

CRM by HansaWorld Training material



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INTRODUCTION

What is Customer Relationship Management

In essence CRM is all about the old saying 'know the customer'.

Previously customer relationships were simple and it was easy for a company to know each customer, their needs and past transactions. With the increase in complexity of relationships, channels and products, coupled with the increasing possibilities for customers to have multi-relationships with different parts of an organisation (accounts, sales, purchase, customer service) that knowledge has become harder to maintain.

CRM seeks to recreate the position where you know your customer and understand what makes them tick. It uses the recent developments in software that allow mapping of complex transactions and relationships to give a holistic picture of a customer and gives the client the same level of service through a range of possible channels.

In a sense it focuses on customer share rather than market share, using the Pareto rule that 20% of your customers will deliver 80% of the value, a part of CRM is about understanding who are the 20%?

This will allow you to focus on the value generating proportion and maximise your 'share of their wallet'. Any CRM initiative will also support the other current management objective - that of maximising shareholder value. It is only possible to maximise shareholder value if you maximise return from customers and therefore offer your customers the products and services they need.

CRM is based around a few principals on customers:

- new customers are expensive to find (estimates put the cost at as much as ten times the cost of a retained customer) and take time to deliver value

lost customers tell many others about their experiences and rarely come back

retained customers are better value and in time move from being clients to becoming advocates working on your behalf

your major efforts should be spent on your best customers or groups of customers - i.e. those that are likely to yield best returns

CRM is about knowing your customers. It is about creating and growing business relationships with your customers. It is about remembering customer preferences and forging long-term relationships by delivering exceptional service and product offerings tailored to them. CRM provides the ability to know which customers are most profitable, determining what drives that profit and ensuring customer-specific business processes and practices maintain or increase that customer profitability. CRM is also having the ability to know which customers are not profitable, why they are not profitable, and being able to change tactics to ensure future profitability.

"CRM is a disciplined business strategy to create and sustain long-term, profitable customer relationships" (J. Curry, author of Customer Marketing Method)

"...at its core, CRM is an enterprise-wide mindset, mantra, and set of business processes and policies that are designed to acquire, retain and service customers" (S. Fletcher, the president of pipeline)

"Customer Relationship Management is a business strategy to select and manage customers to optimise long-term value. CRM requires a customer-centric business philosophy and culture to support effective marketing sales and service processes. CRM applications can enable effective Customer Relationship Management, provided that an enterprise has the right leadership, strategy, and culture." (R. Thomson, founder of CRMGuru.com)

STARTING AND SETTING UP THE CONTACT MODULE

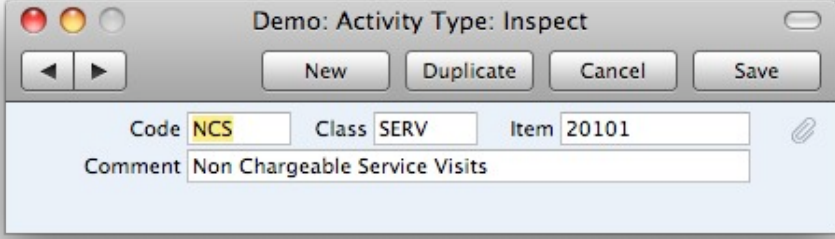
Activity Types

You can record all business events, appointments and tasks as Activities. Through the careful use of Activity Types and Classes, the Activity register can become a valuable source of information recording many different types of customer and other business related operations.

Each Activity Type should represent a specific job or task. All Activities recording the same task should be given the same Activity Type. The Activity Type can be used as a search criterion in many of the reports in CRM by HansaWorld.

In defining your Activity Types, you should define some that can be used for Results, allowing the classification of the outcomes of Activities. This is particularly important if you are using Activity Consequences.

The number of Activity Types should be kept small, and great care should be taken to make them mutually exclusive. Activity Types of a broadly similar nature can be grouped together by assigning each one to the same Activity Class.



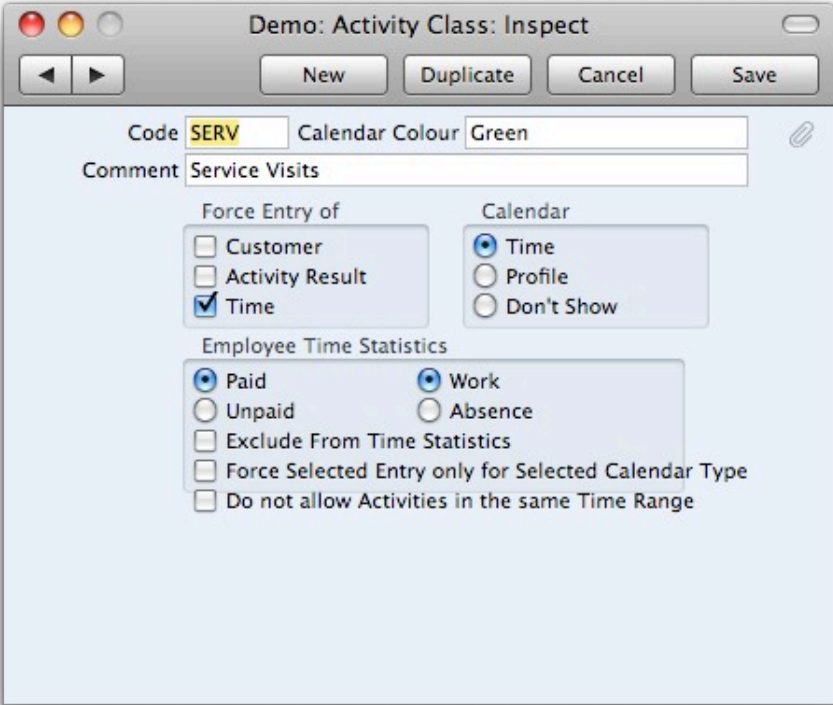
Class All Activities with Activity Types belonging to the same Activity Class will be displayed with the same colour in the Calendar. You can also force a Customer, Result and/or Cost (Time) to be entered for Activities of the same Class.

Item Only Service or Plain Items can be entered here.

Activity Classes

Activity Classes are broad classifications of the various tasks recorded in the Activity register. Examples include: Sales, Marketing, Administration.

Activities with Activity Types belonging to the same Activity Class will be shown with the same colour in the Calendar. Choose that colour using the Calendar Colour field.



Force Entry of Check one or more of these boxes if you would like it to be compulsory for a Customer, Activity Result and/or Time to be entered to all Activities with Activity Types belonging to this Activity Class.

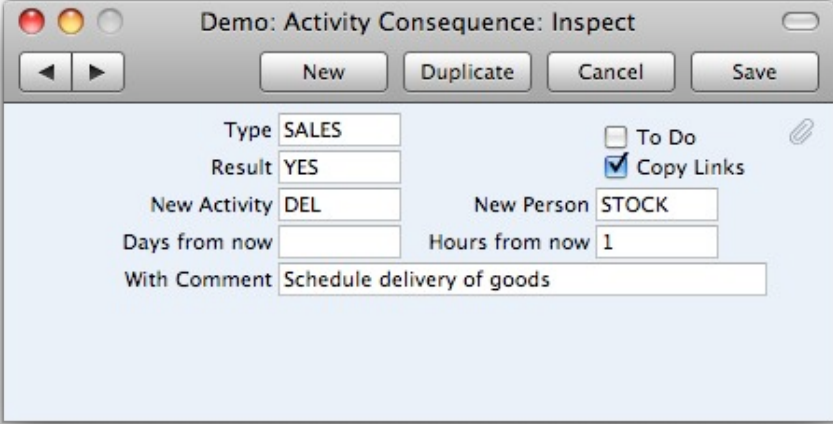
Calendar These options are used to control how the Activities with Activity Types belonging to this Activity Class are shown in the Calendar. Please refer to the section below describing the 'Task Type' card of the Activity screen for details of each option.

Employee Time Statistics These options control how Activities with Activity Types belonging to this Activity Class are displayed in the Employee Time Statistics report.

Paid, Unpaid, Work, Absence Choose the Paid/Work combination if you want Activities with Activity Types belonging to this Activity Class to be shown in the main section of Employee Time Statistics report and in the main totals for each employee.

Activity Consequences

This setting controls the automatic creation of new Activities from existing ones that have particular combinations of Activity Types and Results.



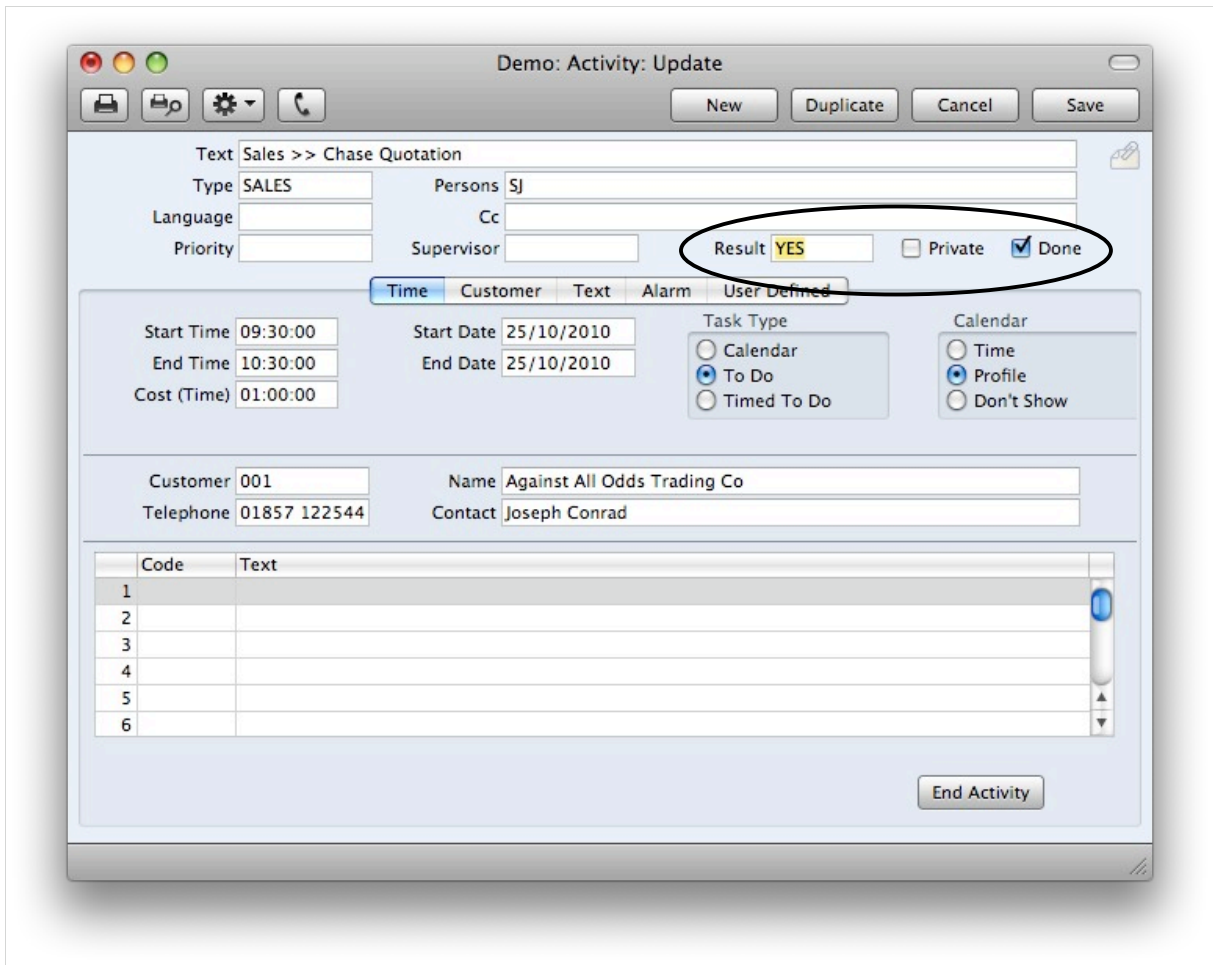
Type	SALES	<input type="checkbox"/> To Do	
Result	YES	<input checked="" type="checkbox"/> Copy Links	
New Activity	DEL	New Person	STOCK
Days from now		Hours from now	1
With Comment	Schedule delivery of goods		

This can be useful when, for example, you make a sales call and find that the person you are calling is on holiday. In this situation, you can set up an Activity Consequence record that will automatically create a new Activity to remind you to call them again a few days later.

You can also create an activity consequence for a different department or person. In the above example the activity was a sales call and the result is that the customer purchased the items. We have created an activity consequence which will create a new Activity "DEL" for our Stock department, one hour after the call, to schedule a delivery of these items to the customer.

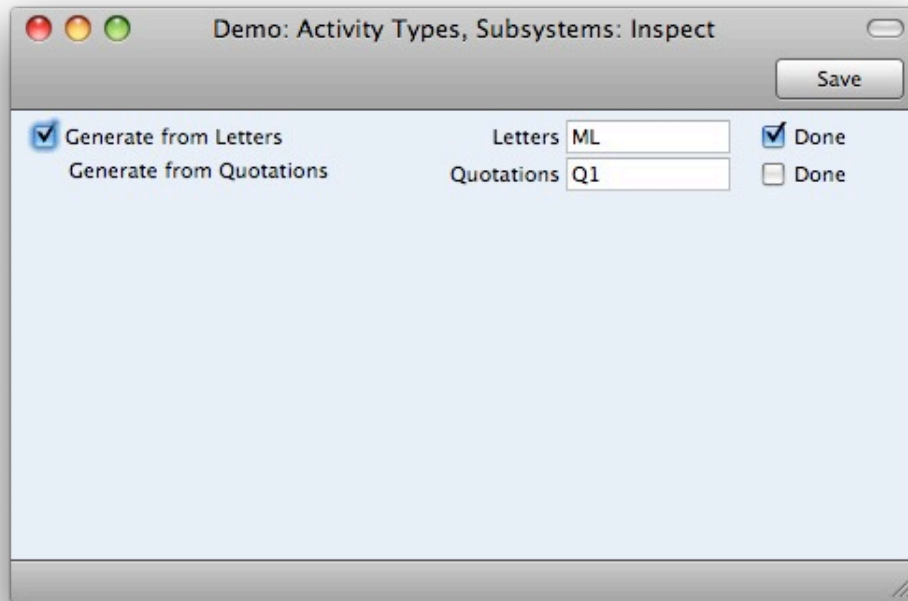
Copy Links: Check this box if you would like the attachments of the old Activity to be copied to the new one.

The new activity will be created when the first activity is marked as done and saved. The new activity will get the activity type from the 'New Activity' field and the date and time calculated from the fields 'Days from now' and 'Hours from now'. If 'New Person' is left blank the same person will be used on both activities.



Activity Types, Subsystems

It is possible to have an Activity created automatically on the completion of another task. This feature is controlled using this setting.



Activities can be created using the 'Create Activity' function on the Operations menus of the Customer Letter or Quotation. You can define which Activity Types these Activities will have in this setting by filling in the corresponding field on the left.

In the case of Customer Letters, activities can be created automatically when records are approved and saved. Check the box named 'Automatically' if you would like this to happen. This will not affect the 'Create Activity' function. The Activities created will be given the Activity Type specified on the left.

Check the 'Done' box on the right if you would like new Activities to be marked as Done when they are created from a particular register.

Contact Classifications

This setting allows you to define any number of Classifications from which you can categorise your Customers, perhaps recording their relationship to you (e.g. lead, service customer or retail customer), specifying the area customer is situated, specifying the business type etc. This is a great tool for reporting purposes – to get more specific reports about certain types of customers. See chapter “Using contact classifications” for more information about contact classifications usage.

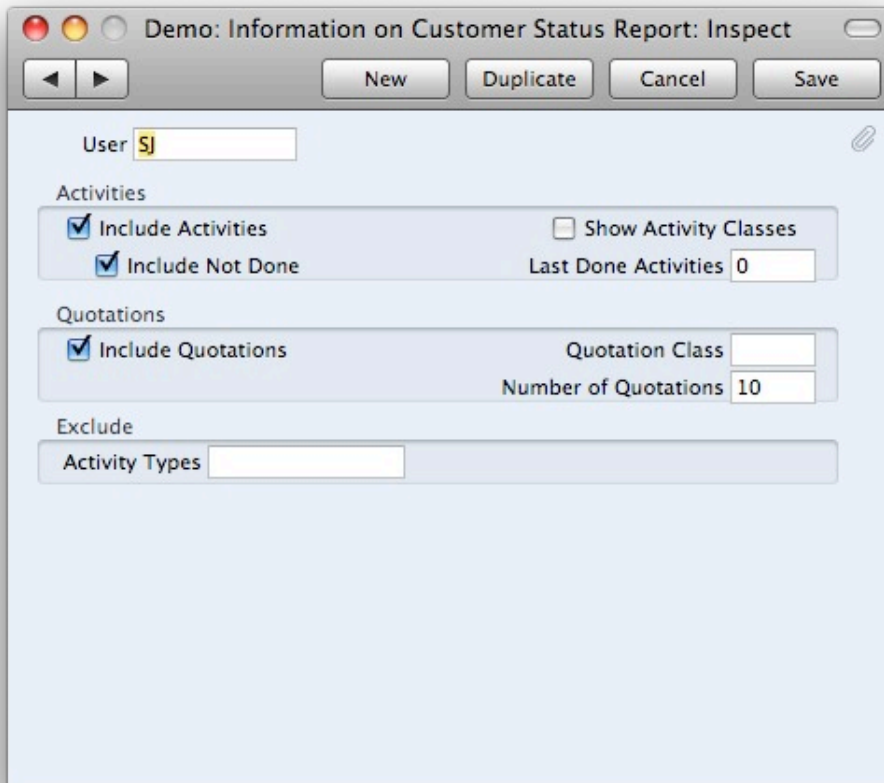
Classification Types

Classification Types are used to divide the Customer Classifications into groups for reporting purposes. They can be divided for example into Regions or Industries.

Info on Customer Status Report

The Customer Status Report is a vital part of CRM by HansaWorld functionality. It provides a one-stop information overview.

The 'Info on Customer Status Report' setting is used to control the appearance of the Customer Status Report. The report can be run from the Operations menu function of the 'Contacts: Browse' and 'Contact: Inspect' windows. This setting can be set up for each individual user to show information related to his/her role in the company.



Demo: Information on Customer Status Report: Inspect

User

Activities

Include Activities Show Activity Classes

Include Not Done Last Done Activities

Quotations

Include Quotations Quotation Class

Number of Quotations

Exclude

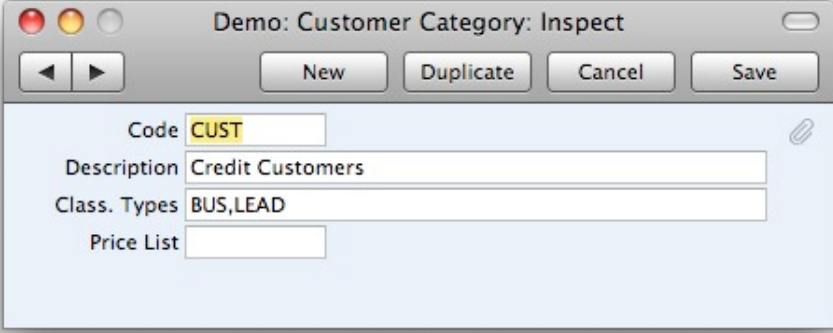
Activity Types

Check the type of information you want to see on the Customer Status Report. Specify how many entries you want to see or leave the field blank to see all.

When selecting 'Show Activity Classes', a summary of used Activity Classes will be shown instead of the individual activities (even if you have checked 'Include Activities').

Customer Categories

The Customer Categories provides a different means of classifying Customers compared with the Contact Classifications. You will usually use the Category to record the types of business in which your Customers are engaged. You can allocate more than one Customer Classification to each Customer, however only one Category.



Code Specify a unique code, by which the Customer Category may be identified from the Customer screen and elsewhere.

Description Enter text describing the Customer Category here.

Class. Types Enter one or many classification types separated by a comma to make it mandatory to enter classifications on customers with this defined category. After adding classification types here you will see another paste window when using paste special into the contact classification field which will help you enter the correct classification.

Price List The Price List entered here determines the prices used in quotations for all Customers belonging to this Category.

User Defined Fields - Contacts/Activities

The Customer/Activity record is capable of storing a sufficient amount of information to cater for most requirements. However, in some circumstances, it might be necessary to store additional information for which no fields have been provided. The User Defined Fields setting in the Contact module allows you to add your own fields to each Customer record and each Activity for this purpose. The new fields will be visible on the 'User Defined' card of each Customer and Activities record.

WORKING WITH CONTACTS

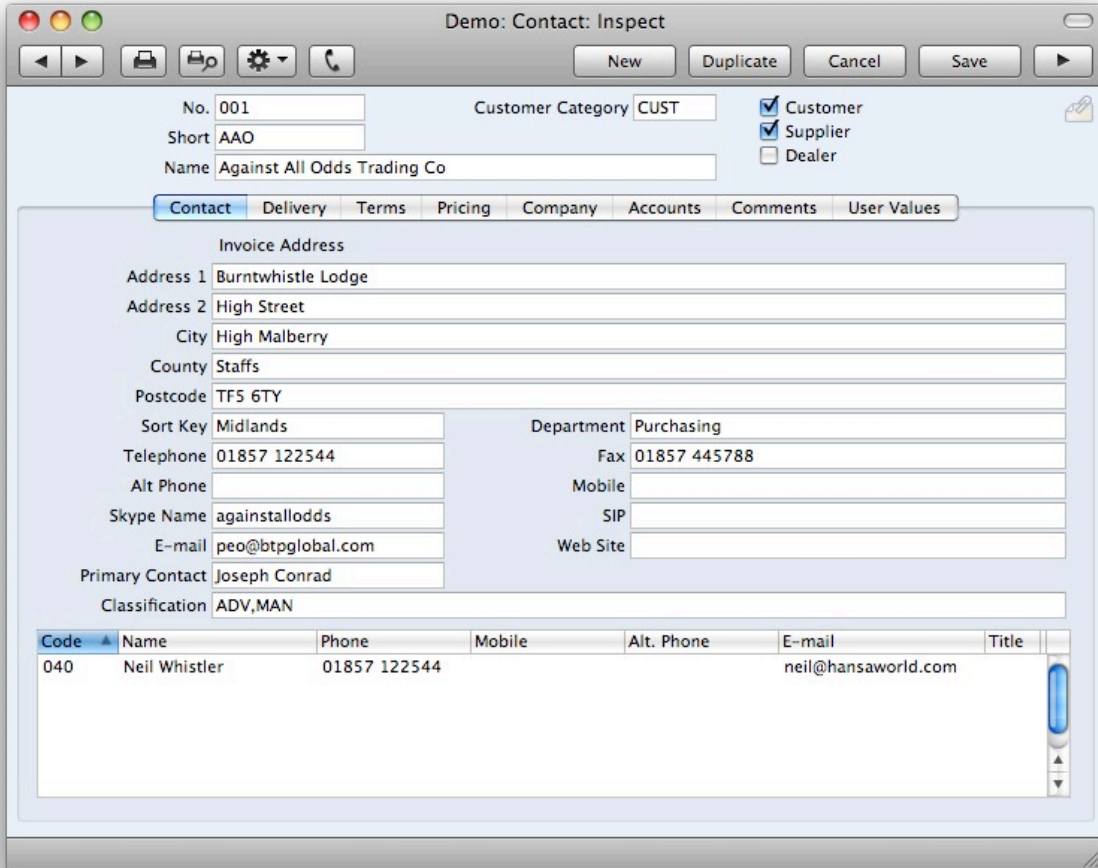
The Contacts register is where you store information about your customers, suppliers and dealers.

Contacts can be arranged into hierarchies, a contact can have many other contacts connected to it. All the connected contacts will be shown in a list in the contact window. For example — a contact of type Customer might have a number of other contacts of type Contact Person connected to it. If you want to add a 'sub contact' to a contact, use the 'Create Contact' function on the Operations menu. The relation between different contacts is stored in a register called 'Customer Relations'.

To find a specific Contact, you can sort the 'Contacts: Browse' window by the field you want to search (e.g. Customer No.) and type the string to search for into the search field. Further search functionality is available from the Operations menu of the Browse window (e.g. to search Contact by e-mail).

Entering a Contact

The following section describes some of the most important fields of the Contact register.



The screenshot shows a software window titled "Demo: Contact: Inspect". At the top, there are navigation buttons (back, forward, print, settings, phone) and action buttons (New, Duplicate, Cancel, Save). The main form contains the following fields:

- No. 001
- Short AAO
- Name Against All Odds Trading Co
- Customer Category CUST
- Customer
- Supplier
- Dealer

Below these are tabs for Contact, Delivery, Terms, Pricing, Company, Accounts, Comments, and User Values. The "Contact" tab is active, showing "Invoice Address" details:

- Address 1 Burntwhistle Lodge
- Address 2 High Street
- City High Malberry
- County Staffs
- Postcode TF5 6TY
- Sort Key Midlands
- Department Purchasing
- Telephone 01857 122544
- Fax 01857 445788
- Alt Phone
- Mobile
- Skype Name againstallodds
- SIP
- E-mail peo@btpglobal.com
- Web Site
- Primary Contact Joseph Conrad
- Classification ADV,MAN

At the bottom, there is a table with the following data:

Code	Name	Phone	Mobile	Alt. Phone	E-mail	Title
040	Neil Whistler	01857 122544			neil@hansaworld.com	

No. Enter the unique code you are assigning to this Contact. This field holds up to 20 characters and/or numbers. CRM by HansaWorld offers a default code based on the code of the last saved Contact.

Category Enter the customer and/or supplier category for this Contact.



Type Checkboxes Use these options to specify whether this contact is a customer, supplier or dealer. You can tick as many check boxes as you like. If no checkbox is ticked it means that the record is a contact person.

Short This field can be used as an alternative means of identifying this Contact - information entered here appears in the Short column in the 'Contacts: Browse' window. Contacts of a similar nature (e.g. same industry) could be given the same Short Code so that they would be grouped together in the 'Contacts: Browse' window when sorted by the Code column.

Name Enter the Name of the Contact.

Contact Card

Department The Department Name can be recorded here. This might be necessary if you are dealing with several Departments of the same Contact.

Alternatively, if your company has several departments, the one responsible for this specific Contact can be recorded here. The Contact List report can be sorted into Department order.

Sort Key This field can be used in countries where a post code, zip code or other area code appears on a separate line in an address. Note that, if the field is used for this purpose, it will need to appear on the document Forms. Therefore, the standard forms supplied by HansaWorld will need to be modified accordingly using the Form register in the System module.

Telephone, Fax, Mobile, E-Mail, Skype, SIP The contact card enables you to save contact information for different means of communication. Besides traditional ones like telephone and fax, it even allows you to save e-mail, Skype ID and SIP address. All these information can be used to get into contact with the customer directly through Business Communicator.

If you are using the HansaWorld Fax Server, the fax number will be used when faxing documents to this Contact.

Primary Contact The name of your main contact person can be entered here: This name will be brought in as a default whenever the Customer is used in a Quotation or Activity. If you need to add more contact names, use the 'Create Contact' function on the Operations menu.

Classification This field provides a further means of grouping Contacts of a similar type together. It can be used as a reporting and mailing criterion in the Contact module and it is possible to allocate more than one Classification to each Contact, separated by commas.

The 'Add Classification to Customer' Maintenance function in the Contact module can be used to assign Classifications to all, or a range of Customers.

Delivery Card

Sales Del. Terms Specify the Delivery Terms for this Contact here. You will tend to use this field for international Contacts: examples might be Cost, Insurance, Freight or Free On Board.

For each Delivery Term record you can specify translations in different Languages: the Language for the Contact will determine the text to be printed.

Sales Del. Mode

Enter the mode of shipping most commonly used for this Contact. Examples might be Post or Courier, or might specify the name of one of the couriers that you use.

Terms Card

Sales Pay. Terms Specify here the Payment Terms to be used with the Contact.

Their Supp. Code Enter the Supplier Number allocated to your firm by this Contact. It can be printed on Sales documents.

Invoice To If the Customer will not be paying your Invoices themselves but may, for example, be purchasing through a leasing company, enter the Contact Number of that company here.

Creation Date This field automatically records when this Contact was added to your CRM database. It cannot be changed by the user. The Contact List report can be used to list Contacts that were added or changed after a certain date.

Last Changed This field is updated automatically by HansaWorld whenever any modification is made to the Contact record on screen.



Closed Check this box if the Contact is no longer to be used. Closed Contacts will appear in the 'Contacts: Browse' window but not in the Contacts 'Paste Special' list. You will not be able to enter Quotations for closed Contacts. A closed Contact can be re-opened at any time.

No Mass Letters Printed letters will be only sent to this Contact if they are specifically addressed to this Contact. The Contact will not be included in any mass-mailing campaigns. A mass-mailing campaign is one generated from a Customer Letter whose Customer field is empty.

No Mass Mailing Analogous to 'No Mass Letters', but for e-mail mass-mailings.

Pricing Card

Price List If you wish to assign a particular Price List to a Contact, you can do so here. It will determine the prices used in Quotations for this Contact. Note that it is also possible to allocate Price Lists to Customer Categories. Any Price List specified here will override that of the Customer Category.

Salesman Enter the signature of the salesman responsible for this Contact's account.

Sales Group The Sales Group is brought in from the Person record after you have entered a Salesman. It can be used to restrict the access to this contacts and its quotations to salesmen of this Sales Group.

Language It is possible to set up different versions of documents such as quotations for Contacts with different Languages: the Language code specified here will be used as a default in determining which document is used.

Company Card

Comment This field can be used to record any additional information about the Contact. Comments entered here will be shown on reports featuring this Contact.

Warning If the Contact is a Customer, text entered here will appear as a warning whenever you enter quotation for the customer. Warnings can be freely defined.

Reg. No. 1 If the Contact is a limited liability company, enter their Company Registration Number here.

Sales VAT Code The Sales VAT Code will determine the rate at which VAT will be charged in sales to this Contact and the Output VAT Account to be credited. Usually, you should only specify a Sales VAT Code here for an individual Customer if for some reason your usual VAT accounting method does not apply to them.

VAT Zone Select a VAT Zone for this Contact. This will be used in to control VAT calculation.

VAT Reg No It is important that the Contact's VAT Number is recorded here if they are in the "Within EU" Zone as this information is required for EU VAT reporting purposes.

CRM by HansaWorld contains a feature whereby it will check that the VAT Number entered here is in the correct format for the Contact's Country. The correct format should be defined in the 'VAT Reg. Number Masks' setting in the System module. If the Country is blank, the Country from the Company Info setting will be used. If that is blank, no validation check will be made.

Because of this feature, be sure to enter the Contact's Country above before their VAT Number.

Accounts Card

Bank Account Enter the Contact's main bank account number here.

Account Operator Enter the name of the Contact's bank or building society here.

Comments Card

Title The Job Title of the Contact, as it appears on their business card. This can be included when addressing letters to Contacts.

Job Description This field is used to describe the role of the Contact within their company. It should be used to side-step any slight differences in Job Title terminology that may exist in different companies. For example, the generic role of Finance Director might have “Director (Finance)” as its Job Title in one company but “Director of Finance” in another. The generic title (“Finance Director”) would be placed in the Job Description field of such Contacts, to enable you to mail all Finance Directors together, irrespective of differences in inter-company terminology.

Salutation 1, 2 and 3 These fields can be used to record greetings with various degrees of formality. It is recommended that you enter Salutations in all three fields, even if they are the same. When you design the Forms that will be used to print Customer Letters, you can include the Salutation 1, 2 or 3 fields depending on the formality of the letter.

Operations Menu

The Operations menus for Customers are shown above. This is the one for the ‘Customers: Browse’ window.

Customer Status	⇧ ⌘ E
Search	⌘ F
Create Activity	⇧ ⌘ C

You can also apply the function to a group of Customers. This menu is the for the Customer detail windows.

Customer Status	⇧ ⌘ E
Create Contact	
Create Activity	⇧ ⌘ C
Create E-mail	⇧ ⌘ M
Update Contact Persons	

Customer Status

The ‘Customer Status’ function provides a short-cut to the Customer Status report.

In its basic form, this report shows address, activities and quotations information and lists all Contact Persons for the Customer currently on screen or for those Customers highlighted in the browse window. However, if required, more information can be shown in the report, the ‘Info on Customer Status Report’ setting in the Contact module can be used to control how much additional information that will be shown to different users.

Add existing Contact

This function can be used to connect an existing Contact with this Contact Record. This contact will be shown in the contact persons grid.

Create New Contact

This function can be used to create an new Contact and link it to the highlighted Contact Record. This contact will be shown in the contact persons grid.

Create Activity

This function can be used to create records in the Activity register in the System module.

The new record is opened in a window entitled ‘Activity: Inspect’. This means that it has already been saved and is being opened for checking. The Customer Number, Name and Phone Number are brought in automatically to the fields on the ‘Customer’ card. No default Activity Type will be offered, while the Task Type will be To Do, and the Symbol will be Other. The Start Date of the Activity will be the current date, and the Person will be the current user.



After amendment if necessary, save the record in the Activity register by clicking the [Save] button in the Button Bar and close it using the close box. Alternatively, if you no longer require the Activity, remove it using the 'Delete' function on the Record menu.

Update Contact Persons

This function will update the address on all contacts that are connected to the current contact where you select this option.

Business Communicator

Calls or mails can be started straight from the address book, leaving a trace in the contact history. Incoming calls can be tied to contacts in the address book and communication history opens up automatically so you can give customers answers based on accurate information. You can see who is on the phone and who they are talking to. This helps you with making an informed decision on whether to disrupt that conversation by transferring another call or not. Business Communicator is described in more detail later.

CLASSIFYING AND CATEGORISING YOUR CONTACTS

Contact Classifications allow you to categorise your Contacts, perhaps recording their relationship to you (e.g. area in which the customer is based, turnover, industry, marketing source).

The setting Contact Classifications allows you to define any number of Classifications, which you then can add to customers and run reports on. This is a great tool for reporting purposes – to get more specific reports about certain types of customers.

Using Contact Classifications in Reports

The Customer Classification can be used as a search criterion in many reports in the contact module, on some exports and maintenance routines as well as on some reports in the System module. You can divide Customer Classifications into Classification Types, allowing great flexibility.

In the Report specification window you can enter one, or several classifications. How to use them exactly for the best results is described in this chapter. The following symbols can be used:

AND	“ , ”
OR	“ + ”
NOT	“ ! ”
Wildcard	“ * ”

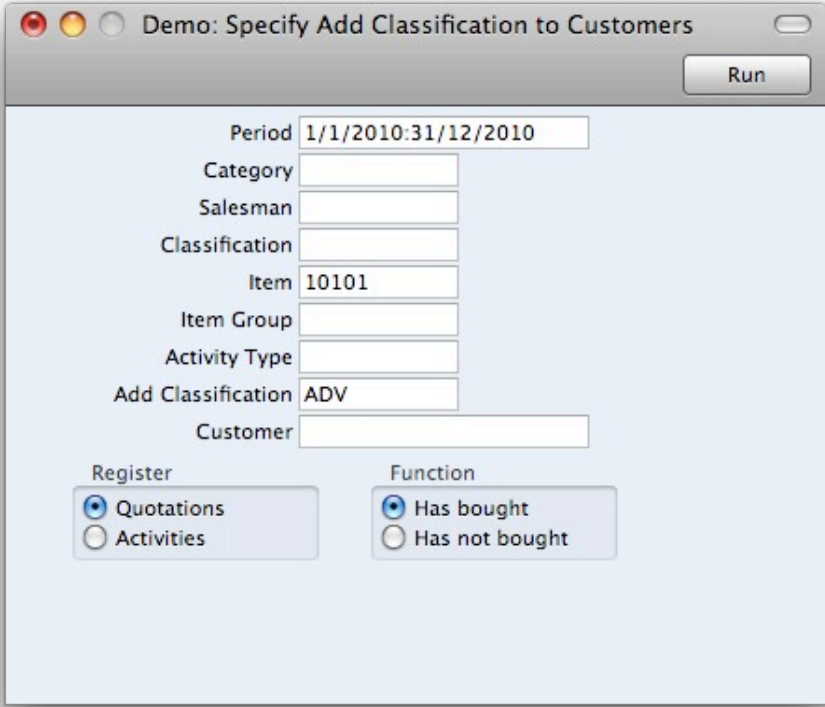
Examples:

AAA,BBB	Customers with classifications AAA and BBB
AAA+BBB+CCC	Customers with classifications AAA or BBB or CCC
!AAA	Customers without classification AAA
!(AAA,BBB)	Customers without classification AAA and BBB
!AAA+BBB	Customers without classification AAA or with classification BBB
(AAA,BBB)+(CCC,DDD)	Customers with classifications AAA and BBB or CCC and DDD
103*	Contacts with 103 in the beginning of classification (103,1031,1032....)
*ENT	All contacts with ENT in the end of classification (HWENT,100ENT,ENT)
103*,!103	All beginning with 103 but excluding 103
300*+MSK+!BIG	Classification with 300 in the beginning or MSK or not BIG
30*,*MNT	Contact with classifications with 30 in the beginning and MNT in the end

Advanced use of classifications

Add Classification to Customers

This function is a Maintenance Routine within the Contact module. It can be used to add a particular Customer Classification to the Customers that have bought or not bought a specific Item or have a specific Activity type registered to them.



Period The function will search Quotations or Activities in the specific period.

Category If a Customer Category is entered here, the function will search for the Customers belonging to that Category that have bought or not bought the specified Item. It will then add the new Classification to those Customers.

Salesman Enter a Person's initials for the new Classification to be added to all Customers with a particular Salesman that have bought or not bought the specified Item.

Classification If a Customer Classification is entered here the function will only add a classification to Customers that already have the specified Classification added on their record. If you enter a number of Classifications separated by commas, the function will search for the Customers with all the Classifications that you have entered.

Item This function is important when you run the maintenance according to bought items. Specify here the Item that is to be the subject of the function: the new Classification will be added to all Customers that have bought or not bought this Item. The function will have no effect if you do not specify an Item.

Add Classification Specify here the Classification that is to be added to your customers. If a particular Customer already has this Classification, it will not be added again.

Register Choose which version of the function is to be used:

Activities The function will search the Activities register to find Customers that have or have not Activities of a specific Activity type. Example of use: All customers who have attended your seminar, can be classified with a certain classification.

Quotations The function will search Quotations to find Customers that bought the specified Item. It will only consider accepted quotations.

Function Choose whether the new Classification is to be added to Customers that have bought or not bought the specified Item, or alternatively have got or not got a specific activity type.

Close Contacts

This function is a Maintenance Routine within the Contact module. It can be used to close a Contact by Category or Classification. You can use it together with previously described maintenance to close contacts that have not bought from You a long time.

Remove Classification

This function is a Maintenance Routine within the Contacts module. It can be used to remove a Classification from all Contacts.



Demo: Specify Remove Classification from Customers

Run

Classification ADV

Category

Customer

Include Suppliers

Include Contacts

Include Dealers

Classification Specify the single Classification that is to be removed from the Contact. If you want to remove more than one Classification, run the function as many times as necessary.

Category If a customer category is specified here only the customers of this category will be affected by the function.

Customer If a customer is specified here only this customer will be affected by the function.

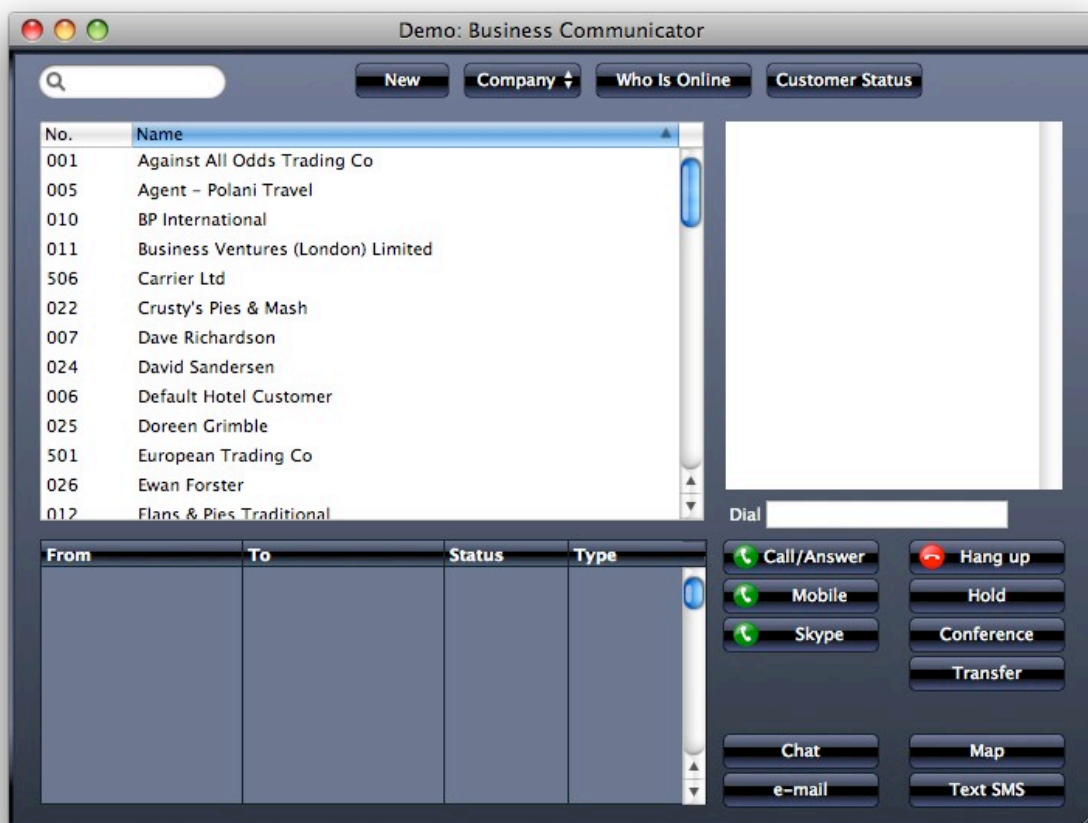
You can choose what type of Contacts that you want to be included in the updating process.

Press the [Run] button to start the updating process.

BUSINESS COMMUNICATOR

There are several communication methods available today (land lines, mobile phones, voice-over IP, text SMS, e-mail, instant messaging). Each of these methods require a separate tool and each tool has its own set of addresses or numbers. It is easy to waste time searching for the appropriate tool and for the relevant address or number. It is also difficult to maintain a unified history for each of your contacts.

To fully benefit from the various communication methods you need to bring them together in a unified communication centre. By having a single contact register, you will spend less time on finding and retyping numbers or addresses.



Business Communicator is a unified communication centre providing the following main benefits:

1. Business Communicator allows you to maintain a single contact list that can be used by every member of your organisation. This contact list can include telephone and mobile numbers, Skype, SIP and e-mail addresses. You can also maintain your own personal contact list which will not be visible to your colleagues.

2. By using the Business Communicator control panel you can initiate outgoing communications using Skype, Asterisk-based SIP or SMS text messaging - make and receive Skype or SIP calls, initiate chats or send SMS text messages from a single screen.

3. Incoming calls through Skype or SIP are identified and you are provided with information about the caller instantly.



4. Business Communicator encourages you to record details about each incoming and outgoing communication as you talk, enabling you to build up a comprehensive communication history about each caller or contact person. With every call, Business Communicator automatically opens an Activity window, making it easy for the user to add comments.

5. Business Communicator control panel also helps you with transferring calls, and helps ensure calls are not lost.

Contacts in Business Communicator

Contacts in Business Communicator fall into two categories:

Company Contacts

These are Contacts belonging to the entire system.

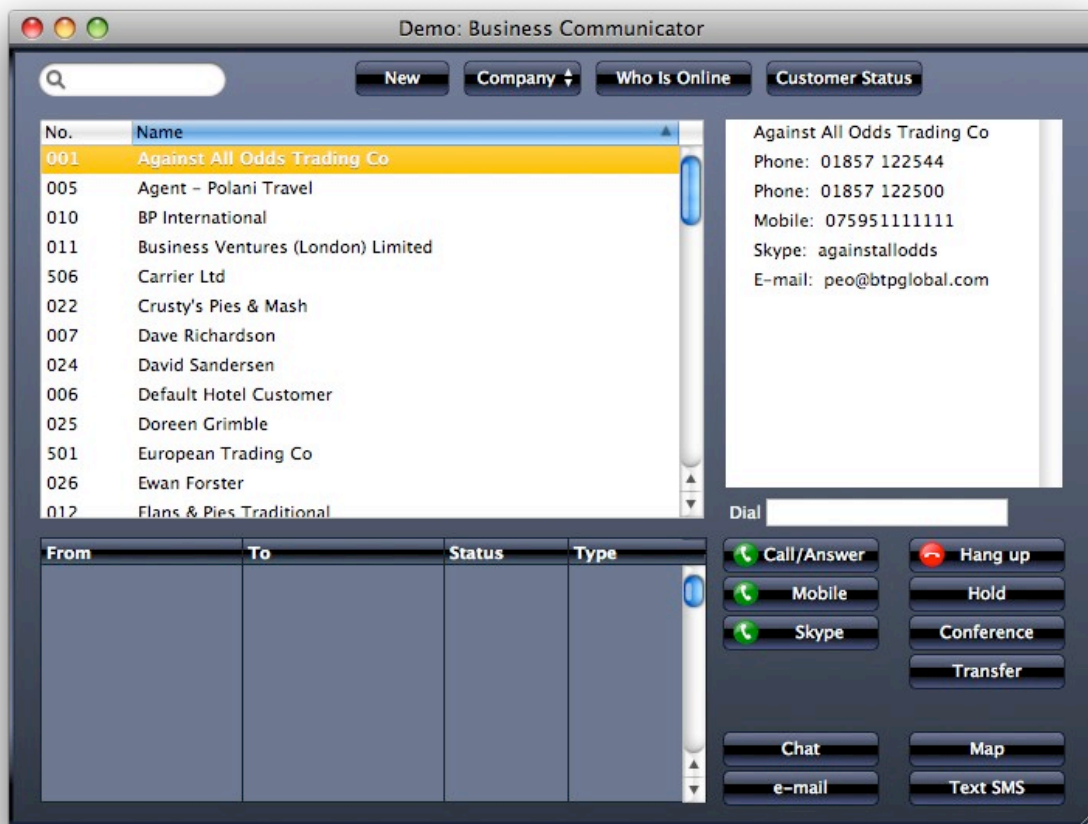
Personal Contacts

These are Contacts belonging to a particular user. They include Skype Contacts imported by that user. You can choose to see your personal contacts only, if you like.

Modifying a Contact is as easy as elsewhere in the system - find it in the list and double-click. If the Contact is one that you imported from Skype, all information from the Contact's Skype Profile will have been imported to the appropriate fields. Enter other information as appropriate. Be sure to enter the address lines in the correct fields if you want to use the Map feature (described below).

Communicating with Contacts

To communicate with a Contact, first find them in the Contact list on the left-hand side of the Business Communicator's window, then click once on their name. Possible contact methods will be listed in the area on the right-hand side of the window:



Choose the communication method from the right hand panel and press the respective function button (call, chat, e-mail, SMS). Calls can be made through Skype and Mobile phones with installed Business Communicator Mini. Contact Your local HansaWorld representative for technical details or see www.hansamanuals.com.

To answer an incoming call, click respective call button with the green telephone icon. If you already have an open call when you get the incoming call, you will be asked if you want to put the existing call on hold.

Business Communicator allows you to maintain a call history for each Contact: a new Activity will be opened automatically whenever a Contact answers a call or an incoming call is answered, allowing you to record the details of the call. When the call finishes, you can save the Activity by clicking the [Save] button in the Button Bar or the [End Activity] button at the bottom of the window.

A new Activity will not be opened for chats, as chatting does not affect the Call History with the Contact in Business Communicator.

SMS

The "Text SMS" button in the Business Communicator will use Internet Services for sending SMS messages. Use this tool to communicate with your contacts and other staff. Inform your customer about a seminar or remind your colleague about a meeting.

Type and send text messages straight from your ERP system.

Conference Calls

To open a conference call (a call with more than two participants), follow these steps:



- Make or receive a call.
- Put the call on hold.
- Make or receive a second call.
- Click the [Conference] button.

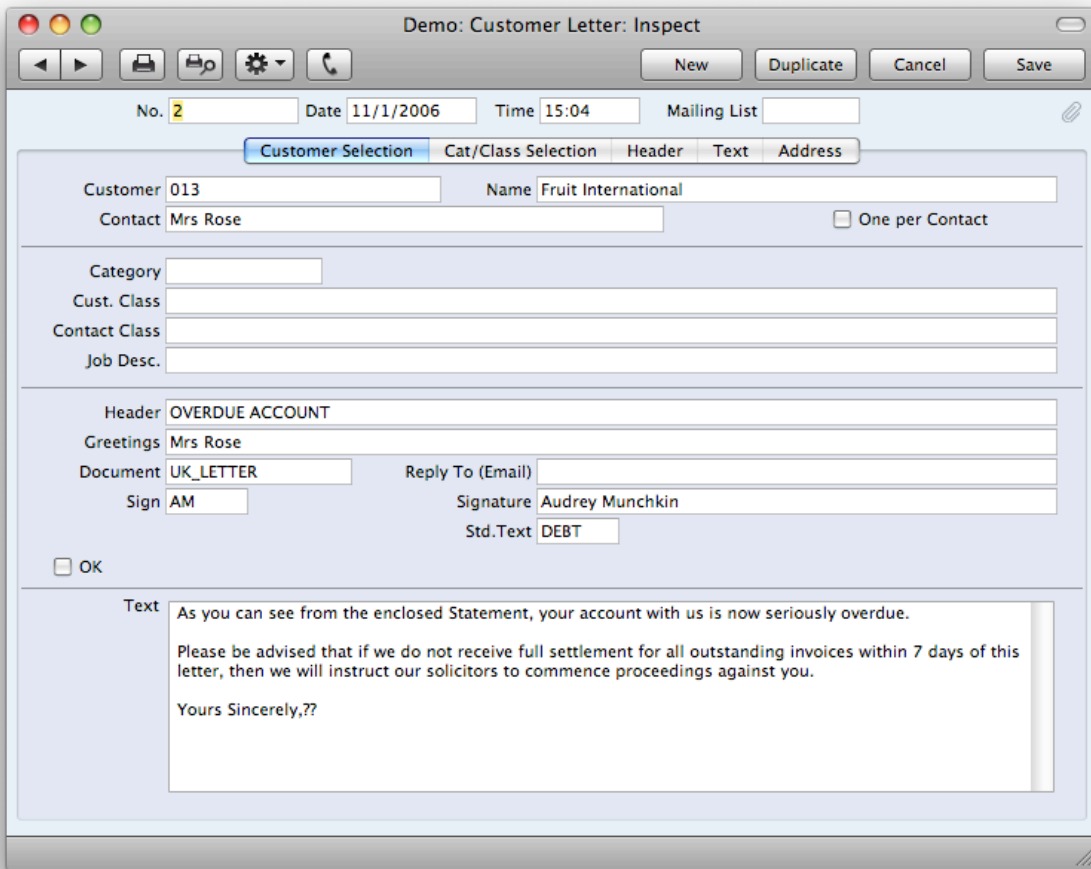
Producing a Map showing the Location of a Contact

To see a map showing a Contact's location, click on the Contact in the Contact list, then click the [Map] button. A new browser window will open in your default browser, using maps.msn.com and the address information in the Contact record to show you where the Contact is.

SENDING LETTERS

This register is used to send letters to Customers: it provides a mechanism whereby standard or ad hoc letter texts can be matched with one or more addressees. Letters can thus be sent to individual Customers or mail shots produced to a range of Customers.

Use the Search function in Operations menu of Browse window to find particular Customer Letter by Text and Date in Period.



The screenshot shows a software window titled "Demo: Customer Letter: Inspect". At the top, there are navigation buttons (back, forward, print, copy, settings, help) and action buttons (New, Duplicate, Cancel, Save). Below this is a header section with fields for "No." (2), "Date" (11/1/2006), "Time" (15:04), and "Mailing List". A tabbed interface is present with tabs for "Customer Selection", "Cat/Class Selection", "Header", "Text", and "Address". The "Customer Selection" tab is active, showing fields for "Customer" (013), "Name" (Fruit International), and "Contact" (Mrs Rose). There is a checkbox for "One per Contact". Below this are fields for "Category", "Cust. Class", "Contact Class", and "Job Desc.". The "Header" section includes "Header" (OVERDUE ACCOUNT), "Greetings" (Mrs Rose), "Document" (UK_LETTER), "Sign" (AM), "Reply To (Email)", "Signature" (Audrey Munchkin), and "Std.Text" (DEBT). An "OK" checkbox is also visible. The "Text" section contains a text area with the following content:

As you can see from the enclosed Statement, your account with us is now seriously overdue.

Please be advised that if we do not receive full settlement for all outstanding invoices within 7 days of this letter, then we will instruct our solicitors to commence proceedings against you.

Yours Sincerely,??

Customer Enter the Customer Number of the Customer to whom the letter is to be addressed. If you want to mail a range of Customers, you can use the Period-character ":", e.g. "010:045" to select customers 010 to 045. To select all customers fill in "*" symbol in this field. To limit the mailing to customers with specific attributes, use the other fields to specify these attributes (like Contact Class).

Contact If a single Customer Number has been specified, it is possible to mail a particular Contact at that firm by entering their name here. The 'Paste Special' function only lists Contact Persons for the Customer in question.

If no Contact is specified here and the One per Contact check box below is not checked, a single letter will be produced for each selected Customer, addressed to the main Contact entered on the 'Contact' card of each Customer record.



One per Contact Check this box if you would like to print a separate letter for each Contact for each selected Customer (i.e.

those in the Contact Person register and those entered on the 'Contact' card of each Customer record). Letters will not be printed for Contact Persons whose No Letters or Closed boxes have been checked.

If this box is not checked and no Contact is specified in the field above, a single letter will be produced for each selected Customer, addressed to the main Contact entered on the 'Contact' card of each Customer record.

If the check box is on, it will override any entries that have been made to the Contact Classification and Job Description fields on the 'Cat.' card.

Document If you wish to use a different Form for a particular Customer Letter, specify that using the Document field. The Form specified in this field will be used instead of that specified in the 'Define Document' window.

Std. Text If appropriate, use this field to select a Standard Text record. The text itself will be inserted into the field on the 'Text' card. Standard texts are found in a setting in the contact module.

OK The OK check box should be switched on once the Customer Letter record has been checked and approved. Until it has been switched on, any letters printed from the record will be marked as a "Test Printout".

Category If you wish to mail all Customers of a particular Category (or range of Categories), specify that here. This field assumes that the Customer field on the 'Customer' card is blank: it will be ignored if the Customer field contains a value.

Language You can specify in the 'Define Document' window for the Customer Letter document that Letters can be printed using different Forms depending on the Language of the Customer Letter.

Cust. Class If you wish to mail all Customers of a particular Classification, specify that here.

If a range of Customers has been entered to the Customer field on the 'Customer' card, all Customers in that range that are of the particular Classification will be mailed.

Contact Class If you wish to mail all Contacts of a particular Contact Classification, specify that here. This field assumes that the Customer field on the 'Customer' card contains a value and that the One per Contact box is not checked. It will have no effect if one or both these conditions are not met.

Job Desc If you wish to mail all Contacts of a particular Job Description, specify that here.

This field assumes that the Customer field on the 'Customer' card contains a value and that the One per Contact box is not checked. It will have no effect if one or both these conditions are not met.

Inspecting and Approving Customer Letters

Before printing the letters as determined by a Customer Letter record, it is worth checking that the letter text contains no errors and that everyone that should receive a letter will do so, especially if the Customer Letter record represents a large mail shot. To do this, use the 'Letter List' function on the Operations menu. This produces a report showing the full letter text and a list of recipients.

Printing Customer Letter

Two methods are available by which the letters determined by a Customer Letter record can be printed. In both cases, if the Customer Letter record has not been approved, all printed letters will be marked "Test Printout". The two methods are—

1. With a Customer Letter record on screen, click the Printer icon.
2. Use the 'Documents' function. Double-click 'Customer Letters' in the resulting list. This method allows you to print letters from a range of Customer Letter records.

Faxing Customer Letters

If you want to fax a letter instead of printing it and are using a Macintosh with a fax modem, follow these steps—

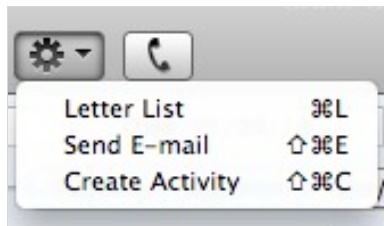
1. Having entered the Customer Letter as usual, select 'Documents' from the File menu.
2. Highlight 'Customer Letters' in the list.
3. Select 'Fax' from the Operations menu.
4. Double-click 'Customer Letters' in the list and proceed in the usual way.

If you have a fax server, you can configure a more permanent arrangement whereby certain Customer Letters are always faxed. In the Contact module, select 'Documents' from the File menu. Highlight 'Customer Letters' in the list and select 'Define Document' from the Operations menu. Enter a row with the appropriate Form and quoting your fax server in the Printer field. This row should have a dedicated Language (e.g. "FAX") in the Lang field or a dedicated Number Series in the Ser. No. field. Contact Your local HansaWorld representative for technical details or see www.hansamanuals.com.

When you enter a Customer Letter that is to be faxed, ensure it has the correct Language on the 'Cat.' card or that you assign it a Number that is in the correct Number Series. A form must be specified in the Document field on the 'Header' card.

Operations Menu

When a Customer Letter is open in a record window, the Operations menu is available.



Letter List Select this command to produce an instant report showing the letter text and a list of recipients.

Send Email This function will send the letter text to all recipients by e-mail. This is the easiest way of delivering customer letters to your contacts compared to Fax and Printing. Contact Your local HansaWorld representative for technical details or go to www.hansamanuals.com.

Create Activity This function can be used to create Activities. This can be useful if it is necessary, for example, to schedule a print run.

The Standard Text Setting This setting can be used to build up a library of standard letters to be used at particular stages in the development of the relationship with a Customer. These standard texts can be referred to from the Customer Letter register.

WORKING WITH TIME

CRM by HansaWorld offers you two main ways to organise your time, each of which gives you again manifold possibilities of organising and managing time and events. One way is through Activities, the other way is through Target Time. Both ways are described in this chapter in greater detail.

Activities

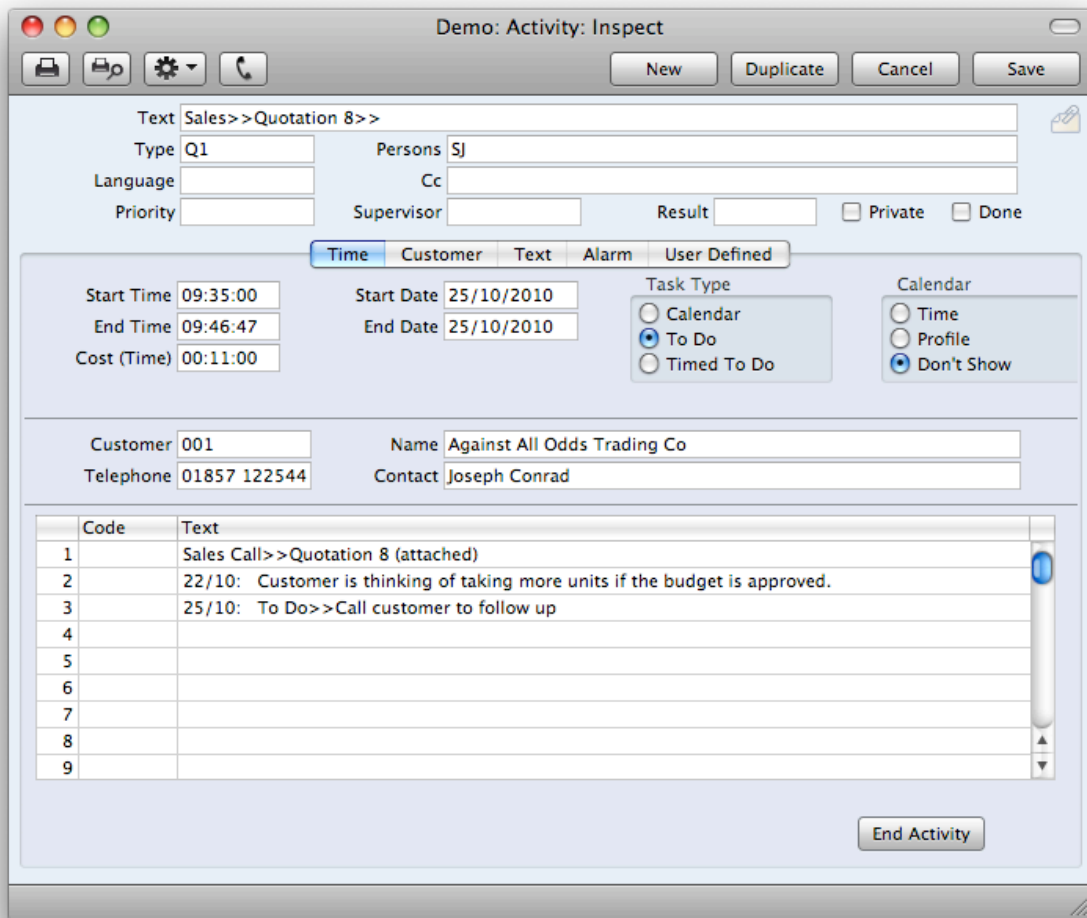
All business events, appointments and tasks can be recorded as Activities. Through the careful use of Activity Types and Classes the Activity register can become a valuable source of information recording many different types of customer and other business related operations. Both past and future events can be recorded, so the register can be used as an efficient diary management tool.

Entering an Activity

Activities can be entered in many ways, here are some examples —

1. Having the Calendar, or Task Manager open on screen, click the button “New Activity” at the top of the window.
2. When working with Letters, Quotations or Mails, select ‘Create Activity’ from the Operations menu of the record window to create an Activity relevant to the record you are working with. The Task Type of the new Activity will be To Do, and the Symbol will be Other. The Start Date and Start Time of the new record will vary, depending on the register from which it was created. The Activity Type used is defined in the Activity Types, Subsystems setting.
3. Activities can also be created from Customer records using the ‘Create Activity’ Operations menu function. In these cases, the new Activity will not be given a default Activity Type.
4. When working with Customer Letters, Activities can be created when records are approved and saved. This is controlled using the Activity Types, Subsystems setting. Such Activities are created and saved, but are not automatically opened for checking or modification.
5. A new Activity can be created automatically from an old one when a Result is entered and it is saved and marked as Done. This depends on the Activity Type/Result combination and is controlled using the Activity Consequences setting. Such Activities are created and saved, but are not automatically opened for checking or modification.

All Activities created from other records, will be linked to the originating record through the Attachments facility. This allows you to open the originating record quickly and easily when reviewing the Activity, or to open the Activity from the originating record.



The screenshot shows a software window titled "Demo: Activity: Inspect". At the top, there are standard window controls and buttons for "New", "Duplicate", "Cancel", and "Save". Below this is a form with several fields: "Text" (Sales>>Quotation 8>>), "Type" (Q1), "Persons" (SJ), "Language", "Cc", "Priority", "Supervisor", "Result", "Private" (checkbox), and "Done" (checkbox). A tabbed interface below has tabs for "Time", "Customer", "Text", "Alarm", and "User Defined", with "Time" selected. The "Time" tab contains fields for "Start Time" (09:35:00), "End Time" (09:46:47), "Cost (Time)" (00:11:00), "Start Date" (25/10/2010), "End Date" (25/10/2010), "Task Type" (radio buttons for Calendar, To Do, Timed To Do), and "Calendar" (radio buttons for Time, Profile, Don't Show). Below this are fields for "Customer" (001), "Telephone" (01857 122544), "Name" (Against All Odds Trading Co), and "Contact" (Joseph Conrad). At the bottom is a table with columns "Code" and "Text":

Code	Text
1	Sales Call>>Quotation 8 (attached)
2	22/10: Customer is thinking of taking more units if the budget is approved.
3	25/10: To Do>>Call customer to follow up
4	
5	
6	
7	
8	
9	

An "End Activity" button is located at the bottom right of the window.

Task Type Use these options to specify the main purpose of the Activity:

Calendar Choose this option if the Activity is to appear in the Calendar and in the Employee Time Statistics report.

To Do Check this box if you would like this Activity to be shown in the Task Manager. Usually this will be because the purpose of the Activity is to schedule a single task, such as a telephone call.

Timed To Do Choose this option if the Activity is to appear in the right-hand panel of the Day Planner. In all cases, if the Calendar option to the right is Time or Profile, the Activity must have both Start and End Times before it can be saved. The Calendar option has no other effect if the Task Type is To Do or Timed To Do.

Calendar These options are used to control how the Activity is shown in the Calendar. These options can even be changed after the Activity has been marked as Done and saved. Usually these options apply only to Activities whose Task Type (above) is Calendar.

Time This option should be chosen in an Activity that represents actual time spent in carrying out a task.

Profile This option can be used to book future time in the Calendar.

Don't Show Use this option if you don't want the Activity to be shown in the Calendar. It will still appear in the Personal Calendar report. (Button 'Report' in your calendar)

In all cases, if the Calendar option to the right is Time or Profile, the Activity must have both Start and End Times before it can be saved. The Calendar option has no other effect if the Task Type is To Do or Timed To Do.

It can be difficult to return to a Don't Show Activity after it has been saved, because it does not appear in the Calendar. You can drill down to it from the Personal Calendar report, or you can use the 'Filter' card of the Task Manager. Choosing the correct Task Type option here will cause all Calendar Activities to be listed, even those marked as Don't Show.

If an Activity Type that belongs to an Activity Class is specified, the chosen Calendar option will change to that set in the Activity Class. You can choose another Calendar option in a particular Activity, but take care to note that another option may be selected if you then change the Activity Type.

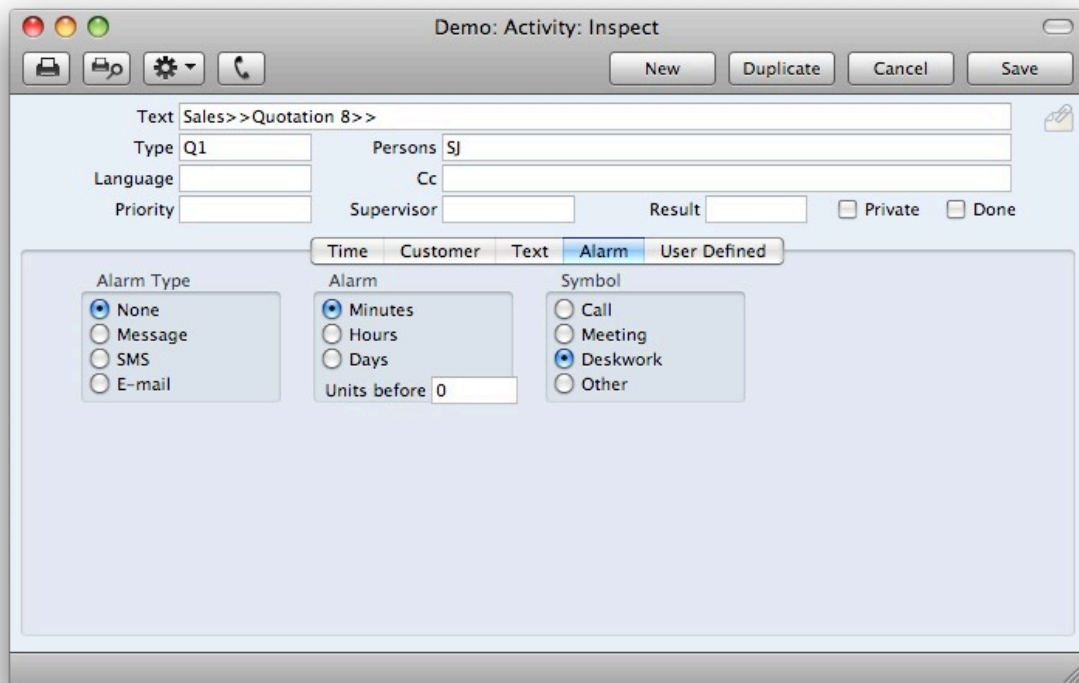
Viewing Activities

Activities can be seen in many ways, here are some examples:

1. Task Manager, which can be opened from Master Control window
2. Calendar, which can be opened from Master Control window and which has many different views – Overview, Month, Week and Day
3. Activities register in System module
4. Many different reports including customer status report.

Alarms on Activities

In addition to just registering your calls or meetings on Activities and checking up on them in the Customer Status report or Calendar, you can go one step further and let CRM by HansaWorld remind you about important tasks by giving you an Alarm.



Alarms can be used to notify yourself, management or other staff about events, meetings and other activities where some action needs to be taken.

The purpose of Alarms is to support business processes by enabling interaction between the users and the system. Alarms can increase efficiency by reducing missed opportunities and improving customer service.

You can choose between three types of Alarms while entering an Activity:

Message With this option you can set the reminder message to pop up on the screen of the person specified in the activity at the chosen date and time. This option is useful for tasks that need to be reacted to right away. The activity with all details can be opened from the message directly

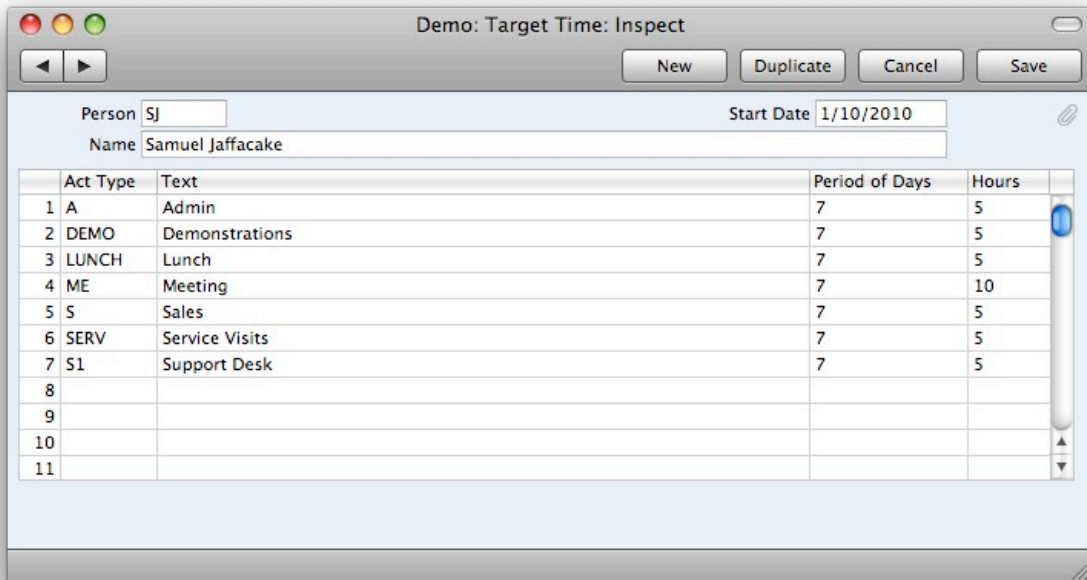
SMS With this option an SMS will be sent to the responsible person. Messages of this kind can be received anywhere any time and the person does not have to be at their desk.

E-mail Alternatively the alarm can be sent as an e-mail to the mailbox of the responsible person. The activity with all details will be attached to the email.

The Target Time Setting

Profile Activities have two purposes: they enable the booking of future time, and they allow this booked time to be compared with the time actually taken to complete the task in question.

Usually, Profile Activities will be used by the employees themselves to book future time, while the Target Time setting will be used by managers to set targets for the amount of time their employees are to spend on work of each Activity Type. The sales person will create Profile Activities for each future sales appointment and Time Activities once those appointments have been fulfilled. The Employee Time Statistics report can then be used to compare Target Time with Profile Activities, Target Time with Time Activities, or Profile Activities with Time Activities. An Activity must have a Task Type of Calendar to be included in this report.



The screenshot shows a window titled "Demo: Target Time: Inspect" with a toolbar containing "New", "Duplicate", "Cancel", and "Save" buttons. Below the toolbar are input fields for "Person" (SJ), "Name" (Samuel Jaffacake), and "Start Date" (1/10/2010). The main area contains a table with the following data:

Act Type	Text	Period of Days	Hours
1 A	Admin	7	5
2 DEMO	Demonstrations	7	5
3 LUNCH	Lunch	7	5
4 ME	Meeting	7	10
5 S	Sales	7	5
6 SERV	Service Visits	7	5
7 S1	Support Desk	7	5
8			
9			
10			
11			

Start Date Specify here the date when the Target Time record is to take effect. It will remain in effect until a new Target Time record with a later Start Date is entered. Only one record for each Person/Date combination can be entered.



Grid Area Use the grid area of the screen to specify the number of hours that it is intended that the Person will spend carrying out work of each Activity Type.

Period of Days, Hours The Period of Days is the period covered by the Target Time row, while Hours is the number of hours during that period to be spent carrying out work belonging to the Activity Type.

For example, if an employee is to spend eight hours per week working on administration, enter “7” as the Period of Days and “8” in the Hours field. If the Period of Days is “1”, the target will be eight hours per day.

Both these fields must contain an entry in a particular row, otherwise the row will be ignored by the Employee Time Statistics report.

It is recommended that you use seven or a multiple of seven as the Period of Days. This will ensure that Employee Time Statistics report produces accurate results taking weekends into account.

As always with Activities, a consistent and planned approach to the Calendar options (Time, Profile and Don't Show) is recommended. This process can be helped by attaching each Activity Type to an Activity

Class in which the correct option has been selected. This will mean that Activities with a particular Type will always have the same Calendar option selected by default, reducing the chances of error (i.e. ensuring they will be taken into account correctly by the various reports).

At the end of the week, an Employee Time Statistics report can be produced. This report in the Contacts module can compare the target time recorded in the Target Time register either with actual time recorded using Time Activities or with planned time recorded using Profile Activities.

INTRODUCTION TO THE ITEM REGISTER

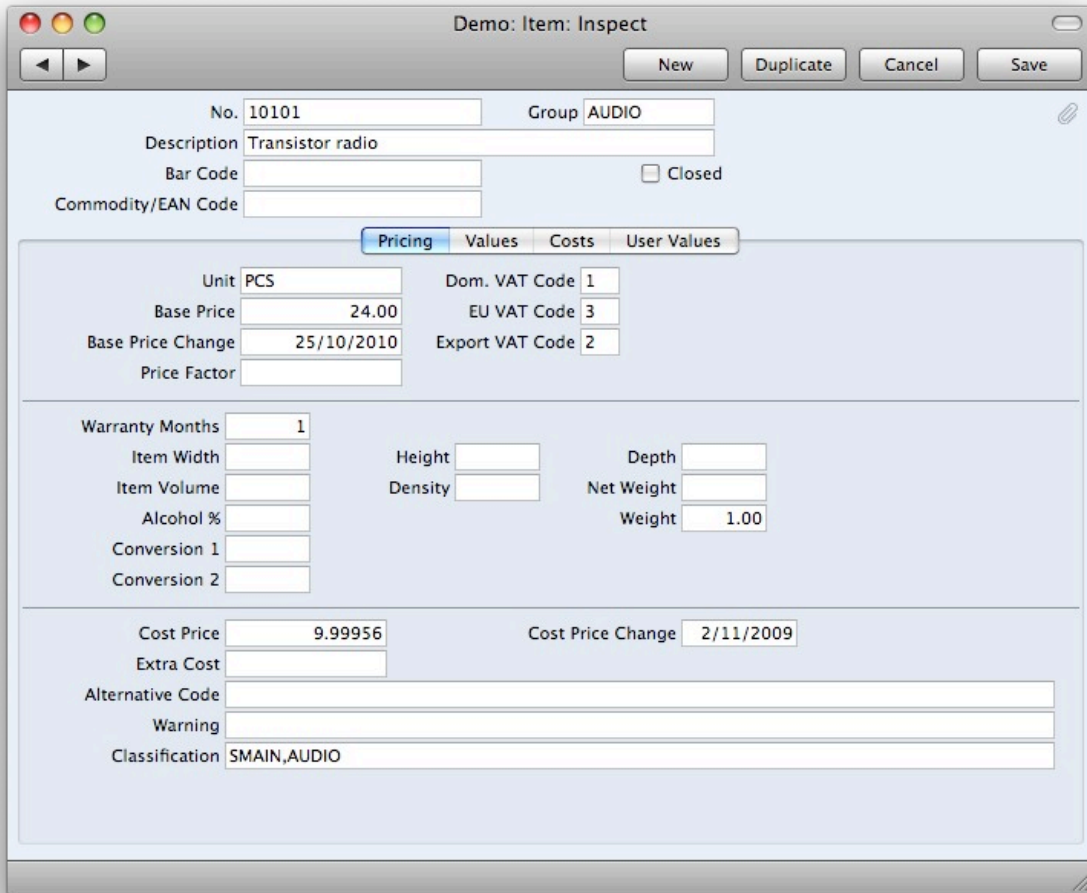
In the Item register you store information about the products and services that you sell. If you also define Item Groups you can improve the reporting capabilities of the program. The Item register is accessible from the Quotations.

To open the Item register, use the [Select Module] button in the Master Control panel to enter the Contact module and click the [Items] button in the Master Control panel.

Entering an Item

To enter a new Item, click [New] or use the **⌘-N** keyboard shortcut. Alternatively, highlight an Item similar to the one you want to enter and click [Duplicate].

The 'Item: New' window is shown, empty if you clicked [New] or containing a duplicate of the highlighted Item.



The screenshot shows a window titled "Demo: Item: Inspect" with a standard macOS-style title bar. At the top right are buttons for "New", "Duplicate", "Cancel", and "Save". The main area is divided into several sections:

- Header Section:** Contains fields for "No." (10101), "Group" (AUDIO), "Description" (Transistor radio), "Bar Code", "Commodity/EAN Code", and a "Closed" checkbox.
- Navigation Tabs:** A set of tabs labeled "Pricing", "Values", "Costs", and "User Values". The "Pricing" tab is currently selected.
- Pricing Section:** Includes fields for "Unit" (PCS), "Base Price" (24.00), "Base Price Change" (25/10/2010), "Price Factor", "Dom. VAT Code" (1), "EU VAT Code" (3), and "Export VAT Code" (2).
- Physical Attributes Section:** Includes fields for "Warranty Months" (1), "Item Width", "Item Volume", "Alcohol %", "Conversion 1", "Conversion 2", "Height", "Density", "Depth", "Net Weight", and "Weight" (1.00).
- Costs Section:** Includes fields for "Cost Price" (9.99956), "Extra Cost", "Cost Price Change" (2/11/2009), "Alternative Code", "Warning", and "Classification" (SMAIN,AUDIO).

Since the amount of information stored about each Item will not fit on a single screen, the Item window has been divided into different cards. By clicking the named tabs you can navigate between the cards. The Item header is always visible, as a reminder of the Item you are working with.



No. Enter the unique identification code you are assigning to this Item. This is the means by which you will identify the Item when including it on Quotations.

Description Enter the name or a short description of the Item.

Group Enter the Item Group to which this Item belongs. Item Groups enable you to classify similar Items together. All Items of the same Group can use the same default accounts. Each Item can belong to one Item Group.

Classification Enter here the Classification to which this Item is to belong. Items can have more than one Classification: enter as many Classifications as necessary, separated by commas

Unit Specify here the quantity to which the Base Price (below) refers. In the majority of cases, this will be a single item, but otherwise it might be a pair or box, or in case of services, an hour or day, etc.

Base Price Enter the normal sales price for the Item here. This price should always be in your home Currency. The price refers to one unit.

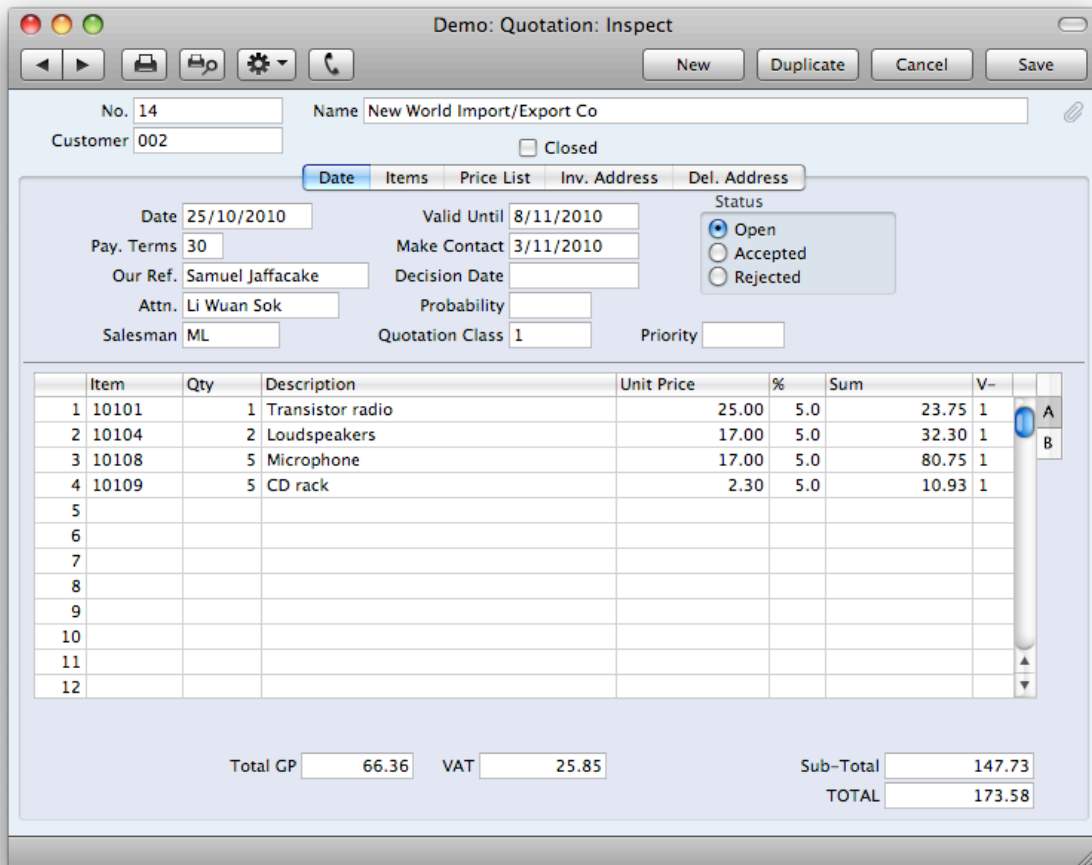
Closed Check this box if the Item is no longer to be used.

Cost Price The Cost Price of the Item is used in calculating the Gross Profit (Base Price less Cost Price).

Click the tabs and go through all the fields on the Item record. You can enter a lot of information from dimensions and unit conversion to stock levels and serial number tracking. You can find a detailed description of all the fields on www.hansamanuals.com

ENTERING A NEW QUOTATION

Click the [Quotations] button in the Master Control panel of the Contacts module. The “Quotations: Browse” window is opened, showing Quotations already entered. To enter a new Quotation, click [New].



The screenshot shows a software window titled "Demo: Quotation: Inspect". At the top, there are navigation icons and buttons for "New", "Duplicate", "Cancel", and "Save". The form contains the following fields:

- No. 14
- Customer 002
- Name New World Import/Export Co
- Closed
- Date 25/10/2010
- Valid Until 8/11/2010
- Pay. Terms 30
- Make Contact 3/11/2010
- Our Ref. Samuel Jaffacake
- Decision Date
- Attn. Li Wuan Sok
- Probability
- Salesman ML
- Quotation Class 1
- Priority
- Status: Open, Accepted, Rejected

Below the form is a table with the following data:

Item	Qty	Description	Unit Price	%	Sum	V-	
1	10101	1 Transistor radio		25.00	5.0	23.75	1
2	10104	2 Loudspeakers		17.00	5.0	32.30	1
3	10108	5 Microphone		17.00	5.0	80.75	1
4	10109	5 CD rack		2.30	5.0	10.93	1
5							
6							
7							
8							
9							
10							
11							
12							

At the bottom of the window, there are summary fields:

- Total GP 66.36
- VAT 25.85
- Sub-Total 147.73
- TOTAL 173.58

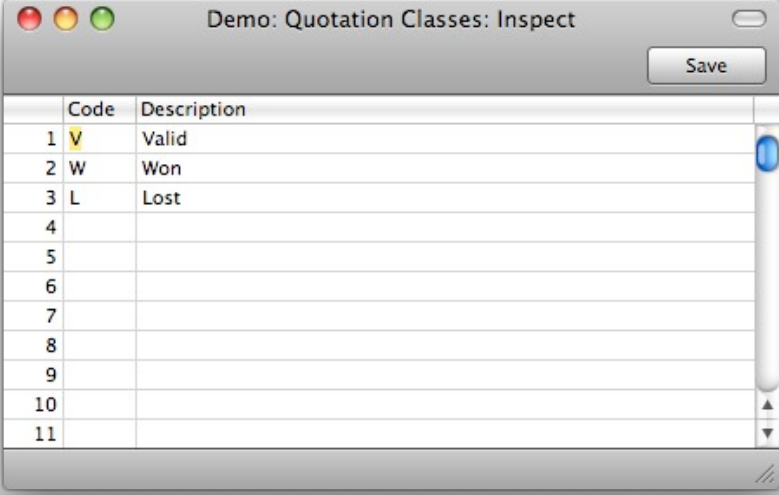
CRM by HansaWorld provides several shortcuts to simplify your work when entering Quotations. You can for example bring a date into a date field using the “Paste Special” function. You can also use this function to simplify the entering of Item Numbers, Customer Numbers, Quotation Classes etc.

You can also create a Quotation by dragging a Customer from the “Customers: Browse” window to the “Quotations: Browse” window. In this case, a new Quotation is opened complete with full Customer information. When selecting the customer, the details like Payment terms, special price list this customer is on, and Address are automatically filled in. These details can later be changed.

You can also specify dates in my quotation that will later on facilitate with pipeline management. On the Date flip, you enter the quotations valid until date, the make contact date (when you will want to contact the customer again) and the decision date. These dates can later be used in the Quotation Journal and Quotation Stock reports to find more information about your quotations pipeline.

A Quotation class allows you to distinguish between different types, or statuses of quotes.

Quotation classes can also be used as a filter in reports.



The screenshot shows a window titled "Demo: Quotation Classes: Inspect" with a "Save" button in the top right corner. The window contains a table with two columns: "Code" and "Description". The table has 11 rows, with the first three rows containing data and the remaining eight rows being empty. The first row has a yellow highlight on the "Code" cell.

	Code	Description
1	V	Valid
2	W	Won
3	L	Lost
4		
5		
6		
7		
8		
9		
10		
11		

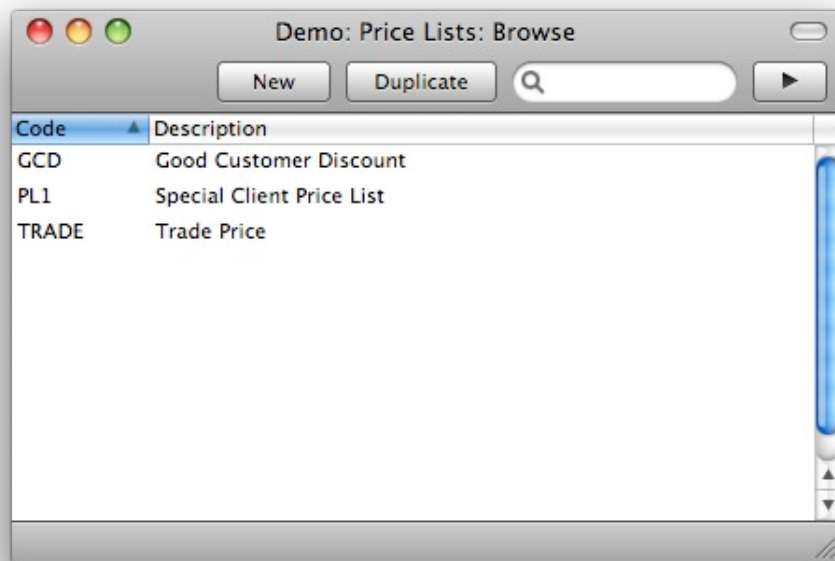
After filling in the customer details on the quotation, you specify the items that the customer wants to buy. You can do that using the simple drag and drop feature and many extra functions are available, such as custom on screen messages for specific items.

When the quotation is done, it is easy to send it to the customer using the Create E-mail function from the Functions menu.

PRICING AND DISCOUNTS

Pricing and Price Lists

When you enter a new item in the Items Register, you also give it a price. This should be the standard retail price for the Item. In the settings of the Contact module, you can also create Price Lists.




Enter a Code and Name for the Price List. Choose whether the Prices in the Price List will include or exclude VAT. Click the Save button or use Shift-Enter to save. You can have several different Prices for each Item. Enter each Price as a separate record in the Prices setting, one Price for each Item for each Price List.

To assign a Price List to a customer, simply go to the Customer card and choose the correct price list in the Price List field on the Pricing flip.

Discounts

To create a discount you simply create a new price for an item in the Prices setting and assign this price to a new price list. This Price List can be made to replace a previous one or to be valid between specified dates.

Demo: Price List: Inspect

Code Description 

Period -

Replace

VAT
 Exclusive
 Inclusive

Row	Type	Item Group	V-Cd
1	Item Group	AUDIO	
2			
3			
4			
5			
6			
7			

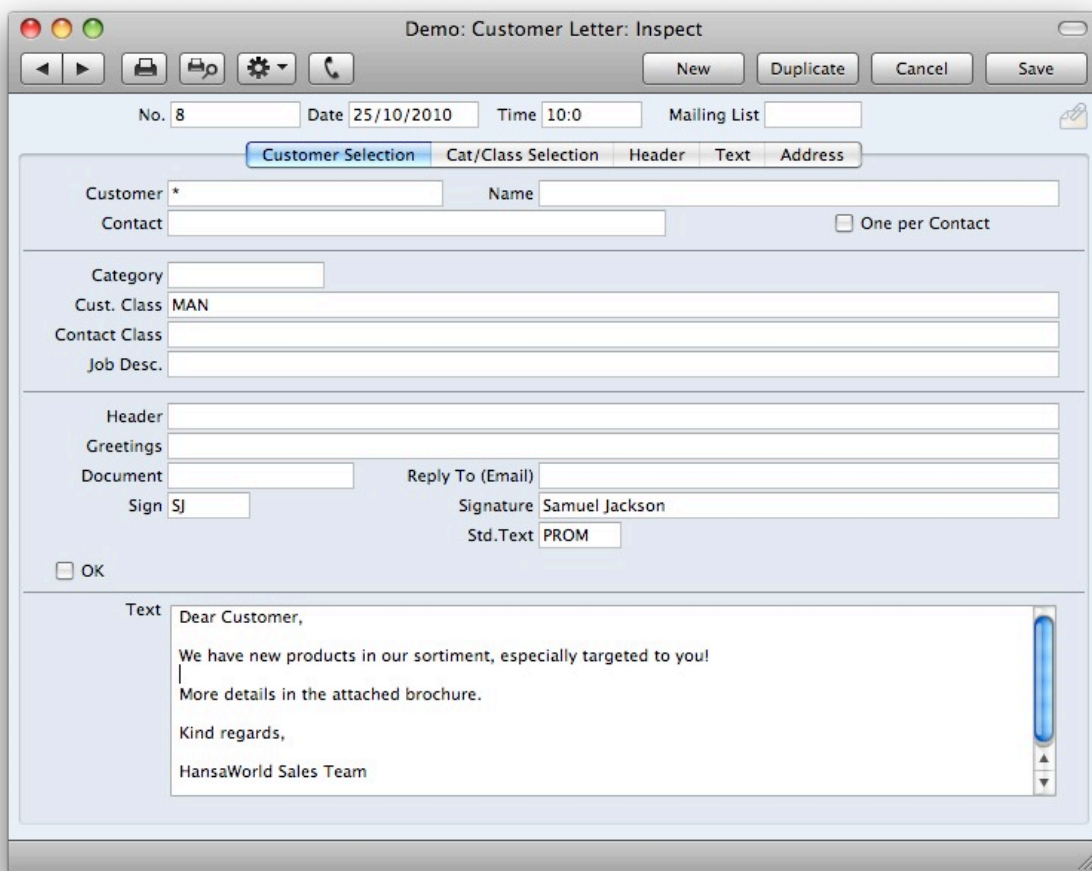
TARGETED MARKETING CAMPAIGNS, CROSS AND UP-SELLING

CRM by HansaWorld allows you to create targeted marketing campaigns with a combination of the tools available in the system, as well as to cross and up-sell.

Targeted Marketing:

You can send targeted marketing mailshots to your customers. Targeted in that case means that you can choose who of your customers should get a certain information, brochure or offering. This can be specified on the Letter directly, by filling in a Classification into the Cust. Class field.

By attaching a file to the letter, you can send price list, brochures or invitations and more to your customers.



Demo: Customer Letter: Inspect

No. 8 Date 25/10/2010 Time 10:0 Mailing List

Customer Selection Cat/Class Selection Header Text Address

Customer * Name

Contact One per Contact

Category

Cust. Class MAN

Contact Class

Job Desc.

Header

Greetings

Document

Sign SJ

Reply To (Email)

Signature Samuel Jackson

Std.Text PROM

OK

Text

Dear Customer,

We have new products in our assortment, especially targeted to you!

More details in the attached brochure.

Kind regards,

HansaWorld Sales Team

The above letter will only go to customers in the manufacturing industry. In this way they can receive brochures, offers and event invitations regarding this specific industry only.

An alternative example would be to send offers or event invitations to customers within a certain region. Or a follow up letter, of leads that have attended a certain seminar or exhibition. The classifications can be freely defined and used according to your specific needs.

Cross and Up-selling campaigns

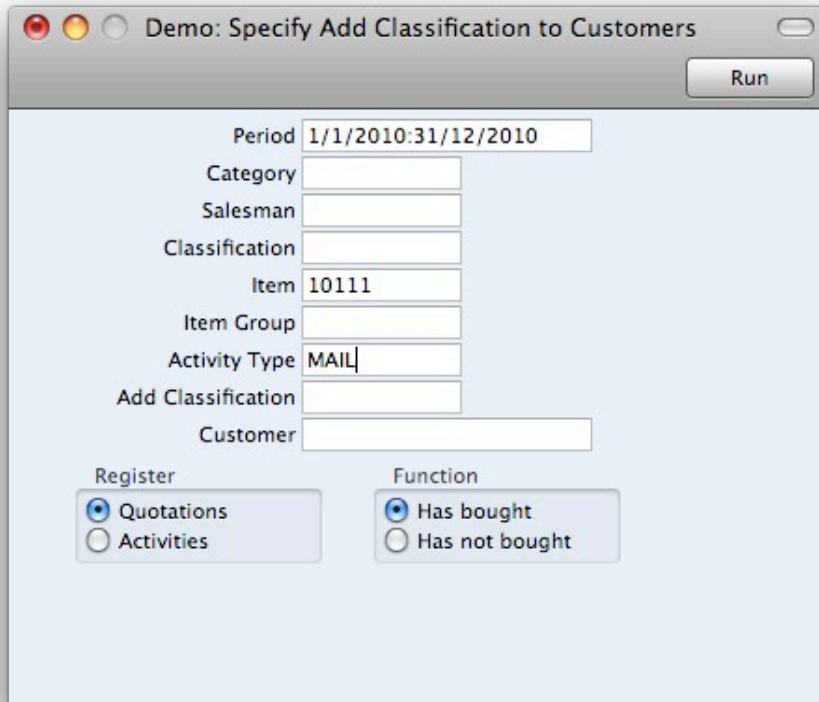
Most companies nowadays want to do cross and up-selling campaigns to their customers. This is very easy to do in CRM by HansaWorld, and will only take a few minutes. The logical workflow is the following:

1. Determine all customers who have bought a specific item:

This is done by running the 'Who has bought, not bought' report. The only thing that is mandatory for this to work is to specify the item, which your customers have bought. More details how to run this report please find above in the chapter 'Reports'. Run this report to screen to see a list of all customers who fit to these criteria.

2. Compile a list of the customers who should form part of your campaign

CRM by HansaWorld has solved that by being able to run a maintenance routine, which tags the customers with a certain classification. The maintenance is 'Add classification to customers' in the Contacts module.



Demo: Specify Add Classification to Customers

Run

Period 1/1/2010:31/12/2010

Category

Salesman

Classification

Item 10111

Item Group

Activity Type MAIL

Add Classification

Customer

Register

Quotations

Activities

Function

Has bought

Has not bought

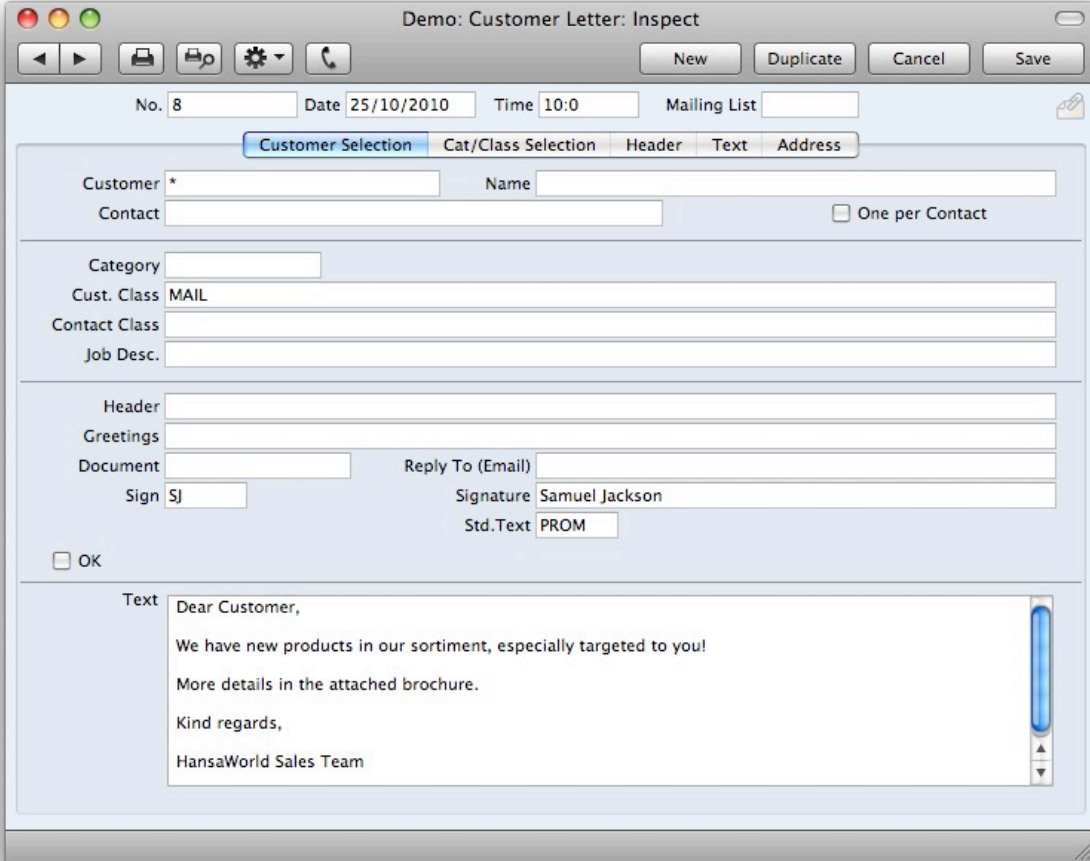
In this window you should specify exactly the same criteria as in the Who has bought/Not bought report. Specify your item, and run it for 'has bought', for the example of Cross-selling. The Register this should be based on is the Quotations register, so choose it in the Radio button set at the bottom left of the screen.

Also mandatory to specify is the classification you want to have added to your customers. To have the campaign as efficient as possible, it is recommended to use one which is in the system, but not yet used earlier.

Running this maintenance, will add the specified classification to all customer who have bought a certain item.

3. Create a letter to them, with relevant text and brochures/price lists or other files attached

After classifying our customers, who have bought a certain item, we can create a letter to this group of customer. The procedure is exactly the same as written in the chapter about Sending Letters. Attach any relevant files or brochures you want to send.



Demo: Customer Letter: Inspect

No. 8 Date 25/10/2010 Time 10:0 Mailing List

Customer Selection Cat/Class Selection Header Text Address

Customer * Name

Contact One per Contact

Category

Cust. Class MAIL

Contact Class

Job Desc.

Header

Greetings

Document

Sign SJ

Reply To (Email)

Signature Samuel Jackson

Std.Text PROM

OK

Text

Dear Customer,

We have new products in our sortiment, especially targeted to you!

More details in the attached brochure.

Kind regards,

HansaWorld Sales Team

4. Send it to the customer's email addresses.

Sending the customer letter off, works exactly the same as written in the chapter about Sending Letters. Go to Operations>>Send Letter.

If wanted, you can create an activity from the customer letter to follow up on the campaign.

You have now successfully made a cross selling campaign. In CRM by HansaWorld, all contacts who have bought the item are now classified with a specific classification.

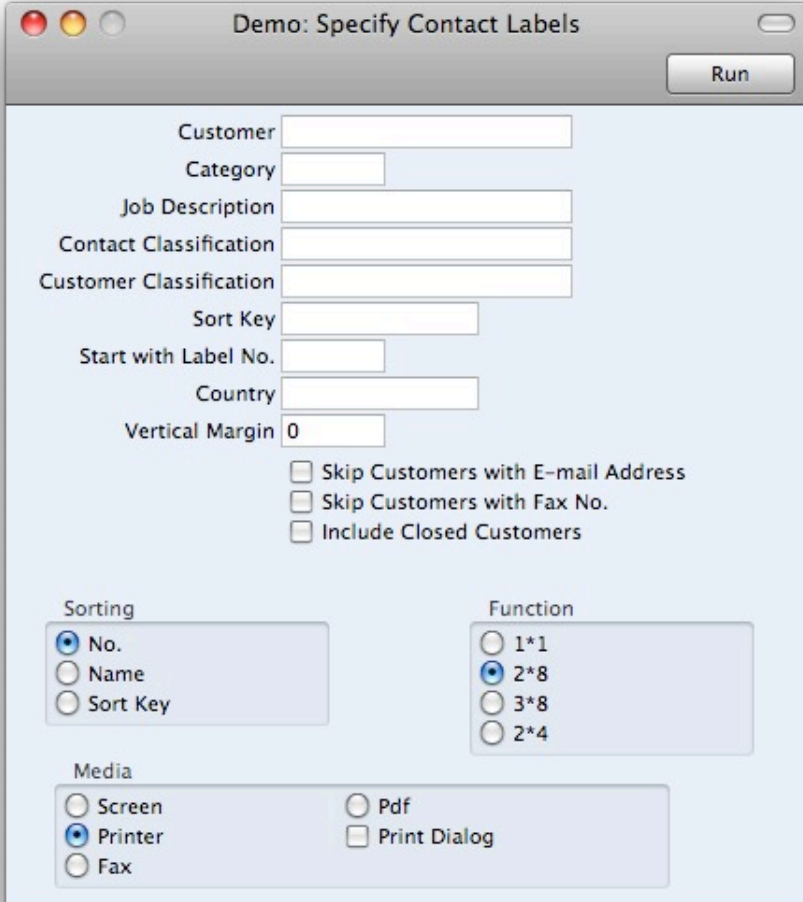
Depending on your strategic needs, and situation, you can either leave the classification on the Contact card, to mark them permanently that they have been part of the campaign, or you can take the classification away again.

In order to remove the classification from your customers, there is a similar maintenance routine, called 'Remove classification'. Fill in the classification you want removed and press 'Run'. The classification will now be removed.

DOCUMENTS

Contact Labels

This document prints name and address labels to Customers. The Invoice Address on the 'Contact' card of each Customer record is used. You can use this function to print Addresses of contact who You have not reached by fax or e-mail and send them Customer Letter by regular mail.



Customer

Category

Job Description

Contact Classification

Customer Classification

Sort Key

Start with Label No.

Country

Vertical Margin

Skip Customers with E-mail Address

Skip Customers with Fax No.

Include Closed Customers

Sorting

No.

Name

Sort Key

Function

1*1

2*8

3*8

2*4

Media

Screen

Printer

Fax

Pdf

Print Dialog

Run

Customer Letter

This document prints letters to Customers. It first searches for records in the Customer Letter register matching the search criteria entered in the 'Specify Customer Letter Documents' window. For each Customer Letter found, it then prints the letter text entered on the 'Text' card to the recipients as determined on the 'Customer' and 'Cat.' cards.

USEFUL REPORTS

Activities, Customers/Suppliers

This report lists Activities of all Task Types, sorted by Customer. The Private Activities of the Person producing the report are marked with an asterisk (*). The Private Activities of other users are not shown in the report.

Activities, Persons

This report lists Activities of all Task Types, sorted by Person.

Customer List

This is the main report in the Contacts module. This report lists Contacts in the Contact Person register, together with contact details (telephone, fax and mobile numbers and email address).



Demo: Specify Customer List [Run]

Customer
Category
Salesman
Sales Group
Language
Payment Terms
Classification
Classification Types
Country
New or updated since
Sort Key
Short

Include all Contact Persons
 Check Contact Persons
 Skip Customers with E-mail Address
 Only Customers with same E-mail as other Customer
 Skip Customers with Fax No.
 Count Customers per Classification

Sorting

No.
 Name
 Category
 Sort Key
 Department
 Telephone

Function

Detailed
 Telephone
 Fax
 E-mail

Include

Not Closed
 Closed
 Closed Only

Media

Screen
 Printer
 File
 Clipboard
 Fax
 Pdf
 Html as Attachment
 Excel
 Print Dialog

This report can be run in many different specifications: If you fill in a customer, or range of customers, you will only see the contact details of these specific customers. You can also narrow down your report by Customer category, or classifications. That allows you to get a list of your contacts who are e.g in the manufacturing industry, or in a certain region. If you enter several classifications, you can get a report showing all your contacts in the manufacturing industry, in the southern region.

You can narrow down to see customers with specific payment terms, languages, belonging to a certain salesman etc. And sort them in different ways: by alphabet of Name, or ascending customer number.

Customers without/with Activities

This report is a list of Customers that have or do not have an activity of a certain type during a specified period.

Employee Time Statistics

This report is a list of employees, comparing the planned and actual hours that each one worked during the report period. Depending on the comparison method selected, the numbers of hours are calculated using Activities whose Start Date falls in the report period and Target Time records whose Start Date is most immediately prior to the report period.

Who has bought/not bought

This report lists the Customers that have bought or not bought a specific Item. The information is taken from accepted quotations of the customer.



CRM: Specify Who has bought/not bought

Run

Period 01/10/10:31/10/10

Category

Salesman

Classification

Item

Item Group

Function

Has bought

Has not bought

Media

Screen

Printer

File

Clipboard

Fax

Pdf

Html as Attachment

Excel

Print Dialog

Category Enter a Customer Category here if you would like the report to list the Customers belonging to that Category that have bought or not bought the specified Item.



Salesman Enter a Person's initials to list the Customers with a particular Salesman that have bought or not bought the specified Item.

Classification Enter a Customer Classification here if you would like the report to list the Customers with that Classification that have bought or not bought the specified Item. If you enter a number of Classifications separated by commas, the report will only list those Customers with all the Classifications that you have entered.

Item Specify here the Item that is to be the subject of the report: it will list the Customers that have bought or not bought this Item. The report will be empty if you do not specify an Item.

Item Group Specify here the Item Group that is to be the subject of the report.

Function Choose whether the report is to list Customers that have bought or not bought the specified Item.

EXERCISES

Theory Questions

1. What does the abbreviation CRM stand for?
2. Describe with a few sentences what CRM is.
3. What is a contact in HansaWorld?
4. What is the difference between Activity Types and Activity Classes?
5. Give 3 examples of Activity Types.
6. What is the difference between Classification Types and Classifications?
7. Give 3 examples of Classification Types.
8. How can you check which customer has "got lost" – meaning that for a certain period they have no activities?
9. Where can you use standard texts?
10. How can you set up that when a certain activity is marked as done another activity is created one week ahead in time?
11. Name at least 3 different ways to enter a new activity.
12. How can I immediately update the customer name on all contact persons when a customer's name is changed?

Practical Exercises

Preparation: Download the latest English version of CRM by HansaWorld and import the English test database. Set your own name in Module System >> Settings >> Company Info >> Company Name.

1. Create new activity types for outgoing sales calls and for the result that the customer is on holiday. The result activity type should have a special class for results. Setup the system so that if an outgoing sales call gives the result that the customer is on holiday then a new activity (outgoing sales call) is created for 7 days ahead in time.
2. Create an activity for a sales call where the customer is on holiday, run the customer status report showing the activities. Take a screen dump of the customer status report.
3. Person called Keith Stevens needs to see in customer status report last 30 done activities and 10 last quotations. Do the necessary settings. Select a customer with both open and closed quotations, make a screen dump of the customer status report.
4. You want to send a customer letter to all customers who have bought item Transistor Radio to send out targeted marketing material. Create a Contact Classification TRANS for this purpose. Add the classifications to the customers in question, create a new standard text where you thank the customers for buying the radio. Create the mails and make a screen dump of the Letter list report and a screen dump of the report E-Mail and Conferences >> Email Queue List. Remove the classification TRANS afterwards.
5. Create a target time record for Keith Stevens for a 40 hour week including: Service visits 12 hours, meetings 15 hours and admin 13 hours. Register one week of activities that differ slightly from the target time. Run a report that clearly shows the actual time for the week compared to the target time. Make a screen dump of the report.