Customer Relationship Management (Spec 5422)

Date Released: July 2017

Modules: Navigator Customer Relationship Management Application

Description: Add a new Navigator application.

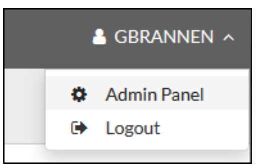
Administration Panel on page 251

Working with the Customer Relationship Management Application on page 256

Administration Panel

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

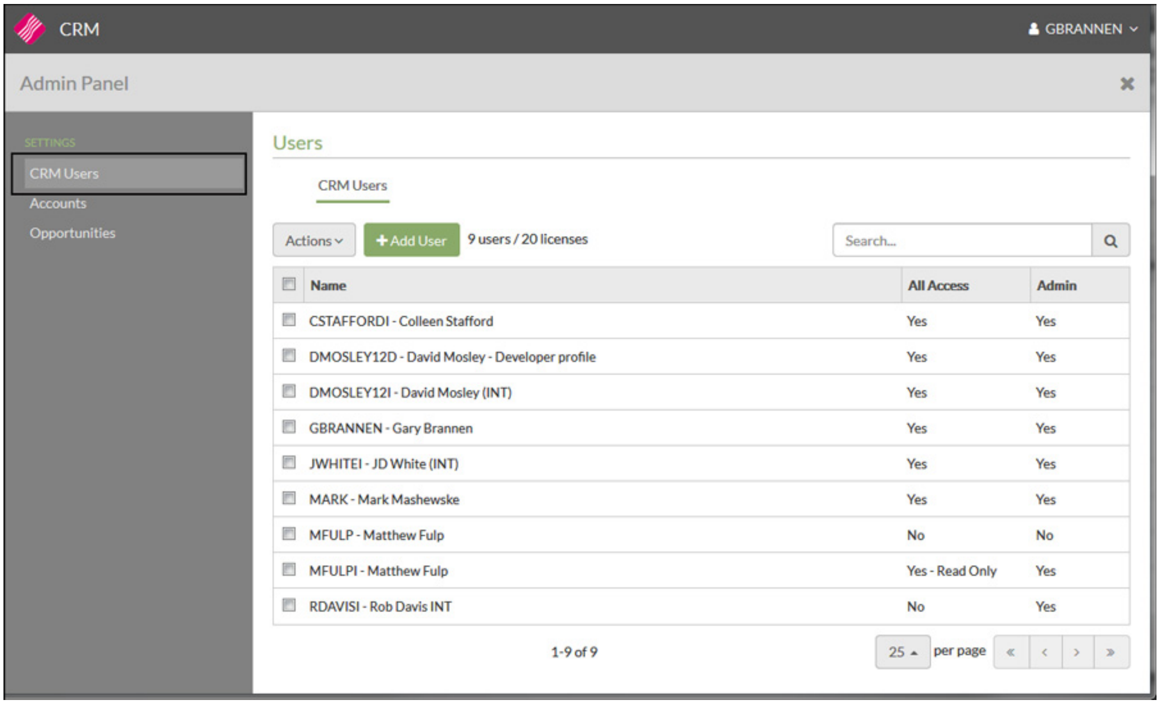
1. The Admin panel is accessed by clicking on the user name in the upper right hand corner and selecting **Admin Panel.**



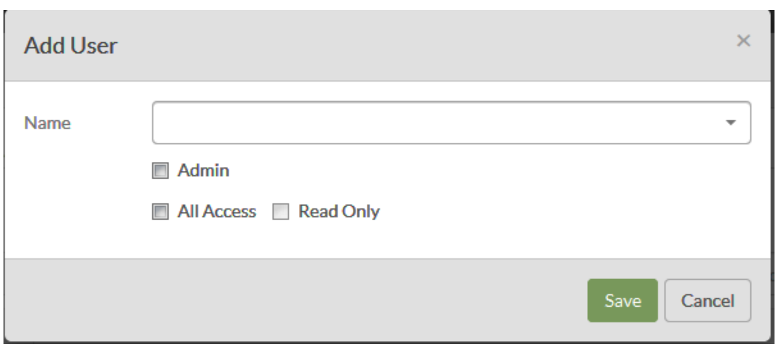
- *Adding CRM Users on page 252*
- *Accounts on page 252*
- *Opportunities on page 254*

Adding CRM Users

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



2. Click **Add User**.

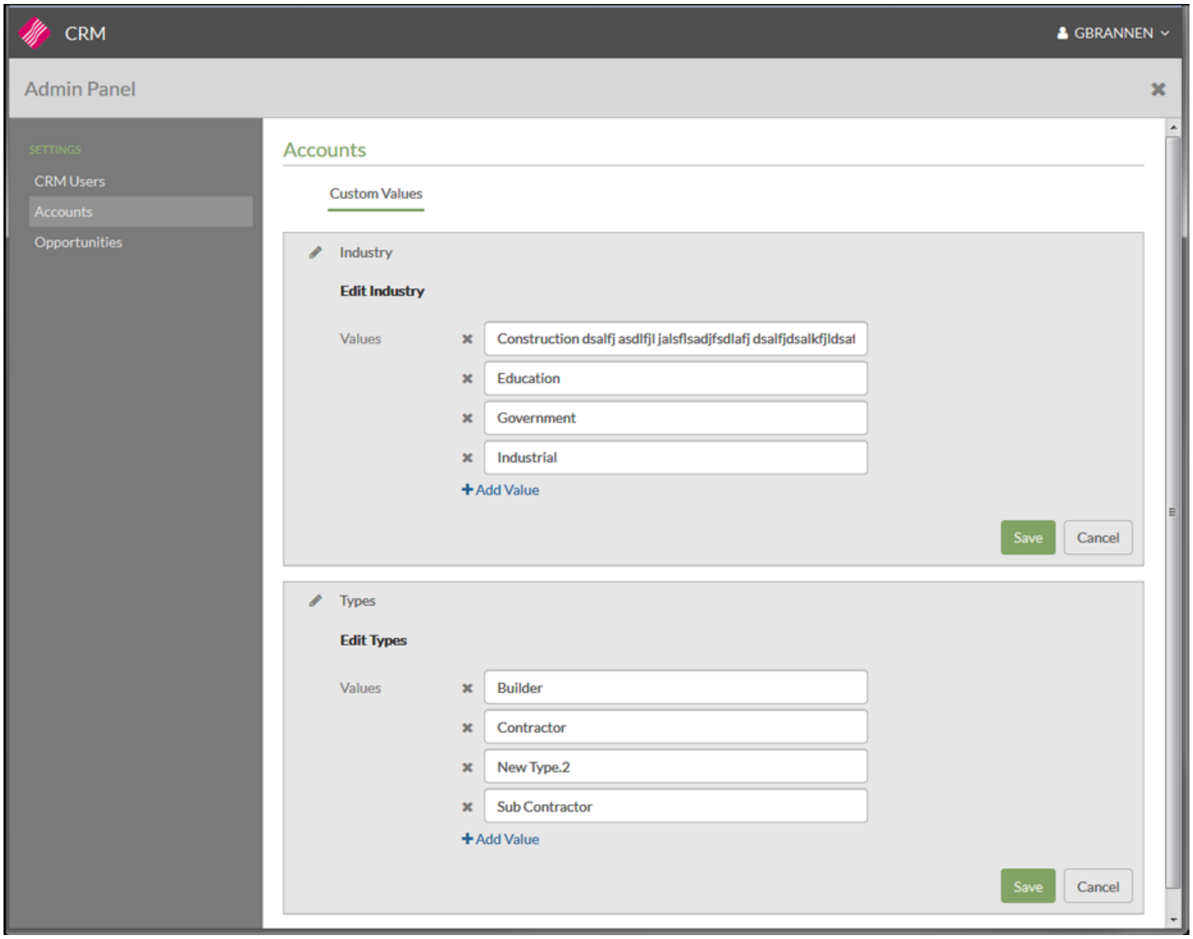


- **Admin** - Selecting this grants the user access to the Admin Panel.
- **All Access** - These users can access all of the information and make some changes; such as adding. This option grants edit/update access to the Account, Contacts and Opportunities information regardless of whether they created 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.

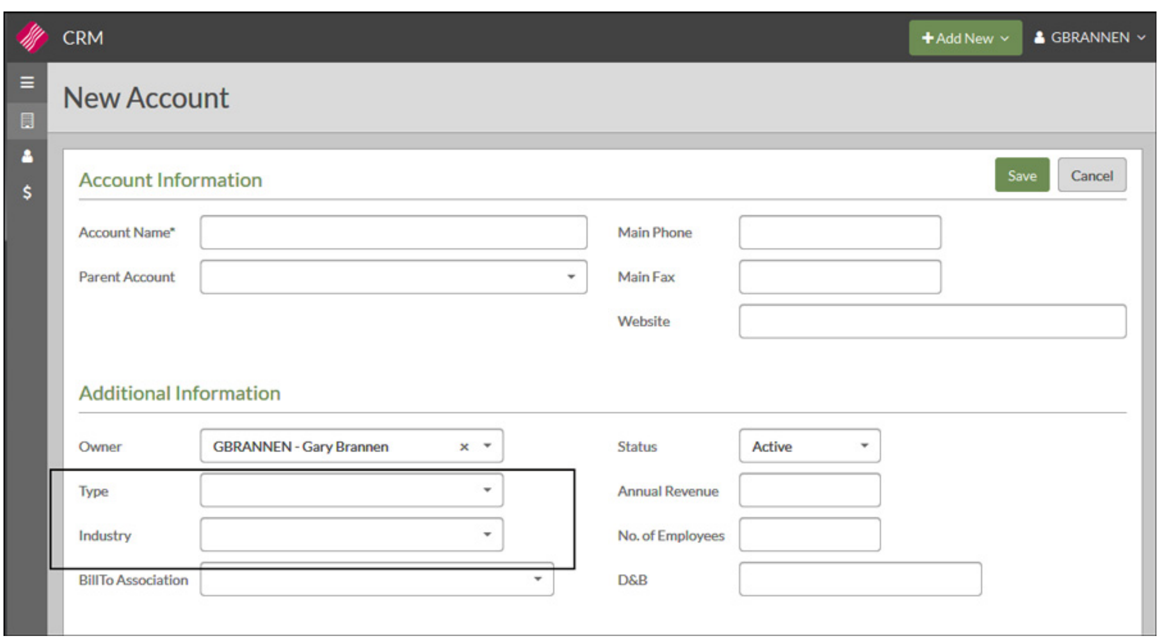
Accounts

1. Click **Accounts**.

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



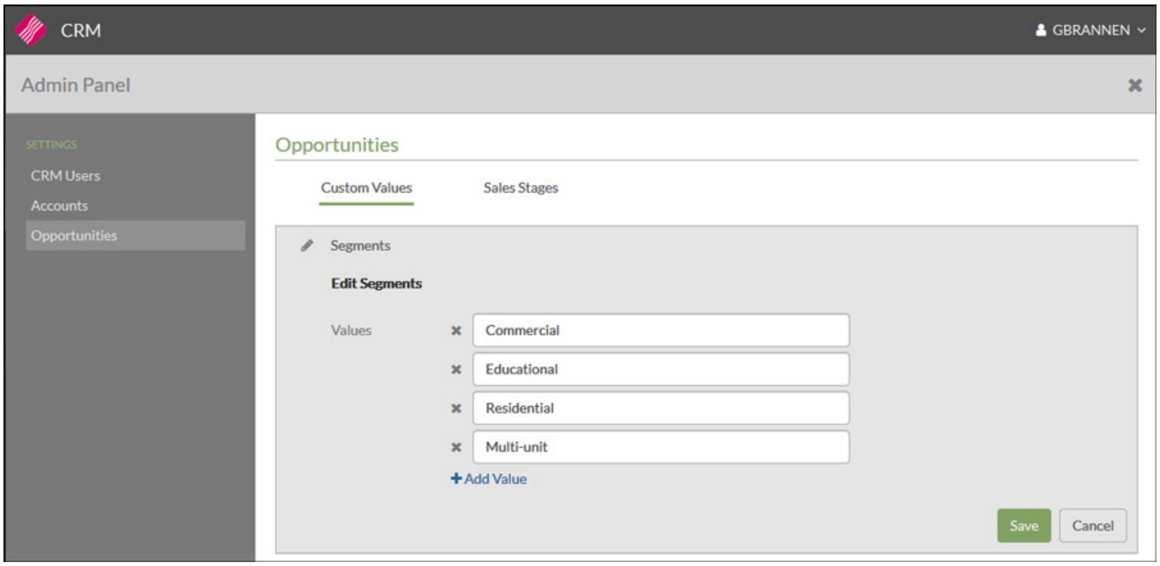
These values are used when creating new accounts.



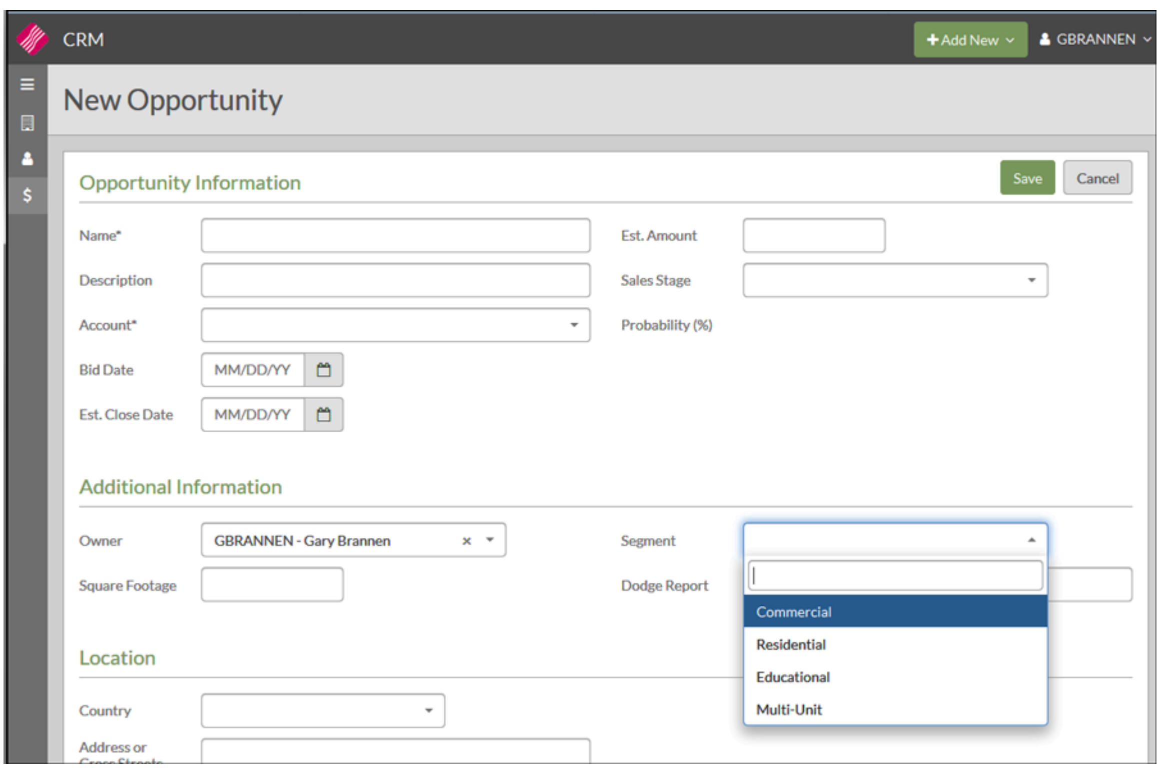
Opportunities

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

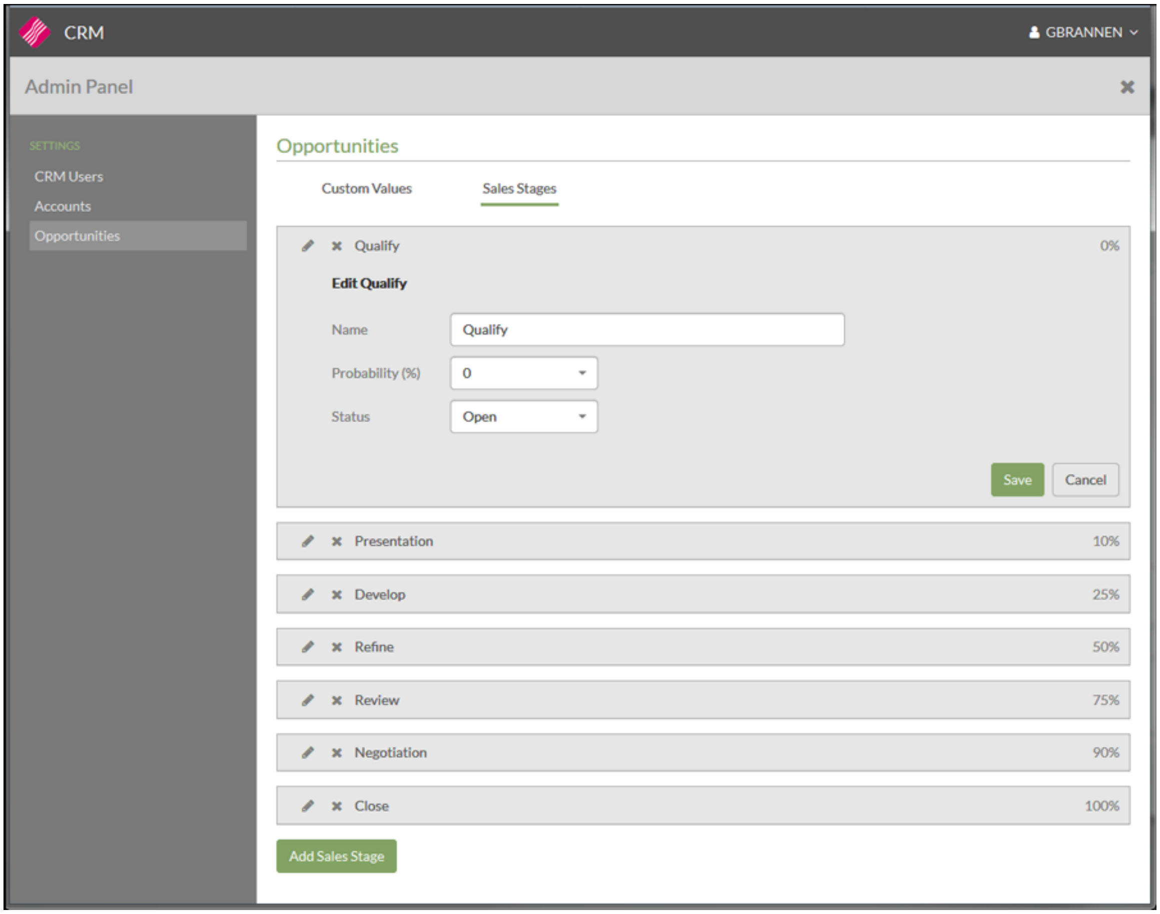
Segments



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

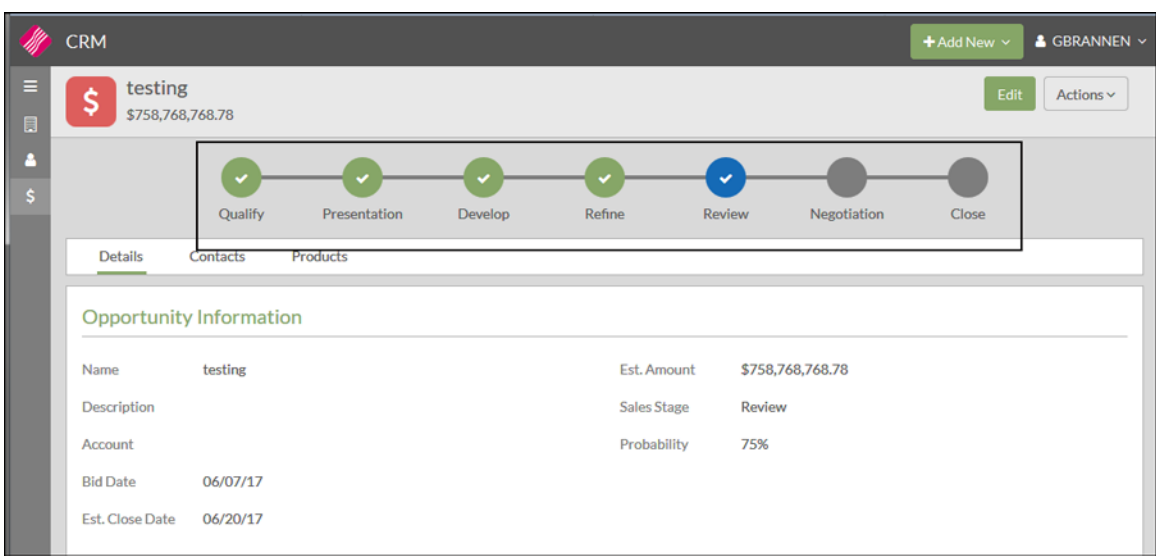


Sales Stages



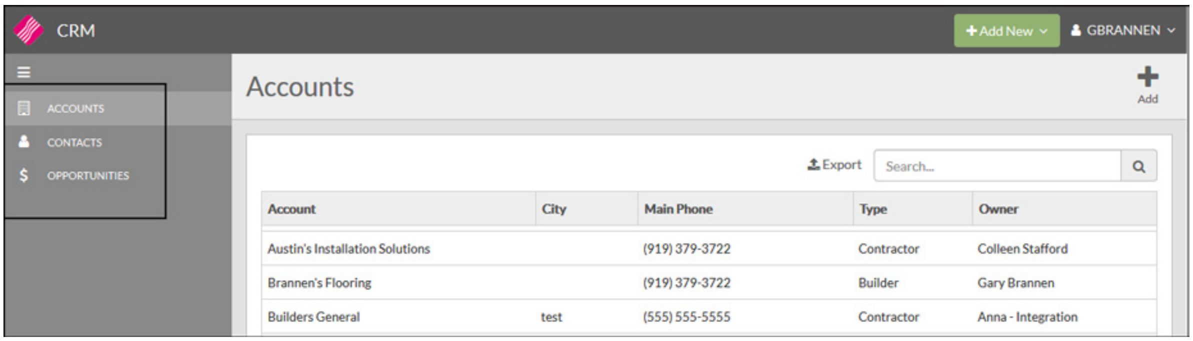
The **Probability %** directs where the stage appears on the Opportunities window. The lower the number (the lowest is 0) the more toward the beginning of the sales cycle the stage is placed.

Note: Probability % can be incriminated by 5%.



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.



Accounts

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

Details on page 256

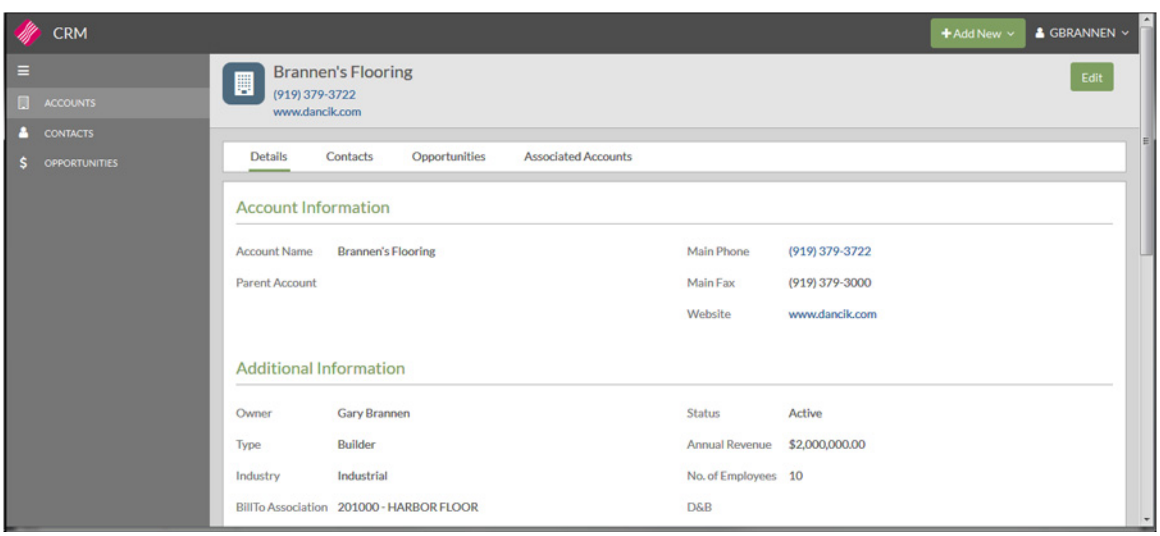
Contacts on page 257

Opportunities on page 258

Associated Accounts on page 258

Details

Click on an account to access its details.

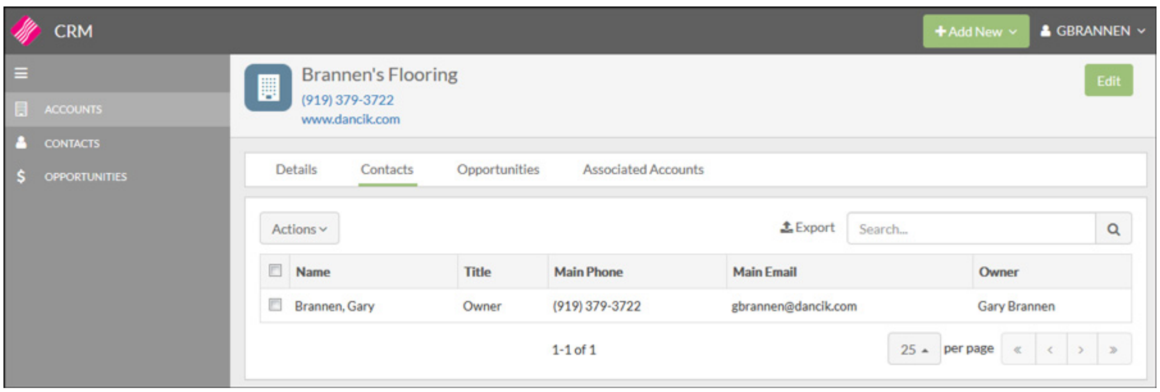


Use the optional **Parent Account** setting to set up a hierarchy of Accounts. An example of how this setting can be used is for multiple chain stores that have one “parent” account. Accounts assigned to a “Parent Account” are considered Associated with the Parent account and display when **Associated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

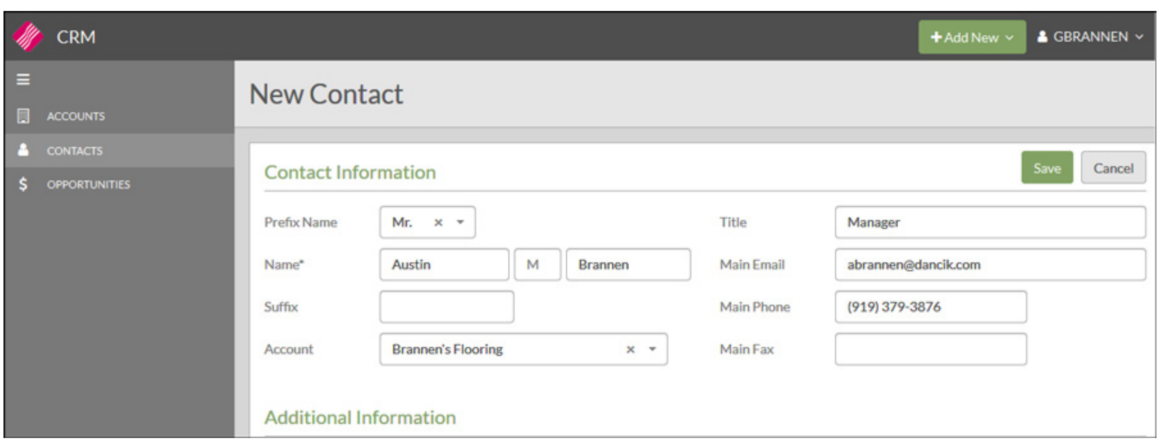
The **Billto Association** allows you to tie the account to a billto file. This association can serve as a buying account for quotes.

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

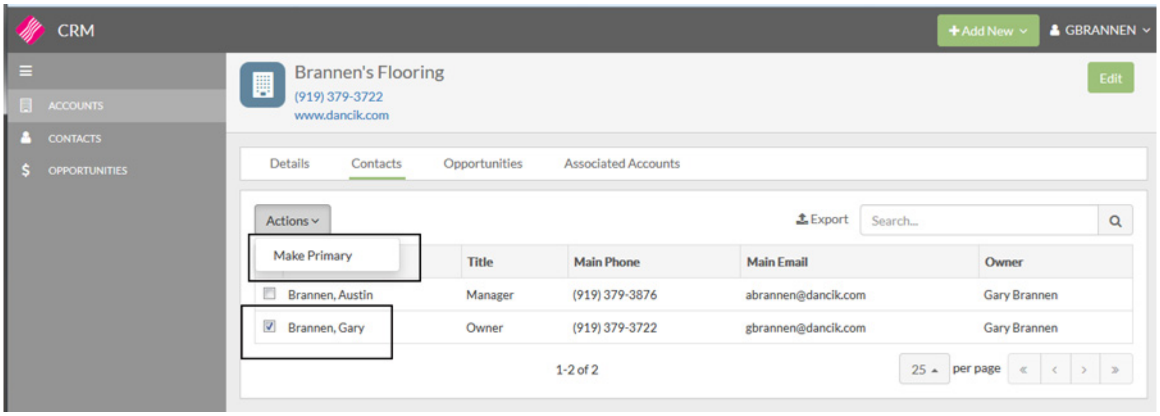


To add a new contact to the account, click **Add New** in the upper right hand corner. This brings up the Contacts window.



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.



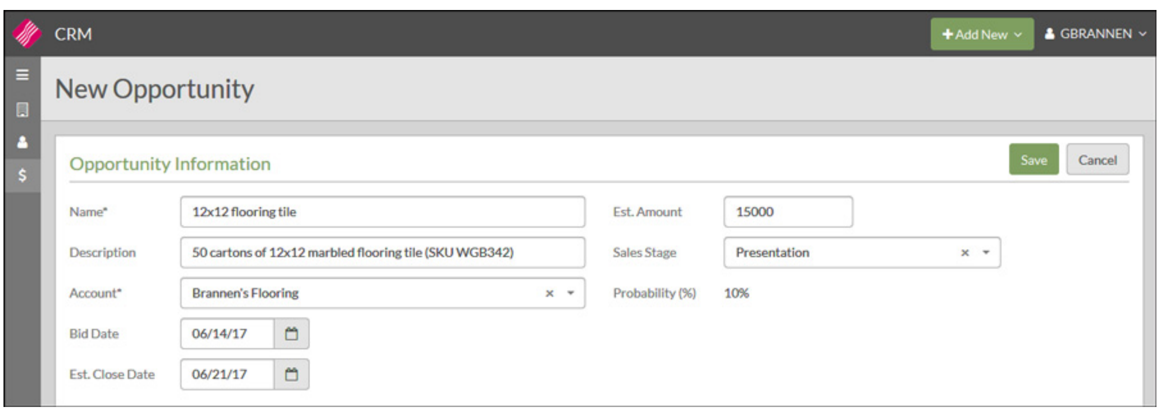
Note: There can only be one Primary contact per account.

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.



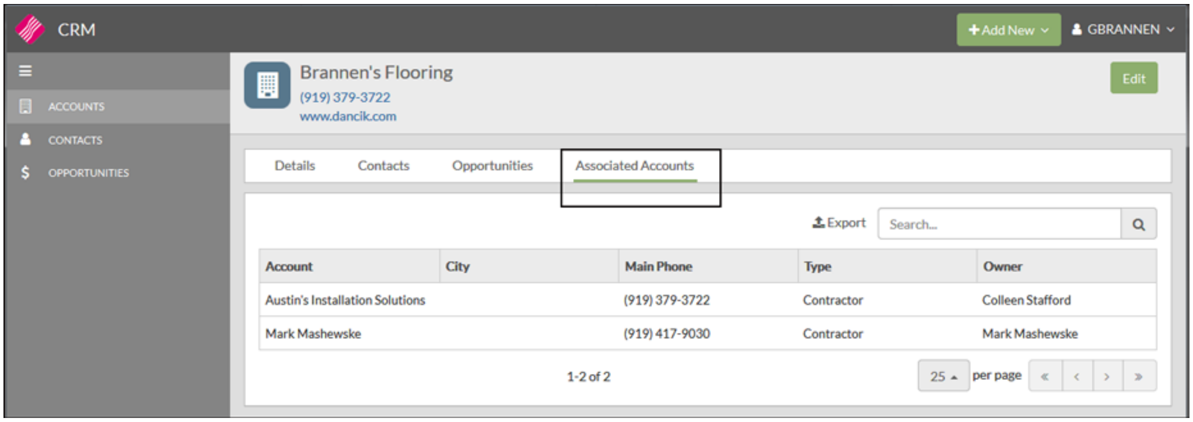
The **Sales Stage** and **Probability(%)** settings are linked via the Sales settings in the Opportunities section of the Admin panel.

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.

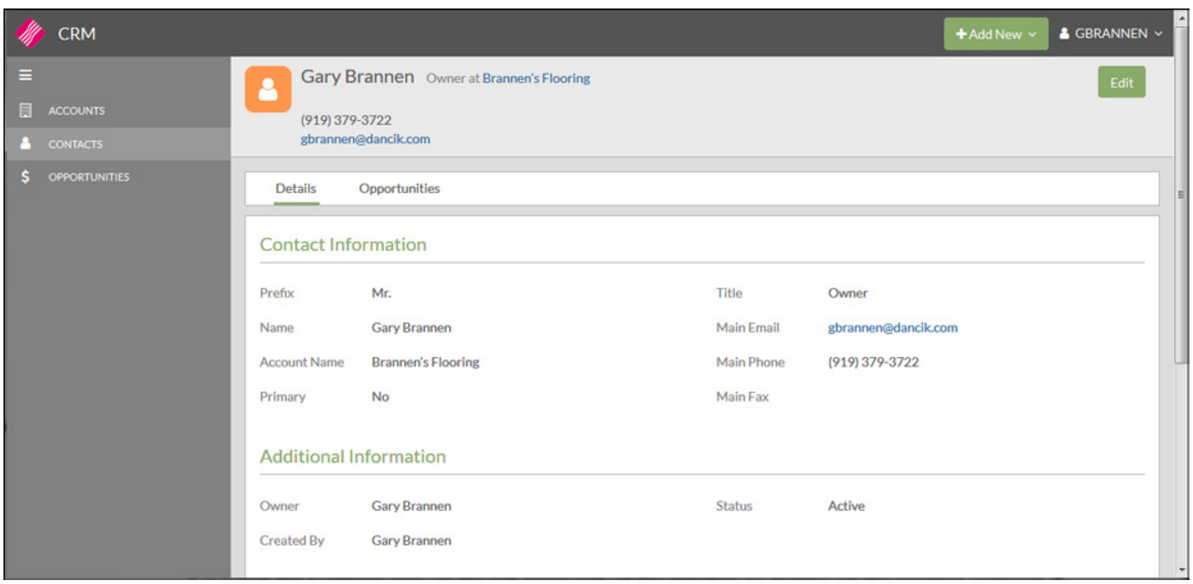
The accounts displayed are set up as “child” accounts to the active account (in this example Brannen’s Flooring).



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.

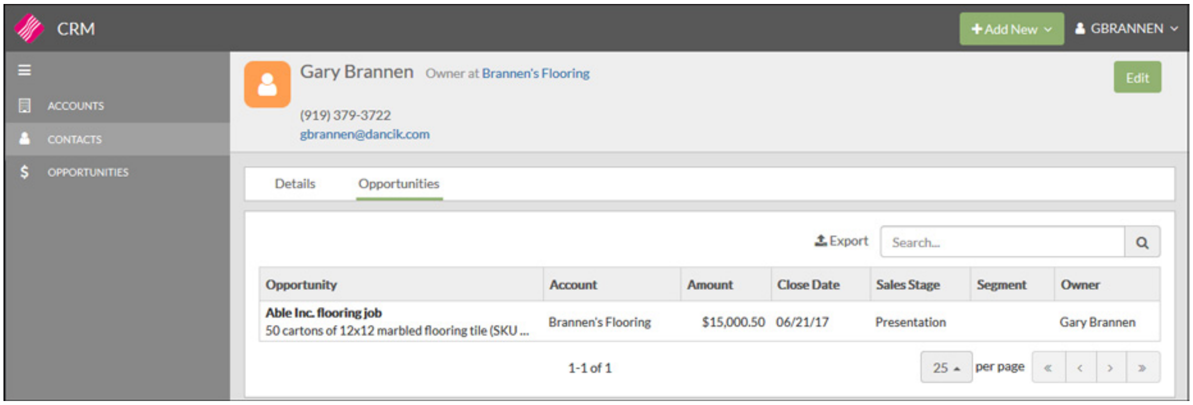


From the Contact Details window, shown above, you can:

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

Opportunities

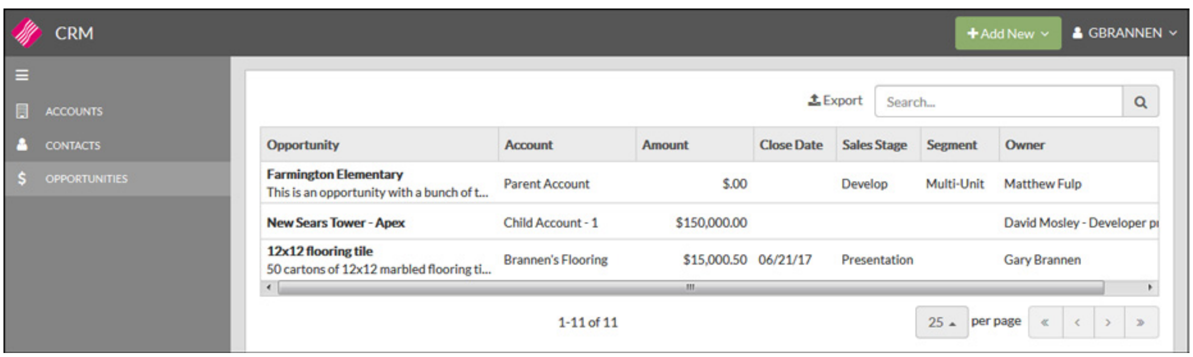
These are the Opportunities assigned to this contact.



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

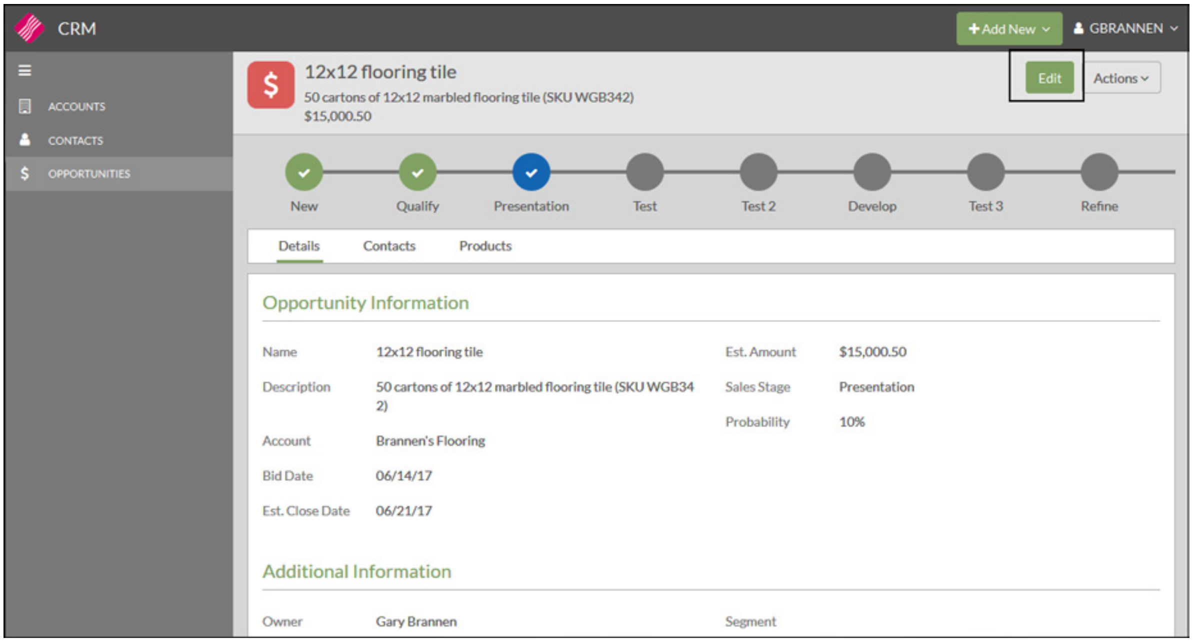
Opportunities

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

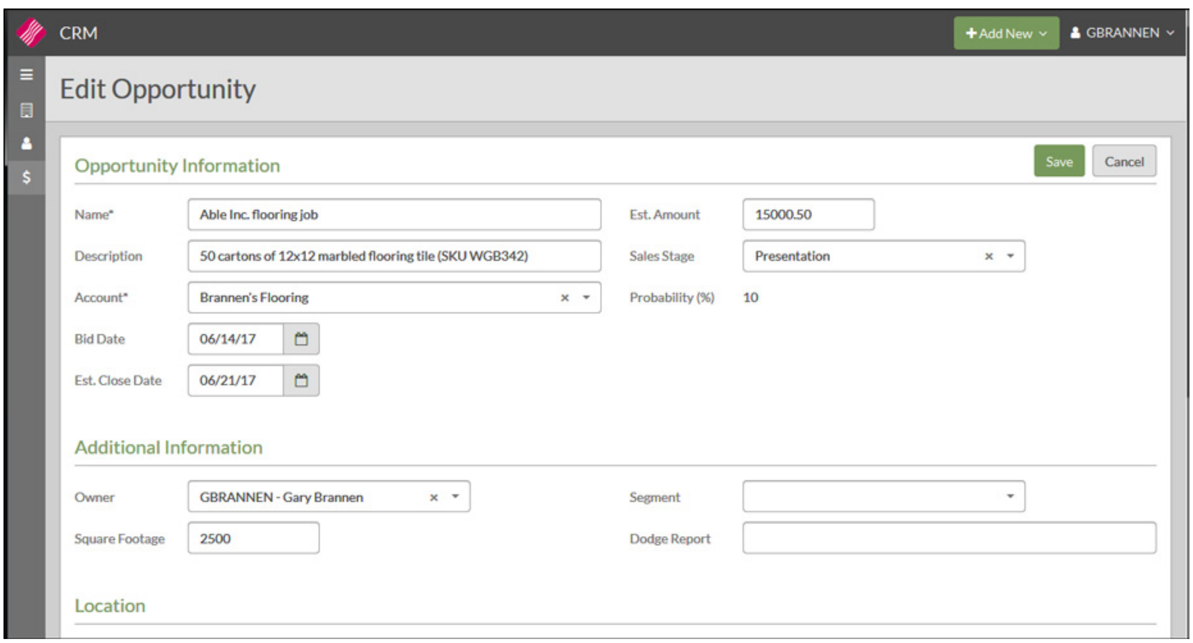


Click **Add New** in the upper right-hand corner to add a new record.

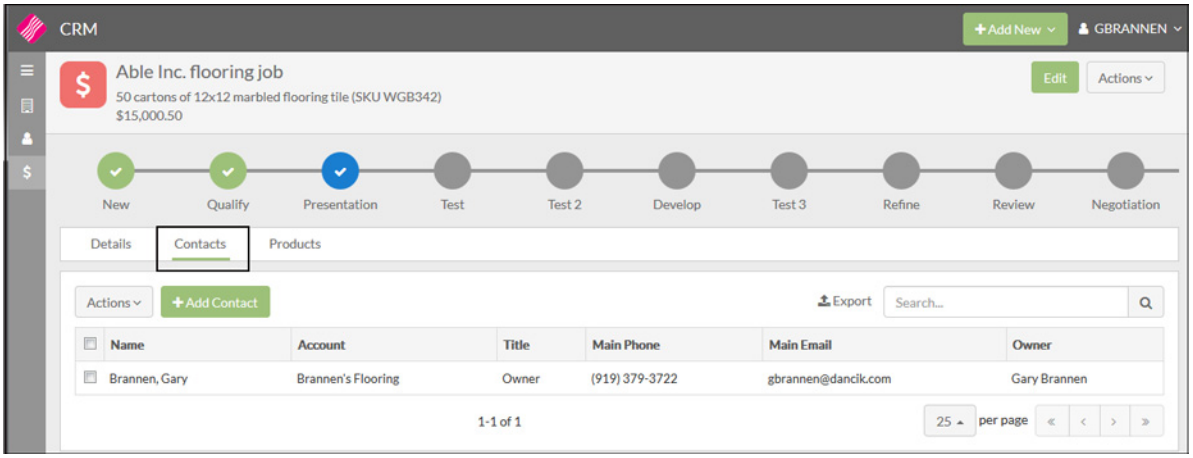
To edit an existing opportunity, click it and then click the **Edit** button.



Update the information as needed.



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.

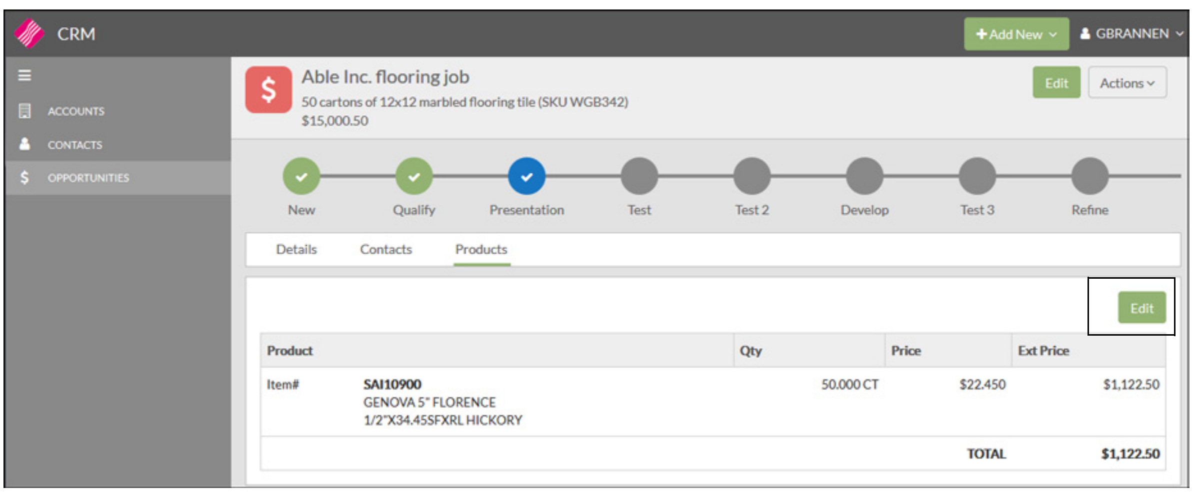
To establish a primary contact for the Opportunity, select the contact and then click **Make Primary** from the **Actions** drop down.

Note: A star denotes the contact as the primary.

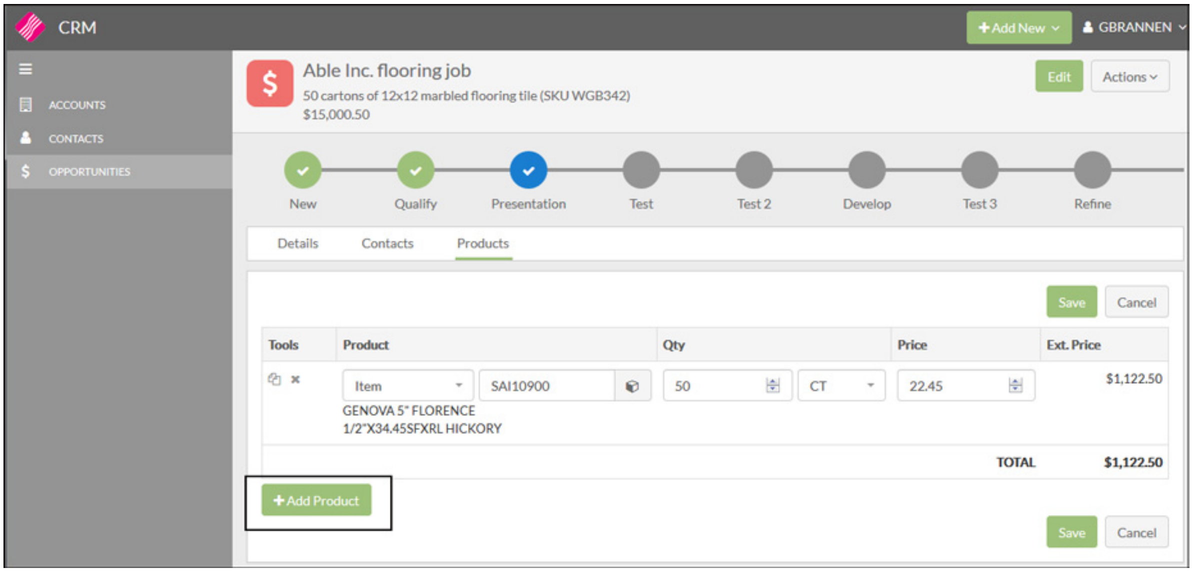
Products

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.