

Customer Relationship Management (Spec 5422)

Date Released: July 2017

Modules: Navigator Customer Relationship Management Application

Description: Add a new Navigator application.

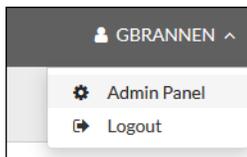
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Administration Panel

Use the Admin panel to set-up users and to establish parameters used when creating accounts and opportunities.

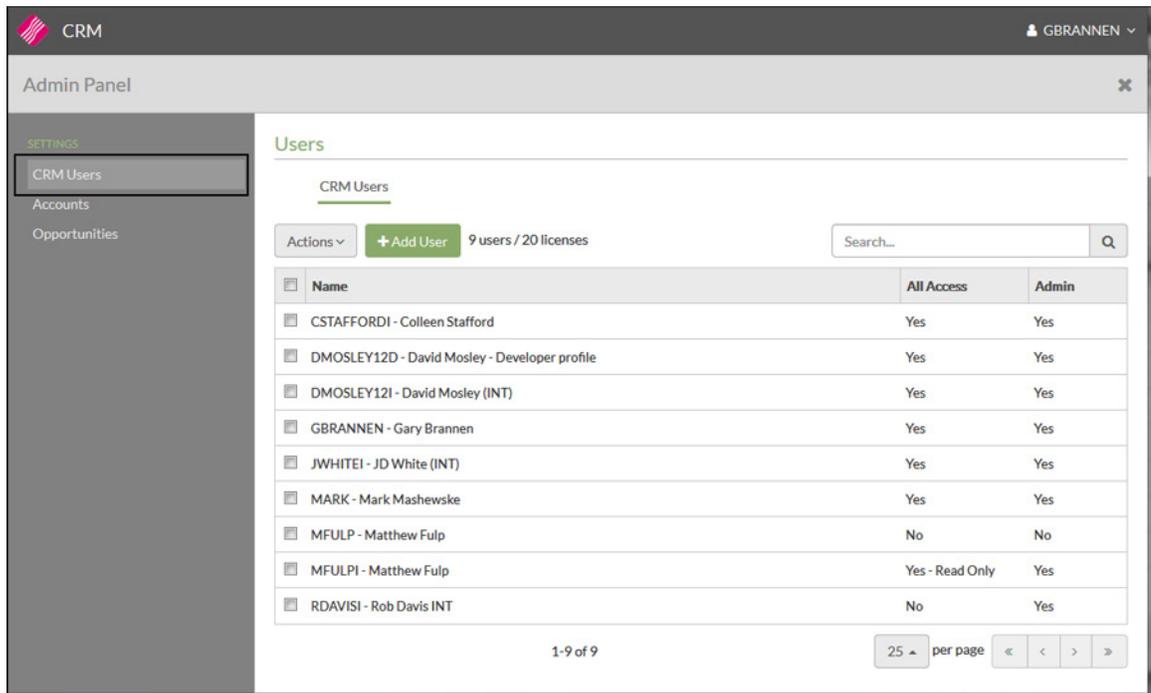
1. The Admin panel is accessed by clicking on the user name in the upper right hand corner and selecting **Admin Panel**.



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Adding CRM Users

1. Click **CRM Users**; located on the left hand side of the window.



2. Click **Add User**.

The 'Add User' dialog box is shown. It contains a 'Name' field with a dropdown arrow, and three radio button options: 'Admin', 'All Access', and 'Read Only'. At the bottom right, there are 'Save' and 'Cancel' buttons.

- **Admin** - Selecting this grants the user access to the Admin Panel.
- **All Access** - These users can access all of the information and make some changes; such as adding. This option grants edit/update access to the Account, Contacts and Opportunities information regardless of whether they created or are the owner of the information.
- **Read only** - Can only view the information. This option grants viewing access to all the Accounts, Contacts, and Opportunities created by any user. However they can only edit Accounts, Contacts, and Opportunities that they have created or have been assigned as the Owner.

Accounts

1. Click **Accounts**.

2. Add or edit the **Industry** and **Type** of account.

The screenshot shows the CRM Admin Panel with the 'Accounts' section selected. The 'Custom Values' section is expanded to show 'Industry' and 'Types' settings. The 'Industry' section has a title 'Edit Industry' and a list of values: 'Construction dsalfj asdfij jalsflsadjfsdlafj dsalfdsalkfjdsaf', 'Education', 'Government', and 'Industrial'. There is an '+Add Value' link and 'Save' and 'Cancel' buttons. The 'Types' section has a title 'Edit Types' and a list of values: 'Builder', 'Contractor', 'New Type.2', and 'Sub Contractor'. There is an '+Add Value' link and 'Save' and 'Cancel' buttons.

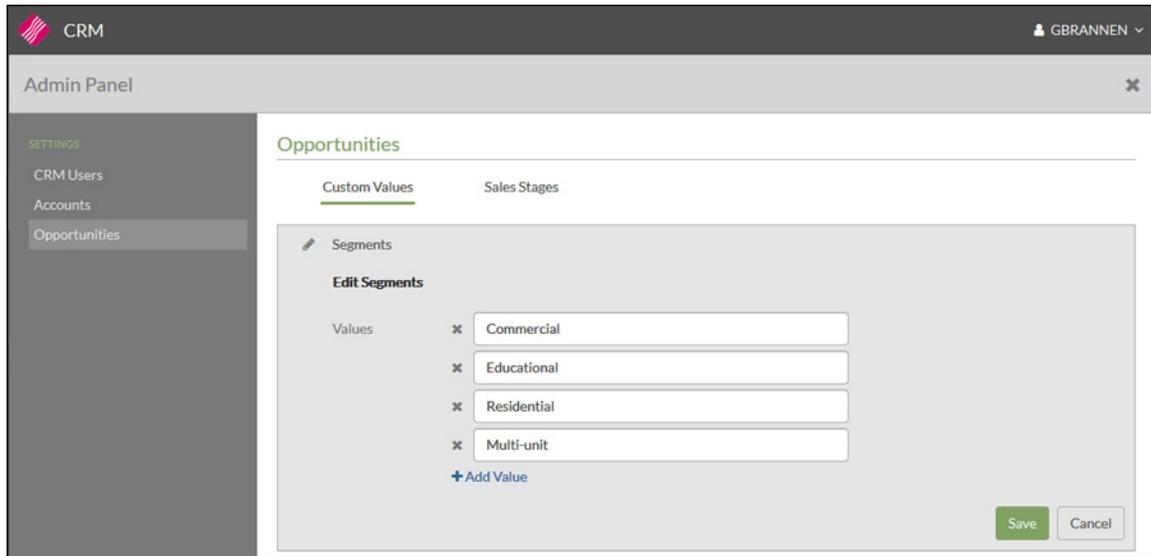
These values are used when creating new accounts.

The screenshot shows the CRM 'New Account' form. The 'Account Information' section includes fields for 'Account Name*', 'Parent Account', 'Main Phone', 'Main Fax', and 'Website'. The 'Additional Information' section includes fields for 'Owner' (set to 'GBRANNEN - Gary Brannen'), 'Status' (set to 'Active'), 'Type', 'Industry', 'Annual Revenue', 'No. of Employees', 'BillTo Association', and 'D&B'. A red box highlights the 'Type' and 'Industry' dropdown menus.

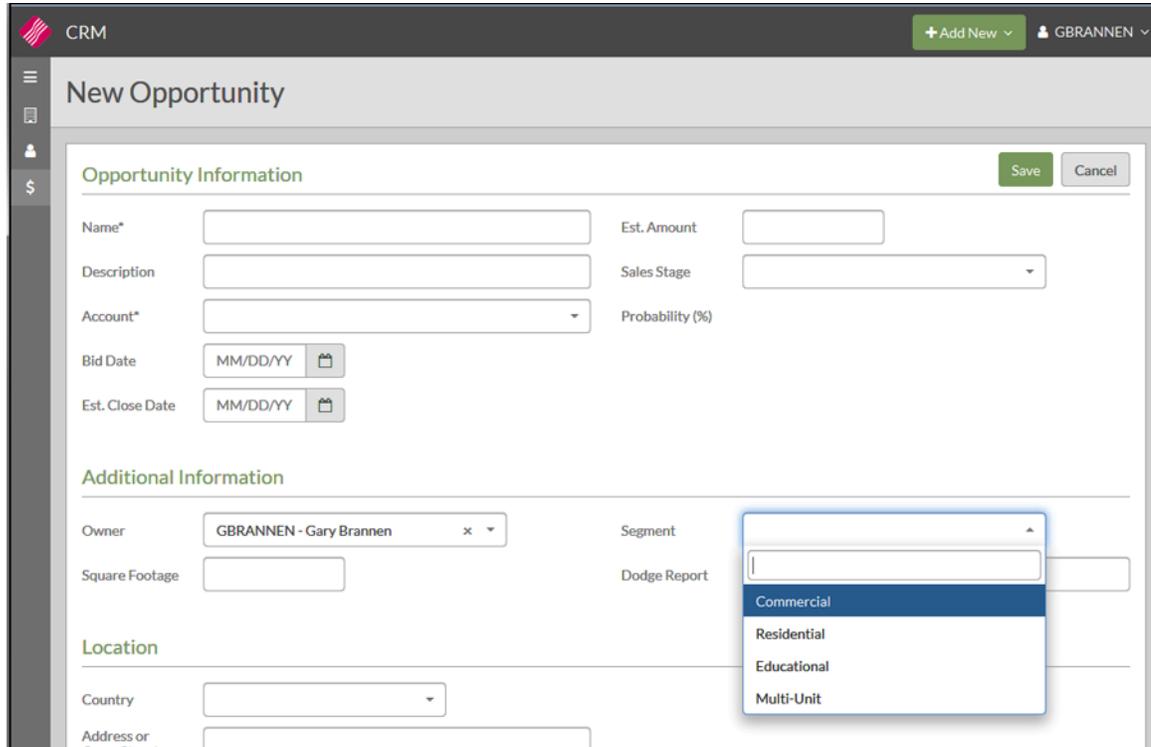
Opportunities

This part of the admin panel allows you to define the Segments and Sales Stages used when creating or editing Opportunities.

Segments



These segments populate the drop down menu when creating or editing Opportunities.



Sales Stages

The screenshot shows the CRM Admin Panel with the 'Opportunities' section selected. The 'Sales Stages' tab is active, displaying a list of stages with their respective probabilities. The 'Qualify' stage is currently selected for editing, showing a form with the following fields:

- Name: Qualify
- Probability (%): 0
- Status: Open

Buttons for 'Save' and 'Cancel' are visible at the bottom right of the edit form. Below the list, there is an 'Add Sales Stage' button.

Stage Name	Probability (%)
Qualify	0%
Presentation	10%
Develop	25%
Refine	50%
Review	75%
Negotiation	90%
Close	100%

The **Probability %** directs where the stage appears on the Opportunities window. The lower the number (the lowest is 0) the more toward the beginning of the sales cycle the stage is placed.

Note: Probability % can be incremented by 5%.

The screenshot shows the CRM Opportunity window for an opportunity named 'testing' with an estimated amount of \$758,768,768.78. The sales pipeline is displayed as a sequence of stages, each with a progress indicator:

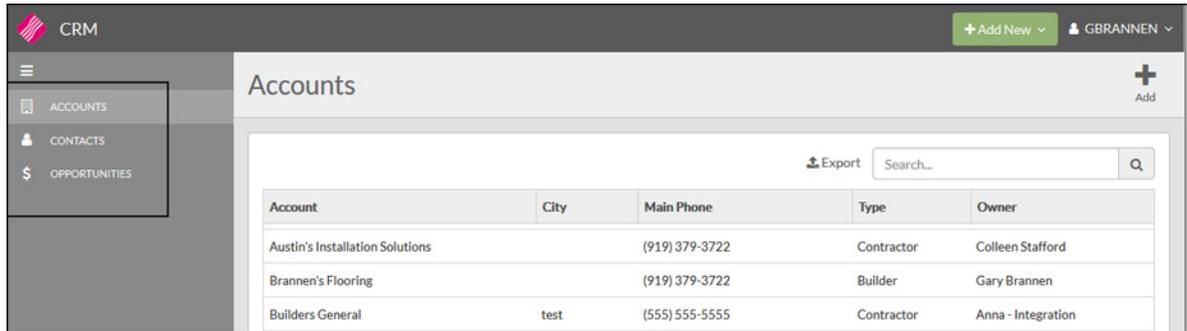
- Qualify: 75% complete (green checkmark)
- Presentation: 10% complete (green checkmark)
- Develop: 25% complete (green checkmark)
- Refine: 50% complete (green checkmark)
- Review: 75% complete (blue checkmark)
- Negotiation: 90% complete (grey circle)
- Close: 100% complete (grey circle)

The 'Review' stage is currently selected. Below the pipeline, the 'Opportunity Information' section provides details:

Field	Value	Field	Value
Name	testing	Est. Amount	\$758,768,768.78
Description		Sales Stage	Review
Account		Probability	75%
Bid Date	06/07/17		
Est. Close Date	06/20/17		

Working with the Customer Relationship Management Application

Use the links on the left hand side of the application to add/edit Accounts, Contacts, and Opportunities.



The screenshot shows the CRM application interface. On the left is a navigation menu with 'ACCOUNTS', 'CONTACTS', and 'OPPORTUNITIES'. The main area is titled 'Accounts' and contains a table with columns: Account, City, Main Phone, Type, and Owner. There are also 'Export' and 'Search...' buttons.

Account	City	Main Phone	Type	Owner
Austin's Installation Solutions		(919) 379-3722	Contractor	Colleen Stafford
Brannen's Flooring		(919) 379-3722	Builder	Gary Brannen
Builders General	test	(555) 555-5555	Contractor	Anna - Integration

Accounts

Use the Accounts view to display and edit existing accounts and add new ones.

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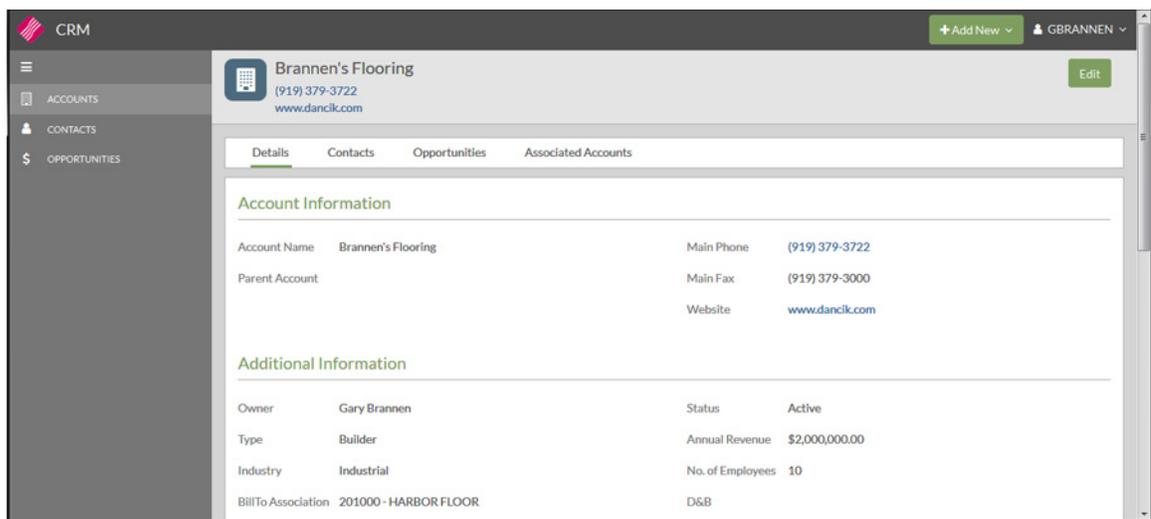
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Opportunities on page 258

Associated Accounts on page 258

Details

Click on an account to access its details.



The screenshot shows the 'Details' view for the account 'Brannen's Flooring'. It includes a header with the account name, phone number, and website, and an 'Edit' button. Below are two sections: 'Account Information' and 'Additional Information', each with a table of details.

Account Information			
Account Name	Brannen's Flooring	Main Phone	(919) 379-3722
Parent Account		Main Fax	(919) 379-3000
		Website	www.dancik.com

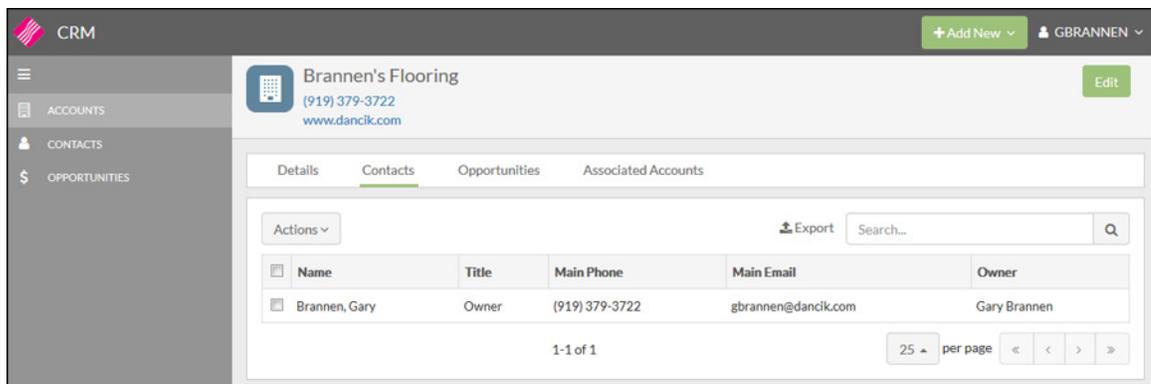
Additional Information			
Owner	Gary Brannen	Status	Active
Type	Builder	Annual Revenue	\$2,000,000.00
Industry	Industrial	No. of Employees	10
BillTo Association	201000 - HARBOR FLOOR	D&B	

Use the optional **Parent Account** setting to set up a hierarchy of Accounts. An example of how this setting can be used is for multiple chain stores that have one “parent” account. Accounts assigned to a “Parent Account” are considered Associated with the Parent account and display when **Associated Accounts** is selected.

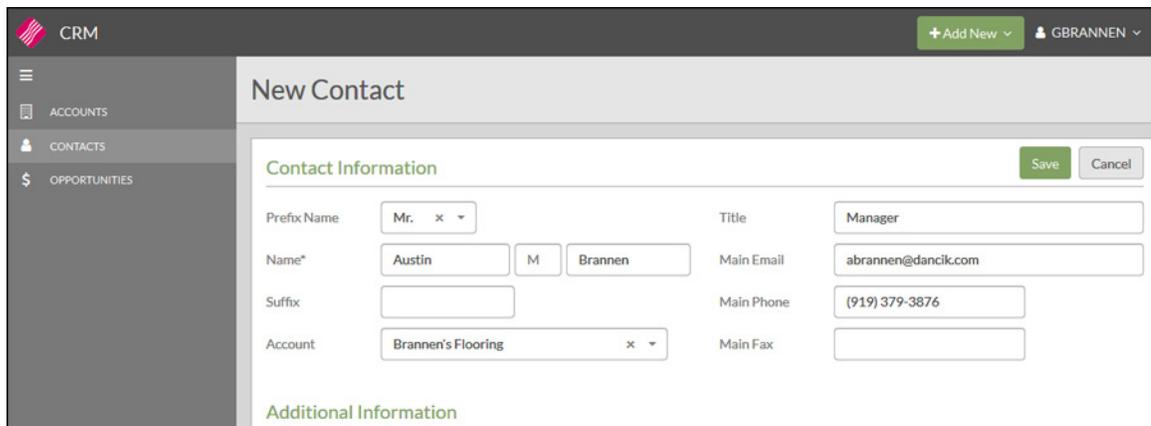
The **Billto Association** allows you to tie the account to a billto file. This association can serve as a buying account for quotes.

Enter the account’s Dun and Bradstreet number, if applicable, in the **D&B** setting. You can use the **D&B** number and the Dun and Bradstreet service to access commercial data to businesses on credit history, business-to-business sales and marketing, counter party risk exposure, supply chain management, lead scoring and social identity matching.

Contacts

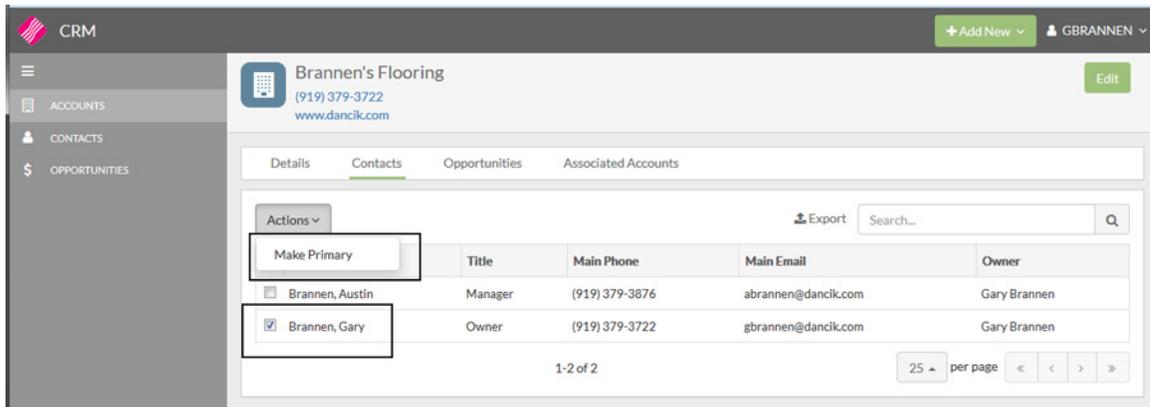


To add a new contact to the account, click **Add New** in the upper right hand corner. This brings up the Contacts window.



Add the necessary contact information and click **Save** to add the contact to the account.

Assign one of the contacts as the primary contact for the account.



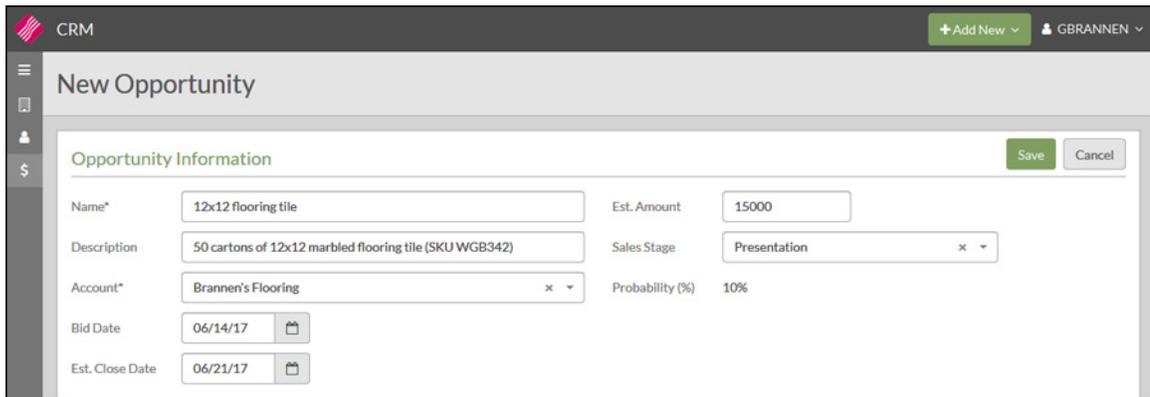
Note: There can only be one Primary contact per account.

Opportunities

Use this part of CRM to enter and track potential sales assigned to the account.

Click **Add New** in the upper right hand corner to open up the New Opportunity window.

Add information as needed.



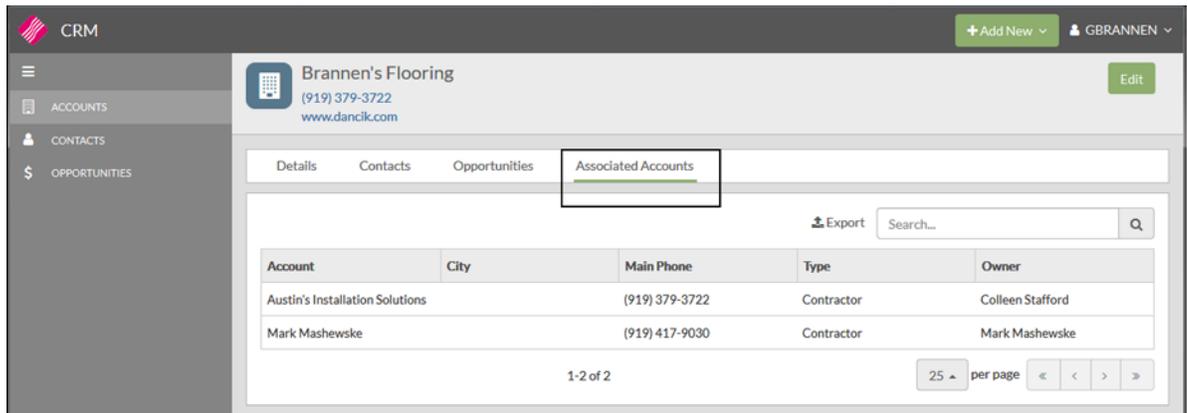
The **Sales Stage** and **Probability(%)** settings are linked via the Sales settings in the Opportunities section of the Admin panel.

Enter the Dodge Report information (Name and/or number). The Dodge Report is a comprehensive listing of Who, What, Where, When, How and How Much for a construction project.

Associated Accounts

These are accounts that share a Parent/Child relationship; as set up in the Account Detail window.

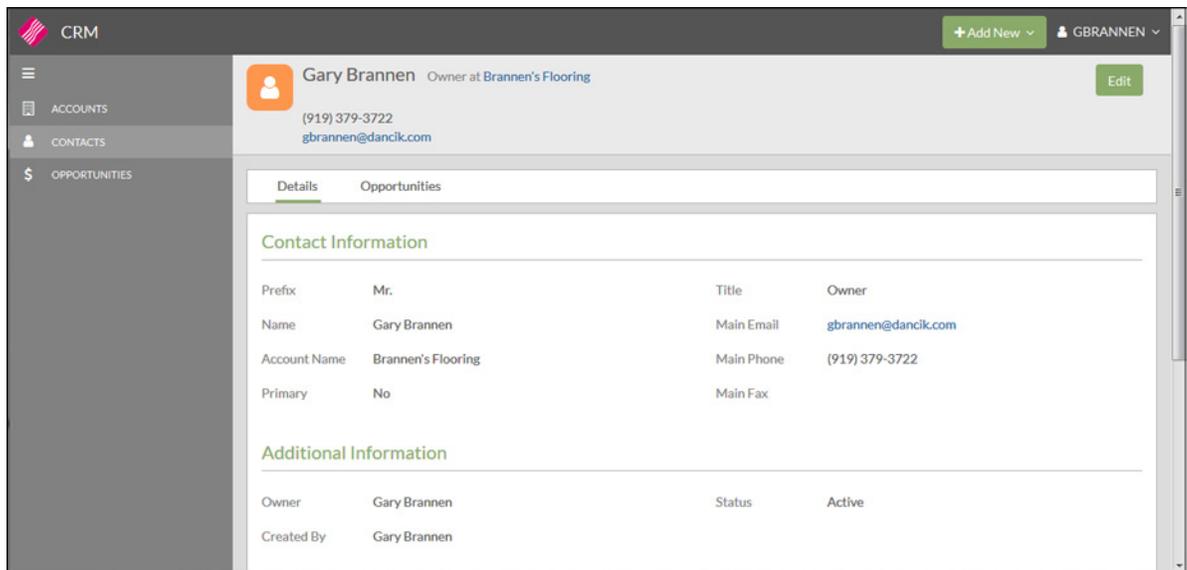
The accounts displayed are set up as “child” accounts to the active account (in this example Brannen’s Flooring).



Contacts

This is where you can add information and details about the people associated with the Accounts and Opportunities.

1. Click the **Contacts** link on the left hand side of the window to display all the existing contacts.
2. Click on a contact to access it's details.

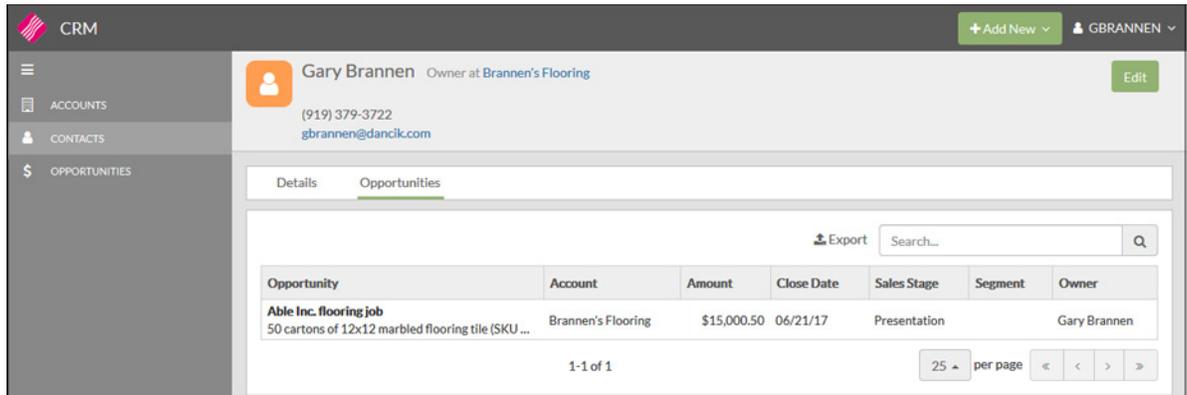


From the Contact Details window, shown above, you can:

- **Edit** the contact's detail information.
- Click **Add New** to add a new contact.

Opportunities

These are the Opportunities assigned to this contact.



The screenshot shows the CRM interface for a contact named Gary Brannen. The left sidebar has a menu with 'ACCOUNTS', 'CONTACTS', and 'OPPORTUNITIES'. The main content area shows the contact's details and a list of opportunities. The 'Opportunities' tab is active, displaying a table with one record.

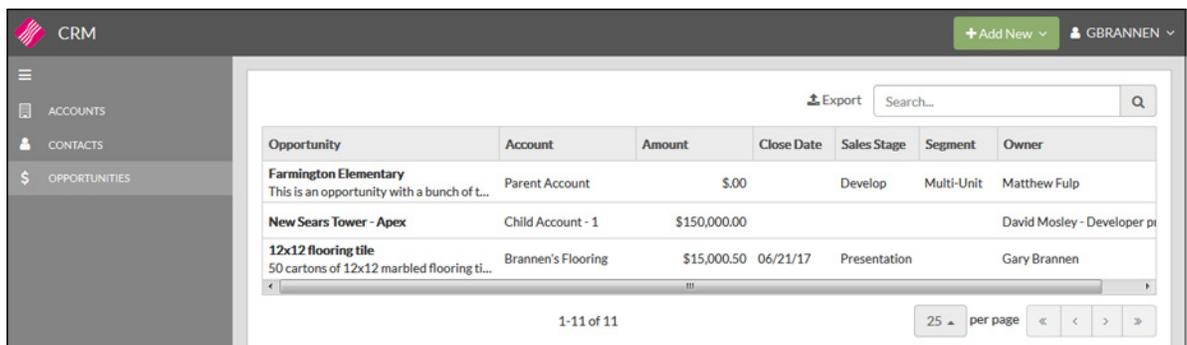
Opportunity	Account	Amount	Close Date	Sales Stage	Segment	Owner
Able Inc. flooring job 50 cartons of 12x12 marbled flooring tile (SKU...	Brannen's Flooring	\$15,000.50	06/21/17	Presentation		Gary Brannen

1-1 of 1

Contacts are associated to Opportunities via the Contacts tab in the Opportunities workflow.

Opportunities

This part of CRM allows you to add new Opportunities or edit existing ones.



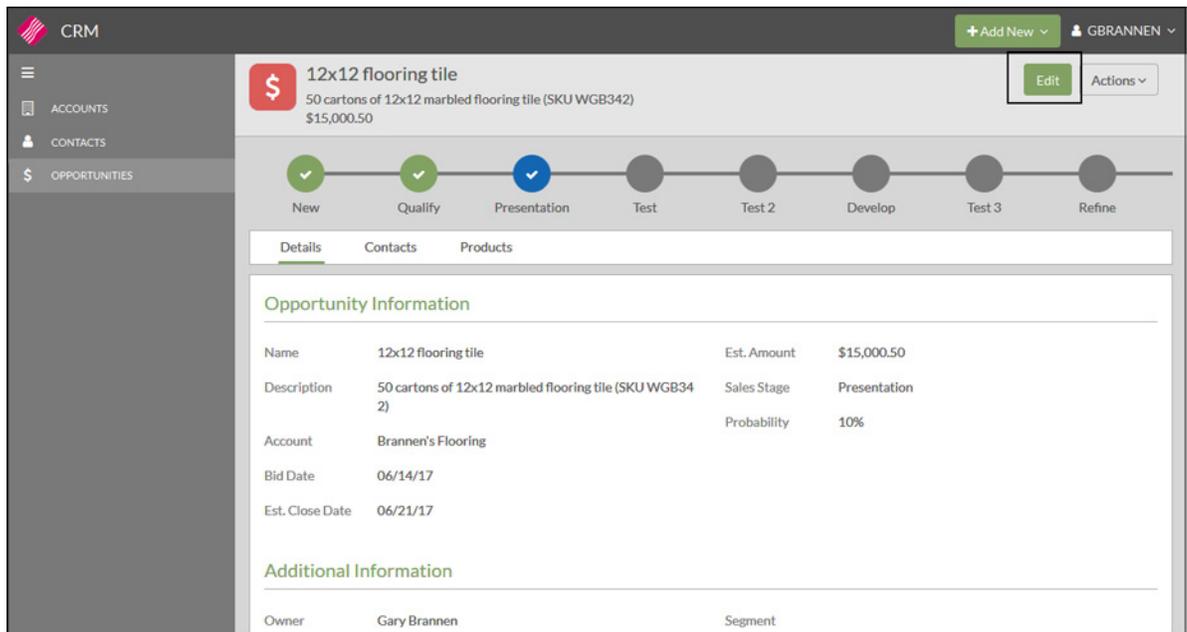
The screenshot shows the CRM interface with the 'Opportunities' tab selected in the sidebar. The main content area displays a list of opportunities in a table format. The 'Add New' button is visible in the upper right corner.

Opportunity	Account	Amount	Close Date	Sales Stage	Segment	Owner
Farmington Elementary This is an opportunity with a bunch of t...	Parent Account	\$0.00		Develop	Multi-Unit	Matthew Fulp
New Sears Tower - Apex	Child Account - 1	\$150,000.00				David Mosley - Developer p...
12x12 flooring tile 50 cartons of 12x12 marbled flooring ti...	Brannen's Flooring	\$15,000.50	06/21/17	Presentation		Gary Brannen

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Click **Add New** in the upper right-hand corner to add a new record.

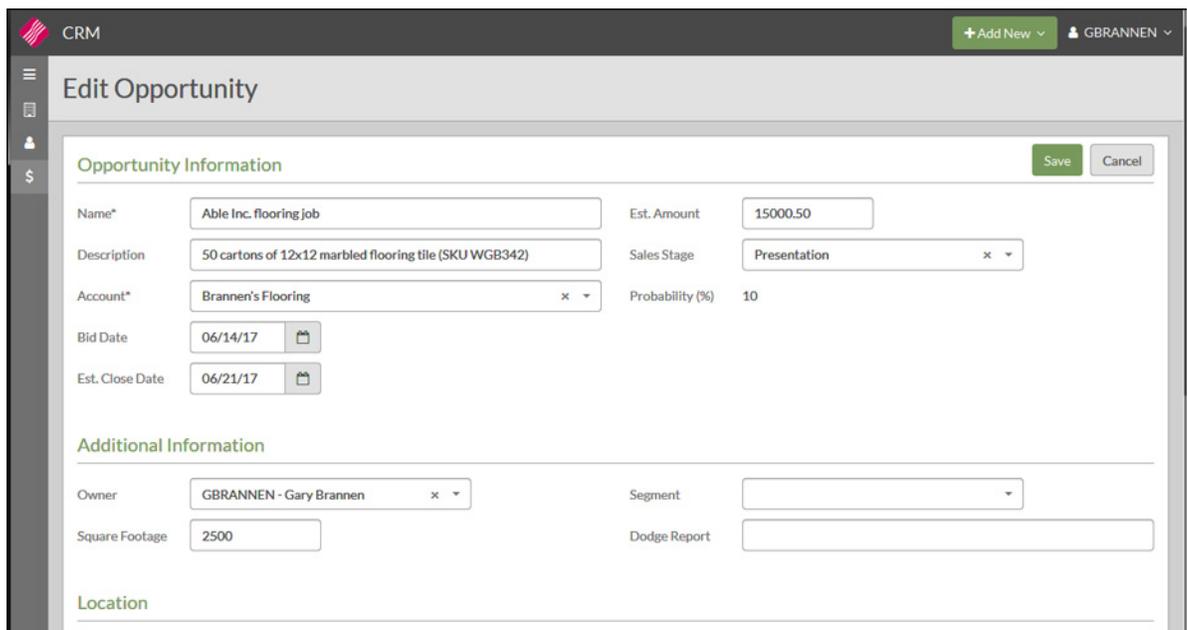
To edit an existing opportunity, click it and then click the **Edit** button.



The screenshot shows the CRM interface for an opportunity. The top navigation bar includes a menu icon, the text 'CRM', a '+ Add New' button, and a user profile 'GBRANNEN'. The left sidebar contains 'ACCOUNTS', 'CONTACTS', and 'OPPORTUNITIES'. The main content area displays the opportunity details for '12x12 flooring tile' with a value of '\$15,000.50'. A progress bar shows stages: New (checked), Qualify (checked), Presentation (active), Test, Test 2, Develop, Test 3, and Refine. Below the progress bar are tabs for 'Details', 'Contacts', and 'Products'. The 'Opportunity Information' section includes fields for Name, Description, Account, Bid Date, Est. Close Date, Est. Amount, Sales Stage, and Probability. The 'Additional Information' section includes Owner and Segment.

Field	Value
Name	12x12 flooring tile
Est. Amount	\$15,000.50
Description	50 cartons of 12x12 marbled flooring tile (SKU WGB342)
Sales Stage	Presentation
Account	Brannen's Flooring
Probability	10%
Bid Date	06/14/17
Est. Close Date	06/21/17
Owner	Gary Brannen
Segment	

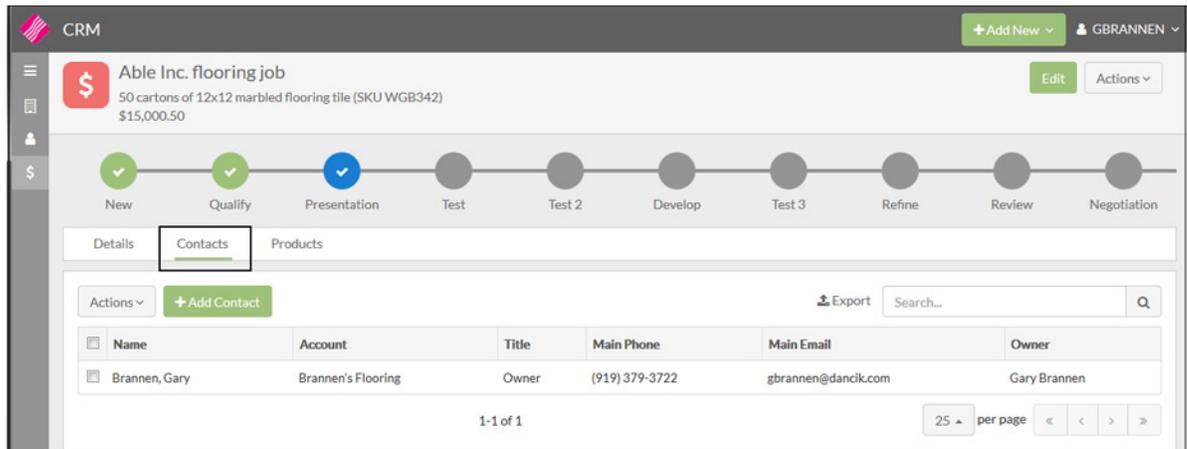
Update the information as needed.



The screenshot shows the 'Edit Opportunity' form in the CRM. The title is 'Edit Opportunity'. The form is divided into 'Opportunity Information' and 'Additional Information' sections. The 'Opportunity Information' section includes fields for Name, Description, Account, Bid Date, Est. Close Date, Est. Amount, Sales Stage, and Probability. The 'Additional Information' section includes fields for Owner, Segment, Square Footage, and Dodge Report. There are 'Save' and 'Cancel' buttons in the top right corner of the form.

Field	Value
Name*	Able Inc. flooring job
Est. Amount	15000.50
Description	50 cartons of 12x12 marbled flooring tile (SKU WGB342)
Sales Stage	Presentation
Account*	Brannen's Flooring
Probability (%)	10
Bid Date	06/14/17
Est. Close Date	06/21/17
Owner	GBRANNEN - Gary Brannen
Segment	
Square Footage	2500
Dodge Report	

Click **Save** to retain any changes and to return to the main opportunities window where we can add Contacts.



Click **Add Contact** and then search for the contact.

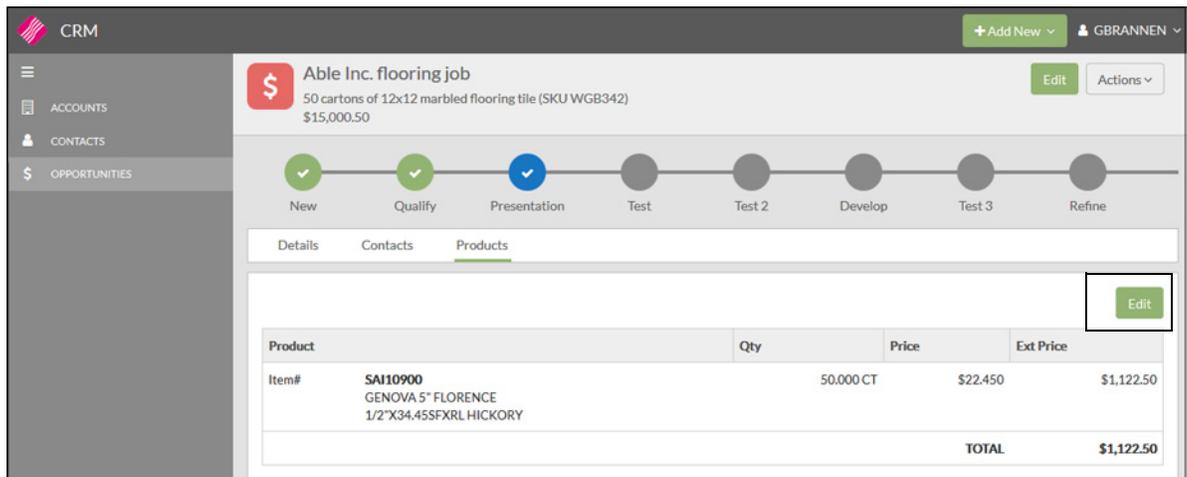
To establish a primary contact for the Opportunity, select the contact and then click **Make Primary** from the **Actions** drop down.

Note: A star denotes the contact as the primary.

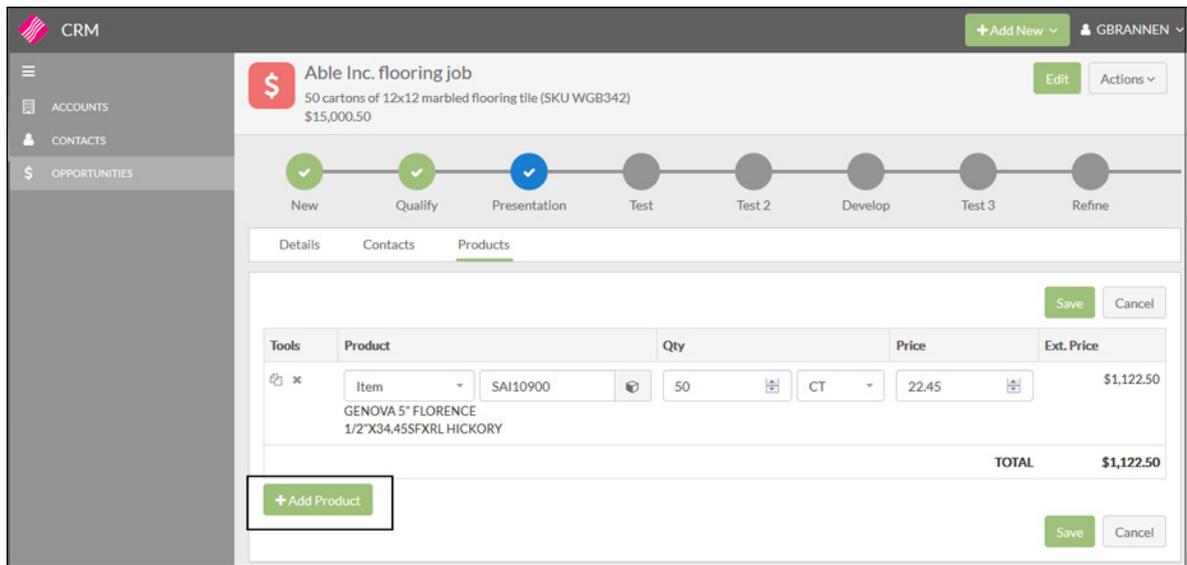
Products

The **Products** tab allows you to search on and then add items.

Click **Edit**, to add new entries.



On the window that appears, click **Add Product**.



Select a one of the following Product Types from the drop down.

- Manufacturer
- Item
- Price Class
- Product Line

The **Product Type** selected determines what can be entered into the **Value** setting.

If you are working with Items, the **UOM** and **Price** is imported in from the Item File.