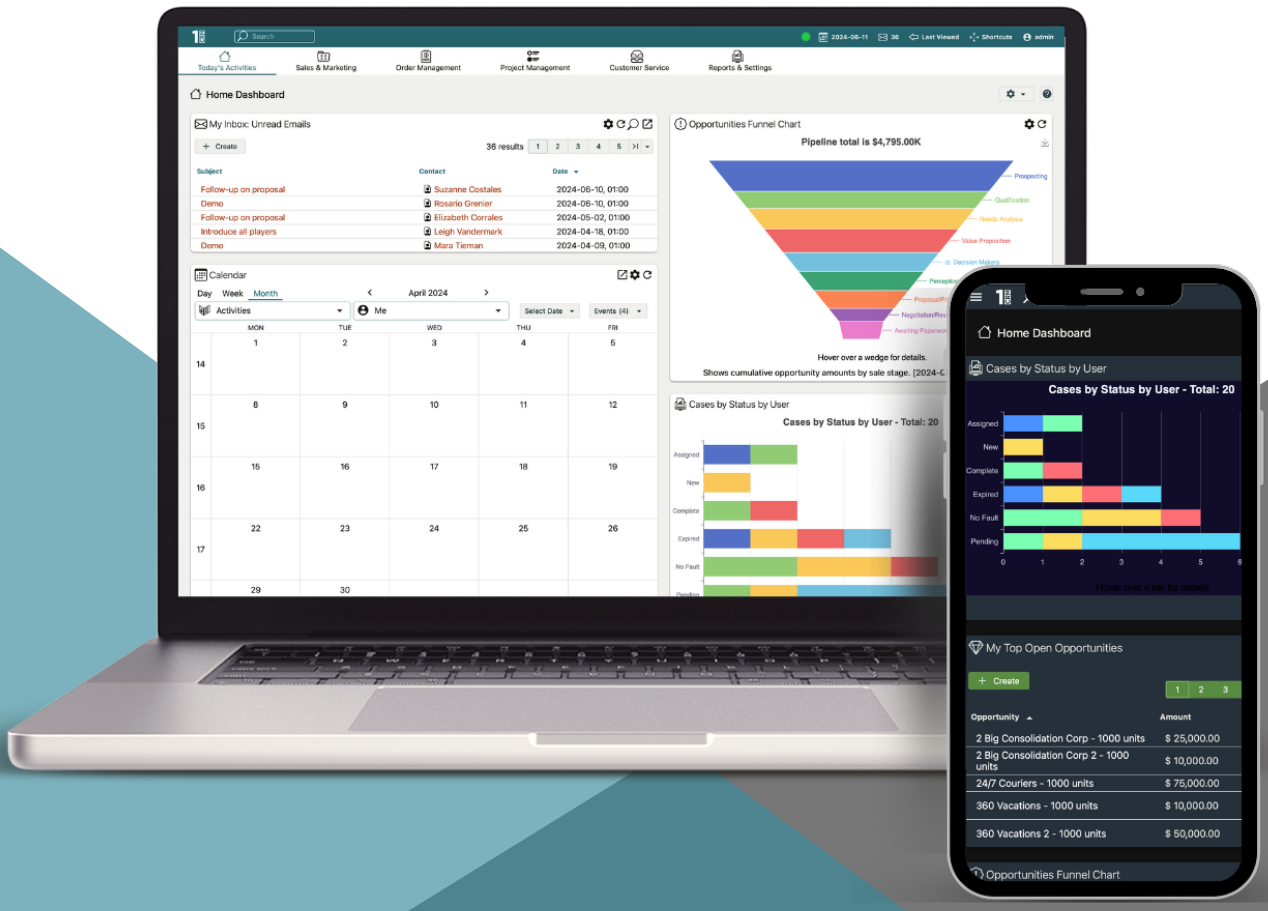
1CRM USER GUIDE

Your Complete Guide to Using 1CRM



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1.0 Welcome 10
1.1 Principal Features 11
1.2 What's New in this Version? 13
1.3 About this Guide 18
1.4 Who Should Read this Guide? 19
1.5 Additional Documentation 19

2.0 1CRM: Getting Started 20
2.1 Before You Begin 20
- 2.1.1 Technical Requirements 20
- 2.1.2 Web Browser and Window Controls 21
- 2.1.3 Log In Information 21

2.2 Accessing 1CRM 21
- 2.2.1 To log in to the System… 22
- 2.2.2 CRMFlex for Android and iOS 22
- 2.2.3 1CRM Client App for iPhone, iPad and Mac 28
- 2.2.4 1CRM Mobile App for Android 29
- 2.2.5 If you cannot log in… 30
- 2.2.6 Security Timeout 30

2.3 Managing Your Password 30
- 2.3.1 To change your password… 30
- 2.3.2 If you forget your password… 30

2.4 Logging Out of the System 31

3.0 An Introduction to CRM 32
3.1 What is a CRM System? 32
3.2 What Does a CRM Look Like? 33
- 3.2.1 Theme Choices and Interface Changes 36
- 3.2.2 Exploring the User Interface 40

3.3 What's in a CRM? 40
3.4 How Do I Operate a CRM? 47
- 3.4.1 Selecting a Module… 47
- 3.4.2 List View Screens and Module-Level Searching 48
- 3.4.3 System-Level Searching 48
- 3.4.4 Smart List Tabs 48
- 3.4.5 Accessibility: Keyboard Shortcuts, Screen Reader 49
- 3.4.6 Detail View Screens and Sub-panels 49
- 3.4.7 The 1CRM Online Guide 52

3.5 CRM Workflow Basics I: Accounts and Contacts 54
- 3.5.1 The Beauty of CRM Navigation 56
- 3.5.2 Main Panel and Sub-Panels 57
- 3.5.3 Edit View Screens 57
- 3.5.4 Linking and Searching/Filtering 64

3.6 CRM Workflow Basics II: Leads and Opportunities 65
3.7 CRM Workflow Basics III: The Sales Pipeline 69
- 3.7.1 The Sales Charts Dashboard 70

3.8 CRM Workflow Basics IV: Calendaring 74

3.9 CRM Workflow Basics V: Sales Activities 76
- 3.9.1 Creating a Note 78
- 3.9.2 Creating a Task 79
- 3.9.3 Scheduling a Call or Meeting, Calling with Skype 79
- 3.9.4 Calling with RingCentral 81
- 3.9.5 Receiving Calls with RingCentral 85
- 3.9.6 Managing Emails 85

4.0 Today's Activities 88

4.1 The Home Dashboard 88
- 4.1.1 Editing Dashboard Info 89
- 4.1.2 Editing the Dashboard Layout 89
- 4.1.3 Dashlet Controls 91
- 4.1.4 Module View Dashlets 92
- 4.1.5 Chart Dashlets 93
- 4.1.6 External Data Dashlets 93
- 4.1.7 Tools Dashlets 97

4.2 The Action Items Dashboard 98

4.3 The Calendar Module 99
- 4.3.1 The Calendar Display and Main Controls 99
- 4.3.2 Calendar Modes 100
- 4.3.3 Calendar Day Layout, and Printing Today's Calendar 103
- 4.3.4 Working With Calendar Items 105
- 4.3.5 All Day Calendar Items 105
- 4.3.6 Public or Private Calendar Information 106
- 4.3.7 Scheduling New Calls and Meetings 106
- 4.3.8 Holidays, and Holiday Packs For Other Regions 109
- 4.3.9 Google Calendar Synchronization 109
- 4.3.10 CRMSync CalDAV Calendar Synchronization 110
- 4.3.11 Calendar Grid Layouts for Scheduling Multi-Person Meetings 111
- 4.3.12 Online Meeting Integration 113
- 4.3.13 Vacations & Sick Days 113
- 4.3.14 Calendar Dashlet 115

4.4 The Meetings Module 116
- 4.4.1 Joining an Online Meeting Session 117

4.5 The Calls Module 118

4.6 The Tasks Module 119

4.7 The Notes Module 121

4.8 The Email Module 122
- 4.8.1 HTML Editor 124
- 4.8.2 Uploading and Using Images in HTML 127
- 4.8.3 Advanced Editing 128

4.9 The Forums Module 129

4.10 The Chats Module 132

5.0 Sales & Marketing 133

5.1 The Accounts Module 133
- 5.1.1 Printing Monthly Statements 134

5.1.2 Emailing Monthly Statements 134
5.1.3 Invoicing for Time Booked to Projects and Cases 135
5.1.4 Re-Assigning Accounts 135
5.1.5 Copying Account Addresses to Related Contacts 136
5.1.6 Creating a New Account 137
5.1.7 Account Popup Messages 138
5.1.8 Display Multiple Accounts on a Map 138
5.2 The Contacts Module 140
5.2.1 Live Business Cards 141
5.2.2 Google Maps Integration 141
5.2.3 Category Mass Update 141
5.2.4 Email Contacts: Ad Hoc Bulk Email 142
5.2.5 Quick Email Campaigns 142
5.2.6 Mail Merge Using RTF Template 144
5.2.7 Export vCards 145
5.3 The Campaigns Module 146
5.3.1 Create Campaign (Classic): An Email Campaign 146
5.3.2 Campaign Wizard: A Newsletter Campaign 152
5.3.3 Testing Your Campaign 156
5.3.4 Running Your Campaign and Tracking Results 156
5.3.5 Creating Web-to-Lead Forms 159
5.3.6 Creating Web Forms with 1CRM WordPress Plugin 161
5.3.7 Advanced Lead Forms Usage 164
5.3.8 Creating Target Lists from List Views 164
5.4 The Leads Module 165
5.4.1 Import Options: Test Run & Custom Mapping 166
5.4.2 Quick Campaign 166
5.4.3 The Convert Button & Smart Convert 167
5.5 The Opportunities Module 168
5.5.1 Revenue Forecast 169
5.6 The Partners Module 171
5.6.1 Partner Access to the Customer Connection Portal 171
5.7 The Marketing Events Module 173
5.8 The Forecasts Module 175
5.8.1 Committing Personal and Team Forecasts 177
5.8.2 Setting Personal Sales Quotas 178
5.8.3 Setting Team Sales Quotas 178
5.9 The Documents Module 179
5.9.1 Drag and Drop Support 180
5.10 The Signing Projects Module 181

6.0 Order Management 183
6.1 The Quotes Module 183
6.1.1 Creating a Quote 184
6.1.2 Grouped Items, Discounts, Taxes, Shipping 184
6.1.3 Line-Item Level Discounts 186
6.1.4 Generating PDFs 187
6.1.5 Business Workflow for the Sales Process 190

6.1.6 Quote Approvals 191
6.1.7 Exchange Rates 191
6.1.8 Tax Rates and Tax Codes 192
6.2 The Sales Orders Module 194
6.2.1 Milestone Billing 198
6.3 The Invoices Module 202
6.3.1 Creating a Credit Note 204
6.3.2 Charging a Credit Card 204
6.3.3 Shipping Products with the Ship It! Button 206
6.3.4 Creating Supported Products from Line Items 206
6.3.5 Creating an Invoice or Statement PDF 206
6.3.6 Applying Incoming Payments 206
6.3.7 Invoicing for Time Booked to Projects and Cases 207
6.3.8 Invoicing Individual Service Cases 209
6.3.9 Invoicing Individual Projects 209
6.3.10 Paying Invoices using PayPal 209
6.3.11 Locking Invoices for Data Integrity 210
6.4 The Credit Notes Module 211
6.4.1 Crediting an Invoice 211
6.4.2 Crediting an Account 213
6.5 The Shipping Module 215
6.6 The Payments Module 218
6.7 The Purchase Orders Module 219
6.7.1 Business Workflow for the Purchasing Process 220
6.8 The Bills Module 223
6.8.1 Applying Outgoing Payments 225
6.9 The Receiving Module 226
6.10 The Product Catalog Module 228
6.10.1 Creating a New Product 229
6.10.2 The eStore Product Catalog & Catalog Sync 231
6.11 The Discounts Module 233
6.12 The Subscriptions Module 234
6.13 The Commissions Module 238
6.14 The Price Books Module 240

7.0 Project Management 242
7.1 The Projects Module 242
7.1.1 Project Gantt Charts 244
7.2 The Human Resources Module 246
7.2.1 HR Documents 247
7.3 The Booked Hours Module 249
7.3.1 Booking Hours from Cases and Project Tasks 250
7.3.2 Booking Hours from Calls, Meetings & Tasks 250
7.4 The Timesheets Module 251
7.5 The Expense Reports Module 255
7.6 The Booking Categories Module 259

8.0 Customer Service 261
8.1 The Service Subcontracts Module 261
8.2 The Supported Products Module 263
8.3 The Recurring Services Module 265
- 8.3.1 Collecting Payment for Recurring Services 266
- 8.3.2 Authorizing a Credit Card 267

8.4 The Cases Module 269
- 8.4.1 Case Queue Workflow 270
- 8.4.2 Cases Notifications 270
- 8.4.3 Booking Time to Cases 271
- 8.4.4 Using Service Parts on a Case 271
- 8.4.5 Invoicing a Case 272
- 8.4.6 Debiting Case Costs to a Subcontract Pre-payment 274
- 8.4.7 Email Interaction on a Case 274

8.5 The Software Bugs Module 276
8.6 The Knowledge Base Module 278

9.0 Reports & Settings 284
9.1 The Reports Module 284
- 9.1.1 Running Standard Reports 285
- 9.1.2 Creating New Reports 286
- 9.1.3 Setting Report Filters 287
- 9.1.4 Defining your Report's Column Layout 288
- 9.1.5 Report Sorting 290
- 9.1.6 Defining your Report's Chart Layout 290
- 9.1.7 Working with Related Sources 291
- 9.1.8 Specialized Reports 291

9.2 The Dashboards Module 294
9.3 The Activity Log Module 296
9.4 The System Bulletins Module 297
9.5 The Data Privacy Module 298

10.0 Your User Profile 299
10.1 My Account 299
- 10.1.1 Header Information 300
- 10.1.2 User Information 300
- 10.1.3 User Settings 301
- 10.1.4 Service Skills 301
- 10.1.5 Submit User Photo 301
- 10.1.6 Locale Settings 301
- 10.1.7 Layout Options 302
- 10.1.8 Theme Options 302
- 10.1.9 Email Options 303
- 10.1.10 Outbound Email Settings 303
- 10.1.11 Monitored Mailboxes 306
- 10.1.12 Phone Calls Settings 307
- 10.1.13 RingCentral Settings 307
- 10.1.14 Google Account Settings 308

10.1.15 Google Calendar Settings 308
10.1.16 Google Drive Settings 308
10.1.17 Google Contacts Settings....308
10.1.18 CRMSync for Contacts (CardDAV Server) 309
10.1.19 CRMSync for Calls, Meetings, Tasks (CalDAV Server) 311
10.1.20 DropBox Integration Settings 314
10.1.21 ConsignO Cloud Integration Settings 314
10.1.22 LiveChat Integration Settings 314
10.1.23 Online Meeting Credentials 314
10.1.24 My Account Settings Screen Images....315
10.2 Directory 320

1.0 Welcome

Thank you for using 1CRM! Release 9.0 of the 1CRM Customer Relationship and Business Management (CRBM) System is designed to further energize your organization's efforts to efficiently organize and maintain information that is crucial to many aspects of your business. 1CRM enables organizations to do business, better.

The 1CRM system is available in four Editions:

- Startup Edition: Free for use On Premise. Request a license key and download link, and you can install Startup Edition on your own server at no charge. It offers all the features of 1CRM Professional Edition, but is limited to 3 Users, 300 Accounts, 750 Leads, 750 Contacts, and 750 Targets. Although it only offers Community support, and no updates, the Startup Edition is a great way for an early stage business to get itself organized and productive while operating on a shoestring budget!
- Startup+ Edition: Similar to the Startup Edition, but for somewhat larger firms, with capacity limits of 10 users, 600 Accounts, 1,500 Contacts, 1,500 Leads and 1,500 Targets. Unlike the Startup Edition, this is a commercial product, available on the 1CRM Cloud or for On Premise software installation.
- Professional Edition: 1CRM Professional is our mainstream small business CRM product offering, available on the 1CRM Cloud or for On Premise software installation. Includes the next generation 1CRM REST API for custom integration capabilities (also required to use the iPhone App).
- Enterprise Edition: Our premium product. It offers all the features of 1CRM Professional Edition, plus a number of additional features of particular interest to larger, more sophisticated businesses. Administrators can use the Module Designer and PDF Form Designer to create more advanced customizations. Price Books let you establish pricing for multiple client levels. The iOS client provides optimized system access from an iPhone. And Advanced Reporting offers more sophisticated reporting capabilities.

Unlike most CRM solutions, 1CRM offers comprehensive Order Management. It includes a Product Catalog, plus the ability to create Quotations, Sales Orders and Invoices using products from the Catalog. Incoming Payments may be received and allocated against invoices, and the system can produce PDF documents for Quotes, Sales Orders, Invoices, Receipts, and Statements. Purchase Orders may also be created, and Outgoing Payments recorded against them.

1CRM also offers extensive features for Project Management, Service Management, and general office administration (including Expense Reports, Timesheets, Vacation scheduling and tracking, and HR).

Most importantly, the 1CRM system seamlessly blends all of these capabilities into an intuitive and friendly interface. The instructions in this guide will introduce you to the most important CRM concepts and help you get familiar with using your 1CRM system.

1.1 Principal Features

The principal features of the 1CRM System are –

Customer Relationship Management:

- Account creation and management, with any number of Contacts associated with each Account;
- Activity history (Meetings, Calls, Tasks, Notes with optional file attachments, and Email) is tracked for Contacts, Accounts, Leads, Opportunities, and Cases;
- Forum threads may be linked to almost any information in the system, and users may register to see when threads are updated; and
- Tasks may be assigned to users, and automatic email notifications may optionally be sent to advise users of new tasks.

Sales Force Automation:

- Summary view on any Dashboard page of upcoming Activities, top Opportunities, open Tasks, Leads, sales pipeline graph, appointment calendar, and a quick contact entry facility;
- Sales Lead creation and tracking, and Conversion of Sales Leads into Opportunities;
- Sales Forecast management, with forecast roll-ups that follow the sales management hierarchy; and
- Graphical Dashboard display of Opportunity Pipeline, Lead Sources, & Outcomes.

Order Management

- A product catalog with pricing, description, etc.. which may be bulk imported from supplier files;
- Product tracking of all products sold and supported on service contracts;
- The ability to prepare customer Quotes, Sales Orders and Invoices from products in the catalog, generate Acrobat PDFs from these Quotes and Invoices, and email them directly to clients from within the system;
- Shipping and Receiving modules support inventory management for one or more warehouses, and track partial shipments against Receiving and Shipment records as well as Sales and Purchase Orders;
- Incoming Payments may be received and allocated to Invoices;
- Receipts for Incoming Payments may be generated as Acrobat PDFs and printed;
- Statements may be generated as Acrobat PDFs to show partial payment of Invoices, as well as to provide statements of complete account status, detailing all open Invoices and any payments applied to them; and
- Purchase Orders may be created, and may be converted into Bills. In turn, Outgoing Payments may be recorded against Bills.

Email

- Inbound and outbound email support;
- Emails may be composed and sent from within the system;
- Users may create personal email folders for filing email;

- All email is automatically associated with related contact and account information – the system builds account and contact history automatically;
- Each user may read mail from one or more POP3 or IMAP mail accounts;
- Group email boxes (such as support@company.com) may be shared between users; and
- Email marketing campaigns are supported, with management of a mass email queue; and
- The email Trash folder is automatically emptied according to rules specified by each user.

Project Management:

- Project creation and management, with income and cost forecasting and tracking vs: actual financial performance;
- Timesheets may be filed with time booked to Project Tasks, and resource costs attributed to projects automatically;
- Resources utilized by projects are tracked, and the business' overall resource utilization may be monitored; and
- Each project links to related Account, Contacts, Notes, Documents, plus Call, Task and Meeting activity history.

Customer Service:

- Service contracts may be defined for accounts, and supported products linked to them. Automatic email reminders are sent when contracts are close to expiry;
- A case management system allows users to track customer problems and resolutions. It allows each problem to have a lifecycle of information to improve customer satisfaction;
- Each case links to related Account, Contacts, Notes, associated files, plus Call and Meeting activity history;
- A Knowledge Base module allows Cases to be converted into Articles in the Knowledge Base, and Articles can be marked for public access via the Portal, or not; and
- A software bug tracking system for managing bugs reported against different revisions of software.

Information Consolidation:

- A News Feed dashlet lets you select and manage your favorite RSS (Really Simple Syndication) news feeds, and display them on any dashboard page.
- A Weather dashlet lets you select up to 10 cities, and see their updated weather info on any dashboard page - such as your Home Dashboard.
- A Stock Quotes dashlet lets you select any number of stock symbols and see their latest trading information.

Document Repository:

- Organizes everything from HR claim forms and Marketing collateral to Engineering design documents, ensuring that only current and approved documents are available. Great for ISO!
- Documents in any format are filed and indexed with a title, description, file type, status, department, keywords, creation & revision dates, owner, and multiple revisions of the document itself.

Corporate Calendar & Directory:

- Personal calendar views (by Day, Week, Month, or Year) of all business activities, with an associated Task list;

- Company calendar views, of all employees, or just selected employees, or those within a specific department;
- Resource calendar views (Day and Week) to check for free meeting rooms, projectors, etc..;
- Project task assignments may be viewed for all staff performing services work, to ensure high utilization;
- Group calendaring capabilities for viewing other user's calendars to avoid scheduling conflicts; and
- Photographic company directory that offers such information as telephone extension, department, email address, mobile phone number, and SMS address.

Security & Permission Management:

- The system may be configured so that all users may see and manipulate all data. Alternatively, permissions may be managed tightly via Roles and Teams, with associated permissions for individual users, or groups. Even the ability to import and export data is controlled.

1CRM is built on established open-source technologies and widely supported industry standards, including the PHP development environment, the MySQL relational database, the Apache web server, and the Linux or Windows Server operating systems. The system supports the LAMP (Linux, Apache, MySQL, PHP) and WAMP (Windows, Apache, MySQL, PHP) platforms, as well as macOS Server and the Microsoft Azure Cloud. See the *1CRM 9.0 Implementation Guide* for recommended versions of these software components.

1.2 What's New in this Version?

With each revision of the 1CRM software, significant advances are made in both the feature set and usability of the software.

1CRM 9 is a very big deal for us here at 1CRM. The largest 1CRM development project undertaken in our 17 year history, it brings an all-new user interface and user experience, based on 1CRM's open-sourced oceanfront GitHub project. Users will appreciate 1CRM 9 for both the modern appearance and the more productive work patterns, with edits performed directly from the detail view or list view. Oceanfront builds on the Vue 3 project (vue-next) and TypeScript to produce a predominantly JavaScript-driven next generation UI which will support highly variable themes to appeal across a wide range of country, culture and age demographics. Oceanfront becomes a key MIT-licensed open source project on which 1CRM depends, just as it depends on many other open source libraries.

While 1CRM 9 will be valued by clients for its modern appearance, enhanced productivity and the flexibility to create different themes as desired, it is an even more significant evolution of 1CRM than it appears. The API sees a massive expansion with a corresponding simplification of the logic layer, and the entire oceanfront-based user presentation layer interacts with the core CRM data via the API. This results in clean interfaces from presentation, to logic, to API, to database – with automated testing designed into all the communications between layers. For the non-technical this just means a more modern software architecture designed for improved system reliability. For the technical audience, they will also enjoy access to the new range of API endpoints.

Some key new features in 1CRM 9.0 Include:

- Theme Designer - Customize the user interface like never before! Choose between iOS and Android experience, or blend them together to create the look and feel you desire.

- Dark Mode - All new dark mode creates a more modern feel to the application.
- Live Sales Stage Editor - Quickly progress your opportunities with a new graphical sales stage editor found in the detail view of any record.
- In-line Editing - Hover over any editable field and click the pencil to unlock, you can quickly edit data and save without the need to open up the full record.

The highlights of release 8.7 of 1CRM include:

- Compatibility with PHP version 8. All our major open source libraries were updated as well, including TC/PDF, phpmailer, SabreDAV, and dozens more. This major set of changes to the 1CRM code base lets 1CRM benefit from the improved performance offered by PHP 8.
- The 1CRM Client app is now available in the macOS and iOS/iPadOS app stores - a universal Apple app for all recent Apple devices. It includes an option for business card scanning.
- Accessibility enhancements to 1CRM include keyboard-only navigation and screen reader support. See section 3.4.5 for details.
- Opportunities may now include specific Revenue Forecast data that details the products and quantities involved in a sales opportunity. This data is used to generate new *Revenue Forecast Tables* and *Product Forecast Tables*. And when the Opportunity is converted to a Quote, the products and quantities from the Revenue Forecast are used to create line items on the Quote automatically.
- Microsoft Teams chat and collaboration platform integration.
- Zoom cloud-based video conferencing service integration.
- Integration with the Zapier service for a wide range of 1CRM data - including Zapier sync with accounting systems such as QuickBooks Online and Xero.
- Integromat integration added. Use Integromat to sync 1CRM data with a wide range of other cloud applications including accounting, project management, calendar and many other types of apps.
- Invoice locking has been enhanced with more rigorous controls on the deletion, cancellation and/or editing of Invoices (see section 6.3.11).
- Support for salesforce.com data import, to support migration to 1CRM.

The highlights of release 8.6 of 1CRM include:

- Support for the new WordPress Portal: *1CRM Customer Connection*.
- A new *Subscriptions* module is added, allowing 1CRM to manage your client subscriptions for monthly or annual services. (Customer subscription self-management is available in the Customer Connection Portal.) This includes an integration with the Chargebee billing system.
- *Milestone Billing* feature allows you to easily collect initial deposits and intermediate milestone payments while delivering on an order – then generate the final milestone invoice with a single click.
- A new *User Tracking* solution has been added, with reports showing the time users spend in the system, and the number of records viewed or edited.
- A new *Commissions* module is adde d, allowing 1CRM to calculate and report on sales commissions based on percentages of gross profit or total sales. Aggregate commissions on a sale may be split across multiple sales staff.
- The *Knowledge Base* module is substantially updated, adding knowledge base categories, and obsoleting the use of Tags. (Customers can search the Knowledge Base in the Customer Connection Portal using full text searches, and browsing by Categories.)

- Integration with the WordPress plugin Booking Calendar, to support booking personal services (such as Spa, Physio, or Massage appointments), Airbnb type reservations, and technician home visits such as plumbers and appliance repairs. Contact, Account, appointment and billing information is synced into 1CRM by the Customer Connection portal.
- A new *Storage Utilization* screen is added, showing available or allocated storage, free space, and usage categories. Notifications may be sent for low free space, and regular storage utilization reports can be generated automatically.
- For Developers: The 1CRM REST API capabilities have been extended, and the Developer Guide content expanded to cover Webhooks.
- Major open source libraries are updated, including TC/PDF and SabreDAV.
- Google Maps integration significantly upgraded, including the ability to display multiple selected Accounts, Leads or Contacts on a common map, with identifying pop-up data displayed for each.
- WooCommerce integration added for Enterprise edition.
- A PayPal button may now be added to Invoice PDFs you send to clients, allowing them to pay using a credit card. (Enterprise Edition only, as it requires the PDF Form Designer)
- Two factor authentication added for 1CRM login, supporting popular 2FA phone apps such as Microsoft Authenticator and Google Authenticator.
- Full text search added for Notes.

Release 8.5 of 1CRM is fairly easy to notice, as it makes major changes to the user interface!

- The Flex theme is added, and the Long Reach theme is retired. The Flex theme features a strong flat design and a wide range of colour and background image options.
- The Claro theme now offers several selectable colour options, so now all four themes offer a choice of colours: Spectrum, Delight, Flex and Claro.
- All themes receive a make-over with new fonts, new icons, new field widgets, new touches everywhere. The list view filters and mass update panel have been updated, as well as the pagination controls.
- All the administration screens have been redesigned with a much more modern look.
- *CRMFlex:* Most importantly, all screens are now responsive - meaning they dynamically react to the width of the browser window in use. On a desktop or laptop computer you can see this dynamic re-formatting for yourself. Just bring up any 1CRM screen (detail view, list view or dashboard) and then drag the right edge of the browser window so it becomes wider or narrower - and watch what happens! This CRMFlex adaptive user interface ensures an excellent browser experience regardless of the size of the device you use to access 1CRM: Phone, Tablet or Laptop/Desktop.
- Data Privacy module added, tracking data privacy events such as Right to Erase Information, Consent to Process, and Withdrawal of Consent. New Access Control features added as well as several other changes to assist our clients in compliance to European GDPR (General Data Protection Regulations), and similar data privacy requirements worldwide.
- System performance has been greatly accelerated by asynchronous resource loading techniques which minimize full page loads.
- *Drag ‘n Drop Support* is now available, for adding files to 1CRM as Notes with attachments, and as Documents, in essentially all modules. Drag ‘n Drop support is available for adding attachments to emails as well.
- You can now manage the creation, re-ordering and deletion of tabs on all module detail views. The Layout editor adds support to move standard or custom fields to any tab desired.
- A new Activity module has been added: *Chats*. An integration with *LiveChat* has also been added, allowing live website chats to be logged within 1CRM. These are linked within the

History sub-panel to existing Leads or Contacts, or they can create a new Lead as well. And inside the LiveChat system, operators benefit from enhanced information on website visitors when they are recognized as existing Leads or Contacts within 1CRM.

- The integration with the Lead Guerrilla Marketing Automation system has been enhanced, allowing both 1CRM Leads and Contacts to sync with Lead Guerrilla at the same time. This enables Lead Guerrilla to perform lead nurturing and deliver leads with lead scores and a detailed history into 1CRM. At the same time you can automatically stay in touch with existing clients in 1CRM using Lead Guerrilla campaigns targeted at their specific interests.
- Track email opening for individually sent emails (Campaign emails were already tracked). Show how many times opened, and from what locations. When *Sent Email Tracking* is enabled, two fields are added to the Email detail view - *First Opened* and *Open Count*. Also, a subpanel will be added to the Email detail view, to display the history of email opens.
- *PieSync* Integration has been added. This facilitates seamless 2-way contact sync between 1CRM and many of your favourite cloud apps. Popular syncs include MailChimp, FreshBooks, Shopify, Pardot, Marketo and others.
- *Developers:* An API client library for 1CRM has been added to GitHub https://github.com/1CRM/1crm-api-client-php to assist advanced integration projects using the 1CRM API. See documentation for the API client here: http://1crm.github.io/1crm-api-client-php/index.html
- An editor for System Notification messages has been added.

The highlights of release 8.0 of 1CRM include:

- 1CRM Mobile iOS App: Release 1.3 – Filter and Sort controls for all list views; Notifications for Calls, Meetings and Tasks; Support for displaying and filtering by Favourites. See Apple App Store for history of releases 1.0, 1.1, and 1.2 earlier this year.
- Support for PHP 7.x, and its significant performance gains (typically 25-33%).
- Major re-imagining of 1CRM Workflow system, adding power and flexibility system-wide.
- Major upgrade to 1CRM Notifications system. Every system notification and invitation email template is now more attractive, informative and based on a responsive design, with many containing new links and controls for the recipients.
- Integration with Lead Guerrilla Marketing Automation System. Enterprise Marketing Automation at a Small Business price.
- Advanced all-new self-documenting REST API (existing APIs will also remain in place) designed in conjunction with 3rd party app developers and our own Mobile client development, to promote easier development of 1CRM integrations, and faster performance. See more details in the Developer Guide.
- The Studio now allows four new types of Custom Field to be created:
  - *Related Record*. These Related Record fields link to records in other modules.
  - *Value from Related Record*. Custom fields which can show fields from any record related to the current record.
  - *Item Number*. Shown in a Courier-like font suitable for part numbers.
  - *Status*. For fields to be displayed as a status badge, not as text.
- PDF Form Designer can now reference fields in related modules, greatly increasing the scope of customizations available for 1CRM-generated PDFs.
- Mailboxes configured with the ability to auto-create Service Cases may now also auto-create Contacts. These new Contacts will be linked automatically to the received Email record as well as to the Service Case.
- Support for OAuth authentication, private clients, and registry of 3rd-party public clients.
- Enhanced security for CRMSync with DAV-specific password.

- Dynamic password strength indicator now displayed when setting passwords.
- Multiple login errors now lockout user accounts for progressively longer periods.
- Each user now has a mandatory password change at their initial login.
- New Login screen design, with *Forgot your Password?* feature.
- Master Service Contracts have been eliminated and the Service Subcontracts module now replaces it, with Subcontracts linked directly to Accounts.

The key features of release 7.8 of 1CRM are:

- User preferences for reordering of Smart List Tabs, selecting a default list view for each module, and hiding Smart List Tabs.
- Drag and drop plus user preferences for reordering of detail view subpanels, as well as the ability to hide subpanels.
- Customer Satisfaction Rating & Surveys when customer service case is closed.
- Configurable auto-closing of pending customer service cases.
- Quick Setup option for user email setup, supporting Outlook, GMail/Google Apps, Yahoo, AOL and iCloud email accounts.
- Integration with the Stripe payment processing system. 1CRM accounts may now have a credit card registered to them, generating a Stripe ID for that Account.
- Recurring Services module can now automatically process payments via Stripe for each invoice generated.
- Integration with the RIngCentral™ cloud-based business phone service.
- Automated Call timer for professionals with billable Calls.
- Ability to book and bill hours spent on Calls, Meetings, Tasks
- Studio: Fields can be shown/hidden dependent on the value of a controlling Dropdown field, using the Custom Fields Editor, or the Module Designer for standard fields. Dropdown options offered to users can also be limited.
- Smart Convert feature copies data for matching custom fields when records are converted, such as a Quote to an Invoice, or a Lead to a Contact.

The key features of release 7.7 of 1CRM are:

- CRMSync™ – syncs Contacts and Calendar info bi-directionally with iOS (iPad, iPhone), macOS, Android and Outlook. This feature provides handy access on your phone or tablet to view, edit and add contacts and appointments while online or offline.
- New Claro theme – a modern, open and simple theme for 1CRM. Small and simple header at the top of the screen, plus simplified screen layouts with more white space.
- PDF Form Designer (*Enterprise Edition only*) enhanced, including support for landscape format PDFs.
- Accounts, Contacts, Leads and Users have an image field for a photo, logo or other image.
- New *In-Place image editor* now used to edit all images in the system, such as your company logo, clients photos, etc ..
- Updated screen layouts – Record views now include a clean and visual summary panel at the top, with company logos, client pictures, quick icons to create related new emails, tasks, calls and meetings, plus record owner and team info.
- Unified detail/edit views – Data is now always in the same spot on both detail and edit views. When customizing screen layouts, now only customize the unified view, not Edit and then Detail view separately.

- Enhanced performance: 1CRM is faster than ever!

The highlights of release 7.5 of 1CRM include:

- GoToMeeting integration (a popular web video conferencing service)
- *iOS Client*: An iPhone App you can use to access your 1CRM system (***Note:*** Enterprise Edition only)
- *PDF Form Designer*: Let's you create custom layouts for the PDFs 1CRM generates for Invoices, Quotes, Sales & Purchase Orders, Statements, Expense Reports, Timesheets and Service Work Orders. (***Note:*** Enterprise Edition only)
- In addition to the existing SkypeOut calling to normal phone numbers, 1CRM now adds Skype calling to Skype ID (i.e. free Skype-to-Skype call) for Users, Contacts and Leads. Hover on Skype ID links in 1CRM to choose Chat, Call or Video Call.
- *Advanced Reporting*: Includes support for multiple series of data (***Note:*** Enterprise Edition only)
- A new System Bulletins module is used to post news messages about system upgrades, planned outages, or any other news items that concern the CRM system. These messages will be shown as a popup to selected users after their next login.
- *Price Books*: Define multiple price books, and assign a default price book to each client. Now you can cater to a mix of retail and distribution clients, or smaller vs. larger clients, with a convenient price book for each pricing channel or level. (***Note:*** Enterprise Edition only)
- *Module Designer* was formerly an optional feature for 1CRM Professional - now it is a standard feature of 1CRM Enterprise Edition
- Activities may now be related directly to Accounts, as well as having a variable relationship to other modules
- Data validation added for email addresses
- Product catalog import enhanced to add *Update catalog* mode
- New option to download system updates and then apply them as one continuous process, in addition to the usual method where downloading and applying them are two separate steps.
- Added the ability to import emails from an external email system's Sent email folder then add those emails to the 1CRM user's Sent email folder, enabling 1CRM to track emails sent from other email clients
- Added ability to report on stock in multiple warehouses individually, in addition to overall total (achieved by supporting reporting values and totals on columns from SQL join tables)
- Added

button on Report detail view, to show actual report SQL query.

1.3 About this Guide

This guide is current with the details of operation for 1CRM System 9.0. It is designed for users who are new to 1CRM, or the areas of customer relationship management, project management, and web-based applications in general.

The information in this guide describes how to use a Mac, PC or mobile device and a web browser to access 1CRM in order to perform a broad range of corporate information management tasks. Readers are not required to have any programming or software development knowledge, but should be generally familiar with the use of a personal computer, and Internet browser software such as Safari, Google Chrome, Microsoft Edge or Mozilla Firefox.

1.4 Who Should Read this Guide?

This *1CRM User Guide* provides information for conventional system users who wish to record and track company activities and outcomes.

This guide is not intended for system administration personnel who need to install and configure the system as part of its initial implementation, or for ongoing system management. That information is provided in a separate document - the *1CRM Implementation Guide*.

1.5 Additional Documentation

The 1CRM Customer Relationship and Business Management (CRBM) system offers extensive documentation for the installation and use of its various components. Click on any link below to download that document, or click here to see all our 1CRM documentation:

- User Guide
- Mobile User Guide
- Implementation Guide
- Developer Guide

2.0 1CRM: Getting Started

2.1 Before You Begin

This guide assumes that the resources you need to access the system are available and that you are familiar with how to use them. If you are not sure whether your system meets the requirements or how to use required third-party tools (primarily a web browser), talk to your manager or system administrator.

2.1.1 Technical Requirements

Before you begin using the system, ensure that you have the appropriate software installed and configured on your system. All you will need is –

- **A current web browser running on your computer.**

  1CRM has been tested with and supports a variety of browsers. The following browsers are acceptable for use with 1CRM:

  - Chrome version 61 and later - www.google.com/chrome/
  - Safari version 12 and later - www.apple.com/safari/
  - Firefox version 67 and later - www.mozilla.org/firefox
  - Default browser on recent iPad, iPhone, or Android devices

  You will encounter problems if you try to access 1CRM using older or unsupported web browsers. If you are unsure about which web browser version you are using, click *Help* > *About…* or similar options on the menu bar in your browser. The version number will be displayed.

  Both JavaScript and cookies support must be enabled in the security settings of your browser and is usually turned on by default.

  If you encounter problems accessing the system, check your browser configuration to ensure both JavaScript support and cookies support are enabled. (See *Tools* > *Options* > *Privacy* and *Web Features* tabs in Firefox.)

- **Alternatively, a current web browser running on your mobile device.**

  1CRM has been tested with and supports a variety of mobile devices. iPhones and iPads with iOS 12 or later will work well, as will most phones and tablets running Android 9 (Pie) or later. Other mobile devices using webkit-based browsers will likely function as well.

- **Network access to a server that is running the 1CRM software.**

  Your system or network administrator will be able to provide you with an Internet address (URL) from which the system can be accessed.

2.1.2 Web Browser and Window Controls

1CRM dynamically creates the HTML screens displayed by the web browser when you click certain buttons.

Using **'back'** and **'forward'** buttons can cause problems displaying these dynamically generated pages. For this reason, we do not recommend using these controls on your browser when operating 1CRM.

1CRM is designed for a minimum 1024x768-pixel screen display resolution when used on laptops and desktop computers, with a 1280x768 or greater screen size preferred. But it will automatically reconfigure the screen layout for smaller screens on smartphones and tablet computers.

2.1.3 Log In Information

If you do not provide the correct user name and password, 1CRM will not allow you access to the system.

Your system administrator assigns log in information – a user name and password – to every system user. If you have not received your user name and password combination, contact your system administrator.

2.2 Accessing 1CRM

To access 1CRM, type the URL into your web browser's address bar. You should see a screen similar to the one shown below:

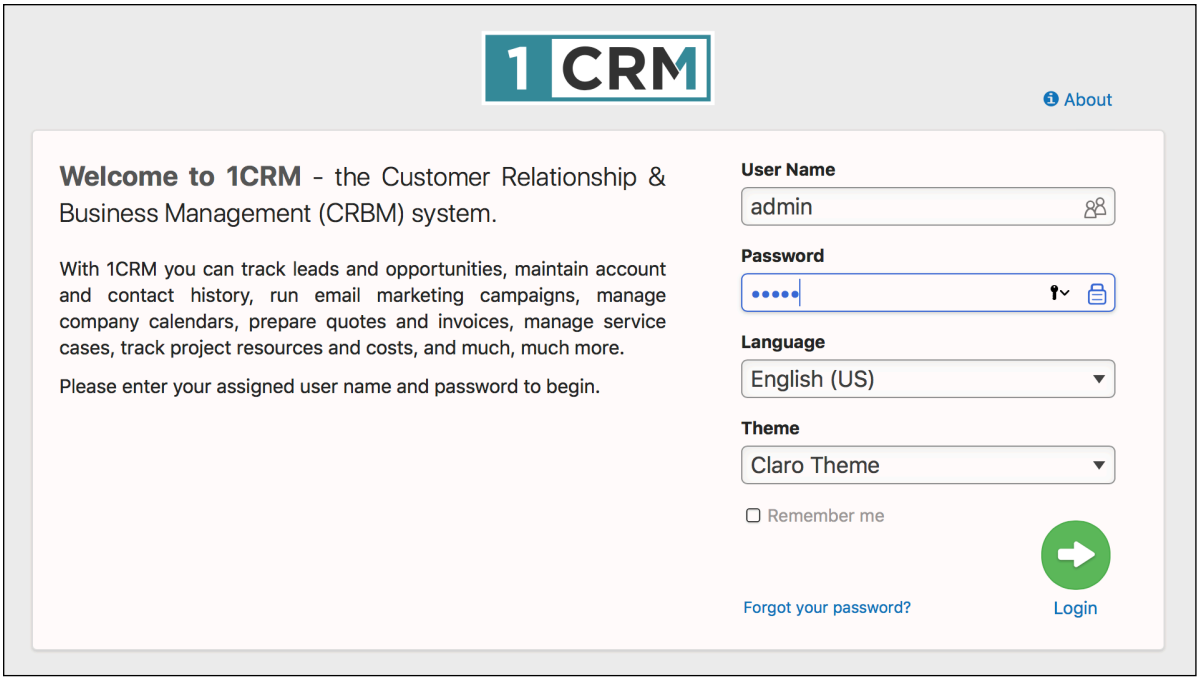


Figure 1: The 1CRM Login Screen

This is the 1CRM log in screen. If you do not see a log in screen, verify that you have entered the URL correctly. If you did not make a typing mistake, contact your system administrator to verify that you have the correct URL. To proceed, you must log in to the system by providing a valid user name and password.

You may also choose the language (US English, Français (French), Español (Spanish), Italiano (Italian) and Deutsch (German) and/or others may be available on your particular system) that you want to use with the system, and the 'theme' or visual appearance you want the system to have.

2.2.1 To log in to the System…

In the 1CRM log in screen –

1. Type your user name in the User Name box.
2. Type your password in the Password box. (***Note:*** System passwords are case-sensitive.)
3. Select the language and theme that you want to use. (Note that your theme choice can also be changed at any time, using a dropdown control in the footer of each screen in 1CRM.)
4. Click the Login button.
5. If you have Two-Factor Authentication Enabled, you will see a screen to enter your 6-digit 2FA code. Get that from your preferred smartphone app, then click on *Verify*.

Note: After three failed login attempts, login access for that username is suspended for 5 minutes. Following that, the next failure (without a successful login) causes a 20 minute timeout, then 45 minutes, and increasing. If an Admin updates your password, the suspension is lifted.

2.2.2 CRMFlex for Android and iOS

Anywhere, any device, any time. That has to be the mantra in today's business world for how you respond to your clients' needs. Accordingly, 1CRM is designed as much for use on smartphones and tablets as it is for laptop and desktop computers. Now as you will see in later sections, free apps are available for 1CRM on Android, and for iPhone, iPad and Mac devices from Apple. But you can also just use 1CRM from the browser on smaller devices, and the system will adapt to the screen size. The ability of 1CRM to adapt its screen presentation to best suit the screen size of the device you are using is called *CRMFlex*. (In computer terminology, 1CRM is *responsive*.)

To take advantage of CRMFlex simply enter the normal URL for your 1CRM system in the address bar of your smartphone or tablet browser, and login using your usual username and password. Let's have a quick look at the same 1CRM screen, as seen in the browser of different devices:

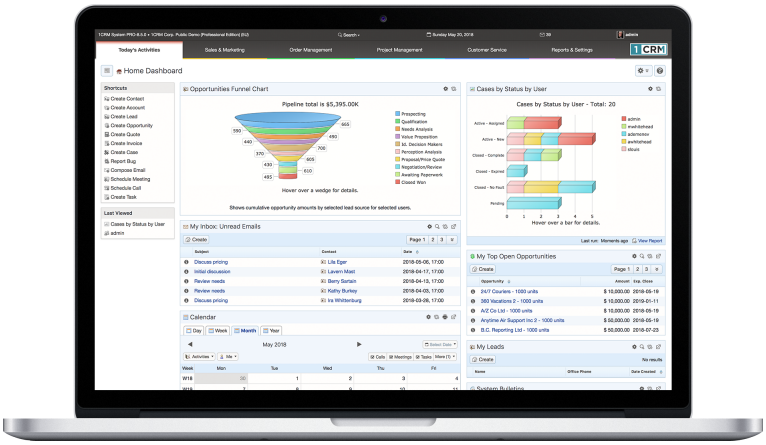


Figure 2: MacBook Pro 13" (Chrome)

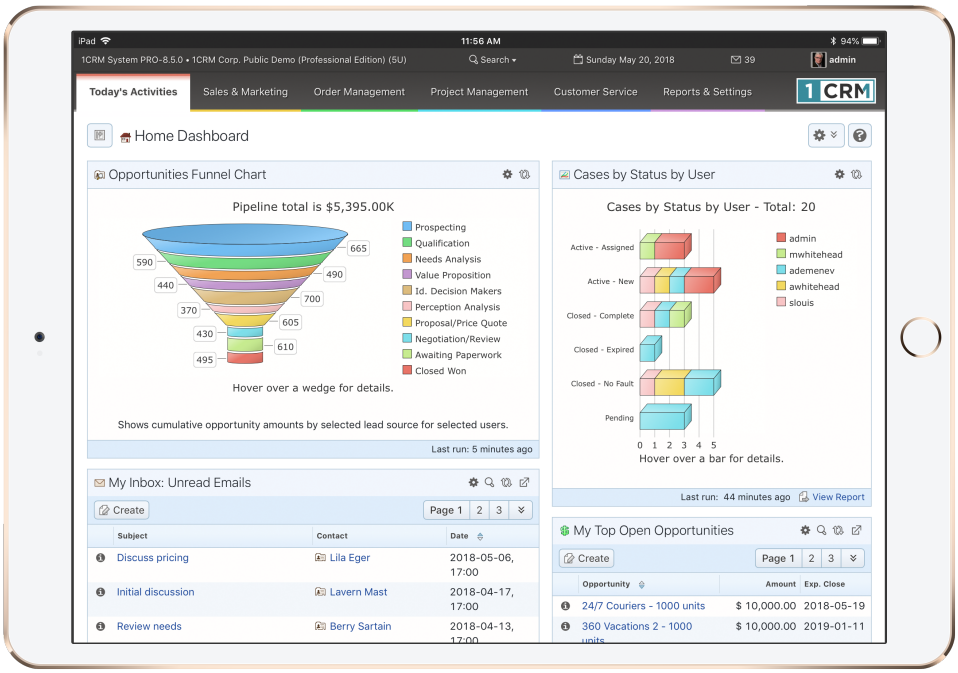


Figure 3 : iPad Pro 10.5” landscape mode (Firefox)

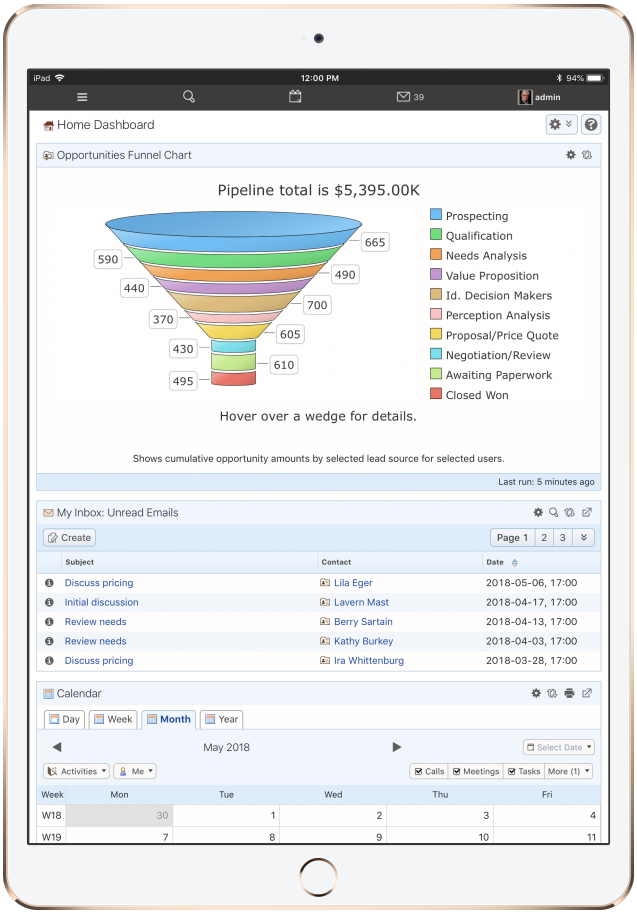


Figure 4: iPad Pro 10.5” Portrait mode (Firefox)

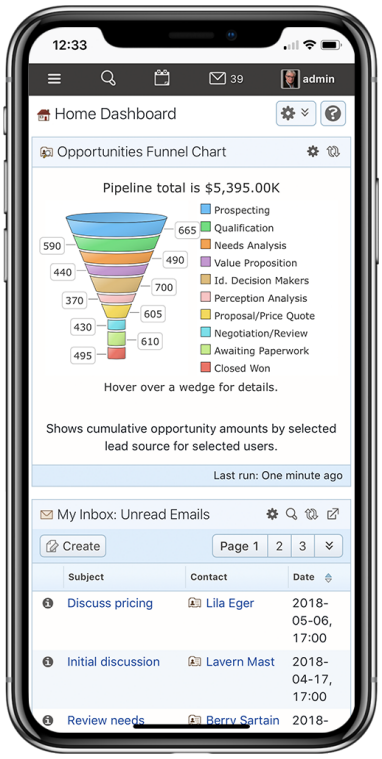


Figure 5: iPhone X (Firefox)

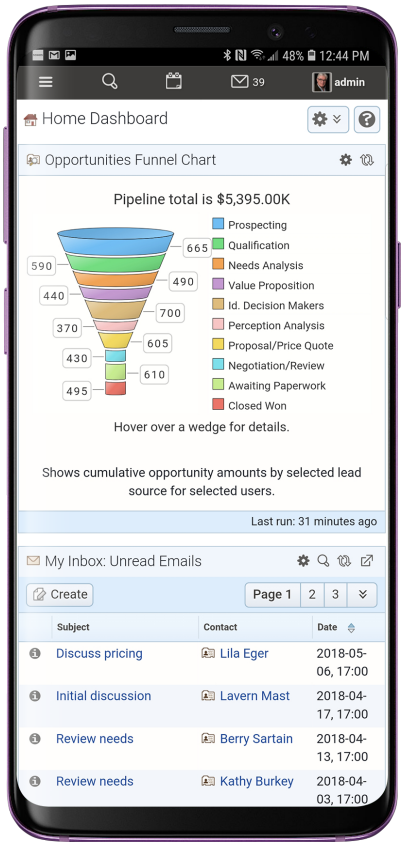


Figure 6: Samsing Galaxy S9+ (Chrome)

What we notice is that while clearly we see different amounts of data on each device, the way data is presented and the way the system is navigated is very similar across all devices. This way you don't have to learn all new techniques to use 1CRM on different devices.

Some of the key points you should know include:

Smartphone Layout Mode

- CRMFlex shifts to Smartphone Layout mode when the width of your browser screen is typical for a smartphone. We recommend you use a smartphone with at least a 4.7" screen, such as an iPhone 6/7/8, to ensure the best experience.
- Claro theme is used, regardless of the theme you have selected. Your selected theme will be used on other devices.
- The complete 1CRM system is available to you: all modules plus administration. Even modules that you might expect to require larger screens, such as Quotes and Invoices, have been adapted for elegant smartphone operation.
- The menu system is now condensed, and accessed via a *hamburger* style icon ☰ on the left end of the top bar.
- The sidebar that contains shortcuts and last viewed items is not shown.
- Shortcuts are available when you tap the menu icon ☰. (See Figure 8)
- Last viewed items are available when you tap on Search. (See Figure 9)
- Dashboards all adopt a single column layout.
- When you click on phone numbers within 1CRM, you can choose if dialling will use the phone in your smartphone, or an app corresponding to your system's chosen IP Telephony service (Skype or RingCentral).
- On both Android smartphones and iPhones you can add an icon for 1CRM to the home screen of your device, so that you access 1CRM just as you would any smartphone app.

Tablet Layout Mode

- CRMFlex shifts to Tablet Layout mode when the width of your browser screen is typical for a tablet.
- If you are using a tablet device in landscape mode to access 1CRM, such as an iPad, iPad Pro or iPad mini, you will usually (depending on tablet size) see the normal full 1CRM menu bar interface as shown in Figure 3. Dashboards will not be forced to single column mode. The sidebar is collapsed by default, but as usual it may be expanded by the button found near the left edge of the screen.
- With a tablet in portrait mode you will usually see the smartphone type condensed menu bar as shown in Figure 4. Dashboards will adopt a single column layout, and the sidebar that contains shortcuts and last viewed items is not shown.
- We recommend an iPad Air, Pro or Mini with LTE support as a very compact mobile device with which to use 1CRM. Or just link to your phone for an Internet connection using Apple's *Personal Hotspot* feature.
- Your selected theme will be used: Claro theme is not enforced.

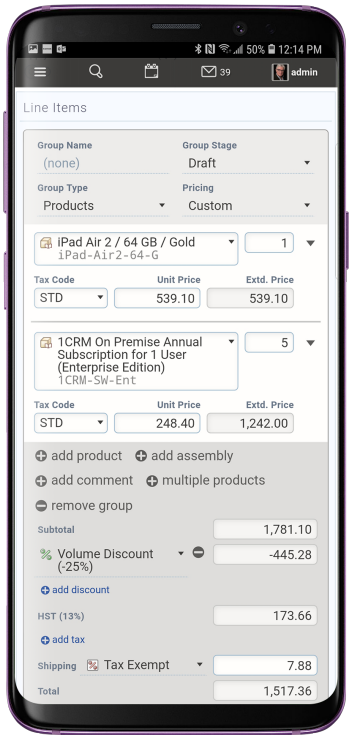


Figure 7: Preparing a Quote in Smartphone Layout Mode (Galaxy S9+)

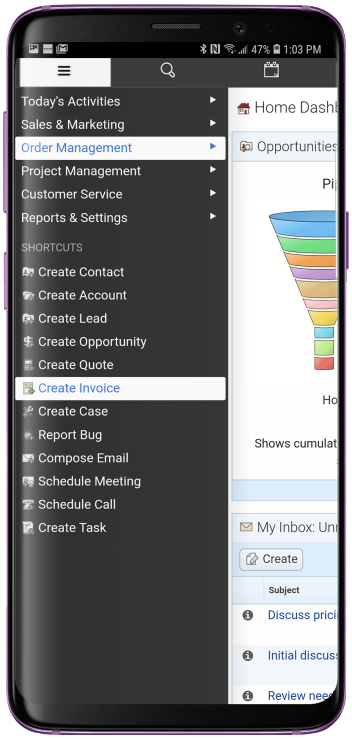


Figure 8: Smartphone Menu & Shortcuts (Galaxy S9+)

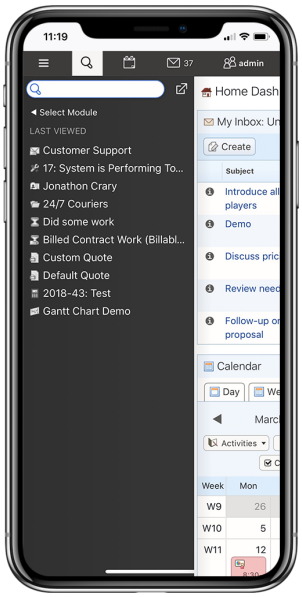


Figure 9: Smartphone Search & Last Viewed (on iPhone X)

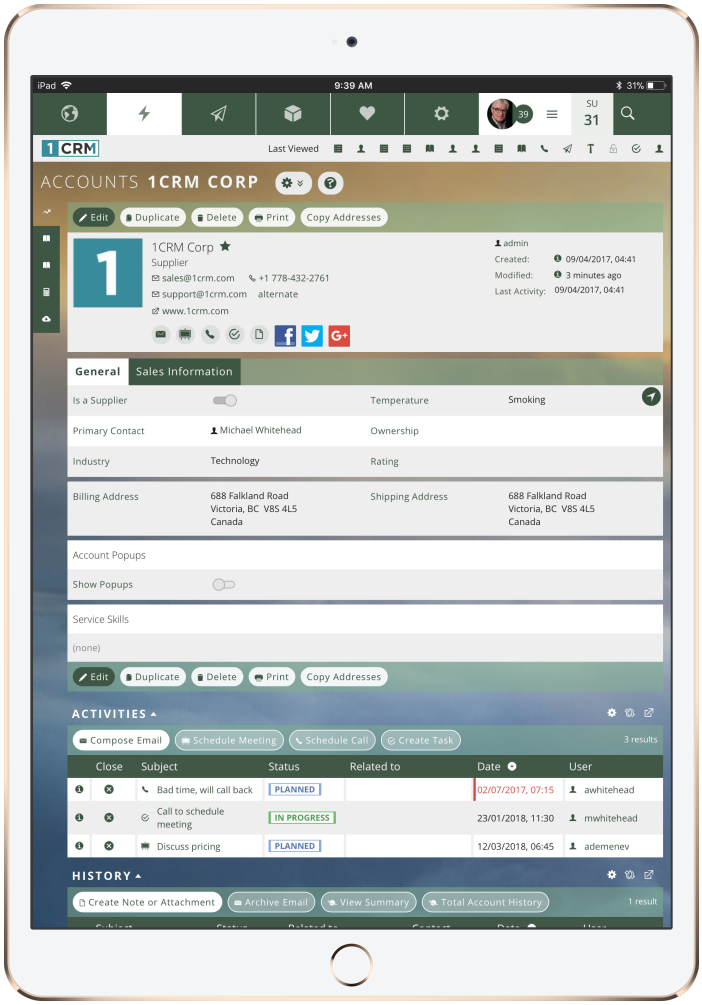


Figure 10: CRMFLex (Flex Theme, Black Forest Scheme) on iPad Pro 10.5”

2.2.3 1CRM Client App for iPhone, iPad and Mac

There is a free 1CRM Client App available in the Apple App Stores for iPhone, iPad and the Mac. It works with any of the 1CRM Editions - from Startup to Enterprise, and any recent version of 1CRM. For more information, see the 1CRM Mobile User Guide.

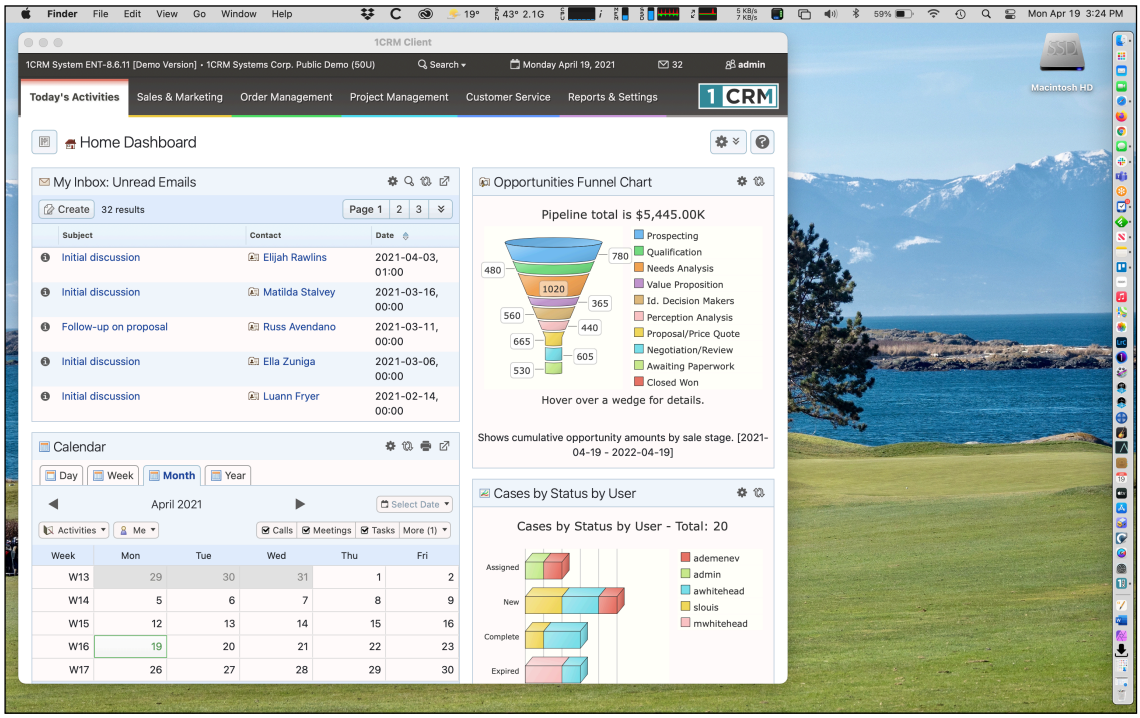


Figure 11: 1CRM Client App on Mac

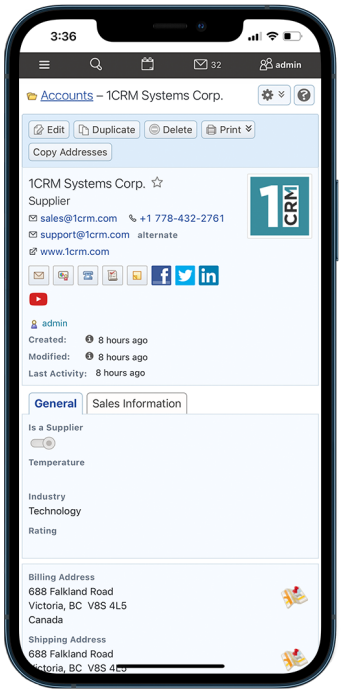


Figure 12: 1CRM Client App on iPhone 12 Pro Max

2.2.4 1CRM Mobile App for Android

There is a free Android App available in the Google Play Store, as shown in Figures 13 and 14. It works with all 1CRM Editions. For more information, see the 1CRM Mobile User Guide.

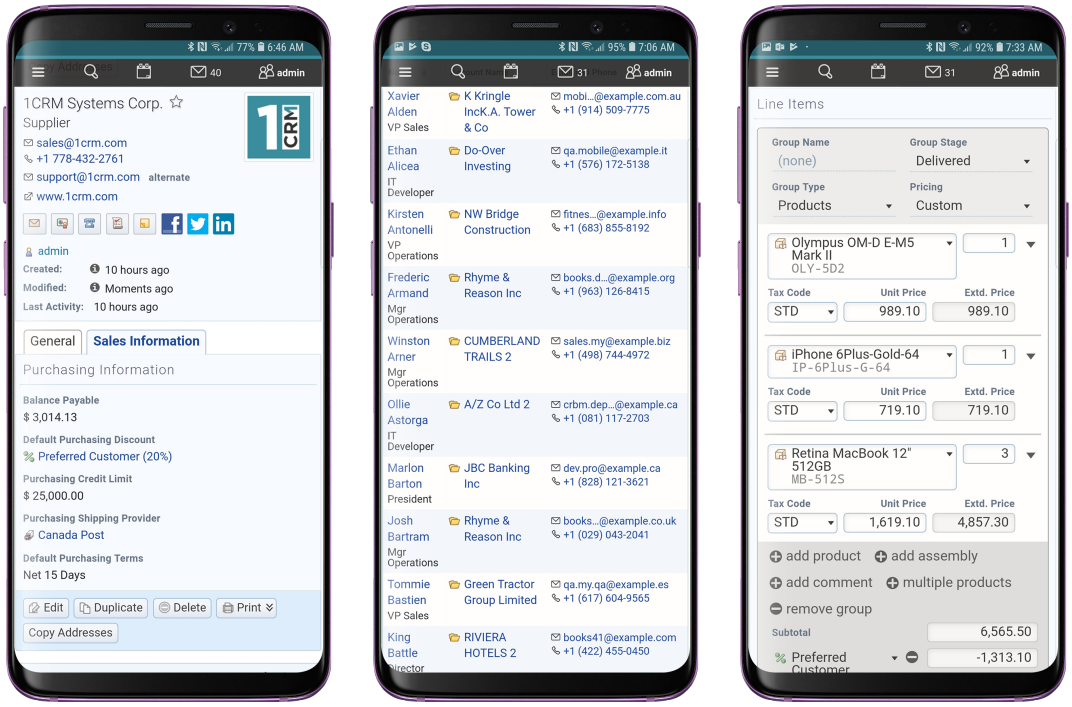


Figure 13: 1CRM Mobile for Android - Sample Screens

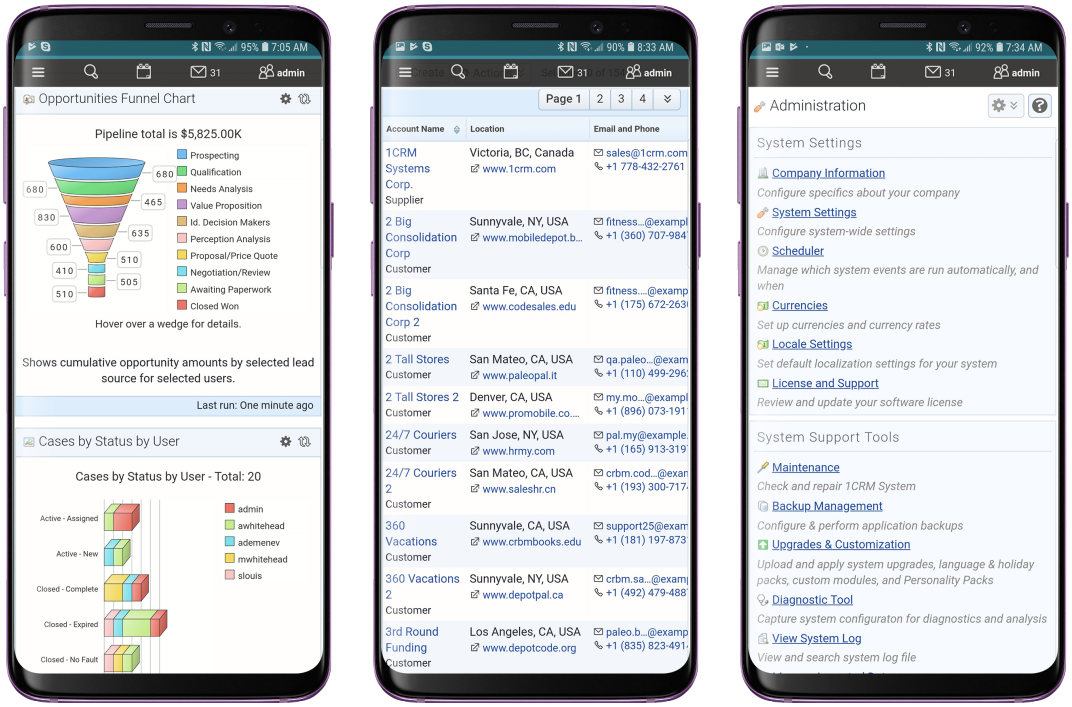


Figure 14: 1CRM Mobile for Android - Sample Screens

2.2.5 If you cannot log in…

- Verify that your username and password were entered correctly, including any capital letters.
- Contact your system administrator to verify that you have the correct username and password combination.
- Your account may have been disabled. Contact your system administrator.

2.2.6 Security Timeout

For security reasons, the system will automatically log you out of the system if you do not perform any tasks for a period of time. By default, the system will not log you out until 30 minutes have elapsed without any activity. (This feature can be turned off, or the time period changed, via configuration parameters set by your Administrator.)

When you are ready to resume working with the system, click any button on the screen. The system will automatically load the log in page for you. You can also close all web browser windows and re-load the log in page manually.

2.3 Managing Your Password

When you are first given access to the system, your administrator will provide you with a password. For security reasons, you should change this password to another one that only you know. Ensure that you choose a password that is easy for you to remember, but difficult for another person to guess.

You can change your password at any time. It is a good idea to change your password occasionally.

2.3.1 To change your password…

1. Click the My Account link *(see highlighted item 5, on Figures 15-18 below)*.
2. On the My Account screen click on the Change Password button.
3. In the Change Password dialog box which appears, type your new password in the New Password box, and again in the Confirm Password box.

   Note: Passwords must be at least 6 characters long, and contain at least one numeric. A dynamic password strength indicator will show you the quality of your password.
4. Click the Save button.

2.3.2 If you forget your password…

If you forget your password, you must contact your system administrator, who will reset it to a value that you can use temporarily. You should then log in to the system, and change the password to a value of your own choosing, according to the procedure described above.

2.4 Logging Out of the System

When you are finished working with the system, you should always log out of the system rather than just closing your web browser.

When a user logs out, the system performs several 'clean-up' procedures, and then automatically returns the web browser window to the Login screen.

To log out…

1. Click the Logout link in the User Management area *(see item 5, Figures 15-18 for various themes)*, in the top right hand area of the screen for most themes.
2. If desired, you may now close the browser window.

3.0 An Introduction to CRM

3.1 What is a CRM System?

At 1CRM Systems we view 1CRM as a CRBM - a Customer Relationship and *Business* Management system. By this we mean a CRM which has extensive business management capabilities integrated within it - such as order management, project management, service management, and HR management. But before we go on to address these extended CRBM capabilities, let's first get you comfortable with some CRM basics.

If you are going to implement a CRM system, it is probably important that we first go over what a CRM system really is, and how it compares to some tools you may already be familiar with. A CRM System is just that – a system which *Manages* information and processes around your *Relationship* with your *Customers*. The sales aspect of that relationship, yes – but also the ongoing service and support aspects. The system should provide at least basic information about the companies you are doing business with, and the people you work with at those companies. Typically these are referred to as Accounts, and Contacts. Accounts can be your customers, but may also be your suppliers, your partners, and your sub-contractors.

You are likely familiar with one or more simple contact management systems – such as Microsoft Outlook, ACT!, or Goldmine. Let's talk a bit about Microsoft Outlook, as the one most people have seen and used. While it is used mostly as an email client, Outlook is also a contact manager. It keeps track of the people you know – often both personal and business contacts in one system. It lists for each person their phone number(s), email address(es), mailing address(es), and personal information such as birthday, and anniversary. It also records the organization they work for, as one of the data fields on their record. If you have a second person you know, who also works at that company, Outlook has functions that let you copy the first person's information, so as not to have to re-enter all the company-related information.

Unfortunately, if that company moves, or changes its fax number, that information is duplicated on the contact record for everyone you know at that company, and you will have to chase them all down individually to correct them.

By contrast, one of the minimum features offered by a CRM is that the company, or Account, has information kept on it as an independent entity, and then has people you know, or Contacts, linked to it. In this way, the company information only gets changed in one place when it needs updating, and yet each Contact record easily brings up the information of the Account with which it is associated.

In Microsoft Outlook, as well, there is no attempt to automatically link upcoming meetings, telephone calls, or tasks with the Contact or Account to which these activities relate, or to keep an organized history of past Account activity including emails and notes. Essentially any CRM can do this.

These (Account records separate from Contact records, and the maintaining of Account and Contact history) are two of the fundamental features you should expect to see in any CRM, but there are many more, including:

- Salesforce automation – including lead capture, and the promotion of leads to Accounts/ Contacts, and Opportunities;
- Opportunity tracking with sales stage and percentage likelihood;
- Sales pipeline tracking, with graphical charts that offer drill-down from the bar or segment of the chart to the data that underlies it;

- Definition of sales teams and territories, to manage information sharing, and track sales performance by territory;
- Lead source analysis of sales and opportunities;
- Flexible reporting, to extract precisely the information you want to see;
- Service case tracking, and other service/support capabilities such as tracking software bugs, and managing support subcontract renewals;
- Corporate calendar management, for arranging meetings;
- Corporate directory, for contacting fellow employees;
- Interface consolidation, bringing into the CRM environment additional everyday needs in order to make a company information resource that employees can 'live in' – including news feeds, stock quotes, weather forecasts, integration of external web links and applications, and integrated web-based email; and
- Document management and revision control, for managing and retaining reference copies of important corporate documents.

A well-conceived CRM must also have a truly outstanding user interface, as the whole raison d'être for the system is to make the organization's information accessible quickly, easily, and naturally. As the CRM software field has matured, many CRM systems have come to adopt similar solutions to navigating through the CRM. Let's have a look at what it is like to use a CRM with a state of the art user interface, by having our first look at 1CRM.

3.2 What Does a CRM Look Like?

In the figures below, you see the 1CRM Home Dashboard. It is the first thing you will see (after the login screen) once you start using the system. Various key elements of the screen layout are highlighted on Figures 15-18, as follows:

1. Navigation Tabs: Click to choose desired module
2. Navigation Shortcuts Box: Specific shortcuts useful within each module
3. Last Viewed: A remarkably handy trail of recent records you have viewed
4. Search Box: Search for a text string within all data held by 1CRM
5. User Management Links (Admin link is only available to users marked as administrators)
6. License Information: Shows the licensee name and user count, and links to the License Information screen
7. Calendar Information: Shows today's date, and links to Calendar Day, Week or Month views
8. Mail Information: Shows the number of unread emails, and offers links to go to the Inbox, and to check for new emails
9. Main Screen Body: On the Home Dashboard, the information presented is comprised of small frames of information called dashlets. Some of the dashlets available include your Calendar, Weather, News Feeds, Stock Quotes, plus dashlets for any module and any chart in the system. Users can choose what dashlets they want on their screen, and how they are arranged.

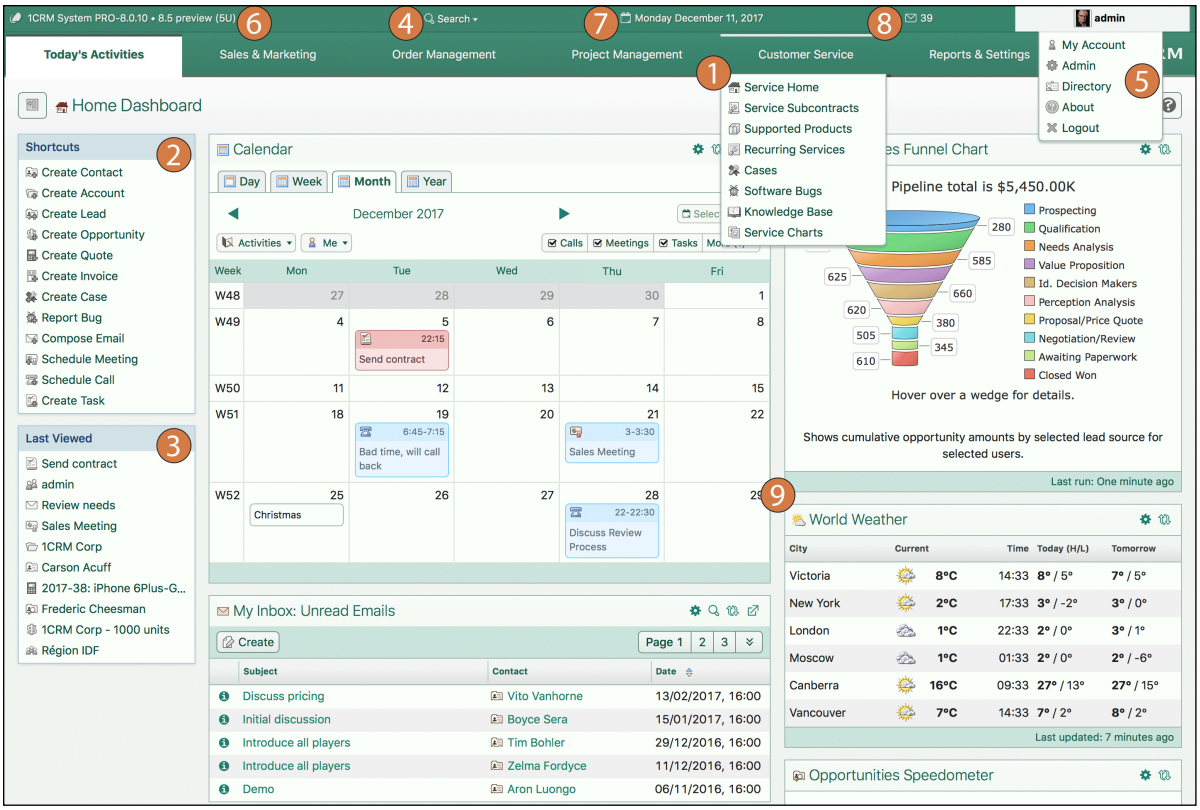


Figure 15: The Home Dashboard (Claro Theme - Lead Green)

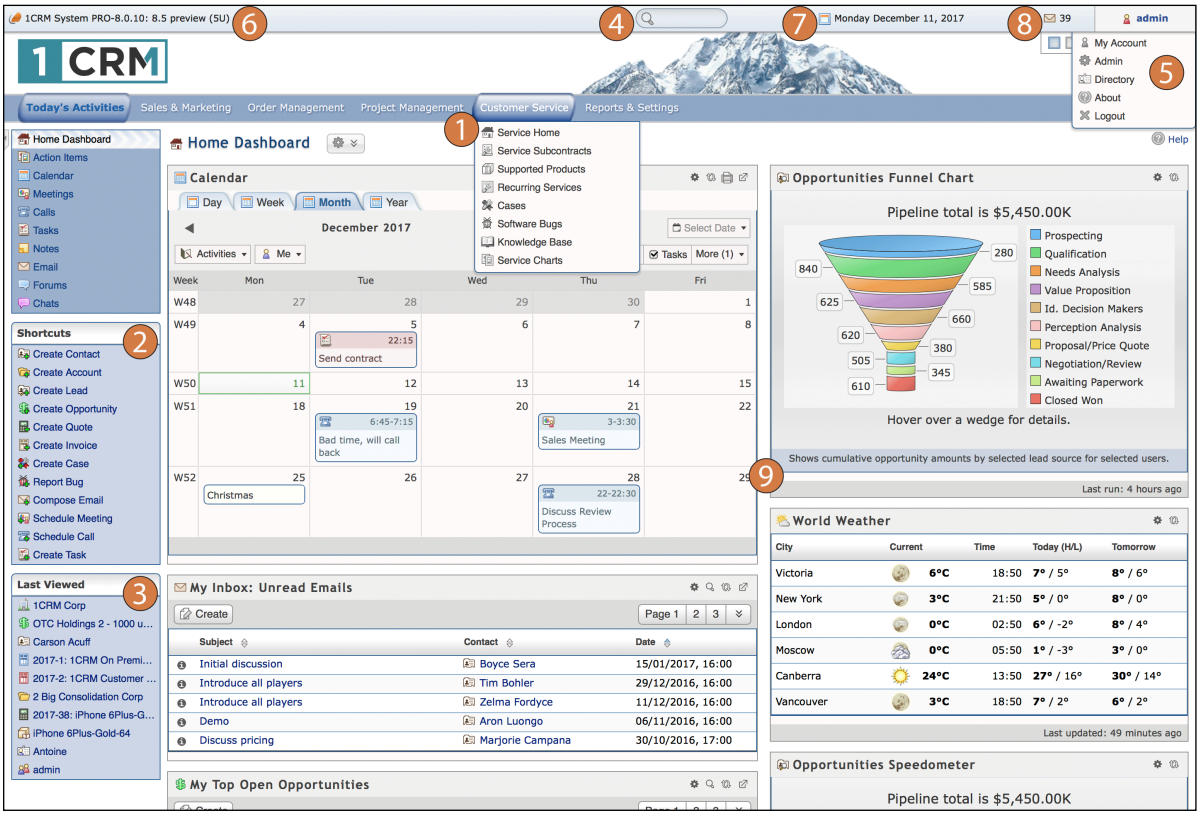


Figure 16: The Home Dashboard (Delight Theme - Blue Ice)

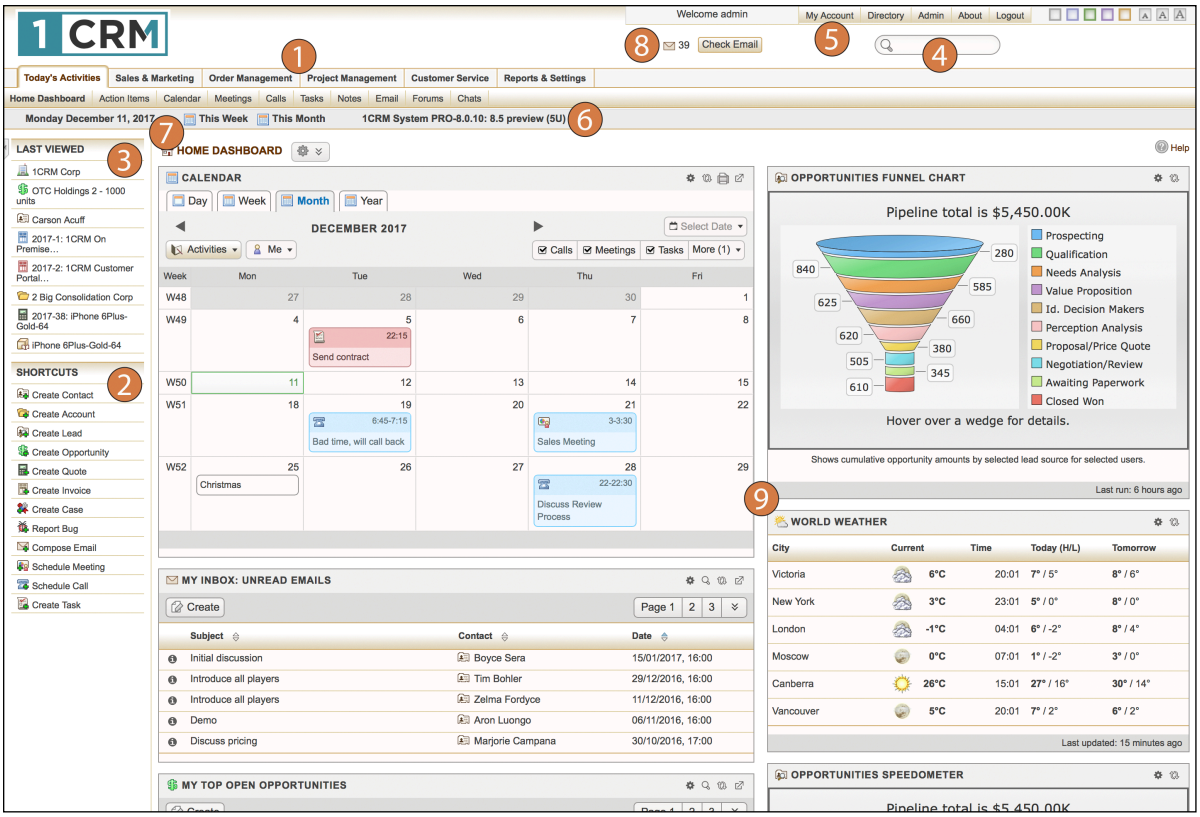


Figure 17: The Home Dashboard (Spectrum Theme - Gold)

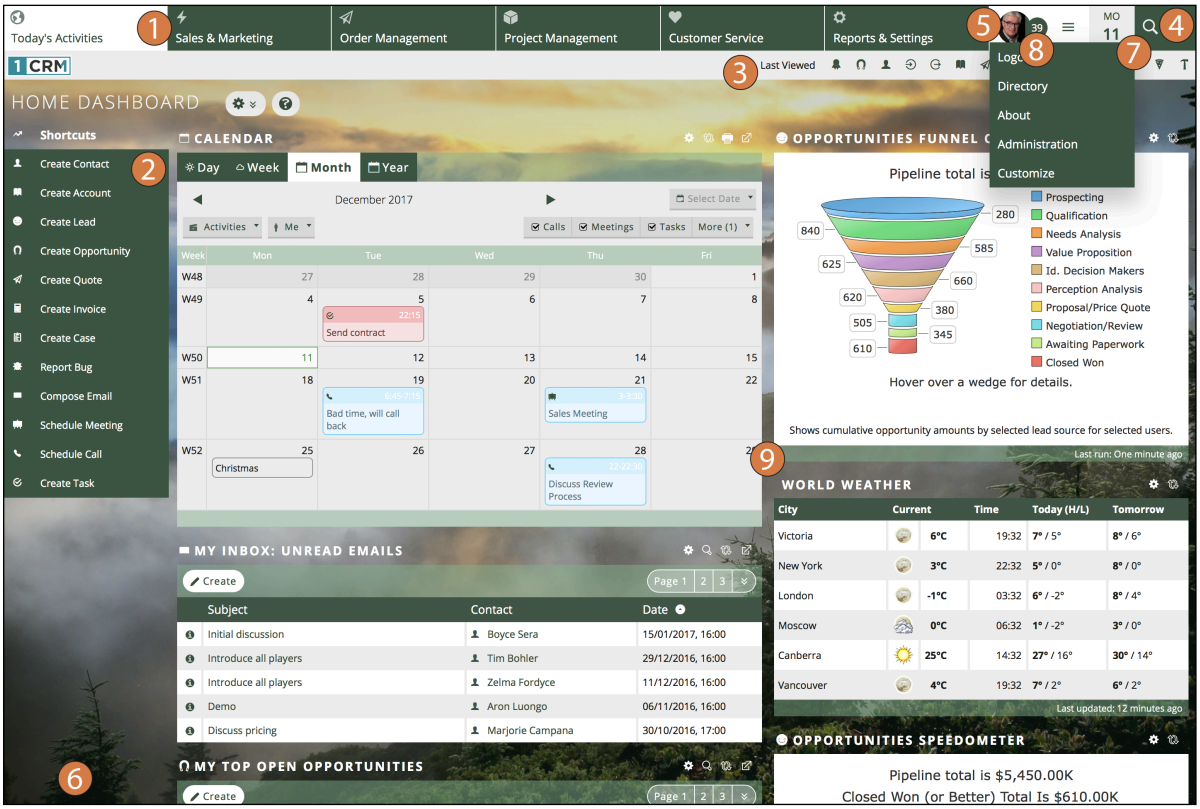


Figure 18: The Home Dashboard (Flex Theme - Black Forest)

Figures 15-18 above show the same information, and offer the same user interface controls, but in different ways. The differences are controlled by what are called *Themes*. You can choose which theme you want to use as you login, using the dropdown control on the login screen. Or you can change it at any time, using a dropdown control at the bottom of the screen.

We have used the Home Dashboard screen as an example to explain the various elements of the 1CRM screen layout. That screen layout uses the same general layout as all of the other tabs. What you will see as you move to other tabs is that the Shortcuts (2) change according to what would be useful within the specific tab, and the Main Screen Body (9) displays the information indicated by the tab name.

One special user interface feature of note is a small Collapse arrow on the top left corner of the Shortcuts box (or an icon to the left of the module name in the Claro theme). Clicking on this control allows you to collapse to the left the Shortcuts box, giving the Main Screen Body more screen real estate to work with. In this collapsed state, moving the cursor over the small remaining Restore arrow will provide access to the two functions – displaying them superimposed on the Main Screen Body. Clicking on the Restore arrow (or in Claro, clicking the icon again) brings the shortcuts box back into the screen layout.

Note: When using some themes, it is the tab or module list that is collapsed to the side, not the Shortcuts box. The Collapsed (or not) status of each user's interface is retained between sessions, and you may prefer to operate the system permanently in the collapsed state. On smaller screens you may find that the side panel collapses automatically to make more room for the main panels.

3.2.1 Theme Choices and Interface Changes

1CRM is supplied with four themes: *Claro*, *Delight*, *Spectrum* and *Flex*. Throughout this guide most illustrations use the Claro theme or the Flex theme.

The Delight, and Spectrum themes support an important layout option in 1CRM, offering a choice of navigational paradigms - *Grouped Modules* or just *Modules*. The Modules paradigm simply means that all the modules in the system are listed linearly - whether it is across the top of the screen, or down the left side, depending on the theme. The Grouped Modules paradigm means that modules are grouped according to functional business areas, such as *Sales & Marketing*, *Customer Service*, or *Order Management*. This creates in effect a two-level menu system - first the user selects a Group such as Sales & Marketing, and then they select a Module from the set of modules within the Group such as Accounts or Contacts.

Note: The Claro and Flex themes only support *Grouped Modules* navigation.

Claro Theme

The Claro theme (see Figure 15 above) is one of 1CRM's most modern themes, with a clean and simple design plus a focus on more white space, modern font design and high resolution icons. It also offers a choice of colours or background image with controls in the footer. To set a background image for your theme, enter a full web address to an image file such as in the example shown for the Flex theme below, then click on *Save.* Use *Remove* to clear your background image.

A key aspect of using the Claro (and Delight) themes compared to the other themes is that a lot of the user controls are on a menu bar at the top edge of the browser window.

- License Info: Clicking on it goes right to the License Information screen within Admin if you have administrator rights, or to the About page if not.
- Search Box: Click on the search box to enter text to search for.
- Calendar Info: Clicking on this goes to Calendar Day. Hovering over it shows the links to go to Calendar Week and Month views.

- Mail Info: Clicking on this goes to the Inbox. Hovering over it shows links to Inbox and to Compose or Check Email.
- User Management Links: Clicking on this goes to your My Account page. Hovering over it shows you options for Admin (if you have administrator rights), My Account, Directory and Logout.

The Claro theme shows group or section names across the top of the 1CRM screen, with the secondary menu of modules in a dropdown from the group name. These dropdowns may be used to navigate directly to a selected module at any time. As well, a ✚ icon to the right of most modules enables the user to quickly navigate to the create new item screen for that module at any time. Try it now - you'll like it!

A special feature unique to the Claro theme is that on Detail and Edit views, the top element of the sidebar is an expandable List view. You can set the default length of the list in *Admin - System Settings*. If you select an item on a List view to open in the Detail view, any filters in effect on the List view will also be in effect in the expandable list view in the sidebar, allowing you to browse through the filtered List view items using a two-panel interface.

Delight Theme

This theme (see Figure 16 above) offers the following theme controls in the top right of the screen:

- Colour Choice (four colour buttons, which also change the tab style, and top image)
- Texture (this button toggles texturing on and off)
- Font Size (three font size buttons)

Some of the other key features of the Delight theme are:

- Support for navigation via the *Grouped Modules* or *Modules* paradigms (an option found in My Account, under Layout Options)
- Support for *Shortcuts on top* (an option found in My Account, under Layout Options)
- Support for *Last Viewed on side* (an option found in My Account, under Layout Options)
- The License Information, Search Box, Calendar Information, Mail Information and User Management links are in a menu bar at the top of the browser window, and stay there despite any scrolling of the screen

The Delight theme shows group or section names across the top of the 1CRM screen, with the secondary menu of modules listed down the left side, and also in a dropdown from the group name. Like Claro, a feature of these dropdowns is that they may be used to navigate directly to a selected module at any time. Delight also offers the ✚ icon to the right of most modules, enabling the user to quickly navigate to the create new item screen for that module at any time.

Spectrum Theme

This theme (see Figure 17 above) offers the following theme controls in the top right of the screen:

- Colour Choice (five colour buttons)
- Font Size (three font size buttons)

Some of the other key features of the Spectrum theme are:

- Support for navigation via the *Grouped Modules* or *Modules* paradigms (an option found in My Account, under Layout Options)
- Support for *Shortcuts on top* (an option found in My Account, under Layout Options)

- Support for *Last Viewed on side* (an option found in My Account, under Layout Options)

The Spectrum theme shows group or section names across the top of the 1CRM screen, with the secondary menu of modules listed on a line underneath them. Using your mouse cursor, just hover over the menu group names to see the associated modules below.

The Spectrum theme (and most of the other themes) offer the following user controls near the top of the screen.

- License Info: Clicking on it goes right to the License Information screen within Admin if you have administrator rights, or to the About page if not.
- Search Box: Click in the search box to enter text to search for. Click on the magnifying glass icon to select what modules are to be searched.
- Calendar Info: Click on today's date to go to Calendar Day. Click on Week and Month links to go to Calendar Week and Month views.
- Mail Info: Click on the mail envelope icon or count of unread emails to go to the Inbox, or click on the Check Email link.
- User Management Links: Separate links are shown top right for My Account, Directory, Admin (if you have administrator rights) and Logout.

Flex Theme

This dramatically modern theme (see Figure 18 above) offers the following controls in the top right portion of the screen, in order from left to right:

- *My Account* link - shown as a vignette of the user's photo - marked with callout 5
- Mail Info - marked with callout 8: displays your unopened email count, and links to the Inbox
- *User Management* links - the ☰ control is used to open and close the dropdown shown, which offers these links: *Logout*, *Directory*, *About*, *Administration*, and *Customize*.

Note: *License information* (Callout 6) is shown in the page footer, unlike the other themes.

The Flex theme shows group or section names across the top of the 1CRM screen, with the secondary menu of modules listed across a few lines underneath them. Using your cursor, just hover over a menu group name to see the associated modules below.

The Flex theme is particularly notable for its range of customization. Click on the *Customize* link to see Figure 19 below:

- To set a background image for your theme, enter a full web address to an image file such as in the example shown, then click on *Save.* Use *Remove* to clear your background image.
- Click on any of the 12 colour schemes on offer. Some have default background images and some do not.

  Note: Each theme offers the option to click in the top part of its box, by the name, or in the bottom part of the box containing a contrast icon. You will notice subtle differences between the two that may better suit custom images.
- Once you select a colour scheme the customization popup disappears, and your new colour scheme is applied to the current 1CRM screen.

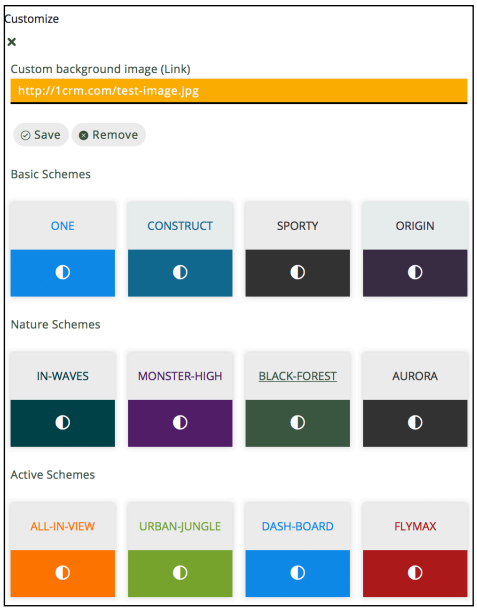


Figure 19: Flex Theme Customization

OceanVue

From version 9.0 1CRM has a new User Interface that introduces a whole new experience when interacting with 1CRM. To access this application you can either add /app to your base URL, for example my-company.1crmcloud.com/app or by clicking the 'New UI' toggle by hovering over the username presented in the top right hand side of the legacy UI.

OceanVue is more than a new UI, it is a whole application that sits on top of the 1CRM application, built in Vue.js and Typescript, powered by out open-source User Interface library, OceanFront. Inside of OceanVue the user is able to access additional features over the old interface, for more information on what is coming see the Software Roadmap page on 1crm.com. The key features available inside OceanVue as of first release are:

- **In-Line Editing** - Hover over a field either in List or Edit View to display a 'Pencil' icon, this will allow you to unlock the row of fields (List View) or the individual field (Detail View) depending on the context. Click the 'Tick' icon to confirm the changes, or the 'Cross' icon to reject the changes.
- **Graphical Sales Stage Editor** - Inside the Opportunities module detail view you will see a graphical sales stage component, these stages are linked directly to the sales_stages set inside the administration panel and will adjust with the order the stages are set. Clicking Closed Won or Lost will enforce a dialog box to appear with additional options.
- **Redesigned Charts** - By using the latest Apache e-Charts library the user has access to more modern looking chart designs. Over time we will look to implement more options for charts.
- **Dark Mode** - Using the drop-down menu found by hovering over your username in the top right hand side of the UI, you are able to activate Dark Mode. This will invert some of the colours of the UI for a more modern and comfortable display whilst working at night. You can also go to My Account —> Display Options —> Theme Options for more settings for your experience.
- **Theme Designer** - The theme designer is a brand new concept to 1CRM, this gives the user the power to pick between different colours, field settings, densities and background images. You can navigate to this by hovering over your username in the top right corner and selecting Theme Designer.

3.2.2 Exploring the User Interface

Using the Claro or Flex theme, scan across the menu system and the User Management Links, to get an idea of all the capabilities packaged together in this system. There are many of them, grouped into the functional areas shown on the top level of the menu system - *Today's Activities*, *Sales & Marketing*, *Order Management*, *Project Management*, *Customer Service*, *Reports & Settings*.

Each menu group on the top level of the menu system has a list of menu functions (or modules) on the lower level of the menu.

For more information on the 1CRM user interface, we recommend you review the relevant videos in the 1CRM Video Channel.

3.3 What's in a CRM?

So – here we are – 1CRM!

Let's get a little more familiar with using the system. First, (and we will assume you are using the Claro or Flex theme from now on) try clicking on a few of the menu tabs – such as *Accounts* or *Contacts* within the *Sales & Marketing* menu group. The module (basically, different sets of information are organized within different modules, and each module has a tab you click on to use it) screens are displayed within your browser very promptly after you click on them – 1CRM is nice and fast! And your server and browser both cache (remember) certain portions of the screen displays for each module, so each screen gets even faster after the first time or two you access it.

1CRM 9.0 contains the following 63 modules, organized by these menu groups:

- Today's Activities (11)
  - Home Dashboard
  - Action Items
  - Calendar
  - Meetings
  - Calls
  - Tasks
  - Notes
  - Email (and Email Templates)
  - Forums
  - Chats
- Sales & Marketing (11)
  - Accounts
  - Contacts
  - Campaigns (and Targets, Target Lists)
  - Leads
  - Opportunities
  - Partners
  - Marketing Events
  - Forecasts
  - Documents

- Order Management (19)
  - Quotes
  - Sales Orders
  - Invoices
  - Credit Notes
  - Shipping
  - Payments
  - Purchase Orders
  - Bills
  - Receiving
  - Product Catalog
  - Discounts
  - Subscriptions (and Plans, Addons, Options, Coupons and Customer Levels)
  - Commissions
  - Price Books

- Project Management (7)
  - Projects (and Project Tasks)
  - Human Resources
  - Booked Hours
  - Timesheets
  - Expense Reports
  - Booking Categories

- Customer Service (9)
  - Service Contracts
  - Supported Products
  - Recurring Services
  - Cases
  - Software Bugs (and Products, Releases)
  - Knowledge Base (and Topics)

- Reports & Settings (6)
  - Reports
  - Dashboards
  - Activity Log
  - System Bulletins
  - Data Privacy
  - Administration (optionally, for those with administrator rights)

Note: You will see a number of other menu options in several of the menu groups - such as *Sales Home*, or *Sales Charts*. These are additional Dashboard pages which will be discussed later on in the Dashboards section. Their display in flat menus like those used in the Spectrum or Delight themes when set for the *Modules* navigation paradigm (not *Grouped Modules*) may be enabled or disabled using a checkbox (*Act as Flat Tab*) on their entry in the Dashboards module. When using a flat menu system, the Home Dashboard has a *Select Dashboard* button at the top to view any dashboard page you choose.

The System Administrator can control which users will be able to see and use which modules, so many users will not actually see all the modules listed above.

From the Home Dashboard where the system 'wakes up', you can access any Module with which you want to work, by clicking on the tab that bears its name. Modules help you work more efficiently by grouping the tools and functions you need to perform specific tasks.

Note: Not every module in the system has a tab, such as modules most often used in relation to another module, for example *Email Templates*, *Targets*, or *Project Tasks*.

Here is a quick overview of the most important modules contained in 1CRM:

1. **Home Dashboard**

   The Dashboards module in *Reports & Settings* allows you to create any number of Dashboard pages. By default, 1CRM creates two at the beginning of the Today's Activities group - *Home Dashboard* and *Action Items*, and two more (one at the start and one at the end) in each of the other tab groups except *Reports & Settings*. Although any Dashboard page can contain any selected mix of dashlets and charts, this page, as the first page you will see when logging into 1CRM, initially contains your Calendar, the NotePad, Stock Prices and Weather dashlets, plus other items of general interest. The *Home Dashboard* also includes shortcuts to enter most sorts of data.

2. **Action Items**

   Although any Dashboard page can contain any selected mix of dashlets and charts, this page initially contains your Email Inbox, plus dashlets for My Calls, My Meetings, My Open Tasks, and Updated Forum threads. Action Items also includes shortcuts to enter most sorts of data.

3. **Calendar**

   View your (and optionally your colleagues') calendar-based activities (by day, week, month or year), including *Meetings*, *Tasks*, *Calls*, *Project Tasks* and *Events*. Schedule new Calls or Meetings, check colleagues' availability, schedule recurring meetings, and view a resource calendar (by day or week) to check for free meeting rooms etc.. Being able to share your calendar with your co-workers is a powerful tool for co-ordinating your daily activities.

4. **Meetings, Calls, Tasks, Notes**

   Together with Emails, these four modules comprise what are called *Activities* in 1CRM. They offer the ability to create or update scheduled activities, or to search for existing activities. By managing Activities within the context of an Account, Contact, Lead, Opportunity, or Case, the true value of 1CRM comes to light. 1CRM allows you to manage the myriad of calls, meetings, notes, emails and tasks that you need to track in order to get your job done.

   - Tasks are for tracking any action that needs to be managed to completion by a due date.
   - Notes allow you to capture note information as well as upload file attachments.
   - Calls allow you to track all of your phone calls with leads and customers.
   - Meetings are like calls, but also allow you to track the location of the meeting.

5. **Email**

   The Email module lets you compose and send emails from within 1CRM, and associate sent mail items with Contacts, Accounts, Projects, Leads, Cases, Opportunities, or Bugs. Incoming email may be received from one or more mailboxes via POP3 or IMAP, and filed in user-created personal email folders.

6. **Forums**

   The Forums module provides the ability to create discussion threads, and attach them to most common items of information in 1CRM. Users can register for notifications for specific threads, and there is also a dashlet provided to show recently updated threads.

7. **Chats**

The Chats module holds Chats passed into the CRM from an integrated website chat system such as LiveChat. Completed Chats are displayed as part of the History sub-panel on Leads and Contacts, offering another useful source of information about a form of customer contact (often known as a customer *Touch*).

8. **Accounts**

   View a paginated account list, or search for an account. You can click on a specific account to zoom in on the detailed account record. From a specific account record, you may link to related contacts, activities, leads, opportunities, cases, or member organizations.

   Accounts are the companies with which your organization does business. 1CRM allows you to track a variety of information about an account including website, main address, number of employees and other data. Business subsidiaries can be linked to parent businesses in order to show relationships between accounts.

9. **Contacts**

   View a paginated contact list, or search for a contact. You can click on a specific contact to zoom in on the detailed contact record. From a specific contact record, you may link to the related account, or leads, opportunities, cases, or direct reports (related contacts).

   Contacts are the people with whom your organization does business. As with accounts, 1CRM allows you to track a variety of contact information such as title, email address, and other data. Contacts are usually linked to an account, although this is not required.

   Using selected sets of Contacts, you can perform a Mail Merge to create personalized letters in PDF format. Or you can perform Quick Campaigns to Email them personalized Emails from HTML templates.

10. **Campaigns**

    You can create 1CRM marketing campaigns to track and manage your business' marketing campaigns and targets. Email templates are used which support variable data substitution for sending personalized mass emails.

11. **Leads**

    View a paginated list of leads, or search for a specific lead. You can click on an individual lead to zoom in on the lead information record. From that detailed lead record, you can link to all related activities, and see the activity history for the lead.

    Leads are the people or companies with whom your organization might do business in the future. Designed to track that first point of interaction with a potential customer, leads are usually the hand off between the marketing department and the sales department. Not to be confused with a contact or account, leads can often contain incomplete or inaccurate information whereas contacts and accounts stored in 1CRM are core to many business processes that require accurate data. Leads are often fed into 1CRM automatically from your website, trade show lists or other methods. However, you can also directly enter leads into 1CRM manually.

12. **Opportunities**

    Opportunities track the process of selling a good or service to a potential customer. Once a selling process has commenced with a lead, a lead should be converted into a contact, an account and an opportunity. Opportunities help you manage your selling process by tracking attributes such as sales stages, probability of close, deal amount and other information.

    Use the Opportunities module to view a paginated list of opportunities, or search for a specific opportunity. You can click on an individual opportunity to zoom in on the opportunity information record. From that detailed opportunity record, you can link to all related activities, see the activity history for the opportunity, and link to related lead, account and contacts.

13. **Partners**

The Partners module defines your sales partners, which may be linked to *Leads*, *Accounts*, *Opportunities*, and *Invoices* – and helps track their role in finding and closing new business.

14. **Marketing Events**

    The Marketing Events module defines Marketing Events, and tracks and manages the registration and attendance of *Leads* and *Contacts* (*Accounts* in B2C mode) at one or more sessions per event. Email reminders may be programmed in the run-up to the event.

15. **Forecasts**

    The Forecasts module allows each sales person to review his or her opportunities which are due to close in a given forecasting period, and to commit a forecast for that period. Sales management can set sales quotas, and review opportunities, weighted opportunities, and opportunity totals classed as *Pipeline*, *Best Case*, and *Commit*. The roll-up of sales forecasts through the organizational hierarchy may be reviewed, and the reporting structure navigated through a drill-down interface.

16. **Documents**

    Lets the user create, update, or search for and access all sorts of revision-controlled corporate documents, from HR policy documents, to sales price lists, and health claim forms.

17. **Quotes**

    Quotes may be prepared for clients, using data from the *Product Catalog*. Prepared quotes may be converted to Acrobat PDF format, and emailed directly to the client. Quotes may also be converted to *Sales Orders* or *Invoices*.

18. **Sales Orders**

    Sales Orders are an intermediate stage between *Quotes* and *Invoices* – and not all businesses will choose to use them. They are most useful for businesses that often have to manufacture products ordered from them, or frequently part-ship orders, and need an order desk to track when orders have been fully shipped. The Sales Orders module can prepare packing slips and sales orders in PDF format.

19. **Invoices**

    Invoices may be prepared for clients, using data from the *Product Catalog*. Prepared invoices may be converted to Acrobat PDF format, and emailed directly to the client. A shortcut is available within this module to create *Incoming Payments* and apply them against invoices.

20. **Credit Notes**

    Credit Notes are used to reduce the amount due from a client on one or more invoices. They may involve sending a cheque to a client as a full or partial refund, or simply reducing their balance due if payment has not already been received.

21. **Shipping**

    The Shipping module manages full or partial shipment of sales orders or invoices, links quantity shipped to each line of Invoices, generates packing slips, tracks product serial numbers, and decreases stock levels automatically.

22. **Payments**

    1CRM records both incoming and outgoing payments. Incoming payments are linked to Invoices, and reduce the balance due (Receivable) on one or more Invoices. Outgoing payments re linked to Bills from Suppliers, and reduce the balance due (Payable) on one or more Bills.

23. **Purchase Orders**

    Purchase Orders may be prepared for suppliers, using data from the *Product Catalog*. Once purchase orders are prepared, they may be converted to Acrobat PDF format, and emailed directly to the supplier.

24. **Bills**

    Bills are used to record incoming Invoices from Suppliers. These bills may be the direct result of issuing a *Purchase Order*, or they may be some miscellaneous bill for which no P.O. was issued. To speed the process of creating a bill that results from a P.O., purchase orders have a *Convert to Bill* button to convert them into a bill. Shortcuts are available within this module to create *Outgoing Payments* and apply them against purchase orders, and to view a list of all outgoing payments.

25. **Receiving**

    The Receiving module links quantity received to each line of *Purchase Orders*, links to the *Sales Order* (if any), and increases stock levels automatically.

26. **Product Catalog**

    The Product Catalog contains details of *Products* and *Assemblies* (complex products specified as a set of simple products) which may be quoted and sold to customers. (***Note:*** Ad-hoc products may also be quoted and sold, so not all products must be in the catalog).

27. **Discounts**

    Discounts may be defined as either Fixed discounts, or as Percentage discounts. In either case, a discount may be defined as applicable to all products, or as only applicable to a specified list of products from the catalog.

28. **Subscriptions**

    The Subscriptions module lets you manage any subscription services you offer to clients. Define the *Plans* you offer, and track all your client *Subscriptions* over time. Clients may access the *1CRM Customer Connection* Self-Service Portal to self-manage their subscriptions! Used within Subscriptions are the modules for Plans, Addons, Options, Coupons and Customer Levels.

29. **Commissions**

    Commissions are used to track commissions earned by sales people, on either Sales Orders or Invoices. The system admin can set overall commission rates, and commission splits may be defined on a deal by deal basis.

30. **Price Books**

    Define multiple price books, and assign a default price book to each client. Cater to a mix of retail and distribution clients, or smaller vs. larger clients, with a convenient price book for each pricing channel or level. Each client will get the pricing from their assigned price book for all quotes and invoices and as usual, users may override these default prices if permitted.

31. **Projects**

    View a paginated list of projects, or search for a specific project. You can click on an individual project to zoom in on the project information record. From that detailed project record, you can link to all related activities, see the activity history for the project, view all related project tasks and documents, and link to project contacts.

32. **Human Resources**

    The HR module records employee data such as salary, dependants, emergency contact info, as well as vacation and sick days taken. Note that it can keep records on employees marked as *Info Only* – who cannot login to 1CRM, but can still be documented for HR purposes.

33. **Booked Hours**

    Booked Hours may be created in the Cases or Projects modules, or in the Calendar. They record time spent on Cases or Projects, or on other business tasks. Eventually every Booked Hours entry ends up as a line on a timesheet, regardless of where it was created.

34. **Timesheets**

Users may file timesheets weekly, bi-weekly, semi-monthly or monthly, to record the time they have spent on *Project Tasks*, service *Cases*, or other activities. All timesheet entries are automatically allocated to the related project or case if relevant, and project costs are tracked monthly and compared to estimates.

35. **Expense Reports**

    Expense Reports are used to record personal expenses incurred on the business' behalf, and to enable employees to claim those expenses back from the business.

36. **Booking Categories**

    Booking Categories are a critical part of recording your time and expenses, as well as generating recurring invoices for Recurring Services. Each Booking Category has a Booking Class, the options for which are Billable Work, Non-Billable Work, Expenses and Recurring Services. These allow you to define Booking Categories to be used for hours booked to Cases and Projects (Billable or Not Billable), as well as for line items on Expense Reports and for the types of services you offer as Recurring Services.

37. **Service Subcontracts**

    View a paginated list of service subcontracts, or search for a specific subcontract. The paginated list shows the expiry status of each subcontract. You can click on an individual service subcontract to zoom in on its detail record. Each subcontract detail record shows a list of what *Supported Products* are covered by that subcontract, and a list of any *Cases* which have occurred which are associated with that subcontract.

38. **Supported Products**

    View a paginated list of supported products, or search for a specific product. You can click on an individual product to zoom in on the product information record. From that detailed product record, you can see the account which owns the supported product, and the service subcontract which covers the product, as well as supplier and pricing information.

39. **Recurring Services**

    Define a service which is delivered over time, and for which a recurring invoice needs to be emailed to the client, as well as to an associated employee. Recurring Services work well for businesses with subscription models such as Internet Service Providers, or Managed Service Providers. Invoices may be generated monthly, quarterly or annually.

40. **Cases**

    Cases are the handoff between the sales department and the customer support department. Cases help customer support representatives manage issues or inquiries to completion by tracking information for each case such as its status and priority, the service contract, asset description and serial number, the user assigned, as well as a full trail of all related open and completed activities and *Booked Hours*.

    Use this module to view a paginated list of cases, or search for a specific case. You can click on an individual case to zoom in on the case information record. From that detailed case record, you can link to all related activities, see the activity history for the case, and link to related contacts.

41. **Software Bugs**

    Tracking software bugs is an important function of a customer support department. The Software Bugs module helps customer support representatives manage software-related support problems or inquiries to completion by tracking information for each bug such as its status and priority, its resolution, the user assigned, the release of software involved, its type (defect or feature) as well as a full trail of all related open and completed activities.

    This module lets you view a paginated list of reported software bugs. You can click on an individual bug to zoom in on the detailed bug report. From that detailed bug report, you can link to all related activities, see the activity history for the bug, and link to related Contacts, Accounts, and Cases.

42. **Knowledge Base**

    The Knowledge Base module provides single-click article creation from *Service Cases*, plus the ability to use conventional detail and edit views to create and edit articles. Articles may be full-text searched, and binary files and 1CRM *Documents* may be linked to articles; checkboxes control if articles may be seen by clients in the *1CRM Customer Connection* Self-Service Portal.

43. **Reports**

    A report designer and generator is provided, which may be used to develop your own custom reports as desired. A number of standard reports are included as well to kick start reporting.

44. **Dashboards**

    The Dashboard tab displays a list of definitions for Dashboard pages throughout the system. Ten are created by default, but you can have more or less. Each Dashboard can contain any mix you like of selected dashlets and charts. Dashboards may be prepared and yet not published until a later date if preferred. They can be individual to a user, or shared with all users. And once defined they may be moved around from one tab group to another, or within a tab group.

45. **Activity Log**

    This module allows users to see who is doing what within 1CRM - and sometimes more importantly, who *did* what. A dashlet is provided to access Activity Log data, or you can prepare reports within the module itself.

46. **System Bulletins**

    This module is used to post news messages to all system users about things such as system upgrades, planned outages, or any other upcoming changes. A dashlet is provided to make sure these messages are visible, and you can prepare messages using the module itself.

47. **Data Privacy**

    This module is used to manage all 1CRM Data Privacy Activities. These include Request to View, Right to Erase, Consent to Process and Withdrawal of Consent. See more details in the 1CRM and GDPR document.

48. **Administration**

    The Administration module is used by supervisory users to define a number of configuration settings that control the 1CRM experience for all the other users. Data access control, email settings, user management, system repairs and upgrades… these are all tasks addressed within the Administration module.

3.4 How Do I Operate a CRM?

3.4.1 Selecting a Module…

1CRM has several selectable themes, including Claro, Delight, Spectrum, Flex and OeanVue. All of these offer menus that consist of a series of tabs across the top of the screen (images in this User Guide typically show the Claro and Flex themes).

From the Home Dashboard –

- Using the menu system offered by the theme you have selected, click on the tab that shows the name of the Module you wish to use. All of the Module screens use the same basic layout – making it easy for you to move from one area of the application to the next.

3.4.2 List View Screens and Module-Level Searching

The main body of most Module screens (Dashboards, Calendar, and Administration are the main exceptions) have three main elements to them – a choice of layout tabs at the top, a list view of items below, and a collapsible Mass Update and Teams Assignment panel at the bottom. As an example, look ahead to Figure 23 (The Accounts Module). Usually the layout tabs include *Browse All* and *Quick Filter* tabs, as well as a *Reports* tab. Additional layouts tabs may be included as standard - such as the *Customers* and *Suppliers* tabs in the Accounts list view. And more layout tabs called Smart List tabs may be custom defined by the user. The Browse All tab includes a basic search capability, and the Quick Filters tab includes an extensive set of search options. You can see these *Browse All* and *Quick Filter* layout tabs on Figure 23.

When working on the list view for a module, you can work with the complete list of all data for that module, or use a search filter to reduce it to a more manageable size. To use a search filter, simply select the *Browse All* or *Quick Filter* layout tab, type in one or more boxes, and click on the *Apply Filter* button below the search/filter panel.

Text entered in search fields will match starting at any position in the field – for example *fred* will match *Frederick*, or *Alfred*, in a first name field. If text is entered, or a selection is made, in more than one filter field, then a record must match on all those fields to be included in the filtered list.

3.4.3 System-Level Searching

Using the system level search box (*see highlighted item 4 on Figures 15-18 above*) is much the same, only it searches whichever of these modules you select: Accounts, Bills, Software Bugs, Contacts, Email, Leads, Calls, Cases, Expense Reports, Meetings, Notes, Opportunities, Partners, Payments, Projects, Project Tasks, Purchase Orders, Quotes, Sales Orders, Tasks and Users. It looks for the search text to match in selected fields for each module (the fields are defined in module metadata). Then all matching records are displayed in a series of successive lists.

Note: You can select if search strings will match at any point in a field, or only from the beginning.

Note: Each List View screen also has a Help icon to access the Online Guide for 1CRM.

3.4.4 Smart List Tabs

Within the layout tabs on every list view screen you can also see a special tab at the far right labelled simply +. Selecting this tab allows you to create your own custom layout tabs called Smart List tabs, using the settings of the current tab as a starting point.

When defining a Smart List tab, the *Edit Layout* popup is displayed with tabs labelled *General* (to set the layout's name and description), *Filters* (to filter which data items you want to see in this layout), *Column Layout* (to define the columns of data to be presented), and *Sorting* (to set one of more levels of data sorting). 1CRM has been designed in a manner such that these Smart List tabs on list views are actually very similar to reports. In fact, the *Edit Layout* popup is very similar to the popup for *Edit Report*, and so we will explain both of them in the same section later in this guide. (*See section 9.1.2: Creating New Reports*).

As several Smart List tabs may be defined for any specific module, you can choose between them to see the same data presented a number of different ways. Simply click on the tab you want for any custom or standard layout.

Note: 1CRM will remember your current layout tab for each module until your session ends.

Arranging Smart List Tab Order

Second from the end on the right of the layout tabs on each list view you will find a tab labelled . Click on this tab to change the order of your layout tabs. A popup dialog box is displayed which allows you to drag the tabs you have defined up and down in display order. Particularly useful is the ability to move a tab you have defined yourself to the top of the list, so it becomes this module's new default list view. You can also mark tabs as *Visible* or not, letting you keep some definitions available but inactive if you like.

3.4.5 Accessibility: Keyboard Shortcuts, Screen Reader

To complement the normal 1CRM navigation using mouse, trackpad or touch screen, there are also a series of keyboard shortcuts developed for both accessibility purposes (keyboard-only navigation) and advanced users. Screen readers are also supported for accessibility.

List View Keyboard Shortcuts

- ~ Move focus to the top bar with calendar, mail & user account links
- ` Move focus to the 1CRM menu (Today's Activities, Sales & Marketing…)
- l Return to list view from detail view
- ? Move focus to the system search field (anywhere except in a text box)
- / Move focus to the list view text filter field(s)
- u Toggle expand/collapse of mass-update panel (Shift-U within mass update panel fields moves focus to the Update button)
- a/z Move row selector up and down the list view rows
- v View the currently selected list item
- n/p Move list view to the next or previous page
- N/P Move list view to the last or first page
- +/- Show more or fewer rows per page on list view (add/subtract 10 rows)
- c Create a new item for the current list view
- m Check/uncheck (mark) the currently selected list item
- M Mark/unmark all items on the current list view page
- 1-9 Select the corresponding list item
- A/Z Mark row and move selection up/down

Detail View Keyboard Shortcuts

- e Edit the current item
- d Duplicate the current item
- x Delete the current item
- l Return to list view (like gmail)

3.4.6 Detail View Screens and Sub-panels

From a module's list view, clicking on any entry in the list will bring up the detail view for that item – for example the full details of a Contact, or an Account. This detail view shows more information than the list view for the specific item selected. It also shows all associated items of information, and lets you click on links to them. For example, the Accounts detail view screen lists all associated open Activities (tasks, meetings and calls that are not yet completed), History (notes, emails, plus completed tasks, meetings, & calls), Contacts, Member Organizations, Events, Cases, Documents, Threads, Software Bugs, Projects and Supported Products.

Like a list view, a detail view can also have multiple tabs in the display, as for example the Accounts module does. The Accounts module offers a *Sales Information* tab (for Accounts that are Customers rather than Suppliers) with information panels for related *Opportunities*, *Leads*, *Quotes*, *Sales Orders*, *Invoices* and *Expense Reports*. These lists of related information are called sub-panels.

This listing of associated items as sub-panels is really the fundamental power of the 1CRM system – the system associates and represents information in much the same way that your brain thinks, and lets you navigate or explore the information that way. Figure 20 below shows a sample detail view screen for the Accounts module.

Each detail view screen layout includes several handy controls:

1. *Return to List* – This link at the top right of each detail view may be used to return to the list view for that module.
2. Action Button: This button offers several dropdown options:
    a. *View Change Log* – Each module's change log tracks certain key field values on every record. A change log entry is automatically created each time any of these fields is changed, noting the field changed, the old and new values, the user that made the change, and the date of the change.
    b. *Arrange Subpanels* – Use this link to re-order the subpanels of any Detail View. This is a personal preference for the current user only, and also permits subpanels to be made Visible or Invisible. ***Note:*** Subpanels may also simply be dragged into your preferred order.
    c. *Customize Tabs* – Use this link to add, remove or re-order additional tabs on any Detail View. (See the Accounts module *Sales Information* tab for an example of additional tabs on a detail view.) Once new tabs have been added, admins may use the Layout Editor to manage the fields shown on the layout for each tab. ***Note:*** Only Admin users will be offered this link.
    d. *Show Actions* – This link will show you any pending workflow actions for this record.
    e. *Edit Custom Fields* – Use this link to define custom fields for the current module. ***Note:*** Only Admin users will be offered this link.
    f. *Edit Layout* – Use this link to alter the screen layout for the current module. ***Note:*** Only Admin users will be offered this link.
    g. *Create Mobile Layout* – Use this link to create a custom mobile screen layout for the current module. ***Note:*** Only Admin users will be offered this link.
3. Show/Hide Controls for each sub-panel – To the right of each sub-panel title, there is a chevron pointing up or down. This is used to show or hide the main body of the sub-panel, enabling the user to limit vertical screen scrolling, focus on the data that is important to them specifically, and to reduce bandwidth requirements of each screen (which will increase system performance). Click on it to hide the sub-panel main body, and to restore it.
4. Each Detail View screen also has a Help icon to enable the user to access the Online Guide for 1CRM.

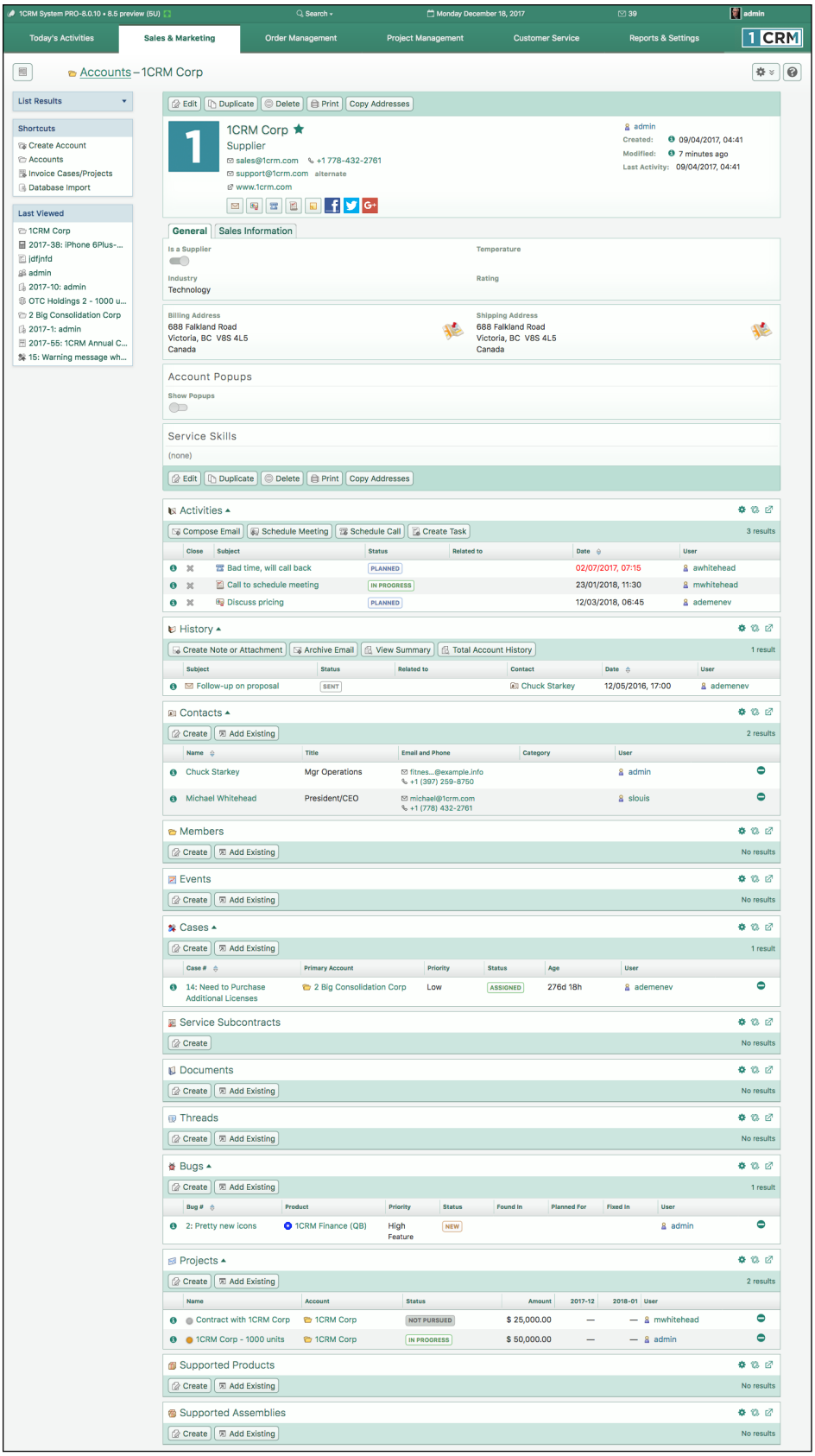


Figure 20: The Account Detail Screen (Sidebar List View Expanded)

3.4.7 The 1CRM Online Guide

Most List and Detail views in 1CRM offer a Help icon at the top right of the screen to access the Online Guide. The Online Guide contains the text and images from this User Guide, in an HTML format. When the Online Guide is displayed, it comes up in a new browser window. It offers a collapsible navigation tree in a panel on the left, with controls to *Collapse all* or *Expand all* branches.

When you first open the Online Guide, if 1CRM can recognize what module you are using when you click on the Help icon, it will enter the Online Guide with the content for that module open. You can click on any right-pointing blue triangle to expand a branch, or click on a downward-pointing one to collapse a branch. Blue diamonds indicate the end of a branch - a leaf.

There is a link at the top to download a PDF of the full 1CRM User Guide. As well, there is a *Print* icon to print the current section of the User Guide that you are reading in the Online Guide.

You can access the information in the Online Guide by navigating to a specific section with the navigation tree on the left, then browsing the text in the main panel, as shown in the Figure below.

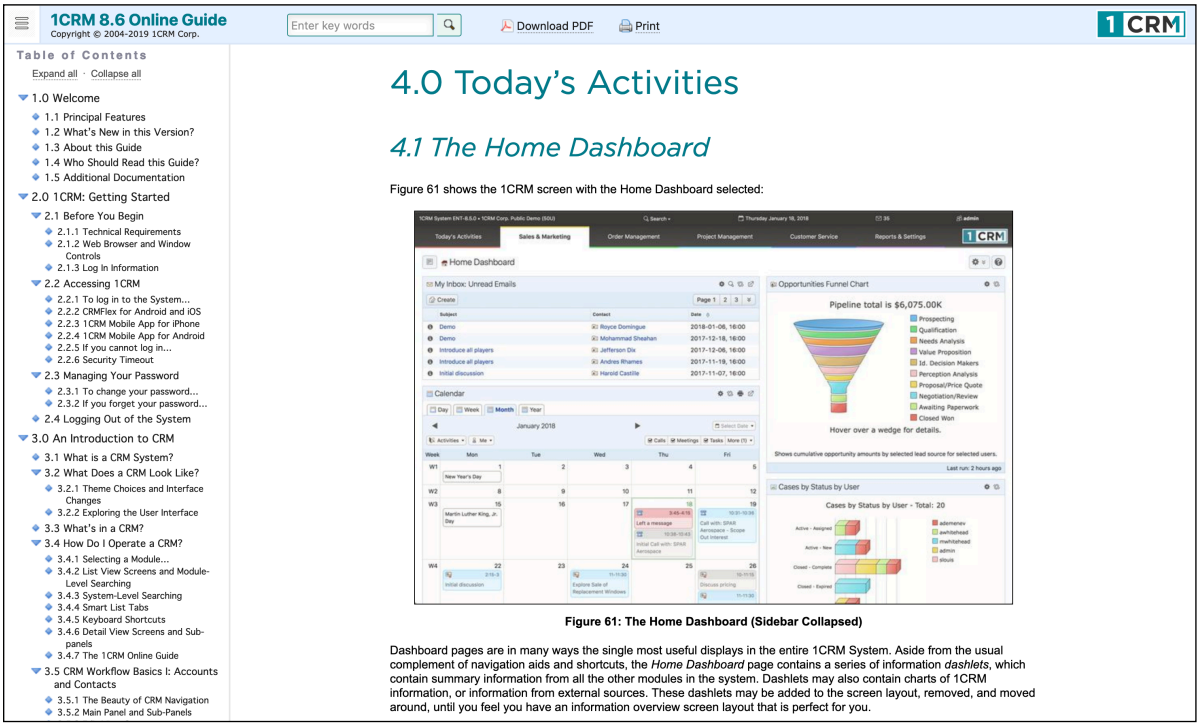


Figure 21: Online Guide Navigation

Alternatively you can enter search text in the search box, and click on the Search button, as shown in Figure 22. In this case, the navigation tree panel is replaced by the search results. You can click on any result to see the detailed content associated with it in the main panel. After you have clicked on at least one search result, you can click on the *Next* and *Previous* arrows to step through the search results forwards or backwards.

When you have finished looking at a set of search results and want to return to normal navigation of the Online Guide, just click on *Done Search*.

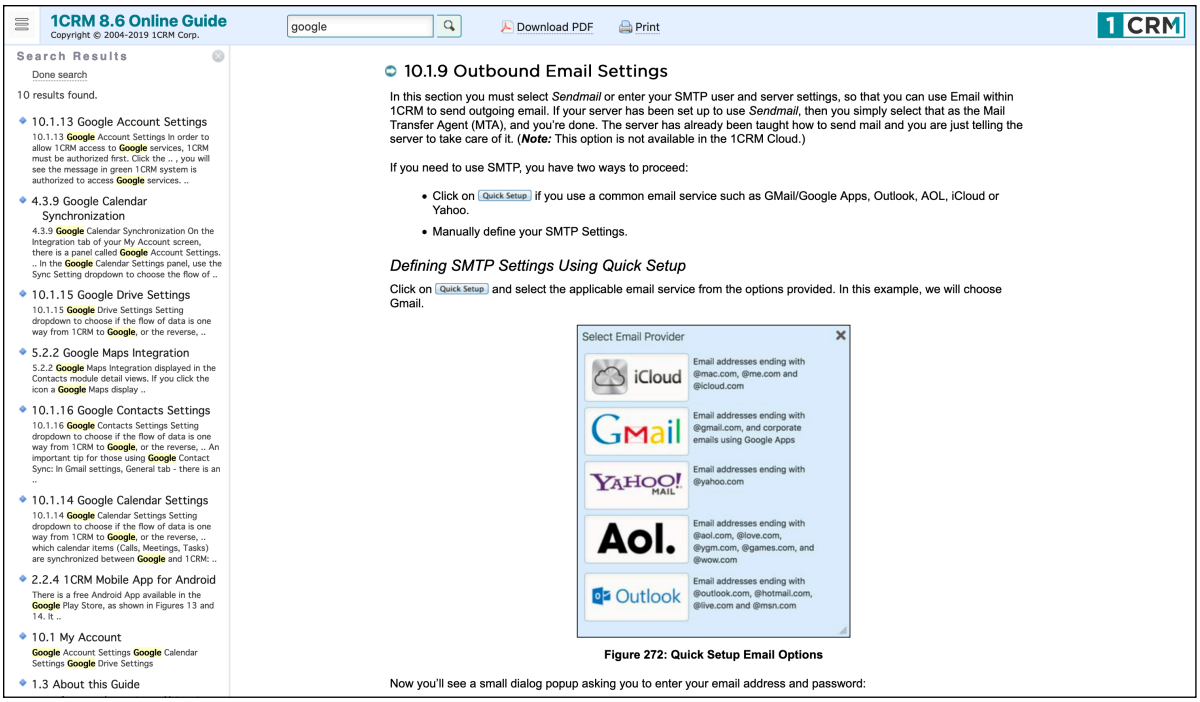


Figure 22: Online Guide Search Mode

3.5 CRM Workflow Basics I: Accounts and Contacts

Now – click on the *Sales & Marketing* tab in the menu system, and then on the *Accounts* module in the module list on the left side of the screen. This shows you a list of all Accounts in the system - we shall normally refer to this as the Accounts list view. If you have the 1CRM demo data installed your screen should look something like this:

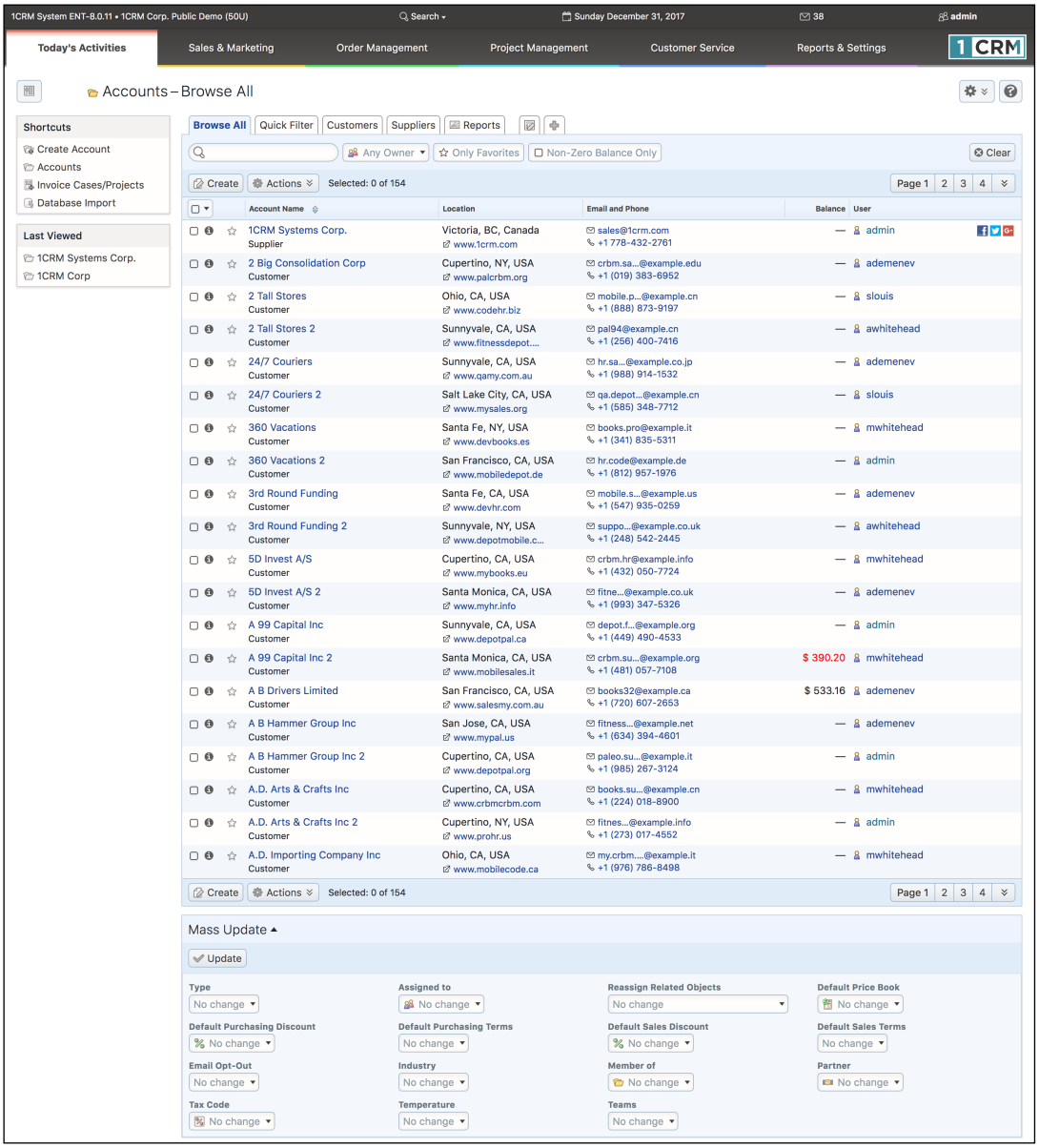


Figure 23: The Accounts Module - List View

The data we are showing here is our standard demonstration data - a sample set of accounts, contacts, leads, opportunities, etc.. Clearly, the company names are made up, as we can't expose information about real companies here, but the sample data here has been created to demonstrate

all the key capabilities of the system. Try to imagine that what we are looking at is a list of your accounts – for your organization.

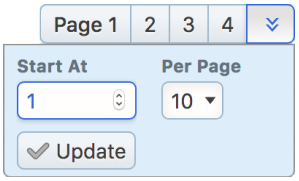


Figure 24: Pagination Controls

At the top of the list of accounts, you can see some controls and information that indicate that there are actually 155 accounts in the system, and that you are currently looking at page 1 of several pages of accounts. Page selection controls are provided to page through sections of the full list of accounts, as well as a control to go to the overall start of the list. And if you click on the chevron, you will see a box pop up (as shown) which lets you move your position in the list to wherever you like. Just enter any number for *Start At*. Optionally also select a new value on the *Per Page* dropdown control, to temporarily set a new value for the number of lines shown per page, and then just click on the *Update* button.

When working on the Accounts list view, you can work with the complete list of all Accounts, or use a search filter to reduce it to a more manageable size or find a specific account. To use a search filter, simply select the *Browse All* or *Quick Filter* layout tab, type in one or more boxes, and click on the *Apply Filter* button below the search/filter panel. All the accounts will be listed which match the filter criteria. More than one limiting criterion may be applied – you could look for all accounts which start with *a*, and which are in New York City, and all accounts which satisfy those constraints will be listed. To go back to seeing the entire list of accounts, simply click on the *Clear* button in the search panel to remove all filter conditions.

It is important to understand that the accounts list shown to you by default is the entire set of accounts in the system. For sales people using the system, they may wish to focus exclusively on their own accounts, which they may do by selecting the *Assigned to Me* value on the Owner dropdown filter on the *Browse All* tab. You may also filter with the *Non-Zero Balance Only* control, which will limit the Accounts list to those Accounts that owe you money.

Favorites

You can limit the Account list to only your favorites by clicking on the *Only Favorites* button. Favorites are a handy way to focus on the most important items in the list view. Each item in the list has a Favorite star you can click on to mark the item as a Favorite, or to remove the Favorite designation at a later date. The following modules offer the Favorites capability:

- Accounts
- Contacts
- Leads
- Opportunities
- Products
- Knowledge Base Articles
- Bugs
- Cases
- Documents
- Email Templates

- Projects
- Reports

As you move your mouse pointer around within your browser window, you can see that each account name has a link on it, and also a small info icon ⓘ to the left that you can hover over to preview more information from the record. The information preview popup also offers links to *View* or *Edit* the item. If you click on the name of an account, you will go to the detail view for that account. Let's do that now, and click on any account you like. You should see something like the screen shown above in Figure 20.

3.5.1 The Beauty of CRM Navigation

1CRM is representative of the best CRM systems available in the market for the manner in which the system is used, or navigated. There is a menu system across the top for accessing the different types of information, such as Accounts, Contacts, Documents, Cases, Opportunities, and so on. More important, however, is how related items of information are linked together, and how the user follows those links. Figure 20 above shows an Account Detail screen within 1CRM. This is fairly representative of similar screens in other leading commercial web-based CRM systems you may have come across, such as salesforce.com, NetSuite, Microsoft CRM and SugarCRM.

We see the top block of information displays the core information about the account – address, contact information, web site, company email address, number of employees, ownership, industry classification, etc..

The following blocks of information show information that is related to this account, such as ongoing account activities, a history of past account activities, contacts, leads and opportunities within this account, plus ongoing cases (service issues) and projects within the account. Also shown are documents related to the account, products purchased by the account, and any software bugs reported by the account (should that be relevant to your business).

The power of the system is the manner, and speed, with which it can be navigated. Once an account has been looked up and displayed, the user can click on a contact at that account to see their information. That contact record will include a list of related activities to be performed, and the user can click on those to update them. A related meeting may involve other contacts, and their information is listed, and the user can click on them to check current activities related to those contacts. Are there any ongoing cases? When was the last time we met with them? What products have they been buying from us?

Each of these questions is answered with a mouse click. And as more and more of the background information of an account, or contact, or opportunity is revealed, the user may have more and more little questions that come to mind – and each of them can be answered with a mouse click too. Because information can be obtained so quickly and easily, and because that information is related and linked in a manner so similar to the way the user's mind relates those items of information, employees now perform their tasks with a much higher level of knowledge about their customers.

One particularly handy feature of the 1CRM user interface is the *Last Viewed* list of items the user has recently accessed – making it quick and easy to return to an item after following links to information it relates to.

On Account detail view another handy feature is the *Total Account History* button in the History sub-panel. As opposed to the *View Summary* button beside it, which shows a list of Activities related to the Account in date order, this button shows a date-ordered list of Activities related to the Account, plus Activities related to Contacts, Projects, Opportunities, Cases or Bugs that are related to the Account, all merged together to give 100% of the Account history in a single view.

Marshall McLuhan was quite right – the medium is the message. In this case, the medium of a web-based business application, with many linkages between related items of information, makes that information so easy to obtain that it is as if somehow the overall quality of that information has been improved.

3.5.2 Main Panel and Sub-Panels

Examining the Account detail screen, we see a block of general information about the Account at the top, and a series of blocks of information below that with related information, such as Activities, History, Contacts, Opportunities, Leads, Cases, and so on.

Note: We also see something special on the Account detail view - that is another tab labelled *Sales Information*, in addition to the default *General* tab. In effect, the Account detail view has two tabs which together offer the full set of main panel information. And the sub-panels which relate to Sales are shown below the Sales Information tab when it is selected.

To repeat this key principle, the block of general information at the top is referred to as the main panel. The blocks of related information below that are called sub-panels – so we see a sub-panel for Activities, one for History, another for Contacts, etc..

We also see a few buttons just above the main panel – *Edit*, *Duplicate*, *Delete*, *Print* and *Copy Addresses*. These buttons act on this specific account record, allowing us to Edit it, Duplicate it (to create a similar account), Delete it, generate a statement or PDF account details for it, or Copy account addresses to records in related modules.

Just above each sub-panel, we also see a number of buttons. Let's look at the Activities sub-panel as a specific example. This sub-panel offers buttons for *Create Task*, *Schedule Meeting*, *Schedule Call*, and *Compose Email*. While we will discuss these different activities in more detail shortly, for now it is enough to understand that these buttons allow you to add new activities into this detail view screen, which are automatically linked to, or associated with, this particular account.

Within the Activities sub-panel, notice that there are links on the *Subject* and *Related To* fields within each activity. Clicking on these links will take us to the detail view of the activity or the related account (oops – we're already there!). This is your first glimpse of the enormous power of the links within a CRM that speed navigation between related items of information.

For each of the other sub-panels, these similar principals apply – buttons and links are provided to create new items of information related to the current account, to edit or delete those items of information, or to go to the full detail view of those related items of information.

As well, on sub-panels like Contacts for example (and Projects, Bugs, Cases, etc..), to the right of each Contact listed, notice the link ⊖ for removing the relationship between each Contact and the Account.

3.5.3 Edit View Screens

If you look on the left hand side of your screen, you will see the navigation Shortcuts box. Also notice that in the Figure below, you can see the Last Viewed items listed on the left side, rather than at the top. This is configurable using a setting in the My Account screen, in the *Display Options* section.

From the Shortcuts menu, click on the *Create Account* shortcut. You will see the Account edit view screen:

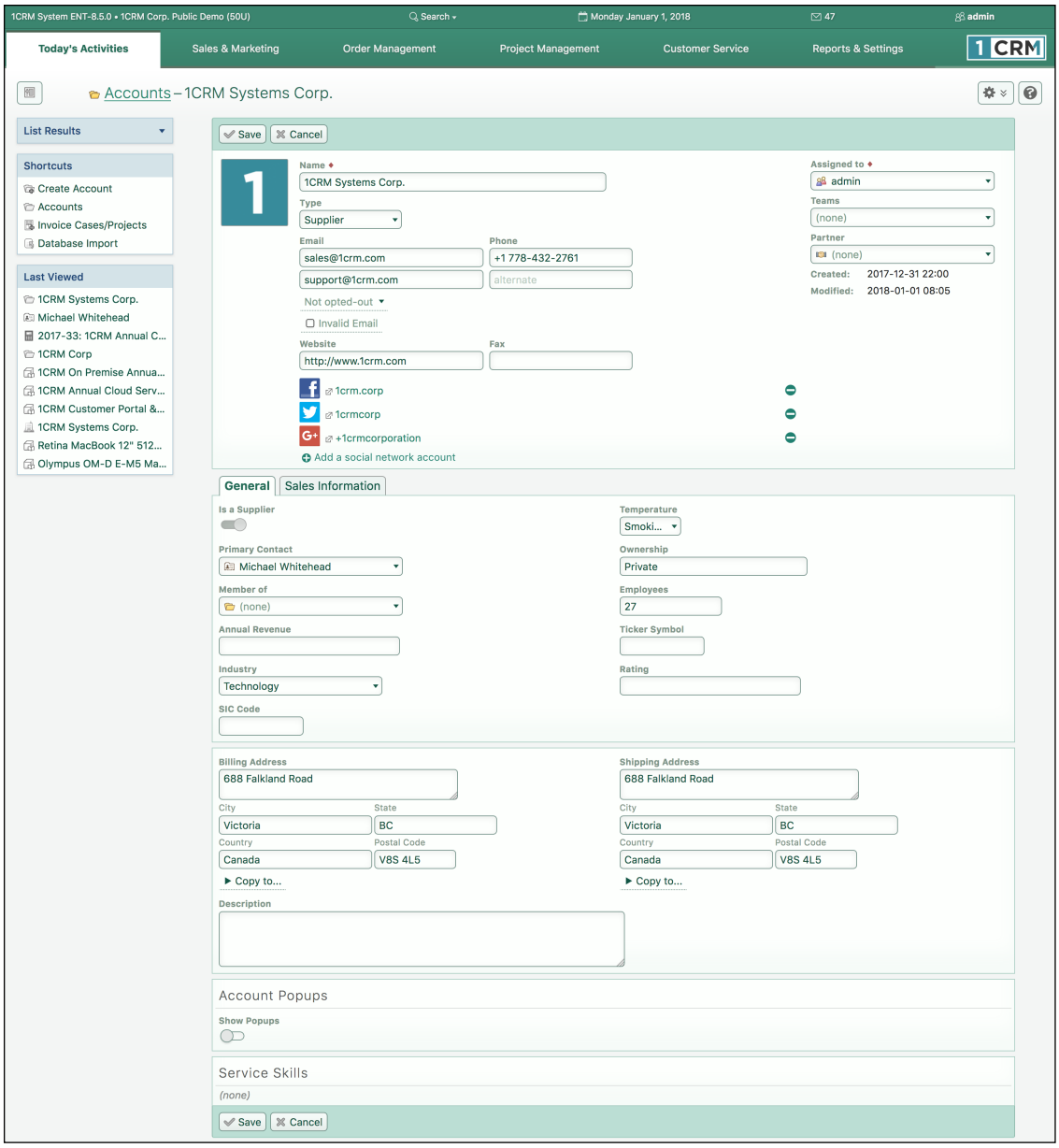


Figure 25: The Accounts Module - Edit View

For some first-hand experience we are going to create a sample account for 2 Big Consolidation Corp. Similar to the sample screen shown above for 1CRM Systems Corp., enter the data for the 2 Big business, and then click on the *Save* button. You will be directed to the account detail view screen for the 2 Big account once you finish.

Working with Different Field Types

As you enter data in the edit view, notice that not all fields behave the same way. This is because they contain different types of data. Some of the different field types are:

- *Lookup Fields:* Several of them, such as *Member Of*, *Via Partner?*, and *Assigned To* are Lookup fields admin such as this. Note the micro-icon at the start of the field and the down arrow at the end. The micro-icon is designed to let you know the field type - in this case, a user.

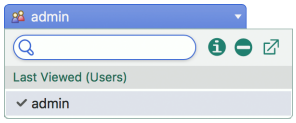


Figure 26: A Lookup Field

Clicking on the down arrow reveals the expanded view of the lookup field as shown above. This expanded view includes:

- A search field: Simply start typing in it to see a dynamic list of search results filtered from the complete set of values.
- An info icon ⓘ to see more details about the currently selected item (in this case, a user).
- A remove icon ⊖ to clear the current value.
- A goto-module icon ⧉ to show a full lookup dialog box for this module, and
- The most recently viewed items for the module involved (in this case Users).

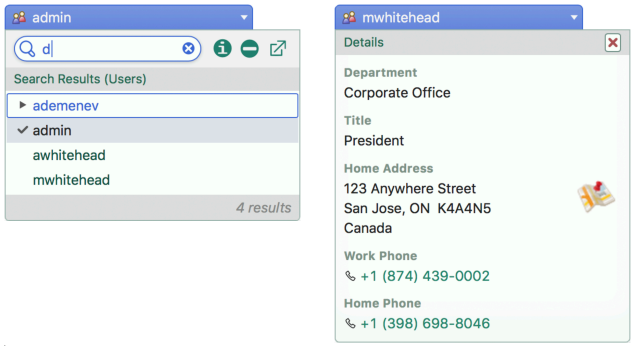


Figure 27: Using Lookup Fields

- *Required Fields:* Some fields (*Name*, *Assigned To*) have an indicator * just to the right of the field name. This means that the field is a required field, and must have a value before you can *Save*.
- *Dropdown Fields:* Several fields (*Tax Code*, *Business Role*, ..) look like this CEO, with a down arrowhead at the end. These fields are dropdown fields. Click on the field to show a dropdown list of options, as seen to the right. Simply select one and the list goes away, and the dropdown field value is updated.

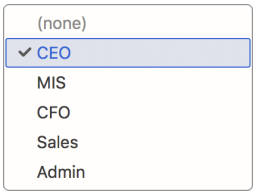


Figure 28: A Dropdown Field

- There are also *Phone Number*, *URL* and *Email* field types - but these look like Text fields on the Edit view. On the Detail view, however, they have a mini-icon at the start to indicate the field type, and typically may be clicked to perform an action such as visiting the URL, writing an email, or calling the phone number. The *Live Business Card* section on a Contact detail view to the right shows several of these types of fields.

Figure 29: The Live Business Card

- *Multi-Select Fields:* These rather unique fields, such as *Category*, allow multiple selections to be made from a dropdown list. When one or zero values have been selected, they resemble a dropdown field on the edit view.

  Once there are multiple selections, they look as seen at the right. Click on the down arrow to see the selection management view, where categories may be added or removed. The remove icon ⊖ is available to remove all values quickly.

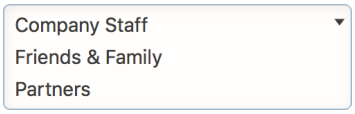


Figure 30: Multi-select Field with Multiple Values

The *Shift* key, or *Command* Key on the Mac, may be used to Add or Remove multiple items from the list of Categories quickly, one after another.

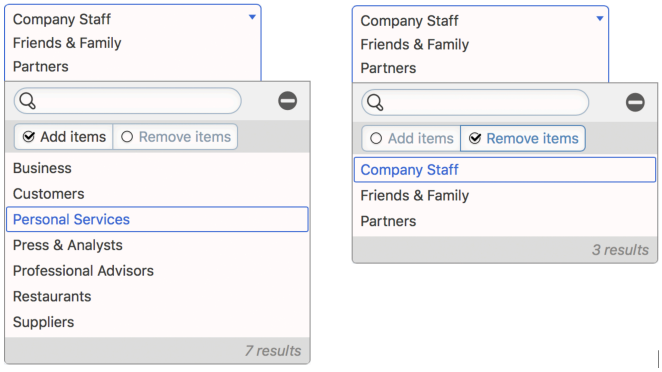


Figure 31: Using MultiSelect Fields

- Additional field types include simple Text fields (*Rating*), Large Text fields (*Description*) and Toggle fields (*Is a Supplier*).
- *Date/Time Fields*: These fields are found on items that appear on your Calendar, such as Calls, Meetings, and Tasks. On the Edit view screens they look like this 05/12/2017, 22:15 . Once you click on the down arrow to edit the values, you'll see an expanded view as shown below.

  On the calendar month view there are arrows to move months or years forwards or backwards. Then simply click on a date to select it, and move on to selecting the time of day. If the date is already correct, you can move directly to setting the time using the clock icon. And here too the remove icon ⊖ is available to clear the field value entirely.

  The time view will have two or three controls depending on the user's selected time format - 24-hour or AM/PM.

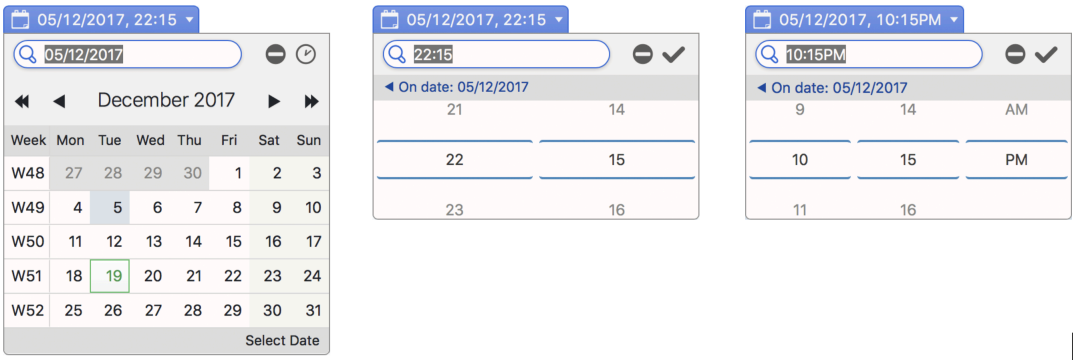


Figure 32: Using Date/Time Fields

One important note once you finish is that you have now saved some data within 1CRM for the first time. In a browser-based system like 1CRM, that data has not been saved on the PC or laptop you are using, but on the 1CRM server instead, from which anyone in your company can retrieve that information (if they are permitted). The beauty of this is that no matter where you are, if you can get access to an Internet-connected device with a browser on it, you can access your 1CRM system, and all the CRM data your company possesses. The device you use to access the system does not have to have anything special installed on it – just a browser. Nor does the use of the system save any data on the device used, other than a few user preferences such as browser cookies.

Now – click on the *Create* button in the Contacts sub-panel – we are going to add a new Contact at 2 Big. The system will show you a brief Contacts popup superimposed on the Account detail view. This type of popup using the *Create* button on a sub-panel is frequently useful to quickly add the basics for a new related item of information, but remain on the current screen while you do it.

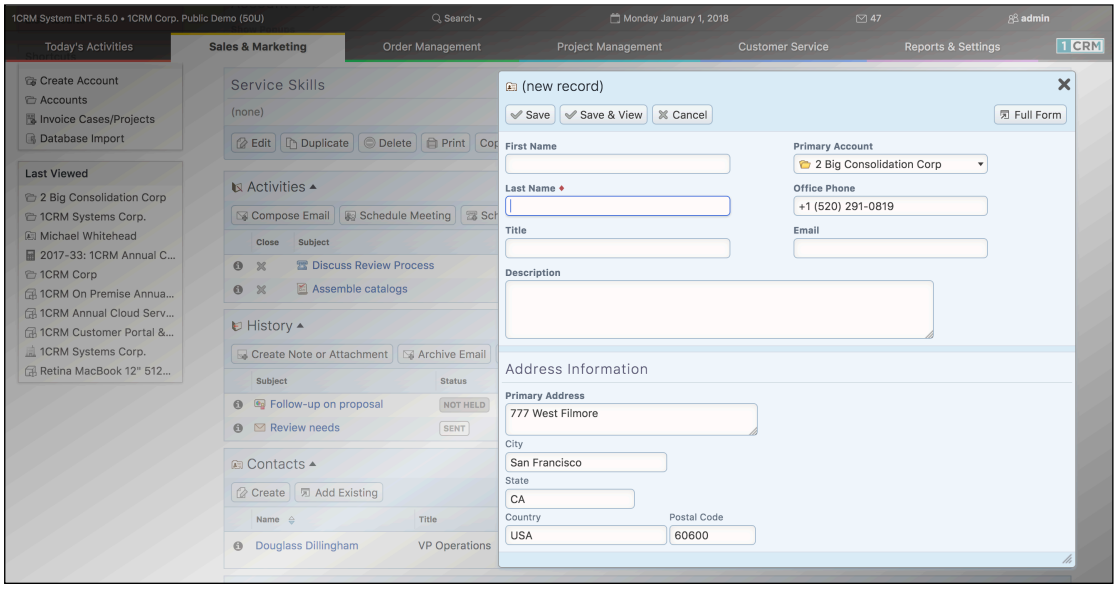


Figure 33: The Accounts Module - Contacts Sub-panel Popup

For the purpose of this exercise, however, click on the *Full Form* button (top right) to see the full form for entering details of a new Contact. Enter his data as shown below. Note as you do that even though you started off in the Accounts module, you are in the Contacts module as you enter the details of the new Contact at 2 Big.

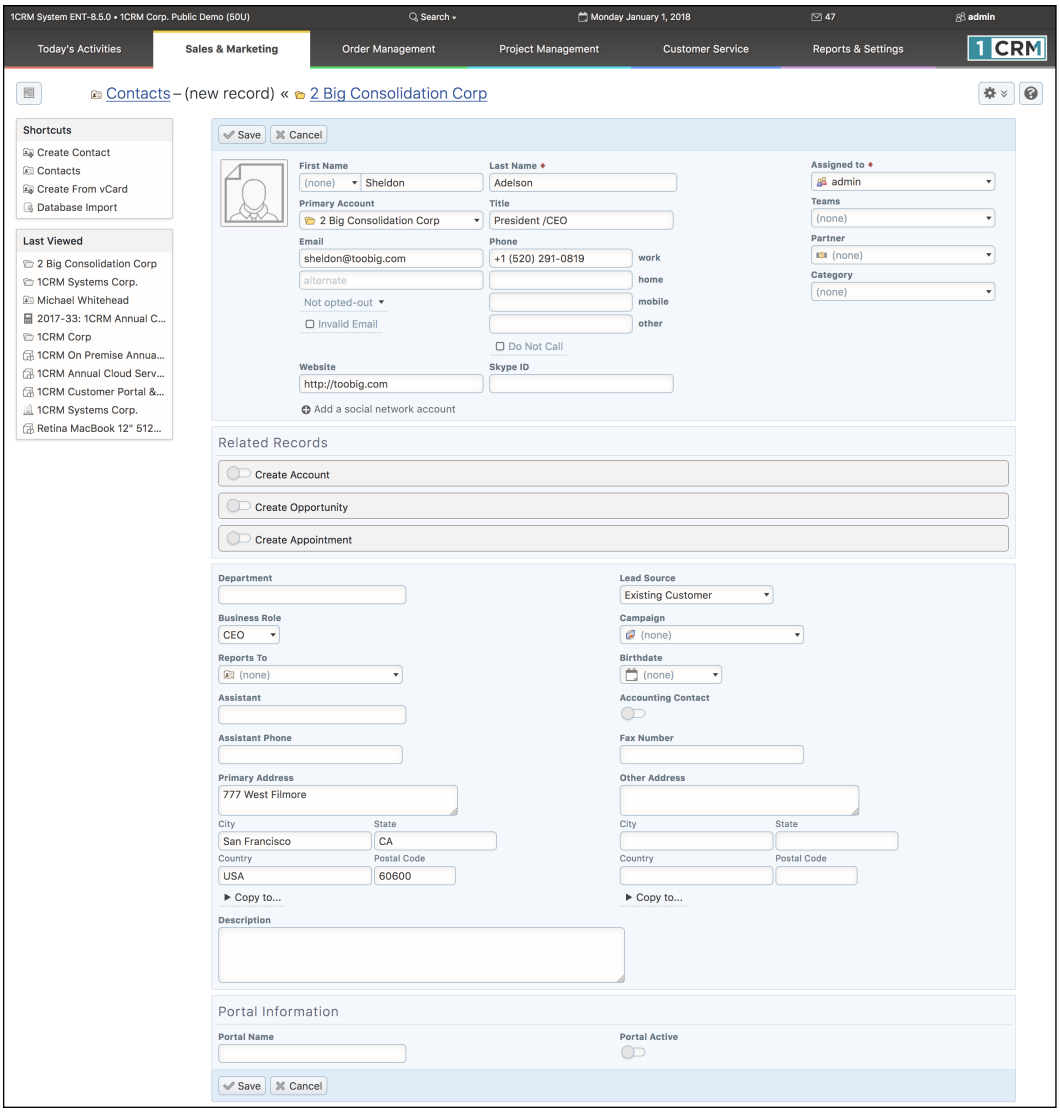


Figure 34: The Contacts Module - Edit View Full Form

Now click on the *Save* button to save the Contact record. Notice that in the *Last Viewed* area of the screen you are beginning to accumulate a list of the items of information you have been working with within the system. These are available as links, to quickly take you back to any item of information you have been working with recently. 1CRM is not a system where you will want to kick yourself (or the system) saying – darn it, I was just there, why is it so hard to get back to it!

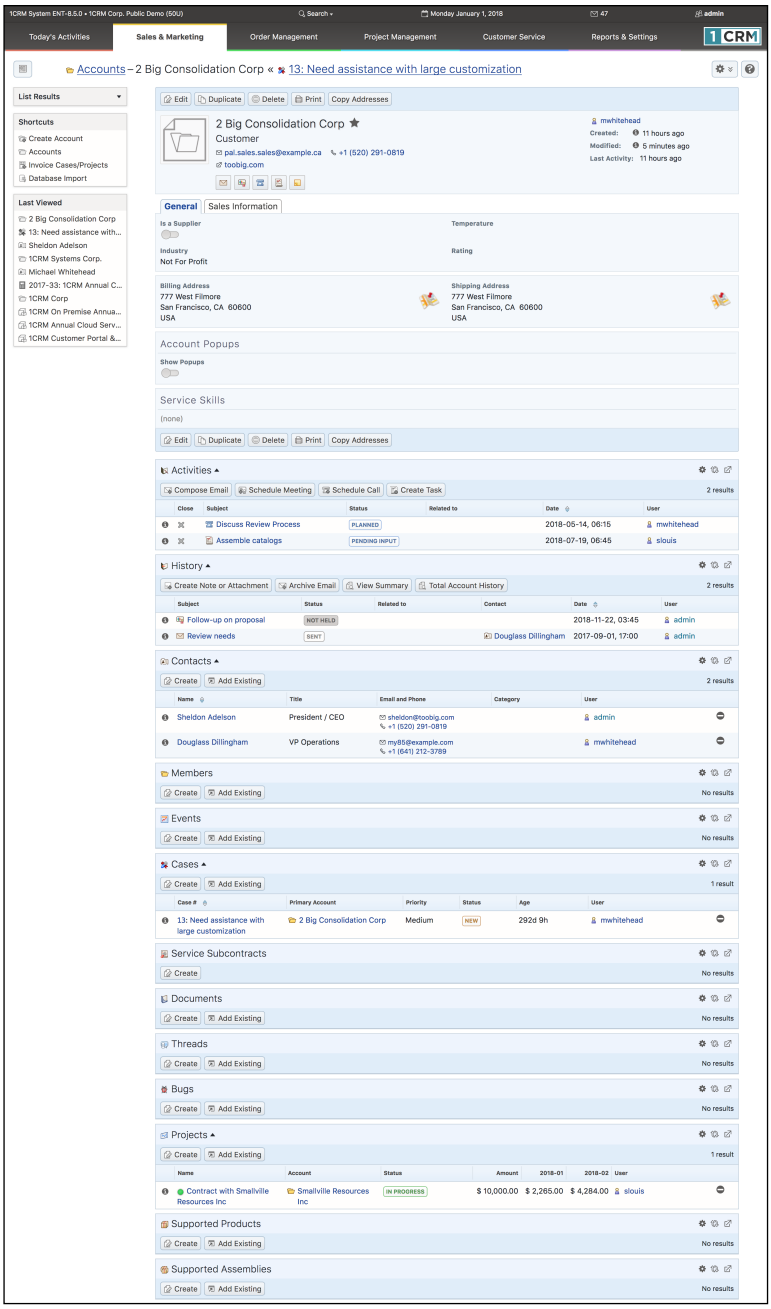


Figure 35: Contact Linked to Account

You should now see a screen like the one above – showing the account detail view for the 2 Big account, with Sheldon Adelson as a contact at that account. To reinforce the ability to link back and forth, up and down and sideways within 1CRM (and any good CRM) – click on Sheldon's contact name to link to his contact detail view screen. From that screen, click on the account name link, to come right back to the account detail view screen for 2 Big.

Now – add yourself as another contact at 2 Big, repeating the process described above. You should now see another contact listed in the contacts sub-panel of the 2 Big account detail view screen. This is another important point. We have re-used all the basic account information in the main panel of the 2 Big account for another contact. We did not have to type it in again. And if any of the 2 Big account information changes, we will only have to edit the 2 Big account record, not the information we have

about our contacts there. This is one of the key advantages of a CRM over a contact manager like Microsoft Outlook – it understands that accounts and contacts are two separate types of information that are linked together, not crammed together into one unsatisfactory amalgam.

3.5.4 Linking and Searching/Filtering

Again – to reinforce the speed and power of navigation in 1CRM – link to your own contact information. Then back to the account detail view. Then on to Sheldon's contact record. A contact can lead to an account, which can lead to other contacts at that account – all extremely quickly. And very relevant to your everyday workday needs.

Go ahead now and explore by yourself the contacts list view. Notice that you can search for a specific contact in the *Browse All* tab above the list of contacts. Click on the *Quick Filter* tab to get a more comprehensive search capability.

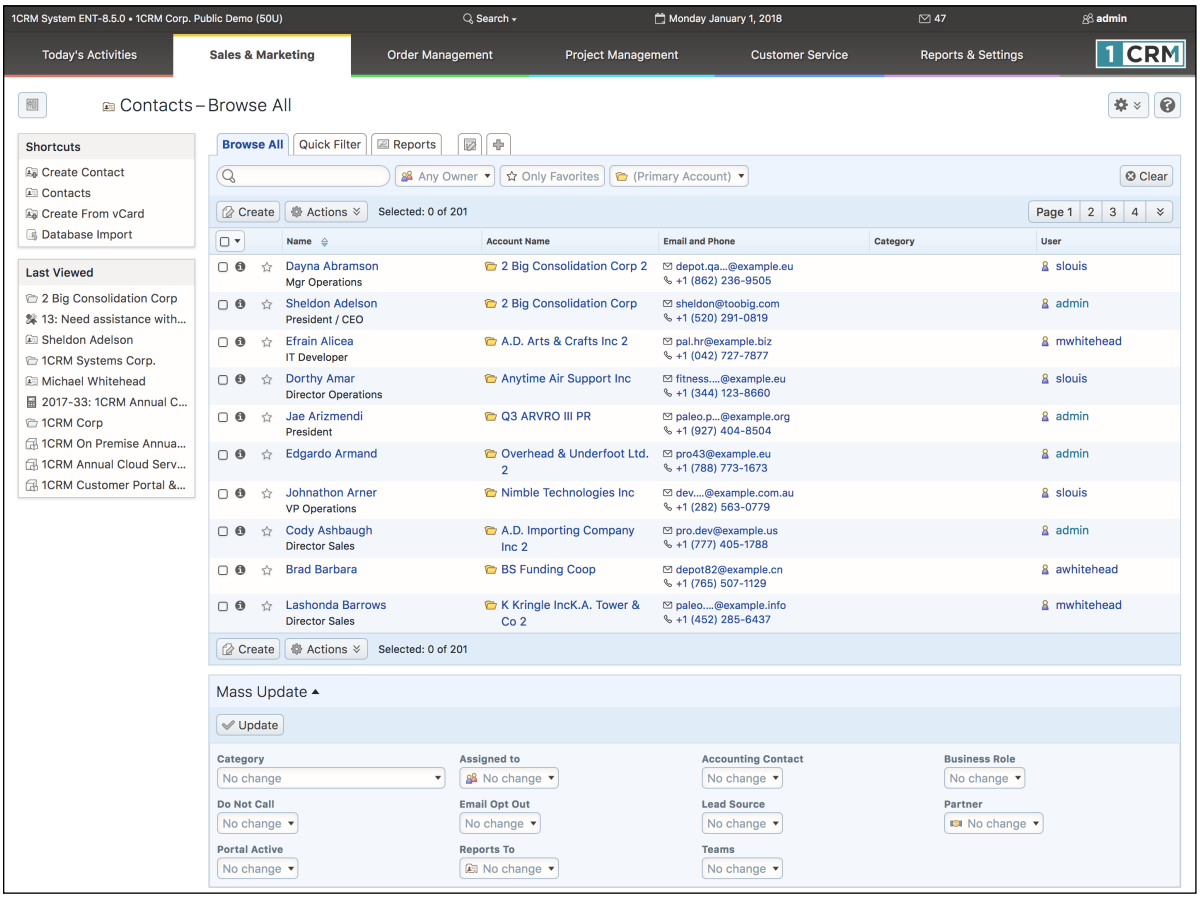


Figure 36: Contact List View with Browse All Tab (10 Items/Page, Mass Update Expanded)

After their install has been completed, and they have been using the system for a few months, we usually ask clients what they like most about using their 1CRM system, and their reply often resembles this:

> "I can search contacts for the name of someone I've only met once or twice over a snack. I only know his first name, but that's OK – it can show me every Ted in the system right away. I pick the one I want from the list of Teds, and link to his detail view, from which I can call him. If he's out, I link to his account detail view, and it shows me who else we know at that company, and I link to one of them and call them. I do this maybe fifty times a day, and so it makes a huge difference to me that I can do it so quickly and so naturally. I swear this system thinks the same way I do!"

3.6 CRM Workflow Basics II: Leads and Opportunities

Now that you have practiced putting Accounts and Contacts into the system, and linking Contacts to Accounts, let's go on to learn about some more types of information your CRM can organize for you.

Within just about all CRM systems, there exist the dual concepts of Leads and Opportunities. They are kept as very different items of information, even though they may sound very similar to each other. The generally accepted distinction between them is this:

- A Lead is a person's name and contact information, plus their company name. Although contact information has been verified, as well as some interest in purchasing, no specific sales Opportunity has been identified for this Lead.
- An Opportunity is just a record of the chance that you might make a sale to an Account, the size of the sale involved, the time frame in which the sale might happen, and details of where you are in the sales process, and the likelihood of closing the sale.

Note: When you have been in touch with the Lead and confirmed that they do have a genuine and qualified interest (they have a real business problem, and the money to fix it, and you're talking to someone who has the power to do so) in making a specific purchase, you convert the Lead into a Contact and an Account, plus an Opportunity. You also convert the Lead when they ask for a Quote, as both Quotes and Opportunities require an Account to reference.

Note: There is actually a stage before Leads, known as Targets (also often known as Prospects). These are usually names you have purchased on a list, or other low-quality source. Once the contact information and some interest has been established, they are usually converted to Leads. The main sales force generally becomes involved with them only once they become Leads.

In CRM terms, the process of selling goods and services to your customers comes down to a series of steps that look something like this:

1. Acquiring and tracking Leads;
2. Identifying specific sales opportunities with those Leads;
3. Quantifying those sales opportunities, and creating Accounts, Contacts and Opportunities within the system;
4. Aggregating all Opportunities together into a sales pipeline to see the big picture; and
5. Closing the Opportunities as sales.

By having an automated system that remembers all your Leads, can convert them into Opportunities once qualified, can add them all up to show a sales pipeline, and can accumulate a history of Account activities, your business gains three big improvements.

- You can now see how business is shaping up over the next couple of months in a more tangible and quantifiable way than ever before. The sales pipeline is your distant early warning system – it shows you when business levels are falling off, or growing faster than anticipated. In a smaller business it is your best friend when it comes to business planning, giving you a more detailed and distant view into the future, helping you to make appropriate staffing and expenditure decisions.
- All your Leads, Opportunities, and Account history are now formally recorded in a central system that the business owns. Your vulnerability to threats from sales personnel, or to the sudden defection of sales personnel, is much reduced. If a sales person leaves the organization, you still have all the Leads and Opportunities the business paid to develop, and the Account history needed to help a new sales person take over the Account quickly and effectively.

- The sales person on an Account is not the only person in the organization with access to details of activity history. Accounting and service personnel who have direct customer contact can now base their decisions about grey-area judgment calls in the Account on hard information from the Account history.

When a CRM system is first adopted, there may be many Leads sitting in the inboxes of various sales people. All these Leads need to be harvested and input to the CRM so they can be tracked. Then on an ongoing basis, all new Leads need to be entered into the system, and then assigned to a sales person, ensuring they will be tracked.

Let's type one in for ourselves now to get familiar with the process. Click on the Leads tab, and then on the *Create New Lead* shortcut on the left hand side of the screen. Notice, by the way, that there are shortcuts for importing Leads in bulk, and for creating a Lead from a vCard (an electronic business card, such as you may save from Outlook or Apple Contacts).

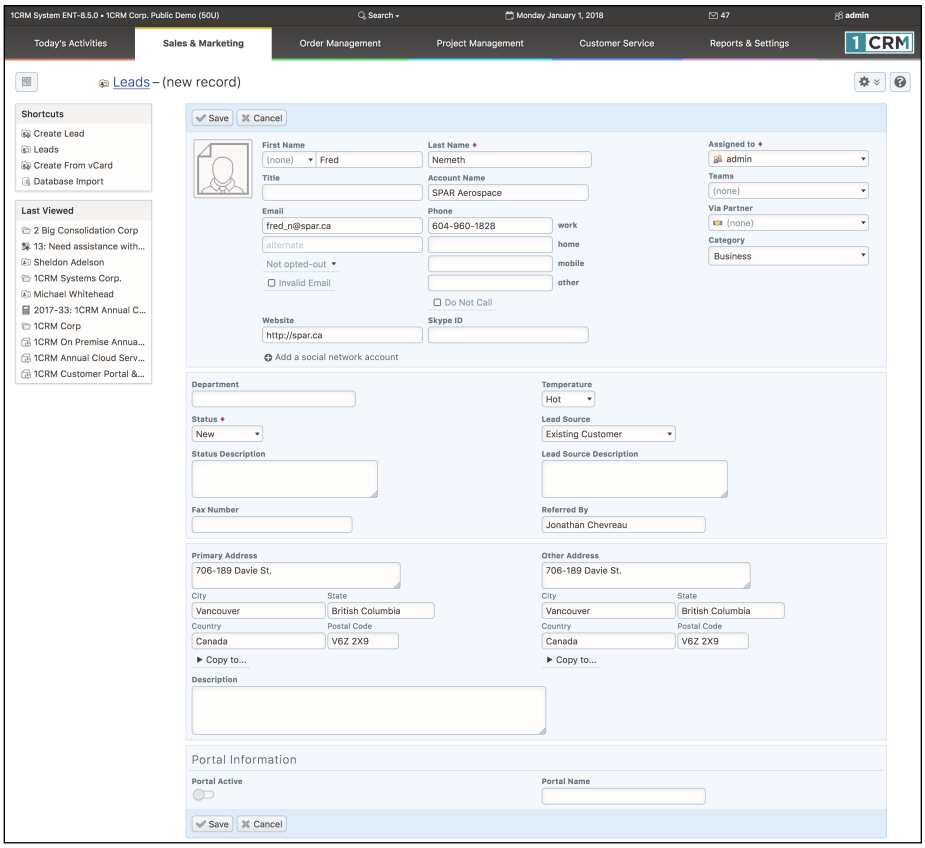


Figure 37: Lead Edit View: Data Entry Screen

Using the screen pictured above, enter the data for our new Lead, and click on the *Save* button. You now see the Lead detail view, with its main panel, and sub-panels for open activities and history. These sub-panels will let you track what your sales people are doing with the Leads you pass them.

One key field on each Lead is the *Status* field. It is set to *New* when a lead is first entered, and then to *Assigned* when the Lead is assigned to a particular sales person. It becomes *Converted* if the Lead is converted into a Contact (and generally an Account and an Opportunity). Another key field is the *Lead Source*. Between these two fields you can track what proportion of Leads that you get are converted into Opportunities (and/or sales) - and how that proportion varies according to the source of the Lead. Gaining empirical knowledge that identifies your most effective and successful Lead sources is a key business enabler.

To continue our worked example of the life cycle of a Lead, let's imagine that you call up the Lead above, and after talking with him for a bit, decide that SPAR Aerospace is a genuine potential new Account for you, and that the Lead with Fred Nemeth should be converted to an Account because there is a real Opportunity you need to document. At the top of the Lead detail view screen is a *Convert* button, with a *Convert to Contact* option. Click on it now, and you will see a screen like this:

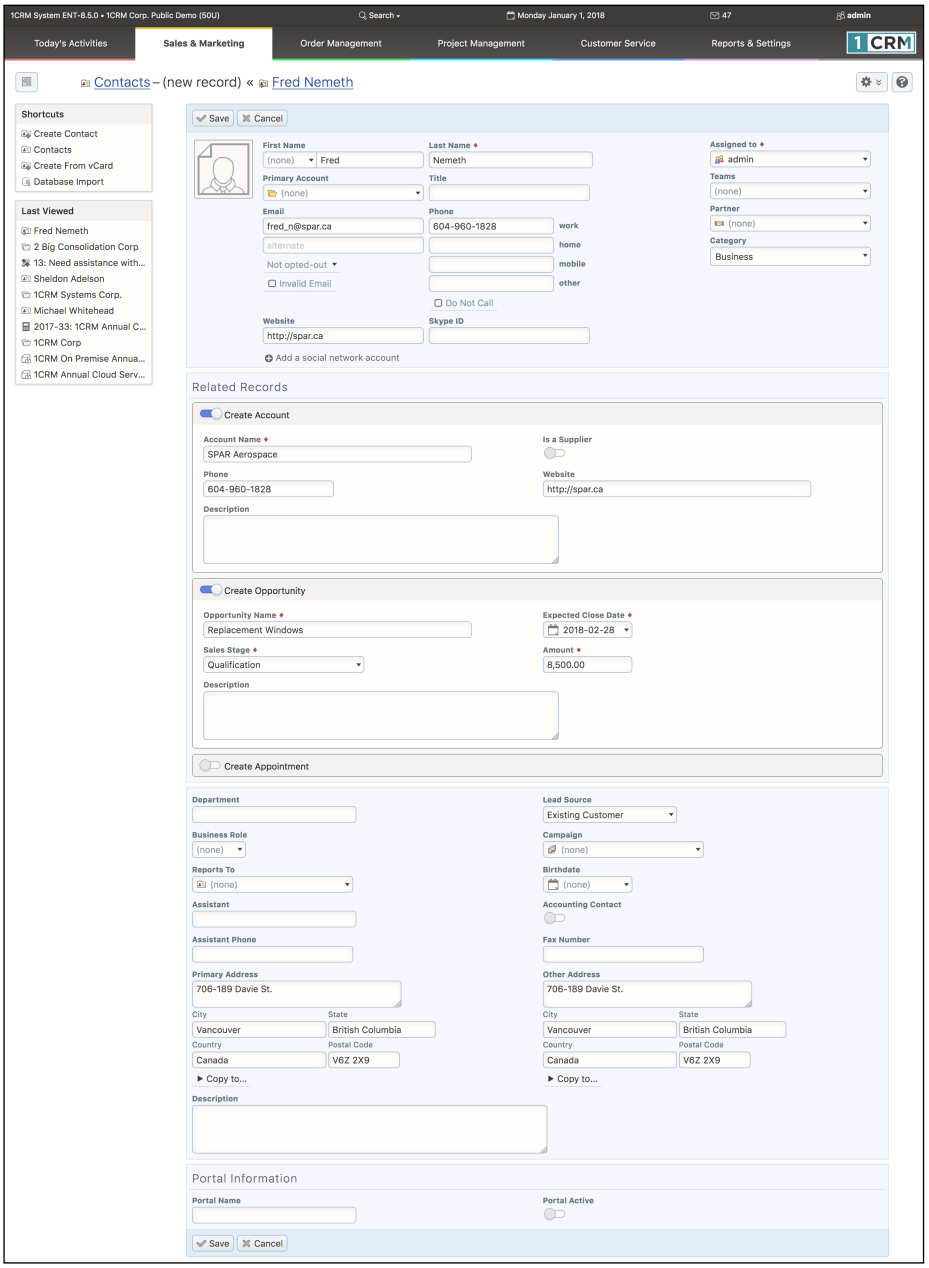


Figure 38: Lead Conversion Screen

As you can see, converting the Lead basically turns the Lead into a Contact, and optionally will also create an Account, an Opportunity, and even an Appointment. In the Related Records sub-panel, check *Create Account* (it is checked by default if the lead had an Account name), *Create Opportunity*, and *Create Appointment* if you want to generate those items of information as well. You can even create a Note or Attachment (uploaded file, such as a Microsoft Word or Excel file) to be linked to the Account record.

Based on your imaginary conversation with Fred, we have chosen to click on the *Create Opportunity* box, and enter data for an Opportunity to sell some replacement windows. Note that you must put in an amount for the Opportunity, and an expected close date. When you are done, click on the *Save* button to save all the new information records at once. You see the Lead detail view for the converted Lead, and near the top of that screen are links to the resulting Contact, Account and Opportunity. Click on the link for the newly created Account, Spar Aerospace.

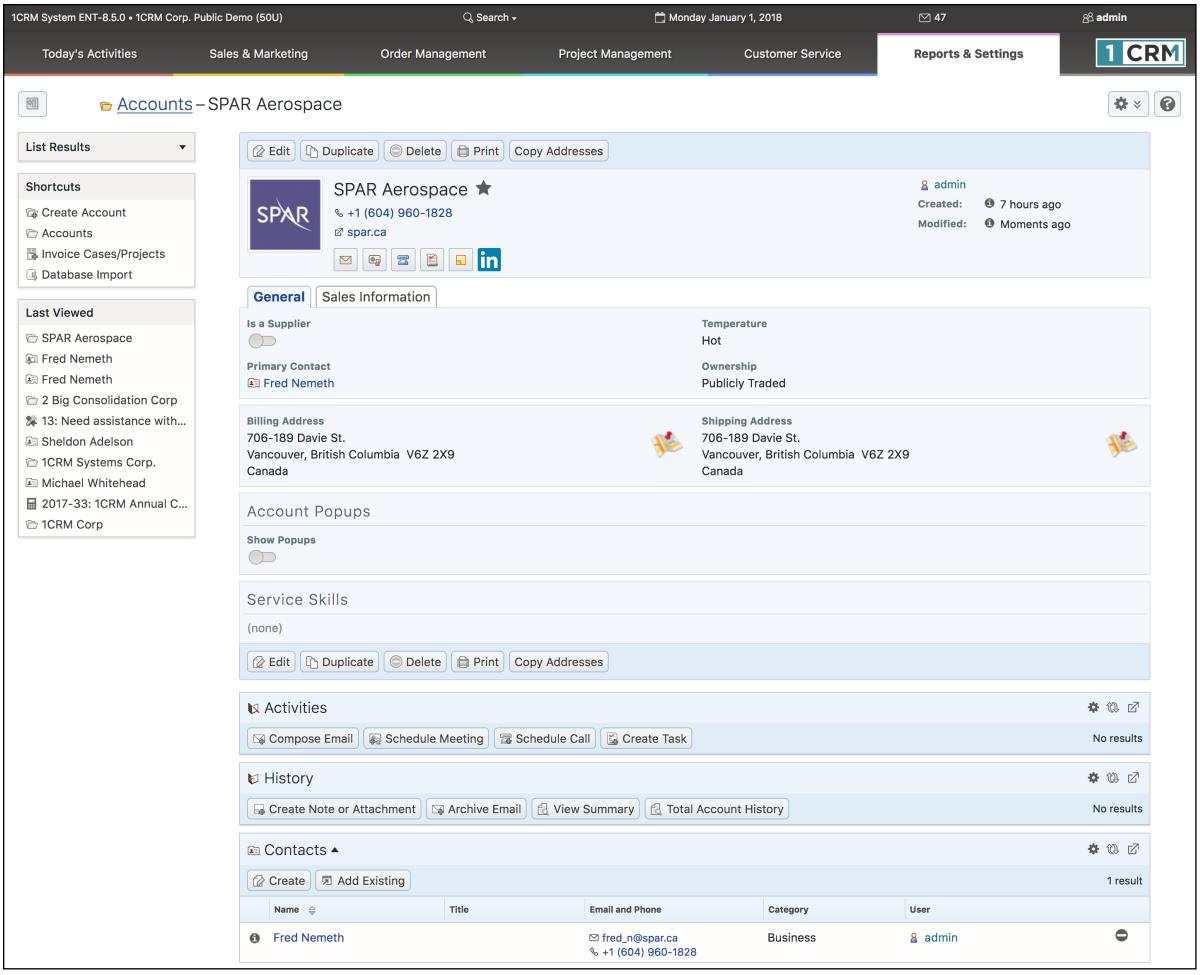


Figure 39: New Account, with Linked Contact

Notice that in addition to the Account (with company logo and LinkedIn profile we also added) and linked Contact that you see in the figure above, if you click on the *Sales Information* tab at the top, you will see the original Lead, plus an Opportunity linked to that Account. Again, just practice navigation a little. Click on the Opportunity. The resulting screen also shows the Contact. Click on the Contact. That screen also shows the Account. Click on the Account. We're back where we started. This is the joy of CRM – everything is related, and from one small item of information, you can link to volumes of Account history, Contact history, related Contacts, and related Opportunities or Leads.

3.7 CRM Workflow Basics III: The Sales Pipeline

Now that we have looked at creating Accounts, Contacts and Leads, plus converting Leads into Contacts and Opportunities and Accounts, we have all of the capabilities we need to start assembling a sales pipeline. Now – click on the Opportunities tab to see a list of all the Opportunities in our demonstration set of data. You should see a screen like this:

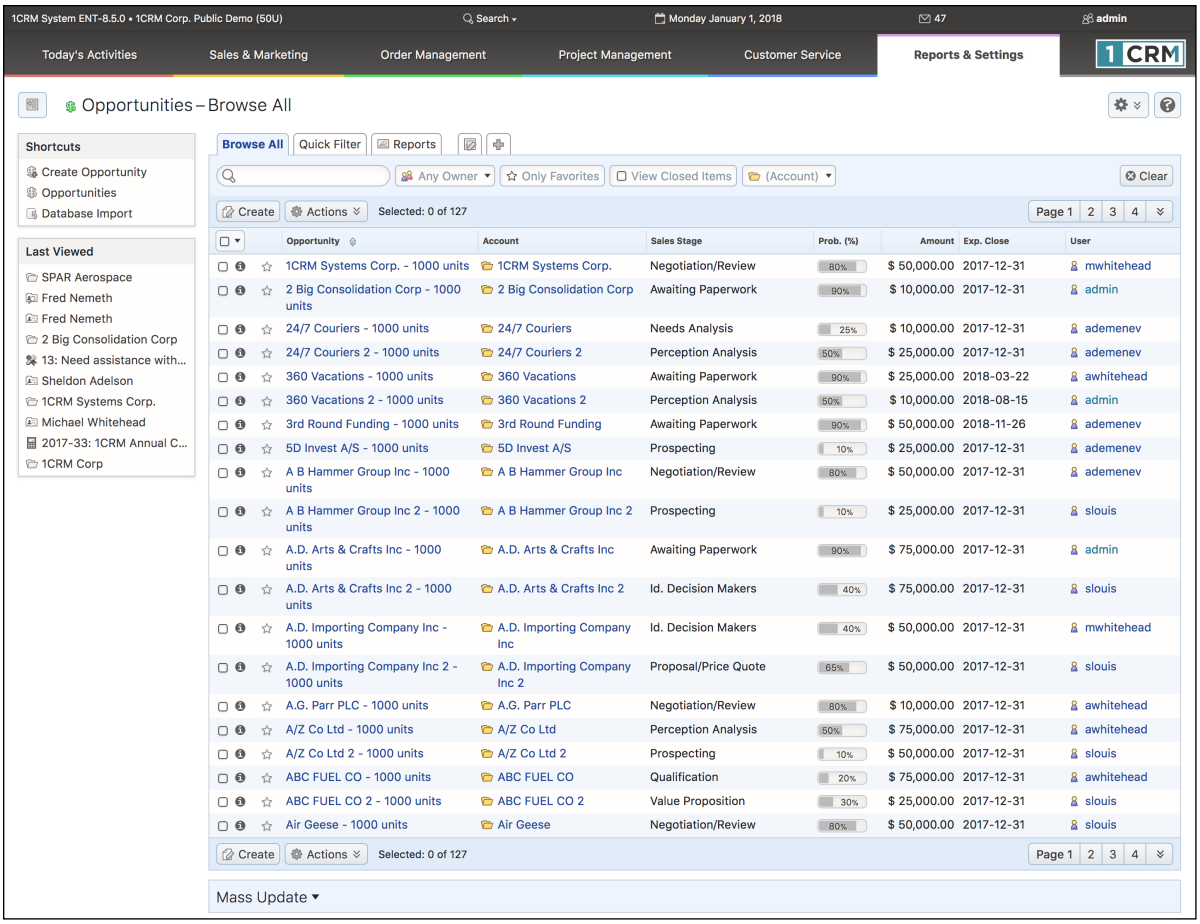


Figure 40: Opportunities List View

Clearly being able to see all the Opportunities we have identified for future business is very useful. But there are drawbacks. We can't see all of the Opportunities on this screen – only 20 of the 127 in the system. We have to page back and forth to see them all. As well, we see an estimated value for each Opportunity, an estimated close date for the business, the Sales Stage to indicate where we are in the sales process for each Opportunity, and the percentage probability of closing the sale, but we see no automatic totalling of the Opportunities. As well, we might like to see a total of the Opportunities weighted by the percentage probability of closing them – to gain a more realistic expectation of future sales.

First – let's have a more detailed look at an Opportunity, to understand what information is kept for an Opportunity. We generated an Opportunity in the last section, but without actually using the Opportunity edit view screen. Click on the first Opportunity listed to see an Opportunity detail view screen, and then click on the *Edit* button to go to the edit view. You should see a screen like this:

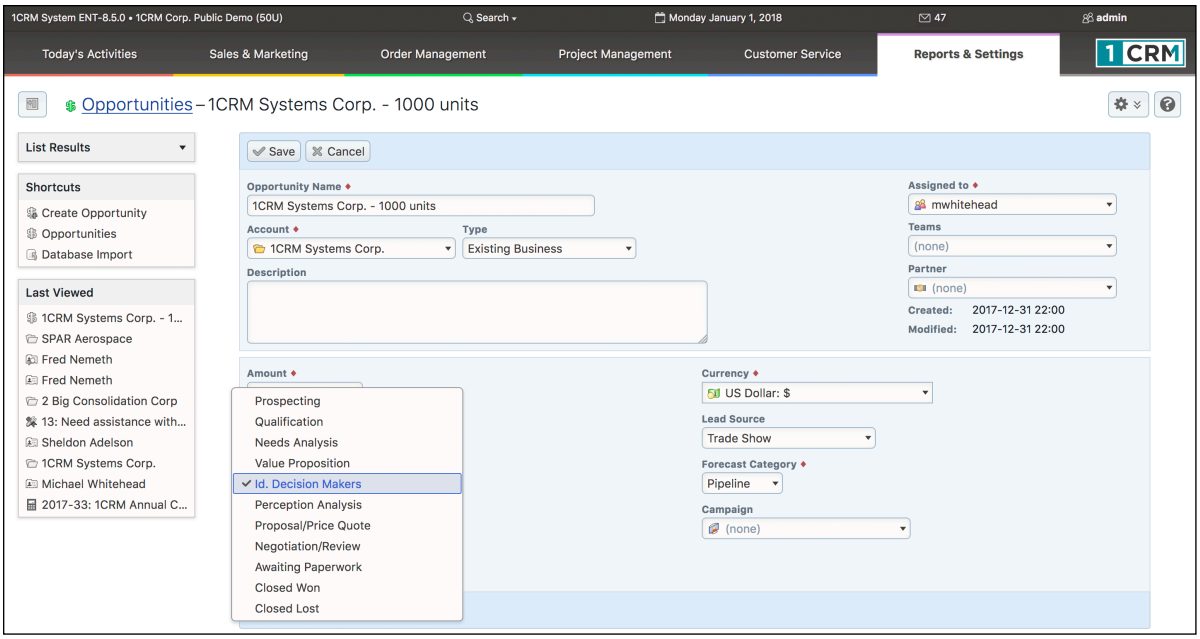


Figure 41: Opportunity Edit View

One key attribute of an Opportunity is the *Sales Stage*. In the screen above you can see the dropdown box for *Sales Stage* with all the options visible. (These options can be customized if they don't match how you do business, of course.)

Other important information contained in an Opportunity is the *Expected Close Date* for the business, the *Next Step* to close the business, the percentage *Probability* of closing the business, the *Lead Source* for this Opportunity, and the *Type* of business (new or existing business).

OK – we're done with this Opportunity edit view. Click on the *Cancel* button to exit the screen.

As useful as the Opportunities list view is, there are clearly a number of views and what-if questions we would love to apply to our Opportunity data that are not really addressed by the list view:

- What is our best lead source?
- What is our total sales pipeline?
- How does it break down by month for estimated close dates?
- Are most of our opportunities in early, or more advanced stages of the sales process?
- Which sales people are being most successful at the moment?

3.7.1 The Sales Charts Dashboard

To address the need to answer questions like this, higher quality CRMs have graphical charts which show visual breakdowns of Opportunity data, totalling them overall, and sub-totalling by key indicators such as Sales Stage, Lead Source, and account representative.

Within 1CRM any chart may be added onto any dashboard page. The complete set of Opportunity related charts is shown by default on the *Sales Charts Dashboard*. Click on it now, and you should see a screen like this:

Figure 42: Sales Charts Dashboard

The six charts related to sales and Opportunities are:

- Fiscal Year Booked Sales; (not shown above)
- Weighted & Gross Opportunities by Month;
- Pipeline by Sales Stage;
- Opportunities by Lead Source by Outcome;
- Pipeline by Month by Outcome; and
- All Opportunities by Lead Source.

The *Fiscal Year Booked Sales* chart is pretty easy to understand.

The *Weighted and Gross Opportunities* by Month chart is a handy one, showing you visually the total value of all Opportunities expected to close in each month, and then the total of those same Opportunities after they have been weighted by their *Probability* percentage.

The *Pipeline by Sales Stage* chart is also available as a variant - *My Opportunities* - except that this variant shows only your own Opportunity data, not those for the entire organization. This chart is usually used by the owner of a small business, or the sales manager, to gain an overall sense of the maturity of the sales pipeline. He can answer the question – "Is there enough future business far enough along to close in the near future to meet sales targets?" As well, the stacked bar chart presentation gives a visual indication of which sales people have the greatest dollar value of Opportunities, and if some of them have an undue proportion of their Opportunities in the early stages. Many sales managers use this chart to watch out for any sales person who may be bluffing about how much business he has coming in – as this normally shows up by a lot of Opportunities, most of which are in the early sales stages.

The *Opportunities by Lead Source by Outcome* chart is handy for giving you a quick visual indicator of which Lead Sources are producing the greatest value of Opportunities, and the colour-coded stacked bars show you if some Lead Sources are especially good or bad at being converted into sales. It can show you the most effective advertising medium for your business - TV, Radio or Internet (Adwords for example).

The *Pipeline by Month by Outcome* chart shows how your next few months of sales are shaping up, and the stacked bars break down the Opportunities according to if their Sales Stage is *Closed Won*, *Closed Lost*, or anything else (meaning the Opportunity has its expected close date in the month shown, but it has still yet to close in favour of our business, or a competitor).

The *All Opportunities by Lead Source* chart provides a useful pie chart visualization of all Opportunities, breaking them down by Lead Source.

Each of these charts has an *Edit* control at the top right which allows you to set a few filters on the data driving the chart. Opportunities shown on the charts can be limited to those from specific sales people, to Opportunities due to close in specific time frames, or to those Opportunities with specific Sales Stages, or from specific Lead Sources.

Each chart also provides you with the ability to mouse over areas of interest, to see more information. If on the *Pipeline by Sales Stage* chart you mouse over those Leads in the *Prospecting* stage, the area under the chart will show amplifying information about how many Opportunities there are in this stage, and their total value.

Lastly, and most usefully, each chart offers a facility known as drilldown. If you mouse over the opportunities at the *Prospecting* stage again, and this time click on the bar in the chart that represents those Opportunities, the system will bring up the Opportunities list view screen, automatically filtered to show exactly those Opportunities that are behind the chart's graphical

representation of the data. While some people understand information more easily from a graphic, and some from numbers and text, this drilldown system offers the best of both worlds.

Taken together, these capabilities of the Sales Charts dashboard should significantly improve your ability to know what to expect to happen in sales for the next few months, to understand what lead generation strategies are working most effectively for you, and to root out problems with sales people who may habitually overstate the value or probability of their sales pipeline or repeatedly fail to close business by forecast dates.

For the sales people themselves, this tool can act as a motivator to generate new Opportunities, or to close business which is visibly lagging against its forecast dates, as well as a handy way to organize the information on their Opportunities.

3.8 CRM Workflow Basics IV: Calendaring

Being in business is a large series of small events. Meetings, telephone calls, notes, emails, or reminders to revisit an issue in a few months. A very important aspect of any CRM is the ability to schedule these activities, and to associate them with the accounts and contacts they involve.

In 1CRM, there is a full group calendaring system, capable of scheduling all these activities, and helping staff schedule meetings or telephone calls at times when people are free to attend them. It will also book these meetings and calls into the calendars of all those invited to take part in them.

Click on the *Calendar* tab now (or simply on today's date: see Calendar Information (7) on Figures 15-18), and you should see a screen like this:

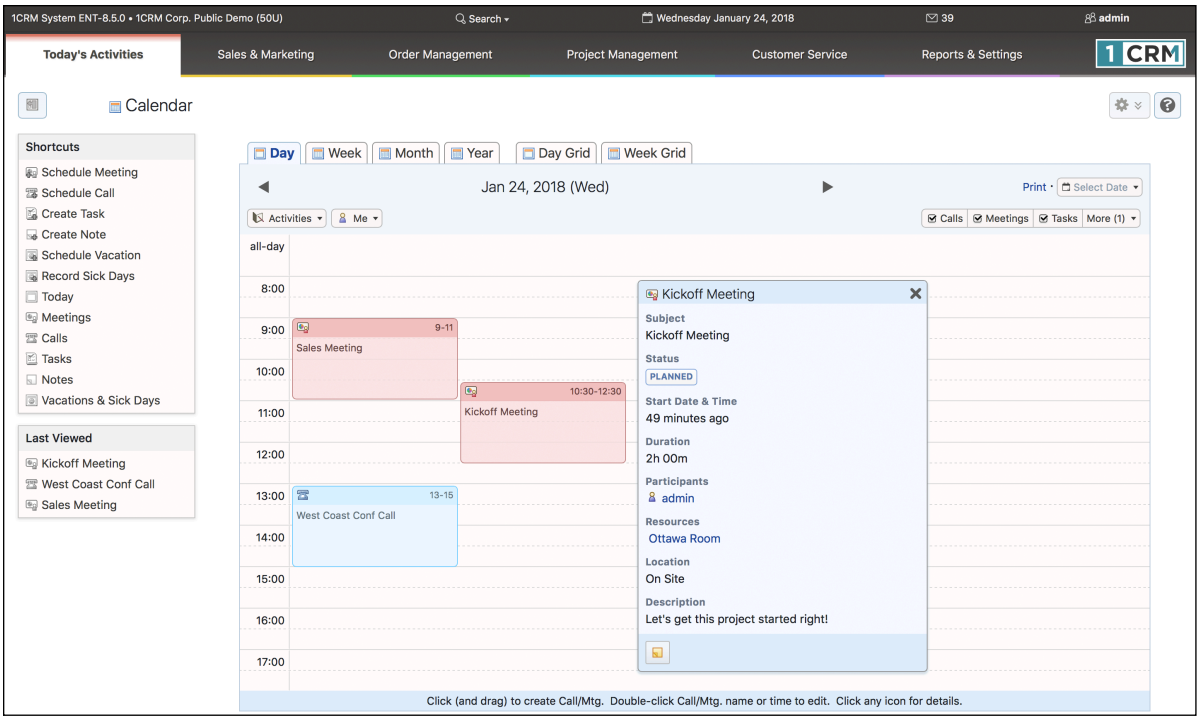


Figure 43: Calendar – Day View

This is the default view for the calendar tab – the day view for today's date. As you can see, there are tabs to see views for the current week, month, or even year. And within each of those views, there are nudge controls to go to the previous or next day, week, month or year.

Take a moment right now to click on the week, month and year buttons, to get familiar with the display layouts and the navigation buttons offered by the application. On each of those views, notice that you can click on the *Today* or *Select Date* links to see the day view of calendar info for that date.

To see how the calendar works, let's make ourselves an appointment for tomorrow at 11AM, to meet with Fred Nemeth of SPAR Aerospace, to discuss their plans for renovations. From the current screen, click on the arrow button to move to tomorrow. When you see the activities for that date, click in the area of the calendar display where you might naturally write appointments. Click at the 11:00 time, and drag downwards to 12:30, then release the mouse button. You will see a little box pop up that let's you quickly schedule a Call or Meeting - with *Start Date & Time* and *Duration* already set for you. In this popup the default is to create a Meeting - to create a Call just click on *Switch to Call*

button. Now enter a *Subject* for the meeting, click on *Add Participants* and lookup Mr. Nemeth to add him to the meeting, add him as a related Contact (which sets the related Account), then click *Save*.

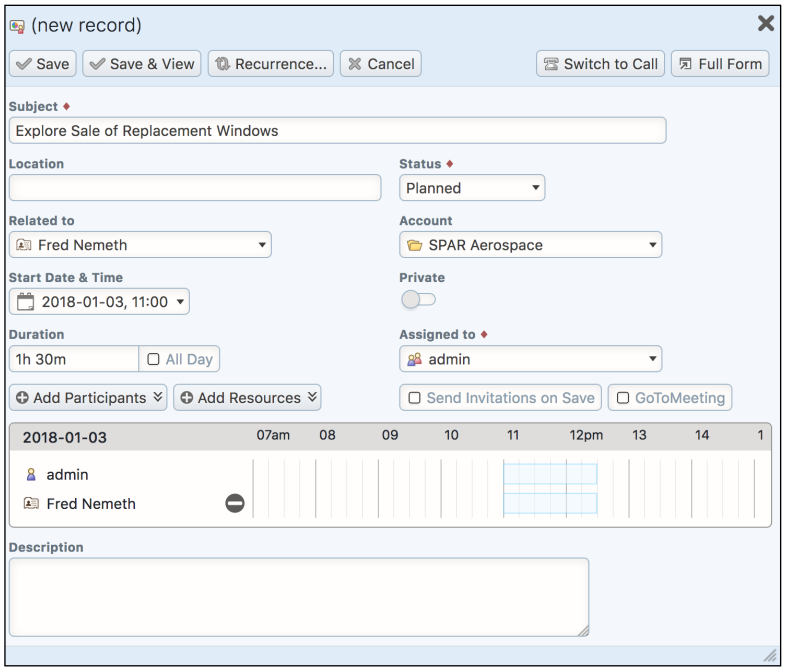


Figure 44: Scheduling a Meeting

Once you have done that, you will now see the calendar again, but with the meeting shown on it - something like this:

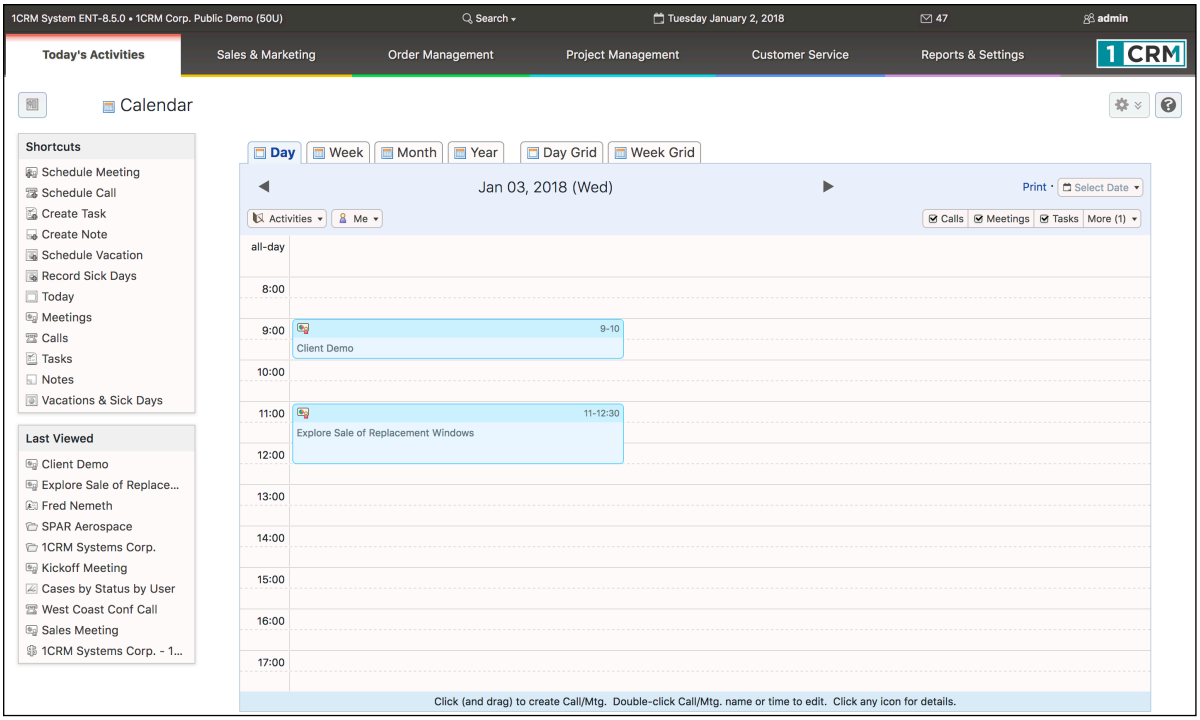


Figure 45: New Meeting Displayed on Calendar

From the screen shown in the Figure above, you may hover your cursor above any Call or Meeting such as *Explore Sale of Replacement Windows*. This will show the meeting details we see below.

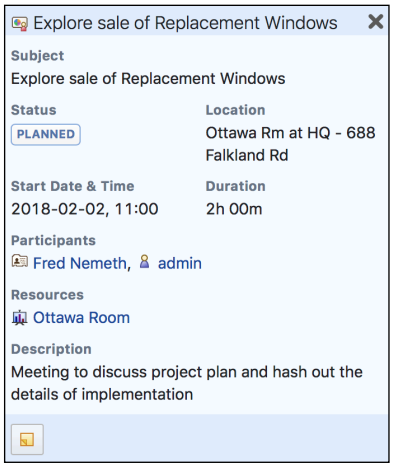


Figure 46: Meeting Details

To invite more attendees, either employees from your company (defined as users within the CRM system) or customers (from contact data within the CRM), you just double click on the meeting time or subject within the appointment as shown on the calendar, and the same edit call/meeting box comes up that is shown in Figure 44.

Again, the power of the CRM to connect all your customer information together comes into play here. Click on the link on Fred Nemeth's name in the Meeting Details box when you have it displayed. You see the detail screen for his Contact record, with the linked Account, Meeting, Lead and Opportunity. Now click on the *Subject* of that Meeting, and you go to the detail view for the Meeting.

This gives you an initial overview of the calendaring capabilities within 1CRM. In the next section we will learn more about the various activities that users of the system can create and track – and we will learn more about the calendar then as well.

3.9 CRM Workflow Basics V: Sales Activities

While we learned about the calendar in the previous section, we also learned something about the activities that may be defined and tracked within 1CRM. Let's now look at those activities in more detail.

Within 1CRM there are five different types of activities:

- Meetings
- Calls
- Tasks
- Notes
- Emails

Within the *Today's Activities* tab group all five of these activities are available as modules. Activities are important within a CRM for two different reasons. First, they are important to help everyone schedule their activities, and remind them of when they are coming up. Dashboard pages can include dashlets to display *My Meetings*, *My Calls*, *My Open Tasks* and *My Inbox: Unread Emails* to remind

users of approaching appointments and deadlines. By default these are all included on the *Action Items* dashboard within the *Today's Activities* tab group. There is also a Calendar dashlet that offers day, week, month and year layouts.

Secondly, it is very important that each user's activities are scheduled within the CRM (as opposed to Outlook or another system) as when the activities have been completed, they still perform an extremely valuable function by adding to the activity history for Contacts and Accounts. This activity history is vital to assist sales managers and general managers, as well as any sales personnel who inherit Accounts from a previous sales person, in gaining a quick and comprehensive understanding of the current status of their Accounts.

Let's look at the activities for SPAR Aerospace in a little more detail. Click on the last viewed entry for this account to get you there quickly – or click on the Account tab and then look them up. The top part of the screen should resemble this (we have added a bit more data we'll explain soon):

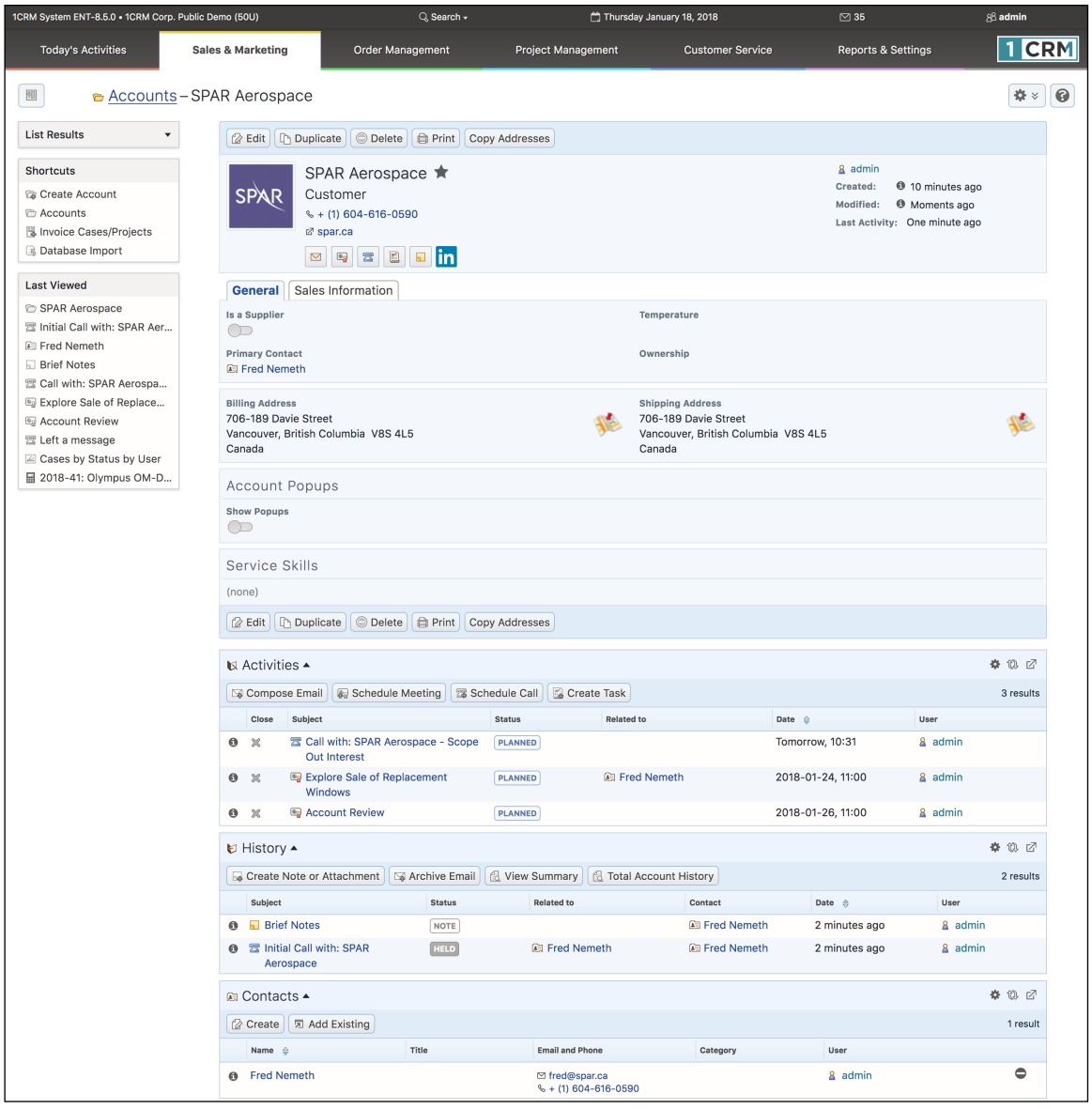


Figure 47: Account Activity History

Each activity has a small icon to the left showing if it is a Meeting, Call, Note, Email, or Task. In the Open Activities sub-panel, you will only ever see Meetings, Calls, and Tasks. Emails and Notes, as well as closed Meetings, Calls and Tasks, are all listed under the History sub-panel.

- We see our upcoming Meeting listed in Activities, with Fred Nemeth linked to it, and a status showing of *Planned*. To illustrate how Account history works, let's pretend we have held that Meeting, and click on the close icon for that Meeting – shown as an ✖. You get a chance to add any notes you might like to the record of the Meeting, and then click on *Save*. Now the Meeting is shown under the history sub-panel, with a status of *Held*.

After a few months of operation for your CRM, with everyone in the company scheduling their activities in the system, and gradually accumulating activity history for all Accounts, your business will have acquired a remarkably valuable resource it has never had – a history for every Account and Contact, that is searchable at any time of day from any device in the world with a browser, and won't go away when a sales person leaves the firm.

3.9.1 Creating a Note

Let's explore some more types of activities, starting with Notes.

Imagine that when we met with SPAR Aerospace they discussed a more significant renovation of their premises – including new doors, windows and carpets. Fred Nemeth actually stepped through a PowerPoint slide show of the renovations that had artist's drawings of the resulting building, and a breakdown of the numbers and sizes of new doors and windows, and square footage of the new carpets needed.

To make sure that anyone who has contact with this Account has access to this detailed information, let's make a Note on the detail view of this Account, and attach the PowerPoint slide show. In the history sub-panel, click on the *Create Note or Attachment* button. The Account name is pre-filled. Select the Contact, enter a *Subject* for the Note, and some documentation in the Note field for people reading the Note, and then click on the *Browse* button to select a file to upload as an attachment to the note. Once you have selected a file, click on the *Save* button. The file will be uploaded, and the Note will be saved, producing a screen which resembles this:

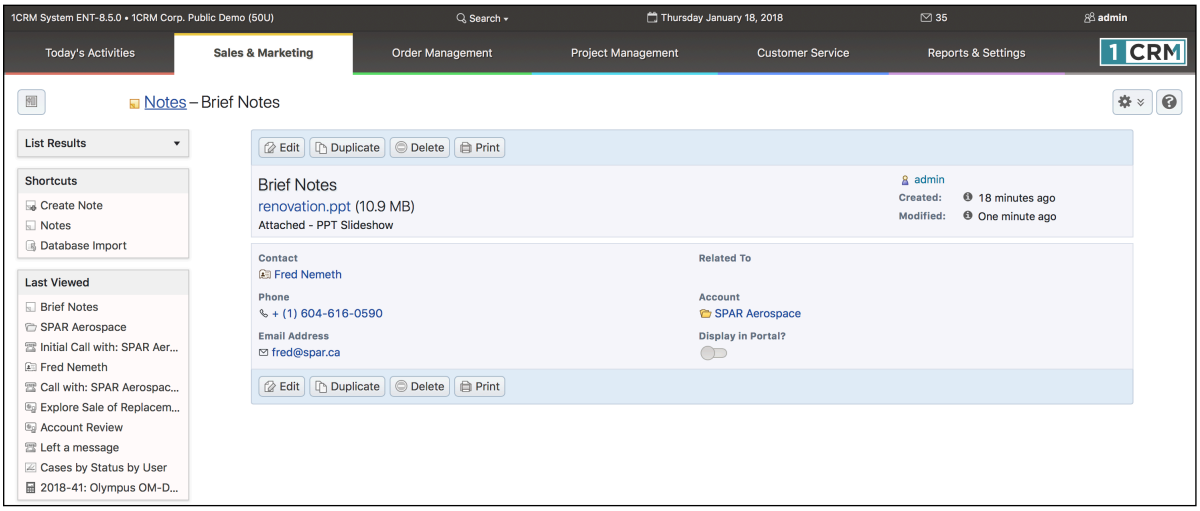


Figure 48: Note with Attachment

Click on the *Account* link go back to the history sub-panel of the SPAR Aerospace detail view, and you can see the new Note now included as part of the Account history.

3.9.2 Creating a Task

Now that we have had a Meeting, and added Notes to the Account history, we really need to assign ourselves a Task to prepare a quotation for Fred at SPAR Aerospace. Let's do that now. From the Account detail screen, go to the Open Activities sub-panel and click on the *Create Task* button. You will see the Task edit popup, which looks like this:

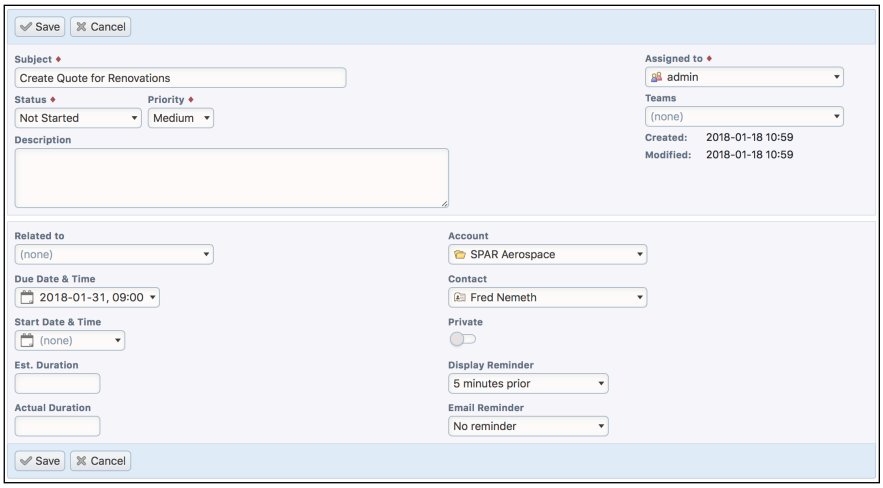


Figure 49: Task Edit View

As shown above, type in a subject, then select a *Due Date* and time using the little calendar pop-up to select a date. Within the calendar pop-up you can move forward or backward through the calendar by month or year with controls provided, and then click on the day you want in order to select it.

You can also set the *Priority* of the Task, assign it a Status (*Not Started*, *In Progress*, *Completed*, *Pending Input*, or *Deferred*) and enter a *Description* for the Task.

Press the *Save* button once you are done and you're back on the Account detail view for SPAR Aerospace, with a new Task in the Open Activities sub-panel. Now click on the Today's Activities tab, and you should see this Task listed in your *My Open Tasks* dashlet. As well, if you go to the Tasks list view you should see all your Tasks listed out, including this one.

3.9.3 Scheduling a Call or Meeting, Calling with Skype

A few days pass, and you complete your proposal for Fred Nemeth before the Due Date you set yourself. You then mark the Task as *Completed*, and need to email the proposal to Fred, and then call him to talk about it. You email the proposal to Fred (see the section on Managing Emails coming up next), asking him when would be a good time for a call. He mails back with a time and date, and you need to book that Call into your calendar. You go to the Activities sub-panel of the Contact record detail view for Fred, and then click on the *Schedule Call* button - then click on *Full Form* to see the full Call edit view. You see a screen much like the Figure below.

You start entering the call by typing in a *Subject*, and then setting a *Start Date & Time* (using the little calendar pop-up). By creating the Call via the Contact record for Fred, it is already related to him - and it is already related to the SPAR Account as well. Then you look lower down on the screen, and realize you have a problem. The start and stop time for your Call are marked on the time line of your day. Unfortunately there is a blocked out segment of your day marking a pre-existing commitment, and this Call is on top of it. In this case you could email back to Fred and ask him if a little later at noon the same day would work for him.

Your CRM lets you book Calls and Meetings that involve multiple employees and customer Contacts by adding their names as *Participants* at the bottom of the screen. Enter their first or last name, look them up, and add them to the call or meeting. All employees will have their free/busy status displayed in the same way yours was above so you can see to avoid scheduling conflicts.

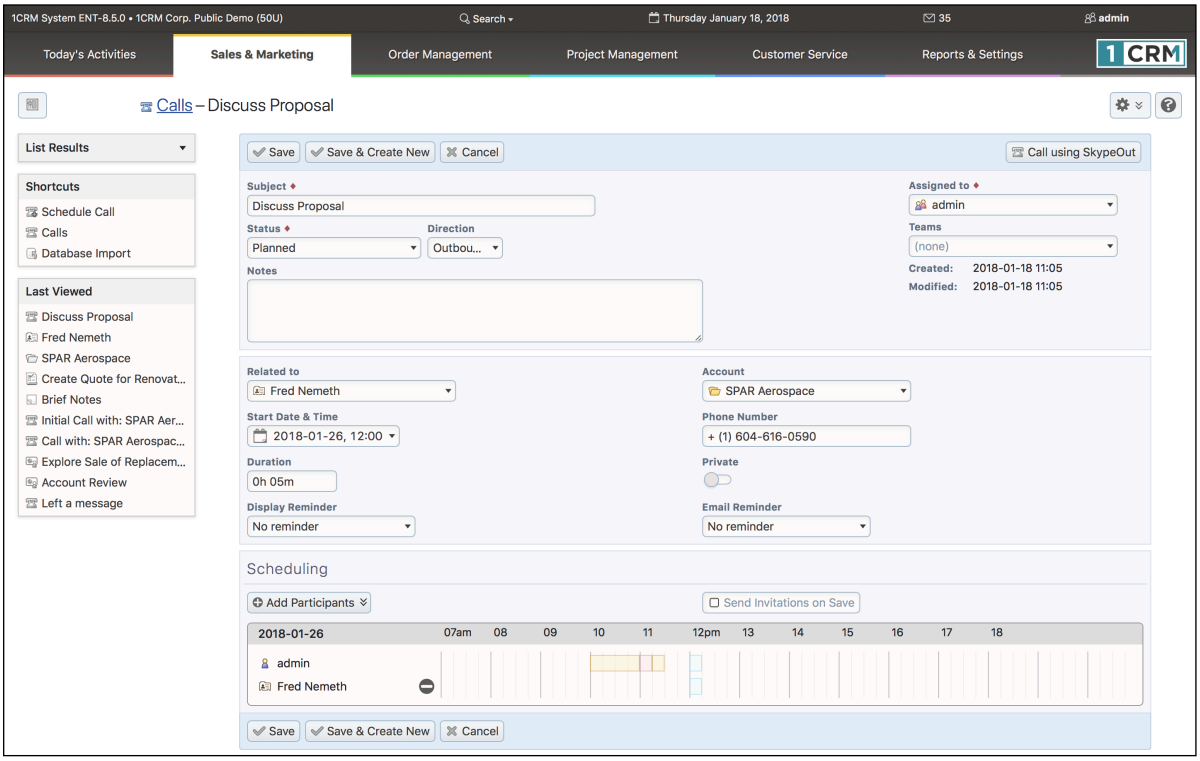


Figure 50: Schedule a Call

What's the point of adding customers as Invitees, if you can't see their calendar of commitments? Because the *Send Invitations on Save* checkbox lets you automatically email all attendees (employees or external Contacts) so they know about the Call or Meeting, and can accept it or reject it. As well, any employee invited to Calls or Meetings will see these activities scheduled on their Action Items screen, where they have controls to accept them, accept them tentatively, or decline them.

The following information is included in the email an invitee receives when the *Send Invitations on Save* checkbox is used:

- Who has issued the invitation?
- Is it for a Meeting or a Call?
- What is the subject of the Meeting or Call? (In this case it would show as 1CRM Call – Discuss Proposal.)
- What is the status of the Meeting or Call?
- Is there an associated Online Meeting session? (GotoMeeting, Microsoft Teams, Zoom …)
- When does it start, and what is the duration?

Then three links are provided, to enable the recipient of the email to accept, tentatively accept, or decline the invitation.

Note: All Contacts, Leads and Users in 1CRM can have a Skype ID. Hovering over a Skype ID offers the option to start a Skype Call, Skype Chat or Skype Video Chat.

Calling With Skype & the Call Timer:

When it comes time to make your call, if you like you can just click on the client's phone number as it is displayed anywhere in 1CRM, and the system will pop up a window to log the call. Just click on *Call using SkypeOut* to place the Call.

By default the system will use Skype to place the call right from your computer. Your system administrator has settings (*Admin - System Settings - Locale Settings*) that enable/disable call logging and SkypeOut calling, or select calling services other than Skype (e.g. RingCentral™ as discussed below).

When you *Save* the record of the Call the system will record:

- the Call Subject
- time and date the Call was made
- duration of the Call
- any notes you want to take from the Call
- the phone number called
- the customer Account related to the Call
- any Call relationships to other information in 1CRM
- Call Status - such as *Planned*, or *Held*

The moment you click on the *Call using SkypeOut* button to place your call, your Call Timer starts counting (it replaces the *Call using SkypeOut* button in the Call popup). Once your Call has been completed, or failed to connect, you can click on the Call Timer to stop the timer and automatically set the Call start time and duration.

Note: If you go to an existing Call detail view and click on the *Call using SkypeOut* button on that record, the process is very similar. However, when you click on the Call Timer to stop the timer the system will ask you if you want the Call start time and duration to be updated. If you confirm, these are set and Call Status is also set to *Held*.

3.9.4 Calling with RingCentral

In order to utilize the RIngCentral service in coordination with 1CRM, your administrator must first select RingCentral in *Admin - System Settings - Locale Settings - Telephony Integration*.

Your administrator must also perform the administrative function *Admin - Maintenance - Normalize Telephone Numbers*. This will ensure that all phone numbers entered into the system (or via imported data) prior to RingCentral integration being turned on will be properly formatted so that RingCentral can call them, and also recognize who is calling for incoming calls.

Next, each user planning to use RingCentral must go to the *My Account - Integration* tab - and edit the settings shown in the Figure below:

- Your *Direct Phone Number (**IMPORTANT NOTE:** For North America numbers, enter this in the form 16046160590 - with the 1 in front, then the area code then the 7-digit number, with no spaces, or dashes or parentheses.)*
- *Expand RingCentral Window on Incoming Call* (see section on Receiving RingCentral Calls)
- *Press 1 to Start Call* option (checkbox to Enable / Disable)

Your administrator should be able to provide your direct phone number.

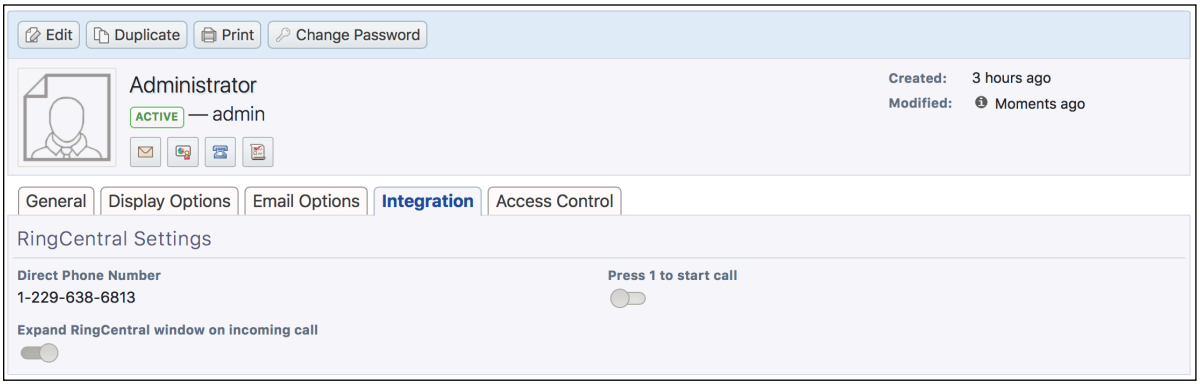


Figure 51: RingCentral Integration Settings

Once those settings are saved, you will see a small RingCentral icon at the bottom right corner of the 1CRM screen. You need to click on this icon to login and enable the 1CRM to RingCentral integration. When you first click on this icon it expands to display the *RingCentral Popup* window, and you will need to enter your RingCentral password, then click on *Login*. You will then see a list of recent calls, one per screen with pagination controls.

Figure 52: RingCentral - Minimized Icon

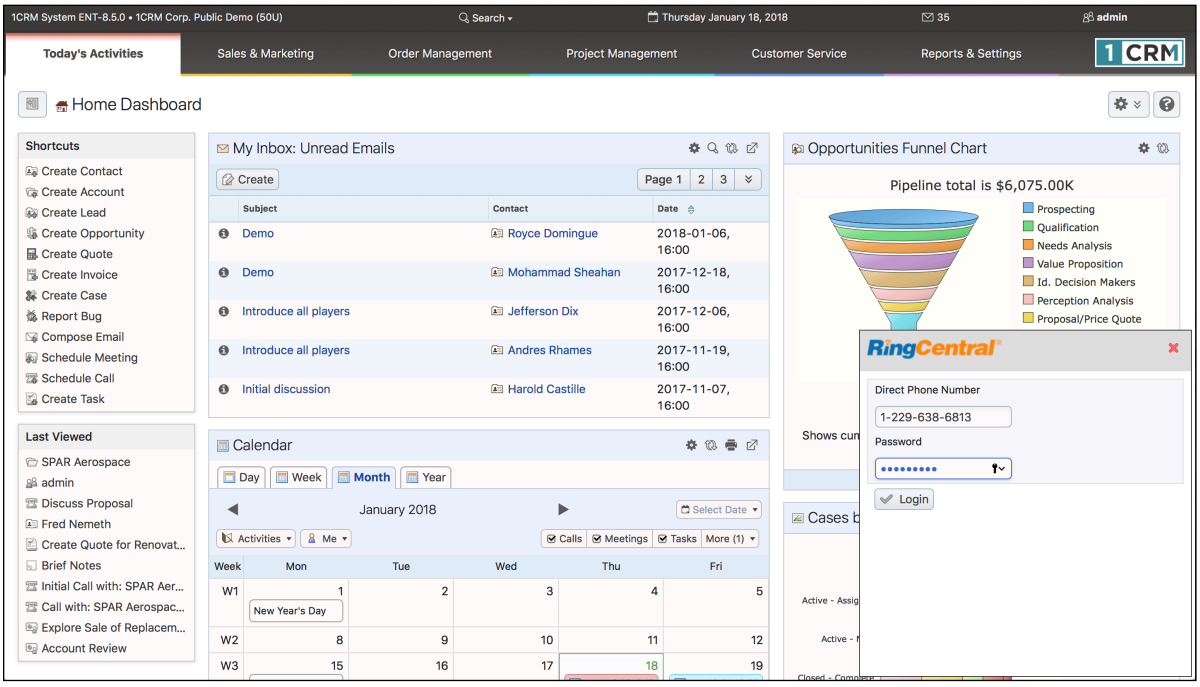


Figure 53: RingCentral Popup Window - Ready to Login

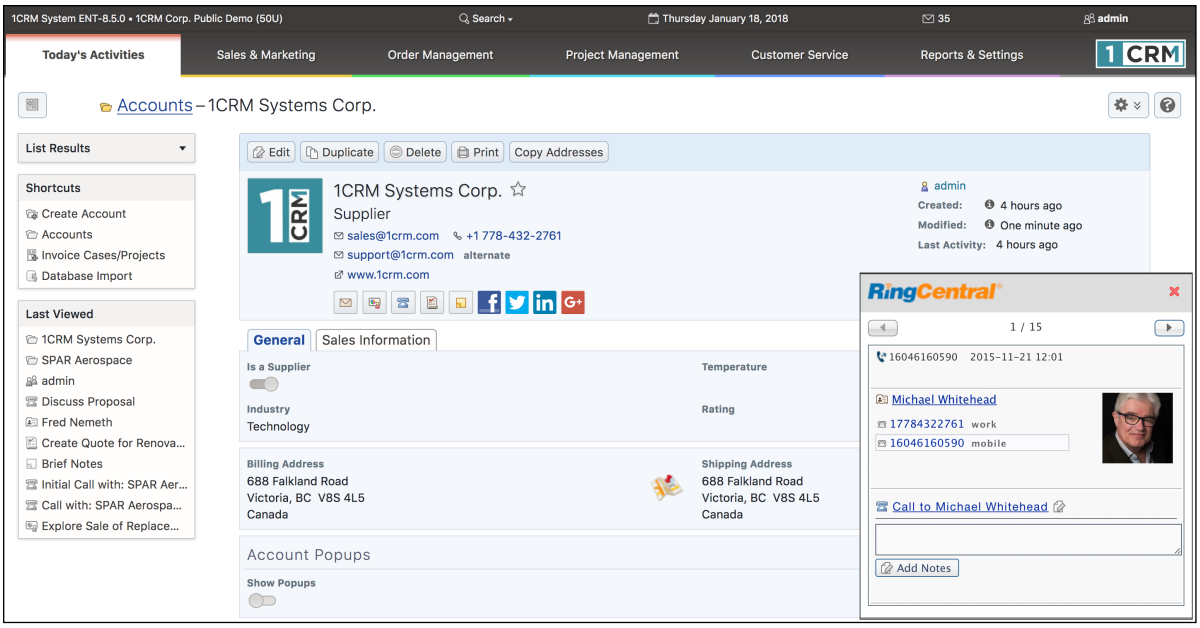


Figure 54: Account Detail View, with RingCentral Popup Showing Call Log

Now if you like, you can minimize the *RingCentral Popup* window by clicking in the grey area of the top bar (the red X will log you out). You now have 1CRM fully setup and working for use with RingCentral.

Next, you need to install the RingCentral *softphone* on the computer you are using to access 1CRM, or use a physical VOIP phone from RingCentral. You can download the RingCentral Desktop Apps for Mac or Windows here, and the Mobile Apps for iOS or Android here. Once you have a VOIP phone or App installed and running using the instructions provided by RIngCentral, you are ready to go!

Let's take a moment to study the details of the *RIngCentral Popup*:

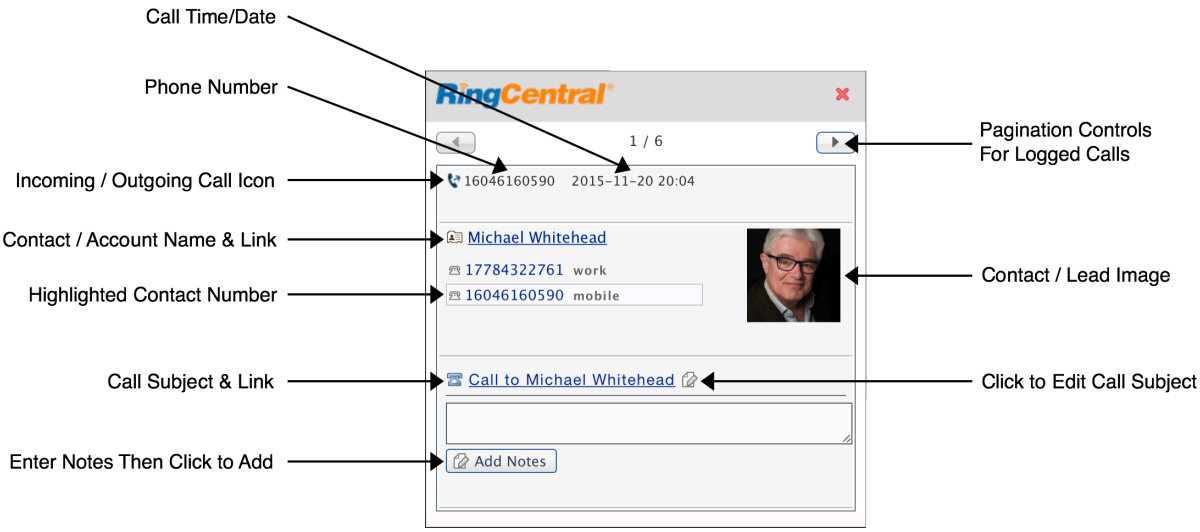


Figure 55: RingCentral Popup

Every time you receive or make a call using RingCentral it will be logged in the RingCentral Popup, and in your 1CRM system. As you can see above, as each call is logged in the RingCentral Popup a lot of handy information is displayed along with useful links to the related 1CRM data.

Now let's try it out. Just click on any phone number you see in 1CRM that has a hyperlink on it, such as the one shown for 1CRM Corp. in the Figure above. (Note: The 1CRM Call Logging window does not appear when logged in to RingCentral, as all RingCentral calls are logged automatically.)

The first time you do this you may be a bit surprised to see a RingCentral window (Figure 56) that seems to indicate someone is calling you!

This is due to the nature of how RingCentral makes calls - what is called a 2-leg process. When you tell RingCentral you want to call someone, what happens is that actually RingCentral calls you first. Once you answer (by clicking on the green *Answer* button as shown in the Figure below), it calls your desired contact (optionally after you press '1' to start the call), and then joins those two calls (two legs of the call) together.

One of the key advantages that this approach enables is that the person you are calling sees your company phone number as the incoming number, not your mobile number or the number wherever you may be.

Once your call ends, you will notice that it has been added to the call log you see in the RingCentral Status window, together with all the information on the related Contact, Lead or Account.

If you like, now you can enter some Notes in the *RingCentral Popup*, and click on *Add Notes*. The first line of text will be used as the subject for a new Note created and linked to the Call, and any other lines of text will be added into the Notes field of that new Note.

Calls logged by RIngCentral are automatically given the Subject of *Call to Contact*, or *Call From Contact* (or just the phone number if the caller is unknown). You can use the icon provided to edit the Call Subject if desired. The logged Calls also automatically include information on the Call date, time and duration, as well as Incoming or Outgoing direction.

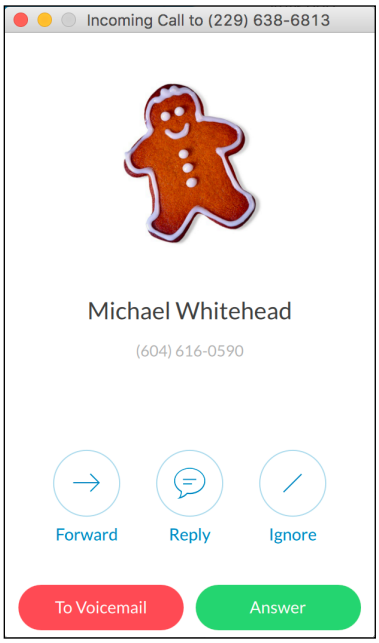


Figure 56: RingCentral Softphone Call Window

3.9.5 Receiving Calls with RingCentral

When receiving a call via RingCentral, if you have the RingCentral Popup window open it will show the details of the caller if the incoming phone number can be identified in the 1CRM system. 1CRM data for Contacts, Accounts and Leads will be searched for matches to the incoming phone number, in that order. (This ensures that if both Contact and Lead records exist in the system with the same phone number, that the Contact will be matched rather than the Lead.)

Each incoming call will automatically be logged to 1CRM, and linked to any related Contact, Account or Lead if one can be identified. Similarly the Call record in 1CRM will automatically show the Call time, date and duration.

Note: There is also a user configuration option to auto-expand the RingCentral Popup window on receipt of an incoming call.

If the incoming call is from an unknown number you will see displayed in the RIngCentral Popup this type of information:

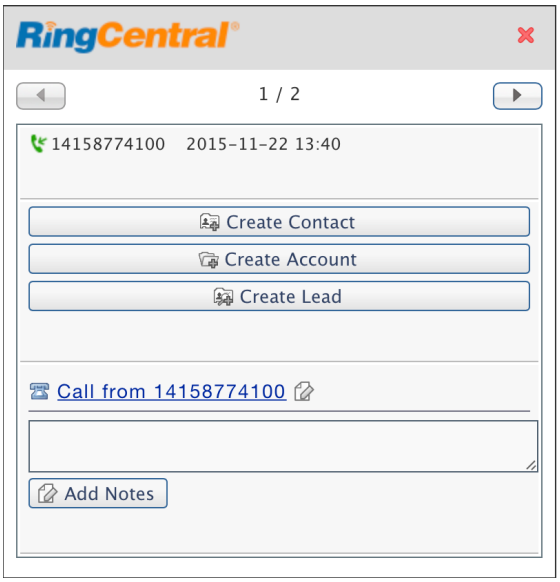


Figure 57: RingCentral Popup - Unknown Number

The buttons available here allow you to create a new Lead, Contact or Account in the 1CRM system using the caller's phone number, as well as the RingCentral Popup displaying some of the other information and links described above.

3.9.6 Managing Emails

In the last section, when you needed to email Fred Nemeth with the proposal, we mentioned you would be able to do the whole thing within 1CRM. This is because 1CRM includes its own ability to send outgoing emails, and then automatically link those emails to the Account and Contact records they involve.

Let's go over how you would send your email. If it is still visible, click on the Last Viewed link to the Fred Nemeth Contact detail view, or look up the Contact from within the Contacts tab.

Within the Open Activities sub-panel for that contact, locate the *Compose Email* button, and click on it. Or just click on the Email icon in the *Live Business Card* header for Fred. You will see the Compose Email popup screen, which when completed would look much like this:

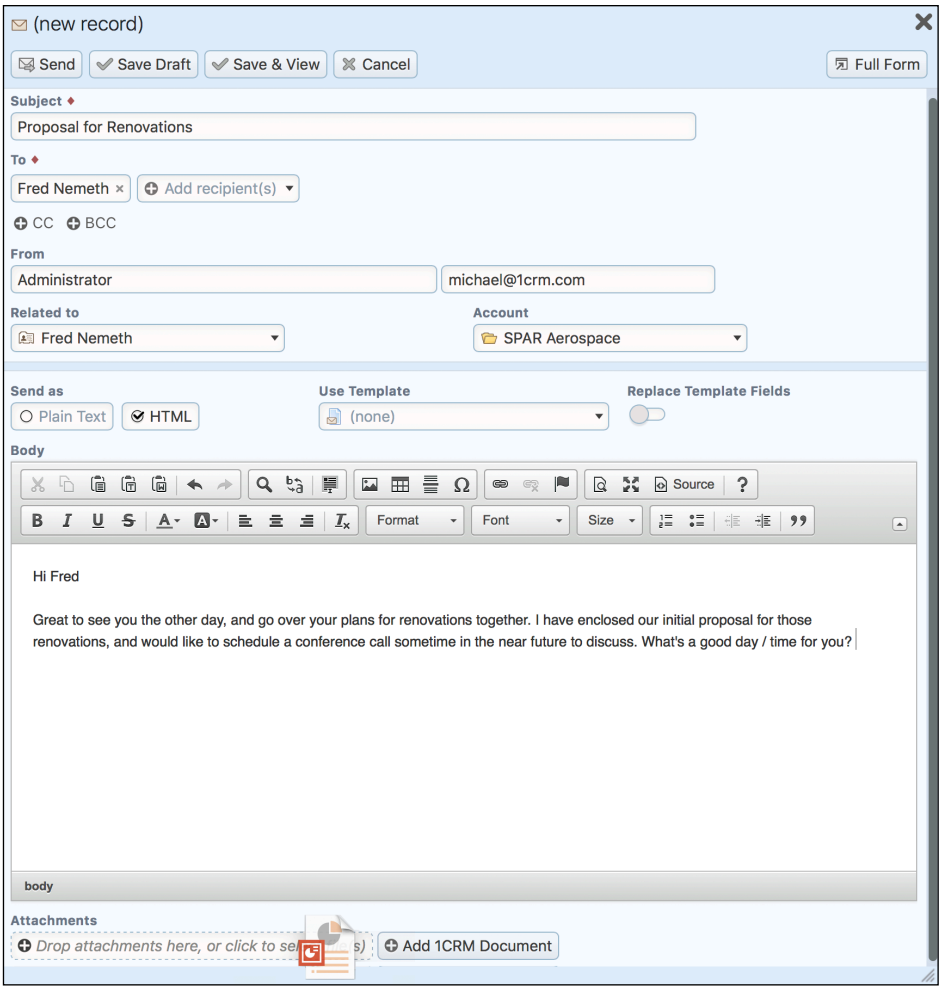


Figure 58: Compose Email

Notice that you can just Drag and Drop to attach the proposal to the email as shown above (you can add a single file or multiple files at once this way), or click in the attachments area to select a file. To choose who to send the email to, just click on Add recipient(s) and enter the first few letters of a Contact or Lead's first or last name and a list of possible suggestions will appear, from which you can select the one you want. Or click on to do a full search. You can also enter an email address not known in your CRM, as a custom entry.

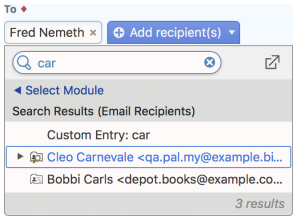


Figure 59: Adding Email Recipients

You can click to expand the CC and BCC addressee options, and you can drag and drop addressees between the TO, CC and BCC lists.

When you click on the *Send* button to send this email to Fred, you see a little confirmation box to confirm that the message has been sent. You can then link back to Fred's Contact record, and see

that the email is now included in the history sub-panel for him, for the reference of any other employee who comes into contact with Fred.

As ever, the email activity is listed in the history sub-panel along with its related Contact and Account – making it easy to quickly navigate between the email, the related Account and Contact, and any other items of information that are in turn related to that Contact or Account.

Now – let's learn a little more general information about the email capabilities of 1CRM. Click on the Emails tab and you will see the list view screen for emails, with lots of emails in it – like this:

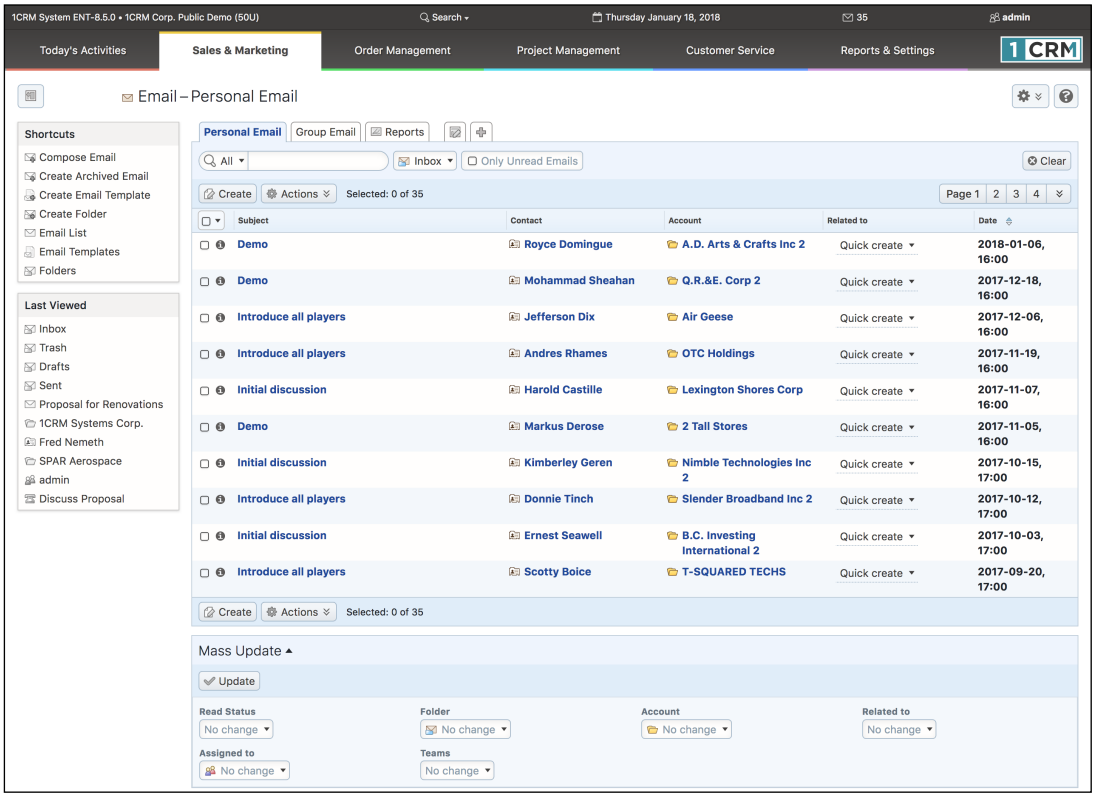


Figure 60: Emails List View

Examine the shortcuts list – notice that you can *Compose an Email*, *Create Email Template*, or *Create Archived Email*. You can also click on *Folders* to see a list of your email folders. You always have at least *Inbox*, *Drafts*, *Sent* and *Trash* folders, plus any others you create using the *Create Folder* shortcut. Also notice in the Personal Email search panel a dropdown control for the folder. This is how you switch folders - the list view will show you a list of the emails in the folder selected.

Within the Compose Email screen, as you can see in Figure 58, you can compose an email and just save it for now, without sending it. You use the *Save Draft* button at the top of the compose email screen to do that. Once you have saved a draft email, it can be displayed with all other draft emails by selecting the Drafts folder with the dropdown *Folder* control in the Personal Email search panel.

To send a draft email, click on its subject from the list view screen, and when on the detail view screen, you can click on the *Send* button at the top of the screen to send it right away, or click on the *Edit* button at the top of the screen to edit it, then when it is in its final form, click on the *Send* button to send it. To move emails from one folder to another, just select them on the list view by clicking on the checkbox to the left of the subject (or almost anywhere on the row, other than on linked text), then in the Mass Update panel at the bottom of the screen, select the target folder, and click on the *Update* button.

4.0 Today's Activities

4.1 The Home Dashboard

Figure 61 shows the 1CRM screen with the Home Dashboard selected:

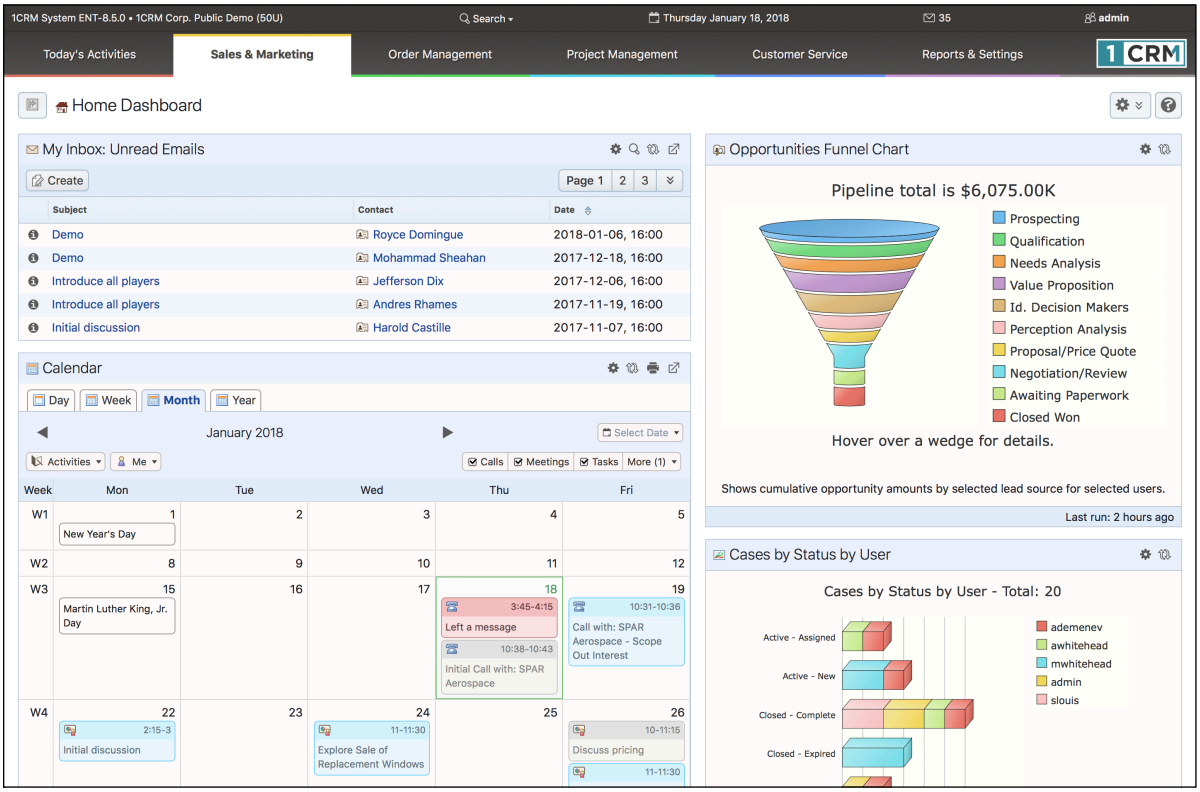


Figure 61: The Home Dashboard (Sidebar Collapsed)

Dashboard pages are in many ways the single most useful displays in the entire 1CRM System. Aside from the usual complement of navigation aids and shortcuts, the *Home Dashboard* page contains a series of information *dashlets*, which contain summary information from all the other modules in the system. Dashlets may also contain charts of 1CRM information, or information from external sources. These dashlets may be added to the screen layout, removed, and moved around, until you feel you have an information overview screen layout that is perfect for you.

Dashboard pages are defined in the Dashboards module, in the *Reports & Settings* tab grouping. By default, each 1CRM installation has two dashboard pages in the *Today's Activities* tab group - the *Home Dashboard* and *Action Items*. In most of the other tab groups (*Sales & Marketing*, *Order Management*, *Project Management* and *Customer Service*) there are also two dashboards by default. *Sales & Marketing* has a *Sales Home* dashboard and a *Sales Charts* dashboard, for example. *Sales Home* is at the start of the tab group, and *Sales Charts* is at the end, and the same sort of arrangement exists for the other tab groups mentioned.

4.1.1 Editing Dashboard Info

Each dashboard page has basic dashboard information defined for it, as well as a layout. The dashboard info may be set by using the Dashboards module, or by clicking on the button at the top of any dashboard page (see Figure above), and choosing the *Edit Dashboard Info* option from the four options presented. Once you do this, the following screen will be displayed:

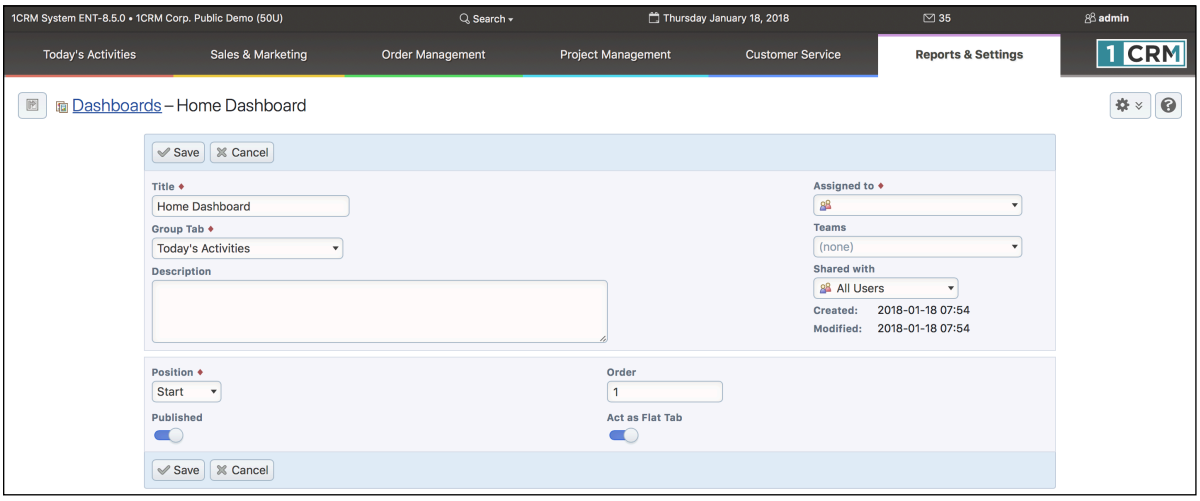


Figure 62: Setting Dashboard Information

On the Figure above, you can enter a new *Name* for the dashboard, choose the *Group Tab* in which it is to appear, and the position (*Start* or *End*) within that Group Tab. The *Order* value is used if for example 2 or 3 dashboards are defined as going at the Start of the same Tab Group. The *Published* toggle controls if the dashboard is displayed or not. And the *Act as a Flat Tab* toggle controls if the dashboard is to be displayed when a theme is in use that either does not offer tab groups, or has been set to simple *Modules* navigation, not *Grouped Modules*.

4.1.2 Editing the Dashboard Layout

Each dashboard also has a layout, which defines how many columns it has and the width of those columns (in percentage terms) plus the specific dashlets on the dashboard and their position and order in the columns.

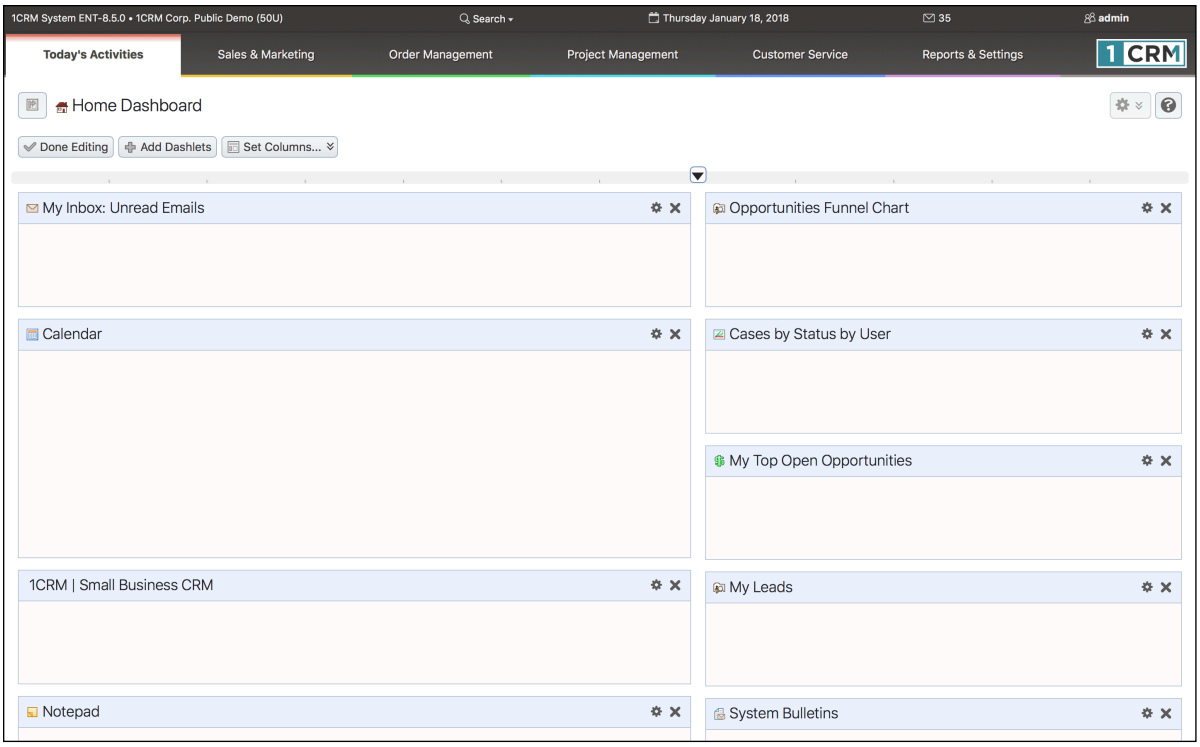


Figure 63: Dashboard - Edit Layout Mode (Sidebar Collapsed)

The dashboard layout information may be edited by clicking on the button at the top of any dashboard page (see Figure 61), and choosing the *Edit Layout* option from the four options presented. Once you do this, a screen similar to the Figure above will be displayed.

While in Edit Layout mode, you may perform these operations:

- To adjust the proportional width of the existing columns in a dashboard, simply drag the slider at the top of the boundary between the columns horizontally in either direction. The division of the total screen width allocated to each column will be displayed as it is adjusted.
- To adjust the number of columns on a dashboard, simply click on the button labelled *Set Columns*, and choose from the dropdown options of one, two, three or four columns.
- To remove a dashlet from the dashboard, just click on the ✕ at the top right of the dashlet. You will be asked for confirmation.
- You may move dashlets around on the dashboard by clicking on the title bar of the dashlet and dragging it to a location you prefer.
- You may edit the information a dashlet displays and how it is filtered by clicking on the gear icon ⚙ at the top right of the dashlet (see Figure 65 for an example of setting the options for a dashlet).
- To add a dashlet, click on the *Add Dashlets* button. When you do so, you will see a screen like that in the Figure below:

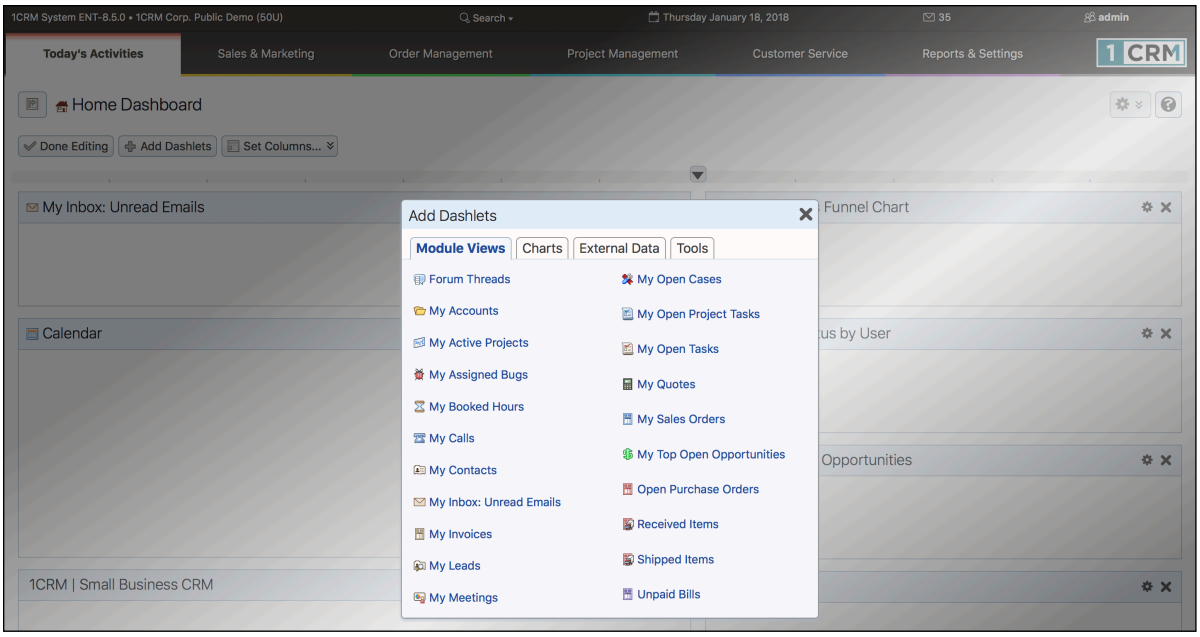


Figure 64: Adding a Dashlet

An *Add Dashlets* dialog box comes up - with four tabs to choose from: *Module Views*, *Charts*, *External Data* and *Tools*. Just select a tab, and click on a dashlet you want to add, or click on ✕ to close the dialog box. As you can see, Module View dashlets are a bit like miniature list views for the modules involved. Charts lets you select from a range of charts of 1CRM data. Tools currently contains the Activity Log, System Bulletins, Calendar and Notepad dashlets. And External Data contains the World Weather, Stock Quotes and News Feed dashlets.

When you have added all the dashlets you want, and have arranged them, you can finish editing your dashboard by just clicking on the *Done Editing* button to save the current state of the dashboard and return to the normal dashboard display.

4.1.3 Dashlet Controls

In the normal dashboard display mode, each dashlet may offer as many as five small icons in the top right of the dashlet, to perform various functions:

- You may edit the information a dashlet displays by clicking on the gear icon at the top right of the dashlet (see Figure 65 for an example of setting dashlet options).
- You may search the records from a module that is displayed in a dashlet by clicking on the search icon . (See Figure 66 for an example.) Note that the search text will be matched anywhere in the fields searched. For each module, the fields searched are the same ones used by the system search feature.
- To refresh the information displayed by a dashlet (such as out of date World Weather or Stock Quotes) simply click on the refresh icon that somewhat resembles a recycling symbol, at the top right of the dashlet.
- You may go to the list view for the module to which a dashlet is related - if it is a Module View dashlet - by clicking on the goto-module icon .
- On the Calendar dashlet you may use the icon to print out your agenda for the day.

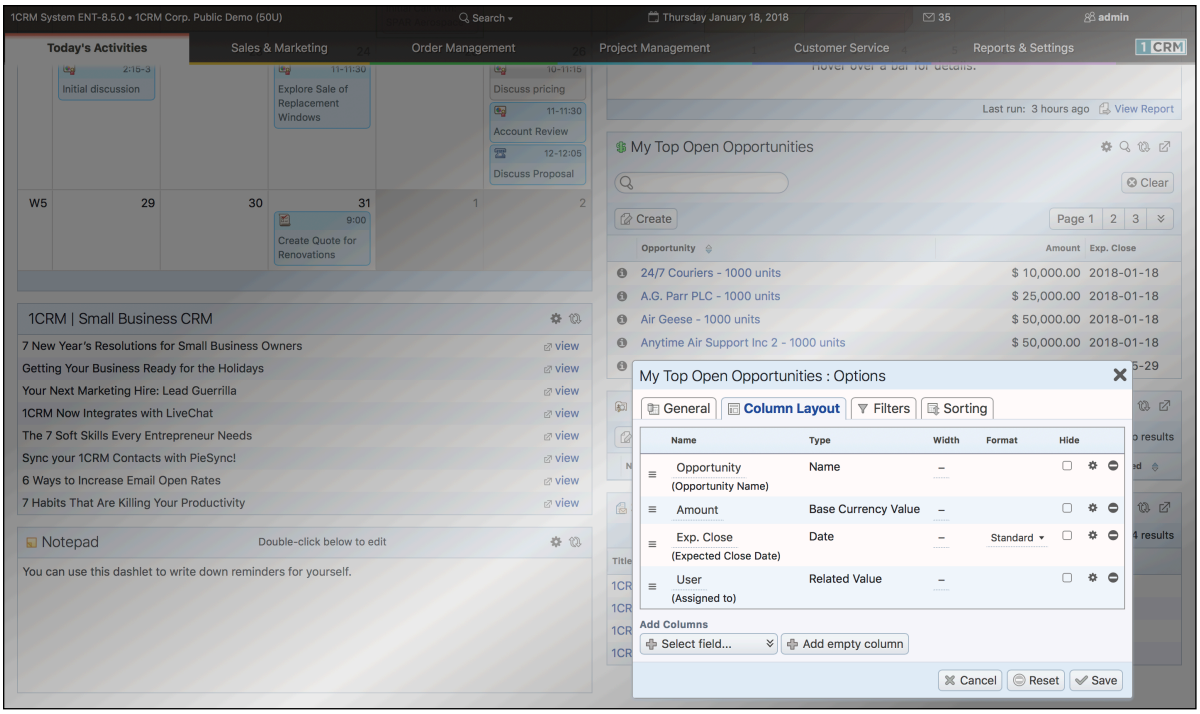


Figure 65: Setting Dashlet Options

Figure 66: Searching Dashlet Information

For a video look at how to manage dashboard pages, set dashlet options and apply search filters, see this video.

4.1.4 Module View Dashlets

Module View dashlets present information from 1CRM modules in a format that somewhat resembles a miniature list view format, as you can see in Figure 61, or in Figure 66 with the search filter active.

There is no filter panel above the list, although there are the dashlet options and search/filter capabilities to assist in this regard. There is also no Mass Update panel below the list. The list itself is shorter, and controlled by the *Display Rows* value in the dashlet options which may be set to 1, 3, 5 or 10. You can page forwards and backwards through the list, or move to the first or

last records in the module, and you can click on Create under the dashlet name to add a new record.

These dashlets also typically offer all four control icons - to edit the dashlet's options, apply a search filter, refresh the dashlet info, or go to the related module's list view.

Module View dashlets are extremely useful - typically in two main ways.

- To make data from that module accessible and searchable on your dashboard. Examples of this would be adding a Contacts or Accounts dashlet. Unless you plan to page forwards and backwards through the small pages of its short list view, the main utility of these dashlets is the search filter, so you can look up a specific account or contact quickly, without going away from your dashboard to do it.
- As reminders of a small number of important items in a module. You might add the *My Open Cases* dashlet to your dashboard, and set the options values so that it displays the oldest open Cases assigned to you at the top of the list as a reminder to work on them. Or you might add the *My Top Open Opportunities* to your dashboard so you can see the business you should be following up on.

4.1.5 Chart Dashlets

Chart dashlets show information from 1CRM modules in graphical chart form. They tend to be wider than most other dashlets, and so frequently you may wish to dedicate a whole dashboard to charts, or a specific column on a dashboard, so that dashlet widths align more successfully.

These dashlets typically offer two control icons - to edit the dashlet's options, and to refresh the dashlet info.

Note: If you have trouble seeing a chart, check in Admin if your 1CRM system is using Flash or SVG to generate charts. Flash is not supported on iPad or iPhone.

4.1.6 External Data Dashlets

There are currently three dashlets of this type:

- World Weather
- News Feed
- Stock Quotes

All three of these dashlets offer two control icons: to edit the dashlet's options, and to refresh the dashlet info.

World Weather Dashlet

The World Weather dashlet displays weather and local time information for up to ten selected cities around the world. Figure 67 below shows a typical World Weather display, and Figure 68 shows the option settings for that dashlet used to obtain that display. Note that the temperature has been selected to be shown in °C, and that the *Display TImes* option has also been set (which add the *Time* column to the display). You can also see how the *Add City* field is used to look up a new city to add to the display.

When using this dashlet you can click on any city name to see the expanded details for that city, or click on that city again to restore the dashlet to its more brief format. The time of the last data update is shown, and the dashlet caches data for two hours unless an explicit refresh is performed.

Note: To use this dashlet, your Administrator must first have configured the free OpenWeatherMaps API for it on the Admin - System Settings screen.

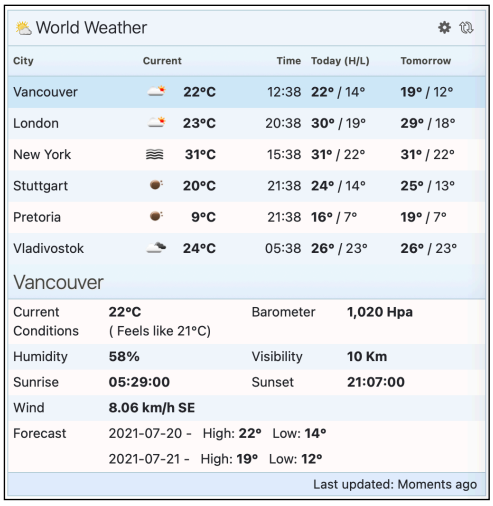


Figure 67: World Weather Dashlet Display

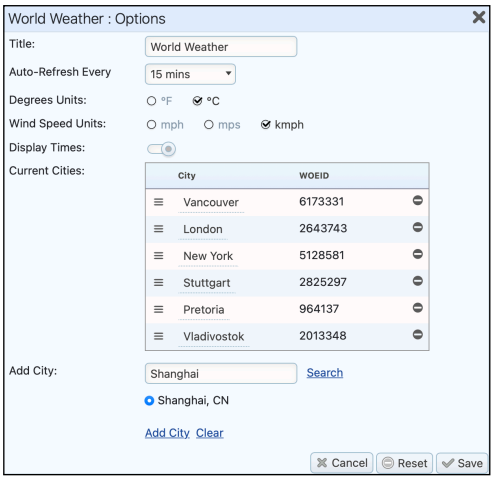


Figure 68: World Weather Dashlet Options

News Feed Dashlet

The News Feed dashlet allows you to choose a news feed from the list maintained by your 1CRM system's administrator, or to directly enter the URL for a feed.

Figure 69: News Feed Dashlet Display

On this dashlet's display, you can click on the text of any news item to bring up the news reader display as shown in the Figure below. From the news reader you can click forward and backward arrows to review the text of all items in the feed. You can click on *Close* to return to the dashboard page, on *View Story* to bring up a new browser window with the full news item, or on *Go to Site* to see all the news stories at that site.

In the dashlet display you can also click on the *View* link to the right of the text of each news item to immediately bring up the story in a new browser window without having to go via the news reader.

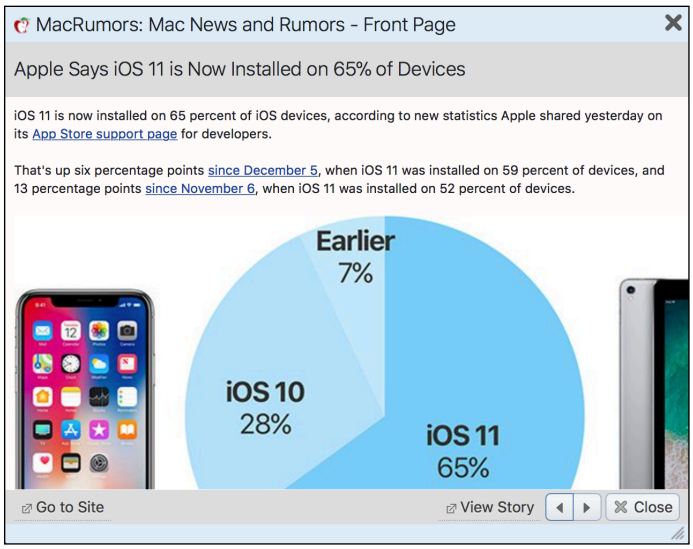


Figure 70: News Feed Reader

The News Feed dashlet options, as shown below, allow the user to search for a feed using any text string. If any matches are found for that text in the list of feeds maintained by the administrator, they will be displayed as shown below, and one may be selected for use in this instance of the dashlet. (You can add this dashlet to a dashboard several times over, and select a different feed for each instance, to get all your favourite news displayed on one dashboard).

The dashlet options also allow the user to set a custom title for the dashlet, to set the number of rows (news items) to be displayed, and to enter a feed URL manually that has been found on one of the many feed aggregation sites, such as the site for Google Reader.

Just click on *Save* to save these settings and return to the normal dashboard display.

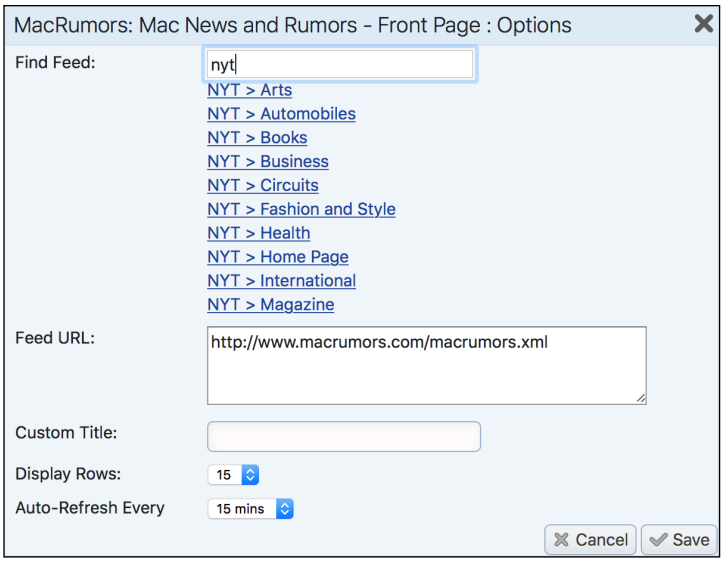


Figure 71: News Feed Dashlet Options

Stock Quotes Dashlet

The Stock Quotes dashlet displays recent stock quotes, using data from The Investors Exchange. Use the dashlet options (Figure 73 below) to enter the stock symbols you want displayed, separated by commas. A custom title may be set for the dashlet.

When using this dashlet you can click on any stock to see the expanded details for that stock, or click on that stock again to restore the dashlet to its more brief format. (You can also click on the link to *IEX Stocks* to see further information.) The time of the last data update is shown, and the dashlet caches data for two hours unless an explicit refresh is performed.

Note: Previous versions of this dashlet included chart options which were discontinued when *Yahoo! Finance* terminated their data feeds when acquired by Verizon. We hope to restore them when possible.

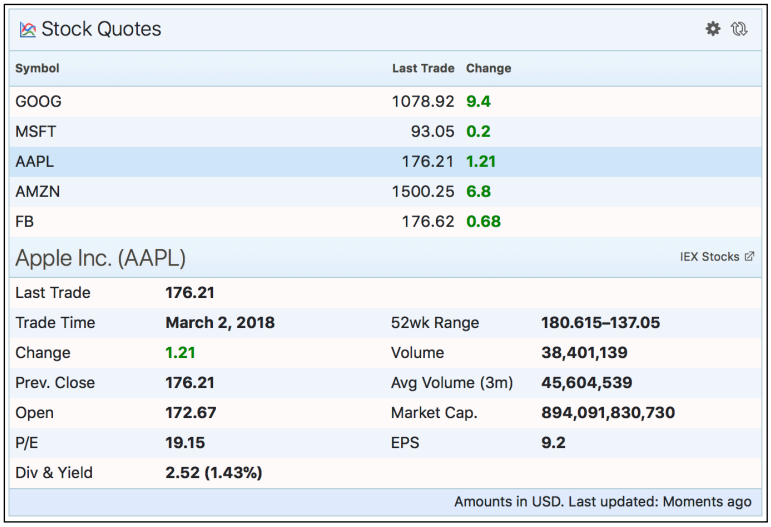


Figure 72: Stock Quotes Dashlet Display

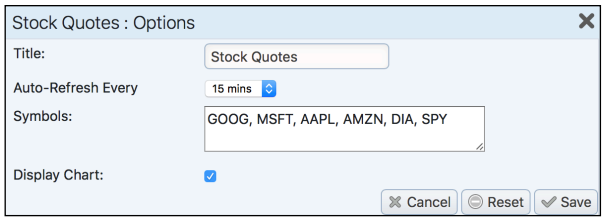


Figure 73: Stock Quotes Dashlet Options

4.1.7 Tools Dashlets

There are just two Tools dashlets - the Calendar and the NotePad. The Calendar dashet is very much the same as the Calendar module, so you should read about it in that section of this guide. The only difference is that the Calendar Week view does not show Saturday and Sunday, to keep the dashlet a little narrower. And the Day and Week Grid views are not available. The Calendar dashlet also has a configuration control to select the default display mode - *Day*, *Week*, *Month* or *Year*.

The Notepad is a simple little note-taking dashlet. Double click in the text area of the dashlet to be able to edit the text. When you click outside the dashlet again, your edits are saved. You can also set the height and name of the NotePad, and use multiple instances of the dashlet, as seen in the Figure below.

Figure 74: NotePad Dashlets

4.2 The Action Items Dashboard

Figure 75 shows the 1CRM screen with the Action Items dashboard selected:

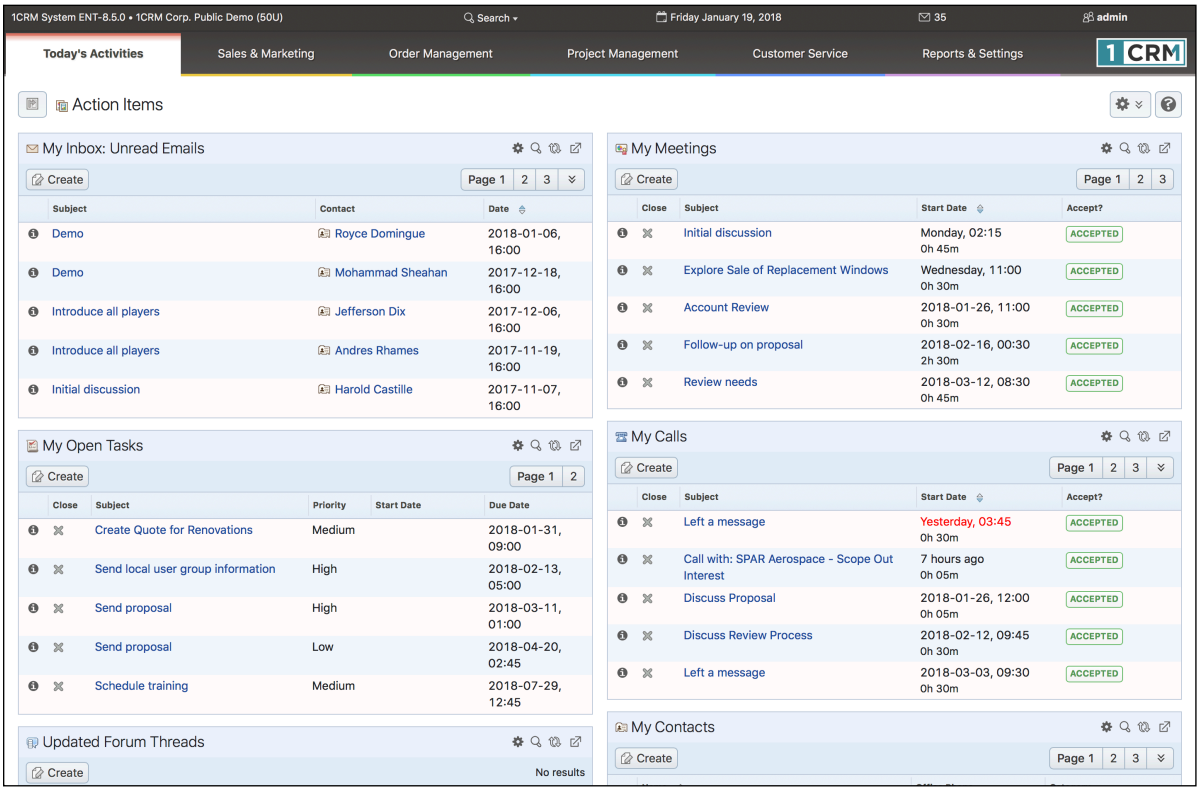


Figure 75: Action Items Dashboard

The *Action Items* dashboard contains a series of information *dashlets*, which contain summary information from other modules in the system.

Dashboard pages are defined in the Dashboards module, in the *Reports & Settings* tab grouping. By default, each 1CRM installation has two dashboard pages in the *Today's Activities* tab group - the *Home Dashboard* and *Action Items*. In most of the other tab groups (*Sales & Marketing*, *Order Management*, *Project Management* and *Customer Service*) there are also two dashboards by default. *Sales & Marketing* has a *Sales Home* dashboard and a *Sales Charts* dashboard, for example. *Sales Home* is at the start of the tab group, and *Sales Charts* is at the end, and the same sort of arrangement exists for the other tab groups mentioned.

For more information on editing a dashboard layout, adding and removing dashlets, adjusting the number and width of columns, or setting dashlet options, please see the preceding section on the *Home Dashboard*.

The information on the default *Action Items* dashboard layout has been selected to allow you to see at a glance all the calls, meetings and tasks you have coming up, as well as your email inbox (showing 10 rows so you get a good look). The *My Contacts* and *My Accounts* dashlets have been included with just 3 rows each, so you can use their search functions to look up any information you may need to progress your action items.

4.3 The Calendar Module

Figure 76 shows the 1CRM screen with the Calendar Module selected and the sidebar collapsed, with the cursor hovering over a meeting to show additional details.

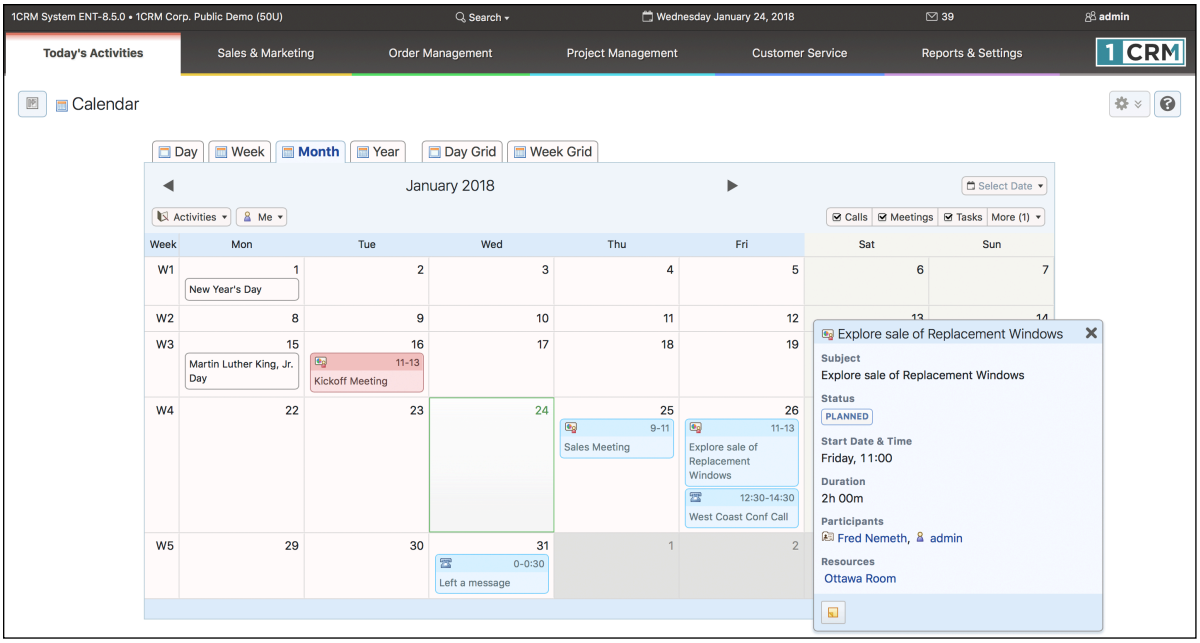


Figure 76: The Calendar Module (Month Layout)

4.3.1 The Calendar Display and Main Controls

The calendar module has six optional display layouts - Day, Week, Month, Year, Day Grid and Week Grid. Three of these layouts (Day, Week, Month) display calendar information for the current User, or for another selected User. The Year display layout just shows the calendar for the year with holiday information, and the ability to link to any date in the year. The other two layouts display a daily or weekly grid of information for scheduling meetings, with the ability to display schedule information for multiple selected Users as well as multiple selected Meeting Resources (such as meetings rooms, laptops, projectors and similar resources).

You may access the three User-oriented display layouts by clicking on the Day, Week and Month tabs at the top of the main body of the calendar display. The Month layout is shown in Figure 76 above, while Figures 81 and 85 below show the Calendar Day and Week layouts.

At the top of all the Calendar display layouts except Year, just under the tabs used to select the various layouts, you will see a number of controls:

- Arrow buttons to nudge to the previous or next Day, Week or Month.
- Links to go to Today's date, or to select a date for display.
- *Calendar Mode Selector:* A dropdown list which allows you to select the *Calendar Mode* from one of *Activities* (the default), *Resources*, *Projects* or *Timesheets.*

  Note: Only the Activities mode is available on the Day/Week Grid displays.

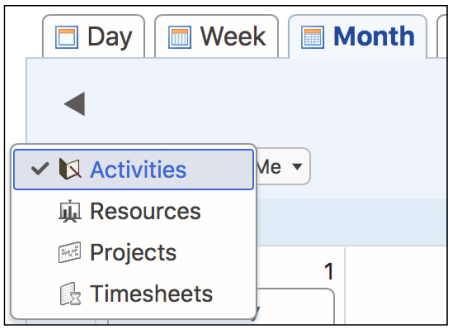


Figure 77: Calendar Mode Selector

- *User Selection Filter:* The Day, Week and Month layouts (for all modes except Resources) also offer a control to select a User for whom Calendar information is to be displayed, and a button to quickly return to showing information for the *Current User*.

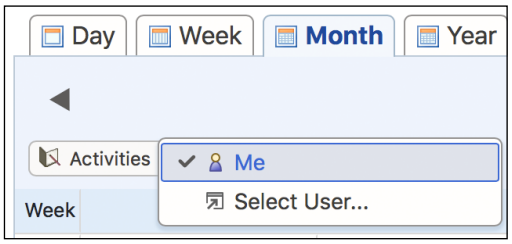


Figure 78: Calendar User Selection Filter

4.3.2 Calendar Modes

The *Calendar Mode Selector* allows you to select the calendar mode from one of *Activities* (the default), *Resources*, *Projects* or *Timesheets.*

Select the appropriate calendar mode for the work you intend to do. The *Activities* mode is used for conventional calendar information. *Resources* and *Projects* modes are used for Project Management tasks. And *Timesheets* mode is used to record your time as Booked Hours entries.

Calendar: Activities Mode

Icons are used to indicate each type of Calendar activity: for a Call, for a Task, for a Meeting, for a Project Task, for a Vacation and for an Event.

- Meetings and Calls are shown at their scheduled times. On the Day and Week Calendars they are shown with boxes sized to a height that approximates the duration of the Call or Meeting. Meetings with the All Day check box set are shown in the All Day section of the Day and Week Calendars.
- Tasks are shown on their Due Date (and are not shown if there is no Due Date) at the Due Time (which defaults to noon) with a box height on Day/Week Calendars of an hour meeting.
- Vacations and Public Holidays are shown in the All Day section of the Day and Week Calendars, and on the Month Calendar with no associated time.
- Marketing Events are shown for all users, in the All Day section of the Day and Week Calendars, and on the Month Calendar with no associated time. ***Note:*** The default filter setting for Marketing Events is *Off*, so you must check it to see this information.

- Project Tasks are displayed for any users assigned as a resource for that Project Task, and are also shown in the All Day section of the Day and Week Calendars. ***Note:*** The default filter setting for Project Tasks is *Off*, so you must check it to see this information.

A series of check boxes is used to select which types of calendar Activities to display. Calls, Meetings and Tasks check boxes are always visible, with check boxes for Marketing Events, Project Tasks and Vacations hidden behind a *More* dropdown link.

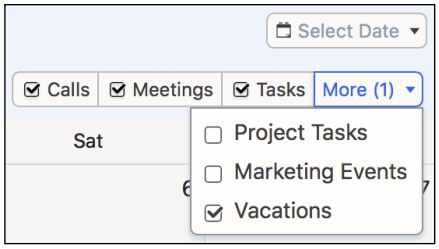


Figure 79: Calendar Activities Filters

Calendar: Resources Mode

Select this mode to show the free/busy status of a selected meeting resource (or all meeting resources) on the normal Day, Week or Month calendar layouts. In this mode you can select a meeting resource (or all of them) using the control under the Calendar Mode Selector.

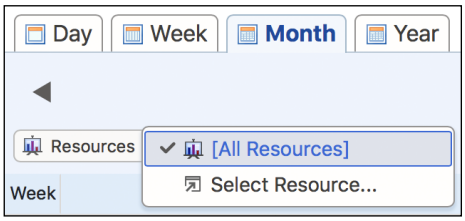


Figure 80: Calendar Resource Filter

Note: There are also dedicated Day Grid and Week Grid layouts available for the calendar which are even more useful for viewing the status of meeting resources.

Calendar: Projects Mode

Select this mode to show project tasks assignment information within the calendar context. A slightly different User Selection filter may be used to select any one user, or all users. And the Project filter control may be used to select a single project, or all projects. Once these filters are set, the main body of the calendar (in Day, Week or Month layout) will show project task assignments for all selected users on any selected projects.

As illustrated in Figure 81, assignments are shown in the All Day section of the calendar, and the user may hover there to see multiple assignments displayed as a dropdown list. Then the user may hover on any selected project task to see a pop-up of more information.

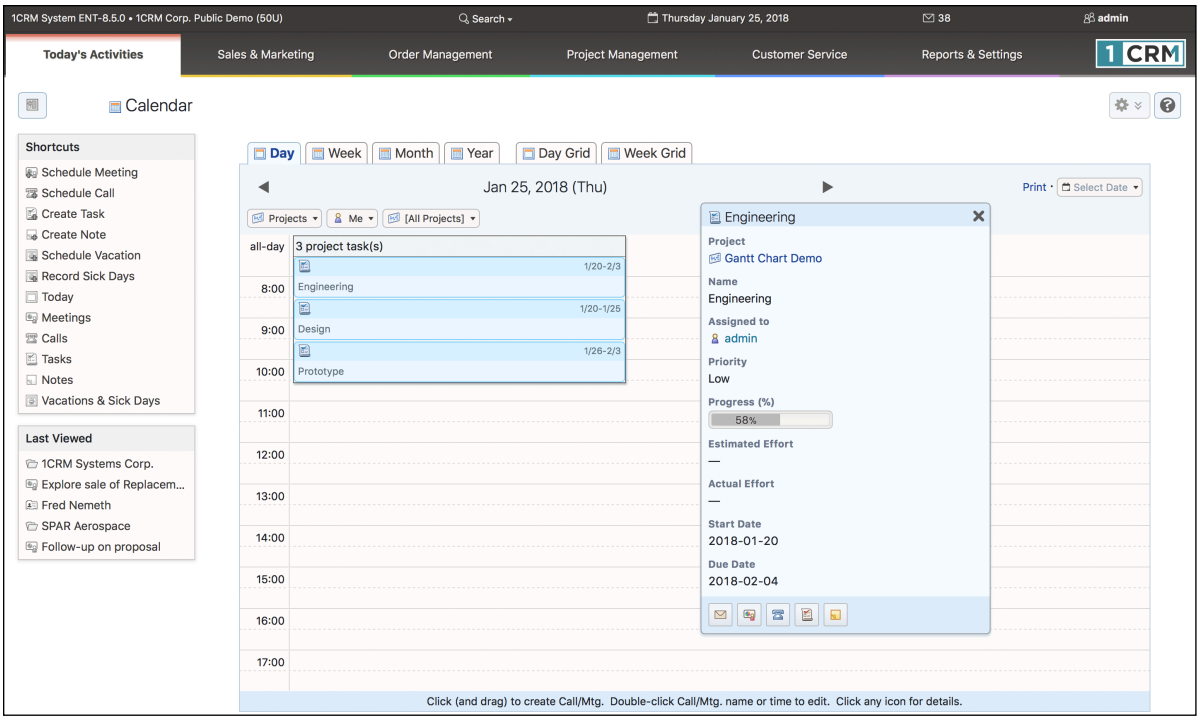


Figure 81: Calendar - Projects Mode

Calendar: Timesheets Mode

Select this mode to display or enter Booked Hours information within the calendar context. The normal User Selection filter may be used to select the current user, or any subordinate user. Once this filter is set, the main body of the calendar (in Day, Week or Month layout) will show Booked Hours for the selected user. An additional *Create Timesheet* control is provided to create a Timesheet if one does not exist for the period selected. When a Timesheet does exist its name is displayed, the control changes to a dropdown selector for available timesheets, and a *Submit* button can submit the Timesheet for Approval. Any hours entered are related to the currently selected user and Timesheet.

New Booked Hours are created in this mode by clicking and dragging, much like defining a new Call or Meeting.

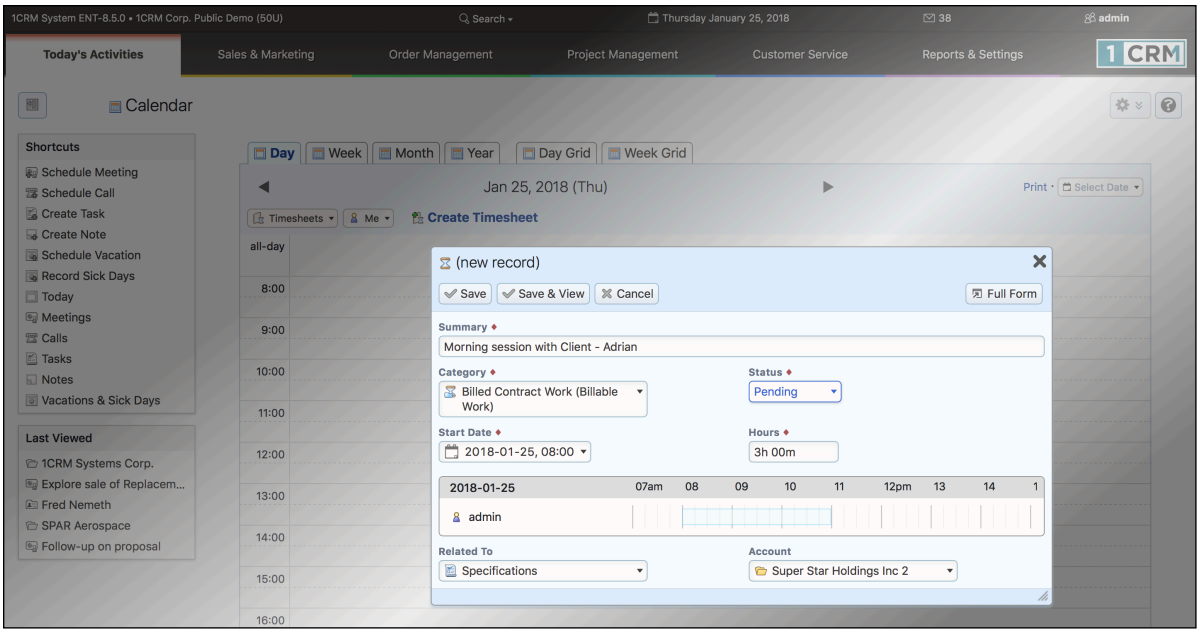


Figure 82: Calendar - Entering Booked Hours in Timesheets Mode

Simply click-and-drag on the calendar display (Day or Week layouts - the Month layout simply displays Booked Hours entries) to create a new Booked Hours entry - with the start time and number of hours indicated by your click-and-drag action. As shown in Figure 82, a popup form is displayed to enter the information. Once the new Booked Hours entry is saved, it will be displayed on the calendar as shown below:

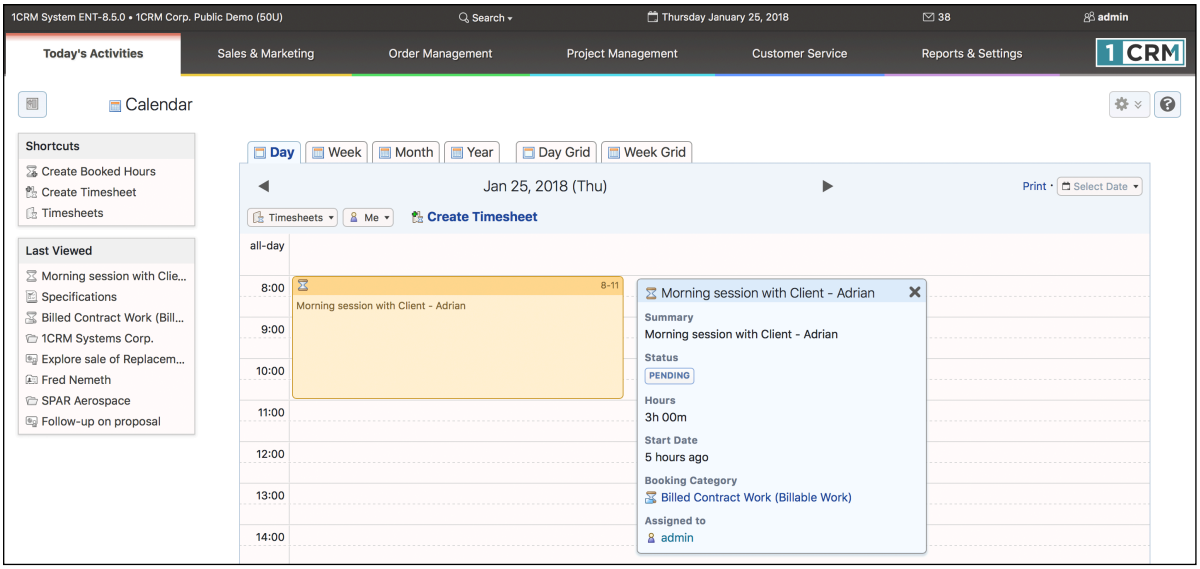
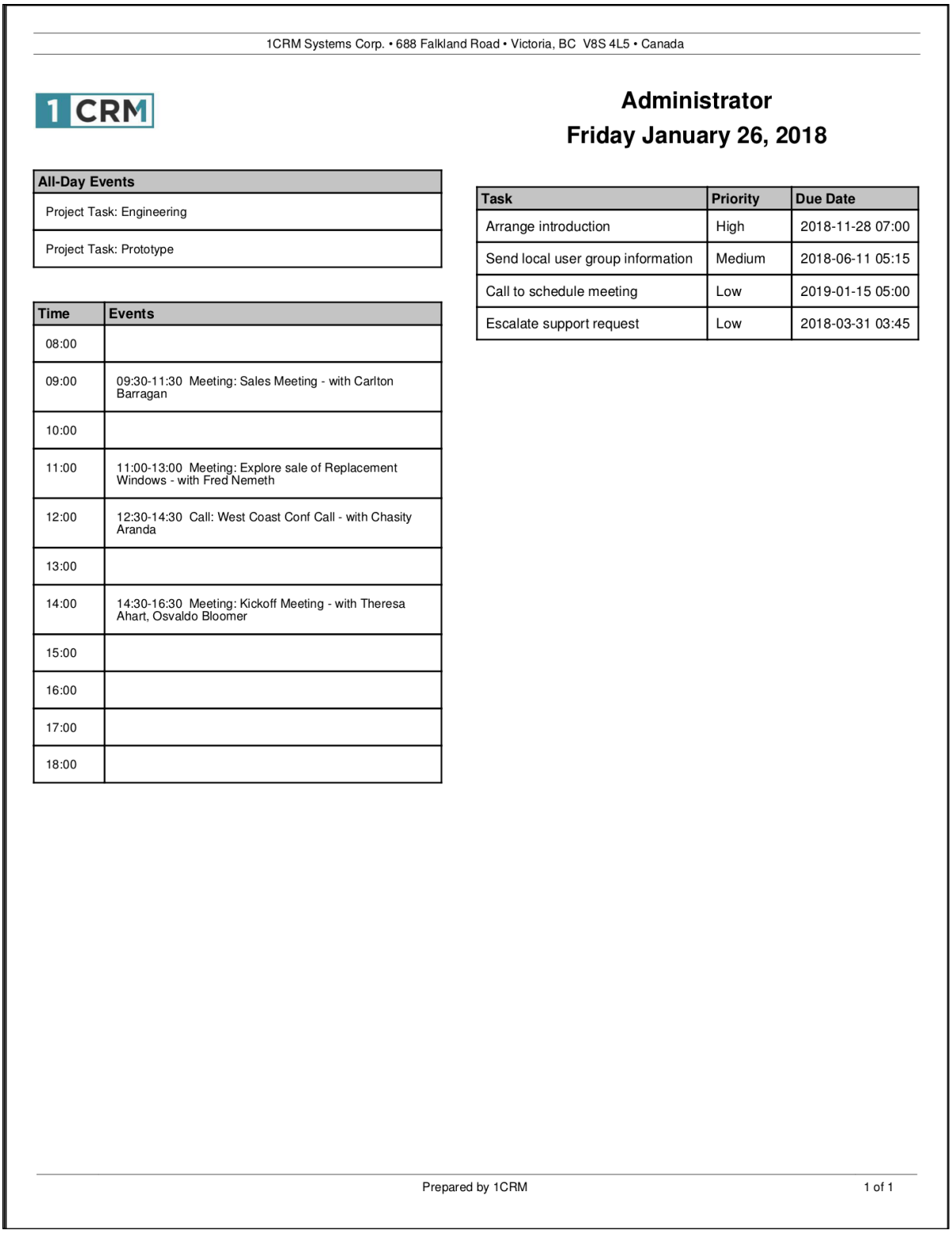


Figure 83: Calendar - Timesheets Mode

4.3.3 Calendar Day Layout, and Printing Today's Calendar

As you can see in Figure 83 above, you may click on the *Print* link (towards the top right) on the Calendar Day tab to print out your appointments and tasks for the day (see Figure 84 below).



1CRM Systems Corp. • 688 Falkland Road • Victoria, BC V8S 4L5 • Canada

1CRM

Administrator
Friday January 26, 2018

All-Day Events
Project Task: Engineering
Project Task: Prototype

Time	Events
08:00	
09:00	09:30-11:30 Meeting: Sales Meeting - with Carlton Barragan
10:00	
11:00	11:00-13:00 Meeting: Explore sale of Replacement Windows - with Fred Nemeth
12:00	12:30-14:30 Call: West Coast Conf Call - with Chasity Aranda
13:00	
14:00	14:30-16:30 Meeting: Kickoff Meeting - with Theresa Ahart, Osvaldo Bloomer
15:00	
16:00	
17:00	
18:00	

Task	Priority	Due Date
Arrange introduction	High	2018-11-28 07:00
Send local user group information	Medium	2018-06-11 05:15
Call to schedule meeting	Low	2019-01-15 05:00
Escalate support request	Low	2018-03-31 03:45

Prepared by 1CRM 1 of 1

Figure 84: Today's Calendar Printed Format

4.3.4 Working With Calendar Items

For each item displayed on the calendar, you have several controls available to you to manage it:

1. You may single click on the item's icon (for a Call, for a Task, for a Meeting, for a Project Task, for a Vacation and for an Event) to leave the calendar module and display the detail view for that item.
2. On the Calendar Day and Week layouts you may click on any Call or Meeting to pop up a display box to edit the details of that Call or Meeting without leaving the calendar module.
3. You may hover over the coloured rectangle of information displayed for any item, which will cause more details about the item to be displayed while remaining on the calendar display. (See Timesheet entry details in Figure 83 above, or Project Task info in Figure 81.)
4. On the Calendar Day and Week layouts you may click and drag the Activity to a new time to reschedule it.

Each different calendar layout allows you to nudge backwards and forwards in time - by a day, week, month or year as appropriate. In the Week, Month or Year display layouts, clicking on a particular date within the display will navigate to the Calendar Day layout for that date.

4.3.5 All Day Calendar Items

On the Calendar Day and Week layouts, at the beginning of each day is an All Day area, which shows calendar items that last all day, or have no specific time during the day. These items are:

- Meetings scheduled for that day which have the All Day flag set
- Events that are active on that day
- Vacations that extend through that day
- Public Holidays that fall on that day
- Project Tasks for which you are a resource on that day

If there is just one All Day item on any given day, it is displayed on the Day or Week Calendar layouts in the All Day area, in a similar fashion to any other calendar item.

In Figure 85 below you can see how multiple All Day events are shown with summary text such as *2 Project Task(s)*, or *3 Project Task(s), 1 Holiday(s)*, if a day has multiple All Day entries. As also shown there, you can see details of them all by cursoring over the summary All Day information for that day. A dropdown list of those multiple items is then displayed, each with support for the normal actions you can take on a calendar item:

1. You may single click on the item's icon (for a Call, for a Task, for a Meeting, for a Project Task, for a Vacation and for an Event) to leave the calendar module and display the detail view for that item.
2. You may click on any Call or Meeting to pop up a display box to edit the details of that Call or Meeting without leaving the calendar module.
3. You may hover over the coloured rectangle of information displayed for the item, which will cause more details about the item to be displayed while remaining on the calendar display.

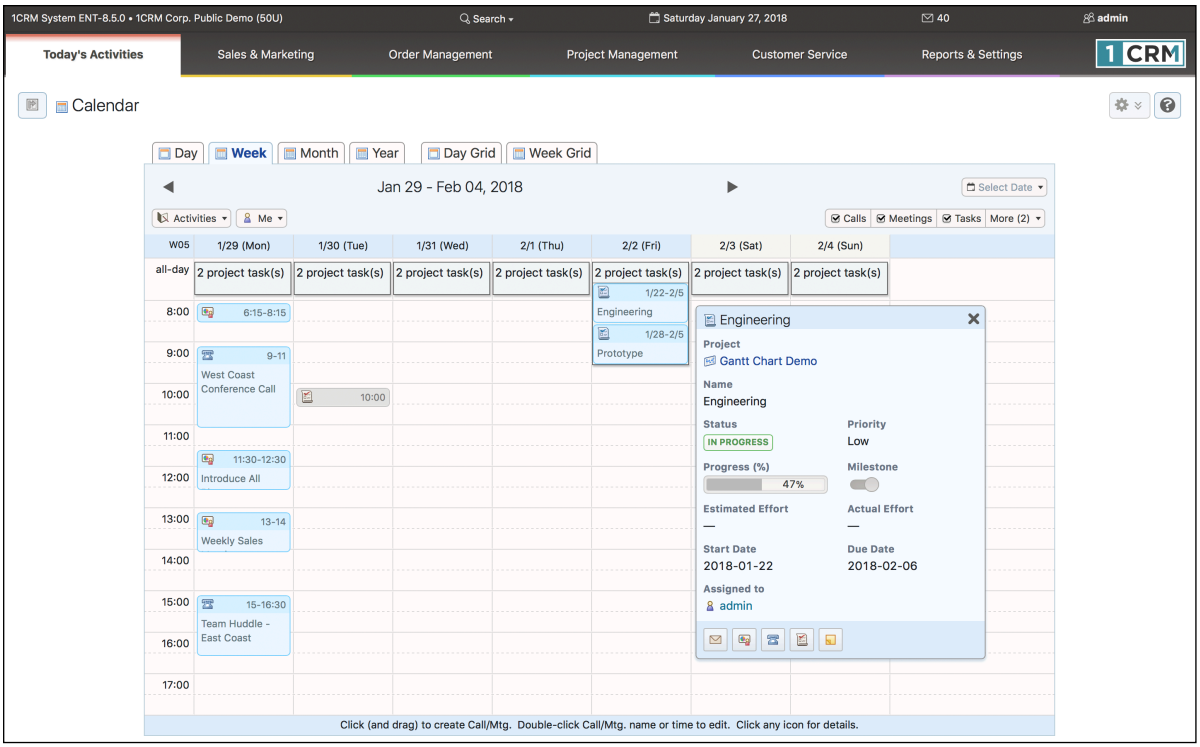


Figure 85: The Calendar Module (Week Layout)

4.3.6 Public or Private Calendar Information

Tasks, Meetings and Calls each have a check box that can be used to mark them as Public, or unchecked to mark them as Private. If you are viewing your own calendar information, then your Private information will look the same to you as if it were not private. But if someone else is viewing your calendar information, then Private Calls, Tasks and Meetings will be displayed at the correct time, and with the correct duration, but with no further information. The existence of a Private Call, Private Meeting, or Private Task is all that another user will see, but with the right time and duration so that a scheduling conflict may be avoided.

4.3.7 Scheduling New Calls and Meetings

You can create new Calls and Meetings two ways:

- On the Calendar Day or Week layouts (either in the Calendar module or in the Calendar Dashlet on a dashboard page).
- By using the Schedule Call and Schedule Meeting shortcuts available in the Calendar module and on the Home dashboard and Action Items dashboard.

The Calendar Day and Week layouts have the hours of the day listed vertically, and clicking on a specific time brings up a dialog box for scheduling a Call or Meeting, as shown in Figure 86 below.

Clicking and dragging will set both the time and duration of a planned Meeting or Call. Figure 86 illustrates a new meeting created by clicking and dragging from 10:00 AM to noon on the Calendar Week layout. The *Add Resources* button has been used to assign a meeting room and the *Add Participants* button to relate a Contact. The meeting can also be marked as a recurring meeting, Public or not (Private), or related to other information in the system. The time/resource grid is used to check for meeting conflicts.

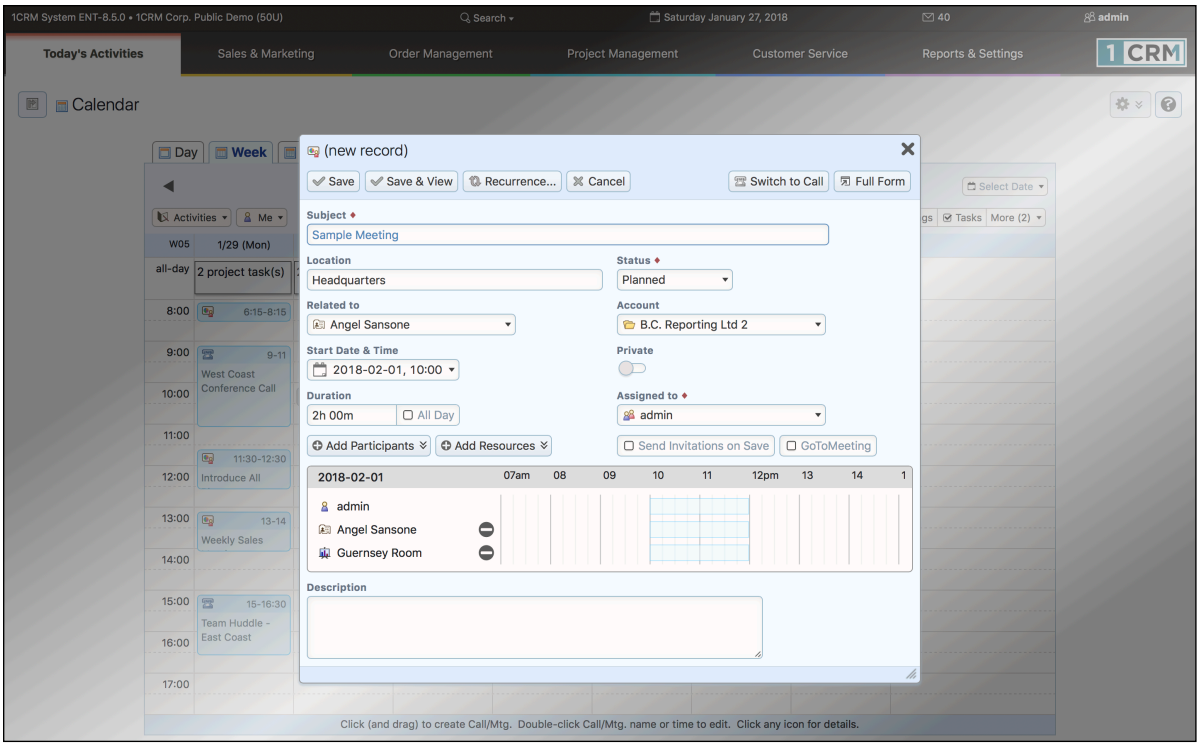


Figure 86: Scheduling a Meeting on the Calendar Week Layout

You may also schedule new Calls and Meetings using the appropriate shortcuts in the Calendar module. For example, when scheduling a new meeting using the Schedule Meeting shortcut in the Calendar module, you see a screen like that shown in Figure 87 below.

Using this screen, both Users and Contacts may be added to the meeting (via the *Add Participants* button), as well as meeting Resources such as meeting rooms, projectors etc.. Schedule conflicts may be seen on this screen once you set the time and duration of the meeting, and invitations will be sent out to both users and contacts at other organizations if the *Send Invitations on Save* checkbox is checked as the new meeting is saved.

You add Contacts or Users by clicking on the *Add Participants* button, and then searching for and selecting the Contact or User desired in the popup window presented. They will be added to the time/resource grid above once selected.

Display and Email reminders may be set for the meeting by using the appropriate dropdown box to both enable the reminder and set the amount of time prior to the meeting when you would like the reminder. (***Note:*** Only visible on the *Full Form*, not on the form overlaid on the Calendar display.)

Recurring Meetings

A meeting may also be defined as a recurring meeting. To do so click on the *Recurrence* button on the Meeting edit view. A recurrence dialog box pops up to allow you to define the parameters of the recurrence. The recurrences of the initial meeting are created by a scheduler task that runs once a day. Recurring instances are created for the next month, but no more than 50 instances may exist at one time. When you edit a recurring meeting, a control at the top of the screen offers you three options:

1. *Update all instances* - A simple change for all instances of the meeting.

2. *Update this instance only* - Breaks the original sequence of meetings, ending it before the item being edited, and starting a new sequence with the item *after the one* being edited. Instance edited becomes a standard meeting with no recurrence.
3. *Update this instance and all future instances* - Breaks the original sequence of meetings, ending it before the item being edited, and starting a new sequence with the item being edited.

Time & Date Entry Abbreviations

Rather than always having to enter a full date in the proper format (or select it using the small Calendar icon), and then enter the time in its correct format as well, a number of abbreviations are available if you prefer to use them: (Assume today's date is August 4th, 2018, and the current date format is 2018/08/04)

- Enter a number < 1000. It is taken as the day of the month, and the current month & year are assumed. (Example: enter 10 and press the *Enter* or *Return* key, and see 2018/08/10)
- Enter a number > 1000. It's taken as the year. Current day and month are assumed.
- Enter + or - and a number, and it's taken as a day offset (-5 ⇒ 5 days previous, +0 ⇒ today)
- Enter + or - a number plus ***m***, and it's taken as a month offset (+5m ⇒ 5 months from today)
- Enter + or - a number plus ***y***, and it's taken as a year offset (+1y ⇒ 1 year from today)
- Enter two numbers, they are taken as the month and day (10 5 ⇒ 2018/10/5)
- Paste a timestamp in the *date* part of a date/time field, and it splits the time off and moves it into the second part of the field.
- In the time field, a single number is taken as the hour. Numbers < 8 are assumed to be ***PM***, although ***AM*** or ***PM*** (or just ***a*** or ***p***) can be added
- Decimals are supported in the time field, consistent with duration input fields (1.5 ⇒ 1:30)
- In combination: +5d 8p ⇒ date: 5 days in the future, at 8:00pm

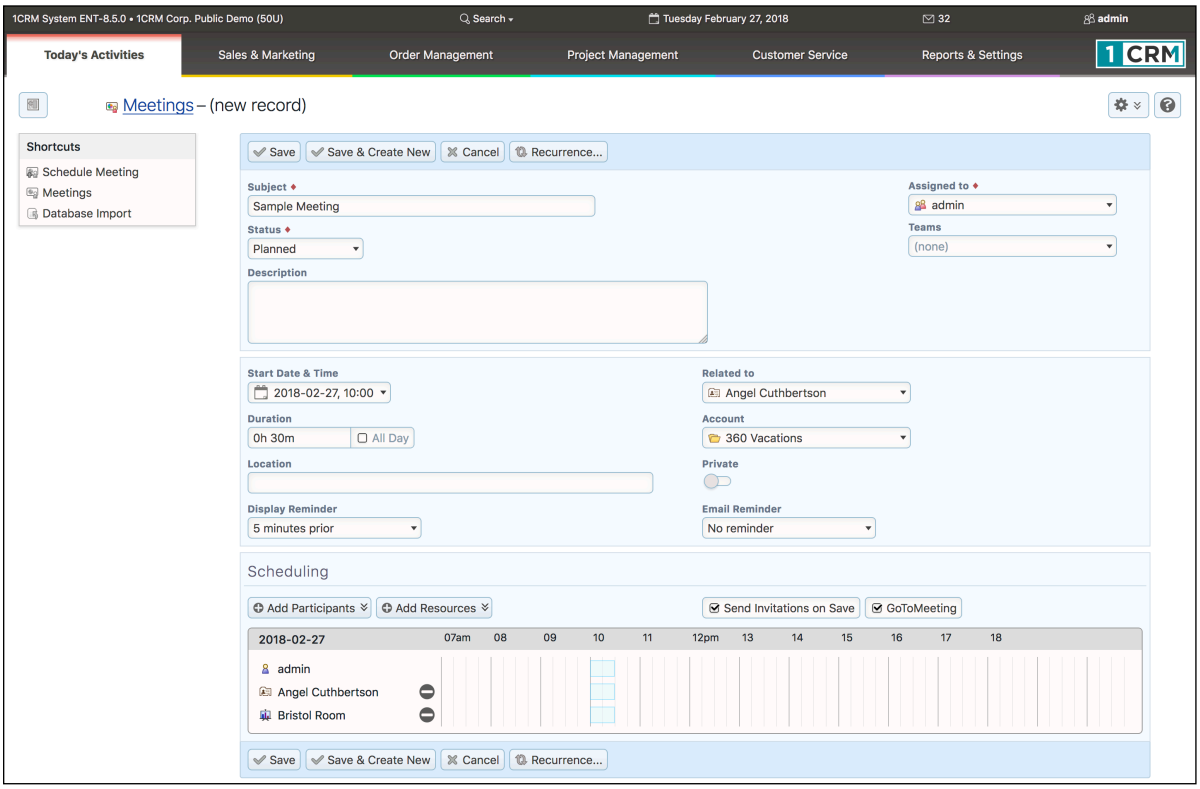


Figure 87: Using the *Schedule Meeting* Shortcut

4.3.8 Holidays, and Holiday Packs For Other Regions

The calendar shows holidays in its various views (all of the Day, Week, Month and Year views show holiday information). 1CRM comes standard with holiday information loaded for the United States, Canada (Ontario), Australia, France, Italy, Spain, Germany, Switzerland and the Philippines. To load a holiday pack for another region, simply load it with *Upgrades & Customization* in Admin. Then in Admin - System Settings the default holiday pack for your entire 1CRM installation may be selected. And on your *My Account* screen you may choose if your calendar displays use the system default holidays, or those from another holiday pack available on the system. Sample calendar packs are available upon request for those that wish to develop their own holiday packs.

Note: The information in a holiday pack typically contains holiday data for the next 20 years.

4.3.9 Google Calendar Synchronization

On the *Integration* tab of your My Account screen, there is a panel called Google Account Settings. First you will need to authorize 1CRM to access your Google data, so that 1CRM may exchange calendar information with your Google account. Click the *Authorize* button in the Google Account Settings sub-panel to go to the Google web site. When a popup window opens, click *Accept* to generate an access token. Copy the generated token, and paste it into the box on the left, then *Save*. You will need to login to your Google account first.

In the Google Calendar Settings panel, use the *Sync Setting* dropdown to choose the flow of calendar data: one way from 1CRM to Google, or the reverse, or two-way. You may also disable the sync by choosing the - *Sync Disabled* - option. Dropdown boxes are available so you may choose which calendar items (Calls, Meetings, Tasks) are synchronized between Google and 1CRM.

Note: New activities created in Google are synchronized into 1CRM as Meetings.

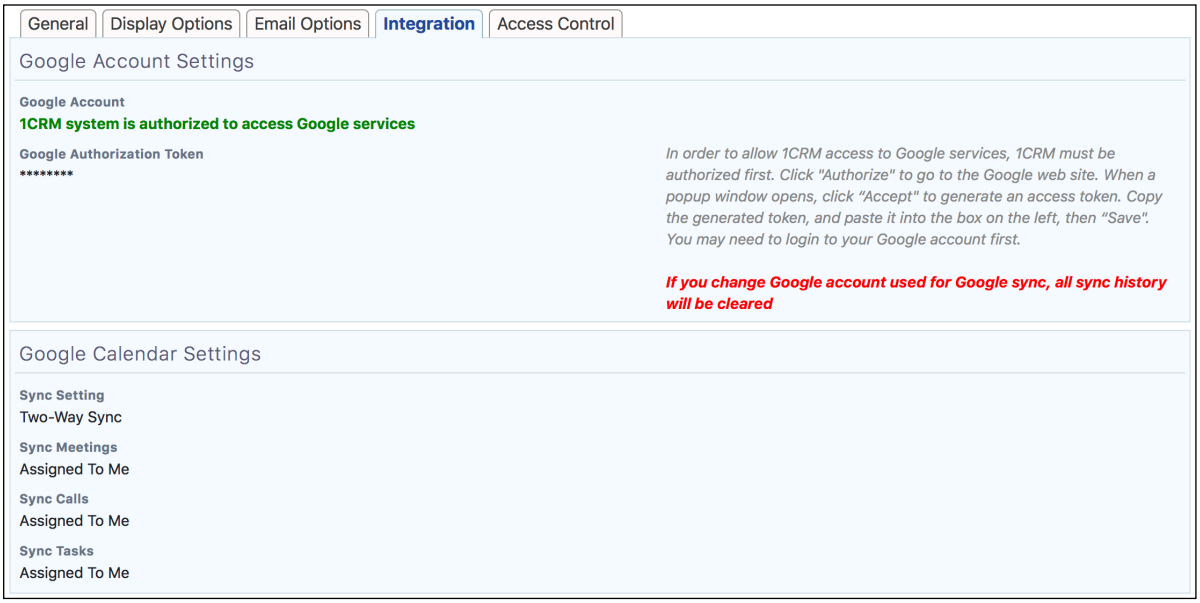


Figure 88: Google Account & Calendar Settings on My Account Detail View

If you create a recurring meeting in 1CRM, when you are synchronizing with a Google calendar, a recurring event will be created in the Google calendar. Editing the recurrence rules for a Google event drops all instances of the recurring meeting in 1CRM, and a new sequence will be created on the next run of the scheduler. Although 1CRM allows multiple recurrence rules per meeting, only one is taken into consideration when synchronizing - since Google calendar does not support multiple

rules. So, if Google calendar synchronization is active, only single-rule recurrences should be defined in 1CRM.

Note: To sync with your Google Calendar the *Sync Google Calendar Events* scheduler entry must be enabled, and your scheduler must be running. A run interval of 15 minutes is the recommended value. A maximum of 50 items are transferred for each sync, to manage load on the server.

4.3.10 CRMSync CalDAV Calendar Synchronization

On the *Integration* tab of your My Account screen, there is a panel called *CRMSync (CalDAV Server)*. The CRMSync feature in 1CRM offers a CalDAV server to provide data sync capabilities for 1CRM Calls, Meetings and Tasks. To use the CRMSync feature for Calls and for Meetings, simply set the dropdown options here to choose what Calls and Meetings to sync: *Assigned To Me*, *All I Am Invited To* or *All I Can See*. For Tasks your options are just *Assigned To Me* and *All I Can See*.

Then in any other system that supports CalDAV, such as *Calendar* and *Reminders* on macOS (for Apple Mac computers), or iOS (for iPhone and iPad), Android phones and tablets, or Microsoft Outlook (via a number of Outlook add-on options), simply subscribe to the CalDAV service by using the login credentials of your 1CRM server plus one or more of the CalDAV URLs as shown in Figure 89 below.

Note: Be sure to use the actual URLs shown on your own *My Account - Integration* tab, not those shown in our example here.

Different applications use different URLs. For example, the macOS Calendar app requires the Principal URL, and adds all 3 calendars. In Mozilla Sunbird, you add all 3 calendars separately, using the corresponding URLs for Calls, Meetings and Tasks.

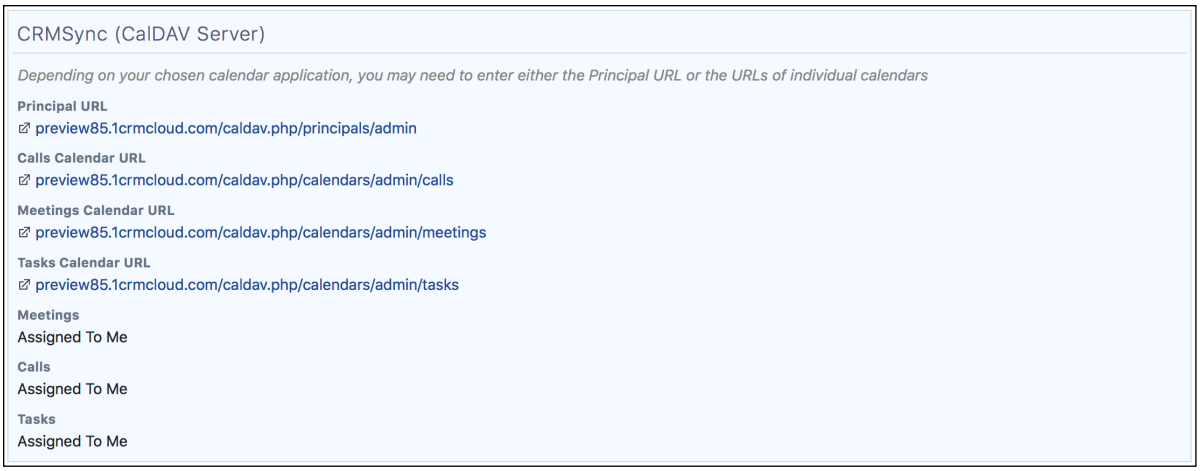


Figure 89: CRMSync (CalDAV Server)

For more information, see the section in Chapter 10 entitled *CRMSync for Calls, Meetings, Tasks (CalDAV Server)*.

4.3.11 Calendar Grid Layouts for Scheduling Multi-Person Meetings

Of the six layout tabs at the top of the calendar, two of them are used specifically to display information about multiple Users as well as Meeting Resources, so that a convenient meeting time can be established.

The Day Grid layout shows a table of selected users and meeting resources (meetings rooms, projectors, etc..) and any meetings in which they are involved for the hours of the business day. The display begins with the current user and no meeting resources, and you may add the users and meeting resources desired.

- You can double click on any Call or Meeting to edit it.
- You can single click on the icon for an existing Call or Meeting to leave the calendar module and display the detail view for that item.
- You can click on any 15-minute segment of a day to create a new meeting (default 15 minute duration) that automatically schedules the currently selected users and meeting resources.
- You can also hover over the box for any meeting to see the Additional Info box for it.

The Week Grid layout shows a table of selected users and meeting resources (meetings rooms, projectors, etc..) and any meetings in which they are involved for the seven days of a selected week. The display begins with the current user and no meeting resources, and you may add the users and meeting resources desired.

- You can double click on any Call or Meeting to edit it.
- You can single click on the icon for an existing meeting to leave the calendar module and display the detail view for that item.
- You can single click on any *Add New Call/Meeting* icon to create a new meeting on that day and automatically schedule the currently selected users and meeting resources.
- You can also hover over the box for any meeting to see the Additional Info box for it.

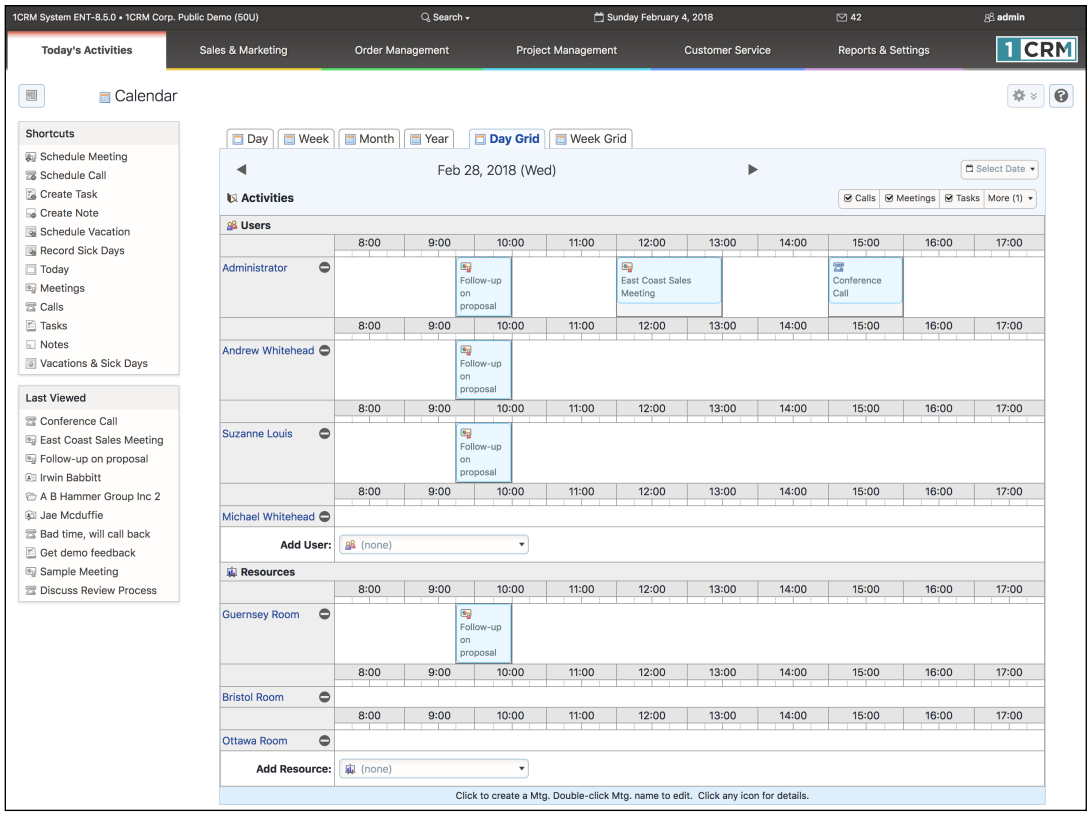


Figure 90: The Calendar Module (Day Grid Layout)

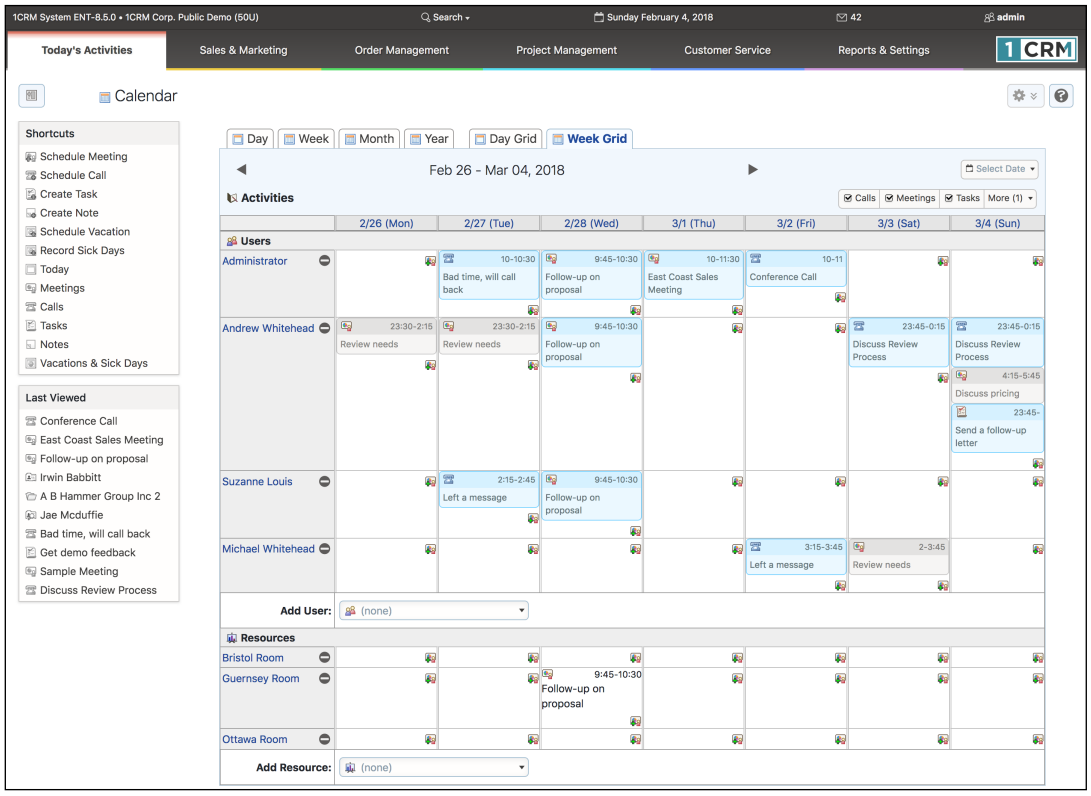


Figure 91: The Calendar Module (Week Grid Layout)

4.3.12 Online Meeting Integration

When scheduling a new meeting, you have the option of checking a box to request an Online meeting for the meeting service your administrator has selected, such as GoToMeeting, Zoom or Microsoft Teams. If you check this box for a new meeting, and then *Save* the meeting, 1CRM will automatically schedule an Online meeting at the same time, by communicating with the service via their web API. If you later on re-edit a meeting with an associated Online meeting, and uncheck the box, and *Save*, 1CRM will automatically remove the meeting from the service.

Note: When saving a 1CRM meeting with an Online meeting selected, it can take several seconds for the meeting record to save, as the communication takes place with the Online meeting service.

Note: In order to use this feature, your administrator must first select your company's Online meeting service on the Company Information administration page and provide the company's account information to authorize 1CRM to connect to the service. You can then set the information for your own account on the *My Account* page, in the *Integration* tab. (Or inherit the account credentials from the *Admin - Company Information* settings if your own *My Account* settings are left blank.)

Note: When system reminder emails are sent for meetings, and when meeting invitation emails are sent, they will include the link to join the Online meeting session if there is one.

4.3.13 Vacations & Sick Days

From within the Calendar module, there are three shortcuts available specific to planning and recording Vacations and Sick Days.

The *Vacations & Sick Days* shortcut leads to a screen like that shown in Figure 92 - a list of all Vacations and Sick Days taken. You can see what the status is (*Planned*, *Approved*, *Not Approved*, *Cancelled*, *Days Taken*), see how many days are planned (or were taken), the start and end dates of any leave, and what employee was involved.

The *Schedule Vacation* shortcut is used as shown in Figure 93 to create a new Vacation record. Users should create new Vacation records with a status of *Planned* - and wait for it to become *Approved* or *Not Approved*. You will note that the *Days* field need not bear any strict relationship to the Start and End Dates fields. This is because there may be statutory holidays on some of the days taken, or the employee may have only taken a half day on one of the days, etc.. The *Days* value may be a decimal amount, such as 4.5, or 9.25, for instance.

The *Record Sick Days* shortcut is used in a similar fashion to create a record of some Sick Days taken. These entries must be made with the status of *Days Taken*. Again, partial days may be taken, such as .5, 1.25, etc..

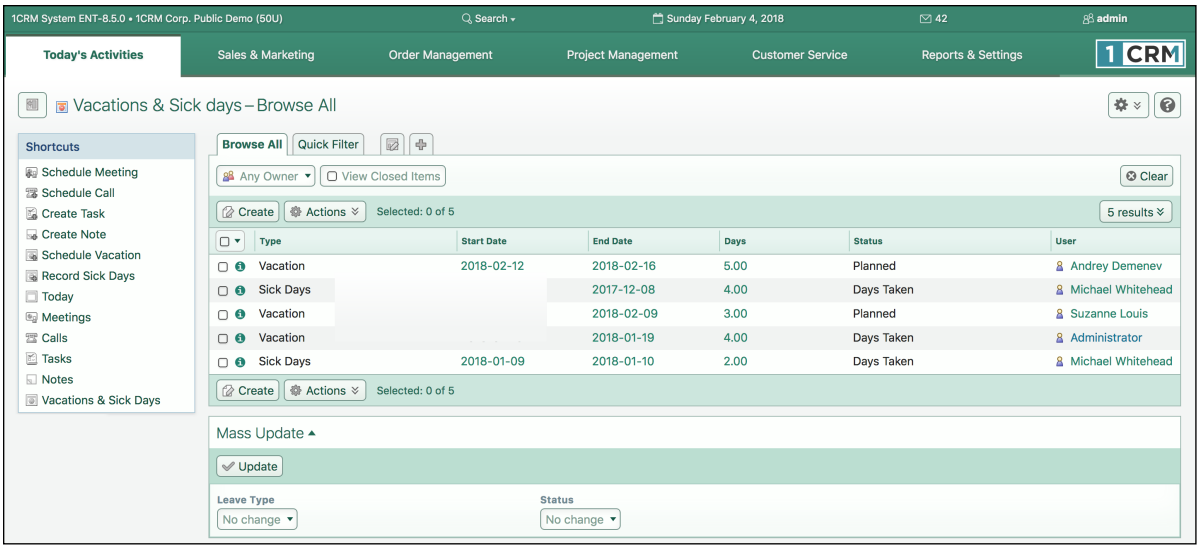


Figure 92: Vacations & Sick Days (List View)

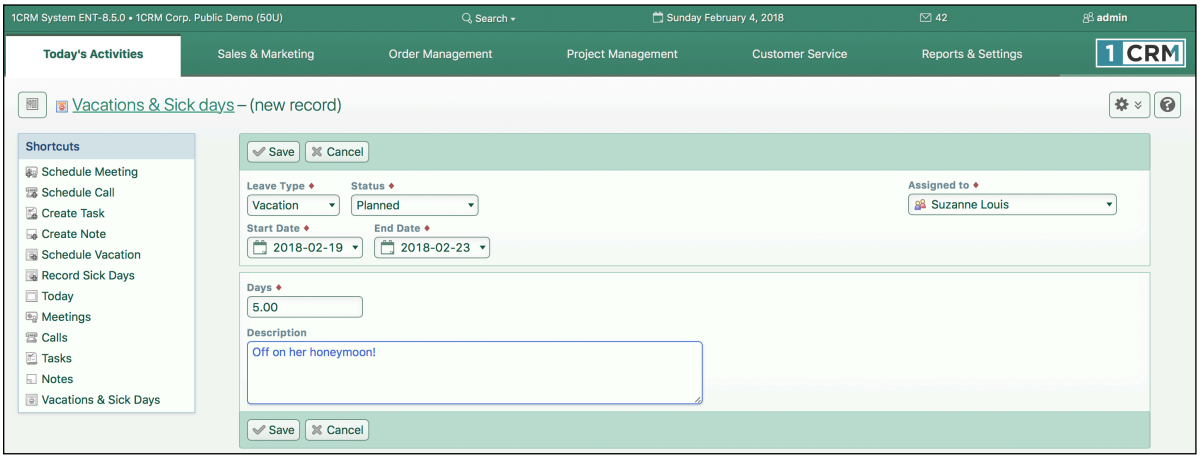
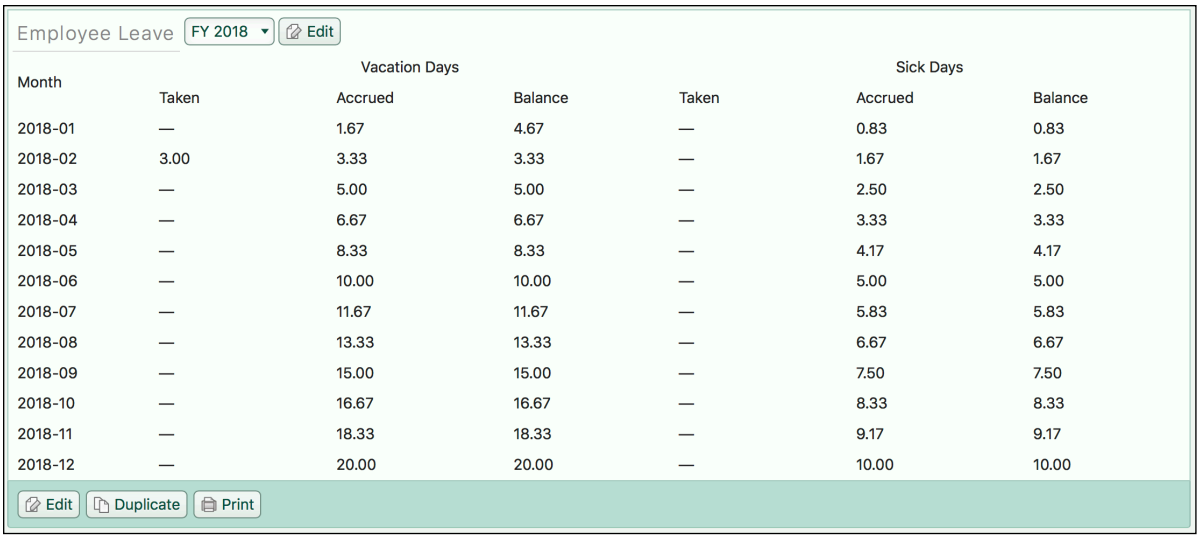


Figure 93: Schedule Vacation

A scheduler task changes all Vacations in the past from a status of *Approved* to a status of *Days Taken*. Both Sick Days and Vacations are marked on the employee's record in HR as having been taken when they have a status of *Days Taken*, as shown in Figure 94 below.



Employee Leave FY 2018 Edit

Month	Vacation Days			Sick Days		
	Taken	Accrued	Balance	Taken	Accrued	Balance
2018-01	—	1.67	4.67	—	0.83	0.83
2018-02	3.00	3.33	3.33	—	1.67	1.67
2018-03	—	5.00	5.00	—	2.50	2.50
2018-04	—	6.67	6.67	—	3.33	3.33
2018-05	—	8.33	8.33	—	4.17	4.17
2018-06	—	10.00	10.00	—	5.00	5.00
2018-07	—	11.67	11.67	—	5.83	5.83
2018-08	—	13.33	13.33	—	6.67	6.67
2018-09	—	15.00	15.00	—	7.50	7.50
2018-10	—	16.67	16.67	—	8.33	8.33
2018-11	—	18.33	18.33	—	9.17	9.17
2018-12	—	20.00	20.00	—	10.00	10.00

Edit Duplicate Print

Figure 94: Employee Leave Record in HR Screen

4.3.14 Calendar Dashlet

The Calendar dashlet is very much the same as the Calendar module. The only differences are that the Calendar Week view does not show Saturday and Sunday, to keep the dashlet a little narrower. And the Day and Week Grid views are not available.

4.4 The Meetings Module

Figure 95 shows the 1CRM screen with the Meetings module selected:

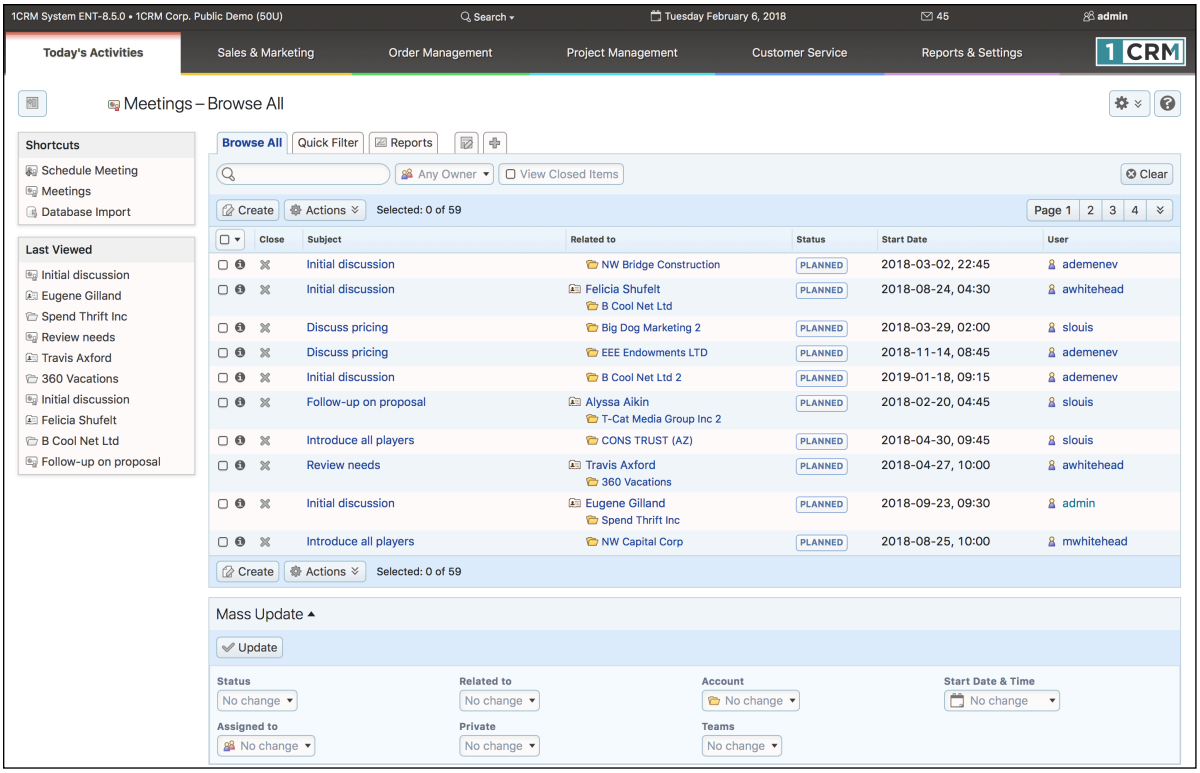


Figure 95: The Meetings Module

The Meetings module lists all the Meetings contained within your 1CRM system, and shows what Contacts and other items in the system they are related to. Meetings are extremely useful for creating reminders of Meetings you need to attend, or records of what was discussed at a Meeting, and linking these Meeting records to a wide variety of other types of information throughout 1CRM. Figure 95 illustrates the initial view for the Meetings module, the Meetings List view.

The Meetings module has a Help icon on the title bar at the top right of the main screen body, followed by a choice of layout tabs, and a list of all or selected Meetings. The Meetings list may be sorted by clicking on any column title that has the icon beside it. Clicking on a column title when it is already the highlighted sort column reverses the sort order.

The Meetings list is paginated if it contains more items than may be listed on the display, and controls are provided to go to the start or end of the list, or step to the next or previous page. Clicking on any Meeting in the list displays the detail information for that Meeting.

Navigation shortcuts are provided to create a new Meeting, or to switch back to the Meetings list view.

Each item in the list has a check box at the left, and at the bottom of the screen is a Mass Update facility which may be expanded to update one or more field values for all checked items.

The Meetings list view provides powerful linking capabilities to related information. Clicking on a Meeting's subject takes you to a detailed view of the specific Meeting. Clicking on the Contact zooms to a detailed view of that Contact, and so on.

Calls, Meetings, Tasks and Notes (all considered *Activities*) are often created by adding them at the History or Activities sub-panel on an Account, Contact or other record in the system.

Note: Some Meetings are marked with a *Booking Appointment* checkbox. These Meetings are created by an integration with the Booking Calendar plugin for WordPress. For more details, see the 1CRM Customer Connection Guide.

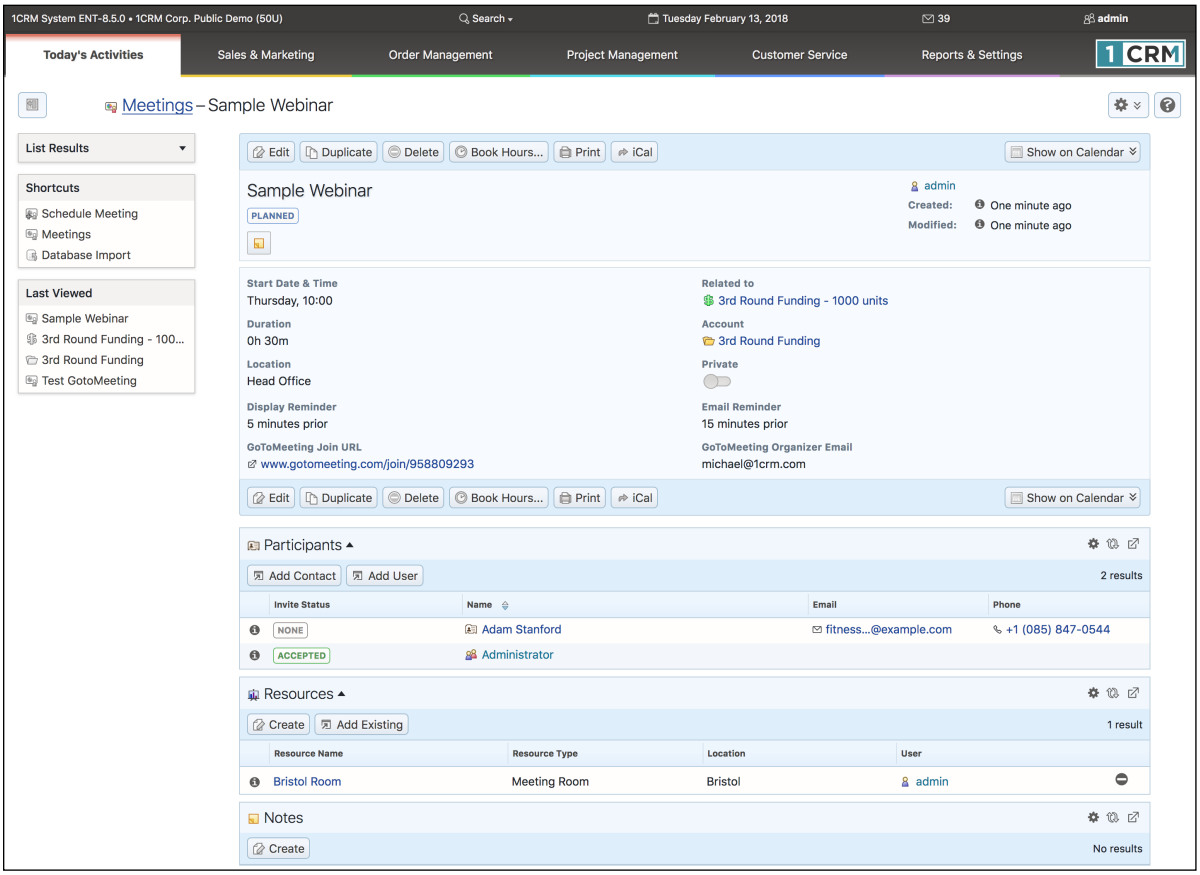


Figure 96: Meeting Detail View

4.4.1 Joining an Online Meeting Session

The Figure above shows the Meeting detail view. As described in the section about the Calendar module, when scheduling a new meeting you can check the box for an Online meeting (GoToMeeting, Zoom, Microsoft Teams, …), and automatically schedule an Online meeting as you create the meeting in your 1CRM system.

Once you *Save* the Meeting in 1CRM, you can at any time join that session by simply clicking on the Online Meeting *Join URL*, as shown in the Figure above.

4.5 The Calls Module

Figure 97 shows the 1CRM screen with the Calls module selected:

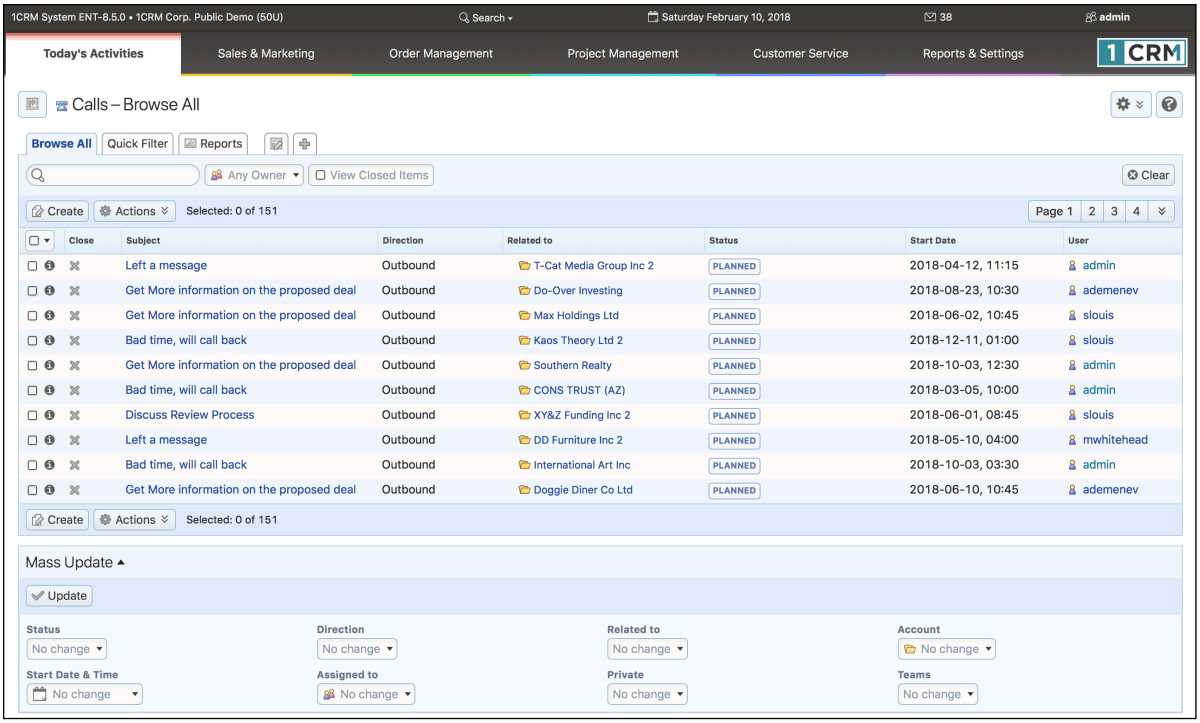


Figure 97: The Calls Module

The Calls module lists all the Calls contained within your 1CRM system, and shows what Contacts and other items in the system they are related to. Calls are extremely useful for creating reminders of Calls you need to make, or records of what was discussed on a Call, and linking these Call records to a wide variety of other types of information throughout 1CRM. Figure 97 illustrates the initial view for the Calls module, the Calls List view.

The Calls module has a Help icon on the title bar at the top right of the main screen body, followed by a choice of layout tabs, and a list of all or selected Calls. The Calls list may be sorted by clicking on any column title that has the icon beside it. Clicking on a column title when it is already the highlighted sort column reverses the sort order.

The Calls list is paginated if it contains more items than may be listed on the display, and controls are provided to go to the start or end of the list, or step to the next or previous page. Clicking on any Call in the list displays the detail information for that Call.

Navigation shortcuts are provided to create a new Call, or to switch back to the Calls list view. Each item in the list has a check box at the left, and at the bottom of the screen is a Mass Update facility which may be expanded to update one or more field values for all checked items.

The Calls list view provides powerful linking capabilities to related information. Clicking on a call's subject takes you to a detailed view of the specific Call. Clicking on the Contact zooms to a detailed view of that Contact, and so on.

Calls, Meetings, Tasks and Notes (all considered *Activities*) are often created by adding them at the History or Activities sub-panel on an Account, Contact or other record in the system.

4.6 The Tasks Module

Figure 98 shows the 1CRM screen with the Tasks module selected:

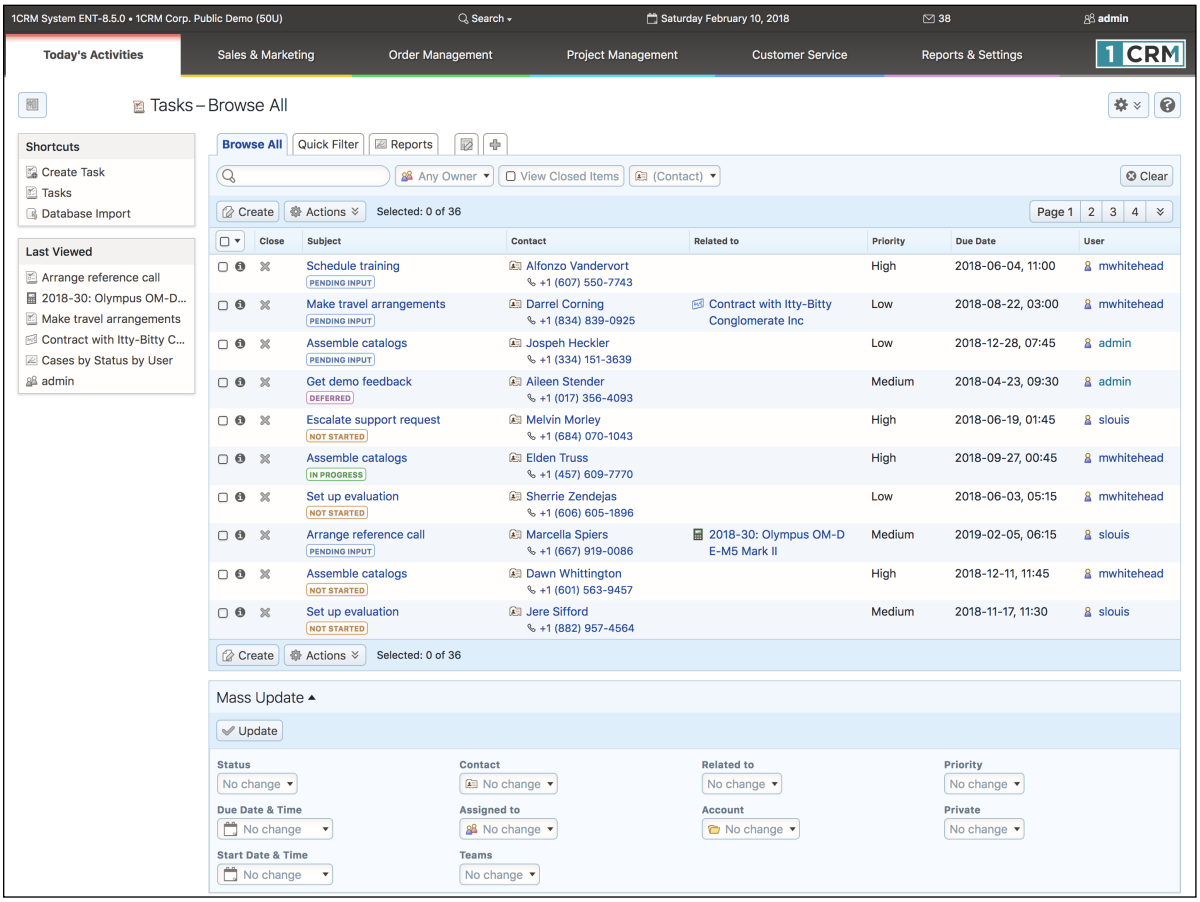


Figure 98: The Tasks Module

The Tasks module lists all the Tasks contained within your 1CRM system, and shows what Contacts and other items in the system they are related to. Tasks are a key capability within 1CRM, used to record all manner of to-do items, and relating them to a wide variety of records throughout the system. Figure 98 illustrates the initial view for the Tasks module, the Tasks List view.

The Tasks module has a Help icon on the title bar at the top right of the main screen body, followed by a choice of layout tabs, and a list of all or selected Tasks. The Tasks list may be sorted by clicking on any column title that has the icon beside it. Clicking on a column title when it is already the highlighted sort column reverses the sort order.

The Tasks list is paginated if it contains more items than may be listed on the display, and controls are provided to go to the start or end of the list, or step to the next or previous page. Clicking on any Task in the list displays the detail information for that Task. Navigation shortcuts are provided to create a new Task, or to switch back to the Tasks list view. Each item in the list has a check box at the left, and at the bottom of the screen is a Mass Update facility which may be expanded to update one or more field values for all checked items.

The Tasks list view provides powerful linking capabilities to related information. Clicking on a task's subject takes you to a detailed view of the specific Task. Clicking on the Contact zooms to a detailed

view of that Contact, and so on. Calls, Meetings, Tasks and Notes (all considered *Activities*) are often created by adding them at the History or Activities sub-panel on an Account, Contact or other record in the system.

4.7 The Notes Module

Figure 99 shows the 1CRM screen with the Notes module selected:

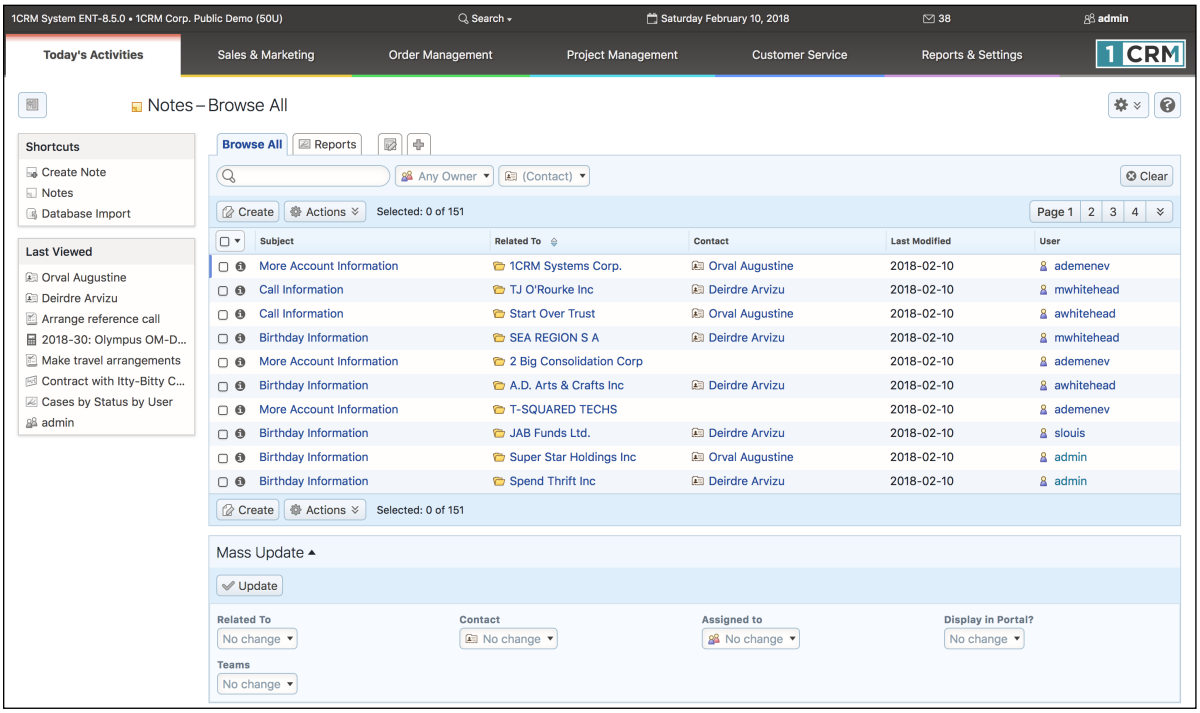


Figure 99: The Notes Module

The Notes module lists all the Notes contained within your 1CRM system, and shows what Contacts and other items in the system they are related to. Notes are extremely useful for creating brief notes, or attaching substantial documents, spreadsheets, proposals or images to a wide variety of records throughout 1CRM. Figure 99 illustrates the initial view for the Notes module, the Notes List view.

The Notes module has a Help icon on the title bar at the top right of the main screen body, followed by a choice of layout tabs, and a list of all or selected Notes. The Notes list may be sorted by clicking on any column title that has the icon beside it. Clicking on a column title when it is already the highlighted sort column reverses the sort order.

The Notes list is paginated if it contains more items than may be listed on the display, and controls are provided to go to the start or end of the list, or step to the next or previous page. Clicking on any Note in the list displays the detail information for that Note. Navigation shortcuts are provided to create a new Note, or to switch back to the Notes list view. Each item in the list has a check box at the left, and at the bottom of the screen is a Mass Update facility which may be expanded to update one or more field values for all checked items.

The Notes list view provides powerful linking capabilities to related information. Clicking on a note's subject takes you to a detailed view of the specific Note. Clicking on the Contact zooms to a detailed view of that Contact, and so on.

Calls, Meetings, Tasks and Notes (all considered *Activities*) are often created by adding them at the History or Activities sub-panel on an Account, Contact or other record in the system.

4.8 The Email Module

Figure 100 shows the 1CRM screen with the Email Module selected using the Email tab:

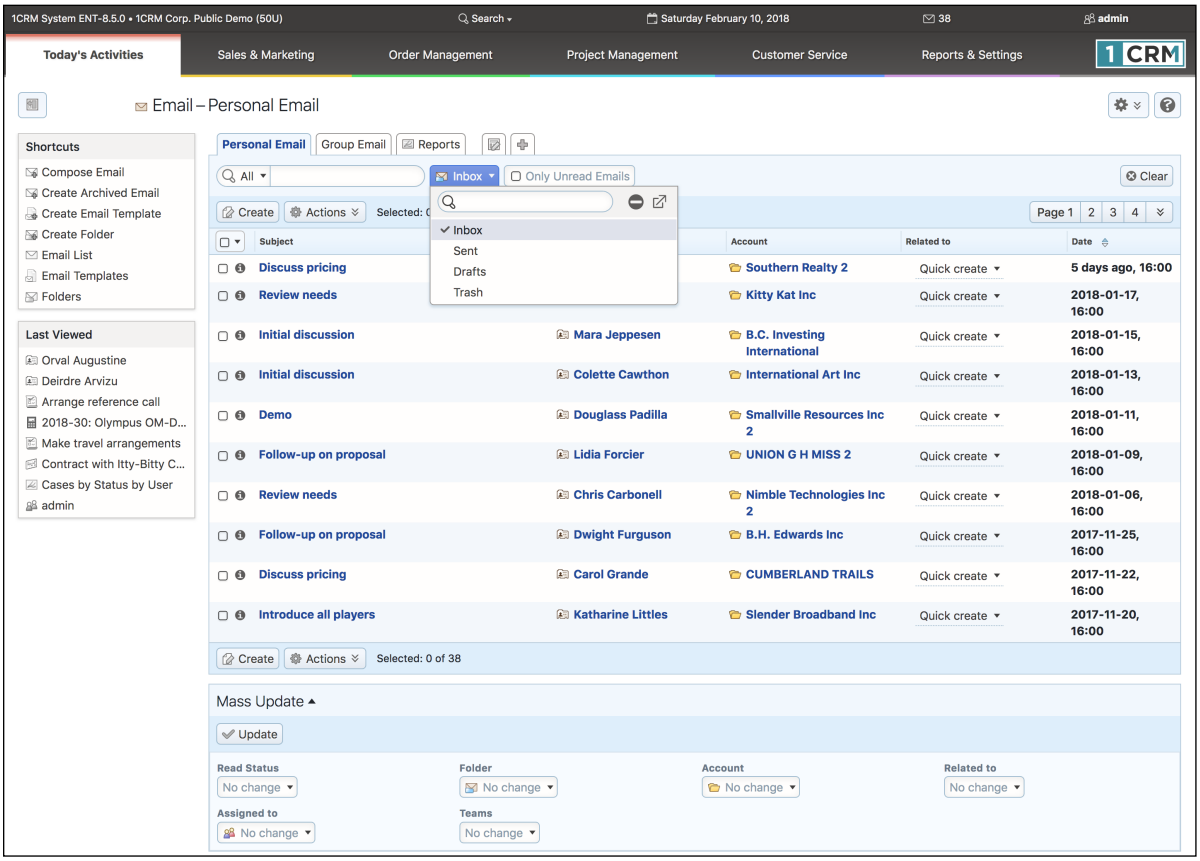


Figure 100: The Email Module – Email List View Screen

The Email module helps you compose draft emails and save them to be sent at a later date, or send them right away. You may also create email templates which reference variable fields from Account or Contact records, so that when you send a new Email using an email template, variable data from the related Account or Contact will automatically be inserted in the email. Emails may be associated with Contacts, Accounts, Opportunities, Cases, Leads, Supported Products, Projects, or Bugs.

The Email module also lets you receive incoming email (including attachments) from one or more POP3 or IMAP email accounts – which you may specify in your My Account settings – and reply to or forward these emails. As well, users may create personal mail folders, and move email between folders. Deleted email goes to the Trash folder – and email deleted from the Trash folder is completely deleted, including attachments. Settings on your My Account page control the automated removal from the system of email, based on configurable conditions.

The Email module has a Help icon on the title bar at the top right of the main screen body, followed by a choice of layout tabs, and a list of all or selected Email messages. A filter is provided (see dropdown in figure above) to display the mail within any standard or user-defined folder. The Actions button lets you *Trash* or *Delete* selected emails, and also *Print* them in a useful PDF format.

The Email list may be sorted by clicking on any column title that has the ⇕ icon beside it. Clicking on a column title when it is already the highlighted sort column reverses the sort order. The Email list is paginated if it contains more items than may be listed on the display. Controls are provided to go to the start or end of the list, or step to the next or previous page.

Clicking on the subject of any Email in the list displays the detailed text of that message. Clicking on the Contact link displays the Contact to whom the mail was addressed, and clicking on the Related to link displays the related Account, Opportunity, Case, Lead, Product, Project, or Bug information.

Navigation shortcuts are also provided to Compose and send a new email, to Create or View Email Templates, to Create a new email folder or view the current list of folders.

Note: Before you use the Email module, go to the *Email Options* tab of your *My Account* page and setup the information below. Notice the Create button on a Monitored Mailboxes sub-panel at the bottom of the My Account screen (once the *Email Options* tab is selected - and before you click on *Edit*), which you need to use to receive email. See Section 10.1.10 for setup details.

- *Email address* – Your main email address. ***Note:*** This must be set properly in order to receive email notifications.
- *Reply-to name* – your name as you wish email recipients to see it.
- *Reply-to address* – the email address you want people to use when emailing back to you.
- *Email Signature* – your name and/or contact information, for automatic inclusion at the end of each email you send.
- *Email client* – typically leave this set to *System Default Mail Client.* This controls what happens when you click on a hyperlinked email address within 1CRM – does it take you to the Create Email screen within 1CRM – or does it fire up an external email client.
- *Default display format* – choose HTML (richer display capabilities) or Plain Text.
- *Default send format* – choose HTML (richer email composition capabilities) or Plain Text.
- *Inline images* – choose Hide or Display (usually display, unless you have low bandwidth).
- *Messages in Trash Cleanup* – Options are to *Never Delete* (default), or to keep email in trash for a period of from 5 days to 1 year. This option, and the next four options, are there to help keep the volume of email in 1CRM to manageable proportions, to keep system email performance optimized. Email messages that are cleaned up are deleted, along with their attachments.
- *Received messages without associations cleanup:* Specifies retention period for received messages that are not related to any other data object in the system. This would be an email message received from someone that is not a Contact, and therefore less likely to be of value as business history.
- *Received messages with associations cleanup:* Specifies retention period for received messages that are related to at least one other data object in the system – such as an Account, Contact, Project, etc... Usually this would be at least 3 months, and often 6 or more.
- *Sent messages without associations cleanup:* Specifies retention period for sent messages that are not related to any other data object in the system. This would be an email message sent to someone other than a Lead or Contact, and therefore not likely to be of value as business history.
- *Sent messages with associations cleanup:* Specifies retention period for sent messages that are related to at least one other data object in the system – such as an Account, Contact, Project, etc... Usually this would be at least 3 months, and often 6 or more.
- *Mail transfer agent* – your administrator will tell you if this needs to be set for Sendmail or SMTP. On a Linux server, Sendmail can be easier to configure, but SMTP causes fewer issues with your emails being seen as SPAM. See section 10.1.9 for setup details.

When an email is opened, the user sees the Email Detail View, which allows the user to *Reply* to an email, *Reply All*, *Forward* it, *Delete* it, *Edit* it or *Duplicate* it. From the Email List View screen, multiple emails may be selected using check boxes to their left, and trashed or moved to another email folder for the current user using the Mass Update panel.

Emails which are composed and sent from within 1CRM may take advantage of the email signature feature, which may be set in the user's My Account area. When composing an email, an attachment may be uploaded from the user's client computer. As well, Documents may be attached from the 1CRM Document repository.

To choose who to send the email to, just click on Add recipient(s) and enter the first few letters of a Contact or Lead's first or last name and a list of possible suggestions will appear, from which you can select the one you want. Or click on to do a full search. You can also enter an email address not known in your CRM, as a custom entry.

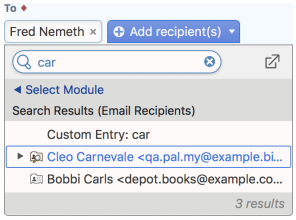


Figure 101: Selecting Email Recipients

You can click to expand the CC and BCC addressee options, and you can drag and drop addressees between the TO, CC and BCC lists.

To retrieve email from one or more Monitored Mailboxes, add them on the *Email Options* tab of your *My Account* page, by clicking the Create button on the *Monitored Mailboxes* sub-panel of the Detail View.

You can retrieve your incoming mail two ways:

- If your 1CRM system is set up to use the Scheduler to regularly poll for incoming email, and if when you add a new monitored mailbox you select the *Scheduled Retrieval* check box, your email will be read into your Inbox automatically at the time of each poll.
- You may click on the *Check Email* button (towards the top of every screen) at any time, whether or not your mailboxes are being polled regularly.

In addition to the fairly conventional user email features described above, 1CRM also offers Group email. Multiple email accounts (such as support@company.com, or info@company.com) may be designated by the administrator to be monitored (see Admin - Email - Group Inboxes), and any email received will automatically be placed in the Group email folder specified. Users may:

- View the entire contents of all Group email (by selecting the *Group Email* tab as shown on Figure 100), or of any specific Group email folder
- Take email from any Group email folder and place it in one of their personal email folders
- Return emails from their personal email folders to any selected Group email folder

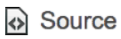
4.8.1 HTML Editor

When composing an HTML email (or editing HTML in many other parts of the system, such as product descriptions, custom login message or email signatures), you may take advantage of an advanced HTML editor within 1CRM. This editor includes rich text formatting features, and image management capabilities. To use this feature if it is minimized, simply click on the down arrow icon

shown as item 1 in Figure 102. This will expand the top bar on the compose window, as shown in Figure 103.

The HTML editor functions are summarized in a table below:

HTML Editor Functions

Icon	Function
	Cut the highlighted text to the clipboard.
	Copy the highlighted text to the clipboard.
	Paste the data copied to the clipboard (with or without formatting).
	Paste content copied from Microsoft Word or similar applications.
	Undo or redo the most recent action taken.
	Find a word or phrase within the document.
	Find and replace a word or phrase within the document.
	Select the entire text in the document.
	Click to use the image browser to upload images, and to select for use in editor.
	Creates a table with the defined number of columns and rows.
	Inserts a divider line (horizontal rule).
	Inserts symbols & special characters (accented characters, trademark, currency symbol, etc.).
	Converts or removes the text in hyperlinks. It may also by used to manage file uploads and links to files on the web server.
	Inserts or modifies a link anchor
	Preview what the HTML page will look like for users.
	Maximizes the editor inside the browser. Click again to revert to normal editing.
	View or edit the document source code (for advanced users).
	Shows information about the CKEditor.
Row 2	**Function**
	Applies **bold**, *italic* or ~~strikethrough~~ formatting to the highlighted text.
	Changes the color of the text.
	Changes the background color of the text.
	Sets the text alignment (left, centered or right).
	Remove the formatting from the highlighted text.
	You may use these drop down controls to set text styles, fonts, and size. To remove the applied style select the style name again.
	Creates numbered or bulleted lists.
	Increase or decrease the text indentation.
	Format a block of text to identify quotations.

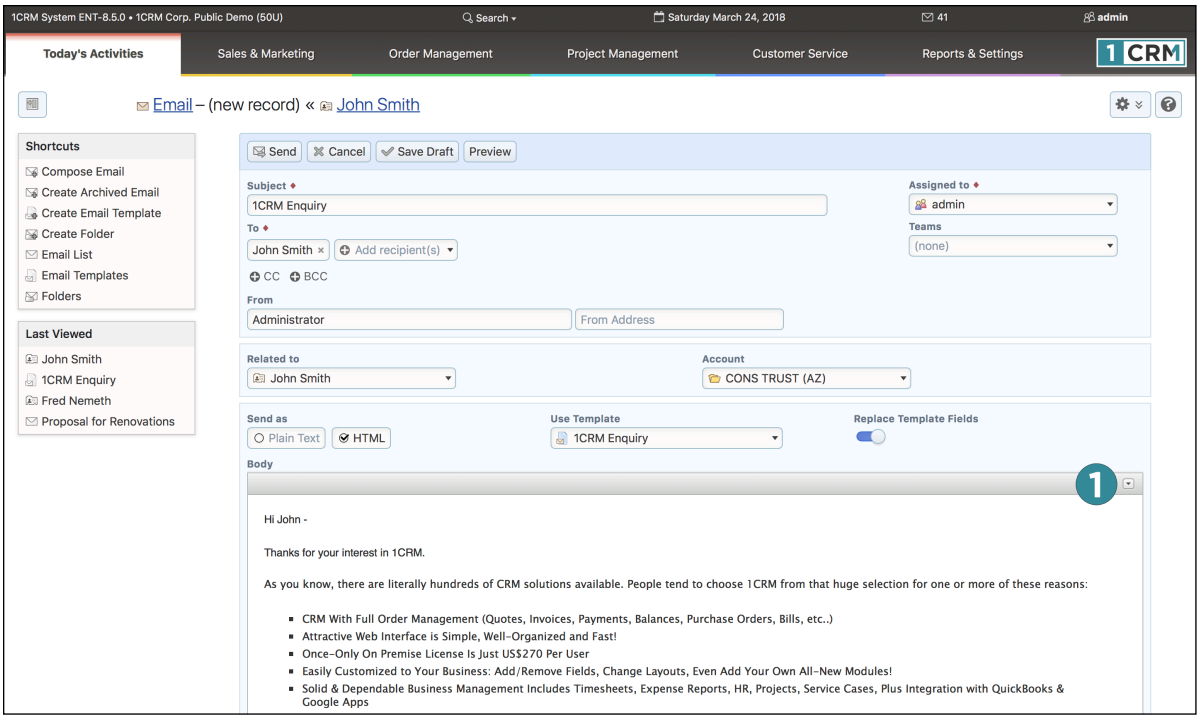


Figure 102: Composing an Email

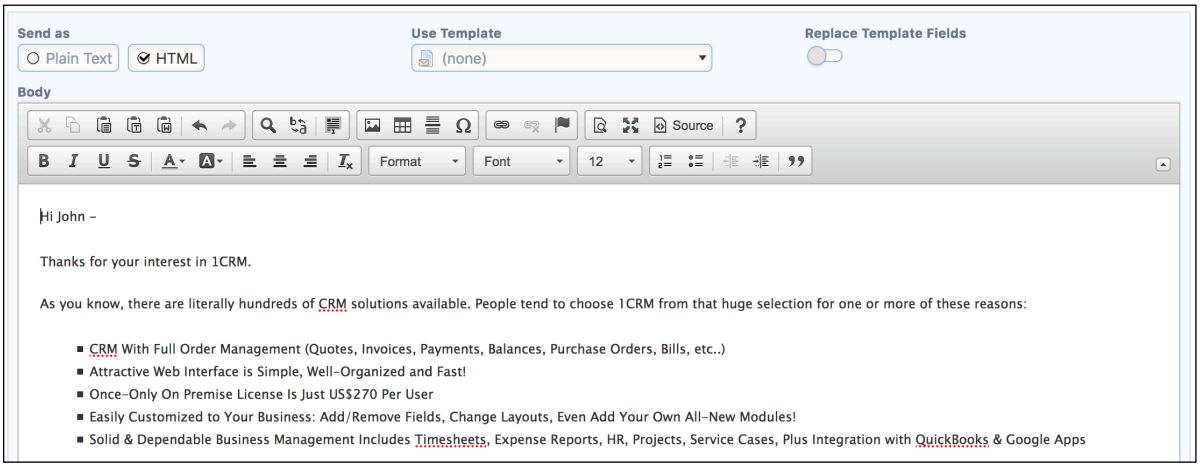


Figure 103: HTML Editor Control Panel

4.8.2 Uploading and Using Images in HTML

You can use the Image Browser to select existing images for use in your HTML document.

- Click on the icon to open the editor, then click on the Image Browser icon to bring up the Image Properties dialog box (see Figure 104).
- You can manually enter the URL of an external image, and just click on OK.

Note: Make sure the images you use may be accessed by anyone on the Internet.

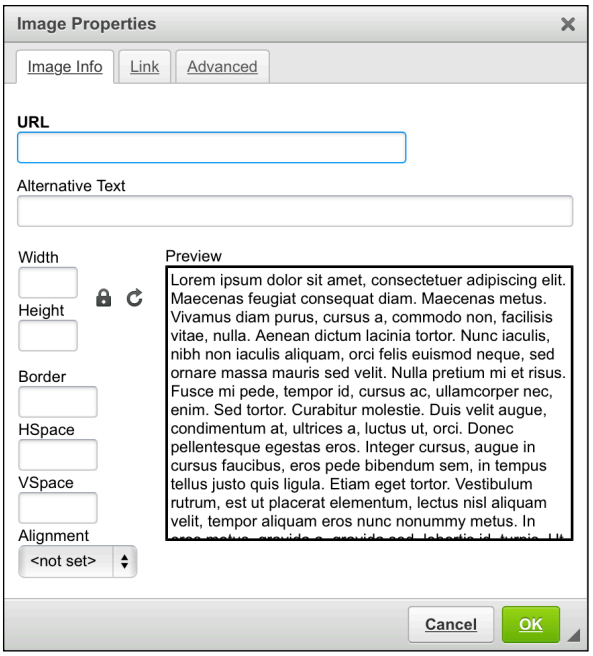


Figure 104: Image Properties Dialog Box

4.8.3 Advanced Editing

A very handy technique for advanced editing is to edit an HTML document just as you like it in a dedicated editor such as DreamWeaver, and copy the HTML source of that document to your clipboard. Then go to the HTML editor in 1CRM and click on Source, and paste all the HTML source into that window. Click on Source again to turn it off, and then *Save*.

Figure 105: Advanced Editing by Pasting in *View Source* Mode

4.9 The Forums Module

Figure 106 shows the 1CRM screen with the Forums Module selected:

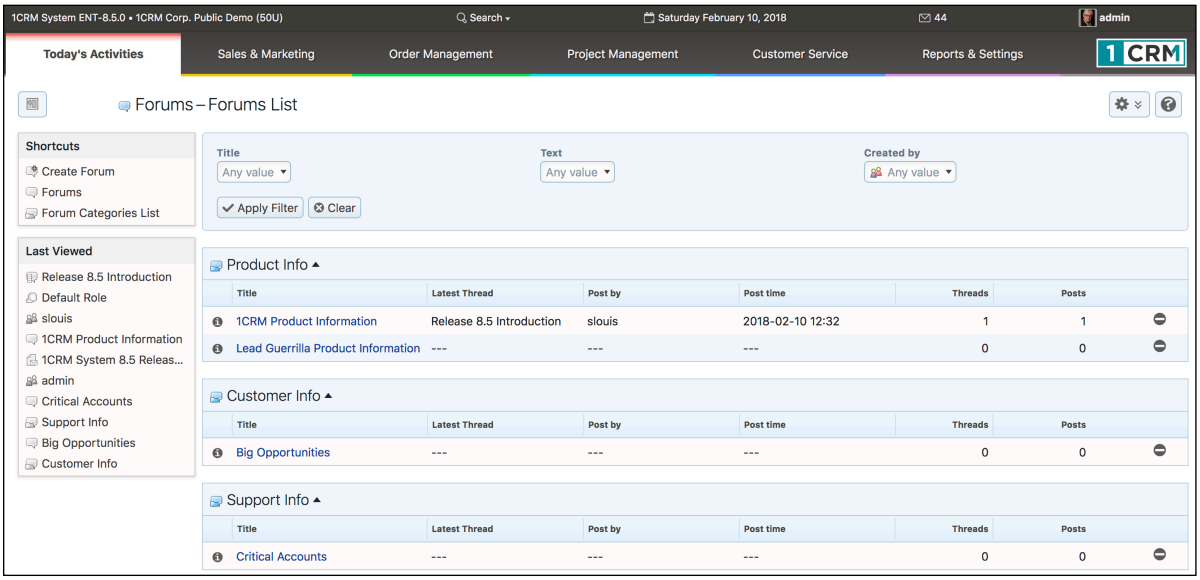


Figure 106: The Forums Module

The Forums module is designed to permit ongoing discussions within the CRBM system. In order to use this module, one or more Forum Categories must first be defined by an Administrator, using the *Forum Categories List* shortcut shown in the figure above.

Then, new forum threads must be created, and each thread must be within an established category. Forum threads are listed as above, organized by Category.

Once you have created a thread, any user may reply to it, as shown in Figure 107. That is the basic manner in which Forums and Threads are used. But there are several more powerful aspects to this module:

- There is a Forum dashlet which can show the latest Forum Threads that have been updated
- Users can subscribe/unsubscribe to a Thread, and subscribers receive a notification email whenever new replies are added to the Thread
- Threads may be related to Accounts, Opportunities, Cases and Software Bugs

To view the Forums dashlet, simply go to any dashboard page, and use the *Add Dashlets* button to add the Forums dashlet to the dashboard, as shown in Figure 108.

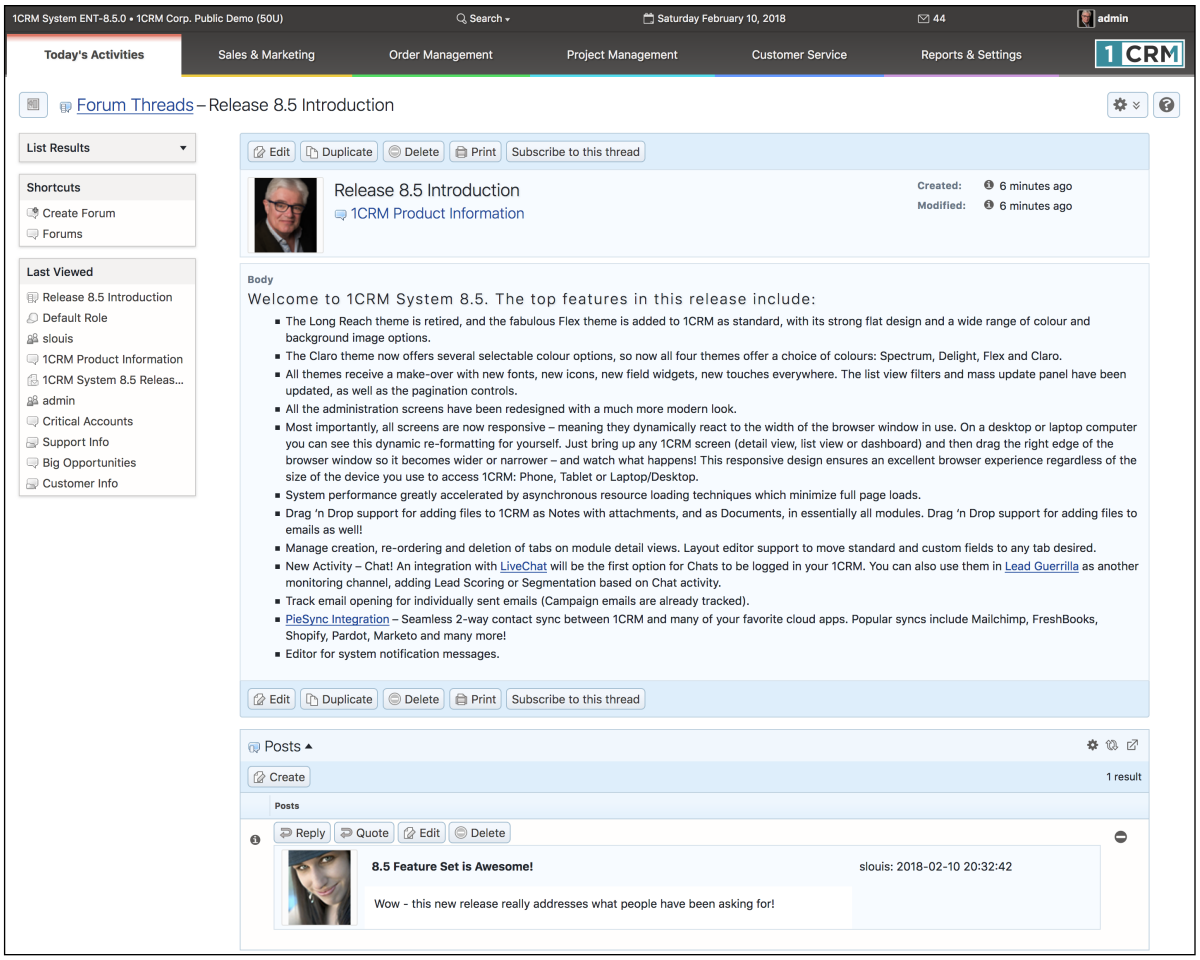


Figure 107: A Forum Thread

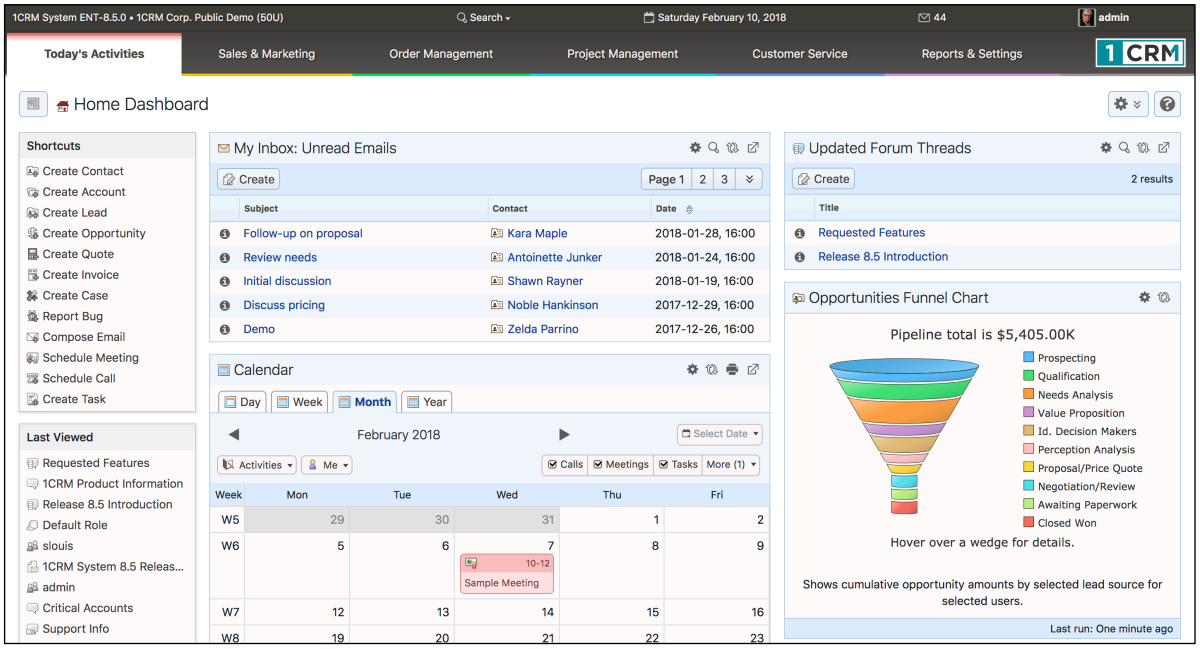


Figure 108: Forums Dashlet

To subscribe to a Forum Thread, simply click on the *Subscribe to this thread* link (see Figure 107). You will see this message:

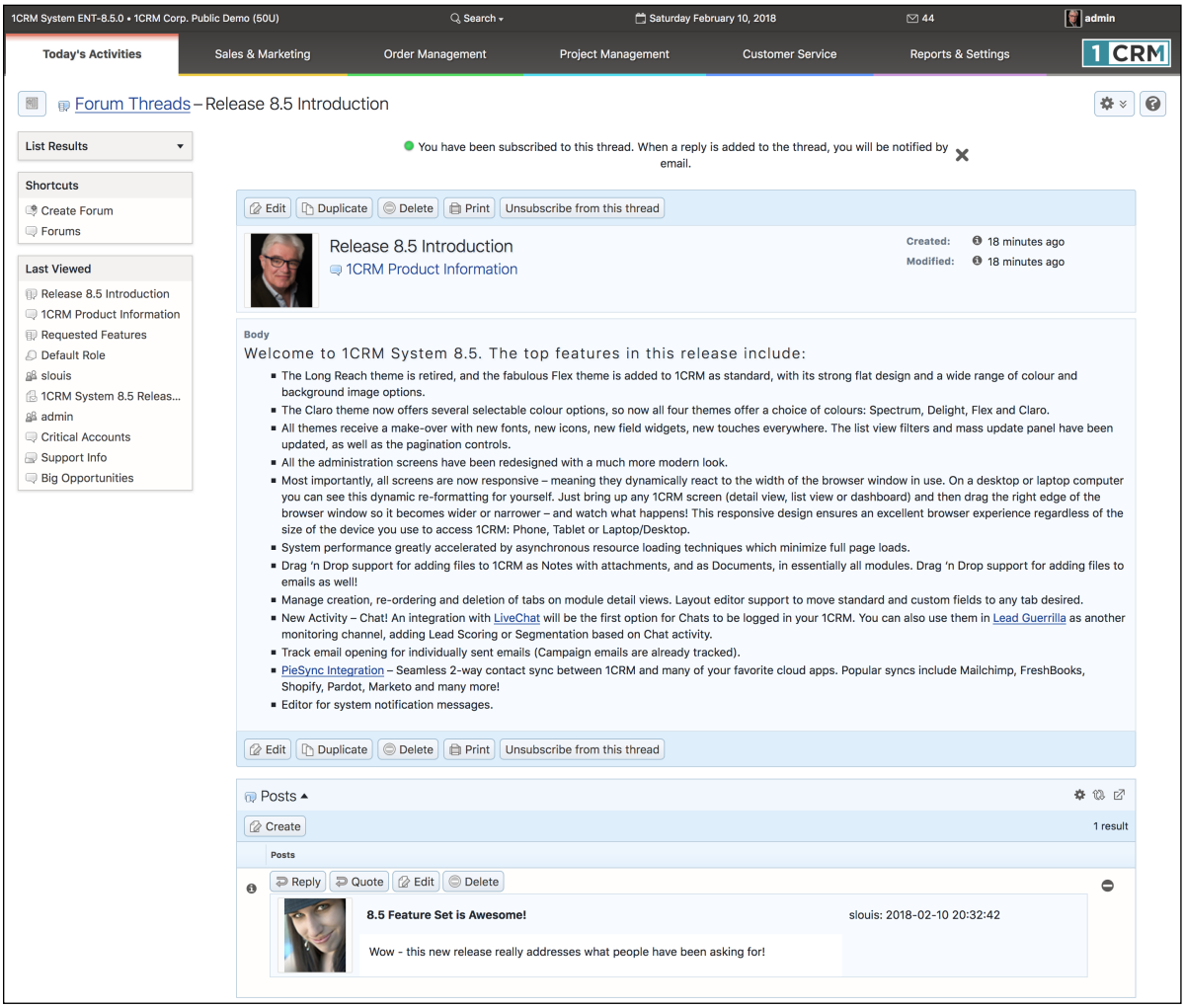


Figure 109: Subscribing to a Thread

4.10 The Chats Module

Figure 110 shows the 1CRM screen with the Chats Module selected:

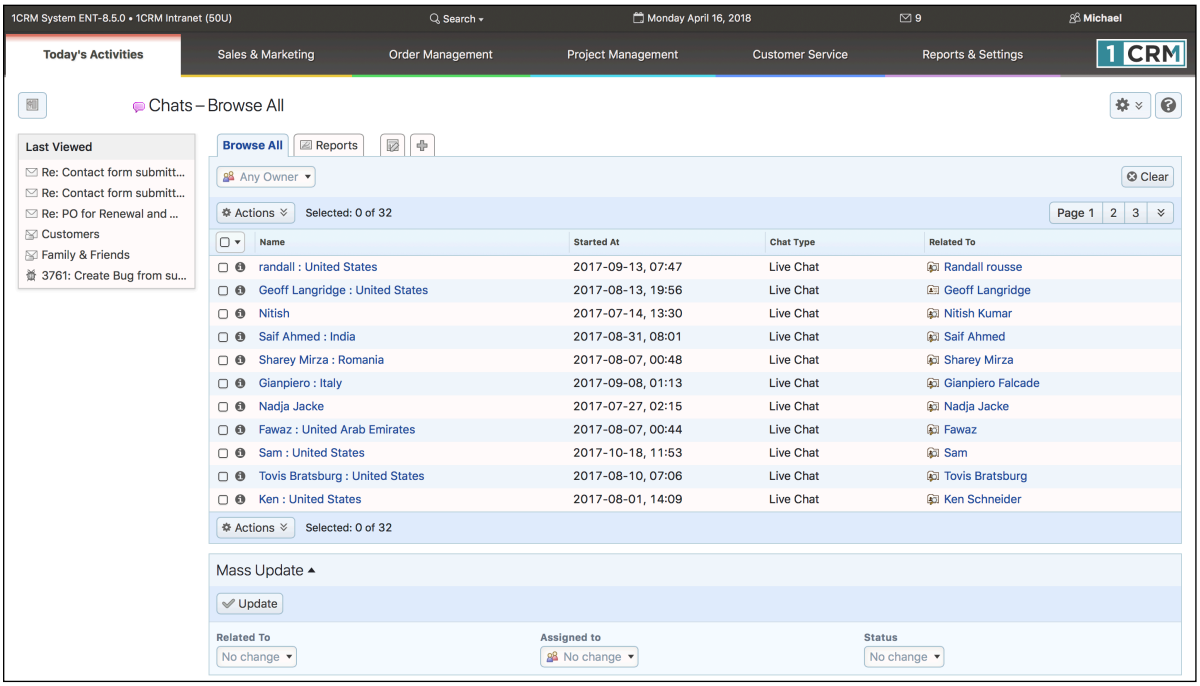


Figure 110: The Chats Module

The Chats module holds Chats passed into the CRM from an integrated website chat system such as LiveChat. Completed Chats are displayed as part of the History sub-panel on Leads and Contacts, offering another useful source of information about a form of customer contact (often known as a customer *Touch*).

See this webpage for details of how this integration is setup by your system administrator. Each user must also add a configuration setting on the *Integrations* tab of their *My Account* page.

The Chats module has a Help icon on the title bar at the top right of the main screen body, followed by a choice of layout tabs, and a list of all or selected Chats. The Chats list may be sorted by clicking on any column title that has the icon beside it. Clicking on a column title when it is already the highlighted sort column reverses the sort order.

The Chats list is paginated if it contains more items than may be listed on the display, and controls are provided to go to the start or end of the list, or step to the next or previous page. Clicking on the *Name* of any Chat in the list displays the detail information for that Chat. Navigation shortcuts are provided to create a new Chat, or to switch back to the Chats list view. Each item in the list has a check box at the left, and at the bottom of the screen is a Mass Update facility which may be expanded to update one or more field values for all checked items.

The Chats list view provides the ability to link the Lead or Contact related to each Chat. Clicking on a Chat's *Related To* value takes you to a detailed view of the specific Lead or Contact.

5.0 Sales & Marketing

5.1 The Accounts Module

Figure 111 shows the 1CRM screen with the Accounts Module selected using the Accounts navigation tab:

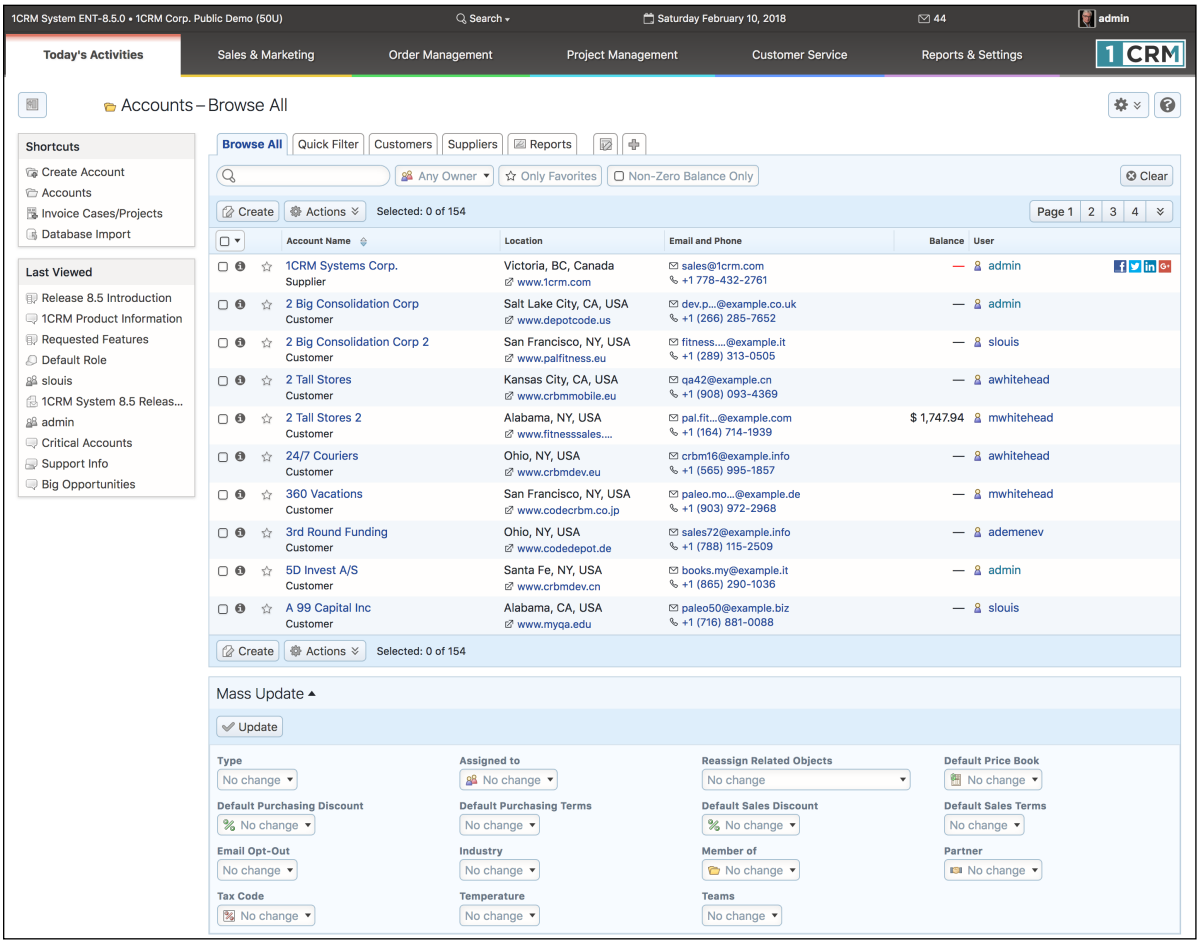


Figure 111: The Accounts Module List View

The Accounts module is the heart of any CRM system. All other data in the system is typically linked either directly to an Account, or to other information that is linked directly to an Account. An Account is any organization that has some relationship with yours.

The Accounts module has a Help icon on the title bar at the top of the main screen body, followed by a choice of layout tabs, and a list of all or selected Accounts. The Account list may be sorted by clicking on any column title that has the icon beside it. Clicking on a column title when it is already the highlighted sort column reverses the sort order.

Navigation shortcuts are provided to create a new Account, or to import bulk Account data from Salesforce.com, ACT!, etc…

The Account list is paginated if it contains more items than may be listed on the display. Controls are provided to go to the start or end of the list, or step to the next or previous page. Clicking on any Account in the list displays the detail information for that Account.

Each Account listed shows the Account Receivable balance (and Payable Balance if they are a Supplier), based on a calculation of all open Purchase Orders for that account, less any payments applied to those Purchase Orders. Credit limit, default terms, default discounts, etc.. may be all defined for both the Customer and Supplier relationship.

Also notice the links to social network accounts available on the far right for each Account.

5.1.1 Printing Monthly Statements

A unique control in the filter panel lets you filter out all accounts with a zero account balance, to concentrate on those Accounts that do have a receivable balance. As well, note if you click on the Actions button, you see an option to *Print Statements as PDF*. By combining the filter with the use of the *Check All* feature, and this button, you can quickly and easily print statements at month end for all Accounts with a non-zero balance. Once you have a number of Accounts selected using the check box to the left of them, select the *Print Statements as PDF* function, and you will receive a downloaded PDF at the browser interface. This PDF will contain a statement for each Account selected, with all of the statements joined together into one long PDF.

5.1.2 Emailing Monthly Statements

The *Email Statements as PDF* option is similarly accessed via the Actions button. Simply select one or more Accounts from the list view use this function to email them each an Account statement (optionally including all unpaid invoices) in PDF form using a defined email template. To use this feature, you should first ensure that each Account has at least one Contact with the *Accounting Contact* check box enabled, that your own email settings have been configured, and that you have created a suitable email template.

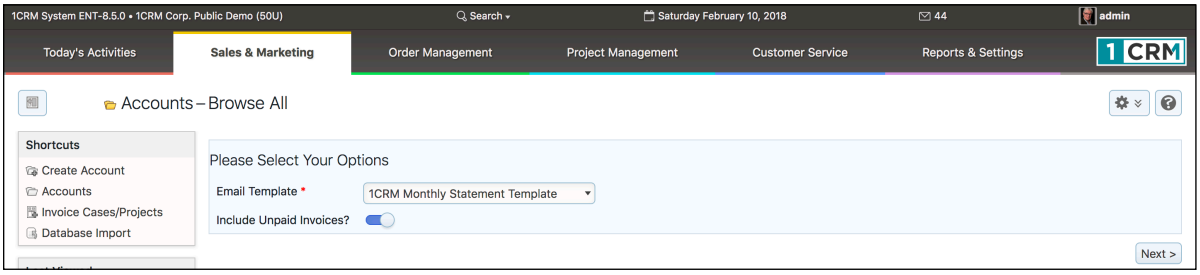


Figure 112: Emailing Monthly Statements - Step One

Select the Accounts you wish to receive an emailed statement, then click on the *Email Statements as PDF* button. You will see the Step One screen as shown in Figure 112. Select the Email Template you wish to use, and whether or not unpaid Invoices should also be attached. Then click on *Next* to proceed to Step Two, as shown in Figure 113.

Step Two confirms the emails that are about to be sent, and lets you check every detail of them. Step Three (see Figure 114) confirms the emails that have been sent, or shows any errors that arise while sending the emails. Then just click on the Finish button to return to the Accounts list view.

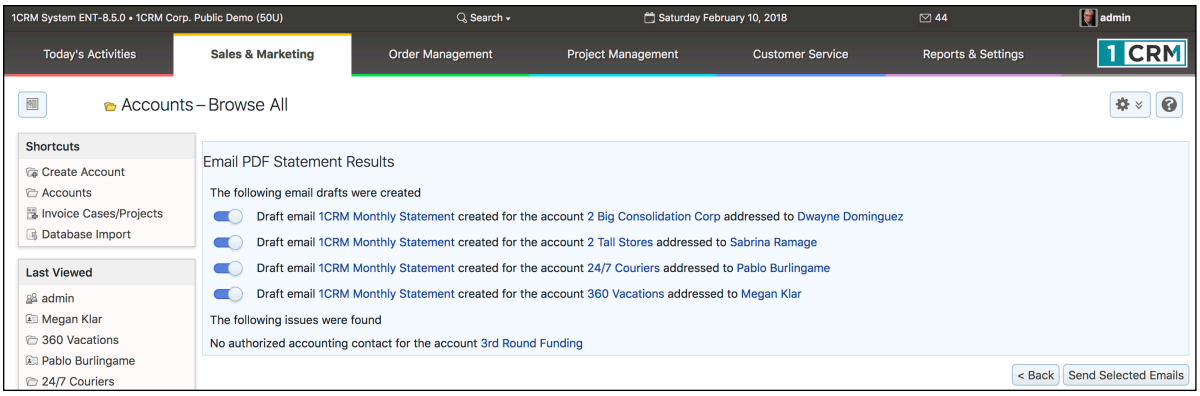


Figure 113: Emailing Monthly Statements - Step Two

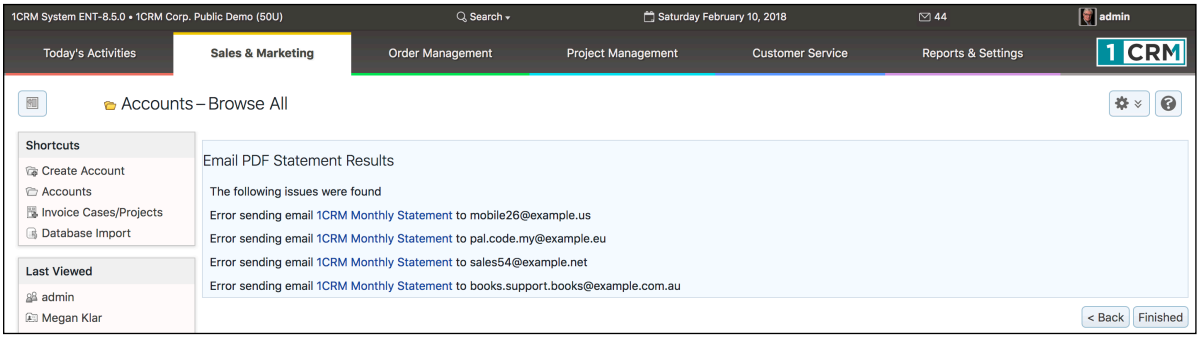


Figure 114: Emailing Monthly Statements - Step Three

5.1.3 Invoicing for Time Booked to Projects and Cases

Within the Accounts module, you may use the shortcut *Invoice Cases/Projects* to generate and email invoices for time that has been booked to Cases and Projects. For more details please see the section describing the Invoices module.

5.1.4 Re-Assigning Accounts

In the Mass Update panel for the Accounts Module (see Figure 115), there is a field to Mass Update the *Assigned To* value for Accounts. This is extremely handy for reassigning Accounts from one user to another. Next to that field is another field to *Reassign Related Objects*. Using this field together with the *Assigned To* field, you can reassign not just Accounts, but all data related to those Accounts. When re-organizing sales territories, or replacing a departed salesperson, you will find this capability invaluable.

You use these fields as follows:

1. Select Accounts to be reassigned from one user to another
2. Set the *Assigned To* user (to whom all selected Accounts are to be reassigned) in the appropriate field
3. Select all the related types of data which should also be reassigned to the new user on the *Reassign Related Objects* multi-select field
4. Click on the *Update* button of the Mass Update panel to complete the process

All the selected Accounts, plus all the information items of the types selected that are related to those Accounts, will now be reassigned to the new user.

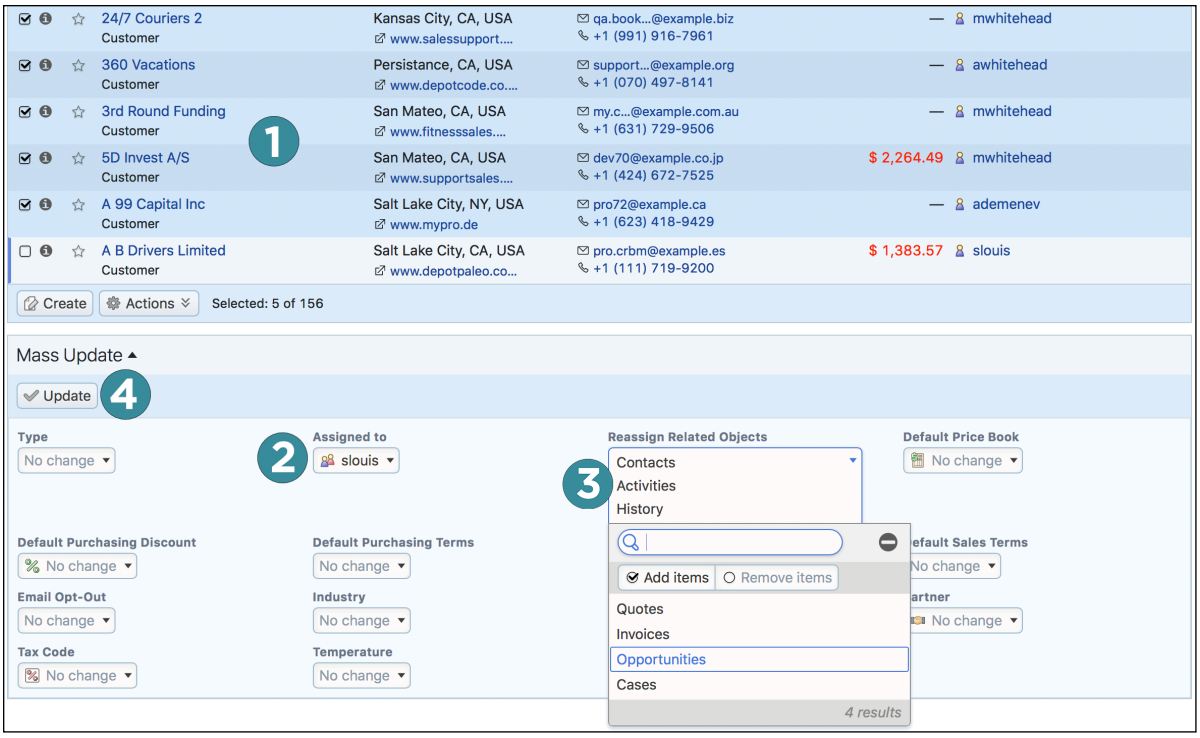


Figure 115: Re-Assigning Accounts

5.1.5 Copying Account Addresses to Related Contacts

One of the nice features of a CRM is that Contacts and Accounts are different things - one is the business you sell to, and the other is a person that works there. But sometimes this can be a bit inconvenient, and one of the most inconvenient times is when the Account has a change of address. If you have half a dozen Contacts at that Account, you might have to enter the new address information for the Account, and then for each Contact as well.

To save you from having to do that, 1CRM has a special feature for copying the Account address across to the Account's Contacts. In Figure 116 towards the bottom you can see the *Copy to...* links just under the Billing and Shipping addresses in the Account edit view. If you click on one of them, you'll see a dropdown list with the options *--None--*, *Shipping Address*, *Primary Address of Contacts*, *Other Address of Contacts*, and *Both Addresses of Contacts*. Choose one of the last three options to update the *Primary* and/or *Other* addresses for all of the Contacts related to this Account. Then *Save* the Account record (see message at top of screen in Figure 116) to copy the address information from the Account to the Contacts. If you change your mind, you can revert to the *--None--* option before you *Save* the Account. The *Shipping Address* option is used to copy the Account Billing Address to the Account Shipping Address. A similar option is available to copy the Shipping Address to the Billing Address.

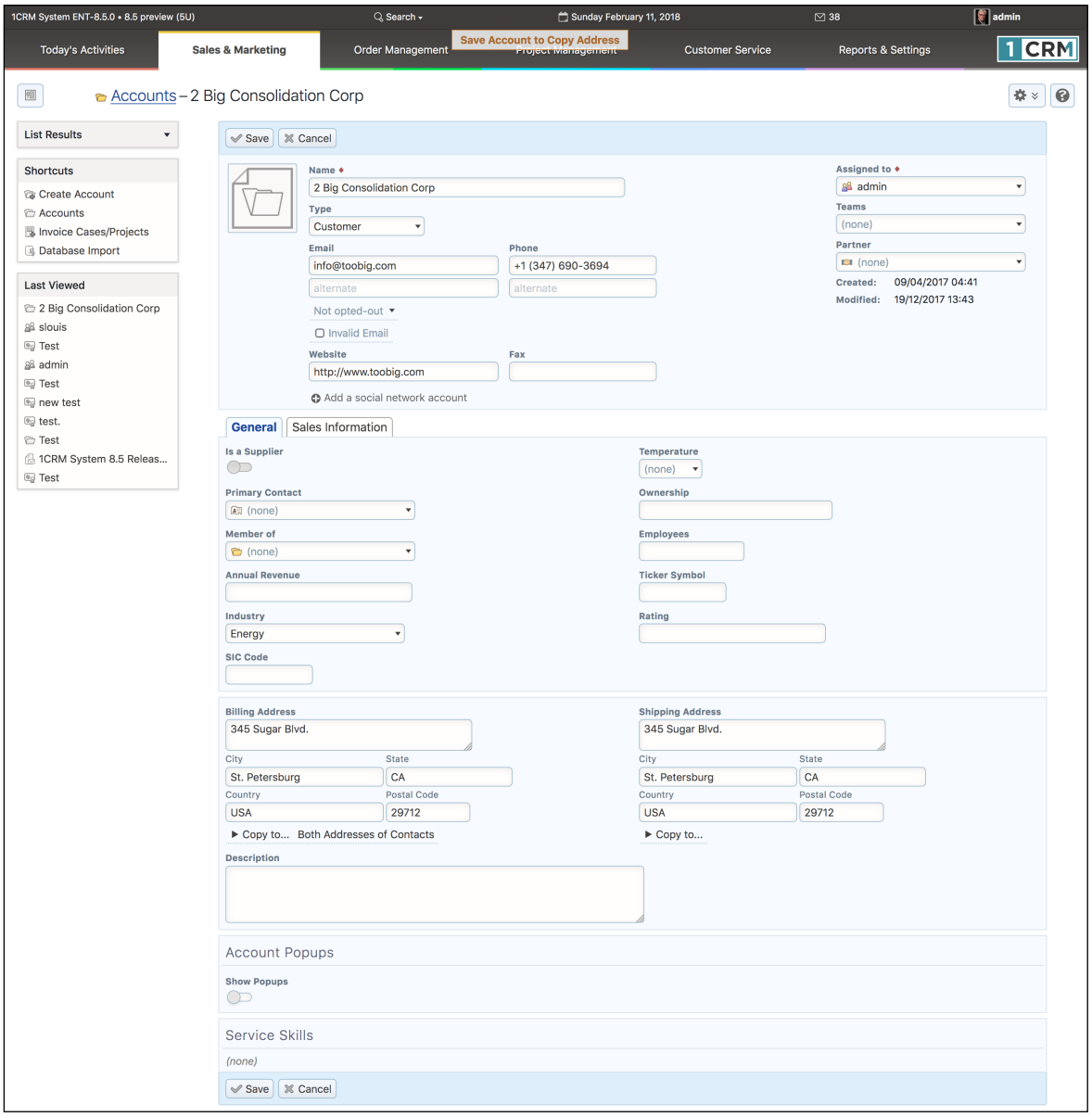


Figure 116: Copying Account Address to Related Contacts

5.1.6 Creating a New Account

To Create a new Account record, first click on the *Create Account* shortcut. You will see the Account Detail screen, similar to the one shown in Figure 20. You enter the Account name, normal contact information such as phone and fax numbers plus *Website* URL, and corporate information such as *Ticker Symbol*, *Annual Revenue*, number of *Employees*, *SIC code*, and *Ownership*. Your new Account may be assigned a Type of *Analyst, Competitor, Customer, Investor, Partner, Press, Prospect* or *Other*. It may also be assigned an *Industry* classification from a broad range of choices.

If an Account is a supplier, the *Is a Supplier* check-box should be checked. Enabling this check-box will cause an additional panel of Purchasing Information to be added to the Account detail view.

If the Account was introduced to you via one of your sales Partners, then you need to select the *Partner Name* from a popup selection box.

The *Sales Information* panel (and in some cases, the main panel for the Account) contains several values of special significance:

- *Balance Receivable* - This is a display-only field that is calculated by adding up the balance due on all invoices for this Account, less any Credit Notes.
- *Sales Credit Limit* - This value may be used to record an Account's credit limit. A warning message may be displayed when creating a new Quote or Invoice for an Account whose Balance Receivable exceeds their Credit Limit.
- *Default Sales Terms* - Used to set the default Terms for any new Quote or Invoice created for this Account.
- *Default Sales Discount* - Used to set the default Discount for any new Quote or Invoice created for this Account.
- *Tax Code* - Used to set the default Tax Code for all line items added to a Quote or Invoice for this Account. If set, this value overrides the Tax Code set on each Product within the Catalog, unless the item is marked *Tax Exempt* in the Catalog.
- *Sales Shipping Provider* - Used to set the default Shipping Provider for any new Quote or Invoice created for this Account.
- *Tax Information* - This information will be added to any Quote or Invoice PDF generated for this Account. Typically it will contain a national tax number, or business number, depending on the country where the Account is based.
- *Currency* - Used to set the default Currency for any new Quote or Invoice for this Account.

5.1.7 Account Popup Messages

Enabling the *Account Popups* checkbox on the Account will cause an additional panel to be added to the Account detail view. This panel enables the display and editing of three pop-up messages - for the *Account* in general, plus for *Sales* and *Service*. They may be used to set popup notes for an Account to alert employees in contact with the Account to special circumstances - such as Credit Hold, Large Sale Pending, etc..

- When the checkbox is set, and there is an *Account* popup message, then that message is displayed when the Account detail view is brought up.
- When the checkbox is set, and there is a *Service* popup message defined, the *Service* message is displayed when the Account is selected on a Case, or when a Case detail view is brought up that already has the Account selected.
- When the checkbox is set, and there is a *Sales* popup message defined, the *Sales* message is brought up when the Account is selected on a Quote or Invoice, or when an Invoice or Quote detail view is brought up that already has the Account selected.

5.1.8 Display Multiple Accounts on a Map

On the Accounts list view if you click on the Actions button, you see an option to *Display on Map*. If you select a number of Accounts, then perform the *Display on Map* function, you will see all selected accounts displayed on a shared map.

You can:

- Hover over any map point to see the Account name;
- Click on any map point to see additional details;
- Click on the ⛶ control to expand the map to full screen size;
- Click on the − control to zoom out;
- Click on the + control to zoom in;

- Click and drag to move the map in any direction within the window.

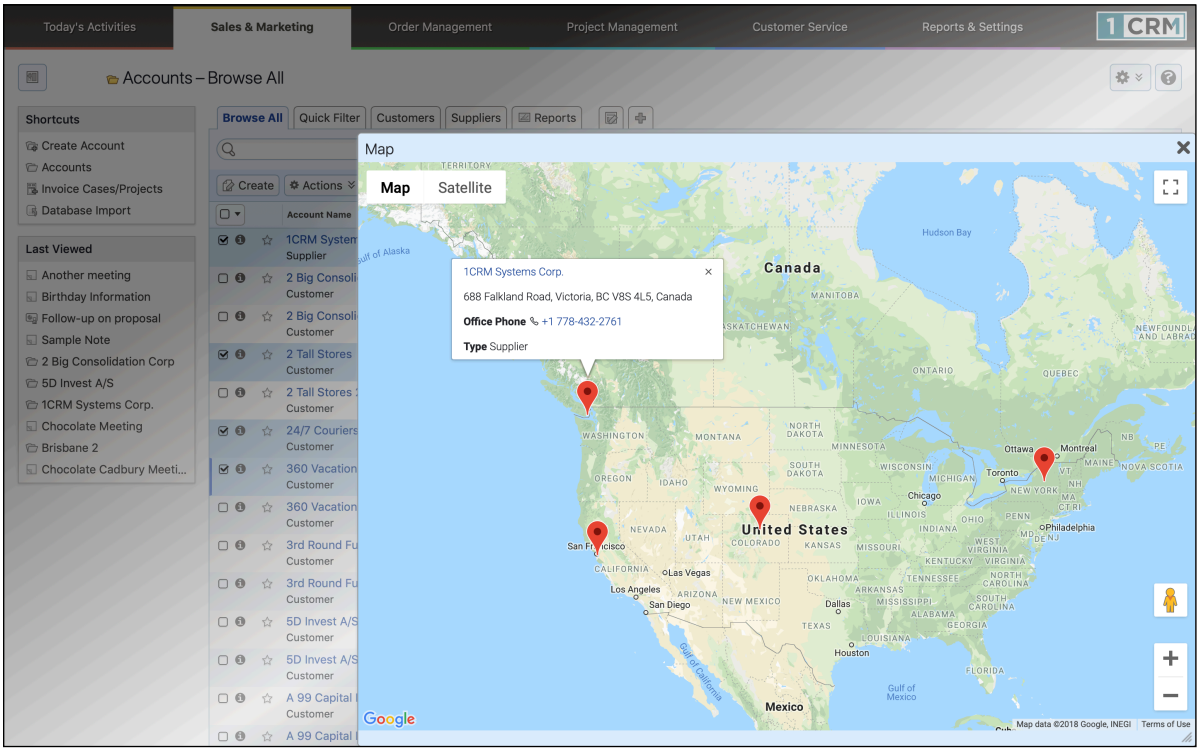


Figure 117: Display Accounts on a Map

Note: Your system administrator can control what information is shown when viewing additional details such as for 1CRM Systems Corp. above.

This same *Display on Map* action is available on the Leads and Contacts list views as well. It can be very useful when used in conjunction with a smart list tab which selects a specific set of Accounts, Leads or Contacts, to then visualize them all on one common map view.

5.2 The Contacts Module

Figure 118 shows the 1CRM screen with the Contacts Module selected:

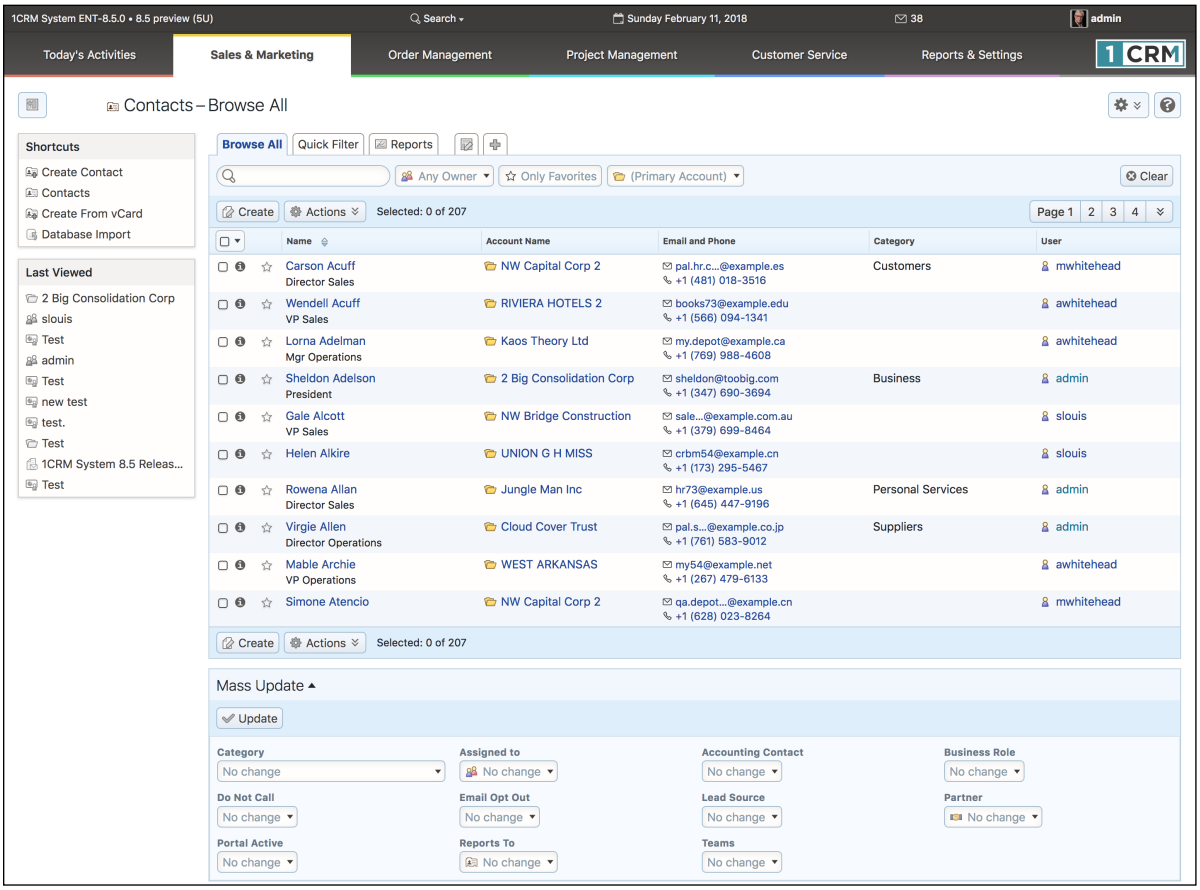


Figure 118: The Contacts Module (List View)

A Contact is an individual with some relationship to your organization (usually a customer), and likely with one of your Accounts.

The Contacts module has a Help icon on the title bar at the top of the main screen body, followed by a choice of layout tabs, and a list of all or selected Contacts. The Contact list may be sorted by clicking on any column title that has the icon beside it. Clicking on a column title when it is already the highlighted sort column reverses the sort order.

The Contact list is paginated if it contains more items than may be listed on the display, and controls are provided to go to the start or end of the list, or step to the next or previous page. Clicking on any Contact in the list displays the detail information for that Contact.

Navigation shortcuts are provided to create a new Contact by typing it in (*Create Contact*) or by importing the information from a vCard (*Create from vCard*). A special *Enter Business Card* option let's you create a Contact plus an associated Account, Opportunity and Appointment.

Administrators may also import bulk Contact data from Salesforce.com, Outlook, SugarCRM, ACT!, etc… using the *Database Import* shortcut.

The Contact list view provides handy linking capabilities to related information. Clicking on the Contact Name takes you to a detailed view of that Contact, and the Account Name links to the detailed Account view.

A particularly useful feature of the Contacts module is that each Contact may be set to belong to one or more Categories (it has a multi-select ability). So, once your Category options have been defined in the Studio, each Contact may be marked as to which Categories they belong to, and the list view may be filtered to show only Contacts that belong to one or more categories.

5.2.1 Live Business Cards

The top section of the Contact detail view screen (and the same is true for Leads as well) is designed to resemble a traditional business card. See the image below. This section of the Contact or Lead detail view screen is known as the *Live Business Card*™. The image below shows the many convenient actions grouped together in the compact area of the Live Business Card.

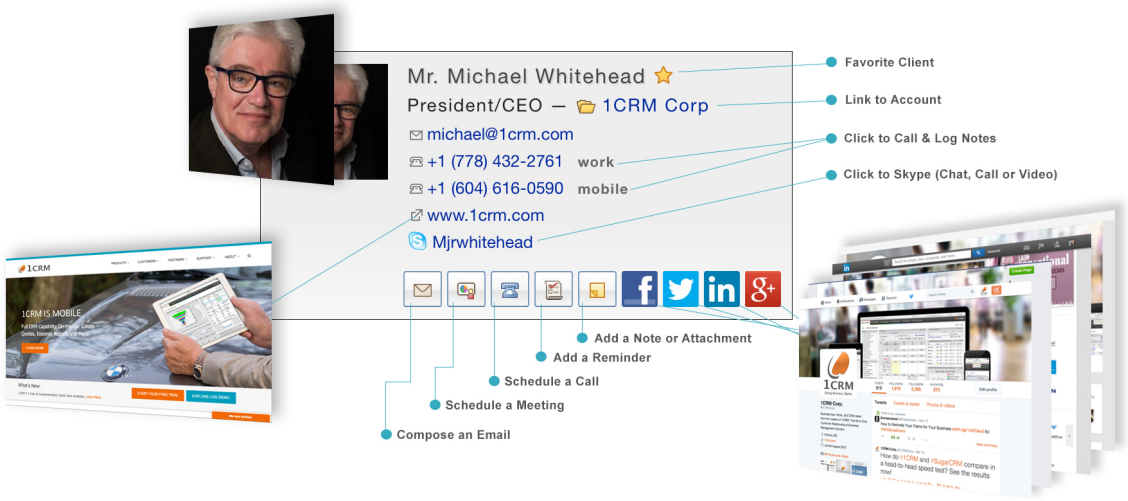


Figure 119: Live Business Card (Contacts Detail View)

5.2.2 Google Maps Integration

You will see an icon (resembling a stick-pin in a folded map) to the right of every address displayed in the Contacts module detail views. If you click the icon a Google Maps display will come up on top of the 1CRM display. The Google Maps display is initially set to the address from 1CRM, and is fully navigable.

Note: Your administrator needs to use the System Settings page in Administration to configure this feature before it will work.

5.2.3 Category Mass Update

In the Contacts and Leads modules you can Mass Update records with Category information. Since a Lead or Contact may belong to more than one of the set of Categories defined in your system, Mass Update allows you to assign multiple selections from the Category field. To perform this sort of Mass Update to a number of Contacts or Leads, simply:

- Select the Contact or Lead records you wish to update
- Choose the Category value(s) you wish to assign to the records selected, and click on *Update*.

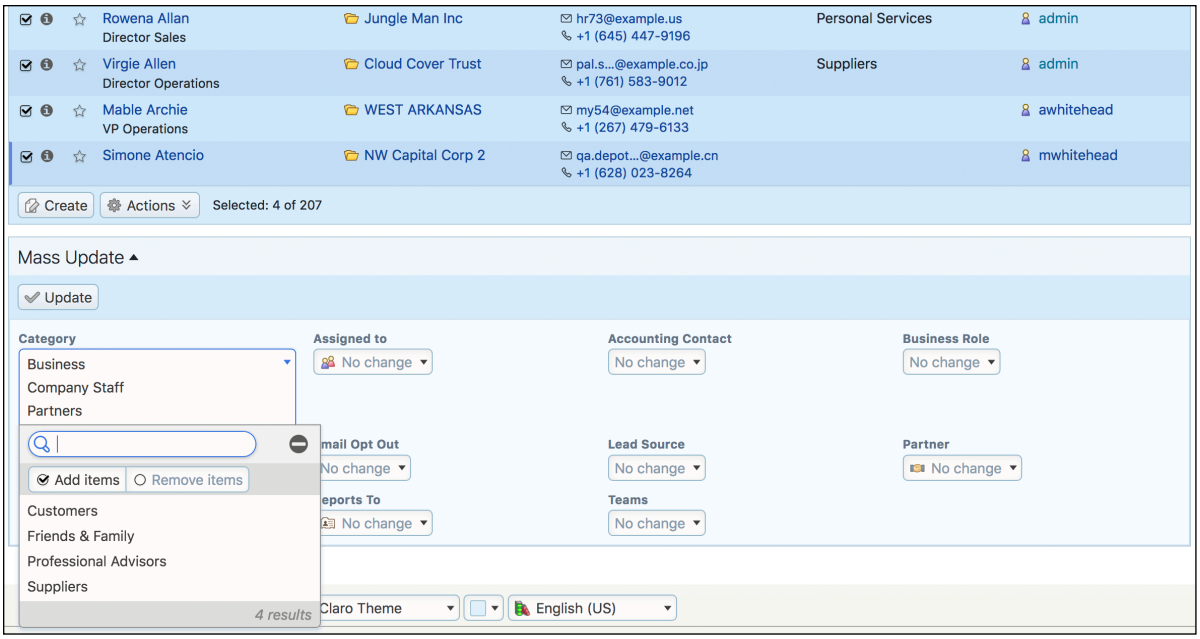


Figure 120: Category Mass-Update on Contacts List View

5.2.4 Email Contacts: Ad Hoc Bulk Email

You may use the filtered list of Contacts (filtered by Categories as above, or whatever you like) in the list view to perform an ad hoc bulk emailing. If you have the Contacts displayed that you want to email (no more than 200 may be selected), just choose the *Email Contacts* option from the Actions button and the Compose Email form will come up, with the email address of all these Contacts added into the BCC line. Now simply select an email template or compose the text of your email, add a TO name (likely yourself), and click on *Send*.

Note: Only one email is sent, not one to each Contact – so do not use a template with personalization fields inserted into it, such as *$contact_first_name*, as they will not be personalised to each recipient.

5.2.5 Quick Email Campaigns

The Quick Campaign feature in the Contacts and Leads Mass Update panels allows users to send personalized emails very quickly to many selected Contacts or Leads at once. Quick Campaigns use the standard 1CRM Campaigns functionality but without the need for the user to go manually through all the individual steps to establish a Campaign or Target List.

Quick Campaigns queues all outbound email messages it creates for immediate sending in the 1CRM outbound mail queue, and relies on the scheduler task *Send Campaign Emails* to send those emails, just as standard Campaigns do. Quick Campaign responses, views, opt-outs and bounces are tracked and recorded in the same way as with standard Campaigns.

Note: Quick Campaign messages (just like standard Campaign messages) are different from emails sent with the *Email Leads* and *Email Contacts* (see section above) buttons in that:

- *Email Leads / Contacts* does not record the sending of the message in each recipient's message history
- *Email Leads / Contacts* does not support standard variables or user variables in templates
- *Email Leads / Contacts* email messages are not individually addressed to each recipient but to a bcc recipient group

Before You Use a Quick Campaign

First, prepare an email template. It may contain standard email template insertion variables, such as $contact_first_name, to personalize the message with the recipients' specific details, for example:

> *Dear $contact_first_name, ...*

It may also include variables to personalize the message with the name, title and signature of the 1CRM user sending the Quick Campaign:

> *Thank you for your interest in our products. My name is [SENDER_FIRSTNAME] [SENDER_LASTNAME], and I am a [SENDER_TITLE] for our company.*
>
> *Best regards,*
>
> *[SIGNATURE]*

Note: Email templates may be prepared to reflect different stages of the Lead qualification process, such as *Welcome to new web site visitor*, *Follow-up message*, *Recycled lead message* etc.. and therefore can be easily re-used for other Leads or Contacts at a later date. Sales users can then simply filter Leads or Contacts by status in the List View, select all records, and send a Quick Campaign from the Mass Update panel, while updating the status field information at the same time.

Next, make sure you have at least one group mailbox setup with *Possible Actions* set to *Bounce Handling*, and with the mailbox *Active* box checked. To setup an appropriate mailbox go to *Admin – Group Inboxes*.

Note: You may wish to set the mailbox's *Deliver to Folder* to *Campaign responses* to see campaign response emails separate from other inbound group email.

Sending Quick Campaign Emails

In the Leads or Contacts List View screen, select your desired recipients, to a maximum of 200.

Choose the *Quick Campaign* option from the Actions button, as shown below.

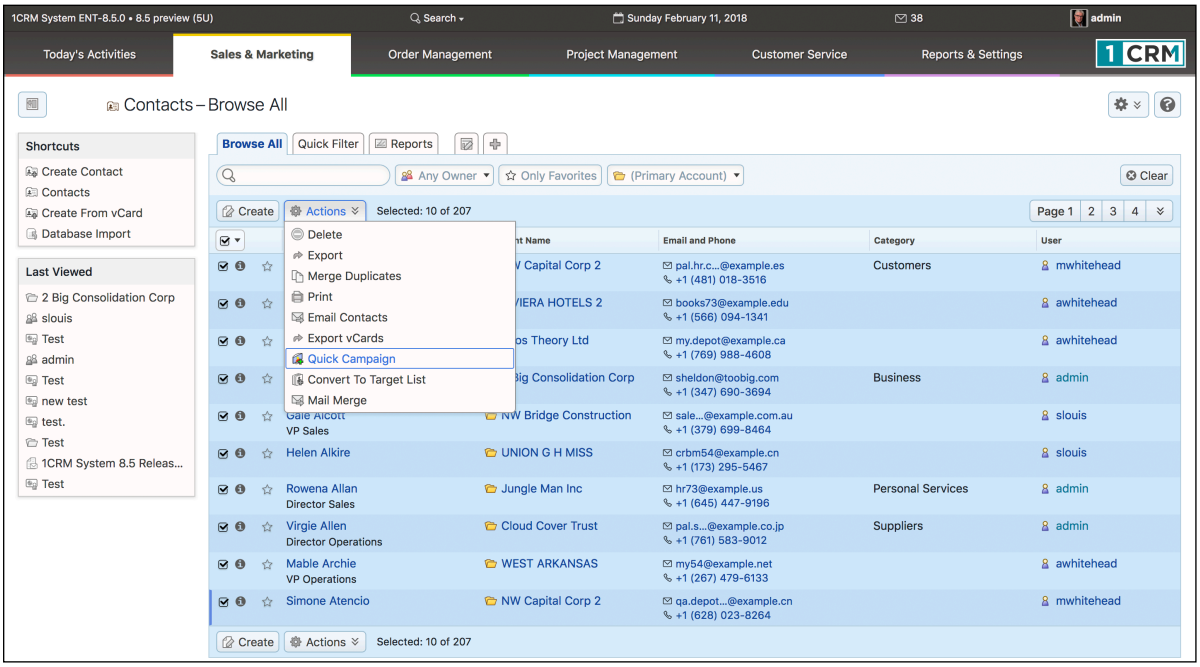


Figure 121: Beginning a Quick Campaign

This causes a popup to appear as shown in Figure 122. Now select the Campaign Email Template. Then select a Campaign Mailbox; the selection only shows group mailboxes that are properly setup for bounce handling (see above prerequisites). Finally, click the *Run Campaign* button to initiate the Campaign.

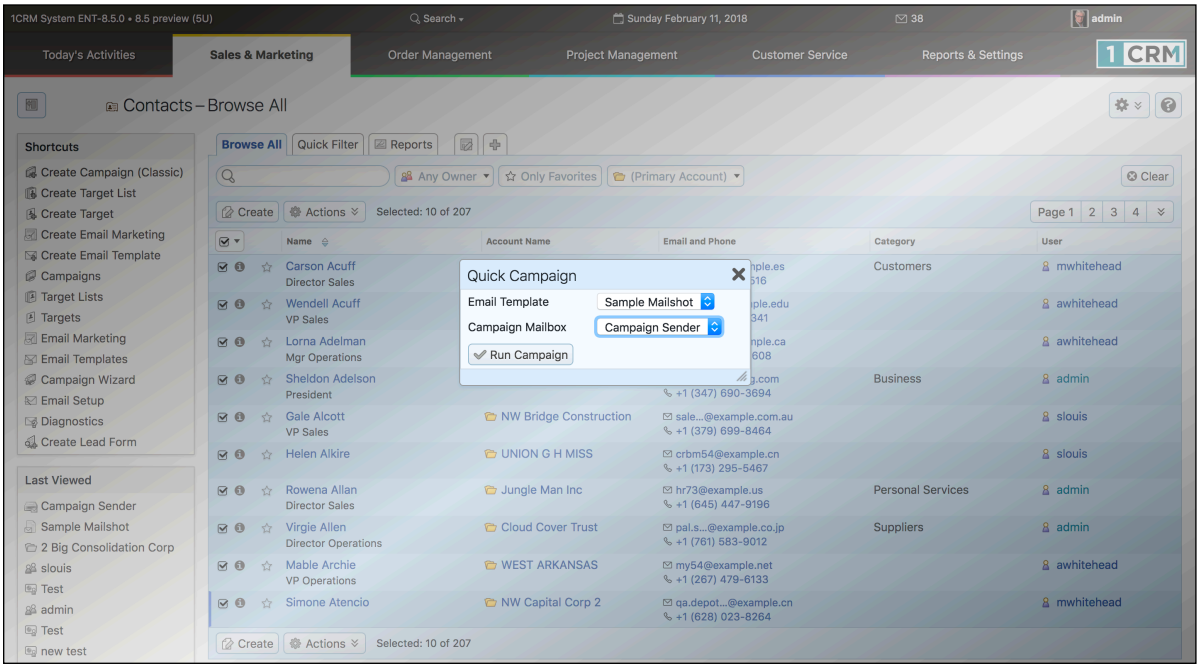


Figure 122: Sending Quick Campaign Emails

Upon successful completion, the newly created Campaign opens to show all the outbound messages it has created in the outbound email queue.

Note: In preview, any variable used in the template will show with its placeholder text, not with actual Lead or Contact data substituted.

Note: All Quick Campaign email messages will be populated with the *From name* of the current 1CRM user, however the *From address* will be inherited from the selected Campaign mailbox's *From address*. Therefore emails may appear to be from *"Jane Doe"* <sales@company.com>.

Once the periodic scheduler task *Send Campaign Emails* has run, all messages will show on the campaign record in the *Sent/Attempted* panel, and all responses, opt-outs and bounces will be recorded subsequently. If you don't want to wait for the scheduler task to run, you can force the Quick Campaign to be sent immediately by going to *Admin – Scheduler* and executing the task manually. Either way, the Quick Campaign messages will be added to each recipient's email history, as well as to each recipient's campaign log, and can easily be recognized by their subject / title prefix of ***.

Note: To later review or re-use the list of recipients of any Quick Campaign go to *Campaigns – Target lists* to find the Target list that was automatically created from all selected recipients. These Target lists may be re-used for standard Campaigns or to manually add Targets to your newsletter subscriptions.

5.2.6 Mail Merge Using RTF Template

Another handy use for a filtered list of Contacts is to perform a Mail Merge function with them. Simply filter the Contacts list view as desired, select the Contacts you want, and choose the *Mail Merge* option from the Actions button. You can then browse for a Mail Merge template file (it must have

the RTF file type, short for Rich Text Format), and once you have selected it just click on the *Run Merge* button. After 1CRM finishes the processing, you receive a new download file to your browser. Now just save this file, load it into your favourite RTF-capable word processor such as Microsoft Word, and print it. The merged document will contain x copies of the original document, where x is the number of Contacts originally selected.

Mail merge templates may contain insertion markers for personalization fields, such as the name or address of each Contact you wish to mail (***Note:*** this also works for Leads as well). These templates are best created in Microsoft Word, and saved as an RTF filetype. They may contain logos, left and right justified text, multiple fonts, bullets, italic and bold text, to enable the creation of very attractive printed documents. Each Mail Merge template also needs special tags to mark the Start and End of the insertion part of the document. You can see a sample of an RTF template by downloading this file: http://www.1crm.com/dl/Sample Mail Merge Document.rtf.

For a presentation on the use of the Mail Merge function, see this video.

5.2.7 Export vCards

You may use the Contacts list view to export a group of vCards for a set of selected Contacts.

- Select the Contact records you wish to export as vCards
- Choose the *Export vCards* option from the

button
- A file called *ExportVCards.zip* will be downloaded from the browser, containing all the vCards

5.3 The Campaigns Module

Figure 123 shows the 1CRM screen with the Campaigns Module selected:

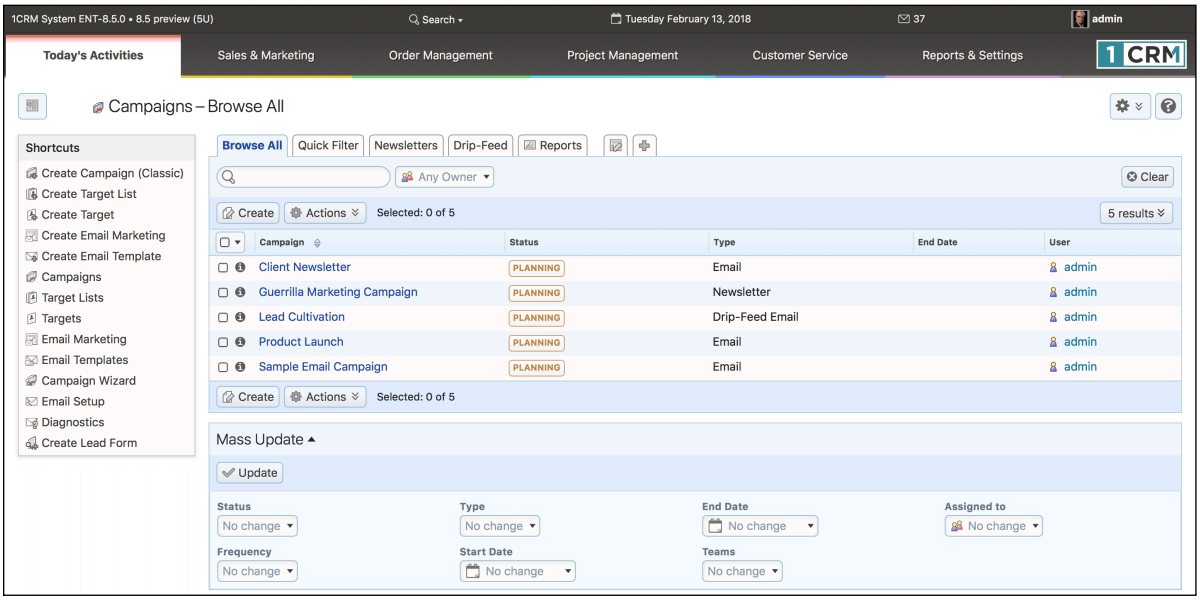


Figure 123: The Campaigns Module

You can create 1CRM Campaigns to track and manage your business' marketing campaigns and targets. Within 1CRM, the individuals you deal with may be represented as one of three types of data: Targets, Leads, or Contacts.

- Targets may well be people you do not know much about – as they may simply be names on a list you have purchased.
- Leads information should be a bit more solid – you should know the contact data is valid if not comprehensive, and that the person has at least some interest in one or more of your products or services.
- Contacts are the most mature form of data – all the contact data should be verified to be accurate, and the person should be an actual customer, or about to become one.

Note that when assembling a Target list for a Campaign, you may add together a mixture of Targets plus pre-existing Contacts and Leads – so (somewhat confusingly) a member of a Target list does not actually have to be a Target, but may be a Lead or a Contact, or even a User.

Campaigns may be created by using either the *Create Campaign (Classic)* shortcut, or the *Campaign Wizard* shortcut. We will explain both options by creating an Email Campaign using the *Create Campaign (Classic)* shortcut, and a Newsletter Campaign using the *Campaign Wizard* shortcut.

As well, there is a *Quick Campaign* feature available from the Actions button of the Contacts and Leads modules - which you may find simpler and easier to use for smaller once-only Campaigns.

5.3.1 Create Campaign (Classic): An Email Campaign

To create a marketing Campaign using the *Create Campaign (Classic)* option, click on that shortcut and fill in the basic details for the Campaign. The mandatory fields are: *Name*, *Status*, *Start Date*, *End Date* and *Type*. All the other fields are essentially documentation fields - fill them in if you feel

they will be useful to you. The Campaign Type field is a very important one. The Campaign Type may be *Email*, *Drip-Feed Email*, *Newsletter*, *Telesales*, *Mail*, *Print*, *Web*, *Radio* or *Television*. Of these choices, Email, Drip-Feed Email and Newsletter Campaigns are actually performed by 1CRM. The others may be documented within 1CRM by entering them here as a Campaign, but the only value of entering them in 1CRM is as documentation. For now, choose *Email*, to create an Email marketing campaign. When you are done, click on the *Save* button. You should see the Campaign detail view screen, which will resemble the figure below.

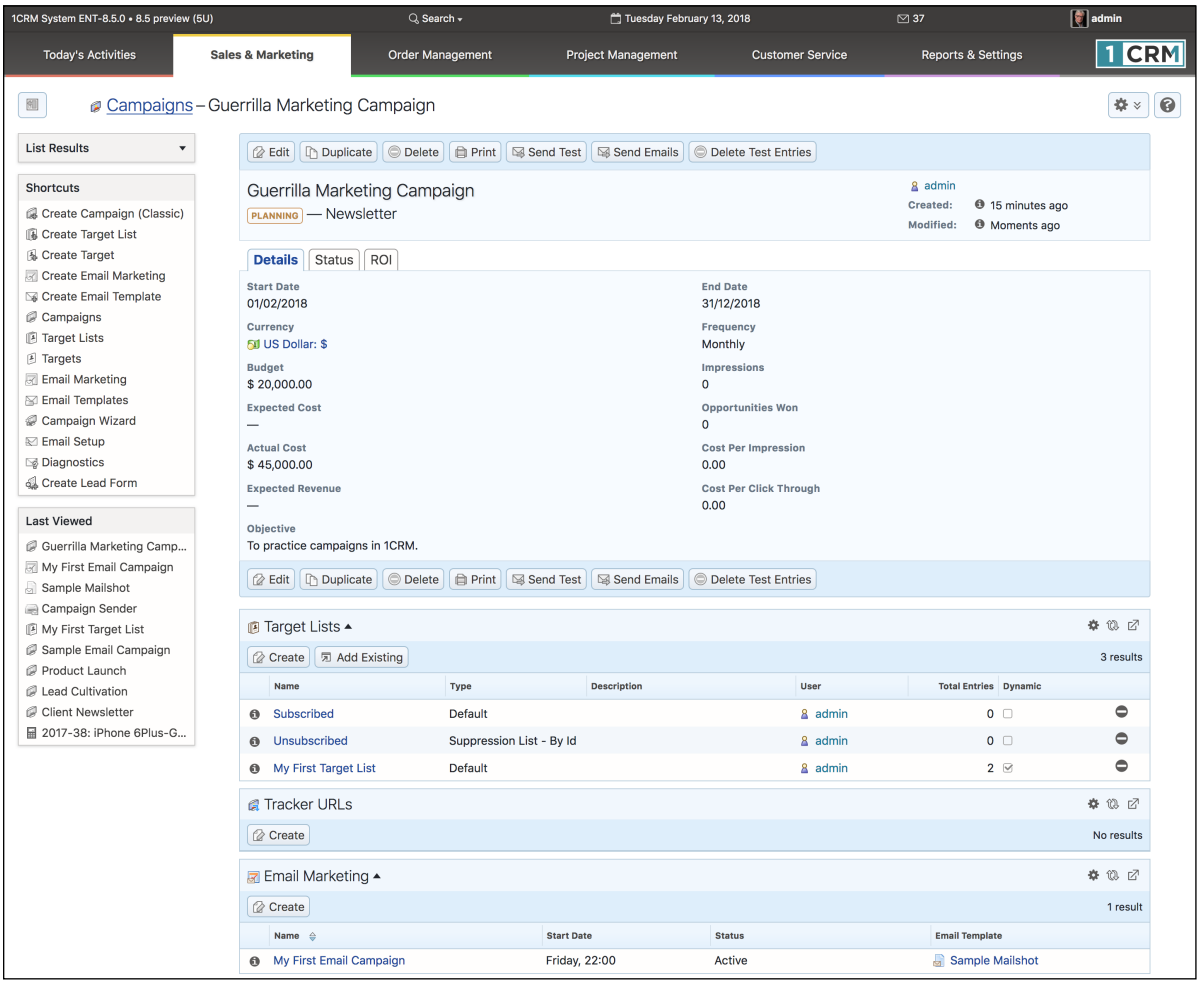


Figure 124: Campaign Detail View

As part of defining an email marketing Campaign, you will need to create an email marketing program within your campaign, and an Email Template.

Create an Email Marketing Program

Go back to the Campaign you just created. Click on the Create button in the Email Marketing sub-panel (see figure above), and fill in more details about your specific email marketing program within this overall Campaign, as per Figure 125 below.

One of the required fields on an email marketing program is *Use Mailbox*. This needs a Group Inbox that you create in Admin – Email – Group Inboxes – and be sure to create it with *Possible Actions* set to *Bounce Handling*. So actually, you will need to go to Admin and create that Group Inbox first, before you define your email marketing program. See Figure 126 for an illustration of that screen.

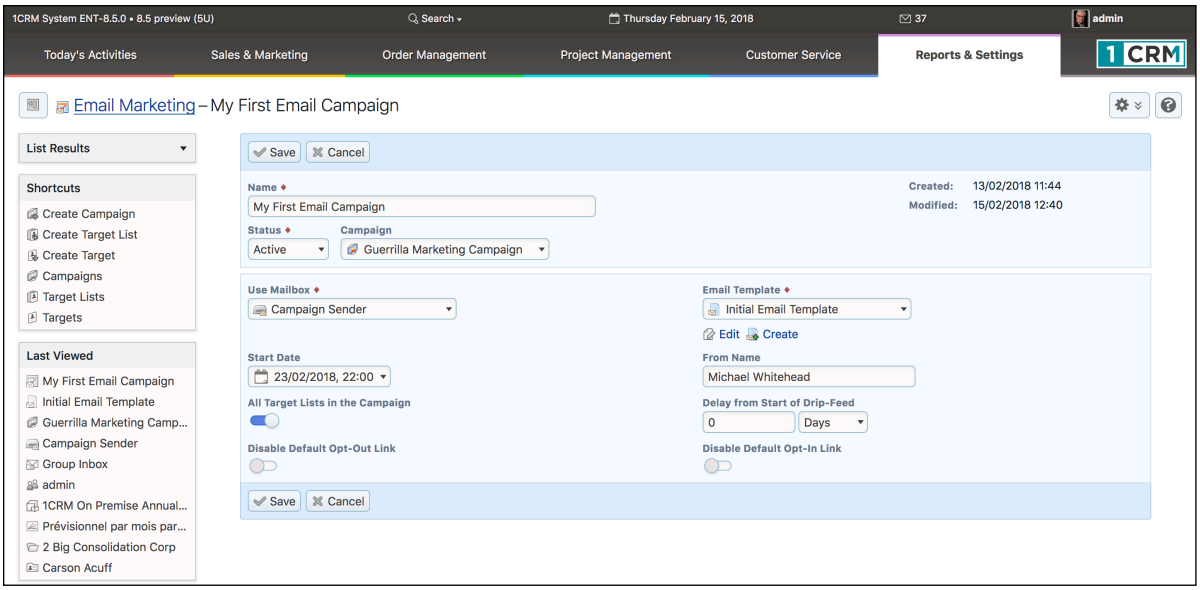


Figure 125: Creating an Email Marketing Program

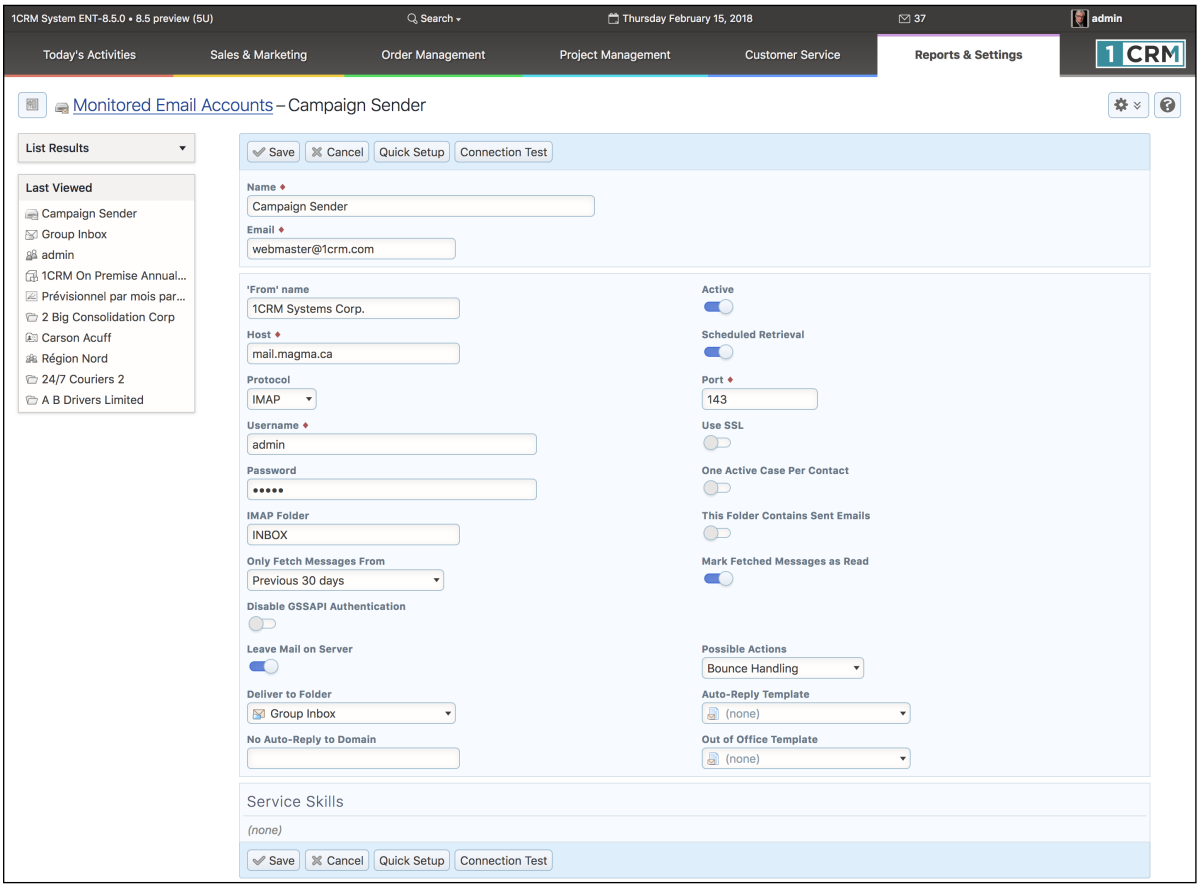


Figure 126: Creating a Group Inbox for Bounce Handling

Create an Email Template

To create an Email Template, go to the Emails module, and click on the *Create Email Template* shortcut, or just create one when you are creating the email marketing Campaign (there is a special link available to do this).

Once you are editing the Email Template (see Figure 127 below) set the *Name*, *Description* and *Subject*. Then edit the email body. To create a fancy marketing style Email Template as shown below, click on the little triangle (marked item 1 in Figure 127) to open up the toolbar shown in that figure. Then click on the *Source* link in the toolbar (item 2 in Figure 127) to view the email body window as HTML source code. Then you can paste HTML source from a program such as DreamWeaver into the email body, and then *Save*.

Note that you can create variable data insertion points in your email using the *Insert Variable* dropdown controls, and the *Insert* button. These data insertion points allow you to personalise mail-shot emails with the name of the recipient, or their company name, etc.. Also note that binary attachments or 1CRM Documents may be attached to the email.

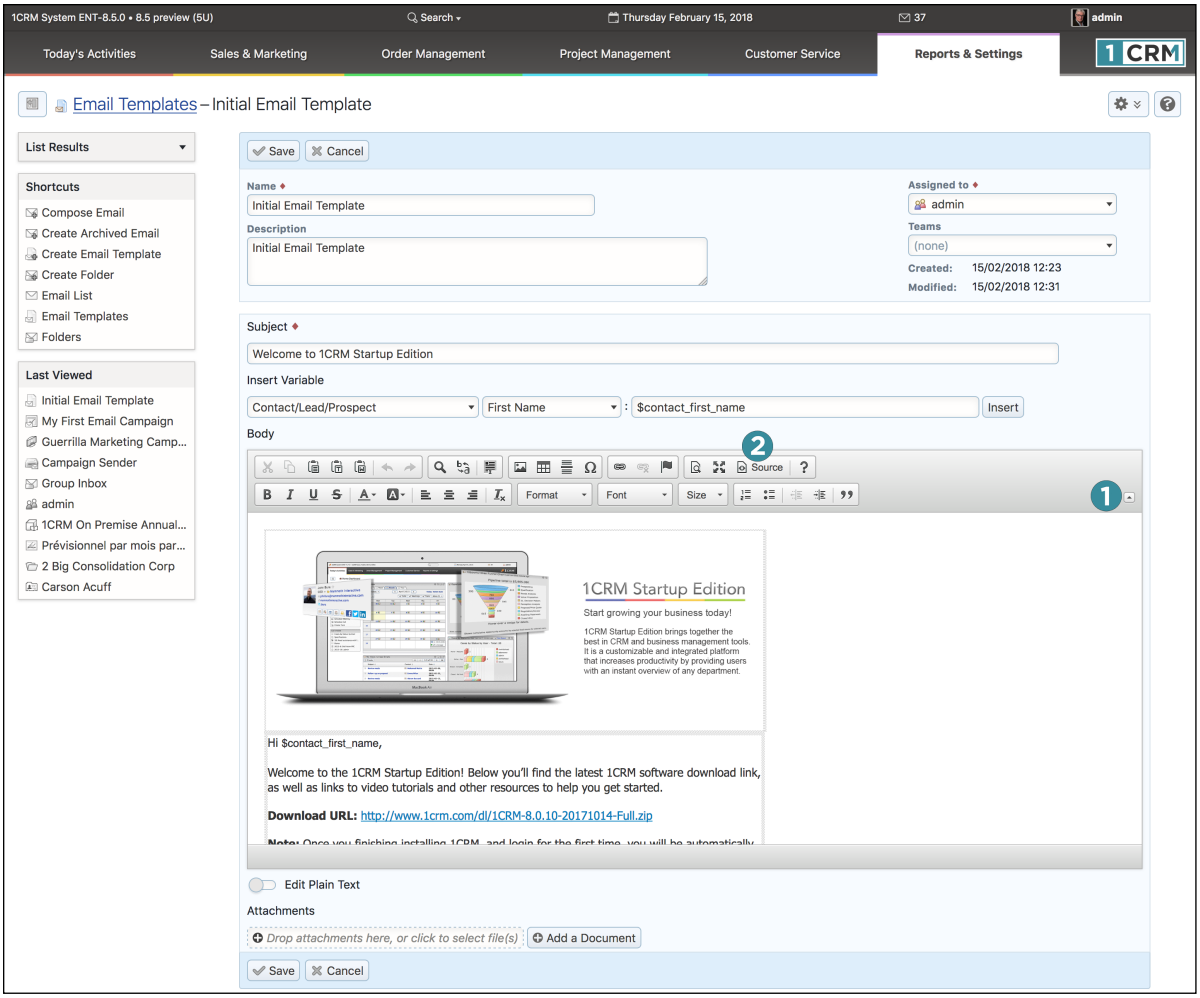


Figure 127: Creating an Email Template

Create a Target List and Link it to the Campaign

Next, you need to create a Target list to hold all the Targets you identify for this Campaign. Click on the *Create Target List* shortcut, and fill in the *Name*, *Type* (leave this at Default for now) and *Description* for the list, and save it.

Now you need to import (in either Comma Separated Values (CSV) or Tab Separated Values (TSV) formats), or type in, the data for some Targets – using the *Database Import* shortcut, or the *Create Target* shortcut. Once you have a number of Targets in the system, you need to select some of these Targets, as well as any Leads and Contacts (or Users) that you would like to include in the Campaign, and add all of these people to the Target list you created. You do that by opening the detail view of the Target list, and in turn, clicking on the *Add Existing* button for each of Targets, Contacts and Leads – and selecting whomever you wish from those lists.

Lastly go back to the detail record for your marketing Campaign, and in the Targets List sub-panel, click on the *Add Existing* button to select the list we just prepared. Note that you can add more than one Target list here – so if you have them separated out by geography or some other criterion, you can include several lists here to make up the full Campaign. Your Campaign should now show its related Target list, and email marketing program, just like Figure 124 above.

Note: You can also create or add to a Target list by using a report on Contacts or Leads. A button on the report detail view is used to perform this function. See section 9.1.3 for further details.

Different Types of Target Lists

When you create an email marketing Campaign, you should note that you may associate Target Lists of several different types with the Campaign:

- Default – these are the real live lists of people to whom you want to send your Campaign emails
- Test Lists – these are lists of people used to test the Campaign before it goes live
- Seed Lists – lists of people to be included in the Campaign, but not to be tracked as potential leads
- Test and Seed Lists are not included when the system calculates email tracking statistics
- Suppression Lists – At Campaign run time, suppress sending emails by User ID, by Email Address, or by Domain

To summarize, the basic workflow process for creating a Campaign is:

1. Create Campaign
2. Create Email Marketing program within your Campaign
3. Create an Email Template for the Campaign to use
4. Create a Target List
5. Create or Import Targets
6. Add Targets (and potentially Leads, Contacts and Users) to the Target List
7. Link Target List to the Campaign

Dynamic Target Lists

You may have noticed a *Dynamic* checkbox when defining a Target List. If you check this box on the Target List edit view, the secondary tab *Target Filters* becomes live, and you can define Filter rules for Targets, Leads, Contacts and Users to be automatically included into the target list.

This is a fantastically useful feature - as it means you do not continually have to maintain target lists, adding new leads and contacts into them. As long as your fundamental data is maintained in good order - be it the Country field for Leads and Contacts as in Figure 128 below, or any other specific item of information on your Leads, Targets or Contacts - your target list will automatically stay up to date.

Commonly, users will dedicate a field like Category, or a custom dropdown field, to tracking the stage of a Lead, in terms of what email campaigns it has received, or should be receiving. Combining that approach with Dynamic Target Lists, and Drip-Feed Email Campaigns, is the most powerful Marketing feature available in 1CRM. It also means that you can report on these Leads by their stage in the campaign process, and track conversion rates by the stage of the campaign process - extremely useful capabilities.

Drip-Feed Email Campaigns

Drip-Feed Email Campaigns are performed in a different manner to other email campaigns. Rather than explicitly clicking on the *Send Emails* button (see Section 5.3.4) you simply define the target list (almost always a Dynamic Target List) and the multiple entries on the Email Marketing sub-panel - each with its own different *Drip-Feed Delay* setting - and the emails themselves are sent by the action of a Scheduler Task called *Schedule Drip-Feed Campaign Emails*. The whole series of emails for each target is added to the Email Queue at the same time - simply with different dates on which they are to be sent. Hence it is the Email Queue which Drip-Feeds the emails to each intended target. Like all campaign emails, once sent they will be shown on the Campaigns sub-panel for each Contact, Lead and Target involved.

Note: You should make sure the Drip-Feed Scheduler Task is active, and scheduled to run once each day.

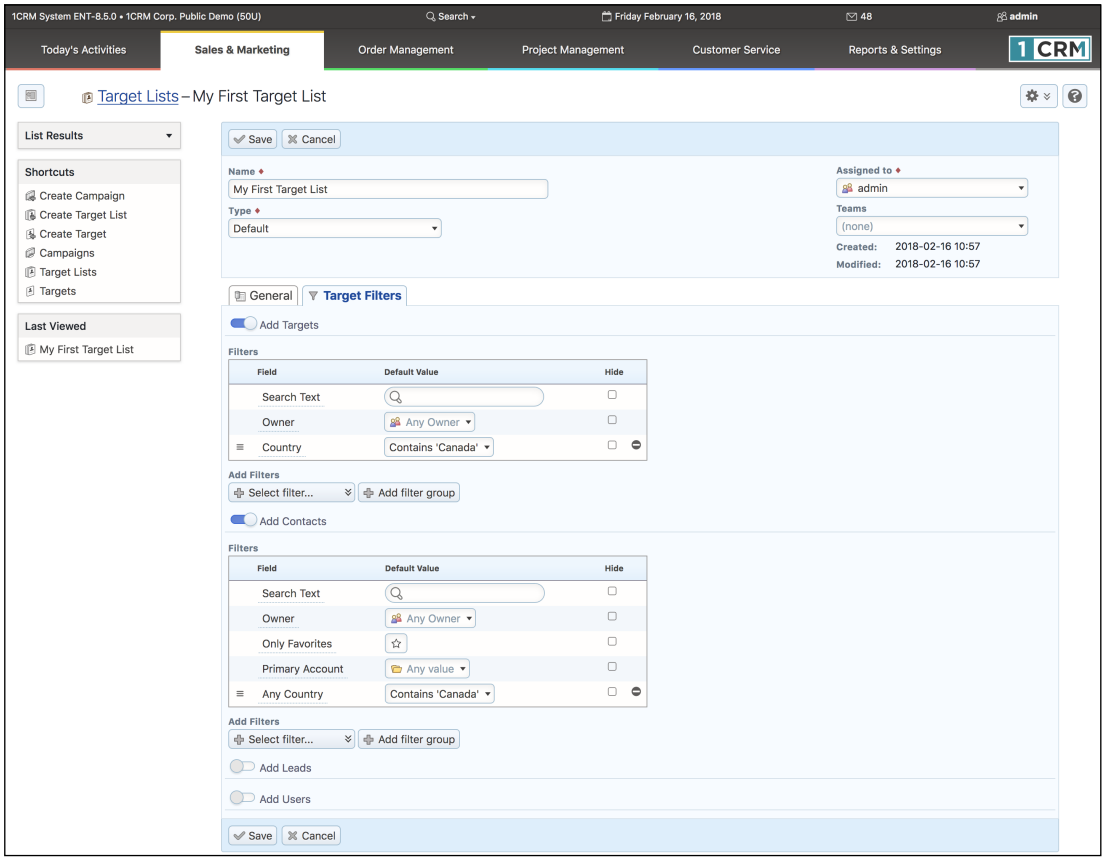


Figure 128: Defining a Dynamic Target List

5.3.2 Campaign Wizard: A Newsletter Campaign

Now we will go through the creation of a Newsletter type Campaign, using the *Campaign Wizard* shortcut to illustrate the use of that option. Click on that shortcut, and you will see this screen:

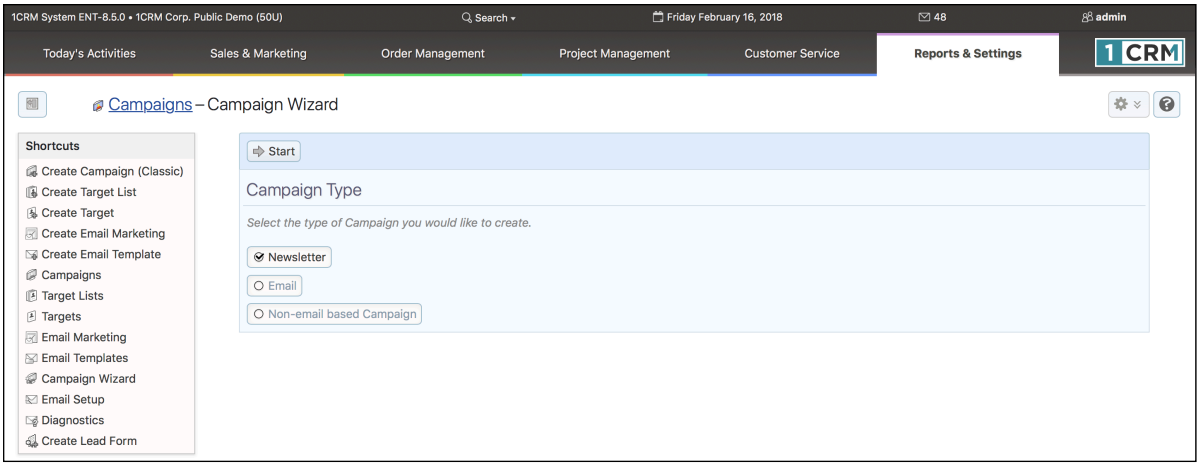


Figure 129: The Campaign Wizard - Campaign Type

Select the *Newsletter* option and then click on *Start*. You will see the screen shown in Figure 130 below. If you have yet to configure your email setup, you will also see a warning message reminding you to do so. (Do this in *Administration - Email and Notification Settings*.)

Now enter a *Name* for your newsletter, and also enter at least the *Status*, *End Date*, and *Frequency* of the newsletter, as desired. Then click on *Next* to proceed to the screen shown in Figure 131.

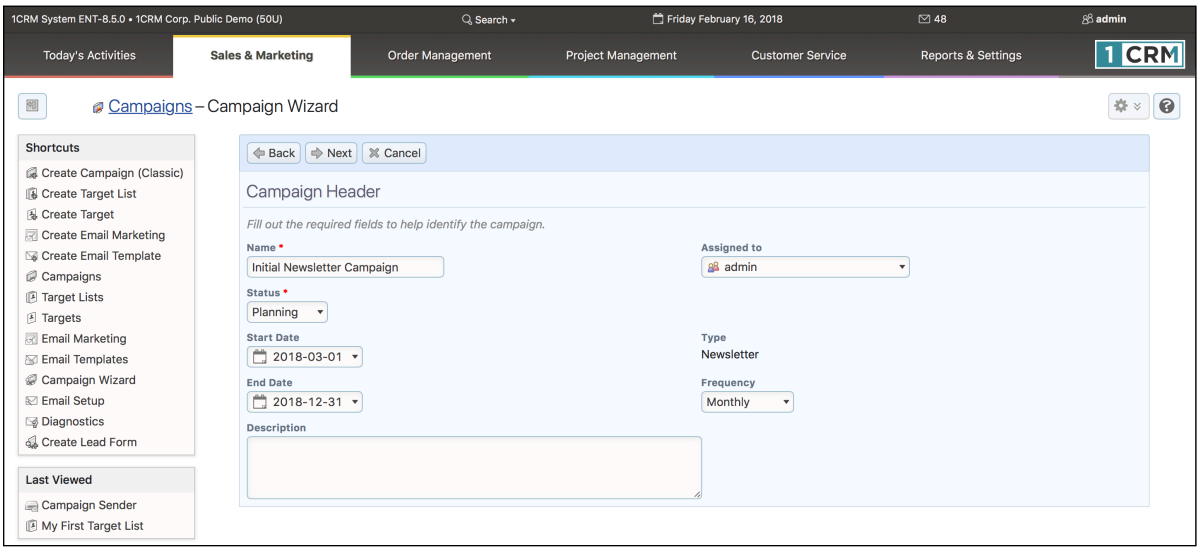


Figure 130: The Campaign Wizard - Campaign Header

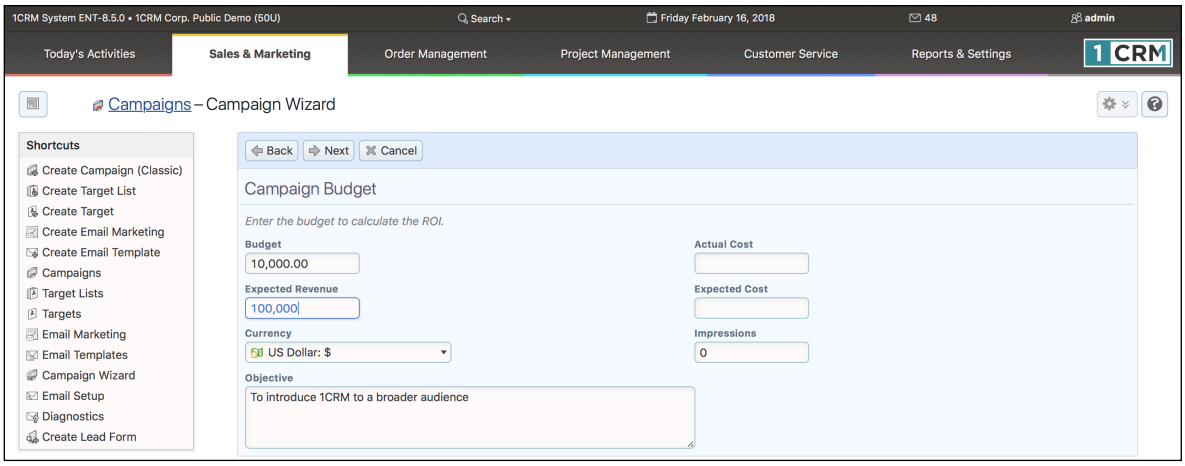


Figure 131: The Campaign Wizard - Setting the Budget

Set the budget details for your newsletter as appropriate (see the figure above) and click on *Next*.

Tracker URLs

The next screen (see Figure 132 below) allows you to set any Tracker URLs you may need for your Campaign. The idea of Tracker URLs is a little bit more complex than the rest of creating an email Campaign, so let's look at it in some detail.

If you look at the figure below, you can see that two Tracker URLs have been defined, and a third is about to be added by clicking on the *Create Tracker* button. A Tracker URL is a link - either a URL or a PHP program on your 1CRM server - to a place you want the recipient of the email to go when they click on a link in your email.

For example, here at 1CRM Systems Corp., we might well send out an email that had a link to request a *Free Trial* of 1CRM, another link to try out our *Public Demo Site*, and lastly, a link to ask to *Opt Out* of the Newsletter Campaign. To do this, we would create an Email Template with all the fancy HTML we might want, plus the text that dealt with these three actions the recipient of the email might wish to take. Then we would create the Newsletter Campaign that used this Email Template, and in creating the Campaign, define three Tracker URLs - one for each of the three actions. And indeed, those are the three URLs defined in Figure 132. Then we would go back to the Email Template, and add Tracker URL references to the text dealing with each of the three actions, which would link them each to the appropriate Tracker URL.

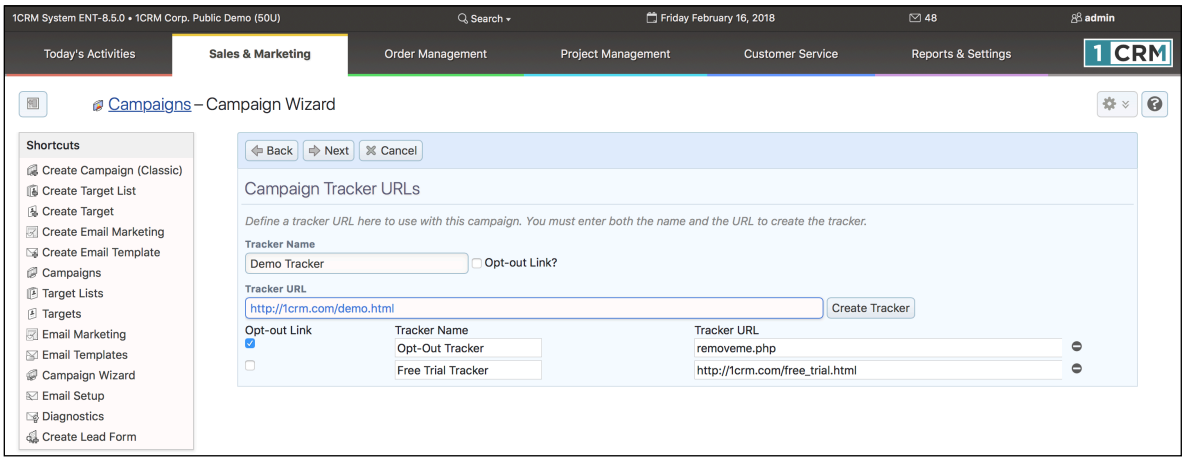


Figure 132: The Campaign Wizard - Tracker URLs

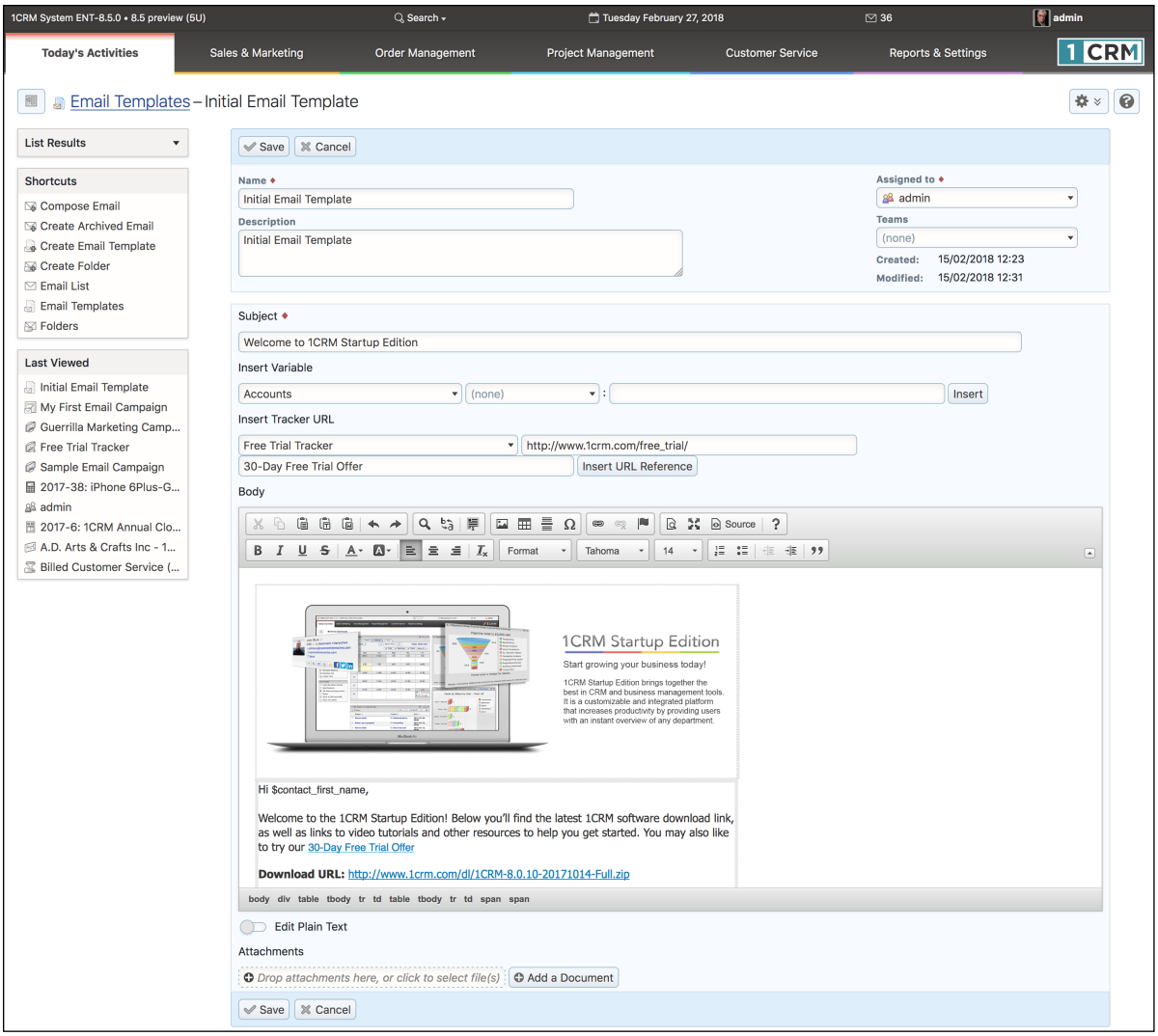


Figure 133: Inserting Tracker URLs in Email Template

In Figure 133 above you can see that a link has been added after text discussing the online demo. This link was added by selecting a *Free Trial Tracker* on the Tracker dropdown list, and then clicking on the *Insert URL Reference* button. The text to be added with the Tracker URL may be edited, and was set to *30-Day Free Trial Offer* for that URL.

When a client receives this email, and clicks on that link, they will be taken to the link associated with that Tracker URL - but most importantly, ***1CRM will first collect statistical information about the fact that the client has clicked on that link*.**

Note: The *Insert URL Reference* function is only shown on the Email Template edit view when you go there by linking from a Newsletter or Email marketing campaign screen.

At this point we have set the Campaign header, the budget info, and created any Tracker URLs we may need. Now we proceed to the Subscriptions step of the Campaign Wizard, by clicking on the *Next* button, and we see the screen below:

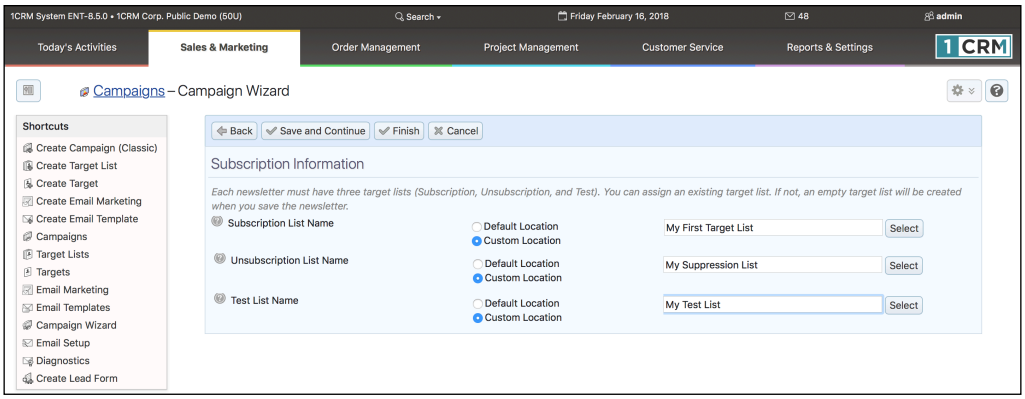


Figure 134: The Campaign Wizard - Subscription Information

On this screen we assign three existing Target Lists to the Newsletter Campaign - or create three new ones. For each new one, select the *Auto-Create* radio button. For each existing Target List, choose the *Allow Select* radio button, and then choose the Target List using the *Select* button. The *Subscription* list is for customers who are to receive the newsletter. The *Unsubscription* list is for those customers that have opted out of this newsletter Campaign. And the *Test* list is for Targets you will use for testing the newsletter Campaign.

Now click on the *Finish* button to save your Campaign, and see a summary as in the figure below by clicking on your campaign in the list view:

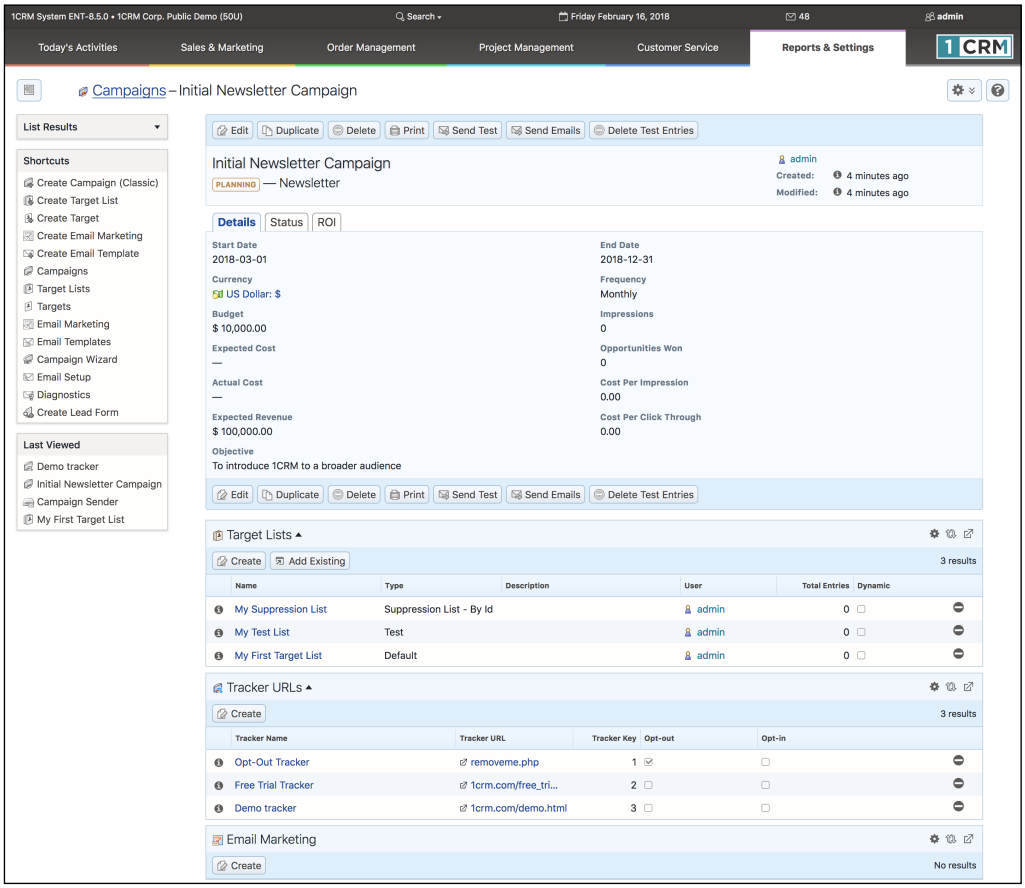


Figure 135: The Campaign Wizard - Newsletter Campaign Summary

5.3.3 Testing Your Campaign

Once you have your Campaign and its related information created, you should run Campaign Diagnostics to check your setup. Click on the *Diagnostics* shortcut, and you will see a screen much like the one in Figure 136.

This function lets you check that you have setup your Campaign properly, and also that your administrator has setup the various scheduler tasks needed at the system level to support the execution of a Marketing Campaign (*Send Campaign Emails*, *Process Bounced Campaign Emails*, *Schedule Drip-Feed Campaign Emails*).

Next you need to test your Campaign by clicking on the *Send Test* button at the top of the Campaign Detail view. Make sure that you have created a testing Target list, and that you are sending the test Campaign to that list.

Note: In test mode, a Campaign will ignore suppression lists, and also will not check for duplicated email addresses, allowing you to send multiple emails to the same recipient.

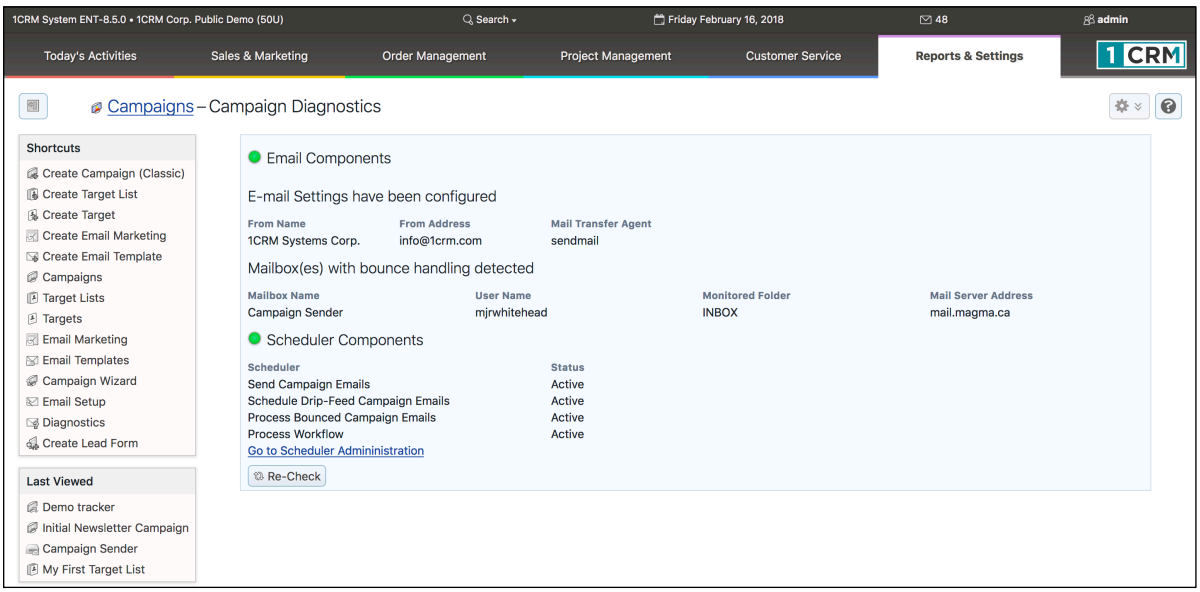


Figure 136: Campaign Diagnostics

5.3.4 Running Your Campaign and Tracking Results

Once you have created your Email or Newsletter Campaign (using the *Classic* or *Wizard* method), and its associated Email Marketing Programs, Email Templates, Target Lists and Tracker URLs, and tested that the Campaign seems to be working in test mode, it is time to run your first real Campaign.

Running Your Campaign

Once again, before you run your production Marketing Campaign, make very sure that your Email Template, and your Target Lists are all in good order - there is nothing worse than embarrassing your company by sending out an incorrect email, or sending it to people that have asked not to receive it.

You also need to be careful about the *Start Date & Time* you set on an Email Campaign, to make sure it is set for when you want the Campaign to go out. The *Start Date & Time* on an Email Marketing program is the key time and date used by the system to initiate the Campaign. As well, you need to make sure that the Scheduler is set up properly if you are going to send out the Campaign automatically, rather than manually. (*Diagnostics* checks that for you.)

To send out your production Campaign emails, click on the *Send Emails* button at the top of your Campaign detail view. You will see a screen like the Figure below:

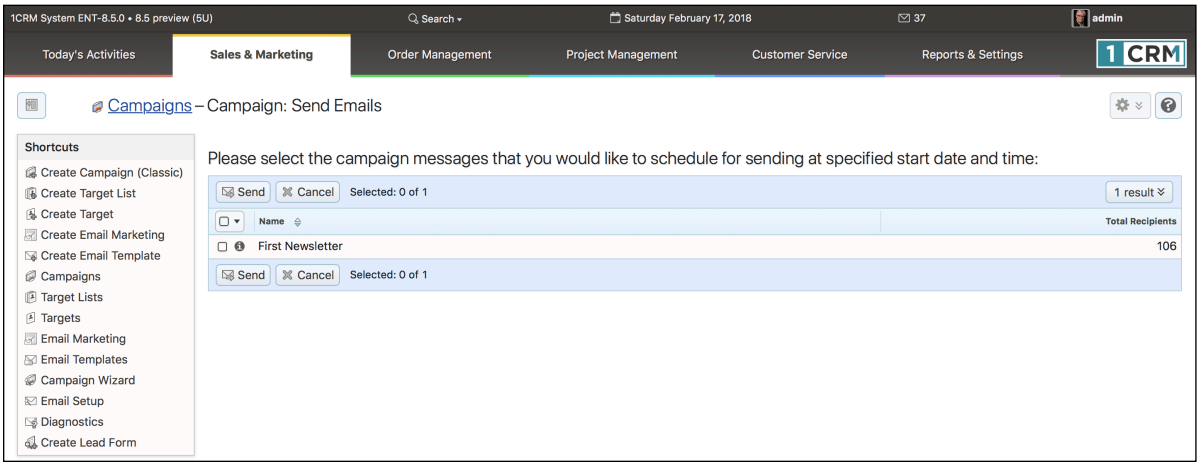


Figure 137: Sending Your Campaign Emails

On the screen shown above, individually select any Campaigns you wish to send out, or select all of them by clicking on the check-box beside the title of the *Name* column.

Note: Check that the *Total Recipients* number seems correct.

Then click on the *Send* button. All the appropriate emails will now be added to the Outbound Email Queue, as shown in Figure 138. Again, compare the *Total Recipients* number with the number of emails now in the Queue.

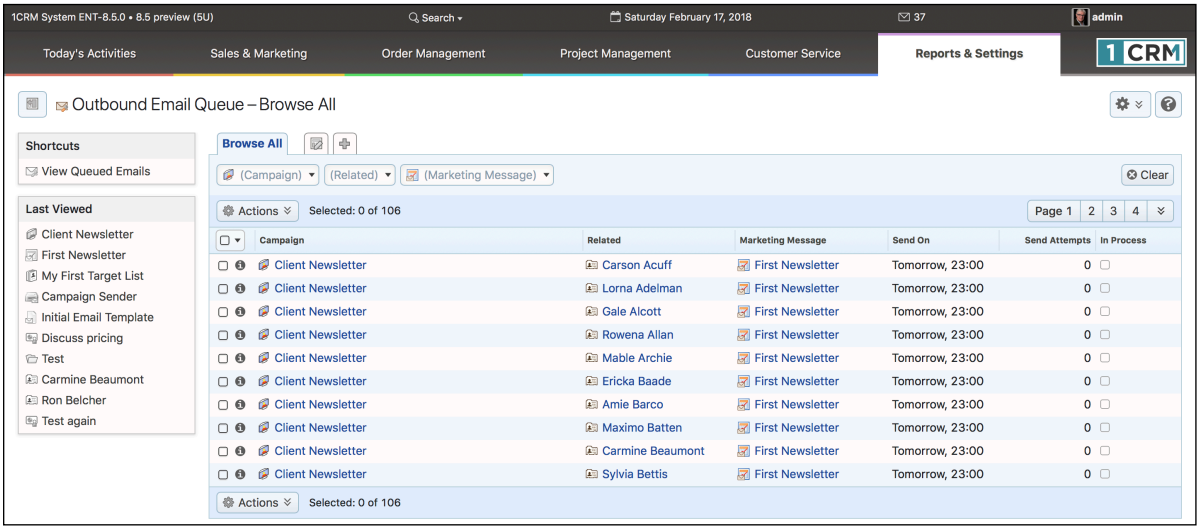


Figure 138: The Outbound Email Queue

Managing the Outbound Email Queue

If you run an Email Marketing program with a *Start Date & Time* in the future, the system waits until that date and time passes, and then (using the Scheduler) sends the emails in the outbound queue.

You may monitor and manage this Outbound Email Queue using the *Manage Email Queue* function within Admin (shown above).

Note: Nothing you can do will send queued emails before their due date and time. Also remember that the Scheduler is what normally sends these emails, and you need to make sure the Scheduler is active using *Diagnostics*, and that the specific Scheduler task *Send Campaign Emails* is active as well.

Note: The *Use Mailbox* Group Inbox on the Email Marketing program is where any email bounce-backs are sent. And the Scheduler task *Process Bounced Campaign Emails* needs to be active to process them.

Tracking Campaign Results

The *Status* tab on the Campaign Detail view provides a display of the status of any Email campaign.

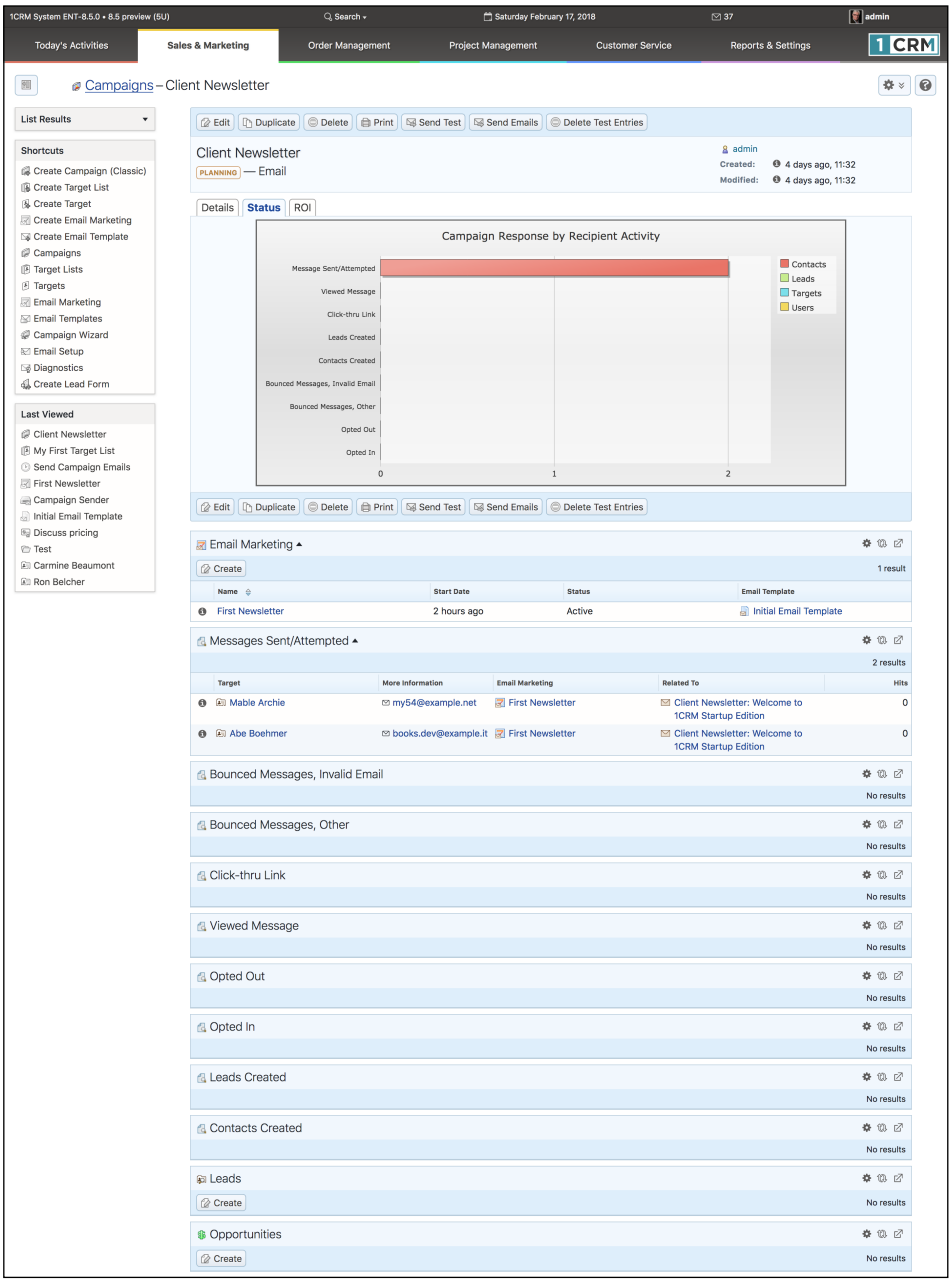


Figure 139: Campaign Status View

The *ROI* tab on the Campaign Detail view shows a Return on Investment chart for the Campaign, as shown in the figure below, using the data from Opportunities marked as *Closed - Won* that are related to the Campaign.

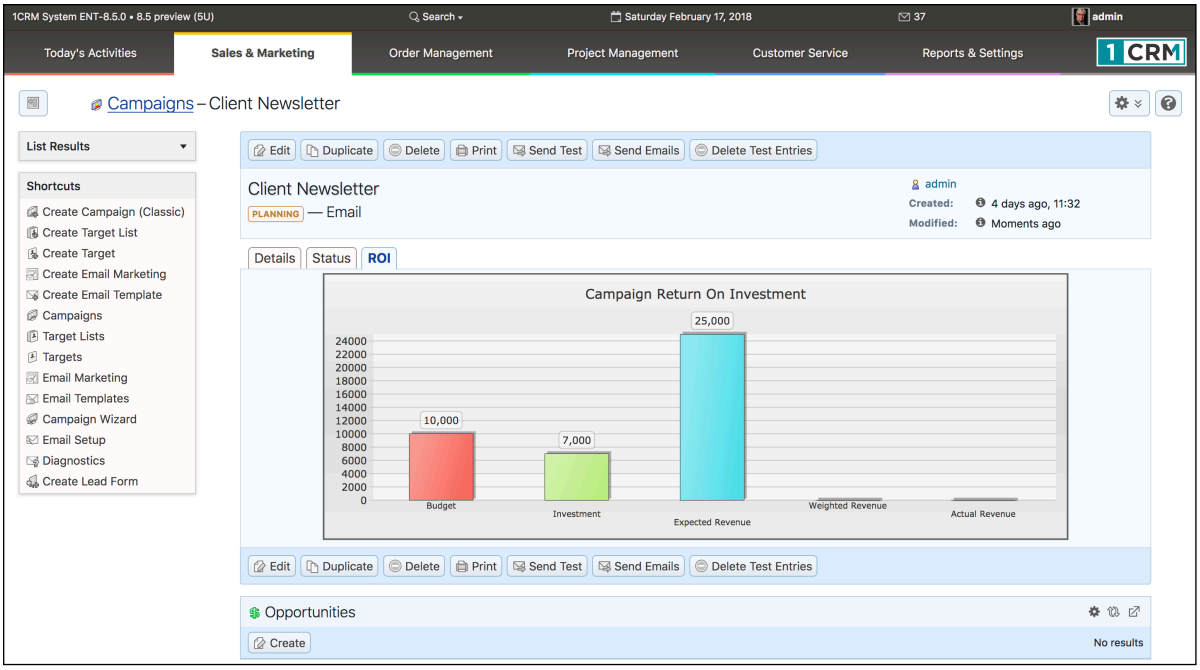


Figure 140: Campaign ROI Chart

5.3.5 Creating Web-to-Lead Forms

A really handy feature of 1CRM is its ability to create Web-to-Lead forms. Click on the *Create Lead Form* shortcut to start the process, and you will see a screen resembling the figure below. Using this screen, edit the field lists for either the first or second column of the Lead Form by clicking on them and selecting the fields desired. (Remember you can use the *Shift* key to select multiple items.) The Lead Form this feature creates may be integrated onto a public website, and then you may use the URL of that web page as the Target URL in one of your Campaigns. When a Target of the Campaign receives a Campaign email, and clicks on the Target URL, not only can you track this action, but when they go to the web page with the Lead Form and fill it out and submit it, it will insert a Lead in your 1CRM system.

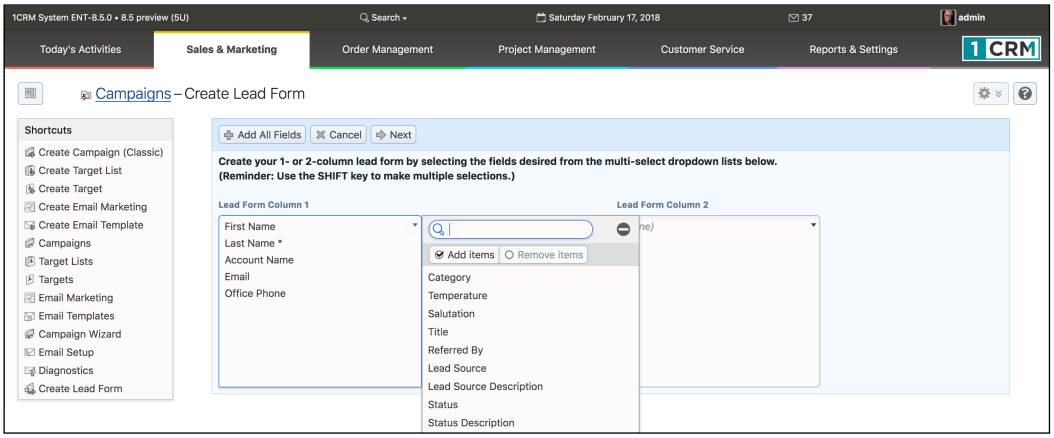


Figure 141: Creating a Lead Form - Step One

Once you have assembled the two column lists of fields you want captured, click on the *Next* button and you will see a screen resembling Figure 142.

Note: To add new fields to the Lead Form that are not part of the standard 1CRM system, first they must be added to the Leads module using the Studio, so that they may be added to the Lead Form using the screen shown above.

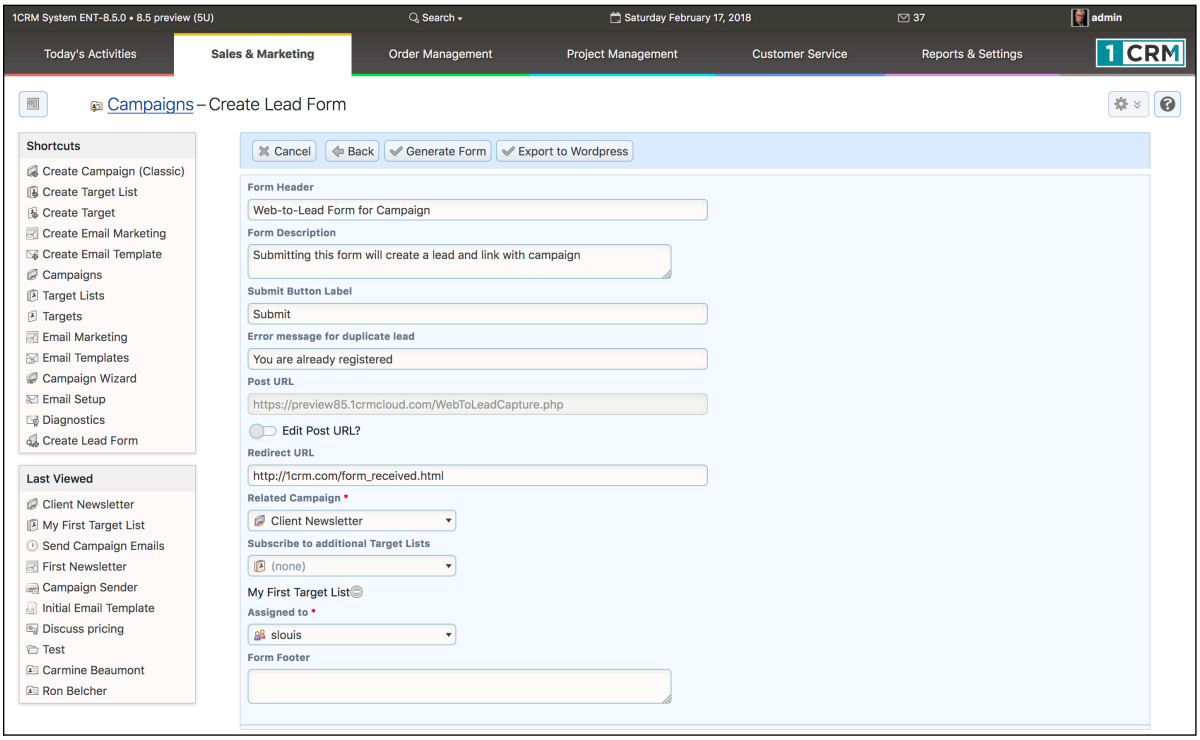


Figure 142: Creating a Lead Form - Step Two

On the screen shown above, you may edit the default *Form Header* text, as well as the *Form Description*, the *Submit Button Label* and the *Post URL* (you will need to check the *Edit Post URL* box first). You will also need to edit the *Redirect URL*, and select the *Related Campaign* and enter any *Form Footer* you may need. The *Redirect URL* is the URL where the user will be redirected after clicking on the *Submit* button on the Web-to-Lead Form.

When you click on the Generate Form button, the Web-to-Lead Form is generated and is displayed in the HTML editor as shown below in Figure 143.

Note: Use the *Export to WordPress* button when using your lead capture form with a WordPress website. See more information below.

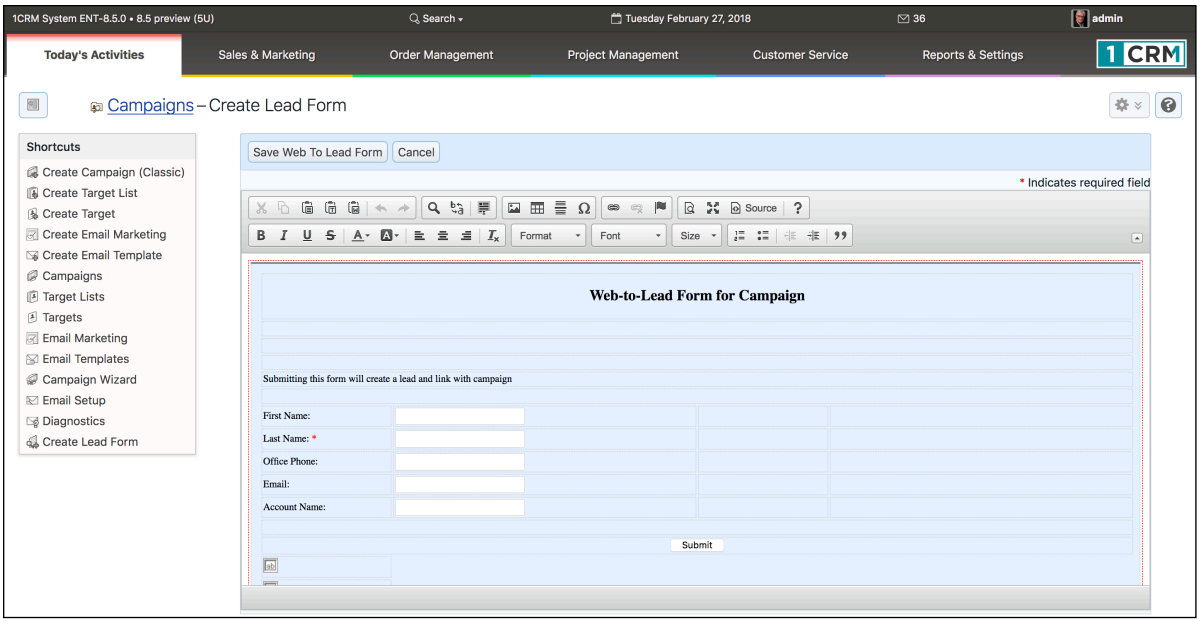


Figure 143: Creating a Lead Form - Step Three

The generated Web-to-Lead Form may be viewed and edited in the HTML editor, as shown in the figure above. When you click on the *Save Web To Lead Form* button, you'll see a message like this:

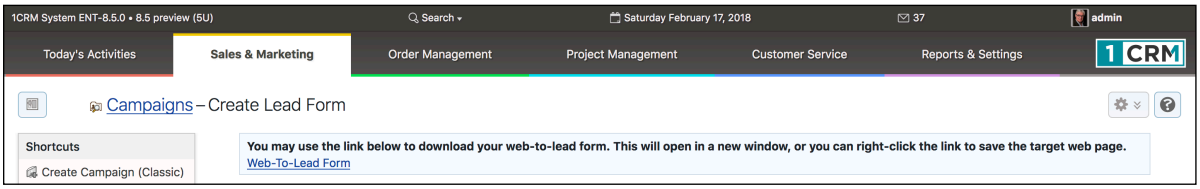


Figure 144: Creating a Lead Form - Step Four

You can download your form from this screen, and copy it to wherever you wish to use it. You will typically use it as partial HTML text to incorporate into a web page that cosmetically matches the pages of an existing web site.

5.3.6 Creating Web Forms with 1CRM WordPress Plugin

Back on Figure 142, if you click on the *Export to WordPress* button to generate your form, you will see a screen as shown below in Figure 145.

The code displayed on that screen is designed to be copied from there, and pasted into the 1CRM Lead Forms plugin, once it has been installed on your WordPress site. You can get that plugin here.

Once downloaded, installed and activated the plugin is displayed in the plugins list as shown in Figure 146. Figure 147 shows how to access the Lead Form plugin. Just click on *Add New* to add a new lead form to your WordPress site. Figure 148 shows the new lead form screen.

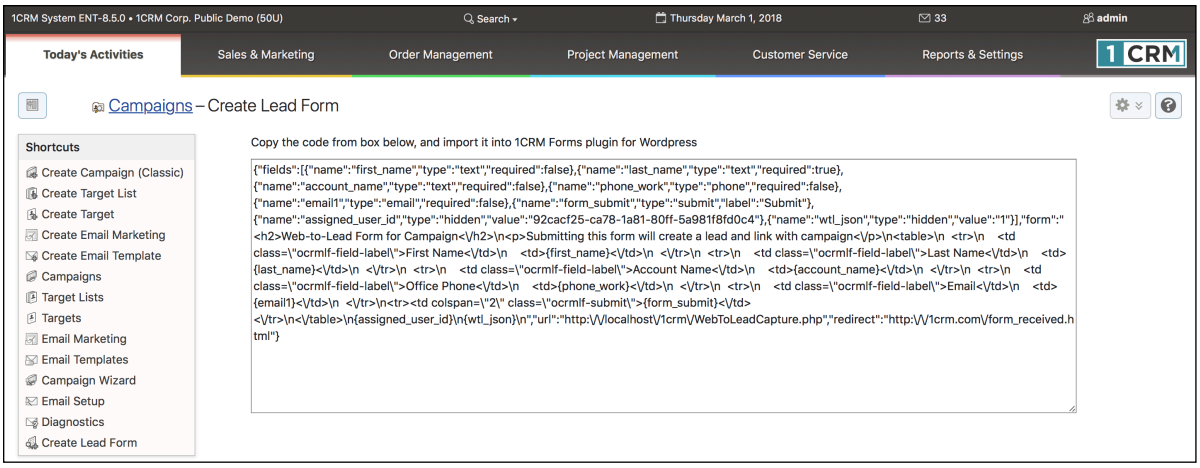


Figure 145: Creating a Lead Form for WordPress Sites

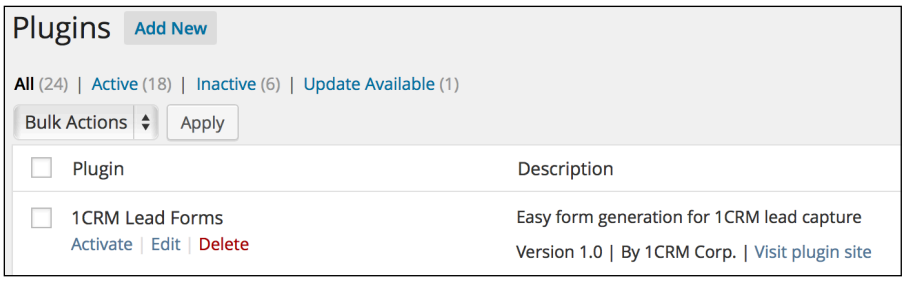


Figure 146: 1CRM Lead Forms Plugin Installed on WordPress Site

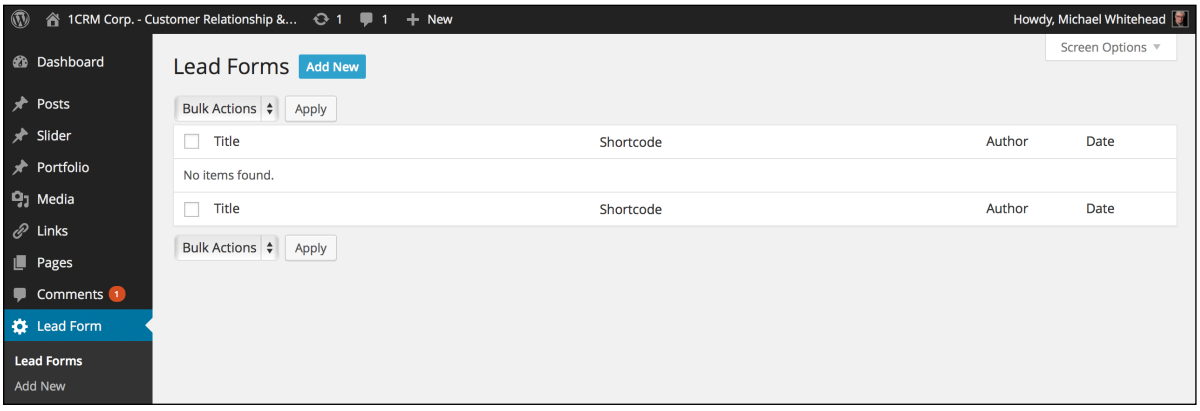


Figure 147: Using the Lead Forms Plugin in WordPress Site Administration

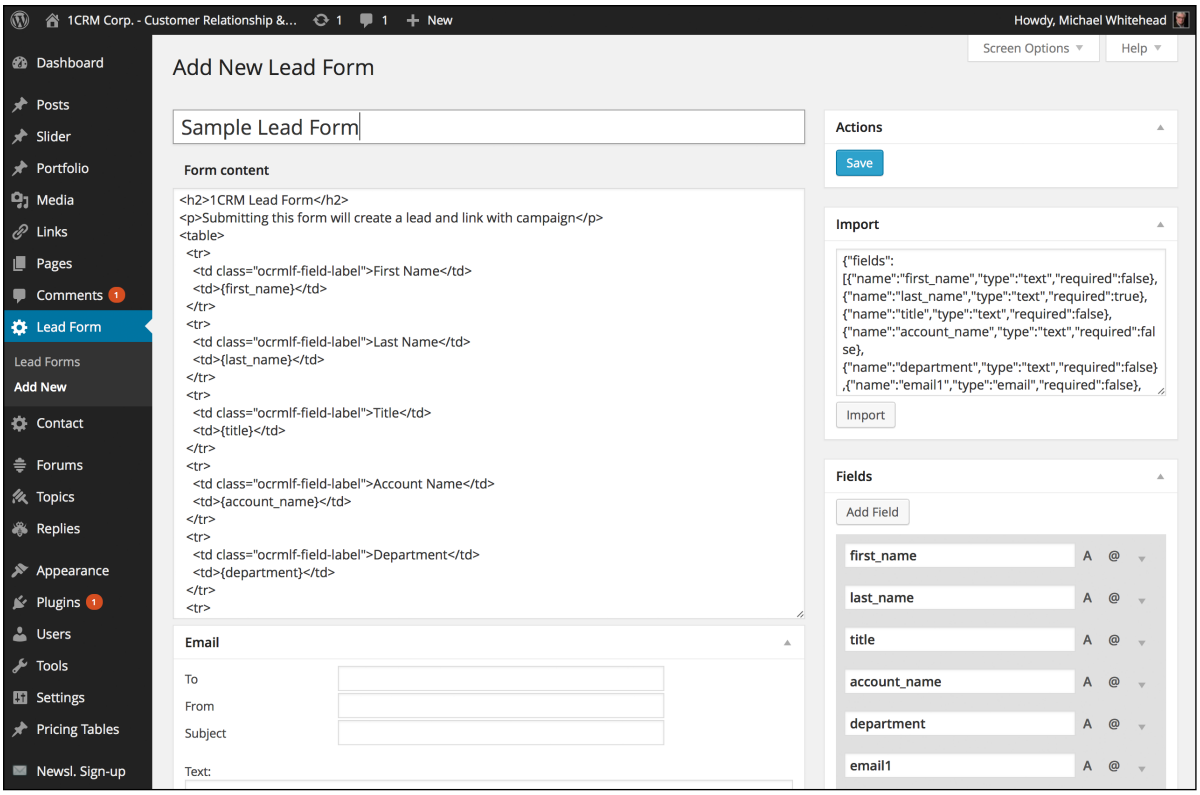


Figure 148: Importing Lead Form Data Created by 1CRM

Just paste the code from Figure 145 into the *Import* text box you see in Figure 148 and click on the *Import* button. This will instantly cause the *Form content* and *Fields* list to appear. Now just enter a name for the lead form, and the email notification and other settings, and click on *Save* to create your new lead form.

Note: Field settings can be adjusted to set Required fields, field types for validation, etc..

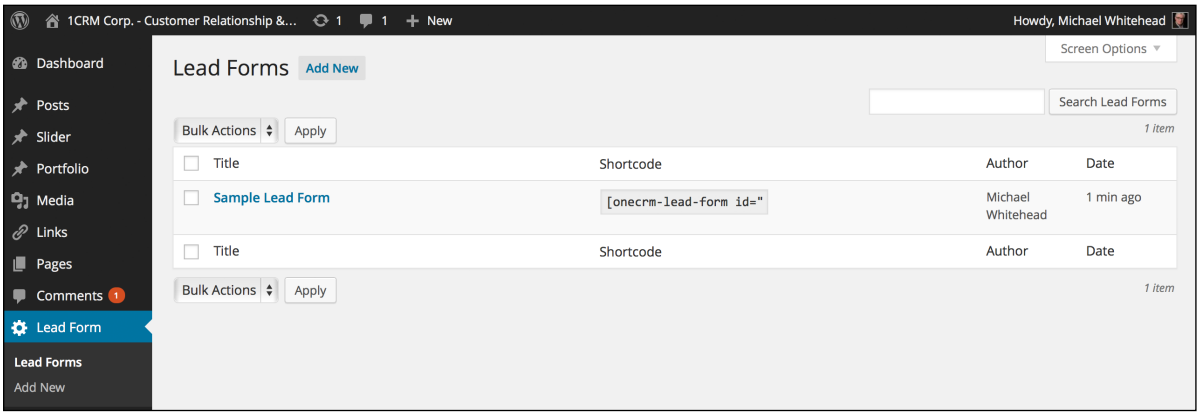


Figure 149: 1CRM Lead Form Added to WordPress Site

Now just copy and paste the shortcode for this form, as seen above, into any WordPress page, post or widget. Publish that content, and you instantly begin collecting lead data directly into your 1CRM system from your WordPress-based website.

5.3.7 Advanced Lead Forms Usage

In practice, potential clients of your business will be directed to your lead capture form pages by a link that is attached to some text, or perhaps an image, which tries to entice them to see what you have to offer.

There are two advanced options available for you to use when linking to these lead capture pages, which you can enable by appending some special text options to the link to that page. If your lead capture form is, for example, on the web page at http://mysite.com/leadpage.html, then you could link to this page and pass it somewhat hidden *Partner* and *Lead Source* information using links of the form:

1. http://mysite.com/leadpage.html?12
2. http://mysite.com/leadpage.html?_3
3. http://mysite.com/leadpage.html12_3

Let's assume the list of *Lead Source* values in your 1CRM system look like this:

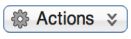
1. Cold Call
2. Existing Customer
3. Self Generated
4. Employee
5. Email
6. Other

Then example 1 above links to your lead capture page, and sets an associated *Partner* code to 12 for any lead that is captured. Example 2 will link to that page and will set the *Lead Source* value to option 3 (*Self Generated*). Example 3 combines both usages, and sets *Partner* code to 12, and a *Lead Source* of *Self Generated*.

The value of these advanced options is that you can provide your partners with unique URLs which include their Partner codes to use as links to your lead capture pages. Any *Leads*, *Opportunities*, *Accounts*, and *Invoices* that result will be automatically linked to that Partner, who will presumably be credited with some affiliate commission, or some similar arrangement. Similarly that Partner can set an overriding *Lead Source* value with their URL.

5.3.8 Creating Target Lists from List Views

A special feature of the list views for Contacts, Leads or Targets is the ability to take the current filtered list of Contacts, Leads or Targets, and use it to create a new Target list for use in Marketing Campaigns, or add to an existing Target list.

On the 

button in the list view for these three modules, there is an additional *Convert to Target List* option available. Just select the records on the current list view that you want added to a target list, and then choose this option. (Often you will want to use the *Select All* feature to choose all of the current items in a filtered list view.)

Now just choose between *Create New List* or *Add to Existing List*. For new lists enter the name and choose the list type. For existing lists, just choose which list. Once you have done that, just click to *Proceed*, and the new Target list will be created (if required) and the Contacts (or Leads or Targets) from the current list view will be added to the new or existing Target list.

5.4 The Leads Module

Figure 150 shows the 1CRM screen with the Leads Module selected:

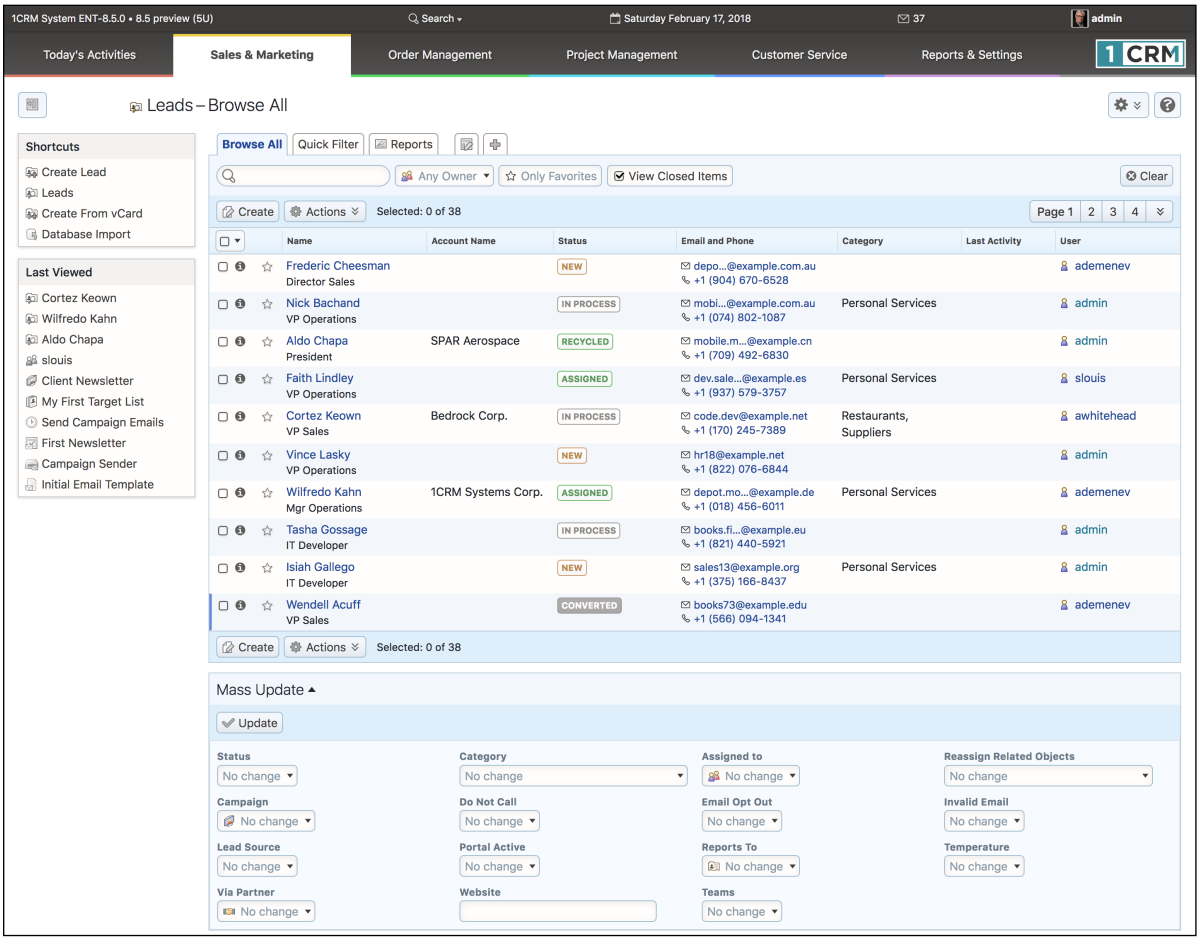


Figure 150: The Leads Module

Leads are early contacts in the sales process. Once they have been properly evaluated and assessed, they may be converted into Contacts, with associated Opportunities and Accounts, using the Convert button.

They may be managed and tracked through their life-cycle using the Leads module. Leads may be assigned a Lead Source of *Cold Call, Existing Customer, Self Generated, Employee, Partner, Public Relations, Direct Mail, Conference, Trade Show, Web Site, Word of Mouth*, or *Other*. They have a status of *New, Assigned, In Process, Converted, Recycled,* or *Dead*.

Leads may be duplicated (by clicking on the *Duplicate* button) as a handy way of creating a number of similar leads. Leads may also be converted (by clicking on the Convert button) to Contacts. Records may optionally be created for a related Account, Opportunity, and Appointment as a Lead is converted into a Contact.

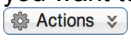
The Leads module has a Help icon on the title bar at the top of the main screen body, followed by a choice of layout tabs, and a list of all or selected Leads. The Leads list may be sorted by clicking on

any column title that has the ⬍ icon beside it. Clicking on a column title when it is already the highlighted sort column reverses the sort order.

The Leads list is paginated if it contains more items than may be listed on the display, and controls are provided to go to the start or end of the list, or step to the next or previous page. Clicking on any Lead in the list displays the detail information for that Lead.

Navigation shortcuts are provided to create a new Lead (from a vCard, or by simply typing it in), or to import bulk Lead data from Salesforce.com, etc…

Another particularly useful feature of the Leads module is that each Lead may be set to belong to one or more Categories (it has a multi-select ability). So, once your Category options have been defined in the Studio, each Lead may be marked as to which Categories they belong to, and the list view may be filtered to show only Leads that belong to one or more categories.

As well, you may use the filtered list of Leads (filtered by Categories as above, or whatever you like) in the list view to perform an ad-hoc bulk emailing. If you have the Leads displayed that you want to email (no more than 200 maybe selected), just choose the *Email Leads* option from the 

button and the Compose Email form will come up, with the email address of all these Leads added into the BCC line. Now simply select an email template or compose the text of your email, add a TO name (likely yourself), and click on *Send*.

Note: Only one email is sent, not one to each Lead – so do not use a template with personalization fields inserted into it, such as *$contact_first_name*, as they will not be personalized to each recipient.

Another handy use for a filtered list of Contacts is to perform a Mail Merge function with them. For more details, see the section in this guide that describes the Contacts module.

You can see a sample of an RTF Mail Merge template by downloading this file:

http://www.1crm.com/dl/Sample Mail Merge Document.rtf.

You may also see a video presentation on the use of the Mail Merge function here.

5.4.1 Import Options: Test Run & Custom Mapping

When importing Leads, note that as is the case with all import functions in 1CRM, you have the ability to specify that you wish only to perform a test run of the import by checking the *Test Run* box at the bottom of the page in Step 3 of an Import. This is an extremely valuable technique you should make full use of. If you import data (whether Leads or Products, Contacts, Accounts, etc..) that has errors or creates duplicates in your data, you have lowered the value of all the data in 1CRM. You have taken nice clean (and expensive) data and lowered its value by adding in some less clean data - potentially lowering the quality of the future usage experience for all users. What you really should do each time before you import some data is to do a trial run. This does not actually import your data, but simply produces a CSV file, probably much like your original input file but with extra columns on the right detailing any issues with errors or duplicates in the data.

Similarly you should make use of the *Save As Custom Mapping* option. Once you have gone to the trouble in Step 3 of an Import to map database fields to an input file's set of field names, if you are ever likely to use that same format again then make sure you save it for future use.

5.4.2 Quick Campaign

See the Contacts module section for a description of this feature.

5.4.3 The Convert Button & Smart Convert

In the Leads module, as well as several other modules in 1CRM, you will see a Convert button. This is used to move information from one step of a common business workflow, to the next. Convert a Lead to a Contact/Account. Convert a Quote to a Sales Order or Invoice. Convert an Opportunity into a Project. These are popular features in 1CRM as these are processes that users perform again and again. The Convert functions are quick and easy to perform, and automatically copy over all the right fields so users don't have to remember all the fields to copy.

But what about when the Administrator adds some custom fields to one of these items, and would like them to copy over to custom fields of the same name in the item that is the next step of the process? *Smart Convert* is the feature of the Convert button that makes this happen.

How does it work? Whenever you use the Convert button, 1CRM looks for custom fields on the item you are converting from. When it finds any, it looks for matching custom fields on the item you are converting to. Fields are matched by field name and type: fields that have identical names but different types in the two modules involved in a conversion are not copied to the target item.

The following *Smart Convert* processes are supported:

Purchase Order	→	Bill
Case	→	Bug
Lead	→	Contact
Case	→	Contact
Invoice	→	Credit Note
Opportunity, Project, Case	→	Invoice
Target	→	Lead
Quote	→	Opportunity
Contact	→	Opportunity
Account	→	Opportunity
Opportunity	→	Project
Sales Order	→	Project
Account	→	Project
Project	→	Project Task
Sales Order	→	Purchase Order
Opportunity	→	Quote
Purchase Order	→	Receiving
Invoice	→	Receiving
Credit Note	→	Receiving
Opportunity	→	Sales Order
Quote	→	Sales Order
Quote	→	Invoice
Sales Order	→	Shipping

5.5 The Opportunities Module

Figure 151a shows the 1CRM screen with the Opportunities Module selected. Navigation shortcuts are provided to create a new Opportunity, or to import bulk Opportunity data from Salesforce.com, SugarCRM, etc…

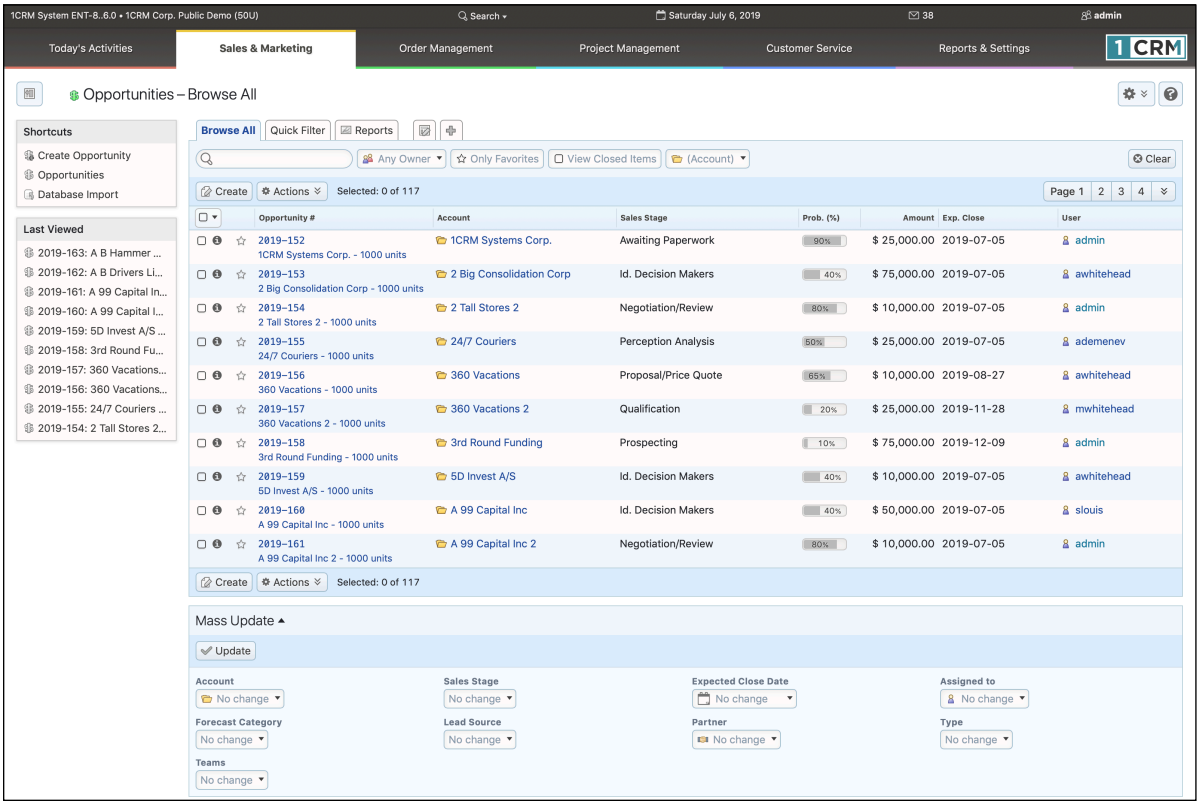


Figure 151a: The Opportunities Module

A sales Opportunity links many aspects of your business information together – an Account, Contacts, Activity History, Leads, and Documents. An Opportunity is typically tracked closely throughout its history, and must be assigned a Sales Stage of *Prospecting, Qualification, Needs Analysis, Value Proposition, ID Decision Makers, Perception Analysis, Proposal/Price Quote, Negotiation/Review, Closed Won,* or *Closed Lost*. A Probability % must also be associated with each Opportunity, and may be set to *0, 10, 20, 25, 30, 40, 50, 65, 80, 90 or 100%*. Lastly, each Opportunity also has a Forecast Category – see more details on this in the Forecasts module.

The Opportunities module has a Help icon on the title bar at the top of the main screen body, followed by a choice of layout tabs, and a list of all or selected Opportunities. By default, Opportunities with the Sales Stage *Closed Won*, or *Closed Lost* are filtered out. The Opportunities list may be sorted by clicking on any column title that has the ⬍ icon beside it. Clicking on a column title when it is already the highlighted sort column reverses the sort order.

The Opportunities list is paginated if it contains more items than may be listed on the display and controls are provided to go to the start or end of the list, or step to the next or previous page. Clicking on the name or opportunity number for any Opportunity in the list displays the detail information for that Opportunity. Clicking on the Account Name for an Opportunity will link to the detailed information for that Account. A handy feature permits an Opportunity to be converted to a Project, once the business has been won.

5.5.1 Revenue Forecast

Figure 151b shows an Opportunity with a Revenue Forecast Subpanel.

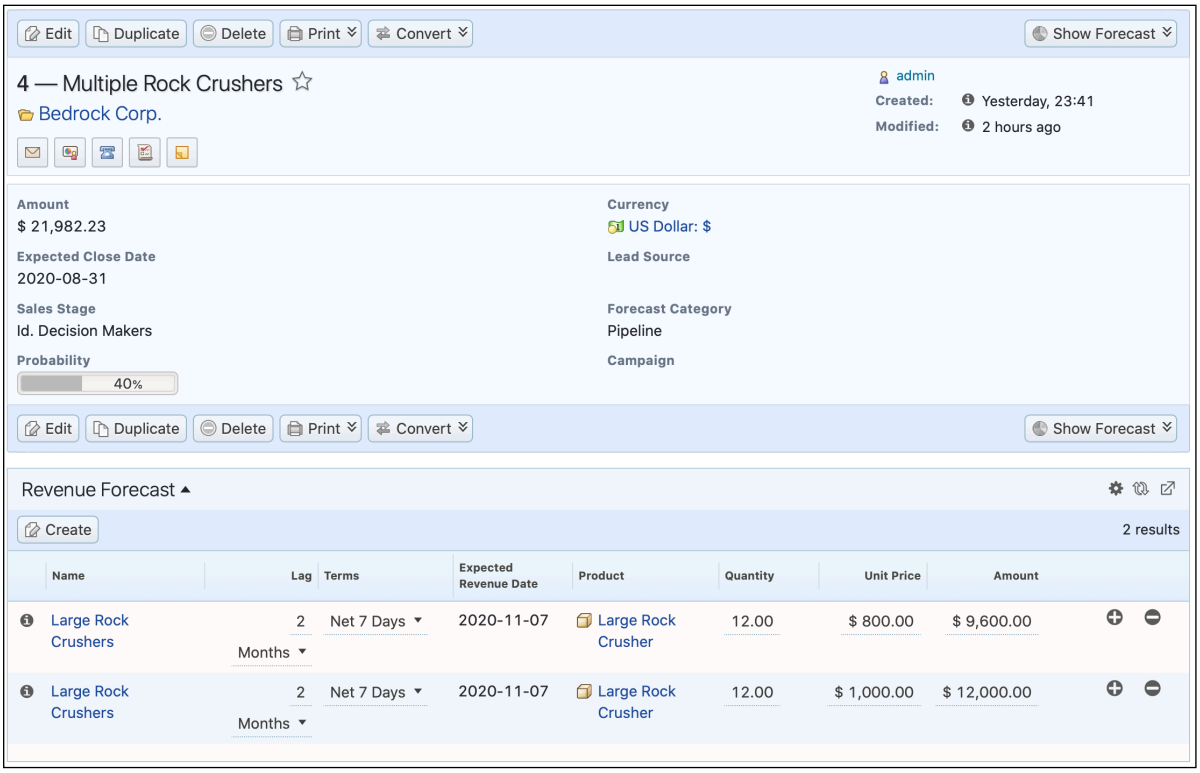


Figure 151b: Opportunity, Showing Revenue Forecast Subpanel

By default, the *Amount* of an Opportunity is just a value you type in. But you may optionally add entries to a Revenue Forecast subpanel, which will then cause the Amount field to be read-only, calculated as the total of the amounts from the subpanel entries. There is no requirement to use the Revenue Forecast subpanel at all if it does not suit your needs.

Why would you want to define these subpanel entries? There are two main reasons. First, so that the projected income from this opportunity can be modelled as more of an income stream than a single event. And secondly so that specific products, and quantities of those products, can be associated with an Opportunity - and the value of the Opportunity calculated from the extended price of those products. (If products are defined on one of these Revenue Forecast items, then they are added to the resulting Quote if the user converts the Opportunity to a Quote.)

Because Revenue Forecast entries allow you to more closely define a revenue stream from an Opportunity, each entry allows you to define the *Lag* of the calculated *Billing Date* for that entry compared to the *Expected Close Date* of the Opportunity. As well, the *Terms* of each entry may be defined in order to calculate the *Expected Revenue Date*. This information - the *Expected Revenue Date* and *Amount* of each Revenue Forecast entry is used to create a *Revenue Forecast Table*, which may be accessed from the Action button on the Opportunities list view. (See Figure below.)

For convenience, each Revenue Forecast entry on the subpanel has a ⊕ icon to the right, to enable you to duplicate the item, for speed of data entry. Each entry also allows you to edit the *Lag*, *Terms*, *Quantity*, *Unit Price* and *Amount* right on the lines of the subpanel, so you don't always have to go to the detail view for each entry. Each Revenue Forecast entry also has a ⊖ icon to the right, which may be used to delete the entry.

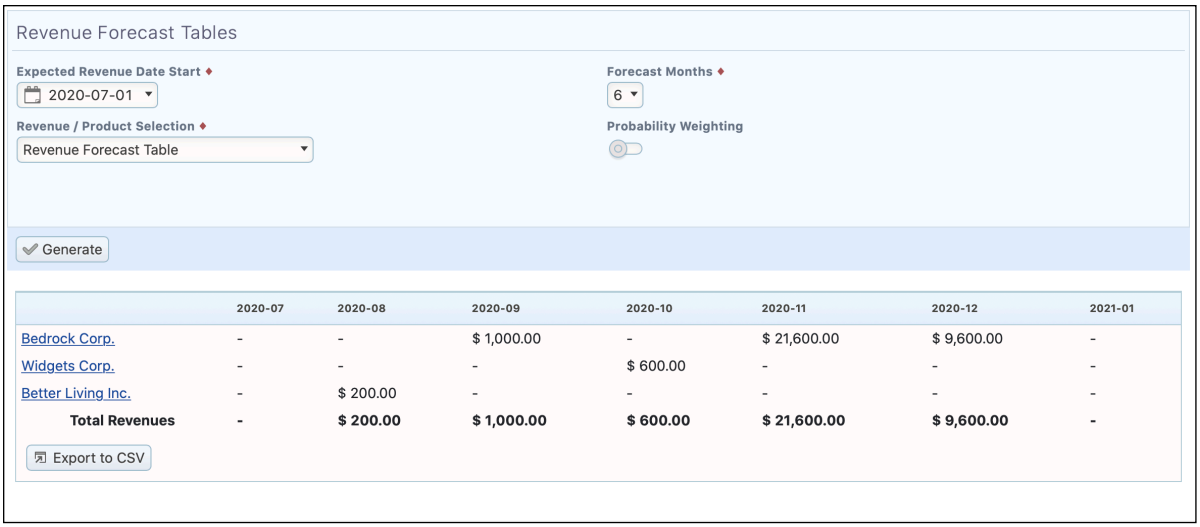


Figure 151c: Revenue Forecast Table

The *Revenue Forecast Tables* action shows a screen which has a specific focus on being able to export a CSV file for further use of the data in a spreadsheet program. You can select *Revenue Forecast Table*, or *Product Forecast Table*.

The *Revenue Forecast Table* has controls enabling the user to select the start date for the forecast, and the number of months (6, 12, 18 or 24) to forecast. There is also a *Probability Weighting* checkbox, which when enabled will discount every revenue item by the percentage probability of the opportunity it is linked to.

The *Product Forecast Table* has the same controls enabling the user to select the start date for the forecast, and the number of months to forecast. There is also a *Report Data Type* dropdown selector, which lets you choose between Product forecasts showing units, or value in your system currency. Of course, only Revenue Forecast entries which are linked to products will show in these tables.

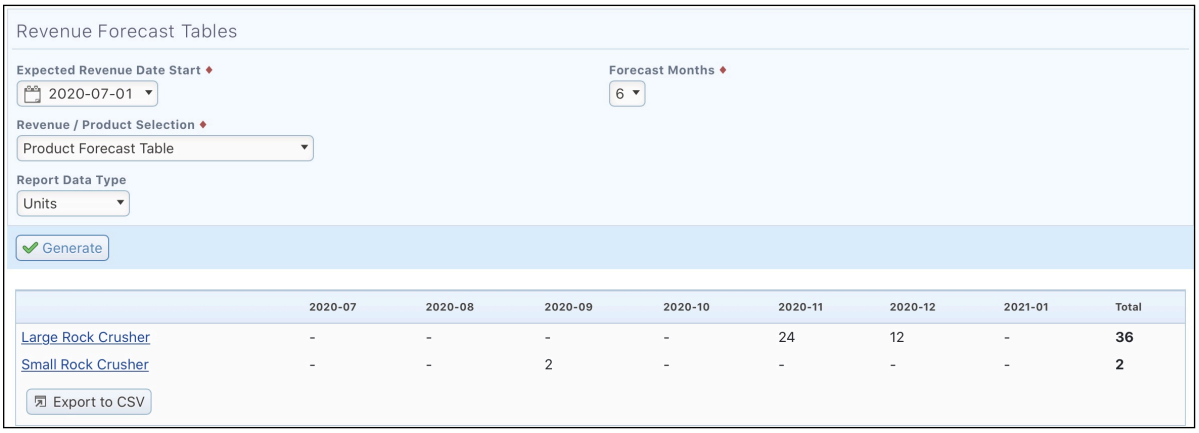


Figure 151d: Product Forecast Table

5.6 The Partners Module

Figure 152 shows the 1CRM screen with the Partners Module selected using the Partners navigation tab:

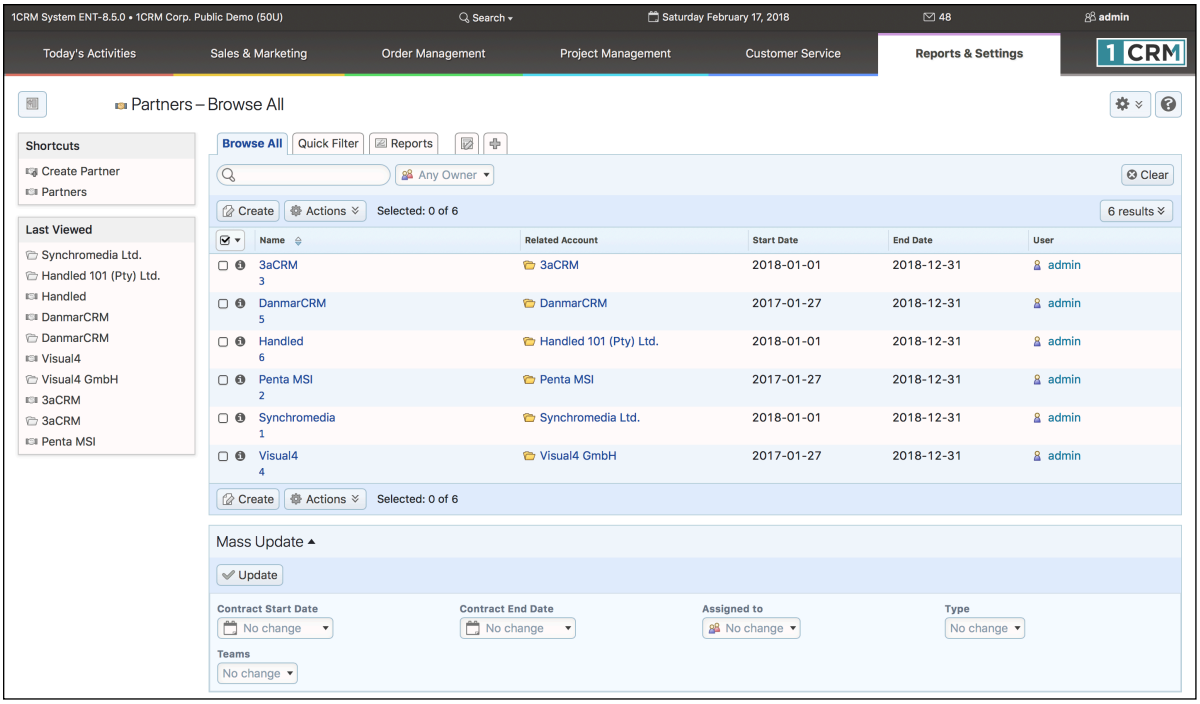


Figure 152: The Partners Module List View

The Partners module is used to define the sales partners your business may have, and to track their performance in finding and closing business. Accordingly, a Partner may be linked to Leads, Opportunities, Accounts, and Invoices, and on the Partner detail view you will see sub-panels for each of these four related modules. These sub-panels are extremely useful summaries of the new Leads, Opportunities, Accounts, and sales generated by a particular Partner.

Note: If you want to have the partner data mentioned above available to your business, you will have to make sure that users are careful always to add the link to the related Partner onto any new Leads, Opportunities, Accounts or Invoices that are created.

To create a new partner, use the *Create Partner* shortcut. The Partner edit view allows you to define a Partner code as a unique identifier for the Partner. As well, Start and End Dates may be defined for a contractual relationship. A commission rate may also be set, as well as the number of days the Partner retains any Lead exclusivity, or revenue sharing from Leads.

The Partners module has a Help icon on the title bar at the top of the main screen body, followed by a choice of layout tabs, and a list of all or selected Partners. The Partners list may be sorted by clicking on any column title that has the icon beside it. Clicking on a column title when it is already the highlighted sort column reverses the sort order.

5.6.1 Partner Access to the Customer Connection Portal

When Partners use the 1CRM Customer Connection Portal, it is possible for them to see not only the normal customer data shown there, but also special partner data. The additional partner functions

allow partners to view the Accounts, Opportunities and Leads associated to them within 1CRM, and also to enter new leads.

Note: In order for a portal user to be recognized as someone permitted to view partner-specific data within the Self-Service Portal, they must have their contact within 1CRM added to the *Portal Authorized Contacts* sub-panel on the detail view for their partner record, as seen in the Figure below. Any Contacts within 1CRM that are associated with the Account that is linked to the Partner record will only get normal portal access, unless they are specifically added to the *Portal Authorized Contacts* sub-panel on the Partner record. This allows some employees of the partner company to get the enhanced partner access to the Customer Connection portal while others do not.

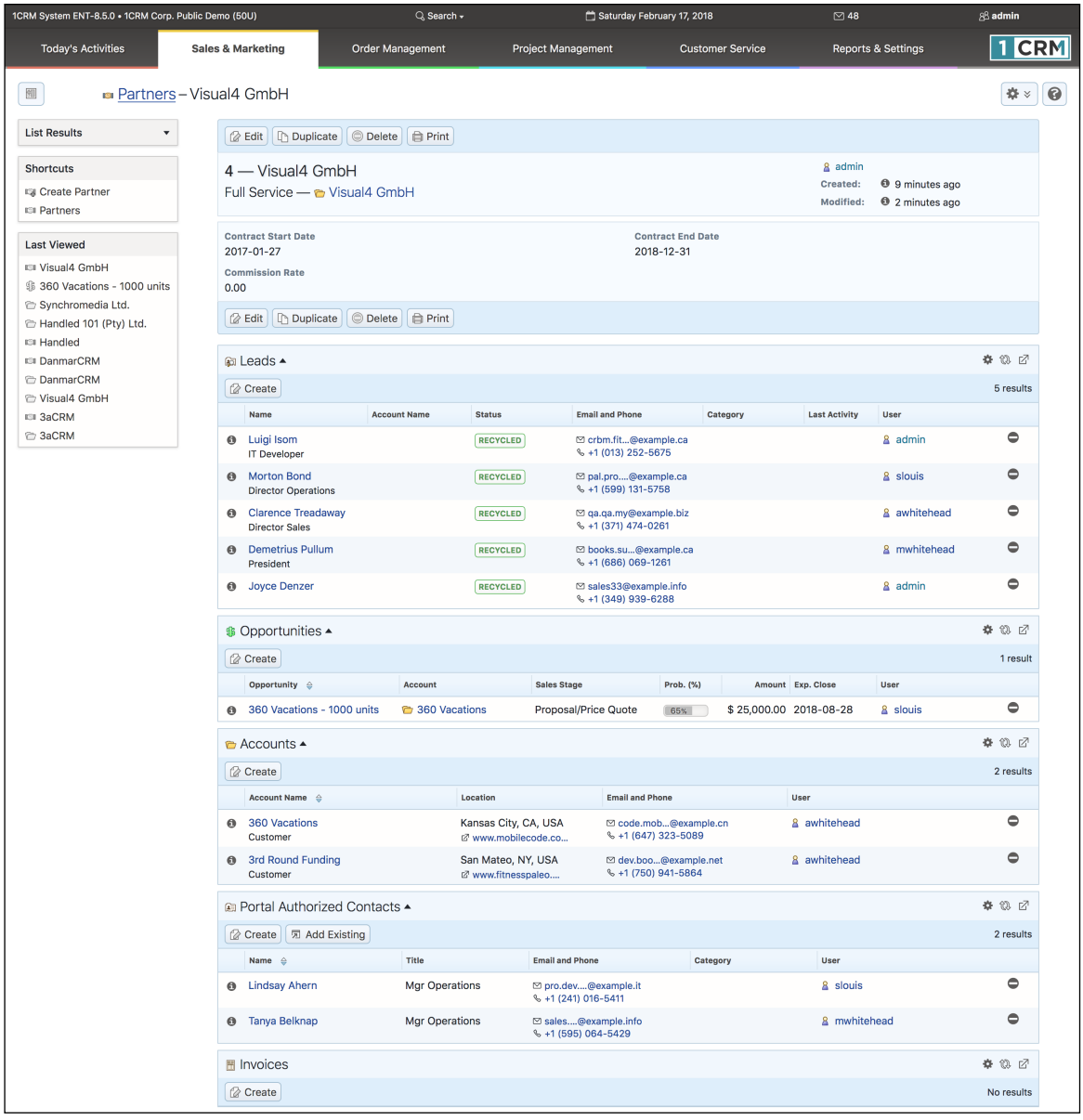


Figure 153: The Partners Module Detail View and Portal Authorized Contacts

5.7 The Marketing Events Module

Figure 154 shows the 1CRM screen with the Marketing Events Module selected using the Marketing Events navigation tab:

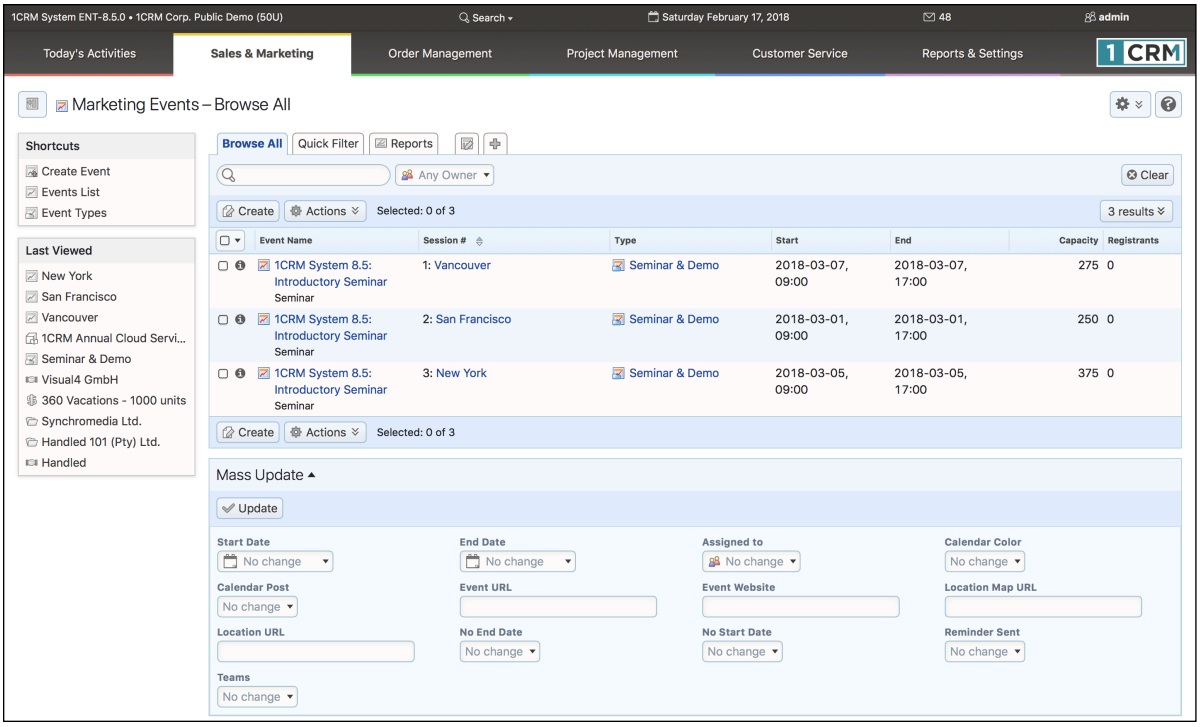


Figure 154: The Marketing Events Module

The Marketing Events module is included in 1CRM to provide a means to record your marketing events, and to track which Contacts and Leads registered for and attended them. As well, since invoices are linked to Marketing Events, you can also track the business generated by these Events.

A Marketing Event may have multiple sessions to it – and customer registration and attendance may be tracked separately for each session of the Event. In fact, when you look at the list view for Marketing Events, you are actually looking at a list of the sessions – so one Marketing Event may be shown several times if it has multiple sessions. The ability to have several sessions for a single Event is intended to support prolonged Events, such as a series of product update sessions on successive Fridays, or multi-session training Events. You can even use this feature for less tangible multi-session Events, such as mailing out newsletters monthly for a defined period of time.

Before you create any Events, you need to make sure that you have the right choices available to you for Event Type and Format. Event Format is a simple dropdown that may have its options set in the Studio. But Event Types are defined using the Event Types shortcut you will see in the shortcut list when you select the Marketing Events module. Once you have defined these two lists, you can go on to create an Event.

When a Marketing Event is first created, you define the Event Name, # of Sessions, Event Type, Format and Description in the top section of the screen, along with the product you are trying to promote with this Event. In the lower section of the Create Event screen (the Session panel), you set the information for the first (and perhaps only) Session associated with this Event.

This information includes the Session Name, Start Date and Time, End Date and Time, and lots of optional logistical information for the Session, such as capacity, hosts and guest speakers, URL, location, and catering information.

When you save this Event, you actually save the Event information, and that of the first session. If you edit the Event again, if the # of Sessions is defined as greater than one, you have the option to click on *Save and Next*, which will change the session panel information to the information for the second Session. You may now edit that information, and save it – or click on *Save and Next* to go on to the next Session – and so on.

Once you have defined all the information for all the Sessions of an Event, you can click on any Event/Session from the Event List view, and see the detail view for that Session of that Event. The Event detail view has several sub-panels:

- Contacts (or Accounts if the B2C business model has been selected in Company Information)
- Leads
- Reminders
- Invoices

The first two sub-panels show who is registered to attend this Session of the Event, and allow you to add new registrants. The Leads and Accounts/Contacts sub-panels may also be used to record attendance, which is very handy if you have a system running 1CRM at the door of the Event.

The Reminders sub-panel is used to define a series of reminder emails, each of which uses an Email template to define the email to be sent. By defining multiple Reminders for a Session you can maintain the level of interest and excitement in the upcoming Event for those people that are registered for it.

The Invoices sub-panel shows all the Invoices that have been entered with a relationship to this specific Session of this Event. This is a very handy feature if you are rigorously marking Invoices with the Event/Session that generated them. If you do, this screen will show you your payback from that Event/Session.

5.8 The Forecasts Module

Figure 155 shows the 1CRM screen with the Forecasts Module selected using the Forecasts navigation tab:

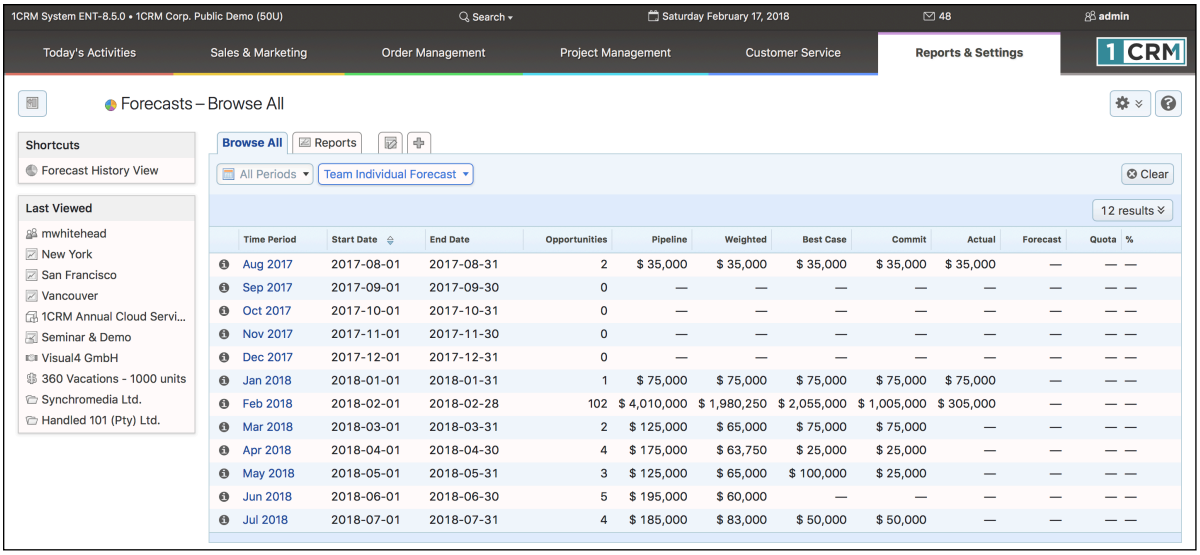


Figure 155: Forecasts Module (Forecast History View)

On entry, the Forecasts module shows a list view of sales forecast data for all available forecast periods (the *Forecast History* view). The filter panel lets you filter by forecast period. If any other employees report to you, a dropdown control is available to select between *My Forecasts*, *My Team Individual Forecasts* and *My Team Roll-Up Forecasts* (more on this distinction shortly). There is no mass update panel. The columns displayed are: Time Period, Start Date, End Date, Opportunities, Pipeline, Weighted, Best Case, Commit, Actual, Forecast, Quota and %.

These columns are calculated as follows:

- Opportunities = Number of Opportunities due to close in this period (opportunities with Forecast Category of *Omitted* are not counted).
- Pipeline = Total value of those opportunities.
- Weighted = Total value of opportunities due to close in this period, with each opportunity weighted by its % Probability.
- Best Case = Total value of opportunities due to close in this period where Forecast Category is *Best Case*, *Commit* or *Actual*.
- Commit = Total value of opportunities due to close in this period where Forecast Category is *Commit* or *Actual*.
- Actual = Total value of opportunities closing in this period with Forecast Category of *Actual*.
- Forecast = Latest forecast committed for this period.
- Quota = Latest quota set for this period.
- % = Actual / Quota as a %.

To understand forecasts, you must first understand that each user may have a sales quota and a sales forecast, both individually and for their team. For any user that has no reports (no other users are marked in Admin as reporting to them), their team numbers are irrelevant, and are the same as

their individual numbers. For any user that does have reports, their team numbers are calculated as the totals for themselves plus all the users that report to them – either directly or indirectly (an indirect report is a user that reports to someone who reports eventually to the user in question).

So – for example, in the screen above – if *My Forecasts* is selected, then the numbers shown are just for you. If *My Team Individual Forecasts* or *My Team Roll-Up Forecasts* are selected, then Opportunities, Pipeline, Weighted, Best Case, Commit and Actual are calculated as a total of the individual values from you and all your direct and indirect reports. Forecast and Quota, however, are shown differently in the two team views. In *My Team Individual Forecasts*, Forecast and Quota are calculated as a total of the individual Forecasts and Quotas for each member of your whole team. In *My Team Roll-Up Forecasts*, Forecast and Quota are the team quota assigned to you, and the team forecast you have committed. This distinction, on both the history and worksheet forecast views, allows you to see the difference between the total of a team's individual forecasts and quotas, and the actual aggregated team forecast and quota, at all management levels in the sales hierarchy that report through you.

There are a few other important principles you need to grasp to understand how forecasts work in 1CRM:

1. In the *Company Info* section in Administration you can choose to forecast by Quarter, or by Month. Forecasting is initially set to *Monthly* - the dropdown selector can be set to *Monthly*, or *Quarterly*. There are two more fields on this screen that control forecasts - *Retain xxx History Periods,* and *Retain yyy Forecast Periods*. A scheduler task looks regularly to see if old forecast periods need to be erased, and new ones added. If the administrator tries to change from *Monthly* to *Quarterly* or vice versa – they receive a warning that all forecast data will be erased. The scheduler task is also run each time these values are saved – to ensure the right forecast periods exist. Each forecast period has a default start and end date, and they may be edited.
2. Each Opportunity has an important field – *Forecast Category*. It is a dropdown field, with the choices – Omitted, Pipeline, Best Case, Commit, Closed – it is usually controlled by setting the Sales Stage or Probability % for an opportunity.
3. If when editing an opportunity, the user changes the selected value for *Sales Stage*, then the *Probability* and *Forecast Category* for that opportunity will automatically be changed as per the table below. *Probability* and *Forecast Category* will both remain editable however. The *Forecast Category* determines if the value of an opportunity is included (for the user it is assigned to) in their forecast-related totals for the Pipeline, Best Case, and Commit categories. An opportunity with a *Forecast Category* of Best Case will be added into the user's totals for Best Case as well as Pipeline. If it has a *Forecast Category* of Commit, it will be added into the user's totals for the Commit, Best Case and Pipeline categories.

Sales Stage	Probability	Forecast Category
Closed Won	100	Actual
Closed Lost	0	Omitted
Prospecting	10	Pipeline
Qualification	20	Pipeline
Needs Analysis	25	Pipeline
Value Proposition	30	Pipeline
ID Decision Makers	40	Pipeline
Perception Analysis	50	Best Case
Proposal	65	Best Case
Negotiation	80	Commit
Awaiting Paperwork	90	Commit

The shortcuts in the Forecasts module let you select the *Forecast Worksheet* view, or go back to the *Forecast History* view (the default).

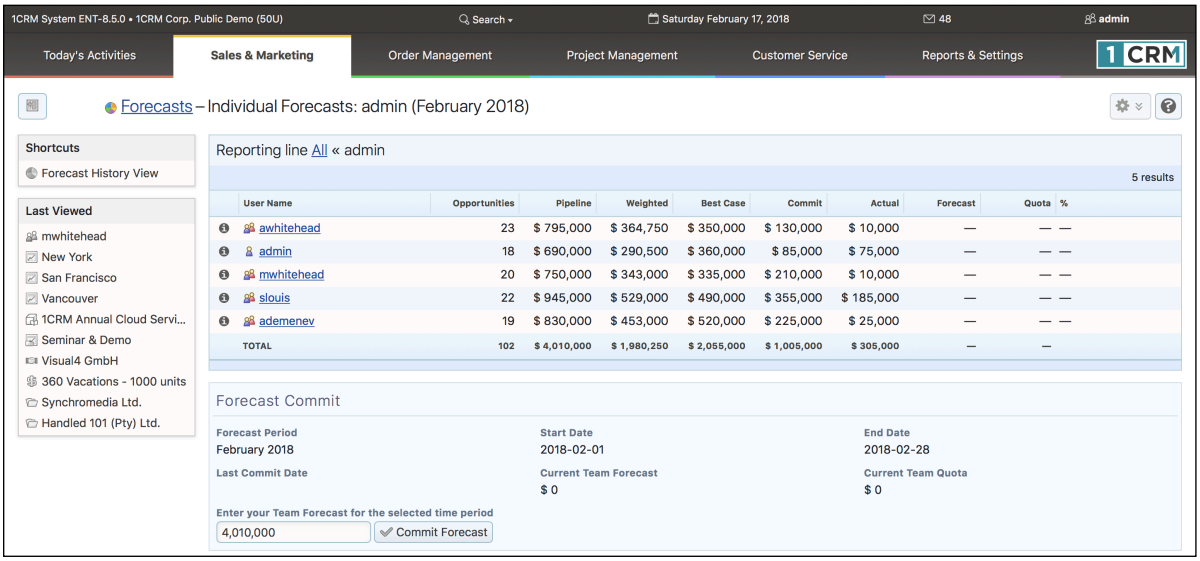


Figure 156: Forecasts Worksheet – My Team Individual Forecasts

In the *Forecast Worksheet* view, the filter panel requires you to filter to a specific forecast period (the default is the current period), and a dropdown control selects again between *My Forecasts* (default), *My Team Individual Forecasts* (where your team consists of you and all your direct and indirect reports – see an example in the figure above), and *My Team Roll-Up Forecasts* (where your team consists of you and all your direct reports).

Note: The dropdown control is not displayed for users with no reports, and the *My Forecasts* view is shown.

5.8.1 Committing Personal and Team Forecasts

On the *Forecast Worksheet* view – if the user selects ***My Forecasts***, these two panels are displayed: *Forecast Opportunities*, and *Forecast Commit*. The Forecast Opportunities panel shows all opportunities belonging to the current user (columns are: Opportunity Name, Account, Amount, Probability, Forecast Category, & Weighted Amount). Totals are shown under each column.

The *Forecast Commit* panel shows the name and date range for the period selected, and the last commit date and amount for that period. There is also a field prompting *Enter your Personal Forecast for the selected Time Period*, and a *Commit Forecast* button. This is used to commit the personal sales forecast by the current user, for the time period selected.

On the Forecast Worksheet view – if the user selects ***My Team Individual Forecasts***, these two panels are displayed: *Individual Forecasts*, and *Forecast Commit*.

The *Individual Forecasts* panel shows a list of all users that are direct or indirect reports to the current user, plus the current user as well. The columns displayed are: User Name, Opportunities, Pipeline, Weighted, Best Case, Commit, Actual, Forecast, Quota and % (Actual / Quota as a %). All the numbers displayed come from each user's individual forecast values (not their team's forecast totals). There are totals displayed under all the columns.

The *Forecast Commit* panel shows the name and date range for the period selected, and the last commit date and amount for that period. There is also a field prompting *Enter your Team Forecast for*

the selected Time Period, and a *Commit Forecast* button. This is used to commit the team sales forecast by the current user, for the time period selected.

On the *Forecast Worksheet* view – if the user selects ***My Team Roll-Up Forecasts***, these two panels are displayed: *Roll-Up Forecasts*, and *Forecast Commit*.

The *Roll-Up Forecasts* panel shows a list of users including the current user and all their direct reports (no indirect reports on this view). The columns displayed are: User Name, Opportunities, Pipeline, Weighted, Best Case, Commit, Actual, Forecast, Quota and %. All the numbers displayed come from each user's team forecast totals (not their individual forecast values) – except the numbers for the current user – that user's individual forecast numbers are used. This is because the current user's team forecast is correctly based on adding the team forecast of all his direct reports to his own personal sales forecast. There are totals displayed under all the columns.

The *Forecast Commit* panel shows the name and date range for the period selected, and the last commit date and amount for that period. There is also a field entitled *Enter your Team Forecast for the selected Time Period*, and a *Commit Forecast* button. This is also used to commit the team forecast by the current user, for the time period selected.

5.8.2 Setting Personal Sales Quotas

If you click on the name of an employee in the *Individual Forecasts* panel (see ***My Team Individual Forecasts*** above), then the screen changes to show the forecast opportunities for that employee. These two panels are displayed: *Forecast Opportunities*, and *Sales Quota*.

The *Forecast Opportunities* panel shows all opportunities belonging to the selected user (the columns displayed are: Opportunity Name, Account, Amount, Probability, Forecast Category, & Weighted Amount). Totals are shown under the Amount and Weighted Amount columns.

The *Sales Quota* panel shows the name and date range for the period selected, and the last quota date and amount for that period. There is also a field prompting *Set the Individual Sales Quota for this employee for the selected Time Period*, and a *Set Quota* button, which may be used to set the personal sales quota for this user for the period selected.

5.8.3 Setting Team Sales Quotas

If you click on the name of an employee in the *Roll-Up Forecasts* panel, then the Roll-Up Forecasts are displayed for the employee selected – the next level down in the hierarchy. These two panels are displayed: *Roll-Up Forecasts*, and *Sales Quota*. This is basically the same screen you were on, one level down in the organization – except that now you are not setting your own committed roll-up sales forecast, but the sales quota for those who work for you.

The *Roll-Up Forecasts* panel is just the same as described above.

The *Sales Quota* panel shows the name and date range for the period selected, the last forecast (and date) committed by that user for his team for that period, and the last quota (and date) set for his team for that period. There is also a field prompting *Set a Team Sales Quota for this employee for the selected Time Period*, and a *Set Quota* button. If a Quota is set, it is the Team Quota value for this user for this period.

This drilling down process through the direct reports can continue until you get to users with no one reporting to them, for whom you can set a personal sales quota as above.

5.9 The Documents Module

Figure 157 shows the 1CRM screen with the Documents Module selected:

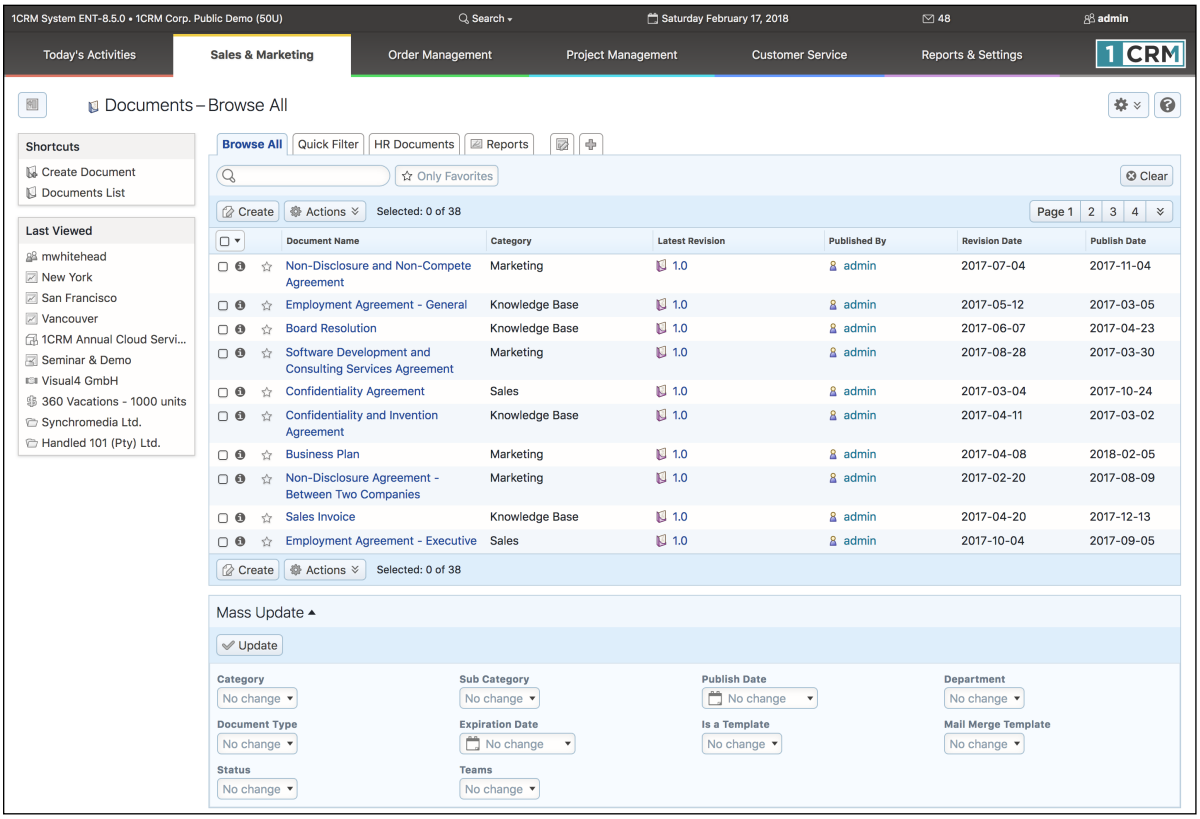


Figure 157: The Documents Module

The Documents module has a Help icon on the title bar at the top of the main screen body, followed by a choice of layout tabs, and a list of all or selected Documents. The navigation shortcuts provided will help you create a new document, or switch back to the Document List view.

The Document list may be sorted by clicking on any column title which has the icon beside it. Clicking on a column title when it is already the highlighted sort column reverses the sort order. The Document list is paginated if it contains more items than may be listed on the display, and controls are provided to go to the start or end of the list, or step to the next or previous page. Clicking on any Document in the list displays the detail information for that Document.

Successive revisions of a document may be attached to a document record within 1CRM, and so each document may contain more than one file attachment. At any given time, one (and only one) of the revisions is always marked as the current revision, and this is the version which will be downloaded when the user clicks on the file download link in the Document List view.

The main document record specifies the category and sub-category, status (*Draft, To Be Approved, Approved,* or *Archived*), which of the attached revisions is the one currently in use, which department created and owns the document, a description (or abstract) of the document, and a list of keywords which apply to the document – to be used when searching for it. (Note: Multiple keywords should be separated by commas, both in the document record, and when performing a search. During a search, multiple keywords are OR'd.)

Each revision attached to a document record contains its version number and Change Log notes on that revision. The default maximum file upload is 20 Mbytes, which can be adjusted by your admin.

5.9.1 Drag and Drop Support

While typically a new Document might be added to 1CRM by clicking on the *Create Document* shortcut, or the *Create* button at the top of the list view, you can also create a Document by a simple *Drag and Drop* action.

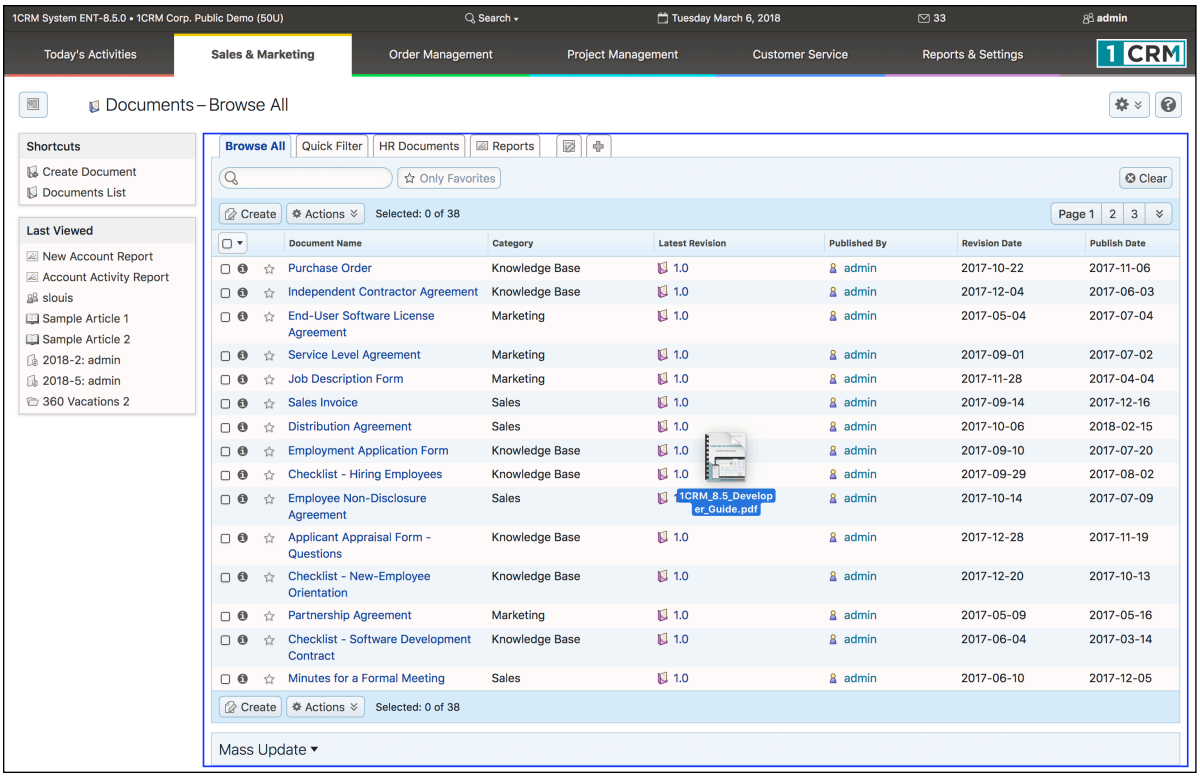


Figure 158: Documents List View Drag and Drop

The Figure above shows a file being dragged into the Documents list view. When the main portion of the list view is highlighted as shown one or more files may be dropped to automatically create a new Document(s).

Settings in *Admin - System Settings* are used by your Administrator to define the defaults (if any) to be used for the Document's *Category*, *Status* and *Department*. The Document *Name* is set to the full file name including extension.

This same Drag and Drop process is also supported in the Notes module, where when a file is dropped into the Notes list view, a new Note is created and the file is saved as an attachment to that

Note: The Note *Subject* is set to the full file name including extension.

The above scenarios create a new Note or a new Document. That's certainly useful, but sometimes you'd like those new Notes or Documents to be related to some other item of information within 1CRM, such as a Case, an Account, a Contact or a Lead.

There is also a way to do this in 1CRM, if your Administrator enables the appropriate option in the *Drag and Drop Support* panel of the *Admin - System Settings* screen.

- If you go to an Account detail view (the same process applies for most modules in 1CRM) and Drag and Drop one or more files onto the History or Documents subpanel (see Figure below) it will create one or more new Notes or Documents just as explained above. But in addition the new Notes or Documents will be related to the Account.

Furthermore, if you Drag and Drop a file onto a subpanel of a Case, the new Note or Document will be related to the Case, and then also related to the Account that is set on the Case. This also works for Bugs, Projects, Contacts and most other modules that can have a related Account.

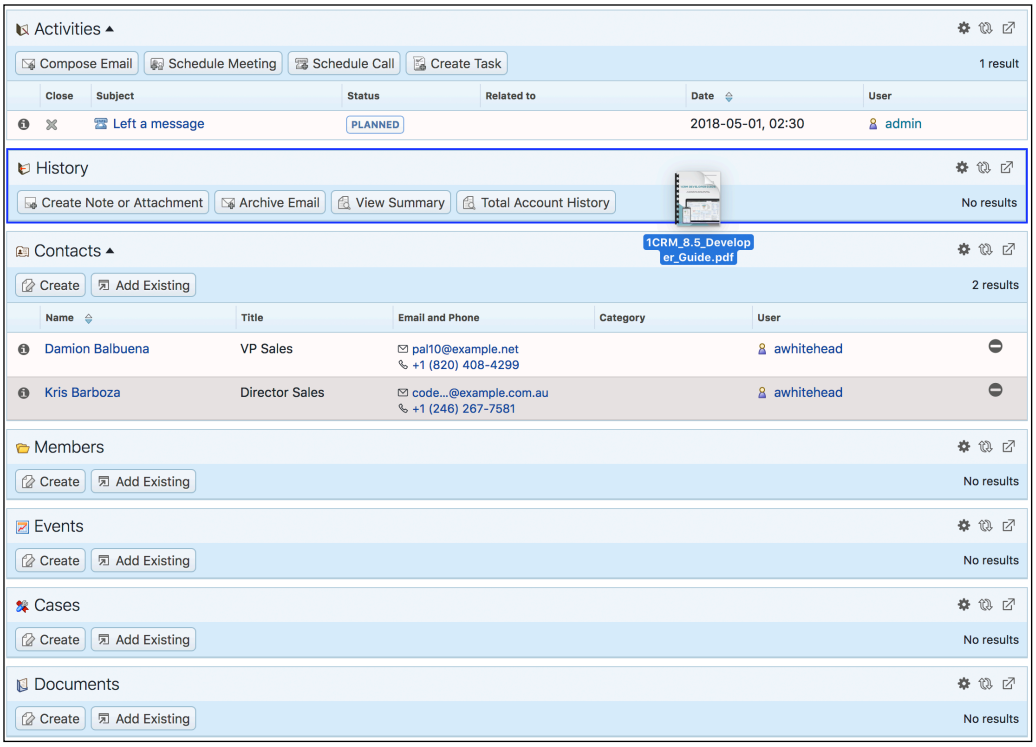


Figure 159: Account Detail View Drag and Drop

5.10 The Signing Projects Module

The 1CRM Signing Projects module is where users can see their Electronic Signature projects. To activate this module you will first need to purchase the Electronic Signatures add-on from 1CRM.

The Signing Projects module is slightly different from a regular List View module as you are not able to create signature projects from this screen, instead you will have the following columns available for you to browse. *Document name, related Document Name, User Assigned To, Status and Last Modified*. You can adjust these by creating a new Smart List tab and selecting from any other fields available in the record.

Inside a Signing Project record you will see various new fields not found elsewhere inside 1CRM:

- *Total Actions* - This refers to the number of total actions that a Signing Project has to be completed before it can be considered finished, this can be either an Approver or a Signer.
- *Remaining Actions* - This refers to the number of actions remaining, for example, if a document required two signers and one had completed their signature yet one had not, the total number of actions remaining would be one.

- *Signature Status* - This refers to the status of the project, the available statuses are Not Stared, In Progress, Complete or Expired.
- *Parallel Actions* - This checkbox lets the user know whether parallel actions were active on this project, parallel actions is where all signers receive the document at the same time to sign. If this checkbox is off than the signers will receive the document once the previous person has completed their signature. The order of the people in the Actions widget is the order of the signers that will receive the document.
- *Expires On* - This signals the date in which the document will expire, this cannot be changed inside of 1CRM.
- *Actions* - This table shows the total actions that must be completed before the document can be considered Completed. The table will display the *Type of signer (Signer or Approver), Name, Email, Phone and Status.*

A copy of the Audit Trial will also be uploaded and found in PDF format inside the Audit Trail field, this audit trail will either be in English or French depending on the preference of the user that triggered the Signature workflow.

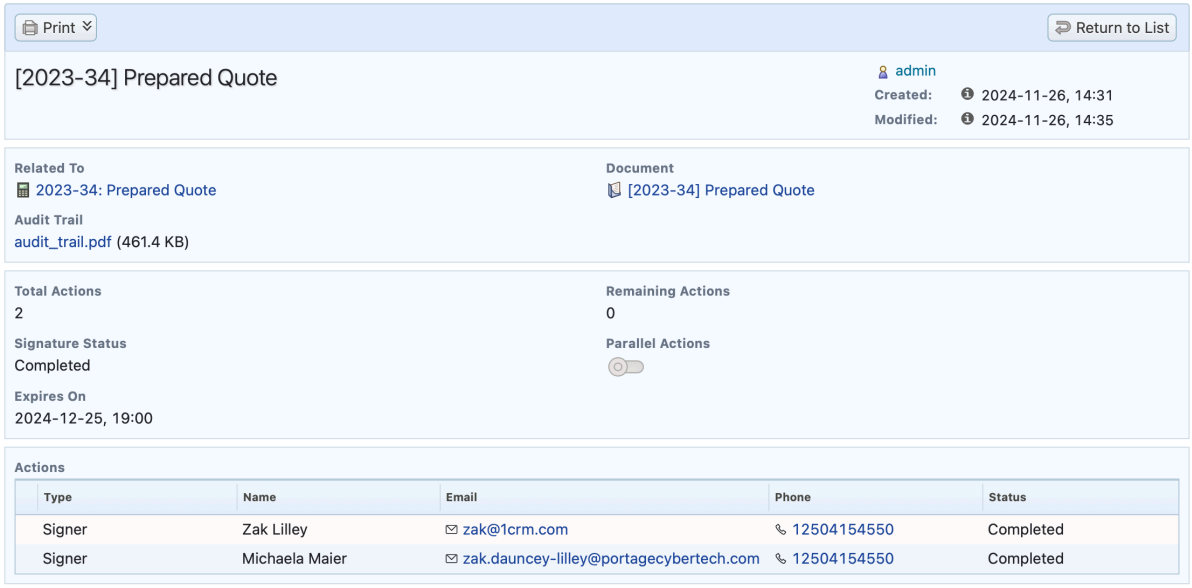


Fig 159a: Signing Projects Detail View.

6.0 Order Management

6.1 The Quotes Module

Figure 160 shows the 1CRM screen with the Quotes Module selected:

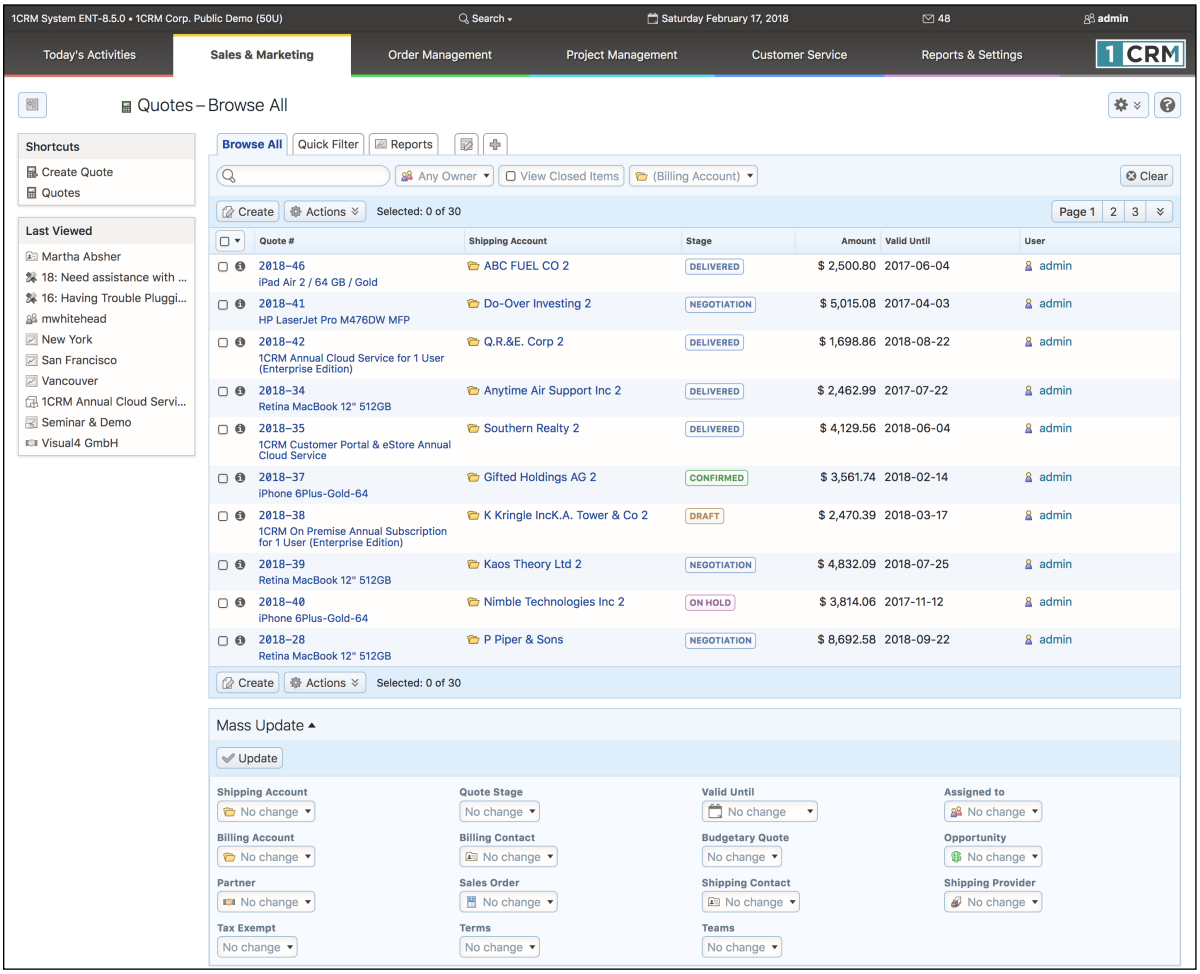


Figure 160: The Quotes Module

The Quotes module manages the creation of customer quotations. Quotes are created by defining a quantity to be sold for each of a number of products (or assemblies), and an account to which they are being quoted. Quotes may be managed and tracked through their life-cycle using the Quotes module. You can view a video presentation about how to create a Quote here.

Each Quote has a Stage – which may be set to Draft, Negotiation, Delivered, On Hold, Confirmed, Closed Accepted, Closed Lost, or Closed Dead. As well, a Quote has a Valid Until date, after which the prices quoted expire. Each Quote has a Contact, an Account, and an address – for both bill to and ship to. For each Quote the shipping provider, and the currency must also be selected.

The Quotes module provides a list of all or selected Quotes. Each Quote in the list has a check box at the left, and at the bottom of the screen is a Mass Update panel to update one or more field values for all selected Quotes. The Quotes list may be sorted by clicking on any column title that has the icon beside it. Clicking on a column title when it is already the highlighted sort column reverses the sort order.

The Quotes list is paginated if it contains more items than may be listed on the display, and controls are provided to go to the start or end of the list, or step to the next or previous page. Clicking on the subject for any Quote in the list displays the detail information for that Quote. Clicking on the account name for a Quote links to the detailed information for that Account. The navigation shortcuts provided help you create a new Quote, or switch back to the Quotes list view.

6.1.1 Creating a Quote

You start the creation of a new Quote by setting the Quote Subject, and then the Account - which in turn sets the *Bill To* and *Ship To* addresses, the default currency, the default terms, tax info, and a few other values, based on settings from that Account record. Then select a Contact at that Account.

Note: When you create new Accounts, you should define the information on the *Sales Information* panel of the Account - the *Sales Credit Limit*, *Default Terms*, *Default Discount*, *Shipping Provider* and *Tax Information*. In the main panel for the Account, you should also set the *Currency* plus the checkbox if the Account is *Tax Exempt*. By setting these values when you first define the Account, in future when you prepare Quotes or Invoices for this Account, the defaults are automatically set - preventing errors and saving you time.

6.1.2 Grouped Items, Discounts, Taxes, Shipping

By now you may have noticed that each Quote consists of one or more product Groups, and each product Group can have one or more products in it. Each Group has a name, and a stage (same options as the Quote itself). For each Group, one or more Discounts may be selected from those defined in the Discounts module, and as well a shipping charge (which may be taxable or not) may be specified at the Group level of the Quote.

Now let's carry on making your first Quote. Enter the Group name for the first Group of items, and then set the Group Type to *Products*, *Support* or *Services* (the default is *Products*, which is the option you will most commonly want).

- If your Group Type is set to *Products*, you can click on ✚ ***add product***, ✚ ***add assembly***, ✚ ***multiple products***, or ✚ ***add comment*** to add the type of line item desired. This type of Group is primarily used to add Products from the Product Catalog.
- When Group Type is set to *Support*, the system will allow you to add those same three types of line items, but also *Supported Products* and *Supported Assemblies*. This type of group is useful for quoting the prices of annual support for items in the Product Catalog (i.e. items yet to be sold to the client), or Supported Products or Assemblies (i.e. Products or Assemblies which have already been sold to the client, and now are coming up for a renewal of support)
- When Group Type is set to *Services*, the system will only allow you to add line items that are *Booking Categories*, or *Comments*. This option is useful for quoting services that are priced by the hour. (Make sure you define Booking Categories that cover all the types of services you deliver to clients.)

Next, set the pricing model for the Group to *Catalog Prices*, *Profit Margin*, *Markup over Cost*, *Discount from List*, *Same as List* or *Custom Prices* (they may not all be available to you, depending on what Quotes pricing options the Administrator has allowed you). Your Administrator has an option on the Company Information page to set a default for this pricing model.

Now you can add line items to your Quote, within the first Group you have established. Your choices are as follows:

1. The most common action is to add a Product, which you can do a few different ways. First, just click on the ✚ ***add product*** link. Then you can simply type in the beginning of a product name, in which case a dropdown list shows a list of possible options. Alternatively, after clicking on the ✚ ***add product*** link you can then click on the Lookup button at the right-hand end of the *Product or Assembly* field. This brings up a Product Catalog dialog box for you to look up an item and search by name, category or type, or part number. You can select a product by clicking on its name - this will close the dialog box and add that product to the Quote. Whenever a Product is added as a line item on your Quote, the product name, manufacturer's part number, tax code, and cost, list and unit prices are shown.

   Note: When typing in a product name on the main Quote form, if you have the check box option labelled *User Can Enter Products Not Present In Catalog* selected on your My Account page, you will also see *Custom Entry: <your text>* as the last entry on the dropdown list of Product options. If you choose this option, you will be able to enter the product name, manufacturer's part number, tax code, and cost, list and unit prices for a custom or ad hoc product to be added to your Quote. This product is only added to the current Quote, and is not added to the Product Catalog.

   Note: If a Product Catalog item is added to a Support type Group rather than a normal Product type Group, the Unit Support Cost and Unit Support Price are used rather than the Cost and Selling Price, as you are selling annual support for the item, not the item itself.

2. Much the same process as the above applies when an Assembly is added by clicking on the ✚ ***add assembly*** link, but additional indented lines are added to show the components of the Assembly.

3. If you need to enter multiple products, you may click on the ✚ ***multiple products*** link. A *Select Product* dialog box now lets you select check boxes for multiple products, and then click on the *Add Selected* button to close the dialog box and add multiple products to the Quote (see Figure 161 below).

4. A comment line can be useful to add to any quote to add clarifying information for the client. As well, there is a very useful ✚ ***add comment*** option on the Order Management Settings panel of the Admin - Company Information screen, which may be set to automatically add the description of a Product or Assembly (you can choose to enable it for Products, Assemblies, or both) as a comment line after the line item is added to a Quote.

5. When adding a Supported Product to a Support type Group within a Quote, similarly to adding a (Catalog) Product to this type of Group, the Supported Product's Unit Support Cost and Unit Support Price are listed as part of the line item inserted in the Quote, as you are selling annual support for the item.

6. Much the same is true when a Supported Assembly is added to a Support type Group within a Quote, but additional indented lines are added to show the components of the Assembly.

7. When adding Booking Categories to a Services type Group within a Quote, the Billing Rate will be added as the List and Unit Prices for the new line item. The Booking Category name, plus the Location, Duration and Seniority (in the form *Billed Contract Work (Onsite / Hour / Intermediate)*) will be entered as the name of the Quote's new line item.

8. When editing a Quote, notice the control to the right of each line item (see Figure 162). If you click on this control you will see a selection of functions you can perform on the current line item: *Adjust Pricing*, *Edit Part Number*, *Edit Product Name*, and *Duplicate*. You can use *Edit Part Number* and *Edit Product Name* to change these values for an existing line item.

When you have added a few line items to your first Quote, and perhaps defined multiple item Groups of differing types, and set various tax rates and shipping charges, you can save your Quote by clicking on the *Save* button available at the top or bottom of the Quote Edit view.

The Quotes detail view shown in Figure 163 illustrates the information captured by a Quote within 1CRM – complete with Bill To and Ship To addresses and contacts, shipping provider, discounts, taxes payable, and shipping costs.

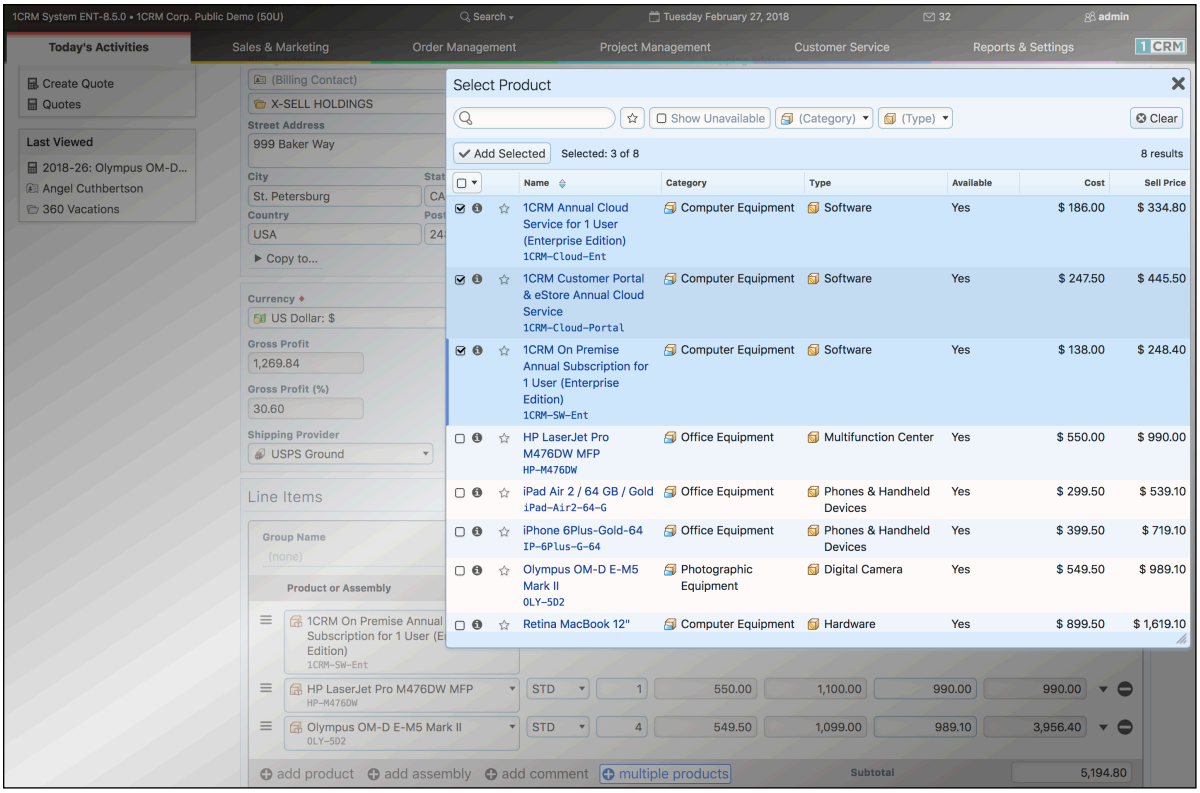


Figure 161: Adding Multiple Products to a Quote

6.1.3 Line-Item Level Discounts

As seen in Figure 163 (see *Special Promotions (10%)*), the line items on a Quote may be discounted by using Group-level discounts. But sometimes this is not convenient, if you have several individual items that need different discounts applied to them, and you do not want to put each in its own Group. For this reason, 1CRM also supports line item-level discounts (see the *Adjust Pricing* option in the dropdown seen in the Figure below). Depending on the four Quote-related permissions set in User Management for the current user (*User Can Enter Products Not Present In Catalog*, *User Can Set Prices Different From Catalog*, *User Can Set Arbitrary Discounts*, and *User Can Apply Standard Discounts*) you have a range of line item-level discount options available to you.

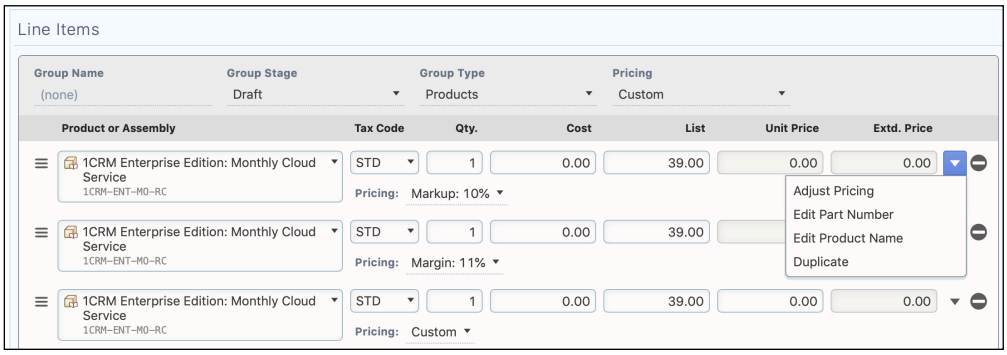


Figure 162: Line Item Level Pricing

6.1.4 Generating PDFs

An Acrobat PDF (see Figure 164) may be generated for any Quote by using the Print button. From the pop-up dialog box displayed (see Figure 165) you would normally select the *Default Quote* dropdown option in the *Use PDF Form* field. Then choose to either generate and view the PDF (by clicking the *Open as PDF* button), or to generate the PDF and immediately proceed to compose an email with the PDF as an attachment and the recipient email address set to that of the Contact on the Quote (by clicking the *Email as PDF* button).

This popup dialog box also includes a dropdown control to select which company address (if the business has multiple addresses) you'd like to use, plus two controls to select 1CRM *Notes* with PDF file attachments to merge onto the front and the back of the Quote as it is generated. These controls help you create more of a proposal-type PDF, by enclosing your Quote with standard proposal text.

Note: The *Use PDF Form* field will show *Default Proforma*, *Default Quote* and *Use Screen Layout* options as standard. The PDF Form Designer (Enterprise Edition only) may add more options.

Note: A Quote PDF may have specific notes added to it via the notes field, but may also have standard terms and conditions added to it by defining them in the Admin – Company Information panel. As well the Quote PDF features a signature block for acceptance of the quote.

Note: You can choose between different layout options for the Default Quote form (and Invoices etc..) by using the *Quote/Invoice Layout* setting on the Admin - System Settings - Company Information screen, within the Order Management panel. One option supports US standard size #10 window envelopes, for example.

Note: There are two PDF output options that may be set for a Quote. *Show Components* is an option that may be used to control the way Assemblies are shown on the PDF. The option may be set to *Details & Prices*, *Details*, or *-- None --*. With the *Details & Prices* option set, the components within an Assembly will be shown on the PDF, as well as their line item prices. The *Details* option omits the line item prices, and the *-- None --* option omits the component item information entirely from the PDF. The *Show List Prices* option simply controls if a column of list prices is displayed on the Quote PDF.

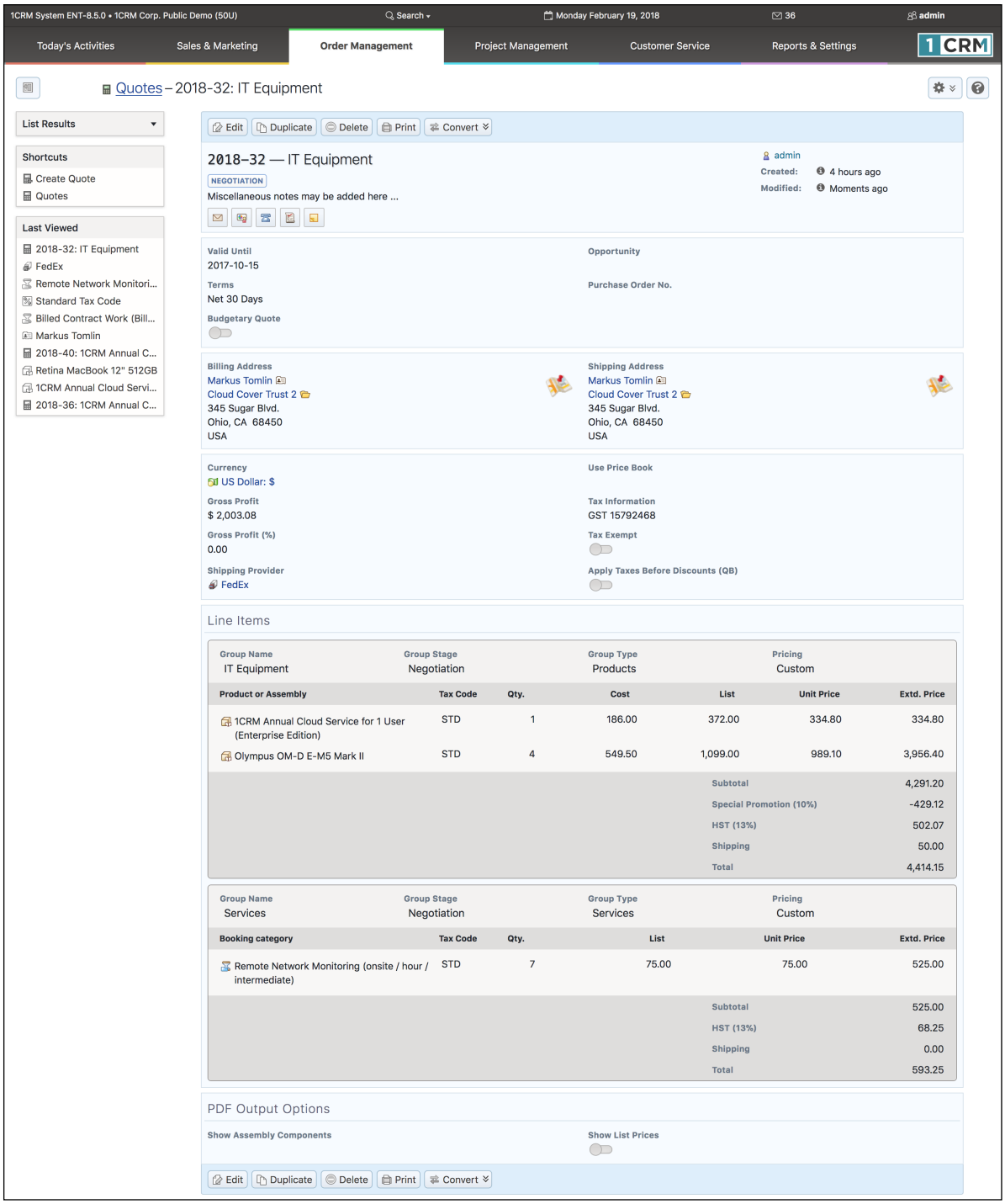
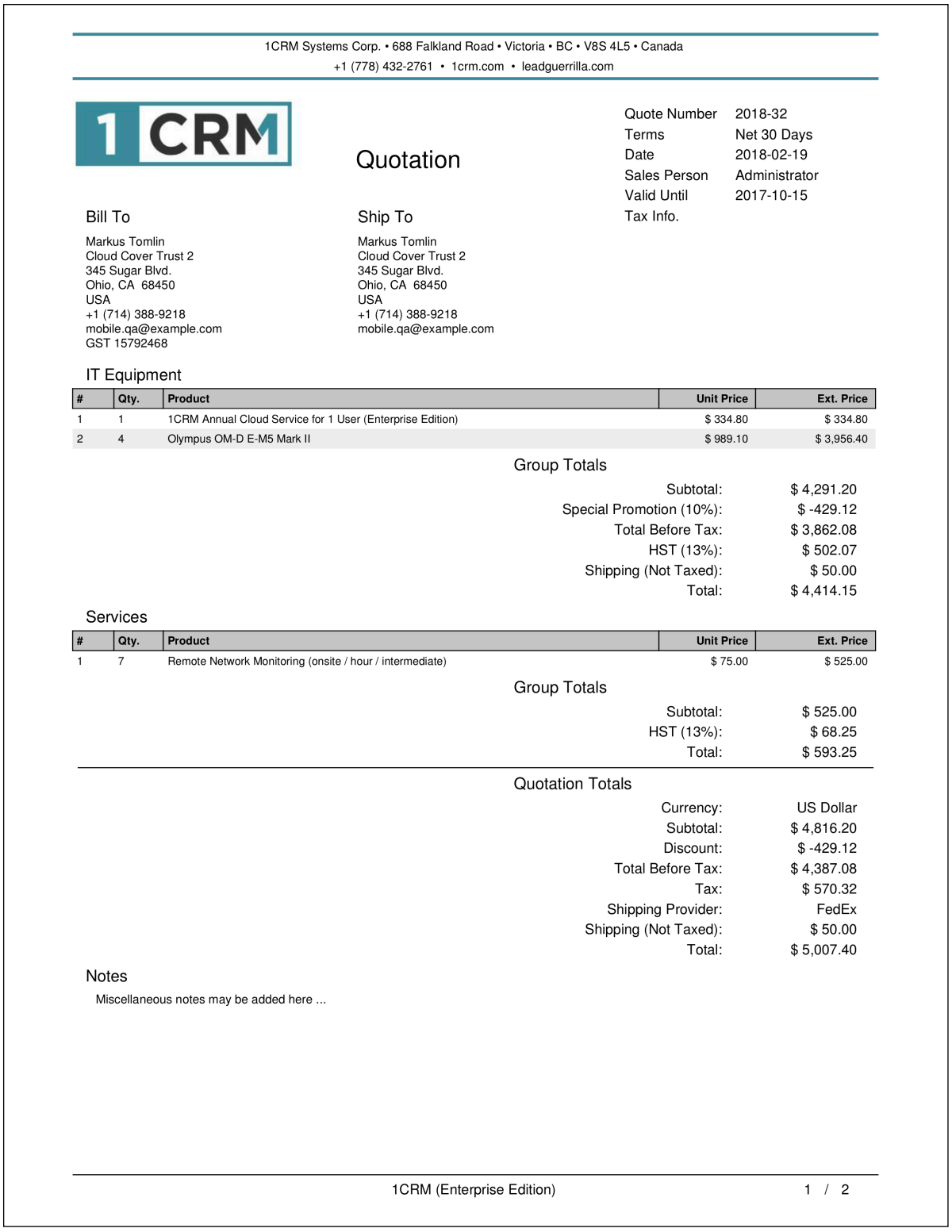


Figure 163: Quote Detail View



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+1 (778) 432-2761 • 1crm.com • leadguerrilla.com

Quotation

Quote Number	2018-32
Terms	Net 30 Days
Date	2018-02-19
Sales Person	Administrator
Valid Until	2017-10-15
Tax Info.	

Bill To

Markus Tomlin
Cloud Cover Trust 2
345 Sugar Blvd.
Ohio, CA 68450
USA
+1 (714) 388-9218
mobile.qa@example.com
GST 15792468

Ship To

Markus Tomlin
Cloud Cover Trust 2
345 Sugar Blvd.
Ohio, CA 68450
USA
+1 (714) 388-9218
mobile.qa@example.com

IT Equipment

#	Qty.	Product	Unit Price	Ext. Price
1	1	1CRM Annual Cloud Service for 1 User (Enterprise Edition)	$ 334.80	$ 334.80
2	4	Olympus OM-D E-M5 Mark II	$ 989.10	$ 3,956.40

Group Totals

Subtotal:	$ 4,291.20
Special Promotion (10%):	$ -429.12
Total Before Tax:	$ 3,862.08
HST (13%):	$ 502.07
Shipping (Not Taxed):	$ 50.00
Total:	$ 4,414.15

Services

#	Qty.	Product	Unit Price	Ext. Price
1	7	Remote Network Monitoring (onsite / hour / intermediate)	$ 75.00	$ 525.00

Group Totals

Subtotal:	$ 525.00
HST (13%):	$ 68.25
Total:	$ 593.25

Quotation Totals

Currency:	US Dollar
Subtotal:	$ 4,816.20
Discount:	$ -429.12
Total Before Tax:	$ 4,387.08
Tax:	$ 570.32
Shipping Provider:	FedEx
Shipping (Not Taxed):	$ 50.00
Total:	$ 5,007.40

Notes

Miscellaneous notes may be added here ...

1CRM (Enterprise Edition) 1 / 2

Figure 164: The Acrobat PDF Generated for a Quote

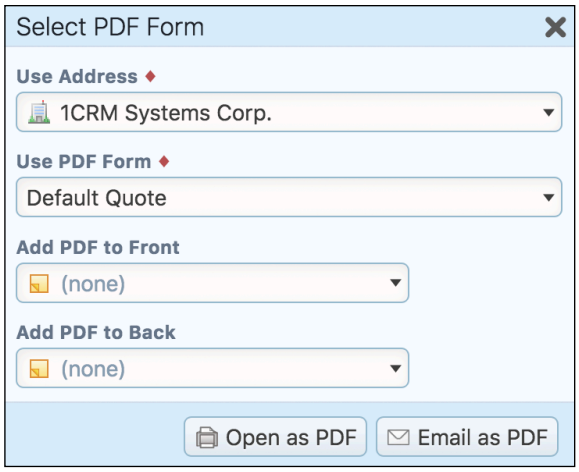


Figure 165: Preparing a Quote PDF - Options

6.1.5 Business Workflow for the Sales Process

Quotes are the first stage of the workflow for the sales process within 1CRM. Using the *Convert* button, a Quote may be converted automatically into a Sales Order, Invoice or Opportunity by selecting the appropriate option from the dropdown list presented. Line items may be added or removed, and quantities adjusted, in the process of this conversion.

Usually one Quote converts into a single Sales Order, if indeed your business uses Sales Orders. One Sales Order can translate into a single Invoice, or into multiple Invoices - hence a Sales Order has a sub-panel on it for the related Invoices.

Once an Invoice has been created, you use the *Ship It!* button on the Invoice to record shipping the product to the customer. This also adjusts inventory levels for the warehouse location used for the shipment. Each Invoice may have one or more Shipping records related to it, as shown on the Shipping sub-panel on the Invoice detail view.

Then an incoming payment from the customer may be entered using the Payments sub-panel on the Invoice record. This will adjust the *Amount Due* on the Invoice, as well as the *Balance Receivable* in the Sales Information panel on the Account record for this client. As clients may make partial payments, there may be one or more Payment records related to each Invoice record on its Payments sub-panel. This is the life-cycle on the sales side within 1CRM.

The line items on a Quote may also be automatically created as Supported Products linked to the customer Account using the *Convert* button. If you select this option, a *Create Supported Products* Pop-Up box is displayed, as shown in Figure 166 below. The options in this pop-up box allow you to associate the newly created Supported Products with a new or existing support subcontract, or with a new or existing Project.

Also note that there is a somewhat related system-level setting which causes 1CRM to add all Products on each Invoice to the Supported Products sub-panel of the Account involved, once the Invoice is paid in full. (See the Admin - System Settings section in the *Implementation Guide*.) This setting is used if you want Accounts to have an associated Supported Products list that shows all the kinds of products that the Account has purchased.

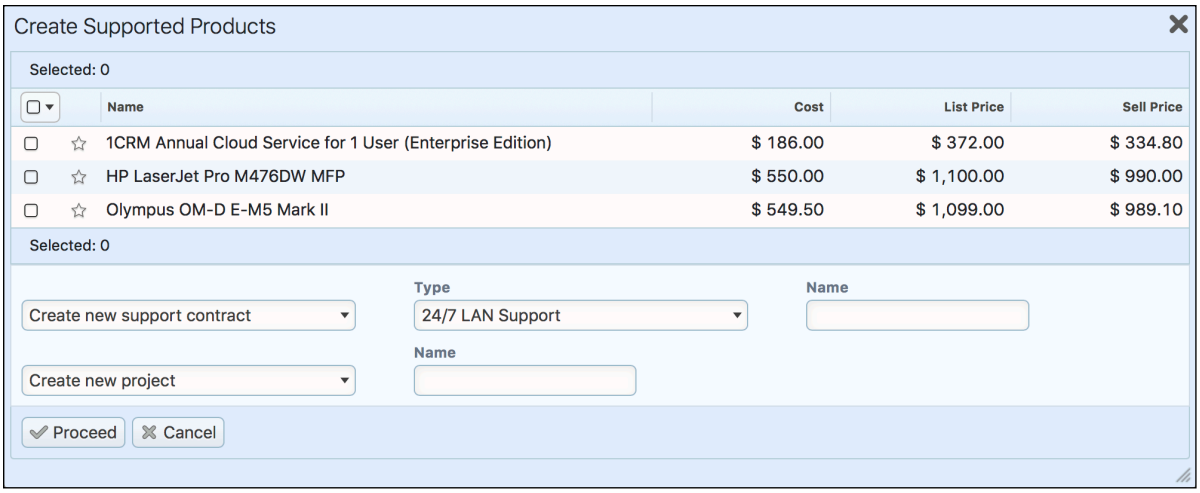


Figure 166: Create Supported Products Pop-Up Box

6.1.6 Quote Approvals

Depending on the sort of business process you wish to implement at your company, Quotes can be required to have approvals before they can be printed or emailed. The administrator can require Quote approvals by checking the *Approve Quotes* box in the Order Management Settings panel of the Admin - Company Information screen. A *Quote Approval Threshold* value may be set, and/or a *Quote Margin Threshold* percentage value. A Quote will require approval if *Approve Quotes* is enabled, and the Gross Profit percentage of the Quote is less than *Quote Margin Threshold*, or the total value of the Quote is greater than *Quote Approval Threshold*.

Note: If *Approve Quotes* is enabled, then *Quote Approval Threshold* must have an explicit value set for it. If left blank it means all quotes will need to be approved.

When *Approve Quotes* is enabled, and the user has the ability to approve Quotes (users can be given the ability to approve Quotes in Role Management), an *Approval* section of the Quote Edit view is displayed with some additional fields - a warning message *Caution: When approving a quote - please be sure you do not approve deals above your authority*, plus *Approval Status* and *Approval Issues* fields. When a new Quote is created that requires approval, until it is approved the user will only be able to convert that Quote to an Opportunity - not into a Sales Order, Invoice, or Products. The *Create PDF* button will not be available, and a new *Submit* button will allow the user to submit the Quote for approval (and will mark the status of the Quote as *Submitted)*.

Submitting a Quote for approval will also cause a notification email to be sent to a user with the ability to approve Quotes, with a link to the Quote requiring approval. That user may approve the Quote, or mark it as *Not Approved*, and add some comments in the *Approval Issues* field. Once a Quote has its status changed to *Approved*, the *Create PDF* button is available, the *Submit* button disappears, and the user is able to convert a Quote to a Sales Order, Invoice, or Products.

6.1.7 Exchange Rates

For businesses that operate in multiple currencies, 1CRM has many features that make your life easier while tracking this potentially complex aspect of doing business. A key tool for managing multiple currencies is the currency dropdown selection fields within 1CRM. On a Quote for example, you will find the currency dropdown is editable when the line items of the Quote are editable (see the Figure below, left side dropdown illustration). If the Quote currency is not the system default currency, you can click on the ⓘ icon to see the right side Info box illustration in the Figure below, which shows you the exchange rate for this Quote.

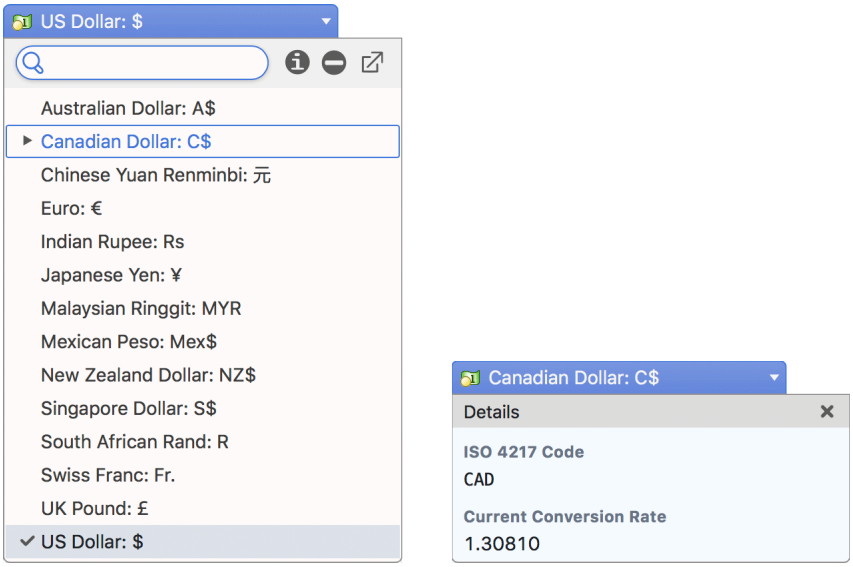


Figure 167: Exchange Rate Dropdown & Info Box

What this tells you is that the current exchange rate used for this Quote between the Quote's currency (C$ - Canadian Dollar) and the system's default currency (in this case US$) is 0.1.30810. This was the exchange rate in effect at the time the Quote was created.

Note: Remember that the system's exchange rates can be updated automatically (for example overnight each night) using the Scheduler task *Update Rates*. See the Admin section of the *Implementation Guide* for further details.

Note: If your organization wishes to allow users to alter the exchange rate to be used on Quotes, Invoices etc … then your system administrator can simply use the Layout Editor to add the *Exchange Rate* field into the screen layout for each module where it is desired.

Note: If you prepare a Quote in a currency other than your base currency, but then time passes and the Quote expires and has an outdated exchange rate - what should you do when your client gets back in touch and wants an updated Quote? The answer is to either manually update the exchange rate if it has been added to your screen layouts, or better yet make a duplicate of the Quote and it will automatically be updated to use the current rate of exchange.

6.1.8 Tax Rates and Tax Codes

Tax Rates to be used in the Quotes and Invoices modules are defined in the Admin area. For each new Tax Rate defined, the Tax Name, Rate (enter 7, for example, if the rate of tax is 7%), and Status (Active or Inactive) must be entered. Taxes may be defined as a Compounding Tax - one that is applied on the base amount as well as on any other taxes. Fortunately, most taxes are not compounding.

Tax Codes are also defined in the Admin area, and they are used to define the tax class of an item. Default Tax Codes are set for items in the Product Catalog, so that when new line items are added to a Quote or Invoice, they default to the Tax Code set in the Catalog.

Note: If you are preparing a Quote or Invoice for an Account for which a default Tax Code has been set, new line items have their Tax Code set to the Account default, not the Tax Code set on the product in the Catalog, unless the product has been set to Tax Exempt in the Catalog.

For each new Tax Code defined in Admin, the *Tax Code* itself, a *Descriptive Name* of the Tax Code, *Order* (order within the dropdown list), and *Status* (Active or Inactive) must be entered. You can also add a *Description* if desired.

Then you must relate one or more Tax Rates to the Tax Code (watch out – many users forget to do this!). What you are creating is a Tax Code that says any products with this Tax Code will have the following Tax Rates applied to them – for example, federal taxes, state/provincial taxes, and even municipal taxes where they apply.

As an example, if Federal and State Tax Rates are defined, and a Tax Code is defined called *Both* that includes both of these Tax Rates, then if a line item on a Quote is marked with the Tax Code *Both*, then both Federal and State taxes will be added to the Quote for that item.

Creating Tax Rates:

In Admin, select the *Tax Rates* option within the *Quotes & Invoices* section of the main Administration screen. On the screen listing any existing Tax Rates, there is a *Create* button for the creation of new Tax Rates. Enter the Tax Name, the Rate, Status, and finally Compounding if needed. Then click on *Save*. Repeat the process if you have more Tax Rates you wish to add.

Now we have defined our Tax Rates, we can go on to create Tax Codes.

Creating Tax Codes:

In Admin, select the *Tax Codes* option within the *Quotes & Invoices* section of the screen. Within the shortcuts area of the screen, select the shortcut for *Create Tax Code*, or use the *Create* button.

Enter a Name for the Tax Code (e.g. *0% tax*), and a Descriptive Name (e.g. *Out Of State Taxes*). Set the Status to *Active* or *Inactive*. Enter a long text Description if needed, and then enter the Order (order within the dropdown list). Tax Calculation Method defaults to *Apply Tax List* - and normally you should leave it like that. Finally, click on *Save*.

Now select the shortcut for *Tax Codes*, to see the list of all Tax Codes. Select the Tax Code with which you want to associate one or more Tax Rates, by clicking on the name of the Tax Code.

On the resulting screen, in the *Tax Rates* sub-panel, click on the *Add Existing* button to add Tax Rates to the definition of this Tax Code. In the pop up *Tax Rates* dialog box choose one or more desired Tax Rates, and then click on *Add Selected*. This will add those Tax Rates to the Tax Rates sub-panel for that Tax Code, creating the desired association between the Tax Code and the Tax Rate.

6.2 The Sales Orders Module

Note: Read the section on the Quotes module before you read this section!

Figure 168 shows the 1CRM screen with the Sales Orders Module selected.

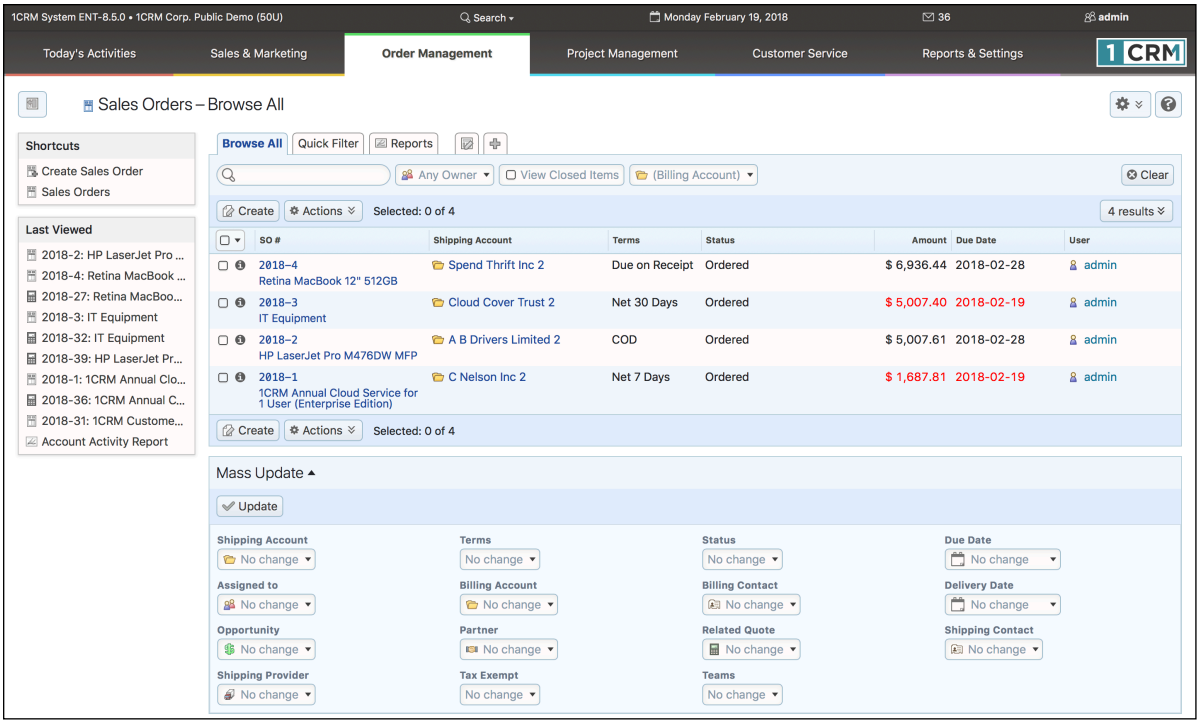


Figure 168: The Sales Orders Module

Sales Orders are a common intermediate step between a Quote and an Invoice. While not all businesses use them, and may proceed directly from a Quote to an Invoice, many businesses do use them – and typically operate an 'Order Desk' that is in charge of them. Sales Orders are often used in businesses that regularly part-ship orders, and need to track and confirm that each order processed is shipped in its entirety.

As part of the process of part-shipping an order, a packing slip is usually generated and enclosed with a partial shipment – indicating what quantities of which items were shipped, and not showing the costs of the items shipped. While the Sales Order module itself has the ability to print a PDF of a Sales Order Confirmation, you should prepare a Packing Slip (with no prices shown) using the Shipping module, after preparing an Invoice for the partial shipment. (***Note:*** You can create an Invoice from a Sales Order by clicking on the *Convert* button and then selecting the Invoice option.)

Sales Orders are created in a manner very similar to quotes, by defining a quantity for each of a number of products (or assemblies, which are complex products defined from a set of component products), and an account that is buying them. Sales Orders may also be created by converting a Quote into a Sales Order.

The Sales Orders module manages and tracks Sales Orders through their life-cycle. Each Sales Order has terms defined for it – selected from a standard set of terms (COD, Due On Receipt, Net 7 Days, Net 15 Days, Net 30 Days, Net 45 Days, Net 60 Days). Each Sales Order has a contact, an account, and an address – for both bill to and ship to. For each Sales Order the shipping provider, and the currency must also be selected.

Each Sales Order has a stage - which may be set to *Ordered*, *In Manufacturing*, *Partially Shipped & Invoiced*, and *Closed – Shipped & Invoiced*. Each Sales Order consists of one or more product groupings, and each product group may have one or more products (or assemblies) in it. For each grouping, the applicable tax rate (or rates) for taxable items may be selected. One or more Discounts may also be selected from those defined in Admin, and as well a shipping charge may be specified at the group level of the Sales Order.

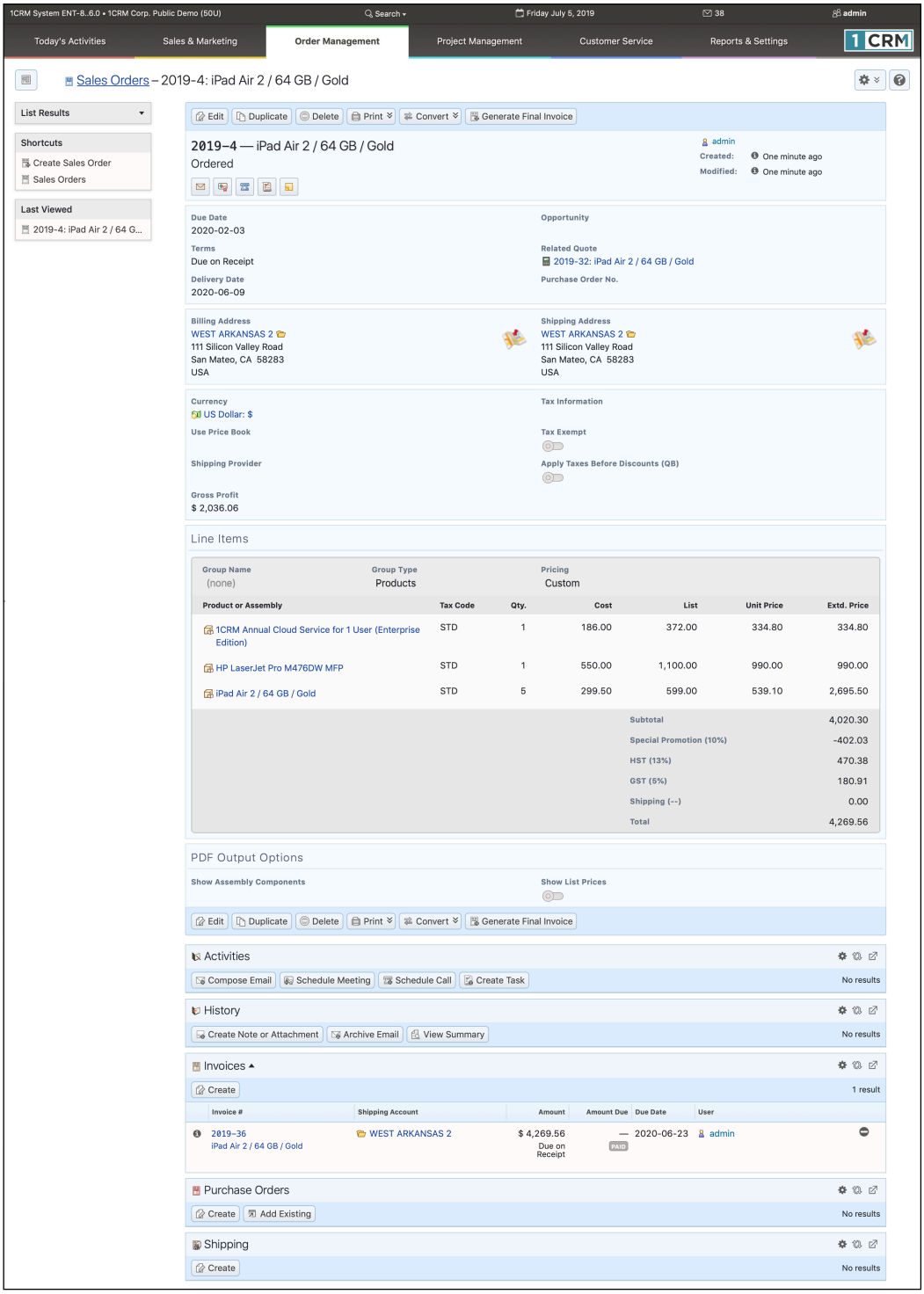


Figure 169: Sales Order Detail View

On entry, the Sales Orders module provides a list of all or selected Sales Orders, with any overdue Sales Orders highlighted (see Figure 168). Each Sales Order in the list has a check box at the left, and at the bottom of the screen is a facility to update one or more field values for all selected Sales Orders. The Sales Order list may be sorted by clicking on any column title that has the ⇕ icon beside it. Clicking on a column title when it is already the highlighted sort column reverses the sort order.

The Sales Orders list is paginated if it contains more items than may be listed on the display, and controls are provided to go to the start or end of the list, or step to the next or previous page. Clicking on the subject for any Sales Order in the list displays the detail information for that Sales Order. Clicking on the account name for a Sales Order links to the detailed information for that Account.

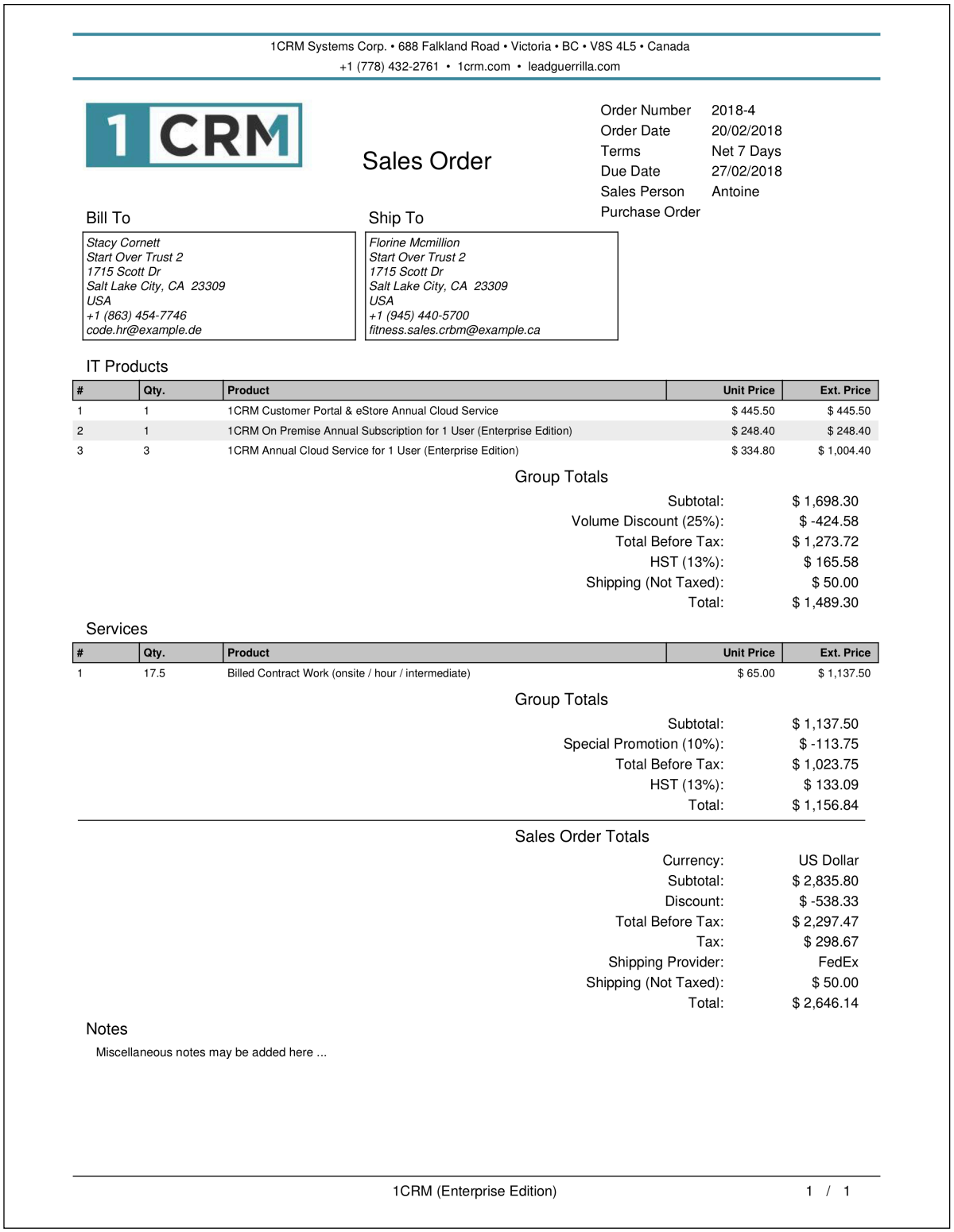
The navigation shortcuts provided help you create a new Sales Order, or switch back to the Sales Orders list view.

The Sales Order detail view shown in Figure 169 above illustrates the information captured by a Sales Order within 1CRM – complete with Bill To and Ship To addresses and contacts, shipping provider, taxes payable, discounts and shipping costs.

An Acrobat PDF may be generated for any Sales Order – using the Print button and selecting the *Sales Order Confirmation* option. From the pop-up dialog box displayed (similar to Figure 165) you may then choose to either generate and view the PDF (by clicking the *Open as PDF* button), or to generate the PDF and immediately proceed to compose an email with the PDF as an attachment and the recipient email address set to that of the Contact on the Sales Order (by clicking the *Email as PDF* button).

This popup dialog box also includes dropdown controls to select which company address (if the business has multiple addresses), and which print layout template to use when generating the PDF.

Also note that for ease in preparing Purchase Orders for items on a Sales Order, you may convert a Sales Order into a Purchase Order by clicking on the *Convert* button and selecting the *Create Purchase Order* option.



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+1 (778) 432-2761 • 1crm.com • leadguerrilla.com

Sales Order

Order Number	2018-4
Order Date	20/02/2018
Terms	Net 7 Days
Due Date	27/02/2018
Sales Person	Antoine
Purchase Order	

Bill To

Stacy Cornett
Start Over Trust 2
1715 Scott Dr
Salt Lake City, CA 23309
USA
+1 (863) 454-7746
code.hr@example.de

Ship To

Florine Mcmillion
Start Over Trust 2
1715 Scott Dr
Salt Lake City, CA 23309
USA
+1 (945) 440-5700
fitness.sales.crbm@example.ca

IT Products

#	Qty.	Product	Unit Price	Ext. Price
1	1	1CRM Customer Portal & eStore Annual Cloud Service	$ 445.50	$ 445.50
2	1	1CRM On Premise Annual Subscription for 1 User (Enterprise Edition)	$ 248.40	$ 248.40
3	3	1CRM Annual Cloud Service for 1 User (Enterprise Edition)	$ 334.80	$ 1,004.40

Group Totals

Subtotal:	$ 1,698.30
Volume Discount (25%):	$ -424.58
Total Before Tax:	$ 1,273.72
HST (13%):	$ 165.58
Shipping (Not Taxed):	$ 50.00
Total:	$ 1,489.30

Services

#	Qty.	Product	Unit Price	Ext. Price
1	17.5	Billed Contract Work (onsite / hour / intermediate)	$ 65.00	$ 1,137.50

Group Totals

Subtotal:	$ 1,137.50
Special Promotion (10%):	$ -113.75
Total Before Tax:	$ 1,023.75
HST (13%):	$ 133.09
Total:	$ 1,156.84

Sales Order Totals

Currency:	US Dollar
Subtotal:	$ 2,835.80
Discount:	$ -538.33
Total Before Tax:	$ 2,297.47
Tax:	$ 298.67
Shipping Provider:	FedEx
Shipping (Not Taxed):	$ 50.00
Total:	$ 2,646.14

Notes

Miscellaneous notes may be added here ...

1CRM (Enterprise Edition) 1 / 1

Figure 170: The Acrobat PDF Generated for a Sales Order

6.2.1 Milestone Billing

One of the main reasons for the existence of Sales Orders is to cover situations where an order is not delivered all at once. It becomes the job of someone at your company (the Sales Order Desk) to track the progress of these orders, make sure deliveries go as expected by the client, and that in the end the Sales Order is full delivered and fully invoiced.

Usually the delivery is not made all at one time because your firm has to do some work to complete the delivery - either manufacturing, processing or professional services. In all of these cases it is common to take an initial deposit against the Sales Order - usually because your firm makes financial commitments that require some matching commitment from the client.

In addition to an initial deposit, it is also common to take one or more interim payments as the delivery process reaches intermediate goals you have agreed with the client. The initial deposit, and these interim payments are often collectively referred to as Milestone payments. And 1CRM includes an easy process that allows you to do Milestone Billing. In bullet points, it looks like this:

- Create your Sales Order (perhaps by converting your Quote).
- Create an Invoice linked to this Sales Order for the initial deposit (sometimes called Milestone 0).
- Create any further Milestone Invoices linked to this Sales Order, as agreed with the client, as you complete delivery.
- At any point in time during the delivery process, you may need to prepare a statement for the client showing the current status of the Sales Order - the original total, milestone payments billed, and what remains.
- Create the final invoice which closes the Sales Order as fully invoiced.

Let's examine some of these steps in more detail.

Billing for a Deposit:

On the Sales Order detail view, scroll down to the Invoices subpanel and click on *Create*. Create a normal invoice, with just a single line item Group, and a single line item, something like this:

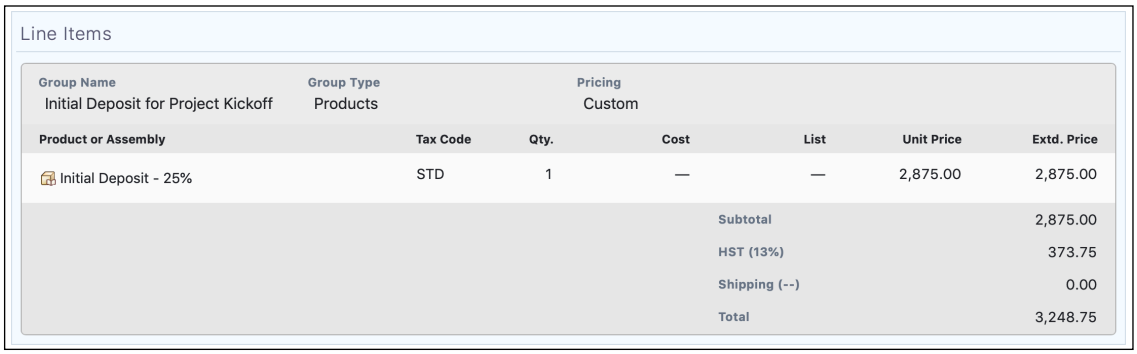


Figure 171: Billing for a Deposit

Once you save the Invoice, it will be visible on the Invoices subpanel of the Sales Order, as seen below. You can repeat this process for additional Milestones in your delivery process for this Sales Order, using a name for your line item such as "Milestone 3 Completion" or whatever makes sense in your context, and your Invoices subpanel will list any Invoices you create related to this Sales Order.

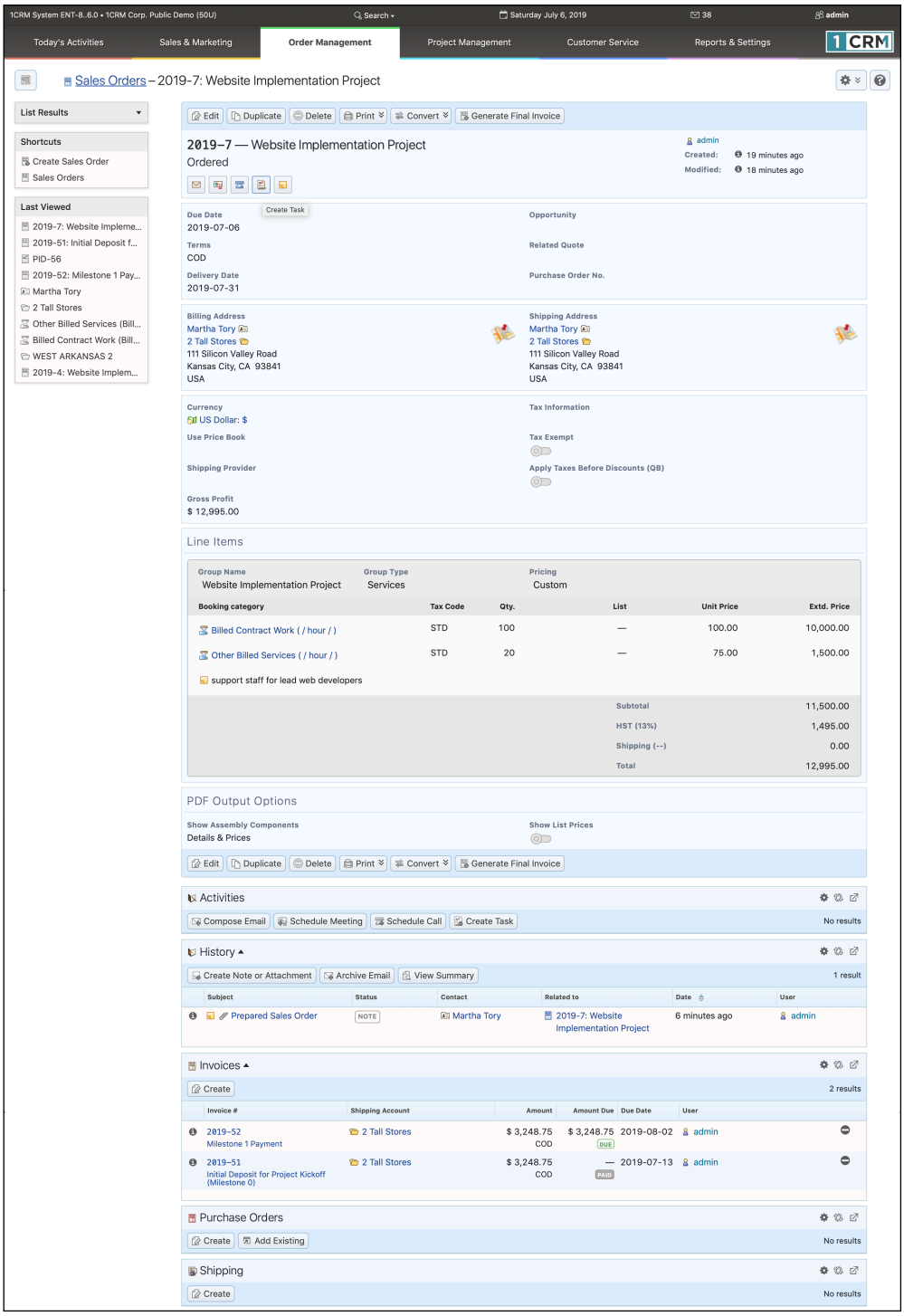


Figure 172: Billing for a Deposit & Additional Milestones

Printing a Sales Order Billing Status:

When your client asks for a status update on the progress of billing against this Sales Order, you use the Print button, and choose the PDF Form *Default Billing Status*. As usual this can generate a PDF for you to save locally, or to email directly to the client. An example of the PDF is shown below. It will show the total Sales Order value, and will list the Invoices created to date, and the balance.

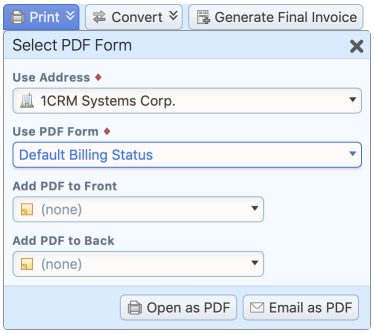
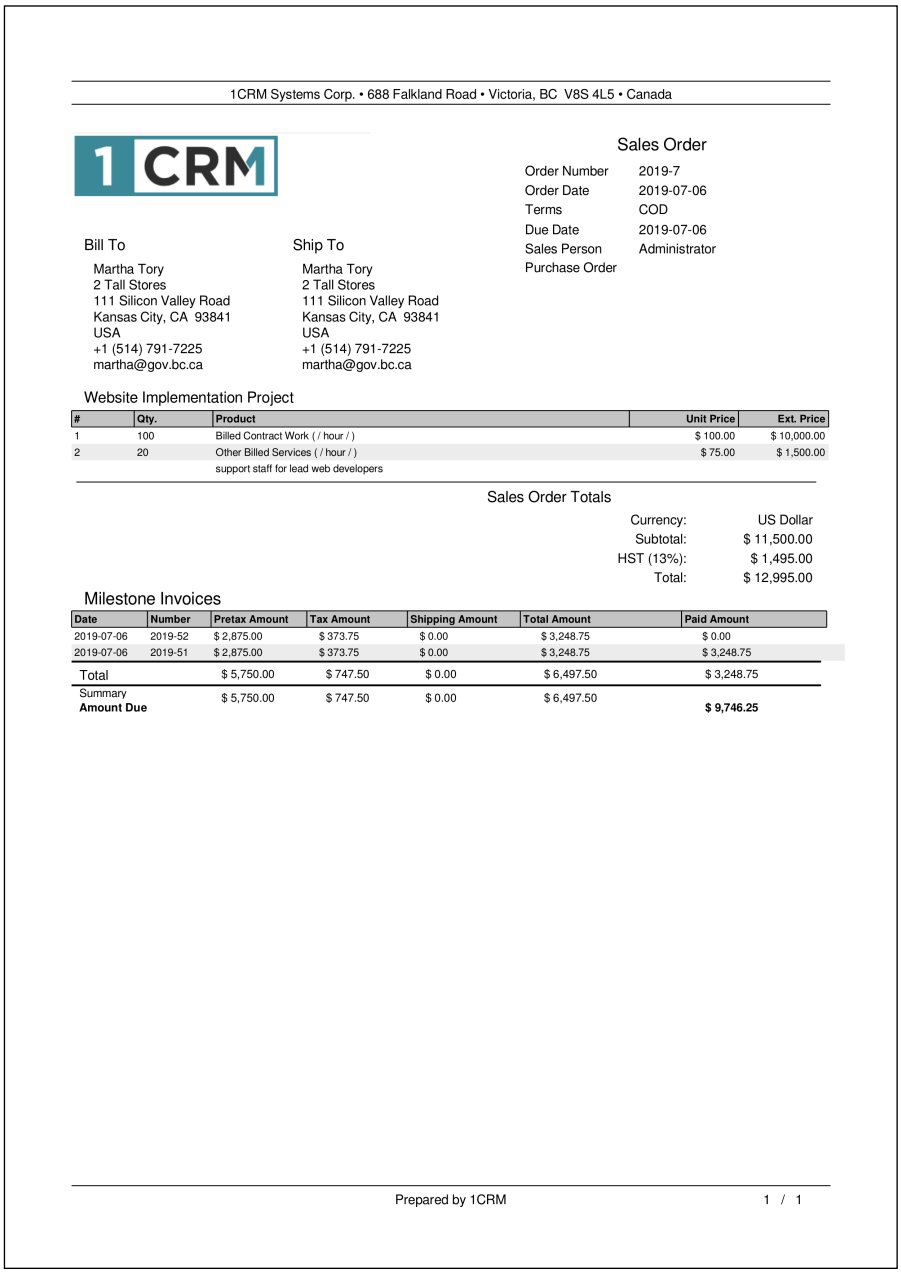


Figure 173: Printing Sales Order Billing Status



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1 CRM

Sales Order

Order Number	2019-7
Order Date	2019-07-06
Terms	COD
Due Date	2019-07-06
Sales Person	Administrator
Purchase Order	

Bill To

Martha Tory
2 Tall Stores
111 Silicon Valley Road
Kansas City, CA 93841
USA
+1 (514) 791-7225
martha@gov.bc.ca

Ship To

Martha Tory
2 Tall Stores
111 Silicon Valley Road
Kansas City, CA 93841
USA
+1 (514) 791-7225
martha@gov.bc.ca

Website Implementation Project

#	Qty.	Product	Unit Price	Ext. Price
1	100	Billed Contract Work (/ hour /)	$ 100.00	$ 10,000.00
2	20	Other Billed Services (/ hour /)	$ 75.00	$ 1,500.00
		support staff for lead web developers		

Sales Order Totals

Currency:	US Dollar
Subtotal:	$ 11,500.00
HST (13%):	$ 1,495.00
Total:	$ 12,995.00

Milestone Invoices

Date	Number	Pretax Amount	Tax Amount	Shipping Amount	Total Amount	Paid Amount
2019-07-06	2019-52	$ 2,875.00	$ 373.75	$ 0.00	$ 3,248.75	$ 0.00
2019-07-06	2019-51	$ 2,875.00	$ 373.75	$ 0.00	$ 3,248.75	$ 3,248.75
Total		$ 5,750.00	$ 747.50	$ 0.00	$ 6,497.50	$ 3,248.75
Summary **Amount Due**		$ 5,750.00	$ 747.50	$ 0.00	$ 6,497.50	**$ 9,746.25**

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Figure 174: Sales Order Billing Status PDF

Final Billing:

Once you have invoiced for your deposit and any intermediate milestones, and it is time to issue the final invoice against this Sales Order, click on the Generate Final Invoice button at the top of the Sales Order detail view (see the Sales Order screen above). This will create a final Invoice linked to the Sales Order. This Invoice will list all the line items from the original Sales Order, then will add a group of credit line items which are the Milestone invoices you have already issued against this Sales Order.

The total at the bottom of the invoice will show the total value of the Sales order, less the one or more Milestone invoices, and then the balance due. All the amounts are presented clearly, showing the amounts which are goods or services, with separate line items for the taxes involved. Here is an example of a final milestone Invoice.

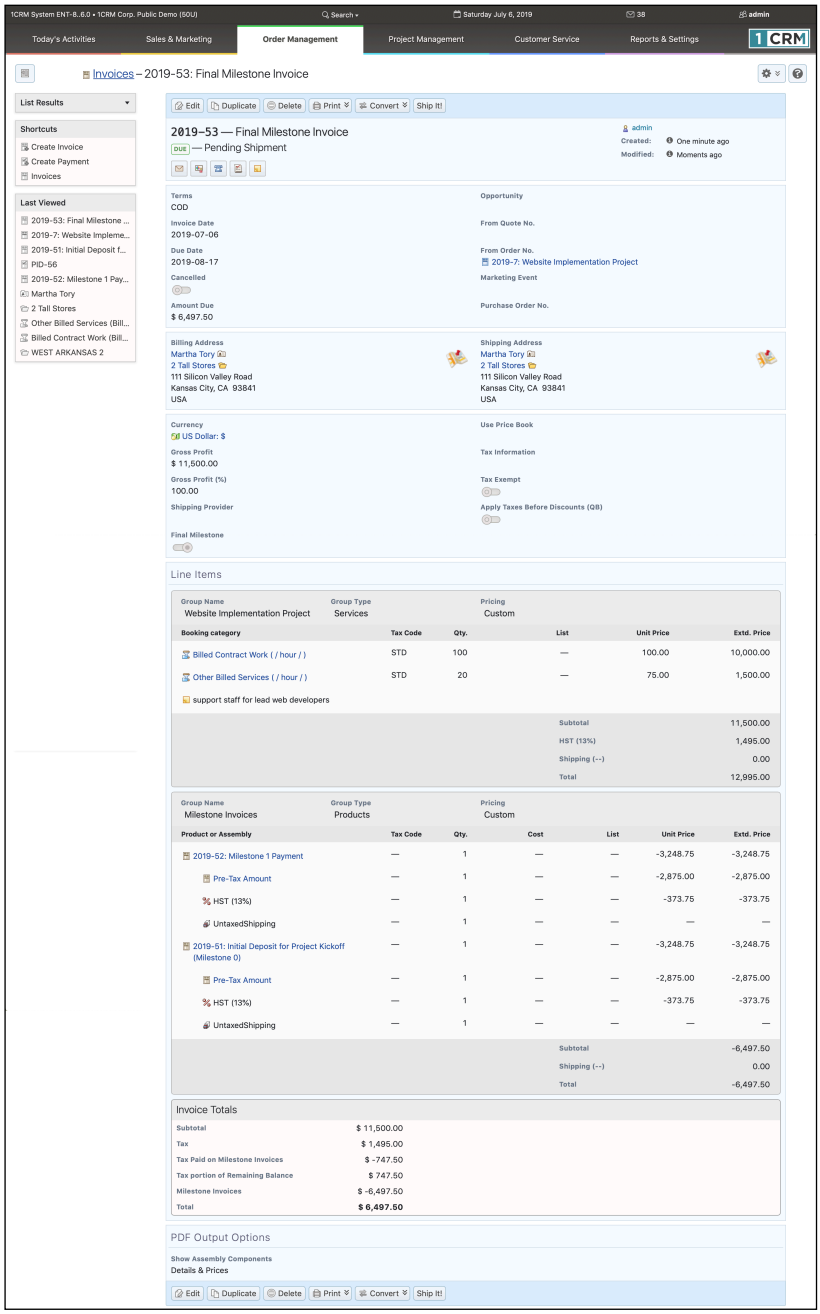

Figure 175: Final Milestone Invoice

6.3 The Invoices Module

Note: Read the section on the Quotes module before you read this section!

Figure 176 shows the 1CRM screen with the Invoices Module selected:

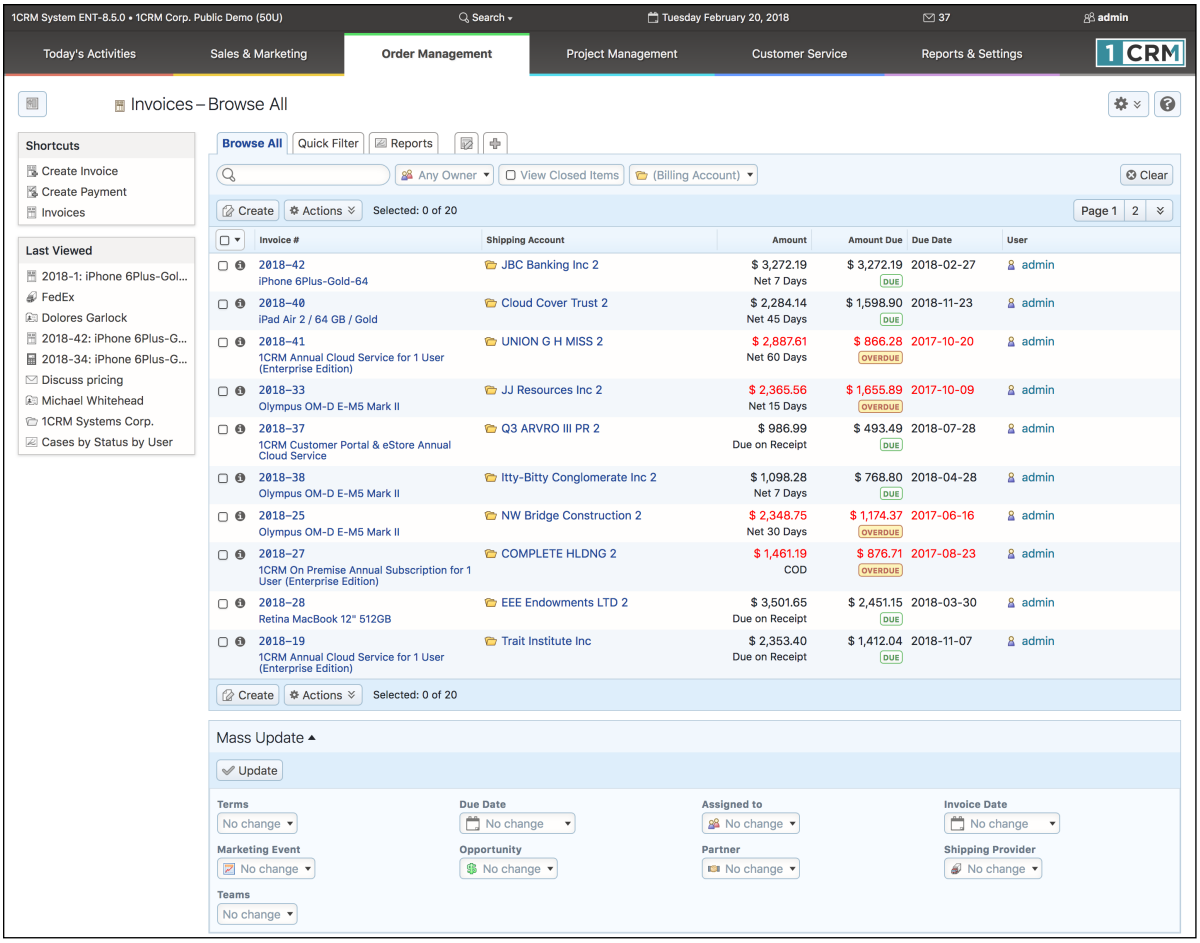

Figure 176: The Invoices Module

The Invoices module manages the preparation of customer invoices. Invoices are created in a manner very similar to quotes, by defining a quantity for each of a number of products (or assemblies, which are complex products defined from a set of component products), and an Account to which they are being invoiced. Invoices may be managed and tracked through their life-cycle using the Invoices module. Each Invoice has terms defined for it – selected from a standard set of terms (COD, Due On Receipt, Net 7 Days, Net 15 Days, Net 30 Days, Net 45 Days, Net 60 Days). Those terms, combined with the Invoice date, define what the due date is for the Invoice. Each Invoice has a Contact, an Account, and an address – for both bill to and ship to. For each Invoice the Shipping Provider, and the Currency must also be selected.

Each Invoice consists of one or more product groupings, and each product group may have one or more Products (or Assemblies) in it. For each grouping one or more Discounts may be selected from those defined in Admin, and as well a shipping charge may be specified at the group level of the invoice. Taxes applicable to the items in a group will be listed underneath the group, based on the Tax Codes of each item in the group.

On entry, the Invoices module provides a list of all or selected Invoices, with any overdue Invoices highlighted (see the Figure above). Each Invoice shows the original amount of the Invoice, as well as the current Amount Due after any Payments have been applied. Each Invoice in the list has a check box at the left, and at the bottom of the screen is a Mass Update facility to update one or more field values for all selected Invoices. The Invoices list may be sorted by clicking on any column title that has the ⬍ icon beside it. Clicking on a column title when it is already the highlighted sort column reverses the sort order.

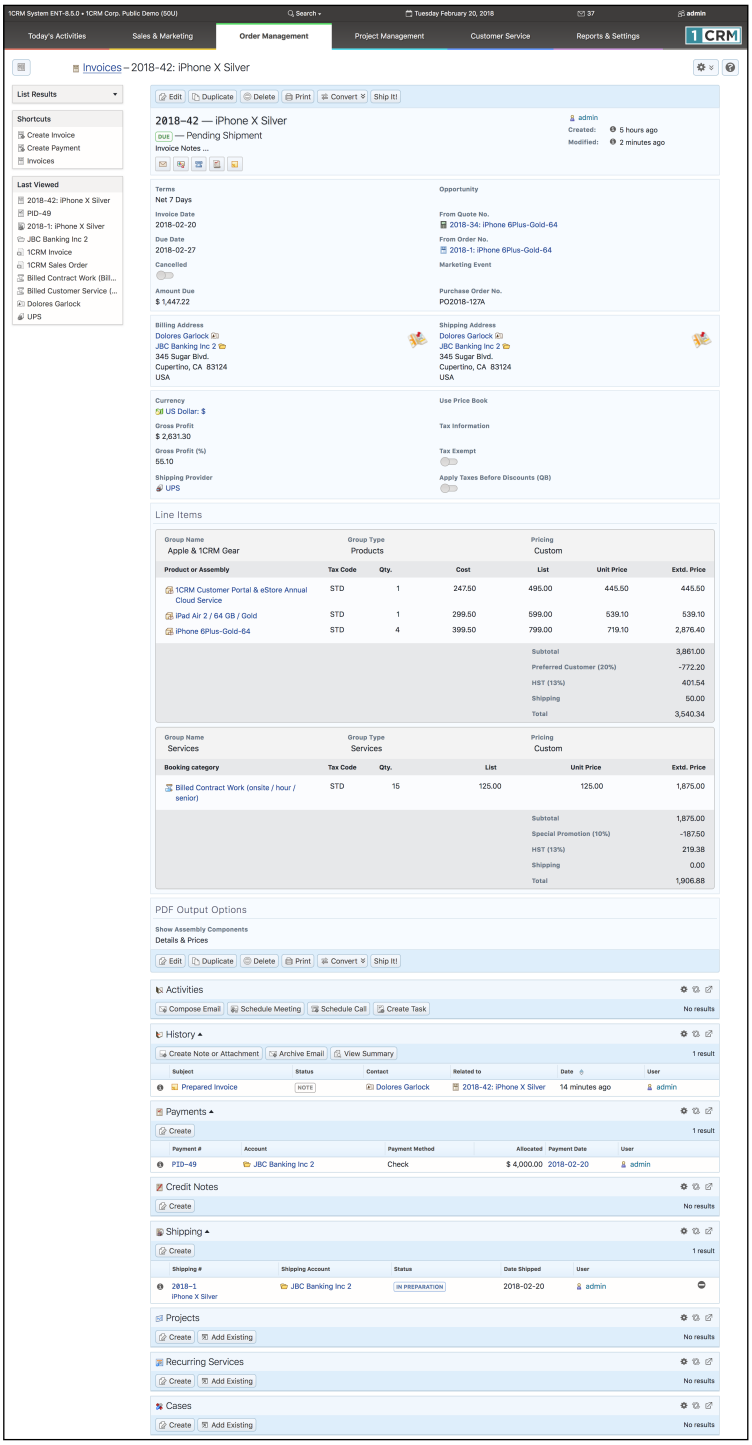

Figure 177: Invoice Detail View

The Invoices list is paginated if it contains more items than may be listed on the display, and controls are provided to go to the start or end of the list, or step to the next or previous page. Clicking on the subject for any Invoice in the list displays the detail information for that Invoice. Clicking on the Account name for an invoice links to the detailed information for that Account.

The navigation shortcuts provided help you create a new Invoice, or switch back to the Invoice list view. The Invoice detail view shown above illustrates the information captured by an Invoice within 1CRM – complete with Bill To and Ship To addresses and Contacts, Shipping Provider, taxes payable, Discounts and shipping costs. Sub-panels exist to show any Activities or History associated with the Invoice, and to show or create related Payments or Shipping records.

6.3.1 Creating a Credit Note

The Convert button has a *Create Credit Note* option which is used to credit some or all of the value of an Invoice by generating a Credit Note that is linked to it. Or you can also use the *Create* button on the Credit Notes sub-panel of an Invoice detail view.

Note: If the current Invoice has been marked as *Shipped*, then the related Credit Note should be *Received* (if any inventory items are being returned to stock via the credit note) to ensure that inventory levels are adjusted appropriately. For more information about Credit Notes, please see the section on that module.

6.3.2 Charging a Credit Card

The Charge Credit Card button is used to process a credit card payment for this Invoice, immediately. This button is only visible if you have previously configured account data for one of the supported Payment Gateways in the Company Information screen in Admin, such as Stripe or Authorize.net. Clicking on this button brings up a Credit Card Payment screen (see Figure below) with most of the information pre-filled. Add the payment amount, credit card number, expiry date month and year, plus the CVV2/CVC2/CID (for MasterCard and Visa, this is three digits to the right of the credit card number in the signature area on the back of the card; for Amex it is four digits printed on the right front of the card above the credit card number). Now enter the client first and last names and click on *Submit Transaction*.

If there is a problem with processing the transaction, a message will be displayed on the Credit Card Payment screen, otherwise that screen will close, and a success message will show on the main screen. The transaction ID will be captured in the Customer Reference field of a Payment record attached to the Invoice. ***Note:*** 1CRM does not retain credit card data.

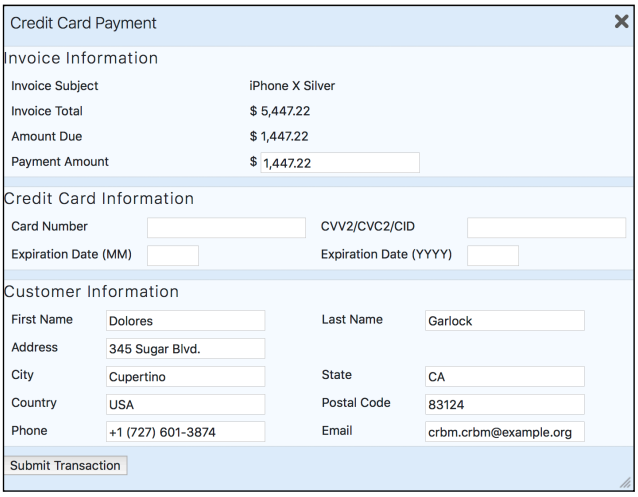

Figure 178: Credit Card Processing

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Invoice

Invoice Number	2018-42
Terms	Net 7 Days
Invoice Date	2018-02-20
Purchase Order	PO2018-127A
Due Date	2018-02-27
Tax Info.	

Bill To:

Dolores Garlock
JBC Banking Inc 2
345 Sugar Blvd.
Cupertino, CA 83124
USA
+1 (737) 493-0764
paleo90@example.edu

Ship To:

Dolores Garlock
JBC Banking Inc 2
345 Sugar Blvd.
Cupertino, CA 83124
USA
+1 (737) 493-0764
paleo90@example.edu

Apple & 1CRM Gear

#	Qty.	Product	Unit Price	Ext. Price
1	1	1CRM Customer Portal & eStore Annual Cloud Service	$ 445.50	$ 445.50
2	1	iPad Air 2 / 64 GB / Gold	$ 539.10	$ 539.10
3	4	iPhone 6Plus-Gold-64	$ 719.10	$ 2,876.40

Group Totals

Subtotal:	$ 3,861.00
Preferred Customer (20%):	$ -772.20
Total Before Tax:	$ 3,088.80
HST (13%):	$ 401.54
Shipping (Not Taxed):	$ 50.00
Total:	$ 3,540.34

Services

#	Qty.	Product	Unit Price	Ext. Price
1	15	Billed Contract Work (onsite / hour / senior)	$ 125.00	$ 1,875.00

Group Totals

Subtotal:	$ 1,875.00
Special Promotion (10%):	$ -187.50
Total Before Tax:	$ 1,687.50
HST (13%):	$ 219.38
Total:	$ 1,906.88

Invoice Totals

Currency:	US Dollar
Subtotal:	$ 5,736.00
Discount:	$ -959.70
Total Before Tax:	$ 4,776.30
Tax:	$ 620.92
Shipping Provider:	UPS
Shipping (Not Taxed):	$ 50.00
Total:	$ 5,447.22

Notes

Invoice Notes ...

All software sales are subject to the terms of the 1CRM Software License Agreement, which may be reviewed at http://1crm.com/swlicense.pdf.

1CRM (Enterprise Edition) 1 / 1

Figure 179: The Acrobat PDF Generated for an Invoice

6.3.3 Shipping Products with the Ship It! Button

The Ship It! button is used to ship the products on your Invoice. Clicking this button creates a new Shipping record, with all the groups and line items from the Invoice on it. You may choose to remove some of the line items if only part of the Invoice is being shipped. See more information in the section on the Shipping module.

6.3.4 Creating Supported Products from Line Items

The Convert button has a *Create Products* option which is used to make Supported Products from some or all of the line items in the current Invoice, and optionally associate them with a new or existing Service subcontract, and a new or existing Project. It is a very handy tool to save repeated data entry.

6.3.5 Creating an Invoice or Statement PDF

Use the Print button to *Print Details*, *Prepare Invoice*, or *Prepare Statement*. If you choose *Prepare Invoice* or *Prepare Statement*, a pop-up dialog box is displayed (similar to Figure 165). You may then choose to either generate and view the Acrobat PDF (by clicking the *Open as PDF* button), or to generate the PDF and immediately proceed to compose an email with the PDF as an attachment and the recipient email address set to that of the Contact on the Invoice (by clicking the *Email as PDF* button).

Note: An Invoice PDF may have specific notes added to it via the notes field, but may also have standard terms and conditions added to it by defining them in the Admin – Company Information panel. (See Figure 179 for an example.)

6.3.6 Applying Incoming Payments

To record a Payment that has been received, typically you would look up the Invoice involved, and click on the *Create* button on the Payments sub-panel for that Invoice, or choose the *Create Payment* option from the Convert button. A Payment edit screen will come up, pre-set with most of the information you need to record. Just set the Payment Type, and adjust the received amount and the allocation line below if only a partial payment is being processed, and then save the record.

Selecting the *Payments* module and then clicking on the layout tab for *Incoming Payments* will show a list of all or filtered incoming payments in the system, including the payment ID and date, amount and type (Cash, Check, Wire Transfer, Money Order, Bank Draft, PayPal, Western Union, Credit Note, Credit Card).

The *Create Incoming Payment* shortcut is used to enter information about a new incoming payment that has been received, and document how that payment is to be allocated against any invoices in the system for the Account from which the payment was received.

Note: On the Payment detail view you may use the Print button to *Print Details* or print a *Payment Receipt*. If you choose *Payment Receipt*, a pop-up dialog box is displayed (similar to Figure 165). You may then choose to either generate and view the PDF (by clicking the *Open as PDF* button), or to generate the PDF and immediately proceed to compose an email with the PDF as an attachment and the recipient email address set to that of the Contact on the Invoice (by clicking the *Email as PDF* button).

Note: Once a payment has been linked to an Invoice, the Invoice is Locked - preventing most aspects of the Invoice from being edited. This is to provide a level of security for your Invoice records, making the system more acceptable by accounting professionals. See more about this in section 6.3.11.

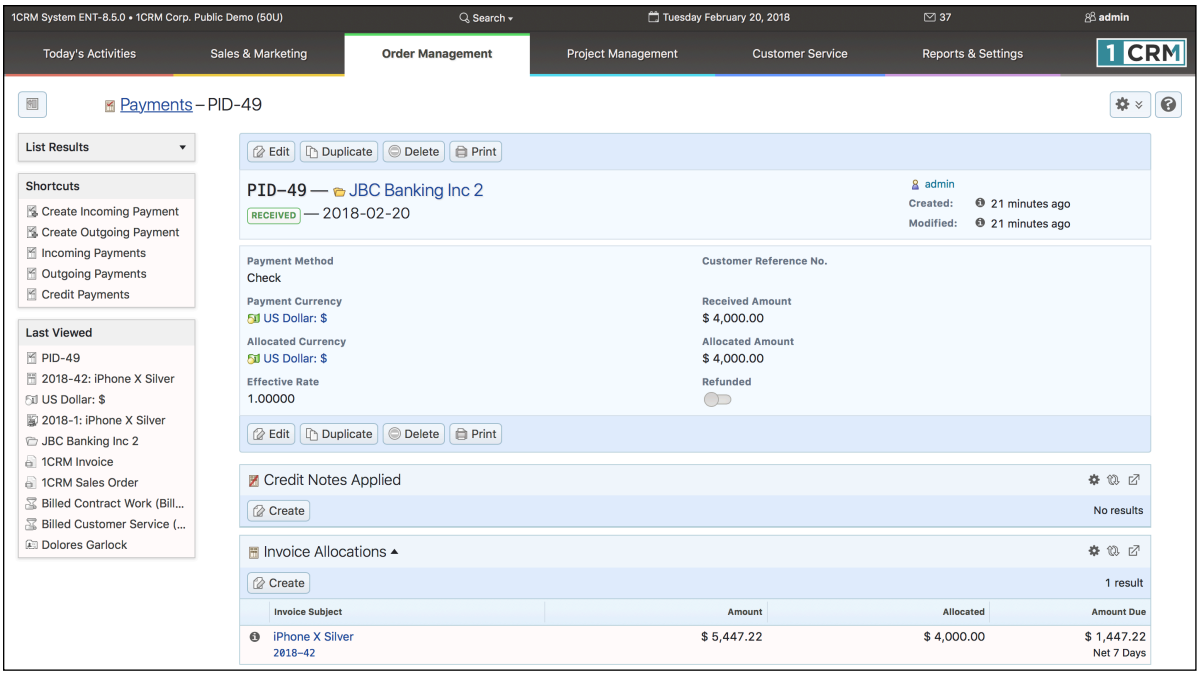


Figure 180: Payment Detail View

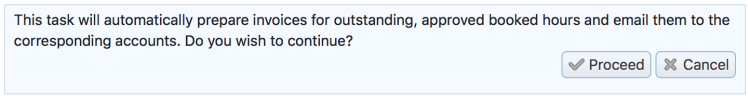
6.3.7 Invoicing for Time Booked to Projects and Cases

You may use the shortcut *Invoice Cases/Projects* in the Accounts module to automatically calculate, create and email Invoices for any hours booked to Cases or Projects. The hours must be approved, and billable, and not yet invoiced, for them to be added as line items to Invoices created using this feature. The net result of this feature is that an email will be sent to each Account that has any un-billed, yet approved and billable hours outstanding. These hours would have been booked to either Cases or Projects for these Accounts.

Before you use this function, make sure that you design an email template for the purpose of sending invoices to clients. You'll need this because this function will prompt you for a template to use for the emails that will be sent out to your client Accounts, with the PDF of the Invoice attached. Also make sure that your outbound email is configured, as email cannot be sent unless it is.

The email that clients receive will have the subject and email body set by the email template you design, and will have the generated invoice and a statement attached to it. The new invoices that are created automatically will have their invoice subject (and invoice notes field) set to the name of the company being invoiced, with the text - *Outstanding Hours* suffixed to it.

To use this function, just click on this shortcut within the Accounts module. You will receive the prompt:



Confirm by clicking on *Proceed*. You will see the screen shown below:

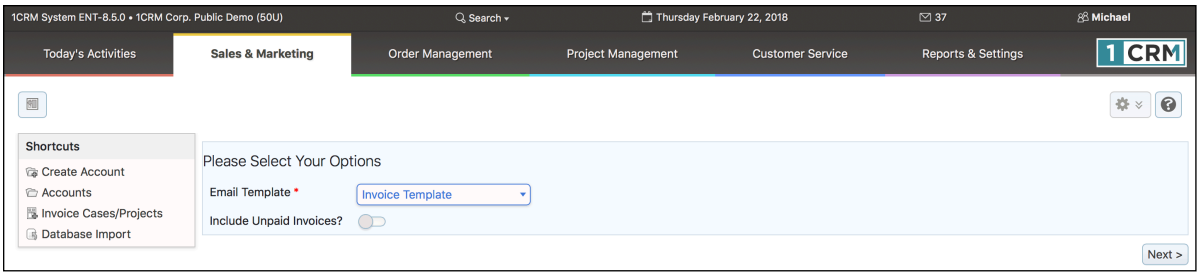


Figure 181: Invoice Cases/Projects - Step 1, Select Options

Select the template to use, and decide if you want the emails sent out to also include copies of any other open invoices, then click on *Next*.

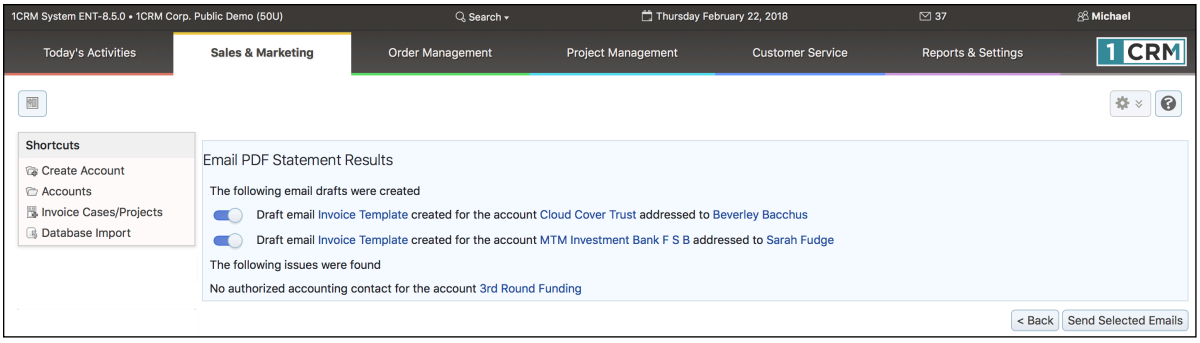


Figure 182: Invoice Cases/Projects - Step 2, Missing Accounting Contact

The system now scans for any booked hours that are billable and approved but not yet invoiced. It sorts them by Account, and generates an Invoice (with appropriate detail lines and totals) for each Account that needs to receive one. Then it checks that each of these Accounts has at least one Contact that is marked as an *Accounting Contact*. If any of the Accounts have no such contact, you will see a screen such as the one in the figure above telling you which Accounts have this issue. If you have these issues, use the links provided to correct them, then click on the *Back* button, and try the step again.

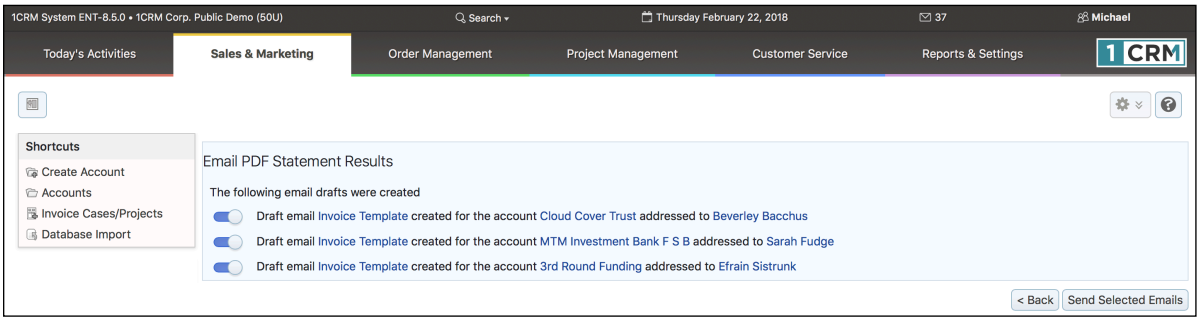


Figure 183: Invoice Cases/Projects - Step 2, Email Created

Once all your Accounts have Accounting Contacts, Step 2 will proceed to completion. You now see a screen like the figure above, which simply lists all the draft emails created. You may select which of them you want to send out and then simply click on the button Send Selected Emails. You also have links to preview any of the emails you might want to see. Note that if you use these links it is best to open them in a new tab or window so as not to lose your place in the invoicing process.

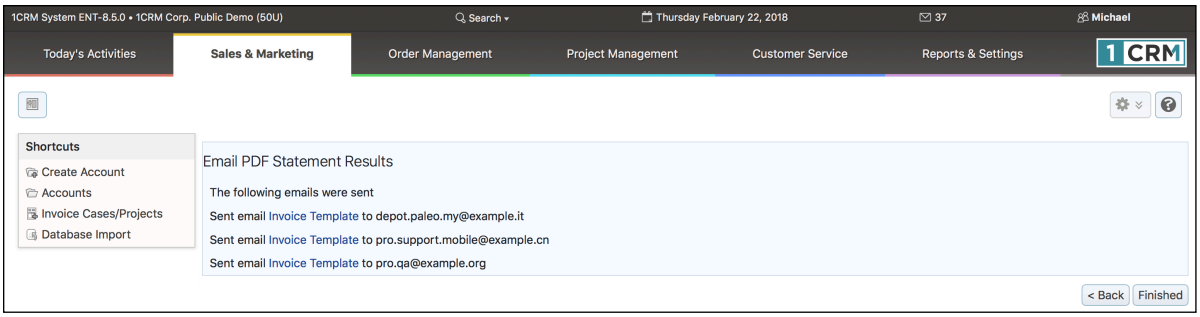


Figure 184: Invoice Cases/Projects - Step 3, Emails Sent

Lastly the selected emails are actually sent, and you see a screen like the figure above, summarizing the emails that have been sent, and the email addresses to which they were sent.

Note: If you exit the invoicing process after the invoices have been generated but before they are sent, you will not be able to re-run the process - as the hours will have been marked as invoiced, and the invoices have already been added to the system. But you will be able to view, print or email the invoices using the regular facilities available to you within 1CRM.

6.3.8 Invoicing Individual Service Cases

Sometimes it's not convenient to use the all-encompassing function above that invoices all outstanding booked hours across all your Accounts. Sometimes you just want to give a client an invoice for service. To do that, your steps are:

- Book your hours on the Case. You can do that easily using the *Booked Hours* sub-panel on any Case, with the *Create* button on that sub-panel. There is also a handy button at the top of the Case detail screen.
- Make sure your Booked Hours entries on the Case have a Status of *Approved*.
- Check in *Admin - Company Info - Customer Service Settings*, that *Auto-Add Hours to Case Invoice* is enabled.
- Click on the *Create* button of the Invoices sub-panel on the Case. A new Invoice will come up for the client involved, with any Booked Hours already on the Invoice as line items.

6.3.9 Invoicing Individual Projects

Follow much the same process as above, but for a Project instead of a Case. There is a separate setting in *Admin - Company Info - Customer Service Settings*, called *Auto-Add Hours to Project Invoice* that you need to check is enabled.

6.3.10 Paying Invoices using PayPal

Users should be aware that your system administrator is able to add a button to your Invoice PDFs (requires the PDF Form Designer - Enterprise Edition only) which your clients can click on to pay the invoice. Clients can use a credit card, and do not have to have a PayPal account.

Similarly, clients using the Customer Connection portal can see which of their invoices are outstanding, and have a button for each one to enable them to pay it using the PayPal system.

More information on these two features is available in the Implementation Guide (Company Information screen), and the Customer Connection Guide.

6.3.11 Locking Invoices for Data Integrity

If you are using 1CRM to record your invoices and received payments, then clearly this forms a key portion of your accounting records. If users of your CRM could delete Invoices or edit them, even after payments have been received against those Invoices, then clearly this would present a large opportunity for fraudulent activity.

In order to ensure that your Invoice and Payment records within the CRM represent a true history of your financial activities, 1CRM has some standard security measures in place. Many of these are related to a *Locked* checkbox you will see on your Invoices. This checkbox is not editable, and is set automatically once a Payment has been applied to an Invoice record. Once the Invoice is Locked, the Invoice data becomes largely non-editable. You can edit the Invoice and change a few values such as Notes, Shipping Account & Contact, but you may not edit any of the line items on the Invoice, nor can you edit the Invoice Terms, Billing Contact, Billing Account and Address, Invoice Date and Due Date.

Another key security measure is that the default Role for all 1CRM users is set to disable the ability to delete Invoices - so users cannot delete invoices individually or by Mass Update. Nor can you Cancel an Invoice that has any related Payments.

System Administrators are provided with an *Unlock* button at the top of the Invoice Detail View. This displays a popup which recommends against unlocking, and explains the proper accounting practices for reversing an Invoice. If the Admin chooses to ignore this recommendation, they can unlock the Invoice.

When an Invoice is unlocked in this manner, an entry is made in the Change Log for this Invoice, showing which user changed the Locked checkbox. An entry is added to the Activity Log as well.

6.4 The Credit Notes Module

Figure 185 shows the 1CRM screen with the Credit Notes Module selected:

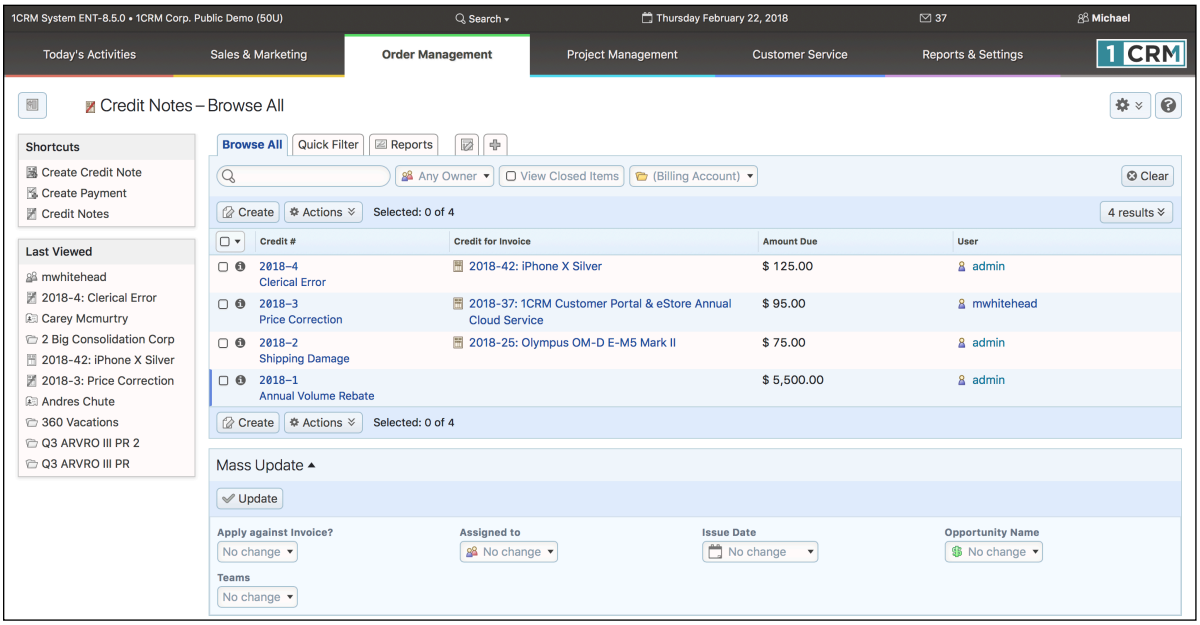


Figure 185: Credit Notes List View

1CRM has the ability to create credit notes related to specific invoices, or credit notes that are simply a general credit to an Account, not to a specific Invoice (Credit Note 2018-2 in the Figure above).

As well, 1CRM can create a credit note for an Invoice which has already been paid in full, and which will therefore require an *Outgoing Payment* to be made to the related client Account. Or 1CRM can create credit notes for Invoices which have not been fully paid, where the credit note simply reduces the *Amount Due* for that Invoice.

6.4.1 Crediting an Invoice

The Convert button on the Invoice detail view has a *Create Credit Note* option which is used to credit some or all of the value of an Invoice by generating a Credit Note that is linked to it. Or you can also use the Create button on the Credit Notes sub-panel of the Invoice detail view.

In Figure 186 you can see a Credit Note being created. When issuing a customer credit, you may be giving a full credit on certain line items (as in this example) that were not shipped in error, or which were returned. Or you may be giving a partial credit on some line items, because the customer was over-charged initially, or because the items were damaged in shipping, or some other reason.

Note: In either case, as you are applying this credit note against a particular invoice, you must check the option *Apply against Invoice*. This is **critically important**!

In our full credit example below, the items are being returned to stock, and so the credit note should show the correct quantities of the items being returned, and once the credit note has been saved, it should be *Received*, so that inventory levels are credited with the received items. The financial amounts on the credit note should reflect the total amount (as well as refunded tax) being credited back to the client based on this Invoice. In our partial credit examples above, you will still have one or

more line items on the credit note, but typically no items are returned to stock, and the credit note need not be *Received* once it has been saved.

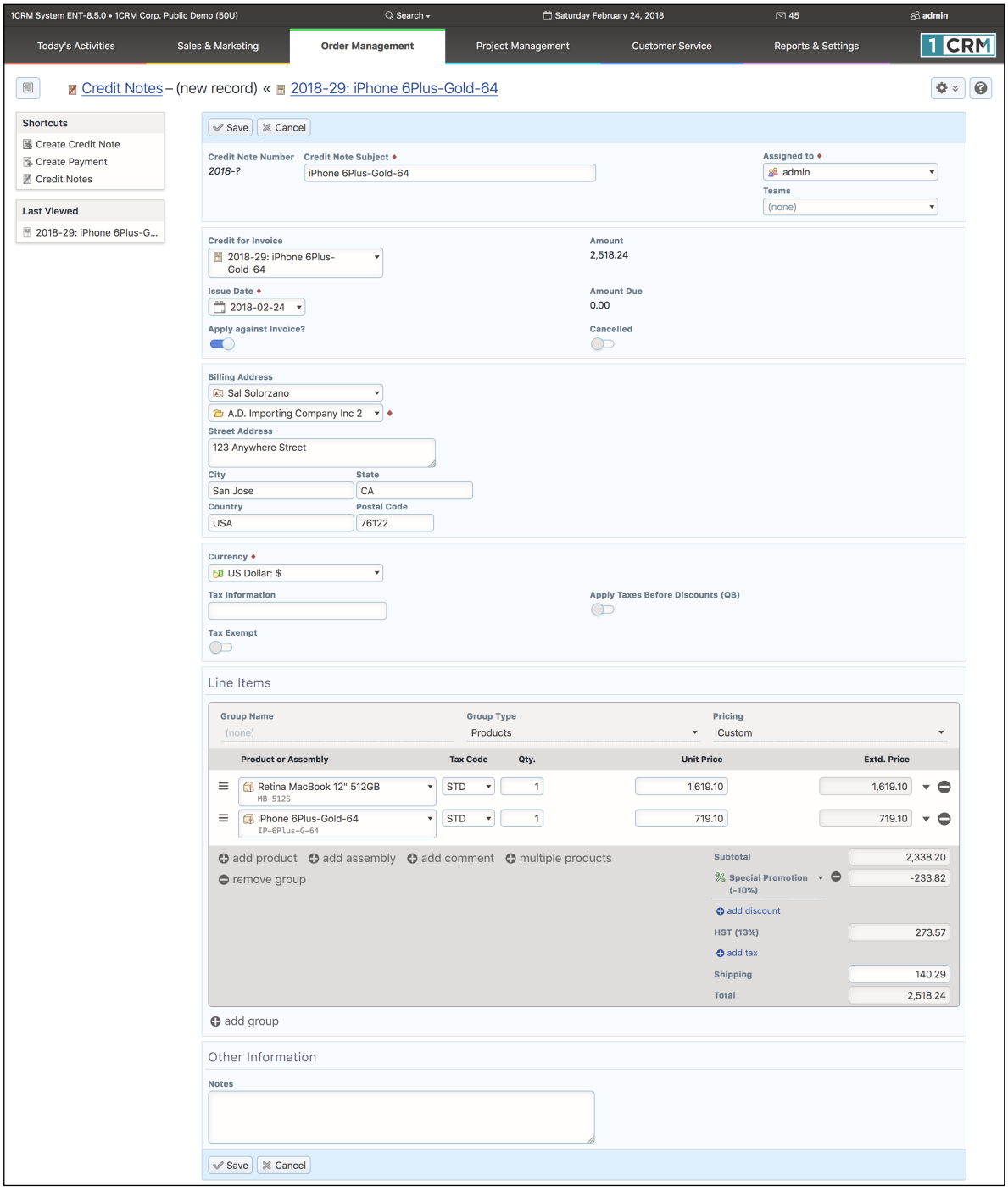


Figure 186: Credit Note Edit View

If after processing a credit note related to an Invoice, you see an *Amount Due* on the Invoice which is a negative amount, then the client has already paid more than they should, and you should create an Credit Payment for that amount to that Account, using the Create button on the Payments sub-panel of the Invoice.

6.4.2 Crediting an Account

Not surprisingly, to credit an Account rather than a specific Invoice, you start from the Account detail view rather than the detail view of a specific Invoice. Click on the Create button on the Credit Note sub-panel of the Account detail view (on the Sales Information tab). You'll see a credit note form that resembles Figure 187, and does not have a related Invoice.

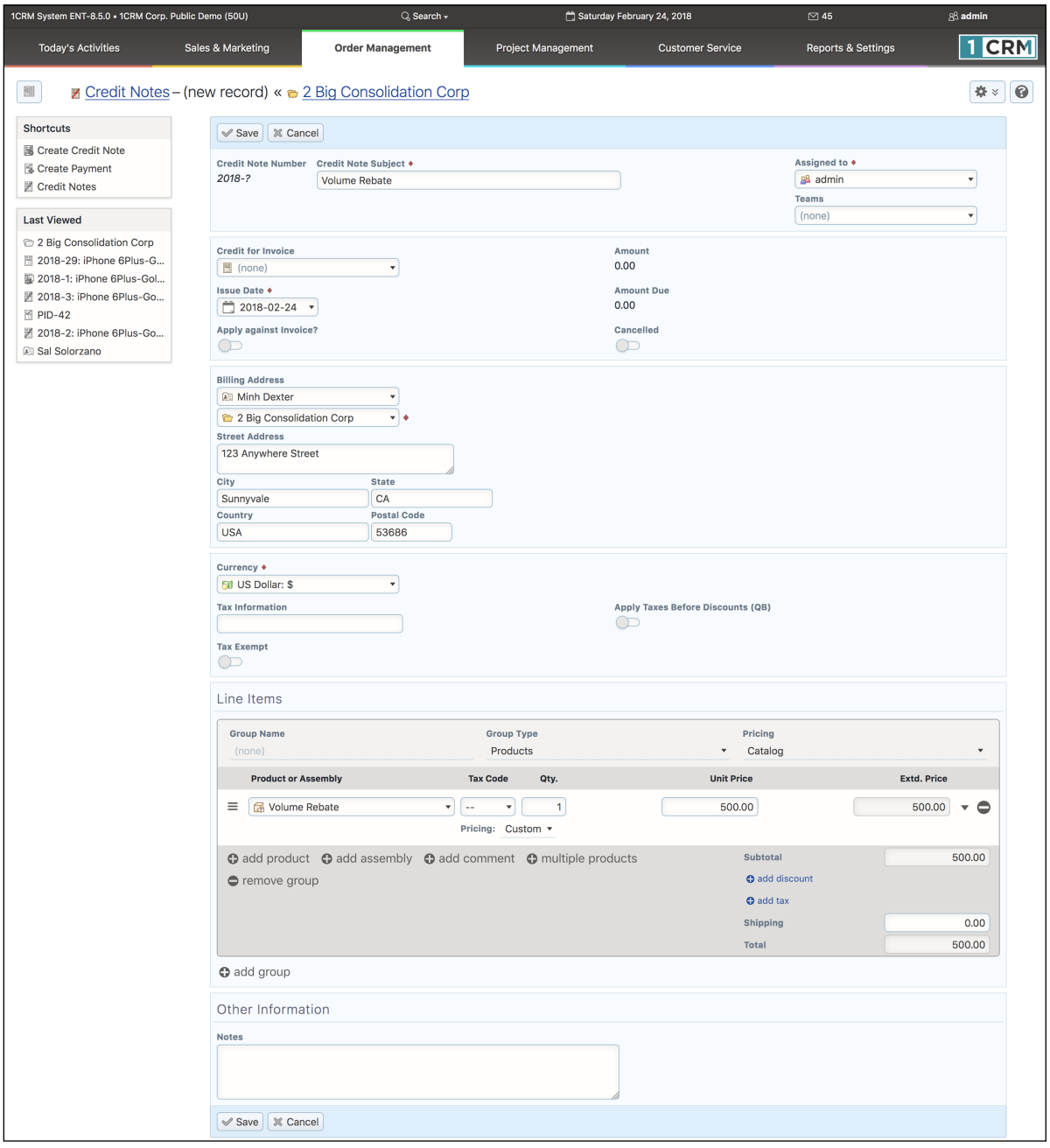


Figure 187: Account Level Credit Note

Once you fill in that form and Save it, you'll see an Account detail screen like Figure 188, showing a reduced *Balance Receivable*, and a related credit note.

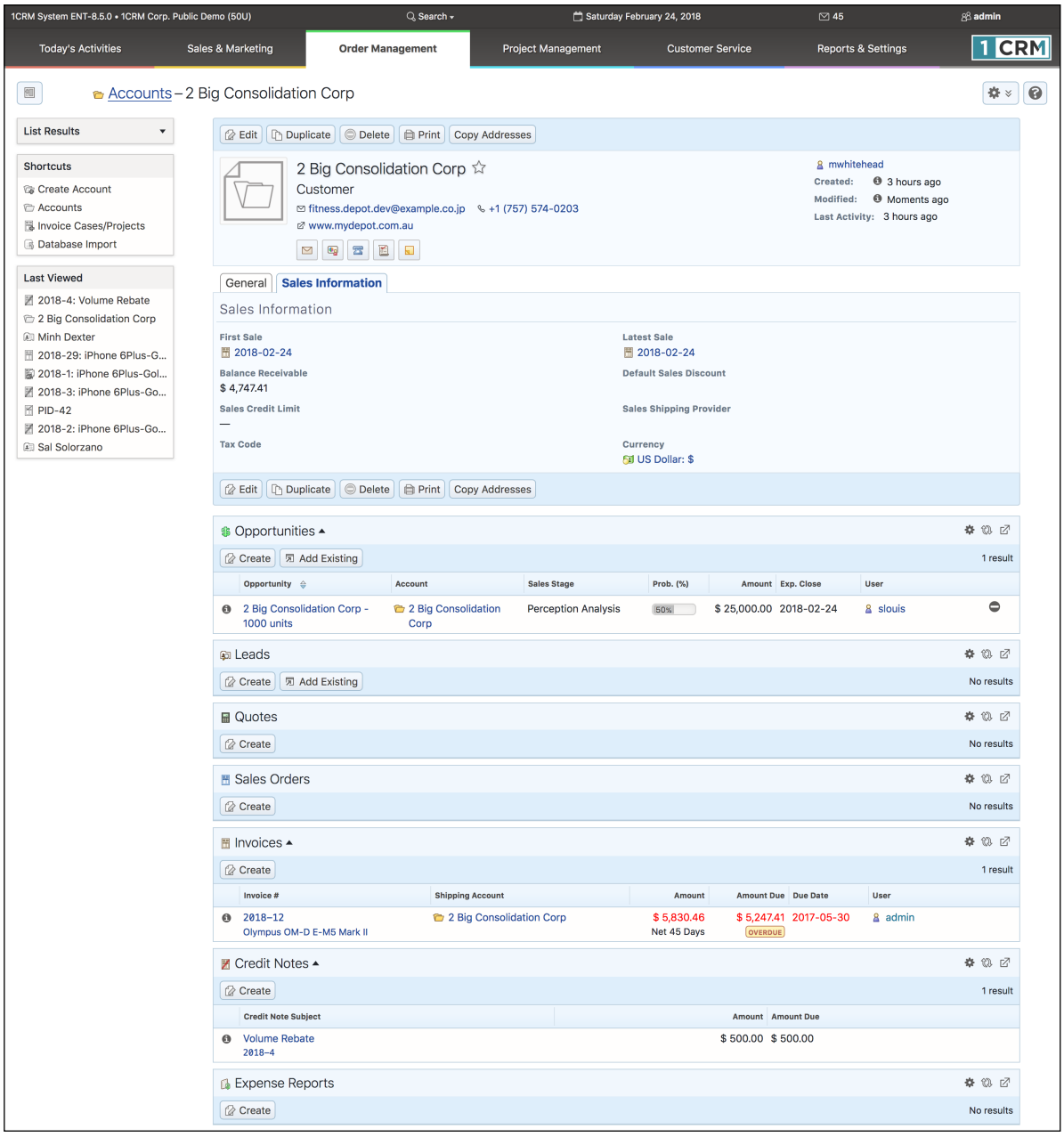


Figure 188: Account with Credit Note, Reduced Balance Receivable

6.5 The Shipping Module

Figure 189 shows the 1CRM screen with the Shipping Module selected:

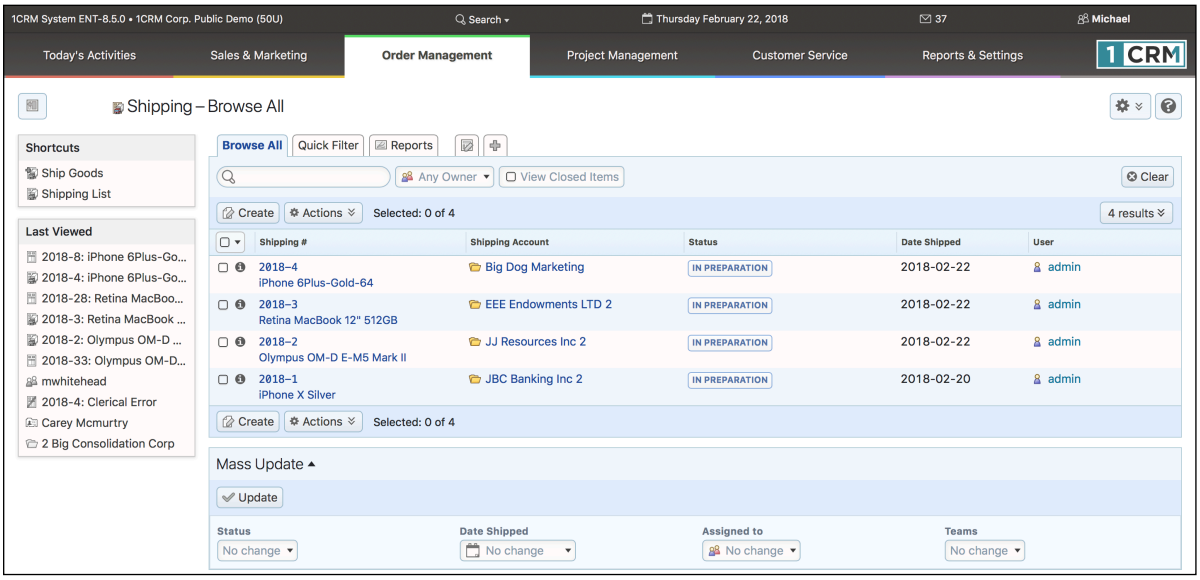


Figure 189: Shipping Module

1CRM has the ability to track inventory movements and levels at multiple warehouse locations. It does this through the use of the Shipping and Receiving modules, which record stock movements from Suppliers to the business, and from the business out to Customers.

To track inventory levels and movements, first you must define the company's warehouses. You do this on the Admin - Company Information screen - scroll to the bottom of the screen and click on *New* in the Mailing Address section to define a new company location (see Figure below). Check boxes are used to specify if the location is a warehouse, and if so, if it is the main (used as the default) warehouse.

Once the appropriate warehouses have been defined, you should define the products you carry in the Product Catalog, and also set the initial quantities in stock at each warehouse. Once this is done, you are ready to proceed to use the Shipping and Receiving modules.

On entry, the Shipping module provides a list of all or selected Shipping records. The *View Closed Items* check box may be used to see shipments that have already been shipped. Each Shipping record shows the Account to which items were shipped, as well as the date items were shipped. Each Shipping record in the list has a check box at the left, and at the bottom of the screen is a Mass Update panel to update one or more field values for all selected records. The list of Shipping records may be sorted by clicking on any column title that has the ⬍ icon beside it. Clicking on a column title when it is already the highlighted sort column reverses the sort order.

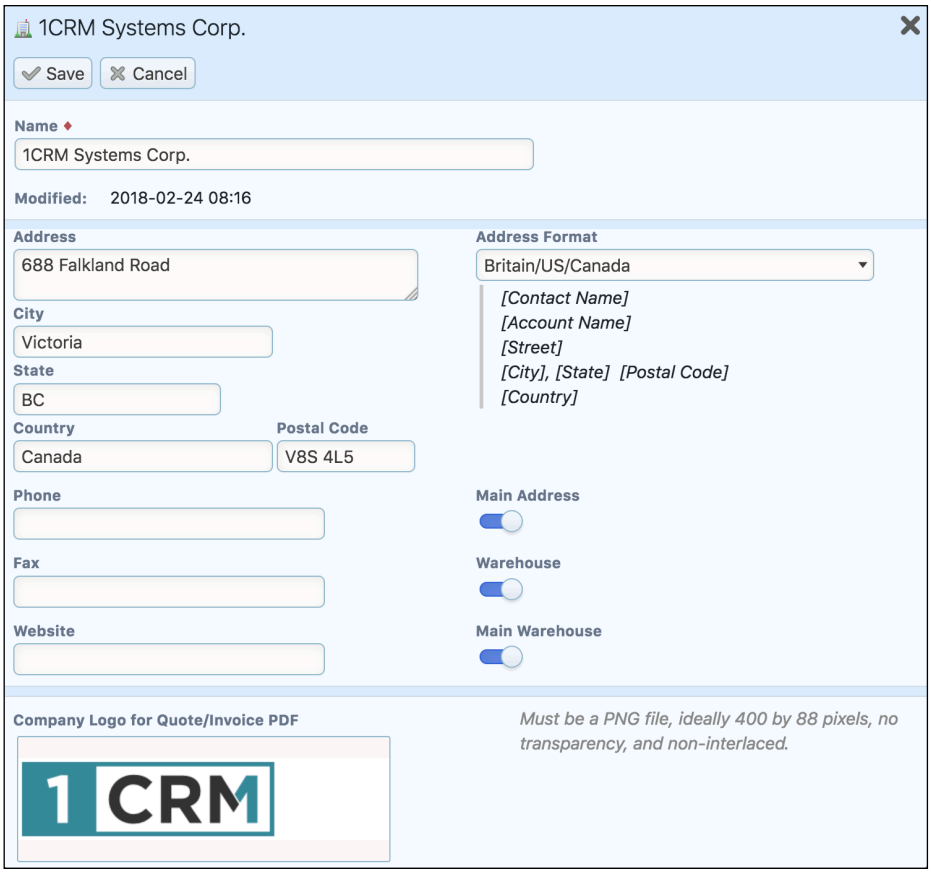


Figure 190: Defining a New Company Address

The Shipping list is paginated if it contains more items than may be listed on the display, and controls are provided to go to the start or end of the list, or step to the next or previous page. Clicking on the subject for any Shipping record in the list displays the detail information for that Shipping record. Clicking on the Account name for a Shipping record links to the detailed information for that Account. The navigation shortcuts provided help you create a new Shipping record, or switch back to the Shipping list view.

Most Shipping records are created by clicking on the Ship It! button on the detail view of an Invoice. Clicking this button creates a new Shipping record, with all the groups and line items from the Invoice on it. You may choose to remove some of the line items if only part of the Invoice is being shipped. You may also enter the serial numbers of the items being shipped, if the Admin option to show serial numbers for each line item is enabled.

You also need to enter the shipping cost and currency, select the Shipping Provider and Warehouse location, and enter the weight of the package(s) being sent.

A Shipping record may be saved with its Status set to *In Preparation*, or set to *Shipped*. If it is saved with a status of *In Preparation*, then the act of shipping the items is not considered to have happened yet, and no quantities are removed from inventory. The inventory is only removed when the Shipping record is saved with a status of *Shipped*.

When the Shipping record is saved with a status of *Shipped*, then the associated Invoice record is also marked with a Shipping Status of *Shipped*. Until then, the Invoice has a Shipping Status of *Pending*.

From the detail view of the Shipping record, you can print a packing slip by clicking on the Print button. In the popup that results, you may select the company address and PDF Form, and choose whether to just generate the PDF, or in addition link it to an email you wish to send.

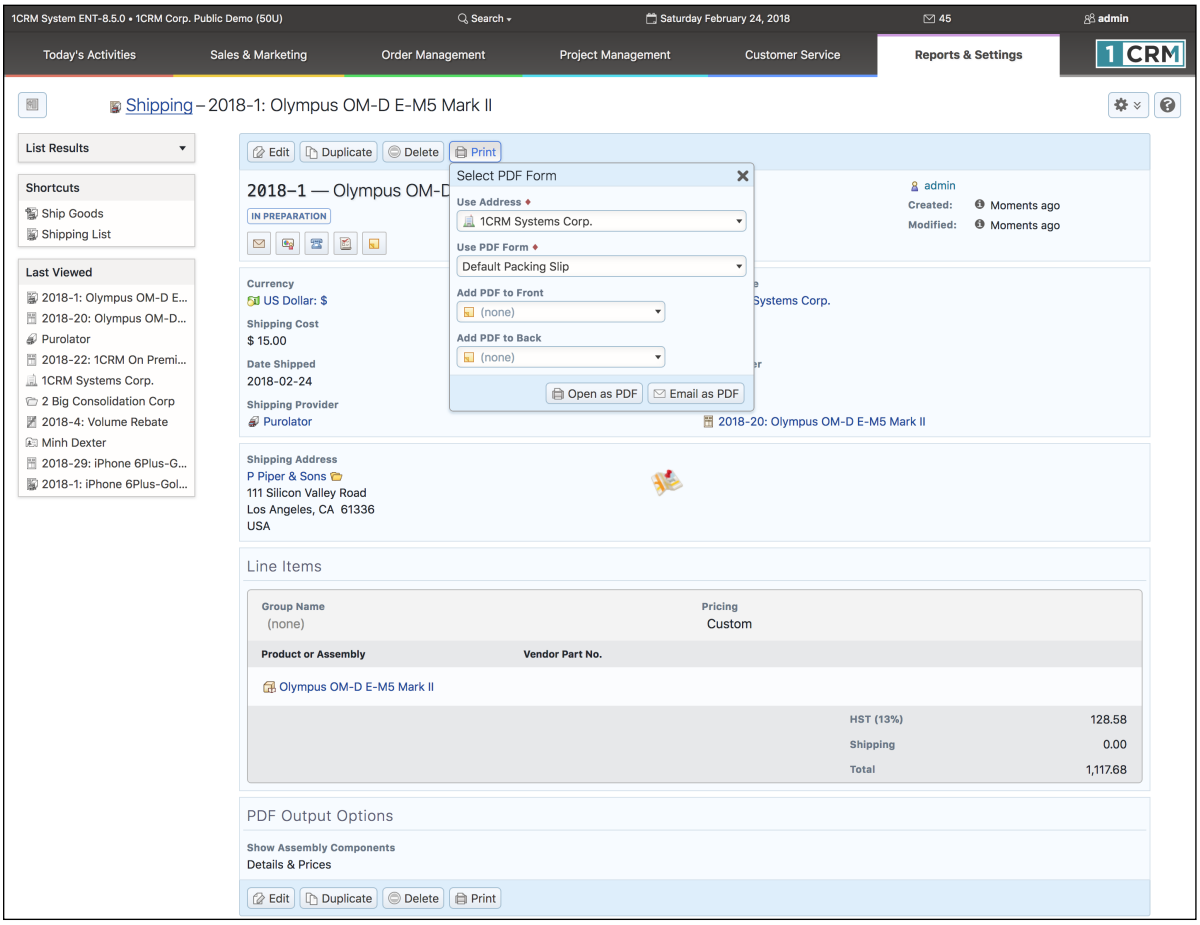


Figure 191: Printing a Packing Slip

6.6 The Payments Module

Figure 192 shows the 1CRM screen with the Payments Module selected using the Payments navigation tab:

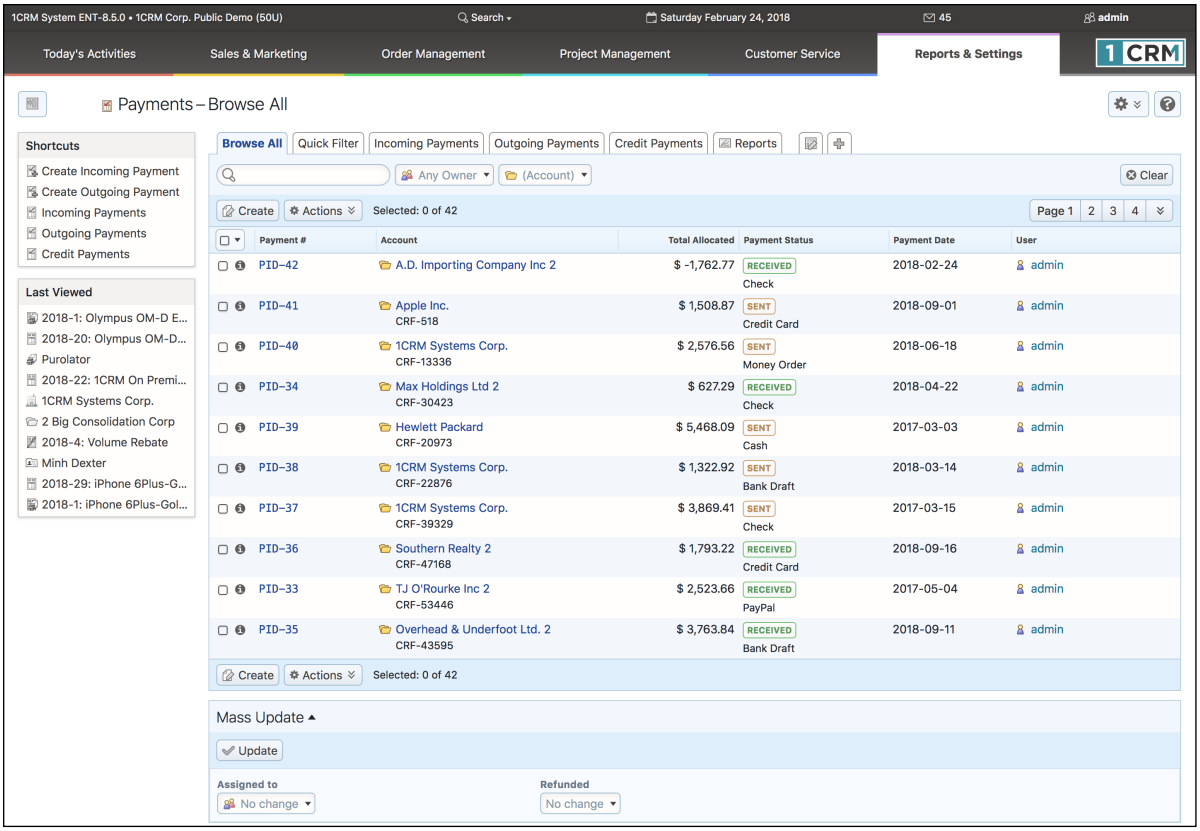


Figure 192: The Payments Module

The Payments list view screen has multiple layout tabs across the top, enabling the user to focus on *Incoming Payments*, *Outgoing Payments*, or *Credit Payments* (Payments made in association with issuing a credit note).

As with other modules, you can search for a specific payment using the *Browse All* or *Quick Filter* tabs, or you may define your own Smart List tab to list specific payments.

The module also offers shortcuts to create both Incoming and Outgoing Payments.

- Creating an Incoming Payment is dealt with in detail in *Section 6.3.6 - Applying Incoming Payments*.
- Creating an Outgoing Payment is dealt with in detail in *Section 6.8.1 - Applying Outgoing Payments*.

See the section on Credit Notes for details on creating a Credit Payment.

6.7 The Purchase Orders Module

Figure 193 shows the 1CRM screen with the Purchase Orders Module selected using the Purchase Orders navigation tab:

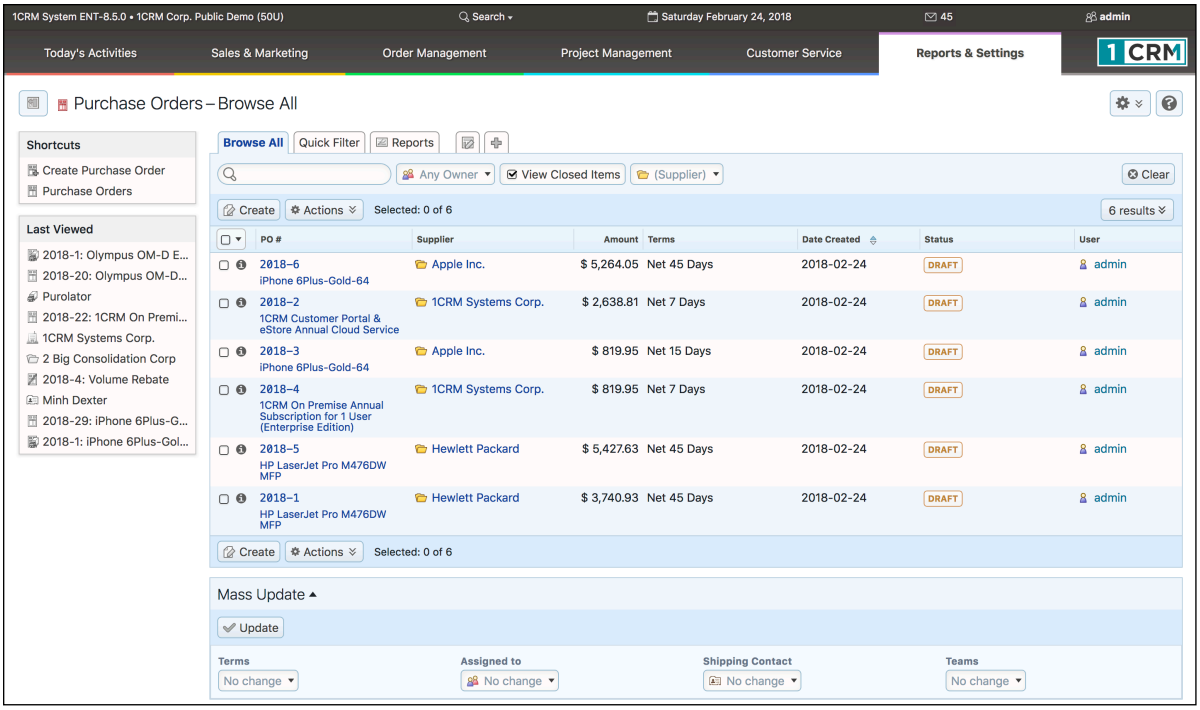


Figure 193: The Purchase Orders Module

The Purchase Orders module manages the creation of Purchase Orders you are sending to your suppliers. Purchase Orders are created in a manner very similar to Quotes, by defining a quantity for each of a number of Products (or Assemblies, which are complex products defined from a set of component products), and an Account from which they are being purchased. Purchase Orders may be managed and tracked through their life-cycle using the Purchase Orders module.

On entry, the Purchase Orders module provides a list of all or selected Purchase Orders. The *View Closed Items* check box may be used to see Purchase Orders that have already been received. Each Purchase Order in the list has a check box at the left, and at the bottom of the screen is a Mass Update panel to update one or more field values for all selected Purchase Orders. The Purchase Orders list may be sorted by clicking on any column title that has the ⬍ icon beside it. Clicking on a column title when it is already the highlighted sort column reverses the sort order.

The Purchase Orders list is paginated if it contains more items than may be listed on the display, and controls are provided to go to the start or end of the list, or step to the next or previous page. Clicking on the Subject for any Purchase Order in the list displays the detail information for that Purchase Order. Clicking on the Supplier Name for a Purchase Order links to the detailed information for that Supplier Account.

The navigation shortcuts provided help you create a new Purchase Order, or switch back to the Purchase Order list view.

Each Purchase Order (P.O.) has terms defined for it – selected from a standard set of terms (COD, Due On Receipt, Net 7 Days, Net 15 Days, Net 30 Days, Net 45 Days, Net 60 Days). Each Purchase

Order has a Supplier Contact and an Account (the Supplier). For each Purchase Order the Shipping Provider, and the Currency must also be selected.

When selecting the Supplier for a Purchase Order, note that only those accounts will be shown in the pop-up selection box for which *Is a Supplier* has been checked off. You should make a point of setting this check box on the Account record for all your suppliers before you start to use the Purchase Orders module.

Note: *Is a Supplier* must be checked at the time an Account is created - it may not be edited later.

Each Purchase Order consists of one or more product groupings, and each product group may have one or more Products (or Assemblies) in it. For each grouping, one or more Discounts may be selected from those defined in Admin, and as well a shipping charge may be specified at the group level of the Purchase Order.

Sometimes when you order items from a supplier, you want the supplier to deliver those items directly to your customer, not to your own offices. This practice is known as drop-shipping. When you are preparing a Purchase Order, if you wish the items on it to be drop-shipped directly to one of your customers, simply click on the *Add Drop Ship* check box in the Ship To panel of the Purchase Order Edit screen. Now you can type in or select an Account address to which you want the items on the Purchase Order delivered.

When a Drop Ship address has been set for a Purchase Order, if you prepare a PDF for the Purchase Order it will have an explicit *Ship To:* address added to it.

6.7.1 Business Workflow for the Purchasing Process

Purchase Orders are the first stage of the workflow for the purchasing process within 1CRM. Using the *Convert to Bill* option on the

button, a Purchase Order may be converted automatically into a Bill. Line items may be added or removed, and quantities adjusted, in the process of this conversion.

Usually one Purchase Order converts into a single Bill, but in the case of partial shipments multiple Bills are possible, and so a Bills sub-panel is linked to each Purchase Order record.

Once a Purchase Order has been created, you use the

button on the Purchase Order to record receiving the items ordered from the Supplier. This also adjusts inventory levels for the warehouse used for the receiving record. Each Purchase Order may have one or more Receiving records related to it, as shown on the Receiving sub-panel on the Purchase Order detail view.

An outgoing payment to the Supplier may be entered using the Payments sub-panel on the Bill detail view. This will adjust the *Amount Due* on the Bill, as well as the *Balance Payable* in the Purchasing Information panel on the Account record for this Supplier. As you may choose to make partial payments, there may be one or more Outgoing Payment records related to each Bill record on its Payments sub-panel.

This is the life-cycle on the purchasing side within 1CRM.

Note: Bills may also be created manually using the Create Bill shortcut. This is typically used for Bills for which there is no Purchase Order, such as telephone bills, etc.. You can only perform the *Receive It!* function for a Purchase Order, not for a Bill - so you must issue a Purchase Order for any products you intend to receive into inventory using a Receiving record.

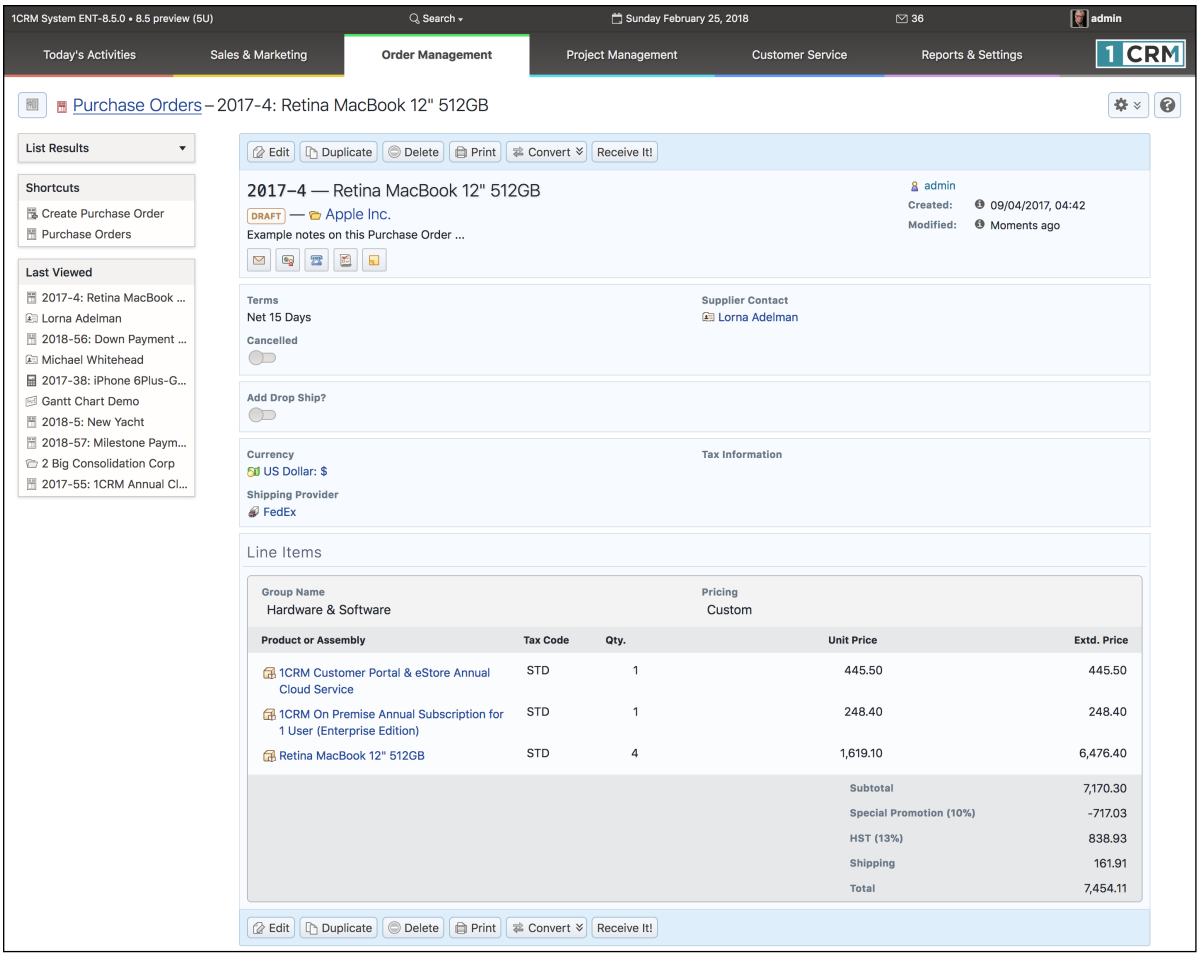
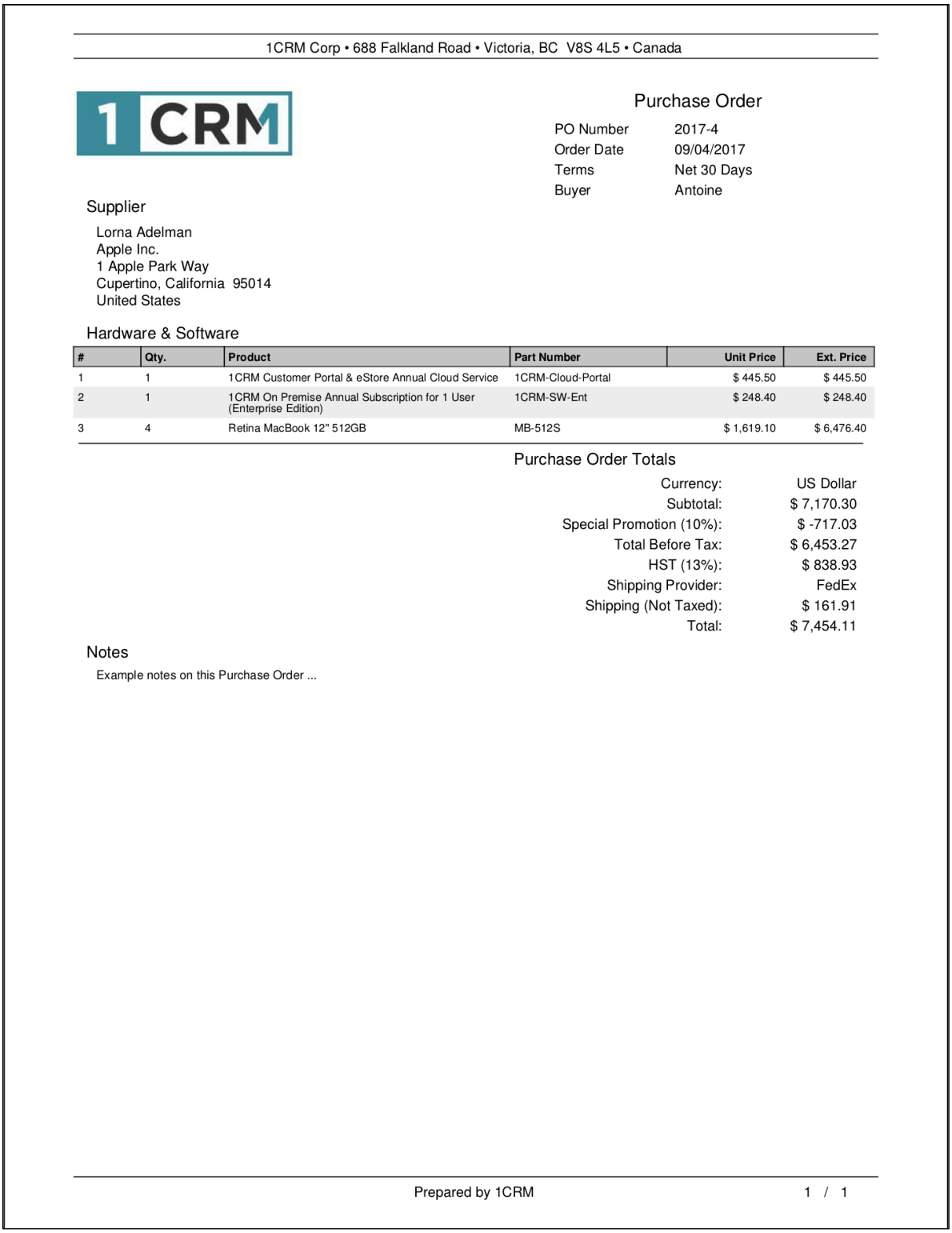


Figure 194: Purchase Order Detail View

When you initially create a Purchase Order, you should save it with a status of *Draft*, or *Ordered*. Use the *Draft* status for Purchase Orders that you are working on, but have not yet actually ordered from the supplier. Purchase Orders should have the status *Ordered* while they remain on order with the supplier. Then, when goods are received from the supplier, you can click on the Receive It! button on the Purchase Order detail view to receive those goods, and add them into stock. The status of the Purchase Order will automatically be updated to either *Partial Shipment*, or *Received*, depending on whether or not the supplier shipped all items on the Purchase Order.

The Purchase Order detail view shown above illustrates the information captured by a Purchase Order within 1CRM – complete with Supplier Contact, Shipping Provider, taxes payable, discounts and shipping costs.

From the detail view of the Purchase Order record, you can generate a PDF by clicking on the Print button and selecting the *Prepare Purchase Order* option. In the popup that results, you may select the company address and print layout to use on the PDF, and choose whether to just generate the PDF, or in addition link it to an email you wish to send.



1CRM Corp • 688 Falkland Road • Victoria, BC V8S 4L5 • Canada

Purchase Order

PO Number	2017-4
Order Date	09/04/2017
Terms	Net 30 Days
Buyer	Antoine

Supplier

Lorna Adelman
Apple Inc.
1 Apple Park Way
Cupertino, California 95014
United States

Hardware & Software

#	Qty.	Product	Part Number	Unit Price	Ext. Price
1	1	1CRM Customer Portal & eStore Annual Cloud Service	1CRM-Cloud-Portal	$ 445.50	$ 445.50
2	1	1CRM On Premise Annual Subscription for 1 User (Enterprise Edition)	1CRM-SW-Ent	$ 248.40	$ 248.40
3	4	Retina MacBook 12" 512GB	MB-512S	$ 1,619.10	$ 6,476.40

Purchase Order Totals

Currency:	US Dollar
Subtotal:	$ 7,170.30
Special Promotion (10%):	$ -717.03
Total Before Tax:	$ 6,453.27
HST (13%):	$ 838.93
Shipping Provider:	FedEx
Shipping (Not Taxed):	$ 161.91
Total:	$ 7,454.11

Notes

Example notes on this Purchase Order ...

Prepared by 1CRM 1 / 1

Figure 195: The Acrobat PDF Generated for a Purchase Order

6.8 The Bills Module

Figure 196 shows the 1CRM screen with the Bills Module selected:

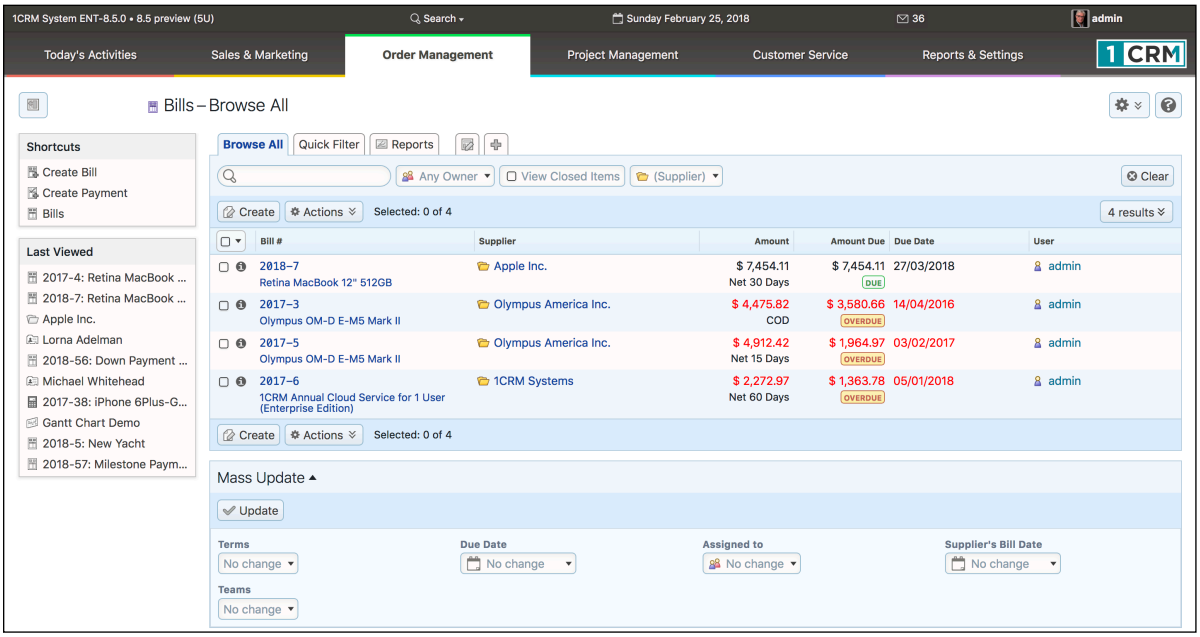


Figure 196: Bills Module

The Bills module is used to track bills you receive from your suppliers. They may be for items you have previously requested via a Purchase Order (there is a button to convert a Purchase Order to a Bill, which makes this easy), or they may be other types of bills such as phone bills, for which there is no Purchase Order. Bills are created in a manner very similar to Quotes, by defining a quantity for each of a number of Products or Assemblies, and an Account from which they are being purchased. Bills may be managed and tracked through their life-cycle using the Bills module.

Each Bill has terms defined for it – selected from a standard set of terms (*COD*, *Due On Receipt*, *Net 7 Days*, *Net 15 Days*, *Net 30 Days*, *Net 45 Days*, *Net 60 Days*). Those terms, combined with the Entry Date of the Bill, define what the due date is for the payment of the Bill. Each Bill has an Account (the Supplier), a Contact, and an address (Supplier's Bill To address is used), plus a Supplier's Invoice Number. For each Bill the Shipping Provider and the Currency must also be selected.

Each Bill consists of one or more product groupings, and each product group may have one or more Products (or Assemblies) in it. For each grouping, one or more Discounts may also be selected from those defined in Admin, and as well a shipping charge may be specified at the group level of the Bill.

On entry, the Bills module provides a list of all or selected Bills, with any overdue Bills highlighted. The *View Closed Items* check box may be used to see Bills that have already been paid. Each Bill shows the original amount of the Bill, as well as the current balance payable after any outgoing payments have been applied. Each Bill in the list has a check box at the left, and at the bottom of the screen is a Mass Update panel to update one or more field values for all selected Bills. The Bills list may be sorted by clicking on any column title that has the ⬍ icon beside it. Clicking on a column title when it is already the highlighted sort column reverses the sort order.

The Bills list is paginated if it contains more items than may be listed on the display, and controls are provided to go to the start or end of the list, or step to the next or previous page. Clicking on the

Subject for any Bill in the list displays the detail information for that Bill. Clicking on the Supplier name for a Bill links to the detailed information for that Supplier account.

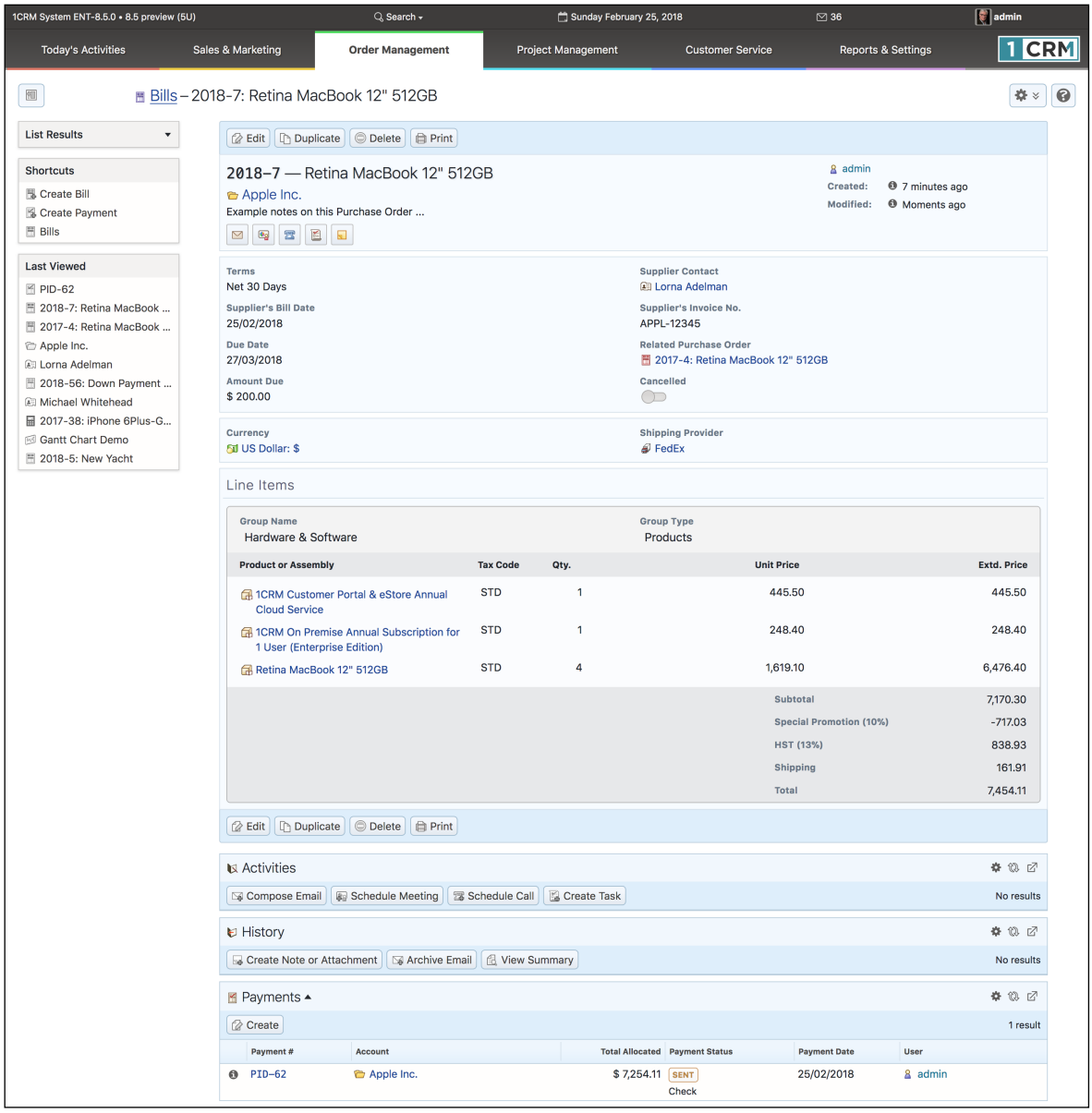


Figure 197: Bill Detail View

The navigation shortcuts provided help you create a new Bill, or switch back to the Bills list view. As well, there are shortcuts to show a list of payments made, or to create a new payment.

The Bill detail view shown above illustrates the information captured by a Bill within 1CRM – complete with Supplier Contact, Shipping Provider, taxes payable, discounts and shipping costs.

From the detail view of the Bill, you can generate a PDF by clicking on the Print button and selecting the *Prepare Bill* option. In the popup that results, you may select the company address and print layout to use on the PDF, and choose whether to just generate the PDF, or in addition link it to an email you wish to send.

The Create Payment shortcut is used to enter information about a new Outgoing Payment, and document how that Payment is to be allocated against any Bills in the system for the Supplier to which the payment is being sent.

6.8.1 Applying Outgoing Payments

To record an *Outgoing Payment* that has been sent, typically you would look up the Bill involved, and click on the Create button on the Payments sub-panel for that Bill. A Payment edit screen will come up, pre-set with most of the information you need to record. Just set the Payment Type, and adjust the amount if a partial payment is being processed, and then *Save* the record. It will be recorded with *Payment Direction* set to *Outgoing*.

Clicking on the *Outgoing Payments* layout tab in the Payments module shows a list of all or filtered outgoing payments in the system, including the payment ID and date, Amount and Type (Cash, Check, Wire Transfer, Money Order, Bank Draft, PayPal, Western Union, Credit Card).

Note: On the Outgoing Payment detail view there is a Print button from which you may select *Print Details* to simply print the information on the screen, or *Payment Advice* which may be used to print or email a Payment Advice document for the payment.

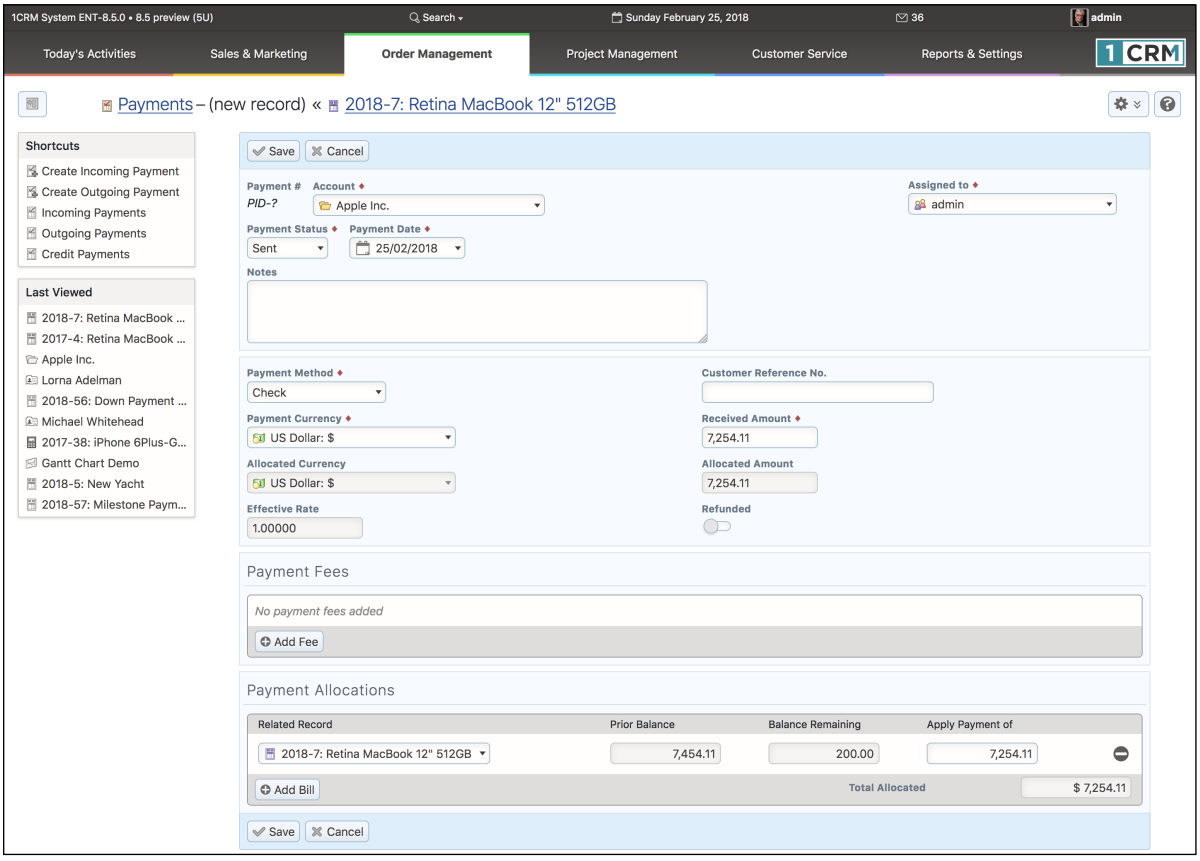


Figure 198: Payment Edit View

6.9 The Receiving Module

Figure 199 shows the 1CRM screen with the Receiving Module selected:

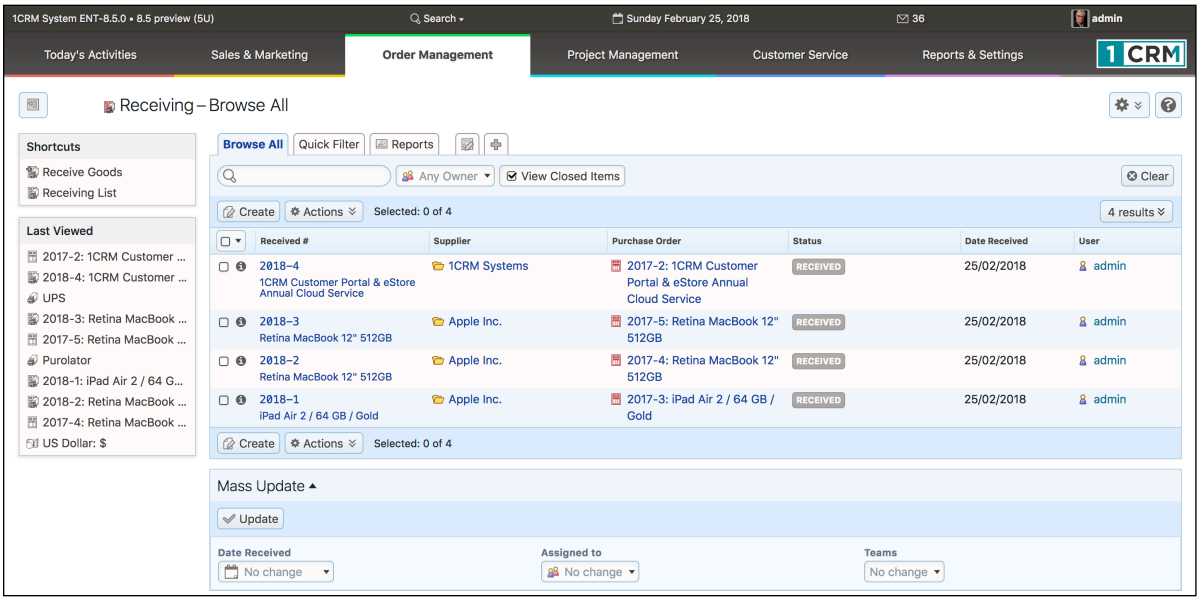


Figure 199: Receiving Module

1CRM has the ability to track inventory movements and levels at multiple warehouse locations. It does this through the use of the Shipping and Receiving modules, which record stock movements from Suppliers to the business, and from the business out to Customers.

To track inventory levels and movements, first you must define the company's warehouses. You do this on the Admin - Company Information screen - scroll to the bottom of the screen and click on *New* in the Mailing Address section to define a new company location. Check boxes are used to specify if the location is a warehouse, and if so, if it is the main (used as the default) warehouse.

Once the appropriate warehouses have been defined, you should define the products you carry in the Product Catalog, and also set the initial quantities in stock at each warehouse. Once this is done, you are ready to proceed to use the Shipping and Receiving modules.

On entry, the Receiving module provides a list of all or selected Receiving records. The *View Closed Items* check box when unchecked will show Receiving records marked with the Status of *Partial Shipment* only, and when checked it will let you see records marked with a Status of either *Partial Shipment* or *Received*.

Each Receiving record shows the Supplier from which items were received, as well as the date the shipment were received, and the Status of that receiving record. Each Receiving record in the list has a check box at the left, and at the bottom of the screen is a Mass Update panel to update one or more field values for all selected records. The list of Receiving records may be sorted by clicking on any column title that has the ⬍ icon beside it. Clicking on a column title when it is already the highlighted sort column reverses the sort order.

The Receiving list is paginated if it contains more items than may be listed on the display, and controls are provided to go to the start or end of the list, or step to the next or previous page. Clicking on the subject for any Receiving record in the list displays the detail information for that Receiving record. Clicking on the Supplier name for a Receiving record links to the detailed information for that

Supplier Account. The navigation shortcuts provided help you create a new Receiving record, or switch back to the Receiving list view.

Most Receiving records are created by clicking on the Receive It! button on the detail view of a Purchase Order. Clicking this button creates a new Receiving record, with all the groups and line items from the Purchase Order on it. You may choose to remove some of the line items if only part of the Purchase Order is being received. You also enter the serial numbers of the items being received, if the Admin option to show serial numbers for each line item is enabled. You also need to enter the Shipping Provider, and select the warehouse where the receiving is being done.

When a Receiving record is saved, its Status is set to *Partial Shipment* or *Received*, depending on whether the entire set of items on the related Purchase Order have been received, or not. Inventory is added immediately to stock quantities at the appropriate warehouse. The Purchase Order is also marked with the Status *Partial Shipment* or *Received*, in a similar fashion.

6.10 The Product Catalog Module

Figure 200 shows the 1CRM screen with the Product Catalog Module selected:

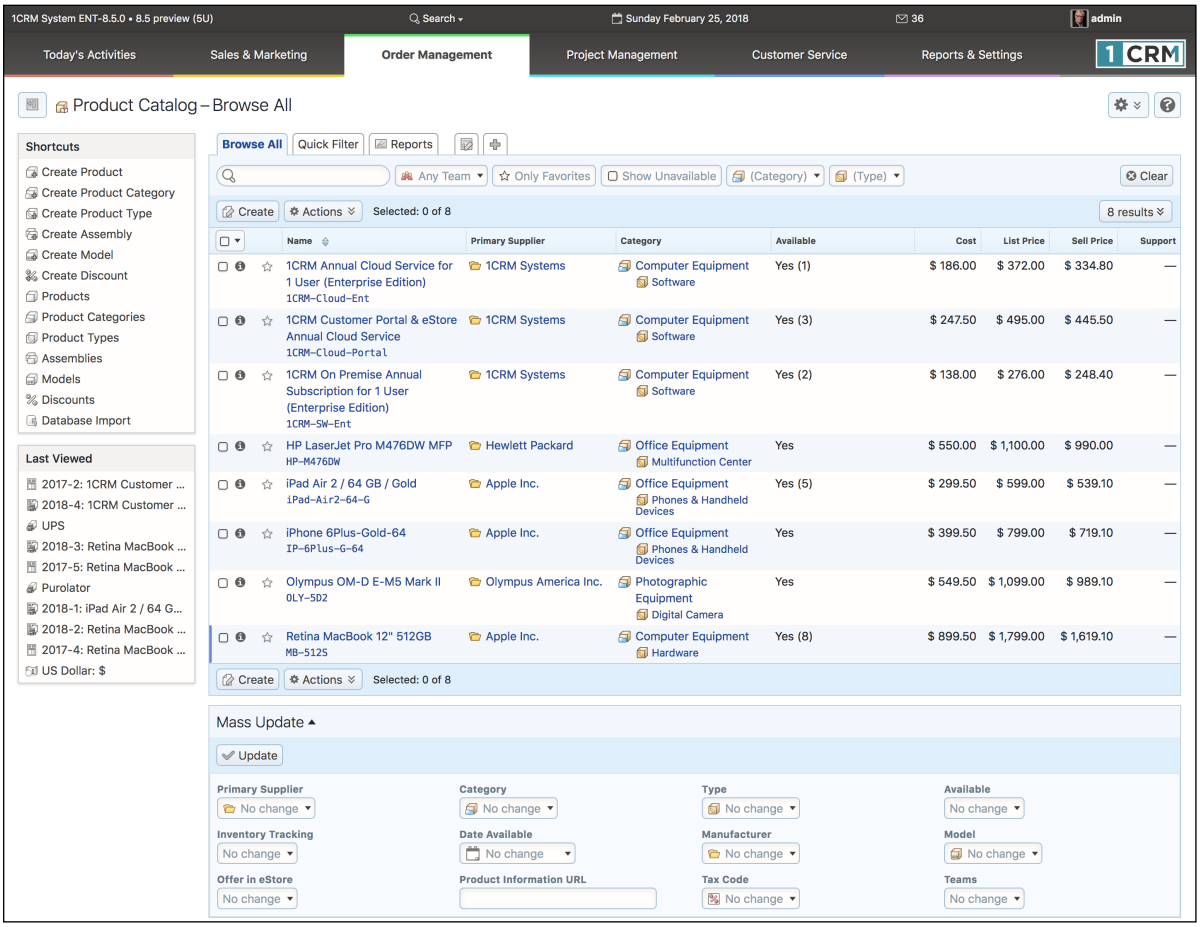


Figure 200: Product Catalog Module

There are five types of information which are used for maintaining the items in the *Product Catalog*. There are the *Products* themselves, of course, as well as the *Product Categories*, *Product Types* and *Models* to be used when defining products in the catalog.

There are also *Assemblies* (see Figure 203), which are catalog items which are not simple products, but are complex products made up of varying quantities of several other component products. For example, an Assembly called a File Server might be made up of a main logic board, a case, two power supplies, four sticks of memory, a CPU, five disk drives, and so on. Assemblies may otherwise be used like products, on Quotes, Sales Orders, Invoices, and as Supported Assemblies.

The Product Catalog screen initially displays a list view of all current products in the Product Catalog. You can choose to click on the name of a product in the list to see the detail view for that product, and potentially edit it. Or you may use the shortcuts menu to create a new product, assembly, product category, type or model, or to switch to viewing assemblies, product categories, types or models. You may also import products from a CSV file, salesforce.com or via a custom field mapping. (See the note in the Leads section about Import Test Runs.)

Note: Product Category is a high level classification of items within the Product Catalog, and Product Type is a lower level classification. One might have a Product Category for the broad area of Software, and a Product Type for a more narrow area such as Spreadsheet or Word Processor.

6.10.1 Creating a New Product

When creating a new product, or editing an existing one, you enter data including the product name, part number, associated URL, tax code, availability, quantity in stock, the Supplier, Category and Type, as well as the Cost, List and Selling prices, and their currency. There is also a *Selling Price Formula*, which may be set to *Fixed Price*, *Profit Margin*, *Markup over Cost*, *Discount from List*, or *Same as List*. This formula may be used to calculate the Selling Price automatically.

Similarly each product has a Support Cost, Support List and Support Selling Price, as well as a Support Price Formula, which may be set to *Fixed Price*, *Profit Margin*, *Markup over Cost*, *Discount from List*, *Same as List,* or *Percent of Selling Price*. This formula may be used to calculate the Support Selling Price automatically, including the popular option of having the product's annual support price be a percentage of its selling price.

The *Product Categories* shortcut lets you maintain the Product Categories that are available for the classification of items in the Product Catalog and in the eStore. Each Product Category consists of a name and a description. The *Product Types* shortcut lets you maintain the Product Types which are available for the classification of items in the Product Catalog. Each Product Type consists of a name and a description, as well as which category it fits under in the product classification hierarchy.

Models may be thought of as product families. If for example you sell Apple computers, you might define the Models *iMac*, *MacBook*, *MacBook Pro* and *Mac Pro*. All the products that you carry that are part of the Mac Pro product line (add-on hard drives, keyboards, mice, etc..) would have the Model field set to Mac Pro when defining those products. Then when a user is looking up products to add to a Quote or Invoice, they can filter for only those products for which the Model is Mac Pro, ensuring that they only quote products that are compatible with that model of Apple computer.

Once you save a new product, you see the detail screen as shown in Figure 202. Three additional types of important product-related information are set on the sub-panels of the product detail view.

The quantity of a given product that you have in stock is set by defining the stock quantities on a per-warehouse basis - even if you only have the one warehouse. You create your warehouse locations on the Company Information screen in Admin (see the relevant section in the *Implementation Guide*). Then you use the Stock sub-panel on the product detail view to enter stock quantities. You click on the *Start Edit* button, manually type in the *Qty. in Stock* for each location, then click on the *Save* button to update the stock quantities. The total quantity in stock for all warehouses is automatically calculated and is held in the main product record.

Each product in the catalog may also have a number of Attributes defined for it. These are also defined on the product detail view, not on the edit view. A product attribute is something like the colour of a product. You may wish to group all of the colours of a product under the one catalog entry, and just use the product attribute of Colour to differentiate them. You define an attribute by clicking on the Create button, then entering the attribute name, value and price adjustment, and then clicking on the *Save* button. You might enter Colour, Red, and $10.00 for one attribute, and Colour, Black and $0.00 for another, as a way of saying the product costs $10.00 more for the Red one, and the standard cost for the Black one. Note there will not be separate stock quantities held for the different colours of this product, as the system considers them to be all the one product.

While each product has a Supplier set in the main panel of the edit view, there is also a sub-panel for Suppliers in which additional Suppliers for the product may be selected. This enables you to remember alternative Suppliers for this product, while always knowing that the primary Supplier is the one shown in the main panel.

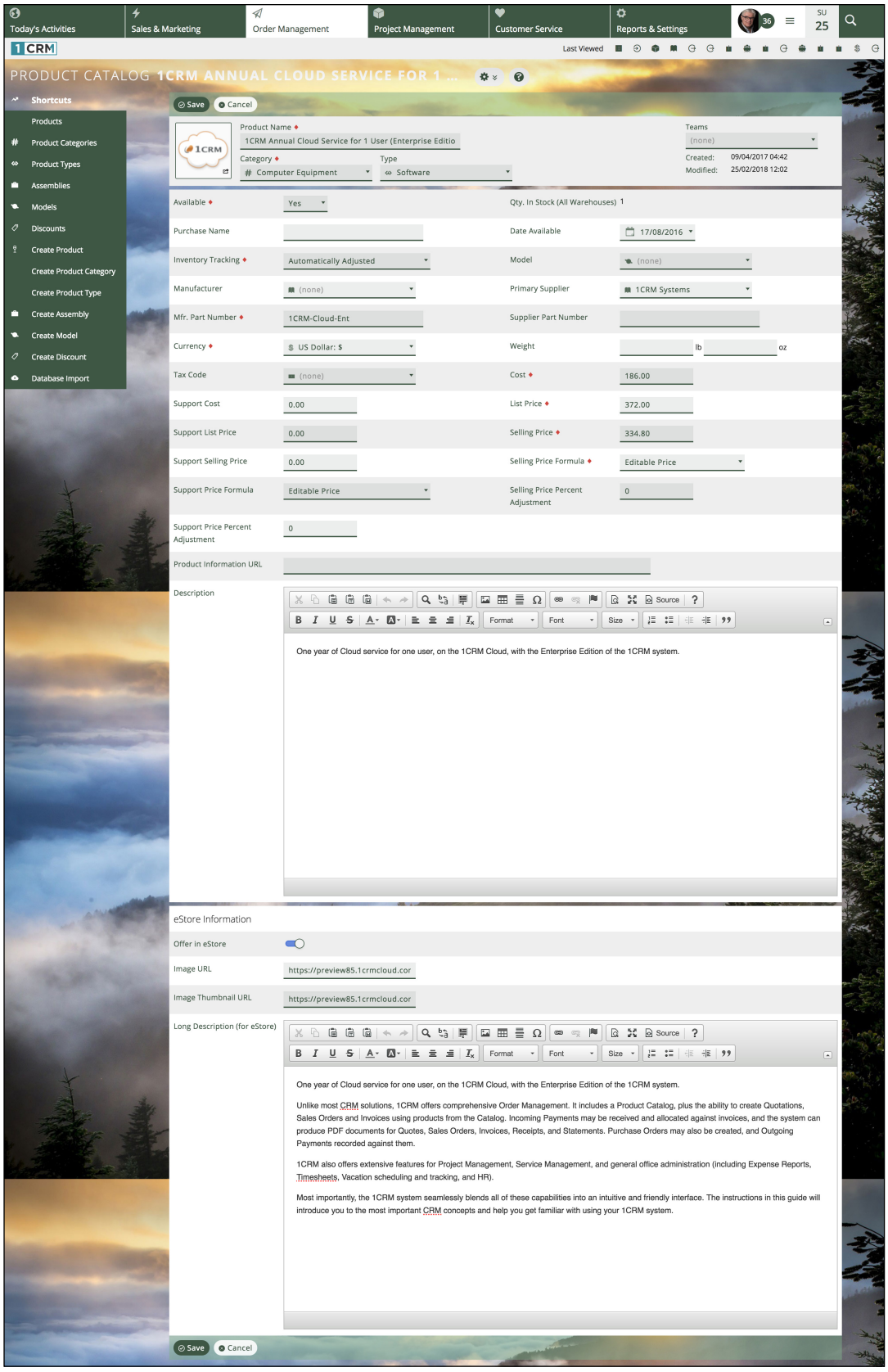


Figure 201: Product Edit View (Flex Theme)

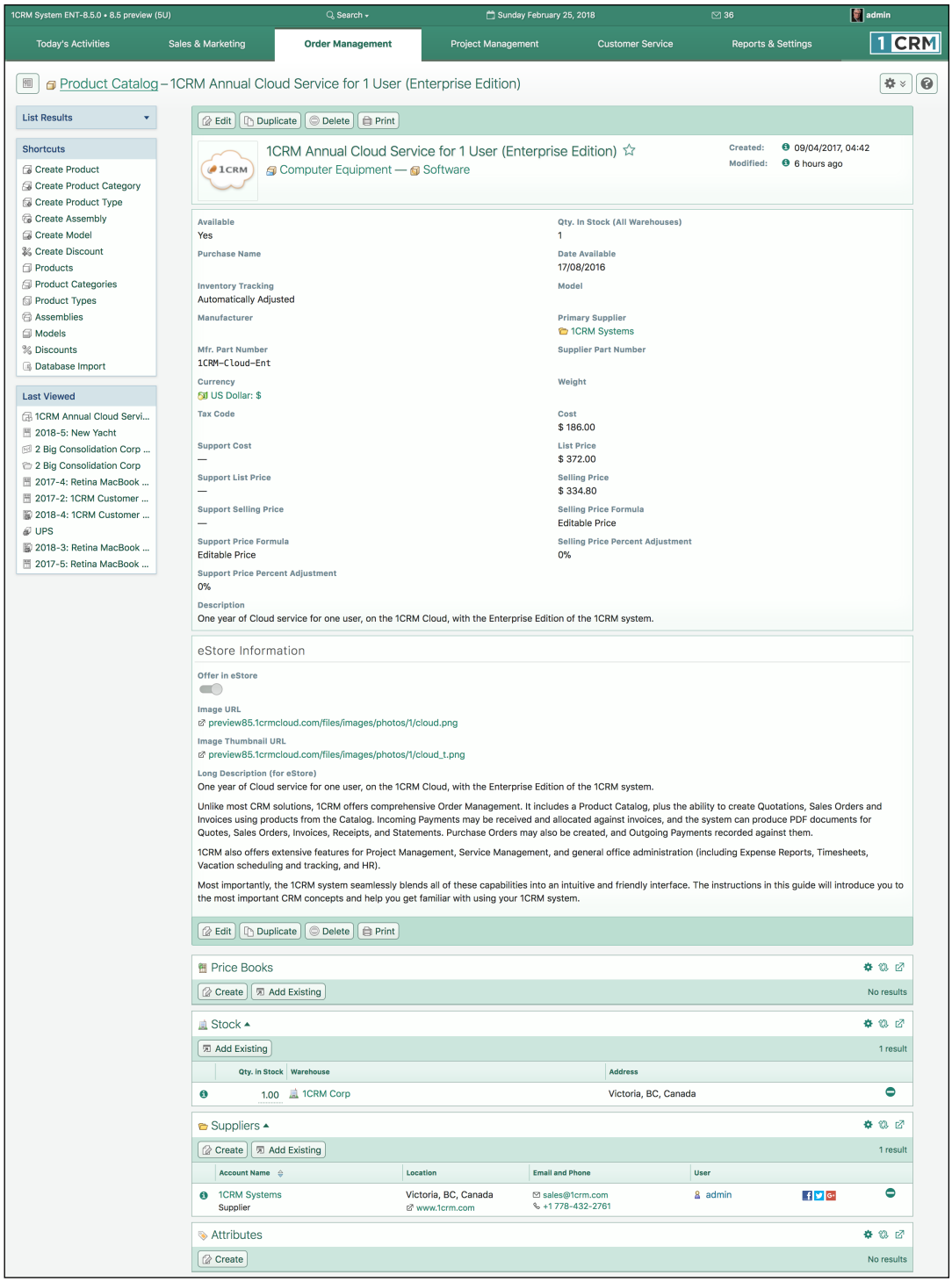


Figure 202: Product Detail View

6.10.2 The eStore Product Catalog & Catalog Sync

Each product and assembly in the catalog has a check box to indicate if it should be offered for sale in your eStore (e.g. the eStore provided by our optional Woocommerce integration). As well, large and small images of the product may be uploaded (or URLs pointing to them may be entered) to be

used by the eStore. Similarly a URL may be entered that links to detailed product information, such as that at the manufacturer's web site. Lastly, long and short product descriptions may be entered, which may be plain text or HTML, also for use in the eStore. See Figure 202 for details of these eStore data fields.

The product catalog within Woocommerce is created and managed by synchronizing it with the catalog in 1CRM. You can choose to erase the Woocommerce catalog and re-create it from the 1CRM catalog, or you can choose to update the existing Woocommerce catalog with any changes from the 1CRM catalog. This is a handy way to retain any additional Woocommerce-specific data entered within the Woocommerce admin interface.

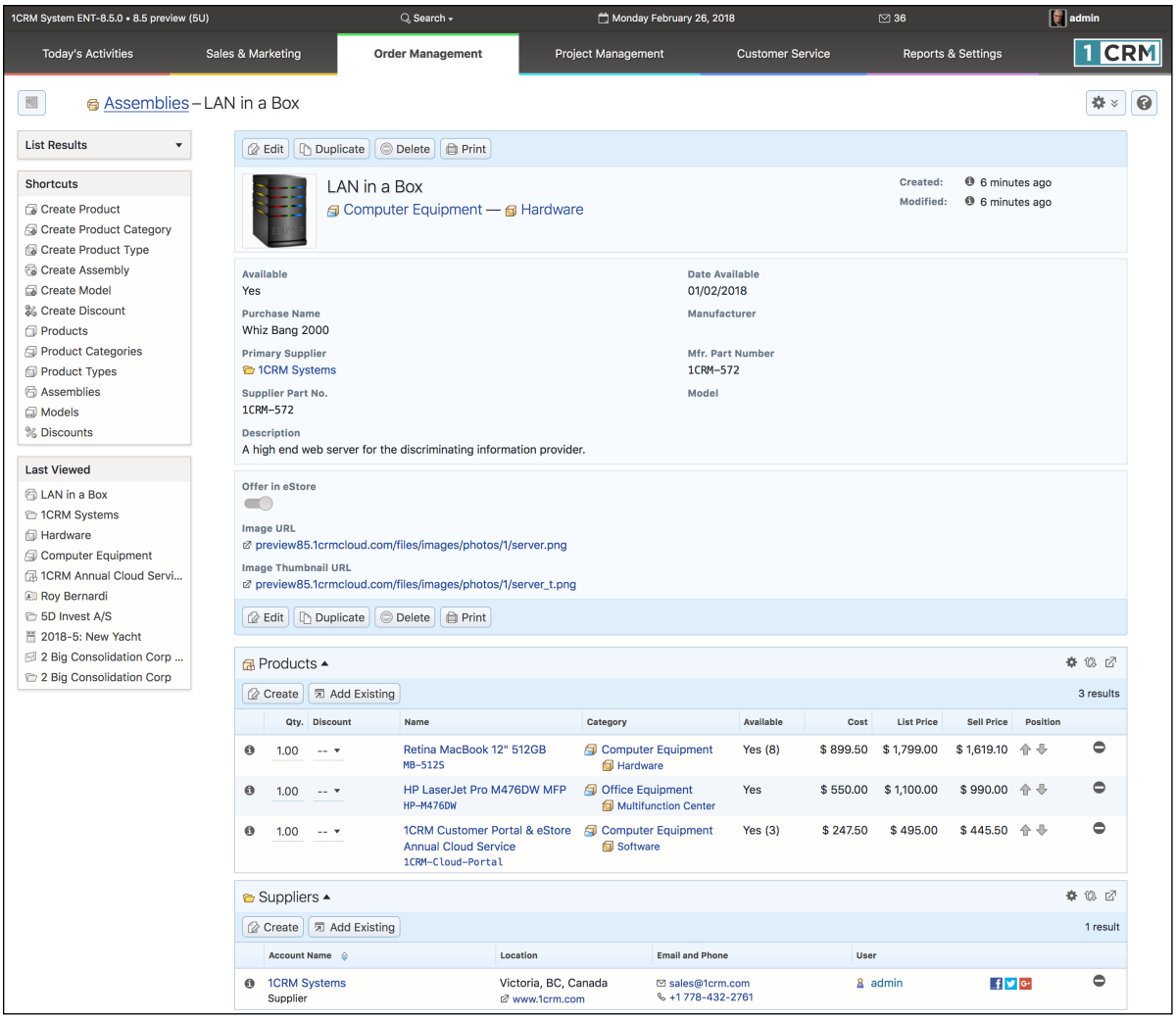


Figure 203: Assembly Detail View

6.11 The Discounts Module

Figure 204 shows the 1CRM screen with the Discounts Module selected:

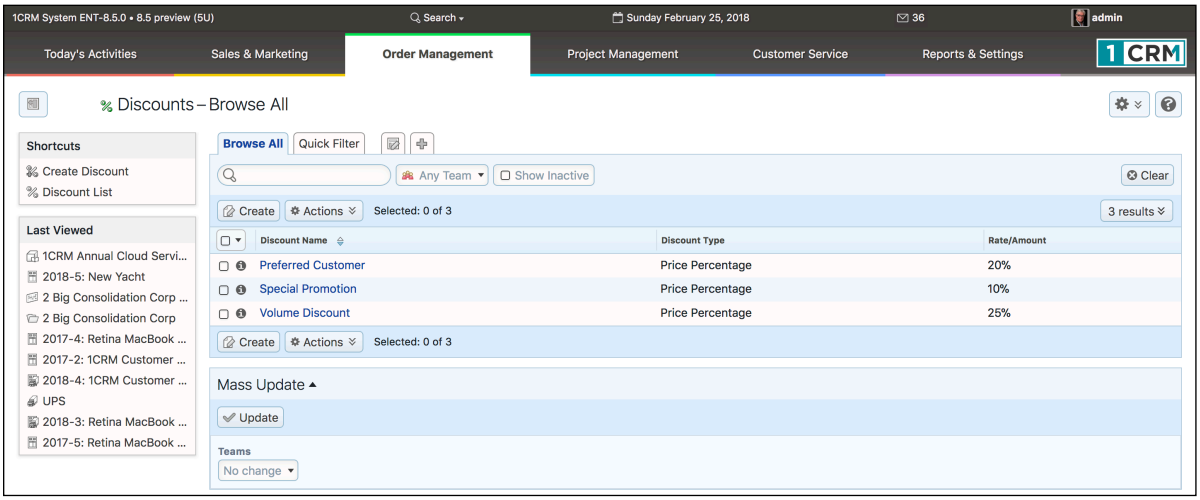


Figure 204: The Discounts Module

From the Discounts list view (within the Order Management tab group) you can readily see that Discounts may be defined as a percentage of the selling price (Price Percentage) or as a Fixed Amount. To create a new Discount, click on the Create Discount shortcut to the left side of the screen.

When defining a Discount, you set the name of the Discount, and the type (*Fixed Amount* or *Price Percentage*). If you select Fixed Amount, then you must set the amount of the discount, and the currency in which it is defined. For a Price Percentage discount, you just set the rate - the percentage of the Discount.

In either case, you may also set the Discount to be *Active* or *Inactive*, and you may limit the Discount to be applied only to specific products, or to be available for use with all products.

If you check the option that the Discount only applies to specific products, then when you save the Discount, on the detail view you will see a sub-panel of Applicable products, which you may select and relate to this Discount.

Note: Discounts may be used when adding line items to a Quote or Invoice, but also when defining an Assembly. Each line of an Assembly may have an associated discount. This can be a handy technique for defining bundles of products with specific discount rates or amounts, which might for example be offered to different types of clients.

The Discounts module has a Help icon on the title bar at the top of the main screen body, followed by a list of all the Discounts. Navigation shortcuts are provided to create a new Discount, or switch back to the Discounts list view.

6.12 The Subscriptions Module

Figure 205 shows the 1CRM screen with the Subscriptions Module selected:

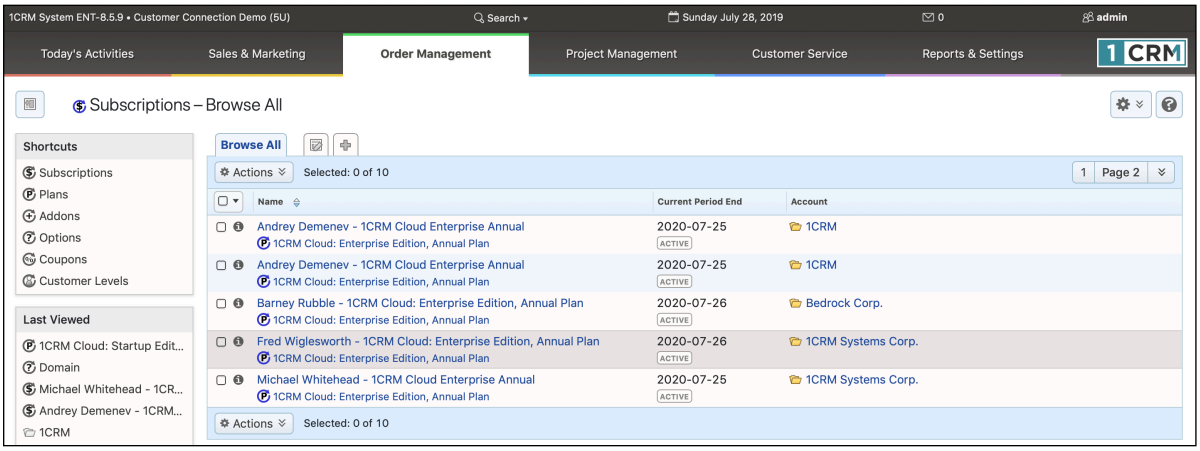


Figure 205: The Subscriptions Module

The Subscriptions module has a Help icon on the title bar at the top of the main screen body, followed by a list of all the Subscriptions.

Subscriptions will be a useful module for any organization that offers recurring subscriptions to a product or service. Within this module you will see shortcuts to the related modules of: *Plans*, *Addons*, *Options*, *Coupons* and *Customer Levels*.

It is important to understand right away that Subscriptions and the Plans, Addons, and Coupons they are based on are created within a linked Payment Processor system. Options and Customer Levels may be created within 1CRM. At present the only Payment Processor supported by 1CRM is Chargebee, so you need a subscription there if you plan to use the 1CRM Subscriptions module.

Your Administrator will need to configure the link to your Chargebee subscription using the Payment Processor configuration screen within 1CRM Admin. Once that link has been setup all of the Plans, Addons, Coupons and Subscriptions defined within Chargebee will also be seen in 1CRM.

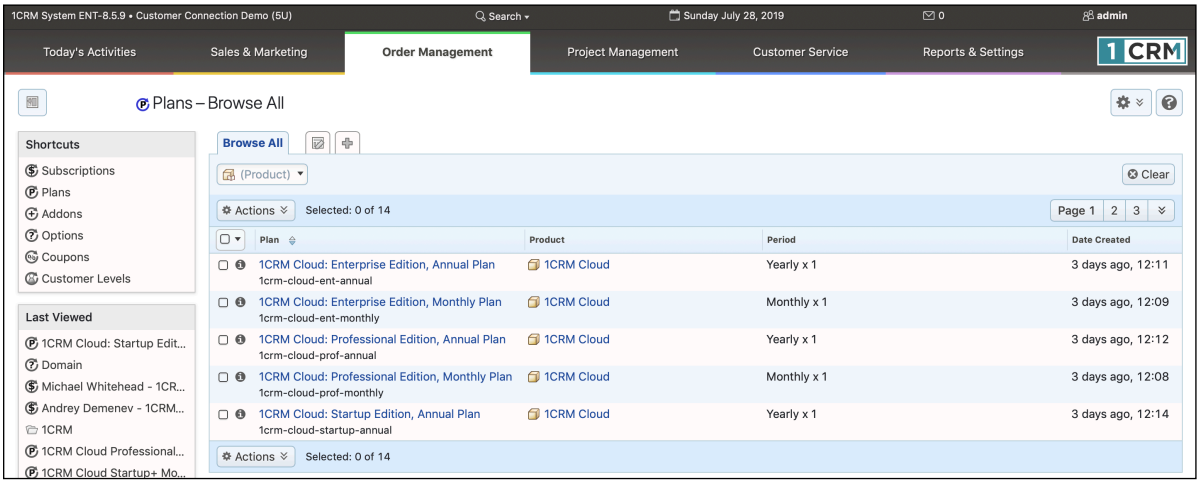


Figure 206: The Plans Module

Plans:

- A Plan defines a recurring schedule for ordering a Product.
- Plans can include Addons, Coupons, and Options.
- Plans can define which Addons may be linked to them, or whether they accept all Addons.

Each Plan consists of the following information:

- Plan Name
- Status
- Product: Link the Plan to the related Product Catalog item
- Description
- Currency
- Amount
- Setup Fee
- Billing Cycle
- Pricing Model
- Volume Discounts
- Quantity Label
- Min and Max Quantities
- Pricing Tiers

Addons:

- An Addon also defines a recurring schedule for ordering a Product.
- Addons may only be sold as part of a Plan.
- Addons may include Options and Coupons.

Coupons:

- Coupons provide a discount against a Plan, an Addon, or an entire invoice.

Options:

- Options are simply information gathered for a Plan and/or Addon when a Subscription is ordered.
- Options provide the seller with information about the buyer's wishes, ie size, colour, web address, image, etc …
- Options never affect the cost of a Plan or Addon.
- You can create Options in 1CRM - unlike Plans, Coupons and Addons.

An example of an Option is provided below:

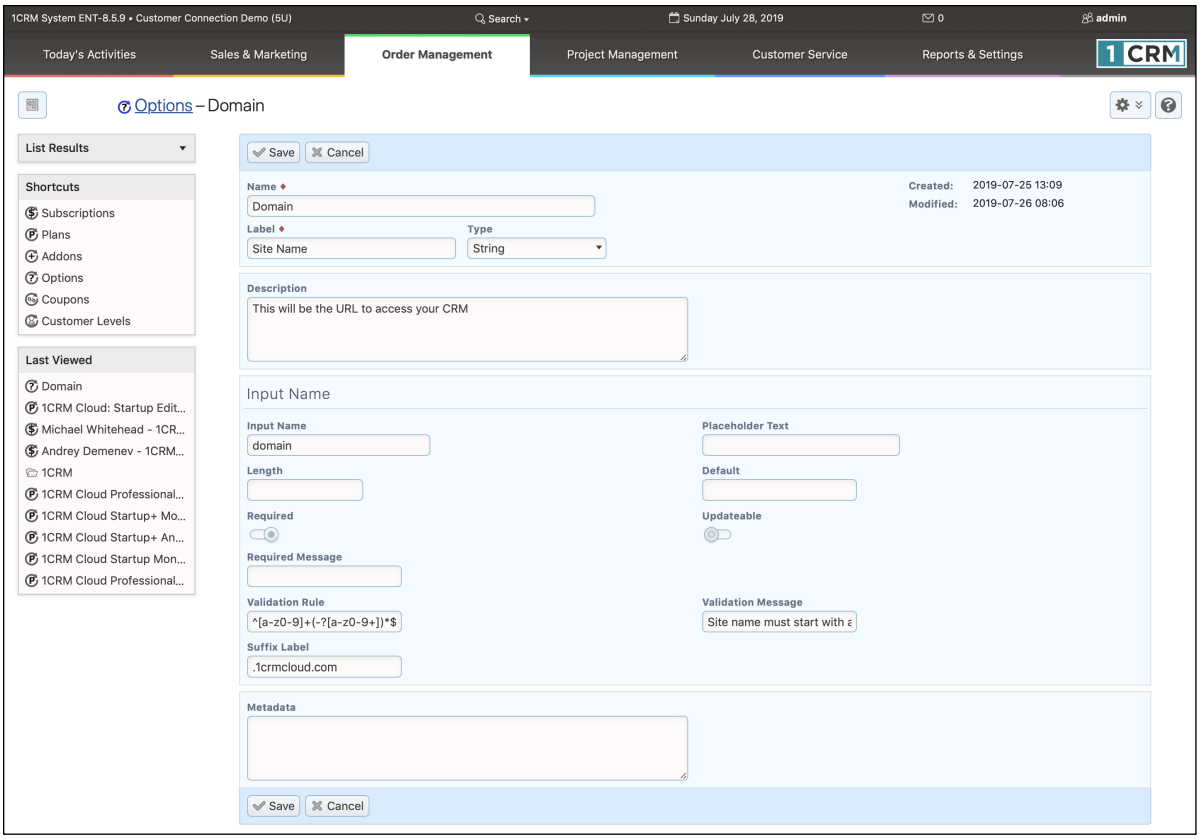


Figure 207: Creating an Option

Customer Levels:

Customer Levels are used to denote different classes of customers. For example, you may have resellers who purchase subscriptions for their customers, who receive an established discount rate. A Customer Level is based on the definition of a *Default Coupon* for a given Customer Level.

An example of a Customer Level is provided below:

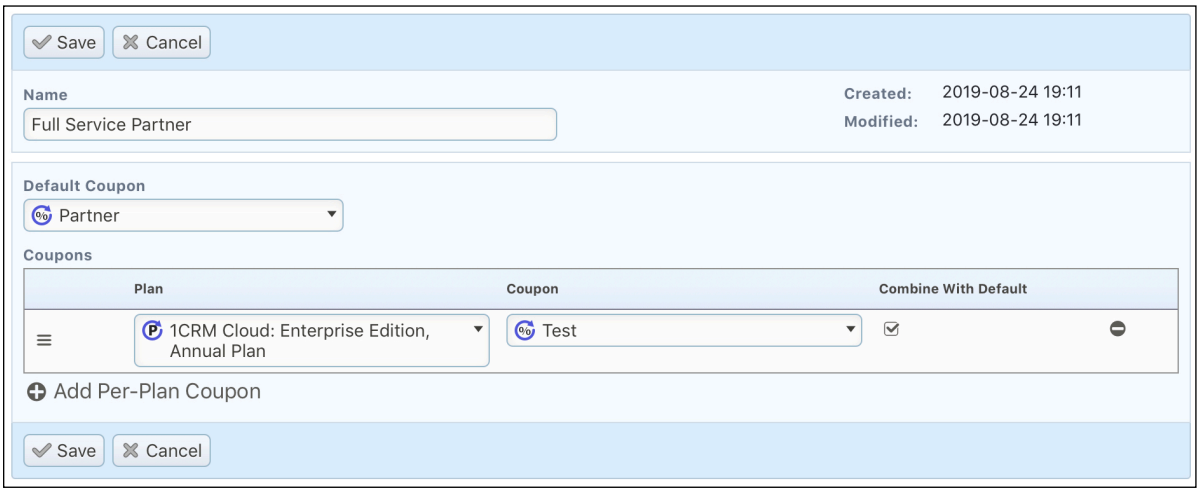


Figure 208: Defining a Customer Level

Subscriptions:

Once your Plans, Addons, Options, Coupons and Customer Levels have been defined, you can create Subscriptions - each of which will be based on a Plan, but may be modified by Addons, Options, Coupons and Customer Levels. Subscriptions also include:

- Subscription Name
- Renewal Status
- Account
- Primary Contact
- Billing Cycle
- Subscription Start Date
- Current Period Start Date
- Balance
- Current Period End Date
- Quantity

For more in-depth information on Subscriptions, and implementing Subscriptions and a link to Chargebee for your 1CRM instance, please see further details in the *Subscriptions* section of the Implementation Guide.

6.13 The Commissions Module

Figure 209 shows the 1CRM screen with the Commissions Module selected:

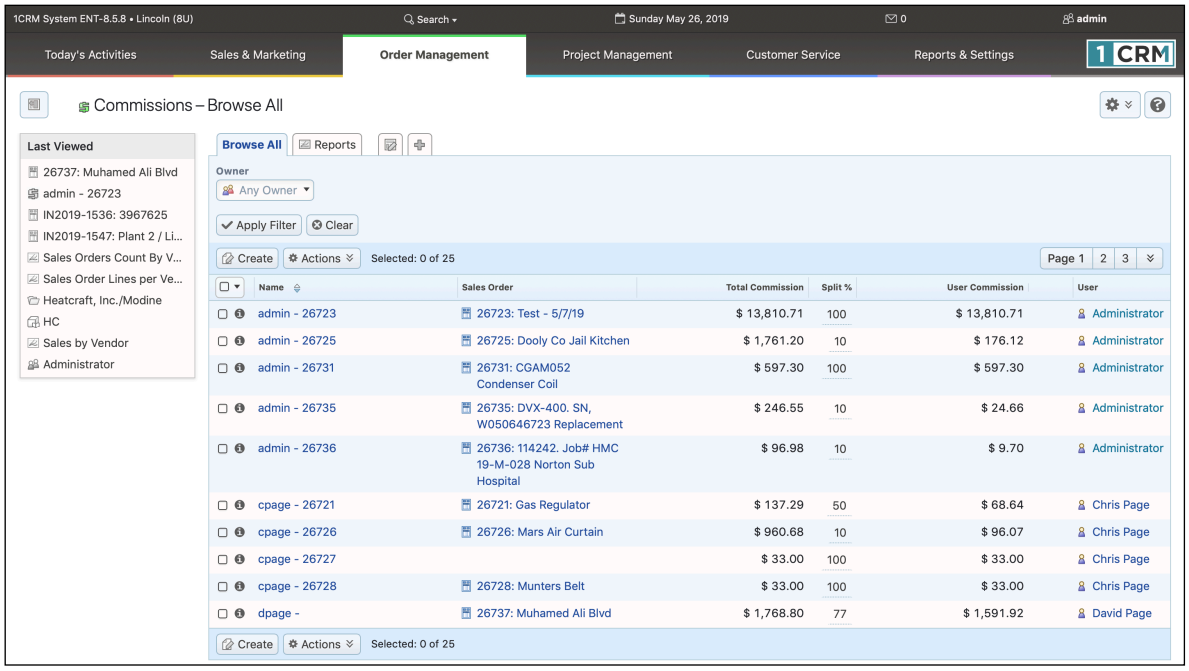


Figure 209: The Commissions Module

The use of this module is purely optional. You would choose to enable it when you would like to see sales commissions automatically calculated. The calculations are calculated based on rules your admin enters on a section within the Company Info panel:

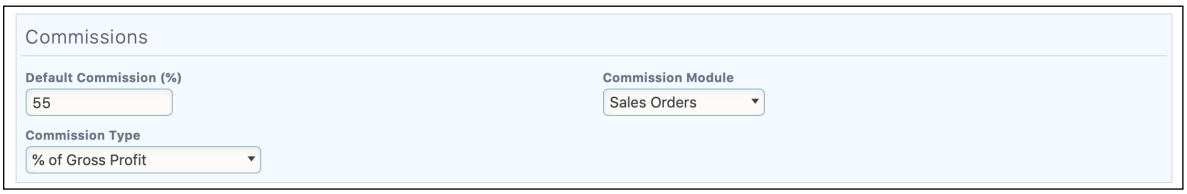


Figure 210: Configuring Commissions Options

Your commissions may be based on Sales Orders, or on Invoices, or you can choose - *None* - to disable commissions. Depending on which you choose, you can see a Commissions subpanel on the detail view of your Sales Orders, or Invoices. Those subpanels look like this:

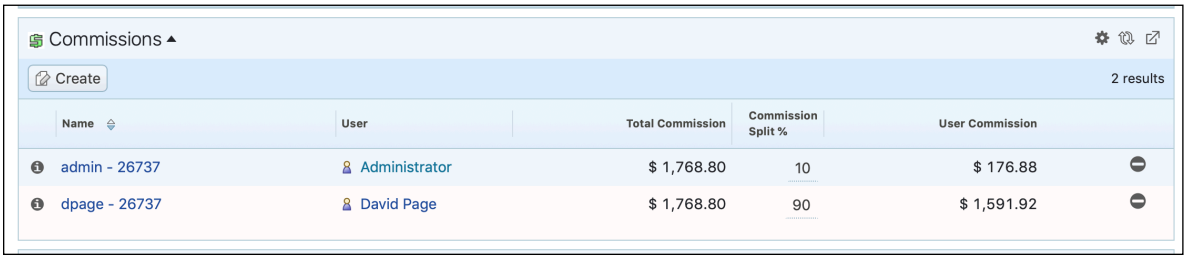


Figure 211: Commissions Subpanel

As you can see in the admin configuration panel, the commissions payable on a Sales Order or Invoice can be set as a percentage of the Gross Profit, or total Sale value. Once those values have been set, you have defined the total Commission payable on each Sales Order or Invoice.

Then on each Sales Order or Invoice you can assign all of that Commission to a single sales person (by default the user to whom the Sales Order or Invoice is assigned) or you can define a split commission across any number of sales people. The Commissions subpanel allows you to edit the percentage to be received by each salesperson, and highlights those values in red if they do not total to 100%.

To get a report of commissions due to various salespeople you can use the Commission Due interactive report to report on commissions for one or more salespeople, for any period, based on all commissions, or only those for Closed orders.

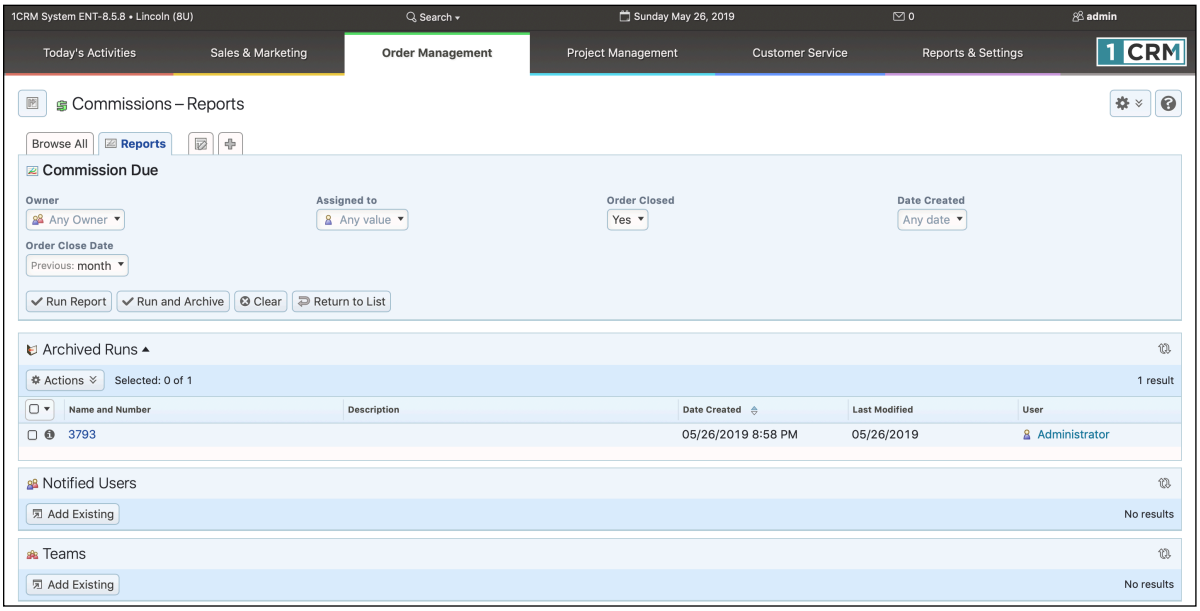


Figure 212: Commission Due Report

6.14 The Price Books Module

Figure 213 shows the 1CRM screen with the Price Books Module selected:

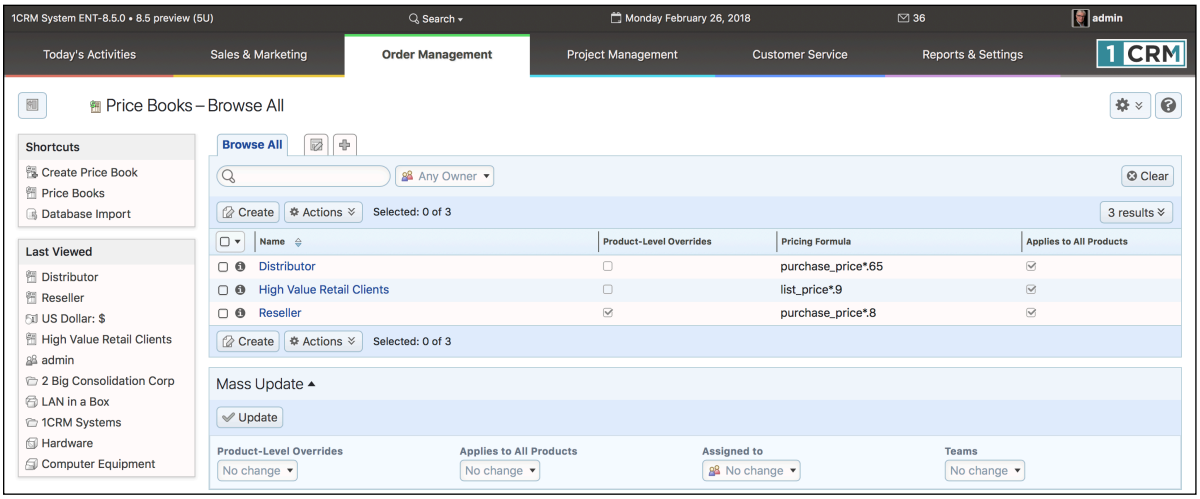


Figure 213: The Price Books Module

The Price Books module has a Help icon on the title bar at the top of the main screen body, followed by a list of all the Price Books.

From the Price Books list view (within the Order Management tab group) you can use the *Create Price Book* shortcut to define a Price Book. You'll see that it consists of a name, a formula such as purchase_price*.95, cost *1.3, or list_price/1.1, two checkboxes, and four other fields. The checkboxes are *Product-Level Overrides?* and *Applies to All Products*. The other four fields are *Round to Nearest Multiple*, *Converts to Currency*, *Part Number Prefix*, and *Part Number Suffix*.

Formulae may only use these three variable names (*purchase_price*, *cost* and *list_price*), plus the basic four operators and parentheses.

A Price Book may be set to apply to all products in the catalog. If this box is not checked, you may link a sub-set of the products directly to this Price Book, using the Products sub-panel on the Price Book detail screen, to which this Pricing Formula applies. If *Applies to All Products* is checked, you may still link individual products to a Price Book using the Products sub-panel, and edit the Pricing Formula for individual products if the *Product-Level Overrides?* checkbox is set.

The *Product-Level Overrides?* checkbox also refers to whether or not the prices on Quotes and Invoices etc.. using this Price Book should be editable. In effect, it determines if prices in this Price Book are to be used as a guideline, or if its prices are locked down, and should never be altered.

Part Number Prefix, and *Part Number Suffix* will add a prefix or suffix to the part number when that price book is used. Often used for Price Books organized by country. When using a Price Book for France, all products might get a *-FR* suffix on them, for example.

Converts to Currency if used, sets a different currency for the price in this price book. The formula should contain a fixed exchange rate in this case.

Round to Nearest Multiple rounds the value after converting it, for example set it to 5.00 to round to the nearest 5. This also also works for values less than 1.

If you plan to use Price Books, the best way to use them is to define all of them, then go through all your Accounts assigning a default Price Book to each account. If some accounts get rather variable pricing, then perhaps they have no default Price Book, or at least they are assigned one which is editable.

When editing a Quote or Invoice, when you select the Account, the Price Book for the Quote/Invoice will be set from that Account's default Price Book, if any. If the Price Book is not editable, you cannot edit the Quote/Invoice's Price Book setting while that Account is selected, and you cannot change pricing from that set in the Price Book.

7.0 Project Management

7.1 The Projects Module

Figure 214 shows the 1CRM screen with the Projects Module selected using the Projects tab:

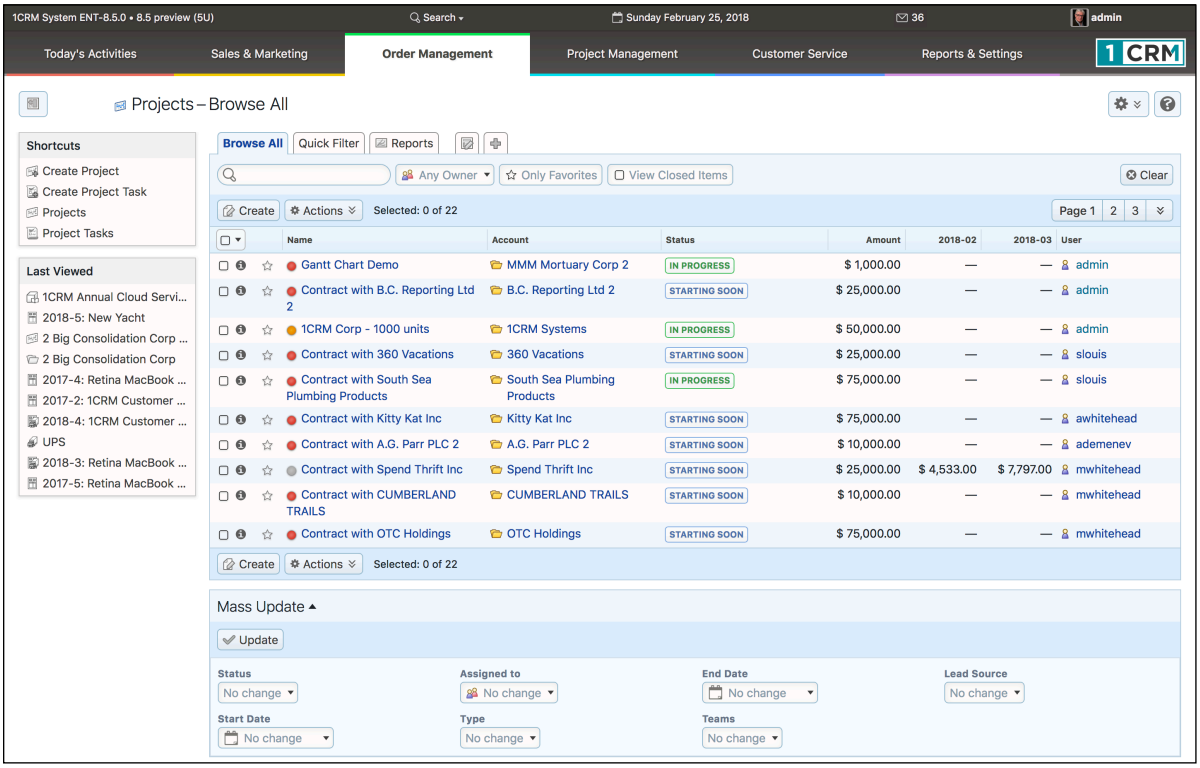


Figure 214: The Projects Module

Projects may be managed and tracked through their life-cycle using the Projects module. Projects may be assigned a Project Phase of *Active – Starting Soon, Active – In Progress, Closed – Complete, Closed – Not Pursued,* or *Closed – Terminated*. By default, Project Type may be set as *Bid Development, Internal R&D, Services Delivery* or *Subcontract*.

The Projects module has a Help icon on the title bar at the top right of the main screen body, followed by a choice of layout tabs, and a list of all or selected Projects. The *Browse All* tab can filter on Project Status, and has a default filter setting which only displays Active projects – which includes both *Active – Starting Soon*, and *Active – In Progress*. Navigation shortcuts are provided to create a new Project, or a new Project Task.

The Projects list may be sorted by clicking on any column title that has the icon beside it. Clicking on a column title when it is already the highlighted sort column reverses the sort order. The Projects list is paginated if it contains more items than may be listed on the display, and controls are provided to go to the start or end of the list, or step to the next or previous page. Clicking on any Project in the list displays the detail information for that Project. Clicking on the Account name for a Project links to the detailed information for that Account.

The Projects list view includes columns for the total value of a Project, as well as the expected revenue from the Project for the current month, and the next month.

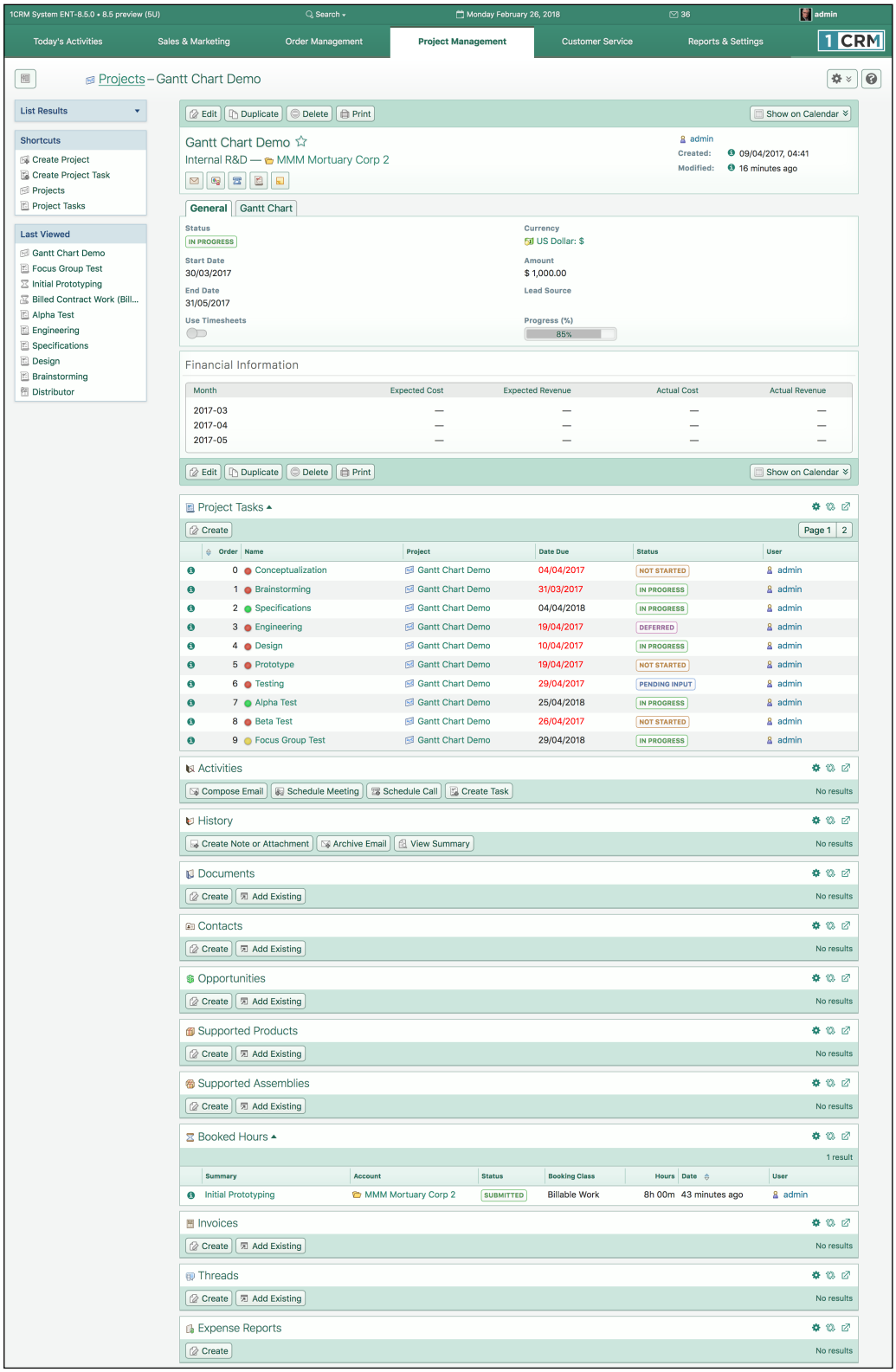


Figure 215: Project Detail View

When creating a new Project, or editing an existing Project, you should note that the Project Start Date and End Date are particularly important: rows of financial data for the Project will automatically be created and maintained for each month between the two dates.

The Financial Information panel of the project detail view shows the Expected and Actual Cost, and Expected and Actual Revenue, for each month of the project. The values for Expected and Actual Revenue are entered manually. If the *Use Timesheets* checkbox is selected for the project, then the Expected and Actual Cost values are calculated, and may not be edited manually. If *Use Timesheets* is not selected, then Actual Costs are editable, but Estimated Costs are still calculated from resource costs of the Project Tasks.

The Project Tasks sub-panel for each project defines the Project Tasks and the Resources chosen to perform each task. Each Project Task has estimated and actual hours of effort, estimated and actual costs (using a standard cost per hour for each resource, or a custom cost per hour, specified for the resource, just for this task), a Progress %, and a Status (Not Started, *In Progress*, *Completed*, *Pending Input*, or *Deferred*).

Each Project Task is assigned to a single user, but may have additional users listed on the *Assigned Resources* sub-panel on the task. Each assigned resource tracks the following data:

- Estimated Hours (entered by the user)
- Estimated Cost (Estimated Hours x Hourly Rate)
- Actual Hours (From approved hours on timesheets)
- Actual Cost (Actual Hours x Hourly Rate)
- Utilization % (100 x (Estimated Hours / available working hours))
- Hourly Rate (Custom, or Standard Hourly Rate from HR profile)
- Status (Active or Inactive – when Inactive, user cannot book time to this task)

Note: Utilization % is calculated by dividing Estimated Hours into the number of available working hours. This in turn is calculated by multiplying the number of weekdays between Start Date and Due Date (inclusive) by Hours in Work Day (from Admin – Configure Settings).

At the level of the entire project task, Progress % is calculated as the number of hours booked to the task (and approved) divided by the total number of estimated hours for the task, across all resources. Estimated and Actual Hours and Costs are also totalled for the whole task.

At the complete project level, the Expected Cost and Actual Cost values for each month are calculated as the relevant portion of these values from each task in the project. The Expected and Actual Revenue figures are simply entered manually. If timesheets are not in use for the project, Actual Costs are also simply entered manually.

Note: There is a filter option on the Activities layout in the Calendar to show Project Tasks. When selected, this option causes the Calendar to show Project Tasks on the days when the filtered users are resources on Project Tasks.

7.1.1 Project Gantt Charts

Clicking on the *Gantt Chart* tab near the top of the Project Detail screen (see Figure 215 above) will display a Gantt chart. The Gantt chart has a

button which will print the chart in an optimised manner.

The Gantt chart also has hyperlinks for each project task - clicking on the name or task bar of any project task will cause the detail view for that project task to be displayed.

As well, the Gantt chart also provides up and down arrows to the left of the name of each project task. These arrows will promote or demote the project task in the sequential order of tasks in the project. Clicking on the down arrow moves the project task down one task - clicking on the up arrow moves it up one task.

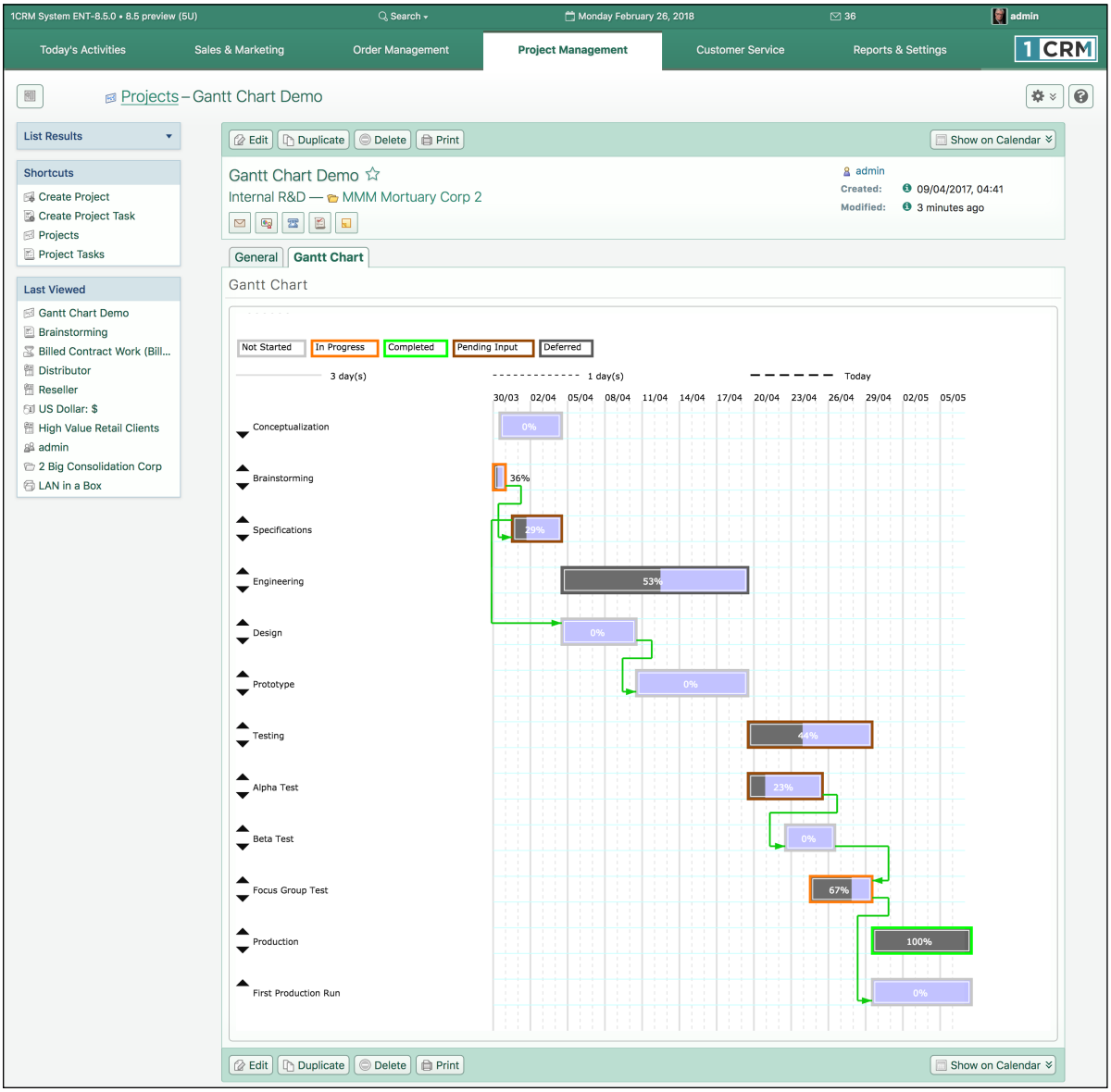


Figure 216: Gantt Chart Display

7.2 The Human Resources Module

Figure 217 shows the 1CRM screen with the Human Resources Module selected:

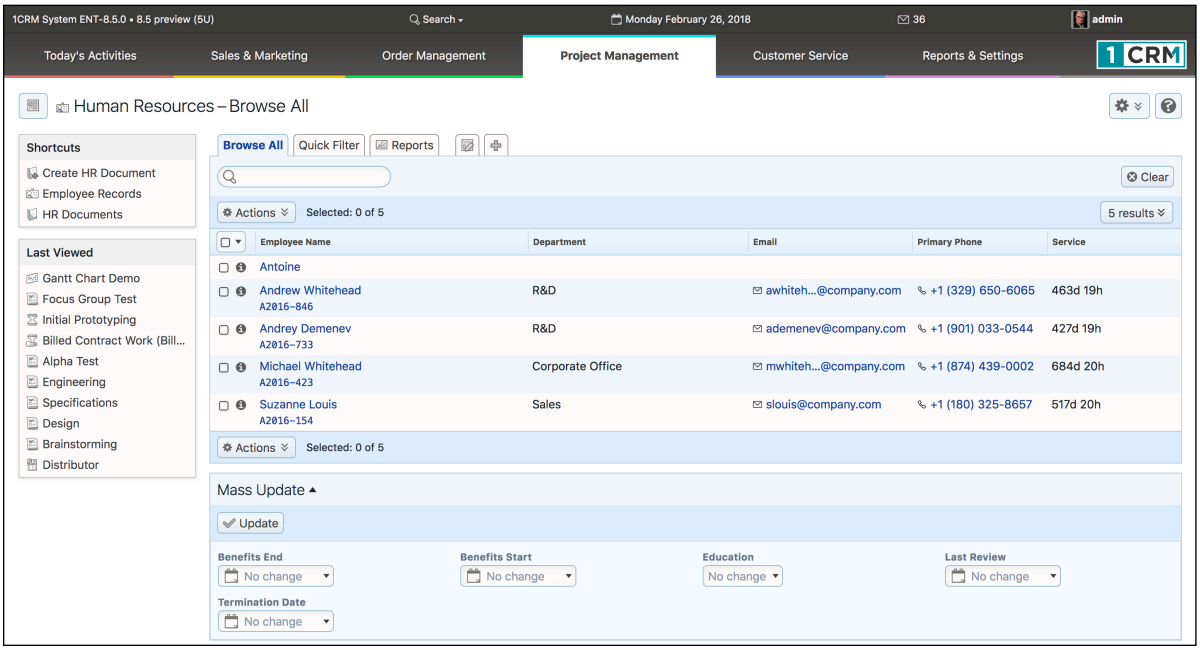


Figure 217: Human Resources Module, Employee Records View

The HR module keeps track of a broad range of information for each Employee, including Leave days (both Vacation and Sick days), dependants, and associated documents such as resume, job description, performance reviews, disciplinary notices, even medical records. Employee data also includes employee number, emergency contact information, SIN/SSN, salary, last review date, education, date of birth, home address, benefits start/end dates, and employment start/end dates.

The Human Resources module is an integral part of 1CRM, but since it deals with very sensitive information, the module is only visible to those Users with access to the Human Resources module assigned to them (by the Administrator) in their User profile.

An Employee is any User of 1CRM with *Show In Directory* checked in their User profile by the system Administrator. Not only are Employees shown in the Directory, but they have an HR file created for them which is viewed and managed via the Human Resources module. Users without this property might include an Admin User account which is not really a person, guest User accounts, or User accounts created for board members, advisors, contractors or consultants.

The Human Resources module has a Help icon on the title bar at the top of the main screen body, followed by a choice of layout tabs, and a list of all or selected Employees. The Employee list may be sorted by clicking on any column title which has the icon beside it. Clicking on a column title when it is already the highlighted sort column reverses the sort order.

The Employee list is paginated if it contains more items than may be listed on the display and controls are provided to go to the start or end of the list, or step to the next or previous page. Clicking on any Employee in the list displays the detail information for that Employee.

Note that new Employee records may not be created within the Human Resources module – they must first be created by the system Administrator as new Users within the User Management screen,

and have *Show In Directory* checked in their User profile. Then an HR file is created for them, which may be managed within the Human Resources module.

Navigation shortcuts are provided within the Human Resources module to switch back and forth between the Employee Records View, and the HR Document View, as well as to create a new HR Document.

7.2.1 HR Documents

Each Employee file may have associated with it a number of HR Documents. Examples of these documents might be an Employee's resume at the time of their employment application, their performance reviews, and perhaps other Documents such as career plans, complaints, and so on. Clearly, none of these Documents should be accessible via the regular Documents module. To keep these Documents confidential, the system marks any Documents added via the Human Resources module as HR Documents. These Documents are displayed within the regular Documents list view on an *HR Documents* layout tab, for users with access to these documents.

Some HR Documents are associated with a specific employee, while others are not. The capability of managing HR Documents which are not associated with a specific Employee is provided to store (and share between authorized Users) such documents as a Christmas bonus program, a down-sizing plan, an Employee option plan, etc… which relate to all or most employees, and not just one.

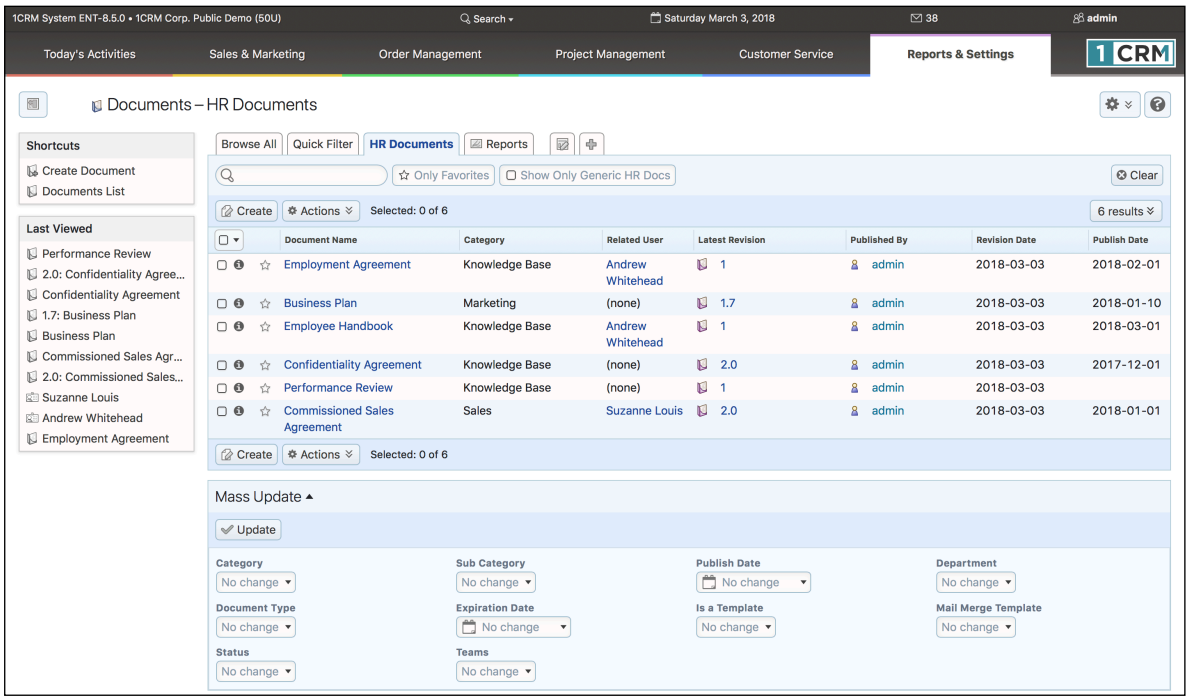


Figure 218: HR Documents View

As shown in the Figure above, the HR Documents layout tab and related shortcuts become integrated with the conventional Documents module, only for those Users with access to the HR module.

Also notice the *Related User* column, which shows if an HR Document is one linked specifically to one user's HR file. The filter control *Show Only Generic HR Docs* is used to hide HR Documents that have a related user, leaving only those HR Documents which are generic for all of HR - usually policy documents, or agreement templates, standard forms, etc...

Figure 219 below illustrates the scope of information kept in an Employee record:

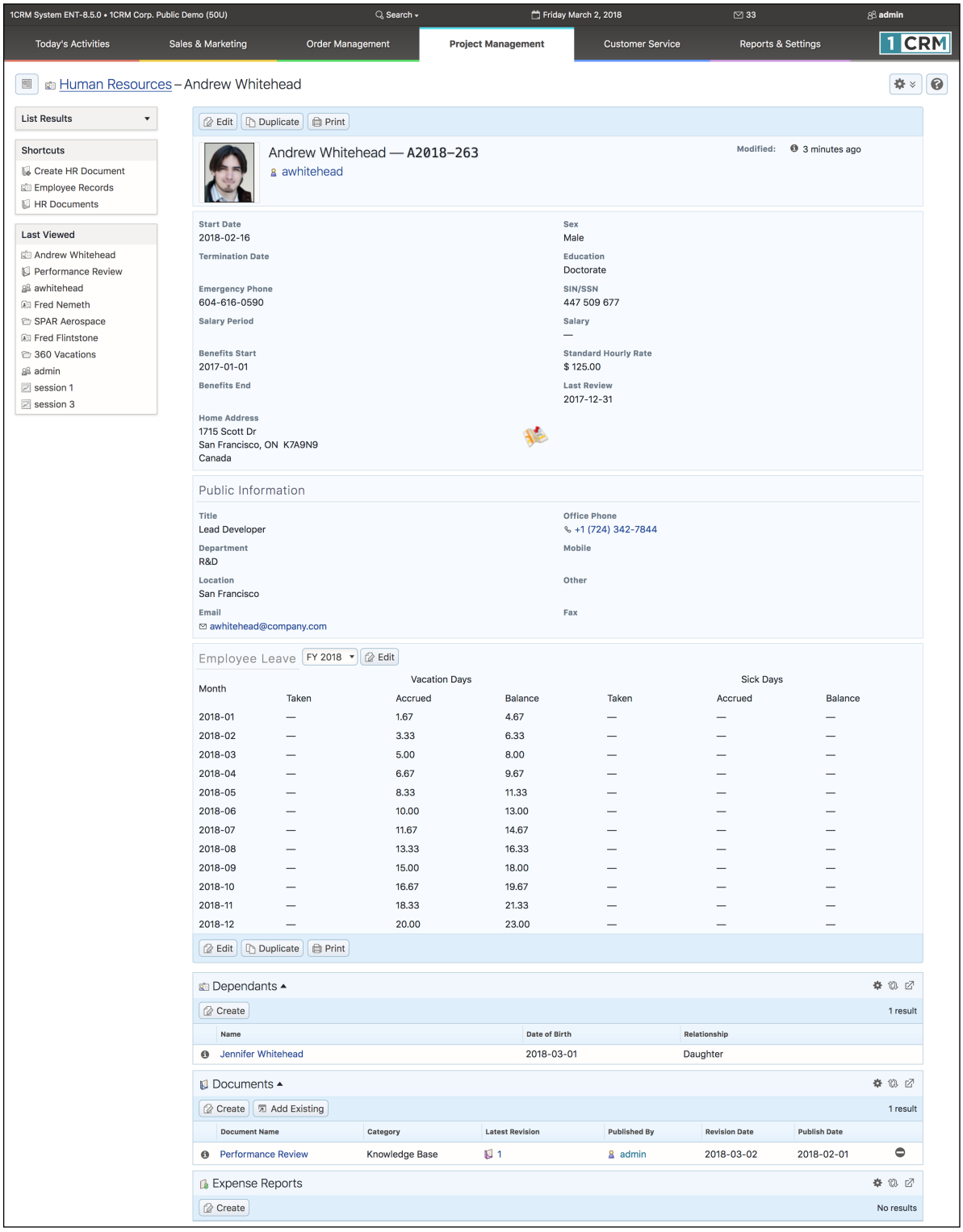


Figure 219: HR Detail View

7.3 The Booked Hours Module

Figure 220 shows the 1CRM screen with the Booked Hours Module selected:

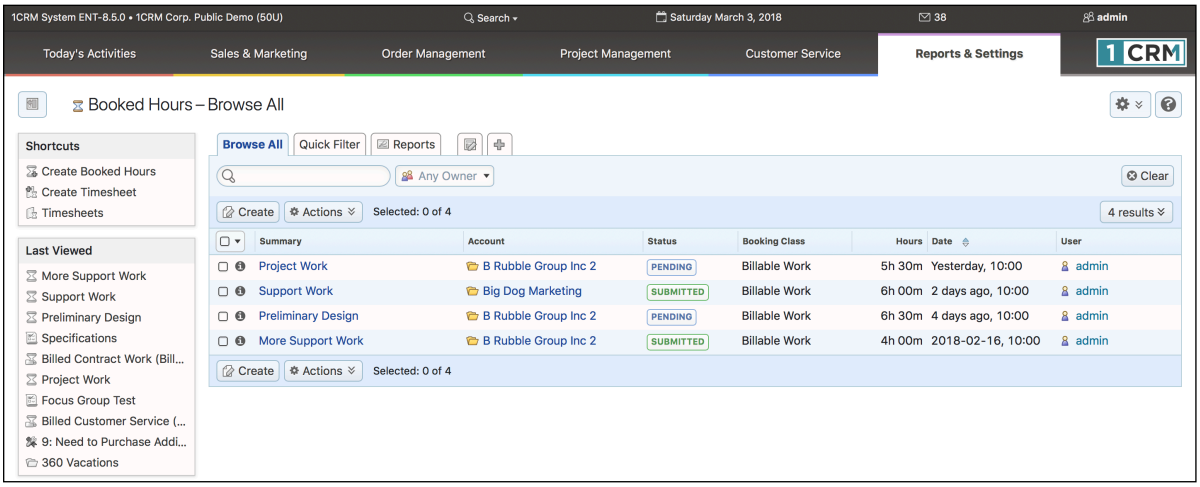


Figure 220: The Booked Hours Module

Many of the Booked Hours module's capabilities are described in the section on the Timesheets module, and you should read that section in conjunction with this one.

When employees spend their time on a customer Case or Project, your business may choose to have them record that time using the Booked Hours module. This helps a business to determine if such work is always being invoiced, and if the customer activities are profitable.

To create a Booked Hours entry, simply select the module, and then click on the *Create Booked Hours* shortcut. You will see a screen resembling this one:

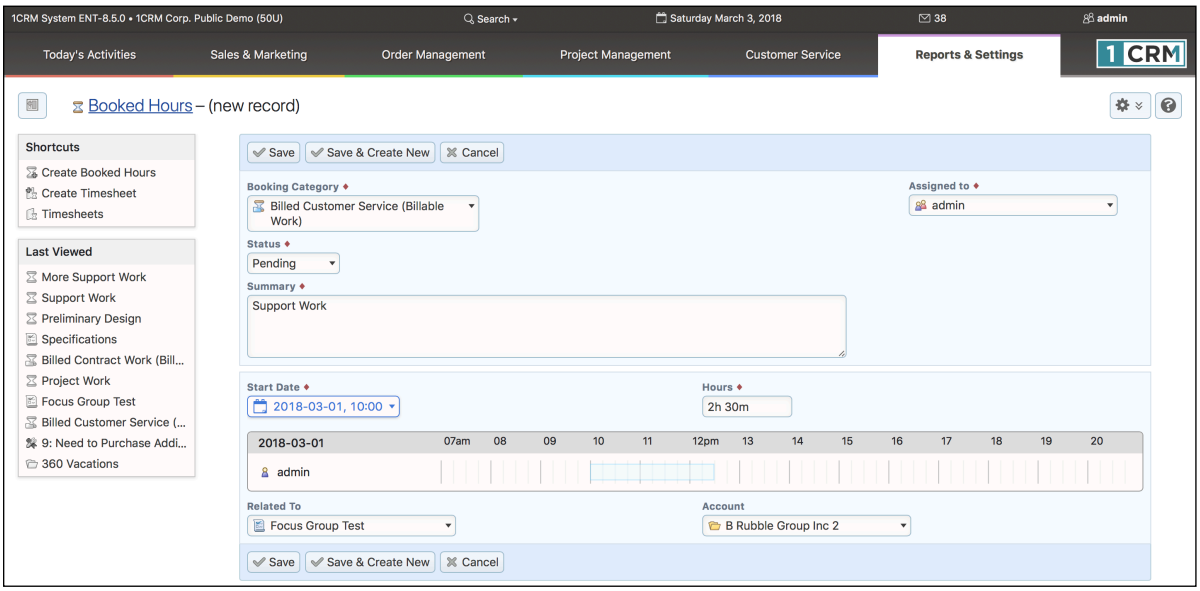


Figure 221: Entering New Hours

Now simply enter details of the work performed in the *Summary* field, set the *Start Date & Time* and enter the number of *Hours* worked. You will also need to select the *Booking Category* for these hours. The Booking Category determines how these hours will be treated - as billable customer hours, or as non-billable services, provided as part of support included with the sale of a product perhaps. The Booking Category will also control the rate at which the client is invoiced, and overall is a critical part of the business tracking how services employees time is spent.

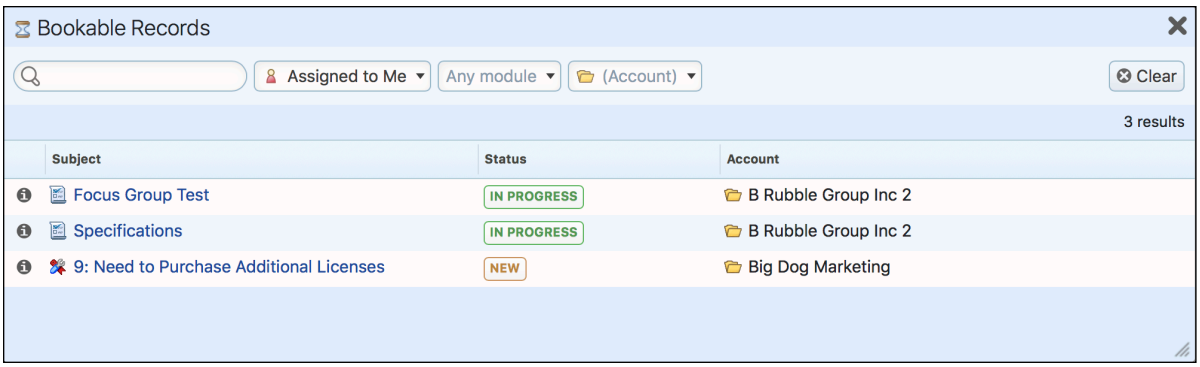


Figure 222: Selecting *Related To* Case/Project Task

Now choose the activity you are booking your time to, using the *Related To* lookup field. This will set the Account field as well. Listed on the screen displayed (see Figure above) will be a mix of all available Project tasks and service Cases to which you may book.

7.3.1 Booking Hours from Cases and Project Tasks

The example above illustrated how to create Booked Hours entries using the Booked Hours module directly. You may also create these entries using the Book Hours... button at the top of a Case or Project Task to which you may currently book your time. Which are these?

- Project Tasks for which you are an assigned resource, for which the Project status is *Active*, the Project Task status is *In Progress*, and your status as a resource on that Project Task is *Active*.
- Cases which are assigned to you, and whose status is *Active - New*, *Active - Assigned*, or *Pending*.

You may also book your time by clicking on the Create button on the Booked Hours sub-panel on Project Tasks or Cases which meet the conditions listed above.

7.3.2 Booking Hours from Calls, Meetings & Tasks

Booking hours to Project Tasks and Service Cases as shown above is useful because you want to track billable time to add to customer invoices for Cases and Projects.

However, it is also useful to be able to book hours to Calls, Meetings and (regular) Tasks. You do this in a similar fashion, using the Book Hours... button at the top of a Call, Meeting or Task. The Booked Hours that result will take their date/time and duration from the Call, Meeting or Task itself, which is very handy. Similarly the Summary text and related Account for the Booked Hours entry are set to the name and related Account of the Call, Meeting or Task. Simply choose a Booking Category, and *Save*.

Note: If the Call, Meeting or Task was linked to a Project Task or Case, then the *Related To* value for the Booked Hours will also link to that Project Task or Case. Otherwise you are free to set *Related To* as you prefer.

7.4 The Timesheets Module

Figure 223 shows the 1CRM screen with the Timesheets Module selected:

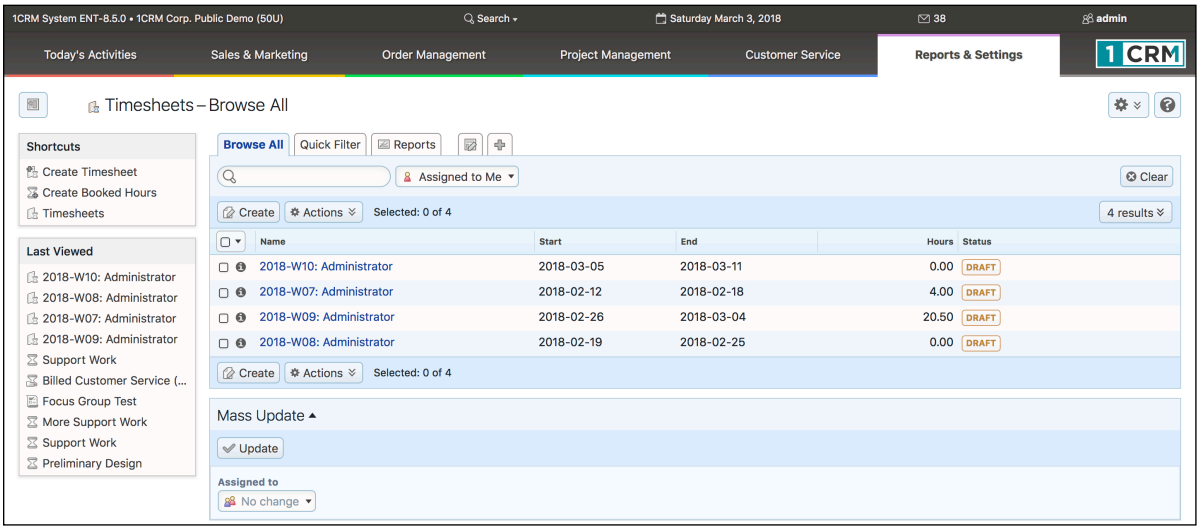


Figure 223: The Timesheets Module

Timesheets may be filed on a weekly, bi-weekly, semi-monthly, or monthly basis within 1CRM – as selected by a system-wide control in the Company Information section of the System Settings area within Administration. Timesheets have the status Draft, Submitted, Approved or Rejected. Timesheets are automatically named, with the format 2005-M01: User's Full Name. The letter M in the example denotes a monthly timesheet, and W, B, and S are used for the other timesheet periods. Each timesheet is specific to a single user, and has a start date and end date. Each timesheet may have any number of lines of booked hours on it.

It is important to understand that Booked Hours may be created for a time period for which there is as yet no Timesheet. The Timesheet itself may be created quite late in the process if desired, simply to put a wrapper around a set of Booked Hours, in order to submit them as a Timesheet for approval.

The Timesheets module has a Help icon on the title bar at the top of the main screen body, followed by a choice of layout tabs, and a list of all or selected Timesheets. Each Timesheet in the list has a check box at the left, and at the bottom of the screen is a Mass Update panel. The navigation shortcuts provided will help you create a new Timesheet, Create Booked Hours or switch back to the Timesheet list view.

The Timesheets list may be sorted by clicking on any column title that has the icon beside it. Clicking on a column title when it is already the highlighted sort column reverses the sort order. The Timesheets list is paginated if it contains more items than may be listed on the display and controls are provided to go to the start or end of the list, or step to the next or previous page. Clicking on any Timesheet in the list displays the detail information for that Timesheet.

When you create a new Timesheet (see Figure 224 below), all the Booked Hours you have entered for that time period will automatically appear in the *Other Booked Hours* sub-panel of the edit view screen. Each entry in the this sub-panel represents a Booked Hours record. These records may be created on a Project or Case detail view screen, in which case they may also be seen after they are created on the Booked Hours sub-panels of those Cases and Projects. They may also be created in the Timesheets mode of the Calendar - where they may be linked to Cases or Projects, or simply record day-to-day business activities.

Each Booked Hours entry in the sub-panels of a Timesheet records the following information, organized by the days within the timesheet period:

- The start time for the work performed
- The duration of the work, in hours
- The subject of the work (often used as a comment to describe the work when billing a client)
- The Case or Project to which the work is related (if any)
- The Status of the entry – Tentative, Not Yet Approved, Submitted, Approved, or Rejected

You include *Other Booked Hours* in your timesheet by clicking on the ✚ icon at the right of each entry. This 'promotes' the entry to the *Timesheet Booked Hours* panel from the *Other Booked Hours* panel. Similarly, you can demote entries using the ⊖ icon to the right of entries in the *Timesheet Booked Hours* panel.

Once you have added Booked Hours to your Timesheet, you can *Save* your Timesheet for now, and wait for the end of the Timesheet period before you *Submit* it for Approval.

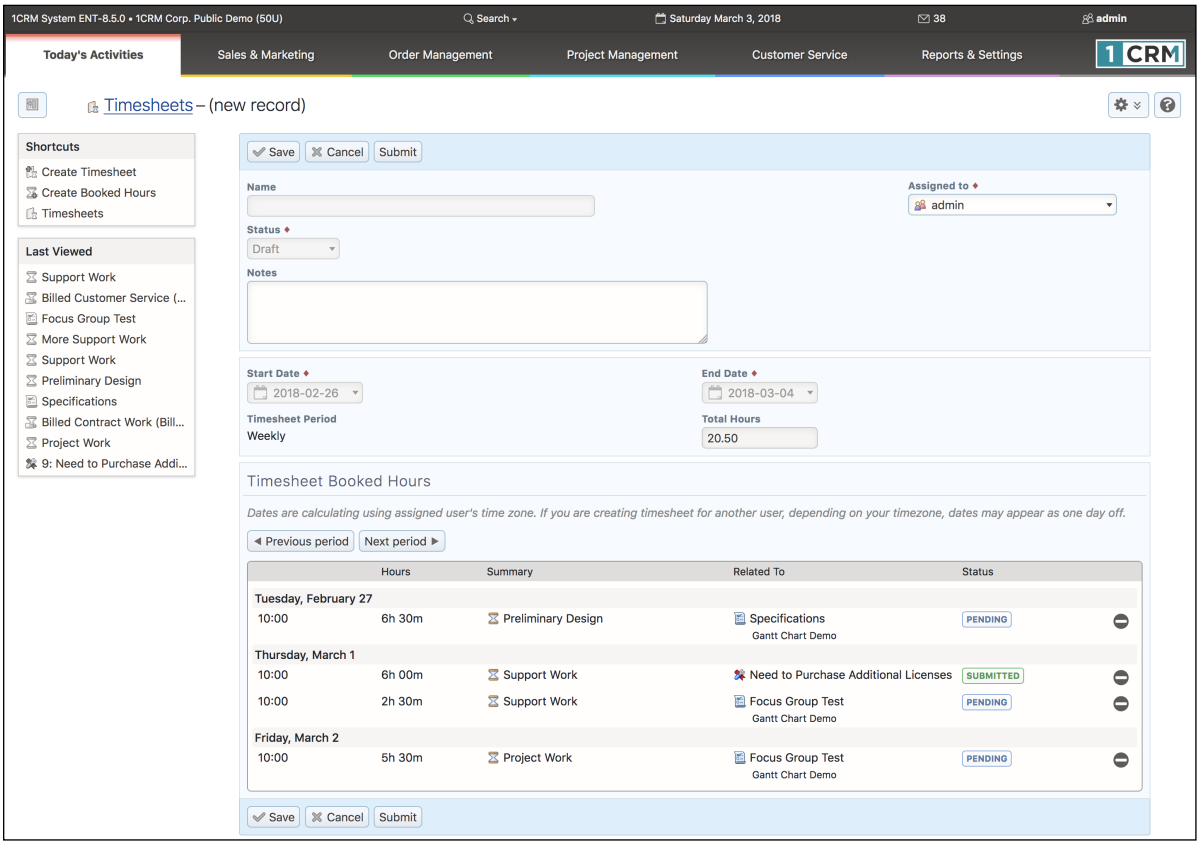


Figure 224: Timesheets Edit View

Once a timesheet is Submitted by the user (which is done by editing the timesheet and clicking on the *Submit* button), each line (or Booked Hours entry) may be Approved or Rejected. Once all lines of a timesheet are Approved, the timesheet as a whole becomes Approved. The approver has the buttons *Approve All*, *Reject All*, or *Approve Selected* available to them. If *Approve Selected* is used then the timesheet as a whole becomes Rejected, but the Approved lines are shown as Approved. (There are checkboxes to the left of each line, to select them.)

While hours are usually booked within the Timesheets mode of the Calendar, or by clicking on the Book Hours... button at the top of a Case or Project detail view, it is also possible to enter Booked Hours by clicking on the *Create Booked Hours* shortcut, available in the Timesheets module.

Things to watch for when using the booked hours features:

- You can only book hours to Project Tasks for which you are an assigned resource, for which the Project status is *Active*, the Project Task status is *In Progress*, and your status as a resource on that Project Task is *Active*
- You can only book hours to Cases which are assigned to you, and whose status is *Active - New*, *Active - Assigned*, or *Pending*
- No costs will accrue for the hours booked unless you have set a standard cost for the user in the HR module, or a task-specific cost for the user's role on that Project Task or Case
- Make sure to set the Billing Rate on the Booking Category, and to use a Booking Category that is classified as billable, or you will not be able to invoice for the work

A really handy feature of booked hours is that once they are approved, you can bill for the time spent on a Case or Project by simply going to the Invoices sub-panel on the Case or Project, and clicking on the *Create* button. A new Invoice will be created for the Account, and any billable hours that have not been previously invoiced will be added to the Invoice automatically. You will be left in edit mode on the Invoice, with the ability to add or remove line items or other details as desired. Then just *Save* the Invoice to bill for the time spent on that Case or Project.

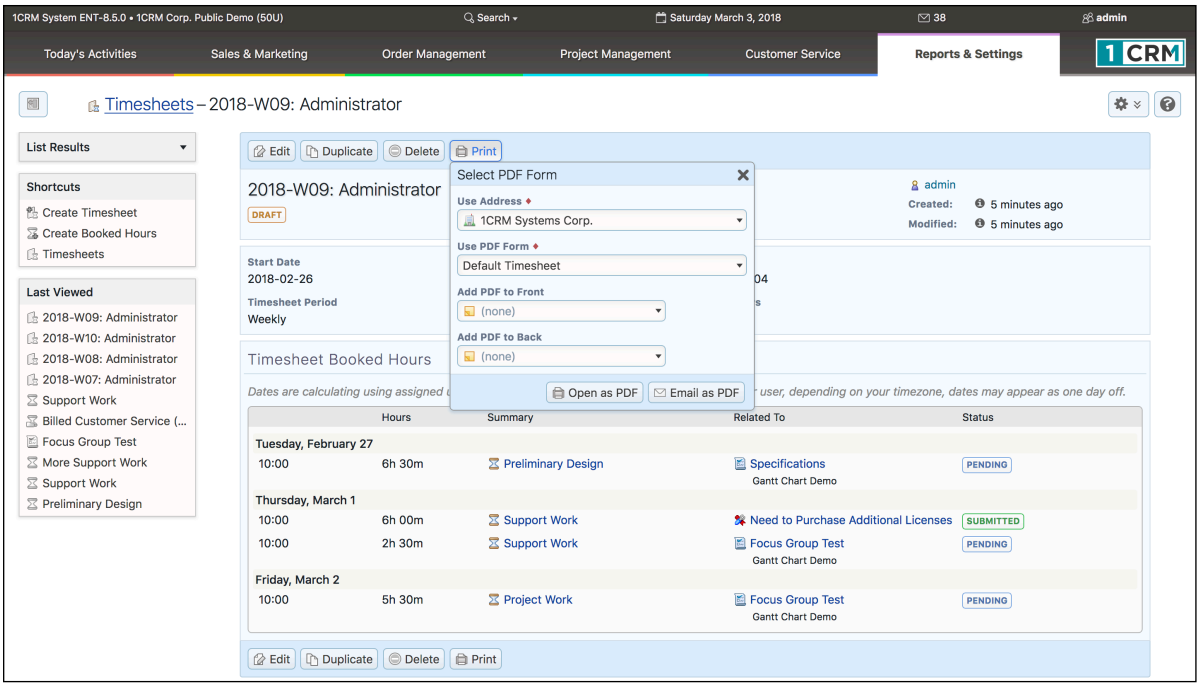


Figure 225: Timesheets Detail View

The *Print Timesheet PDF* option of the Print button on the Timesheet detail view (see Figure above) generates a Timesheet PDF. In some businesses these can be a useful part of the Timesheet approval workflow, and can also be useful when justifying client invoices.

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Timesheet

Employee	Administrator
Title	
Department	
Reports to	
Employee Number	
Period Start	2018-02-26
Period End	2018-03-04
Total Hours	20.5
Approval Status	Draft

Notes

Tuesday, February 27	Activity	Account	Day total: 6h 30m
10:00-16:30 (6h 30m)	Preliminary Design	B Rubble Group Inc 2	Project Task: Specifications
Thursday, March 1	**Activity**	**Account**	**Day total: 8h 30m**
10:00-16:00 (6h 00m)	Support Work	Big Dog Marketing	Case: Need to Purchase Additional Licenses
10:00-12:30 (2h 30m)	Support Work	B Rubble Group Inc 2	Project Task: Focus Group Test
Friday, March 2	**Activity**	**Account**	**Day total: 5h 30m**
10:00-15:30 (5h 30m)	Project Work	B Rubble Group Inc 2	Project Task: Focus Group Test

Timesheet Approved By

Timesheet	2018-W09: Administrator
Print Name	_____
Title	_____
Signature	_____
Date	_____

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Figure 226: Timesheet PDF

7.5 The Expense Reports Module

Figure 227 shows the 1CRM screen with the Expense Reports Module selected:

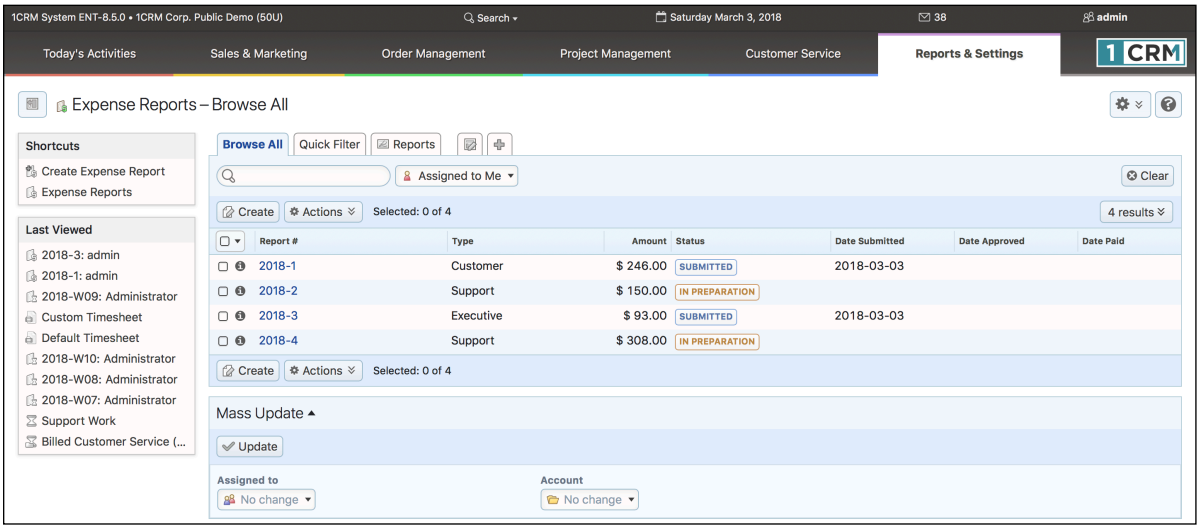


Figure 227: The Expense Reports Module

Expense Reports may be filed by employees at any time. They are used to record personal expenses incurred on the business' behalf, and to enable employees to claim those expenses back from the business.

Each Expense Report describes a series of receipts, which are added as line items to an Expense Report. Receipts may be handed in for approval as a physical stack of (numbered) receipts with a printed expense report, or may be scanned and uploaded to 1CRM, with each receipt linked to the corresponding line item on the Expense Report.

To create a new Expense Report, simply click on the *Create Expense Report* shortcut. You will see a screen similar to Figure 228 below.

- You can optionally select an Account to which the expenses should be linked, in the sense that these expenses were incurred in support of some company effort in this Account. This will help the business later on track Accounts that are incurring more or less than normal business expenses.
- Now select an Expense *Type* - from an initial set of values: *Customer*, *Marketing*, *Sales*, *Support* and *Executive*. These types are meant to help the business classify expenses as pre- or post-sales, for marketing, executive visits, etc..
- If you received an *Advance* from the business against your anticipated expenses, then enter the amount and currency of the Advance.
- Next select the *Report Currency* - the currency in which the expenses were incurred. Payments for Expense Report claims will always be made in the system default currency of the 1CRM installation, but the expenses themselves may have occurred in another currency. The exchange rate to be used for the currency conversion should also be entered (a default will be displayed, but will be editable).
- As receipts are added to the Expense Report, Total expenses will be displayed both in the currency in which they occurred, and in the currency in which they will be paid out. The Balance due to you net of the Advance will also be displayed, in both currencies.

- Finally enter some overall *Notes* for the reason the expenses were required to be incurred on behalf of the business. And optionally link an Opportunity, Project or service Case to the Expense Report - again for the benefit of later analysis.

Now you can click on the Add Receipt button to add your first receipted item to your Expense Report.

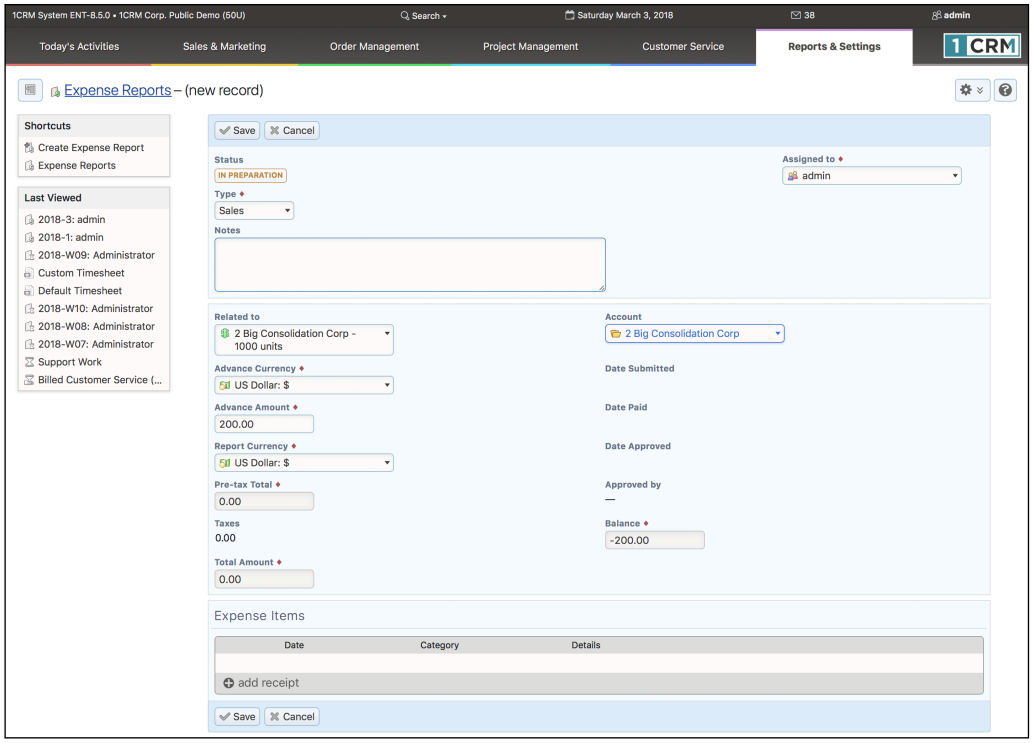


Figure 228: Creating an Expense Report

When you do so, you will see the Expense Items part of the screen start to resemble the Figure below. Each time you click on Add Receipt you can add a new line, which may be in the *Category Personal Auto Use*, *Auto Rental*, *Other Transportation*, *Meals*, Lodging, *Telephone*, *Other Utilities* or *Other Expenses*. Select a date, enter an amount, and type in a description, and the line is complete. For *Personal Auto Use*, the amount you enter will be the number of miles or kilometres travelled.

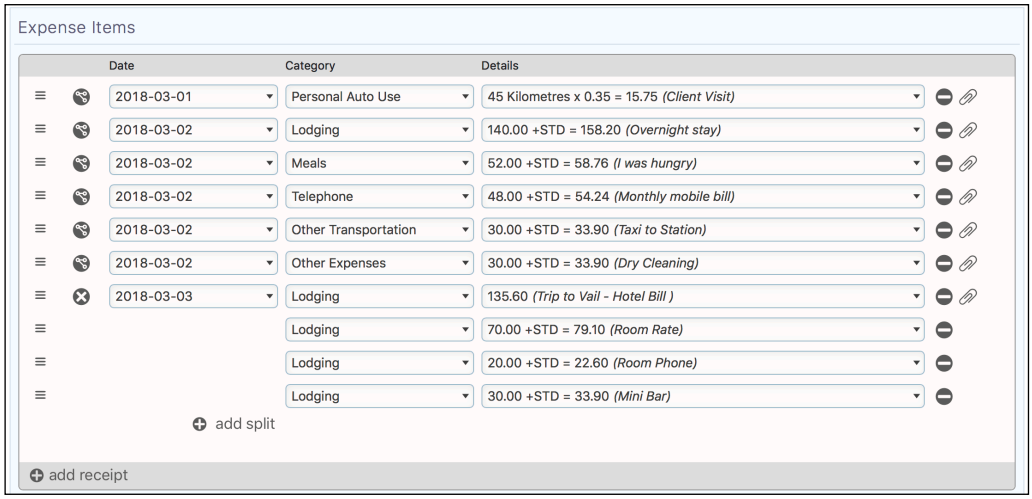


Figure 229: Adding Line Items to an Expense Report

Note: Your *Category* selection list is determined by the settings in Booking Categories. All Booking Categories with a Booking Class of Expenses will be shown on the dropdown list for Categories.

Optionally, you may click on the paperclip icon at the end of each receipt line to upload a scanned receipt for this item. When an Expense Report is saved, all the Scanned Receipts are listed in a sub-panel below the main panel, from which they may be edited or removed (see Figure 230).

Sometimes you will have a receipt which has several items on it, which need to go into multiple classifications (Hotels, Meals, Telephone, for example, as in the last item in the Figure above). In this case you use the *Split* button in front of the date to define a split. The indented lines are entered and then totalled automatically into the summary line above.

Once you have added all your receipt lines to the Expense Report, you can save it by clicking on *Save*, or Submit it for approval by clicking on Submit . When you save it, you see a screen like the Expense Report detail screen in the Figure below. (You can click on to see the split details.)

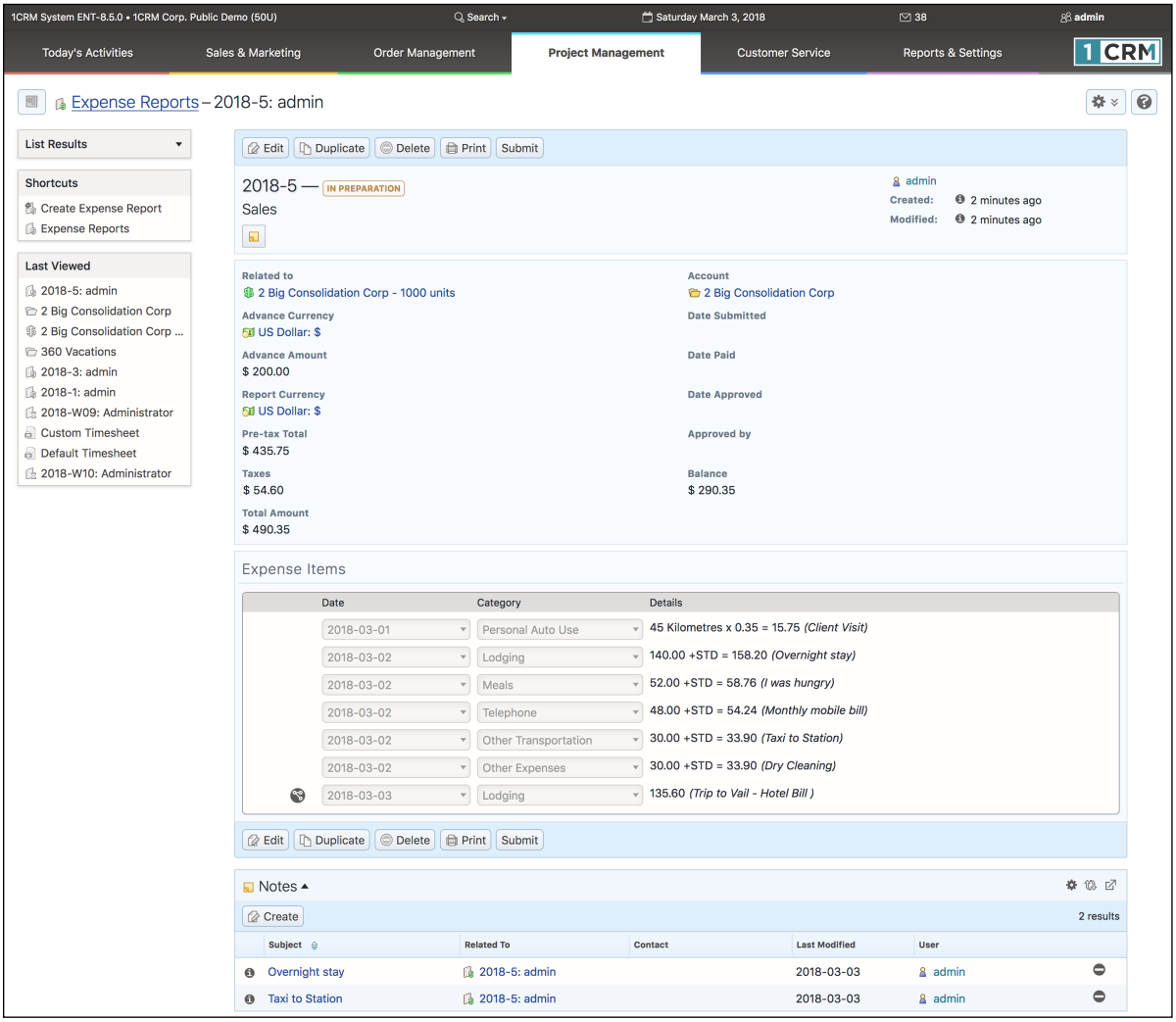
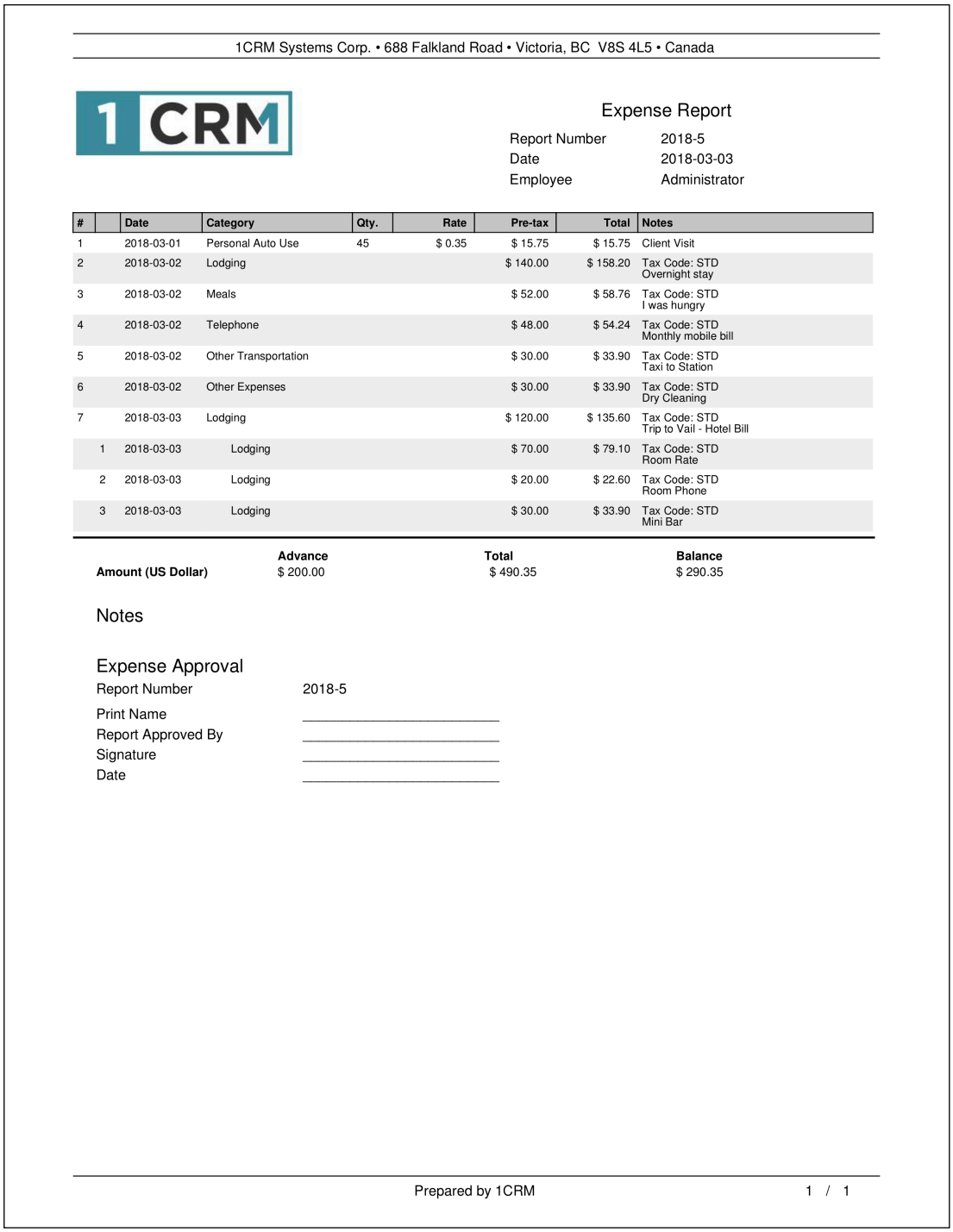


Figure 230: Expense Report Detail Screen

From the Expense Report detail screen, you can click on the Print button to produce a PDF of your Expense Report (see Figure 231), which you may print and submit for approval if that is how your business chooses to operate.

As well, from the Expense Report edit screen, you can click on the Submit button to submit your Expense Report for approval. This takes you to the Expense Report detail screen as does *Save*, but now your report has the status of being *Submitted*, and the *Date Submitted* is set. A *Submitted* Expense Report may be *Approved* or *Rejected* - there are buttons available on the detail screen for those users with Approval capability for Expenses in their Role. And once it has been *Approved*, it may later be marked as *Paid*. The dates an Expense Report is *Submitted*, *Approved* and *Paid* are tracked on the record.



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Expense Report

Report Number	2018-5
Date	2018-03-03
Employee	Administrator

#		Date	Category	Qty.	Rate	Pre-tax	Total	Notes
1		2018-03-01	Personal Auto Use	45	$ 0.35	$ 15.75	$ 15.75	Client Visit
2		2018-03-02	Lodging			$ 140.00	$ 158.20	Tax Code: STD Overnight stay
3		2018-03-02	Meals			$ 52.00	$ 58.76	Tax Code: STD I was hungry
4		2018-03-02	Telephone			$ 48.00	$ 54.24	Tax Code: STD Monthly mobile bill
5		2018-03-02	Other Transportation			$ 30.00	$ 33.90	Tax Code: STD Taxi to Station
6		2018-03-02	Other Expenses			$ 30.00	$ 33.90	Tax Code: STD Dry Cleaning
7		2018-03-03	Lodging			$ 120.00	$ 135.60	Tax Code: STD Trip to Vail - Hotel Bill
	1	2018-03-03	Lodging			$ 70.00	$ 79.10	Tax Code: STD Room Rate
	2	2018-03-03	Lodging			$ 20.00	$ 22.60	Tax Code: STD Room Phone
	3	2018-03-03	Lodging			$ 30.00	$ 33.90	Tax Code: STD Mini Bar

	Advance	Total	Balance
Amount (US Dollar)	$ 200.00	$ 490.35	$ 290.35

Notes

Expense Approval

Report Number 2018-5

Print Name _____

Report Approved By _____

Signature _____

Date _____

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Figure 231: Expense Report PDF

7.6 The Booking Categories Module

Figure 232 shows the 1CRM screen with the Booking Categories Module selected:

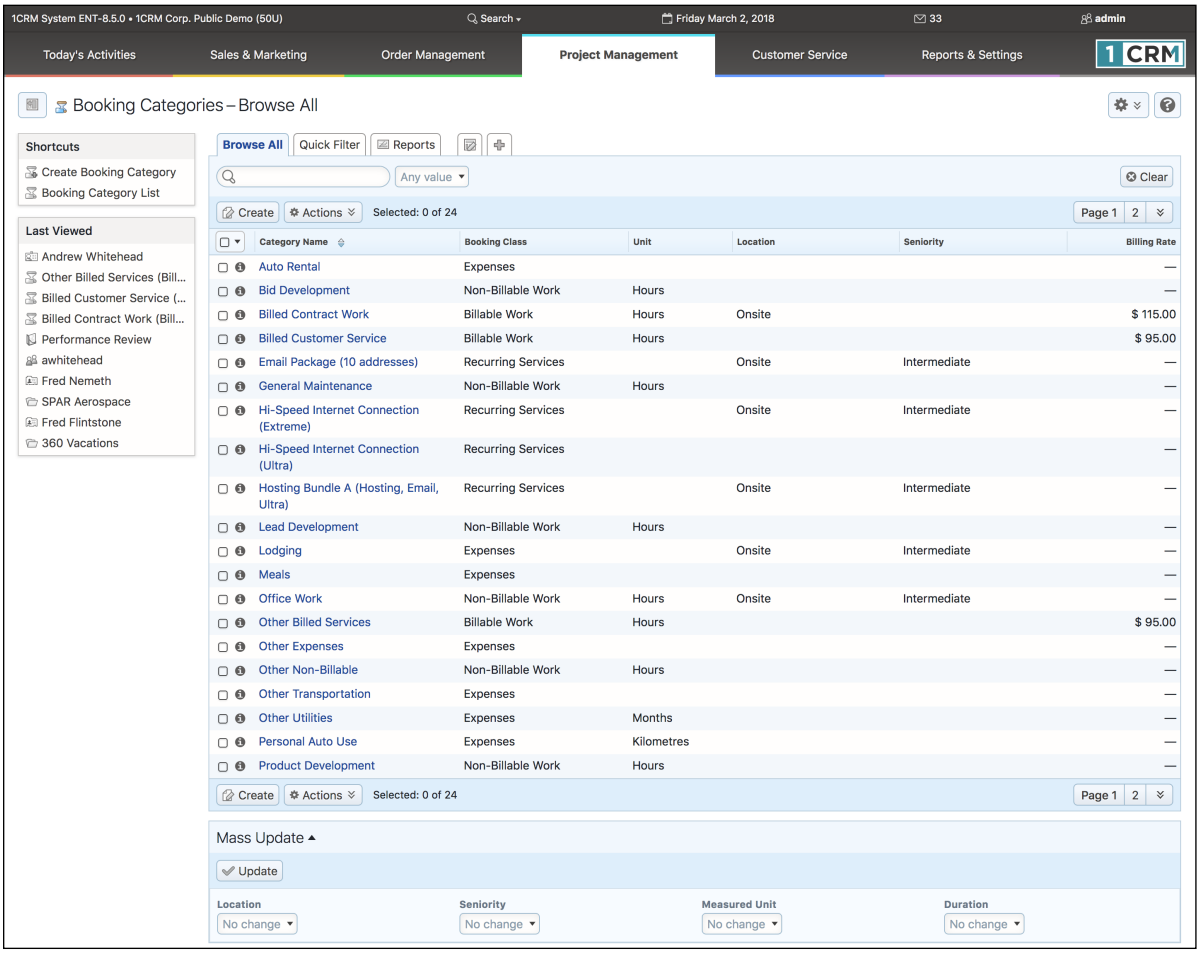


Figure 232: The Booking Categories Module

Booking Categories are a critical part of recording your time and expenses, as well as generating recurring invoices for Recurring Services. Each Booking Category has a Booking Class, and Booking Classes are fixed definitions which may not be changed. The options for Booking Class are:

- Billable Work
- Non-Billable Work
- Expenses
- Recurring Services

The first two of these are used when defining Booking Categories for booking time to a Project or service Case, and control whether that time will be invoiced or not, and if so at what rate.

As seen in the Figure below, if you create a new Booking Category with a Booking Class of *Billable Work*, fields are displayed for *Location*, *Seniority*, and *Duration*, as well as *Billing Rate, Currency* and *Tax Code* to be used for invoicing the work, and *Description*.

A Booking Category in the Booking Class of *Non-Billable Work* will display the same fields except that *Billing Rate, Currency* and *Tax Code* are not displayed.

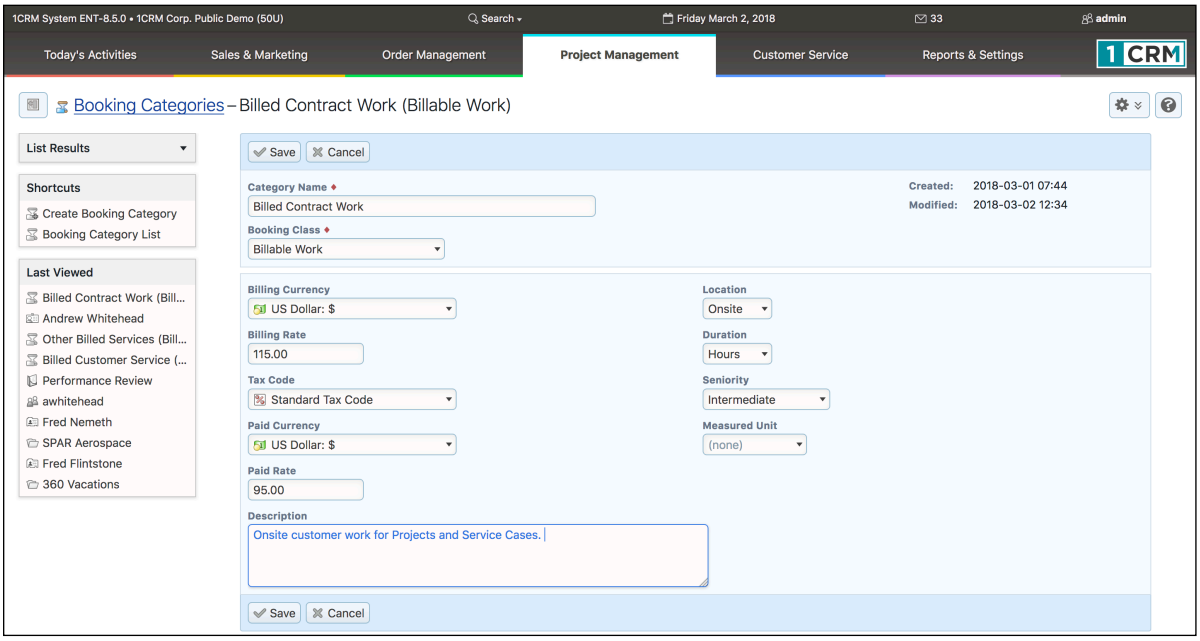


Figure 233: Creating a Booking Category for Billable Work

A Booking Category in the Booking Class of *Expenses* will display fields for *Measured Unit*, *Standard Rate*, and *Description*. *Measured Unit* is used for an expense such as *Personal Auto Use*, which may be measured in Miles or Kilometres. This is where an administrator would change the distance units if they are not correct for your business. *Standard Rate* is only used when a *Measured Unit* is specified. In the case of *Personal Auto Use* it would specify the expense rate per mile or kilometre to be paid to employees for using their own vehicle on company business.

A Booking Category in the Booking Class of *Recurring Services* just shows the *Category Name*, *Booking Class* and *Description*. These Booking Categories are used to describe the types of services your business offers as Recurring Services. For more details see the section in this Guide on *Recurring Services*.

8.0 Customer Service

8.1 The Service Subcontracts Module

Figure 234 shows the 1CRM screen with the Service Subcontracts Module selected:

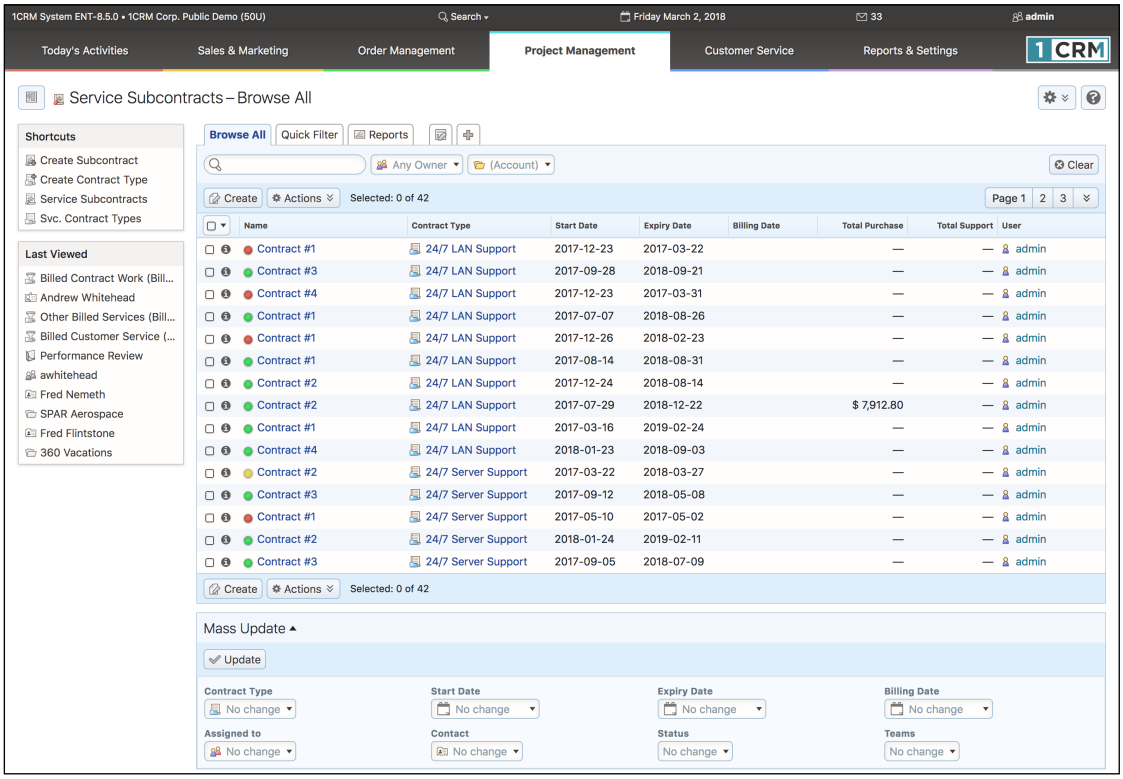


Figure 234: The Service Subcontracts Module

The Service Subcontracts module manages service subcontracts. On entry to the module, all service subcontracts are listed, with their associated Name and Contract Type, Start Date, Expiry Date and more. Each service subcontract can have any number of supported products associated with it for support coverage.

Each service subcontract has a start and end date, and is colour coded accordingly – Red for expired contracts, Yellow for contracts expiring in the next 30 days, and Green for active contracts. The Service Subcontracts module combines with the Supported Products, Cases and Software Bugs modules to provide a comprehensive service management capability.

The Service Subcontracts module has a Help icon on the title bar at the top of the main screen body, followed by a choice of layout tabs, and a list of all or selected Service Subcontracts. The service subcontract list may be sorted by clicking on any column title which has the icon beside it. Clicking on a column title when it is already the highlighted sort column reverses the sort order. Contracts are initially sorted by their Account name.

The service subcontract list is paginated if it contains more items than may be listed on the display, and controls are provided to go to the start or end of the list, or step to the next or previous page.

Clicking on the name for any service subcontract in the list displays the detail information for that subcontract. Clicking on the Account Name for any subcontract in the list links to the detailed information for that Account.

Navigation shortcuts are provided to create a new service contract, to switch back to the service subcontract list view, and to list Contract Types and create new ones. A Contract Type is a specific type of service subcontract – it has a name, a supplier, a description, and a response time. Examples might be an *On Site LAN Support* Contract, a *24/7 Server Support* Contract, a *9-5 Desktop Support* Contract, etc..

Note that the scheduler has a function that may be set to provide automated reminders of service subcontracts that are coming up for their renewal dates.

Some organizations allow their clients to make pre-payments for support contracts. To accommodate this sort of business workflow, 1CRM allows you to add prepaid amounts to a service subcontract. See the figure below, in which the Prepaid Amounts sub-panel on a subcontract shows a prepaid amount which has been added to the subcontract by clicking on the *Apply Credit* button on that sub-panel. Also see the Prepaid Balance field in the main panel of the subcontract.

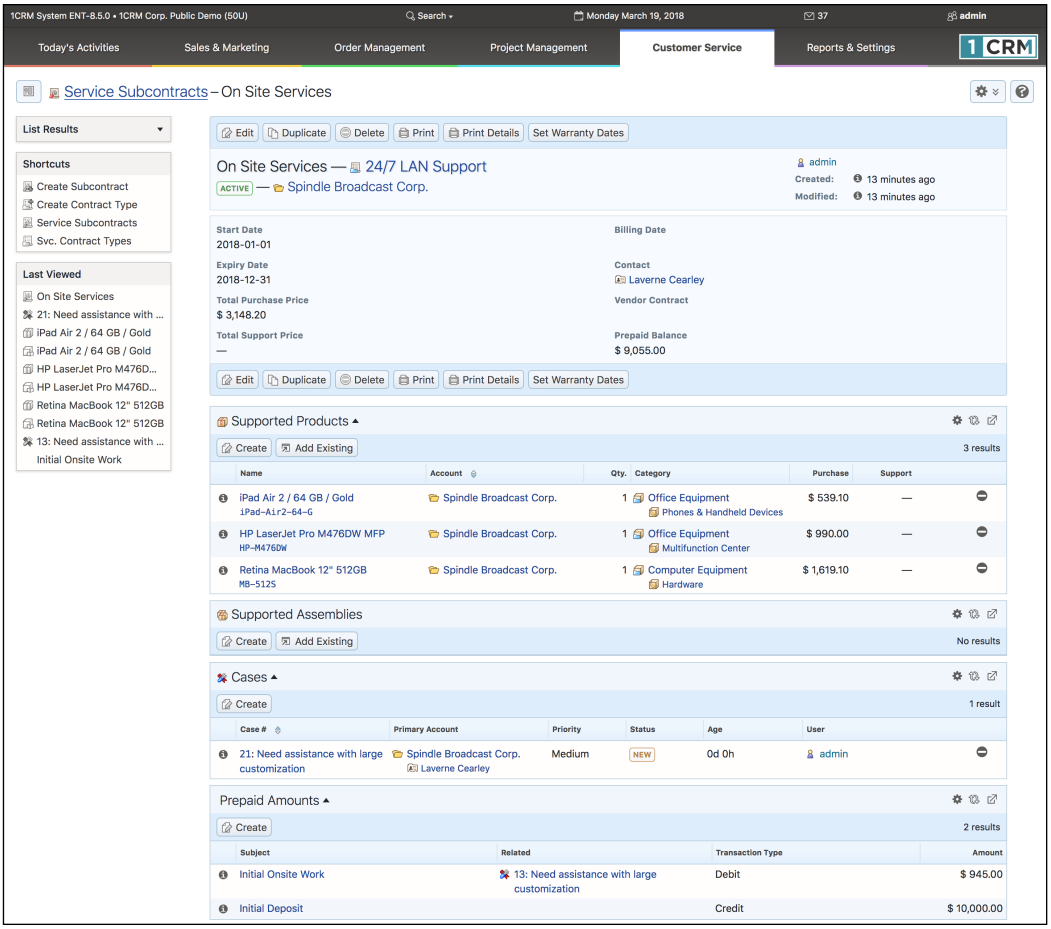


Figure 235: Service Subcontract and Pre-payments

Service Cases may be charged to the prepaid balance on a service subcontract by clicking on the *Apply Debit* button on the Applied Prepaid Amounts sub-panel of the Case detail view. The Prepaid Amounts sub-panel on a subcontract then lists all of its prepayment credits and debits, and the *Prepaid Balance* field will show the current balance of credits less debits. For more information please see the section that describes the 1CRM Cases module.

8.2 The Supported Products Module

Figure 236 shows the 1CRM screen with the Supported Products Module selected:

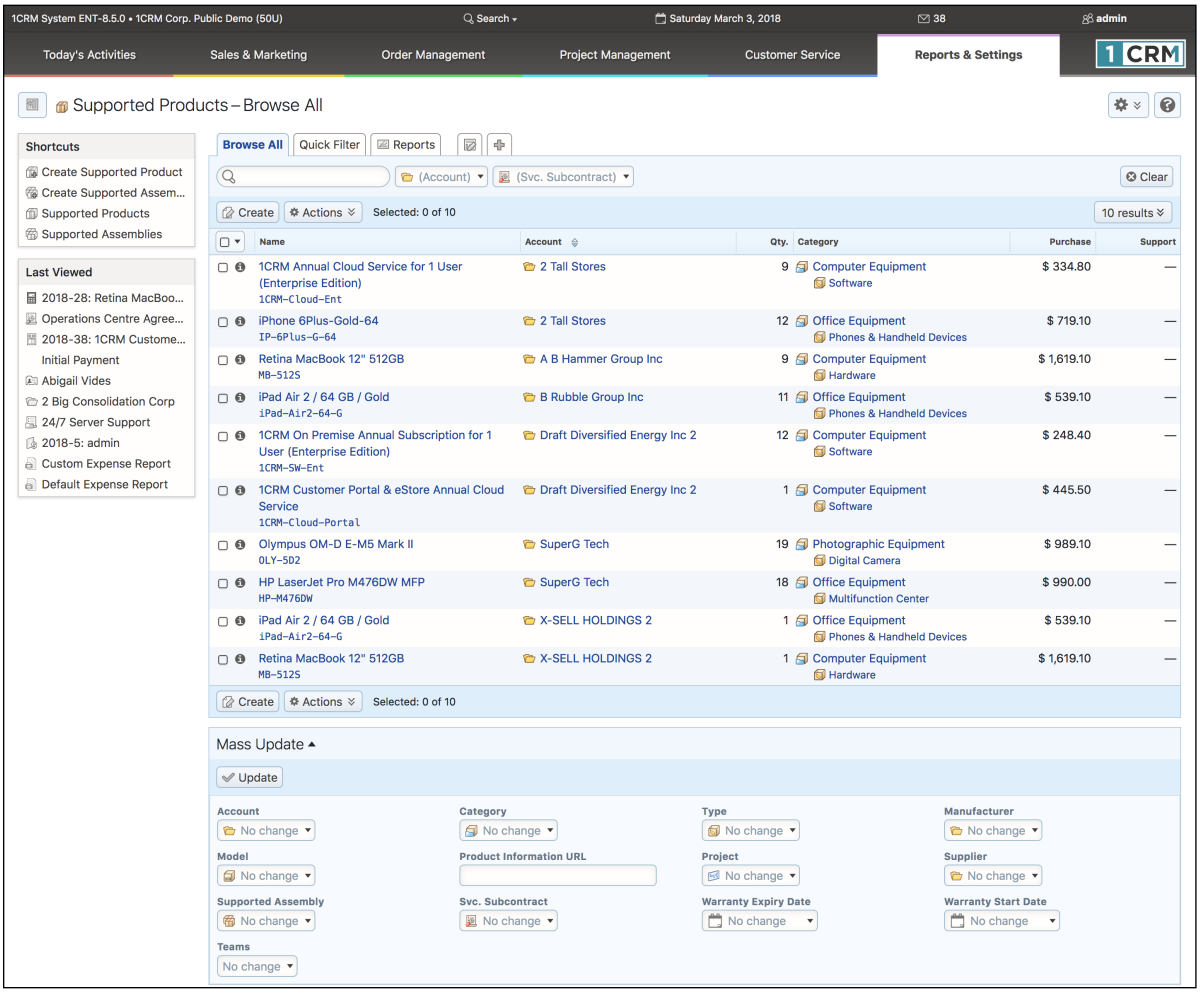


Figure 236: The Supported Products Module

Supported Products (a.k.a. *Assets*) are specific items that are associated with a Service contract. Take care not to confuse the Supported Products module with the Product Catalog module, which defines the Products that are available to be sold. Supported Products may be managed and organized by their Product Type and Category – and you can define all the Types and Categories you would like. Supported Products are also tracked by their Supplier. Suppliers are stored as Accounts, with the '*Is a Supplier*' checkbox selected.

A Supported Product may be created from an item in the Product Catalog, or may be created ad hoc by simply entering any name desired. Supported Products have a quantity associated with them, and have a sub-panel for related serial numbers.

The Supported Products module has a Help icon on the title bar at the top of the main screen body, followed by a choice of layout tabs, and a list of all or selected Supported Products. Each Supported Product in the list has a check box at the left, and at the bottom of the screen is a Mass Update panel to update one or more field values for all selected Supported Products.

The navigation shortcuts provided will help you create a new Supported Product, or switch back to the Supported Product list view. There are also shortcuts to create or list Supported Assemblies, and to import supported product data from a CSV file.

The Supported Products list may be sorted by clicking on any column title which has the ⬍ icon beside it. Clicking on a column title when it is already the highlighted sort column reverses the sort order. The Supported Products list is paginated if it contains more items than may be listed on the display and controls are provided to go to the start or end of the list, or step to the next or previous page. Clicking on any Supported Product in the list displays the detail information for that Supported Product. Clicking on the Account Name for a Supported Product links to the detailed information for that associated Account.

8.3 The Recurring Services Module

Figure 237 shows the 1CRM screen with the Recurring Services Module selected:

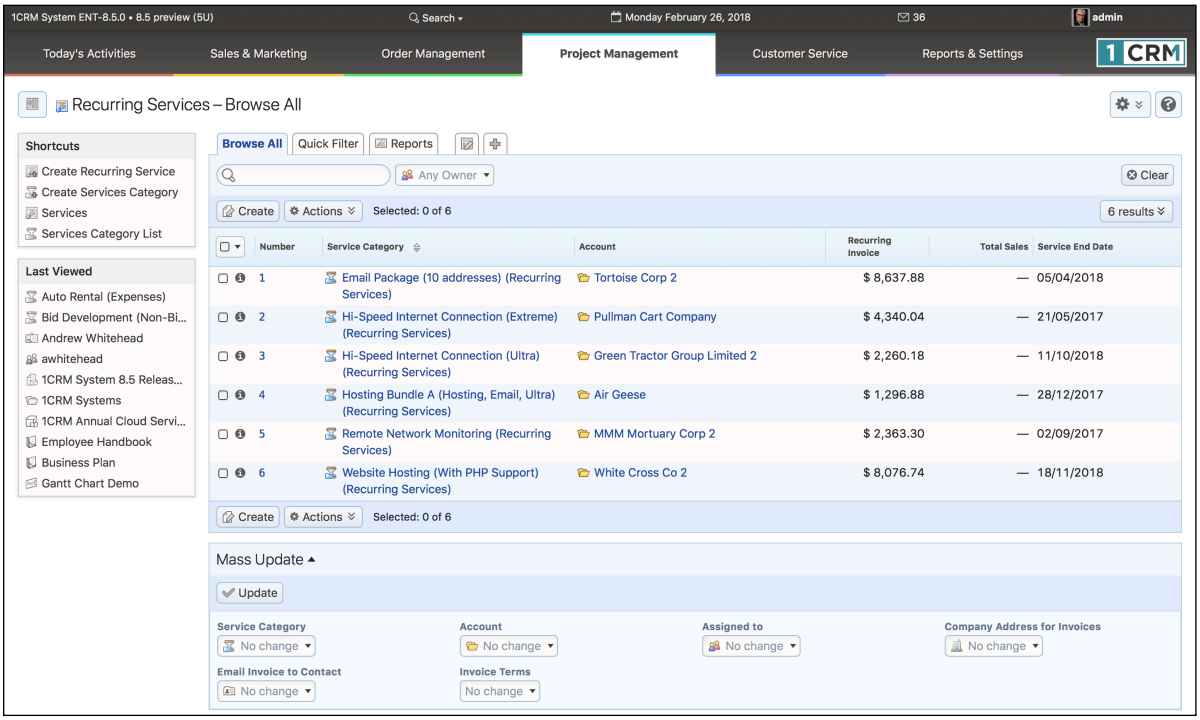


Figure 237: The Recurring Services Module

Recurring Services are just what they sound like - services for which you invoice on a regular basis. These could be services from an Internet provider, for a high speed connection, mail services, firewall protection, etc.. Or they could be for an apartment rental, equipment leasing, magazine subscription, hot-water heater, … any number of things.

You define a new Recurring Service by selecting the shortcut *Create Recurring Service*. This will bring up a screen which resembles the Figure below. But before you do, you will need a Services Category. These define the sorts of Recurring Services you offer. And you use the *Create Services Category* shortcut to create these.

Once you have created a few Services Categories, you define a Recurring Service as follows:

- Select the *Services Category*. (i.e. select which Recurring Service you are selling to a specific client.)
- Select the *Account* that is purchasing this recurring service.
- Select the *Quote Template*. This is a critical part of the process. The *Quote Template* will be used to set the contents of the Invoice to be created for this client each invoicing period. The Group names and lines items, tax settings, discounts, and total values from the Quote will be used on each invoice, as will the *Account* information. *Invoice Terms*, and *Purchase Order No.* will be set from the values specified here, however. As well, a *Note* will be added to each generated invoice specifying the service period covered by the invoice.
- Set the *Service Frequency*. This can be *Monthly*, *Quarterly* or *Annually*. This Recurring Service will generate an invoice for this account once each Month, once each Quarter, or once each Year.

- Set the *Service Start Date*. This will also set the *Billing Day* and (with the *Service Frequency*) the *Service End Date*. (***Note:*** Often a Recurring Service will start in the middle of the service period, or for some other reason have a duration that is not an exact number of service periods. Just for now we will assume that all Recurring Services are an exact number of service periods in duration. Information on how to manage exceptions to this is provided a bit later on.)
- Set the *Service End Date*. It defaults to a date of one year less a day after the *Service Start Date*. There are controls to change the *Service End Date* while ensuring the duration of the Recurring Service remains an exact number of service periods.
- Set the *Invoice Terms* and *Purchase Order No*. These will be used on all generated invoices.
- Select the *Email Invoice to Contact*. (Ensure that the Contact has an email address entered for them.)
- Select the *CC Email Invoice to User*. (Ensure that the User has an email address.)
- Then click on *Save*.

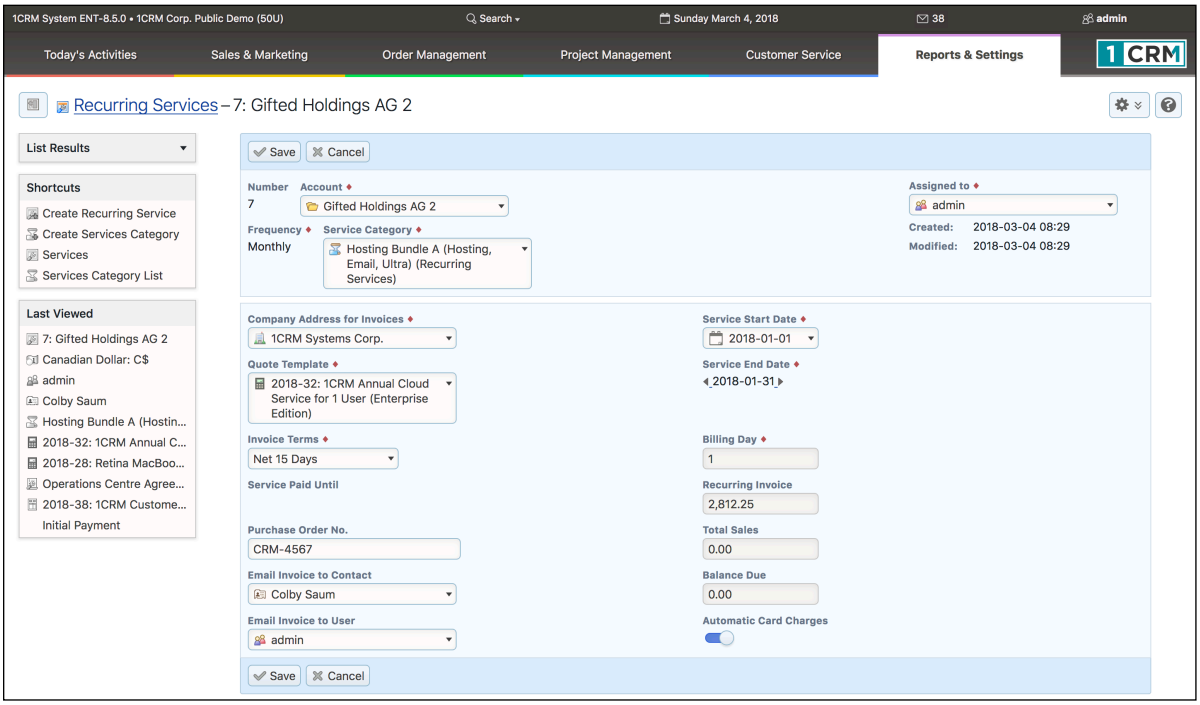


Figure 238: Creating a Recurring Service

And that's all there is to it!

In the Admin screens there is a scheduler task called *Send Recurring Services Invoices*. For Recurring Services invoices to be generated automatically, your Administrator must configure your scheduler, and enable this specific scheduler task with a run interval of one day.

8.3.1 Collecting Payment for Recurring Services

In the Figure above, note the checkbox *Automatic Card Charges*. This field is only shown if the *Stripe* payment gateway account has been configured in *Admin - Company Information*. If this checkbox is selected then the Recurring Service defined will not only generate and email an invoice on a recurring basis, it will also process the payment using the *authorized Credit Card* (see below) defined

for this account. The resulting email advice note will specify if the payment process was successful, or if the payment failed.

8.3.2 Authorizing a Credit Card

In order to automatically collect payment for Recurring Services invoices, you must add an Authorized credit card to the account to be invoiced. This process is analogous to the now old-fashioned process of *putting a credit card on file* for a client.

In the Figure below, note the button on the Account detail view *Authorize Credit Card*. This button is only shown if the *Stripe* payment gateway account has been configured in *Admin - Company Information*. When you click on this button you will see the *Authorize Credit Card* popup shown in the next Figure. Simply fill in the information required, and then click on *Authorize*.

One you have done this successfully, the Account now has a valid credit card on file within the Stripe system, and this card is available to charge Recurring Services invoices against it.

Note: No credit card information is retained within the 1CRM system.

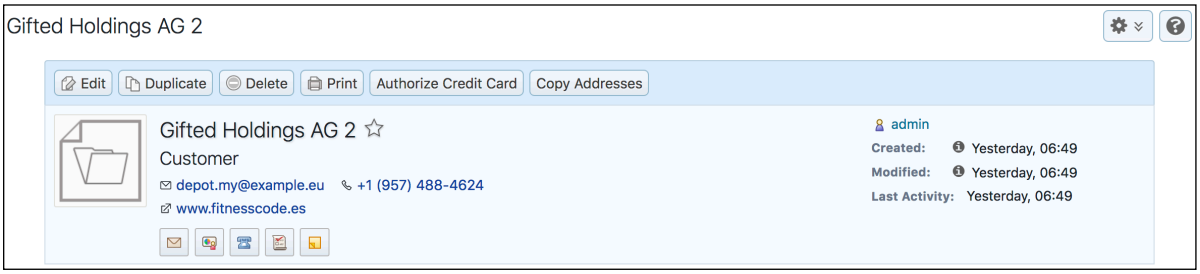


Figure 239: Authorize Credit Card Button on Account Detail View

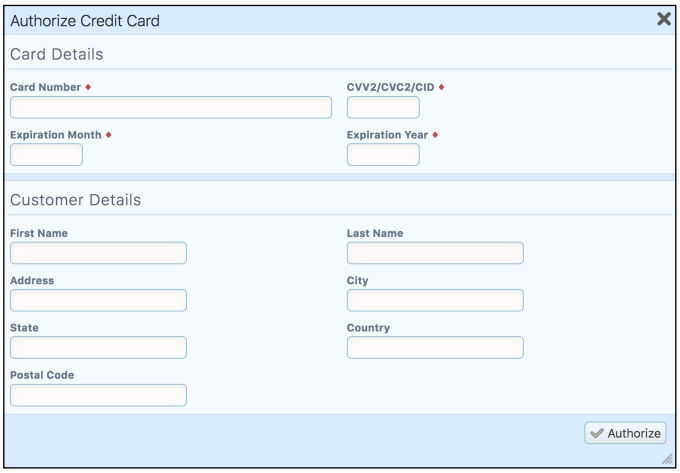


Figure 240: Authorize Credit Card Popup

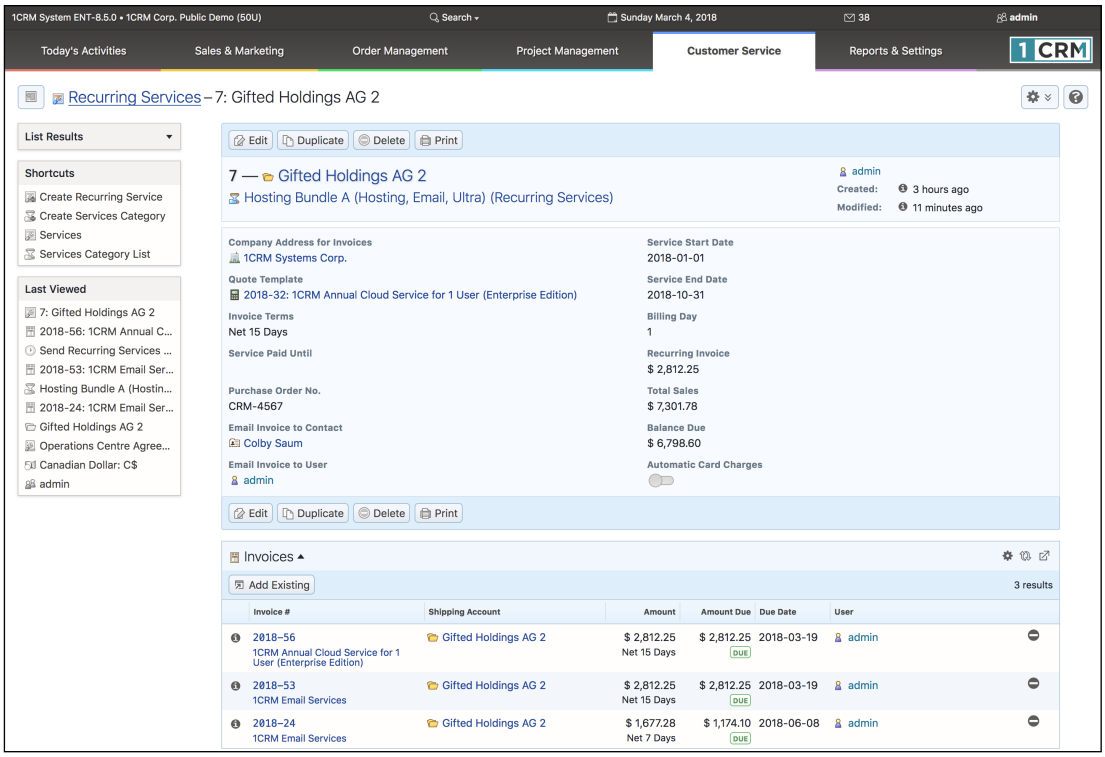


Figure 241: Recurring Service Detail Screen, Showing Invoices

1CRM will generate an invoice each service period on the *Billing Day*, and you will see these invoices gradually accumulate on the detail screen for each Recurring Service, in the Invoices sub-panel. As well, each new invoice will increase *Total Sales* and *Balance Due*. When payment is processed for one of these invoices, *Balance Due* is reduced, and the *Service Paid Until* date is adjusted.

Each Invoice generated will be emailed automatically to the Contact specified, and CC'd to the User specified. As well, 30 days before the expiration of the final service period, an expiration reminder email will also be emailed separately to both the Contact and User.

So far we have only discussed a recurring service with a duration of an exact number of service periods (Months, Quarters or Years), each with an identical invoice. But a recurring service sometimes has an initial invoice that is not the same as all the later invoices, due to some special initial setup charge or similar initial fee. Or the service may start mid-period and you prefer all agreements to end exactly at the end of a month, so the term of the agreement is not an exact number of service periods.

For both of these cases, you will need to do the following:

- Manually create an initial invoice using the Invoice module for the initial invoice that will not be like all the following invoices. This may be for the extra initial charges plus the first period's services, or just for the initial charges. Or it may be for the service for an odd length of time in an initial service period, so that all following periods' invoices are the same as each other (and so may be defined using a Quote Template).
- Link the manually-created invoice to the Recurring Service record using the Invoices sub-panel on its detail screen. Click on the *Add Existing* button there, find the invoice you just created, and select it. It will add to *Total Sales* and *Balance Due*.

To create a report of Recurring Services, there is an *Active Recurring Services* report, which lists and totals all Recurring Services still active, sorted by their start date.

8.4 The Cases Module

Figure 242 shows the 1CRM screen with the Cases Module selected:

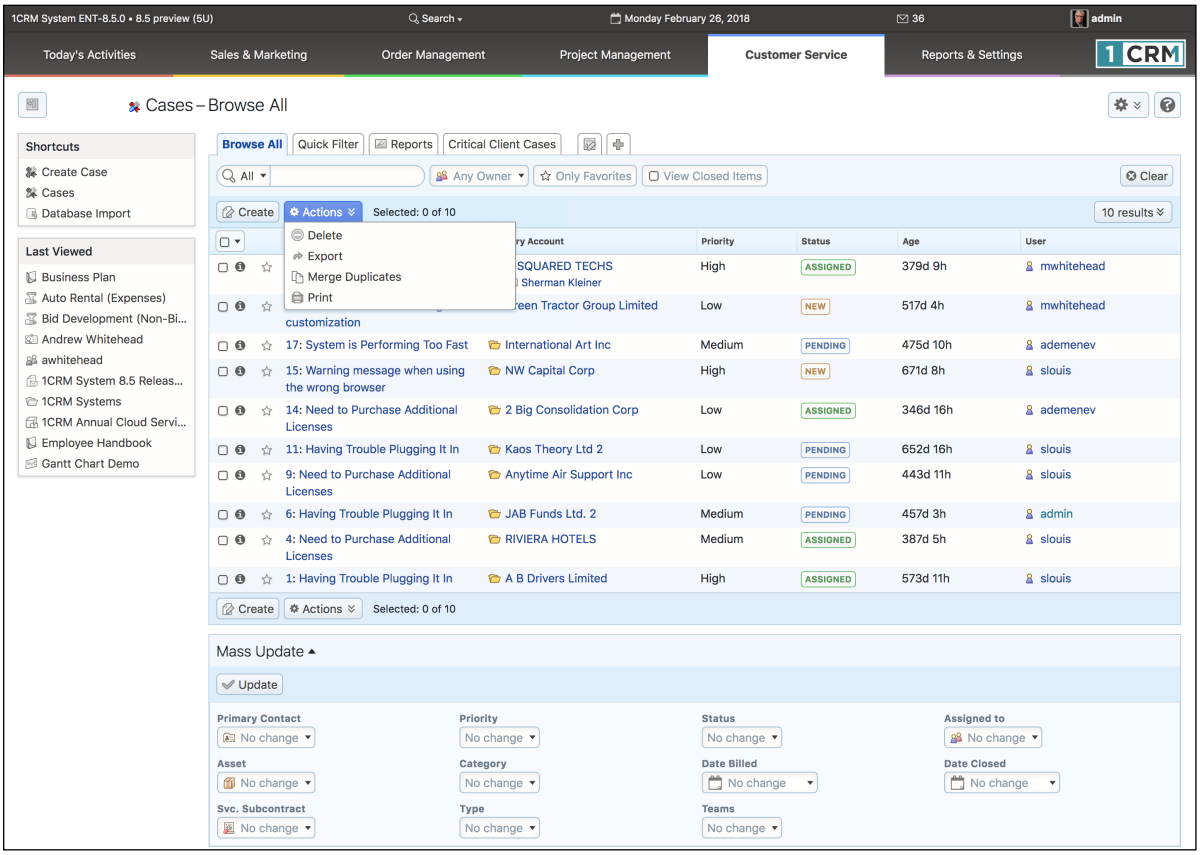


Figure 242: The Cases Module

Cases are issues or problems (also often known as Trouble Tickets) associated with an account. They may be managed and tracked through their life-cycle using the Cases module. Cases may be assigned *High, Medium* or *Low* priority. They have a status of Active - *New, Active – Assigned, Pending, Closed – Complete,* or *Closed – No Fault.* Each Case tracks the related service subcontract, and the description and serial number of any hardware asset involved in the Case.

The Cases module has a Help icon on the title bar at the top of the main screen body, followed by a choice of layout tabs, and a list of all or selected Cases. The *Browse All* layout tab can filter on Case Status, and has a default filter setting of showing only Active cases – which includes only those marked *Active – New*, or *Active – Assigned*.

The Cases list may be sorted by clicking on any column title that has the icon beside it. Clicking on a column title when it is already the highlighted sort column reverses the sort order. Cases are initially sorted by their Age (time and date now, less time and date of creation), with the oldest first.

The Cases list is paginated if it contains more items than may be listed on the display, and controls are provided to go to the start or end of the list, or step to the next or previous page. Clicking on the subject for any Case in the list displays the detail information for that Case. Clicking on the Account Name for a Case links to the detailed information for that Account. Navigation shortcuts are provided to create a new Case, or switch back to the Case list view.

8.4.1 Case Queue Workflow

While Cases may be created and assigned to users in much the same way as any other form of data within 1CRM, there is a special workflow available that is unique to the Cases module.

If in *Admin – System Settings* a Case Queue user is assigned (a person that will manage the list of outstanding service cases), then by default, all new cases created are assigned to that user. (When creating a new case, a user may, if desired, over-ride this default and assign the case directly to another user.)

When operating with a Case Queue user, a new *Get a Case* option is available on the Actions button at the top of Cases List View (see the Figure above) and the Cases Dashlet offers a Get a Case button. When a service technician clicks on this button, he will be assigned a case that matches his skill set. How does this magic happen?

1. Skills relevant to your business are defined on the *Admin – Users – Service Skills* screen. Each skill is simply entered as a name, and saved.
2. Each user may be rated by a system admin as to his or her skill level for each skill defined in the system. A skill level of 0 is assumed for any skills not given a level for any user. Skill levels must be positive integers. Most businesses define them in the range 1-3, 1-5, or 1-10. This rating is set for users with the *Admin – User Management* screen. Just select the profile for a user, edit it, and click on the *Add* button in the Service Skills section of the profile. Select the skill, enter a number for the skill level, and save the user profile.
3. Each new case may have defined on it the skills (and the levels of those skills) required to address the service case.
4. When the Get a Case button is clicked, the system automatically looks for the oldest and highest priority case available that matches the skill set of the requesting service technician.

Now, all of this may sound very interesting – but still many organizations may choose not to enable this workflow, as they are overloaded with service cases, and do not have the luxury of having a service tech request his next case. That being said, if your organization works that way, maybe you need some additional service technicians!

If a service technician requests a new case, and does not feel they can resolve it, they can elect to escalate the case. They do this by clicking on the Escalate button on the case detail view screen. This will cause a slide-out panel to appear, which asks the technician to check which skills they feel they are deficient in for this case. Then the case is re-rated for skills required, and put back into the service case queue.

8.4.2 Cases Notifications

Within 1CRM, there is a generic ability for email notifications to be sent when new items are assigned to users. This capability is controlled by the *Admin – Email & Notification Settings* screen. The *Notifications On* checkbox enables this feature. As well, each user must have the *Receive Email Notifications* checkbox selected on the *My Account* screen to receive these notifications. (The user must also have entered their proper email address in the *Email Address* field of the *Email Options* tab of the *My Account* screen.

Similar to the generic notifications capability, 1CRM has two special user notification capabilities for Cases. Again, they enabled by settings on the *Admin – Email & Notification Settings* screen. (*Notify Users on Case Creation?* and *Notify Users on Case Update?*) And again, each user must have the *Notify On Case Changes?* option selected on the *My Account* screen to receive these notifications.

But there is a key difference with these notifications, in that they may also be sent to your customers. Any contacts that are associated with a Case will receive an email notification when the Case (or any

related data) is updated if the options on the *Admin – Email Email & Settings* screen are selected. (The options are called *Notify Contacts on Case Creation?* and *Notify Contacts on Case Update?*)

This capability works very well with the 1CRM Customer Connection Portal. Clients may update a Case via the portal, and relevant users can receive an email to let them know. Conversely, when users update a case, clients can get an email prompting them to use the portal to see the update to their case.

8.4.3 Booking Time to Cases

Within 1CRM you have the ability to book time to Projects and Cases, and then invoice for that time if it is billable. As well, you can file Timesheets, and time booked to Cases or Projects will automatically appear on Timesheets for the periods within which the work was done.

To book time to a Case, simply click on the Book Hours... button at the top of the Case detail view screen, and a popup dialog box allows you to enter the information. Click on the *Save* button, and the time is booked. That time will be visible on the Booked Hours sub-panel of the Case, as well as on your timesheet. When Approved, it will be added into the *Time Used* and *Total Activity Time* for the Case.

Note: Cases must be assigned to you and Active for the Book Hours... button to be visible.

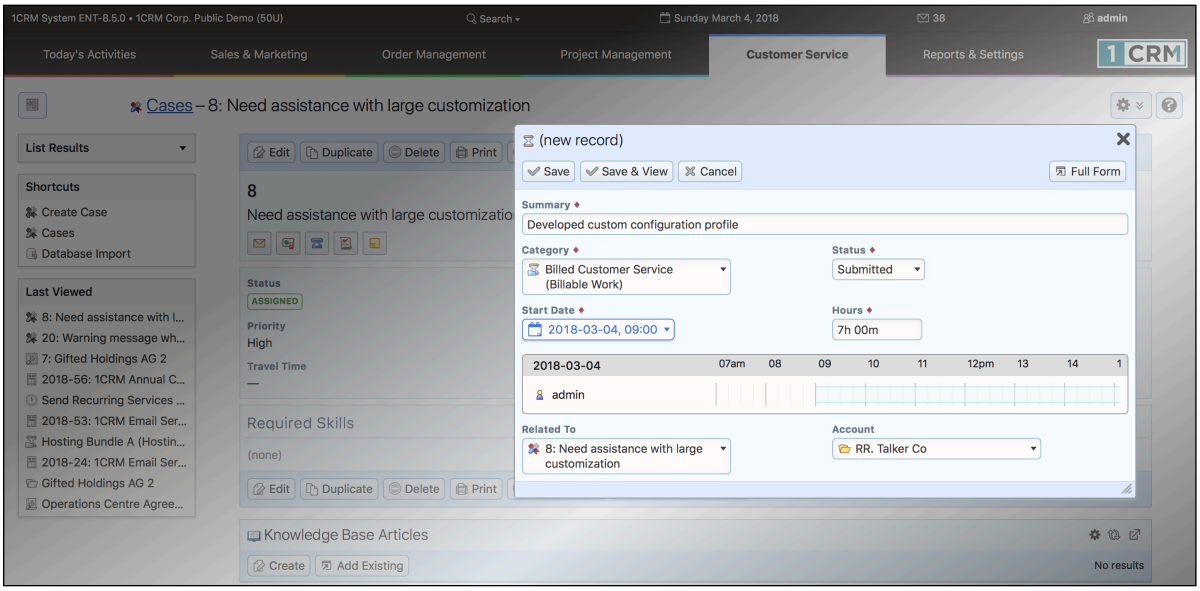


Figure 243: Booking Time to a Case

8.4.4 Using Service Parts on a Case

Within 1CRM you also have the ability to record the Service Parts you have used on a Case, and then invoice for those parts if they are billable. From the Case Detail view, simply scroll down to the Service Parts sub-panel, and Create a new entry. You can choose from all the parts in your Product Catalog. Users frequently define special Categories for Service Parts to make them easier to find and to reduce data entry errors.

8.4.5 Invoicing a Case

Once you have entered all the Booked Hours and Service Parts to a Case, you will eventually want to invoice for that Case. From the Case Detail view, simply scroll down to the Invoices sub-panel, and click on the Create button. A popup dialog will appear (see Figure below), allowing you to include or exclude any Products on the Invoice. Click on *Add Selected* for that popup, and you'll see another similar one for Services.

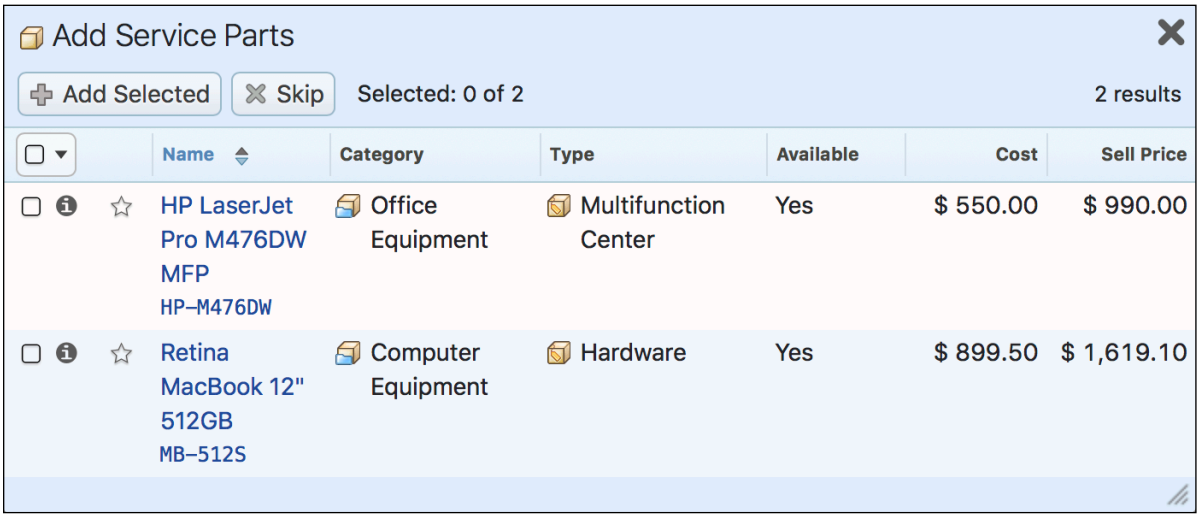


Figure 244: Adding Service Parts to a Case Invoice

After that, the Invoice Edit view will then come up on your screen (see Figure below), with a *Products* type Group for any Service Parts used on the Case, and a *Services* type Group for any Booked Hours used on the Case. You can edit the Invoice as desired, and then save it, produce a PDF, and send it to the client - as you would with any other Invoice in 1CRM.

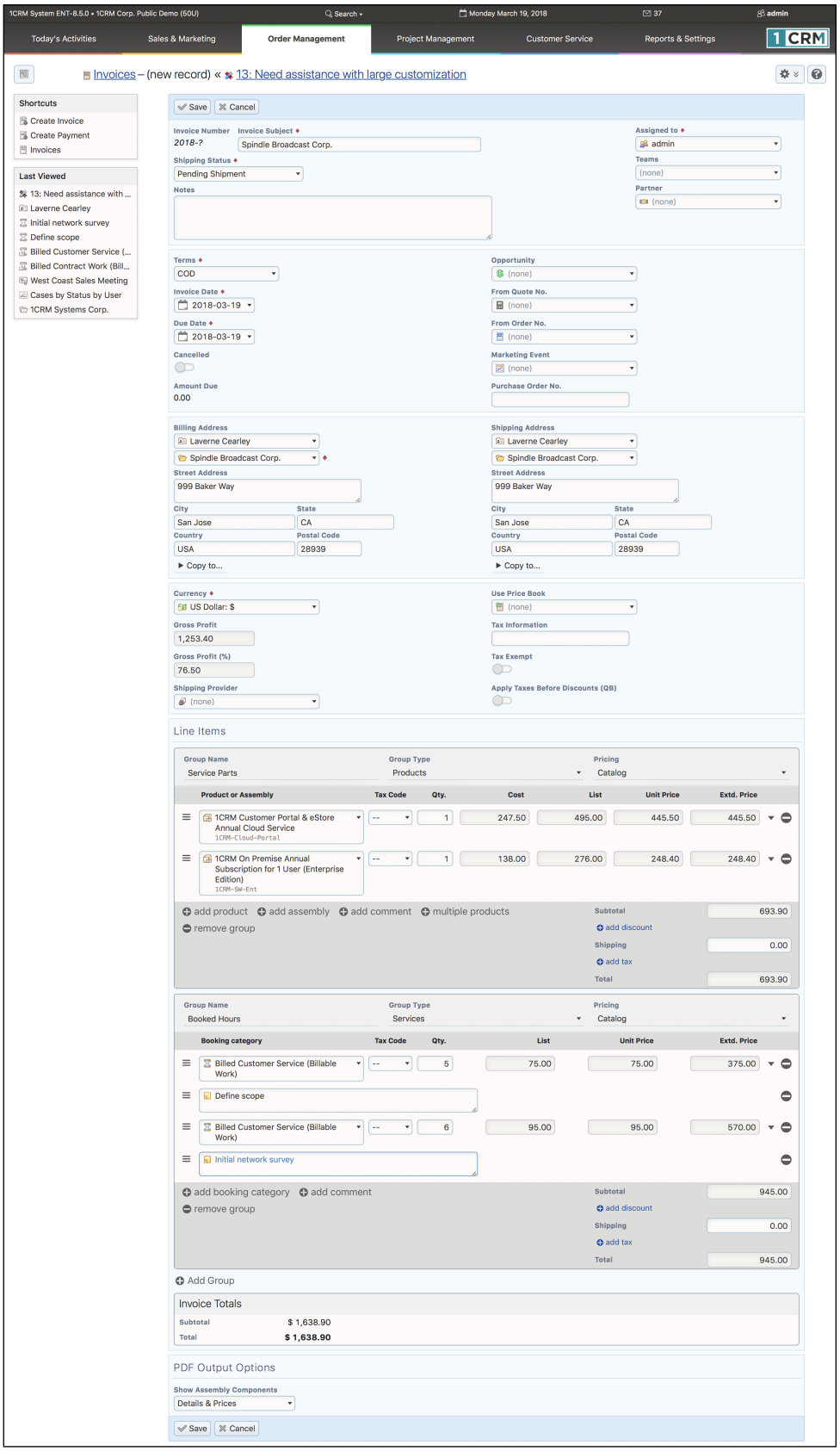


Figure 245: Invoicing a Case

8.4.6 Debiting Case Costs to a Subcontract Pre-payment

Rather than invoicing for a Case that has been completed, its cost can instead be debited to a service subcontract that has a prepaid credit balance. (***Note:*** You can see more on this topic in the section on Service Subcontracts.)

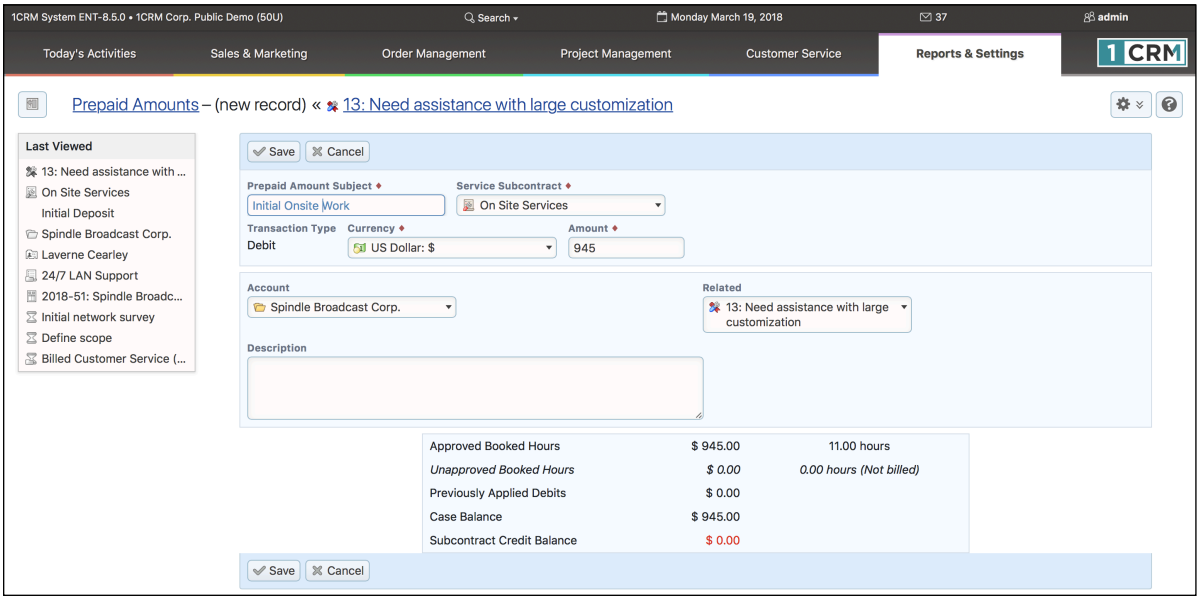


Figure 246: Debiting Case Costs to a Subcontract Pre-payment

The figure above shows the process in operation. On the Case detail view, on the *Applied Prepaid Amounts* sub-panel, you click on the *Apply Debit* button. The system will then display a screen like the one shown above. The mandatory amount field is calculated as the Amount Due on the Case from approved booked hours. The system checks that the credit balance on the support subcontract is sufficient to cover the amount due on the Case. Then you just need to enter some text for the *Prepaid Amount Subject* and click on the *Save* button.

The net result is that the booked hours are marked as paid, and the Case costs are debited to the prepaid balance on the service subcontract.

8.4.7 Email Interaction on a Case

When a service technician works on a service case, it often involves emailing back and forth with the client. 1CRM makes this an easy process - just click on the email icon in the top panel of the case, just below the case name and number to send an email to the client. (You can also click on the *Compose Email* button in the Activities sub-panel of the case.)

When you compose an email related to a case in this manner, you will see a screen like the Figure below. The email address is pre-filled (always make sure the Case has a *Primary Contact*, as this is where the email address comes from), and the email subject is also pre-filled with text in the format:

Re: <<Case Subject>> [Case ID#: xxx]

The email's *Related to* field will be set to link to the Case involved, and the email's *Account* field will link to the Account related to the Case. Already this feature has saved you a lot of running around setting these fields, but there are two more nice features involved here.

1. When you email the client, they often will reply back to you. When they do, usually they will not edit the subject line on the email - so when the reply comes back into 1CRM, the special

text in the subject line [Case ID#: xxx] will still be there. And 1CRM checks all incoming emails for this Case ID information, and if it finds it, the email will automatically be linked to the case involved (in addition to the Contact and their Account, as usual for all emails). In turn this can trigger the Case as having received an update, and the related user can be automatically notified, or a workflow triggered!

2. On the screen below you also see the *New Case Status* field. By default, *New Case Status* is set to *Pending*, so your case status will be set to *Pending* while you wait for a reply back from the client, but you can choose another status setting if you prefer. And as you see on the form below, you can also enter information into the *Case Resolution* field of the case involved.

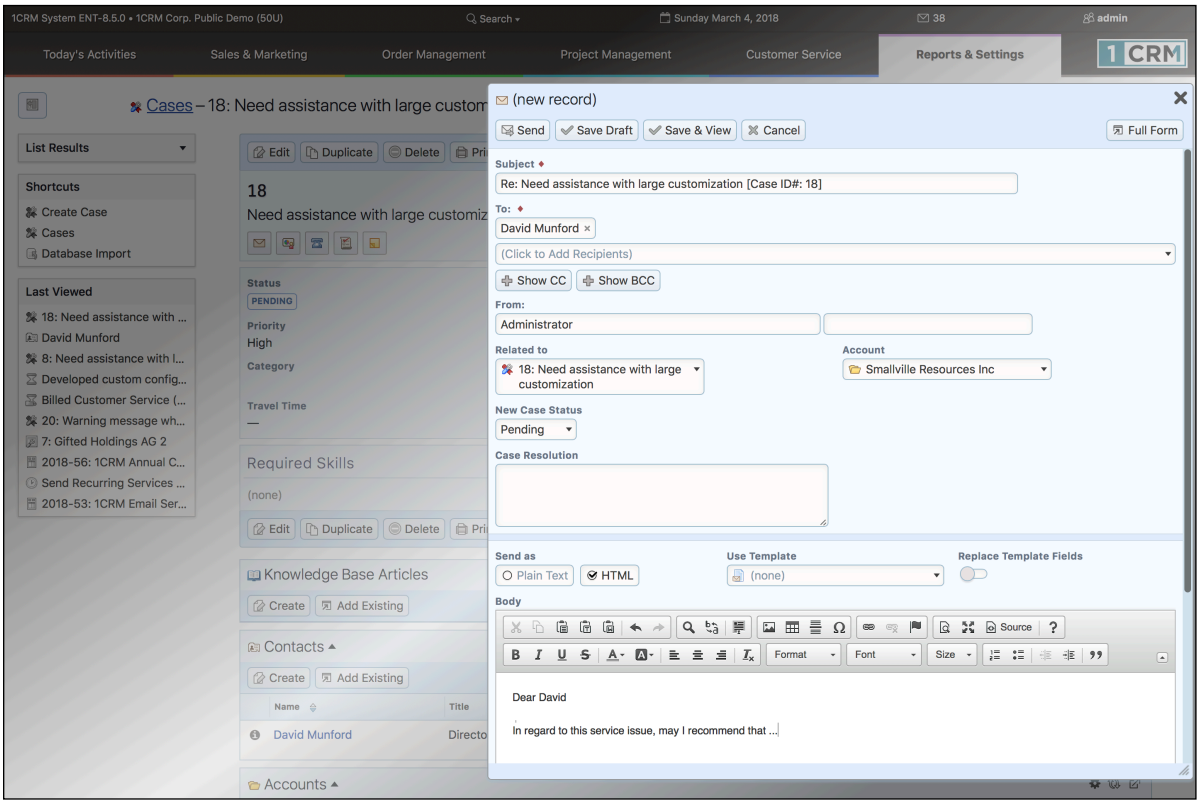


Figure 247: Sending an Email Linked to a Case

If your 1CRM system has *Case Auto-Close* enabled on the *Admin - Company Information* screen, then the case will automatically be closed (set to status of *Closed - Expired*) after the selected number of days of Inactivity after being set to *Pending* status. So now you don't have to keep reviewing *Pending* cases to see if they should be closed due to being *Pending* for too long.

All in all, if you look back over this section, you see quite a few common tasks involved in case management are made much easier for you, or completely automatic, by 1CRM.

8.5 The Software Bugs Module

Figure 248 shows the 1CRM screen with the Software Bugs module selected:

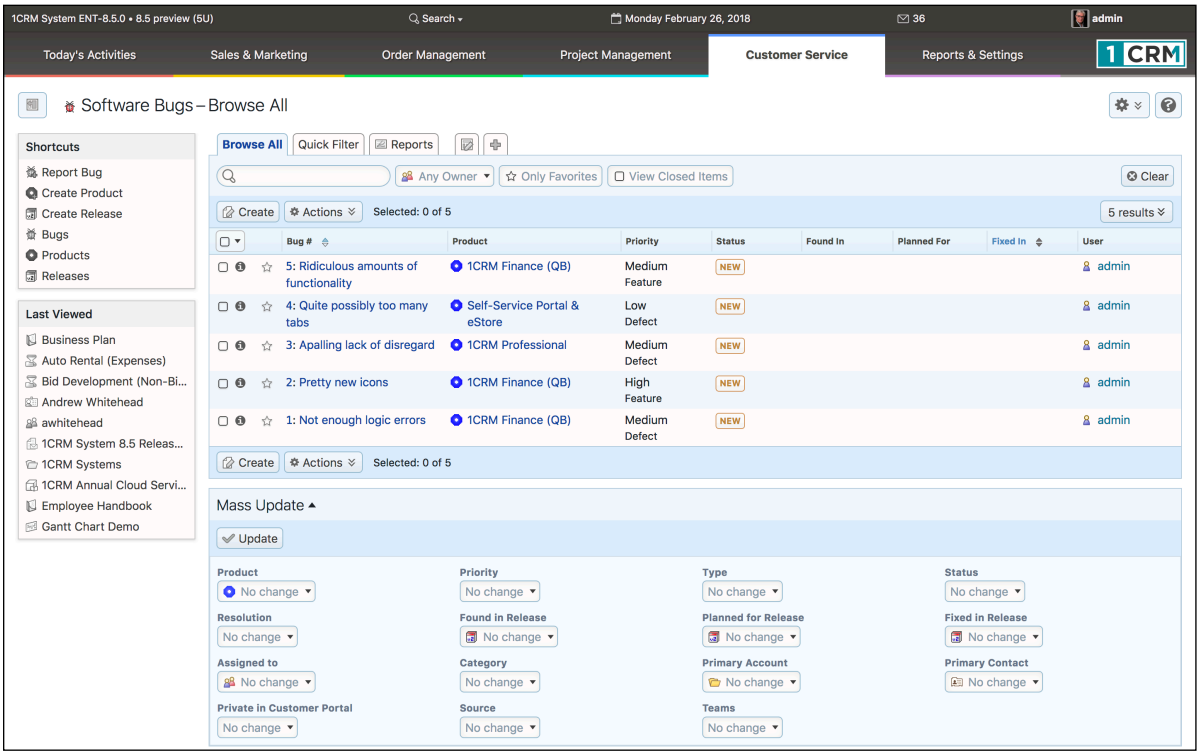


Figure 248: The Software Bugs Module

Software Bugs are defects or features associated with a specific revision of a particular software product. They may be managed and tracked through their life-cycle using the Software Bugs module. Bugs may be assigned a priority of Urgent, High, Medium and Low. They have a status of New, Assigned, Closed, Pending Input, or Rejected. Each Bug specifies the product and release in which the bug was found, the release in which it is planned to be fixed, and the release in which it actually was fixed. Each Bug may also be assigned a resolution status of *Accepted, Duplicate, Fixed*, *Out of Date*, *Invalid*, or *Later*.

The dropdown list of choices for products is populated by the System Administrator using the *Products* shortcut within the Bugs module. Each product has a name, and a description. Then for each product you can create a series of releases using the Create button on the Releases list view, reached using the *Releases* shortcut. Each release specifies the product it relates to, a release version, a status (*Active* or *Inactive*, where Inactive releases are no longer shown on dropdown lists as options for data entry), and an order (to set the order this release will appear in the Release dropdown lists for this product).

The Software Bugs module has a Help icon on the title bar at the top of the main screen body, followed by a choice of layout tabs, and a list of all or selected Bugs. Each Bug in the list has a check box at the left, and at the bottom of the screen is a facility to update one or more field values for all selected Bugs.

The Bug list may be sorted by clicking on any column title that has the icon beside it. Clicking on a column title when it is already the highlighted sort column reverses the sort order.

The Bug list is paginated if it contains more items than may be listed on the display and controls are provided to go to the start or end of the list, or step to the next or previous page. Clicking on the subject for any Bug in the list displays the detail information for that Bug.

The navigation shortcuts provided will help you create a new Bug report, or switch back to the Bug list view.

8.6 The Knowledge Base Module

Figure 249 shows the 1CRM screen with the Knowledge Base module selected, showing a list of the Knowledge Base *Articles*:

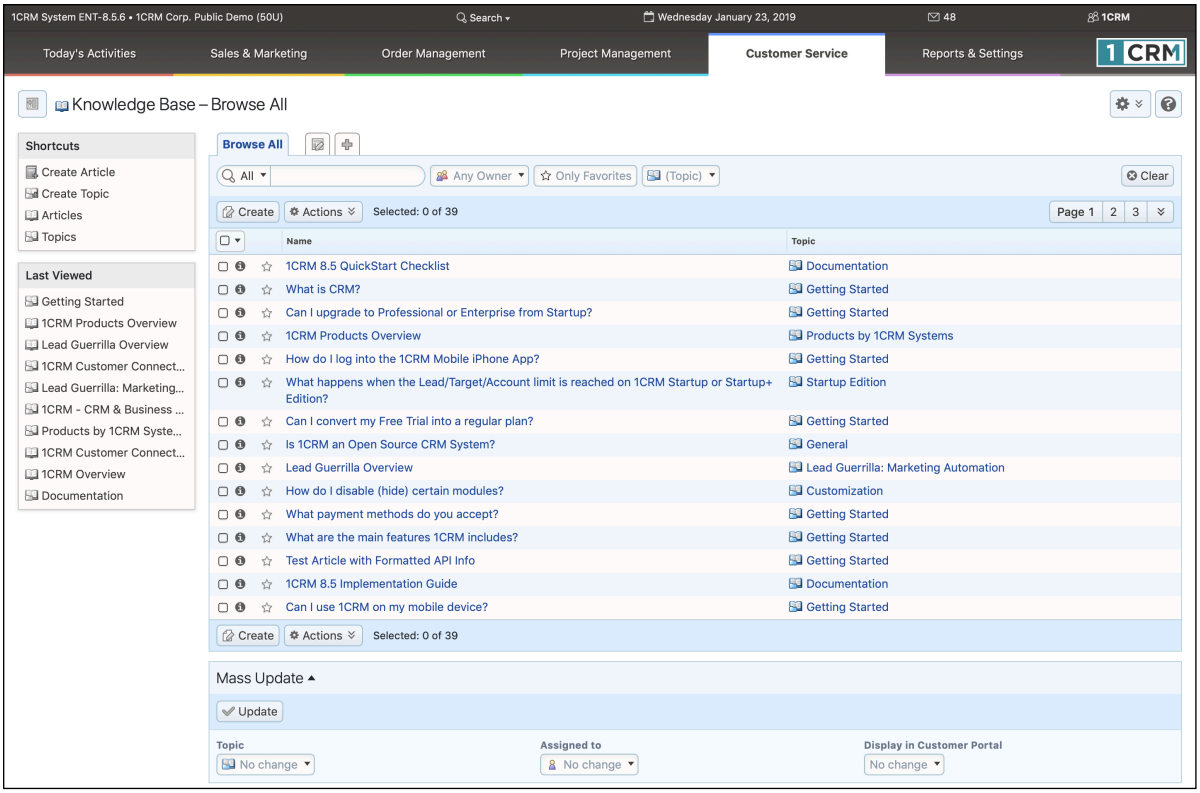


Figure 249: The Knowledge Base Module, Articles List View

This module allows you to create Articles in a Knowledge Base, search them using full-text search, and optionally expose them to your customers as valuable information that they can search through using the *1CRM Customer Connection* Self-Service Portal. The figure above shows the default Knowledge Base list view of Articles. Note the shortcuts for listing all Articles, creating a new Article, and creating or listing the *Topics* used to group your Articles.

You begin by defining one or more Topics, using the *Create Topic* shortcut. Each Topic contains this information:

- *Name:* Topic names will be how users in the *1CRM Customer Connection* portal see and navigate the organization of all your Articles. They should be meaningful for users.
- *Parent Topic* (optional): Used to create a hierarchy of *Topics* to organize your *Articles*. Choose the name of a Topic within which your new Topic will be contained if you want a multi-level organization for your Articles.
- *Icon (optional):* Choose a standard icon, or upload a custom icon, used as a visual cue for the meaning of this Topic.
- *Display After:* Choose a Topic, or *Top of the List*. This sets the order in which your Topics will be presented to visitors in the 1CRM Customer Connection portal. If you do not edit this field, by default each new Topic will go in at the top of your list of Topics, and push older Topics downwards.

- *Description:* A brief description of what types of Articles this Topic will contain, which will be presented to users as they browse your Help/KB content in the *1CRM Customer Connection* portal.

The two Figures below show the process of entering a new Topic, and then the Topics List View. Notice how the Topic we create has a Parent Topic, and how that is shown in the Topics List View. With this capability you are able to create a hierarchy of topics with multiple levels, which any user of the *1CRM Customer Connection* portal can navigate.

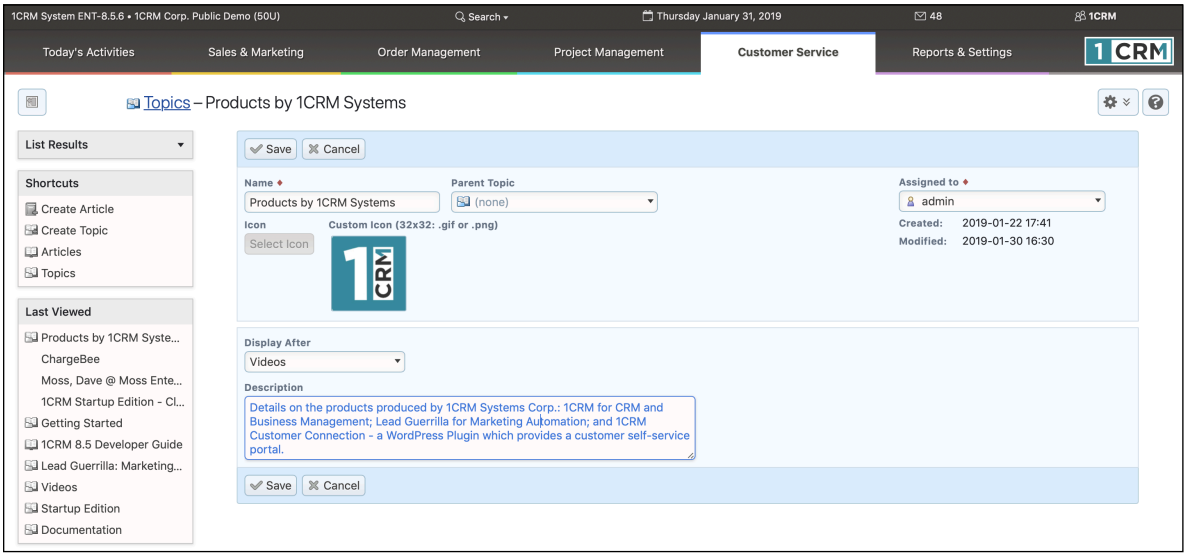


Figure 250: Creating a New Topic

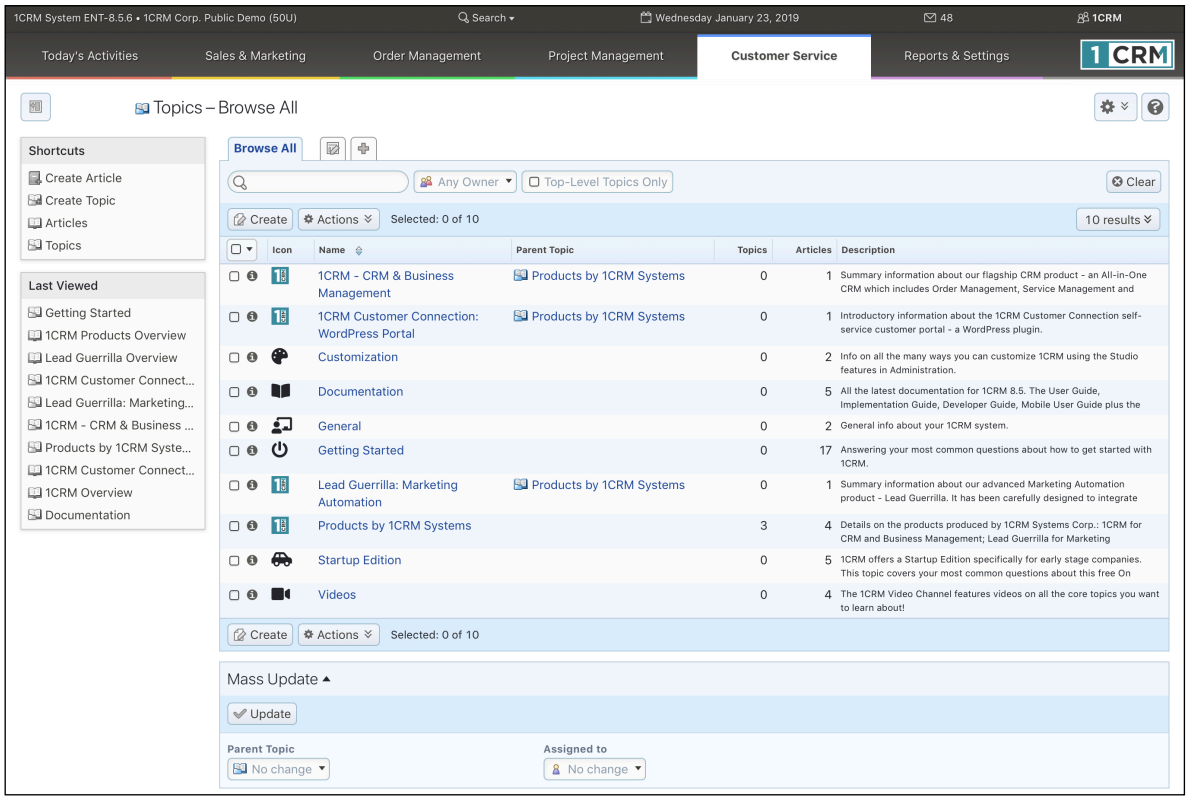


Figure 251: Topics List View

Once you have added the first few Topics you want, you'll need to create some Articles. The figure below shows how an Article is entered. (***Note:*** An Article can also be created fairly automatically using the *Add to Knowledge Base* button on the Case detail view.)

Each Article contains this information:

- *Name:* Article names will be how users in the *1CRM Customer Connection* portal see any reference to your Articles. They should be meaningful for users.
- *Topic*: Choose the *Topic* within which your *Article* will be seen.
- *Summary:* A brief description of the content of your Article. This will be presented to users as they browse your Help/KB content in the *1CRM Customer Connection* portal.
- *Display in Customer was Portal:* A checkbox which controls if this Article is only available for CRM users, or if it will be available within the *1CRM Customer Connection* portal.
- *Display After:* Choose an Article, or *Top of the List*. This sets the order in which your Articles will be presented within this Topic to visitors in the 1CRM Customer Connection portal. If you do not edit this field, by default each new Article will go in at the top of your list of Articles, and push older Articles downwards.
- *Content:* The HTML content of your Article. It can contain HTML links to external web content, as well as links to Knowledge Base Topics or Articles.

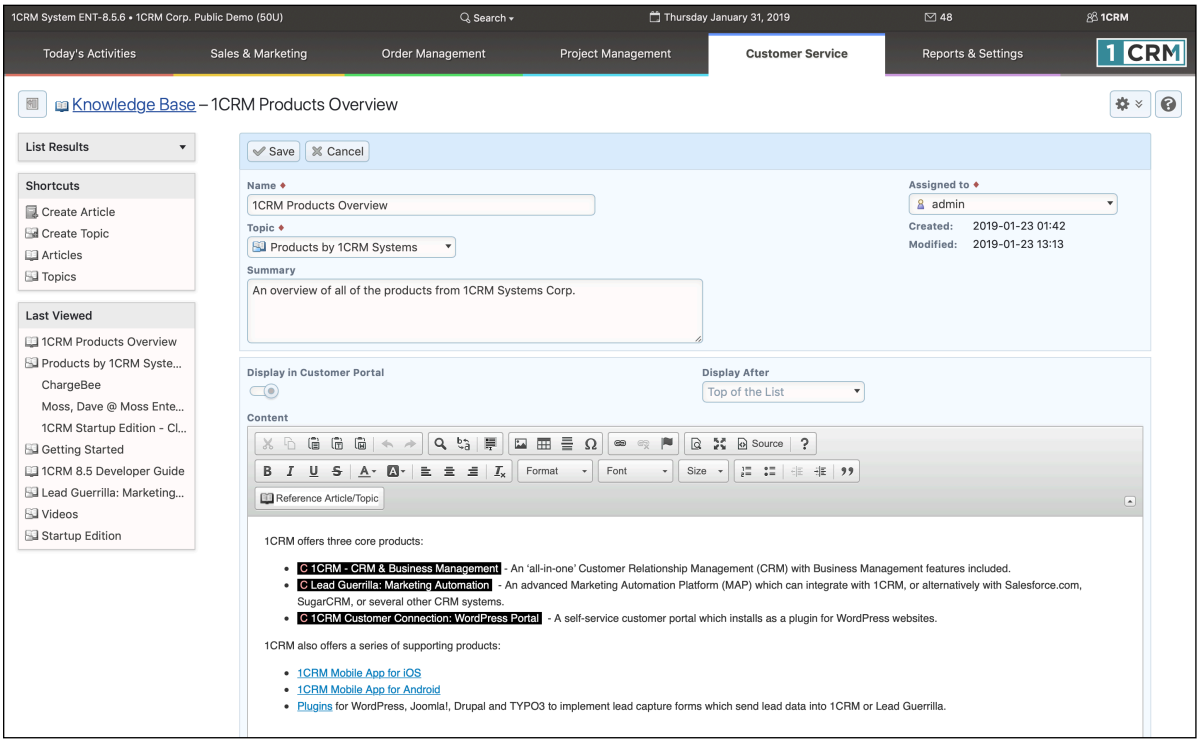


Figure 252: Creating or Editing an Article

Simply enter the Article's Name, Summary (optional) and Content. Note that the content may be HTML or just text. Then set the checkbox *Display in Customer Portal* as appropriate to control public viewing of the Article. Choose an Article in the *Display After* dropdown list if you want to set a specific display order for your Articles under this Topic. Finally, choose a *Topic* for your Article.

Click on *Save*, and your new Article is added to the Knowledge Base.

Note: When using the HTML editor controls as you create the *Content* of your Article, you can add HTML links as normally possible in this editor (see Section 4.8.1). But you can also add a special kind of link in Articles using this extra button Reference Article/Topic you'll see in the Editor control bar above. When you click on this button you'll see a popup asking you if you want to add a link to a Knowledge Base Article or Topic. Once you make that choice, you'll be presented with the ability to select the desired Article or Topic.

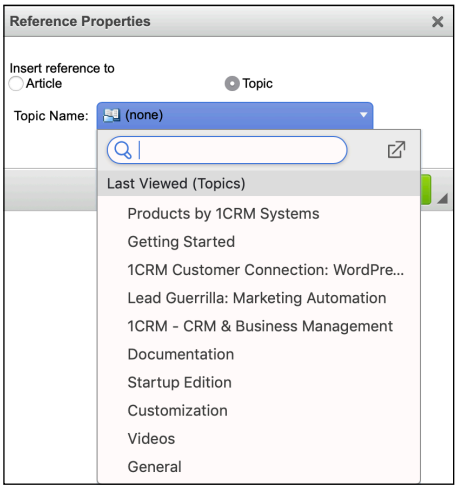


Figure 253: Linking to an Article or Topic within Article Content

After you add this link, your HTML document display will gain a special item of the form A Article 1. In the *1CRM Customer Connection* portal, this will be presented to the user as the link to the related Article or Topic. (See the Figure above for Editing or Creating an Article.)

Once you have created all your Articles and Topics, if you have the 1CRM Customer Connection installed on a WordPress site the Help capability within it will look something like the Figure below:

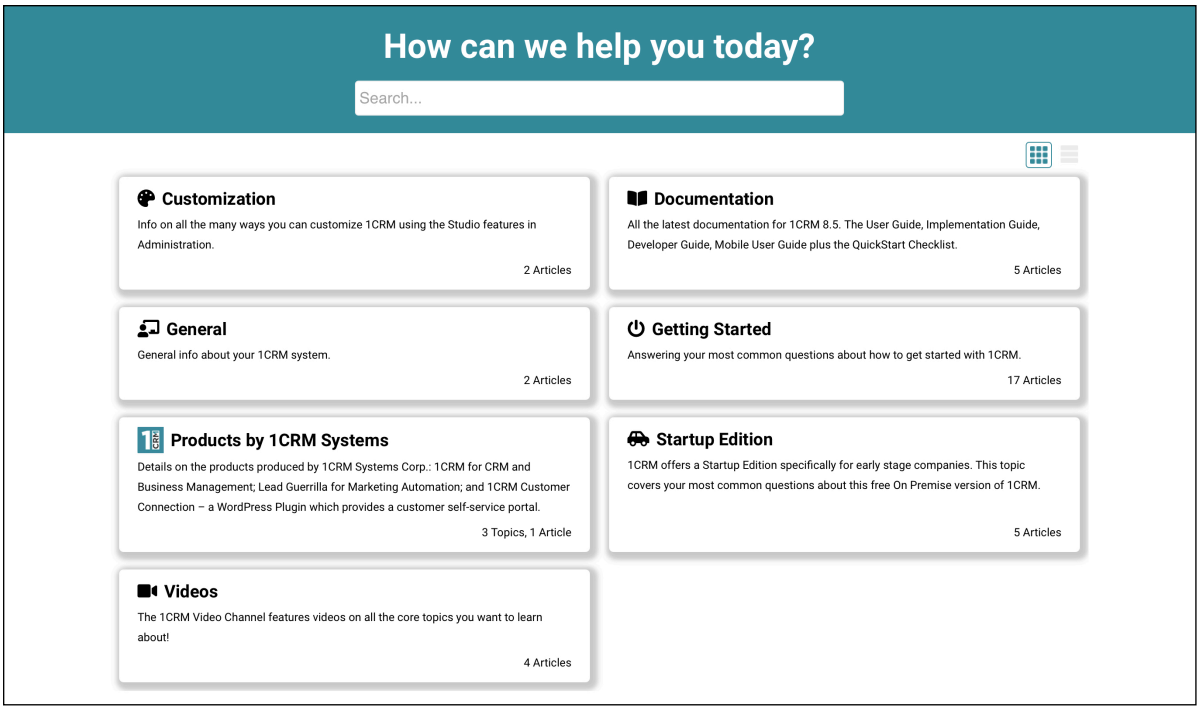


Figure 254: 1CRM Customer Connection - Help System

Note: You can link Documents or Notes (with optional attached binary files) to Knowledge Base Articles, and they will be accessible by customers in the portal if the Article is displayed there.

Portal visitors can navigate the Help system by clicking on Topics or Articles. A breadcrumb trail is displayed at the top left, as seen below. A control at the top right is available to select grid or list view format.

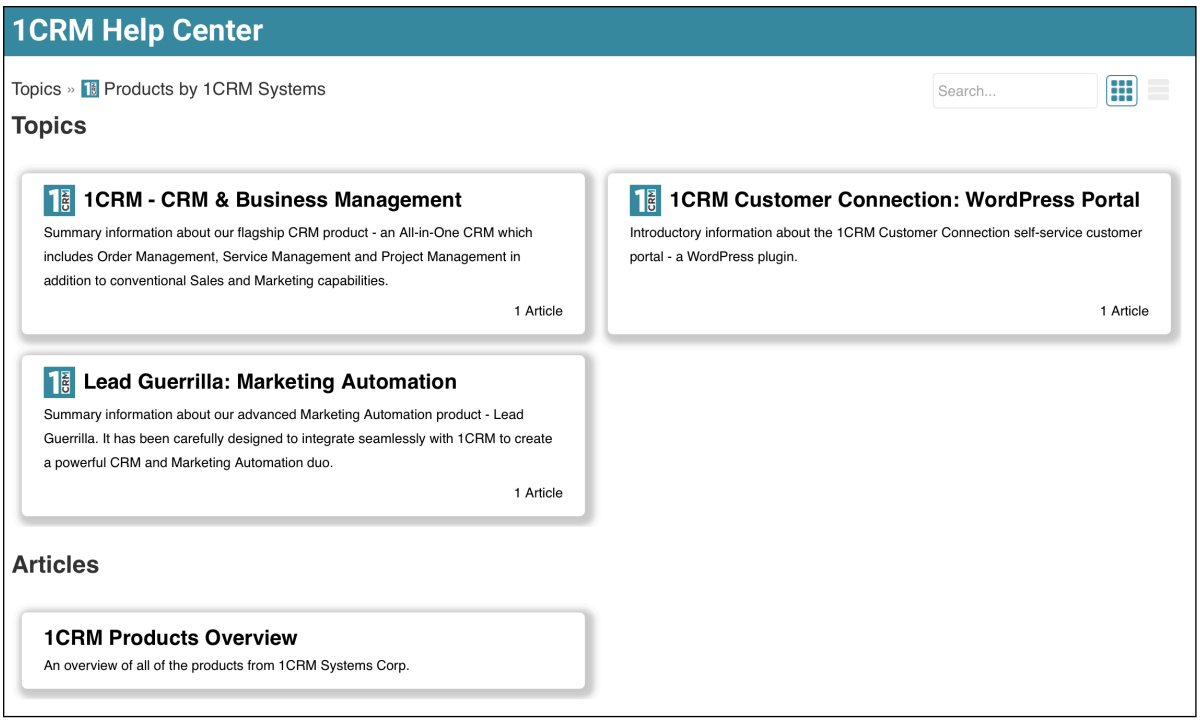


Figure 255: 1CRM Customer Connection - Navigating the Help System

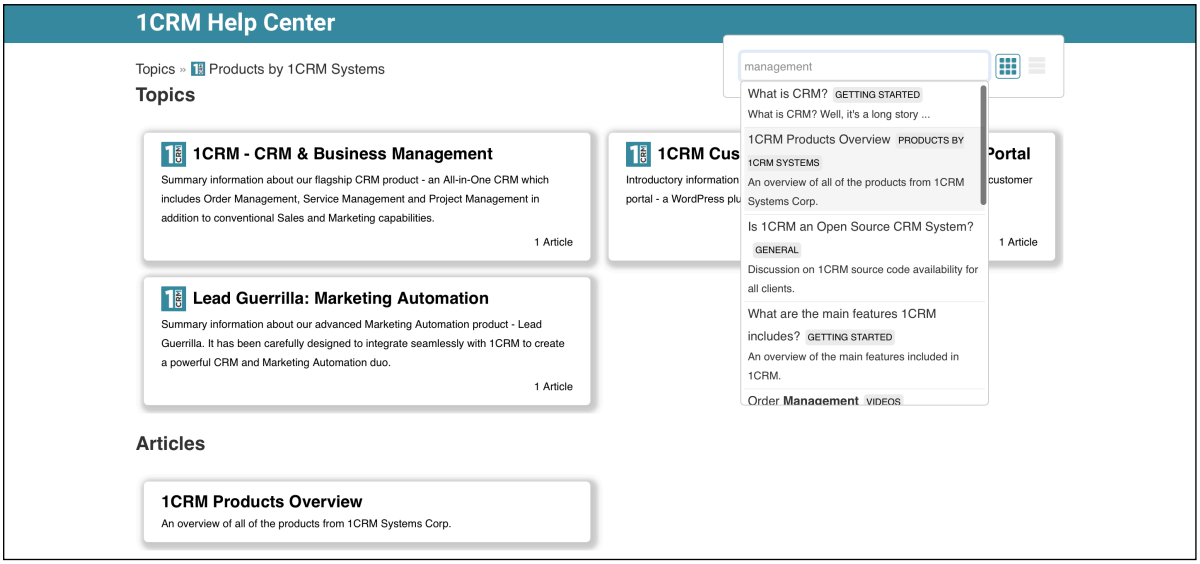


Figure 256: 1CRM Customer Connection - Searching the Help System

As shown above, users can also click in the Search box and get dynamic feedback on matches as they enter their search text. The results are shown in a scrollable list, with each entry showing the

Article subject, the Topic it falls under, and the first portion of the Article Summary text. Simply click on any result in the list to read that Article.

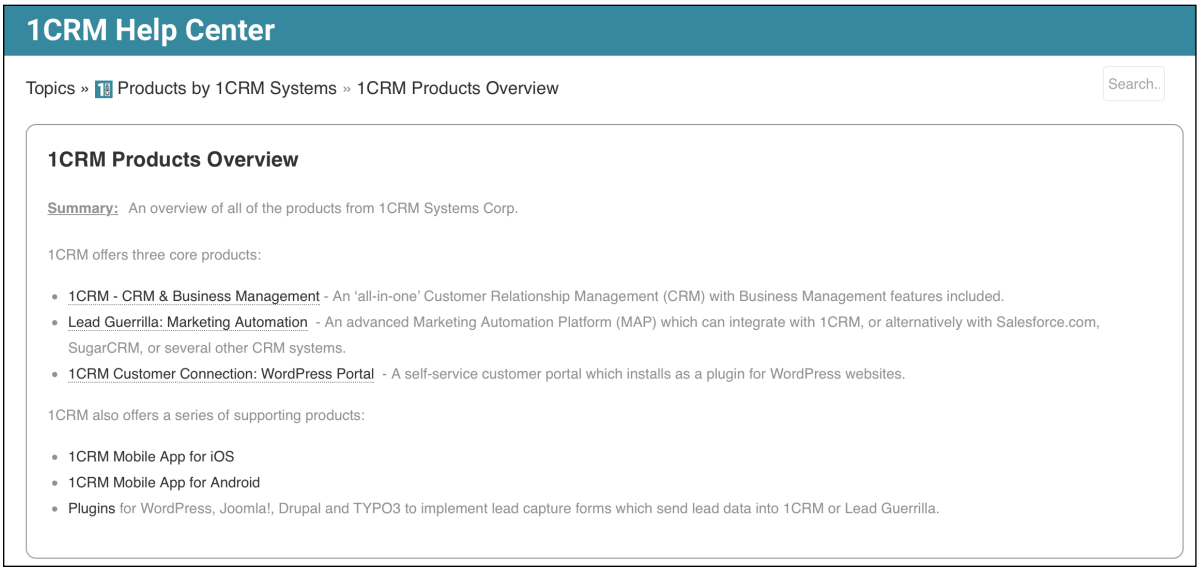


Figure 257: 1CRM Customer Connection - Reading an Article in the Help System

9.0 Reports & Settings

9.1 The Reports Module

Figure 258 shows the 1CRM screen with the Reports Module selected:

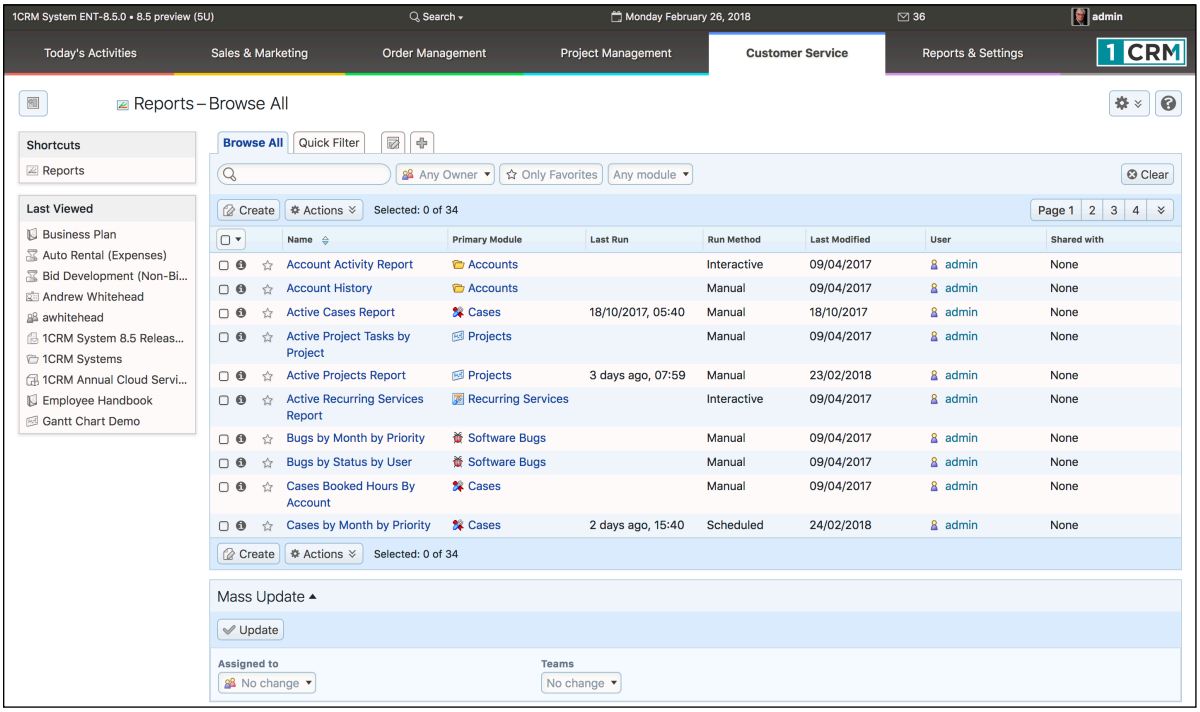


Figure 258: The Reports Module

This module is one of the most important within 1CRM – without it you must develop your understanding of the current state of your business using just the list views in each module, and the charts on the dashboard. For a smaller organization this is almost workable, but as businesses get larger and the data becomes more complex, reporting is mandatory, not a nice-to-have feature.

The list view of the reports module shows a list of available reports. You may click on the name of a report to run that report, or to see the archived results of previous runs of that report. Each report listed shows its name, the principal module on which it reports, when it was last run, when it was last modified, and if it is set to run manually, interactively or automatically.

A number of predefined standard reports are included with the system, and new report designs may be easily developed and saved for repeated use in future, by clicking on the Create button.

9.1.1 Running Standard Reports

To run a standard report, you need to select it from the reports list view. This shows you the report detail view (see Figure 259), from which you can then run the report by clicking on the Run Report button. You can also click on the Edit Report button, to view the report edit view, which shows the report name, the primary module from which its data is drawn, and the run method and interval - and allows you to edit the report definition. As well, you can use the Show Report SQL button to display a popup box with the SQL query language to be used by that report.

Note: In the Claro and Flex themes, the Edit Report button and the Show Report SQL button are no longer buttons, but are options on a settings dropdown control .

When you run the report, the results are displayed on the *Report Run Details* screen, as shown in Figure 260 (unless it is an *Interactive* type report). When you wish to exit this screen, just click on the Return to Report button, to go back to the report detail view. The data from this run of the report will be archived, and added to the *Archived Runs* sub-panel on the detail view display. You can also exit the screen by clicking on the Delete Run button, in which case you will still return to the report detail view, but now without the current report data added as a new archived run.

In the report run details screen, you may page forward and backwards through the detail lines of the latest run of the report. (Remember you can temporarily change the page length if you like!) The *Print* option on the Actions button is used to generate a landscape-mode Acrobat PDF print-image file of the report. The results may also be exported to a CSV file for further analysis in Excel, using the *Export* option on the Actions button. Depending on the specific report, items in the report may also be hyperlinked, enabling you to click on them to view the item's detail view.

Archived runs of a report may be viewed at any time by clicking on the hyper-linked run number. Each archived run carries a run date and time, a name, description and assigned user, and may be deleted if desired by clicking on the icon.

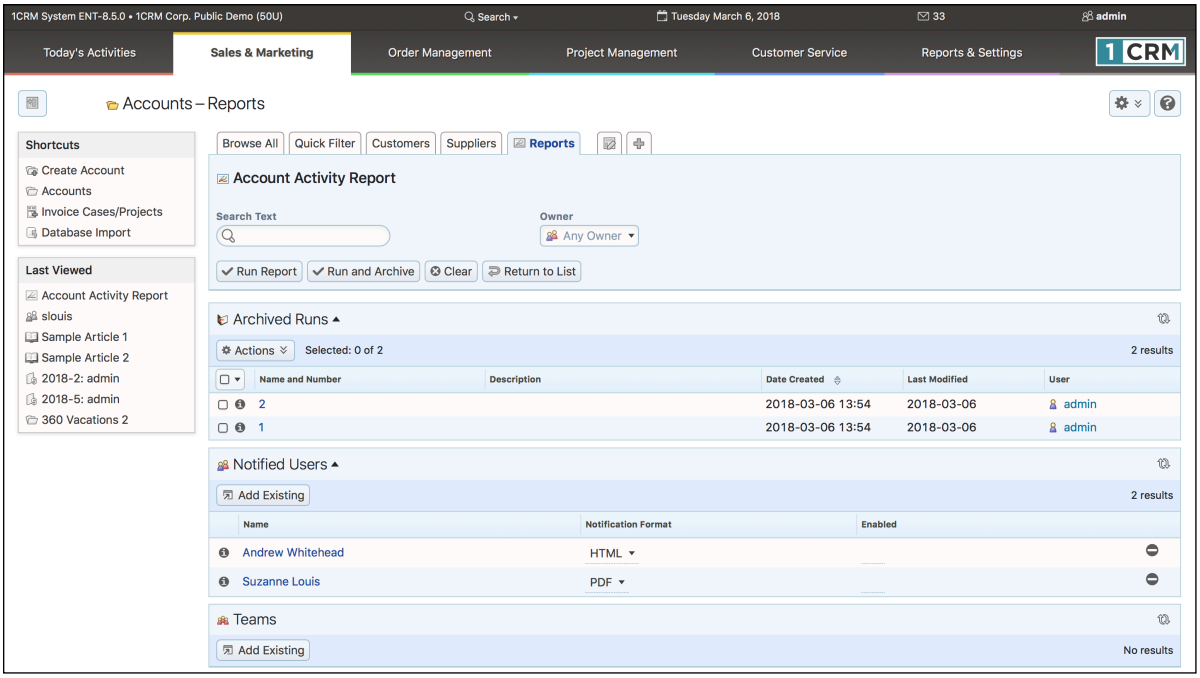


Figure 259: The Report Detail View

Note: Archived runs of a report can sometimes build up, to the point where you have dozens, or even hundreds of report runs archived. Usually the extreme cases of this happen for Scheduled Reports, where the 1CRM system itself runs the reports automatically on a regular basis. To control this accumulation, 1CRM scheduled reports let you set a value *Max. Number of Runs to Keep*. Your system administrator controls a scheduler task that periodically checks all scheduled reports, and removes the oldest report runs in excess of the maximum number to be kept. You can also remove them using the *Delete* Action on the *Archived Runs* sub-panel of any report.

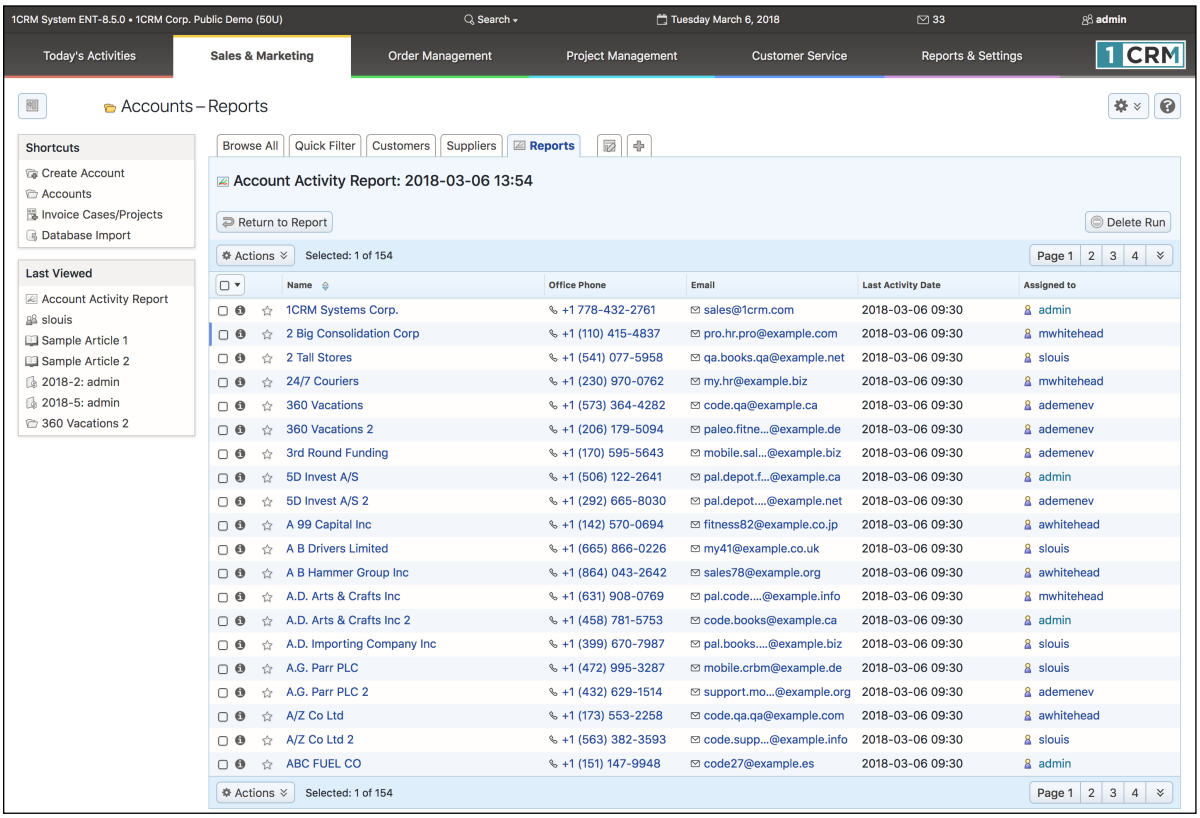


Figure 260: Report Run Details

9.1.2 Creating New Reports

There are two ways to define a new report: either click on the Create button on Reports list view and choose a module from a popup menu; or go to the list view of the module you want to report on, click on the *Reports* layout tab (see Figure 260 for example), and then click on the layout tab labelled ✚. Either approach gets you into the *Report Editor* editing a new report, based on the desired module (see Figure 261). Choose a name for the report, and enter a Description.

Next, choose the *Run Method* and (for Scheduled Reports only) the *Next Run* date and time and *Run Interval*.

- If the report will only be run manually as required, then set the Run Method to *Manual*.
- Set the Run Method to *Interactive* if you wish the report to be run like a manual report, but with the ability to set report filter values interactively as the report is generated.
- If you wish the report to be run automatically at regular intervals, then set it to *Scheduled*, set the *Next Run* date to the first time you'd like it to be run, and the *Run Interval* to the number of Days, Weeks, Months, Quarters or Years desired between runs. Also set the *Max. Number of Runs to Keep* as desired.

Note: Scheduled reports will not be run unless the Scheduler is setup properly by the Administrator.

The Primary Module on which the report is to be based will be pre-set, but you can optionally choose one or more *Related Sources*, such as Contacts and Meetings as shown related to the Accounts module in Figure 261. Once you have done that, you can proceed to the other Report Editor tabs.

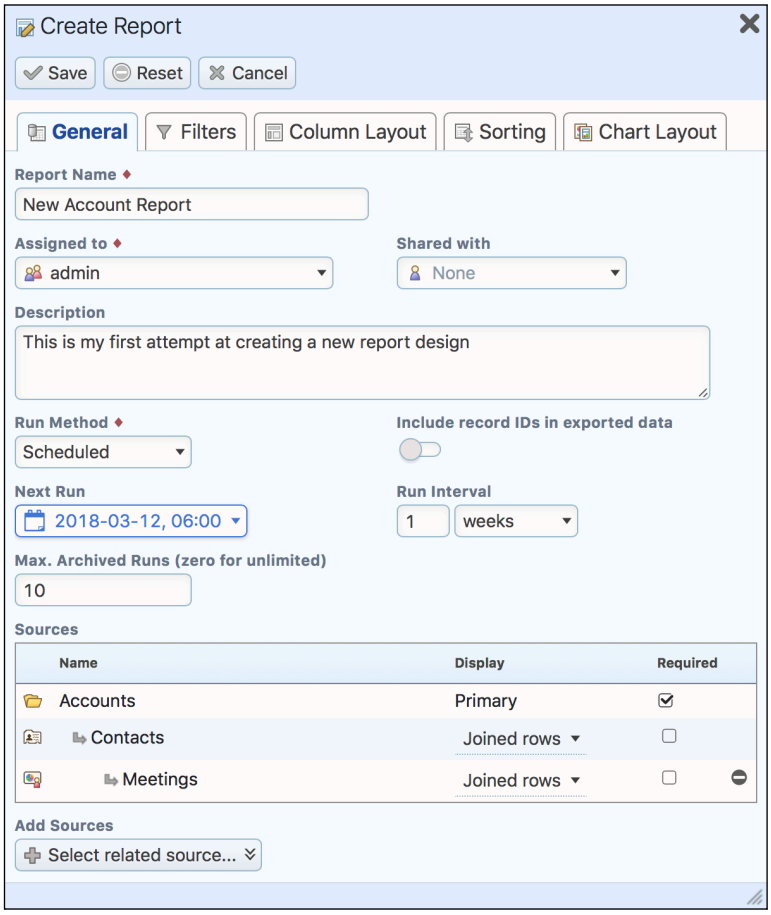


Figure 261: Editing a New Report - General Tab

9.1.3 Setting Report Filters

Clicking on the Filters tab will reveal a screen much like that in Figure 262. Note that in this Figure we have checked Non-Zero Balance Only - so that the report only shows us Accounts that owe us money. And we have defined a Filter Group (by clicking on the Add filter group button), and set it to group the filters together using *Any Of* logic, and then added the *Country* field to it twice using the Select filter... button, looking for Canada in one instance of the filter, and USA in the other.

This will have the effect of only listing Accounts in Canada or the USA, that also owe us money.

The Filter Group logic options are:

- *All Of*: All the conditions indented under the Group must be true
- *Any Of*: Some of the conditions indented under the Group must be true
- *None Of*: None of the conditions indented under the Group may be true

- *Not All Of*: Not all of the conditions indented under the Group may be true (so if some or none of them are true, that's fine)

Note: Use the ☰ control to drag a filter left and right, to indent it under a filter group, or un-indent it from one.

Note: The *Hide* checkmark is used only for *Interactive* reports. It allows you to define a filter for an Interactive report, but not to expose that filter to the user during the interactive session as they adjust filter values.

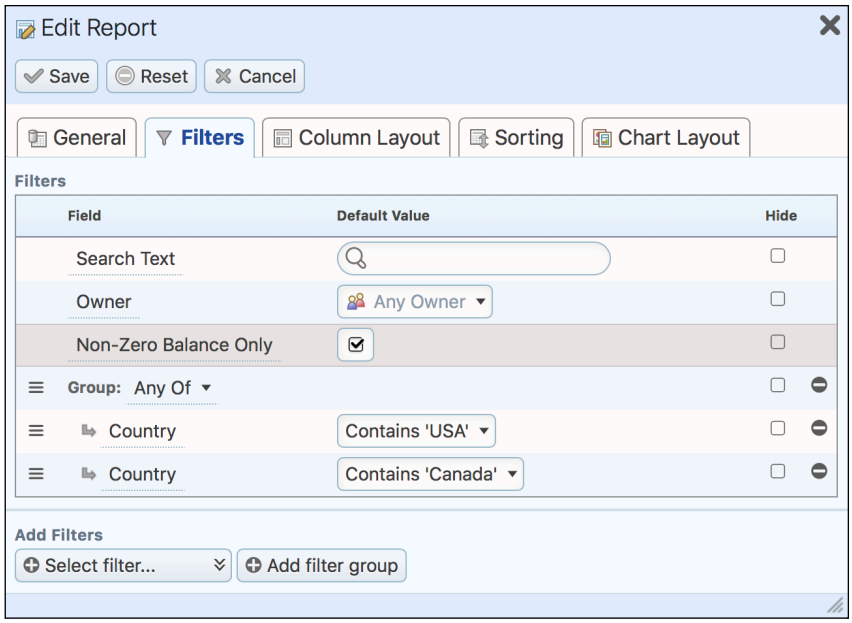


Figure 262: Editing a New Report - Filters Tab

9.1.4 Defining your Report's Column Layout

Next, click on the *Column Layout* tab. As in the Figure below, you should see a list of field names, with each entry also showing the field type, a width allowance for the field, and a few other values. The order of these fields from top to bottom represents what you will see on the screen, and in any PDF you generate, from left to right. Some key points on operating this tab are:

- Any field with the *Hide* checkmark set will be used in the creation of the report, but will not be shown on screen or in the PDF.
- To remove any field, just click on the ⊖ icon to the far right.
- To make any field wider on screen and on the PDF, increase the Width value (Max. 50).
- You can space out your columns by adding empty columns as fields, with the + Add empty column button.
- Add Totals to your PDF (not shown on screen) with the + Select total... button.
- To reorder fields, use the ☰ control to drag fields up and down.
- You can add new fields with the + Select field... button. Clicking on it will present you with a long scrolling list of fields, also showing the field types.
- Click on the ⚙ icon to the right of any field, and select the dropdown *Make Grouped* option to convert this to a Grouped Field.

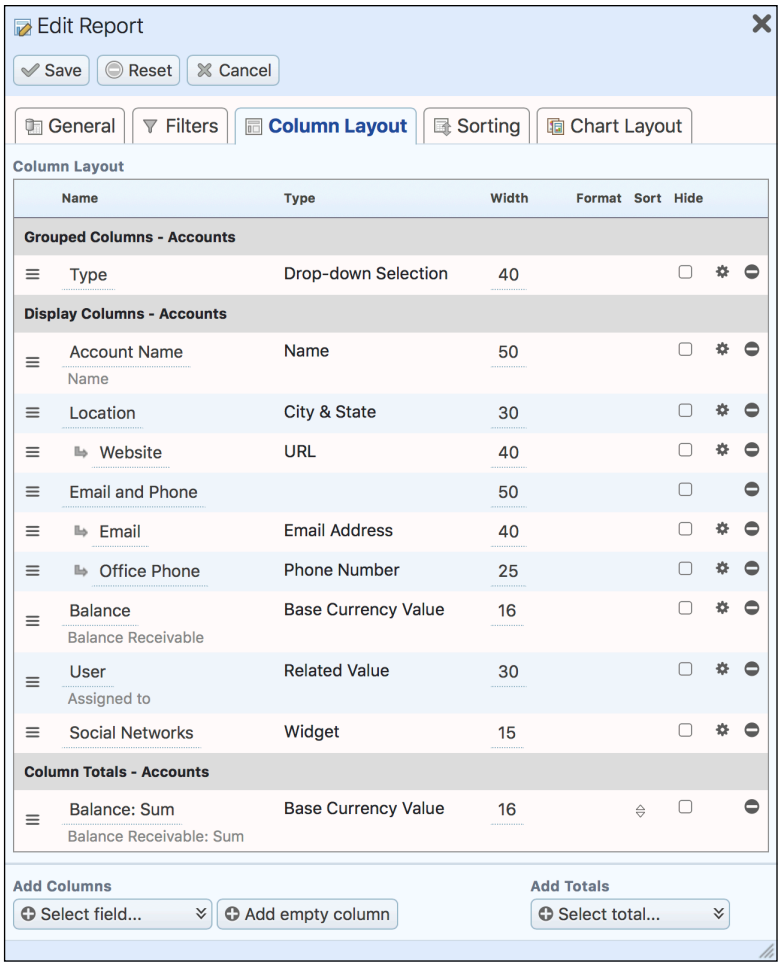


Figure 263: Editing a New Report - Column Layout Tab

Additionally, note that:

- If you click on the underlined name of any field, you will be prompted to enter a new name, which will be used on the screen and for the PDF. You can also reset the name to its default.
- If you select a date, date/time or currency field, you will also need to select the preferred format for that field in the *Format* column, using a Format dropdown control.
- Date fields may be formatted to show just the Month, Quarter, Year, Year & Month, Fiscal Quarter, or Fiscal Year. Date & Time fields offer the additional options of Date only or Time only. Fields like this may be added to the field list more than once, in multiple data formats. So – a date could be added as the Fiscal Quarter it belongs to – so it can be used to group data by fiscal quarter – but also as the original date value so it can be displayed.
- A currency field may be formatted as Standard, Rounded (no decimal places), In Thousands ($425,500.07 is shown as $426K), or In Millions ($425,500.07 is shown as $0.4M).

The *Column Layout* tab displays three types of columns (fields), with a sub-heading for each:

1. Grouped Columns – These fields are used to group data in the report. One could group accounts by the account type, as above, or contacts by category, or invoices by the month in which they are due. Grouped columns will organise the screen report by the specified field, and will produce a PDF with sub-heading titles for each new value for the grouped field

2. Display Columns – These fields will be visible in the on-screen report data, as well as in the PDF version of the report, and they are also included in any exported data. The exception to this is fields marked *Hide*.
3. Column Totals – Totals are added by clicking on the Select total... button to the bottom right. Clicking on it will present you with a long scrolling list of fields, also showing the field types. Entries show the field and mathematical function desired (such as Balance: Sum – which would let you sum the balances of all accounts). Select the combination of field and mathematical function (Count, Min, Max, Sum, Avg, StdDev) you want, to generate functions on this field for all records in the report.

   These calculated values are shown at the end of any PDFs generated. Not all field types offer Totals – they are available as follows:

   a. No Totals: Text, Multi-Line Text, True or False, Dropdown, Phone Number, Email Address, Related Value, and User Name fields.
   b. Count: Name fields.
   c. Min, Max: Date, Date & Time fields.
   d. Sum, Avg, Min, Max: Currency fields.
   e. Sum, Avg, Min, Max, StdDev: Integer, Number, Real Number fields.

9.1.5 Report Sorting

As you may see in the Figure below, reports may easily be sorted by selecting a field on which to sort, and then choosing *Ascending* or *Descending* sort order. If you define multiple sort fields, the first will be the primary sort field, the next the secondary, and so on.

To reorder sort fields, use the control to drag fields up and down.

To remove a sort field, just click on the icon to the far right.

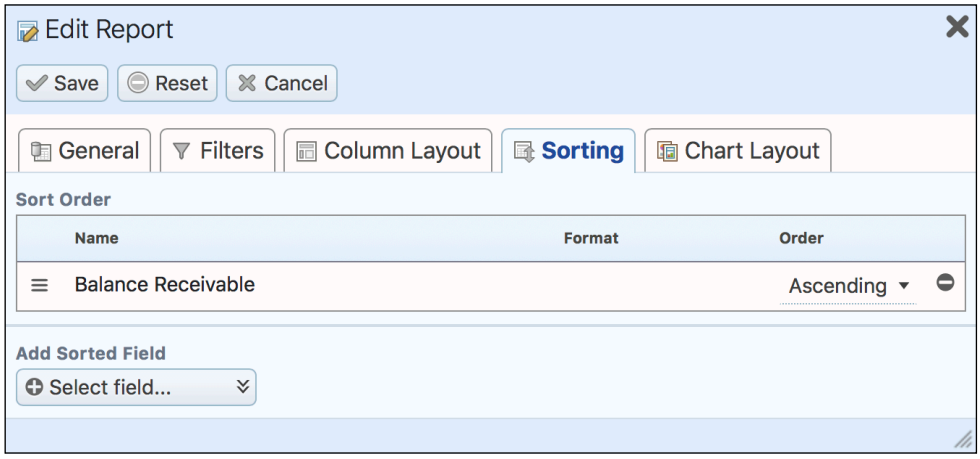


Figure 264: Editing a New Report - Sorting Tab

9.1.6 Defining your Report's Chart Layout

Charts may be created from any report, providing that the report has at least one reported field whose display type is set to Grouped, and add at least one total. Once these conditions are met, the *Chart Layout* tab allows you to select a Chart Type (Horizontal Bar Chart, Vertical Bar Chart, Pie

Chart, Line Graph or Area Chart), and a Data Series (from all chartable data series available). You may also enter a Chart Title, Rollover Text and Chart Description.

Once a chart has been defined, the next time the report is run, a chart will be generated as part of the report. As well, the chart will be made available in the list of chart dashlets which may be added to the dashboard.

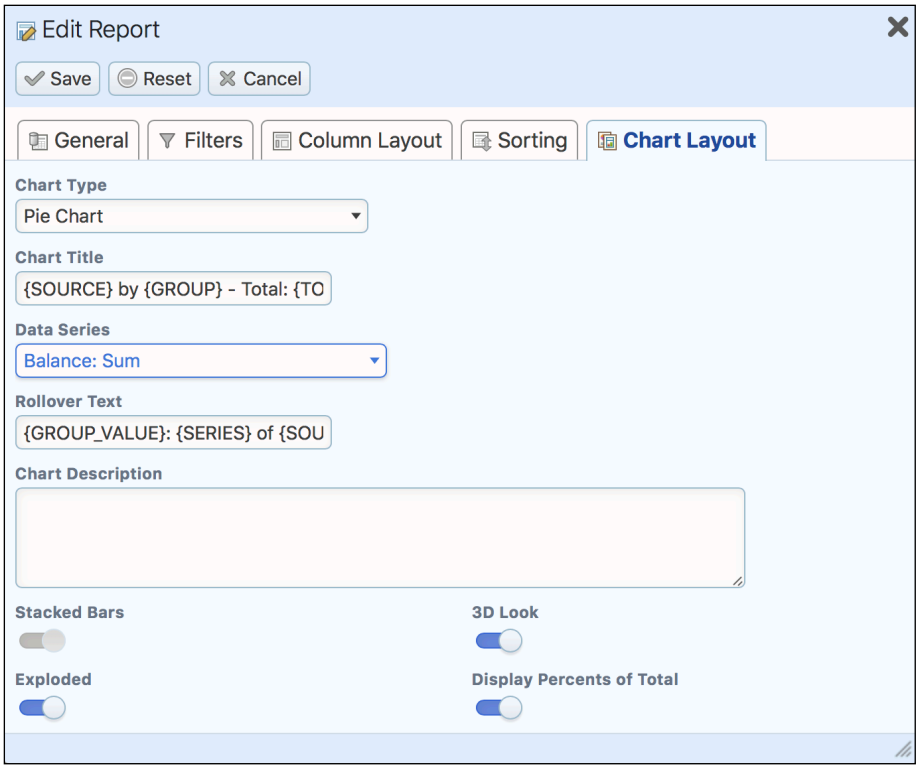


Figure 265: Editing a New Report - Chart Layout Tab

9.1.7 Working with Related Sources

To create a report that relates data in one module (*table* in database terms) to data in another module, or includes data from more than one module, just create a report normally from the list view of your most important module in the report. The Primary Module of the report will be pre-set, but you can also optionally choose one or more *Related Sources*, such as Contacts and Meetings as shown related to the Accounts module in Figure 261.

Now when you click on the Select field... or Select total... buttons, you will see a dropdown list that requires you to select the module from which to choose a field.

The best way to understand these more complex reports is to study the pre-programmed reports included with the system. Look for reports with titles like *Contacts by Account* – any report that mentions two tables in its name.

9.1.8 Specialized Reports

Several of the standard reports that are provided with 1CRM are not actually created by the normal report designer described above, but are custom coded in the report template format that is produced by the report designer. This is because the 1CRM report generator is capable of producing many reports which cannot actually be described through the use of the report designer.

The limitations of the report designer are intentional, to create a user interface that is more approachable by most users. But to take full advantage of the report generator's capabilities, coding a report manually, directly into the report template format, is a powerful option available to software developers customizing or extending an 1CRM implementation.

Some of these specialized hand-coded reports included with 1CRM are:

Project Profitability: This report details Project profitability month by month, with totals summed on the PDF. Filters for project status and start date let you focus on the projects desired. Principal fields are Account, Project Name, expected revenue, cost and profit, and actual revenue, cost and profit.

Gross Profit by Invoice Range by User: This report details Gross Profit generated for each invoice, with totals summed on the PDF. Filters for invoice creation date and invoice number let you focus on the invoices desired. Principal fields are invoice number and name, invoice date, Account, invoice amount, gross profit and assigned user.

Sales Tax Collected by Invoice Range by User: This report details the sales tax collected by invoice, with totals summed on the PDF. Filters for invoice creation date and invoice number let you focus on the invoices desired. Principal fields are invoice number and name, invoice date, Account, Tax name and amount, invoice amount and assigned user.

1CRM Systems Corp. • 688 Falkland Road • Victoria, BC V8S 4L5 • Canada

Contacts by Account - 2018-03-18 13:03

Account Name									
1CRM Systems Corp.									
First Name	Last Name	City	State	Country	Office Phone	Mobile Phone	Email		
Sergio	Dargan	San Mateo	BC	USA	+1 (080) 241-6419	+1 (497) 139-0024	pro.hr@example.biz		
Dominic	Leister	Santa Fe	BC	USA	+1 (154) 195-0790	+1 (306) 562-3207	books.paleo@example.de		
Rhonda	Verdi	Salt Lake City	BC	USA	+1 (770) 438-7212	+1 (646) 319-1729	code32@example.biz		
Michael	Whitehead	Victoria	BC	Canada	+1 (778) 432-2761		michael@1crm.com		
Account Name									
2 Tall Stores									
First Name	Last Name	City	State	Country	Office Phone	Mobile Phone	Email		
Kerry	Hunsaker	Los Angeles	NY	USA	+1 (127) 296-6041	+1 (449) 547-6018	qa33@example.co.uk		
Althea	Laymon	San Jose	NY	USA	+1 (893) 928-6089	+1 (389) 020-4368	books.pal.qa@example.de		
Bonnie	Newburn	Ohio	NY	USA	+1 (133) 931-8122	+1 (764) 275-4715	crbm.mobile.fitness@example.it		
Blanca	Wenner	San Jose	NY	USA	+1 (252) 491-1611	+1 (947) 282-1639	code.dev@example.eu		
Account Name									
24/7 Couriers 2									
First Name	Last Name	City	State	Country	Office Phone	Mobile Phone	Email		
Lawrence	Boren	Salt Lake City	CA	USA	+1 (610) 403-9973	+1 (857) 724-5761	crbm.books.books@example.info		
Chas	Wilker	St. Petersburg	CA	USA	+1 (981) 881-1693	+1 (989) 573-5785	code.hr@example.de		
Account Name									
360 Vacations									
First Name	Last Name	City	State	Country	Office Phone	Mobile Phone	Email		
Gavin	Artman	Salt Lake City	CA	USA	+1 (686) 050-4368	+1 (660) 931-9577	depot66@example.ca		
Katrina	Riehl	Sunnyvale	CA	USA	+1 (240) 271-8664	+1 (314) 904-9002	hr.qa@example.co.jp		
Account Name									
360 Vacations 2									

Prepared by 1CRM

1 of 20

Figure 266: Sample Report PDF

9.2 The Dashboards Module

Figure 267 shows the 1CRM screen with the Dashboard Module selected:

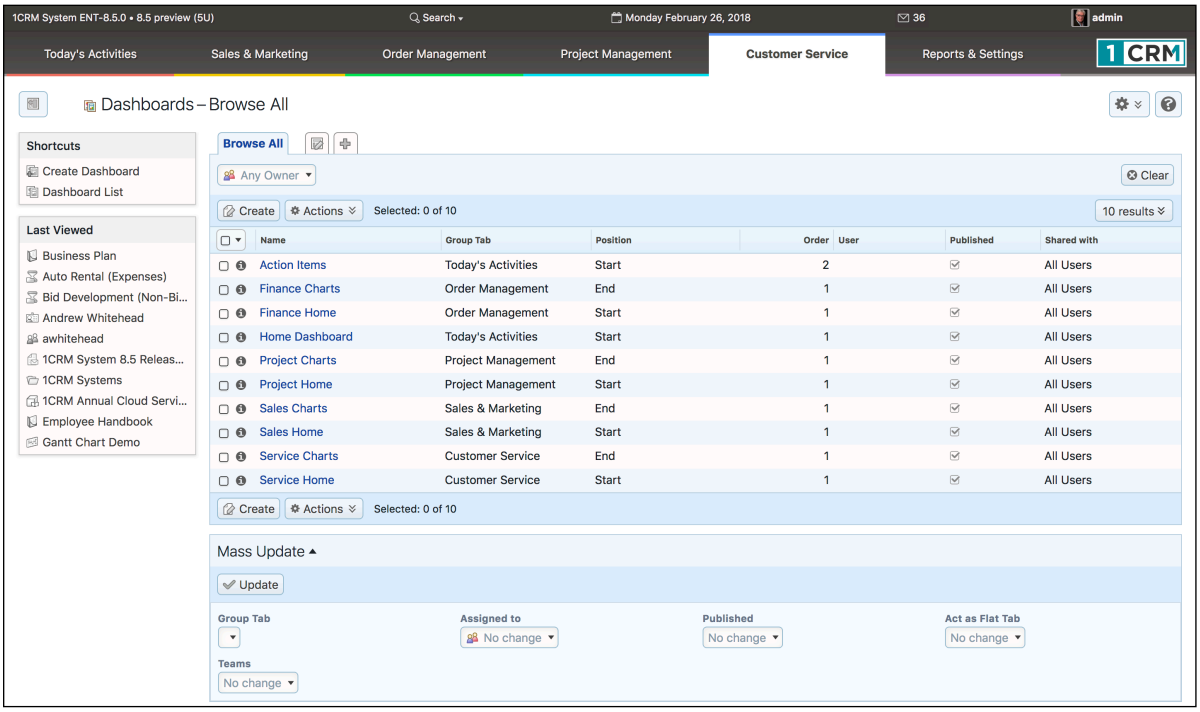


Figure 267: The Dashboards Module

The Dashboards module lists the dashboards defined within your 1CRM System. Each dashboard may be viewed or edited from this list view of the various dashboards in your system. The Figure above shows the default dashboards defined in each system. New dashboards may be created using the *Create Dashboard* shortcut.

By default, each 1CRM installation has two dashboard pages in the *Today's Activities* tab group - the *Home Dashboard* and *Action Items*. In most of the other tab groups (*Sales & Marketing*, *Order Management*, *Project Management* and *Customer Service*) there are also two dashboards by default. *Sales & Marketing* has a *Sales Home* dashboard and a *Sales Charts* dashboard, for example. *Sales Home* is at the start of the tab group, and *Sales Charts* is at the end, and the same sort of arrangement exists for the other tab groups mentioned.

Each dashboard page has basic dashboard information defined for it, as well as a layout. The dashboard info may be set by using the Dashboards module, or by clicking on the *Edit* button at the top of any dashboard page (see Figure above), and choosing the *Edit Dashboard Info* option from the four options presented. Once you do this, the following screen will be displayed:

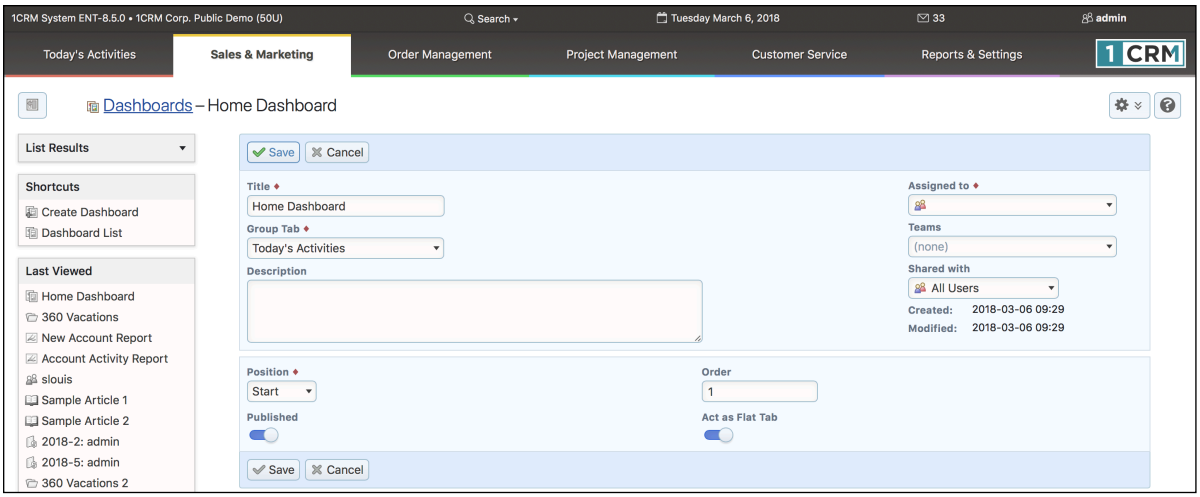


Figure 268: Setting Dashboard Information

On the Figure above, you can enter a new *Name* for the dashboard, choose the *Group Tab* in which it is to appear, and the position (*Start* or *End*) within that Group Tab. The *Order* value is used if for example 2 or 3 dashboards are defined as going at the Start of the same Tab Group. The *Published* checkbox controls if the dashboard is displayed or not. And *Act as a Flat Tab* controls if the dashboard is to be displayed when a theme is in use that either does not offer tab groups, or has been set to simple *Modules* navigation, not *Grouped Modules*.

For more information on editing dashboard content and layout, and about the variety of dashlets available within 1CRM, please see *Section 4.1: The Home Dashboard*.

9.3 The Activity Log Module

Figure 269 shows the 1CRM screen with the Activity Log Module selected:

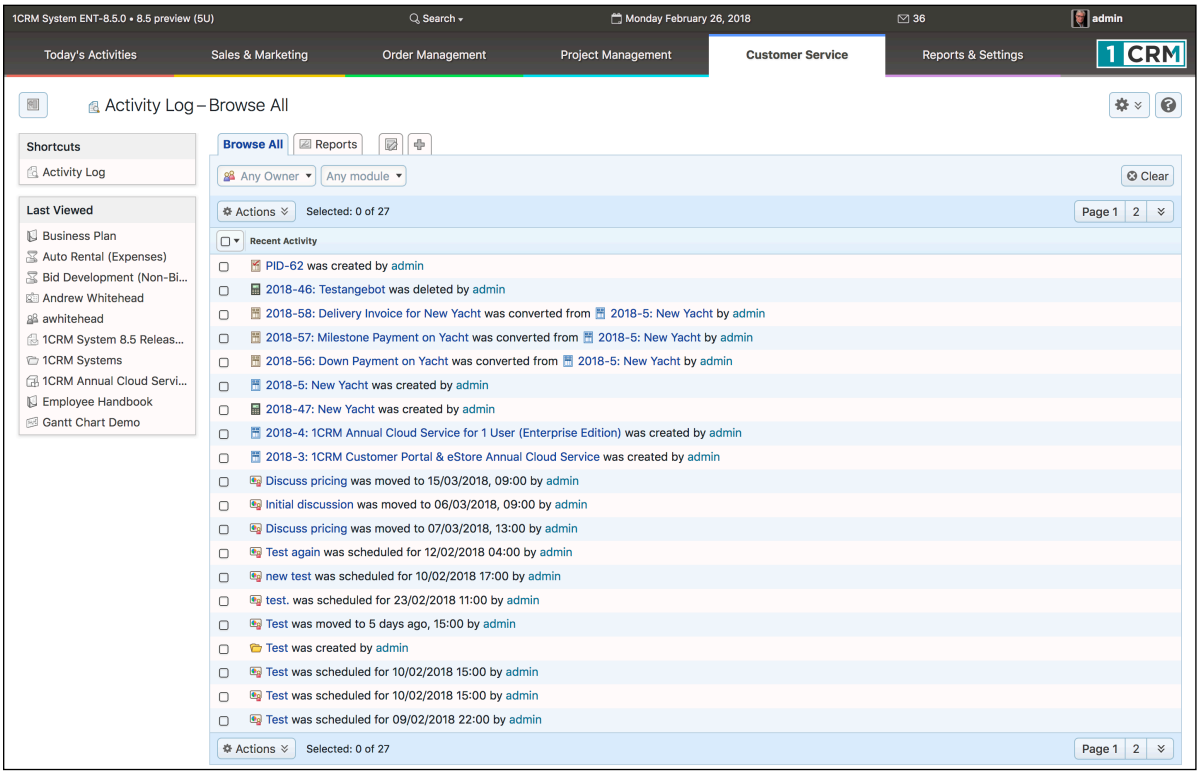


Figure 269: The Activity Log Module

The Activity Log module provides the ability to see what users (predominantly, those in Sales) are doing within 1CRM. When Users create a new item in any of these modules - *Accounts*, *Contacts*, *Leads*, *Cases*, *Tasks*, *Calls*, *Meetings*, *Opportunities*, *Projects*, *Bugs*, *Quotes*, *Sales Orders*, *Invoices* and *Payments* - a record of that action is added in the Activity Log module.

The Activity log also tracks when Opportunities are converted to Quotes, Quotes to Sales Orders, and Sales Orders to Invoices. As well, when Opportunities are Won or Lost, Meetings or Calls are re-scheduled (*Moved*), when Invoices are Cancelled, and when several types of items are Closed or Re-opened, the system will note that Activity.

When you design Reports, or Custom List View tabs in this module, you can filter by user, or by the module affected, and really see what's going on within the system.

There is also an Activity Log dashlet provided, which allows you to access the same type of information within a dashboard layout.

This module is useful as a guide to where you do and do not have any issues regarding adoption of the system. It can also be a guide to which sales people are the most and least busy!

9.4 The System Bulletins Module

Figure 270 shows the 1CRM screen with the System Bulletins Module detail view displayed:

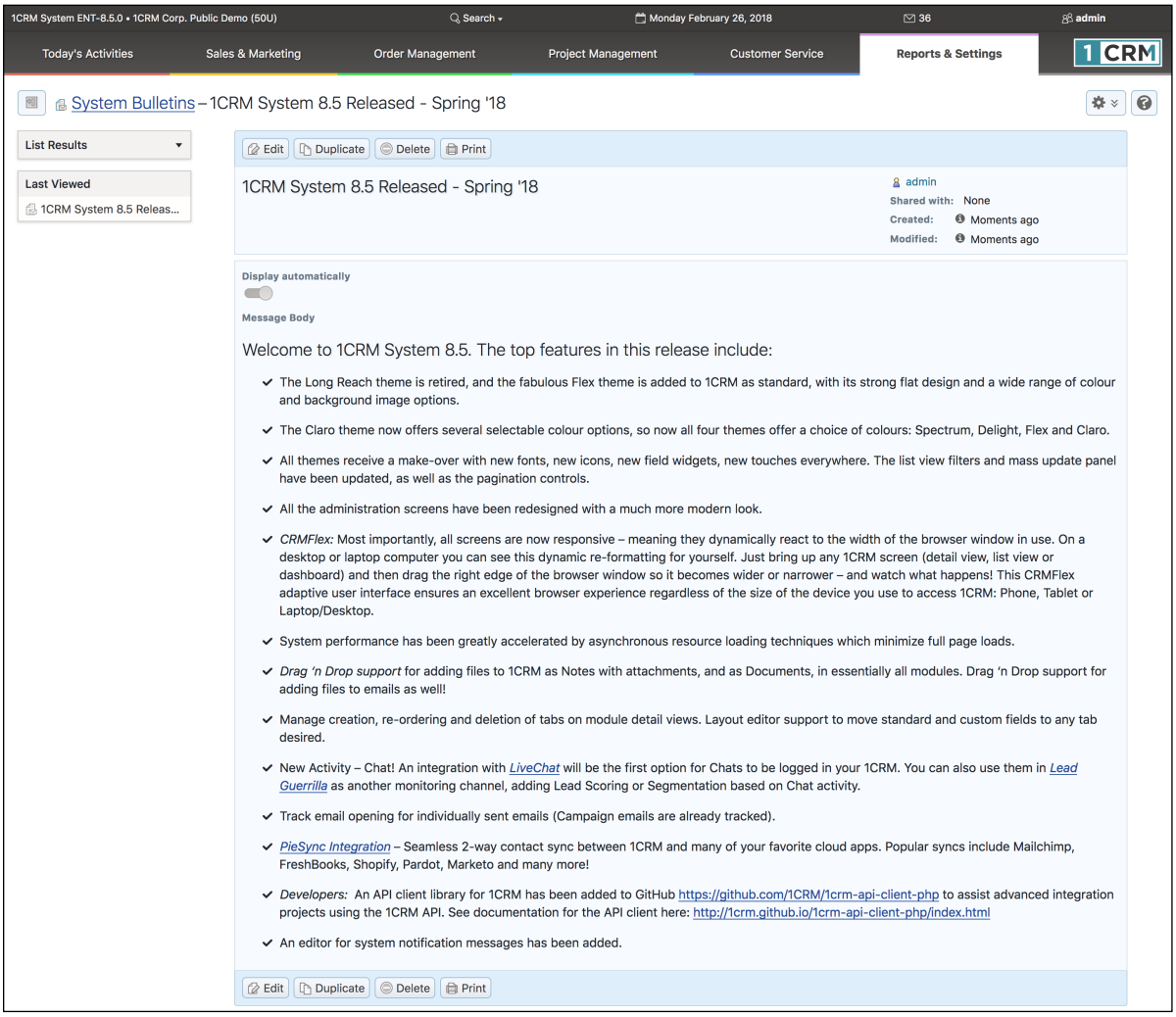


Figure 270: The System Bulletins Detail View

The System Bulletins module is used to post news messages to all system users about things such as system upgrades, planned outages, or any other news items that concern the 1CRM system. A dashlet is provided to make these messages easily visible, and you can prepare these messages using the module itself.

The checkbox *Display automatically* on any message will cause that message to be shown as a popup to each user with whom the message is shared, after their next login.

The *Shared with* dropdown on each message lets you choose if the message is to be shared with *All Users*, the members of *Selected Teams*, or *None*.

9.5 The Data Privacy Module

Figure 271 shows the 1CRM screen with the Data Privacy Module list view displayed:

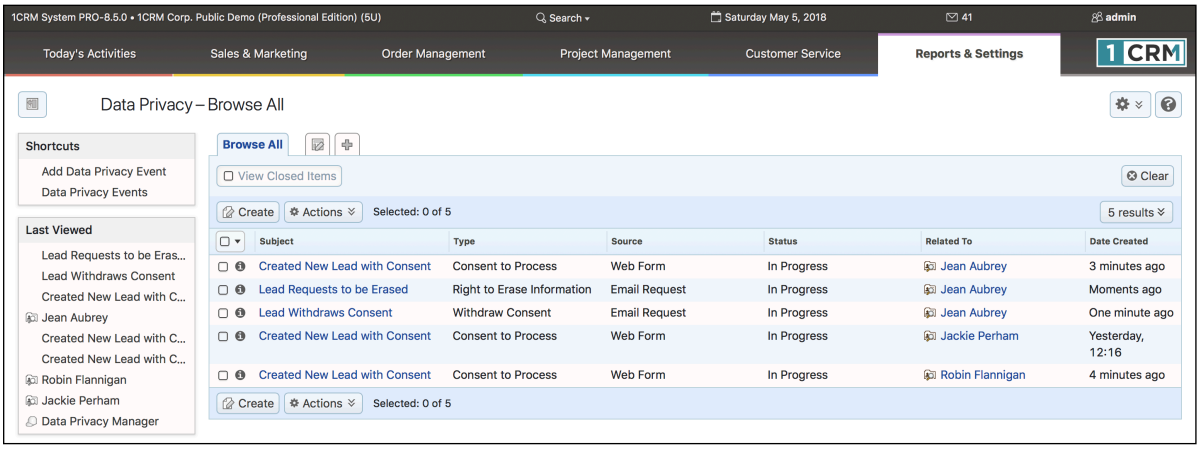


Figure 271: The Data Privacy Activities List View

This module is used to manage all 1CRM Data Privacy Activities. These include Request to View, Right to Erase, Consent to Process and Withdrawal of Consent. See more details in the 1CRM and GDPR document.

Note: Most users cannot access this module. To use this module a user must be added to the special Data Privacy Manager Role by the system administrator.

10.0 Your User Profile

10.1 My Account

To enter your own User profile screen, click the My Account link *(see highlighted item 1, on Figure 281 below, which shows the General tab of the User profile screen)*. The highlighted items 2 & 3 show the *Duplicate* button and the *Access Control* tab, which are only present for Users with Administrator capability. The *Duplicate* button allows an Administrator to duplicate a User account record (and then edit it briefly) as a quick way of creating a new User. The *Access Control* tab may be used by an Admin to control which data within 1CRM you will be able to see, and what you will be able to do with it.

As discussed in the section on *Managing Your Password*, the Change Password button should be used periodically by each User of the system to change their User password.

To edit the User profile, and change User preferences, click on the tab that relates to the area you are interested in, then on the Edit button on that tab. The 5 tabs in your user profile collectively let you define:

General Tab:

1. Header information (First and Last Name, Status, and User Name)
2. User Information (email address, title, department, and phone numbers)
3. User Settings
4. Service Skills
5. Submit User Photo (Your 75x90 pixel User Photo)

Display Options Tab:

6. Locale Settings
7. Layout Options
8. Theme Options

Email Options Tab:

9. Email Options
10. Outbound Email Settings
11. Monitored Mailboxes (Not set in the edit mode, but by using a button on the detail view)

Integration Tab:

12. Phone Calls
13. RingCentral Settings
14. Google Account Settings
15. Google Calendar Settings
16. Google Drive Settings
17. Google Contacts Settings
18. CRMSync: CardDAV Server Options

19. CRMSync: CalDAV Server Options
20. DropBox Integration Settings
21. LiveChat Integration Settings (if enabled in Admin)
22. Online Meeting Credentials (GoToMeeting, Zoom, Microsoft Teams, … if enabled in Admin)

These groups of information are known collectively as the User Profile.

10.1.1 Header Information

The header information is fairly straight-forward. It sets the system user's first and last names, and their system username. Also set here is the user status, which is one of the following values:

- Active – An active user that counts towards the system's limit of licensed users.
- Inactive – A user that may shortly become active, or perhaps was once active but is on leave, or has left the business. Inactive users do not count towards the system's limit of licensed users, and they may not login.
- Info Only – A user that is in the system only for documentation purposes. They may be viewed in the Company Directory, and an HR file may be created for them, but they may not login, and they do not count towards the system's limit of licensed users.

10.1.2 User Information

In this section, a number of items of user information are entered, including Employee Status, Title, Department, office and mobile phone, fax, Instant Messaging (IM) info, and the user to whom you report. This last item is quite significant, as it affects who can see your data within the 1CRM system, as well as how your sales forecasts roll-up if you are in Sales.

Note: Much of the information in this section and the Header Info will be publicly available in the Company Directory.

Two-Factor Authentication (2FA)

This section also contains a control to enable 2FA for this user. 2FA is useful to enhance the access security for your 1CRM user account, and for the system as a whole. You start the process of enabling 2FA by clicking on the *Enable* button. You see a Welcome screen, the first screen in a popup wizard process for enabling 2FA. This screen will suggest a series of smartphone apps you can use with the 1CRM 2FA feature, such as Microsoft Authenticator, Google Authenticator, Authy, LastPass Authenticator and 1Password.

Click to advance to the next screen, and you'll see a series of recovery codes - you MUST copy these and save them in a safe and secure location, as if you lose access to your smartphone, they are the only way to recover access to your 1CRM login.

Once that's done, proceed to the next screen, where you'll see a QR code to scan with your chosen smartphone app. When you do scan it, your app will show you a 6-digit code, which will only be valid for a short time, after which it will generate a different code. While it is valid, paste the code into the field provided, and click on *Enable*.

Two-Factor Authentication will now be shown as Enabled on the My Account General tab. Now just click on Save to save your user profile, and you're all done setting up 2FA.

10.1.3 User Settings

User Settings include such items as check boxes for Administrator rights and inclusion in the Company Directory. (***Note:*** Only Users with Administrator capability are able to check these off.)

Other User Settings include:

- Receive Email Notifications (if selected, you receive an email when you are assigned a responsibility)
- Notify on Case changes (if selected, you receive an email when information on one of your Cases changes)
- Display reminder (if selected, you receive on-screen pop-up reminders when meetings are approaching)
- List Export Format (choose the file format to use in your exported files)
- Import/Export character encoding (to support international character sets)
- Show full name (use full name when referring to users rather than the system username)
- File Download Mode (download file, or display in browser)

10.1.4 Service Skills

Any number of Service Skills may be defined here. They are used for the assignment of service cases to service personnel with the appropriate skill set. Cases may be rated for the skills required, just as users may be rated for their skill sets. Skills relevant to your business are defined in Service Skills, within the Users section of the Admin page.

Use the

button to add a skill to a user profile (only Admins can do this.). You will need to select the skill, and the rating. The rating is a positive integer, and the greater the skill level, the greater the number. Typically a business may use skill levels of 1 to 3, 1 to 5, or 1 to 10.

10.1.5 Submit User Photo

Use this section to upload a 75 x 90 pixel photograph for display in the Company Directory.

10.1.6 Locale Settings

1CRM has substantial international localization capabilities. While the system has defaults for all these settings, in this section you may select your own personal settings for:

- Date and time formats
- What time zone you are located in (it will default to where your server is)
- Currency (this sets the number of decimal places used for currency values, the currency symbol and several other related values)
- Number format (this sets the thousands and decimal separators)
- The format in which to display names – for example Salutation, First Name, Last Name would be the *s f l* option
- The format in which to display addresses – there are formats for Britain/Canada/USA, France, Germany, and Japan. The different formats are used to display addresses on screen, and in PDFs such as Quotes and Invoices.

- The first day of the week (used in formatting the calendar date selector, for example). It may be Sunday or Monday or indeed any other day, although we don't know of anywhere that uses anything but Sunday or Monday!
- Start and end times for the business day – used to format the daily and weekly calendar displays.
- Select the Holidays you wish to have displayed on your calendars - may be set to System Default (as selected in System Settings by the Admin) or to a specific Holidays pack loaded on the system by the Admin.

10.1.7 Layout Options

Using Layout Options, users can modify what tabs they see when logged in. Administrators define the master list of available tabs for all users in the administration screens, but users can then modify their own tab list by removing any unneeded tabs.

As well, layout options control:

- **Display Tabs** – Controls which of the system's modules that are accessible by you that you wish to have displayed in your user interface
- **Number of tabs** – The number of tabs shown across the top of the page before the rest are listed on an overflow dropdown at the end
- Number of sub-tabs – The same, but for the sub-tabs used when the Grouped Modules option is active
- **Sub-panel tabs** – If this option is selected (which it is by default) the sub-panels shown on the detail view for each module are grouped into tabs, which may be selected one at a time. This makes the screens not nearly so long, and ensures that the sub-panel data most important to you is closer to the top of the screen.
- **Last viewed on side** – If this option is selected, the Last Viewed list is shown on the left side of the screen, rather than as the pop-down list which it is by default. Not relevant to all themes.
- **Shortcuts on top** – Moves shortcuts to the top, rather than the left side. Not relevant to all themes.
- **Navigation Paradigm** – A very important option, the navigation paradigm may be set as Modules or Grouped Modules. The Modules option shows a one-level menu system across the top of the screen, or down the left-hand side, depending on the theme selected. When Grouped Modules is selected with the Spectrum theme, the system offers a two-level menu system across the top of the screen, as shown in all sample screen images in this User Guide. When the Grouped Tabs option is in effect, the grouping of the tabs is controlled by the Studio function *Configure Group Tabs*.
- **Module Links in Footer** - If checked, links for all the modules will appear in the footer of the screen layout.

10.1.8 Theme Options

The Theme Options section is where the user can edit their preferences that are applicable to OceanVue only. The theme options settings allow the user to:

- **User can Create Themes -** This checkbox defines whether user can create their own customer themes in the Theme Designer
- **Dark Mode Control -** This defines whether the Dark Mode option appears in the dropdown menu.

- **Automatic Dark Mode** - This settings has three options. *Disabled:* No automatic dark mode is in effect. *Use System Settings:* 1CRM will use the local device to determine whether to use dark mode or not. *Time Based:* This will display two more fields, one for when light mode will start and another for when dark mode will start.

10.1.9 Email Options

Email Options are used to configure many aspects of your email capabilities within 1CRM. The options are as follows:

- Email address – sets your email address. If not set, you cannot receive any system notifications.
- Other email address – used as documentation only.
- Reply-to name – sets the reply-to name as seen by the recipient of your emails.
- Reply-to address – sets the email reply address for all the emails you send.
- Auto BCC Address - If a valid email address is entered here, every email you send from 1CRM will automatically be blind copied to this email address. (Very handy for making sure your main email client gets a copy of every email you send from 1CRM.)
- Signature – lets you edit and save multiple text and/or HTML email signatures, and select which one is currently to be used.
- Signature above reply – controls where in your email replies the signature is to be automatically added.
- Email client – selects the use of the 1CRM email client, or an external email client, when an email address hyperlink is clicked within 1CRM.
- Outbound character set – chooses the character set encoding used for your outbound emails.
- Out Of Office – select this option when you are out of the office. Each monitored mailbox has a selector to set the email template to be used to automatically notify of your absence.
- Default Display Format – Select Text or HTML.
- Default Send Format – Select Text or HTML.
- Inline Images – These may be displayed or not, as you choose (often suppressed to reduce bandwidth use)
- Messages in Trash cleanup – Select the retention period for email sent to the Trash. Options are 5 days, 1 week, 2 weeks, 3 weeks, 1 month, 3 months, 6 months, 9 months, and 1 year.
- Received messages without associations cleanup – select the retention period for received emails that are not related to any other data in the system (normally valuable emails will be related to an account, a contact, a lead, a project – something!).
- Received messages with associations cleanup - select the retention period for received emails that are related to at least one other item of data in the system.
- Sent messages without associations cleanup - select the retention period for Sent emails that are not related to any other data in the system.
- Sent messages with associations cleanup - select the retention period for Sent emails that are related to at least one other item of data in the system.

10.1.10 Outbound Email Settings

In this section you must select *Sendmail* or enter your SMTP user and server settings, so that you can use Email within 1CRM to send outgoing email. If your server has been set up to use *Sendmail*,

then you simply select that as the Mail Transfer Agent (MTA), and you're done. The server has already been taught how to send mail and you are just telling the server to take care of it. (***Note:*** In the 1CRM Cloud, always use the SMTP option.)

If you need to use SMTP, you have two ways to proceed:

- Click on Quick Setup if you use a common email service such as GMail/Google Apps, Outlook, AOL, iCloud or Yahoo.
- Manually define your SMTP Settings.

Defining SMTP Settings Using Quick Setup

Click on Quick Setup and select the applicable email service from the options provided. In this example, we will choose Gmail.

Figure 272: Quick Setup Email Options

Now you'll see a small dialog popup asking you to enter your email address and password:

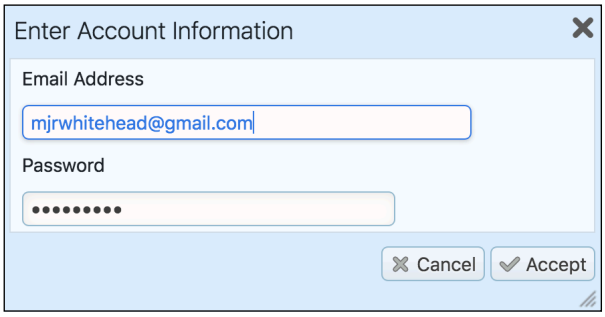


Figure 273: Email Quick Setup - Account Information

Enter that information, and click on OK, and you'll see a screen much like the Figure below. Just click on *Save* to save your Outbound email settings.

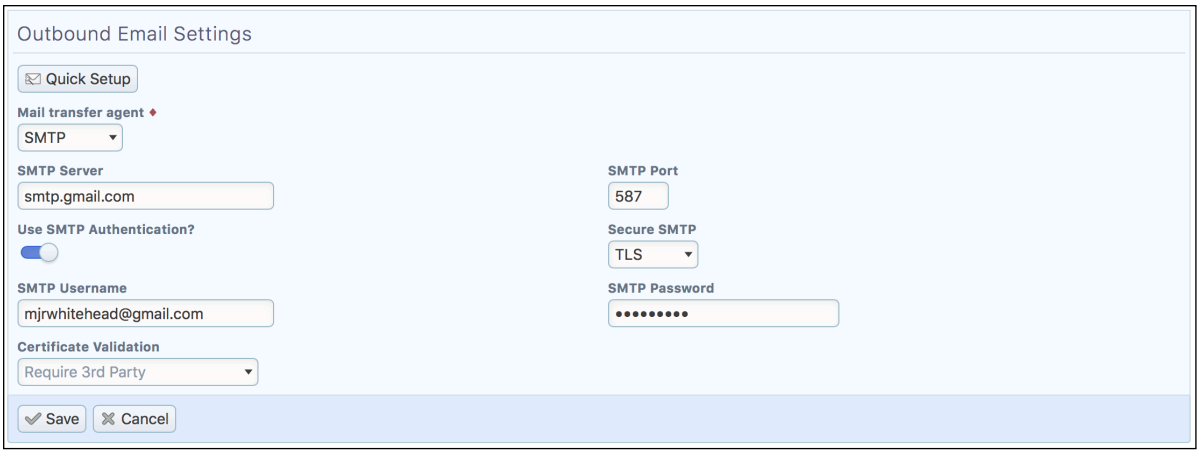


Figure 274: Using Gmail for SMTP

Defining SMTP Settings Manually

If none of the Quick Setup options apply to you, then you must manually define your SMTP Server name, and SMTP Port number (usually 25). If *SMTP Authentication* is required by your SMTP email server, you need to specify that, and enter the *SMTP Username* and *Password* you use to access it.

You can use SSL (Secure Socket Layer) to ensure all data transferred to the SMTP server is encrypted (of course, in this case the SMTP server you are using must support SSL connections). To do so, simply select *SSL* from the *Secure SMTP* dropdown. Also note that SMTP servers usually use a port number different from 25 for accepting SSL connections, often port 925.

Another option for *Secure SMTP* is TLS (Transport Layer Security), which performs a similar job to SSL. The most common use of TLS is for Google's Gmail. To use GMail for sending your email, use *smtp.gmail.com* as the SMTP host name, select *TLS* from the *Secure SMTP* dropdown and use port 587, as seen above. (These settings were done by Quick Setup, as it covers GMail.)

If *Secure SMTP* is set to either *SSL* or *TLS*, you will also need to set the *Certificate Validation* dropdown. Email servers should have certificates to confirm their identity. This dropdown sets the conditions under which 1CRM will allow an email to be sent via the specified SMTP server. Available options are: *None* (Send email even if no certificate on the server), *Self-Signed OK* (At least a self-signed certificate is required in order to send email), and *Require 3rd Party* (3rd Party Signed Certificate required to send email).

Special Notes for Using Two-Factor Authentication With Email

If you have enabled two-factor authentication for your email account, configuring your email account for use within 1CRM is a bit more complicated, as typically you will need to generate an application-specific password. See here (Office 365 2FA Notes) for a document that describes how to generate an application-specific password for use with Office 365. (Other systems have a similar process.) Once you have created that password, you use it in these instructions just like your normal email password.

Special Notes for Using GMail

After you use the above screen to setup 1CRM properly to work with GMail/Google Apps you are not quite done yet. Google have decided that anything other than their own email clients are insecure ways to access your email. So you need to go into your Google *My Account* settings, select *Sign-in & Security*, scroll to the very bottom of that screen and toggle ON a switch called *Allow Less Secure Apps*. You may also have to go here, and follow instructions to allow sign-in from a new device.

10.1.11 Monitored Mailboxes

Each user may edit the Monitored Mailboxes from which they wish to receive email delivery within 1CRM. Click on the Create button on the Email Options tab of the My Account screen to add a new POP3 or IMAP email account.

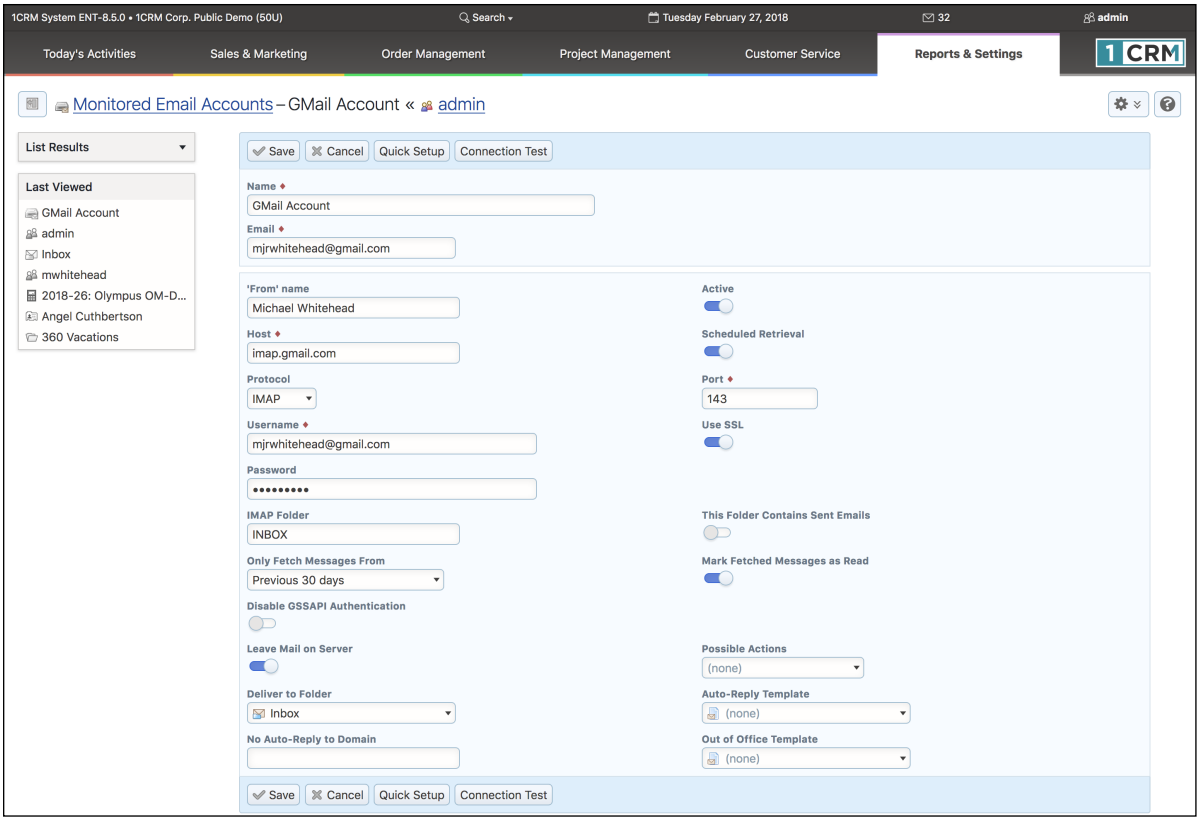


Figure 275: Adding a Monitored Mailbox (Gmail example)

On the screen above, the *Name* field is used to enter the name by which you refer to your email account, such as Company Email, Yahoo Email, etc.. The *Active* check box may be unchecked to leave the details of the mailbox in your configuration data, but temporarily inactive. When it is checked, this mailbox will be read whenever you use the *Check Email* function, or the email scheduler task is run. *From Name* should generally be set to your full name - first and last.

Similar to the way it works for defining *Outbound Email Settings*, you have a Quick Setup button here to speed the process of defining your new *Monitored Mailbox*. If you use a common email service such as GMail/Google Apps, Outlook, AOL, iCloud or Yahoo simply click on Quick Setup and select the applicable email service from the options provided. You'll see a small dialog popup asking you to enter your email address and password. Enter that information, and click on OK, and you'll see a screen much like the Figure above.

If your email provider requires the use of Modern Authentication you may also select either Office365 oAuth or Gmail oAuth from the Authentication Type dropdown, you will then see a Obtain New Token button that you should click to finish your authentication with your provider.

Note: You must have completed both the initial setup of Modern Authentication as per the Implementation guide, as well as be ***logged in*** to your provider to ensure you are fetching the correct token.

How should users change their email habits and setups once they become regular CRM users? We recommend most users adopt the following solution: (more details in the *Implementation Guide*)

1. Users should keep using their current email client for day-to-day email.
2. Link their email client software to their email server using the IMAP protocol.
3. In each user's email client, create a folder called CRM. Because of how IMAP works, this will create a CRM email folder on the email server for that user as well. (If using Gmail, create a new Label with the name CRM.)
4. Every time a user has an email they feel should be filed in the CRM, they drop a copy in the CRM folder within their email client.
5. Through IMAP, this will put that email in the CRM folder for that user on the email server.
6. Create a 1CRM Monitored Mailbox that retrieves email using IMAP from that email account for that user - not from folder INBOX, but from folder CRM (this is the key to this approach!).
7. Now - every email that is dropped in the CRM folder in any user's email client will turn up in the CRM automatically - and will be automatically linked to any related Leads, Contacts or Accounts, as well as to the User that filed it in the CRM.
8. Users are free to use the CRM to send emails to customers. Records of campaign emails are only kept within the CRM, but to make sure that other individual emails composed within the CRM and sent to customers are also filed within the user's normal email client, the CRM should be configured to blind copy to the user's normal email account every individual email sent out from the CRM. (1CRM has an *Auto-Bcc* option you can set to do this.)
9. Finally, you can if you wish add another Monitored Mailbox to monitor your Sent items folder. If you do, check the box marked *This Folder Contains Sent Emails*, and select *Sent* as the *Deliver to Folder*. This will bring in to 1CRM all the emails you send using another email client, correctly mark them as Sent emails, and drop them in your Sent folder in 1CRM.

Implemented properly, this solution addresses all of the initial considerations for an email solution, and obviates the need for administratively intensive, and sometimes unreliable email client plugins.

10.1.12 Phone Calls Settings

With this setting each user may set a preference for dialling when using 1CRM in the browser of their Smartphone via the CRMFlex capability. There is only one setting in this section - *Call method when using a mobile device*. This is a dropdown offering just two options:

- Choose *Use the Global preference* if you want to use an app on your Smartphone which corresponds to the Global IP telephony setting your admin has selected in *Admin - Locale Settings.* For example if the Global preference is set to Skype, and you want to place 1CRM phone calls from inside your Smartphone browser using Skype, and you have installed and configured the Skype app on your Smartphone, then this is the setting you will want. All the same information applies similarly for the RingCentral option.
- Choose *Use the built-in phone* if regardless of the Global IP telephony setting selected in *Admin - Locale Settings* you wish to place 1CRM phone calls from inside your Smartphone browser using the phone built into your device.

10.1.13 RingCentral Settings

Each user planning to use RingCentral must edit these RingCentral settings:

- Your *Direct Phone Number*
- *Expand RingCentral Window on Incoming Call* (see section on Receiving RingCentral Calls)
- *Press 1 to Start Call* option (checkbox to Enable / Disable)

Your administrator should be able to provide your phone number.

Note: This section is only displayed if RingCentral is selected in *Admin - Locale Settings*.

10.1.14 Google Account Settings

In order to allow 1CRM access to Google services, 1CRM must be authorized first. Click the *Authorize* button to go to the Google web site. When a popup window opens, click *Accept* to generate an access token. Copy the generated token, and paste it into the box to the left of the *Authorize* button, then click on *Save*. You may need to login to your Google account first.

If everything is successful, you will see the message in green *1CRM system is authorized to access Google services*.

Note: For this Google account synchronization of Calendar, Contact and Google Drive data to operate properly, your Administrator must have set the Scheduler running, with the *Sync Google Calendar Events*, *Synchronize Google Contacts* and *Synchronize Google Drive* scheduler entries enabled. A run interval of 15 minutes is the recommended value.

10.1.15 Google Calendar Settings

Use the *Sync Setting* dropdown to choose if the flow of data is one way from 1CRM to Google, or the reverse, or two way. You may also disable the sync by choosing the - *Sync Disabled* - option.

You may choose which calendar items (Calls, Meetings, Tasks) are synchronized between Google and 1CRM:

- For Meetings you can choose *No Sync*, *Assigned To Me*, or *Meetings I Am Invited To*.
- For Calls you can choose *No Sync*, *Assigned To Me*, or *Calls I Am Invited To*.
- For Tasks you can choose *No Sync* or *Assigned To Me*.

Note: New activities created in Google are synchronized into 1CRM as Meetings.

You may also need to enter your Google Calendar ID. Leave this field blank if you want to sync with your main Google calendar. But if you have additional calendars, you can choose to sync with one of them specifically by entering its Google calendar ID in this field.

10.1.16 Google Drive Settings

Use the *Sync Setting* dropdown to choose if the flow of data is one way from 1CRM to Google, or the reverse, or two way. You may also disable the sync by choosing the - *Sync Disabled* - option. Dropdowns are available to select the file formats in which Documents, Spreadsheets and Presentations are downloaded from Google Drive to 1CRM.

10.1.17 Google Contacts Settings

Use the *Sync Setting* dropdown to choose if the flow of data is one way from 1CRM to Google, or the reverse, or two way. You may also disable the sync by choosing the - *Sync Disabled* - option. You can either sync all the contacts you can see, or only the contacts you are assigned. Note that a maximum of 50 entries are transferred per sync to manage server load.

An important tip for those using Google Contact Sync: In Gmail settings, General tab - there is an option called *Create contacts for auto-complete*. Please set that option to *I'll add contacts myself*. This lets 1CRM push the Contact info to sync with Google. Otherwise Google will find the Contact already exists and will block the sync from 1CRM of that contact.

10.1.18 CRMSync for Contacts (CardDAV Server)

The CRMSync feature in 1CRM uses a CardDAV server to provide excellent Contact data exchange capabilities. To use the CRMSync feature, simply set the option here to choose what Contacts to sync: *Assigned To Me*, *All I Can See* or *My Favorites*. Enable *Automatically create Accounts* if you would like incoming synched Contacts to create new Accounts for the company names in their Contact records, if they do not already exist as 1CRM Accounts.

Next, in any other system that supports CardDAV, such as Contacts on macOS, or iOS (for iPhone and iPad), Android phones and tablets, or Microsoft Outlook (via a number of Outlook add-on options), simply subscribe to the CardDAV service using the *Principal* or *Address Book* URL, as shown in Figure 284 below (but of course use the actual *Principal* URL value shown on your own *My Account - Integration* tab).

Syncing Contacts Using CRMSync and iOS (10.1) for iPhone & iPad

In iOS go to the general *Settings* screen (using the Home screen icon for *Settings*) and scroll down to select *Contacts* in the left column. Tap on *Accounts*, then on *Add Account*, and select *Other* for the kind of Account. Then choose *Add CardDAV Account* under Contacts (See Figure 276.)

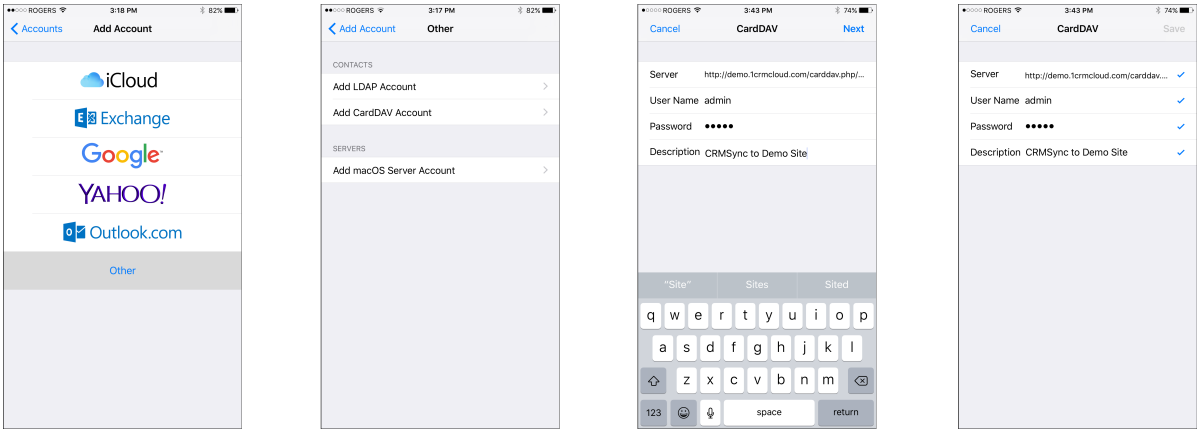


Figure 276: Using CRMSync for Contacts on an iPhone

Enter your *Server* name using the *Principal URL* as illustrated in Figure 284 below, but of course use the actual *Principal* URL value shown on your own *My Account - Integration* tab in the *CRMSync (CardDAV Server)* section. In our example above we enter:
http://demo.1crmcloud.com/carddav.php/principals/admin.

Then enter the *User Name* and *Password* you use to login to 1CRM. (If you have set the optional *DAV Password*, then use that password instead of your normal one.) Enter any *Description* you like or leave the default, then click on *Next*. Your account settings will be verified, and if they check out properly you are all done. Your 1CRM Contacts should now become visible within the Contacts app. You can edit them either in 1CRM, or in Contacts, and the changes will be reflected everywhere.

Note: This provides a great *offline* mode for all your 1CRM Contact data. On your iPhone or iPad you can add new contacts, or edit existing ones, even while offline. Once you are back online any changes will be sync'ed back up to your 1CRM server.

Syncing Contacts Using CRMSync and macOS (Sierra)

In macOS go to the *Contacts* application and choose *Add Account* from the *Contacts* menu option. From the options presented, choose *Other Contacts Account..*, and click on *Continue*.

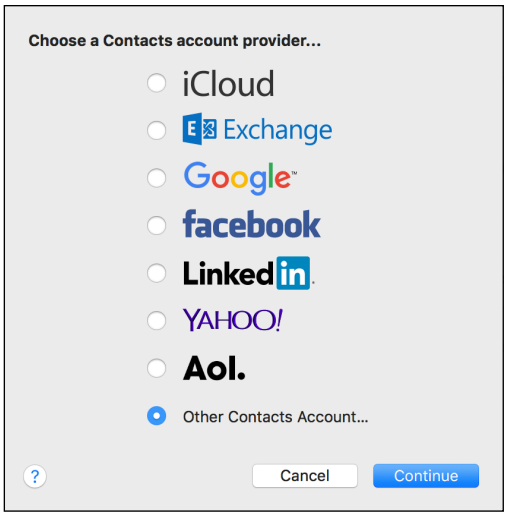


Figure 277: Using CRMSync with macOS (CardDAV)

Choose *CardDAV* from the first dropdown option, and *Advanced* for your Account Type. Then enter your 1CRM login *User Name* and *Password*. (If you have set the optional *DAV Password*, then use that password instead of your normal one.) Leave Port as Auto, and check the *Use SSL* option if it is available on your 1CRM server (it is available if you are using the 1CRM Cloud).

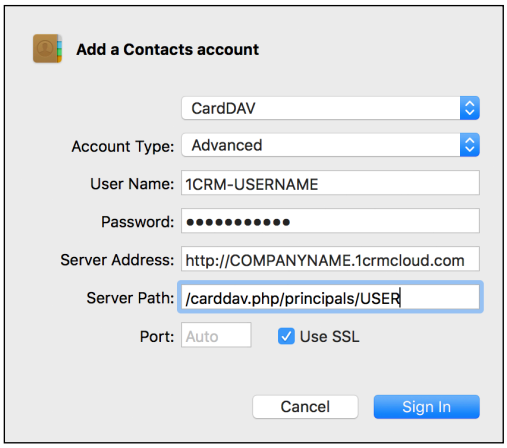


Figure 278: Using CRMSync with macOS (CardDAV)

Then enter your *Server Address* and *Server Path*. Use the *Principal URL*, as illustrated in Figure 284 below, but of course use the actual *Principal* URL value shown on your own *My Account - Integration* tab in the *CRMSync (CardDAV Server)* section. Split the URL into the *Address* and *Path* sections, as shown in the Figure above. In our example here we use: http://COMPANYNAME.1crmcloud.com and /carddav.php/principals/USER.

Click on *Sign In*, and you are finished - your 1CRM Contacts should now become visible within the Contacts application. You can edit them either in 1CRM, or in Contacts, and the changes will be reflected everywhere.

Syncing Contacts Using CRMSync and Android (Android 8 - Oreo)

In the Google Play Store you will find a few solutions known to work. You can search for *CardDAV*, and install the *CardDAV-Sync free* app by dmfs.org, which we document here. (Or the DAVX5 app is

also an inexpensive solution known to work well.) When run it automatically displays the *Add Account* screen. Select *CardDAV* as the type of Account.

Enter your *Server* name using the *Principal* URL, as shown in Figure 284 below, but using the *Principal* URL shown on your own *My Account - Integration* tab in the *CRMSync (CardDAV Server)* section.

In our example here we use http://demo.1crmcloud.com/carddav.php/principals/admin.

Then enter the *User Name* and *Password* you use to login to 1CRM (if you have set the optional *DAV Password*, then use that password instead of your normal login password), then click on *Next*. Your account settings will be verified, and if they check out properly you just need to add an account name, and to uncheck *Sync from server to phone only*. Then click on *Finish* and you are all done. (The app will ask you to carry on and tune up your sync settings, which you may well want to do.)

Your 1CRM Contacts should now become visible within the *Contacts* app. It may take a while for all of your contacts to sync if you have a lot of them. You can edit these contacts either in 1CRM, or in *People*, and the changes will be reflected everywhere.

Note: This provides a great *offline* mode for all your 1CRM Contact data. On your Android phone or tablet you can add new contacts, or edit existing ones, even while offline. Once you are back online any changes will be sync'ed back up to your 1CRM server.

Syncing Contacts Using CRMSync and Microsoft Outlook

To use *CRMSync* to sync 1CRM Contacts with Microsoft Outlook 2007/2010/2013/2016, we recommend the use of:

- Memotoo Premium - $18/user/year (syncs to many other services as well)

Note: Full instructions on using Memotoo with 1CRM are on the Memotoo page of our website.

Note: Once you have added a CardDAV account with server address, user name and password, and have the account sync'ed with 1CRM, do not change the user name in your CardDAV client. If you need to sync to another 1CRM user, or if you change your user name inside 1CRM, create a new account in your CardDAV client on iOS, macOS, Android, or Outlook. Otherwise the sync may not work properly.

10.1.19 CRMSync for Calls, Meetings, Tasks (CalDAV Server)

The CRMSync feature in 1CRM also offers a CalDAV server to provide data sync capabilities for 1CRM Calls, Meetings and Tasks. To use the CRMSync feature for Calls and for Meetings, simply set the dropdown options here to choose what Calls and Meetings to sync: *Assigned To Me*, *All I Am Invited To* or *All I Can See*. For Tasks your options are just *Assigned To Me* and *All I Can See*.

Then in any other system that supports CalDAV, such as *Calendar* and *Reminders* on macOS, or iOS (for iPhone and iPad), Android phones and tablets, or Microsoft Outlook (via a number of Outlook add-on options), simply subscribe to the CalDAV service by using your login credentials for your 1CRM server (if you have set the optional *DAV Password*, then use that password instead of your normal one) plus one or more of the CalDAV URLs as shown in Figure 284 below. Of course, use the actual *Principal* URL value shown on your own *My Account - Integration* tab in the *CRMSync (CalDAV Server)* section.

Different applications use different URLs. For example, the macOS Calendar app requires the Principal URL, and adds all 3 calendars. In Mozilla Sunbird, you add all 3 calendars separately, using the corresponding URLs for Calls, Meetings and Tasks.

Syncing Calendars Using CRMSync and iOS (10.1) for iPhone & iPad

In iOS go to the general *Settings* screen (using the Home screen icon for *Settings*) and scroll down to select *Calendar* in the left column. Tap on *Accounts*, then on *Add Account*, and select *Other* for the kind of Account. Then choose *Add CalDAV Account* under Calendars.

Enter your *Server* name using the *Principal URL* as illustrated in Figure 284 below, but of course use the actual *Principal* URL value shown on your own *My Account - Integration* tab in the *CRMSync (CalDAV Server)* section. In our example we enter:
http://demo.1crmcloud.com/caldav.php/principals/admin.

Then enter the *User Name* and *Password* you use to login to 1CRM. (If you have set the optional *DAV Password*, then use that password instead of your normal one.) Enter any *Description* you like or leave the default, then click on *Next*. Your account settings will be verified, and if they check out properly you are all done. Your 1CRM Calendar entries should now become visible within the *Calendar* app. You can edit them either in 1CRM, or in the *Calendar* app, and the changes will be reflected everywhere.

Note: The iOS *Reminders* app will also show your 1CRM tasks, and can also sync bidirectionally.

Note: This provides a great *offline* mode for all your 1CRM Calendar data. On your iPhone or iPad you can add new appointments or tasks, or edit existing ones, even while offline. Once you are back online any changes will be sync'ed back up to your 1CRM server.

Syncing Calendars Using CRMSync and macOS (Sierra)

In macOS go to the *Calendar* application and choose *Add Account* from the *Calendar* menu option. From the options presented, choose *Other CalDAV Account..*, and click on *Continue*.

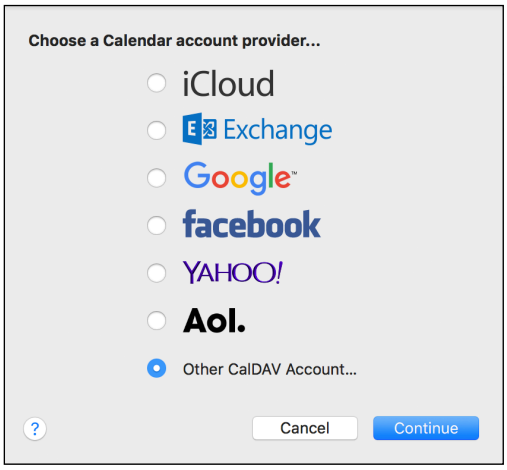


Figure 279: Using CRMSync with macOS (CalDAV)

Choose *Advanced* from the dropdown option, then enter your 1CRM login *User Name* and *Password*. (If you have set the optional *DAV Password*, then use that password instead of your normal one.) Set *Port* to 80, uncheck the *Kerberos V5* option, and uncheck the *Use SSL* option.

Then enter your *Server Address* and *Server Path*. Use the *Principal URL*, as illustrated in Figure 284 below, but of course use the actual *Principal* URL value shown on your own *My Account - Integration* tab in the *CRMSync (CalDAV Server)* section. Split the URL into the *Address* and *Path* sections, as shown in the Figure below. In our example here we use: http://COMPANYNAME.1crmcloud.com and /caldav.php/principals/USER.

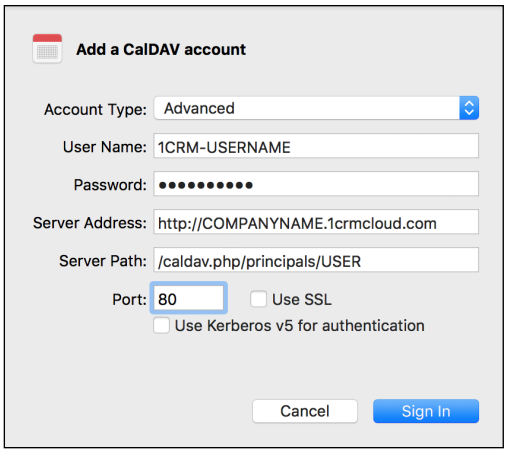


Figure 280: Using CRMSync with macOS (CalDAV)

Click on *Sign In*, and you are finished - your 1CRM Calendar should now become visible within the macOS *Calendar* application. You can edit your Calendar entries either in 1CRM, or in the *Calendar* application, and the changes will be reflected everywhere.

Note: The macOS *Reminders* application will also show your 1CRM tasks, and can also sync bidirectionally.

Syncing Calendars Using CRMSync and Android (Android 8 - Oreo)

In the Google Play Store search for *CalDAV*, and install the *CalDAV-Sync* app by dmfs.org, which we document here. When run it automatically displays the *Add Account* screen. Select *CalDAV* as the type of Account.

Enter your *Server* name using the *Principal* URL, as shown in Figure 284 below, but using the *Principal* URL shown on your own *My Account* - *Integration* tab in the CRMSync (CalDAV Server) section.

In our example here we use http://demo.1crmcloud.com/caldav.php/principals/admin.

Then enter the *User Name* and *Password* you use to login to 1CRM (if you have set the optional *DAV Password*, then use that password instead of your normal one), then click on *Next*. Your account settings will be verified, and if they check out properly you then see a screen where you must select checkboxes to indicate that both Calls and Meetings should be synced. Click Next again, then you just need to add an account name, and to uncheck *Sync from server to phone only*. Then click on *Finish* and you are nearly done. On the *Congratulations* screen you are on now, click on *Install Task App Now*. This will install OpenTasks, by dmfs.org, Your 1CRM Calendar entries should now become visible within the *Calendar* app, and your Tasks within the Tasks app. You can edit them either in 1CRM, or in the *Calendar/Tasks* apps, and the changes will be reflected everywhere.

Note: This provides a great *offline* mode for all your 1CRM Calendar data. On your Android phone or tablet you can add new appointments or tasks, or edit existing ones, even while offline. Once you are back online any changes will be sync'ed back up to your 1CRM server.

Syncing Calendars Using CRMSync and Microsoft Outlook

To use *CRMSync* to sync your 1CRM Calendar with Microsoft Outlook 2007/2010/2013/2016, we recommend the use of:

- Memotoo Premium - $18/user/year (syncs to many other services as well)

Note: Full instructions on using Memotoo with 1CRM are on the Memotoo page of our website.

Note: Once you have added a CalDAV account with server address, user name and password, and have the account sync'ed with 1CRM, do not change the user name in your CalDAV client. If you need to sync to another 1CRM user, or if you change your user name inside 1CRM, create a new account in your CalDAV client on iOS, macOS, Android, or Outlook. Otherwise the sync may not work properly.

10.1.20 DropBox Integration Settings

If you plan to make use of the integration between 1CRM and DropBox you can link to your DropBox account here. In order to allow 1CRM access to Dropbox, 1CRM must first be authorized. Click the *Authorize* button to go to the DropBox web site. When the DropBox screen appears, click on the *Allow* button to generate your access token. Copy the generated token, and paste it into the box labelled *Authorization Token* back on the 1CRM screen, and then click *Save* to save your Integration tab settings.

Note: You may need to login to your DropBox account first before doing this.

10.1.21 ConsignO Cloud Integration Settings

When your administrator has connected 1CRM to ConsignO Cloud for the purpose of Electronic Signatures you will need to go to this area to input some key information, without it you will not be able to sign or approve documents. Here, you can select which language you prefer to experience when you are interacting with the ConsignO Cloud application, which type of signature you prefer (Default will always be Electronic Signature), your second factor of authentication (SMS or Secret Question), your phone number to which you will receive the SMS second factor or secret question and answer fields.

10.1.22 LiveChat Integration Settings

For full details of how to configure the LiveChat integration, see this webpage. Your system administrator needs to enable the LiveChat integration first, and then you will see the LiveChat section on the My Account - Integrations tab.

The settings in this panel enable the 1CRM LiveChat integration to assign 1CRM chat transcript records to the correct 1CRM user matching the LiveChat agent that handled the chat.

Each 1CRM user needs to edit their *My Account* settings, on the *Integrations* tab. At the bottom of the *Integrations* tab is the LiveChat panel, where you set the LiveChat User Name to the email address of the corresponding LiveChat agent. The API key is currently not used, and can be left blank.

10.1.23 Online Meeting Credentials

If you plan to make use of the integration between 1CRM and an online web meeting service, first your administrator has to enable the service on the Company Information page in Admin.

For GoToMeeting, simply enter your personal GoToMeeting account credentials here.

For Microsoft Teams, click *Authorize* to go to the Microsoft web site. When a popup window opens, click *Accept* to generate the access token. You may need to login to your Microsoft work account first. If you do not authorize your own account here, any meeting you schedule will use the company account authorized in *Administration - Company Information*.

Note: You have to login to a work (business) account not a personal one.

For Zoom, you'll need to add the Zoom API Key and API Secret. To do so, follow the instructions in Step 2 here.

After you *Save* the *Integration* tab, the password field will change to show the system's connection status with your Online meeting account. Using this connection, 1CRM can create and remove meetings from the Online meeting system automatically as you create meetings and add or remove the checkbox for an associated Online meeting session.

10.1.24 My Account Settings Screen Images

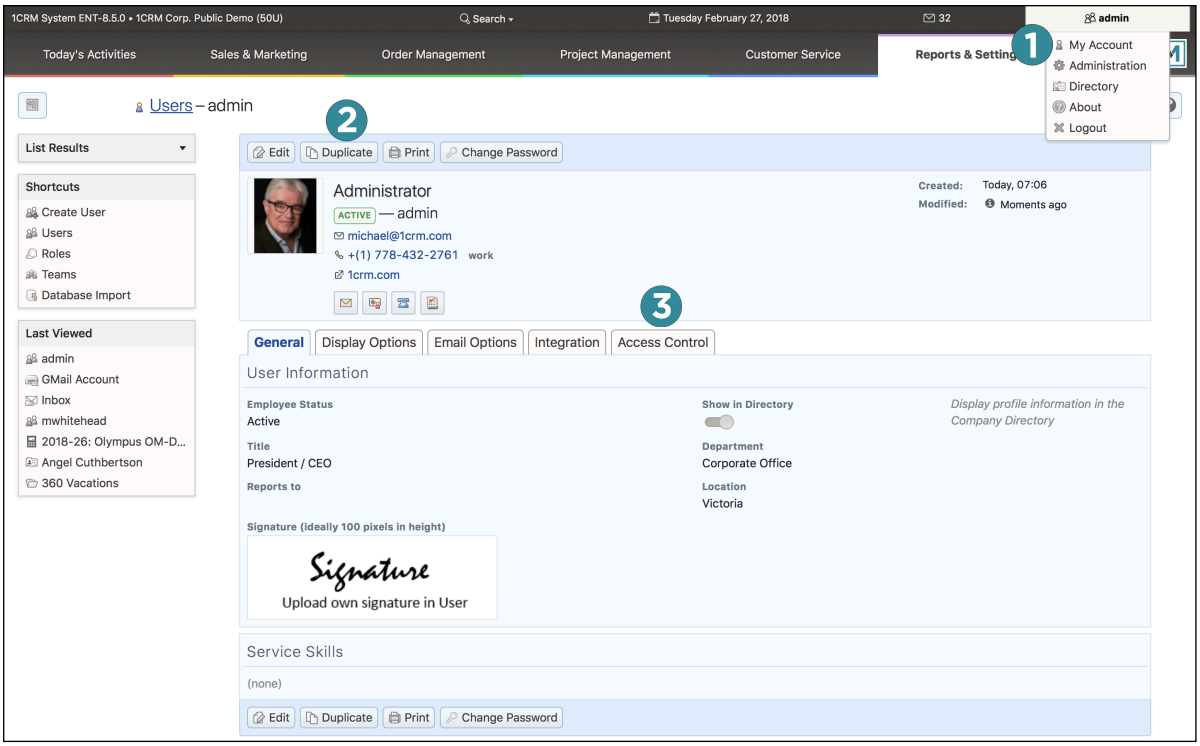


Figure 281: The 'My Account' Screen - General Tab

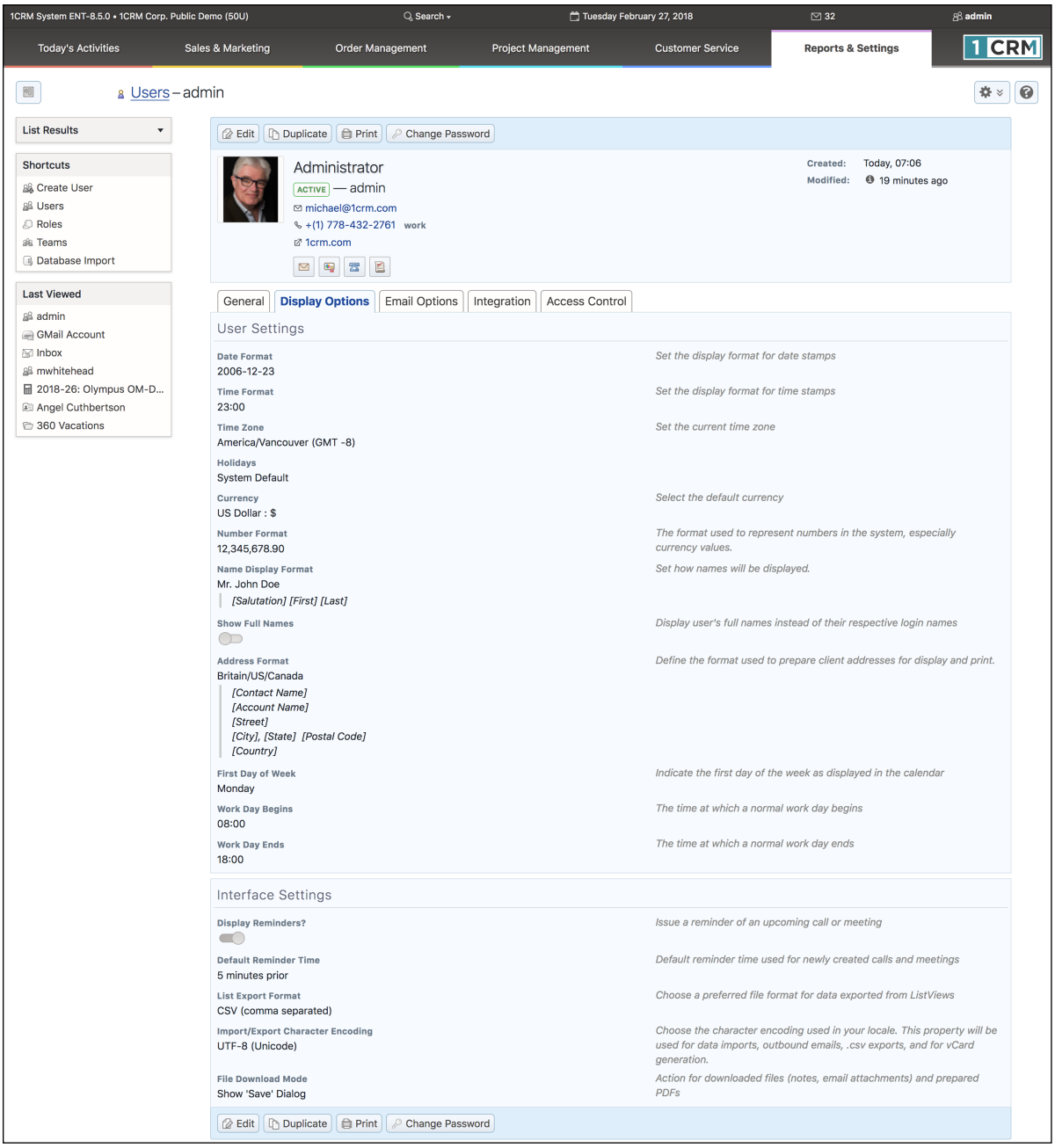


Figure 282: The 'My Account' Screen - Display Options Tab

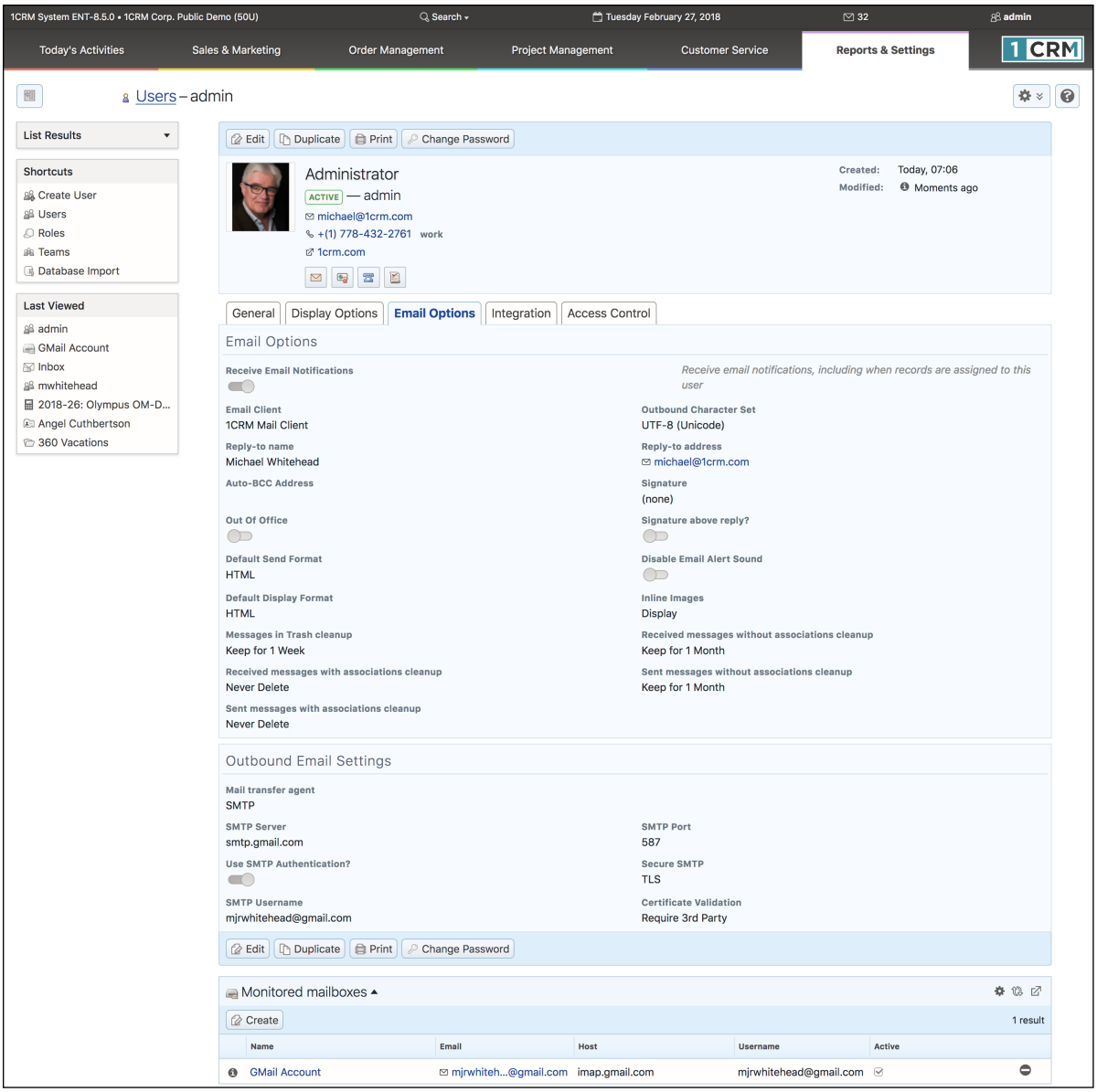


Figure 283: The 'My Account' Screen - Email Options Tab

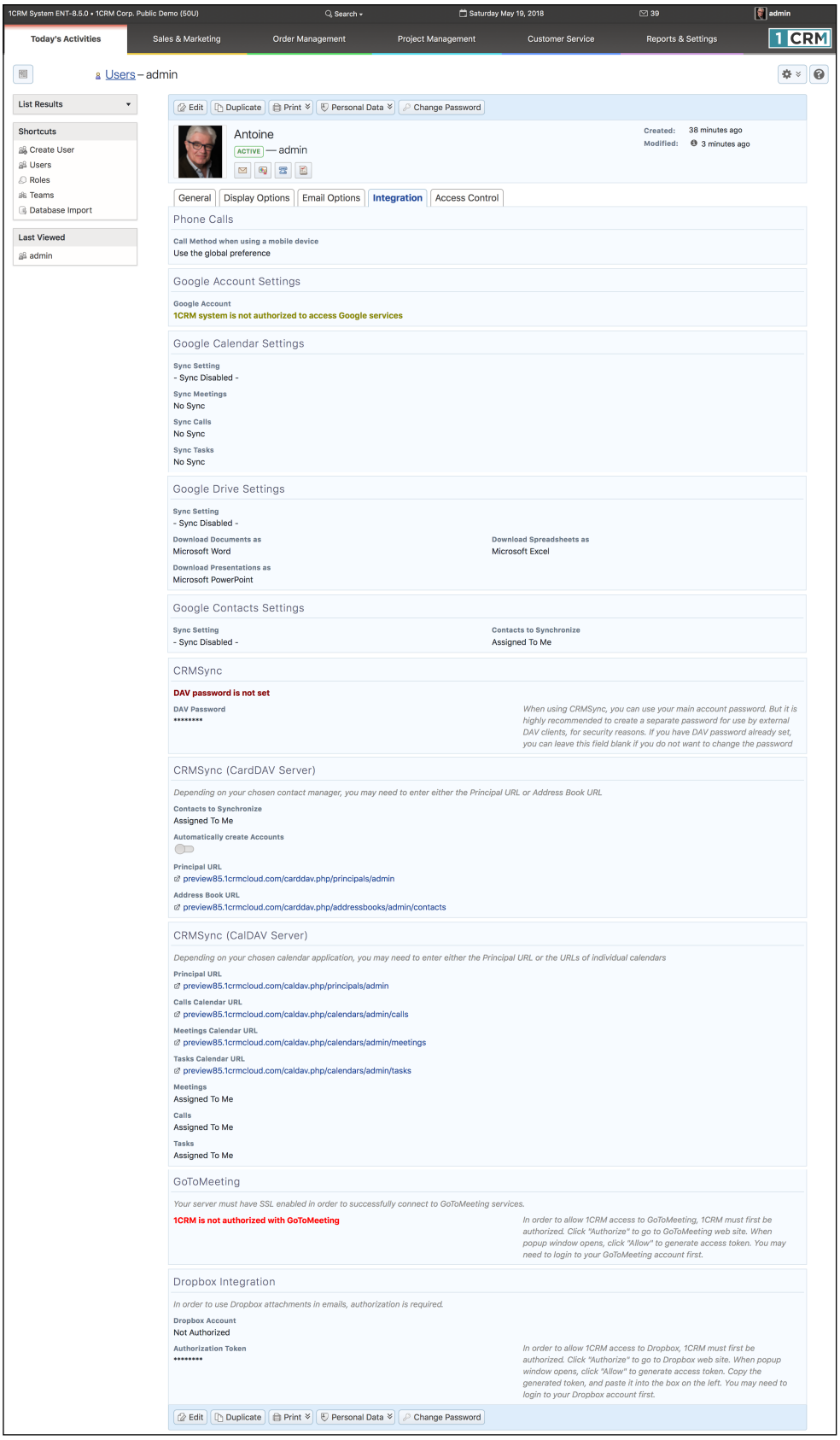


Figure 284: The 'My Account' Screen - Integration Tab

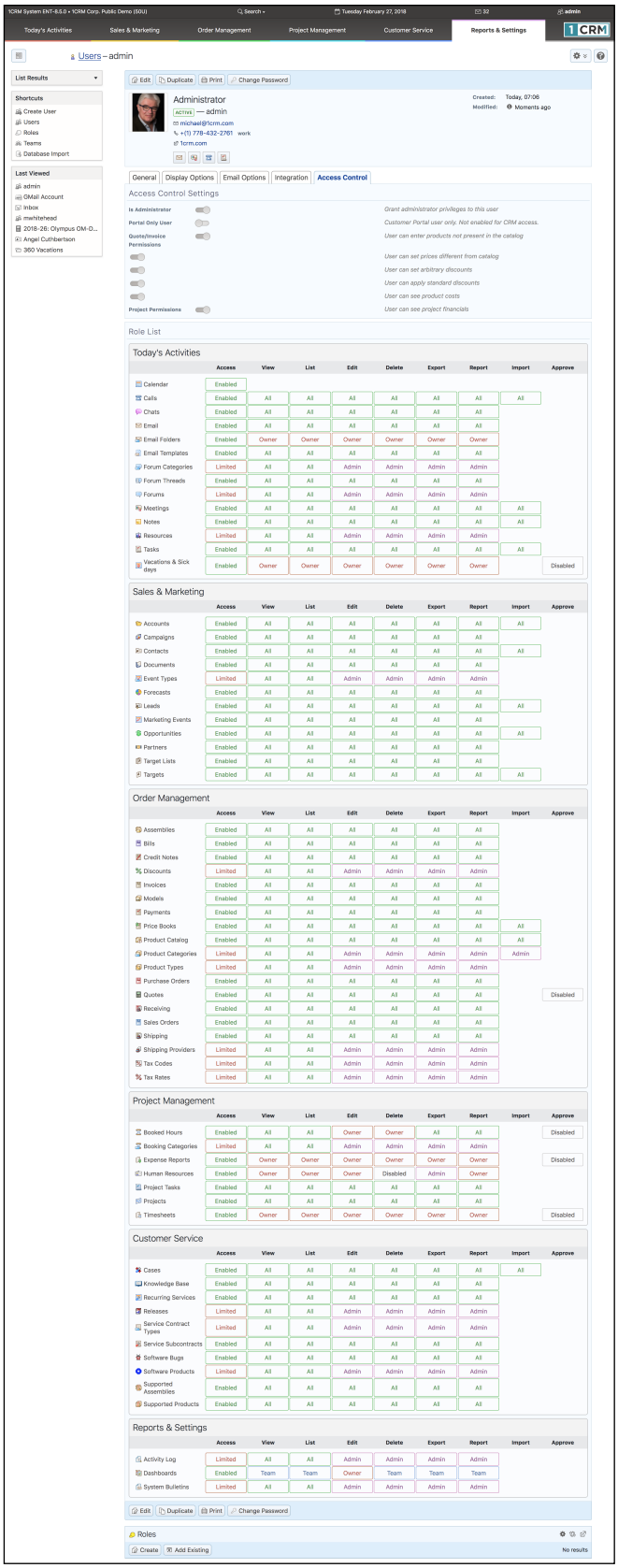


Figure 285: The 'My Account' Screen - Access Control Tab

10.2 Directory

To view the Company Directory, click the Directory link *(see highlighted item 1, on Figure 286 below)*. Note that the Admin link before it is only displayed for Users with Administrator capability. Figure 286 below shows the Directory Thumbnail View screen.

To see more information about a specific Employee, simply click on the image of the Employee within the Thumbnail View, to bring up their Business Card View. There are also shortcuts to choose Thumbnail or Business Card View for all selected Employees.

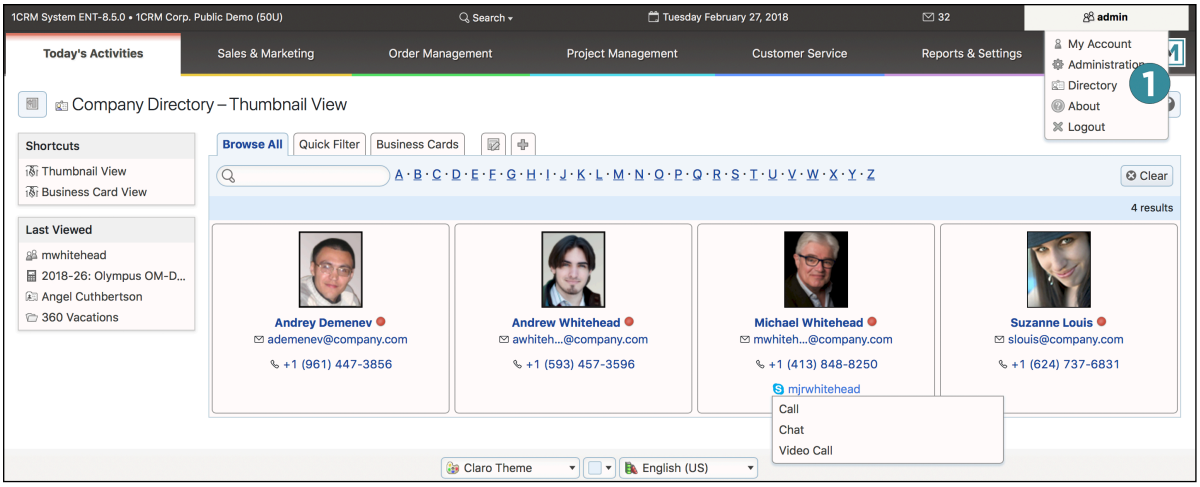


Figure 286: The Directory, Thumbnail View

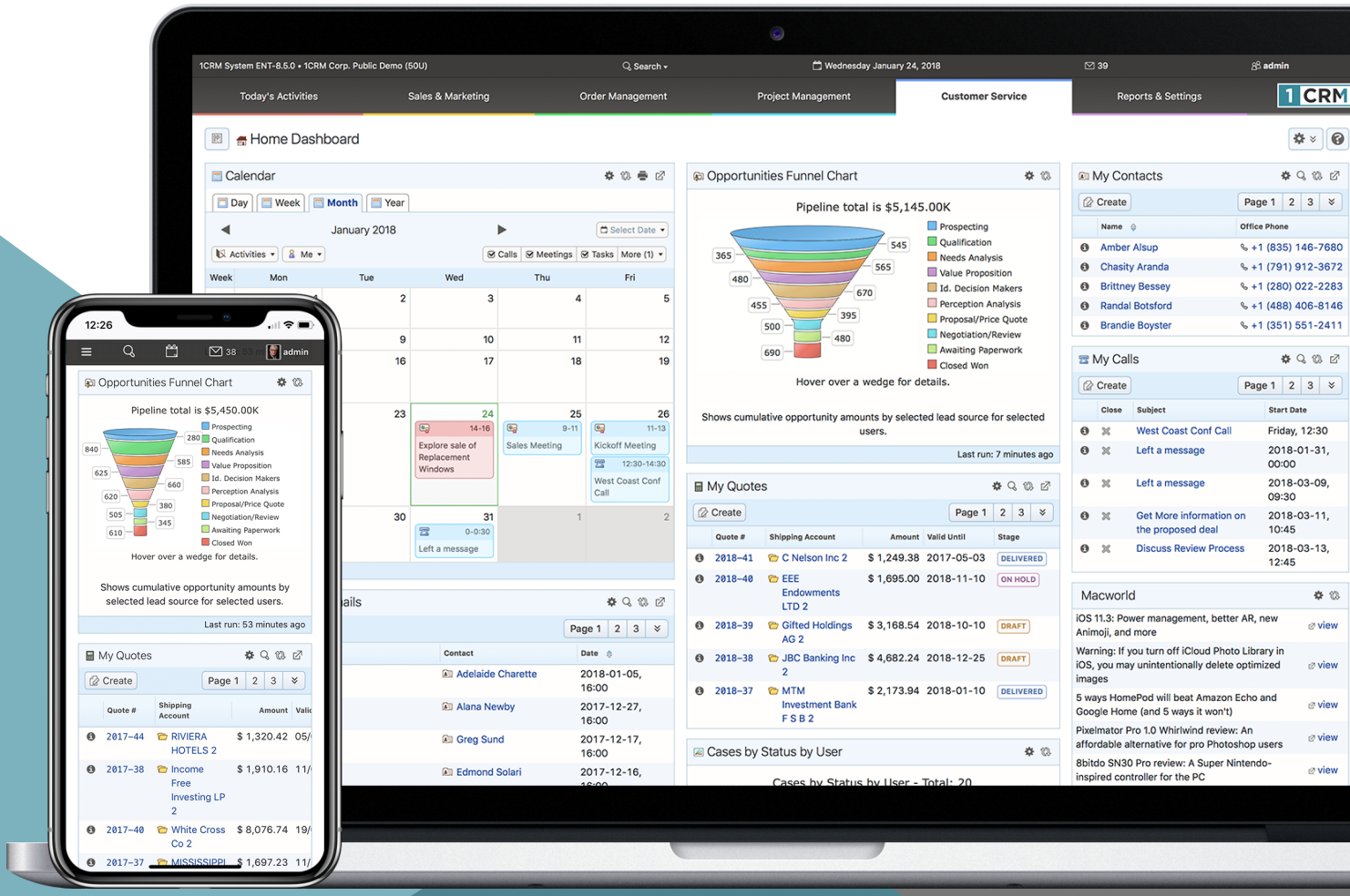
Like most of the modules within 1CRM, the Directory has a Help icon on the title bar at the top of the main screen body, followed by a choice of layout tabs, and a list of all or selected Employees. Note that the Directory only displays those Users with *Show in Directory* checked in their profile by the system Administrator. Those Employees with no photo in their profile will have a standard 'no photo' image displayed. Camera-shy Employees are encouraged to personalize this 'no photo' image for submission.

The Employees list may be filtered using the search controls, to see only those Employees in a given department, for example – or to find people by first or last name.

As well, the Directory Thumbnail View also has a red/green indicator light for each Employee, to show if they are online within the 1CRM system. Note that when Employees do not log out of the system (but simply close their browser), they may be incorrectly shown as online until their 1CRM session times out – usually about 10 minutes or so.

The Employee list is paginated if it contains more items than may be listed on the display and controls are provided to go to the start or end of the list, or step to the next or previous page.

Clicking on the email address for any Employee brings up your chosen email client to send a message to that Employee. Clicking on their phone number will bring up a dialog box to log an outgoing call, with a button to place the call via SkypeOut. Hovering on their Skype ID will offer the ability to contact the Employee via Skype Chat, Call or Video Call, as seen above.

1CRM USER GUIDE

Your Complete Guide to Using 1CRM