united planet

Intrexx Professional
Intrexx Compact

RELEASE 5

CRM Studio

Table of Contents

Writing Conventions

In this handbook, text passages will be displayed in *italics* when they refer to settings in the displayed dialogs. Menu items that are available in context menus can, in addition, always be selected from the main menu. Main menu items will not be described if they are not available in the context menu. A description of the general main menu items can be found in the *Portals* handbook. Programming code in the text will be displayed in the `Courier` font. Context menus can be opened by clicking with the right mouse button on the described element.

In the following, <*intrexx*> refers to your Intrexx installation path; under Windows, for example, this is usually *c:\intrexx*. On Linux, the normal install path is */opt/intrexx/*. The following symbols will be used for designation of special kinds of information:

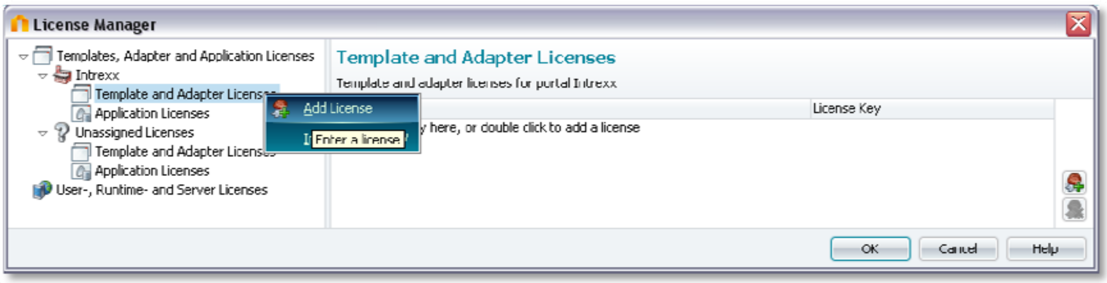
- Information
- References to an Intrexx handbook
- Directories
- URLs
- Click on buttons

Background Knowledge

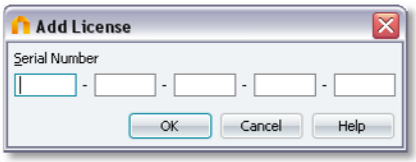
In order to understand this documentation, no special background knowledge is required. You can find helpful information in the *Portals* and *Applications* handbook.

1. Licensing

The *CRM Studio*, like every Intrexx application, will be created based on a template. You will find the *CRM Studio* template in the templates collection, which you can reach from the *Applications* module. In order to use the application you will need to purchase a license for it. Request the license from your software partner or from United Planet at the eMail address **info@unitedplanet.de**. The license key will be sent to you via eMail. In order to unlock the template, first open the Intrexx Portal Manager. Open the License Manager by clicking *Extras / License Manager*.



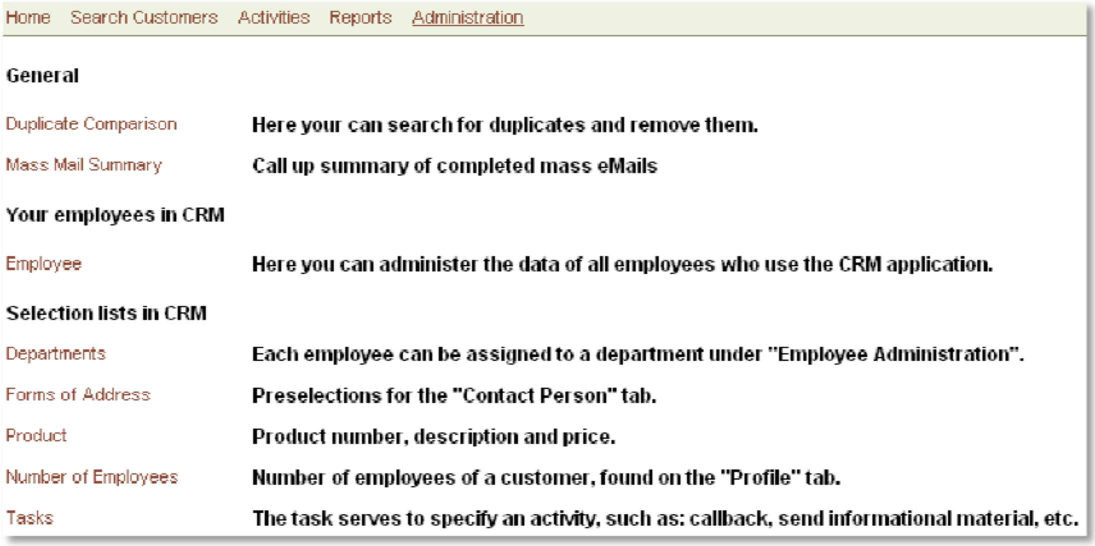
For the *Templates and Adapter Licenses* entry, select *Add License* from the context menu.



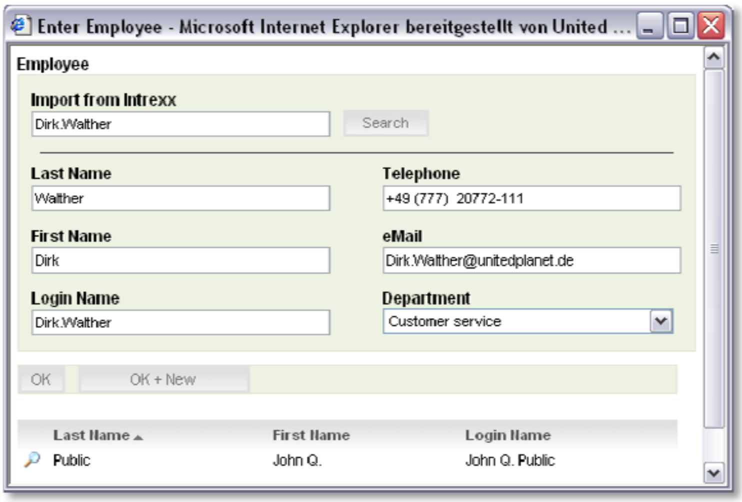
Enter your serial number here and then click *OK*. You can now create the CRM in the *Applications* module as a normal application using the *CRM Studio* template. You can find more information on this topic in the *Applications* handbook.

2. Administration

Open the *CRM* application in the browser and click on the *Administration* menu item.



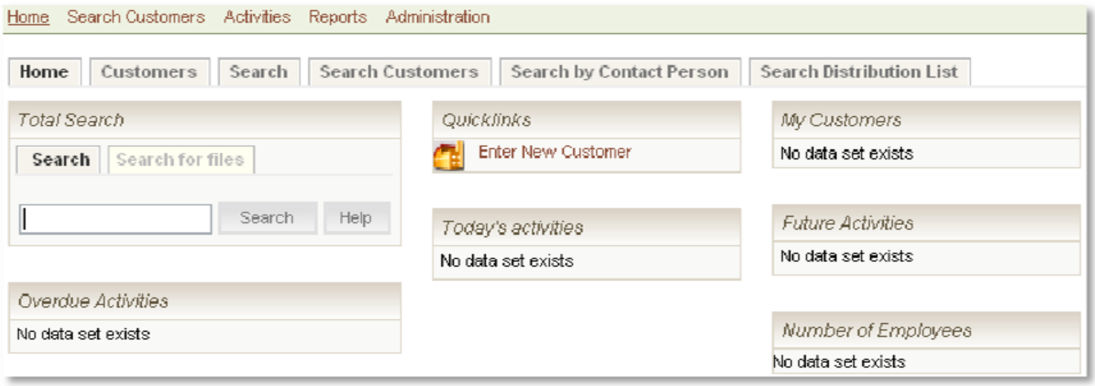
Here you will find the general settings for customer management. A short description describes the corresponding settings. If you click one of the links, a pop-up window will open, in which you can change the settings. Click on the *Employees* link.



Here, employees can be imported from the User Manager as persons responsible for customer management. If you click *Search*, all users that are stored in the user management will be listed. Select one of these users. His or her data will be automatically entered in the additional fields. Click *OK* to save the new customer manager.

3. Home Menu

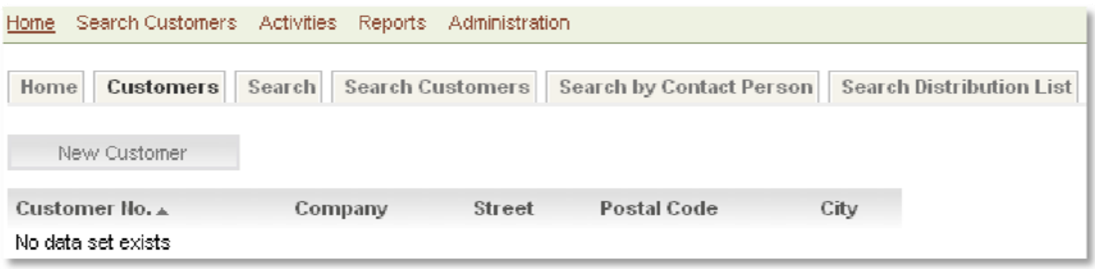
3.1. Home Tab



If you click the *Home* menu item, you will find yourself on the *Home* tab in the customer portal. The most important customer data will be shown in the portlets on this page. You have the ability here to execute a complete search of all customer data. A new customer can be entered by clicking the *Enter Customer* quicklink. You will also have overdue, current, and future activities in view. The portal page of customer management can be individually adjusted. Additional information on this topic can be found in the handbook *Portlets*.

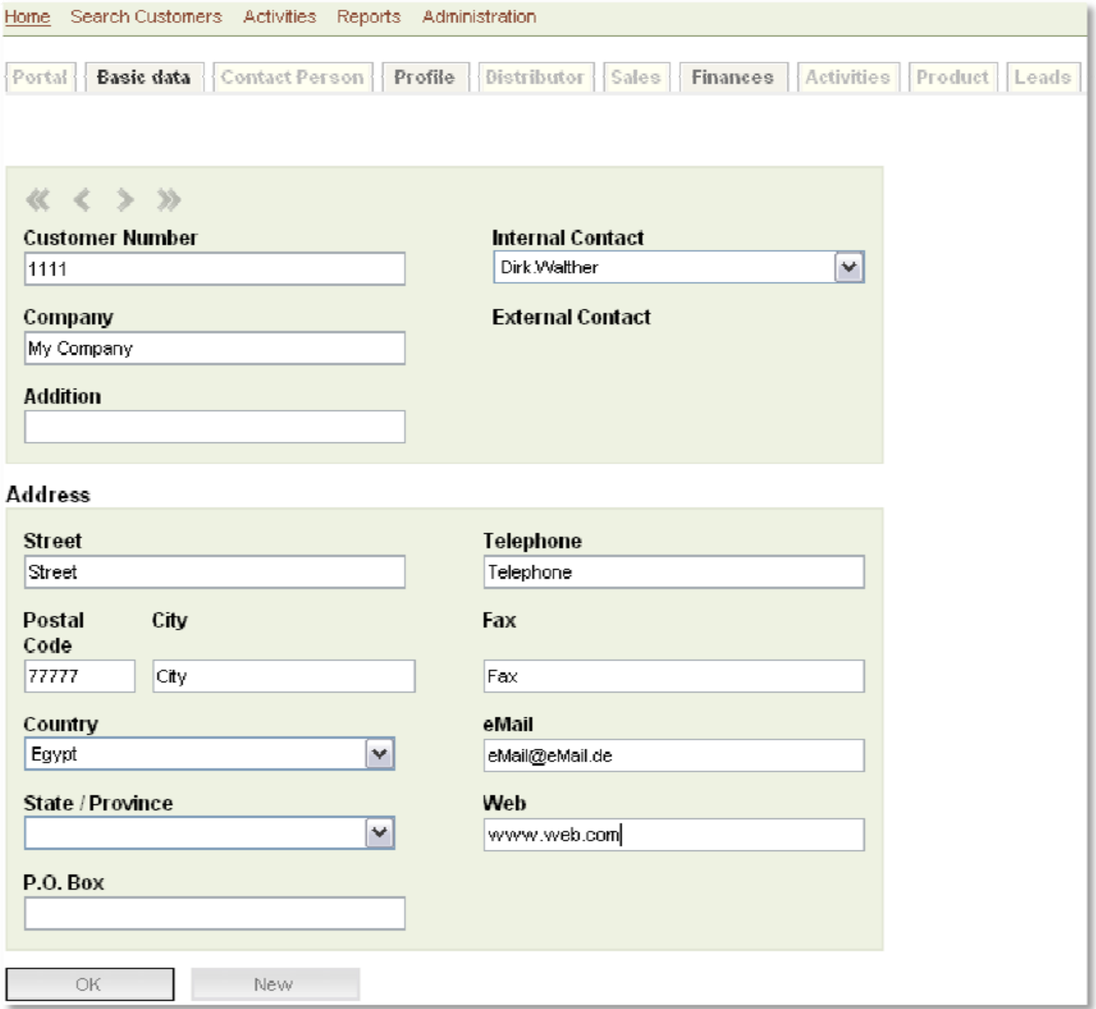
3.2. Customers Tab

Switch to the *Customers* tab.

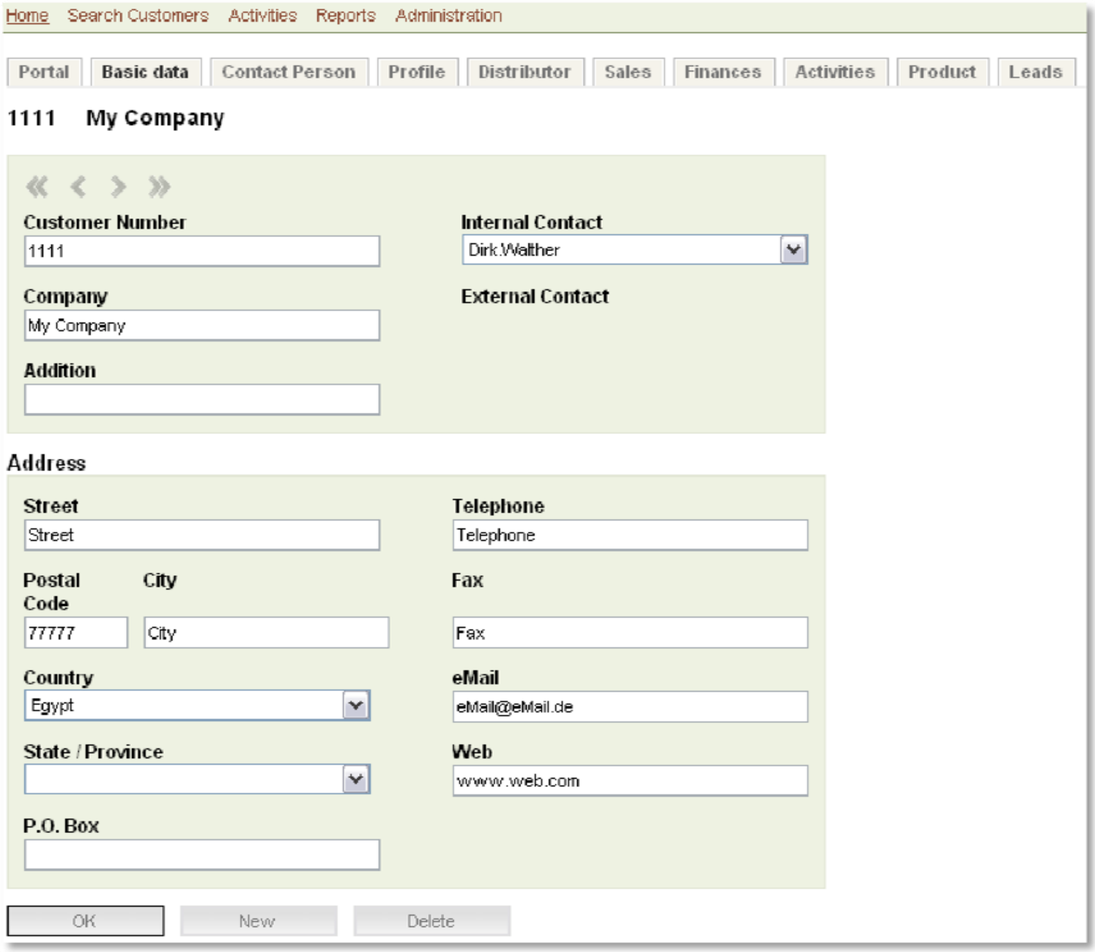


Here, all existing customers will be shown in a table with *Customer Number, Company, Street, Postal Code,* and *City*. Click on the tab for *New Customer* in order to enter a customer.

3.2.1. Basic Data



At the head of the page you will see multiple tabs. The tabs that you will enter data to when creating a new customer are active. All other tabs will first be available after saving the new data record. Enter the customer data here. You have the ability to select an *Internal Contact Person* here via a selection list. The selection list shows all employees that you have entered as users of the CRM application under the *Administration* menu from the *Employees* link. Save the new customer by clicking the *OK* button.

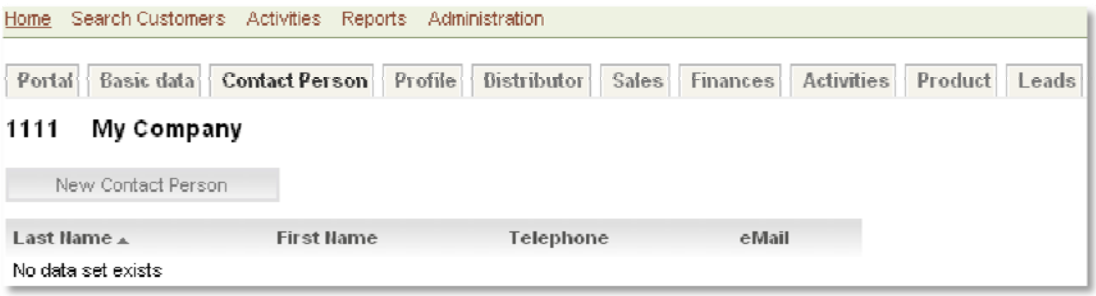


The new customer has now been saved. If multiple data records have been entered, you can page through them with the buttons at the head of the page.

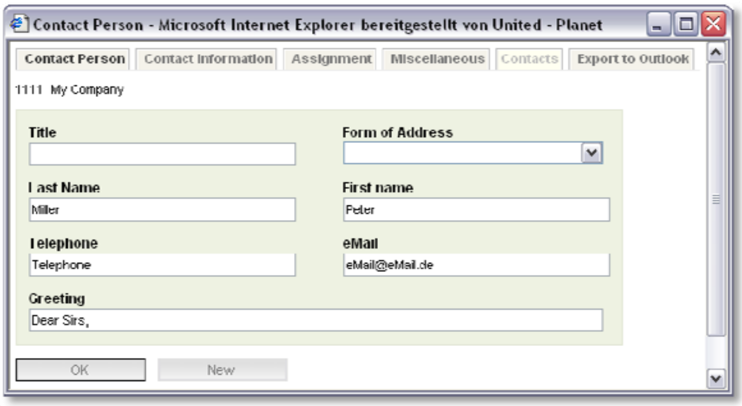
Customer data from external sources can be easily inserted into customer management with the *Data Transfer* tool (*Tools*). An additional possibility is the integration of foreign data into customer management (*Foreign Data Access*).

3.2.2. Contact Person

Switch to the *Contact Person* tab.

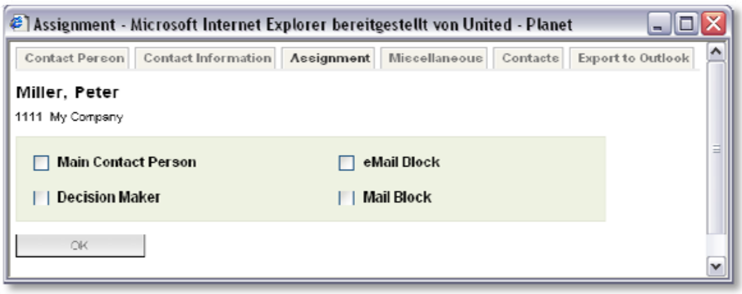


You can enter the contact persons for the customer here. To do this, click *New Contact Person*.

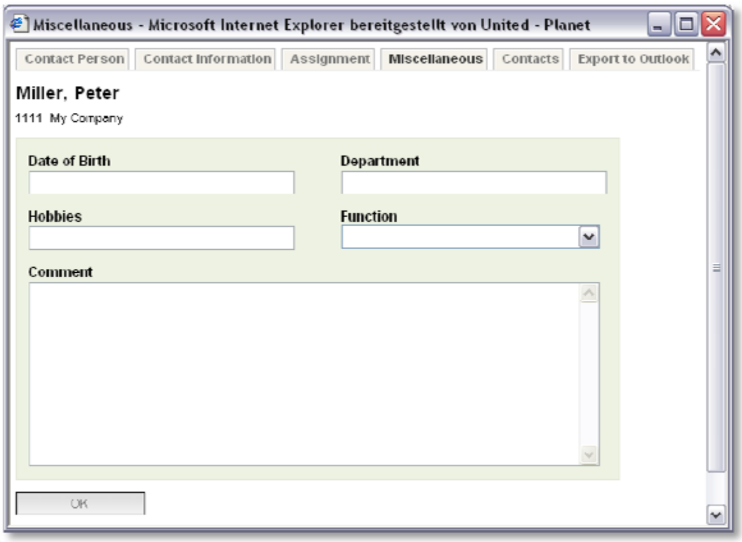


You can also find various tabs here. Enter the data for the contact person and click *OK*. The new contact person has now been saved. Switch to the *Contact Information* tab and enter his or her contact data.

When you are done, click *OK*. Switch to the *Assignment* tab.

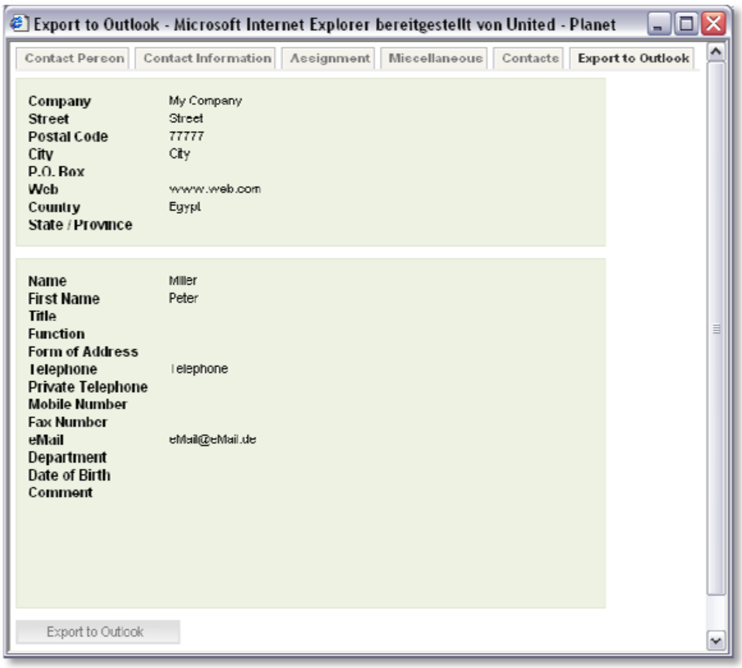


Here you can designate the contact person as *Main Contact Person* or *Decision Maker*. You have the ability to apply an *eMail Block* or a *Postal Block*. Click *OK* and switch to the *Miscellaneous* tab.

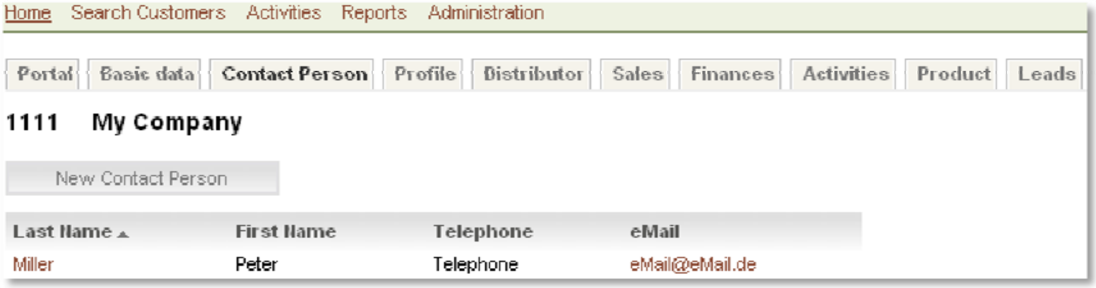


Additional data, such as *Date of Birth, Department, Function,* and *Hobbies* can be entered here. Click on *OK* and switch to the *Contacts* tab.

On this tab all activities, which you can document later in CRM upon telephone or personal contact with this contact person, will be shown in a table. The columns of the table can be changed via the link to *Adjust Table.* Switch to the *Export Outlook* tab.

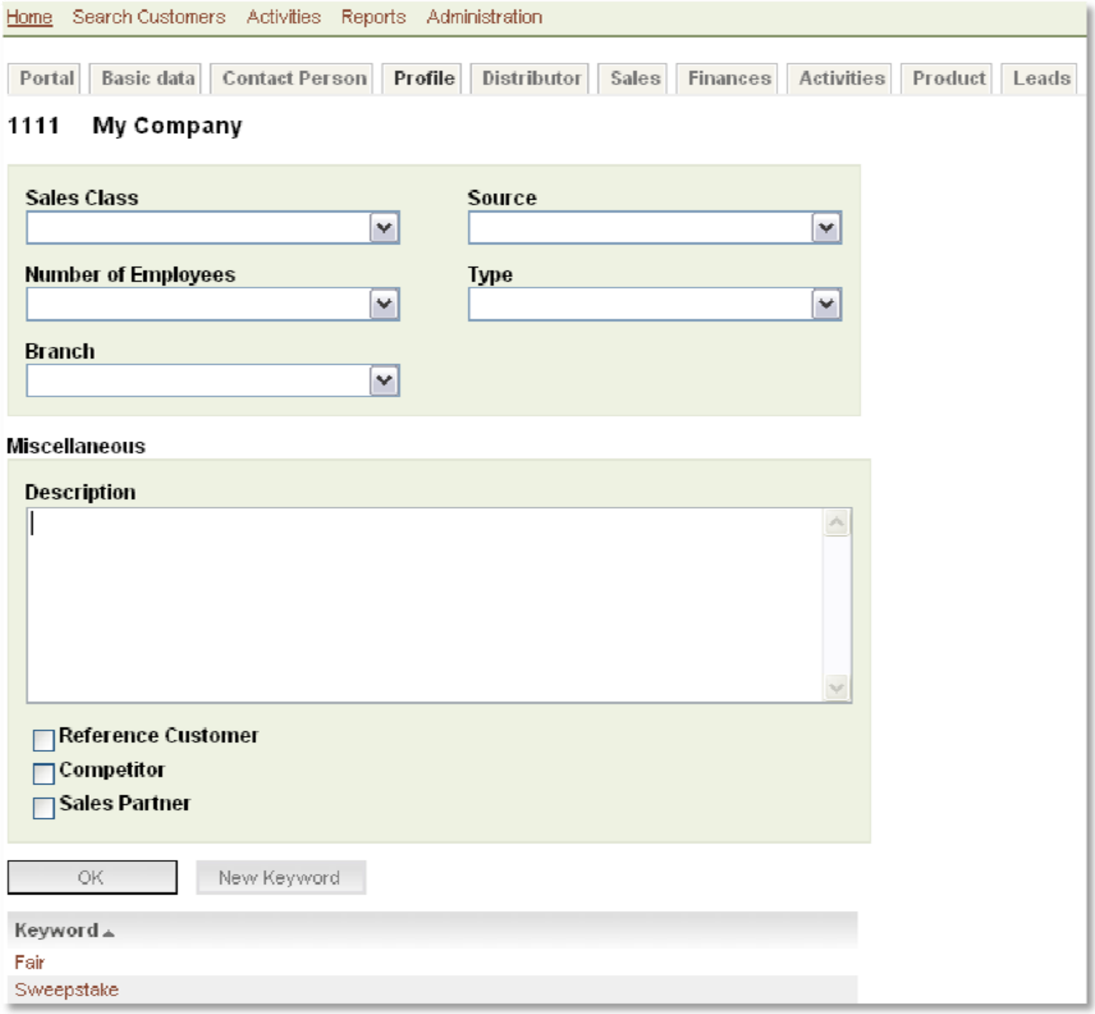


You will see an overview of all entered contact person data here. By clicking *Export to Outlook*, a VCF file will be created, which you can import into *Outlook* as a new contact. Close the window. The new contact person will now be shown on the *Contact Person* tab in a table.



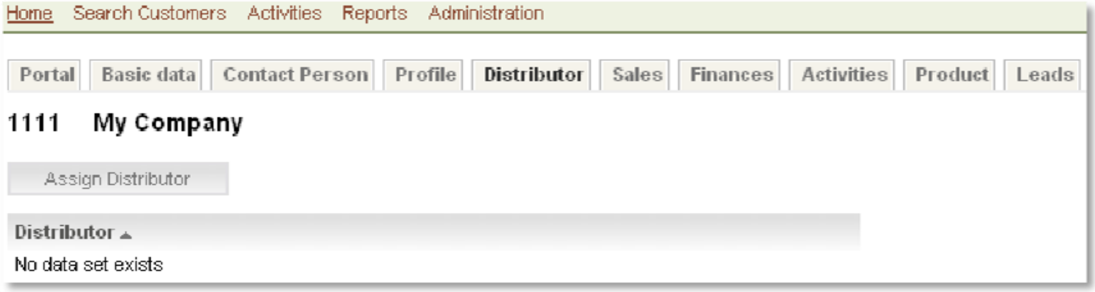
3.2.3. Profile

Switch to the *Profile* tab.

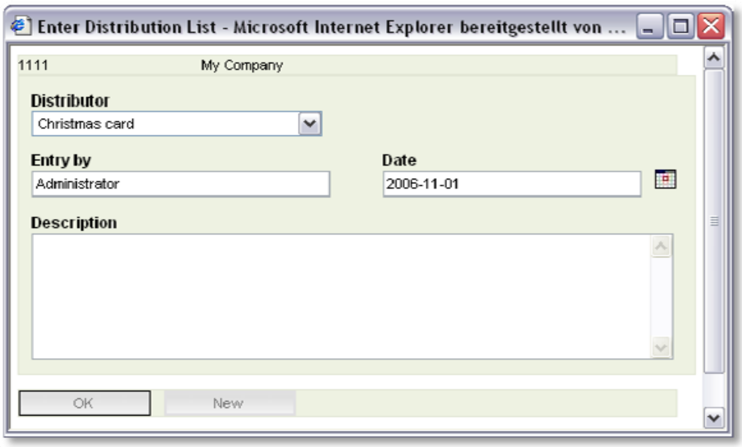


Here, all business-relevant characteristics, such as *Sales Class,* the *Origin* of the address, the *Number of Employees* of the customer business, the *Type*, and the *Sector* can be entered. The customer can be designated as *Reference Customer*, *Competitor*, or *Sales Partner*. With *New Keyword,* keywords can be entered, which you can then search for in the customer search window. If a customer is designated as a *Sales Partner,* it can later be selected as an external supervisor. Save the entries by clicking *OK*.

3.2.4. Distribution



A distribution list can be assigned here. Click *Assign distribution list*.

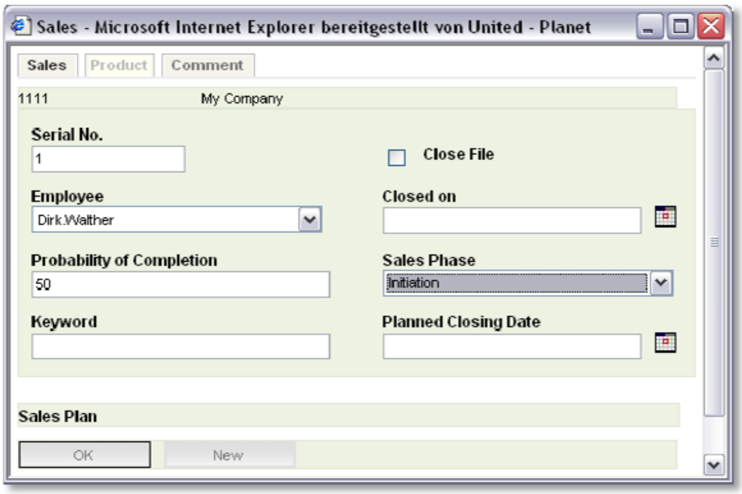


With the customer search, you can later retrieve all customers that have been assigned to the distribution list (such as for a Christmas card). Distribution lists will be entered from the *Administration* menu.

3.2.5. Sales

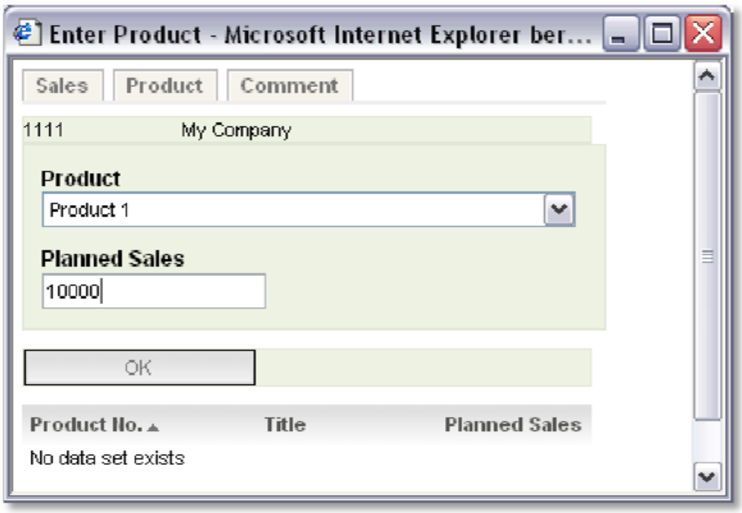
Switch to the *Sales* tab.

A sales-oriented completion prognosis can be entered here. Click *New Entry.*



Enter the *Sales probability* here in percent, the *Sales and distribution phase,* the *Intended completion date,* and a *Keyword,* the last of which can be used later in a search. When you are done, click *OK.*

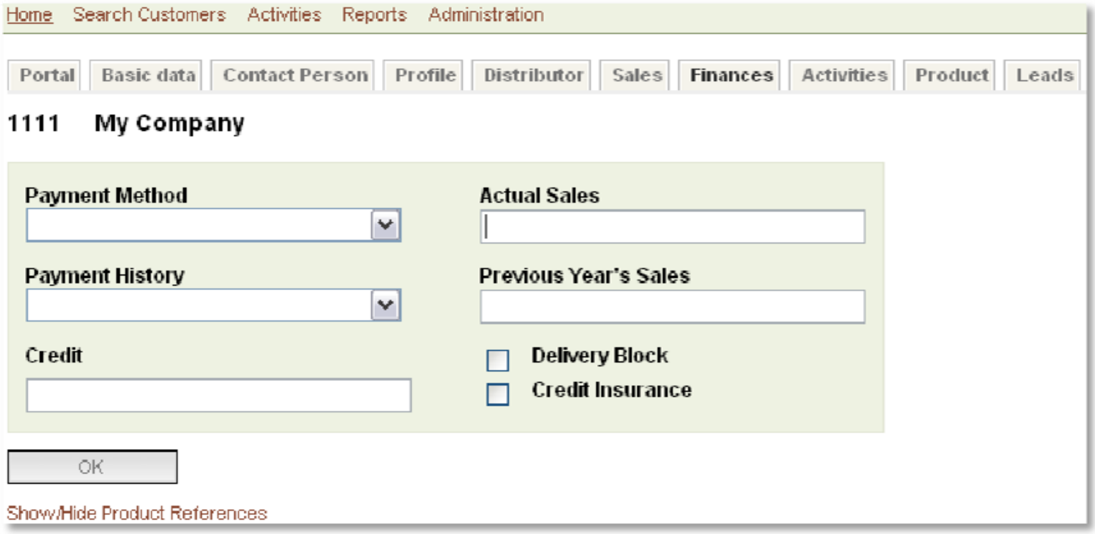
You can now enter products on the *Products* tab via *New Product*.



Click *OK* and close the window. The planned turnover will be calculated into the general planned turnover (*Reports* menu). With the sales reports, you will have an overview of running processes and can calculate correspondingly.

3.2.6. Finances

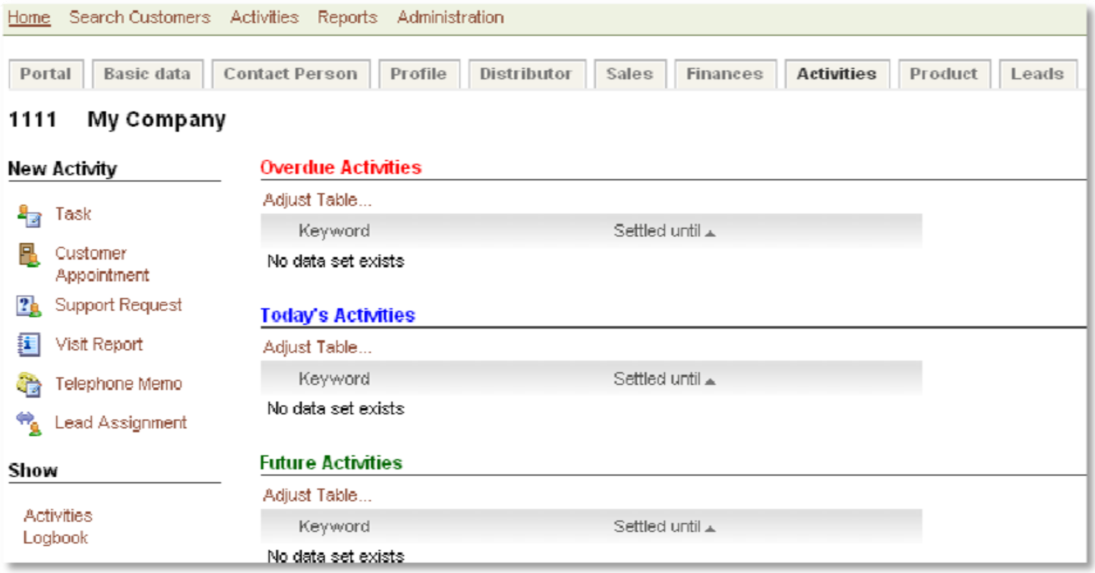
Switch to the *Finances* tab.



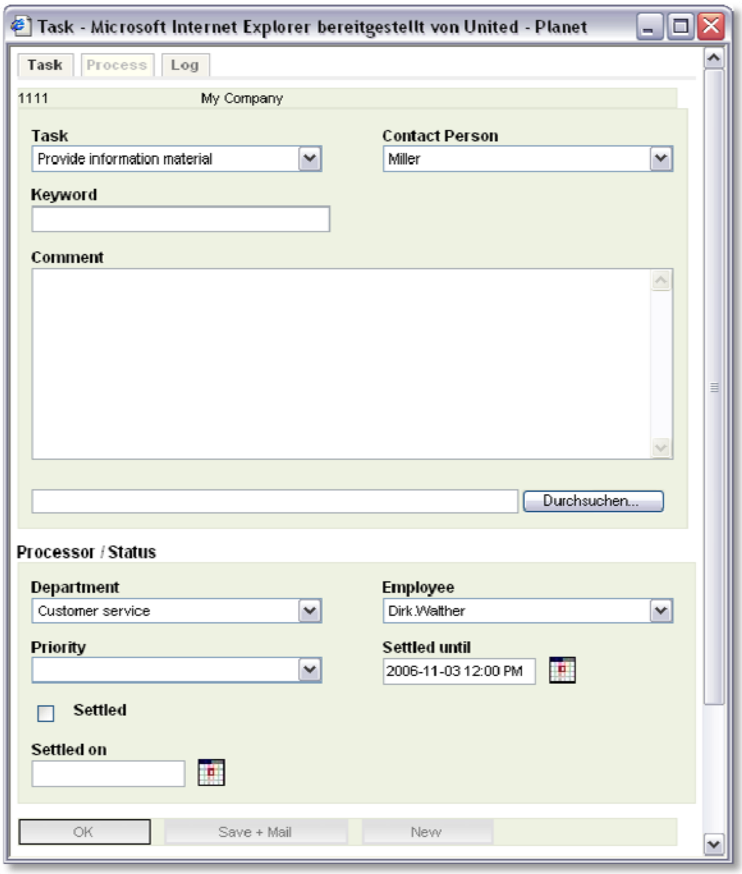
Here you will enter the *Payment behavior, Payment type, Turnover volume,* and the *Line of credit* for the customer. With the link to *Show/Hide open product payments*, open deliveries can be shown.

3.2.7. Activities

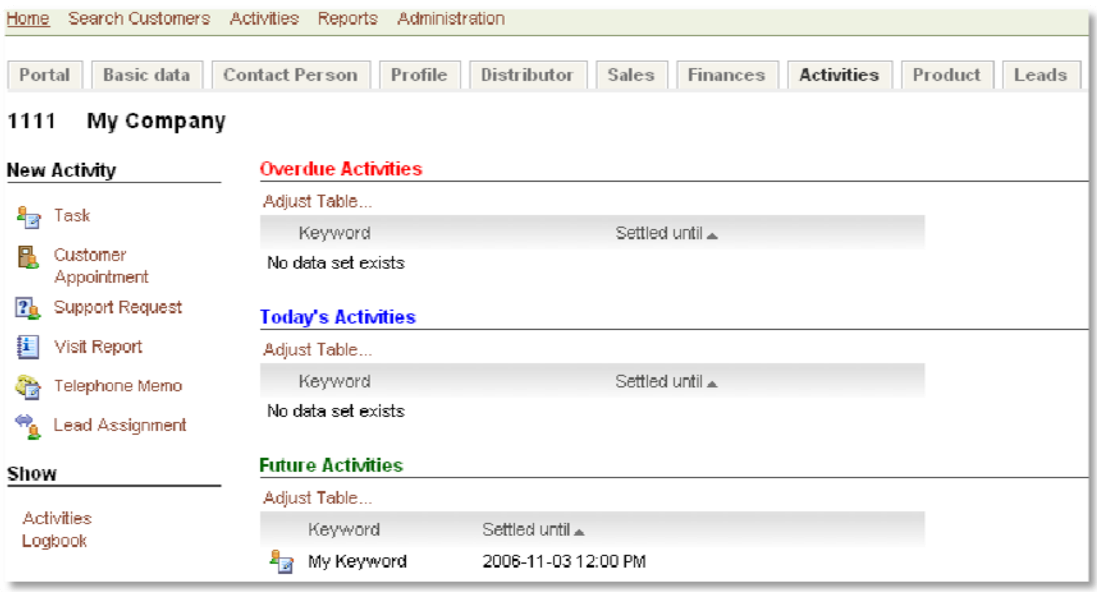
Switch to the *Activities* tab.



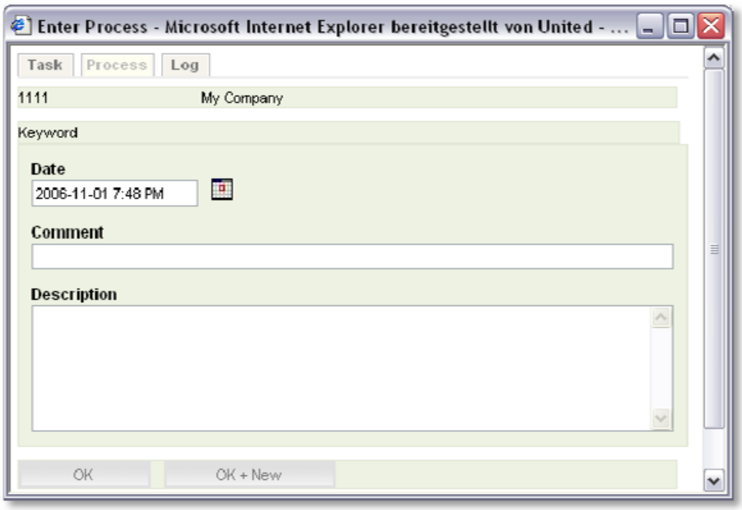
Here you will have an overview of *Overdue, Current,* and *Future* activities. The columns of the corresponding tables can be changed via the link to *Adjust table*. You can enter new activities as a *Task, Customer appointment, Support request, Visit report, Telephone note,* or *Lead assignment*. To do this, click on the corresponding link.



Here you will see the new activity, which has been entered as a *Task*. Enter the type of the *Task*, the *Contact person*, a keyword, and the comments that will describe the task. With the *Browse* button, a file of your choice can be attached. Enter the *Department* and the *Employee* who is responsible for the completion of the task. You can set a *Priority* as well. In *Settled until*, enter the date on which the task should have been completed. With a completed task, mark the *Completed* setting by clicking the checkbox. In *Settled on*, you will enter the date on which the task was completed. With the button *Export + Mail*, an eMail with the task data can be sent to the employee responsible for it. The activity will be saved at the same time.

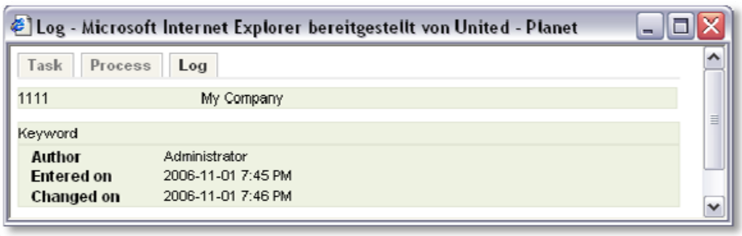


An incomplete task will, depending on its due date, be shown in one of the tables on the *Activities* tab. It can be opened there for additional processing. Open the task and click on the *Development* tab.

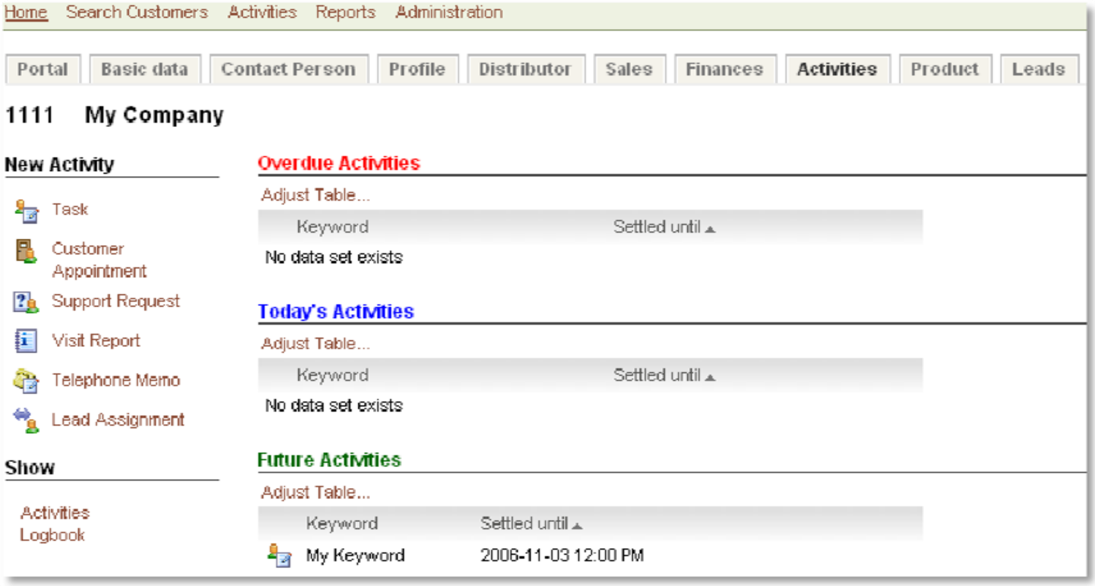


Here you have the ability to enter multiple comments for the progress of the activity. Click *OK* here.

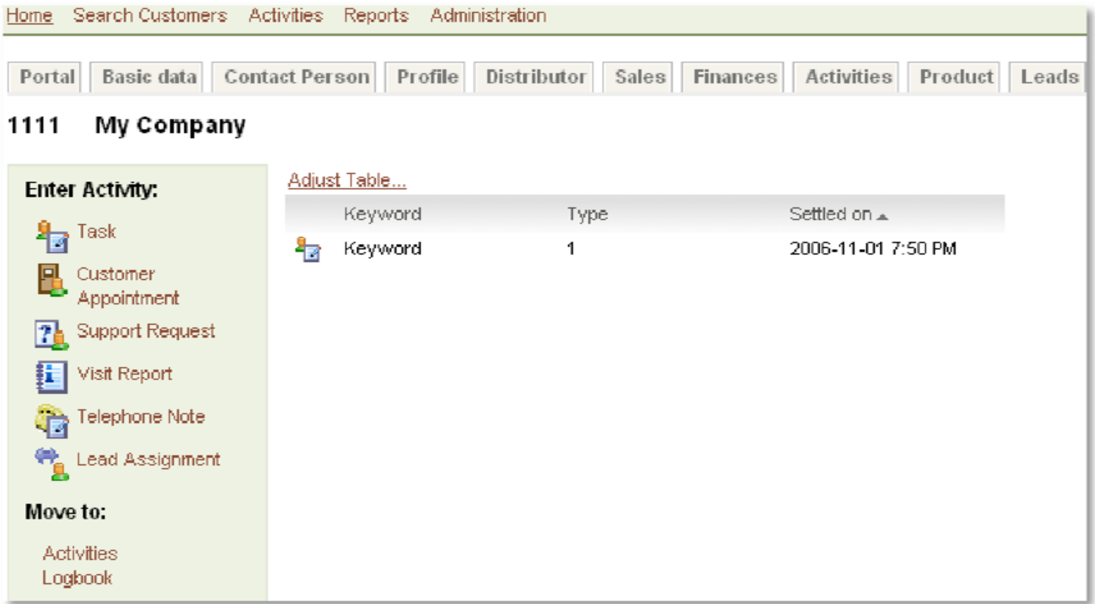
Next, switch to the *Log* tab.



You will be informed of the author, the creation date, and the time at which the activity was last changed here. Close the window.

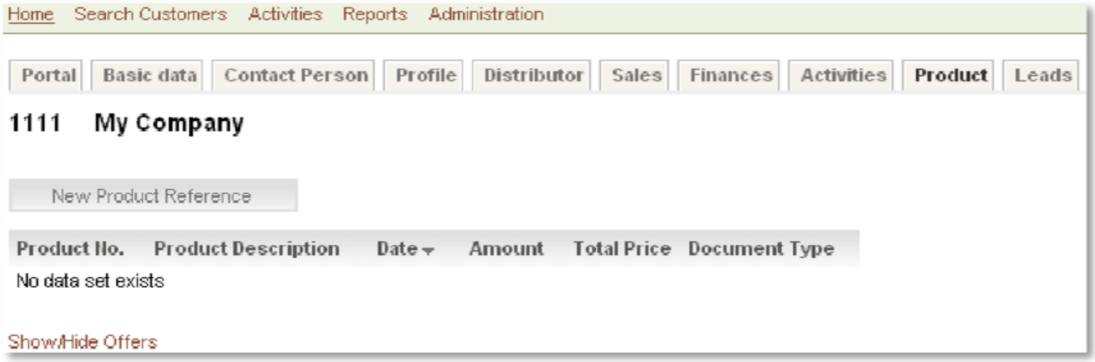


In the *Show* area, you can switch the display between that of incomplete activities and that of the *Logbook*, which shows completed activities.

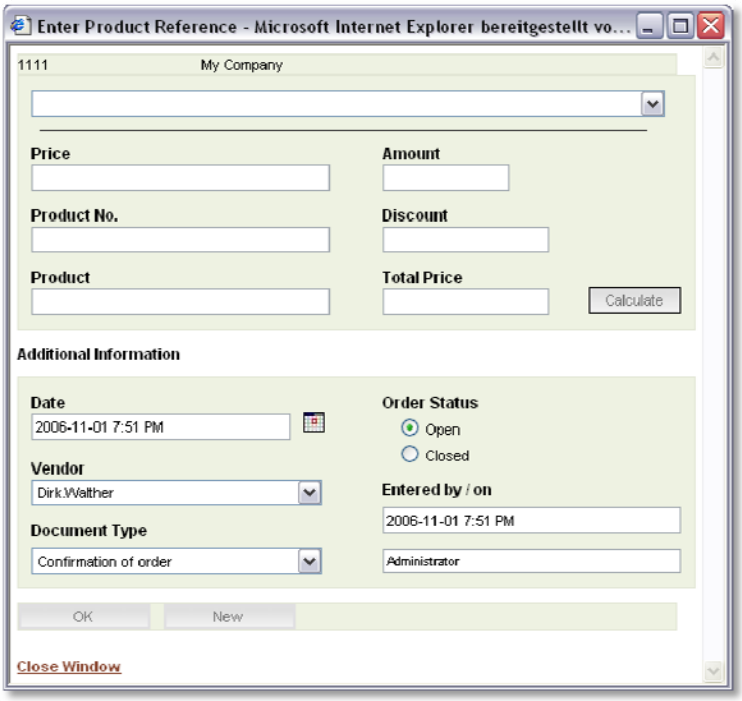


3.2.8. Products

Switch to the *Products* tab.



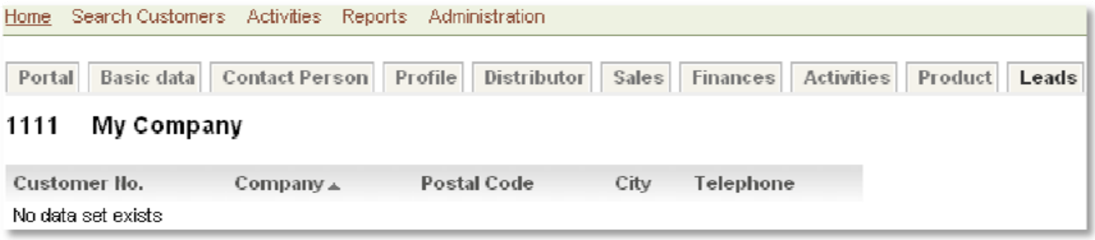
In the table, all product references will be listed. The link to *Show/Hide special offers* allows an overview of running sales to be displayed. Click *New product reference* here to create a new reference.



From the selection list at the top, you can select a product that you have entered from the *Administration* menu. The fields in the upper area will be automatically filled out. Click the *Calculate* button to refresh the total price. Select the *Receipt type*. The order status can additionally be designated as *Open* or *Completed*. Click *OK* to save the new product reference.

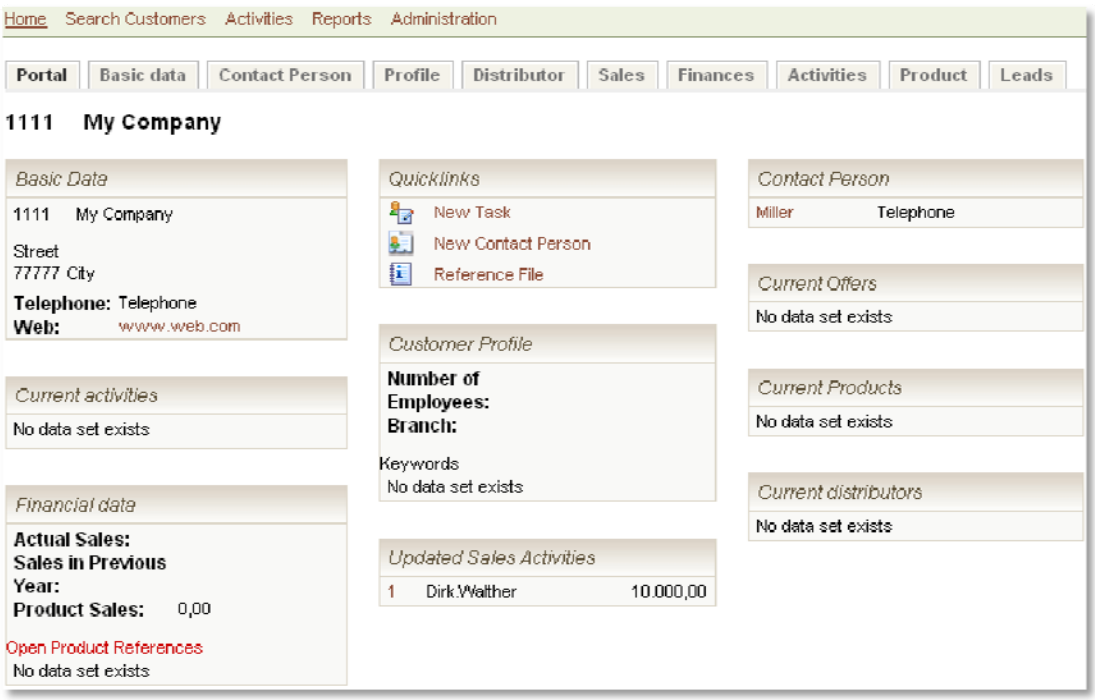
3.2.9. Leads

Click on the *Leads* tab.



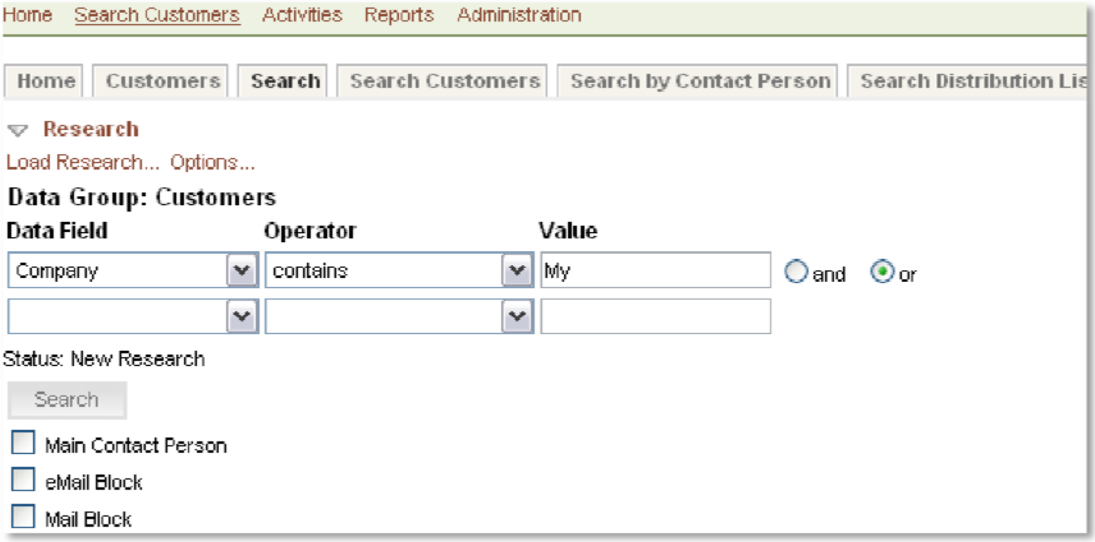
All activities that have been entered under *Lead assignment* will be listed here in a table. With a lead placing activity, all customers that have been designated as sales partners on the *Profile* tab will be listed in a selection list. The sales partner that you have selected will be displayed here. On this tab you will have an overview of all external customer representatives.

3.2.10. Portal



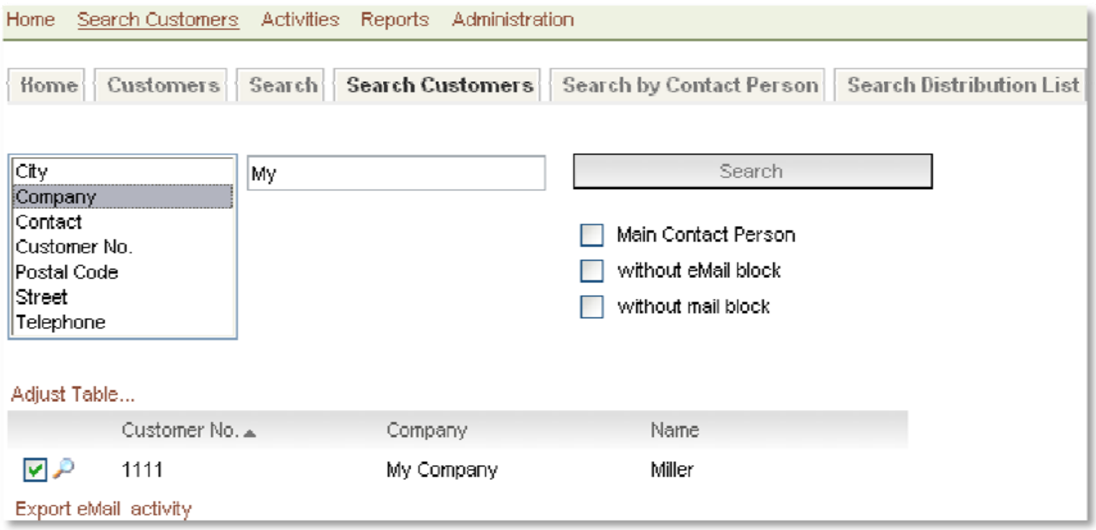
On the *Portal* tab, the most important data for the selected customer will be shown in portlets. This page can also, as with all portal pages in Intrexx, be adjusted. Information on this topic can be found in the *Portlets* handbook.

4. Research



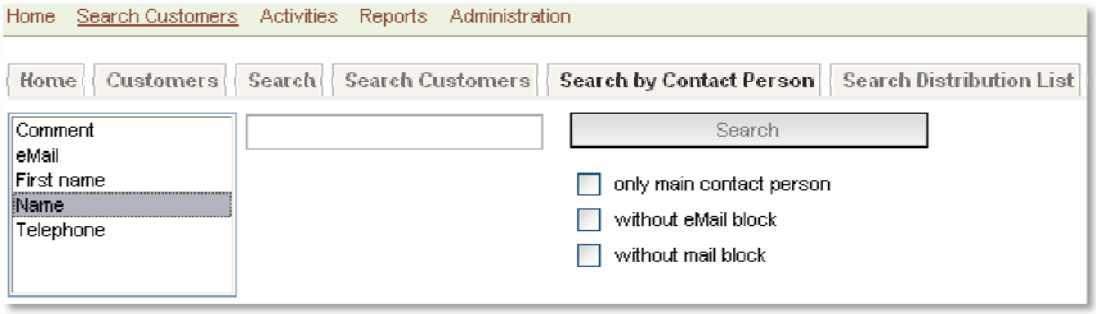
With the Research function, you can execute complex queries about customers, contact persons, and activities. The results of the search will be shown in a table. First, select a data field. In the middle selection list, select the operator. Enter the value to be found in the *Value* edit field. The Research *Company contains my*, for example, will return all customers whose company name contains the term *my*. If, additionally, only the customers should be shown whose customer number begins with a 1, you will enter into the second line the data field *Customer number*, the operator *begins with*, and the value 1. If you wish to link both Research criteria, as in this example, you must select the option *and*. With the checkboxes *Main contact person*, *eMail block*, and *Postal block*, the results can be additionally restricted. Additional information on this topic can be found in the handbook *Applications*, chapter *Research*, and chapter *Filter*.

5. Customer Search



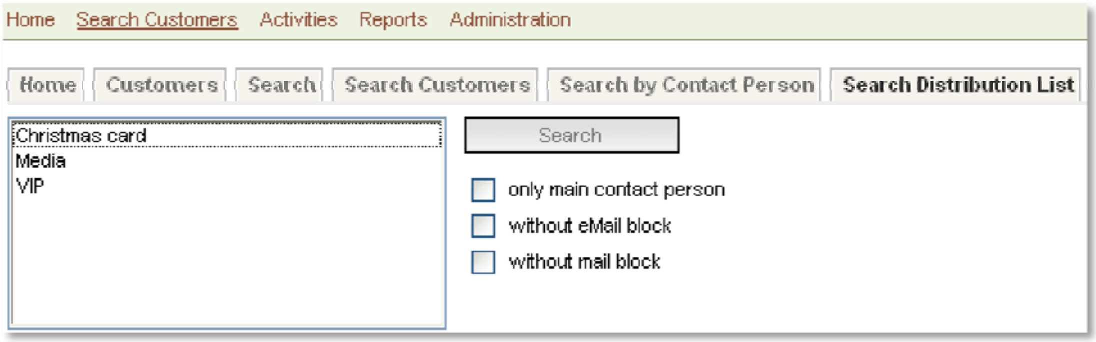
You can reach the customer search from the *Customer Search* menu item, or from the *Customer Search* tab in the *Home* menu. In the customer search, you can search for a specific customer. Select a field, such as the customer number, from the selection list and enter the customer number in the edit field to the right. After clicking *Search*, the search result will be shown in the table below. With the checkboxes *Only main contact person*, *Without eMail lock-out*, and *Without postal lock-out*, you can additionally restrict results. The link to *Adjust table* allows you to define which fields will be shown in the results table. By clicking on the magnifying glass icon in the table, the customer will be opened for editing.

6. Search For Contact Person



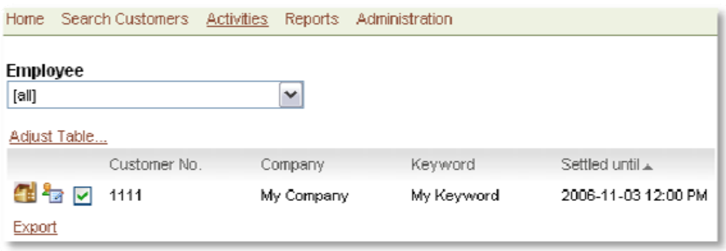
You can search for a specific contact person here. All fields in the *Contact Person* data group are available.

7. Search For Distribution List



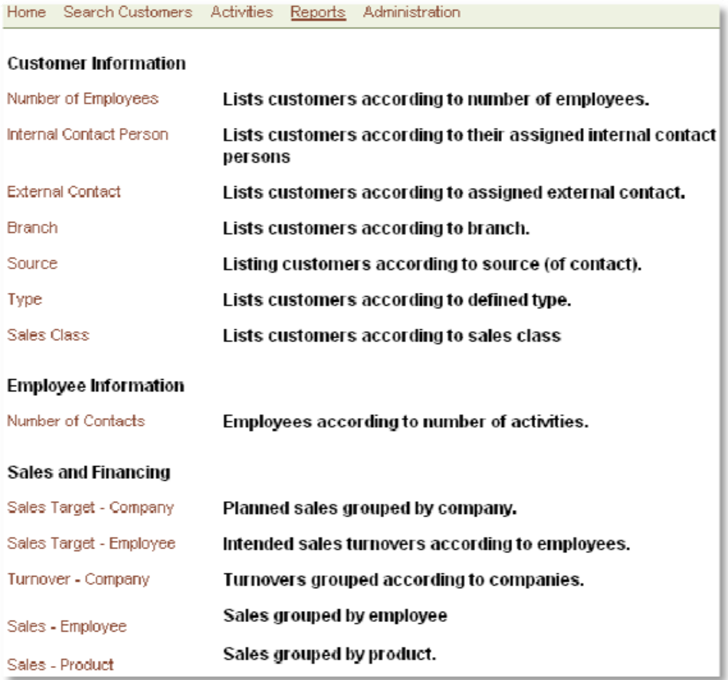
Distribution lists will be entered under the *Administration* menu. Contact persons can be assigned to these distribution lists. With this search function, you will be shown all contact persons that have been assigned to a specific distribution list.

8. Activities Menu



In the *Activities* application menu, you can select users of Customer Management from the *Employees* selection list. All activities for which the user is responsible will be listed in the table. Clicking on the icon will switch to the *Portal* menu, on which the data of the customer will be listed in portlets. From here, the data can be additionally edited. Clicking on the icon will open the activity for editing.

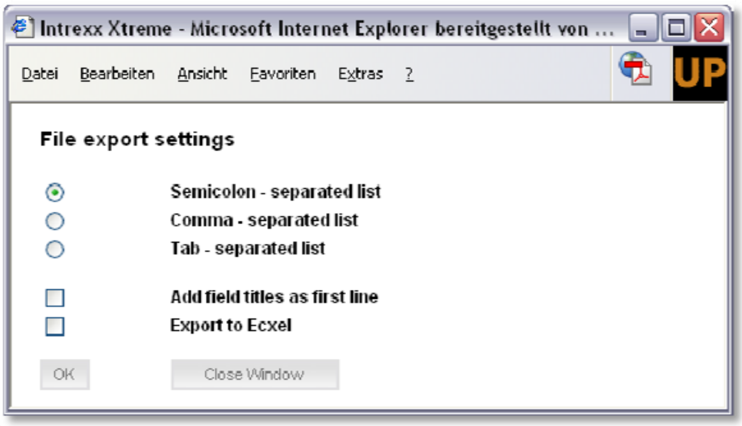
9. Reports Menu



Here you will find a collection of ready-made analyses, with which you can output reports about your customer portfolio. Click on one of the links to start the analysis.

10. Data Export

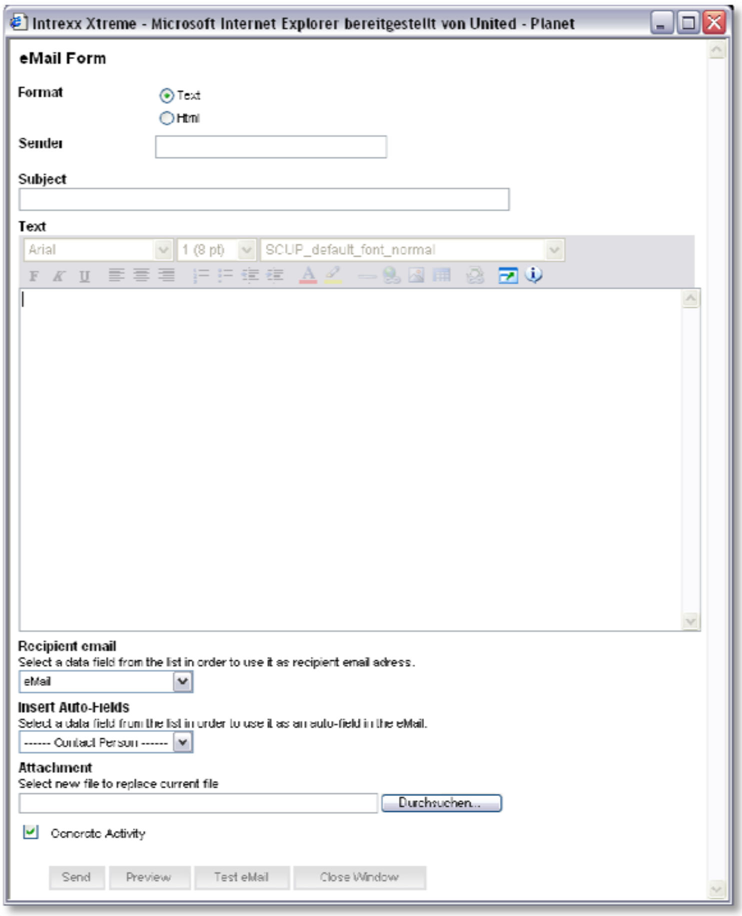
Under each table that shows the results of a search or Research, you will find the link to *Export*. Clicking on this link will open an additional window, in which you can define whether you want to export the data in the table as a text or as an Excel file.



Enter the desired separator character (semicolon, comma, or tab). With the setting *Include field names as first line*, the column titles for the table will be included in the export. Click *OK* and save the export file in a directory of your choice. You can use the file, for instance, as a control file for serial mails in other programs.

11. Serial eMails

Below each table that shows the results of a search or Research, you will find the link to *eMail*. With this link, an additional window will be opened, in which you can compose an eMail and send it to all data sets in the search result.

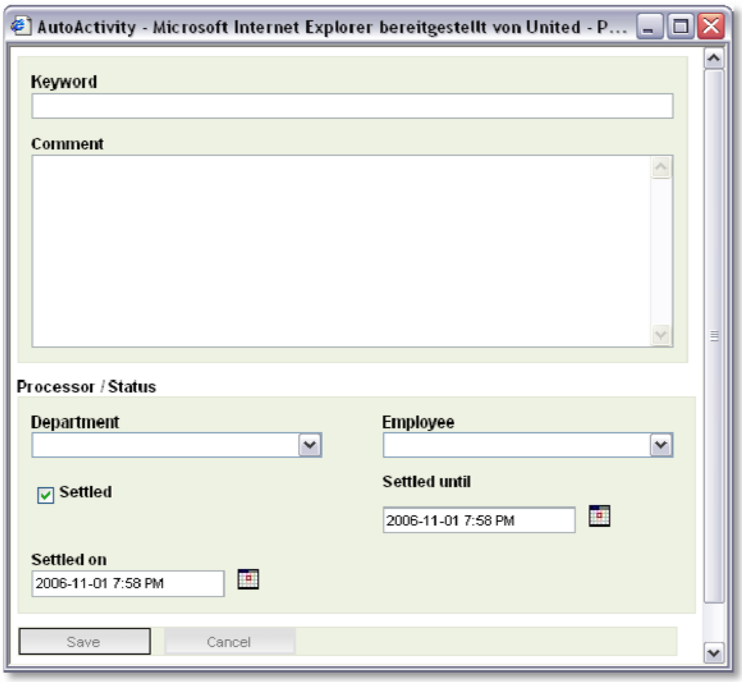


You can send the eMail in *Text* or *HTML Format*. Enter the *Author* and a *Subject*. The text of the eMail can be entered in the *Text* field. With the function to *Insert Auto-Fields*, a data field from the *Contact Person* data group will be inserted into the text of the eMail. Select the desired field from the selection list. As a placeholder, the field name and a number combination in brackets will be inserted into the text field of the eMail. This value will be replaced with the corresponding value of the field upon sending the eMail. You can include a file as the *Attachment* to the eMail, which will be sent as well. With the setting to *Generate activity*, a logbook entry will be created and saved for each customer reached via eMail. With the *Test eMail* button, an eMail can be sent to a recipient of your choice, in order to preview the contents before sending the serial eMail.

This function is only available if the *SMTP Service* tool has been set up. Additional information can be found in the *Tools* handbook.

12. Automatic Activity

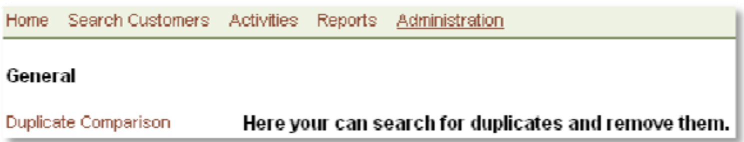
Below each table that shows the results of a search or Research, you will find the link to *Activity*. Clicking on this link will open an additional window.



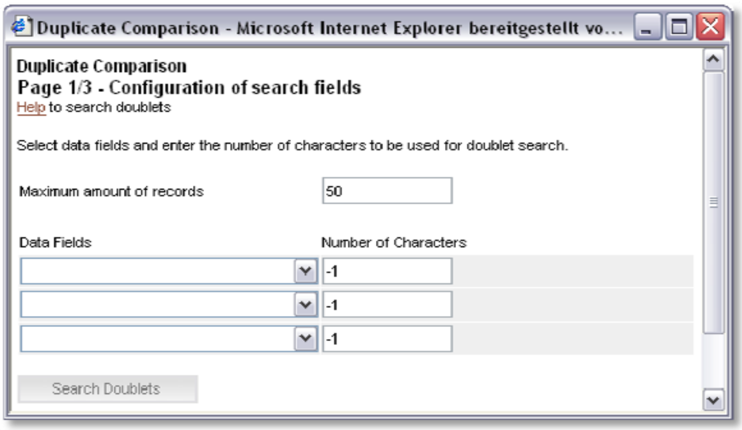
You can enter a *Keyword* and the text of the activity in the *Comment* field. Select the *Department* and the *Employee* responsible for it as well. With the *Settled* setting, you can designate an activity as having been completed. If it is designated as completed, enter the time at which the task was completed in the *settled on* field. If you click *OK*, an activity with your remarks will be created and saved under every customer found in the results table of the search or Research.

13. Doublets Alignment

In the *Administration* menu you have the ability to merge possible duplicates in your database.



Clicking on this link will open an additional window, in which you can define the criteria for the comparison.



You can enter up to three criteria, with which the data records will be compared. Additionally, you can enter the number of characters to be considered from the start of a word. The entry *-1* will compare all characters of the data field. Click on *Search Doublets* in order to start the search.

If the search is complete, the duplicate data records will be shown in groups. You can switch to the master data of a data record directly by clicking the icon. Each duplicate has an option field that corresponds to the master data set. The master data set is the main address, and all additional addresses will be regarded as duplicates. If you highlight a duplicate and click the button to *Merge Data Records*, this data record will be combined with the master record and the duplicate will be deleted. All subordinate data, such as activities, contact persons, etc. will be integrated into the master data record.