



# Infor CloudSuite Business Sales/CRM User Guide

Release 9.01.x

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## Contacting Infor

If you have questions about Infor products, go to the Infor Xtreme Support portal.

If we update this document after the product release, we will post the new version on this website. We recommend that you check this website periodically for updated documentation.

If you have comments about Infor documentation, contact [documentation@infor.com](mailto:documentation@infor.com).



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# CRM Overview

CRM is a customer relationship management solution that provides an efficient method for managing the entire sales process within CloudSuite Business, from customer lead origination and sales opportunity tracking through converting prospects to customers and placing the order.

The features in CRM provide an integrated solution between your front and back offices. It delivers productivity gains by streamlining sales and customer service processes, decreasing the cost of sales and cost to serve, and ultimately increasing revenue.

CRM allows you to manage your marketing, sales, order, contact, and customer management activities:

- **Marketing:** Using the Opportunities form, your marketing organization can track all elements of a marketing or sales campaign, including its effectiveness. You can also manage all tasks associated with an opportunity using the Opportunity Tasks form. Use the Competitors form to keep contact information and basic company information of your competitors. Create campaigns with the Campaigns form, and add items to the campaign with the Campaign Items form. Use the Campaign Types and Campaign Statuses forms to add further detail to your campaign.
- **Sales:** Using the Prospects and Leads forms, your sales representatives can assist prospects and customers from initial interest through order placement. They can quickly convert a prospect to a customer. All associated information is automatically transferred to the new customer and opportunity records. They can also organize prospects and customers by Territories. Use the Sales Teams form to create and manage sales teams for customers, prospects, and opportunities. Use the Sales Contact Interactions form to keep track of communications with sales contacts. The Sales Contacts form allows you to keep basic information on your sales contacts. Use the Sales Forecasts form to keep track of sales forecasts and the Add Opportunities form to add opportunities to a sales forecast. Create sales periods with the Sales Periods form. The Prospect Interactions form and Customer Interactions forms allow you to keep track of communications with prospects and customers.
- **Order Management:** The Opportunities form also allows you to track estimate orders assigned to prospects or customers.
- **Customer and Sales Contact Management:** On the Customers form, CRM tab you can maintain territory information, the SIC code, company revenue and number of employees for each customer. You can also cross reference your sales contacts with customers and prospects.

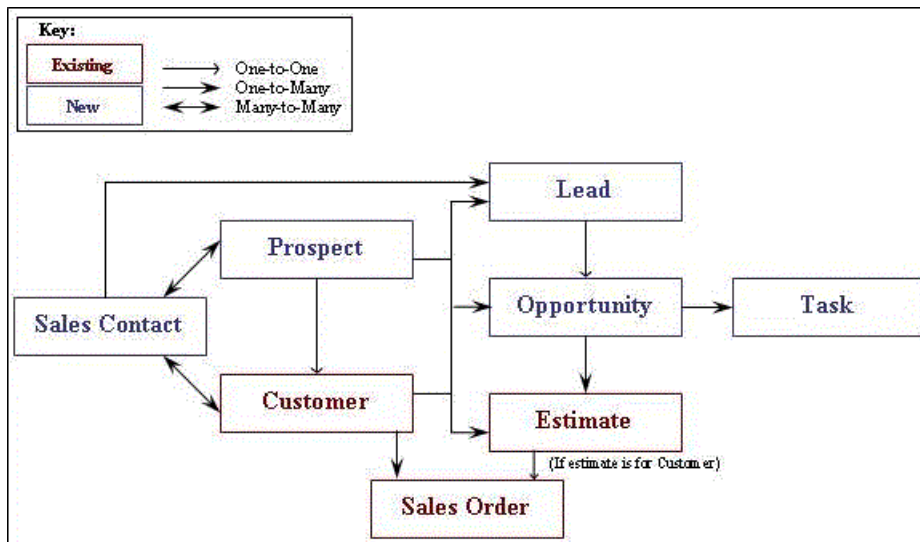
## Licensing

Any user with the CloudSuite BusinessTrans license module can access the CRM forms.

## Technical Points

- When importing/exporting sales contacts from/to Outlook, this is not a synchronization. Records are duplicated if they already exist (in either direction). So, if importing from Outlook, and the contact exists already in CRM, importing it again creates another sales contact record. If exporting to Outlook, if the contact exists already in Outlook, exporting it again creates another Outlook contact.
- When importing/exporting sales contacts from/to Outlook, Outlook must be open. When importing, highlight all contacts in Outlook to be imported. Click the import button to bring over those selected contacts. When exporting, either the selected record in CloudSuite Business or all records will be exported, depending on if you select the Export or Export All button.
- The ability to assign territories is used for tracking purposes only, such as reporting. It does not limit users to only the data in their assigned territories (data is not filtered by territory).
- You can create your own reports with CRM data or export the data to Excel. Your Infor Business Partner or the Infor ICS team can assist with creating reports if this is desired.
- There are pre-defined query forms available under the CRM > Queries folder. These forms allow you to query your campaigns, competitors, sales contacts, sales teams, sales forecasts, prospects, leads, opportunities, and opportunity tasks based on the data of your choice.
- You can generate events against the forms. This can be helpful for things such as managing the progress of opportunities and tasks, following-up on leads or opportunities, etc. For more information on the CloudSuite Business Application Event System, see the *Guide to the Application Event System* on our support site. If needed, your Infor Business Partner or the Infor ICS team can assist with creating events to meet the needs of your company.

The following chart displays how the CRM components are related to each other:





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# Recommended CRM Order of Events

We recommend that you use CRM in a test environment first so that you become familiar with how it works before using it in your live environment.

Order of events:

- 1 Identify the base values for the various fields on the CRM forms. Several of the CRM forms each have dropdown fields for which values need to be defined. Some are required, and some are optional. If possible, the dropdown values should be set up before importing CRM data or entering any data into these forms (with exception to the Customers form/table which most likely already has data). Those forms that have these dropdown values include: Leads, Opportunities, Opportunity Tasks, Prospects, and Customers.

When defining the values, it is important to think about how you will use CRM and how you want to track progress on leads and opportunities, as well as tracking other information such as where the lead or opportunity came from, what was the reason for the win or loss, and what types of tasks might there be when working with an opportunity. You also need to decide if you want to track your data by territory. Your Infor Business Partner or the Infor ICS team can assist with defining these values based on the needs of your organization.

**Note:** Although the system won't prevent you from changing the values later, it may be undesirable as it would invalidate any existing records with those values. Scripts could be written though to update any existing records prior to changing the values.

The values that need to be defined include:

- Lead Statuses (required, Leads form)
  - Opportunity Statuses (required, Opportunities form)
  - Opportunity Sources (optional, Leads and Opportunities forms)
  - Opportunity Stages (optional, Opportunities form)
  - Opportunity Won Reasons (optional, Opportunities form)
  - Opportunity Lost Reasons (optional, Opportunities form)
  - Opportunity Task Types (optional, Opportunity Tasks form)
  - Territories (optional, Customers and Prospects forms)
- 2 Enter/import your sales contacts. You can import contacts from Outlook or set them up manually. If you have the data defined in another database, you may want to create import scripts to import the data. We recommend you contact your Infor Business Partner or Infor ICS to assist with this process.

## Recommended CRM Order of Events

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- 3** Set up any existing prospects and then cross reference them to your sales contacts, using the Prospect Sales Contact Cross References form.
- 4** Cross reference any of your existing customers to the contacts you imported or manually set up. Use the Customer Sales Contact References form to complete this.
- 5** Enter any existing leads, opportunities, opportunity tasks, and quotes that you already have and want to begin tracking. If you need to import these, we recommend you contact your Infor Business Partner or Infor ICS to assist with this process.
- 6** Begin using CRM.

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# About Surcharges

Surcharges allow you to create a more accurate item price by accounting for fluctuating commodity prices. You may apply surcharges to:

- Purchase orders
- Vouchers
- Customer orders
- Invoices

## Surcharge Calculation

An estimate of commodity cost is built into the cost of the item, and is represented by the Base Price field. This formula accounts for market fluctuation, then applies a surcharge based on the amount of the commodity that is contained in the item, as well as a general surcharge factor.

Unit surcharge = (Actual price - Base Price) \* Content Factor \* Surcharge Factor

## Reports/Utilities

Surcharge information is included on these reports:

- Purchase Requisition Report
- Purchase Order Requisitions
- Estimate Response Form Report
- Order Verification Report
- Consolidated Invoicing
- Order Invoicing/Credit Memo



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# Creating and Managing Opportunities

An opportunity is an event with associated tasks for a prospect or customer. Using the CRM Opportunity forms, you can create and track activities that engage prospects and retain customers.

**1** Before you create an opportunity and its associated tasks, set up information in these forms:

- Opportunity Sources
- Opportunity Statuses
- Opportunity Stages
- Opportunity Lost Reasons
- Opportunity Won Reasons
- Opportunity Task Types

**2** On the Opportunities form, select **Actions > New**.

**3** Specify the following information:

- The **Opportunity** number, or leave it blank to cause the system to specify a number when you save the record.
- A customer or a prospect. A territory displays if it has been assigned.
- (optional) A salesperson or contact to the opportunity.
- The initial status of the opportunity from the **Status** field.
- The percentage chance the opportunity will be won in the **Estimated Value**
- The **Projected Close Date**.

**4** Select **Actions > Save** to save the opportunity.

**5** Open the Opportunity Tasks form.

**6** Select **Actions > New**.

**7** Specify the following information:

- A description of the **Task Number**, which is automatically assigned.
- The **Type** of task.
- (optional) The **Status** if it is something other than the default status of **Open**.
- A task **Owner** from the list obtained from the system users.
- The task's **Priority**.
- The **Due Date** for completing the task.
- (optional) The **Mandatory** check box to indicate that the task is required.

- (optional) The completion date.

**8** Select **Actions > Save** to save the opportunity.

**9** The system displays the task creation date in the **Create Date** field, as well as the ID of the person who created the task in the **Created By** field.

**Note:** Throughout the course of the opportunity, you can update the status, stage, percent of success, and completion date. You can also indicate the reason the opportunity was won or lost.

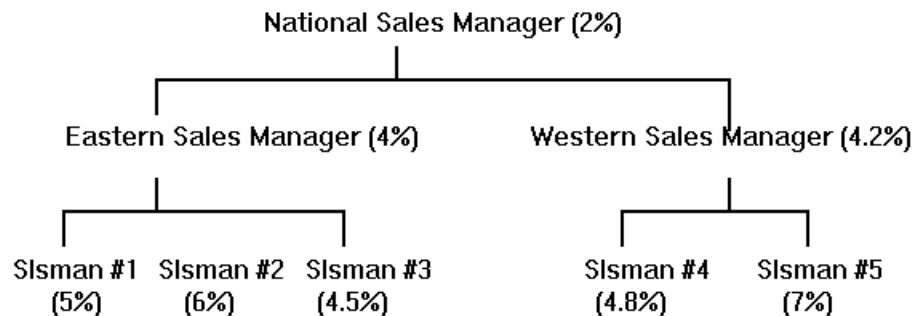
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# Commissions Overview

The system allows you to set up and process various levels of salespersons and their respective commissions based upon these levels. It is possible to apply various commission rates to each salesperson, at each level, with this function. Additionally, commission payments can be calculated on partial as well as full invoice payments.

## Hierarchical Structure

To process commissions using a hierarchical structure, you should understand the structure involved. For example, the following diagram shows a typical salesperson/commission structure.



This diagram shows that the National Sales Manager receives 2% of all invoices generated, the Eastern Sales Manager receives 4% of all invoices generated by the salespersons whom he manages, and the Western Sales Manager receives 4.2% of invoices generated by the salespersons whom he manages. Each of the salespersons receives the indicated percentage of commission.

## Processing and Calculating Commissions

After you have set up all forms used for calculating commissions, the system is ready to process commissions. After customer invoices are posted, the system follows the following rules to calculate the commission amounts due:

When the invoice is posted:

- If the **Commission Due on Payment** check box is selected on the Order Entry Parameters form, the system generates commissions due records only when customer orders are invoiced, and based on what the customer actually pays.
- If **Commission Due on Payment** check box is cleared, the total commission amount due is recorded at this time.

When payment is received from the customer, the system calculates the commission due each salesperson for each invoice as follows:

- The percentage paid of the total invoice is calculated using this formula:  $PP = AP / IT$ . This allows commissions to be calculated on partial payment of invoices, where.

PP = Percentage Paid

AP = Amount of Payment

IT = Invoice Total

- The percentage of commission due to each salesperson is determined using the following formula:  $PCD = PPI * SCP$ .

PCD = Percentage of Commission Due

PPI = Percentage Paid of Invoice

SCP = Salesperson's Commission percent

- The commission amount due to each salesperson is determined using this formula:  $CAD = PCD * IT$

CAD = Commission Amount Due

PCD = Percentage of Commission

IT = Invoice Total

Because the system allows various levels of salespersons, a special process is followed to create the commission due listed above for each salesperson. In order to process the commission due, the commissions function performs these steps, in order:

- The system refers to the Salespersons form for the salesperson listed on the invoice and calculates the percentage and commission due to that salesperson (as shown above).
- Next, the system refers to the **Sales Manager** field in the Salespersons form, and calculates the percentage due for the sales manager (if the **Sales Manager** field contains a salesperson's initials.)
- If a number exists in the **Sales Manager** field of the Salespersons form, the commission is calculated for that manager.

This process continues higher up the chain of command until a blank **Sales Manager** field is encountered. This allows commission payments to be given to a salesperson, as well as all managers higher in the hierarchy for any invoice.

### Commission Distributions for an Order

Use the Salesperson Commission Distribution form to assign multiple sales representatives to a single customer order or line item. A sales commission record is generated for each distribution that you enter.

Any commission amount that you specify with a blank sequence or line number is applied to all lines of the order. If, in addition to this blank sequence record, you add a record for a specific line of the order, both commission rates are applied to that line.

### Commissions to Employees

Salespersons who are considered employees of the company (indicated by the **Outside** check box being cleared on the Salespersons form) are paid commissions based upon their Employees record.



When payroll is processed and it is time to pay the salesperson, depending on whether the salesperson is paid biweekly, weekly, monthly, or whatever, the commissions are totaled and paid.

When the Salespersons file is set up, the **Deductions & Earnings Code** under which the commissions are reported is recorded for each salesperson. When payroll is generated, the system selects all commission due records that contain information relating to the invoice number, salesperson, and commission amount due for each customer payment processed.

The system then totals these records, and displays the total commission paid in the specified **Deductions & Earnings Code** field indicated for each salesperson. This commission amount is paid when payroll checks are printed.

### **Commissions to Vendors**

Salespersons who are not considered employees of the company (indicated by the **Outside** check box on the Salespersons form being selected) are paid commission when accounts payable payment processing occurs. This type of salesperson is paid when a commission becomes due (meaning, a Commissions Due record has been created) and payments are processed through Accounts Payable.

Processing commissions for these salespersons works the same as for employees of the company. The system looks at commission due records for the salesperson (vendor), calculates the total commission due to the salesperson, and that amount is then paid when disbursements are generated.

### **Commissions Due**

Commission due records are not deleted when commissions are paid, but rather are marked as paid. Therefore, by using the Commissions Due form, you can adjust commissions that are due.

### **Altering Calculation Methods**

Currently, commission percents are calculated both by salesperson and product code, as defined in the Commission Table Maintenance form. However, the commission calculations may be customized to fit the needs of the company.



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## Creating Sales Forecasts

- 1 On the Sales Forecasts form, select **Actions > New**.
- 2 The **Salesperson** field toward the top of the form defaults to the current salesperson (you).
- 3 Choose the sales period.
- 4 Save the record.
- 5 After you save the record, the **Add Opportunities** button is displayed on the form. If you click this button, the Opportunities form opens, allowing you to add opportunities to the sales forecast for the current salesperson (if opportunities exist for the salesperson).



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# Setting Up Surcharges

To implement surcharges, perform these steps:

- 1 On the Chart of Accounts form, create a Surcharge and, if necessary, Surcharge in Process account.
- 2 On the Accounts Payable Parameters and Accounts Receivable Parameters forms, accept the default surcharge factor of 1.00, or specify a new factor.
- 3 Specify the surcharge account(s) on the A/P Parameters, A/R Parameters, Distribution Accounts, and End User Types forms.
- 4 On the Tax Systems form, specify the surcharge tax code label and description.
- 5 On the Tax Codes form, use the **Include Surcharge** field to specify the tax codes that will include surcharges when determining the basis for tax charges.
- 6 On the Item Contents form, create records for each commodity for which you might apply surcharges.
- 7 On the Item Content Exchanges form, create a record for each commodities exchange service from which you might buy your item contents.
- 8 On the Item Content Prices form, create records to track the price fluctuations of each item content, and each exchange.
- 9 On the Items form, specify that an item contains some amount of item content by selecting the **Includes Item Content** field on the **Sales** tab.
- 10 On the Items form, click the **Item Content** button to open the Item Content References form.
- 11 Define the item content reference. This will apply to all uses of this item.
- 12 Specify the effective date, base price, and content factor for each item content contained within the referenced item.
- 13 (Optional) To specify a unique reference for an individual customer, vendor, contract, or order line, click the **Item Content** button on those forms. References created this way will take precedence over the references created for the item in general.
- 14 On the Customer Surcharge Rules and Vendor Surcharge Rules forms, create a record for each customer/exchange or vendor/exchange combination.
- 15 For each record, define the price method, offset intervals (where applicable), and start/end date times (where applicable).



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# Setting Up a Rebate Program

To setup a rebate program for your customers, perform these steps:

- 1 Open the Price Promotions and Rebates form.
- 2 Specify a promotion code and a description for the program.
- 3 In the **Promotion Type** field, select **Rebate**.
- 4 Set effective and expiration dates for the program.
- 5 Optionally, you can set additional criteria to narrow the promotion. For example, you can limit the program to apply to only order lines placed by a particular salesperson and/or for a particular corporate customer and/or for a specific item. You can set as many or as few limitations as necessary. To leave the promotion open for all customer order lines within the promotion date range, do not specify any limitations.
- 6 On the Accounts Receivable Parameters form, specify the deferred revenue account and related unit codes to record deferred revenue rebate credits.
- 7 On the Price Promotions and Rebates form, **Rebates** tab, specify the rebate fair value. Select **Rate** or **Amount** for the type and then specify the value for that type in **Rebate Fair Value**.
- 8 In **Rebate Redemption Rate**, specify the proportion of the rebate fair value that is expected to be redeemed.
- 9 In **Rebate Number of Periods**, optionally, you can specify the number of accounting periods following the invoice date during which the rebate credit can be redeemed. Accept the default value of zero if the rebate credits should not have an expiration date.
- 10 In **Deferred Revenue Acct** , accept the default account number or change it if necessary.
- 11 Save the record.





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## Setting Up Commission Information

To process salesperson commissions in a hierarchical structure, you must set up several codes and parameters based on salesperson classification, commission percentage, and the selected commission payment plan. The following steps identify what to set up for processing salesperson commissions in a hierarchical structure. If you do not use a hierarchical structure, complete these steps, but leave the **Sales Manager** field of the Salespersons form blank.

- 1 Create geographical, positional, or other classifications for salespersons using the Salesperson Classifications form.
- 2 Enter all salespersons into the Salespersons form.
- 3 Enter commission values for salespersons, using the Commissions Table Maintenance form.
- 4 If the commission is to be paid when the invoice is paid or after invoicing, select the **Commission Due on Payment** check box on the Order Entry Parameters form.



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# Setting Up Promotion Pricing

To setup a promotion pricing program for your customers, perform these steps:

- 1 Open the Price Promotions and Rebates form.
- 2 On the Price Promotions and Rebates form, specify a promotion code and a description for the program.
- 3 In the **Promotion Type** field, select **Promotion**.
  - To create a program that creates future payment credits for the customer, select **Rebate**.
- 4 Set effective and expiration dates for the program.
- 5 Optionally, you can set additional criteria to narrow the promotion. For example, you can limit the program to apply to only order lines placed by a particular salesperson and/or for a particular corporate customer and/or for a specific item. You can set as many or as few limitations as necessary. To leave the promotion open for all customer order lines within the promotion date range, do not specify any limitations.
- 6 On the **Promotions** tab, do one of the following:
  - To offer an item price discount, select **Percent** or **Amount** for the discount type and then specify the value for that type in **Promotion Discount**. For example, you could specify a discount amount of 10.00 or a discount percent of 10.
  - To offer a set price, specify that price in **Fixed Price**.
  - To offer free items with the purchase of one or more items, specify the required number of items to buy in **Buy Qty Multiple** and the number of free items in **Get Free Qty Multiple**.
- 7 With each of the promotion options above, you can optionally define these additional criteria to qualify customer order lines for the promotion:
  - **Min Net Price**: Specify the minimum extended price value required for the order line to qualify. For example, you can require that customers spend at least \$100 to get the promotion pricing.
  - **Min Qty Ordered**: Specify the minimum quantity that must be ordered for the order line to qualify. For example, you can require that customers order at least 10 of an item to get the promotion pricing.
  - **Max Promotion Disc Amt**: Specify the aggregate total amount available for the program. For example, you can limit the promotion to a total cost to your company of \$1000.
  - **Max Promotion Qty To Disc**: Specify the total number of items available for the program. For example, you can limit the promotion to 500 items. This setting can be used only if you have set up the program for a specific item.

- 8 Save the record.

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## Process Indicator Example

In the UK, you might use one of these process indicator codes:

- **0**: The value of the goods and related costs; even if you have not invoiced them or been paid yet.
- **2**: You did not handle the goods yourself; your supplier sent them directly to your customer. This is known as triangulation.
- **3**: The value of the services you have provided where the place of supply is the customer's country and the services are subject to a reverse charge.
- **Blank**: The goods are being sent for repair in another EU country. (Code 3 is reflected in the EU Sales List Report and the EU VAT Report.)

Consult your local tax office for information about the appropriate code to enter in this field.



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# Sending Mass Communications

## Sending a Communication to a Group of Contacts

You can use the Communication Wizard to send a communication to a group of contacts. For additional information about MailMerge and CloudSuite Business, see "Inserting MailMerge Fields for CloudSuite Business Contacts" on page 34. That topic applies both to communications that use a template and those that do not use a template.

Before you can send communication to a group of customers, perform these preliminary steps:

- 1 Decide on the type of communication you plan to send: News, Promotion, or Other Communication.
- 2 Decide on the method of communication you plan to send: Fax, Email, or Letter.

**Note:** If you plan to communicate with Portal users, only email is available, and the rest of these steps do not apply. Continue to the "Sending an Email to Portal Users" on page 31 process.

- 3 Use the Contact Groups form to create a group of contacts for this communication, if no existing group meets your needs.
- 4 Ensure that the contacts to whom you want to send the communication are signed up to accept that type and method of communication from you. Go to the Sales Contacts form, **Preferences** tab, and verify the settings for each contact.
- 5 Open the Communication Wizard form to begin creating communications. See these topics for more information:
  - "Sending an Email to Portal Users" on page 31
  - "Sending a Fax or Letter to a Group of Contacts" on page 32
  - "Sending an Email Blast" on page 33
  - "Sending an Email Blast without a Template" on page 33

## Sending an Email to Portal Users

To send an email to Portal users, perform these steps:

- 1 Determine the type of communication you plan to send: News, Promotion, or Other Communication.

- 2 In the Communication Wizard, select **Portal Users**. The **Communication Method** defaults to **Email**. The list of portal users who will receive the communication is based on those who have subscribed to the publication SpecialPromotionsAnnouncements through their portal profile.
- 3 Type your message in the Message body. Templates and **MailMerge** fields are not available for use with Portal communications.
- 4 Specify the **Subject**.
- 5 Click **Next**.
- 6 Select an **Interaction Topic** and, optionally, specify a note about the interaction. The **Type** defaults to **Email**.
- 7 Click **Finish**. The system sends the email to portal users through the Application Event System.

## Sending a Fax or Letter to a Group of Contacts

- 1 To send a fax or letter to a group of contacts, perform these steps:
- 2 If you are using a template, ensure that you have created a Word template appropriate for this communication, with **MailMerge** fields embedded. See "Inserting MailMerge Fields for CloudSuite Business Contacts" on page 34.
- 3 In the Communication Wizard, specify the **Communication Type**.
- 4 Specify the **Communication Method** as **Fax** or **Letter**.
- 5 Select the group you defined on the Contact Groups form.
- 6 Click **Next**. The contacts from the group who have specified that they want to receive this type and method of communication are listed.
- 7 Select the contacts that you want to include in this communication.
- 8 Click **Browse** and select the template you defined in step 2.
- 9 The system responds by creating a .csv file that contains one record for each contact, with the available **MailMerge** field values for that contact. You are prompted to open the file. If you want to verify the values, click **Yes**. Close the file when you are finished.
- 10 The text from the template, including the **MailMerge** fields, is displayed in the **Message** field. You cannot edit the text.
- 11 Click **Next**. A Microsoft Word file is created that includes one copy of the merged document for each contact.
- 12 Print the document.
- 13 Click **Finish** to close the Communication Wizard.
- 14 Fax or mail the printed documents to the individual contacts.



## Sending an Email Blast

If you specify a Microsoft Word template (using either of the file extensions .docx or .dotx) and use MailMerge, your email is sent through your installation of Microsoft Outlook. The email is created as an HTML document with merge fields embedded in it. To use a MailMerge Template with HTML Formatting to send an email blast, perform these steps:

- 1 If you want to send these email blasts from a special Marketing email address rather than from your personal address, add the Marketing email account to your Outlook Profile and temporarily set that profile as the default.
- 2 Ensure that you have created a Word template appropriate for this communication, with **MailMerge** fields embedded. See "Inserting MailMerge Fields for Contacts in a Word Template" on page 34.
- 3 In the Communication Wizard, specify the **Communication Type**.
- 4 Specify the **Communication Method** as **Email**.
- 5 Select the group you defined on the Contact Groups form.
- 6 Click **Next**. The contacts from the group who have specified that they want to receive this type and method of communication are listed.
- 7 Select the contacts from the group to be included in this communication and click **Next**.
- 8 Click **Browse** and select the template you defined in step 2.
- 9 The system responds by creating a .csv file that contains one record for each contact, with the available **MailMerge** field values for that contact. You are prompted to open the file. If you want to verify the values, click **Yes**. Close the file when you are finished.
- 10 The text from the template, including the **MailMerge** fields, is displayed in the **Message** field. Do not edit the Message text in the form.
- 11 Specify a Subject for the communication.
- 12 Click **Next**.
- 13 The Email Blast populates the Word template with data from your selected contacts and emails each record separately from your Outlook profile. Sent e-mails can be viewed in your Outlook Sent Mail folder
- 14 In the Communication Wizard, log information about the communication. See the field descriptions for more information.
- 15 Click **Finish** to save the log information.

## Sending an Email Blast without a Template

You can send an email that is either basic text formatting or HTML, typed directly into the Communication Wizard form, and not using a template. Blast emails that do not use a template are sent out through the application event system.

To set up this type of email, perform these steps:

- 1 If you want to type HTML formatted text into the Communication Wizard form, ensure that these event handlers are updated to allow HTML:

- In the Event Handlers form, select **GenericSendEmail**. Click **Event Actions**. Click **Edit Parameters**. Ensure that **Body is in HTML Format** is selected and click **OK**.
  - Return to Event Handlers and repeat the above step for the GenericNotify and InteractionEmail events.
- 2 In the Communication Wizard, specify the **Communication Type**.
  - 3 Specify the **Communication Method** as **Email**.
  - 4 Select the group you defined on the Contact Groups form.
  - 5 Click **Next**. The contacts from the group who have specified that they want to receive this type and method of communication are listed.
  - 6 Select the contacts from the group to be included in this communication and click **Next**.
  - 7 Type a Subject and enter your text in the **Message** field. You can include CloudSuite Business MailMerge fields (see "Inserting MailMerge Fields for Contacts in a Word Template" on page 34). If HTML is allowed (see step 1), you can type in basic HTML formatting such as **<b>text</b>** in your message text.
  - 8 Click **Next**.
  - 9 In the Communication Wizard, log information about the communication. See the field descriptions for more information.
  - 10 Click **Finish** to save the information.

## Inserting MailMerge Fields for Contacts in a Word Template

These contact fields are available for use in MailMerge documents:

```
first_name
middle_initial
last_name
suffix
job_title
address_1
address_2
address_3
address_4
city
state
zip
country
business_phone
mobile_phone
email
fax
```

You cannot paste or type these fields into a template. They must be added using the MailMerge functionality in Microsoft Word. In Microsoft Word 2010, these are the steps to add the fields:

- 1 Open a new document.
- 2 Click **Insert > Quick Parts > Field**.
- 3 Select **MergeField** from the list of field names.
- 4 Under field properties, type in the CloudSuite Business field name from the list, for example first\_name. (Word will place the field inside special characters.)
- 5 Click **OK** to insert the merge field.

In other versions of Word, the steps might be different.

EXAMPLE: An example template that uses the CloudSuite Business MailMerge fields is available through the knowledge base on our Support site. Search for a KB article containing the text "MailMerge Email Merge Template".

## Inserting MailMerge Fields for Contacts in the Communication Wizard Message Area

These contact fields are available for use in MailMerge documents:

```
first_name
middle_initial
last_name
suffix
job_title
address_1
address_2
address_3
address_4
city
state
zip
country
business_phone
mobile_phone
email
fax
```

If you are creating a simple email without a template, type the text of your message into the Message field in the Communication Wizard. When you reach a point where you want to insert a MailMerge field, follow these steps:

- 1 Select a field in the **Merge Field** dropdown. A variable representing this selection is placed on the clipboard.

- 2 Place the cursor in the Message box.
- 3 Press **Ctrl + V** to insert the variable at the cursor location.
- 4 Continue composing the message.
- 5 When the communication is sent, all variables you placed are replaced with the appropriate data.

EXAMPLE: You are sending an email to two prospects, Joe and Jane, and you want to personalize the message. Select First Name in the **Merge Field** dropdown, then paste the variable into the message opening. The message now begins, "Dear {@FirstName}". When the message is sent, the variable is replaced and the messages read, "Dear Joe" and "Dear Jane."

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# CRM Scenarios

## CRM Scenario 1

To record a customer call about your new product line, perform these steps:

- 1 Create a new contact record on the Sales Contacts form. Be sure to set up the preferences on the **Preferences** tab.
- 2 Synchronize with Outlook Contact. For contacts, tasks, and appointments to automatically sync in or sync out, the **Auto Sync Out** check box must be selected during the initial setup of the Outlook add-in. This is part of the installation for the add-in.
- 3 Add yourself to a team on the Sales Teams form.
- 4 Create a new prospect on the Prospects form.
- 5 On the Prospects form, click the **Sales Contacts X-Ref** button to open the Prospect Sales Contact Cross References form.
- 6 On the Prospect Sales Contact Cross References form, select yourself as the contact. Save. You should now see yourself listed as a contact on the Prospects form.
- 7 On the Sales Contact Interactions form, record the content of your phone call. You can also send an email from this form. Change the status on this form to Complete.

## CRM Scenario 2

To record a customer that is interested in getting more information about your new product line, perform these steps:

- 1 On the Lead Statuses form, either create a new lead status or use an existing one.
- 2 On the Leads form, create a new lead tied to both the prospect and contact.
- 3 On the Leads form, click the **Notes** button in the toolbar. Add any relevant notes.
- 4 On the Prospect Interactions form, set a follow-up date.
- 5 Run the Prospect Interactions Report.

## CRM Scenario 3

To record a customer meeting that went well and has turned into a sales opportunity, perform these steps:

- 1 On the Prospect Interactions form, record the meeting interaction.
- 2 Create opportunity from lead. On the Leads form, click the **Opportunities** button. The Opportunities form is displayed.
- 3 On the Opportunities form, click the **Tasks** button. The Opportunity Tasks form is displayed.
- 4 Use the Opportunity Tasks form to record steps that have been agreed upon from the meeting.

Examples:

- Discovery meeting
  - Internal Review
  - Follow up demonstration
  - Put together proposal
  - Close deal
- 5 Tie opportunity to estimate for proposal. On the Opportunities form, click the **Estimates** button. The Estimates form is displayed.
  - 6 On the Estimates form, click the **Estimate Lines** button to open the Estimate Lines form so that you can add lines.
  - 7 On the Estimate Response Form Report form, ensure that **Print Price** is selected. Print the report.
  - 8 On the Competitors form, create a new competitor or use an existing one.
  - 9 On the Opportunity Competitor Cross References form, add a record. Competitor now appears on the **Competitors** tab on the Opportunities form for that opportunity.
  - 10 On the Opportunity Member Cross References form, delete or add sales people so that only those sales people working on this opportunity are listed. The sales team members are now visible on the **Team Members** tab on the Opportunities form for that opportunity.

## CRM Scenario 4

To create a forecast of opportunities, perform these steps:

- 1 Open the Sales Forecasts form and select the proper sales period and salesperson.
- 2 On the Sales Forecasts form, change the status to Submitted.

## CRM Scenario 5

To record a deal that has been won, perform these steps:

- 1 On the Opportunity Won Reasons form, add a new reason for the win, or plan to use one that exists.
- 2 On the Opportunities form, set the **Reason Won** field to the proper reason for the proper opportunity.
- 3 On the Prospects form, click the **Move To Customer** button for the proper prospect. The Move Prospect To Customer form is displayed.
- 4 On the Move Prospect To Customer form, select the proper bank code and click **Process**.
- 5 Check the Customers form to ensure the customer record has been created.

## CRM Scenario 6

To create and manage a campaign, perform these steps:

- 1 Create Sales Contact Group. On the Sales Contact Groups form, add your contact to the Trade Show group.
- 2 On the Campaigns form, create the campaign.
- 3 On the Campaigns form, click the **Add Sales Contacts** button. The Add Sales Contacts form is displayed.
- 4 On the Add Sales Contacts form, select **Sales Contact Group** in the **Source** field.
- 5 Click the Filter In Place button so that you see **Trade Show** in the **Group Name** column.
- 6 With the Trade Show group name selected, click **Next**.
- 7 Select the contacts you want to include and click **Finish**. You can now see the contacts on the **Contacts** tab of the Campaigns form.
- 8 On the Campaigns form, click the **Campaign Items** button. The Campaign Items form is displayed.
- 9 On the Campaign Items form, select all the items for your campaign. The items now appear on the **Campaign Items** tab of the Campaigns form.
- 10 On the Campaigns form, click the **Send Communications** button. The Communication Wizard is displayed.
- 11 On the Communication Wizard form, set the **Communication Type** to **Promotion** and the **Communication Method** to **Email**.
- 12 Click **Next**. Select your sales contacts for the communication.
- 13 Click **Next**. Create your template.
- 14 Click **Next**. Select the topic, the type, provide any notes you want, and select any other options you want.
- 15 Click **Finish**. Communications now appear on the **Communications** tab on the Campaigns form.
- 16 On the Campaigns form, click the **Leads** button. The Leads form is displayed.
- 17 Create the lead and save. The lead now appears on the **Leads** tab of the Campaigns form.

