Attaché

Attaché ClearView

CRM

User Guide

Publication Number	Publication Date	Product Version
A001064.00	February 2014	Attaché ClearView version 2.50

Attaché Software Australia Pty Ltd
ACN 002 676 511 | ABN 32002676 511
18 Berry Street, North Sydney NSW 2060 Australia
PO Box 1070 North Sydney NSW 2059 Australia
Tel +61 2 9929 8700 Fax +61 2 9925 0481

Attaché Software New Zealand Pty Ltd
Level 6, 48 Greys Avenue, Auckland New Zealand
Tel +64 9 302 9390 Fax +64 9 302 9391

Email: info@attachesoftware.com
Website: www.attachesoftware.com

Contents

Introduction to ClearView CRM

ClearView CRM (Customer Relationship Management) puts customer contact information, sales history and details of all interactions at your fingertips. By focusing on customer buying habits and interactions, CRM helps you improve customer loyalty and increase sales.

Easy to use. CRM uses the familiar ClearView Dashboard interface so it's easy to get up and running - just click on the CRM tab and you're ready to go. All CRM functions are accessed via the various pages using the right-click context menus. As for the dashboard, all gadgets are interactive.

Improve efficiency and productivity. Create notes and tasks so nothing is overlooked or forgotten: e.g. record a customer's delivery preferences; create a reminder to follow up on a back order. Create quotes, orders, invoices, credit notes etc directly from your CRM dashboard. Sort and filter information on-screen and send to other staff, e.g. send details of a customer's monthly sales to the Sales Manager.

Manage your tasks and reminders. On the CRM Home page you can see Notes and Tasks for yourself or the selected Sales Rep, based on the specified Next Date. Overdue items are shown in red. See tasks for This Week, Next Week etc. Future tasks are shown in bold in the calendar; click to see details.

Search for and focus on an individual customer. Search for customers using the Customer Search gadget on the Customer Details page. When you find your customer, click on their Name to focus the information in all gadgets on that customer.

See comprehensive contact history. The Contact History page focuses on the selected customer. Instantly see all notes, tasks, quotes, orders, invoices, credit notes and more. Sort and filter the information to see just what you need, and drill into enquiry screens by clicking on codes and document numbers. This means even the newest staff member can answer queries quickly and accurately.

See comprehensive sales history. Analyse the buying patterns of a customer instantly on the Sales History page. Data is live – as processing continues, the ClearView Data Service formats data for display in the gadgets. Screens can be refreshed (like a web page) to pick up recent changes.

Monitor your sales pipeline. Focus on potential sales on the Opportunity page. See active quotes (and recently accepted or rejected quotes) for the selected Sales Rep or all reps. Expired quotes are highlighted in red. Create, edit or delete quotes, and assign a % probability of success to help forecast sales.

Create new opportunities. On the Marketing page you can create email, telemarketing and direct mail campaigns targeting all or selected customers. Maximise the success of your marketing campaigns by using previous buying patterns, e.g. send a promotional newsletter to customers who have purchased products from a particular group within the past six months.

Create professional communications. Use the in-built HTML Editor to compose emails and letters. Create personalised emails using pre-defined html templates, ensuring fast and professional communications. This helps ensure that staff communicate with customers in a consistent and professional manner.

Extend your ClearView features. If you'd like gadget content and other reports to be tailored to meet your needs, add the ClearView Report Designer. By adding other ClearView modules you'll have even more tools to control and improve your business.

Who Should Read this Guide

This guide is for Attaché Accounts users and consultant who have installed the ClearView Dashboard and CRM modules and wants to learn how to use the CRM module features.

CRM can be used by anyone in the business although features are designed for sales and accounts people. Information exposed by the CRM module includes detailed customer sales and contact information and access to this information as well as the ability to enter orders, quotes and invoices in Attaché is required to use CRM to its full potential.

What is covered in this Guide

This guide discusses how to use the ClearView CRM module. It assumes that you have a good working knowledge of Attaché Customers, Order Entry / Invoicing, Contacts and Quotations modules. It also refers to features of the ClearView Dashboard module. For more information see the ClearView Dashboard User Guide.

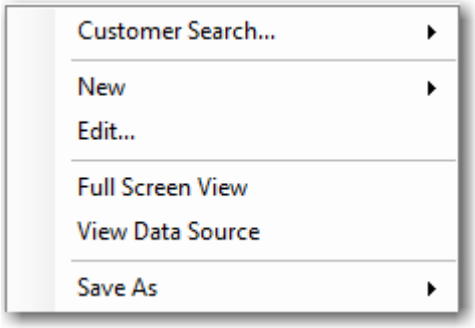
- **Quick Start.** The Quick Start section shows you how to install and setup the CRM module and start it.
- **Using CRM.** In the Using CRM section you will learn how to use the features of the CRM module to select and view information about your customers, track sales opportunities (quotes and leads) and create new opportunities using the marketing tools.
- **Tutorials.** In the Tutorials section there are step by step instructions for performing common tasks using simple examples. Not all features are covered here but there should be enough information to get you up and running quickly.

Conventions and Terminology

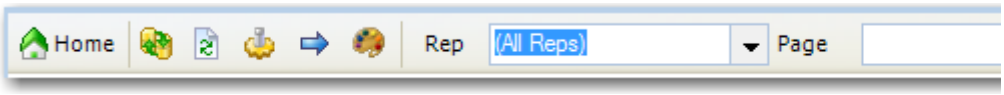
Throughout this guide you will be directed to dashboard pages, context menu items, forms and various other places. You will also be introduced to new terms which will be abbreviated from time to time to improve readability.

This section defines the conventions ad abbreviations that will be used for the remainder.

- **CRM.** Customer Relationship Management
- **Context Menu** This is the menu which appears when you right mouse click on a gadget. The context menu is sensitive to where you click so if a menu item does not appear, try clicking somewhere else in the gadget. Often it only takes a couple of clicks to get your bearings. Most CRM features are available from the context menu. See section Gadget Context Menu for more information.



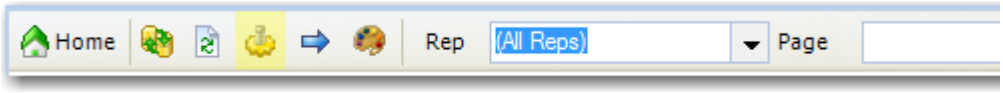
- **Dashboard Toolbar** This is the strip of buttons which appears at the top of the ClearView Dashboard.



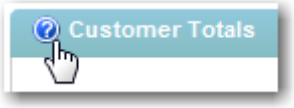
The **Rep** drop down list control is specifically designed to allow you to filter information based on your sales rep code. When you logon this should default to your code. If not, this can be setup in the **ClearView Options**.

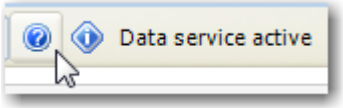
For more information, refer to the **ClearView Dashboard User Guide**.

- **ClearView Options**. The ClearView (Dashboard) Options can be access from the Dashboard Toolbar using the button show below. Many CRM functions (such as linking Sales Rep to a User logon) depend on settings in the options.

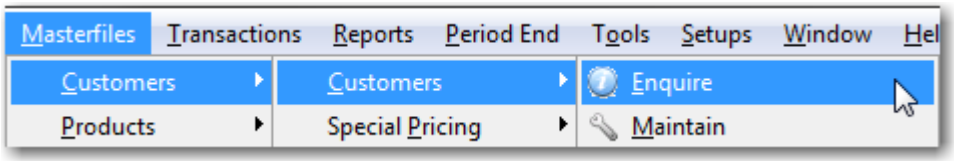


- **On-Line Help** You can get on-line help on a specific gadget by clicking on the help icon to the left of the gadget caption. User Guides for other modules are available in an on-line format by selecting **Help** from the **Dashboard Toolbar**.





- **Attaché Menu** When asked to start a program from a menu, the program will be identified using the format **Menu | Sub-Menu | Program** format. For example, the Attaché Customer Enquiry program would be specified using Masterfiles | Customers | Customers | Enquiry. A similar convention is adopted for context menu items.



- **Report Designer.** Throughout this user guide references are made to the Report Designer module. This is an optional module which allows you to cerate your own reports and gadget content and is available separately. For more information about this module refer to the **ClearView Report Designer User Guide**.

Quick Start

Important: You should have already installed the ClearView and completed the steps in the ClearView Installation Guide and completed the Dashboard Quick Start checklist and the ClearView Getting Started section before you set up and use CRM.

Once you have installed ClearView you will be able to access CRM by selecting the "CRM" link on the dashboard and selecting the Home Page.

- Refer to the Home Page to access your To Do List.
- Many gadgets require a specific customer to be selected. You can search and select a customer using the Customer Search gadget on the Customer Details Page or using the Select Customer context menu.
- Refer to the Customer Details Page to select a customer and view their details including contacts, balances, sales and more.
- Refer to the Contact History Page to view the complete history for the selected customer.
- Refer to the Sales History Page to view a detailed sales history for the selected customer.
- Refer to the Opportunities Page to view and track your current sales opportunities.
- Refer to the Marketing Page to tag contacts and send emails and to access other marketing campaign tools.

Before you use CRM check the following things first.

1. **Licensing.** You should see "CRM" in the Help | About | Modules Installed... program. If you do not see this then contact Attaché to get an updated license.
2. **Attaché Contacts**. CRM uses the Attaché Contacts module. You will need to have this module installed. The latest version can be downloaded from the **Attaché Members Web-Site**.
3. **Dashboard Options.** Sales Rep and Mail Server settings need to be setup via the Dashboard Options which is documented in the **ClearView Dashboard User Guide**.

   Mail Settings are important because you will not be able to send emails unless they are right. Enter the address of your outgoing mail server (eg. "mail.bigpond.com.au"). If in doubt, these should be the same address as your default mail client (eg. Outlook).
4. **CRM Options.** Setup any additional Departments and Contact Types required and check that the Documents Folder setting is appropriate in the CRM Options.
5. **Start CRM.** CRM is accessed from the CRM tab on the ClearView Dashboard. To manually start the Dashboard from Attaché, go to **Masterfiles | ClearView | Business Intelligence | Dashboard**.
6. **Customise Gadgets (Optional).** Use the Properties gadget tool to change the appearance and contents (data source) of standard gadgets. If you are licensed for the ClearView Report Designer you can create your own gadget data sources and reports.

Setups

CRM Options

The CRM Options controls the behaviour of many key features of the CRM module. You can access the CRM Options via the Attaché **Setups | ClearView | Options | CRM Options** menu.

Departments which are used to categorise your contacts for marketing and which are used by Attaché Contacts can be defined in the Contact Departments option group.

Contact Types which are used to categorise notes, tasks and emails can be defined in the Contact Types option group.

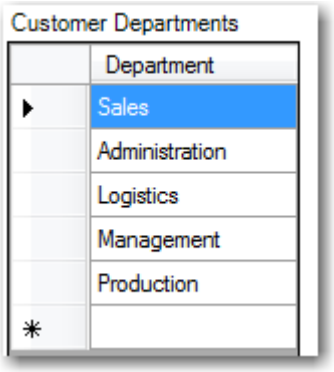
The location of your attachments, emails and other CRM documents can be specified in the File Locations option group.

After making changes on the Options screen, press the **Save** button and then **Close** the form.

Customer Departments

Departments are used to categorise your contacts for marketing and are used by Attaché Contacts in the **Team** field.

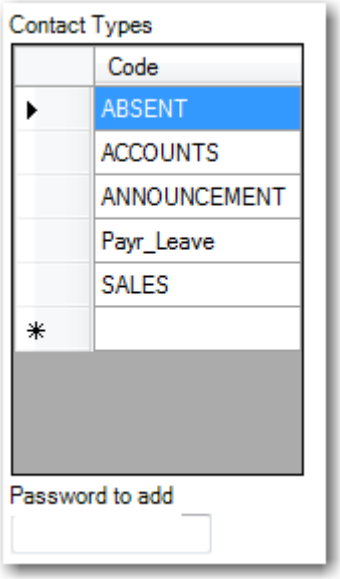
Department You can add a Customer Department, type in the Department name then press ENTER. To delete a Department, click the row to select the record then press DELETE on your keyboard.



Attaché Contacts Team If you want to use the Department tagging features on the Marketing page, each contact should have the Team field (in the Electronic Contact Details Manager) set to the relevant department code.

Contact Types

Contact Types which are used to categorise notes, tasks and emails.



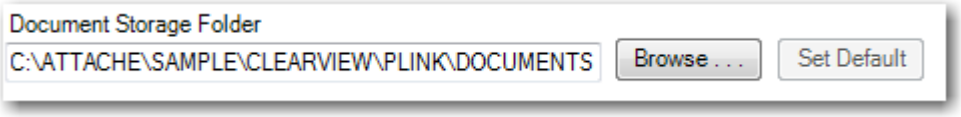
Code You can add a new Contact Type by typing it in the Code field and pressing ENTER. To delete a Contact Type, click the row to select the record then press DELETE on your keyboard.

Password to Add You can control the addition of Contact Types by unauthorised users, using a Password. If anyone tries to add a new Contact Type while entering a task or note, they will be prompted to enter the password.

TIP: You can also add a contact type via the New / Edit Task screen by clicking the plus sign (beside the contact type field).

Document and File Locations

CRM keeps documents such as emails and attachments in the PLINK\DOCUMENTS folder in the Attaché data folder.



Document Storage Folder If you want to store emails, attachments and documents somewhere other than your Attaché company data folder, browse to select the file location.

Important: Changing this location will cause all documents to be moved to the new location. This may take several minutes. You should ensure the new location has enough disk space.

Set Default You can reset the location of the documents folder using the Set Default button.

Dashboard (ClearView) Options

The ClearView or Dashboard Options also controls the behaviour of many key features of the CRM module. You can access the Dashboard Options by selecting the button on the Dashboard Toolbar or via the Attaché **Setups | ClearView | Options | ClearView Options** menu if the dashboard is not currently open.

The Sales Rep for each user can be defined in the **User Settings** tab.

Mail Server settings which are used when sending emails can be specified in the **Mail Settings** tab.

Contact Types which are used to categorise notes, tasks and emails can be defined in the **Other Settings** tab.

The **Advanced Settings** tab contains optional settings which may be used to tweak some beahaviour of the dashboard.

The **System Information** tab contains useful information about the modules, performance, program and data files.

After making changes on the Options screen, press the **Save** button and then **Close** the form.

As these options are also applicable to the Dashboard module, they are documented in the **ClearView Dashboard User Guide**.

Using CRM

Before using the CRM you should have read and followed the instructions in the Quick Start section of the guide. This includes setting options which control the behaviour of many CRM features.

Once you have installed and configured ClearView CRM you can access the main features from the pages in the **CRM** dashboard.

The Home Page contains your To Do List. If you see tasks for other people you will need to personalise it to only display items assigned to your Sales Rep code. See the Personalising CRM section for more information.

Many gadgets require a specific customer to be selected. You can search and select a customer using the Customer Search gadget on the Customer Details Page or using the Select Customer context menu.

The Customer Details Page allows you to select a customer and view their details including contacts, balances, sales and more.

The Contact History Page allows you to view the complete history for the selected customer.

The Sales History Page allows you to view a detailed sales history for the selected customer.

The Opportunities Page allows you to view and track your current sales opportunities.

The Marketing Page allows you to tag contacts and send emails and to access other marketing campaign tools.

The My CRM Page allows you to create and add your own gadgets. Note: To create a new gadget you will need to install the Report Designer module.

You should read the Tutorials section. This covers some of the more frequent tasks that you may want to perform with CRM such as creating notes, tasks and sending emails.

Starting CRM

CRM requires the ClearView Dashboard to be open. If you need to manually start the Clearview Dashboard, select **Masterfiles | ClearView | Business Intelligence | Dashboard**.

*TIP: Attaché can start the dashboard every time you logon using the **Launch ClearView on Open** setting in the **Setups | Company | options | User Options**.*

All CRM features are accessed via the **CRM** tab and its various pages. Select the CRM tab then select the required page. Each page has several Gadgets.

You can also select the relevant Page via the drop-down selection in the Dashboard Toolbar.

Refer to the **ClearView Dashboard User Guide** for information about the following:

- Dashboard appearance (screen resolution, colour and theme)
- Dashboard Toolbar
- Gadget Toolbar
- Displaying data using the Data Service.

Personalising CRM

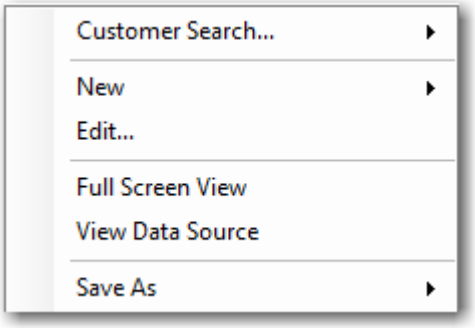
Many CRM gadgets display information differently depending on who is logged in. To see personalised data an Attaché Sales Rep must to be assigned to each user in the Dashboard Options.

When you start the dashboard, your Sales Rep code is recognised and displayed in the **Rep** field on the Dashboard Toolbar.

If authorised (via Dashboard Options), you can switch between Reps via the ClearView Toolbar.

Gadget Context Menu

The context menu appears when you use the right mouse button within the body or header of a gadget. The menu items available depend on the gadget and where the mouse-click occurs within the gadget.



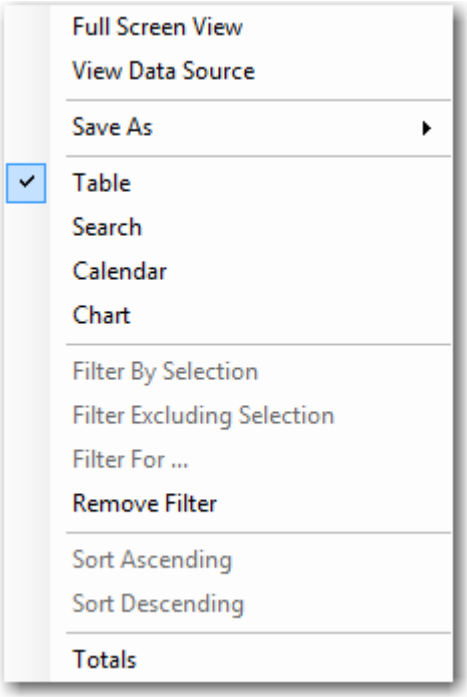
CRM uses the Dashboard interface, so you'll see the standard context menu options that allow you to move into Full Screen View, change to a Table, Search, Calendar or Chart, Filter and Sort the data, add Totals and more.

CRM functions are driven by specialised right-click context menus, which are dependent upon the page and the gadget where the right-click happens.

CRM context menu options are also discussed in the Gadget Content and Features section.

Dashboard Menu

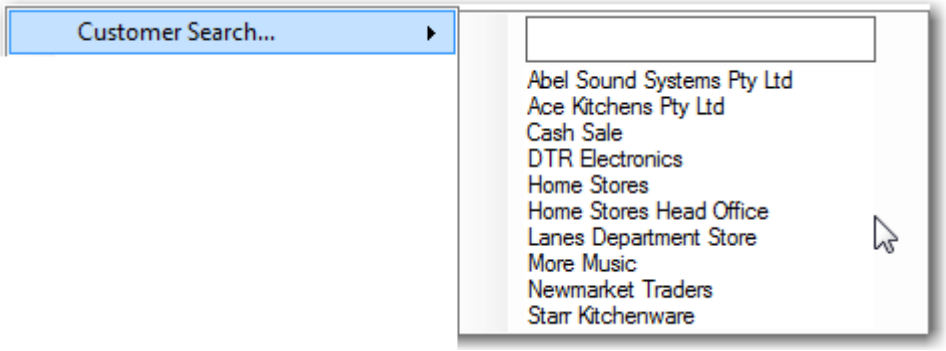
CRM uses the Dashboard interface, so you'll see the standard context menu options that allow you to move into Full Screen View, change to a Table, Search, Calendar or Chart, Filter and Sort the data, add Totals and more. For more information refer to the **ClearView Dashboard User Guide**.



Select Customer Menu

Many of the gadgets are filtered for a specific customer so you will need to select a customer to see information in the gadget. Affected gadgets are easily identified because they will be blank. To select a

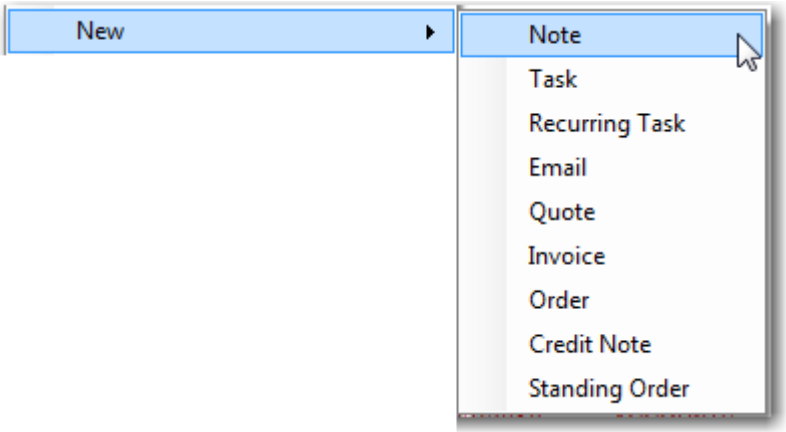
customer, press the right mouse button and select **Customer Search…** and the first few characters of the customer name.



You can also select a customer using the Customer Search gadget on the Customer Details page.

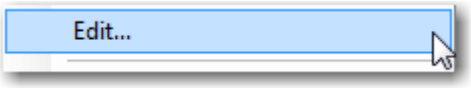
New Item Menu

The New Item menu allows you to add a new note, task, recurring task, email or Attaché document for a selected customer. Select a customer and then press the right mouse button and select **New**. Items added will appear on the customers Contact History page.



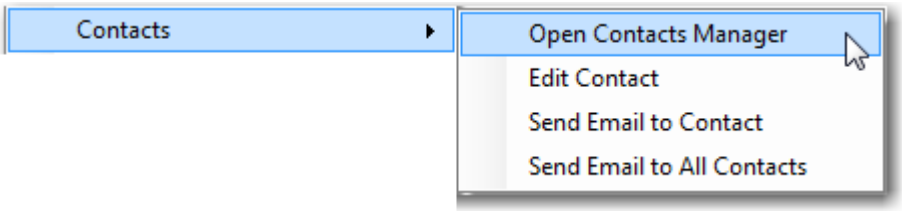
Edit Item Menu

The Edit Item menu allows you to edit an existing note, task, recurring task, email or Attaché document for a selected customer. Select a customer and then press the right mouse button and select **Edit**. Changes to items will appear on the customers Contact History page.



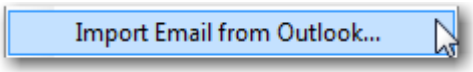
Attaché Contacts Menu

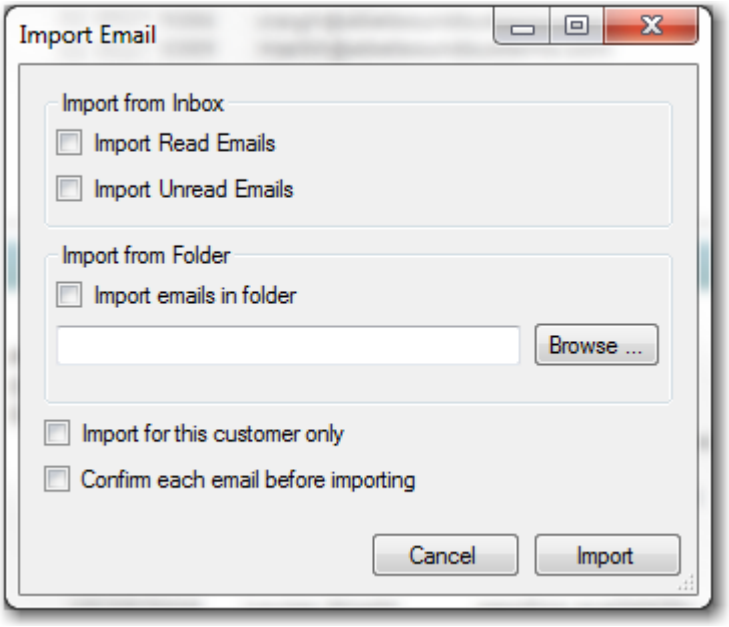
CRM integrates with Attaché Contacts. The Attaché Contacts menu allows you to edit a contact by right clicking on the contact in the Contact List on the Customer Details page and selecting **Contacts | Edit Contact**. You can also send an email directly to a contact using **Send Email to Contact**.



Import Email Menu

CRM can import emails from your Outlook Inbox using the **Import Email from Outlook…** menu. This menu is available from the Contact History gadget on the Contact History page.





Import From Inbox Select **Import Read Emails** or **Import Unread Emails**. Generally only read emails should be imported.

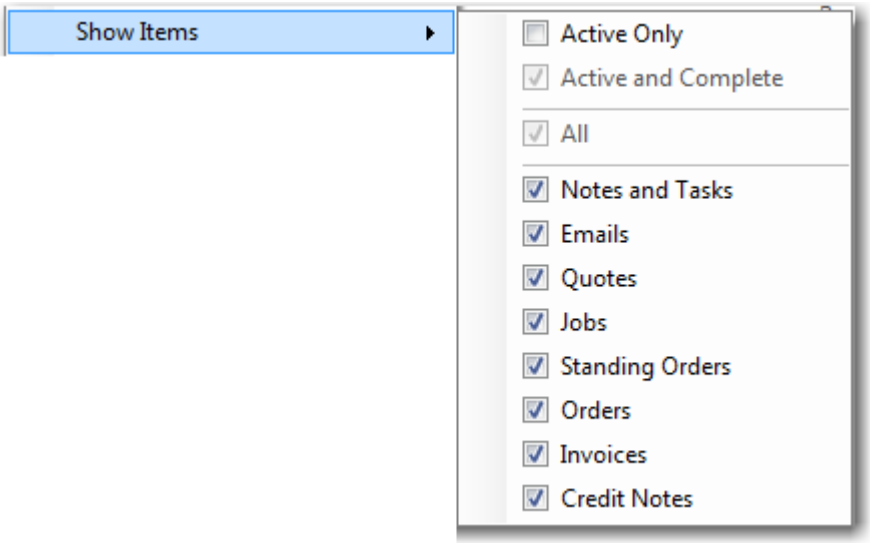
Import From Folder If your email is located on another computer you can export them to a folder as TXT or EML format and import them.

Import For This Customer Only Select this if you only want to include emails which match the email address on the selected contact.

Confirm Each Email Before Importing Select this if you want to selectively confirm which emails to import.

Show Items Menu

The Show Items menu allows you to filter the list of items displayed in the Contact History gadget on the Contact History page.

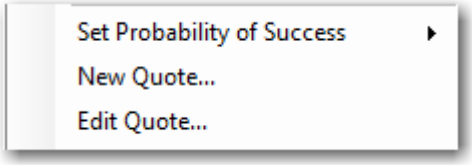


Active Only Select this to see only active items. This will hide invoices, credit notes, completed orders and any other item which has been marked as complete.

Jobs If you have PowerLink then you can also see jobs in the contact history.

Quotes Menu

The Quotes menu is available from the Active Quotes, Accepted Quotes and Rejected Quotes gadgets on the Opportunity page.



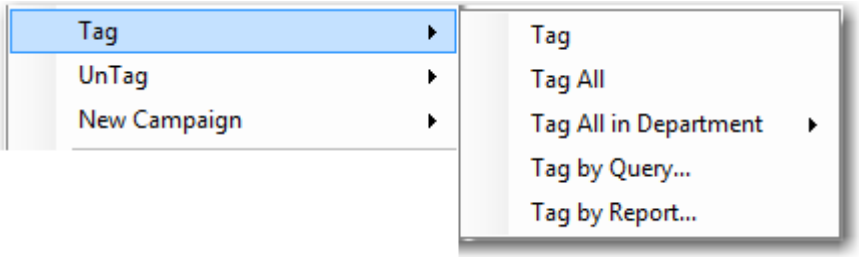
New Quote This opens the Quotation Entry screen.

Edit Quote This opens the Quotation Entry screen for the selected quote.

Set Probability of Success Right-click a quote and select Set Probability of Success. In the blank field, type a numeric probability (e.g. 90) of the quote being successful. This is used by ClearView to calculate potential sales revenue.

Tag and Un-Tag Menu

The Tag and Un-Tag menus are available from the Tagged List and Not Tagged List gadgets on the Marketing page.



Tag When selected all contacts will then be removed from the Not Tagged List and added to the Tagged List.

Tag All When selected all contacts will then be removed from the Not Tagged List and added to the Tagged List.

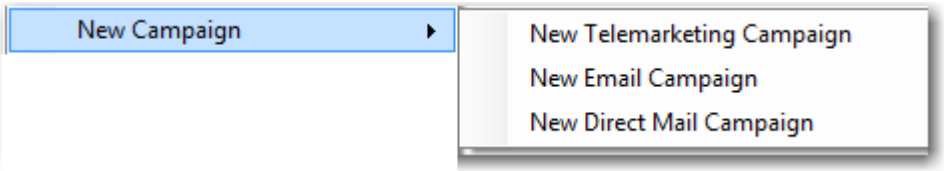
Tag All In Department Select the required department from the drop-down list.

Tag By Query You can build complex queries to decide which contacts you want to tag. For example, you may use a Customer User Defined Field to store which customers want to receive emails from you. See section Tagging Contacts Using a Query for more information.

Tag by Report You can tag contacts on the basis of whether they appear on a report. This is a similar concept to tagging contacts by query. See section Tagging Contacts Using a Report for more information.

New Campaign (Marketing) Menu

The New Campaign menu is available from the Tagged List and Not Tagged List gadgets on the Marketing page. Contacts made during a marketing campaign update the contact history as well as sending out the information in a printed, email or verbal (telemarketing) format.



New Telemarketing Campaign This launches the New Campaign screen. See Telemarketing Campaign for more details.

New Email Campaign This launches the New Message screen. See Email Campaign for more details.

New Direct Mail Campaign This launches the New Message screen. See Direct Mail Campaign for more details.

Mail Service

Emails sent through ClearView CRM have their content created by the various ClearView processes e.g. Email Campaign that pass the emails to the ClearView Mail Service (installed with the Data Service) for processing. This is all done seamlessly so that after the emails have been generated the operator can return to other work while the emails are sent in the background.

The status of a user's emails can be checked by launching the Mail Service program. This program can be launched by clicking the email icon on the ClearView Tool bar.

The Mail Service program allows the current user to see four Mailboxes: Sent Items, Outbox, Deleted Items and Sent Fail Items.

Sent Items Displays emails that have been sent.

Outbox Displays emails that the system is trying to send.

Deleted Items Displays any emails that have been deleted.

Sent Fail Items Displays any emails that have failed to send.

Email Content Selecting an email from any of the mailboxes will display the contents in the right hand window. If the email is selected in the Sent Fail Items it will display the reason for the failure.

Attachment Icon The Attachment icon in the displayed email allows for the selection and opening of the Attachments.

View Mailbox For If the "SUPERVISOR" user launches the Mail Service program then they will be able to select and view any other users emails.

Previous Page and Next Page If a mailbox contains in excess of 50 emails then the other emails can be accessed using the Previous Page and Next Page buttons.

Delete Emails can be deleted from Sent Items or Outbox by clicking the Delete icon or pressing the delete button. These emails are moved to the Deleted Items. Emails can be permanently deleted from the Deleted Items by clicking the Delete icon or pressing the delete button. NB. It is possible to select multiple emails in a mailbox for a bulk delete.

Send This button is enabled during the sending process. If any outbox emails are pending for a long time press this button to initiate re-sending. EDS will check the possibility of re-sending and if possible, it re-sends the pending emails.

Cancel Pressing this button will cancel any sending processes initiate by the user and delete all outbox email files. No confirmation will be sent to the user for already sent emails of those batches.

REFRESH Refresh the display.

Mail Server Logs Used for mail server trouble shooting

Gadget Content and Features

Please also refer to the Gadget Context Menu section for information about actions that can be performed within gadgets.

CRM Home page

To Do List

Displays active Tasks for the selected sales Rep based on the Next Date (due date). By default you'll see 'Today' mode, which shows overdue tasks and reminders in red.

Refresh the gadget to see changes made to existing tasks, or tasks added by other staff and coded to your Rep code.

There are 3 Gadget Tool Bar Buttons:

- **Active** – displays active tasks.
- **Complete** – displays complete tasks.
- **All** – displays all tasks.

Actions that can be performed within this gadget include:

- **Drill into a task.** Click the relevant Details field to open the task.
- **Drill into a customer.** Click the relevant Code field to open the enquiry screen for that customer.
- **See your upcoming tasks.** Click This Week or Next Week to see all active tasks with the Next Date within this range.
- **See your future tasks.** Bolded dates in the calendar indicate that you have at least one item scheduled for this date. Click the date to see details. Note: For Recurring Tasks, only the next occurrence will appear in the calendar.
- **See tasks for a different Attaché user.** Change the Rep code in the ClearView toolbar to see tasks for a different person. Note: this is only available if configured in ClearView Options.
- **Add tasks and reminders for yourself or others.** Type details into the task bar where it says **Type to add a new item** then press the **+** icon. You can also add items using the New Item Menu. See also the Tutorial section.
- **Filter the data.** Use the right-click context menu to see the data you need. E.g. right-click a customer code and choose Filter By Selection to see active tasks for that particular customer. This is a temporary change that will be re-set when the filter is removed or the page is refreshed.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.

- **Create new contact history records.** Right-click and select New to create a new Note, Task, Recurring Task, Email, Quote, Order, Invoice, Credit Note or Standing Order. Refer *Contact History* section for more details.

Customer Details page

Other than the Customer Search, all gadgets on this page are focussed toward a specific customer.

To see data in these gadgets you must first select a customer. To do this, find the customer via the Customer Search gadget, then click the customer Name. You can also use the Select Customer Menu to select a customer.

You'll notice that the captions of the customer-focussed gadgets now include the customer code (e.g. "ABEL Contact List"). You can drill into the selected customer by clicking the customer code in the gadget caption.

To change to a different customer, search again in the Customer Search gadget. Alternatively you can right-click inside any gadget and select **Customer Search**. As you start typing the customer's name the selection list will display possible matches. Click the relevant name to select the customer.

When you do so, the gadgets on this page (and other customer-focussed pages) will reflect your new selection.

Customer Search

Lists all active customers (or the search results) in Code order and displays contact details, assigned Sales Rep code and balance information.

Refresh the gadget to pick up recent processing changes including customer invoices, payments, credit adjustment notes and adjustments as well as masterfile changes (address, phone, contact, inactive flag, etc).

There are 3 Gadget Tool Bar Buttons:

- **Active** – displays active customers
- **Inactive** – displays inactive customers
- **All** – displays all customers. Inactive Customers displayed in red.

Actions that can be performed within this gadget include:

- **Search for a customer based on various criteria.** This could be part of the customer name, contact name, phone number, comment, etc. Click the search icon to execute the search.
- **Select a customer.** Click on a customer's **Name** to select the customer thereby causing all other gadgets on this page (and those on the Contact History and Sales History pages) to filter based on this customer. This will also cause the gadget captions to be prefixed by the customer's code (e.g. "ABEL Balances").

  You can also use the Select Customer Menu to select a customer which is often more convenient.
- **Drill into a customer.** Click the relevant Code field to open the enquiry screen for that customer.
- **See more details.** Use the navigation arrows to scroll or right-click and select Full Screen View.
- **Change the data sort order.** Click a column heading to sort by that column. E.g. click **Balance** to sort in ascending order by total balance owing; click again to sort in descending order. This is a temporary change that will be re-set when the page is refreshed.
- **Filter the data.** Use the right-click context menu to see the data you need. E.g. right-click a Sales Rep code and choose Filter By Selection to see only the customers coded to this sales rep. This is a temporary change that will be re-set when the filter is removed or the page is refreshed.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.

- **Create new contact history records.** Right-click and select New to create a new Note, Task, Recurring Task, Email, Quote, Order, Invoice, Credit Note or Standing Order. Refer *Contact History* section for more details.

Summary

Displays aged balances, sales, cost and gross profit data (period to date and year to date) as well as last payment and last sales details for the selected customer.

Refresh the gadget to pick up recent processing changes including customer invoices, payments, credit adjustment notes and adjustments.

There is 1 Gadget Tool Bar Button:

- **Enquire** – Opens the Customer Enquiry form for the currently selected customer.

Actions that can be performed within this gadget include:

- **See more details.** Use the navigation arrows to scroll or right-click and select Full Screen View.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.

Contact List

This displays a list of all Contacts for the selected customer, with details including the name, phone, email address, department, position and more.

Refresh the gadget to pick up recent changes to contact details via the Electronic Contact Details Manager (ECDM).

There is 1 Gadget Tool Bar Button:

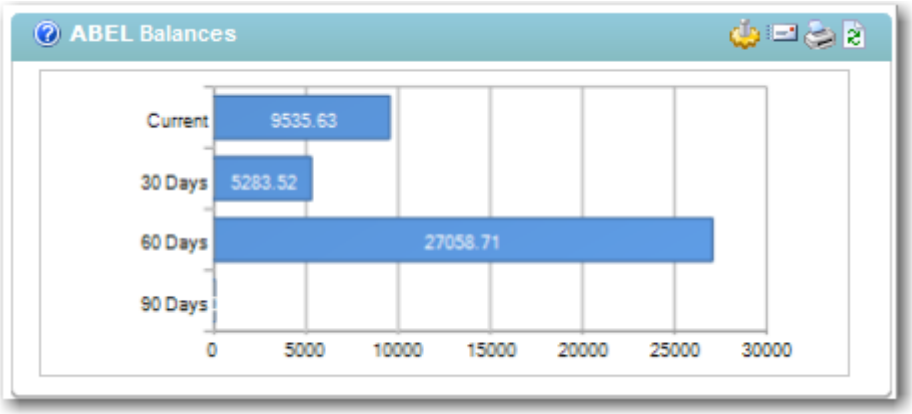
- **Contacts Manager** – Opens Contacts Manager for selected customer.
- **Email Contacts** – Send Email to all contacts for selected customer.

Actions that can be performed within this gadget include:

- **Email an individual contact.** Left-click the relevant Email field for a contact. This tags the contact and launches the New Message screen. Alternatively you can right-click the contact and select Contact – Send Email to Contact. Also see section on creating emails.
- **Email all contacts.** Right-click anywhere within the gadget and select Contact – Send Email to All Contacts. This tags all contacts and launches the New Message screen. Also see section on creating emails.
- **Edit a contact**. Right-click the contact and select Contact – Edit Contact. This opens the ECDM at the selected contact for editing. Refresh the gadget to see changes (sometimes changes may take a several seconds before they appear).
- **See more details***.* Use the navigation arrows to scroll or right-click and select Full Screen View.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.
- **Create new contact history records.** Right-click and select New to create a new Note, Task, Recurring Task, Email, Quote, Order, Invoice, Credit Note or Standing Order. Refer *Contact History* section for more details.

Balances

This displays aged balances for the selected customer in chart format.



Balances are based on ageing configuration in Setups – Customers – Options – Customer Options. To see a larger image, right-click and move to Full Screen View.

Refresh the gadget to pick up recent processing changes including customer invoices, payments, credit adjustment notes and adjustments.

Outstanding Invoices

This displays outstanding invoices for the selected customer, with the most recent at the top.

Refresh the gadget to pick up recent processing changes including customer invoices, payments, credit adjustment notes and adjustments.

There are 5 Gadget Tool Bar Buttons:

- **Overdue** – displays all overdue invoices for selected customer
- **Today** – displays all invoices due today for selected customer
- **This Week** – displays all invoices due this week for selected customer
- **This Month** – displays all invoices due this month for selected customer
- **All** – displays all outstanding invoices for selected customer

Actions that can be performed within this gadget include:

- **Drill into an invoice.** Click the relevant Number field to open the lookup screen for that invoice.
- **Change the data sort order.** Click a column heading to sort by that column. E.g. click **Balance** to sort in ascending order by invoice balance; click again to sort in descending order. This is a temporary change that will be re-set when the page is refreshed.
- **Filter the data.** Use the right-click context menu to see the data you need. E.g. right-click an invoice number and choose Filter Excluding Selection to remove that invoice from the display. This is a temporary change that will be re-set when the filter is removed or the page is refreshed.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.
- **Create new contact history records.** Right-click and select New to create a new Note, Task, Recurring Task, Email, Quote, Order, Invoice, Credit Note or Standing Order. Refer *Contact History* section for more details.
- **Export the data to Excel or PDF.** Right-click and select Save As (Excel or PDF) to save the data in these formats.

Sales

This displays monthly sales for the selected customer in chart format.

There are 2 Gadget Tool Bar Buttons:

- **6 Months** – displays sales information based on previous 6 months sales.
- **12 Months** – displays sales information based on previous 12 months sales.

To see a larger image, right-click and move to Full Screen View.

Refresh the gadget to pick up recent processing changes including customer invoices, payments, credit adjustment notes and adjustments.

Contact History page

All gadgets on this page focus on a selected customer.

You can also use the Select Customer Menu to select a customer. You can change to a different customer by pressing the right-click mouse button inside any gadget and select **Customer Search**. As you start typing the customer's name the selection list will display possible matches. Click the relevant name to select the customer.

If you've already selected a customer via the Customer Search gadget on the Customer Details page, you'll immediately see details on this screen.

You'll also see the customer's code in the gadget captions. You can drill into the selected customer by clicking the customer code in the gadget caption.

When you do so, all gadgets on this page (and other customer-focussed pages) will reflect your new selection.

Contact List

This is the same as the Contact List on the Customer Details Page.

Summary

Displays contact details, credit limit and total debtor balance for the selected customer.

There is 1 Gadget Tool Bar Button:

- **Enquire** – Opens the Customer Enquiry form for the currently selected customer.

Contact History

This displays a comprehensive contact history for the selected customer.

Each history record has a Type: Note, Email, Quote, Invoice, Std Order, Order, Credit Note.

Tasks are also categorised as Notes for display purposes.

Contact history Emails are really just tasks which were generated automatically by an email.

If a record is complete you'll see a **Y** in the **Complete** column. Invoices and Credit Notes will always appear as complete because as the document cannot be edited. Orders will only appear as Complete if all lines have been converted to an invoice. Quotes will appear as Complete if the status is Accepted or Rejected.

If a Note or Task has documents attached, you'll see a **@** in the **Att** column. In the case of Emails this will be a copy of the email sent.

Refresh the gadget to pick up recent processing changes including customer invoices, payments, and credit adjustment notes.

There are 11 Gadget Tool Bar Buttons:

- **Tasks/Notes** – displays tasks/notes for selected customer.
- **Emails** – displays emails for selected customer.
- **Quotes** – displays quotes for selected customer.
- **Orders** – displays orders for selected customer.
- **Credit Notes** – displays credit notes for selected customer.
- **Invoices** – displays invoices for selected customer.

- **Std Orders** – displays std orders for selected customer.
- **All** – displays contact history for selected customer.
- **Active** – displays active contacts.
- **Complete** – displays complete contacts.
- **All** – displays all contacts.

Actions that can be performed within this gadget include:

- **Edit active records.** Right-click the relevant record and select the Edit context menu item.
- **Drill into completed documents.** If you select to Edit a completed Attaché document (i.e. Type is Quote, Invoice, Order, Credit Note and Complete = Y), the relevant Look-up screen will launch.
- **Create new contact history records.** You can add new records using the New Item Menu. Right-click and select New to create a new Note, Task, Recurring Task, Email, Quote, Order, Invoice, Credit Note or Standing Order.
- **See more details.** Use the navigation arrows to scroll or right-click and select Full Screen View.
- **Filter by record status.** Use the Show Items context menu to toggle between displaying Active Only or Active and Complete records.
- **Filter by record type.** Use the Show Items context menu to restrict the history to certain types (e.g. untick Notes or Quotes to exclude them from the list). To see the entire history, click All.
- **Change the data sort order.** Click a column heading to sort by that column. E.g. click **Type** to sort in ascending order by record type; click again to sort in descending order. This is a temporary change that will be re-set when the page is refreshed.
- **Filter the data.** Use the right-click context menu to see the data you need. E.g. right-click a Sales Rep code and choose Filter By Selection to see records relating to that particular sales rep. This is a temporary change that will be re-set when the filter is removed or the page is refreshed.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.
- **Export the data to Excel or PDF.** Right-click and select Save As (Excel or PDF) to save the data in these formats.

Sales History page

All gadgets on this page focus on a selected customer.

If you've already selected a customer via the Customer Search gadget on the Customer Details page, you'll immediately see details on this screen.

You'll also see the customer's code in the gadget captions. You can drill into the selected customer by clicking the customer code in the gadget caption.

You can also use the Select Customer Menu to select a customer. You can change to a different customer by pressing the right-click mouse button inside any gadget and select **Customer Search**. As you start typing the customer's name the selection list will display possible matches. Click the relevant name to select the customer.

When you do so, all gadgets on this page (and other customer-focussed pages) will reflect your new selection.

Monthly Sales - Table

This displays product sales values (ex-GST) for the last 6 or 12 months for the selected customer in ascending order by product code.

Products are consolidated by location, e.g. sales of code WIDGET from location 1 and 2 are totalled under WIDGET.

Refresh the gadget to pick up recent processing changes: customer invoices and credit adjustment notes.

There are 6 Gadget Tool Bar Buttons:

- **6 Months** – displays sales information based on previous 6 months sales.
- **12 Months** – displays sales information based on previous 12 months sales.
- **$ Value** – displays sales in $ value.
- **Qty** – displays sales in quantity.
- **Incl Sund** – includes sundry lines in the calculations.
- **Excl Sund** – excludes sundry lines in the calculations.

Actions that can be performed within this gadget include:

- **See more details.** Use the navigation arrows to scroll or right-click and select Full Screen View.
- **Change the data sort order.** Click a column heading to sort by that column. E.g. click **Total** to sort in ascending order by sales value over the last 6 months; click again to sort in descending order. This is a temporary change that will be re-set when the page is refreshed.
- **Add column totals.** Right-click and select Totals.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.

Monthly Sales - Chart

This displays monthly sales for the selected customer in chart format.

There are 2 Gadget Tool Bar Buttons:

- **6 Months** – displays sales information based on previous 6 months sales.
- **12 Months** – displays sales information based on previous 12 months sales.

To see a larger image, right-click and move to Full Screen View.

Refresh the gadget to pick up recent processing changes including customer invoices, payments, credit adjustment notes and adjustments.

Product Sales Register

This displays product sales and credits in descending order (most recent at the top) for the selected customer.

Product details are displayed: Qty Sold, unit Price, Discount %, Sales Value (excludes GST), and % GP. The Period and Quarter are also displayed.

Refresh the gadget to pick up recent processing changes: customer invoices and credit adjustment notes.

There are 4 Gadget Tool Bar Buttons:

- **Today** – displays all Product Sales made today
- **This Week** – displays all Product Sales made this week

- **This Month** – displays all Product Sales made this month
- **12 Months** – displays all Product Sales made in the last 12 months

Actions that can be performed within this gadget include:

- **Drill into a product.** Click the relevant Product field to open the enquiry screen for that product.
- **Drill into an invoice (or credit note).** Click the relevant Doc No to open the lookup screen for that invoice or credit.
- **See more details.** Use the navigation arrows to scroll or right-click and select Full Screen View.
- **Change the data sort order.** Click a column heading to sort by that column. E.g. click **% GP** to sort in ascending order by gross profit percentage; click again to sort in descending order. This is a temporary change that will be re-set when the page is refreshed.
- **Filter the data.** Use the right-click context menu to see the data you need. E.g. right-click a Product code and choose Filter By Selection to see sales of that particular product. This is a temporary change that will be re-set when the filter is removed or the page is refreshed.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.
- **Export the data to Excel or PDF.** Right-click and select Save As (Excel or PDF) to save the data in these formats.

Customer Sales Register

This displays customer sales and credits in invoice date descending order (most recent at the top).

See Sales Value (ex-GST before discount), Sale Discount, Tax Amount, Cost Value and %GP. The Sales Rep is shown per the invoice and the Period is also displayed.

Refresh the gadget to pick up recent processing changes: customer invoices and credit adjustment notes.

There are 4 Gadget Tool Bar Buttons:

- **Today** – displays all Sales made today
- **This Week** – displays all Sales made this week
- **This Month** – displays all Sales made this month
- **12 Months** – displays all Sales in the last 12 months

Actions that can be performed within this gadget include:

- **Drill into a product.** Click the relevant Product field to open the enquiry screen for that product.
- **Drill into an invoice (or credit note).** Click the relevant Doc No to open the lookup screen for that invoice or credit.
- **See more details.** Use the navigation arrows to scroll or right-click and select Full Screen View.
- **Change the data sort order.** Click a column heading to sort by that column. E.g. click **% GP** to sort in ascending order by gross profit percentage; click again to sort in descending order. This is a temporary change that will be re-set when the page is refreshed.
- **Filter the data.** Use the right-click context menu to see the data you need. E.g. right-click a Sales Rep code and choose Filter By Selection to see sales attributed to that rep. This is a temporary change that will be re-set when the filter is removed or the page is refreshed.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.

- **Export the data to Excel or PDF.** Right-click and select Save As (Excel or PDF) to save the data in these formats.

Product Sales - Table

Displays total sales by product to the selected customer over the past 12 months, in table view. For each product code, see total Qty, Value, Average Unit Price, Minimum Unit Price and Maximum Unit Price.

Refresh the gadget to pick up recent processing changes: customer invoices and credit adjustment notes.

There are 4 Gadget Tool Bar Buttons:

- **Today** – displays all Product Sales made today
- **This Week** – displays all Product Sales made this week
- **This Month** – displays all Product Sales made this month
- **12 Months** – displays all Product Sales in the last 12 months

Actions that can be performed within this gadget include:

- **Drill into a product.** Click the relevant Product field to open the enquiry screen for that product.
- **See more details.** Use the navigation arrows to scroll or right-click and select Full Screen View.
- **Change the data sort order.** Click a column heading to sort by that column. E.g. click **Qty** to sort in ascending order by quantity sold; click again to sort in descending order. This is a temporary change that will be re-set when the page is refreshed.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.
- **Export the data to Excel or PDF.** Right-click and select Save As (Excel or PDF) to save the data in these formats.

Product Sales - Chart

Displays total sales by product to the selected customer over the past 12 months, in chart view. To see a larger image, right-click and move to Full Screen View.

Refresh the gadget to pick up recent processing changes: customer invoices and credit adjustment notes.

There are 4 Gadget Tool Bar Buttons:

- **Today** – displays all Product Sales made today
- **This Week** – displays all Product Sales made this week
- **This Month** – displays all Product Sales made this month
- **12 Months** – displays all Product Sales in the last 12 months

Group Sales - Table

Displays total sales by product group to the selected customer over the past 12 months, in table view. For each product group, see total Qty, Value, Average Unit Price, Minimum Unit Price and Maximum Unit Price.

Refresh the gadget to pick up recent processing changes: customer invoices and credit adjustment notes.

There are 4 Gadget Tool Bar Buttons:

- **Today** – displays all Product Group Sales made today

- **This Week** – displays all Product Group Sales made this week
- **This Month** – displays all Product Group Sales made this month
- **12 Months** – displays all Product Group Sales in the last 12 months

Actions that can be performed within this gadget include:

- **See more details.** Use the navigation arrows to scroll or right-click and select Full Screen View.
- **Change the data sort order.** Click a column heading to sort by that column. E.g. click **Qty** to sort in ascending order by quantity sold; click again to sort in descending order. This is a temporary change that will be re-set when the page is refreshed.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.
- **Export the data to Excel or PDF.** Right-click and select Save As (Excel or PDF) to save the data in these formats.

Group Sales - Chart

This displays total sales by product group to the selected customer over the past 12 months, in chart view. To see a larger image, right-click and move to Full Screen View.

Refresh the gadget to pick up recent processing changes: customer invoices and credit adjustment notes.

There are 4 Gadget Tool Bar Buttons:

- **Today** – displays all Product Group Sales made today
- **This Week** – displays all Product Group Sales made this week
- **This Month** – displays all Product Group Sales made this month
- **12 Months** – displays all Product Group Sales in the last 12 months

Opportunity page

This page focuses on quotes assigned to the Sales **Rep** selected in the Dashboard Toolbar. The rep code is normally linked to your user name, so that ClearView automatically detects the appropriate Rep. Linking of the logon to a Sales Rep is setup in the ClearView Options.

If you're authorised via the ClearView options, you can change the Rep code to see quotes for other (or all) reps. If you're not authorised this will be disabled.

Active Quotes – Table

This displays active quotes (those with status 'Entered') for the selected Rep, in table format.

Details include customer, expiry date, total value, comment, period and more.

Refresh the gadget to pick up recent processing changes: new quotes, modifications, deletions and status changes.

There are 5 Gadget Tool Bar Buttons:

- **Expired** – displays all active quotes that have expired.
- **Today** – displays all active quotes that are due to expire today
- **This Week** – displays all active quotes that are due to expire this week
- **This Month** – displays all active quotes that are due to expire this month

- **All** – displays all active quotes

Actions that can be performed within this gadget include:

- **Create a new quote.** Right-click within the gadget and select New Quote to open the Quotation Entry screen.
- **Edit an existing quote.** Click the Quote No (or right-click and select Edit Quote) to open the Quotation Entry screen for the selected quote.
- **Add a probability of success.** Right-click a quote and select Set Probability of Success. In the blank field, type a numeric probability (e.g. 90) of the quote being successful. This is used by ClearView to calculate potential sales revenue.
- **Drill into a customer.** Click the relevant Code to open the enquiry screen for that customer.
- **Change the data sort order.** Click a column heading to sort by that column. E.g. click **Total Value** to sort in ascending order by quote value; click again to sort in descending order. This is a temporary change that will be re-set when the page is refreshed.
- **Filter the data.** Use the right-click context menu to see the data you need. E.g. right-click a customer code and choose Filter By Selection to see just the quotes for that customer. This is a temporary change that will be re-set when the filter is removed or the page is refreshed.
- **See more details.** Use the navigation arrows to scroll or right-click and select Full Screen View.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.
- **Export the data to Excel or PDF.** Right-click and select Save As (Excel or PDF) to save the data in these formats.

Accepted Quotes

Displays quotes with status 'Accepted' for the selected Rep.

Details include customer, expiry date, total value, comment, period and more.

Refresh the gadget to pick up recently accepted quotes.

There are 4 Gadget Tool Bar Buttons:

- **Today** – displays all accepted quotes created today
- **This Week** – displays all accepted quotes created this week
- **This Month** – displays all accepted quotes created this month
- **All** – displays all accepted quotes

Actions that can be performed within this gadget include:

- **Drill into a quote.** Click the relevant Quote No to open the look-up screen for that quote.
- **Drill into a customer.** Click the relevant Code to open the enquiry screen for that customer.
- **Create a new quote.** Right-click within the gadget and select New Quote to open the Quotation Entry screen.
- **Change the data sort order.** Click a column heading to sort by that column. E.g. click **Total Value** to sort in ascending order by quote value; click again to sort in descending order. This is a temporary change that will be re-set when the page is refreshed.
- **Filter the data.** Use the right-click context menu to see the data you need. E.g. right-click a customer code and choose Filter By Selection to see just the accepted quotes for that customer. This is a temporary change that will be re-set when the filter is removed or the page is refreshed.

- **See more details.** Use the navigation arrows to scroll or right-click and select Full Screen View.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.

Active Quotes – Chart

This displays active quotes (those with status 'Entered') by month for the selected Rep, in chart format.

The month displayed relates to the Period. To see a larger image, right-click and move to Full Screen View.

Refresh the gadget to pick up recent processing changes: new quotes, modifications, deletions and status changes.

There are 5 Gadget Tool Bar Buttons:

- **Expired** – displays all active quotes that have expired.
- **Today** – displays all active quotes that are due to expire today
- **This Week** – displays all active quotes that are due to expire this week
- **This Month** – displays all active quotes that are due to expire this month
- **All** – displays all active quotes

Rejected Quotes

Displays quotes with status 'Rejected' for the selected Rep.

Details include customer, expiry date, total value, comment, period and more.

Refresh the gadget to pick up recently rejected quotes.

There are 4 Gadget Tool Bar Buttons:

- **Today** – displays all rejected quotes created today
- **This Week** – displays all rejected quotes created this week
- **This Month** – displays all rejected quotes created this month
- **All** – displays all rejected quotes

Actions that can be performed within this gadget include:

- **Drill into a quote.** Click the relevant Quote No to open the look-up screen for that quote.
- **Drill into a customer.** Click the relevant Code to open the enquiry screen for that customer.
- **Create a new quote.** Right-click within the gadget and select New Quote to open the Quotation Entry screen.
- **Change the data sort order.** Click a column heading to sort by that column. E.g. click **Total Value** to sort in ascending order by quote value; click again to sort in descending order. This is a temporary change that will be re-set when the page is refreshed.
- **Filter the data.** Use the right-click context menu to see the data you need. E.g. right-click a customer code and choose Filter By Selection to see just the rejected quotes for that customer. This is a temporary change that will be re-set when the filter is removed or the page is refreshed.
- **See more details.** Use the navigation arrows to scroll or right-click and select Full Screen View.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.

Marketing page

This page focuses on tagging recipients for inclusion in marketing campaigns.

To use the Department tagging features, you'll need to specify a Team for each contact in the Electronic Contact Details Manager with an associated Department in CRM Options. See the CRM Options section for more information.

Tagged List

This gadget displays all the customer contacts which are currently tagged.

When you select a customer (via the Search gadget on the Customer Details page or via the right-click Customer Search tool), their contacts are automatically tagged so they will appear in this list.

Refresh the gadget to pick up recent changes to contact details via the Electronic Contact Details Manager (ECDM).

There are 4 Gadget Tool Bar Buttons:

- **Untag All** – untag all contacts
- **Telemarketing Campaign** – new telemarketing campaign
- **Email Campaign** – new email campaign
- **Direct Mail Campaign** – new direct mail campaign

Actions that can be performed within this gadget include:

- **Tag all contacts.** Right-click and select Tag – Tag All. All contacts will then be removed from the Not Tagged list and added to this list.
- **Tag all contacts belonging to a particular Department (Team).** Right-click and select Tag – Tag All in Department. A field will display; select the required department from the drop-down list. (Tip: If you've just created a new Department, see Customer Departments, you need to restart ClearView before you can use it to tag).
- **Tag customers using a Report.** Right-click and select Tag – Tag by Report. Choose a report from the list, select the relevant parameters then Generate. When you close the report, ClearView will tag all contacts for the customers that appeared on the report. You can then UnTag individual contacts as required.

  TIP: If you have specific tagging requirements, speak to your Attaché Consultant about developing a custom tagging report to suit your needs. You will need the ClearView Report Designer for this.

- **Tag customers using a Query.** Right-click and select Tag – Tag by Query. You can build complex queries and save for future use. When you run a query you can opt to clear the current tagged list (Run) or add to the existing list (Run and Append).
- **Create a marketing Campaign.** Right-click and select New Campaign to create a Telemarketing, Email or Direct Mail campaign targeting the tagged contacts. For more information see *Campaigns*.
- **Un-tag individual (or all) contacts.** Right-click a contact and select UnTag – UnTag to remove the selected contact from the tagged list. If you select UnTag – UnTag All, all contacts will move to the untagged list.
- **See more details.** Use the navigation arrows to scroll or right-click and select Full Screen View.

- **Change the data sort order.** Click a column heading to sort by that column. E.g. click **Department** to sort in ascending order by department code; click again to sort in descending order. This is a temporary change that will be re-set when the page is refreshed.
- **Export the data to Excel or PDF.** Right-click and select Save As (Excel or PDF) to save the data in these formats.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.

NB: It is not possible to Tag Customers that have been flagged as inactive.

See also Not Tagged List.

Not Tagged List

This displays all the customer contacts which are not currently tagged.

As you tag contacts in this list (e.g. via right-click and select Tag – Tag), the contacts will be removed from this list and added to the Tagged list.

There are 3 Gadget Tool Bar Buttons:

- **Tag All** – tag all contacts
- **Tag By Query** – tag contacts using query
- **Tag By Report** – tag contacts using reports

For more information see Tagged List.

Campaigns

The New Campaign context menu on the Marketing Page allows you to launch a Telemarketing, Email or Direct Mail Campaign targeting the contacts that appear in the Tagged List.

Telemarketing campaign

When you create a telemarketing campaign, CRM will automatically generate a task for each of the tagged contacts so that you can control follow-ups and maximise any sales opportunities.

You can create a new telemarketing campaign using the New Campaign Menu from the Tagged List gadget. Right-click and select **New Campaign – New Telemarketing Campaign**.

This launches the New Campaign screen. You'll see a customer code in the To.. field for each tagged contact. If multiple contacts are tagged for one customer, the customer code will appear multiple times. If you'd like to remove any contact, click the **To…** button and un-tag as needed or close this screen and UnTag via the Tagged List.

Complete the remaining details for your campaign:

- **Details.** This information will appear in the campaign Task. E.g. "Call to discuss special offer on blenders".
- **Contact Type.** Select the appropriate contact type. You may wish to create a unique campaign code to facilitate future reporting.
- **Rep.** Select the sales rep who will perform the telemarketing tasks.

  TIP: If more than one rep will work on this promotion, create a separate Campaign for each rep.

- **Contact On.** Select the date the campaign is to start. This will become the Next Date (due date) for the campaign tasks.
- **Launch Campaign.** When satisfied with your campaign details, press this button. You'll be asked if it's OK to update the contact history. If you say OK, the campaign tasks will be generated and will appear in the To Do List for the selected Rep on the 'Contact On' date.

Email campaign

When you create an email campaign, ClearView creates an email which will be sent to each of the tagged contacts. You can choose whether to update the contact history for each recipient.

You can create a new email campaign using the New Campaign Menu from the Tagged List gadget. Right-click and select **New Campaign – New Email Campaign**.

This launches the New Message screen. You'll see each of the tagged contacts in the **To..** field along with their respective customer codes. If you'd like to remove any contact, click the **To..** button and untag as needed or close this screen and UnTag via the Tagged List.

This feature functions in the same way as creating a normal email. Refer to the section on *Creating Emails* for further details on how to compose your message.

Direct mail campaign

When you create a direct mail campaign, ClearView creates a letter which can be printed for each of the tagged contacts. You can choose whether to update the contact history for each recipient (this allows easy follow-up by a sales rep).

TIP: Your letters will be printed to the default Windows printer, so we recommend that you check this is correct via your computer's settings. If you need to change the default printer, do this first and restart ClearView before creating your campaign.

You can create a new direct mail campaign using the New Campaign Menu from the Tagged List gadget. Right-click and select **New Campaign – New Direct Mail Campaign**.

This launches the New Message screen. You'll see each of the tagged contacts in the To.. field along with their respective customer codes. If you'd like to remove any contact, click the To.. button and untag as needed or close this screen and UnTag via the Tagged List.

The message is composed in the same way as an email.

When you press Send, you will be asked if it's ok to print the letters to the default printer (see above).

My CRM Page

You can create your own gadgets using the Report Designer (sold separately) and place them in one of the blank gadgets on the "My CRM" page.

Add Custom CRM Gadget

The following procedure assumes that you have created or imported a custom gadget using the Report Designer. See Create Gadget using Report Designer section for more information.

To add your gadget to the dashboard:

1. Go to any "My Report" gadget on the My CRM page.
2. Click on the Edit Gadget Properties icon (which looks like a "gear" or "cog").
3. **Data Source**. Select your gadget from the list available. If you do not see your gadget in the list, make sure that the "Report Type" property (Report Properties) is set to "Dashboard Gadget".
4. **Save**. Press Save to update. You may need to restart the dashboard to see some changes come into effect.

Create Gadget Using the Report Designer

Additional reports and gadgets can be created using the Report Designer.

Note: You must have the Report Designer module installed to create your own reports. Contact your Attaché Consultant if you want to add modules. You can place custom gadgets on the My CRM page.

1. **Open Report Designer.** Press the Report Designer button on the main toolbar or use Setups | ClearView | Report Designer | Report Designer
2. **Copy Standard Report**. Select "Copy" - "Standard" to see a list of available reports and gadgets. CRM Gadgets start with "BI Enquiry CRM", while reports start with "CRM". Note: You can also create a report from scratch but this may require advanced skills.
3. **Report Name**. Give your new report a unique name.
4. **Save Report**. After making changes, you can Preview and the Save changes.

   (See "Report Designer User Guide" for more information about customising reports and gadgets. There are also a number of videos and other resources available on the web-site.)

Tutorials

This section shows you how to perform some common tasks such as creating tasks, notes and sending emails.

In depth features of CRM are not covered by the tutorials. If you need to find out more about CRM features, refer to the Using CRM section of the user guide.

Create a New Note

Notes allow you to record details about a conversation or event relating to a customer, where there is no follow-up required.

New Notes can be added using the New Item Menu (right-click and select **New – Note**). This launches the Note screen.

Note screen fields:

- **Date:** This is the date the note was entered. It defaults to the current date for new notes.
- **Contact Name:** Add a contact name if applicable.
- **Sales Rep:** Defaults to the selected Rep code (can be seen in the ClearView toolbar). If the task is to be assigned to a different staff member, change the Sales Rep code so it will appear in their To Do List.
- **Contact Type:** A Contact Type can be assigned to help categorise dealings with customers.
- **Complete:** This flags the note as complete, but it will still appear in the customer's contact history. You may wish to leave a note active if it needs any form of monitoring. E.g. a customer

may have mentioned they are changing their postal address, but don't know it will take effect. You can filter Contact History for Active items using the Show Items context menu.

- **Customer:** Notes are intended to be assigned to a customer. If you'd like to add a reminder that doesn't relate to a customer, create a task.
- **Attach File:** You can attach documents to a task. If attachments already exist for a note, you'll see a paperclip graphic next to the Complete field. View the attachments by clicking on the paperclip. Attachments are copied into the Documents folder for the selected customer.

Create a New Task

Tasks are similar to Notes but with more functionality. Tasks must have a Due Date (Next Date) which is used when displaying tasks which are due or overdue.

New tasks can be added using the New Item Menu (right-click and select **New – Task**), or via the To Do List gadget task bar. Either method launches the Task screen where more details can be added.

To add a task via the CRM Home page task bar, type the details into the To Do List task bar and click the Plus sign.

To create a future task, you can select the required date in the To Do List calendar before adding the task. For example, to create a reminder for the following Friday, click that date in the calendar then type the details into the task bar. This will set the Next Date (due date) appropriately. Alternatively you can simply set the Next Date to the relevant date in the task screen.

Task screen fields:

- All the same fields as for Notes (see earlier section) but with additional functionality:
- **Next Date:** This is used when displaying active tasks in the To Do List. When creating a new task, the Next Date defaults to the system date or to a future date if selected in the calendar (see above). The Next Date can be changed if required.
- **Complete:** When a task is finished it can be marked as Complete, which will remove it from the To Do List. If the task is associated with a customer code it will still appear in that customer's contact history.
- **Customer:** You can assign a customer code to a task. If the task doesn't relate to a specific customer, leave this field blank. E.g. create a reminder for Sandra in Sales to update a price list.
- **Follow-Up:** This will mark the current task as Complete and create a new task using details from the current task. This is useful when performing tasks like debt collection.
- **Recurrence:** You can convert a normal one-off task into a recurring task. See the section on Recurring Task for more details.

Create a New Recurring Task

Recurring Tasks are tasks with a recurrence rule attached to them (eg. "Every Monday").

New recurring Tasks can be added using the New Item Menu (right-click and select **New – Recurring Task**). You can also convert a normal task to a recurring task using the **Recurrence** button in the task entry screen. Either method will launch the Task Recurrence screen.

Select the Recurrence pattern (Daily, Weekly, Monthly or Yearly) and timeframe (Start and End date). The Next Recurrence Date is automatically calculated based on these selections.

Once you've decided on the recurrence details, press Ok. You'll notice that the Date and Next Date fields are greyed-out; these are now controlled by the recurrence pattern. The remaining fields operate as for normal tasks (refer above).

In your To Do List you'll see only the next single occurrence of the task. This avoids cluttering the To Do List with tasks that don't yet need to be considered.

TIP: If you'd like to see more than the next single occurrence of the task in your calendar (i.e. if you to see tasks that lie further into the future), you can add multiple recurring tasks. E.g. instead of a single recurring weekly task scheduled for Monday, you could add five monthly tasks for the first, second, third, fourth and fifth (if applicable) Monday of each month.

Editing a Recurring Task

When you edit a recurring task, you'll be asked whether you want to edit the **Series** or just this **Occurrence**. This depends on what you want to do.

If you want to change the recurrence pattern or details of the task, you would **Edit the Series**. E.g. an outstanding debt was being followed up monthly but now needs weekly attention, so you want to change to Weekly and update the task details accordingly. This change will affect every future occurrence.

If you want to action today's task, you would **Edit this occurrence**. E.g. your task says to call customer ABEL about their outstanding debt, so you want to record today's discussions. The changes you make will only affect this occurrence, and a new task will be automatically generated for the next relevant date.

Create a New Email

When you create an email for the first time you'll need to type your email address into the From field, and modify your Name if required (e.g. add your surname). ClearView remembers this information for next time.

New Emails can be added using the New Item Menu (right-click and select **New – Email**). This launches the New Message screen.

Whether you're emailing one contact or many, the basic process is the same:

- **Choose your recipients.** This is done automatically if create your email via the Contact List (on the Customer Details or Contact History pages) or via the Tagged List (on the Marketing page).

  Click the To.. button and select to Show Tagged to see details.
- **Type in your Subject.** Per a normal email.
- **Attach documents (if required).** Browse via the Attach button.
- **Compose your message.** See section Compose a Message Using HTML Editor for more information.
- **Update History.** If you would like this email to appear in the customer/s Contact History, tick this box. ClearView will create a Task for each recipient which will be displayed as an **Email** type on the customer's Contact History. For this to happen you need to complete the relevant fields:
  - **Save Copy of Email.** This will save the original email contents as an EML file in the documents folder for each customer (refer ClearView Options for more details) and show it as an attachment to the task. For bulk emails, you may choose to un-tick this option to save space on your system.
  - **Contact Type.** Select the appropriate Contact Type.
  - **Contact On.** If you'd like to be prompted to follow-up the email, select a date in this field. This will leave the task active so it will appear in the To Do List. If no follow-up is required leave this field blank; the task will then be marked as complete.
  - **Rep.** Select the sales rep code associated with this email. If a follow-up is to be performed by another staff member, you may wish to select their rep code.

- **Send.** This will send the email and update the contact history (if selected). If an email bounces back you'll need to resend the message and update the contact history to reflect.

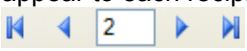
Compose a Message using the HTML Editor

CRM includes an HTML editor so you can format your emails professionally. This editor is displayed when the New Message form is displayed when creating an email or a letter (direct mail campaign).

Below are definitions of the more commonly used tools:

Design mode. In design mode you can type into the body of the email then format your text in a similar way to a Word document. Change the font style, colour and size. Indent, underline italicise or bold your text. Change the alignment and add bullets or numbering.

View HTML code. If you're familiar with HTML, or to paste HTML into your email composition, use this function.

Print preview. Use this button to view the way your email (or mail merge letter) will appear to each recipient. When you click this button you'll see a navigation control 

which allows you to scroll through the recipients.

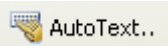
Zoom in. This allows you to maximise (or minimise) the email body.

Open. This control allows you to open pre-existing HTML documents or email templates.

Save. Save your email for use as an email template to streamline communications.

Insert picture. Browse to select an image file, e.g. your company logo. To ensure all recipients can view the image, publish it on your website and use the URL as the Source (via image settings: double-click the picture).

Insert line. Inserts a line into your email composition.



AutoText. If there are some words you commonly use (e.g. "Thanks for your order! It's always a pleasure to work with you.") highlight the words and click this button. You can then give your autotext a name (e.g. Signoff) so you can quickly add this text into your emails in future.

Fields. This allows you to personalise your email composition by adding customer masterfile fields. E.g. **Dear <<[CcFirstName]>>,** will display as Dear Tim, Dear Alison, etc. Within moments you can create useful templates that you'll use everyday.

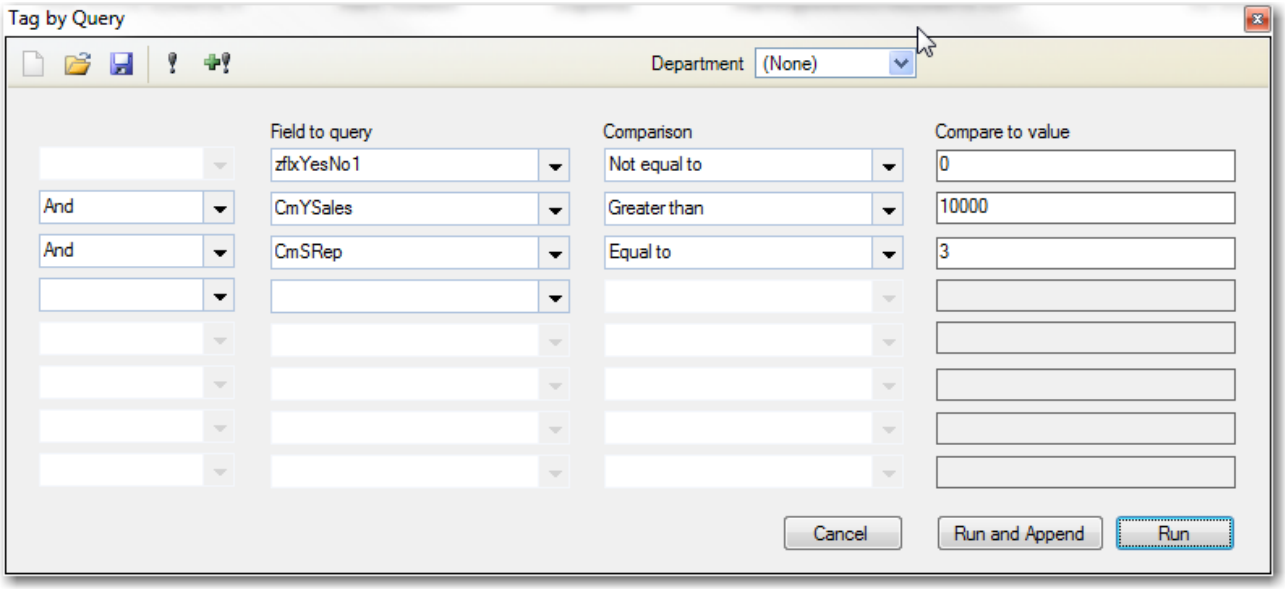
Print. Prints a "design view" copy of the email being composed. This will not print a copy of the email if composing an email for multiple recipients; only a single copy is printed using the "design view" for proof reading. If you use Fields (see above) the formula will be printed, not the value that will be actually sent to the recipient.

Tagging Contacts Using a Query

Select the **Tag by Query** option from the Tag Menu and enter the query you want. For example, you may want to send an email to those customers with sales exceeding $10000 who are assigned to you but only if they want to receive marketing material from you.

The User Defined Fields are displayed as **zFlx** and are useful for storing marketing information. The Yes No fields are 0 when "No" is selected or otherwise "Yes".

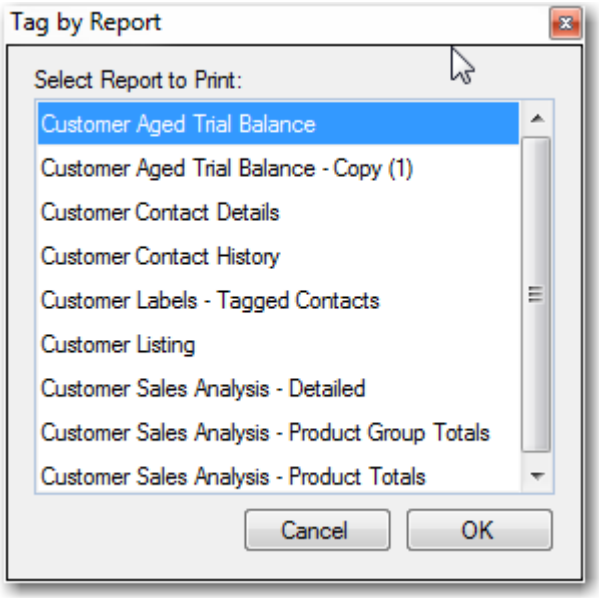
Press **Run** or **Run and Append** to tag contacts.



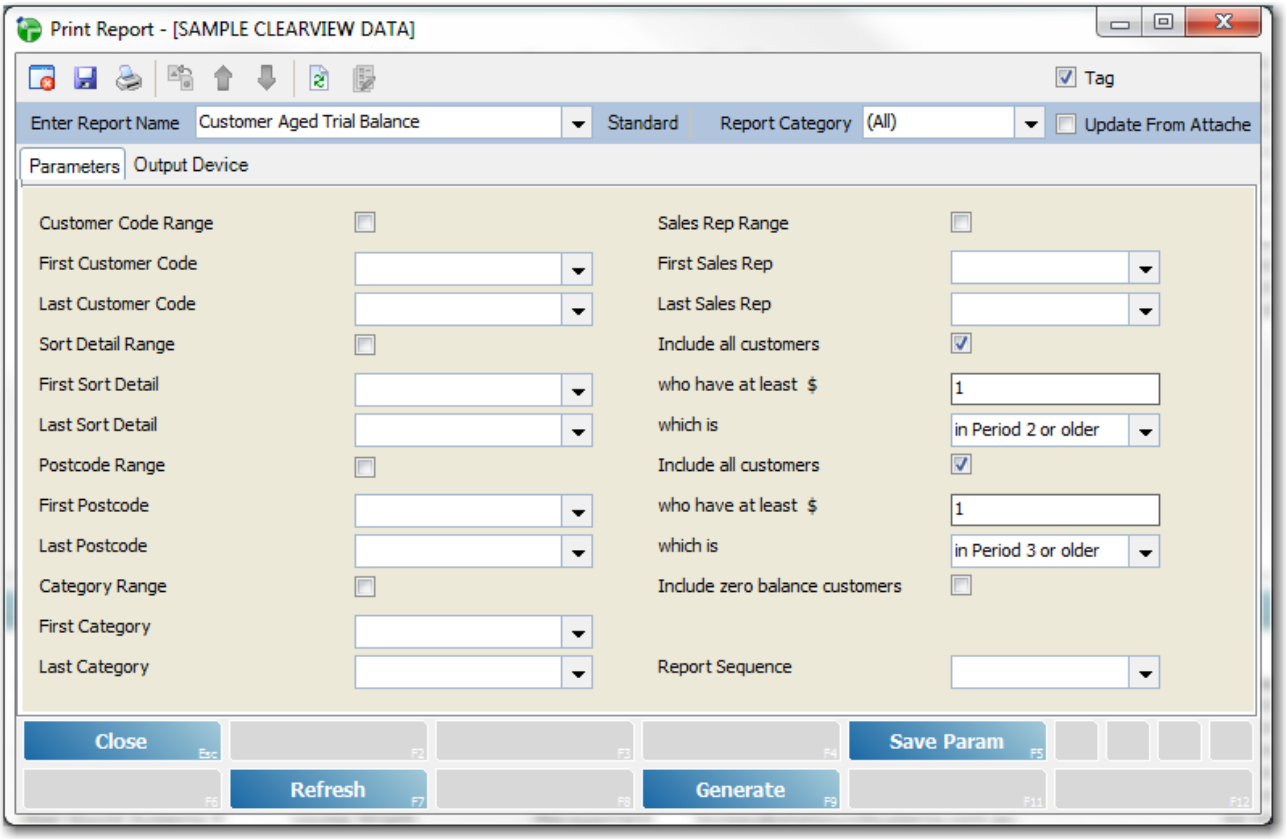
The resulting tagged list of customer will appear in the Tagged List. Remove unwanted recipients by selecting **Filter by Selection** from the Dashboard Menu.

Tagging Contacts Using a Report

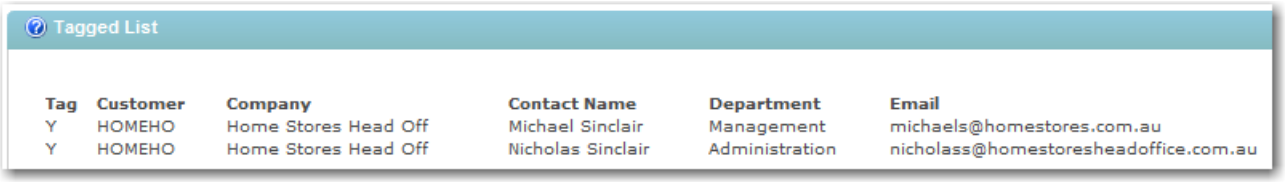
Select the **Tag by Report** option from the Tag Menu and select the report you want. For example, you may want to send an account reminder to customers in 60 or 90 days using the **Customer Aged Trial Balance** report.



Enter the report parameters and press **Generate**. You will notice that a **Tag** check box is selected in the top right of the report screen.



The resulting tagged list of customer will appear in the Tagged List. Remove unwanted recipients by selecting **Filter by Selection** from the Dashboard Menu.



Send your email by selecting **Email** from the New Item Menu.