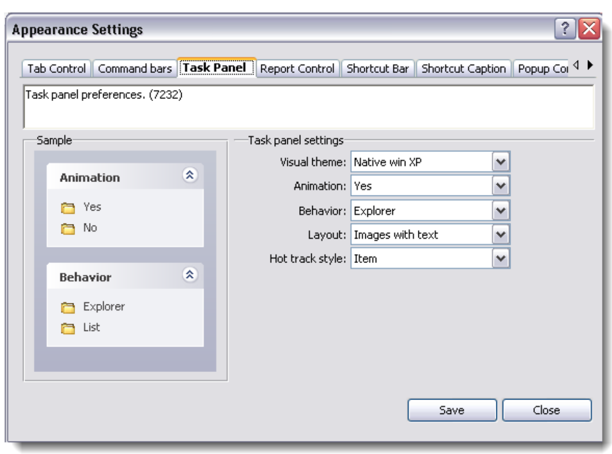
Fig. 3.9
Command Bars



Task Panel

Use Task Panel to control the appearance and behavior of task panels. Use the Sample section as a visual guide of how task panels will appear when your selections are applied.

Fig. 3.10
Task Panel



Visual Theme. Select a visual theme for the bars.

Animation. Specify an animation style for hiding and revealing the task panels when the Hide/Reveal control is used.

Yes. Hiding or revealing tasks is performed using animation.

No. Hiding or revealing tasks is performed without animation.

System. The settings of the user's system determine the animation behavior.

Behavior. Select a behavior for the task panel.

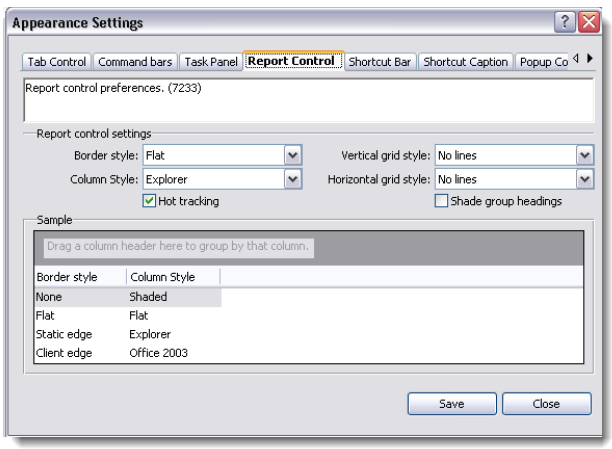
Layout. Select a layout for the images and text for the task pane.

Hot Track Style. Select a hot track style to indicate the mouse cursor position.

Report Control

Use Report Control to control the appearance of reports. Use the Sample area as a visual guide of how reports will appear when your selections are applied.

Fig. 3.11
Report Control



Border Style. Select a style for the borders of reports.

Vertical Grid Style. Select a style for the vertical grids in reports.

Column Style. Select a style for the columns in reports.

Horizontal Grid Style. Select a style for the horizontal grid in reports.

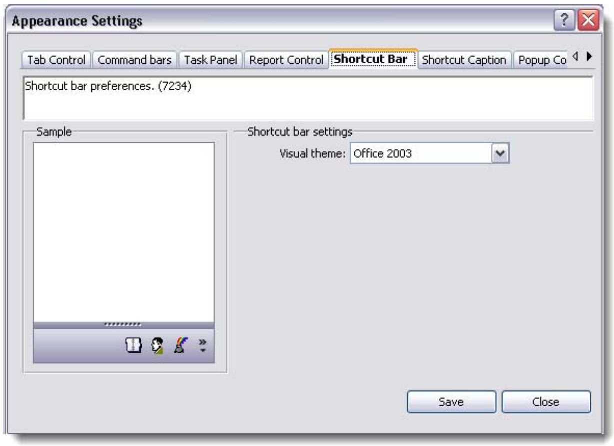
Hot Tracking. Select this option to enable hot tracking in reports. Hot tracking lets you more easily see the position of your cursor in a report.

Shade Group Headings. Select this option to shade group headings in reports.

Shortcut Bar

Use Shortcut Bar to control the appearance of the shortcut bar. Use the Sample area as a visual guide of how the shortcut bar will appear when your selections are applied.

Fig. 3.12
Shortcut Bars

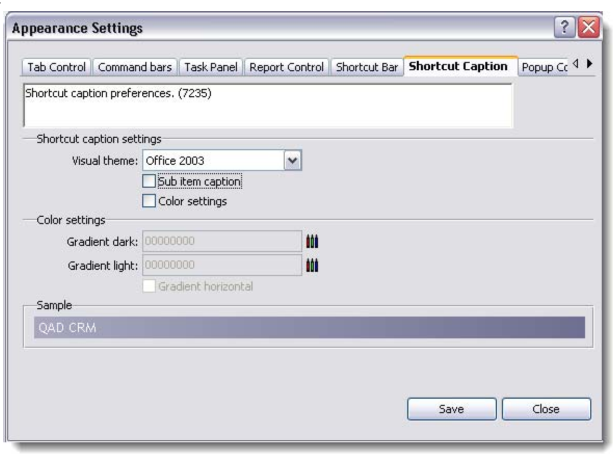


Choose a visual theme to apply to the shortcut bar.

Shortcut Caption

Use Shortcut Caption to control the appearance of the shortcut caption that appears at the top of system screens. Use the Sample area as a visual guide of how the shortcut caption will appear when your selections are applied.

Fig. 3.13
Shortcut Caption



Visual Theme. Select a visual them for the shortcut caption.

Subitem caption. Select this option to reverse the color of the caption text from dark text on a light background to light text on a dark background.

Color Settings. Select this option to specify color settings.

If the Color Settings option is selected, you can specify color settings.

Gradient Dark. Specify a gradient dark by either entering a value in the field or by clicking the icon to the right of the field and selecting a color from the Color box. The gradient dark is the color at the right-hand end of the shortcut caption.

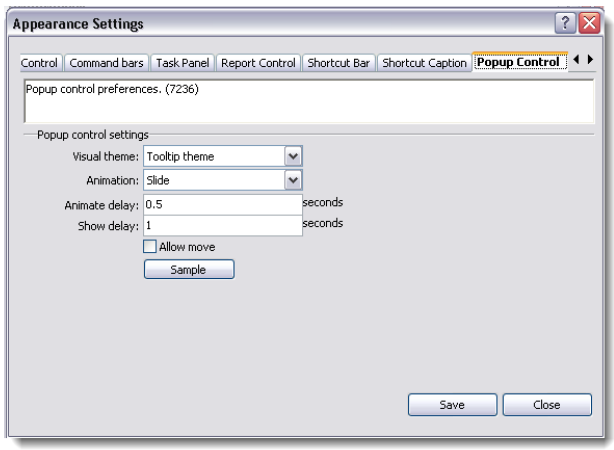
Gradient Light. Specify a gradient light. The gradient light is the color at the left-hand end of the shortcut caption.

Gradient Horizontal. Select this option use a horizontal gradient for the shortcut caption.

Pop-ups

Use Popup Control to control the appearance of Activities pop-ups. Click the Sample button at the bottom of the screen to view how pop-ups will appear when your selections are applied.

Fig. 3.14
Popup Control



Visual Theme. Select a visual them for the popup.

Animation. Select an animation style for the shortcut caption: None, Fade, Slide, Unfold.

Animate Delay. Enter a value to control the delay of the popup window for an activity.

Show Delay. Enter a value to determine the delay between when the button is clicked and the popup window displays.

Allow Move. Select this option to enable the popup window to be moved around the screen.

Maintaining Personal Details

You can record your personal details and maintain the settings for exchange server in the system using the Details feature in Sales Management or Marketing Management—the functionality is the same.

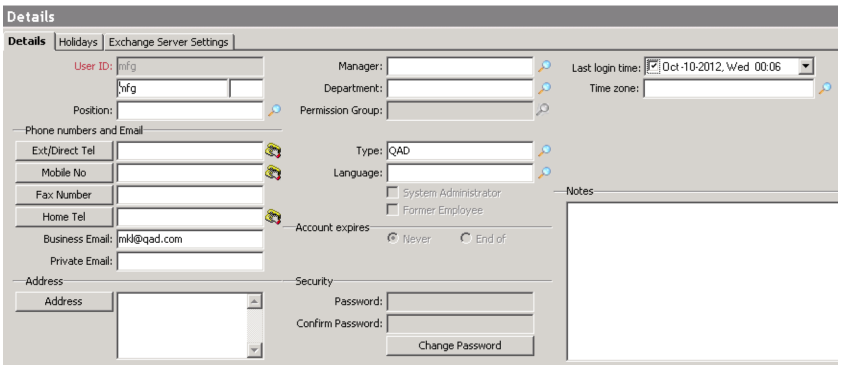
Recording Personal Details

Use the Details screen to maintain your work profile—personal details and contact information, permissions group, and so on.

You also can use this tab to change your password; for details see “Changing Your Password” on page 34.

1 Choose Sales Management|My Settings|Details or Marketing Management|My Settings|Details. The Details screen displays.

Fig. 3.15
Details



2 Enter your position and time zone information as required. This information is used in certain components such as the CSR module and for profiles of internal contacts.

Position. Enter a position defined in the system.

Manager. Enter the name of your manager defined in the system.

Department. Enter the name of the department you belong to.

Permission Group. If permission groups are defined in your system, enter the group you belong to.

Time Zone. Enter the time zone of the location in which you work.

3 Enter your phone number, e-mail, and address information as required.

4 Enter any additional information as required.

Type. Enter a position defined in the system.

Language. Enter the language you will use in the organization.

System Administrator. Select this option to indicate you are authorized to perform system administration duties. This field is available only for users assigned system administrator-level privileges.

Former Employee. This check box is for administrator use.

Account Expires. Indicate your account expiration details.

Never. Select this option to indicate your account will remain valid indefinitely.

End of. Select this option to display a calendar for selecting the date on which your account expires.

5 Change your password if required. For details see “Changing Your Password” on page 34.

6 Enter your holiday information as required. For details see “Holidays” on page 215.

Maintaining Exchange Server Settings

Exchange Server integrated with QAD CRM enables the following data to be shared between CRM and Microsoft Outlook:

- Activities (of type appointment, telephone, letter, and task)
- Contacts
- E-mails

See “Integration with Microsoft Exchange Server” on page 16 for information on the individual integration capabilities.

For each of these integration areas, the system administrator can set system-wide policies that dictate what type of data updates are enabled.

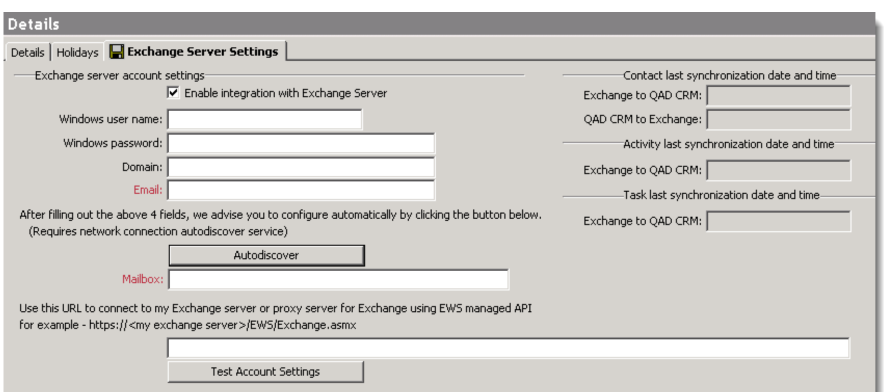
For Activity Synchronization, the user must be authorized by the system administrator to synchronize activities. The system administrator can manage the list of Authorized Activity Synchronization users on the Activity tab in Settings|Mail Server Integration|Settings And Switches.

Ask your system administrator or refer to the tabs on Settings|Mail System Integration|Settings and Switches for details about what updates are possible on your site.

To maintain Exchange Server Settings:

- From Sales Management|My Settings|Details, click Exchange Server Settings tab.

Fig. 3.16
Exchange Server Settings



The following fields require update to complete the integration configuration.

Important Most of the following fields are case-sensitive. Ensure that you have entered the values in the appropriate case before updating.

Enable Integration with Exchange Server. Select this field to enable the integration.

Windows User Name. Enter your Windows login ID.

Windows Password. Enter your Windows login password. Whenever the Windows login password is changed, you need to update this field.

Domain. Enter the domain you log in to at Windows logon. This field is not required if your Exchange Server is hosted externally.

Email. Enter your full e-mail address.

Autodiscover. If your Exchange Server has Autodiscover enabled, this button can be used to automatically populate the Exchange Server Location URL and the Mailbox details.

Mailbox. If not automatically populated by Autodiscover, manually enter the names of your mailboxes in this field

Exchange Server Location. If not automatically populated by Autodiscover, manually enter the URL that identifies the location of your exchange server. You may need to ask your system administrator for the name of your Exchange Server.

Test Account Settings. When all mandatory fields are entered, click this button to send a test e-mail to the specified mailbox to ensure that the integration is successful. The test e-mail is sent in the following format:

Subject - QAD CRM test message

Body - This is an email message sent automatically by QAD CRM while testing the Microsoft Exchange settings for your account.

To confirm a successful configuration of the integration, a message displays on the screen to indicate that this test was successful.

Important If any information associated with the mandatory fields is changed, such as the Windows login password and domain, you must manually update the corresponding fields to ensure that the integration configuration is valid.

Last Synchronization data and time fields. These fields indicate the last synchronization dates and times for the objects identified. These values are initially blank for each user and updated when the synchronization is executed. These fields are helpful in determining where a problem with the integration may have occurred (integration has stopped or been disabled).

Chapter 4

Using Tools and Utilities

This section describes how to use the tools available in the Tools and Utilities menu. It discusses the following topics:

Overview 50
Lists the features of the Tools and Utilities module.

Event Log 50
Explains how to use the Event Log.

Calculator 51
Explains how to use the Calculator.

Run a Program 51
Explains how to run a program.

Overview

The Tools and Utilities module contains the following features:

- Event Log
- Calculator
- Run a Program

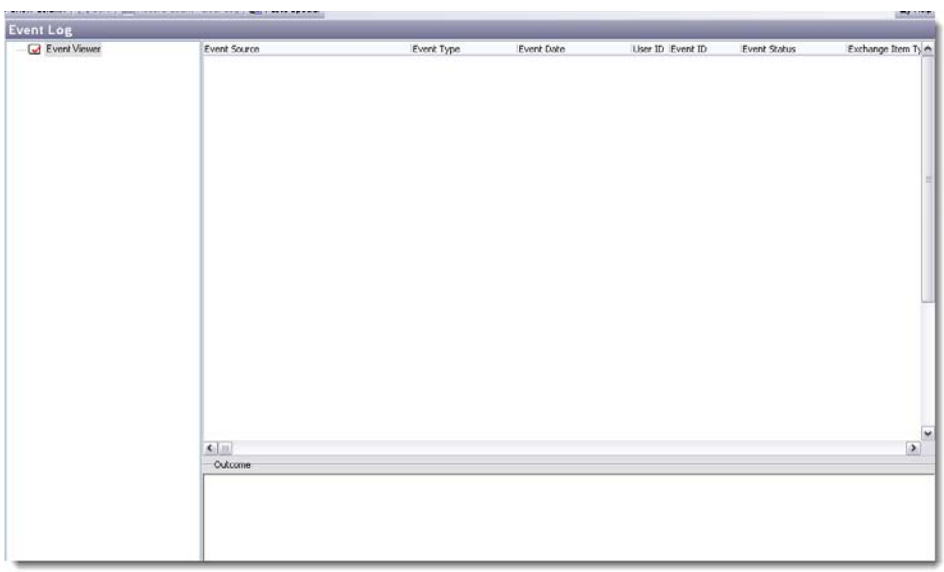
Event Log

Use the Event Log to view logs of events in the system. An event is created whenever a record is created, updated, or deleted. The event log displays three types of event logs—error, information, and warning—created during event processing.

For example, you can view event log records created when the system sends and receives data from Microsoft Exchange during data synchronization.

1 Choose Event Log in the Tools and Utilities module. The Event Log displays.

Fig. 4.1
Event Log



Right-click the Event Viewer to display sort options for events. Right-click the event browser to access other display or search options.

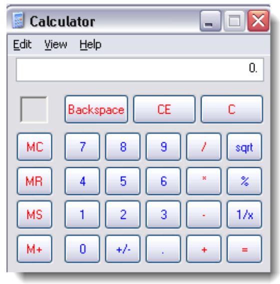
Event logs cannot be edited as they are a record of the system. Individual event logs can be deleted by choosing Delete from the right-click menu. To purge the event log, choose Clear Log from the right-click menu.

The Outcome area at the bottom of the browser displays the outcome of the selected event and the records created or modified by the event.

Calculator

Use the Calculator feature in the Tools and Utilities module to perform standard arithmetic operations using the Windows calculator. For details, use the Help menu on the Calculator toolbar.

Fig. 4.2
Calculator

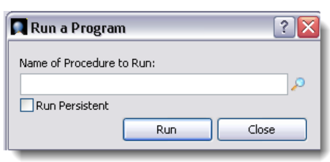


A calculator icon displays near a field on a screen to indicate that the calculator tool is available for that field.

Run a Program

Use Run a Program to execute a specified Progress program (for example, a program with a `.w` or a `.p` extension). You can only run Progress programs using this feature.

Fig. 4.3
Run a Program



1 Enter the name of a program in the Name of Procedure to Run field.

2 To run the program in a persistent mode, select the Run Persistent check box.

Running a program persistently enables other external procedures to access the program.

3 Click Run. The program executes.

Section 2

Sales Management

This section includes information about the Sales Management layer.

Working with Activities, Tasks, and E-mails **55**

Working with Opportunities **73**

Working with Profiles and Contacts **93**

Maintaining Currencies **121**

Maintaining Products **131**

Customer Console **125**

Using Reports **137**

Maintaining the Dashboard **147**

Working with Scripts **153**

Chapter 5

Working with Activities, Tasks, and E-mails

This section describes how to work with activities, tasks, and e-mails. It discusses the following topics:

Overview 56
Explains the uses of the Activities module.

Working with Views 56
Discusses different ways of viewing activities in the Activities calendar.

Modifying Activity Settings 58
Explains how to change activity settings with the Preferences window.

Managing Activities 59
Lists different types of activity settings and discusses how modifications to them are handled in the module.

Maintaining Activity Types 60
Explains how to add activities, process activities, check activity associations, and set up recurrences.

Managing Tasks 67
Explains what tasks are and how to view different types of tasks.

Maintaining Tasks 67
Explains how to use the Task Details window.

Managing Customer Visit Reports 69
Explains how to submit Customer Visit Reports from Microsoft Outlook.

Working with E-mails 69
Explains how to send e-mails from QAD CRM and discusses e-mail synchronization between Microsoft Outlook and QAD CRM.

Overview

In the QAD Customer Relationship Management (QAD CRM) system, Activities are defined as business activities that are scheduled and pre-planned, while Tasks are non-business related activities that you can assign to yourself or to others in your team.

The Activities module of the system ensures that your sales and marketing teams always have the relevant customer, market, and sales information at their fingertips. This module is therefore available in both Sales Management and Marketing Management.

If the integration with Exchange Server is enabled in QAD CRM by the system administrator, you can synchronize activities, tasks, and e-mails between QAD CRM and Microsoft Outlook. Before you run the synchronization, you must configure the Exchange Server Settings. For details, see “Maintaining Exchange Server Settings” on page 47.

Important The synchronization between QAD CRM and Microsoft Outlook is performed through Microsoft Exchange Server. Ensure that you run the synchronization with online Outlook.

Working with Views

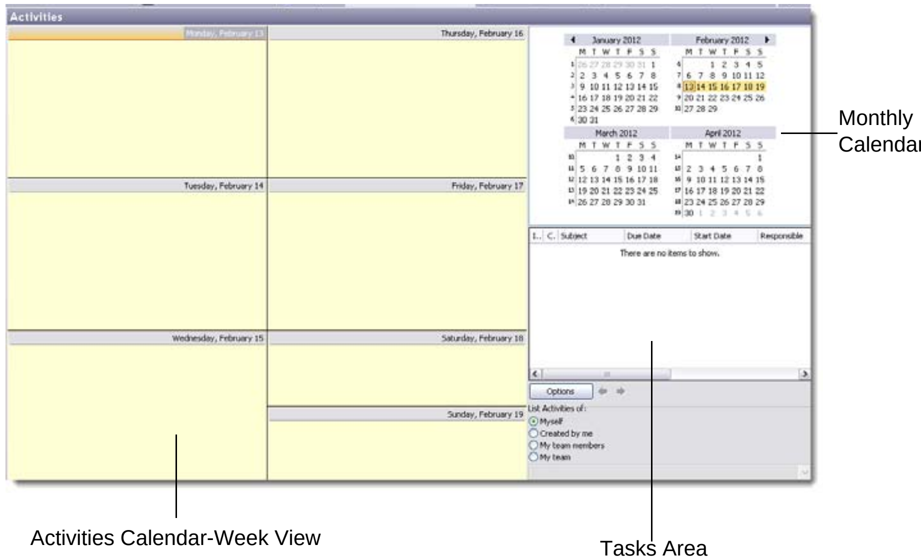
You can schedule and process various types of activities for the profiles and contacts in your database, and set tasks for yourself and others through the Activities module. To access this module, choose Main Menu|Sales/Marketing Management|Activities in the QAD CRM menu.

When you choose Activities from the application menu, the Activities calendar displays in the left portion of the workspace.This calendar display is defined by the view you select. A monthly calendar and the tasks area appear to the right of the main calendar display.

The dates on which some activities have been planned show up in boldface on the monthly calendar. You can navigate to the previous or the next month’s display through the available arrows.

You can also select whether you want to display your own activities or those of others in your team.

Fig. 5.1
Week View in Activities



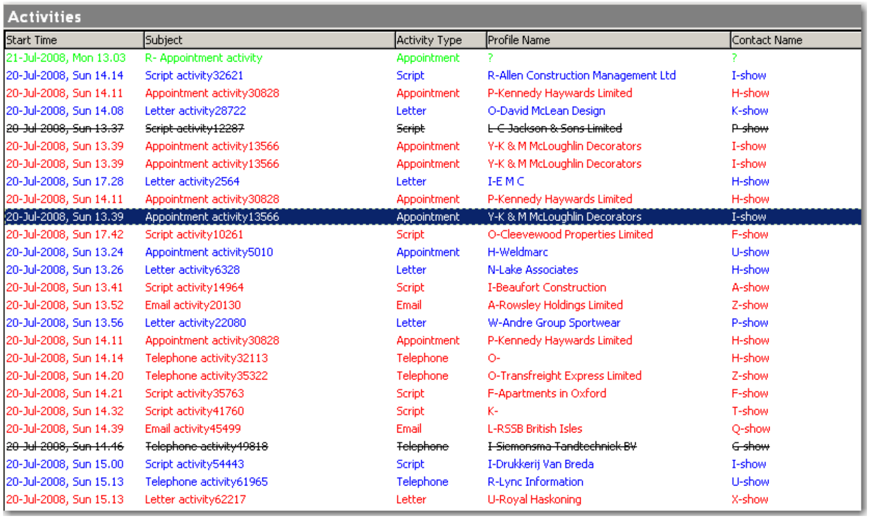
You can view activity records in five different views. The views available are:

- Day: Displays activities scheduled for the selected date
- Week: Displays activities scheduled for the entire week, including the weekend
- Work week: Displays activities scheduled for the five working days in the selected week
- Month: Displays activities scheduled from the selected date through the remaining month
- All: Displays all activity records, irrespective of the day, week, and month

When you display activity records in the All view, the system lets you display filtered records. You can select the appropriate filter from the Filter drop-down list available on the QAD CRM toolbar. For more details on using filters, see “Filtering Profile Records” on page 107.

In the All view, strikethrough format indicates those activities that have already been processed. According to the default settings, red color indicates overdue activities and blue color is for high-priority activities. However, these settings can be changed from Settings|System|System Control|Activity and Reminder Settings. See *Administration Guide: QAD Customer Relationship Management* for details.

Fig. 5.2
All View in Activities


Activities

Start Time	Subject	Activity Type	Profile Name	Contact Name
21-Jul-2008, Mon 13.03	R- Appointment activity	Appointment	?	?
20-Jul-2008, Sun 14.14	Script activity32621	Script	R-Allen Construction Management Ltd	I-show
20-Jul-2008, Sun 14.11	Appointment activity30828	Appointment	P-Kennedy Haywards Limited	H-show
20-Jul-2008, Sun 14.08	Letter activity28722	Letter	O-David McLean Design	K-show
~~20-Jul-2008, Sun 13.37~~	~~Script activity12287~~	~~Script~~	~~L-C Jackson & Sons Limited~~	~~P-show~~
20-Jul-2008, Sun 13.39	Appointment activity13566	Appointment	Y-K & M McLoughlin Decorators	I-show
20-Jul-2008, Sun 13.39	Appointment activity13566	Appointment	Y-K & M McLoughlin Decorators	I-show
20-Jul-2008, Sun 17.28	Letter activity2564	Letter	I-E M C	H-show
20-Jul-2008, Sun 14.11	Appointment activity30828	Appointment	P-Kennedy Haywards Limited	H-show
20-Jul-2008, Sun 13.39	Appointment activity13566	Appointment	Y-K & M McLoughlin Decorators	I-show
20-Jul-2008, Sun 17.42	Script activity10261	Script	O-Cleevewood Properties Limited	F-show
20-Jul-2008, Sun 13.24	Appointment activity5010	Appointment	H-Weldmarc	U-show
20-Jul-2008, Sun 13.26	Letter activity6328	Letter	N-Lake Associates	H-show
20-Jul-2008, Sun 13.41	Script activity14964	Script	I-Beaufort Construction	A-show
20-Jul-2008, Sun 13.52	Email activity20130	Email	A-Rowsley Holdings Limited	Z-show
20-Jul-2008, Sun 13.56	Letter activity22080	Letter	W-Andre Group Sportwear	P-show
20-Jul-2008, Sun 14.11	Appointment activity30828	Appointment	P-Kennedy Haywards Limited	H-show
20-Jul-2008, Sun 14.14	Telephone activity32113	Telephone	O-	H-show
20-Jul-2008, Sun 14.20	Telephone activity35322	Telephone	O-Transfreight Express Limited	Z-show
20-Jul-2008, Sun 14.21	Script activity35763	Script	F-Apartments in Oxford	F-show
20-Jul-2008, Sun 14.32	Script activity41760	Script	K-	T-show
20-Jul-2008, Sun 14.39	Email activity45499	Email	L-RSSB British Isles	Q-show
~~20-Jul-2008, Sun 14.46~~	~~Telephone activity49818~~	~~Telephone~~	~~I-Siemonsma Tandtechniek BV~~	~~G-show~~
20-Jul-2008, Sun 15.00	Script activity54443	Script	I-Drukkerij Van Breda	I-show
20-Jul-2008, Sun 15.13	Telephone activity61965	Telephone	R-Lync Information	U-show
20-Jul-2008, Sun 15.13	Letter activity62217	Letter	U-Royal Haskoning	X-show

Note Tasks and calendar are not displayed in the All view.

Modifying Activity Settings

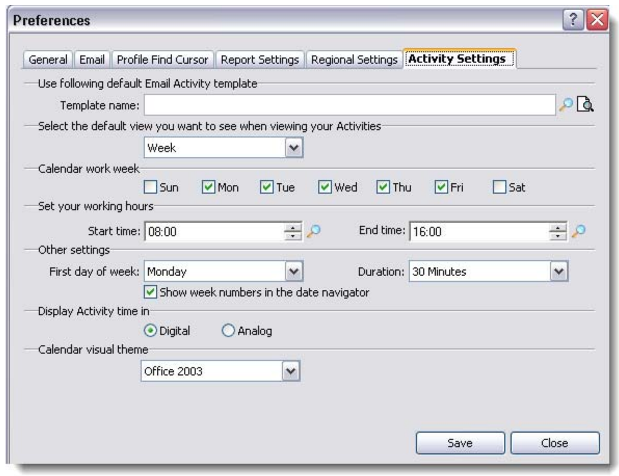
Default activity settings are defined by your system administrator at the time of product installation. However, you can modify the default settings through My Settings|Preferences in the QAD CRM menu.

Select the Activity Settings tab in the Preferences window. Through this tab you can:

- Select a default template for your e-mails
- Set calendar views and working hours
- Select time formats
- Set working days
- Choose a visual theme for your calendar

Note The settings that you save here override those set by the system administrator.

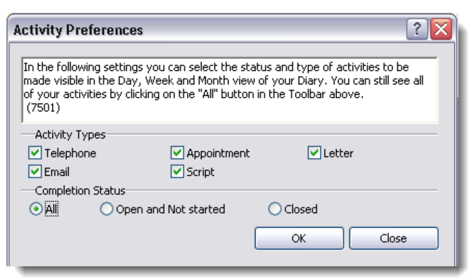
Fig. 5.3
Preferences - Activity Settings



The time zone settings given in Preferences are given first preference when time zone is calculated for a particular activity.

The Preferences button available in the QAD CRM toolbar for this module also lets you set the activity types and completion status of the records you want displayed. This button works only with the Day, Week, Work Week, and Month views.

Fig. 5.4
Activity Preferences



Note The Preferences button is not available for the All view selection.

Managing Activities

An activity for a profile or contact can be recorded from any screen within the system through the Add an Activity button available on the QAD CRM toolbar. Activity types include:

- Telephone
- Appointment
- Letter
- E-mail
- Script

When you create an activity record, it shows up in the workspace calendar on the date it has been planned. After creating an activity, you are required to process it either on or before the scheduled date. Activities that are past due date appear as overdue activities in the calendar.

Note The list of activities and tasks often appears color-coded depending on the settings defined by your system administrator through Settings|System|System Control|Activity and Reminder Settings. You can define different colors for activities and tasks based on whether they are overdue, high priority, or recurring in nature. For details, see *Administration Guide: QAD Customer Relationship Management*.

Managing activity details include adding, editing, and deleting activity records as required. However, you can perform various other operations related to an activity record. For example, you can access profile, contact, and opportunity records.

You can also classify activities as being business-related or personal in nature. To do so, exclude profile and contact details while specifying activity details.

Note You cannot process activities that are not linked to any profile.

The system also lets you specify activity details that other users cannot access. Such activities are called private activities.

Maintaining Activity Types

You can select activity types from the Add an Activity list box on the QAD CRM toolbar. Once you select the activity type, the relevant screen displays.

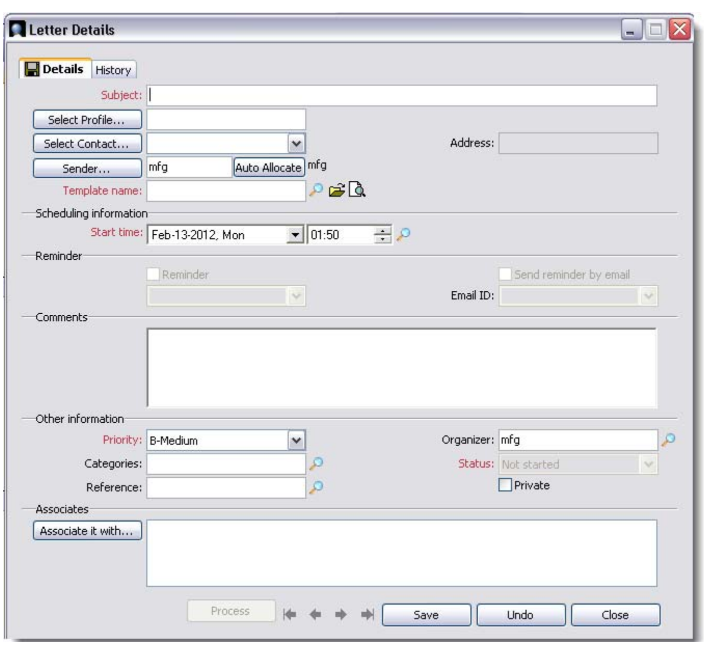
You can also use the Activities module to select and maintain activity types.

Adding Activities

To add an activity, right-click the Activity workspace and choose Add from the menu. Depending on the activity type you select, the appropriate screen displays.

Note This menu also contains options for editing and deleting existing activities.

Fig. 5.5
Letter Details



Details

Use the Details tab to record the details of the activity you are adding.

Select Profile. Select the profile with whom this activity is associated.

Select Contact. Select the contact with whom this activity is associated. If you have already selected a profile, the associated contacts will display in the list box.

Select Caller/Responsible/Sender. Select the person responsible for performing this activity. The field label depends on the activity type you have selected.

For Appointment activities, the user specified in the Responsible field must be authorized to perform Activity Synchronization. For details, see “Maintaining Exchange Server Settings” on page 47.

Telephone Number/Location/Address/Script Code/Template Name. You may have to enter information in all or some of these fields, depending on the activity type you have selected.

Start Time. Enter the date and time when the activity is to start.

End Time/Duration/All Day Event check box. Indicate the date and time when the activity is expected to be completed, or enter the duration. Select the All Day event check box if the appointment activity lasts all day. The field name displayed will depend on the activity type you have selected.

Reminder. Select the Reminder check box if you want to set up a reminder alarm for the activity. Indicate the required options.

Send Reminder by E-mail. Select this check box and enter your e-mail ID if you want the reminder to be sent to your inbox.

Comments. Enter any comments related to the activity that you want to record.

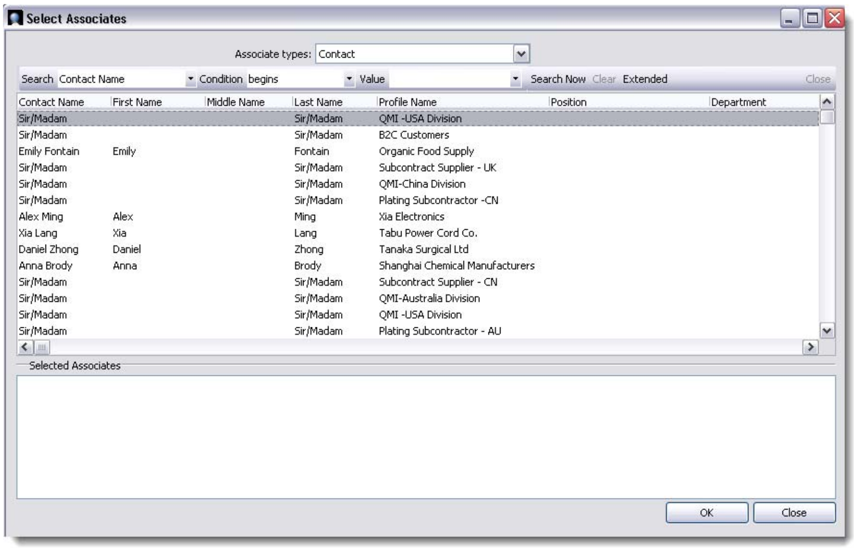
Other Information. Select the Priority, Categories, Reference, Organizer, and Status details for the activity. Select the Private check box if you do not want other users to have access to this activity.

Note The Other Information and Associate It With options are available in the Further Details tab for E-mail type activity.

Associate It With. Click this button to display the Select Associates window. Through the Select Associates window, you can associate the activity to any other profile, contact, opportunity, campaign, installed base, or issue.

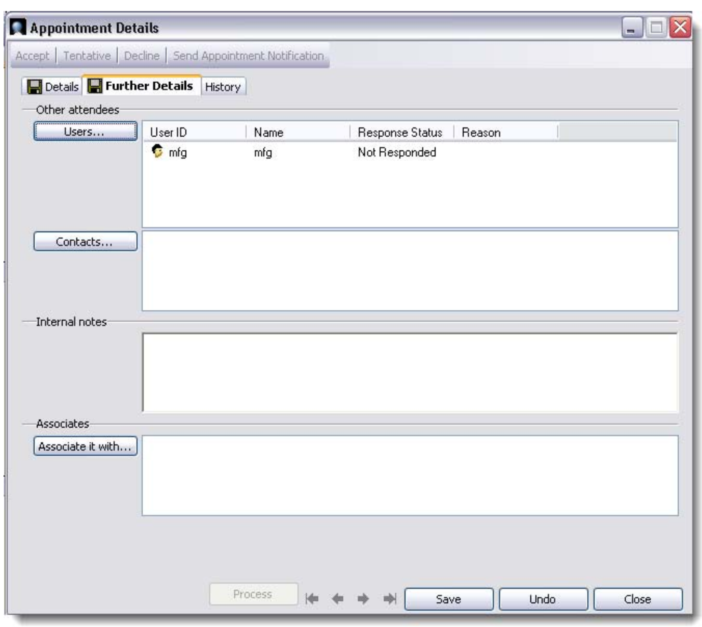
Note This button is available in the Further Details tab for Appointment type activity.

Fig. 5.6
Select Associates



An Appointment activity also has a section named Other Attendees. In this section, you can record the details of the users and contacts who may participate in the meeting for which you are setting up an appointment. Users refers to internal contacts or salespersons within the organization. Contacts are external contacts or customers who are invited for the meeting.

Fig. 5.7
Appointment Details: Other Attendees



When you save an appointment activity, you are prompted to decide whether to send notifications to the attendees.

- Yes. Choose this option to send notifications.

If the Send Appointment Notification window displays, choose the users and contacts to whom you want to send invitations by selecting the respective check boxes. Some user and contact names may appear non-updateable for any of the following reasons:

- Invitations are sent to them directly through the Microsoft Exchange Server. For this to happen, Exchange Server integration with QAD CRM must be enabled.
- E-mail IDs of the users and contacts are either missing or invalid.

When the appointment notification is sent out, the attendees who are not authorized for activity synchronization see the appointment in the Activity view in QAD CRM and can accept or decline it. Attendees who are authorized for activity synchronization additionally receive an invitation in Microsoft Outlook and can accept or decline the appointment in Microsoft Outlook, not in QAD CRM.

Note The activity is not sent to Microsoft Outlook until the synchronization is performed.

- No. Choose this option if you do not want to send notification now. You can send notification later by clicking the Send Appointment Notification button on the toolbar.

History

Use the History tab to record a transaction history for the activity. When you process activities, you create transaction history records. This tab serves to maintain records of those activities that have been processed.

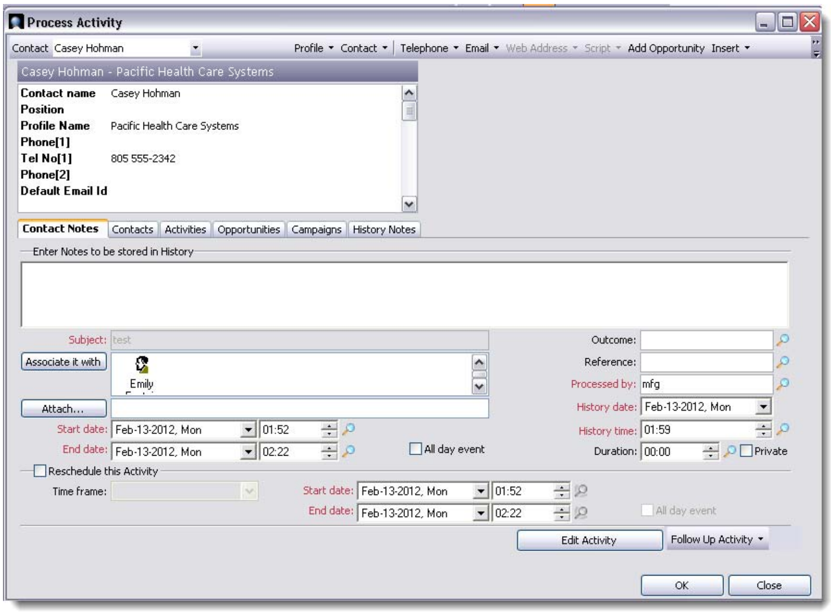
Select the columns you want to display in the transaction history. You can also add notes for the records displayed.

Processing Activities

You can process activities that have been created for your action.

To process a selected activity, right-click and choose Process. The Process Activity screen displays.

Fig. 5.8
Process Activity



The Process Activity screen has two parts. The top half displays profile details. The bottom half contains six tabs described in Table 5.1.

Table 5.1
Process Activity Tabs

Tab	Action
Contact Notes	You can use the Contact Notes tab to enter notes that get stored in the history notes. For example, you can prepare a visit report for a completed appointment call. Some field values are picked up by default in this tab based on the profile you have selected. You can reschedule or edit the selected activity here, or set up follow-up activities for later. In case you select Letter type activity, two additional buttons display. Use the Export Header and Data and the Mail Merge buttons to generate a letter from this tab.
Contacts	The Contacts tab lists the contacts associated with the selected profile. It lets you add and edit contacts as well.
Activities	Use the Activities tab to view a list of activities or to see the activity transaction history. You can choose the View Reading Pane option if you want to see the comments recorded with each activity record. To access this option, either right-click the Activity tab area and select from the menu, or choose from the Options button.
Opportunities	The Opportunities tab displays a list of opportunities that are associated with the selected profile.

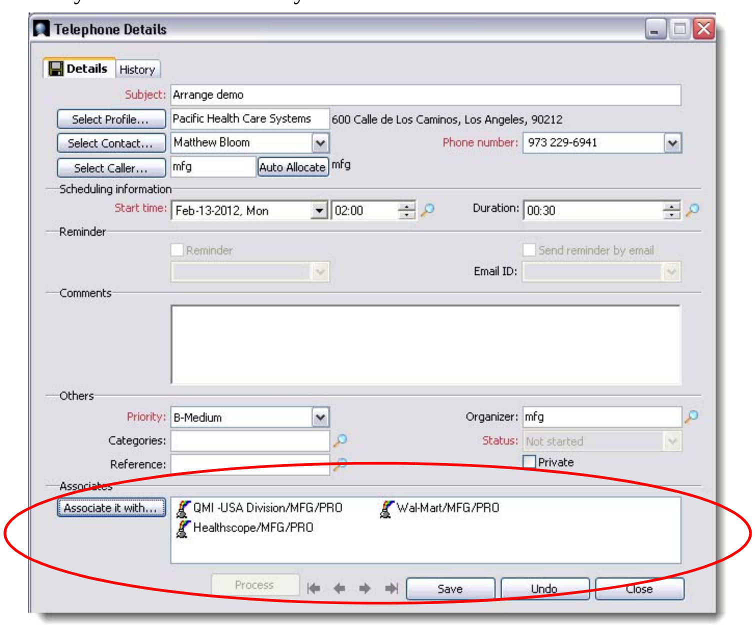
Tab	Action
Campaign	Use the Campaign tab to see the campaigns associated with the contacts of the selected profile. You can add associates to the activity you are processing through the Associate It With button that displays the Select Associates screen.
History Notes	Use the History Notes tab to view associated history notes for the contact.

Checking Activity Associations

You can check all the associations of an activity using one the following methods:

- Select an activity, right-click, and choose Edit. The Activity Details screen displays in Edit mode. Check under the heading Associates to see a list of current associations. You can add more associations by clicking the Associate It With button.

Fig. 5.9
View Activity Associations: Activity Details Screen



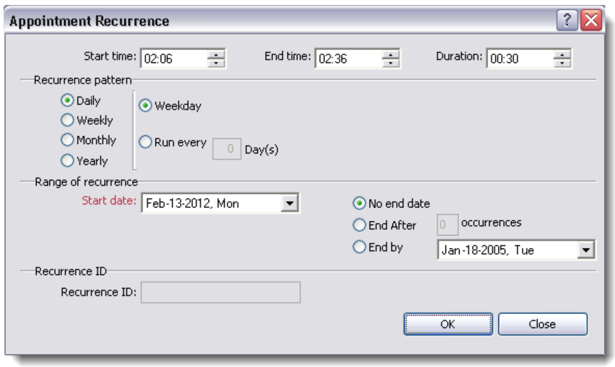
- Click on the Associates button in the QAD CRM toolbar to display all associations of a selected activity.

Setting Up Recurrences

This module lets you set up recurring activities by entering details through the Recurrence option.

1 To set up a recurring activity, right-click the workspace and choose Recurrence. Alternatively, choose the Recurrence option from the File menu or click the Recurrence button from the toolbar. Depending on the activity type you select, the appropriate Recurrence screen displays.

Fig. 5.10
Activity Recurrence for an Appointment Type Activity



2 In the Recurrence screen, enter the time details such as Start Time, End Time, and Duration.

3 Select a Recurrence Pattern for the activity type. The options are Daily, Weekly, Monthly, or Yearly. Depending on your selection, the recurring criteria area updates.

4 In the recurring criteria area, specify the required criteria for repeating the activity. For example, if you selected Weekly in the recurring type area and want the activity to repeat every Monday, select Monday in the recurring criteria area.

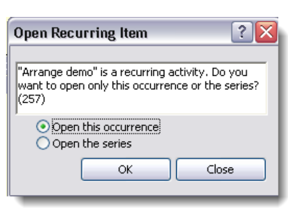
5 In the Range area, specify the period during which you want the activity to repeat. Once this period is over, the activity repetition also stops. Specify the start date of the period in the Start Date field. This field is mandatory. In the End Date field, select the date or the number of occurrences after which the activity period ends.

6 When you click Save, the system generates a Recurrence ID and the Recurrence button appears on the Activity Details screen.

Note A new record gets created in the calendar for each recurring activity.

When you edit a recurring activity, the system displays a pop-up window to confirm whether the change is applicable to a particular instance or the entire recurrence series.

Fig. 5.11
Open Recurrence Item



Managing Tasks

Tasks are non-business related activities that you can assign to yourself or to others in your team through the Activities module. Tasks assigned to you display in the Task box.

Tasks are listed depending on the number of records you choose to display in a batch. You can select this number through the Options button available just below the Tasks area in the workspace. Use the arrow keys to move between the batches of records displayed.

Selecting the check box next to a task indicates that the selected task has been completed and its current status is Closed. This will also apply strikethrough formatting to the selected task.

You can view the displayed task records in six different views. Right-click the task area to select the required view from the options available. The views available are:

- All Tasks: Displays all task records, irrespective of the start date, end date, and status
- Today's Tasks: Displays tasks scheduled for the current date
- Active Tasks for Selected Days: Displays tasks scheduled for the days selected in the monthly calendar
- Tasks for Next Seven Days: Displays tasks scheduled for the next seven days from the current date
- Overdue Tasks: Displays tasks that have not been completed or closed despite passing their end dates, and are therefore overdue
- Tasks Completed on Selected Days: Displays only those tasks that have been completed, and have their status as Closed, for the dates selected in the monthly calendar

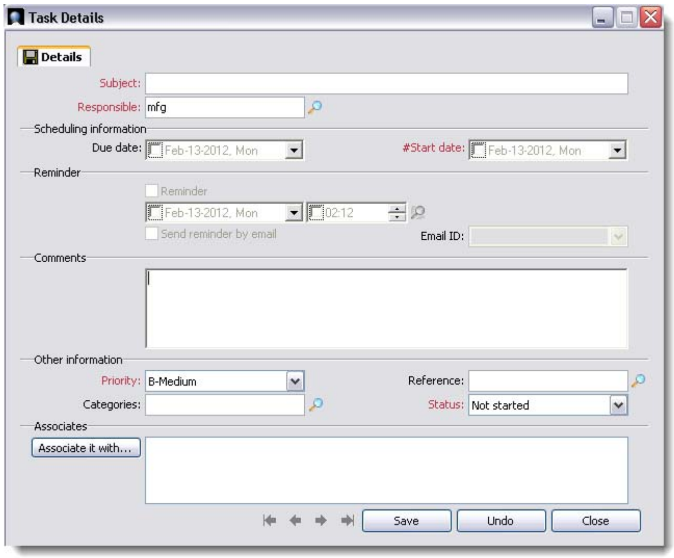
Maintaining Tasks

You can see the details associated with a task by double-clicking on it. This opens the Task Details window. You can also right-click the task area to add, edit, copy, delete, or create associates for a task.

1. Choose Sales Management|Activities. The activity calendar displays in the workspace along with the monthly calendar and the tasks assigned to you.
2. Right-click the task area of the workspace and choose Add from the menu. The Task Details screen displays.

   Note This menu also contains options for editing and deleting existing tasks.

Fig. 5.12
Task Details



Details

Use the Details tab to record the details of the task you are creating.

Subject. Enter a subject name for the task.

Responsible. Select the person responsible for performing the task.

Due Date. Enter a date by which the task is to be performed.

Start Date. Enter a date on which the task is to be started.

Reminder. Select this check box if you want the system to send reminders. Indicate the date, time, and e-mail ID to which a reminder should be sent.

Send Reminder by E-mail. Select this check box and enter your e-mail ID if you want the reminder to be sent to your inbox.

Comments. Enter comments, if any, for this task.

Priority. Select the priority level of this task.

Reference. Select a reference for this task.

Categories. Select the categories to which this task belongs.

Status. Select the current status of this task.

Associate. Click the Associate It With button to associate the task with any of the associate types. The types available are Profile, Contact, Opportunity, Campaign, Installed Base, and Issue.

Managing Customer Visit Reports

You can compose and submit visit reports from any e-mail client and do not need to log onto the QAD CRM system.

To submit a report using e-mail:

1 From your e-mail client, create a new e-mail.

2 In the recipient field, enter the QAD CRM Mail Room Address.

   The QAD CRM Mail Room Address is maintained by the system administrator on the E-Mail tab in Settings|Mail Server Integration|Settings And Switches.

3 In the Subject line of your email, enter the text **Visit Report-** followed by the e-mail address of the contact who you visited.

   Example Visit Report-username@company.com

   You can use any of the listed subject formats to submit a visit report to the QAD CRM system.

   - Visit Report-<CONTACT_EMAIL_ID>
   - Visit Report-<QAD_CRM_CONTACT_ID>
   - Visit Report-<CONTACT_EMAIL_ID>:Opportunity-<QAD_CRM_OPPORTUNITY_ID>
   - Visit Report-<QAD_CRM_CONTACT_ID>:Opportunity-<QAD_CRM_OPPORTUNITY_ID>

4 In the e-mail body, compose your report content.

5 Send the e-mail when you finish.

When the e-mail is sent, the visit report details are attached to the Profile. The authorized users can access the report details from the Activities tab in the All Profiles module.

Working with E-mails

You can compose and send e-mails in QAD CRM if the e-mail preferences are configured properly in your system. The e-mails can be synchronized to Microsoft Outlook. The e-mails created or received in Microsoft Outlook can also be synchronized to QAD CRM.

Sending an E-mail from QAD CRM

Before using this function, set the e-mail preferences in your system. See “Email” on page 37 for details on e-mail preferences.

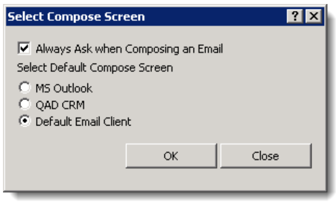
To send an e-mail from QAD CRM:

1 Do any of the following:

   - Click the Send an Email button on the toolbar.
   - Choose Email from the Add an Activity drop-down list.

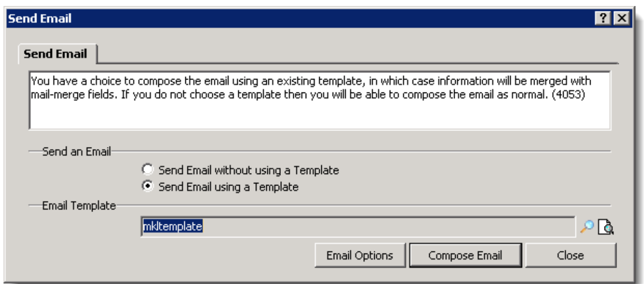
2 If the Select Compose Screen pops up, select your e-mail client and click OK.

Fig. 5.13
Select Compose Screen



3 On the Send Email window, select your template and click Compose Email.

Fig. 5.14
Select e-mail Template



The e-mail compose window is displayed.

4 Compose and send your e-mail.

Synchronizing E-mails

The synchronizing e-mails function requires the integration with exchange server to be enabled. See “Maintaining Exchange Server Settings” on page 47 for details. The synchronization policies are maintained by the system administrator in Settings|Mail Server Integration|Settings and Switches.

If the automatic e-mail synchronization is enabled, the e-mails are synchronized automatically when the next synchronization is performed by QAD CRM Admin Service. The system administrator can set the frequency for synchronization.

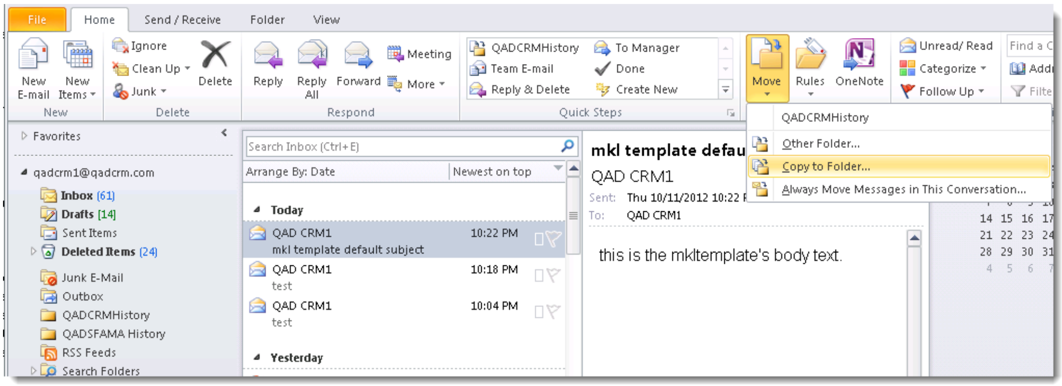
The e-mails from Microsoft Outlook are reconciled by the e-mail address in QAD CRM. If the e-mail address matches that of a contact in QAD CRM, the e-mail details are created as a history record in QAD CRM against that profile and contact.

If your system is not configured to synchronize e-mails automatically, you must do it manually.

Manually Synchronizing an E-mail to QAD CRM

For the users who use Microsoft Outlook and Outlook Access, copy the e-mail from a CRM contact to the QADCRMHistory folder using the Copy to Folder option. The e-mail is brought into QAD CRM when the Admin Service checks for new e-mails from the exchange server.

Fig. 5.15
Copy an E-mail to the QADCRMHistory Folder



To manually synchronize an e-mail from Mobile Microsoft Outlook and other mail clients using Active Sync, forward the e-mail from a CRM contact to the QAD Mail Room Address. You can get the address from the Emails tab in Settings|Mail Server Integration|Settings and Switches. In the Subject field of the forwarded e-mail, include the e-mail address of the original e-mail sender and the original subject. Use a pipe character (|) to separate the e-mail address and the subject.

Example

Original Subject: Re: Quotation

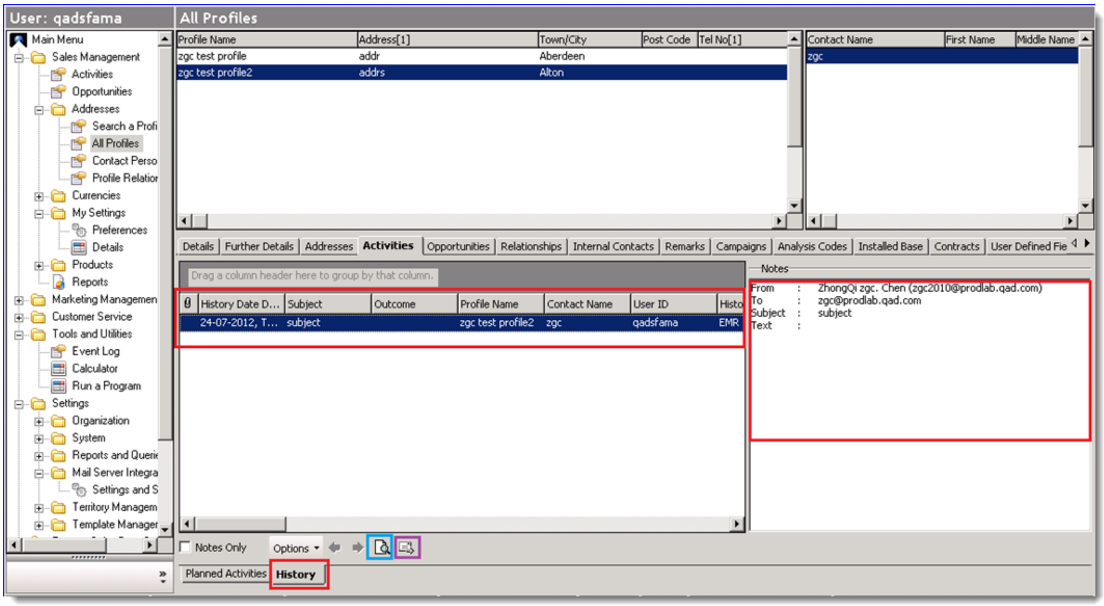
Subject in the forwarded e-mail: username@company.com| Re: Quotation

Viewing E-mails Transferred to QAD CRM

In QAD CRM, you can go to Sales/Marketing Management|Addresses|All Profiles|Activies|History to view the e-mails from Microsoft Outlook. The e-mails are attached to the profile that the contact is included in.

To view the e-mails in HTML format, click the magnifier icon. If Microsoft Outlook is locally installed, click the e-mail icon to open the e-mail in Microsoft Outlook. The attachments of the e-mails are not stored in QAD CRM. You can view them by opening the e-mails in Microsoft Outlook.

Fig. 5.16
View E-mails from Microsoft Outlook in QAD CRM



Chapter 6

Working with Opportunities

This section describes working with opportunities. It discusses the following topics:

Managing Opportunities 74
Discusses the process of identifying and following up on opportunities, sending quotes and negotiating details, finalizing orders, and offering post-sales service.

Opportunity Lifecycle in QAD CRM 75
Describes the stages of an opportunity life cycle.

Maintaining Opportunities 76
Explains how to use the Opportunities module with details on the module contents and maintaining opportunity lines.

Managing Role Players 84
Discusses different types of role players with details on external and internal role players, competitors, and partners.

Filtering Opportunities 86
Explains how to use the Opportunity Filter screen.

Enterprise Applications Integration Considerations 87
Explains how to send quotes to Enterprise Applications, use sales quotation template records, send sales orders to Enterprise Applications, receive sales quotes and sales orders from Enterprise Applications, and discusses some differences for the Enterprise Edition.

Managing Opportunities

Managing business opportunities is an integral part of business generation efforts. It involves identifying business opportunities and following them up in an effort to convert them into actual business. It increases sales potential, which in turn increases profitability.

Business opportunities offered by profiles and contacts must be managed effectively to be able to translate into actual sales and expand business. The QAD Customer Relationship Management (QAD CRM) system helps you manage these opportunities through the Opportunities module.

Typically, the business opportunity management process has the following stages.

Identifying Opportunities

This stage involves identifying opportunities through various sources. For example, a prospective customer may contact your sales or marketing representative with an inquiry. Alternatively, you may conduct a marketing campaign to attract prospective customers, who come forward with inquiries. All opportunities have a source. It may be an advertisement your organization places in a magazine, a marketing campaign, or a recommendation from an existing customer.

To follow up an opportunity, it is important to first record details of the opportunity, which include the prospective customer details, type and source of opportunity, how you position the opportunity, and the probability of the opportunity becoming actual business. Recording such details helps you evaluate the importance of an opportunity and of following it up.

Following Up Opportunities

Following up an opportunity means performing activities in an effort to convert a business opportunity to a business deal. These follow-up activities can include attending to inquiries from prospective customers; demonstrating or informing them about various offers, products or services; and asking them questions about their specific requirements, based on which you can formulate and inform them about the best deal for them. The aim of follow-up activities is to generate interest in prospective customers about your offerings.

If the follow-up activities related to a business opportunity succeed, the next stage of opportunity management follows. If follow-up activities fail to generate enough interest in prospective customers, the business opportunity can be considered as lost or dead. Thus, it is important to record the response from prospective customers to identify and focus activities for good business opportunities.

Sending Quotes and Negotiating Deals

If prospective customers are interested in your offerings, they ask for associated quotes and terms. This stage includes sending quotes of your products or services and negotiating the deals. Several activities are involved in this stage, such as sending out quotes, formulating any discounts and special offers, meeting prospective customers, and negotiating terms and conditions of the prospective sales.

Finalizing Orders

Once prospective customers are satisfied with the quotes and terms of your offerings, you proceed to finalize the order. This stage involves signing business contracts and purchase orders, and processing the business transaction.

Offering Post-Sales Service

Although the formal opportunity management process ends with the final order, it should be followed by post-sales activities, such as customer care and customer follow-up activities. These activities are important to maintain a good relationship with customers, and to create the opportunity for future sales or repeat orders.

It is also possible that an opportunity is put on-hold by the prospective customer during any stage of the opportunity management process. Such opportunities must be followed up to gain business, whenever the prospective customer is ready to give it.

Opportunity Lifecycle in QAD CRM

The opportunity enters CRM as stage enquiry, and the opportunity passes through a series of qualifying stages such as quotation, moving through to an order and finally being invoiced. Obviously not every opportunity becomes an order, so at each opportunity stage change there is the option to advance to a stage that qualifies out the opportunity. These stages—such as lost or dead—reflect the requirements of the sales cycle within different industries and can be defined as required.

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

1. Enquiry: This is the starting point for any opportunity and is mandatory.
2. 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
3. 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.
4. 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.

In addition to the fixed stages, QAD CRM enables CRM implementers to define their own stages using the Stage Lookup defined in the Lookup Values function (lookup number: 153).

By defining against each stage a list of possible next stages, a workflow can be built that enables the system to control the way an opportunity progresses through the system.

A good example of such a flow would be to ensure that the Quote stage cannot be selected when changing the stage of an opportunity from the current stage value of Order. In this case the stage lookup value Order would not list the Quote stage as a possible next stage.

The assumption underlying opportunities in QAD CRM is that they are not static and can change over time. The original enquiry and the final order may be different in products and quantities. CRM is designed to capture the details at every stage and to snapshot the details. So when an enquiry advances to a quote, even though the quote itself differs from the original enquiry, the history of the original enquiry is maintained. The stage is the unit at which this snapshot occurs.

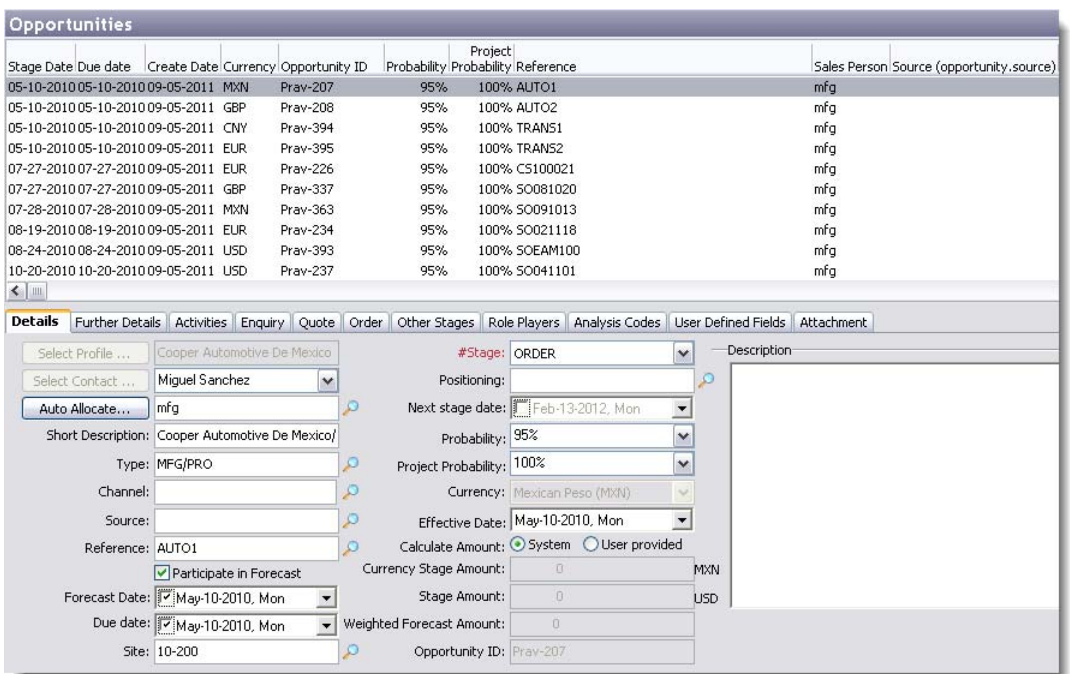
Maintaining Opportunities

The Opportunities module lets you manage a list of opportunities, specify opportunity details, identify key people involved in the opportunity, and maintain details of quotes and orders. It also allows you to specify and perform various activities related to opportunities and view transaction history. You can attach files related to opportunities, and set up and use user-defined frames. Choose Main Menu|Sales Management|Opportunities to open the Opportunities screen.

You can also manage business opportunities from the All Profiles module. Go to Addresses|All Profiles|Opportunities tab. Right-click and choose to add, edit, copy, or delete an opportunity from the menu displayed. The Opportunities screen displays.

The Opportunities screen has two parts—the top half is a browser displaying the list of opportunity records in the database, while the bottom half opens the selected record in edit mode.

Fig. 6.1
Opportunities



There are multiple ways to edit an opportunity. Select the record and do one of the following:

- Click the Edit button on the toolbar.
- Right-click and choose Edit.
- Choose Edit from the File menu.

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

Details

Use the Details tab to record basic information about a new opportunity.

Select Profile, Select Contact. Use these buttons to select the profile and contact who you want to add as an opportunity.

Auto Allocate. This button lets you select an account manager for the opportunity depending on the territory allocation defined in Territory Management. Alternatively, you can use the look-up to select a sales representative to service the opportunity.

Short Description. Enter a short description of the opportunity you are creating.

Type, Source, Reference. Enter the type, source, and reference fields with the help of the look-ups provided.

Channel. Enter the sales channel associated with this opportunity if any. This field is used in the Sales Quote and Sales Order functions in Enterprise Applications for the allocation of sales accounts when advancing opportunities in CRM to the Quote or Order stages respectively. Once the sales order or quote has been created in Enterprise Applications from CRM, then the channel field should be updated from the Sales Quote or Sales Order function to ensure that sales account values are correctly updated.

Participate in Forecast check box. Select this check box if you want the opportunity you are creating to participate in sales forecasts. Reports that display forecast information will exclude opportunities that have this box unselected.

Forecast Date, Due date. Select the forecast and due dates from the calendar provided. The forecast date is used primarily by reports that show forecast information.

Site. Enter the default Site for Shipment and Pricing calculation (if any). This field defaults from the site value on the Profile, which in turn is synchronized with the customer default site value in the Customer Data Maintenance function in Enterprise Applications. This value provides the default for opportunity lines and ultimately the default for Sales Quotes and Sales Orders created in Enterprise Applications.

Stage. Use the drop-down list to select the current stage of the opportunity in the overall cycle. Opportunity stages can be any of the QAD pre-defined stage types or stage values set up for your implementation. These stage values are identified in the Stage Lookup defined in the Lookup Values function (lookup number 153).

Positioning. Use the look-up provided to enter the details pertaining to possible sub-stages. Typically the *stage* for an opportunity reflects a significant milestone in the sales process (quote, order, and so on), whereas the *positioning* refers to the significant actions required within the stage to progress to the next stage. For example, for an opportunity at Quotation stage there may be a preliminary quotation sent, negotiations take place, and then a final quote is generated. Positioning can be used to record these required events. QAD supplies predefined positioning values for the predefined opportunity stages, but these should be tailored during implementation and setup.

These stage values are identified in the Stage Lookup defined in the Lookup Values function (lookup number 153).

Next Stage Date. Enter an approximate date when the opportunity is likely to progress to the next stage. This value drives some sales reporting along with the alerting function, which can e-mail selected individuals when opportunities have become (or are about to become) past due. See the Admin Service section in the *CRM Administration Guide* for more details on how this can be configured.

Probability. Choose an appropriate probability percentage from the drop-down list. Probability refers to the likelihood of translating an opportunity into an actual sale and is used by the system (in conjunction with project probability) when calculating the Weighted Forecast amount for the opportunity. The Probability value can be set to default based on the current stage (lookup number 153). This is useful in organizations where management has identified that the likelihood of a confirmed sale can be mapped directly to the stage and positioning within the sales cycle. It ensures that forecast (funnel) reporting is consistent.

Project Probability. Choose an appropriate project probability percentage from the drop-down list. Project probability can be used as a general purpose modifier of the Probability value.

This example indicates the difference between the Probability and the Project Probability fields.

- Probability: When salespersons manage their opportunities they need to assign a probability to the business. This acts as a weight on the inquiry and quote. By recording the probability percentage as accurately as possible you can ensure that the forecast that emerges is more realistic. Suppose an inquiry is valued at 10,000 with 80% probability. In such a case the forecast value becomes 8000, and the salesperson’s funnel also becomes 8000.
- Project Probability: This value acts as a separate weighting factor that works cumulatively with the Probability value, and can further modify the forecast. It could be used as a measure for:
  - The seriousness of the customer regarding the project—are they just looking around for ideas or do they have the funds to invest?
  - The competence of the salesperson in accurately gauging the client response—the Sales Managers can use this field in case they think their sales team is being too optimistic.

Currency. Enter the base currency of the transaction in case this opportunity turns into a sales order.

Effective Date. Select the effective date of the transaction from the calendar. This date is used by the system to calculate the exchange rate if the opportunity results in a quote or an order.

Calculate Amount. Select the appropriate radio button. If you select System, the next three fields are populated by the system. Otherwise you must manually enter the field details.

Currency Stage Amount. Enter the currency stage amount, which becomes the transaction currency.

Stage Amount. Enter the stage amount; this is always in the same currency as the base currency of transaction.

Weighted Forecast Amount. The system calculates this as the product of the Stage Amount, the Probability percentage, and the Project Probability percentage.

Opportunity ID. This is a system-generated ID that works as a unique identifier for each new opportunity record created.

Description. Use this text field to enter any description that you want to record related to the opportunity.

Further Details

Win/Lost/Dead reason code. You can record the Win/Lost/Dead reason code here to indicate how the opportunity was resolved. The system automatically prompts for this information when advancing the opportunity to a Win Lost or Dead stage. Stages are identified as Win Lost or Dead in the Stage Lookup defined in the Lookup Values function (lookup number: 153).

SWOT. Use these fields to make a note of the strengths, weaknesses, opportunity, and threats for the new record you are creating. This analysis is useful for marketing purposes and for determining the reasons in case an opportunity is lost.

Profitem ID. Use the look-up provided to enter the profitem for the new opportunity. The profitem ID is the same as the installed base ID.

Campaign ID. Use the look-up provided to enter the campaign ID for the new opportunity. If the opportunity was created directly from a marketing campaign in Campaign Processing, then the campaign ID would be defaulted in this field.

Activities

You can use this tab to view and manage activities associated with the contact. You can also process activities from this tab directly.

Two views at the bottom of this window let you view both planned activities and activity history.

You can choose the View Reading Pane option if you want to see the comments recorded with each activity record. To access this option, either right-click the Activity tab area and select from the menu, or choose from the Options button. History displays not only processed activities but also the history of the opportunity.

Enquiry

Use this tab to record the line details (specific products) associated with this opportunity including pricing and quantities. You can also change the opportunity stage from this tab once the opportunity advances to a new stage (such as Quote or Order) by selecting the first opportunity inquiry line record in the browse, selecting the right click menu and then selecting the option Advance Opportunity Stage.

Add a new record by right-clicking in the Enquiry tab screen and selecting Add from the menu. This displays the Opportunity Lines Details window. Enter the product details, cost details, and other pricing information and save the record.

Quote

This tab displays a list of quotes associated with the current opportunity. Since each opportunity can have multiple quotes, the screen allows you to add separate opportunity lines for all products that the customer is interested in.

You can use this tab to work with quotes from the Quote Details window and to manage opportunity lines through the Opportunity Lines Details window. From this tab it is also possible to advance the opportunity stage from quotation to a new stage (for example, order) by selecting the Quotation record in the browse, selecting the right-click menu, and then selecting the option Advance Opportunity Stage.

Order

This tab displays a list of orders associated with the current opportunity. It is possible to generate multiple orders for the same opportunity by releasing the opportunity lines in multiple batches. Since each opportunity can place orders for multiple products, the screen allows you to add separate product lines for all products that the customer is interested in.

You can use this tab to manage orders from the Order Details window and to work with product lines through the Opportunity Lines Details window.

Using this tab you can view details of all opportunity stages associated with a record. Select which stage you want to view through the drop-down list provided.

From this tab it is also possible to advance the opportunity stage from the current stage to a new stage by selecting the Stage record in the browse, selecting the right-click menu, and then selecting the option Advance Opportunity Stage.

Role Players

Use the Role Players tab to add any one of the four types of role players that can be associated with an opportunity: External, Internal, Competitor, and Partner. You can also manage records of existing role players from here.

Note By default the first External role player is the Profile contact associated with the Opportunity and the first internal role player is the Salesperson associated with the opportunity as identified in the Details Tab.

You can specify multiple role players of each type for an opportunity. For more details, see “Managing Role Players” on page 84.

Analysis Codes

Use the Analysis Codes tab to set codes and groups for the opportunity. An opportunity can have multiple analysis codes and analysis groups.

To add a group, select an option from the Select an Analysis Group drop-down list and click the Add button next to it. This displays the associated codes. If you want to select all available groups in the system, click the Select All Groups button.

Select or clear the group code check boxes as required. Click Save to record your selection in the system.

Choose your view options from the radio buttons provided. To view all group codes, select All.

User-Defined Fields

If any user-defined frames and fields are set up for opportunities, you can view them or edit them through this tab. User-defined frames and fields give you the flexibility to add parameters to each record based on your unique requirements.

Only a system administrator can create user-defined frames and fields through Settings|System|User-Defined Fields. For more details, see the *Administration Guide: QAD Customer Relationship Management.*

Attachment

The Attachment tab lets you attach a document from your hard disk to the system. Right-click and select Attach Document from Hard Disk from the menu to attach a document of your choice. You can also choose the display view of the attachments by selecting from the options available in the right-click menu.

You can also detach, open, or view the properties of a selected attachment. Right-click and choose the required option from the menu.

Note In order to share documents from the Attachment tab and view them successfully, make sure that the documents are attached from a shared network drive that is accessible to all users in a team or business unit. If any user attaches a document from a local hard drive to QAD CRM through the Attachment tab, it will not be accessible to others. The current release of QAD CRM does not enable the synchronization of attachments between a remote sales node and the main CRM installation.

Maintaining Opportunity Lines

Opportunity lines consist of a list of products and their pricing details. They are associated with opportunity stages and not directly with the opportunity record.

Example A profile is interested in two products. They have ordered one product and asked for a quote for the other. In this case, a single opportunity record for the profile has one product in the order stage and the other in the quote stage.

You can also maintain opportunity line details from the Enquiry, Quote, Order, and Other Stages tabs of the Opportunities module. The opportunity lines feature supports user-defined frames.

Use the Opportunity Lines Details window whenever you want to record details for a new product.

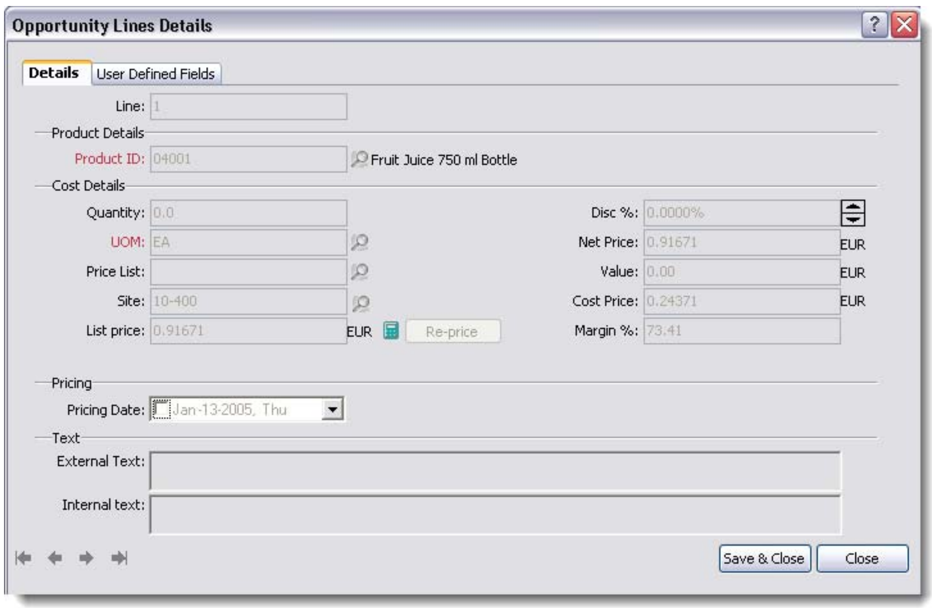
Best Pricing

Opportunity lines in CRM can make use of Pricing tables and rules. These are not maintained within CRM but are available through the standard Sales Order Price list functions in Enterprise Applications. To set up pricing within Enterprise Applications, see *User Guide: QAD Master Data*.

QAD Remote Sales Considerations for Pricing in CRM

As all price list information continues to be maintained in Enterprise Applications, the Best Pricing capabilities described below will only function correctly in a remote sales session when a connection to the host system is available through a VPN connection. If a VPN connection is not available at the time of opportunity entry, the operator has the choice of either entering the price directly into the opportunity or utilizing the opportunity Re-price function when a connection is available.

Fig. 6.2
Opportunity Lines Details



Details

Use the Details tab to record basic information about a new opportunity line.

Line. Refers to a system-generated number that is given to the new line you are adding.

Product ID. Use the lookup to choose the unique product ID for the opportunity line you are adding. Products available to select from should correspond to items available in Item Maintenance but can also include products that have been locally defined in QAD CRM. This is a mandatory field and cannot be updated once a newly created record has been saved.

Quantity. Enter the quantity of items for which a request has been received from the customer.

UOM. This identifies the selling unit of measure for the product entered. This is a mandatory field and is populated automatically when a product ID is chosen.

Price List. This refers to a manual price list that can be entered to determine pricing. Refer to Enterprise Applications help for the Price list capabilities for more information.

List Price. Enter the listed price of the product or item you are adding. If the item is available in Enterprise Applications and has been synchronized from Item Master Maintenance into QAD CRM, then this defaults from the item price in Item Cost Maintenance.

Site. Enter the code for the expected shipping site code for this opportunity line. The site value is also relevant to the determination of pricing where pricing rules have been defined as “cost plus.”

This value defaults from the opportunity header if the site is valid for this product or the default site for the product as identified in Item Inventory Data Maintenance. It is possible to override this value. However, an invalid entry will result in the site value reverting to a valid site based on the above rules.

Disc %. Use the arrow keys to enter a discount percentage if you want to offer some special discount on the product or item you are adding. If the Net Price has been derived by the application of Best Pricing rules then this value is calculated from the difference between the List Price and the Net Price.

Net Price. Enter the net price of the product after the discount has been calculated. If price lists have been configured in QAD Enterprise Applications that are applicable to this customer and/or product, then these will be utilized to determine the Net Price.

Value. This field reflects the net price of the opportunity line extended by the quantity entered.

Cost Price. Enter the cost price of the product or item you are adding. If the item has been synchronized from Item Master Maintenance in QAD Enterprise Applications, then this defaults from the item cost in Item Cost Maintenance.

Margin %. This value reflects the % markup of Cost to arrive at Net Price.

Pricing Date. Select the check box and choose a pricing date for the product or item you are adding. This date also reflects the exchange rate effective date so both pricing date and exchange effective date are always held to be equivalent in QAD CRM.

External Text. Enter descriptive text about the product that can be used in quotes or proposals.

Internal Text. Enter comments that you want to share internally within the team or business unit.

Note for Users of CRM Prior to 6.4

The obsolete fields Transfer Price 1 and Transfer Price 2 have been removed from the user interface in CRM 6.4. If the capture of additional decimal values is required for the Opportunity Line, you can use the user-defined field capability described below.

CRM no longer supports the previous stand-alone VAT facility, and these fields have also been removed from the user interface.

When to Use the Re-price Button

Once an opportunity line has been created and saved, subsequent updates to the opportunity line do not automatically compute a new price. This is to account for the situation where the operator has intentionally overridden the Net Price with a one-off price.

For this reason and some other specific circumstances, the user interface includes the Re-price button. Use this button in the following circumstances:

- When the Quantity UOM Price List or Site code values are updated on an existing Opportunity Line.

- When running remote sales and the VPN connection was unavailable when the opportunity line was first created.
- When price lists have been updated in Enterprise Applications and these updates should be reflected in the pricing for current opportunities.

User Defined Fields

The User Defined Fields tab displays all the user-defined frames and fields set up in the system for opportunity lines. You can ask your system administrator to create user-defined frames and fields through Settings|System|User-Defined Fields. For more details, see the *Administration Guide: QAD Customer Relationship Management.*

Managing Role Players

Key persons, or role players, associated with an opportunity are responsible for making decisions about the opportunity. Using the Opportunities module, you can maintain details of external and internal role players.

External role players are members of the profile organization that offers the opportunity. They can also belong to other profiles. For example, the profile offering the opportunity can have a partner who plays an important role in the opportunity.

Internal role players are members of your organization, such as sales representatives, who are responsible for managing the opportunity.

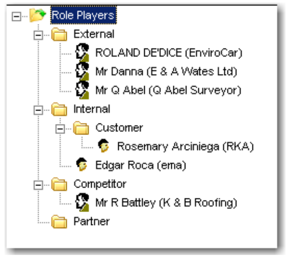
Since both internal and external role players consider partners and competitors while making business decisions, maintaining their details in the Opportunities module is crucial. This also provides easy access to required information, expediting the decision-making process. For example, when you specify details of a competitor in an opportunity, you also specify the competing products and relevant information. This is useful while analyzing the success probability.

The Role Players tab of the Opportunity Details defines four types of role players who can be associated with an opportunity. The defined types are:

- External
- Internal
- Competitor
- Partner

The Opportunity Details screen lets you add new role players, or edit, copy, and delete existing records.

Fig. 6.3
Role Players



External Role Player

All contacts attached to a profile that is targeted as an opportunity can be considered as external role players.

1. To add an external role player, select the External folder icon in the Role Players tab.
2. Right-click and select Add from the menu. This displays the Profile Details window.
3. In the Profile Details window, select the profile and the relevant contact who you want to add as an external role player. Enter the reporting details and the organizational relationship. Indicate the level of influence the profile is likely to have as a role player.
4. Select the Primary check box if you want to add this contact as the primary role player. To include this contact in performance evaluation, select the Participate in Performance Evaluation check box.
5. Save the record. The External icon displays the role player and the associated profile name, along with the relationship you have assigned to it.

Internal Role Player

People who are part of the organization and play a part in converting an opportunity to an actual sales order can be defined as internal role players. Account managers or sales representatives fall into this category.

1. To add an internal role player, select the Internal folder icon in the Role Players tab.
2. Right-click and select Add from the menu. This displays the SalesRep Details window.
3. In the SalesRep Details window, select the representative who you want to add as an internal role player. Enter the organizational relationship and the commission charged by this sales representative.
4. Select the Primary check box if you want to add this contact as the primary role player. To include this contact in performance evaluation, select the Participate in Performance Evaluation check box.
5. Save the record. The Internal icon displays the role player and the associated profile name, along with the relationship you have assigned to it.

Competitor

Any company that has a comparable product in the market can be termed as a competitor.

1. To add a competitor, select the Competitor folder icon in the Role Players tab.
2. Right-click and select Add from the menu. This displays the Competitors Details window.
3. In the Competitors Details window, select the profile you want to add as a competitor, and the relevant contacts.
4. Select the Primary check box if you want to add this competitor as the primary role player in this category.
5. Select the competing products from the look-up provided and add comments, if any.
6. Save the record. The Competitor icon displays the role player and the associated profile name.

Partner

Partners can be referred to as associates of the profile offering the opportunity. These partners may play an important role in deciding the fate of the opportunity; recording their details is important.

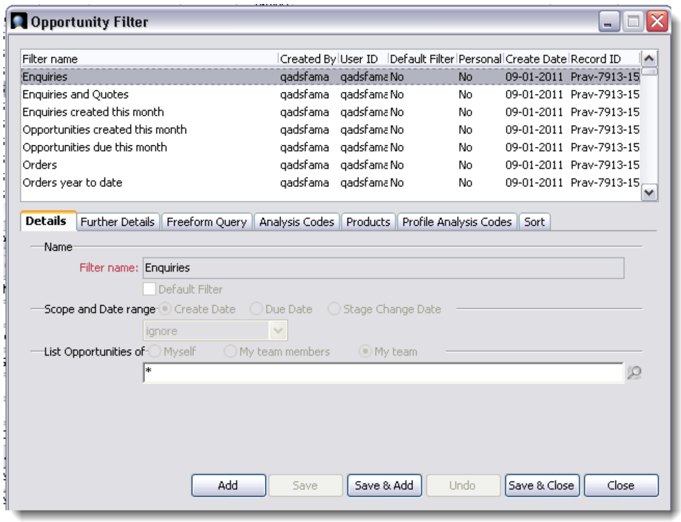
1. To add a partner, select the Partner folder icon in the Role Players tab.
2. Right-click and select Add from the menu. This displays the Partners Details window.
3. In the Partners Details window, select the profile and the relevant contacts who you want to add as role players.
4. Enter comments, if any, and save the record. The Partner icon displays the role player and the associated profile name.

Filtering Opportunities

As in the case of most data-based screens, after sustained use, the system contains an extensive database of opportunity records. In such conditions, the filtering feature of the system helps you manage these records in the best manner by letting you create filters according to your requirement.

The Opportunity Filter screen lets you define filters for viewing opportunity records. For more details on using filters, see the example “Filtering Profile Records” on page 107.

Fig. 6.4
Opportunity Filter



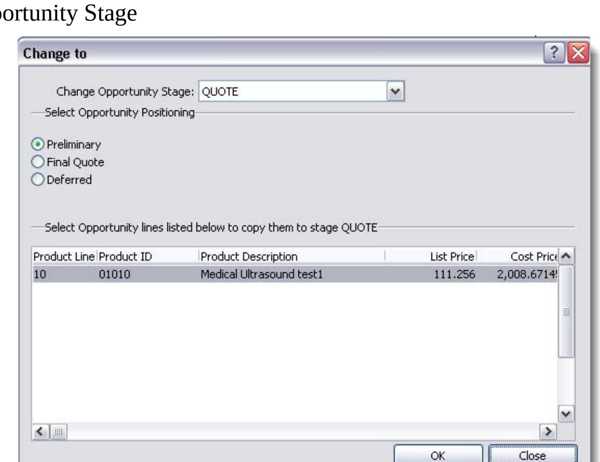
Enterprise Applications Integration Considerations

As opportunities are maintained in QAD CRM and are advanced to the stage of Quote or Order, data can be sent to QAD Enterprise Applications. This capability is only made available if the integration settings identified in QAD ERP settings for quotes and sales orders are set appropriately. See the *CRM Administration Guide* for details on these settings and how they affect the operation of the integration. The following discussion assumes that the integration settings are all set as active.

Sending Quotes to Enterprise Applications

When an opportunity is advanced to stage Quote using the right-click menu option Advance Opportunity Stage, any selected item lines are sent automatically to QAD Enterprise Applications and created as a quote in Sales Quote Maintenance.

Fig. 6.5
Change Opportunity Stage



This operation will only occur if item lines are selected. If no lines are selected, then no quote is created in Enterprise Applications. However, if line items are later added in the Quotation stage of the opportunity, this will also trigger the creation of the quote in Enterprise Applications.

Adding lines to a quote in CRM that has already been sent to Enterprise Applications will result in the addition of those lines to the sales quote in Enterprise Applications.

If the customer corresponding to the CRM profile does not exist in Enterprise Applications, then the customer can be automatically created. This behavior can be disabled for the system in the ERP Integration Settings function if considered undesirable from an implementation standpoint.

At the end of this process the Reference field on the Opportunity Detail screen will be set to the value of the sales quote number assigned in QAD Enterprise Applications.

Sales Quotation Template Record

CRM does not supply all of the data necessary to create a sales quotation in QAD Enterprise Applications. Instead, the system uses a predefined sales quote record as a template to provide default values. These templates exist by domain, so each domain has its own template record. Template records are discussed in more detail in the *CRM Administration Guide* and should be maintained when the system is configured.

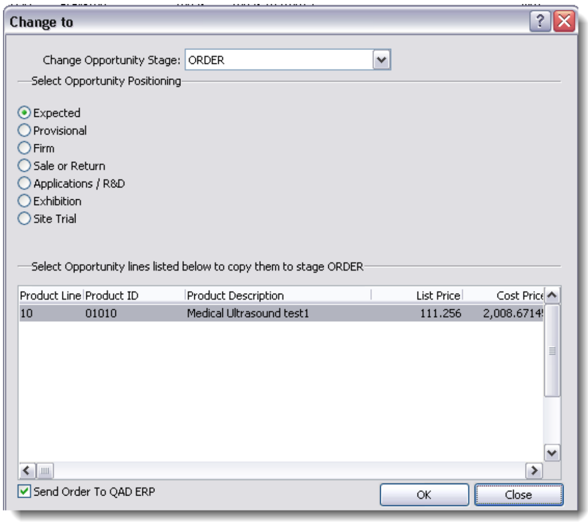
As a general rule, the sales quotation in QAD Enterprise Applications is created by taking a copy from the template and then overlaying the template values with the opportunity field values supplied by CRM.

Sending Sales Orders to Enterprise Applications

When an opportunity is advanced to stage Order using the right-click menu option Advance Opportunity Stage, any selected item lines can also be sent to QAD Enterprise Applications and created as an order in Sales Order Maintenance.

The Send Order To QAD ERP field at the bottom of the frame gives the user the option to not send a particular order to Enterprise Applications. If the user chooses not to send the Opportunity to Enterprise Applications at this moment, they can do so later by using the Send to QAD ERP option from the right-click menu on the Order tab.

Fig. 6.6
Change Opportunity Stage



If the customer corresponding to the CRM profile does not exist in Enterprise Applications, the Customer can be automatically created by the change opportunity stage function. This behavior can be disabled for the system in the ERP Integration Settings function if considered undesirable from an implementation standpoint.

As with the sales quote, the sales order creation process requires values for fields not maintained on the opportunity record in CRM. In creating the sales order, the integration uses the default values stored in the sales quote template record.

The Reference field on the opportunity detail screen will be set to the value of the sales order number assigned in QAD Enterprise Applications.

Once an order has been sent to Enterprise Applications, updates in CRM will no longer be replicated to the Enterprise Applications sales order. Sending the sales order to Enterprise Applications is an effective handover of responsibility for the management of the sales order from CRM to Enterprise Applications.

However, subsequent updates on the order created in Enterprise Applications will be transferred back to CRM. Most notable here are the shipped and invoiced quantities on the order lines. When the order is invoiced from Enterprise Applications, the CRM opportunity will be advanced to the stage Invoiced.

Receiving Sales Quotes and Sales Orders from Enterprise Applications

Sales quotes and sales orders can be received from Enterprise Applications as opportunities in CRM. There are two mechanisms for this.

Initial Data Load

Typically this function is run when the system is configured and ideally when all sales quote and sales order data has been loaded into Enterprise Applications.

For each sales quote and sales order currently in Enterprise Applications, an opportunity will be created in CRM against the appropriate profile.

Any opportunity that has been created in this way will have the Type field value set to MFG/PRO, and the Reference field will contain either the sales order number or the sales quote number as appropriate.

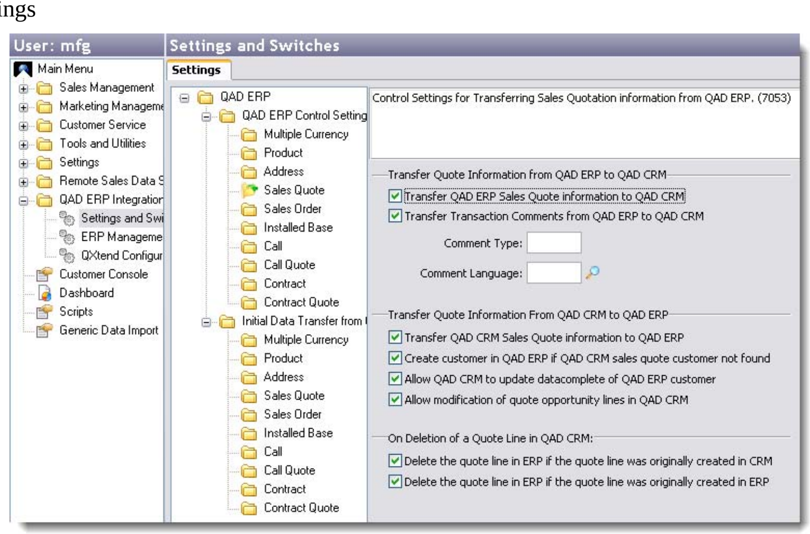
Instant Update

This mode is active whenever a user is logged on to the system. Effectively, any updates to sales orders and sales quotations that occur in Enterprise Applications will automatically create or update the relevant opportunity records in QAD CRM. The same rules apply to this process as were described for the Initial Data Load capability.

Deleting Sales Quote Lines in QAD CRM

Deleting sales quote lines in QAD CRM can have different effects when you synchronize CRM with QAD Enterprise Applications. Sales quote lines with different origins—those originally created in QAD CRM and those originally created in QAD Enterprise Applications—are treated differently in QAD CRM. Use two sales quote settings to control how sales quote data is synchronized when a sales quote line is deleted from QAD CRM, both for local and remote data synchronizations.

Fig. 6.7
Sales Quote Settings



Delete the quote line in ERP if the quote line was originally created in CRM. Select this option to delete the corresponding record in QAD Enterprise Applications when you delete a sales quote line originally created in QAD CRM; clear this option to retain the corresponding record in QAD Enterprise Applications on deletion of a sales quote line from CRM.

Select this option only if the Transfer QAD CRM Sales Quote Information to QAD ERP option is selected.

When this option is selected, if you delete a sales quote line but deletion of the corresponding record in QAD Enterprise Applications fails, the system restores the deleted sales quote line in QAD CRM and records the error. You can view the error details in the log file by right-clicking and selecting View Error Log from the menu.

Delete the quote line in ERP if the quote line was originally created in ERP. Specify whether to delete the corresponding sales quote line in QAD Enterprise Applications on deletion of a sales quote line originally created in QAD Enterprise Applications and synchronized to QAD CRM; clear this option to retain the corresponding record in QAD Enterprise Applications on deletion of a sales quote line from CRM. Clearing the option precludes situations in which you delete a sales quote line created in QAD CRM and a different sales quote line created in QAD Enterprise Applications that happens to have an identical ID number gets deleted by accident during data synchronization.

Select this option only if the Transfer QAD ERP Sales Quote Information to QAD CRM option is selected.

When this option is selected, if you delete a sales quote line but deletion of the corresponding record in QAD Enterprise Applications fails, the system restores the deleted sales quote line in QAD CRM and records the error. You can view the error details in the log file.

Important These settings only apply to sales quote line deletions but not opportunity or sales quote deletions. When you delete an opportunity or a sales quote (as opposed to a sales quote line) from QAD CRM, the system always deletes related sales quote lines in QAD CRM only and retains corresponding records in QAD Enterprise Applications.

When you delete a sales quote line in QAD CRM and reprice the quote, best pricing will only be applied to sales quote lines originally created in QAD Enterprise Applications but not to those originally created in QAD CRM.

Differences for the Enterprise Edition

The integration for sales orders and opportunities operates no differently for the Enterprise Edition except in the area of the automatic creation of customers. See Chapter 7, “Working with Profiles and Contacts,” on page 93 for details regarding the changed behavior in Enterprise Edition.

Chapter 7

Working with Profiles and Contacts

This section describes working with profiles and contacts. It discusses the following topics:

Overview 94
Explains how the Profiles module is used in the CRM system.

Searching Profiles and Contacts 94
Lists and describes different searches and the criteria required to use them, and explains how to search profiles and contacts using keyboard inputs.

Working with Profiles 96
Explains how to use the All Profiles screen, add profiles, maintain profiles, attach profiles to nodes, send profiles to campaigns, copy address labels to clipboards, view reports, send to QAD ERP, and view the customer console.

Filtering Profile Records 107
Explains how to use the Profile Filter screen.

Maintaining Profile Relationships 109
Explains how to use the Profile Relationships screen with a section on maintaining hierarchies.

Working with Contacts 111
Explains how to use the Contact Persons and Contact Details screens.

Maintaining Contact Details 112
Explains how to add, copy, and filter contacts, print mail labels, and send contacts to campaigns.

Synchronizing Contacts 117
Explains how to synchronize Contacts between Microsoft Outlook and QAD CRM.

Enterprise Applications Integration Considerations 118
Explains how to send customer profiles to Enterprise Applications, user customer template records, and discusses differences in the Enterprise Edition.

Overview

In the QAD Customer Relationship Management (QAD CRM) system, a profile is a business that has an association with your organization. A profile can be a customer, prospect, competitor, or supplier. Details of a profile include office addresses, contact people within the organization, and information about the organization, such as its annual turnover and the number of employees. A profile record also includes information on how you evaluate the concern for business purposes.

Contacts are people working for a profile, with whom you communicate for conducting business-related activities. Your company maintains its relationships with the profiles in its database through these respective contacts. For example, you may contact a manager working for a profile to make a business appointment. In this case, the manager is a contact person. There can be more than one contact person specified for a profile.

The Profiles module forms the core of the QAD CRM system. It is designed to assist you in managing your profile and contact details effectively. You can specify comprehensive customer information here that becomes the basis for other major modules like Opportunities, Campaigns, Activities, and Reports. If you enable QAD ERP integration on your system, you can transfer profile information to QAD ERP and receive customer information from QAD ERP. Using the Generic Data Import utility of QAD CRM, you can import profile and contact details from external sources. The Profiles module ensures easy creation and maintenance of database records that can later be used extensively in sales and marketing efforts.

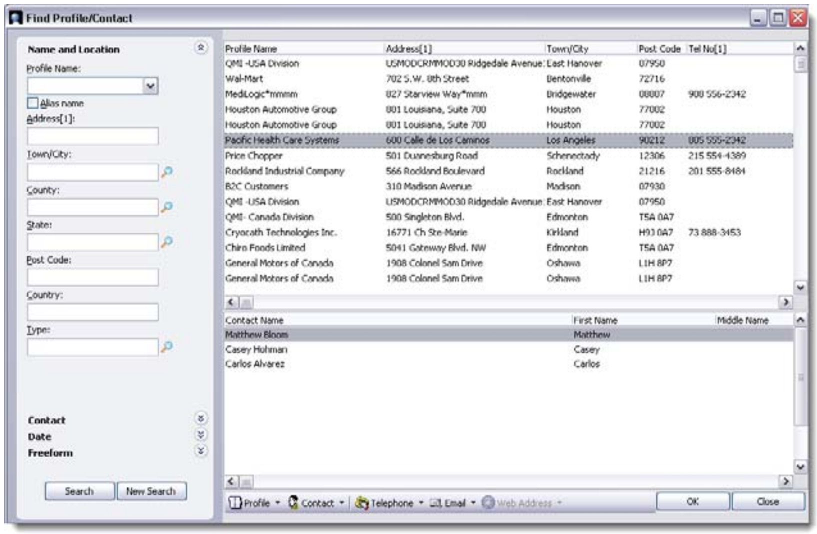
Searching Profiles and Contacts

As you use the system, over a period of time, you can have a large database of profile and contact details. When the list of profiles and contact persons becomes large, locating specific details becomes tedious.

The system provides a powerful search facility to help you locate specific profiles and contact persons. Using this feature, apart from finding the required profiles and contacts, you can also perform various tasks related to them. These tasks include editing profile and contact person records, copying the profile address label to a clipboard, and generating reports.

The Search a Profile or Contact facility finds and displays records that match the search criteria you specify. To start a search, choose Main Menu|Sales/Marketing Management|Addresses|Search a Profile or Contact.

Fig. 7.1
Search a Profile or Contact



You can perform a search based on any of the criteria described in the following table.

Table 7.1
Search Options in Profiles and Contacts

Search Criteria	Action
Name and Location	Enter any or all of the listed fields that include profile or alias name, address, town/city, county, state, post code, country, and profile type.
Contact	You can search for a contact by giving name details, position description, or mail groups the contact belongs to.
Date	This search allows you to enter a date range, and displays all records created or modified during the selected period. It also helps to search profiles or contacts by their creation or modification dates.
Freeform	Select the basis of the search by clicking a radio button. The available options are Profile, Contact, Site Address, and Transaction History. For example, you can perform conditional search for history text. Click the Transaction History radio button. Enter the field operator values as Notes contains Send Quotation. The system displays all records where the text “Send Quotation” appears for processed activities. You can also enter an associated condition. For example, you are looking for the profile type Architect. Select the Profile radio button. Select Type from the Field drop-down. Select a Condition and apply an appropriate value to it, as in the profile type begins with Ar. Click Search to display a list of profiles who are architects.

Note The system performs the search only on the basis of the open or highlighted tab. Information entered in other tabs is not taken into account.

You can define multiple search conditions using the Search a Profile or Contact facility.

Example If you enter `Town/City` as `New York` and select `Type` as `Customer`, the system will match both. So only those profile records will display where `Town/City` matches `New York` and `Type` matches `Customer`.

You can also perform a search by using the Search button available on the CRM toolbar. This button is available for the All Profiles and Contact Persons sub-modules only. This search option picks preferences left to right, and displays records top to bottom. It also lets you specify conditions for an extended search.

Searching Profiles and Contacts Using Keyboard Inputs

You can search for profiles and contacts from other locations within the system by entering certain character combinations. Wherever Profile and Contact widgets appear together on the screen, you have two options to select values for these fields:

- Click the Profile and Contact buttons to open the Find Profile/Contact window.
- Enter pre-defined character combinations and press Tab.

Fig. 7.2
Profile and Contact Search

You can enter character combinations as shown in the following table:

Table 7.2
Keyboard Inputs for Searching Profiles and Contacts

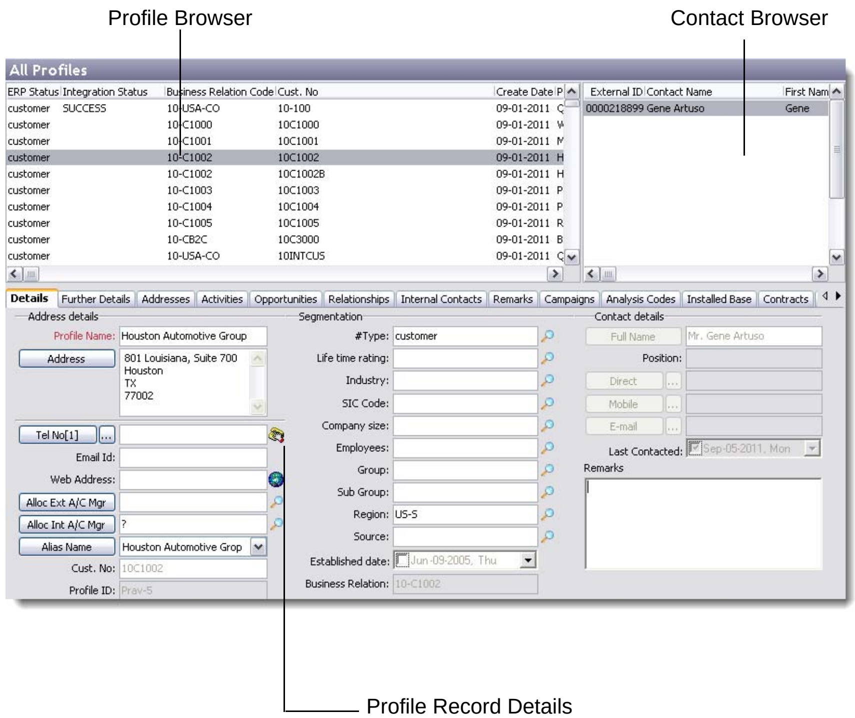
Option	Keyboard Input Required
Select Profile	Enter one of the following and press Tab key: • <profile name><comma><post code> • <profile name> • <comma><post code>
Select Contact	Enter one of the following and press Tab key: • <forename><comma><last name> • <forename> • <comma><last name>

Working with Profiles

Choose Main Menu|Sales/Marketing Management|Addresses|All Profiles to open the All Profiles screen. This screen has three parts—the top half contains the profile and contact browsers while the bottom half displays profile record details.

The profile browser displays the list of profile records in the database, while the bottom half opens the selected record in edit mode. If you select multiple profile records from the browser, you can view details for the last selected record. The contact browser displays the contact details for the selected profile record. You can right-click this area and add, edit, copy, or delete contact details.

Fig. 7.3
All Profiles



There are multiple ways to edit a profile record. Select the record and do one of the following:

- Click the Edit button on the toolbar.
- Right-click and choose Edit.
- Choose Edit from the File menu.

Note Similar options are available for Add and Delete.

To view the list of profile records where the names start with a specific letter or character, click the appropriate letter or select the character from the drop-down list before the alphabet buttons. To view the list of all contact persons, click the All button after the alphabet buttons.

Note You can choose to show or hide the alphabet buttons through the toolbar option View|Alpha Tabstrip.

You can add, modify, and delete profile records from the All Profiles sub-module. You can also send profile details to remote nodes for data synchronization purposes. If QAD ERP integration is enabled, profile information can also be sent to the QAD ERP application database using the Send to QAD ERP option.

You can access and edit details of the contacts associated with a selected profile from this sub-module directly. To do so, select a contact from the browser, and click the Contact button on the toolbar. Select the required tab. The Contact Details screen opens to let you view or edit contact details.

Adding Profiles

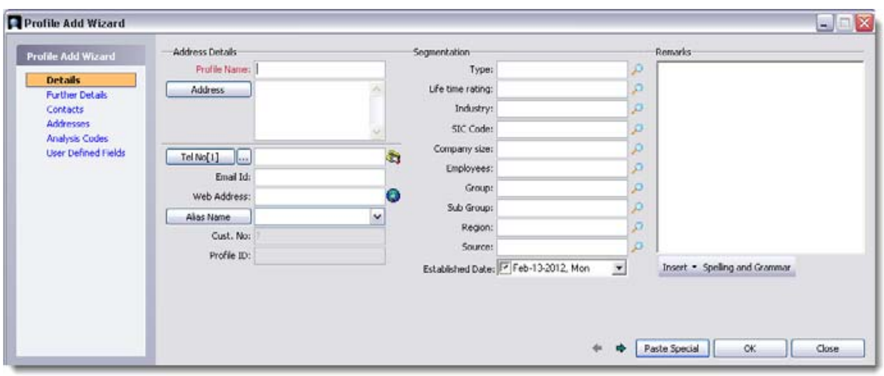
You can add details for a new profile in different ways. One method is to select the Quick Profile option from the Add a Profile button on the toolbar. This displays the Add Profile screen where you can record some basic details for a new profile.

The alternate method is to select the Detailed Profile option from the Add a Profile button on the toolbar. This displays the Profile Add Wizard with the following tab links:

- Details
- Further Details
- Contacts
- Addresses
- Analysis Codes
- User Defined Fields

Enter the required details in these tabs and save the record to add a new profile to the system database.

Fig. 7.4
Profile Add Wizard



Note If QAD ERP integration is enabled, when you add a new profile the system prompts you to save the new profile record in the QAD ERP application as well. If you choose `Yes` then the new profile record is updated in QAD ERP.

You can also access the Profile Add Wizard if you right-click the All Profiles browser and choose Add from the menu. Otherwise, click the Add button on the toolbar or choose Add from the File menu to add a new profile record.

You can also add profiles by uploading records from an external source using the Generic Data Import tool. In such a scenario, profile information may be supplied as a database list from a list supplier. For details, see *Administration Guide: QAD Customer Relationship Management*.

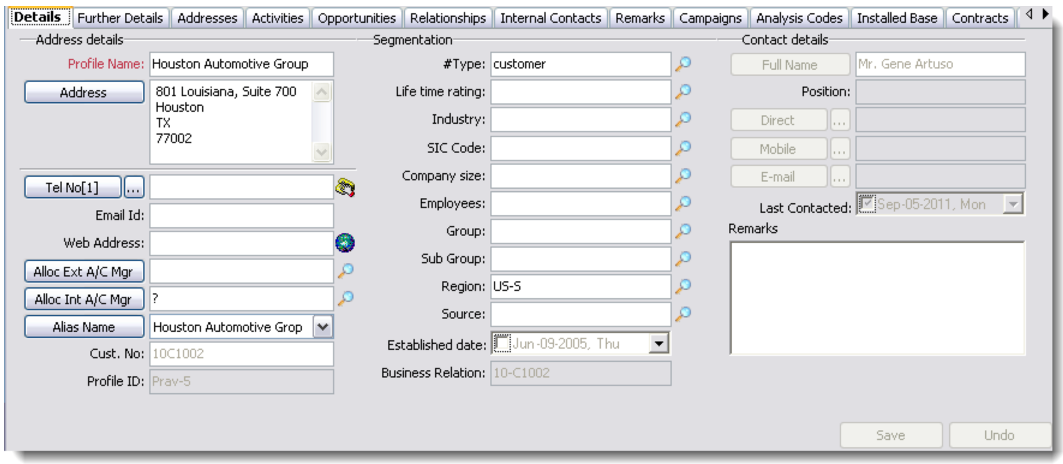
Maintaining Profiles

Use the Profile Details screen to maintain information related to a specific profile.

Click the Profile drop-down button on the system toolbar, and select the tab you want to view or edit. The Profile Details screen displays with the selected tab open.

Note The Profile drop-down button is not available when you are using the Profile module itself but it is available on the system toolbar at all other locations where profiles are used.

Fig. 7.5
Profile Details



Note The Profile Details screen is identical to the tabs that display in the lower area of the All Profiles screen. You can also access the Contact Details screen from the Profile Details screen by clicking the Contact button on the bottom left corner. This is the same as the Contact Persons screen. For details, see “Adding Contacts” on page 112.

Details

Use the Details tab to record basic information about a new profile.

Profile Name. Enter the profile name of the new record. This is a mandatory field.

Address. Click the Address button to open the address dialog box. Enter address details in the dialog box and save. If some address style is already defined by your system administrator, the information displayed in the address dialog box reflects the defined address style. For more details on the Address Style option, see *Administration Guide: QAD Customer Relationship Management.*

Telephone Number, Email ID, Web Address. Enter these other contact details in these fields. You can click the Tel No[1] button to enter more details. The ... button lets you add up to three telephone numbers and one fax number.

Allocate Account Managers. Choose the external and internal account managers through the buttons and look-ups provided.

Note Internal and external account managers are pre-assigned in the system based on certain criteria such as Region, Country, Profile Type, and so on. They are allocated through the Territory Management module. For details, see *Administration Guide: QAD Customer Relationship Management*.

Example If you click the Alloc Ext A/C Mgr or Alloc Int A/C Mgr buttons, the system displays the names of the account managers who are allocated to this profile, depending on the criteria and settings defined in Territory Management. However, if you click the look-ups, the names of all account managers in the system display. If you choose an account manager from the look-up list, that name overrides the account manager suggestion given by the system.

Alias name. Click the Alias button to enter an alias name for the new profile record. You can create multiple aliases for a profile.

Customer Number. Enter a customer number for the profile. This number can be used later as a reference for billing and finance purposes, and for tracking opportunities and sales.

Note The Customer Number field is editable only if QAD ERP integration is not enabled. Otherwise, the customer number is assigned from QAD Enterprise Applications directly once the information between the two applications is synchronized. When QAD ERP integration is enabled, this field cannot be updated.

Important In the current release of CRM it is not possible to set the Enterprise Applications Customer Number manually. If a stand-alone profile record is integrated with QAD Enterprise Applications at a later date, the value for the Customer Number field is over-written by the value assigned by the creation of the customer record in Enterprise Applications.

Profile ID. The system assigns a unique number to each new profile record. While the Profile ID field is non-updateable, the profile number sequence is configurable. You can change or set the number to a particular sequence, if required. Contact your system administrator for any changes.

To generate Profile IDs, the system picks the next number available in its records and prefixes the company ID to it.

Example If the company ID is `Sports` and the next available number is `3562`, the profile ID generated would be `Sports-3562`.

Segmentation. The fields in this section pertain to marketing-related information for the new profile. You can use the look-ups provided to classify the new profile based on industry, rating, company size, and other such details.

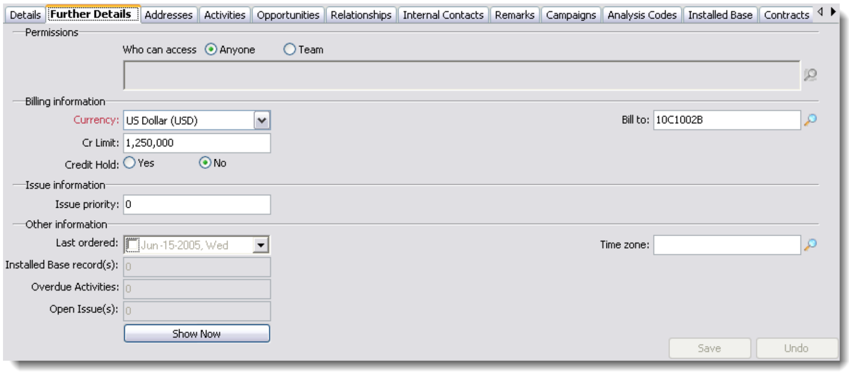
Business Relation. This field only appears if the integrated Enterprise Applications system is the Enterprise Edition. The business relation code is either copied from Enterprise Applications when the profile has been created in response to a customer supplier or end-user created in Enterprise Applications, or the value is generated in response to sending a profile from CRM to become a customer in Enterprise Applications.

Contact Details. The fields in this section display contact-related details such as name, contact number and email address.

Further Details

Use this tab to enter further details such as viewing permissions, billing information, and issue information. This tab also lets you view other information through counters for installed base records, overdue activities, and open support issues.

Fig. 7.6
Profiles: Further Details



Who Can Access. In the Permissions area, specify the access rights to the profile you are creating. If the profile is being created for a team, any end user who is logged in but not a part of the team will not be able to view this profile. If you click the `Anyone` option then the profile record can be accessed by all logged-in users.

Bill To. Use the look-up to specify a value for this field. The Bill To field stores the customer number of the profile you choose as the billing party. After specifying a value for this field, if you add opportunity quotes for this profile, the bill to information is automatically picked by the system from this field.

Issue Priority. Enter an issue priority value for all issues related to the current profile record.

Note You can assign a default priority to issues from a particular profile by assigning the issue priority value in the Further Details tab in All Profiles. When you create a new issue record for the profile at a later date, the system automatically assigns the priority value you mention in the Issue Priority field here.

The following fields appear in the Other Information section of the Further Details tab.

Installed Base Records. The value for this field is picked by the system from the Installed Base module. If a customer has an existing installed base record then it will display here.

Overdue Activities. The value for this field is picked by the system from the Activities module. It provides a count of the number of activities that are overdue for a particular profile.

Note An activity becomes overdue when it has passed its due date but has not been processed.

Open Support Issues. This field displays the number of open support issues against the selected profile. The value for this field is picked by the system from the Issue Management module.

Time Zone . Select the appropriate time zone for the profile record from the look-up provided here.

Addresses

The Addresses tab screen has three parts. One part lists all the addresses recorded for a profile. This area lets you add, edit, copy, or delete any address details listed. The second part displays contacts associated with a particular profile address. This is a view-only area. The third part lets you add additional addresses to the selected profile record.

You can set up multiple address types—Default, Ship-to, Bill-to, and Branch—for a single profile record. For example, when customers place an order for a product, they can have the invoicing and the delivery at different addresses. So while you would send the invoice to the Bill-to address, the product delivery could be made at the Ship-to address.

Select the Default Mailing Address check box if you want to set the selected address as default. The default mailing address marked through the Addresses tab shows up in the profile records displayed in the browser, and not the primary address that you enter through the Details tab.

Activities

You can use this tab to view and manage activities associated with the selected profile. You can add, edit, copy, delete, or process activities from this tab directly.

Two views at the bottom of this window let you view both planned activities and activity history.

Note The History view here functions at the profile level, and not at the activity level. So you can view all the activities planned or performed for a selected profile.

You can choose the View Reading Pane option if you want to see the comments recorded with each activity record. To access this option, either right-click the Activity tab area and select from the menu, or choose from the Options button.

For more details on activities, see “Working with Activities, Tasks, and E-mails”.

Opportunities

Use the Opportunities tab to view and manage opportunities associated with the selected profile. You can add, edit, copy, or delete opportunities from this tab directly.

Two views at the bottom of the right side of this window let you view both description and opportunity lines.

For more details on opportunities, see “Working with Opportunities” on page 73.

Relationships

You can use this tab to manage the hierarchical relationship details of the selected profile. This tab lets you view, add, attach, or delete organizational hierarchy for the selected profile.

The tab screen area has two parts—hierarchical and sub-hierarchical relationships within an organization display in the left side of the screen while profile, contact, opportunity, and installed base details associated with each hierarchy entry display in the right side.

The two views at the bottom left let you view a list of all the hierarchies associated with the profile, as well as the direct one-to-one relationships shared by this profile with others.

Internal Contacts

Use the Internal Contacts tab to add, edit, copy, or delete details of contacts within your organization. While adding an internal contact, you can also assign the contact as a specified customer service representative for your organization. To do so, select the CSR check box and the Default CSR check box, if required.

Remarks

The Remarks tab lets you add any notes that you may want to record for the selected profile. You can also insert profile or contact names, keywords, or the date and time, or import a file into the notes you are making. A spelling and grammar check option is also available.

Campaign

Use this tab to view and edit campaign details associated with the contacts of the selected profiles. The campaign tab screen has two parts. The left side displays the Campaign IDs of the campaigns associated with the selected profiles. The right side displays the associated campaigns, listed by stage.

You can click the appropriate radio button below to choose whether to display details of all the contacts of the selected profiles, or only of a particular contact. You can also add more targets to the listed campaigns or edit stages for the listed profiles from this tab.

Analysis Codes

Use the Analysis Codes tab to set codes and groups for the selected profile. A profile can have multiple analysis codes and analysis groups. Analysis codes and groups are set up by the system administrator. For details, see *Administration Guide: QAD Customer Relationship Management*.

To add a group, select an option from the Select an analysis group drop-down list and click the Add button next to it. This displays the associated codes. If you want to select all available groups in the system, click the Select All Groups button.

Select or clear the group code check boxes as required. Click the save button to record your selection in the system.

Choose your view options from the radio buttons provided. To view all group codes, select All.

Installed Base

Installed bases are collections of locations where the products or services of your organization are implemented and used. If a profile uses more than one product or service, multiple installed base records are associated with it. Installed Base information is replicated from the Service and Support module in Enterprise Applications when the customer uses the Service and Support capability.

The Installed Base tab screen has two parts. The left side displays a list of the sites and products that are associated with the profile while the right side displays any notes that are on record. The Profile Details screen lets you add, edit, copy, and delete details of locations where the products and/or services are implemented.

Contracts

Use this tab to view or maintain service contracts for the selected profile. The Contracts tab screen has two parts. One part lists the contracts or contract quotes associated with the selected profile; the other part displays the contract lines. Select the appropriate radio button to choose between contracts and quotes.

To add a new contract or a new quote, right-click the left side of the screen and choose Add from the menu. The Service Contract Details screen displays. Enter the contract number and other details regarding contact, billing information, pricing, and so on, and save the record.

Note The Contract Number that you enter while adding a new contract is used as a unique identifier for each contract. However, once it is saved you cannot edit the contract number.

To add Contract Lines, right-click the right side of the screen and select Add Line from the menu. The Contract Line Details screen opens where you can select the end user and define service type, price, and billing information. You can add multiple contract lines for a single contract or quote.

User-Defined Fields

You can set user-defined frames and fields for profiles, and view them through this tab. User-defined frames and fields let you add parameters to each record as required.

Note Only a system administrator can create user-defined frames and fields through Main Menu|Settings|System|User-Defined Fields. For details, see *Administration Guide: QAD Customer Relationship Management*.

Attachment

The Attachment tab lets you attach a document from your hard disk to the system. Right-click and select Attach Document from Hard Disk from the menu to attach a document of your choice. You can also choose the display view of the attachments by selecting from the options available in the right-click menu.

You can also detach, open, or view the properties of a selected attachment. Right-click and choose the required option from the menu.

Note In order to share documents from the Attachment tab and view them successfully, make sure that the documents are attached from a shared network drive that is accessible to all users in a team or business unit. If any user attaches a document from their local hard drive to QAD CRM through the Attachment tab, it will not be accessible to others.

Script

Use this tab to add new scripts and process or delete existing ones. You can also replace script codes or other columns that display here.

When you right-click and select Add from the menu, the Script Details window displays. Choose the contact and the script code you want to attach to the selected contact, with the help of the look-up provided.

When you choose to process a script, the Processing Script window opens. This window displays all the questions that form part of the selected script. You can directly enter the customer responses in this window and save them.

You can create scripts through the stand-alone Scripts module. For more details, see Chapter 13, “Maintaining Scripts,” on page 154.

Issues

This tab lets you maintain issue-related information for the selected profile. To log details for a new issue, right-click and choose Add from the menu. This displays the Issue Details screen, where you can enter the Product ID, Assigned To, Service Queue, and other fields with the help of the look-ups and drop-down lists provided.

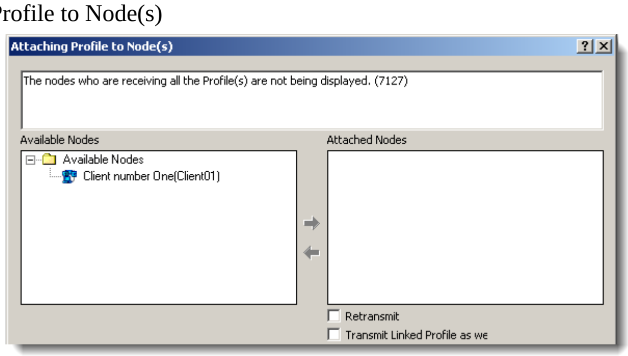
For more details regarding the Issue Details screen, see “Defining Issue Details” on page 194.

Attaching Profiles to Nodes

You can attach profile records to remote nodes from this module. This option is useful for data synchronization purposes, especially in a scenario where an organization has multiple branches spread across various geographical locations.

1. To send profile records to a remote node, select the required profiles from the browser list.
2. Right-click and choose Send to Remote Node from the menu. Alternatively, choose the Send to Remote Node option from the File menu. The Attaching Profile to Node(s) window displays.

Fig. 7.7
Attaching Profile to Node(s)



3. Use the arrow keys to move selected nodes between the Available Nodes and Attached Nodes boxes.
4. Select the Retransmit or Transmit Linked Profile As Well check boxes as required and save your selection.

You can check for the profiles that you attached to the remote node in Data Synchronization| Remote Node Setup. For more details about data synchronization, see *Administration Guide: QAD Customer Relationship Management*.

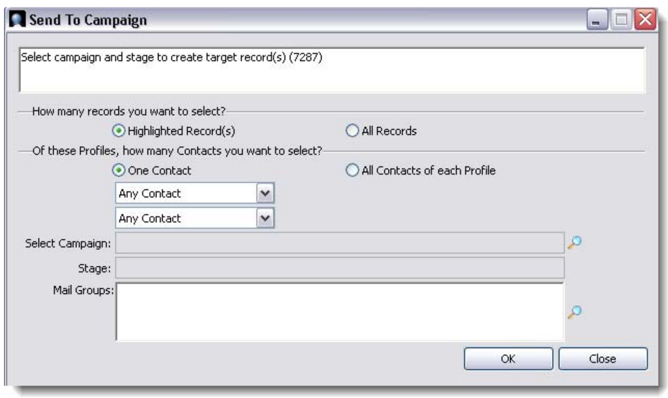
Sending Profiles to Campaign

You can send details of profile records directly to marketing campaigns from this module. The profiles and their contacts are used as targets for various campaigns.

1 To send profiles to a campaign, select the required profiles from the browser list.

2 Right-click and choose Send to Campaign from the menu. Alternatively, choose Send to Campaign from the File menu or click the Send to Campaign button from the toolbar. The Send To Campaign window displays.

Fig. 7.8
Send To Campaign



3 In the Send To Campaign window, select the number of records you want to include in the campaign. Choose the contacts from the drop-down lists.

4 Select the campaign and the mail group with the help of the look-ups provided.

Note If you select a mail group, make sure that the selected contacts are included in that mail group. Otherwise the campaign will not consider these contacts as potential targets.

5 Save your selection. The system displays a message confirming the number of targets selected and created, and the campaign that they are now attached to.

When you go back to the All Profiles screen and check the Campaign tab of the selected profiles, the associated campaigns and their stages display there.

Copying Address Label to Clipboard

You can copy the address labels of selected profiles to the Windows clipboard directly from this module. Select the profile records from the browser list, and right-click and choose Address Label to Clipboard. The system displays a message confirming that the selected records have been copied to the Windows clipboard. You can then paste the labels into an application such as Excel.

Viewing Reports

When you choose Report View from the right-click menu, the system generates a browser report for the selected records. However, you can also access standard reports directly from here.

To view standard reports, choose Report|Standard Reports from the right-click menu in All Profiles. This will show you a list of all the standard reports attached to this view. The Profile Summary Report is available by default. For details on reports, see Chapter 11, “Using Reports,” on page 137.

Sending to QAD ERP

This option appears in the right-click menu only if QAD ERP integration is enabled. It lets you send the selected profile records to the QAD ERP application. Using this option creates a customer record for the selected prospects in the QAD ERP application database.

To send information on selected profile records, right-click the workspace area and choose Send to QAD ERP. You can also choose this option from the File menu. The system displays a message confirming that the selected records have been sent to the ERP application.

Note Since profile records can contain details of customers, suppliers, and competitors also, you have to manually select those prospect records that you wish to integrate with the QAD ERP application. The Send to QAD ERP option of QAD CRM sends information to the cm_mstr and ad_mstr tables of the QAD ERP application.

Viewing the Customer Console

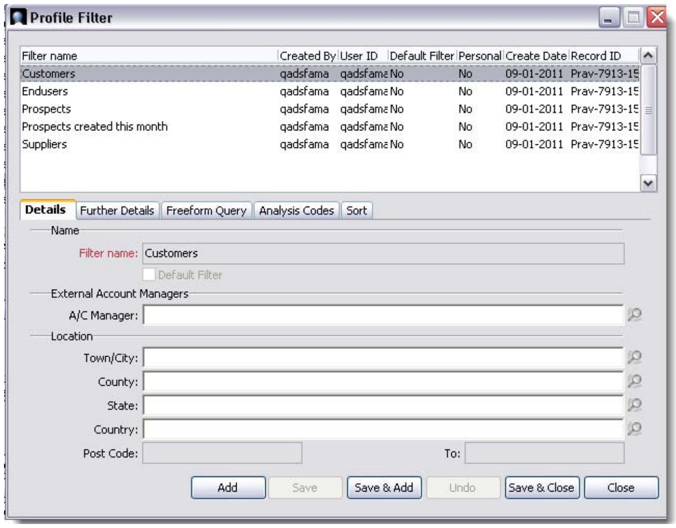
You can view the customer console for the selected profile record through this option. The customer console is basically a viewer that receives information from the QAD ERP application database. For more details on the customer console, see Chapter 9, “Customer Console,” on page 125.

Filtering Profile Records

Typically, the system includes a large number of profile records. To help you manage these records, the system provides a filtering feature. You can define conditions for filtering profile records based on your needs. For example, you can define a filter to display records of profiles located in a specific country or city.

The filter utility is flexible and provides you with several options for filtering records. Use the Filter drop-down list on the top panel to select a filter for the records displayed. Otherwise, right-click the workspace area and choose Filter from the menu. You can also choose Filter from the File menu. This displays the Profile Filter screen, with a list of available filters.

Fig. 7.9
Profile Filter



Note The Profile Filter screen opens in the edit mode. You can modify data on any of the tabs.

The Profile Filter screen also lets you define a new filter, specify users who can use your filters, and indicate sort options for displaying the filtered records.

To add a new filter, click the Add icon at the bottom right of the Profile Filter screen. The screen now displays in add mode.

Note The Profile Filter screen also contains a Delete icon for deleting existing filters.

Details

Use the Details tab to name your filter and provide settings. You can enter values in some or all of the optional fields.

Filter Name. Provide a filter name for the new filter you are defining. Select the Default Filter check box if you want to set this as the default filter option.

A/C Manager. Select the External Account Managers for the new filter you are creating.

Location. Enter any or all of the listed location related fields that include Town/City, County, State, and Country.

Post Code/To. Enter the post code of the location that you want to set as a filter. Optionally, use the To field to define a range.

Further Details

Use this tab to define filter settings on the basis of profile segmentation and company details. You can select the Internal Contacts check box if you want to display those profiles where you are an internal account manager. This tab is useful for filtering records from a marketing perspective.

Freeform Query

Select the Freeform Query check box on this tab to enable the Field, Condition and value drop-down lists. This tab lets you add up to five freeform query conditions based on which the system filters the records for display.

Analysis Codes

Use this tab to define a filter based on analysis groups or analysis codes. Select the relevant radio button, and then use the look-ups provided to enter the required details.

Permission

This tab displays the default viewing permissions. You can change the default and make the new filter visible to others as well. Choose specific teams and their members who can have access to this filter. You can also block access for certain users.

Note Enter an asterisk (*) in the Enter Teams Who Can Share This Filter field to allow viewing access to all teams.

Sort

Use this tab to sort the displayed records based on varied criteria, in ascending or descending order. Select the desired criteria from the drop-down lists provided. You can specify up to three sort conditions.

Maintaining Profile Relationships

Use the Profile Relationships sub-module to represent the relationships among profiles in an organizational hierarchy. For example, a holding company may have many companies under it. One of these companies may own a group of other companies. It is useful to record organizational hierarchy as it can assist you in making decisions, learning more about prospective and present customers, and using this information to strengthen sales pitch and marketing efforts.

You can view, specify, and delete organizational hierarchy for profiles. You can also manage details of the relationship a profile organization has directly with another profile organization.

Existing hierarchies display in the Profile Relationship screen. The screen has two parts—hierarchical and sub-hierarchical relationships within an organization display in the left side of the screen, while profile details associated with each hierarchy entry display in the right side.

Choose Main Menu|Sales/Marketing Management|Addresses|Profile Relationships to open the Profile Relationship screen.

Fig. 7.10
Profile Relationships

Profile

Use the Profile tab to view the list of profiles attached to the selected hierarchy level.

Contact

Use the Contact tab to view the list of contact persons associated with the profiles you have attached.

Opportunities

Use the Opportunities tab to view the list of business opportunities that the attached profiles offer.

Installed Base

Use the Installed Base tab to view the list of products installed at a profile site.

Maintaining Hierarchies

You can add or delete hierarchies or sub-hierarchies from the Profile Relationship screen.

1 To add a hierarchy or a sub-hierarchy, select the parent level, right-click the mouse and select Add Hierarchy or Add Sub Hierarchy. A new level is formed.

   Note This menu also contains options for deleting the selected hierarchy level.

2 Edit the name of the new hierarchy level as required and press Enter.

From the list of organization hierarchies listed, expand the hierarchy whose details you want to view. The hierarchy structure displays.

To view the profiles belonging to a particular hierarchy or sub-hierarchy, select the level. The list of profiles in the Profile tab refreshes to display the attached profiles.

Note Select the Include sub-hierarchy check box to view a list of all profiles associated with the selected hierarchy level and its sub-hierarchy entries. Leave it clear to view profiles of the selected level only.

1 To add profiles to a hierarchy level, select the level and right-click the Profile tab area.

2 Select the Attach Profile option. The Find Profile/Contact dialog box displays.

   Note This menu also contains options for detaching existing profiles.

3 In the Find Profile/Contact dialog box, specify the conditions for searching a profile or select a profile from the list displayed.

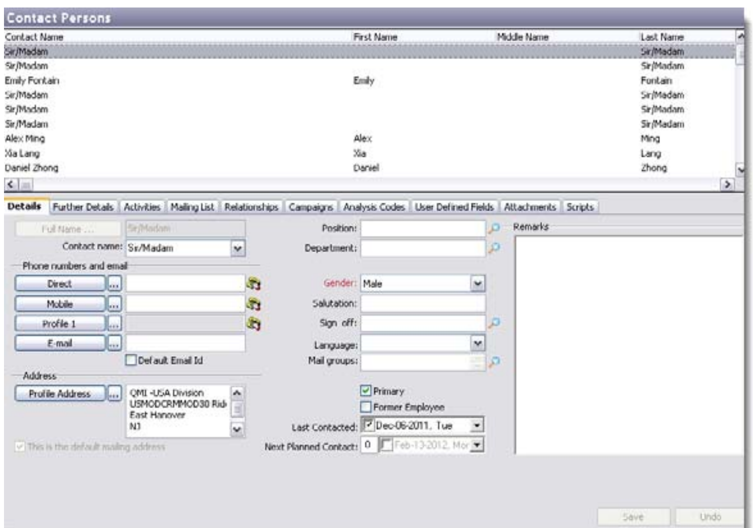
4 Double-click the selected profile to attach it to the relevant organizational hierarchy level.

Working with Contacts

The Contact Persons sub-module is specifically 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.

Choose Main Menu|Sales/Marketing Management|Addresses|Contact Persons to open the Contact Persons screen. This screen has two parts—the top half is a browser displaying the list of contact person records in the database, while the bottom half opens the selected record in edit mode.

Fig. 7.11
Contact Persons



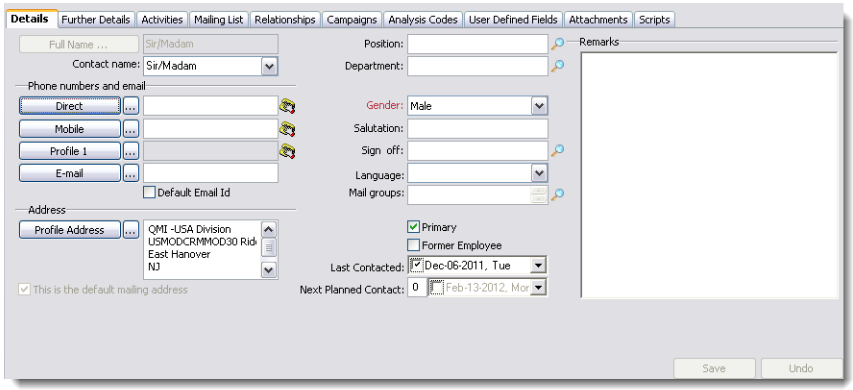
There are multiple ways to choose to edit a contact record. Select the record and do one of the following:

- Click the Edit button on the toolbar.
- Right-click and choose Edit.
- Choose Edit from the File menu.

Note Similar options are available for Delete and Copy.

You can also access contact records by clicking the Contact drop-down button on the system toolbar, and selecting the tab you want to view or edit. The Contact Details screen displays with the selected tab open.

Fig. 7.12
Contact Details



To view the list of contact persons whose names start with a specific letter or character, click the appropriate letter or select the character from the drop-down list before the alphabet buttons. To view the list of all contact persons, click the All button after the alphabet buttons.

You can access and edit details of the profile for which a selected contact works from this sub-module directly. To do so, click the Profile button on the toolbar and select the required tab. The Profile Details screen opens to let you view or edit profile details.

Maintaining Contact Details

You can add, copy, modify, and delete contact records. You can also send their details to marketing campaigns as targets.

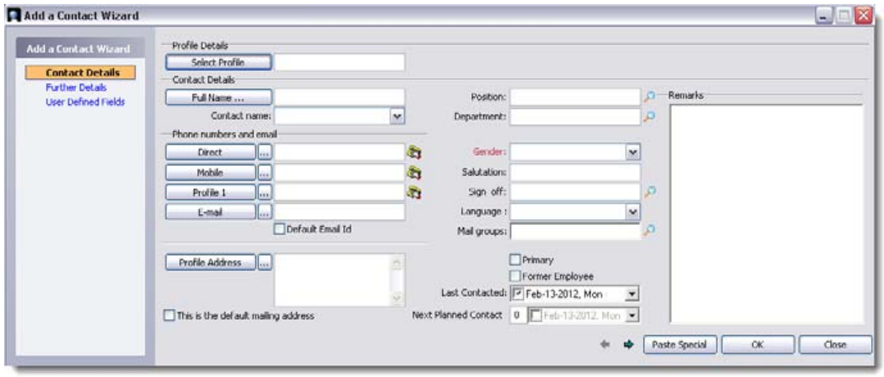
Adding Contacts

You can add details for a new contact in two different ways. One method is to click the New Contact from a Different Profile button on the toolbar. This displays the Add a Contact Wizard with the following tab links:

- Contact Details
- Further Details
- User-Defined Fields

The Add a Contact Wizard lets you select the associated profile by searching through the list of profiles in the database.

Fig. 7.13
Add a Contact Wizard



Note Conversely, while adding details for a profile through the Profile Add Wizard, you specify details of its contact persons. You can also view, edit, and add details for contact persons through the All Profiles module. For details, see “Maintaining Profiles” on page 98.

The second method is to click the New Contact From the Same Profile button on the toolbar. This opens the bottom half of the Contact Persons screen in add mode. You can also choose this option from the right-click menu or the File menu.

Details

Use the Details tab to record basic information about a new contact.

Full Name. Enter the full name of the new contact.

Show as. Enter the contact name in the format as you want it to display in all lists.

Phone numbers and Email. In this section, enter all the different phone numbers of the new contact. Enter the Email address and set it as default by selecting the Default Email Id check box.

Address. This field refers to the profile address, and is populated automatically by the system.

Note If you click on the drop-down button in this field, the system lets you select which address you want to record and display here. You can choose Other Site Address, Personal Address, or Native Address instead of Profile Address.

Position, Department, Gender, and other fields. Enter these details for the new contact through the look-ups and drop-down lists provided.

Primary or Former Employee. Select the relevant check box to indicate whether the new contact is an existing employee or a former one.

Contact Dates. Indicate the dates when this contact person was last contacted, and when the next contact is planned.

Notes. Enter any notes you want to record for this contact.

Further Details

Use this tab to enter further details such as inputs regarding methods of communication. Select the preferred means of communication from the drop-down list available. This tab also lets you add personal information for the new contact.

Activities

You can use this tab to view and manage activities associated with the contact. You can add, edit, copy, delete, or process activities from this tab directly.

Two views at the bottom of this window let you view both planned activities and activity history.

You can choose the View Reading Pane option if you want to see the comments recorded with each activity record. To access this option, either right-click the Activity tab area and select from the menu, or choose from the Options button.

Mailing List

The Mailing List tab displays the defined Inclusion list in the left side and the defined Exclusion list on the right. Those lists that the selected contact is in appear with the check box selected.

To attach an inclusion or exclusion mail list to a contact, select the adjoining check box and click Save. Similarly, to detach an inclusion or exclusion mail list from a contact, clear the adjoining check box and click Save.

For details about inclusion and exclusion lists, as well as defining mailing contact preferences, see Chapter 15, “Maintaining Contact Mailing Preferences,” on page 183.

Relationships

The Relationships tab screen has two parts—Relationship with Our Account Managers and Relationship with Other Profiles. You can add profile details to any of these areas. You can also edit, copy, or delete any of the existing details.

When you right-click in the Relationship with Our Account Managers area and select Add from the menu, the Internal Associates window displays. Click the User ID look-up to open the Select Associated ID search window. Choose the required name from here. You can select between current employees and past employees.

The two views in the Relationship with Other Profiles area lets you see attached profiles from both the previous company and the currently associated company.

Campaigns

Use this tab to view and edit campaign details related to selected contacts. The campaign tab screen has two parts. The left side displays the Campaign IDs of the campaigns associated with the selected contacts. The right side lists the associated campaigns by stage.

You can add more targets to the listed campaigns or edit stages for the listed contacts from this tab. For more details, see “Sending Contacts to Campaigns” on page 117.

Analysis Codes

Use the Analysis Codes tab to set codes and groups for the new contact. A contact can have multiple analysis codes and analysis groups.

To add a group, select an option from the Select an Analysis Group drop-down list and click the Add button next to it. This displays the associated codes. If you want to select all available groups in the system, click the Select All Groups button.

Select or clear the group code check boxes as required. Click the save button to record your selection in the system.

Select your view options from the radio buttons provided. To view all group codes, select All.

User-Defined Fields

If user-defined frames and fields are set up for contact persons, you can view or edit them through this tab. User-defined frames and fields give you the flexibility to add parameters to each record based on your unique requirements.

Note Only a system administrator can create user-defined frames and fields through Settings|System|User-Defined Fields. For more details, see *Administration Guide: QAD Customer Relationship Management*.

Attachments

The Attachments tab lets you attach a document from your hard disk to the system. Right-click and select Attach Document from Hard Disk from the menu to attach a document of your choice. You can also choose the display view of the attachments by selecting from the options available in the right-click menu.

You can also detach, open, or view the properties of a selected attachment. Right-click and choose the required option from the menu.

Note In order to share documents from the Attachment tab and view them successfully, make sure that the documents are attached from a shared network drive that is accessible to all users in a team or business unit. If any user attaches a document from their local hard drive to QAD CRM through the Attachment tab, it will not be accessible to others.

Scripts

Use this tab to add new scripts, and process or delete existing ones. You can also replace script codes or other columns that display here.

When you right-click and select Add from the menu, the Script Details window displays. Choose the script code you want to attach to the selected contact with the help of the look-up provided.

When you choose to process a script, the Processing Script window opens. This window displays all the questions that form part of the selected script. You can directly enter the customer responses in this window and save them.

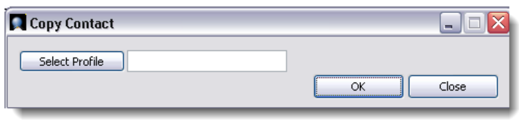
You can create scripts through the stand-alone Scripts module. For more details, see Chapter 13, “Maintaining Scripts,” on page 154.

Copying Contacts

You can copy a contact record and associate it with another profile apart from the current one. This 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 button on the toolbar. Alternatively, select Copy from the File menu or right-click and select Copy from the menu. The Copy Contact pop-up displays.

Fig. 7.14
Copy Contact



2 Click the Select Profile button. The Find Profile/Contact window opens.

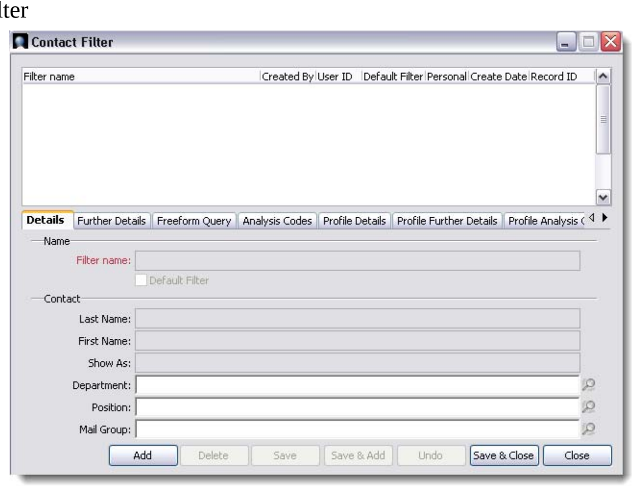
3 Search for the profile with which you want to associate the new contact record you are creating, and click OK. This attaches the contact record to the selected profile.

Filtering Contacts

As in the case of profiles, after sustained use, the system contains an extensive database of contact records. In such conditions, the filtering feature of the system helps you manage these records in the best manner by letting you create filters according to your requirement. For more details on using filters, see "Filtering Profile Records" on page 107.

The Contact Filter screen gives you the option to define filters at the profile level for selected segments.

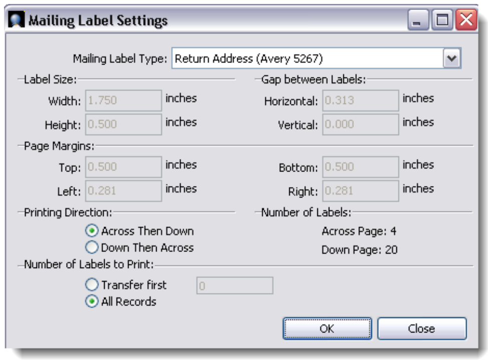
Fig. 7.15
Contact Filter



Printing Mail Labels

You can print mail labels directly from the Contact Persons screen. Select the contact records from the browser, right-click and choose Print Mail Labels. The Mailing Label Settings window displays.

Fig. 7.16
Mailing Label Settings



Choose the mailing label type from the drop-down list. The label dimensions and page margins are hard-coded and change depending on the label type you choose. Select the printing direction of the label and the number of labels to print, and save the record.

This creates an output file in Crystal Reports with proper mailing label format. Select the appropriate paper size, and click the Print button to print the mailing labels.

Sending Contacts to Campaigns

As with profile records, details of contact records can also be sent directly to marketing campaigns from this module. For more details, see “Sending Profiles to Campaign” on page 106.

When you have successfully sent contacts to a campaign, the system displays a confirmation message. View the Campaign tab of the selected contacts on the Contact Persons screen to see the associated campaigns and their stages listed there.

Synchronizing Contacts

Before synchronizing contacts, ensure that the exchange server settings are properly configured and you are authorized by the system administrator for synchronizing data between Microsoft Exchange Server and QAD CRM. For details, see “Maintaining Exchange Server Settings” on page 47.

Depending on the synchronization policies, changes to the synchronized contacts made either on Microsoft Exchange Server or on QAD CRM can be automatically synchronized. For more details, see “How Contact Synchronization Works” on page 18.

Synchronizing QAD CRM contacts to Microsoft Outlook

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, you must 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 contacts 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, you must create a QADCRM category first. For information on creating a QADCRM category, see “Configuring Microsoft Outlook” on page 16.

To synchronize contacts:

1 Create a new 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 are synchronized to QAD CRM until the next synchronization is performed.

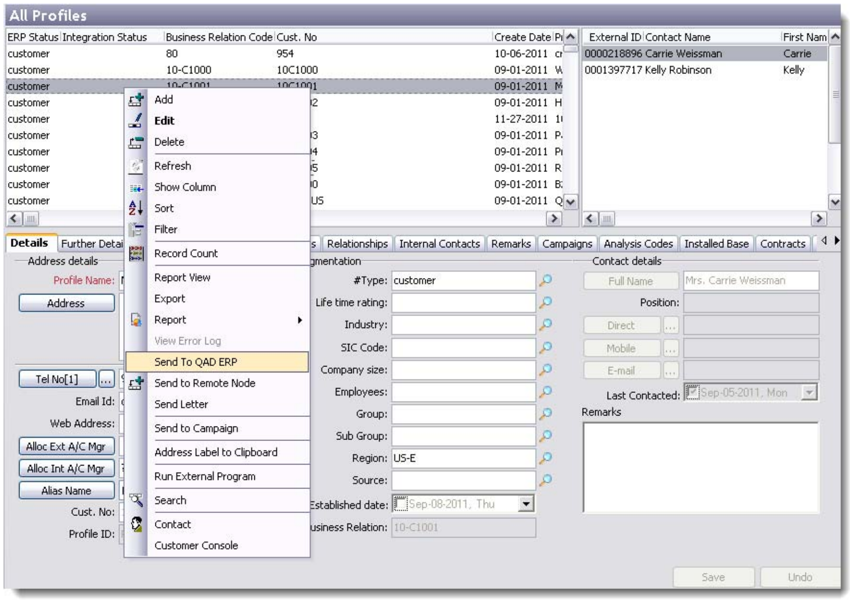
Enterprise Applications Integration Considerations

As profiles are maintained in QAD CRM, data can optionally be sent to QAD Enterprise Applications. These options are only made available if the integration settings identified in QAD ERP settings for Addresses are set appropriately. See the *CRM Administration Guide* for details on these settings and how they affect the operation of the integration. The following discussion assumes that the integration settings are all selected as active.

Sending Customer Profiles to Enterprise Applications

When a profile is newly created in CRM, the user is prompted to send the profile to Enterprise Applications. The user can choose to do so at this point or optionally to send the profile to ERP at a later point by selecting the profile in the browse in the All Profiles function and using the right-click menu option as shown below.

Fig. 7.17
All Profiles Functions



If the integrated system is QAD Enterprise Applications Standard Edition, the integration creates a customer record in the appropriate domain in Enterprise Applications. The integration uses the standard ERP function to automatically allocate the next customer number. This customer number is stored in the Cust No field on the profile in CRM. In addition, the ERP Status value is set to “Customer” and if it is not already present, the value “Customer” is also added to the Profile Type field.

Customer Template Records

CRM does not supply all of the data necessary to create a customer in QAD Enterprise Applications. Instead, the system uses a template customer record to copy default values from. These templates exist by domain, so each domain has its own template record. Template records are discussed in more detail in the *CRM Administration Guide* and should be maintained when the system is configured.

As a general rule, the customer in QAD Enterprise Applications is created by taking a copy of the predefined template and then overlaying the template values with the field values supplied by CRM.

Differences for the Enterprise Edition

For the Enterprise Edition, the process is different; in this case not only is a customer created but also a business relation. The same template mechanism is employed for default data, but in this case requires both a business relation template and a customer template

When the customer is created in QAD Enterprise Applications, both the business relation and customer code values are auto-generated and returned to be stored against the profile.

Additionally, any contacts available against the profile in CRM will be created against the business relation in Enterprise Applications along with any addresses created in CRM that correspond to supported address types in Enterprise Applications.

A final consideration is that customers created in the Enterprise Edition require the update of fields in the Customer Data Maintenance function to enable them to be transacted. QAD CRM does not perform this final update when the Customer is created by sending it from Profile Maintenance.

Receiving Profiles and Updates from Enterprise Applications

Customers, suppliers, and end users can be received from Enterprise Applications as profiles in CRM. There are two mechanisms for this.

Initial Data Load

Typically, this function is run when the system is configured and ideally when all customer and supplier data has been loaded into Enterprise Applications.

Instant Update

This mode is active whenever a user is logged on to the system. Effectively, any updates to customers, suppliers, and end users that occur in Enterprise Applications will automatically create or update the relevant profile records in QAD CRM. The ERP Status field will reflect the QAD Enterprise Applications type of Profile—Customer, Supplier, or Enduser—and the Cust No field will reflect the customer or supplier number from QAD Enterprise Applications. In addition the Type field in CRM will also be updated to reflect Customer, Supplier, or End User.

The profile will be created in the business unit that corresponds to the domain in which the update occurs.

Differences for the Enterprise Edition

If a business relation in the Enterprise Edition has more than one linked supplier or customer, QAD CRM will create each linked supplier or customer as a profile sharing the same business relation code.

Example Business relation Colossal Conglomerates has associated two customers, Colossal Spain and Colossal France, and also a supplier, Colossal Germany. In CRM there are three separate profiles created with ERP Status set to Customer or Supplier as required and all displaying the same business relation code on the Profile Detail tab.

Contact information—which for the Standard Edition is taken from the first contact in the Customer Data Maintenance function—will now be taken from the multiple contacts available for the business relation.

Chapter 8

Maintaining Currencies

This section describes how to maintain currencies. It discusses the following topics:

Overview 122
Explains how currencies are used and maintained in the module.

Maintaining Currencies 122
Explains how to use Currency Maintenance.

Maintaining Exchange Rates 123
Explains how to use Exchange Rate Maintenance.

Overview

Today business organizations often handle information about products that originate outside their own national borders. Consequently accommodating multiple foreign currencies and establishing exchange rates is a common business practice.

The Currencies module in the Sales Management folder provides a full set of functions that enables your system to support product pricing information.

Use the Currencies module to define currencies and maintain exchange rates. You must define one currency as your system base currency. You can define as many other currencies as your company uses.

Maintaining Currencies

Currencies identify specific monetary units. The currency browser displays currencies currently defined in your system. Use the Currency Maintenance screen to maintain currency codes for your base currency as well as any other currencies your company uses.

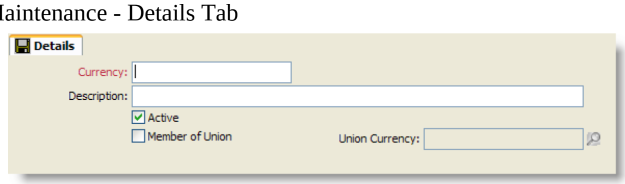
Note Some currency types are provided during installation. If your QAD CRM system is integrated with a QAD ERP application, the initial data load procedures synchronize currency and exchange rate information between QAD CRM and the QAD ERP application.

You also can maintain exchange rates if you use multiple currencies in your system. For details see "Maintaining Exchange Rates" on page 123.

1. Choose Sales Management|Currencies|Currency Maintenance.
2. Right-click the Currency Maintenance browser and choose Add from the menu.

   Note This menu also contains options for deleting and editing existing currencies.

Fig. 8.1
Currency Maintenance - Details Tab



Currency. Enter a unique code for the currency.

Description. Enter a description. Typically this identifies the country the currency belongs to and the full name of the currency.

Active. Select the check box to make the currency available for use in the system.

Member of Union. Select the check box if the currency is part of an economic union such as the European Union (EU).

Union Currency. Only available if the Member of Union check box is selected. Enter the union currency.

Maintaining Exchange Rates

An exchange rate is the current market price for which one currency can be exchanged for another. The system uses exchange rates in order to display prices for items such as opportunities and products that are denominated in a currency other than the base currency of the system. For example, all quotes and order prices are calculated in a target currency in addition to the base currency.

Note Some currency codes are provided during installation. If your QAD CRM system is integrated with a QAD ERP application, the initial data load procedures synchronize currency and exchange rate information between the applications.

Use the Exchange Rate Maintenance screen to maintain exchange rates. The Exchange Rate Maintenance browser displays the exchange rates currently defined for the selected currencies.

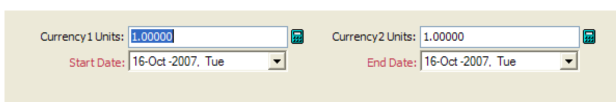
Note When exchange rate data is modified, records for items that should reflect the new exchange rate are updated by the system only when opened by a user.

1. Choose Sales Management|Currencies|Exchange Rate Maintenance.

2. Right-click the Exchange Rate Maintenance browser and choose Add from the menu.

   Note This menu also contains options for deleting and editing existing exchange rates.

Fig. 8.2
Exchange Rate Maintenance



Currency1. Enter a source currency.

Currency 2. Enter a target currency.

Currency 1 Units. Enter the source currency units. (Enter 1.0 to indicate this is the source currency exchange rate.)

Currency 2 Units. Enter the target currency units. For example, how many units of Currency 2 is worth a unit of Currency 1?

Start Date. Enter the date on which this exchange rate becomes effective.

End Date. Enter the date on which this exchange rate becomes ineffective.

Chapter 9

Customer Console

This section describes how to work with the customer console module of the QAD Customer Relationship Management (QAD CRM) application. It discusses the following topics:

Overview 126
Explains what the Customer Console is used for.

Working with the Customer Console 126
Explains how to use the customer console search criteria and view customer console search results.

Using the Go To Option 127
Explains how to use Go To in the Customer Console.

Managing Data Using QAD ERP 128
Explains how to manage data in the .NET UI.

Overview

The Customer Console provides an all-round view of a customer record, as it displays combined data from both the QAD ERP application and the CRM system. Use the customer console to get a comprehensive analysis for the selected customer records.

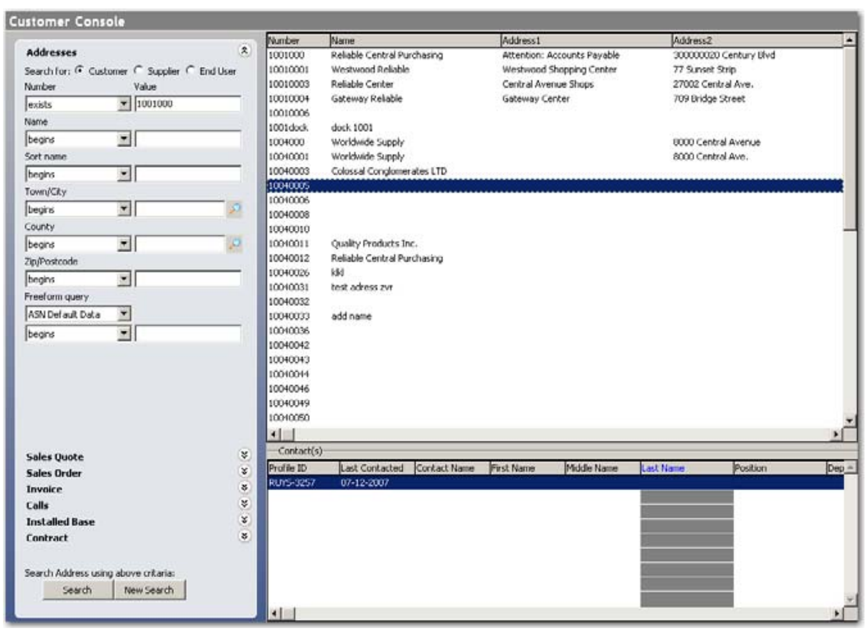
Working with the Customer Console

The Customer Console module lets you search for customer records from the QAD ERP application database. The Customer Console main screen provides a search facility based on varied criteria. When you run a search, the screen acts as a viewer that receives information from the QAD ERP application database and lists records that match your search criteria.

Customer Console Search Criteria

To start a search, choose Main Menu|Customer Console. The system performs the search only on the basis of the open or highlighted tab. Information entered in other tabs is not taken into account. You must enter at least one search criterion to search for records; otherwise, the system returns no records and prompts you to enter criteria.

Fig. 9.1
Customer Console - Search



You can perform a search based on any of the criteria described in the following table.

Table 9.1
Search Options in Customer Console

Search Criteria	Action
Addresses	Select the appropriate radio button depending on the address type you want to search for—customer, supplier, or end user. Enter criteria in any or all of the listed fields that include number, name, sort name, town/city, county, zip/post code, and freeform query.
Sales Quote	You can search for a customer record by giving sales quote details such as quote value or quote date.
Sales Order	You can search for a customer record by giving sales order details such as order value, order date, purchase order, or quote details.
Invoice	You can search for a customer record by giving invoice details such as invoice value, invoice date, or invoice purchase order details.
Issues	You can search for a customer record by giving issue details such as issue ID, issue serial, item number, end user, or end user name.
Installed Base	You can search for a customer record by giving installed base details such as end user value, end user name, item number, or serial number of the product.
Contract	You can search for a customer record by giving contract value details.

Note All the above search criteria allow you to run a search based on freeform queries.

Customer Console Search Results

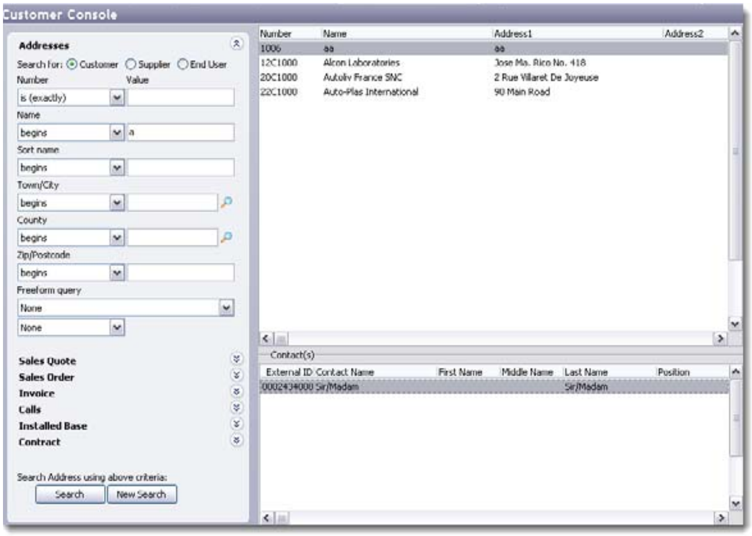
The records matching your search criteria are listed in the viewer. Two options related to the QAD ERP application are available through the right-click menu here:

- Go To
- Go to QAD ERP

Using the Go To Option

Choose Go To from the right-click menu to display the customer console for the selected record. Depending on your choice of tab, the customer console opens with the selected tab highlighted.

Fig. 9.2
Customer Console



The console displays primary customer information in the Main tab at the top left. Additional tabs include Comments, Invoice, Customer, and Remit-To. These additional tabs are visible only if the required information is available from the QAD ERP application. The top right of the console displays contact, account manager, engineer, and salesperson details. The bottom half of the customer console displays additional tabs:

Activity	Installed Base	Sales History
Sales Quote	Contract	Statistic
Sales Order	Relationship	Ship-To
Invoice	Comparative Sale	End User
Issue	Account	

Most of these tabs get their data input from the QAD ERP database. However, the Activity and Relationship tabs receive their data from the system.

The customer console shows up only for those records that have a customer number assigned to them in the QAD ERP application database. The system validates the customer number of the selected record when you right-click and choose this option. Only if a customer record with the same customer number exists in the QAD ERP application database, the system displays the customer console screen. Otherwise, it displays an error message or makes this option appear unavailable.

You can edit only that data in the customer console that is derived from the QAD CRM database. This includes managing activities through the Activities tab, adding or attaching hierarchies and sub-hierarchies through the Relationship tab, and maintaining Contact details by double-clicking the contact name.

Managing Data Using QAD ERP

You can use the Go to QAD ERP command from the right-click menu to launch QAD ERP through the QAD .NET UI. You can then log in and access records directly. For example, you might use this feature to view or update sales quotes.

You must have access to the QAD .NET UI to use this command. You must perform a client install in order to use the .NET UI. For details on setting up the link with QAD ERP, refer to *Administration Guide*: *QAD Customer Relationship Management*.

You must have a valid user ID and password defined in QAD ERP. Menu access is subject to menu security and other restrictions.

See your system administrator for information.

Chapter 10

Maintaining Products

This section describes how to maintain products, product lines, unit of measure codes, and VAT codes. It discusses the following topics:

Overview 132
Explains how the system features allow the use to maintain different product-related information.

Maintaining Products 132
Explains how to use the Product Details screen.

Maintaining Product Lines 134
Explains how to use the Product Line Details screen.

Maintaining Unit of Measure Codes 135
Explains how to use the Unit of Measure browser.

Overview

Using the system features, you can easily maintain product-related information to suit your business requirements. For example, you can maintain detailed information about a specific product, including unit of measure information, value added tax (VAT) codes, and inventory details such as quantity and warehouse location. You also can group products that are similar into a product line.

Note Product, product line, and other product-related information can be defined using the Products folder in both the Sales Management and Marketing Management folders.

Maintaining Products

Use the Product Details screen to maintain information relating to a specific product.

You can group products that are similar into a product line; for details, see "Maintaining Product Lines" on page 134.

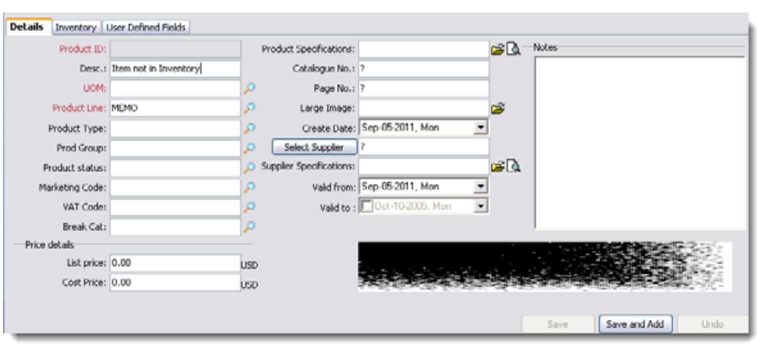
1. Choose Sales Management|Products|Product or Marketing Management|Products|Product. The Product browser displays the products currently defined in the system.
2. Right-click the Product browser and choose Add from the menu. The Product Details screen fields are cleared.

   Note This menu also contains options for maintaining existing products.

Details

Use the Details tab to record identifying information for a product, such as the product ID, unit of measure, and price details.

Fig. 10.1
Product Details



You can attach an image of the product for visual reference by using the Large Field; the image appears in the lower-right corner of the screen.

Product ID. Enter a unique code for the product.

Description. Enter a description for the product.

Unit of Measure (UOM). Enter a unit of measure for the product.

Product Line. Enter a product line to associate this product to.

Product Type. Enter a product type for the product. Used for classification purposes.

Product Group. Enter a product group for the product. Used for classification purposes.

Product Status. Enter a product status for this product. For example, Active or Expired.

Marketing Code. Enter a marketing code for the product. This code is used by the QAD Marketing Management module for tracking purposes.

Break Category. Enter a break category code for the product.

Price break categories let you assign volume price breaks for multiple items. Discounts can be calculated based on the quantity or amount ordered on multiple lines of a sales order or quote. Use this field if you offer a discount to customers if a certain quantity of the product is purchased.

Note This field is used only when QAD CRM is integrated with a QAD ERP application.

Price Details. Enter a Unit Price and Cost Price. The system uses the base (default) currency defined for your organization.

Product Specifications. Enter the location on your system or network of a file containing product specification data.

Catalog Number. Enter the issue number of a catalog that contains advertising for this product.

Page Number. Enter a page number to identify the location of the advertising material.

Large Image. Enter the location of the product image to associate with the product.

Allow selection as brochure/sample. Select this option if a product brochure or product sample is available.

Create Date. Enter the date on which the product details were entered. This field is editable—you can select a future/past date.

Select Supplier. Enter the supplier of the product.

Supplier Specifications. Enter the address of a specification file or Web page.

Valid from. Enter a date from which the product can be sold.

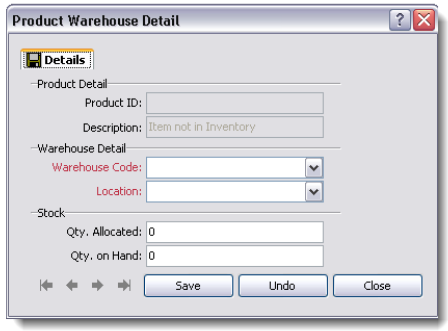
Valid to. Enter a date on which sale of the product should end. After this date has passed the product is no longer available for selection in the opportunity.

Notes. Enter any further identifying information.

Inventory

Use the Inventory tab to record inventory and warehouse location information for a product. This information is generally maintained for managing the inventory for marketing materials within CRM and does not integrate or relate to Inventory Details stored in Enterprise Applications.

Fig. 10.2
Inventory Details



Warehouse Code. Enter a code to identify where the stock of the product is stored.

Location. Enter a location for the warehouse.

Quantity Allocated. Enter the quantity of products allocated for distribution. In the Qty on Hand field, enter the total number of products in the warehouse.

Quantity on Hand. Enter the quantity of the selected product in the warehouse.

User Defined Fields

Use the User Defined Fields tab to capture other types of product-related information from the system database as defined by your organization's marketing requirements.

For details on user-defined fields, refer to the *Administration Guide: QAD Customer Relationship Management*.

Maintaining Product Lines

A product line is a user-defined category that groups products that are similar. For example, you can create an Audio-Video product line to group individual products such as audio and video cassettes, compact disks, digital video disks, and so on.

Use the Product Line Details screen to maintain information relating to a specific product line. Use the Products tab to maintain the products associated with the product line.

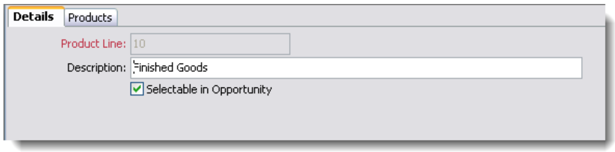
You also can define details for individual products; for details, see "Maintaining Products" on page 132.

1 Choose Sales Management|Products|Product Line or Marketing Management|Products|Product Line. The Product Line browser displays the product lines currently defined in the system.

2 Right-click the Product Line browser and choose Add from the menu.

 Note This menu also contains other options for maintaining product lines.

Fig. 10.3
Product Line Details



Product Line. Enter a unique code for the product line.

Description. Enter a description for the product line.

Allow Selection as Brochure/Sample. Not currently used.

Selectable in Opportunity. Select this option if the product line should be available for selection in the Opportunity module.

Maintaining Unit of Measure Codes

Units of measure are values that specify any type of quantifiable unit and are typically associated with products. Units of measure might describe dimensions, weights, volumes, or amounts of a particular product. Examples defined in the system include values such as each (EA), milliliter (ML), or pound (LB).

Example Your organization sells automotive components. A product such as wiring employs a unit of measure that uses weight; a cooling system component employs a unit of measure that uses a single component (EA).

Use the Unit of Measure Details screen to maintain unit of measure codes.

1. Choose Sales Management|Products|Unit of Measure or Marketing Management|Products|Unit of Measure. The Unit of Measure browser displays the units currently defined in the system.
2. Right-click the Unit of Measure browser and choose Add from the menu.

   Note This menu also contains other options for maintaining units of measure.

Fig. 10.4
Unit of Measure Details

Unit of Measure (UOM). Enter a unit of measure code.

Alternate UOM. Enter an alternate unit of measure code.

UOM Conversion. Enter a ratio of the unit of measure to the alternate unit of measure.

Product ID. Enter a product associated with this unit of measure.

Description. Enter a brief description of the unit of measure.

Chapter 11

Using Reports

This section describes how to create and run reports. It discusses the following topics:

Overview 138
Explains how reports help users make more informed decisions.

Using the Reports module 138
Discusses different report types, and how to run reports, view reports, and save reports.

Maintaining Report Category Details 140
Discusses the two default report categories and how to add categories.

Using Standard Reports 141
Lists standard reports and describes how to filter them.

Adding External Reports 142
Explains how to use the External Report Details screen.

Creating Browser Reports 143
Describes different methods of creating and modifying reports.

Using the Report Writer 144
Explains how to use the Add a Report wizard with details on Report Writer settings.

Maintaining Your Dashboard 145
Discusses different dashboard components and how to manage them.

Managing Output Channels 146
Explains how to use the Export option to choose output channels for reports.

Overview

Reports help decision makers analyze diverse aspects of a business before making strategic decisions. The QAD Customer Relationship Management (QAD CRM) system offers several reports for your benefit. While some of these reports are delivered with the system, you can also generate custom reports from the information in the database.

The system also gives you the flexibility to choose varied output media for its reports. You can output the reports to external applications as well.

Using the Reports module

To access the Reports module, go to Main Menu|Sales/Marketing Management|Reports. This displays the Reports screen, with a list of the report categories, and the reports available under each category.

Fig. 11.1
Reports

Understanding Report Types

The system offers two types of reports:

- External reports
- QAD CRM generated reports

External Reports

There are two types of external reports:

- Those supplied with the system are called standard reports.
- Those that you add can be saved by any name, under any category of your choice. External reports can be added directly from the Reports screen, or by saving new instances of the existing standard reports. For details, see “Adding External Reports” on page 142.

QAD CRM-Generated Reports

There can be two types of QAD CRM-generated reports:

- Those reports that are viewed and then saved from a browser are called browser reports.

- Those that are created using the Query Builder and the Report Writer are called user-defined reports. For details, see “Creating Browser Reports” on page 143 and “Using the Report Writer” on page 144.

Running Reports

You can select an external report and run it directly from the Reports screen. There are multiple ways to run a report. Select the report and do one of the following:

- Click Run this report on the toolbar.
- Right-click and choose Run this report.
- Choose Run this report from the File menu.

Note Similar options are available for Edit and Delete.

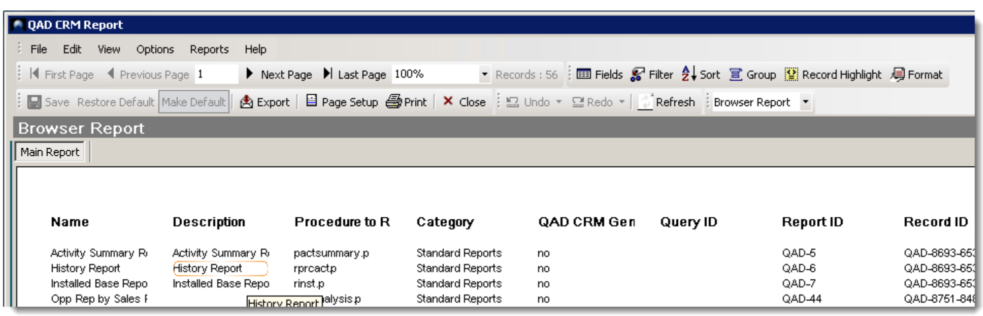
You can run browser reports from any browser within the system. Right-click and choose Report View to display a browser report. You can control the number of records to display in a browser report. For details, see “Report Settings” on page 38.

However, the following kinds of reports can be run only from the location where you save them:

- New instances of browser reports that have been saved under the Send To or Browser Reports category
- Custom reports that have been created using the Report Writer, and belong to the Send To or Browser Reports category

Such reports appear in the drop-down list that displays when you run a browser report from the same location.

Fig. 11.2
Running Reports Generated Using Report Writer



Note While saving these reports, it is recommended that you include the report location in the Description field for easy reference at a later date.

Viewing Reports

When you run a report, it opens in the report viewer. The report viewer displays all reports in the same manner, regardless of their category. The viewer interface is made up of the following components:

- Application menu bar and toolbar
- Filter selection bar

- Data section, where the actual report displays
- Report status bar

When you display a report, the system lets you choose the output format, change the page setup, define print options, and close the report using the toolbar or the File menu.

Saving Reports

When you run an external report, the system lets you create a new instance of it by modifying its parameters. You can save this new instance from the viewer directly. There are multiple ways to save an external report:

- Click Save on the toolbar.
- Choose Save from the File menu.

Choosing Save opens the External Report Details screen. For details, see "Adding External Reports" on page 142.

When you run a browser report from any module, the Save option appears in gray. However, if you change any settings using the filter toolbar, you can save the displayed browser report with a new name.

If you choose Save, only the report settings get saved, and not the data itself. But if you choose Save As, a report record, with the new report name, gets saved in the browser reports category. However, you can run these reports only from the location where you saved them; see "Running Reports" on page 139.

Note You cannot select a category when saving browser reports from the report viewer.

Maintaining Report Category Details

The system lets you categorize report formats based on your requirements. The Standard Reports category includes standard reports supplied with the system. However, you can create and maintain other categories, such as Browser Reports and Dashboard, to store custom report formats.

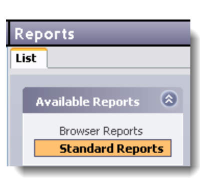
The current version of the system provides two different categories of reports:

- Standard reports
- Browser reports

Categorizing reports helps you access them easily. For instance, if you have five reports based on profile records that you frequently use, create a category named Profile Reports and save all these reports under that category.

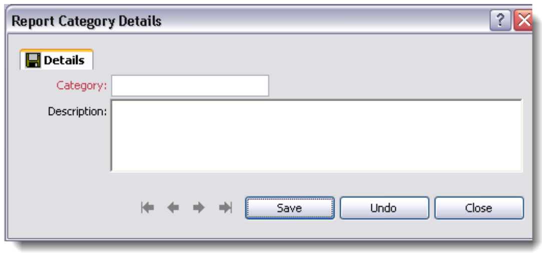
1 To add a category, right-click the Available Reports bar or the arrow sign next to it.

Fig. 11.3
Add Category-Available Reports



2 Choose Add category from the menu to display the Report Category Details window.

Fig. 11.4
Report Category Details



3 Enter the category name and description, and save the record to add a new report category.

Similar options are available for editing and deleting categories if you right-click any existing category name.

Note Though you can delete Standard Reports, this option is not recommended.

Using Standard Reports

The current version of the system includes eight standard reports in predefined formats that cannot be modified. The standard reports are:

- 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

The names of these reports indicate the nature and scope of the data they extract. While all the standard reports display in the Crystal Reports format by default, the Installed Base Report displays in the Microsoft Excel format. For more details on exporting report data, see “Managing Output Channels” on page 146.

In the Reports screen, the status of standard reports in the QAD CRM Generated column always shows as `No`.

Filtering Standard Reports

The system lets you define filters for viewing standard reports. The filter criteria work in two ways. For some reports, the filter criteria can be defined from the report viewer itself; for others, it appears before the actual report is displayed.

The filter criteria can be defined from the report viewer directly by clicking the Filter button. This option works for the following reports:

- Activity Summary Report

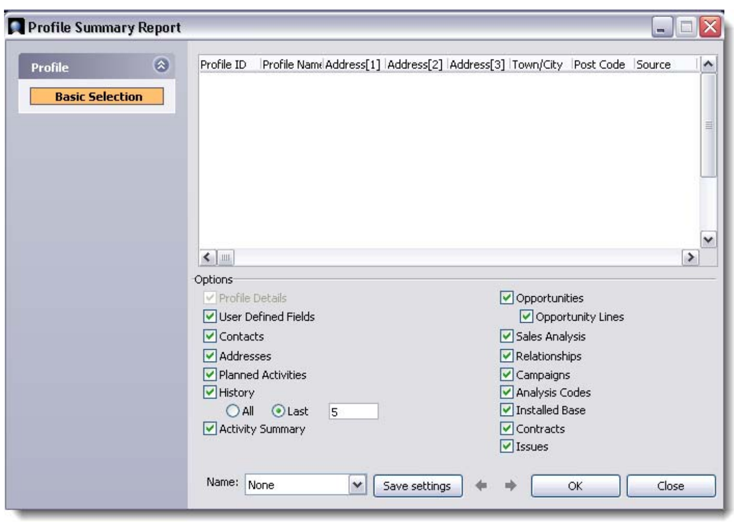
- History Report
- Planned Activity Report
- Synchronization Status Report
- User Summary Report

After defining the filter settings, click View Report to display the report according to your specifications. Use the Filter button to adjust the display area for the actual report.

The Filter button does not appear on the toolbar for those reports where the selection criteria are defined before the report display. When you run these reports from the Reports screen, a filter settings window displays where you define the selection criteria. This option works for the following reports:

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

Fig. 11.5
Profile Summary Report - Filter Settings



If your QAD CRM system is integrated with the QAD ERP application, the Profile Summary Report filter settings window displays an additional filter called QAD ERP options.

As for standard reports, you can similarly filter all external reports.

Adding External Reports

The system lets you add or edit external reports from the Reports screen. Right-click and choose Add External Report to open the External Report Details screen.

Details

Name. Enter a name for the report you are adding. This is a mandatory field.

Description. Enter a description for the new report.

Category. Enter a new category or use the look-up to choose the appropriate category for the new report. This is a mandatory field.

Report ID. Enter a unique code for the report, if required.

Procedure to Run. Choose the procedure through which you want to run this report by specifying the path to an executable program file. This is a mandatory field.

Note The Procedure to Run field appears populated if you open the External Report Details screen by saving from a report display.

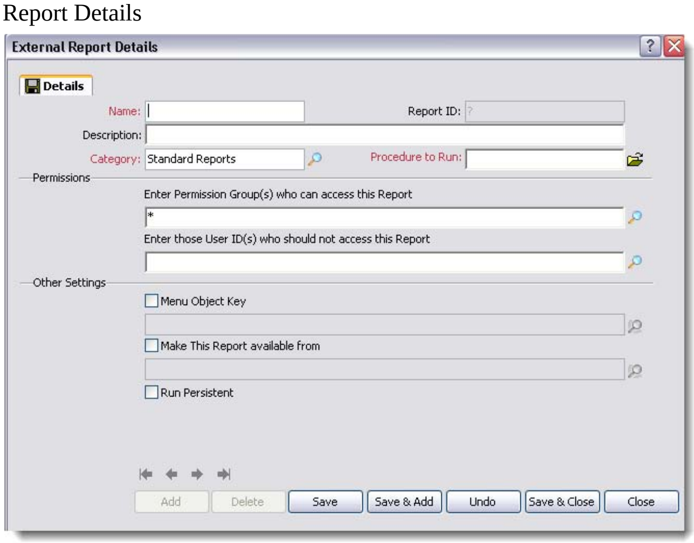
Permissions. Use the look-up buttons to choose access rights to the report you are adding. Type asterisk (*) to give access to all user groups.

Menu Object Key. Select this check box if you want to access the report from some other module in the CRM menu. Use the look-up to choose the alternate modules.

Make available this Report from. Select this check box if you want to access the report from some other screens in the system. Use the look-up to choose the screens.

Run Persistent. It is recommended that you keep this check box selected to reduce the time taken to load reports.

Fig. 11.6
External Report Details



Save the record to list the new report in the Reports screen under your chosen category. You can now run, edit, or delete it like any other external report.

Creating Browser Reports

You can create browser reports in the system through any of the data screens. By definition, browser reports provide a report layout of the records displayed in the 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 modify the settings of the report through the toolbar buttons, then save new instances of a displayed browser report. For details, see “Saving Reports” on page 140.

Using the Report Writer

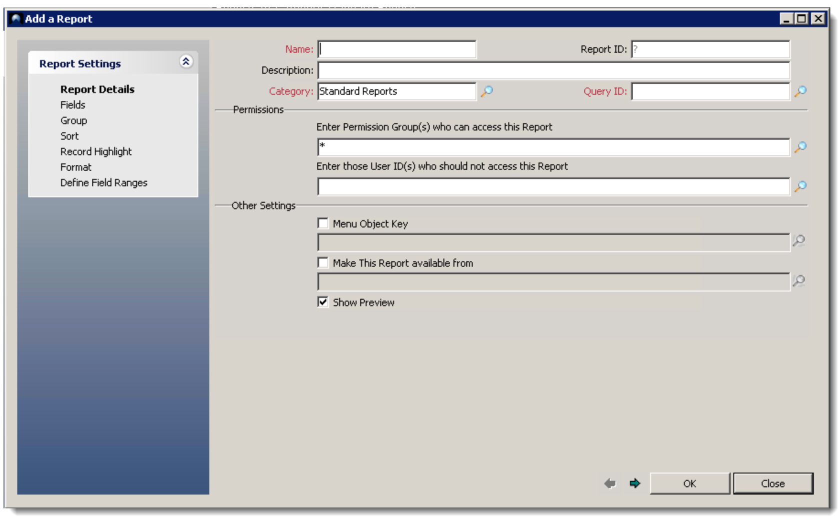
You can generate various custom or user-defined reports through the Reports module. These reports are created using the Report Writer, and can be saved under any category.

System administrators are typically responsible for defining and maintaining formats for user-defined reports. These formats are defined through MainMenu|Settings|Reports and Queries|Query Builder. For details, see *Administration Guide: QAD Customer Relationship Management*.

Depending on the formats, you can create and edit custom reports using the Report Writer, also called the Add a Report wizard.

To open the Add a Report wizard, right-click the Reports screen and choose Add Report using QAD CRM Report Writer. The Report Writer lets you design report formats and categorize them as required. These formats define the conditions, tables, and fields to be used to extract data for browser reports.

Fig. 11.7
Add a Report - Report Writer



When you save the settings defined through the Report Writer, the new report is added under the category you have chosen. You can run the created browser reports. The above options show up as buttons on the toolbar (see Figure 11.2), giving you the flexibility to change settings from the report display itself.

The Report Writer lets you define the settings described in Table 11.1.

Table 11.1
Report Writer Settings

Settings	Action
Report Details	Lets you choose user access rights for the report, and make the report available to selected modules and users. It is similar to the External Report Details window (see “Adding External Reports” on page 142). The only difference is the Query ID field here instead of the Procedure to Run field in the External Report Details window.
Fields	Lets you select the fields you want displayed in the report. The list of fields appearing here depends on the Query ID you selected in Report Details. Some fields are generic, and appear in all lists. These fields relate to header and footer information like page number, date and time, and so on. You can also select the font, color, alignment, and appearance for each field of the report. Click the Calculated Field button to apply preset formulae to the available fields. These calculated fields then appear with a red asterisk (*) in the fields listing. Click the Summary Fields button to select fields that appear with a summary in the report.
Group	Lets you select particular groups according to which the report displays. It is basically a design element to arrange data display. Groups take precedence over sort options.
Record Highlight	Lets you choose a particular field and define conditions under which it appears highlighted in the report display. You can also select a unique format for the highlight.
Sort	Lets you select particular sort orders according to which the report displays.
Format	Lets you choose a theme from predesigned formats or create one yourself.
Define Field Ranges	Lets you define a range for fields that span a particular variable. For example, you can choose to display only those records in the report where the Customer Number is greater than 250000.

Maintaining Your Dashboard

The Dashboard category under the Reports module lists the components available within the system to define your own dashboards. You can choose all or some of the following components:

- Activity Summary
- Forecast Sales
- Sales
- Top/Neglected Object

To edit access permissions to the dashboards you create, right-click and choose Edit External Report.

Note The system does not let you define new components or delete existing ones.

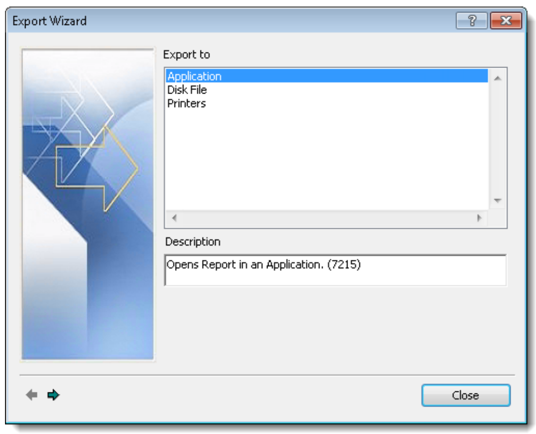
For details on defining a dashboard, see Chapter 12, “Maintaining the Dashboard,” on page 147.

Managing Output Channels

The system lets you 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 and choose Export.
- Click Export on the toolbar from the report display.

Fig. 11.8
Export Wizard



1 Choose the Export option to open the Export Wizard. Use it to export reports to the following output channels:
   - Application
   - Disk File
   - Printers

2 Select one of these output channels and click the forward navigation arrow to select channel types.

3 Click the forward navigation arrow again to select a location where the output file can be saved.

4 Click OK to export the selected report to the chosen output channel.

External applications or channel types that can store reports include:

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

Chapter 12

Maintaining the Dashboard

This section describes working with the dashboard module of the QAD Customer Relationship Management (QAD CRM) application. It discusses the following topics:

Overview 148
Explains what the Dashboard module is used for.

Using the Dashboard 148
Explains how to use the default Dashboard.

Defining New Dashboards 149
Explains how to define new dashboards and add dashboard components.

Overview

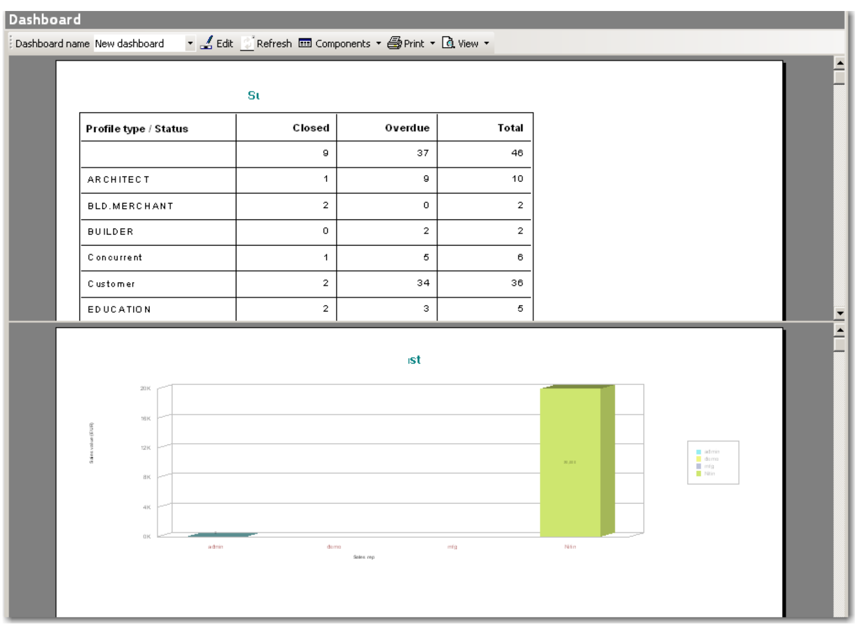
The Dashboard module of the QAD Customer Relationship Management (CRM) system provides an overall view of the progress in various modules such as sales, opportunities, profiles, and activities.

Using the Dashboard

Click Dashboard from the main menu to open the Dashboard screen. The default dashboard displays. The Dashboard screen can have a maximum of four separate views or components:

- Activity Summary: Displays closed and overdue activities in table format, according to the sort criteria specified.
- Forecast Sales: Provides a view of the sales forecast for a specified time span in graph or table format.
- Sales: Displays the figures reflecting actual sales within a specified period.
- Top/Neglected Object: Works with a combination of profiles and opportunities, displaying either the highest revenue earners, or those that have not had any activity for a specified time span. It includes three components—Top Profiles, Top Opportunities, and Neglected Profiles and Opportunities.

Fig. 12.1
Dashboard



Profile type / Status	Closed	Overdue	Total
	9	37	46
ARCHITECT	1	9	10
BLD.MERCHANT	2	0	2
BUILDER	0	2	2
Concurrent	1	5	6
Customer	2	34	36
EDUCATION	2	3	5

The dashboard toolbar includes the following:

- Dashboard Name: Use the drop-down to select the dashboard you want to display.
- Edit: Click this button to change the display and data properties of the current dashboard. You can also add or delete existing dashboards through this option.
- Refresh: Click this button to reload the dashboard views.
- Components: Use the drop-down to select which component to edit.

- Print: Use the drop-down to select which component view to print. You can only print one view at a time. All the displayed views cannot be printed together.
- View: Use the drop-down to select which view to display. Selecting All divides the screen to display all the selected component views together.

Defining New Dashboards

Click Edit on the dashboard toolbar to open the Dashboard Details screen. The Dashboard Details screen has two parts—the top half is a browser displaying the list of existing dashboards, while the bottom half opens the selected dashboard in edit mode.

To define a new dashboard, right-click in the browser area and choose Add.

Details

Use the Dashboard Header area to record basic details.

Dashboard Name. Enter a name for the new dashboard you are defining.

Dashboard ID. This is a system-generated, unique code that appears when you save the new dashboard details.

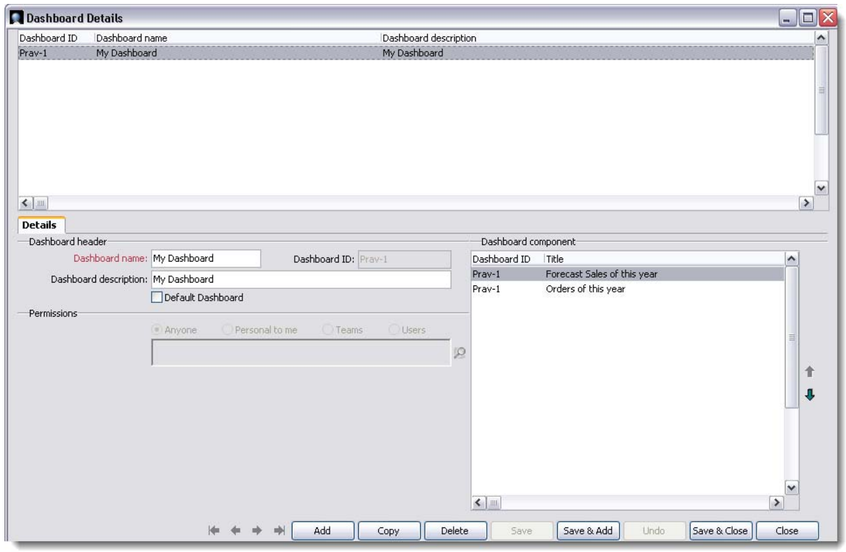
Dashboard Description. Enter a description for the dashboard you are defining.

Default Dashboard. Select this check box if you want the new dashboard to display as the default.

Dashboard Permissions. Select the appropriate radio buttons to indicate who will have permission to view the new dashboard.

Dashboard Component. Right-click to add a new component from the four options available—Activity Summary, Forecast Sales, Sales, and Top/Neglected Object. You can also copy a component from an existing dashboard. Use the up and down arrow keys to specify the placement of each component on the screen.

Fig. 12.2
Dashboard Details



Adding Dashboard Components

When you add a new dashboard component using the Dashboard Details screen, or edit an existing one using the Components button on the toolbar, the Dashboard Component screen displays.

Record the component description in the Description fields.

Title. Enter a title for the component you are adding. This title displays as the dashboard heading for the selected component.

Component ID. Use the drop-down to select a component ID.

Component Type. Select the appropriate component type—Graph or Table.

Note The Activity Summary component can display only in table format. The Graph tab does not display for that option.

Graph

Break by. Select a parameter that the system can use to sort data while creating a graph from the selected statistics, and define the sort order.

Graph type. Use the drop-down to select the type of graph display.

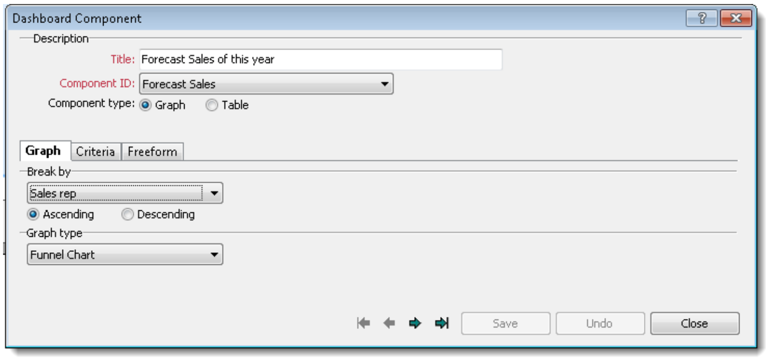
Criteria

Use this tab to select the criteria based on which the system displays data on the dashboard. The fields vary depending on the component you choose.

Freeform

Define fields and conditions on the basis of which the system can sort data for display. You can give a maximum of five sort conditions.

Fig. 12.3
Dashboard Component



Chapter 13

Working with Scripts

This section describes how to define and use scripts. It discusses the following topics:

Overview 154
Explains what scripts are and how they are used with details on the usual sequence of script-related events.

Maintaining Scripts 154
Explains how to create scripts, create sections and subsections, and add questions to scripts.

Attaching Scripts to Targets 159
Describes how to attach scripts to targets in the Scripts module.

Processing Scripts 160
Explains how to process scripts with the Scripts module, from the Scripts tab, or from the Activities screen.

Analyzing Script Responses 161
Explains how to use Script Analysis.

Overview

Scripts are a predefined series of questions designed to help streamline interaction with customers and prospects. Scripts are used by various departments within an organization such as telemarketing and customer services. For example, marketing personnel can design telemarketing scripts in order to guide telemarketers' questions and record responses, as well as to conduct customer surveys.

A script is developed first in a prototype phase called a test; this lets you model and practice the script before converting it into the final, live version you will use to collect data from your respondents.

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

1 Maintaining your scripts. This involves tasks such as creating or editing sections, subsections, questions and subquestions. For details, see "Maintaining Scripts" on page 154.

2 Attaching scripts to targets (profile/target combinations). For details, see "Attaching Scripts to Targets" on page 159.

3 Processing scripts. This involves contacting the profiles/contacts that are your targets to capture their responses to your script. For details, see "Processing Scripts" on page 160.

4 Analyzing script responses. This involves using search criteria to focus on the targets that responded to your scripts in a way that facilitates your marketing efforts. For details, see "Analyzing Script Responses" on page 161.

Maintaining Scripts

Use the Scripts module to maintain scripts in your system. Maintaining scripts involves the following tasks:

- Creating, editing, or deleting a script
- Maintaining script sections and subsections
- Defining script questions and subquestions, and defining possible answers

Creating Scripts

Use the Script Details dialog box to create a script.

1 From the application menu, choose Scripts. The List pane displays scripts currently defined in the system as a hierarchical tree.

2 With the root Available Scripts item selected, right-click the Scripts tree view and choose New Script from the menu.

   Note This menu also contains additional options for working with scripts. If an attempt is made to delete a script, an alert message displays.

Fig. 13.1
Script Details

Script Code. Enter a unique code to identify the script.

Description. Enter a description of the script.

Date Entered. Enter the date on which the script was added to the system.

Status. Select a status for the script.

Test. Select this option to indicate the script is not yet ready for a live environment.

Note It is recommended that you do not use a test script for live data collection: you will lose all previously collected answers once you convert a test script to a live script.

Live. Select this option to indicate the script is being used in a live or production environment.

Comments. Enter descriptive comments as required.

Note To target information for existing scripts, click the name of the script in the List pane. The Target browse displays showing target information for the selected script, along with associated contacts and the date on which the script was run last.

Creating Sections and Subsections

When a script is created, it is given a section by default. Sections allow long scripts to be broken into phases, or into a series of related questions within a script. Sections can, in turn, have subsections for increased granularity. A script can have as many sections or subsections as required. Sections and subsections are specific to a script and cannot be shared among scripts.

Use the Section Details or Subsection Details dialog box to create a section or subsection. The dialog box for sections and subsections is identical.

1 Do either of the following:

   a To create a section, right-click the script and choose New Section from the right-click menu.

   b To create a subsection, right-click a section and choose New Subsection from the right-click menu.

   Note This menu also contains additional options for working with sections and subsections, such as Edit and Delete.

2 The Details dialog box displays.

Fig. 13.2
Section/Subsection Details

3 Enter a value in the Order field to determine the order of the section or subsection within the script.

In order to leave room for additional sections, it is recommended values be entered in increments of 10. For example, if creating a section, enter 0 to make this the first section in the script, 10 for the next section, and so on.

4 Enter the title of the section or subsection in the text box.

Adding Questions to Scripts

Questions are the key component of a script. Typically scripts are designed to elicit responses to increase the effectiveness of an organization's campaigns, or the profitability of its products or services. For example, questions in a script might be designed to determine a customer's reaction to changes in an existing product. Responses to questions are often recorded for analysis purposes.

Questions can be added to sections and subsections. The questions included within a section or subsection typically are closely related. Questions can also consist of one or more subquestions.

You also can define possible answers that can be given in response to questions.

1 Do either of the following:

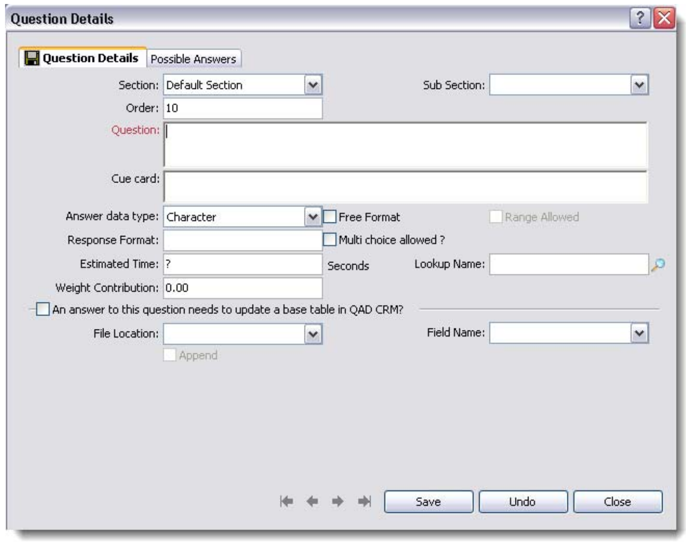
   a To create questions for a section, right-click the section and choose New Question from the right-click menu.

   b To create questions for a subsection, right-click a subsection and choose New Question from the right-click menu.

   Note This menu also contains additional options for working with questions, such as Edit and Delete.

2 The Question Details dialog box displays. This dialog box is identical whether you are entering a question or a subquestion.

Fig. 13.3
Question Details



Question Details

Use the Question Details tab to provide the question text and format.

Section. Enter the name of the section that should contain this question.

Subsection. Enter the name of the subsection that should contain this question.

Order. Enter a value in the Order field to represent the order of the question within the section or subsection.

In order to leave room for additional questions, it is recommended values be entered in increments of 10. For example, enter 10 to make this the first question in the section or subsection, 20 for the next question, and so on.

Question. Enter the text of the question. This field is required.

Cue card. Enter the identifier for the cue card to use when the script is run.

A cue card is a visual prompt that the system displays during script processing when the focus is on a particular question. Cue cards are designed to assist users to provide appropriate responses.

Answer Data Type. Enter the data type for the question. For Decimal and Date options the Range Allowed check box is available.

Note You also can provide information about appropriate responses for each answer data type by using the Possible Answers tab. For details, see “Possible Answers” on page 158.

Free Format. If the data type of the question is Character, select this option to indicate that the question can be free format.

Range Allowed. If the data type of the question is Decimal or Date, select this option to indicate that the question can include a range of values.

Response Format. Not currently used.

Multi Choice Allowed? If the data type of the question is Character, select this option to indicate that multiple choice is allowed for the question.

Estimated Time. Not currently used.

Lookup Name. Enter a program name. Use this field to identify a program to execute when running the script.

Weight Contribution. Not currently used.

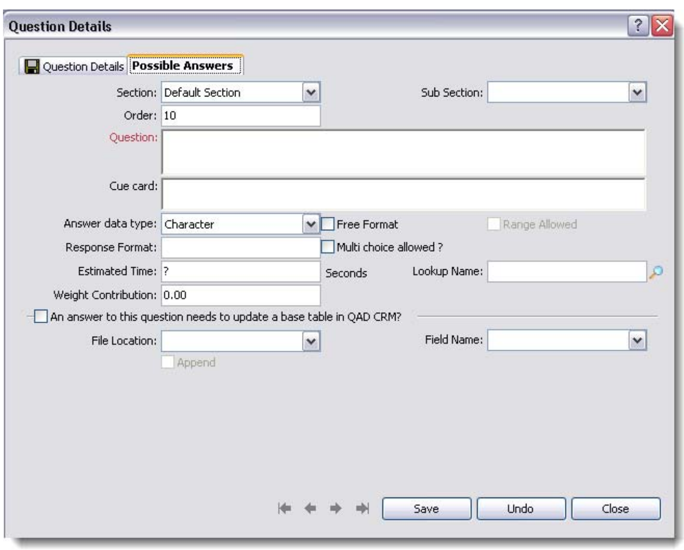
Update Base Table. Select this option if an answer to this question needs to update a base table in QAD CRM. You also can provide the file location and field name, and whether the update should be appended.

Possible Answers

Use the Possible Answers tab to provide text and format for possible answers to questions. Each different answer data type—character, decimal, date, logical, and radio button—has different response types.

Note After completing the fields on the Question Details tab, you must save your changes before clicking the Possible Answers tab.

Fig. 13.4
Possible Answers Tab



For the selected answer type for your question, enter the following:

Table 13.1
Answer Data Type Fields

Answer Data Type	Field	Description
Character	Serial No.	Enter the order in which the script branches.
	Weightage Contribution	Enter the weight this response contributes to the script as a whole.
	Answer	Enter a possible customer response.
Decimal	Serial No.	See above.

Answer Data Type	Field	Description
	Weightage Contribution	See above.
	Field Operator	Enter an operator; for example, equals, not equal to, and so on.
Date	Serial No.	See above.
	Weightage Contribution	See above.
	Field Operator	Enter an operator; for example, today, yesterday, and so on.
Logical	Enter Label	Enter a label for the logical response type; for example, Yes or No.
	Branching or Weightage Information	Enter the question to branch to depending on the logical response.
Radio buttons	Radio Button Labels	Enter a label.
	Weightage	See above.
	Next Question to Branch To	Enter the question to branch to depending on the radio button response.

Attaching Scripts to Targets

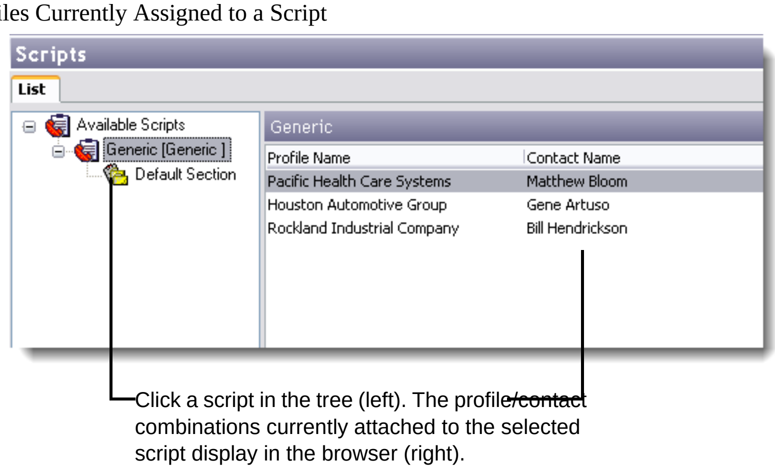
Before a script can be processed it must be attached to a target, which is a profile/contact combination.

Note Scripts can be attached to profiles and contacts from the Scripts module. Scripts can also be attached to targets from the Addresses module, and added as an activity to the Activities screen.

1 From the application menu choose Scripts. The Scripts tree view displays the scripts currently defined in the system.

2 Select a script. The target browser to the right displays any target profiles and contacts currently attached to the selected script.

Fig. 13.5
Profiles Currently Assigned to a Script



3 Right-click the browser and choose Add Target.

Note This menu also contains additional options for working with scripts, such as Delete Target, Process, Script Analysis, and so on.

4 The Find Profile/Contact browse displays. Select a profile from the search results and click OK. The selected profile and contact record is added to the list of attached profiles/contacts.

Processing Scripts

After attaching the script to the profile/contact combination, the script can be processed. Processing a script entails using the script to guide your questions and capturing your target's responses.

Important It is recommended that you do not use a test script for live data collection: you will lose all response data once you convert a test script to a live script.

Scripts can be processed from the list of profiles/contacts in the Scripts module, from the Scripts tab in the All Profiles module, or from the Activities screen.

1 Do one of the following:

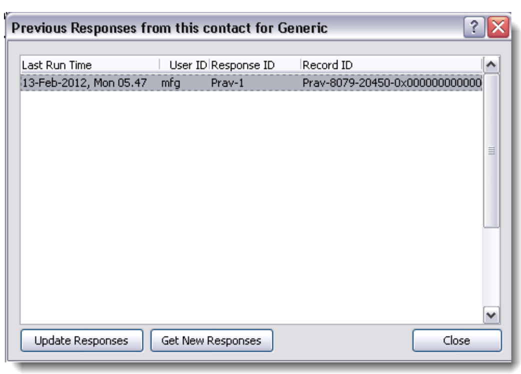
   a To process a script from the Scripts module: From the application menu choose Scripts. Select a script from the browser on the left. Right-click the browser on the right and choose Process.

   b To process a script from the Profile Details screen: Click the Scripts tab. Right-click the browser and choose Process.

   c To process a script from the Activities screen, right-click the activity and choose Process.

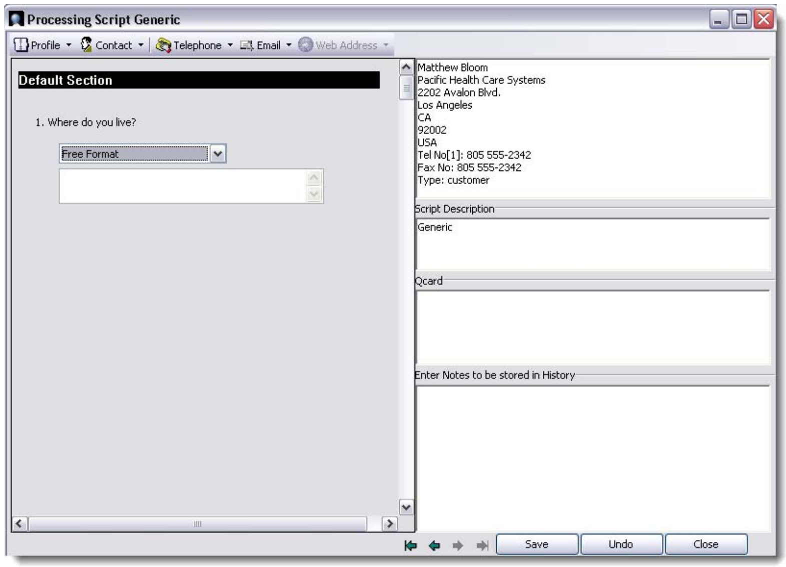
2 If previous responses exist, the Previous Responses box displays, showing the previous responses for the selected script and profile/contact. Otherwise this box does not display.

Fig. 13.6
Previous Responses



3 To update an existing response, select the response record and click Update Responses. To obtain fresh responses, click Get New Responses. The Processing Script dialog box displays.

Fig. 13.7
Processing Script



4 Call the contact and follow the script to guide the interview and capture their responses.

5 Enter any information required in the Enter Notes to be stored in Transaction History. This information is available from the Activities tab of the profile.

Analyzing Script Responses

Analyzing script responses lets you identify the target profiles and contacts that have responded favorably to your script by providing preferred responses to script questions.

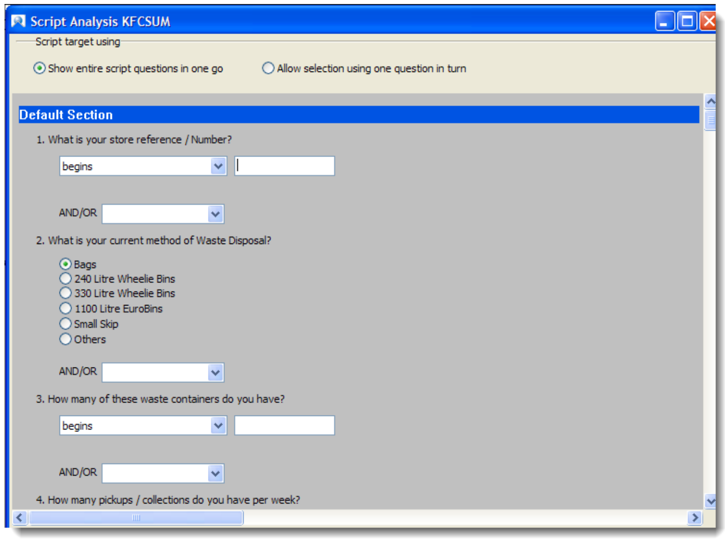
For example, suppose a script has been used to elicit responses from 500 target profiles. Filtering through the response data manually would be time-consuming. However, you can use the logical operators in the Script Analysis box to step through the script questions to quickly reduce the number of records in the results in order to identify your best targets.

After identifying these target you can initiate the next stage of your marketing strategy; for example you might want to include these target profiles in a marketing campaign.

1 Select a script in the tree view. The target profiles/contacts for the script display.

2 Right-click the target list and choose Script Analysis. (Alternatively, click Script Analysis in the toolbar.) The Script Analysis box displays.

Fig. 13.8
Script Analysis

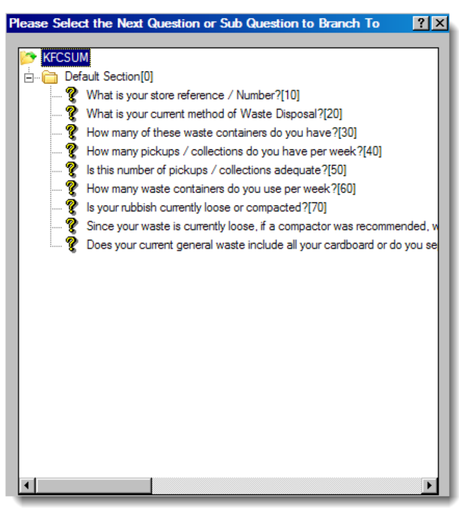


Note You can either display all script questions at once or step through the questions one at a time. This procedure shows how to analyze a script using one question at a time.

3 If it is not selected already, select the Allow selection using one question in turn option. The question icon displays.

4 Click the question icon. The Next Question box displays.

Fig. 13.9
Next Question



5 Select the question in the script you want to use and click OK.

For example, you might choose the first question in the script and work through the questions in sequence in order to gradually reduce the amount of response data. Alternatively, you can branch to any question you want at any time in the script analysis process depending on your analysis requirements.

6 The selected question displays in the Script Analysis box.

7 Select a response and provide a possible response value.

   Note The type of responses and acceptable response values depends upon the answer data type defined for that question. For details on answer data types, see “Possible Answers” on page 158.

8 To use only one filter criterion, click OK. The Script Analysis browser displays, showing a list of targets that satisfy the script analysis criterion you entered.

9 To add more criteria, exit the browser, and then select a logical operator—that is, AND or OR—from the drop-down list box.

10 Click the question icon to select another script question, then click OK.

You can repeat this process as required with different combinations of scripts questions, using the browser to view the results until you have isolated your target profiles.

From the Script Analysis browser, you can attach a target to an existing campaign or export the list output to a third-party application—a spreadsheet, for example—by right-clicking a profile and choosing the Export command.

Section 3

Marketing Management

This section includes information about the Marketing Management layer.

Maintaining Marketing Campaigns **167**

Maintaining Contact Mailing Preferences **183**

Chapter 14

Maintaining Marketing Campaigns

This section describes how to maintain marketing campaigns. It discusses the following topics:

Overview 168
Discusses how CRM manages campaigns through the Marketing Campaigns module.

Understanding Marketing Campaigns 168
Discusses how marketing is used and the Marketing Campaigns module functions.

Planning Marketing Campaigns 169
Explains how to use the Campaigns screen, add campaign templates, copy campaigns and templates.

Processing Marketing Campaigns 171
Explains how to use Campaign Processing, add campaign stages, and add stage activities.

Managing Media Sources 179
Explains how to use the Media Source screen.

Filtering Campaign Records 180
Explains how to use the Campaign Filter screen.

Overview

The QAD Customer Relationship Management (QAD CRM) system helps you manage campaign details, analyze campaign mediums, and successfully execute planned campaigns through the Marketing Campaigns module.

Understanding Marketing Campaigns

Marketing consists of all activities designed to plan, price, promote, and distribute products or services to target markets. The key task of marketing personnel is to make people aware of your business, products or services, and convince them to buy. This task is accomplished through marketing campaigns.

A marketing campaign is a series of operations pursued to promote a product or service. A successful campaign increases company credibility, sales, and profits.

Campaigns are targeted at specific market segments. A typical marketing campaign aims to promote a certain product or product line, and includes predefined sequential stages.

Fig. 14.1
Marketing Campaign Stages

Vital information for future analysis is also gathered through each of the campaign stages. Once a campaign is completed, the gathered information is analyzed to judge the campaign response, and to make strategic and informed business decisions.

The success of a business also depends on optimal utilization of time, effort, and resources. To assist and streamline campaign management, the system offers the Marketing Campaigns module.

The Marketing Campaigns module lets you:

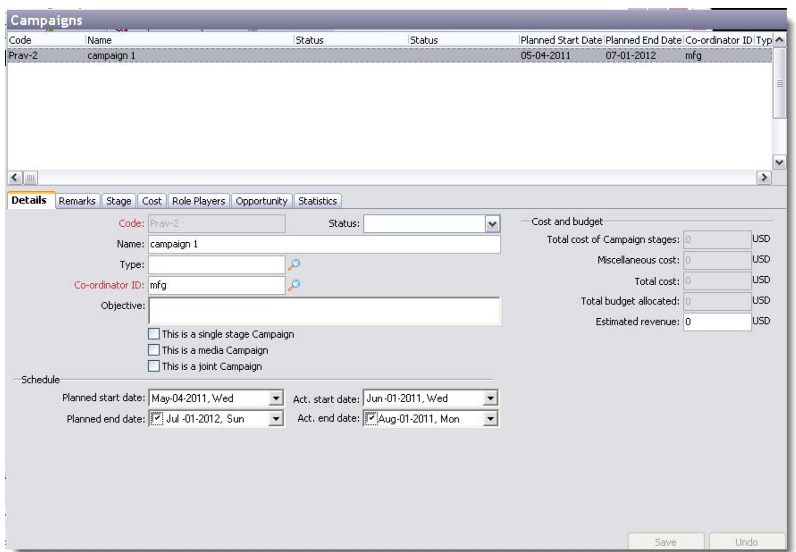
- Design and detail campaigns and their stages.
- Maintain target audience information.
- Calculate and assign costs at each stage.
- Choose the appropriate campaign media.
- Execute campaigns according to planned schedules.

Planning Marketing Campaigns

The Campaigns sub-module lets you view and maintain all existing campaigns and campaign templates, and add new ones. Choose Main Menu|Marketing Management|Marketing Campaigns|Campaigns to open the Campaigns screen.

The Campaigns screen has two parts: The top half is a browser displaying the list of campaigns and campaign templates in the database; the bottom half opens the selected campaign in edit mode.

Fig. 14.2
Campaigns



There are multiple ways to edit a campaign. Select the record and do one of the following:

- Click the Edit button on the toolbar.
- Right-click and choose Edit.
- Choose Edit from the File menu.

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

Details

Use the Details tab to record basic information about a new campaign.

Code. The system assigns a unique code to identify each campaign record in the database. This is a mandatory field.

Name. Enter a name for the campaign.

Type. Select the campaign type from the look-up provided.

Co-ordinator ID. Select the coordinator who will be responsible for executing the campaign. This is a mandatory field.

Objective. Define the objective or purpose for planning a new campaign.

Single Stage, Media, Joint Campaign. Select the appropriate check boxes depending on the kind of campaign planned. If you select the media campaign option, a new tab called Media is added to the Campaigns screen.

Note Single-stage campaigns are a one-step process; for example, sending an address change notification to a selected target audience. The Single Stage Campaign check box is unavailable when you create more than one stage for a campaign.

Status. Select the current status of the campaign from the drop-down list.

Schedule. Enter the planned start and end dates. These can be compared with the actual start and end dates after the campaign is over.

Cost and budget. Enter the campaign costs under different heads here, including total budget allocated, total campaign cost, and the revenue expected out of the entire campaign.

Remarks

Enter additional details like the list of places where the campaign will be held, when is a special event associated with the campaign expected to happen, who will be the attendees for the planned event, and so on.

Stage

The Stage tab lets you perform the same functions as the Campaign Processing sub-module. For more details, see “Processing Marketing Campaigns”.

Cost

You can compute campaign costs, attach an invoice file, and perform a cost analysis for the entire campaign through the Cost Details screen. This tab also lets you choose whether you want to capture cost details for the whole campaign, or create a stage or task-based cost breakdown.

Role Players

You can use this tab to manage the three types of role players that can be associated with a campaign. The available role player types are User, Team, and External, referring to distributors or partners who are participating in the campaign.

The Role Players tab lets you decide the access rights to a campaign. If you want everyone to have access to the campaign details, select the Anyone radio button. However, if you want only the role players associated with the campaign to have access, then select the One of the Following Role Player button.

You can also define access for users and teams through the Allow Access check box in the Internal Role Players window.

Opportunity

Use the Opportunities tab to view and manage opportunities associated with the selected campaign. You can add, edit, copy, or delete opportunities from this tab directly.

Two views at the bottom right corner of this window let you add description and opportunity lines for the selected campaign record.

Statistics

This tab displays the breakdown of targets based on their current stage, showing the anticipated targets, the total targets, the variance, and so on.

Media

The Media tab displays only when the media campaign check box is selected from the Details tab. Use this tab to add campaign media sources for a selected campaign.

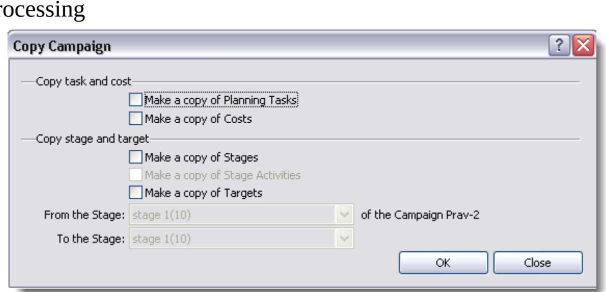
Adding Campaign Templates

You can add campaign templates from the Campaigns screen in the same manner in which you add new campaigns. In this case, right-click in the browser area and choose Add Template. You can later use these templates as a baseline for new campaigns.

Copying Campaigns and Templates

You can base new campaigns on existing campaigns and templates through the Copy option. To copy an existing campaign or template, select the record you want to copy from the Campaigns screen, right-click in the browser area and choose Copy. The Copy Campaign window displays.

Fig. 14.3
Campaign Processing



Select the check boxes representing the things you want to copy from the existing campaign or template. You can copy tasks, cost, stages, stage activities, and targets. Save the record with a new name.

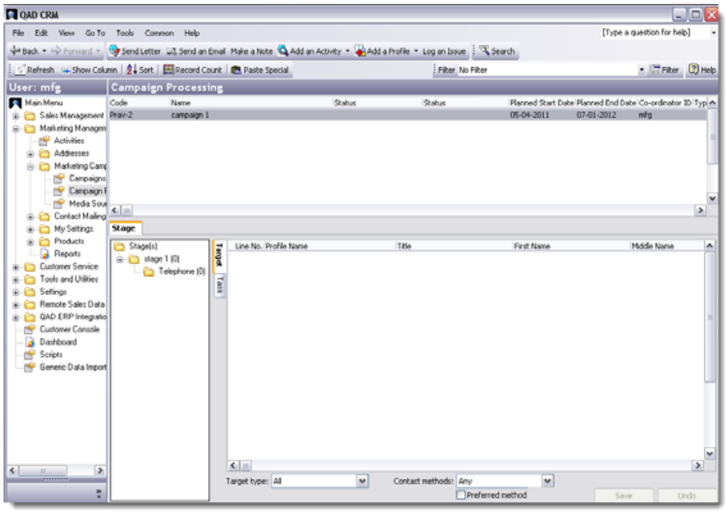
Note Though templates can have associated targets, you cannot copy targets if you are copying a campaign template. To copy targets you must make sure you copy an existing campaign.

Processing Marketing Campaigns

The Campaign Processing sub-module lets you manage the various stages of a campaign. It also lets you add activities, create tasks, and attach targets to each campaign stage. You can use this option to execute tasks against select campaign targets. For example, you can run a telemarketing script for all customers who have joined in the last six months.

The Campaign Processing screen has two parts—the top half is a browser displaying the list of campaigns in the database, while the bottom half opens the stage details of the selected campaign.

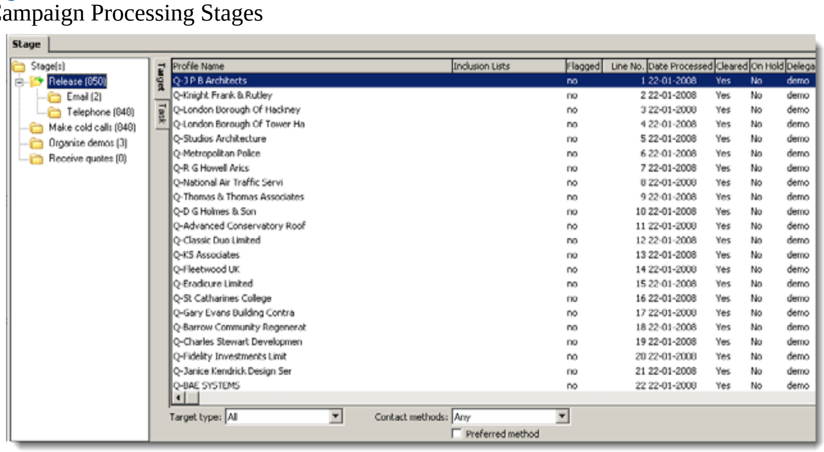
Fig. 14.4
Campaign Processing



The bottom half of the Campaign Processing screen has two areas. The left side displays the stages you have added to a campaign, and the targets available in the database for each stage. The right side lists the targets available and the tasks associated with each stage.

Note The number of targets displayed in the right side depends on the access permissions of the logged user. The number of targets in the tree view on the left may therefore not be identical to the number of targets listed on the right.

Fig. 14.5
Campaign Processing Stages



You can alter the view of the displayed records by selecting appropriate options from the Target type and Contact methods drop-down lists.

Adding Campaign Stages

To add a stage, right-click the Stage folder and choose Add Stage. The Stage Details window displays.

Details

Use the Details tab to record basic information about a campaign stage.

Stage No. The system assigns a number for the new stage automatically. However, you can change it as needed. This is a mandatory field.

Description. Enter a name or description for the new stage. This is a mandatory field.

Start Date, End Date. Enter the start and end dates of the campaign stage, if known.

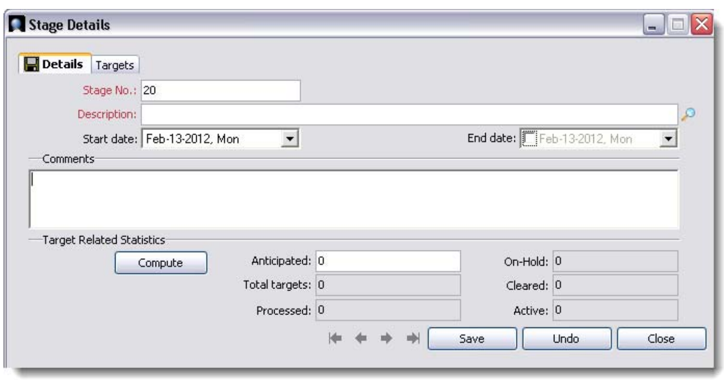
Comments. Record any comments that you may have regarding the campaign stage.

Target Related Statistics. Enter target details here and click the Compute button to let the system calculate target related statistics.

Targets

The Targets tab displays the list of targets associated with the selected stage. You can select the view from the Target Type and Contact Methods drop-down lists.

Fig. 14.6
Stage Details



When you save the information you entered in the Stage Details window, the new stage name displays in the bottom left of the Campaign Processing screen. You can now add activities to this stage.

Adding Stage Activities

To add an activity to a selected stage, right-click and choose Add Stage Activity. The Stage Activity Details window opens.

Details

Subject. Enter a name or description for the new stage. This is a mandatory field.

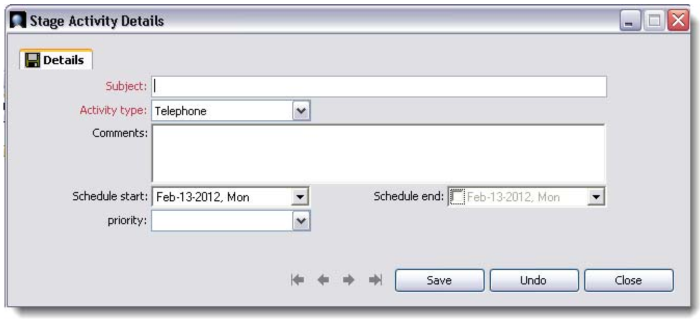
Activity type. Select the activity type from the drop-down list provided. This is a mandatory field.

Comments. Record optional comments regarding the campaign stage.

Schedule start, Schedule end. Enter the start and end dates of the stage activity, if known.

Priority. Select the activity priority from the drop-down list provided.

Fig. 14.7
Stage Activity Details



When you save the information you entered in the Stage Activity Details window, the new activity associated with a stage displays in the bottom left of the Campaign Processing screen.

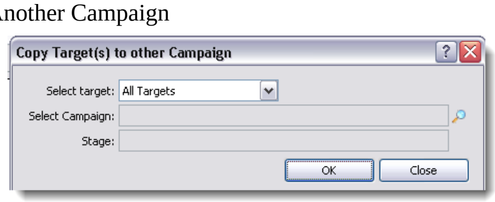
The left part of the Campaign Processing screen lets you add, edit, copy, and delete campaign stages and stage activities. The right part lets you manage campaign targets and tasks. For more details on managing tasks, see "Managing Tasks" on page 67.

You can also perform any of the following functions from the right part of the Campaign Processing screen. These functions are available in the right-click menu.

Copy To Campaigns

You can copy selected targets from the current campaign to another campaign in the database through this option. Use the look-ups provided to select the campaign and stage to which you want to copy the targets.

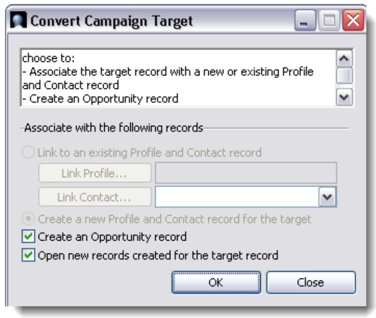
Fig. 14.8
Copy Targets To Another Campaign



Convert Campaign Target

Choose this option to associate a manually created target with an existing profile, contact, or opportunity. You can also create a new profile or contact record for a target from this window.

Fig. 14.9
Convert Campaign Target

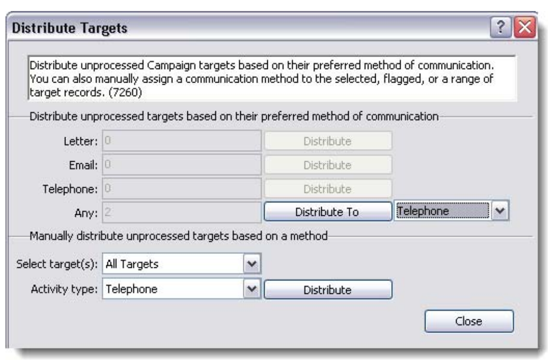


Distribute Targets

Use this option to distribute selected targets according to their preferred method of communication. You can also manually assign a communication method to a selected target.

Distribution of targets works only from the stage level, and not at the activity level. Activity options are enabled in the Distribute Targets window only when they have been selected for the particular campaign.

Fig. 14.10
Distribute Targets

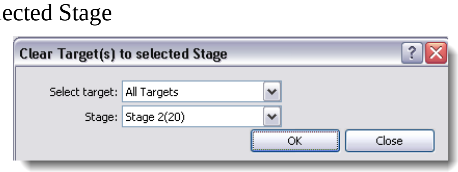


Note Only unprocessed targets can be distributed.

Clear

Use this option to directly promote selected targets to the next logical stage in the campaign. You can also select a stage of your choice from the drop-down list provided.

Fig. 14.11
Clear Targets To Selected Stage

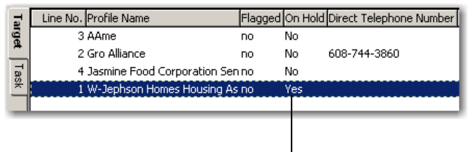


QAD

On Hold

Choose this option to put a hold on selected targets associated with a campaign. When a target is on hold, the On Hold field is set to Yes. The system does not let you process targets that are on hold until you clear them or remove the hold.

Fig. 14.12
Selected Target On Hold



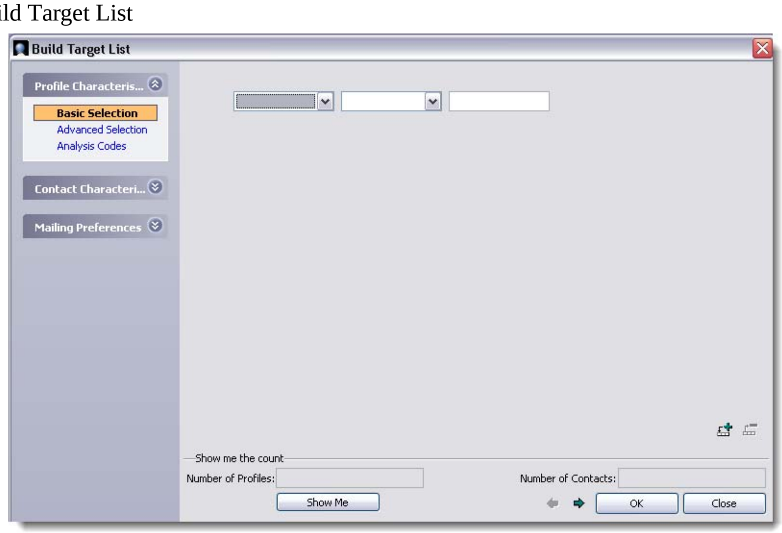
Process

This option lets you process the activities of selected targets from this module directly. For details, see “Processing Activities” on page 63.

Build Target List

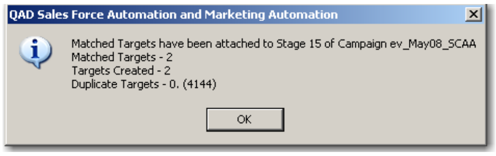
Use this option to create a target list for a campaign from the data available in the system database. The Build Target List screen lets you define selection criteria based on which targets are associated with a campaign or its stages. You can make your selection based on profile and contact characteristics, or according to mailing preferences.

Fig. 14.13
Build Target List



Click the Show Me button to see a count of the profiles and contacts shortlisted as targets based on your criteria. The system displays a confirmation message when the list is created.

Fig. 14.14
Build Target List - Confirmation Message

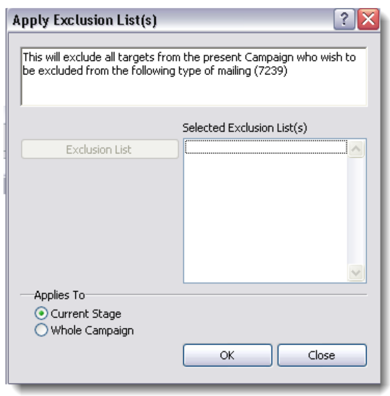


The Build Target List option is available from both parts of the Campaign Processing screen.

Apply Exclusion List

This option lets you exclude targets from the selected campaign from a particular type of mailing. You can apply the exclusion list to the current stage or the entire campaign.

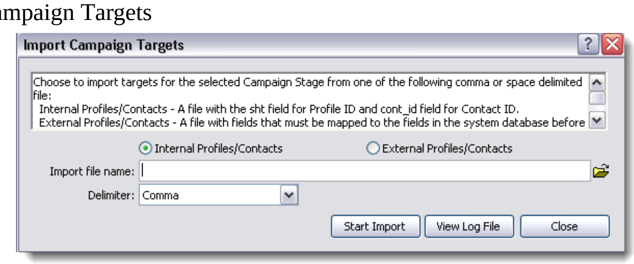
Fig. 14.15
Apply Exclusion List



Import Targets

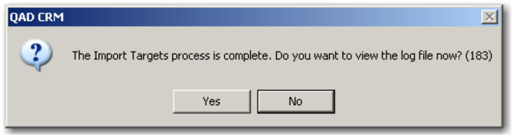
Use this option to import targets for a campaign from an external source or file. The Import Campaign Targets screen lets you select whether you want to import internal profiles and contacts or external ones.

Fig. 14.16
Import Campaign Targets



To import internal profiles and contacts, select the appropriate radio button, attach the required file and click Start Import. This completes the process of importing campaign targets from a file, and the system displays a confirmation message on successful completion.

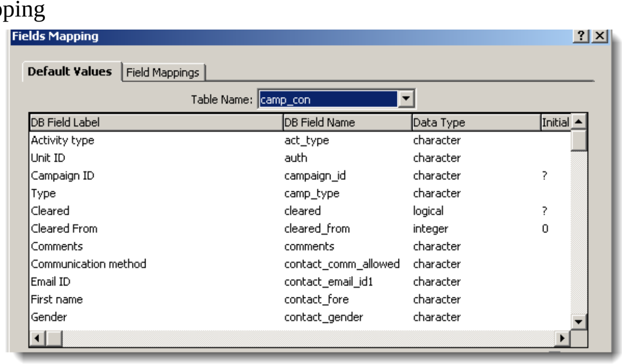
Fig. 14.17
Import Campaign Targets - Confirmation Message



You can choose to view the log file for the import created by the system, or view it later by clicking View Log File from the Import Campaign Targets screen.

To import external profiles and contacts, select the appropriate radio button. The Import Campaign Targets screen refreshes to display the Fields Mapping button. Click this button to display the Fields Mapping window where you can map field names and labels to ensure that the information from the external file is captured accurately by the system. Click Start Import to complete the data transfer and target list creation.

Fig. 14.18
Fields Mapping

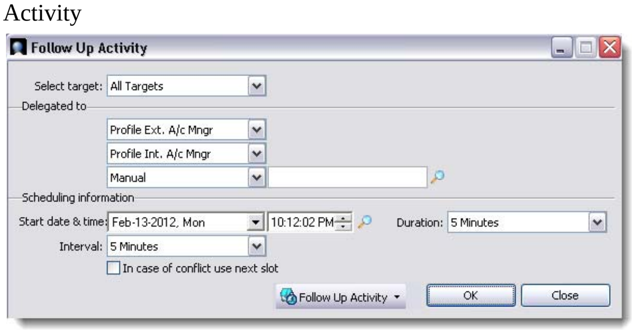


The Import Targets option is available from both parts of the Campaign Processing screen.

Follow-Up Activity

Choose this option to display the Follow-Up Activity screen where you can schedule follow-up activities for selected targets. You can also delegate targets to alternate account managers from here.

Fig. 14.19
Follow-Up Activity



Managing Media Sources

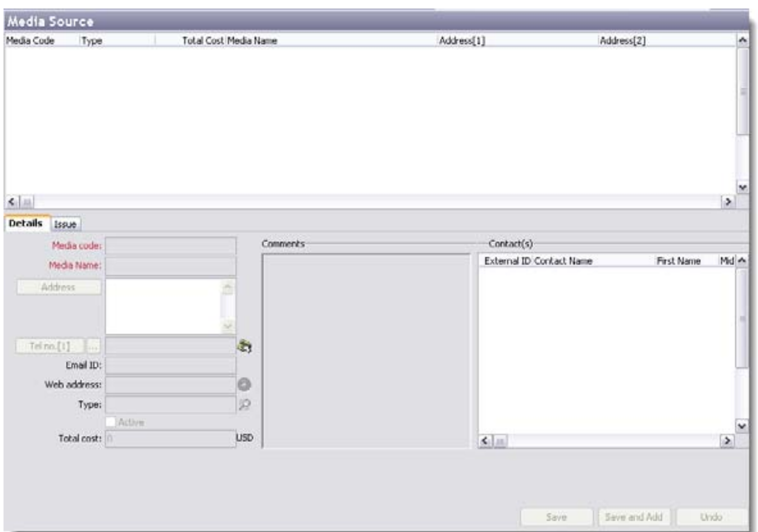
The Media Source sub-module helps maintain details about the chosen media source for a campaign. The media source is the medium through which a campaign is carried out, such as advertisements, television commercials, or newspaper articles.

Since these media typically cost a significant amount, expenses related to them should be included in the cost of campaigns. The Media Source sub-module helps you compute these costs and manage them through the various stages of a campaign.

Choose Main Menu|Marketing Management|Marketing Campaigns|Media Source to open the Media Source screen.

The Media Source screen has two parts—the top half is a browser displaying the list of media sources attached to existing campaigns in the database, while the bottom half opens the source details for the selected campaign in edit mode.

Fig. 14.20
Media Source



The Media Source screen lets you add, edit, copy, and delete source details for the selected campaign record.

Details

Use the Details tab to record basic contact information about a new media source for a campaign.

Media code. Enter a unique code for the new media source. This is a mandatory field.

Media Name. Enter the name of the new media source. This is a mandatory field.

Address and other details. Enter the address, telephone number, mail ID and web address of the new media source.

Type. Select the media type from the look-up provided.

Total cost. This field is automatically populated by the system from the total cost entered in the Campaign sub-module.

Comments. Record comments regarding the media source.

Contacts. Enter contact details related to the new media source here by right-clicking and choosing Add. This displays the Contact Details screen.

Issue

Use the Issue tab to record details regarding the media source.

Year. Select or enter the year of the media campaign.

Issue no. Enter the issue number of the media campaign. This is a mandatory field.

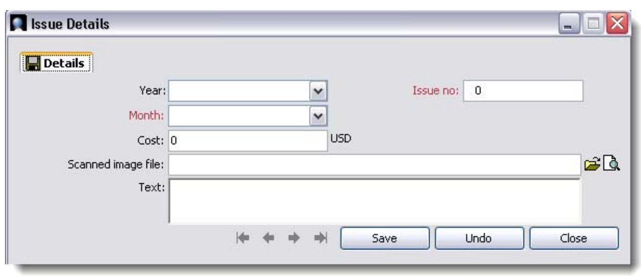
Month. Select the month in which the media campaign will take place. This is a mandatory field.

Cost. Enter the cost of the media source being used for the campaign.

Scanned image file. Attach a scanned image file of the media campaign, if available.

Text. Enter freeform text related to the media campaign here. This is typically used for magazine and newspaper campaigns.

Fig. 14.21
Issue Details

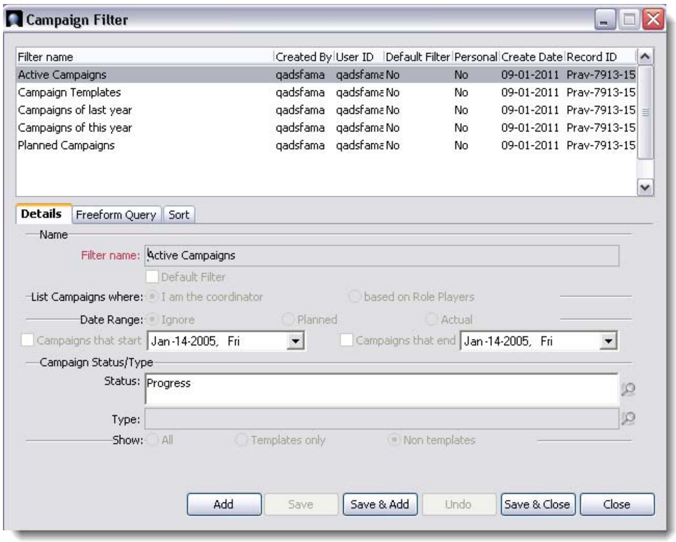


Filtering Campaign Records

As in the case of most data based screens, after sustained use, the system contains an extensive database of campaign records. In such conditions, the filtering feature of the system helps you manage these records in the best manner by letting you create filters according to your requirement.

The Campaign Filter screen lets you define filters for viewing campaign records. For more details on using filters, see “Filtering Profile Records” on page 107.

Fig. 14.22
Campaign Filter



You can use the Campaign Filter screen from both Campaigns and Campaign Processing sub-modules.

Chapter 15

Maintaining Contact Mailing Preferences

This section describes how to maintain contact mailing preferences and discusses the following topics:

Overview 184
Outlines why different types of contact lists are maintained.

Contact Mailing Preferences Workflow 184
Describes the sequence of tasks for maintaining contact mailing preferences.

Defining an Inclusion List 184
Explains how to use the Inclusion Details screen.

Defining an Exclusion List 186
Explains how to use the Exclusion Details screen.

Building a Target List Using Search Criteria 187
Explains how to use the Build Target List option.

Overview

Maintaining contact mailing preferences involves specifying inclusion lists and exclusion lists. These lists are associated with profiles and contacts that constitute your target audience for a marketing campaign, or for a stage in a marketing campaign.

Inclusion lists identify which items of literature to deliver to targets (profiles and contacts) on a regular basis. Exclusion lists specify which items of literature to withhold from identified profiles and contacts.

Typically managing a marketing campaign involves maintaining both inclusion lists and exclusion lists. Use the features in the Contact Mailing Preferences folder to maintain these lists.

Note For details about defining details of a campaign, see Chapter 14, “Maintaining Marketing Campaigns,” on page 167.

Contact Mailing Preferences Workflow

Maintaining contact mailing preferences typically involves completing the following tasks in sequence:

1. Define your inclusion list by specifying the items to literature to send. For each item of literature, you also can specify a default quantity, frequency, and associated activity to serve as a reminder. For details, see “Defining an Inclusion List” on page 184.
2. For each item of literature specified, define your targets. This entails identifying the profile and contact, the number of items to send in the mailing, and validity dates. You can add your targets individually, or by building a target list using search criteria. For details, see “Building a Target List Using Search Criteria” on page 187.
3. For each target, send an e-mail or letter as required. For details on these activities, see Chapter 5, “Working with Activities, Tasks, and E-mails,” on page 55.
4. Define your exclusion list, if appropriate. For details, see “Defining an Exclusion List” on page 186.
5. Define the targets for your exclusion list. You can build your target list manually or by using search criteria, as for inclusion lists. For details, see “Building a Target List Using Search Criteria” on page 187.

Defining an Inclusion List

Use the Inclusion Details screen to maintain an inclusion list. An inclusion list specifies the target records to include for a specific stage of a campaign, or for an entire campaign. You can define the types of literature for an inclusion list, as well as the intended targets for each inclusion.

You also can define an exclusion list; for details, see “Defining an Exclusion List” on page 186.

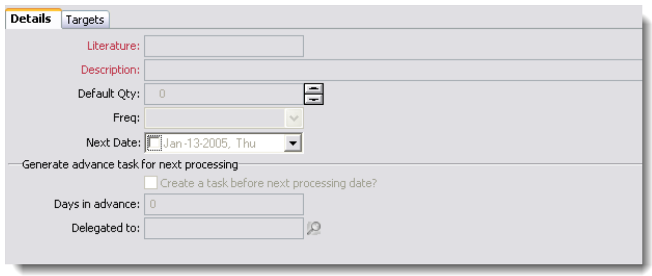
1. Choose Marketing Management|Contact Mailing Preferences|Inclusion List. The Inclusion List browser displays the inclusions currently defined in the system.
2. Right-click the Inclusion List browser and choose Add from the menu.

Note This menu also contains options for deleting and editing existing inclusions.

Details

Use the Details tab to create your inclusion list.

Fig. 15.1
Inclusion Details



Literature. Enter a code to identify the literature to include in the list.

Description. Enter a description of literature to include.

Default Quantity. Enter a number to indicate how many copies of the literature to include.

Frequency. Enter a frequency indicating how often the literature should be sent.

Next Date. Enter the date on which the literature will be next sent.

You can indicate whether you want the system to generate an activity before the next inclusion is processed. The generated activity displays on the Activity calendar of the delegated user.

Create reminder before next processing date. Select this option to enable the following fields.

Days in Advance. Enter the number of days in advance the reminder should display on the Activities calendar.

Delegated To. Enter a system user who is responsible for this activity. You must select a user defined in the system. Typically this user is the user entering the inclusions.

Note The activity defined for this inclusion appears on the Activity calendar for the delegated user.

Targets

Use the Add Target to Inclusion List dialog box to add targets for your inclusion list. Targets are profiles and/or contacts that are identified as the intended audience for your inclusions.

Note To display this dialog box, right-click the Targets browser and choose Add from the right-click menu.

Fig. 15.2
Add Target to Inclusion List

Select a profile and/or contact to add to the inclusion list. After selecting a profile, enter a date on which this target's inclusion on this list should expire.

You also can build your target list by using search criteria. For details, see "Building a Target List Using Search Criteria" on page 187.

Note After creating a target for your inclusion list, right-click the target and choose Send Mail or Send Letter to send the target your inclusion. An activity is entered as a reminder on the Activity calendar. For details, see Chapter 5, "Working with Activities, Tasks, and E-mails," on page 55.

Defining an Exclusion List

Use the Exclusion Details screen to maintain an exclusion list. An exclusion list specifies the target records to exclude for a specific stage of a campaign, or for an entire campaign.

You also can define an inclusion list; for details see "Defining an Inclusion List" on page 184.

1 Choose Marketing Management|Contact Mailing Preferences|Exclusion List. The Exclusion List browser displays the exclusions currently defined in the system.

2 Right-click the Exclusion List browser and choose Add from the menu.

   Note This menu also contains options for deleting and editing existing exclusions.

Details

Use the Details tab to define your exclusion list.

Fig. 15.3
Exclusion Details

Literature. Enter a code to identify the literature to exclude from the list.

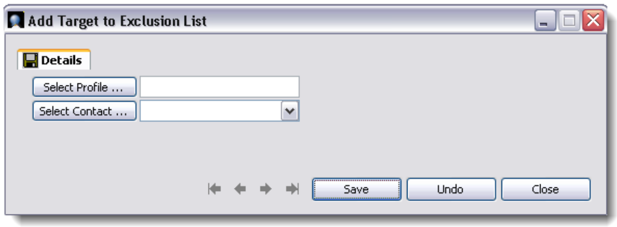
Description. Enter a description of literature to exclude.

Targets

Use the Add Target to Exclusion List dialog box to add a profile and/or contact to the exclusion list.

Note To display this dialog box, right-click the Targets browser and choose Add from the right-click menu.

Fig. 15.4
Add Target to Exclusion List



Select a profile and/or contact to add to the exclusion list.

You also can create a target list using search criteria. For details, see “Building a Target List Using Search Criteria” on page 187.

Building a Target List Using Search Criteria

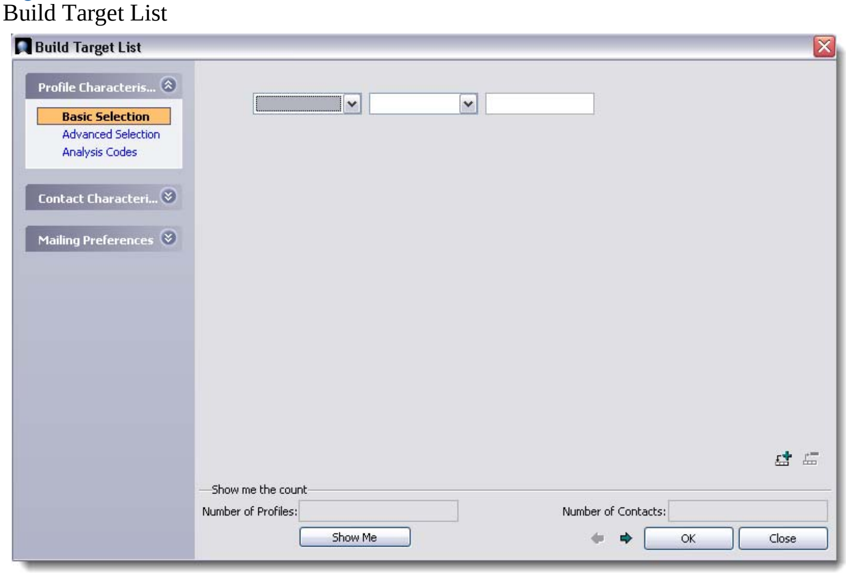
Using the Build Target List option on the right-click menu, you can define search conditions, and then automatically search either the profiles or contacts that are defined in your system to build a target list for either an inclusion or exclusion list. You can then modify the target list as required.

Note You also can use the Build Target List dialog box to import your list of targets from one inclusion list (or exclusion list) to another list of the same type.

To display the Build Target List dialog, right-click the Targets browser and choose Build Target List.

Note The right-click menu also provides other options for targets, such as sending e-mails or letters, or viewing an associated profile. You also can edit targets—for example, to modify the number of literature items to be sent to a target.

Fig. 15.5
Build Target List



QAD

Profile Characteristics. Choose an option to define search characteristics for profiles defined in your system.

Basic Selection. Select a field on the profile and then select an operator. Specify a value.

Advanced Selection. Define your search criteria as required using field names, conditions, and values. If required, enter parentheses using the drop-down listbox to specify the order in which the search criteria conditions will be evaluated. You can append, delete, and update search criteria.

You also can enter Progress 4GL statements into the text field. If using this method, click the Check Syntax button to verify that your statements are correct.

Analysis Codes. Define your search criteria using analysis groups or codes. You can search for profiles that use any or all of the groups you specify.

Contact Characteristics. Select a characteristic to define search criteria for contacts defined in your system. Contact Characteristics has an additional option to the ones described above.

Communication Channels. Select a communication channel. If required, indicate if one of the channels is the preferred method of communication.

Mailing Preferences. Using the arrows, move inclusion lists or exclusion lists from the Available listbox into the Selected listbox. Click OK to import the targets defined for those inclusions or exclusions into the list selected in the listbox.

Show Me. Displays the total number of profile and contact records that comply with the specified selection and filtering criteria. Use the displayed values to either narrow or expand your selected criteria to target the identified market segment more efficiently.

After defining your criteria, click OK to build your target list. The Target browser is populated with the search results.

Section 4

Customer Service

This section introduces customer service and its management.

Managing Customer Service Issues **191**

Managing Service Contracts and Quotes **199**

Working with the Installed Base **205**

Managing Service Queues **211**

Maintaining CSRs **213**

Defining Customer Service Settings **217**

Chapter 16

Managing Customer Service Issues

A fundamental concern in service is the management of information flow between end users and your internal service operations. This means managing incoming service issues. Service issues record end-user interaction and maintain visibility over open problems and support needs. This section introduces service issues and their management.

Overview 192
Describes the uses of the Customer Service module and the prerequisites for using it.

Maintaining Service Issue Status 192
Explains how to use the Issue Status Maintenance screen.

Viewing Customer Service Issues 193
Explains how to use the Issue Management screen.

Defining Issue Details 194
Explains how to use the Issue Details dialog box.

Filtering Issues 198
Explains how to use the Issue Filter dialog box.

Overview

The optional Customer Service module in QAD CRM provides features designed to administer service functions. Typically service and support activity is managed through customer service *issues*. The Issue Management module provides mechanisms for managing customer service issue activity.

A service issue may mean a phone call from a customer, a service visit, a call by a field technician, or any other contact with a customer or potential customer. A customer service issue is contact that generates a service response, even a brief response to a customer's question.

The issue describes the service situation, and *issue management* provides processes and tools for managing the service contact. For example, for each service contact you can record various details such as the product item, product warranty details or associated service contracts, and so on. You also can assign a service issue to a service queue or CSR.

To track the progress of service issue resolution you assign a status to an issue. You close an issue when you have resolved the customer's service problem.

Using filters you can restrict the display of customer service issue records to those that have specific characteristics—status, product ID, product lines, and so on.

Typically a customer service or support department within a large organization may handle issues that originate in different time zones, even other countries. Dates and times can be displayed in the time zone of the contact's location.

Prerequisites

Before the CSRs in your organization can handle service issues, several prerequisite setup tasks must be performed in the Customer Service module:

1. Issue status information must be defined using the Issue Status Maintenance screen. For details, see "Maintaining Service Issue Status" on page 192.
2. Service queues must be defined using the Service Queues module. At least one service queue must be defined if service queues are to be used. For details, see Chapter 19, "Managing Service Queues," on page 211.
3. CSRs must be defined using the CSR Maintenance screen in the CSR Maintenance folder. CSRs are system users; at least one CSR must be defined. For details, see Chapter 20, "Maintaining CSRs," on page 213.

Since issues also capture profile and product information, this base data typically must be defined before using the Issue Management module.

Note You can enable the system to record a service issue if product information is not available. For details, see "Defining Issue Settings" on page 218.

Maintaining Service Issue Status

An issue is managed according to its status, which relates to the issue's position in its life cycle. Is the issue active, pending, an emergency, or closed? Issues are moved from status to status manually by a CSR.

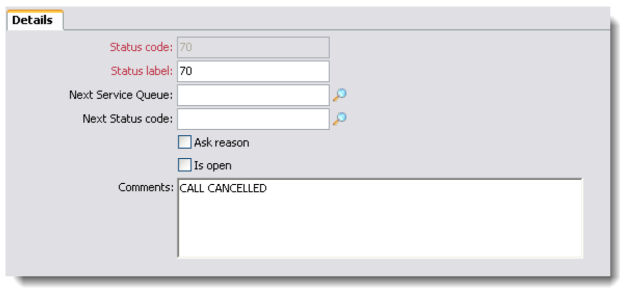
You can set up as many status definitions as you need. It is recommended that you keep the issue life cycle simple.

Issue status codes are user defined and can take any format an organization chooses. Some service organizations prefer numerical status codes or abbreviations. Others use more intuitive names.

For example, when a new issue comes in, its status can be OPEN. Later, when an engineer is assigned to the issue, the status becomes ASSGND. When the problem is resolved, the issue status is CLOSED.

Use the Issue Status Maintenance screen to define issue status settings for service issues.

Fig. 16.1
Issue Status Maintenance - Details Tab



Status Code. Enter a unique name identifying this issue status. Making the name recognizable can help users quickly identify its purpose.

Next Service Queue. Specify the next queue to which the system should route issues with the next status. This field is for reference; you can use it when setting up escalations.

Next Status Code. Specify the next status that normally follows this status in the issue life cycle. The next status specified here provides a default when the status of an issue is modified.

Ask Reason. Select this option to cause the system to display a dialog box that lets a CSR record the reason for the issue status change.

Is Open. Select this option to cause service issues assigned this status code to display as open in the Issue Management module.

Comments. Enter any description required.

Viewing Customer Service Issues

Use the Issue Management screen to view customer service issues recorded in the system. In the My Work task panel you can view:

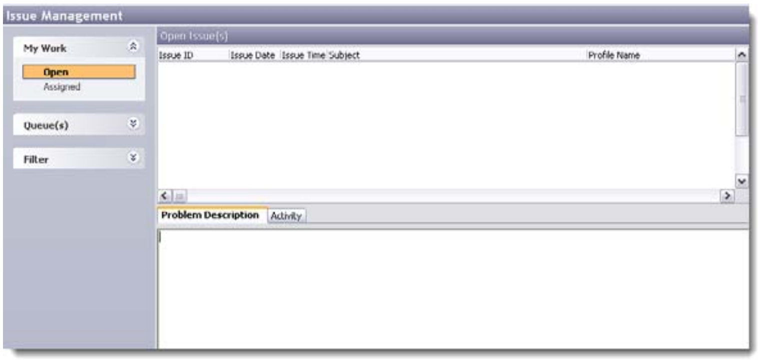
- Issues that are open
- Issues that are assigned
- The queues defined in the system and issues assigned to those queues

Right-click the service issue browser or an issue record to access options for working with customer service issue records; for example, filtering issue records, exporting records to third-party applications, sending issue records to marketing campaigns, and so on.

Issue records that display in bold font indicate issues that have not yet been assigned to a CSR.

A CSR can start working on an issue by right-clicking a service issue record and choosing Edit from the menu.

Fig. 16.2
Issue Management



Use the Problem Description tab to view the text describing the issue for the selected issue. Use the History tab to view planned activities and history for an issue; for details, see "Activity" on page 196.

Defining Issue Details

Use the Issue Details dialog box to define a service issue. This screen controls issues from two primary perspectives:

- Issue information. Where is an issue placed in your support organization (Service Queue)? How is it categorized (Problem Description, Category, Severity)? When should it be updated (Next Status Date and Time)? Where is the issue in relation to the issue life cycle (Status)? Is the issue related to another issue received previously (Relationship)?
- Engineer assignment. Which service engineer should be assigned to work on this issue? Who is best equipped for the particular problem?

Note Service issues also can be created at the profile level. For details, see "Issues" on page 105.

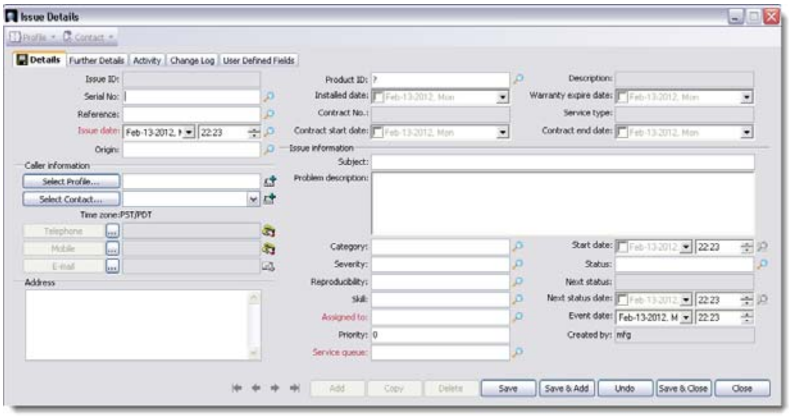
To display the Issue Details screen, right-click the Issues browser in the Issue Management workspace and then choose Add. Alternatively, click the Log a Support Issue button on the application toolbar.

Note You can attach a note to a service issue record by selecting the issue record and then clicking the Make a Note button in the toolbar. Then click the Associate it with button on the Contact Notes tab. Locate the issue record and enter the text of your note into the Contact Notes panel. The note is available in the Notes panel on the Activity tab.

Details

Use the Details tab to define identifying information for an issue.

Fig. 16.3
Issue Details - Details Tab



1 Provide the issue identifying information, as required. The issue ID is generated automatically by the system when the issue is recorded.

Serial No. Enter a serial number. The system finds any associated installed base record and populates the customer, contract, and product information.

Origin. Enter the origin of the issue. For example, Email or Telephone Call.

2 Enter the caller information, as required.

Note When logging a service issue, you can quickly create a profile or contact from the Issue Details screen by clicking the Add button to the right of the Select Profile and Select Contact fields.

3 Enter the issue information, as required.

Subject. Enter a subject. It is recommended that the subject be as meaningful as possible since this will be displayed in the Issue Management workspace in the Subject column.

Problem Description. Enter a short description of the problem with the item. The text entered here displays in the area under the Open Issue(s) browser.

Category. Specify a category for the service issue. For example, you might want to enter a category such as Hardware or Software. Categories help facilitate filtering issue records; for example, you can filter your records to view only those issues relating to a specific type of item.

Severity. Enter a severity for the problem. Severity indicates the end user's perception of how bad the problem is.

Note The system can be configured to send an e-mail to a CSR when an issue with a specified severity is logged in the system. For details, see "Preferences" on page 215.

Reproducibility. Enter an indication of how easily the problem is reproduced. For example, enter Always or Sometimes.

Skill. Enter an indication of the technical difficulty of resolving this service issue. For example, you might rate a problem that can be resolved with little or no technical training as Low.

Assigned To. Enter the CSR you want to assign this service issue to. CSRs are users defined in the system. Issues cannot be saved until assigned a CSR or a service queue.

Priority. Enter a priority rating for the issue.

Service Queue. Enter the service queue to assign to the service issue. Issues cannot be saved until assigned a CSR or a service queue.

Start Date. Enter the date on which the CSR started work on the issue.

Note The date on which the issue was logged by the system is the Issue Date. The Issue Date field is read-only and cannot be modified.

Status. Enter a status for the service issue.

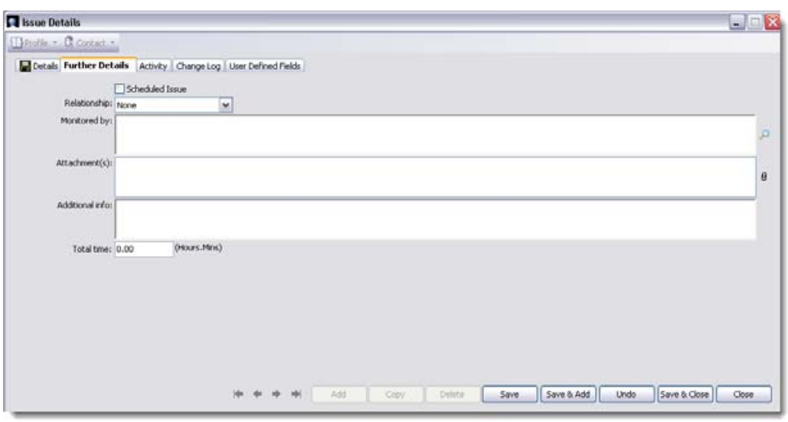
Next Status Date. Enter the date on which the status of the issue will change, if required.

Note The Event Date field displays the date on which activity was generated against an issue—for example, if a note was added. The Event Date field is populated by the system and cannot be modified.

Further Details

Use the Further Details tab to record whether the service issue is related to other issues in the system. You also can record more information about reproducing the problem if required.

Fig. 16.4
Issue Details - Further Details Tab



Scheduled Issue. Select this option to indicate the issue was scheduled.

Relationship. If this issue is related to another service issue in the system, specify the relationship using the drop-down menu. For options indicating a relationship, you also must select the associated issue record.

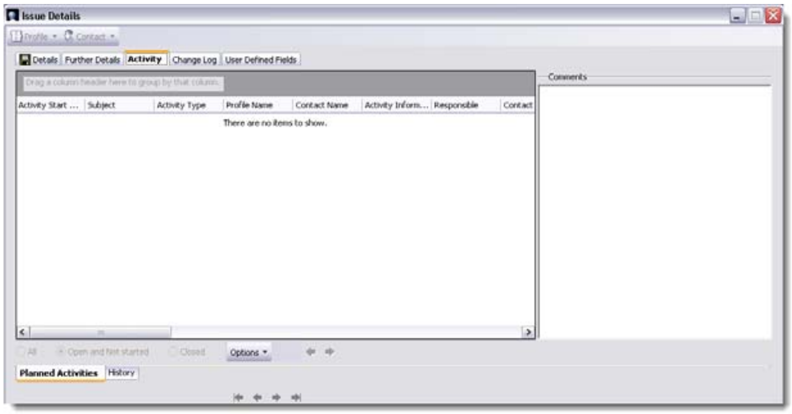
Monitored By. Enter a user who monitored this issue.

You also can specify attachments and the time taken to record the service issue, as required.

Activity

Use the Activity tab to view planned activities or history for the selected service issue; for example, you can view notes that have been added to an issue record.

Fig. 16.5
Issue Details - Activity Tab



1 Specify settings on the Planned Activities tab as required.

All. Select this option to display all activities logged against this issue.

Open and Not Started. Select this option to display open and not started activities logged against this issue.

Closed. Select this option to display all closed activities logged against this issue.

Options. Select an option to control the information displayed.

View Reading Pane. Enable this option to display the reading pane on the right-hand side of the screen. The reading pane displays any notes recorded for a service issue.

Auto Preview. Enable this option to preview any notes associated with an issue in the issue listing.

Options. Choose the option to display the Report Record Selection dialog that lets you either specify a number of records to display or to display all records.

2 Specify settings on the History tab as required.

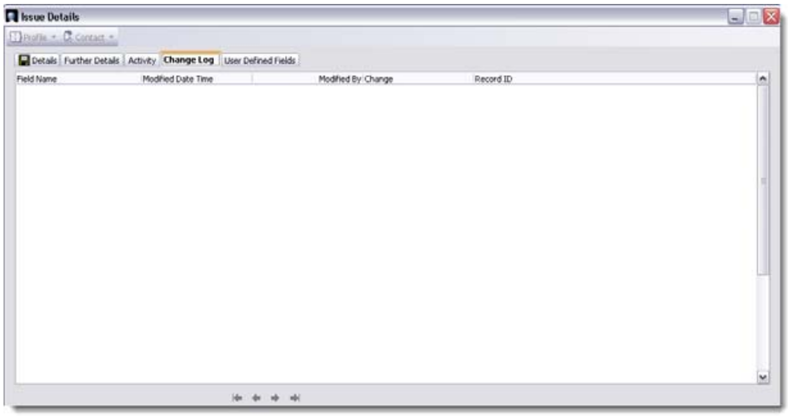
Notes Only. Select this option to only display notes associated with an issue record.

Change Log

Use the Change Log tab to display audit records for selected fields for a service issue record. The change log displays the fields that were modified, modification time and date, user responsible, and the nature of the change. The Change Log tab displays issue log modifications for audited fields that are user-originated as well as system-originated.

Note Issue auditing is a Customer Service module configuration option; for details, see “Defining Issue Settings” on page 218.

Fig. 16.6
Issue Details - Change Log Tab



User Defined Fields

Use the User Defined Fields tab to display issue records using fields defined by your organization. For details on user-defined fields refer to the *Administration Guide: QAD Customer Relationship Management*.

Filtering Issues

Use the Issue Filter dialog box to create filters to use when viewing customer service issue records. When you have many issues, using filters is a useful way to limit the number displayed. Defined filters appear in the task pane to the left of the Issue browser.

You define filters for issue records as you do for other types of system records.

Note After modifying an existing filter, you may have to choose the Refresh command on the right-click menu to refresh the issue records list for the modified filter.

Chapter 17

Managing Service Contracts and Quotes

This section describes how to manage service contract quotes and service contracts. It discusses the following topics:

Overview 200
Explains how service contracts are used to define relationships between customers and users or items.

Maintaining Service Contract Quotes 200
Explains how to use the Service Contract Quotes screen to add, delete, or edit service contract quotes.

Maintaining Service Contracts 203
Describes the specifications of the average service contract and how to maintain them using the Service Contracts module.

Overview

Service contracts define a relationship with the service customer and multiple end users and items. Typically before a contractual agreement is signed, a service contract quote is generated. Service contract quotes specify the cost, terms, and conditions for such things as telephone support, field repairs, and maintenance.

Maintaining Service Contract Quotes

Use the Service Contract Quotes screen to maintain service contract quotes. You can define contract header and bill-to details, as well as information about contract lines, currency and pricing, and so on.

Note If your QAD Customer Relationship Management (QAD CRM) system is integrated with a QAD ERP application, some service contract information that displays on the Further Details tab—price list and credit terms, for example—is shared with the Financials component and is updated automatically in QAD CRM.

1 Choose Customer Service|Service Contract Quotes. The Service Contract Quotes browser displays the quotes currently defined in the system.

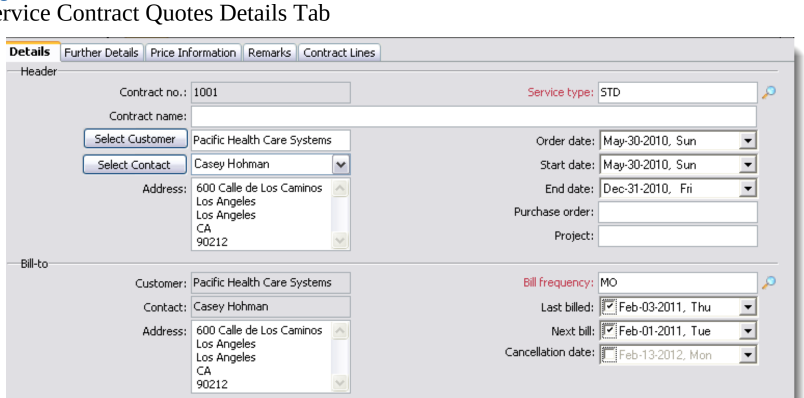
2 Right-click the Service Contract Quotes browser and choose Add from the menu.

   Note This menu also contains options for deleting and editing existing service contract quotes.

Details

Use the Details tab to provide identifying information for a service contract quote.

Fig. 17.1
Service Contract Quotes Details Tab



Contract Number. Enter a unique number to identify the service contract.

Contract Name. Enter a name to identify the service contract.

Select Customer. Enter the customer to whom this service contract applies.

Select Contact. Enter a contact associated with the customer.

Address. If required enter address information for the contact. Typically this field is populated automatically if the customer is already defined in the system.

Service Type. Enter a type of service for this contract. For example, your organization might offer different levels of service—Gold, Silver, or Bronze—representing different levels of support.

Order Date. Enter the date on which the order for this service contract was completed.

Start Date. Enter the date on which the service contract begins.

End Date. Enter the date on which the service contract ends. By default the end date is 12 months from the date on which the contract began.

Purchase Order. Enter the purchase order number of the service contract.

Project. Enter identifying information associated with the quote, as required.

Enter the required bill-to information for the service contract. Customer, Contact, and Address fields inherit the entries specified in the service contract header. Typically the customer and the bill-to information will be the same.

Bill Frequency. Enter a frequency for the customer to be billed.

Last Billed. Enter the date on which the customer was last billed.

Next Bill. Enter the date on which the next bill should be sent to the customer.

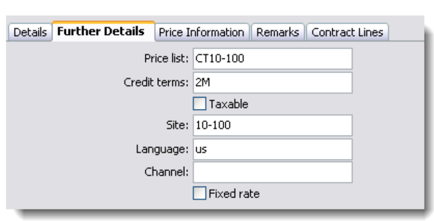
Note If your system is integrated with a QAD ERP application, this information is derived from the QAD ERP application database.

Cancellation Date. If the contract has been cancelled, enter the cancellation date.

Further Details

Use the Further Details tab to enter additional information about the service contract such as price list, credit terms, language, and so on.

Fig. 17.2
Further Details Tab



Price List. Enter the price list to use for this service contract.

Credit Terms. Enter the credit terms that apply to this contract.

Taxable. Select this option to indicate that any contract terms specified for this contract are taxable.

Site. Enter the name of the site responsible for this handling this contract.

Language. Enter the language used by the customer.

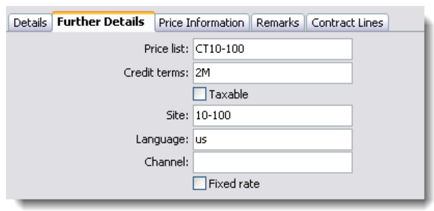
Channel. Enter the distribution channel through which this contract originated.

Fixed Rate. Select this option to indicate that the rate charged for the service contract is fixed.

Price Information

Use the Price Information tab to enter currency and price information for the service contract. You can also define information about discounts and specify trailer charges.

Fig. 17.3
Price Information Tab



Currency. Enter a currency for this service contract. If the currency selected is a foreign (non-base) currency, the exchange rate displays in the Exchange Rate field.

Enter pricing information as required.

Line Total. Displays the total of all contract lines.

Additional Charges. Displays the additional charges on all contract lines.

Discount. Enter a discount as a percentage to be applied to the entire contract in addition to price list discounts and discounts for individual contract lines.

Discount Amount. Indicates the discount as a percentage that will be applied to the entire contract.

Trailer n. For all appropriate trailers, enter a trailer amount for the contract.

Total. Displays the total for the service contract. This figure can be used as the service contract quote for a customer.

Notes

Use the Notes tab to enter additional free-format information as required. Use the Insert button to insert files, date and time, keywords, profiles, or contacts. After entering text, you can click the Spelling and Grammar button to perform a spellcheck of the text.

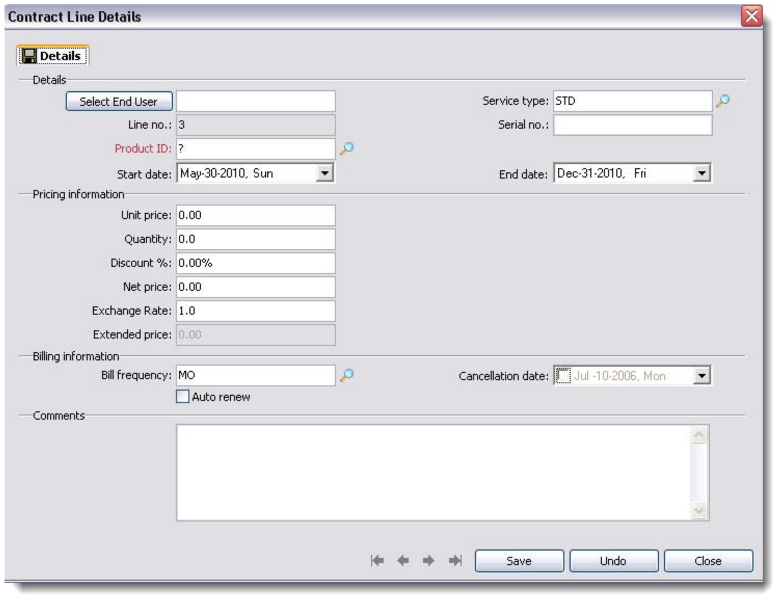
Contract Lines

Use the Contract Lines tab to enter information about contract lines for the contract. You can specify if a contract line is used by an end user.

1 Choose Add Line from the right-click menu to display the Contract Lines Details dialog box. You can enter as many contract lines as required.

   Service type, serial number, start date, and end date in the Details area originate from the contract header, but can be modified if required.

Fig. 17.4
Contract Lines Tab



Select End User. Enter an end user associated with the product for the contract line, if required.

Product ID. Enter the ID of the product for this contract line to be covered by this contract, if required.

2 Enter pricing information for the contract line as required.

Unit Price. Enter the unit price.

Quantity. Enter the number of products included on this contract line.

Discount %. Enter any discount offered on service coverage for this product.

Net Price. Displays the unit price of one month's coverage for this product or fixed additional charge. Net price is derived by subtracting the discount percentage entered from the unit price.

Exchange Rate. Enter the exchange rate.

Extended Price. Displays the extended price. This is calculated by multiplying the net price by the quantity and bill frequency.

3 Enter billing information as required for the contract line item.

Bill Frequency. Enter the billing frequency for this line item.

Auto renew. Select this option to have the billing renew automatically for the contract line.

Maintaining Service Contracts

Service contracts, like warranties, define the rules governing agreements for service with customers. The contract typically specifies:

- The customer and end users receiving coverage

- Items covered
- Levels and limits of coverage
- Total coverage
- Pricing of service
- Duration of contract in months

A service contract is associated with a service contract quote, which defines the cost, terms, and conditions for the contract. A service contract quote is determined before the contractual agreement is signed. For details, see “Maintaining Service Contract Quotes” on page 200.

Use the features in the Customer Service|Service Contracts module to maintain your service contracts.

Note The screens in the Service Contracts module are identical to the screens in the Service Contract Quotes module.

Chapter 18

Working with the Installed Base

This section describes how to work with your installed base. It discusses the following topics:

Overview 206
Explains how the Installed Base relates to QAD CRM.

Maintaining Your Installed Base 206
Explains how to use the Installed Base screen.

Overview

QAD Customer Relationship Management (QAD CRM) enables service organizations to maintain information about the products they sell or service and the individuals who own them. This information is collectively referred to as the installed base (ISB). Comprehensive installed base information is a foundation for effective customer service.

An installed base record matches end users with specific items and can control service policy. Whether you decide to service only the installed base or some other mix of items shapes your service business.

Maintaining Your Installed Base

Installed base data includes records of all items sold to customers who may be involved in future interactions with your organization. Items in the installed base may or may not be under warranty or service contracts.

An installed base record links three essential elements: an item, the customer who purchased it, and an end user. It also maintains details about an item, including serial number, installation date, warranty coverage, and how often preventive maintenance is required. Installed base records also include information about associated activities, customer service issues, opportunities arising from the installation, and so on.

Depending on your permissions you can view or update installed base records as required. You can add activities for installed base records, as well as associate them with opportunities and analysis codes. Opportunities automatically become available in the Opportunities module.

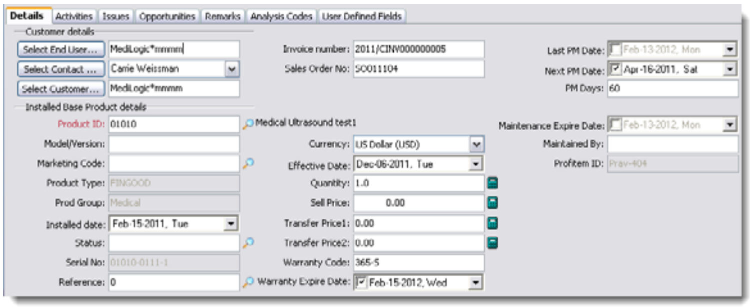
The Installed Base browser displays system records of your installed base. Select a record to view details.

1. From the application menu choose Customer Service|Installed Base. The Installed Base browser displays the installed base records currently defined in the system.
2. Right-click the Installed Base browser and choose Add or Edit from the menu. The Installed Base screen displays.

Details

Use the Details tab to record contact information and product details relating to the installed product.

Fig. 18.1
Installed Base - Details Tab



1 Enter customer details as required.

Select End User. Enter the end user for the product item.

For details on using the Find Profile/Contact browse, see “Searching Profiles and Contacts” on page 94.

Select Contact. Enter the name of a contact from the end user.

Select Customer. Enter the name of the customer if the item was provided to the end user from a customer.

Contract No. Enter the number of the contract associated with the sale.

For details about maintaining contracts, see Chapter 17, “Managing Service Contracts and Quotes,” on page 199.

Invoice Number. Enter the invoice number associated with the sale.

Sales Order No. Enter the sales order number associated with the sale.

Last PM Date. Enter the date on which preventive maintenance (PM) was last conducted.

Next PM Date. Enter the date on which PM will next be conducted.

PM Days. Enter the duration of the preventive maintenance cycle for this item in calendar days.

2 Enter details of the installed base product as required.

Product ID. Enter the ID of the product installed.

Model/Version. Enter a model number or version number of the product.

Marketing Code. Enter a marketing code associated with the installed product. This is a company-standard code used by marketing personnel.

Installed Date. Enter the date on which the product was installed.

Status. Enter a status associated with this product installation.

Serial No. Enter the serial number associated with the installed product.

Reference. Enter a reference number associated with this item.

Note The combination of the serial number and reference number make the installed base record unique.

Currency. Enter the currency in which the sales transaction was conducted.

Effective Date. Enter the date on which the sale was effective.

Quantity. Enter the quantity of the product involved in the sale.

Sell Price. Enter the sale price of the installed product.

Transfer Price. Enter the transfer price for a location.

The transfer price is the price at which divisions of a company transact products with each other. Transfer prices are used when individual entities of a large organization are treated and measured as separately run entities.

For example, if your company manufacturers a product in one location and sends it to another location, the product price may differ between locations.

Transfer Price 2. Enter the transfer price for the second location.

This price will typically include taxes, packaging, and transport expenses.

Warranty Code. Enter the code for the product warranty.

Warranty Expire Code. Enter the date on which the warranty expires for the product.

Maintenance Expire Date. Enter the date on which the maintenance contract expires for the product.

Maintained By. Enter the name of the service person responsible for maintaining the product.

Activities

Use the Activities tab to record information about activities relating to the installed product. For example, you can schedule appointments to be held with profile contacts regarding this installation, such as telephone calls, letters, and e-mails.

To add an activity, right-click the Activities browser. Choose the Add option on the menu and select the type of activity you want to add. You can also select an activity from the Add an Activity drop-down menu on the application toolbar.

For information on adding activities, see “Adding Activities” on page 60.

Issues

Use the Issues tab to manage information about customer service issues for the selected installed base record. To add a customer service issue record, click the Log a Support Issue button on the application toolbar.

For information on managing service issues, see Chapter 16, “Managing Customer Service Issues,” on page 191.

Opportunities

Use the Opportunities tab to record information about opportunities relating to the installed product. Right-click the text field on the Opportunities tab and choose Add to display the Opportunity Details screen.

For details on maintaining opportunities, see “Maintaining Opportunities” on page 76.

Notes

Use the Notes tab to record pertinent freeform information relating to the installed product. You can enter text directly into the field on the Notes tab.

Analysis Codes

Use the Analysis Codes tab to filter installed base records according to their analysis code. Using analysis codes to filter records is useful when the list of installed base records is large.

User Defined Fields

Use the User Defined Fields tab to record information identified as being relevant to your organization’s business requirements.

Only a system administrator can create user-defined frames and fields through Settings|System|User-Defined Fields. For details on user-defined fields, refer to *Administration Guide: QAD Customer Relationship Management*.

Chapter 19

Managing Service Queues

Issue management uses service queues to categorize issues and assign them to service personnel. Each service organization must set up these queues based on business requirements.

Use the Service Queues Details screen to maintain service queues in your system. You can define as many service queues as required to fulfill the requirements of your customer service operation. You can define the owner of the service queue, specify contact information, and assign teams and individual CSRs to the queue.

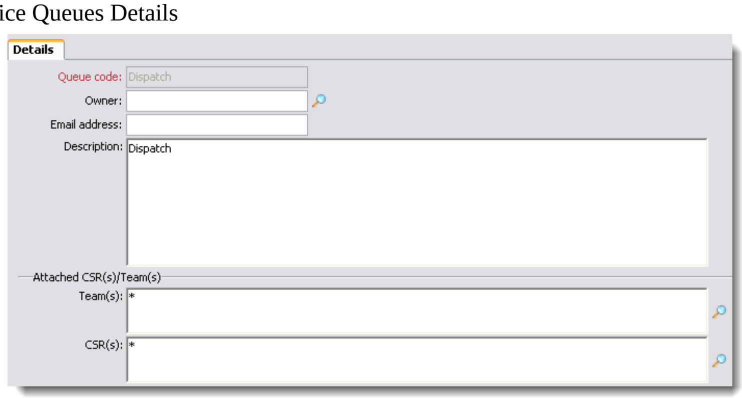
Only users belonging to an assigned team—or those assigned individually—can access the issues for that queue. If a queue is not assigned to a team or individual, then it is available to all users and any user can select issues from any queue for processing.

1 Choose Customer Service|Service Queues. The Service Queues browser displays the service queues currently defined in the system.

2 Right-click the Service Queues browser and choose Add from the menu.

   Note This menu also contains options for deleting and editing existing queues.

Fig. 19.1
Service Queues Details



Queue Code. Enter a unique code to identify the service queue.

Owner. Enter the owner of the service queue. The owner will be responsible for resolving the customer issues represented by the issues.

Email Address. Enter the e-mail address that is assigned to this queue.

Description. Enter a description of the service queue.

Provide the following information about teams or individual CSRs associated with the service queue.

Team. Enter a team to associate with the service queue. Any member of the assigned team can handle an issue for the service queue.

CSR(s). Enter the individual CSRs associated with the service queue. A CSR must be a user already defined in the system. When the CSR logs in to the system, the system detects their user ID and provides them access to their assigned service queues.

Chapter 20

Maintaining CSRs

This section describes how to maintain CSR information in your system. It discusses the following topics:

Overview 214
Explains how CSRs are used.

Defining a CSR 214
Explains how to use CSR Maintenance.

Overview

CSRs are a direct point of contact for customers; consequently it is vital to the efficiency of your organization’s service function that CSRs are able to perform their responsibilities as effectively as possible.

Using the CSR maintenance features in the Customer Service module, you can record various types of CSR-related information, such as contact and vacation details, assigned service issue queues, and so on.

Defining a CSR

Use the CSR Maintenance screen to maintain CSR-related information, such as personal details and contact information, vacations, preferences, and assigned queues.

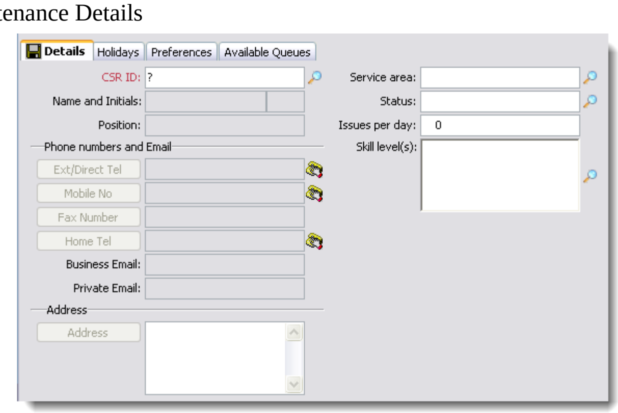
1. Choose Customer Service|CSR Maintenance. The CSR Maintenance browser displays the CSRs currently defined in the system.
2. Right-click the CSR Maintenance browser and choose Add from the menu.

   Note This menu also contains options for deleting and editing existing CSRs.

Details

Use the Details tab to record identifying information for a CSR, such as their CSR ID, name, position, and so on.

Fig. 20.1
CSR Maintenance Details



CSR ID. Enter a unique code for the CSR.

Name and Initials. Enter the name and initials for the CSR.

Position. Enter the position held in the organization by the CSR; for example, Support Analyst.

Service Area. Enter the service area in which the CSR operates.

Status. Enter a status for the CSR. For example, enter Active to indicate that the CSR is currently performing this function.

Issues per Day. Enter the number of issues that the CSR can be expected to handle during a normal business day. This value may be affected by the skill level rating.

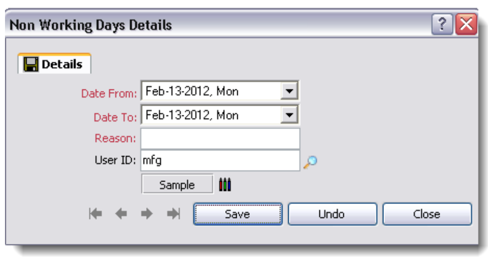
Skill Level(s). Enter a skill level for the CSR. For example, this might be a rating of their technical ability.

Specify contact information for the CSR as required.

Holidays

Use the Holidays tab to record vacation information. Click the Holidays tab and then right-click the Holidays browser. Choose Add from the right-click menu to display the Non-Working Days Details dialog box. Enter and save the holiday information as required.

Fig. 20.2
Non-Working Days Details

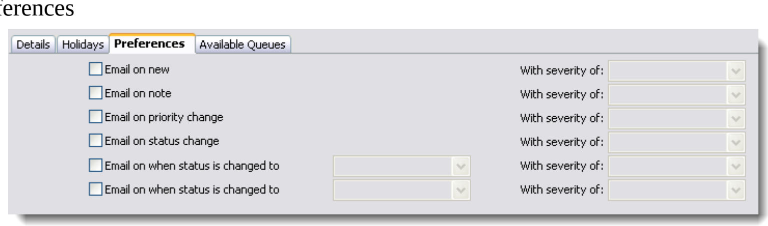


Preferences

Use the Preferences tab to define the conditions and associated severities that cause e-mail to be sent to the CSR.

E-mail templates can be defined according to your organization’s requirements. For details, refer to *Administration Guide: QAD Customer Relationship Management.*

Fig. 20.3
Preferences



Select any Preferences options as required and specify a severity.

Email on New. Send e-mail to the selected CSR whenever a new issue is entered into the system.

Email on Note. Send an e-mail to the selected CSR whenever a note is entered into the system for this issue.

Email on Priority Change. Send an e-mail to the selected CSR whenever the priority of an issue in the system is modified.

Email on Status Change. Send an e-mail to the selected CSR whenever the status of an issue in the system is modified. If the status specified has a subsequent status, you can specify that an e-mail should be sent when the issue is given this status in order to track the progress of an issue through customer service.

For details on maintaining the status of customer service issues see “Maintaining Service Issue Status” on page 192.

Available Queues

Use the Available Queues tab to view the service queues associated with a CSR. For details on maintaining service queues, see Chapter 19, “Managing Service Queues,” on page 211.

Chapter 21

Defining Customer Service Settings

This section describes how to define customer service settings. It discusses the following topics:

Overview 218
Discusses how to handle customer service issues.

Defining Issue Settings 218
Explains how to use the Issue Settings screen.

Defining Service Contract Settings 219
Explains how to use the Customer Service Settings screen.

Overview

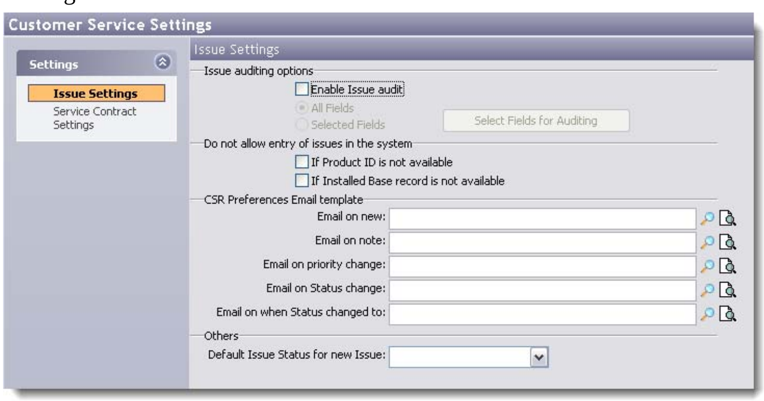
The efficient handling of customer service issues is an important component of maintaining customer satisfaction. Using the Issue Settings and Service Contract Settings features in the Customer Service module, you can define how the system handles customer service issues and service contracts.

Defining Issue Settings

Use the Issue Settings screen to define how the system handles customer service issues. For example, you can define if and how an issue should be audited, the criteria service issues must satisfy in order to be recorded in the system, preferences for e-mail templates, and so on.

1 Choose Customer Service|Customer Service Settings. The Issue Settings screen displays.

Fig. 21.1
Issue Settings



Enable Issue Audit. Select this option to enable issue auditing. Issue auditing provides a system-generated record of modifications to an issue record according to the specified settings.

Note Labels of fields that are audited display on a screen with a hash (#) prefix.

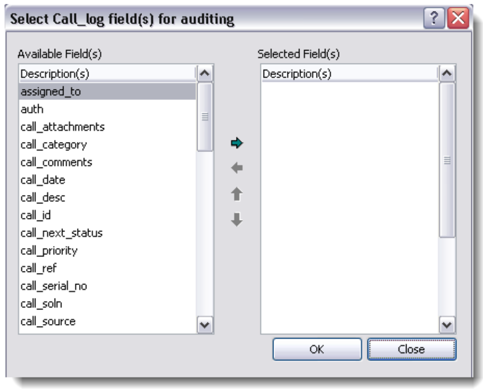
You can view audit records from the Change Log tab on the Issue Details screen; for details, see "Change Log" on page 197.

When this option is selected, the following options are available:

All Fields. All fields for the issue are audited.

Selected Fields. Only the selected fields are audited. Click the Select Fields for Auditing button and specify the fields to audit by moving fields from the Available Fields listbox into the Selected Fields listbox.

Fig. 21.2
Select Fields for Auditing



2 Specify the criteria that must be met in order for the issue to be recorded in the system.

If Product ID Is Not Available. Select this option to enable issues to be recorded for any item. Clear this option to restrict issues to those defined in your product database. This setting is generally used to restrict service to items you manufacture and sell.

If Installed Base Record Is Not Available. Select this option to enable issues to be taken for any item. Clear this option to restrict issues to those for which there is an installed base record.

3 Specify preferences for the CSR e-mail template. These preferences determine the template to use depending on the circumstance.

Note For details on maintaining e-mail templates, refer to *Administration Guide: QAD Customer Relationship Management*.

E-mail on new. Enter an e-mail template to use for a new issue recorded in the system.

E-mail on note. Enter an e-mail template to use when an issue recorded in the system has a note attached.

E-mail on priority change. Enter an e-mail template to use when an issue's priority rating is changed.

E-mail on status change. Enter an e-mail template to use when an issue's status is changed. If the status of an issue has a subsequent status, you can also use a template to indicate when the issue's status is changed to this subsequent status.

4 Specify other preferences as required.

Default Issue Status for New Issue. Select a default status for new customer service issues recorded in the system.

Defining Service Contract Settings

Use the Service Contract Settings screen to define how the system handles service contracts. For example, you can specify under which circumstances service contracts are recorded, as well as define prefix and billing frequency settings.

For information about defining service contracts see “Maintaining Service Contracts” on page 203.

1 Choose Customer Service|Customer Service Settings.

2 Click Service Contract Settings in the blue Settings area. The Service Contract Settings screen displays.

Fig. 21.3
Service Contract Settings

If Installed Base Record Is Not Available. Select this option to prevent the service contract from being entered into the system if the corresponding installed base record is not available.

Quote Prefix. Enter a prefix to affix to the quote for the service contract.

Contract Prefix. Enter a prefix that should be affixed to the contract.

Note Values specified in the Quote Prefix and Contract prefix fields are used to distinguish between database records for quotes and contracts since these records are stored in the same database table.

Billing Frequency. Enter a billing frequency for the service contract.

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

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