



Customer Relationship  
Management

## **FSI User Manual**

**Version 14.1**

# Notices

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# Preface

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For details, see the following topics:

- [About this documentation](#)
- [Notation conventions](#)
- [Aurea global support](#)

## About this documentation

This guide is part of the documentation set for Aurea CRM.

## Notation conventions

This document uses the following notation conventions:

Convention	Meaning
Fixed-width	Fixed-width font indicates code, path names, file names, environment variable names, parameter names, command names, machine names, URLs.
<b>Bold Fixed-width</b>	<b>Bold Fixed-width</b> font is used to indicate user input or to emphasize certain lines of code.
<i>Italic Fixed-width</i>	<i>Italic Fixed-width</i> font indicates a placeholder for which you must supply a value.
<b>Bold Sans serif</b>	<b>Bold sans serif</b> typeface indicates the names of graphic user interface elements such as dialog boxes, buttons, and fields.
<i>Italic serif</i>	In text, <i>italic serif</i> typeface indicates the first use of an important term. The term is defined in the glossary.
Underlined	Underlined text in command lines and parameter descriptions indicate that you only have to enter the underlined part of the command or parameter name. For example, if you use the <u>-LOGFILE</u> parameter in a command, you only need to enter <code>-LOGF</code> .
[ ]	Brackets enclose optional arguments.
{ a   b   c }	Braces enclose two or more items. You can specify only one of the enclosed items. Vertical bars represent OR separators. For example, you can specify a or b or c.

---

Convention	Meaning
...	Three consecutive periods indicate that you can repeat the immediately previous item. In code examples, they can be horizontal or vertical to indicate omissions.
<b>Menu &gt; Choice</b>	An angle bracket between two menu items indicates that you should choose an item from a menu. For example, the notation <b>File &gt; &gt; Exit</b> means: "Open the <b>File</b> menu and choose <b>Exit</b> ."
>>	Links to related information in other chapters or documents are indicated using the >> symbol.

## Aurea global support

If you encounter a problem while using an Aurea product or require assistance with downloading the software or upgrading a product release, please open a ticket on [Aurea Support Central](#). Preferably, search the articles on the [Aurea Knowledge Base](#) for solutions to your issues before opening a ticket.

Information about the support organization is available on Support Central. The product documentation is available at <https://help.aurea.com/crm/#>.

For information about purchasing an upgrade or professional services, contact your account executive. If you do not know who your account executive is, or for other queries, [contact us](#) through our [website](#).



# 1

## General Functions

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### Aurea CRM web

Aurea CRM web is a web-based application that accesses the Aurea CRM database and that include a large number of standard CRM processes. Employees can use Aurea CRM to manage customer-related activities, search for and edit their contact persons and check current revenues. Aurea CRM is a fully-fledged CRM solution. The data displayed by the system depends on your role. Access rights are defined by your administrator.

Aurea CRM web's user interface is easy to use. This document provides an overview of the design and the basic function in Aurea CRM web.

Aurea CRM web's interface is fully customizable and can be adapted to meet your requirements by your administrator. For example, info areas can be added, tabs can be renamed etc. As a result, the screenshots in this manual may differ from your version.

Aurea CRM web can be customized to meet your individual requirements (e.g. info areas can be added and the names of tabs can be changed), therefore, examples in this manual may differ from your own interface, >> *CRM.designer Manual*.

Aurea CRM web allows additional data sources to be linked to the Aurea CRM web user interface, e.g. your local Intranet.

This manual contains a description of the user interface's key elements, as well as descriptions of key functions such as searching, entering data and configuring user-specific settings.

---

**Note:** The online user manual accessible in Aurea CRM web only covers the basics. For more detailed information on functions, processes and info areas, refer to the product-specific manuals. Manuals can be downloaded from the Aurea support site at <https://support.aurea.com>.

---

### Login

You can access data in Aurea CRM according to your user rights. You need to log on with your user name and password. You can change your password later, >> [Changing Passwords](#) on page 59.

**Note:** Your administrator can define that your Windows login (user name and password) also apply to Aurea CRM web, in which case you do not need to log in to Aurea CRM web. This setting is especially useful in conjunction with CRM.phone.

---

## Selecting Your Language

You can choose the language version from the login screen. The application is then started in the selected language. German and English are supported out of the box.

---

**Note:** Your administrator can assign a default language which is used if you do not select a language when logging on to Aurea CRM web.

---

## Starting Aurea CRM web

You can access data in Aurea CRM according to your user rights. You need to log on with your user name and password. You can change your password later, >> [Changing Passwords](#) on page 59.

---

**Note:** Your administrator can define that your Windows login (user name and password) also apply to Aurea CRM web, in which case you do not need to log in to Aurea CRM web. This setting is especially useful in conjunction with CRM.phone.

---

To start Aurea CRM web:

1. Enter the address (URL) of Aurea CRM in your browser.
- 

**Note:** Please ask your administrator for the correct URL of the Aurea CRM server.

---

The **Login** page is displayed.



---

**Note:** The type of Aurea CRM installation and version number is visible on the bottom left of the page. The screenshot above shows that it is an Enterprise edition installation.

---

2. Enter your user name and password.
3. Click on **More Options** to select a different language.

---

**Note:** Your administrator can determine that the **More Options** button is not displayed.

---

4. Click on **Log In**.  
Your personal start page is displayed.

## Selecting Roles

Your administrator can define roles and assign specific access rights to them, >> [Roles and CRM Processes](#) on page 17. Your administrator can also determine whether you can select which roles to log in with or whether your roles are fixed.

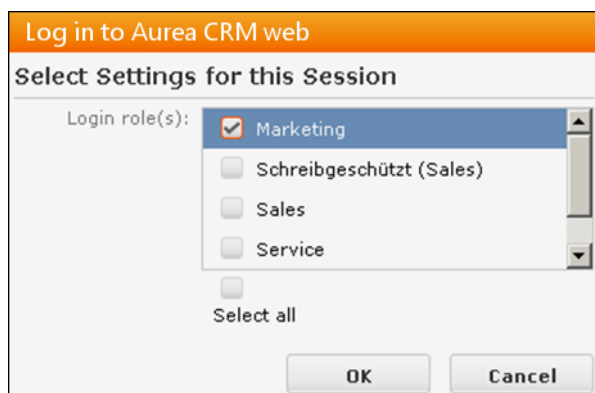
To select a role:

1. Click on **More Options** on the **Login** page.  
The extended login page is displayed.



2. Enable **Select roles** and click on **Log In**.

The dialog used to select your roles is displayed.



3. Select the role(s) you want to log in with. You can select multiple roles.
4. Click on **OK** to log on.

---

**Note:** If single sign-on is enabled on your system (i.e. you are automatically logged on based on your Windows login), your administrator is responsible for defining which role(s) you are logged on with. Roles can also be specified in links. If a user clicks on a link that includes a specific role, the user is logged on the system using that role.

---

## Switching between Telephone Profiles

If you also have access to CRM.phone, you can switch between profiles if several profiles have been defined for you. The selected profile is only active for the current session; next time you log on to Aurea CRM web, your default profile will be used again.

The name of the telephone profile in use is displayed in the system information, >> [System Information](#) on page 59.

To change your telephone profile:

1. Click on **More Options** on the **Login** page.

Further options are displayed.


Enable the **Change telephone profile** check box.

2. Enter your user name and password.
3. Click on **Log In**.

The **Select Settings for this Session** dialog box is displayed.

4. Select the desired profile from the **Telephone Profile** drop-down list. By default, **Do not show phone toolbar** is selected.
5. Click on **OK**.
6. Aurea CRM web is started and CRM.phone uses the selected profile.

## Logging Out

For security reasons, always exit Aurea CRM web by clicking on  and selecting **Log Out** from the menu.

The login screen is then displayed again.

## Roles and CRM Processes

Depending on their current tasks, employees often assume different roles, e.g. working as a member of the sales team in some cases, and as a member of the support team in others.

A member of the sales team may require access to data that provide details on the probability of selling a particular product to a particular customer, in order to coordinate sales activities. A member of the support team requires information on service agreements etc. For this reason, the user interface (e.g. available menu options) differs for each role, as does the data displayed.

Your administrator is responsible for defining roles that are used in your company, and assigns the necessary CRM processes to the roles that require them.

The role(s) you require to complete your tasks are then assigned to you. If you have been assigned to several roles (e.g. the head of marketing requires access to marketing data, as well as other data only available to management), you can decide which role(s) to log on to the system with (provided you have not been assigned fixed roles), >> [Selecting Roles](#) on page 15.

Depending on your current role, the CRM processes assigned to the role and the assigned rights you can execute various functions:

- Your role may grant you the right to add new activities or edit existing ones, for example.
- If you are not permitted to execute a particular function, the corresponding buttons or menu options are unavailable.
- If your role only grants read access to certain info areas, you will be unable to edit data in these areas.

---

**Note:** Certain administrative functions can also be assigned to user roles. These additional functions are **not** described in this manual. For more details, >> *Aurea CRM web Administrator Guide* and *CRM.core Administrator Guide*.

---

### Example:

- Should you try to access an activity record that is a child record of an info area to which you have not been granted access, your role may determine that you cannot edit the activity. For example, you may need to add activities for your colleagues in the field as part of your duties. Depending on your role, you might only be able to view activities added by a service rep for a contact person in a ticket, even though you can normally also edit activities. In such cases, you also only have read access to all the activity's related areas as well.

## Info Areas

The areas used to collect data are called info areas in Aurea CRM. Info areas correspond to a table in the database.

Wherever an info area record is displayed in Aurea CRM web, your administrator can determine that data from related info areas is displayed in both masks and lists.

Info areas can be independent (i.e. have no parent info areas, such as the **Company** info area) or be a child of another info area. Records in child info areas must always be added to a record in the parent info area, e.g. an activity must always be added for either a person or company, >> [Adding Records](#) on page 74.

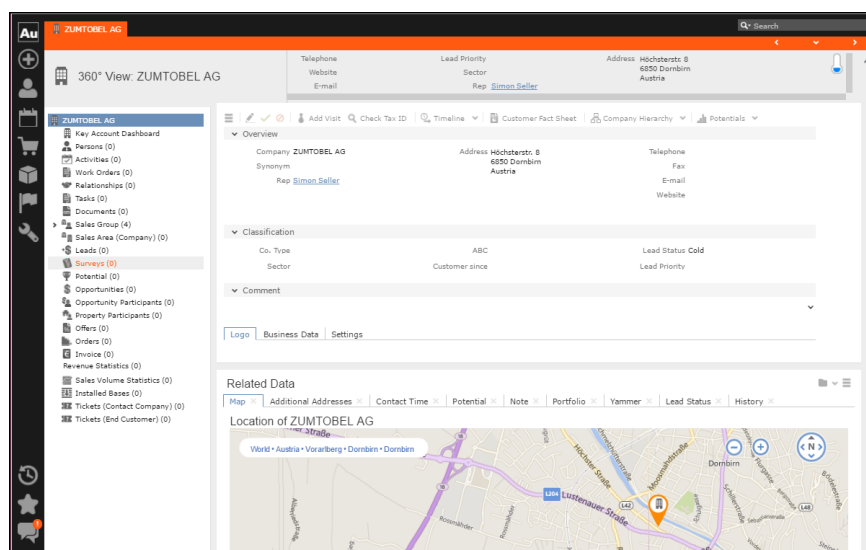
## User Interface

Your administrator can define the appearance of your user interface. Access can be denied to menu entries, queries can be predefined and much more. Some of the options available to you depend on your access rights. For example, your administrator can determine that you cannot add new records, in which case the appropriate menu options are unavailable. If you cannot add records, an appropriate message is displayed if you click the **+** (**New**) button.

## Areas

The Aurea CRM web user interface consists of:

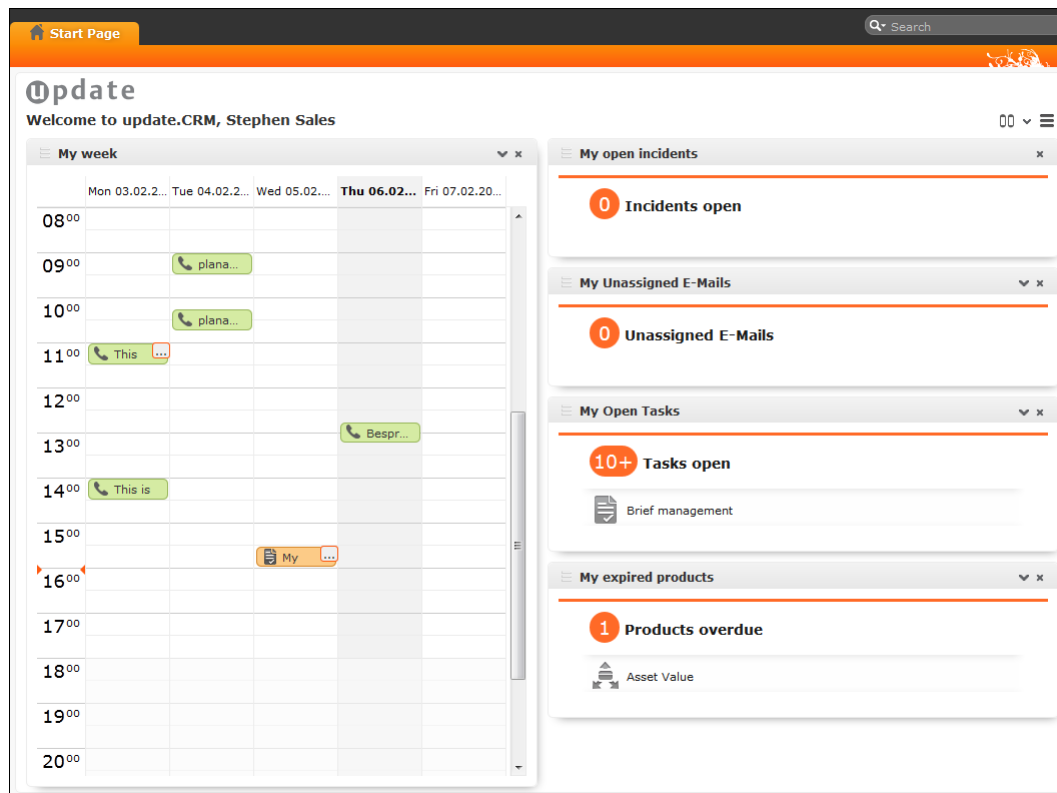
- The sidebar (on the left)
- The working area (to the right)



## Start Page

Your start page is displayed once you have logged on. Your start page provides you with an overview of the most important information required for your work.

The following screenshot shows the default start page for sales reps:



The start page's content depends on your current role (e.g. the start page for marketing employees is different from that for service technicians).

You can customize the layout of your start page. Drag an area to the desired position and release the mouse button. Click on **x** to close an area. You can determine which areas are displayed and how many columns each area spans, >> [Changing the Order of Elements on the Start Pages and in Related Data](#) on page 38.

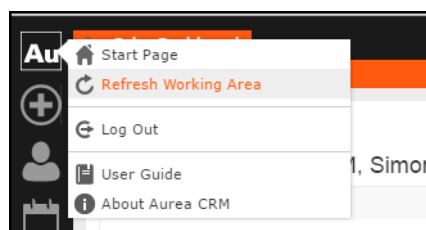
## Sidebar

The sidebar is displayed on the left of the screen. Use the sidebar to access data in the various info areas, execute functions and processes, define settings, configure your favorites, view system messages etc.

## Aurea CRM Menu

The following options are available in the Aurea CRM menu(AUREA CONFIDENTIAL




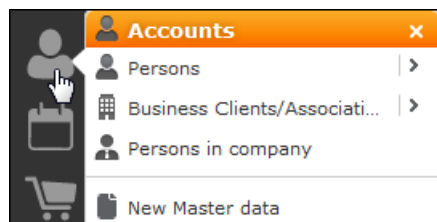


- **Start Page:** Switches to Aurea CRM web's start page.
- **Refresh Working Area:** Refreshes the current screen.
- **Log Out:** Closes Aurea CRM web. For security reasons, always exit Aurea CRM web using this option.
- **User Guide:** Opens the user manual.
- **About Aurea CRM:** Displays information such as the version number etc.
- **Affiliation View:** This option is available if your administrator has granted access to the affiliation view. For more information on the affiliation view, refer to your product-specific manual.

## Navigation

Navigation icons are displayed in the sidebar below the Aurea CRM menu.

Each menu is accessible by clicking on its icon (e.g.  for the **Accounts** menu). Click on the icon and select the desired option:



## History

Use the **History** section to quickly access the records and pages you have recently viewed.

---

**Note:** The history is only saved if you log out using the **Log Out** option in the Aurea CRM menu and the **Save history** option is enabled in your user settings, >> [Handling Tab](#) on page 55. If you simply close your browser, the history is **not** saved.

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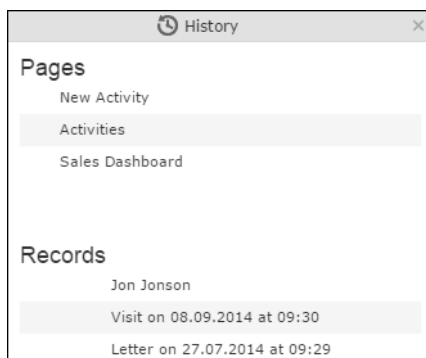
Your administrator defines which entries are displayed in the history:

- Only the records you have accessed, e.g. companies, persons etc.
- Only the functions you have accessed, e.g. search pages, start page, tree view etc.
- Both (default setting)

The history is displayed in the left frame or in the application menu, depending on your configuration, >> [Layout Tab](#) on page 54.

To access an entry in your history:

1. Click on  (**History**).



Your history is divided into two sections:

- The most recently accessed areas are listed at the top.
- The most recently accessed records are listed at the bottom.

2. You can also navigate in the history.

---

**Note:** Depending on your configuration, you can also access the records you have opened recently from the corresponding menu, >> [Editing, Viewing and Deleting records](#) on page 80.

---

## Favorites

You can add the records you require most frequently to your favorites. Your administrator determines which types of records (i.e. which info areas) you can add to your favorites.

Quick links are also displayed here, >> [Customizing Quick Links](#) on page 24.

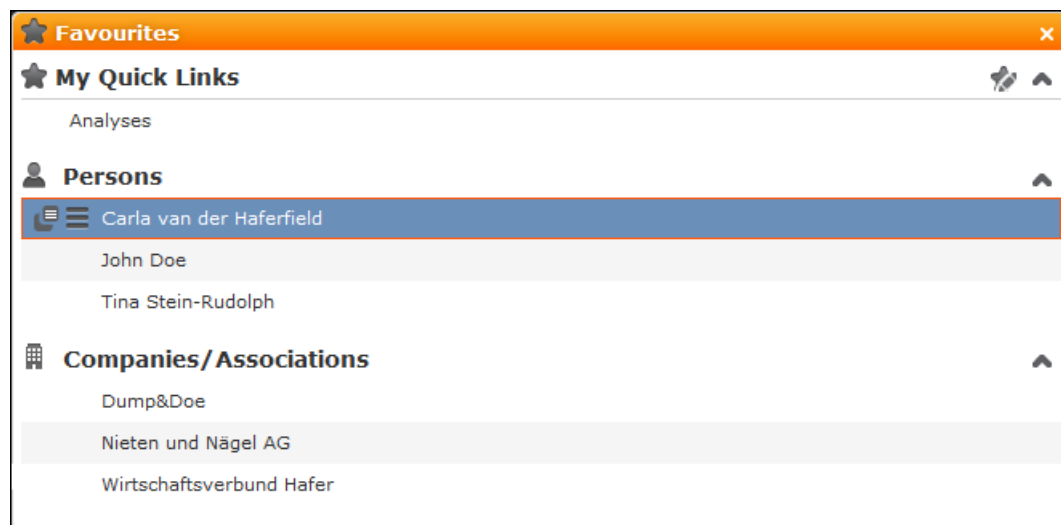
### Displaying your Favorites

To view your favorites list:

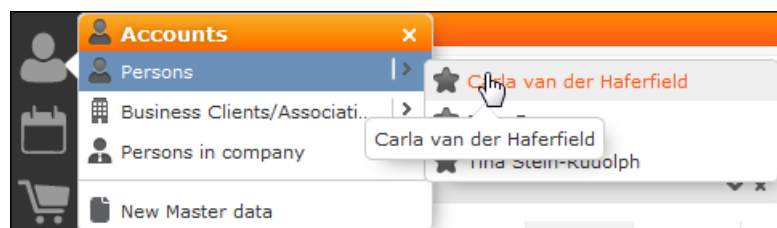
1. Click on  (**Favorites**).

Your favorites are displayed.

The top section displays your quick links. Your favorites are displayed below the quick links, grouped by info area.



2. Double-click on a record and edit it.
3. If you have added records to your list of favorites, you can also access these records from the corresponding menu entry (e.g. you can access your favorite companies from the **Companies** menu):



## Adding Records to your Favorites

To add a record to your favorites:

1. Switch to the desired record, >> [Searching](#) on page 60.
2. Select **Add to Favorites** from the record's context menu.

A message is displayed, confirming that the record has been added to your favorites.

## Removing Records from your Favorites

To remove a record from your favorites:

1. Either:
  - Open your favorites
  - Switch to the desired record
2. Select **Remove from Favorites** from the record's context menu.  
The selected record is removed from your favorites.



## Quick Links

You can add the areas you use regularly to your quick links.

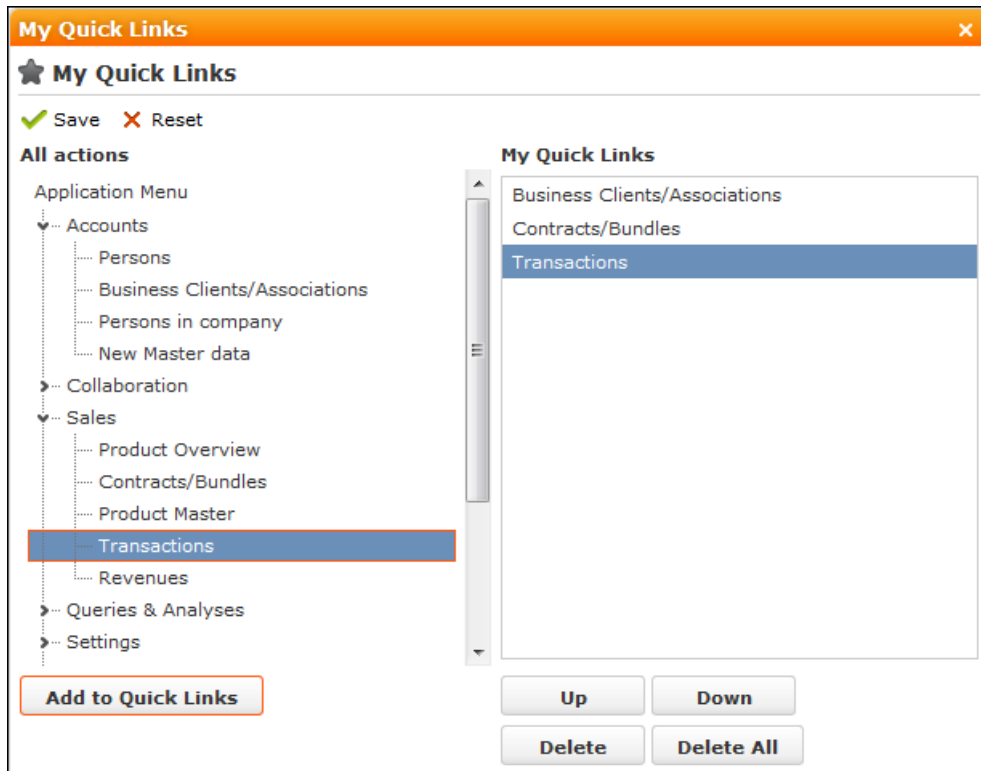
### Customizing Quick Links

If you have not yet defined any quick links, the **Quick Links** area is not displayed.

To add quick links:

1. Click on  (**Favorites**).
2. Click on **Click here to add your favorite pages** if you have not yet defined any quick links. Otherwise click on  (**Modify Quick Links**) in the header.

The **My Quick Links** dialog is displayed.



3. Click on the ▶ icon under **All actions** next to one of the sections.  
All available menu options are displayed.
4. Select an entry and click on **Add to Quick Links**.  
The entry is displayed under **My Quick Links**.
5. Use the **Up** and **Down** buttons to determine the desired position of the entry.
6. To delete an entry, select it and click on **Delete**. Use the **Delete All** button to delete all entries in the list.
7. Click on **Save** to accept your settings. Click on **Restore Defaults** to revert to the default settings.

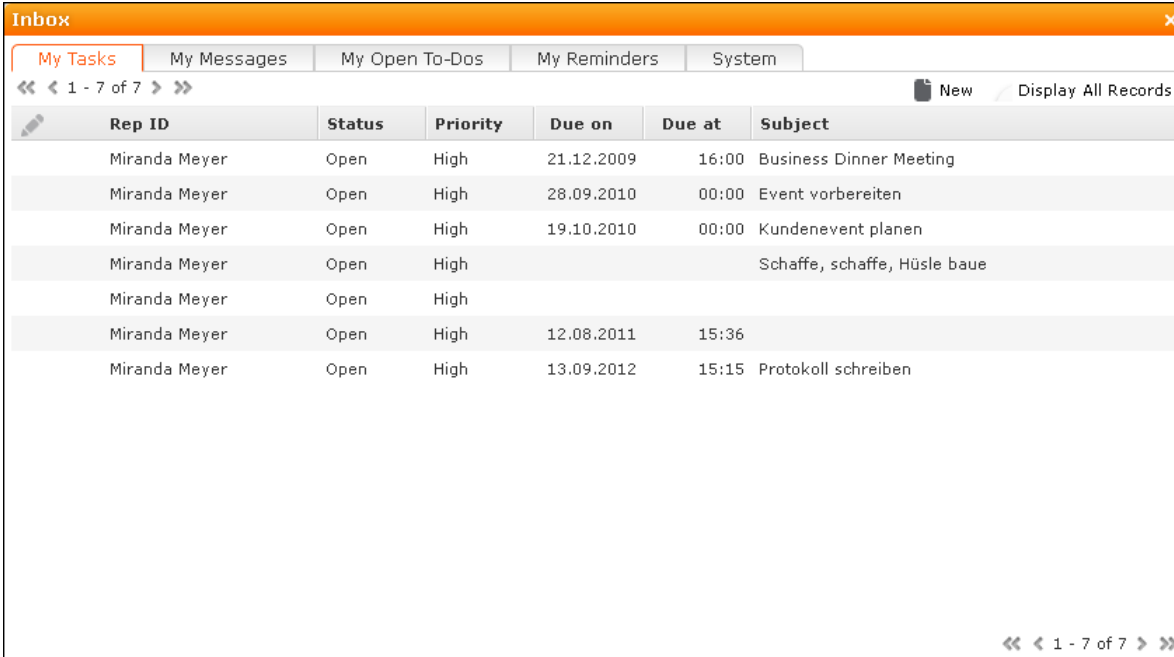
## Inbox

Your inbox contains various types of messages that inform you of specific events. Some messages are displayed for a defined period of time before being closed automatically.

To display your inbox:

1. Click on  (**Inbox**).

Your inbox is opened.



Rep ID	Status	Priority	Due on	Due at	Subject
Miranda Meyer	Open	High	21.12.2009	16:00	Business Dinner Meeting
Miranda Meyer	Open	High	28.09.2010	00:00	Event vorbereiten
Miranda Meyer	Open	High	19.10.2010	00:00	Kundenevent planen
Miranda Meyer	Open	High			Schaffe, schaffe, Hüsle baue
Miranda Meyer	Open	High			
Miranda Meyer	Open	High	12.08.2011	15:36	
Miranda Meyer	Open	High	13.09.2012	15:15	Protokoll schreiben

The following tabs are displayed:

- **My Tasks:** Tasks that have been assigned to you are listed here. You can also add new tasks.
- **My Messages:** Messages you have received are listed here.


You will receive messages to inform you that a background query has been completed or that mass updates have been performed on the server, for example.

- **My Open To-Dos:** Your open To-Dos are listed here.



To-Dos can be displayed for due activities, tasks, absences and marketing activities.

- **My Reminders:** Your reminders are displayed here.

Reminders can be defined for activities, tasks and absences and are displayed at the scheduled time in this tab.

- **System:** System messages, such as error messages, are listed here. If you have received a new system message, the inbox icon is displayed with an exclamation mark ()

2. Switch to the desired tab.

3. If not all tabs are displayed, click on  (**Scroll tabs right**). Alternatively, click on  and select the desired entry from the list.

## Working Area

The working area's contents depend on the current function and the data you are working with. For example, it may display a calendar, a search mask with the list of results or a mask allowing you to edit records.

You can display data in the working area in a number of ways, for example:

- Using the search, where you can use search criteria to define which records are displayed.
- Using your favorites, >> [Favorites](#) on page 22.
- From a query's results list, >> [Queries](#) on page 98.
- From your history of recently accessed records or search results, >> [History](#) on page 21.

## Buttons

Buttons are available in Aurea CRM web:

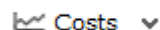
- Buttons are displayed in the working area between the header and the record:



- Some buttons, e.g. **Save** and **Cancel**, are only displayed following certain actions:



- Your administrator can group buttons together, for example:



Click on **▼** (**Further Options**) to select from the available options.

The last option selected is displayed to the left of the arrow button.

Your administrator can define that instead of the last used option, the first entry in the group is displayed.

- Your administrator can define triggers and assign them to buttons. Click on the button to execute the trigger.

Depending on your configuration, buttons and icons can be displayed with or without accompanying text.

## Navigation Bar

The following navigation bars are available:

- For records:

To switch between records:

- Click on (**Next**) to switch to the next record.
- Click on (**Previous**) to switch to the previous record.
- Click on (**Show/Hide**) to display the records in a drop-down list. Select the desired record from the drop-down list.

This navigation bar is only available when opening a record from a results list (not when opening the record in a new tab).

- In result lists:
  - Click on (**Previous**) to switch to the previous page of results.
  - Click on (**Next**) to switch to the next page of results.
  - Click on (**First**) to switch to the first page of results.
  - Click on (**Last**) to switch to the last page of the loaded results.

The number of records displayed in the results list is determined by the following user settings (>> [Handling Tab](#) on page 55):

- **Records per page:** Determines the number of records displayed per page of search results.

Example: <<< < 1 - 20 of 50+ > >>>

20 records are displayed per page.

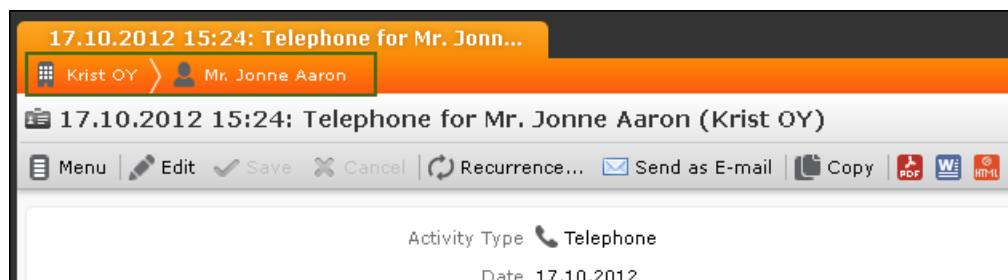
- **Records per query step:** Determines the number of records initially loaded from the server. If the list contains more records, additional records are loaded incrementally as you navigate in the list. Each batch of records transferred from the server corresponds to a query step.

Example: <<< < 1 - 20 of 50+ > >>> 50 records are returned by the server in each query step. The + icon indicates that additional results are available but have not been loaded yet.

Your administrator can override your settings for all or for individual lists.

## Breadcrumbs

The breadcrumb trail is located to the top of the screen, and provides you with an overview of your current position.



Click on a parent record in the breadcrumb trail to switch to that record.

## Search Area

The search area allows you to search for records using search criteria, >> [Searching](#) on page 60.

## Ghost Text


For some fields, so-called ghost text has been defined to help you input data. This text is displayed in light gray in input fields and provides additional information on what you can enter in text fields.

Example:



---


## Find as You Type

If find as you type function is available for link fields (fields where you can select data from other info areas using  (**Select**)), all hits that contain the characters you have entered are immediately displayed in a drop-down list. The more characters you enter, the shorter the list becomes. Click on the desired entry to enter it in the field.

## Views

There are various views available in Aurea CRM web:

- Tab view displays the information stored in a record, >> [Tab View](#) on page 29. In addition, child records are displayed under **Related Data**, >> [Related Data](#) on page 35.
- The tree view is only available in certain areas, and provides a hierarchical overview of related data. The tree view can depict multi-tiered hierarchies and you can edit child records, >> [Tree View](#) on page 31.

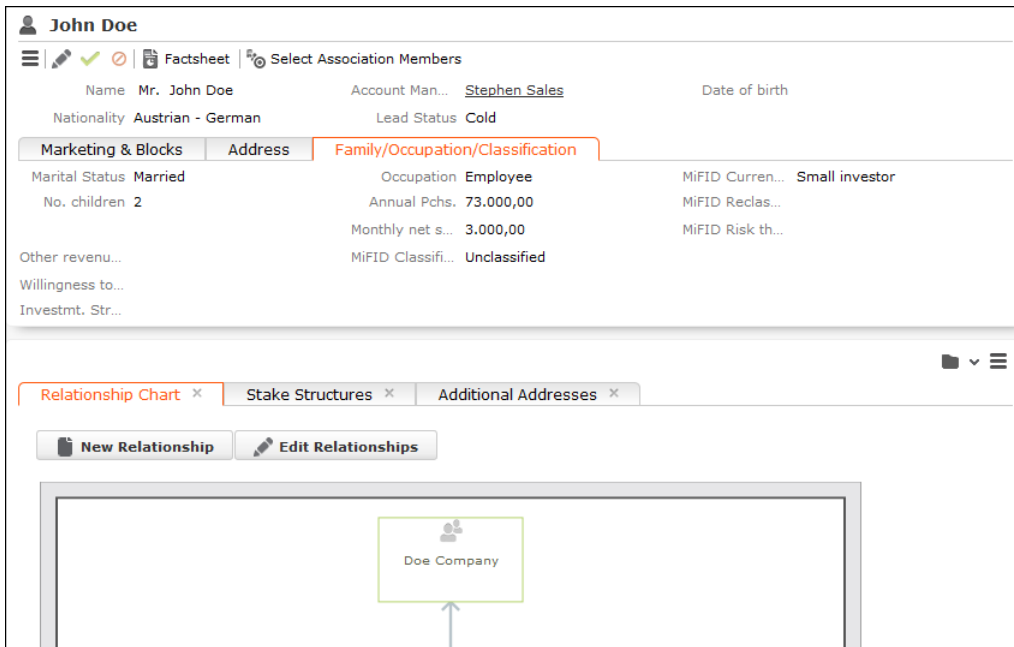
By default, data is displayed in view mode. To edit the data in a record, click on  (**Edit**) or double-click in the working area.

Depending on your configuration either the tab or the tree view is displayed after double-clicking on an item in a list.

### Tab View

Use the tab view to view all relevant information relating to a record at a glance. You can edit the data and access all related information quickly.

The following screenshot displays the tab view for an activity:



The record is displayed in the upper area. You can edit the data here.

The mask includes a "fixed" mask area containing the most important information, which is always visible. Below this area are several tabs or groups containing various fields.

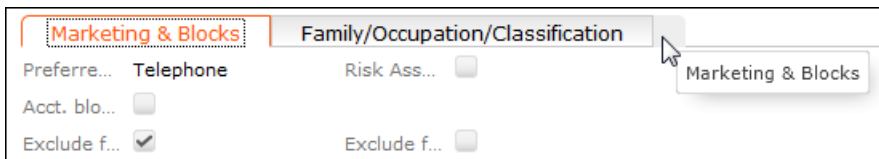
The lower portion of the mask shows tabs that contain related data, in the example above the **Relationship Chart**, **Stake Structures** and **Additional Addresses**.

### Changing the Order of Tabs

In tab view, the most important information is displayed in the upper area of the screen, additional information is displayed in the tabs below.

Example:

You can change each tab's position by dragging it to the desired position. The gray marking indicates where the tab will be placed when you release the mouse button:



You can also drag a tab to the upper area to display the contents of the tab there:

**Marketing & Blocks**

Preferre... Telephone Risk Ass...

Acct. blo...

Exclude f...  Exclude f...

**Address**

Salutator... Dear John, Address Operngasse 17-21  
1040 Wien Austria

Private T... +43(1) 555 555 Synonym E-mail john.doe@ymail.com

LinkedIn  
Xing  
Facebook

Family/Occupation/Classification

**Note:** You can also change the order of the tabs/groups that display related data in the same way.

### Restoring the Default Layout

Select **Reset Layout** from the context menu to restore the layout if you have changed it.

### Tree View


Use the tree view to display all relevant information concerning a record in a single view and to access related information.

The screenshot shows a CRM interface for a user named Chris Aki. On the left is a tree view with categories like Activities, Interests, Documents, Tasks, Incidents, Product Overview, Contracts/Bundles, Loan, Service, Product Roles, and Transactions/Revenues. The 'Loan' item is selected. The main area displays details for a 'Contract Loan' with fields for Product Master, Contract type, Product Group, Origin of data, Annual Net Pre..., Contract ends on, Payment Method, Currency, and Consultant. Below the details are tabs for 'Links', 'Details', and 'Bank Account'. At the bottom, there are tabs for 'Roles to Contract/Bundle', '...is linked to Products', and 'Documents', with a 'New Role' button and a message: 'The query returned no results.'

The tree contains child info areas and the working area displays data concerning the record selected in the tree. You can edit the record here, >> [Editing Records in Tab View](#) on page 81.

Drag the separator between the tree view and details view to change the width of the tree view.


### Quick View

The  (**Quick View**) button is available in most areas. Click on this button to display an overview of the record's key data without closing the current record.

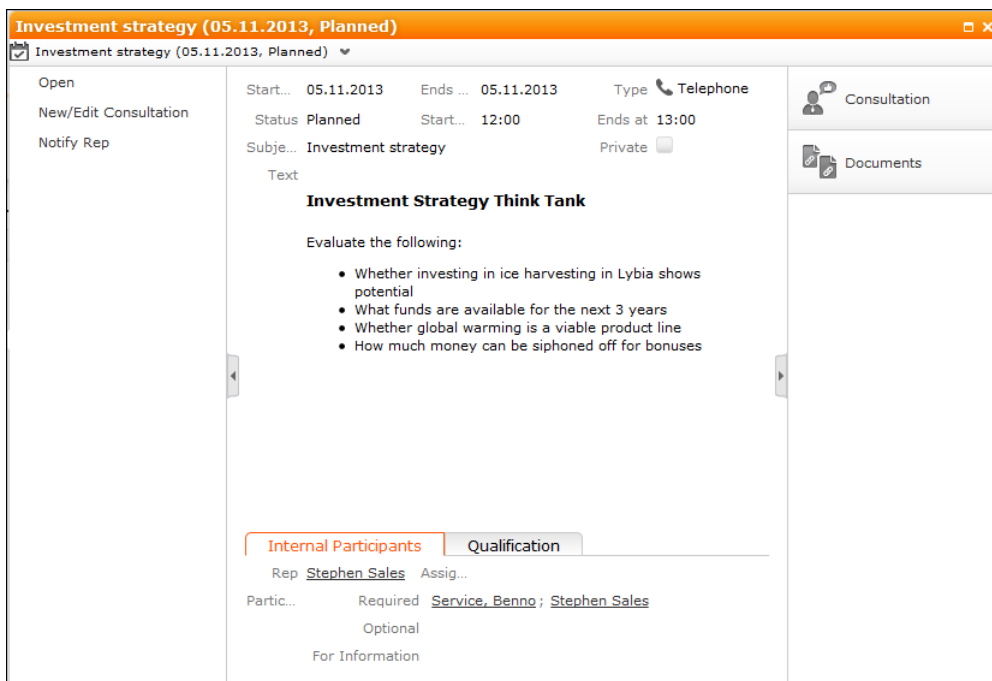
You can open multiple quick views one after another by clicking on additional links in the quick view in the same manner.

To display the quick view:

1. Either:

- Click on  (**Quick View**), e.g. in a list.
- Click on a link in a record or list, and keep the mouse button pressed.

The quick view is displayed:



The record's details are displayed in the center (and cannot be edited)

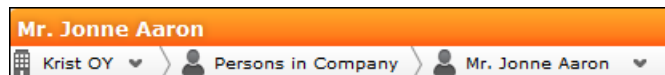
2. If you want to edit the record, select an appropriate option from the record's context menu. For example, you can open the record's tab or tree view or add a new child record.



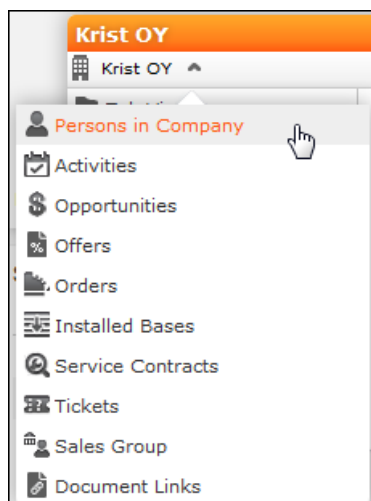
3. Click on  or  to hide/show the left and right areas.

## Breadcrumb Trail in the Quick View

The breadcrumb trail is also available in the quick view:



- Click on ▼ in the breadcrumb trail to and select an info area to display all records added for the current record in that info area.



The child records are displayed




Persons in Company								
Krist OY ▼ > Persons in Company								
Display All Records								
	Last Name	First N...	Function	Departm...	Area Code	Te	Com...	E-mail
	Aaron	Jonne	CEO	Management		1...	Krist...	ionne.aaro
	Krist	Leena					Krist...	leena.krist...

- Click on a record in the breadcrumb trail to display that record's details in the quick view.

## Lists

You can edit records directly in the results list, export the data, or display a record's important details in the MiniDetails.

The following functions are available in lists; move the mouse cursor over the record to display the icons:

-  (**Quick View**): Displays the quick view, >> [Quick View](#) on page 32.
-  (**Show Menu**): Displays the record's context menu, >> [Context Menu](#) on page 40.
-  (**Display Details**): Displays the record's details, >> [Displaying Details](#) on page 34.

## Result Lists

The following screenshot shows the results of a search:

Type	Starts on	Starts at	End...	Status	Subject
Telephone	16.10.2014	13:06		Planned	Feedback
Telephone	16.09.2014	13:06		Planned	Feedback
Telephone	20.03.2014	12:49		Planned	Customer satisfaction review

Your administrator can determine that the results list should fit to the size of your browser window if possible. If the list contains a large number of columns, the text in the column headers and cells may be shortened with "... " displayed at the end of the text. Move the mouse cursor over the cell to display a tooltip containing the contents of the cell.

Your administrator can determine that the first row in a list is automatically selected.

You can edit records in the results list as well as in sub-lists, >> [Editing Records in List View](#) on page 82.

Switch between pages of results using the arrows above and below the results list ( << < 16 - 30 of 45+ > >> ).

Use the Tab key to switch between fields in the list, >> [Editing Records in List View](#) on page 82.

In some info areas, related data can be displayed in sub-lists beneath the results list (e.g. all revenue related to a transaction). Sub-lists are only available when there is a relationship between info areas.

Double-click on a row to carry out the default action defined by your administrator; in most cases the record will be displayed in tab view.

Your administrator can determine that numeric values (e.g. order values) are totaled if all search results fit on the first page.

## Displaying Details

You can display an overview of the most important details stored in a record displayed in a list:

- Click on ▾ (**Show Details**) to the left of the desired record to display the details.

Synonym	Country Finland	Postal Code 00120
City Helsinki	Co. Type	Sector Holzverarbeitung
E-mail 1	Telephone <a href="tel:00389123456">00389123456</a>	Fax
Website	Rep 1 Miranda Meyer	Rep 2 Miranda Meyer

- Click on ▲ (**Hide Details**) next to the desired record to hide the details of that record.

## Color Codes and Icons in Lists

Your administrator can determine that entries in the list are displayed in different colors or with specific icons to indicate the status of records. Icons can be included in fields alongside text, or text entries can be replaced by corresponding icons.

## Total Lines

In some areas, such as analyses, sum totals can be calculated and displayed.

Results of the type "Sum" and "Count" can be totaled. Totals are not available for the types "Avg", "Min" and "Max" in drill-through analyses.

Your administrator is responsible for defining whether the total line is displayed.

## Related Data

Related data is displayed in the list, tab and tree views. Child data can be displayed in the **Related Data** area using a variety of views:

- Lists display related records, e.g. a person's activities
- Maps display data such as the address of a company or property
- Graphical views are used to display information on campaigns or relationships, for example.

You can customize the view of related data, >> [Changing the Order of Elements on the Start Pages and in Related Data](#) on page 38.

You can edit related data by opening the record in tab view or directly in a list, >> [Editing Records in List View](#) on page 82.

To display related data, e.g. for search results:

1. Select the record you want to view additional information on from the results list or open the desired record in tab view.
2. Click on the corresponding tab.

A list of all child records is displayed (e.g. all persons in a company).

The screenshot shows a CRM search interface. At the top, there is a search bar with fields for 'Company' (containing 'Krist\*'), 'Country', 'From ZIP', and 'To ZIP'. There are 'Clear Search' and 'Start Search' buttons. Below the search bar, it says 'Max. 15 Records / Page'. The search results are displayed in a table with columns: Company, Lead..., Country, P..., City, and Street. The results include Krist Aut. AG, Krist Intl. OY (highlighted), Krist ÖsterreichHolzimportGes.m.b.H. & ..., and Krist OY. Below the search results, there is a tabbed interface with tabs for 'Persons', 'Activities', 'Opportunities', 'Offers', 'Orders', 'Installed Bases', 'Service Contracts', 'Tickets', and 'Sales'. The 'Persons' tab is active, showing a list of persons with columns: Last Name, Fi..., F..., Depa..., A..., Company, E-m..., Tel 2, Private..., and Mobile T... The persons listed are Saarinen Aino, Aaron Jonne, Omena Jorma, Lehtolainen Leena, and Riistiholinen Leena.

To switch between tabs:

- Using the mouse: Click on the desired tab.
- Using the keyboard: Press Alt+0 to activate the **Related Data** area. Then press Alt+Number to switch to the desired tab. **Example:** In the screenshot above, the **Activities** tab is the second tab. Press Alt+2 to switch to this tab.

---

**Note:** Your administrator can define alternative keyboard shortcuts.

---

## Filter Masks

Filter masks are dynamic masks, that can differ depending on the data in a record.

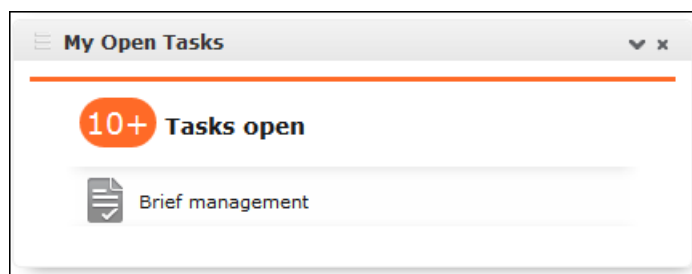
Filter masks can be used to differentiate between different types of records (e.g. the differences between contracts and bundles), or display different content (e.g. different fields for companies and associations).

Your administrator is responsible for defining filter masks.



## Live Tiles

Your administrator can define that the results of queries can be displayed in a live tile, e.g. on your start page. By default, the start page includes a query applied to open tasks:





The live tile consists of two elements:

- The header displays the number of records (e.g. the opportunities in the current quarter). Click on the number of hits (10) or  to open the query's search results. This button is only displayed when your mouse cursor is placed over the header.
- The records returned by the query are listed on after another in the area below the header. By default, each record is displayed for a few seconds.
  - Move your mouse over the record to stop the display from switching between records. Navigation buttons (◀ and ▶) are displayed to the left and right of the record. Click on these buttons to switch between records.
  - Click in  (**Show Menu**) to open the record's context menu.
  - Double-click on the record to open it in tab view.

Your administrator can determine that the lower section is not displayed.

If no hits are returned by the query, the live tile is not displayed.

## Displaying Records in Multiple Tabs




Data in Aurea CRM web is displayed in tabs. Depending on the info area and action you perform, new data is either opened in a new tab or in the current tab.

To open data in a new tab, hold down Ctrl and click on a menu option in the navigation bar or the context menu.

**Exception:** If the calendar is opened in a new tab by default; opening the calendar while pressing Ctrl does not open a new tab, but instead displays the existing tab.

Click on an open tab to switch to that tab.

If you open more tabs than can be displayed on the screen at once (the number is dependent on your screen resolution), you can navigate between tabs as follows:

- Click on  (**Previous**) and  (**Next**) buttons to switch between neighboring tabs.
- Click on  (**Show all tabs**) to display a list of all open tabs.

Select an entry from the list to switch to that tab.

Click on  (**Close**) to close a tab.

## Refreshing the Work Area

The working area is not always refreshed automatically after applying certain changes, e.g. in the list view, tree view or maps. The process arrows in certain guided processes are also not always automatically refreshed.



Select  > **Refresh Working Area** to refresh current view.

## Changing the Order of Elements on the Start Pages and in Related Data

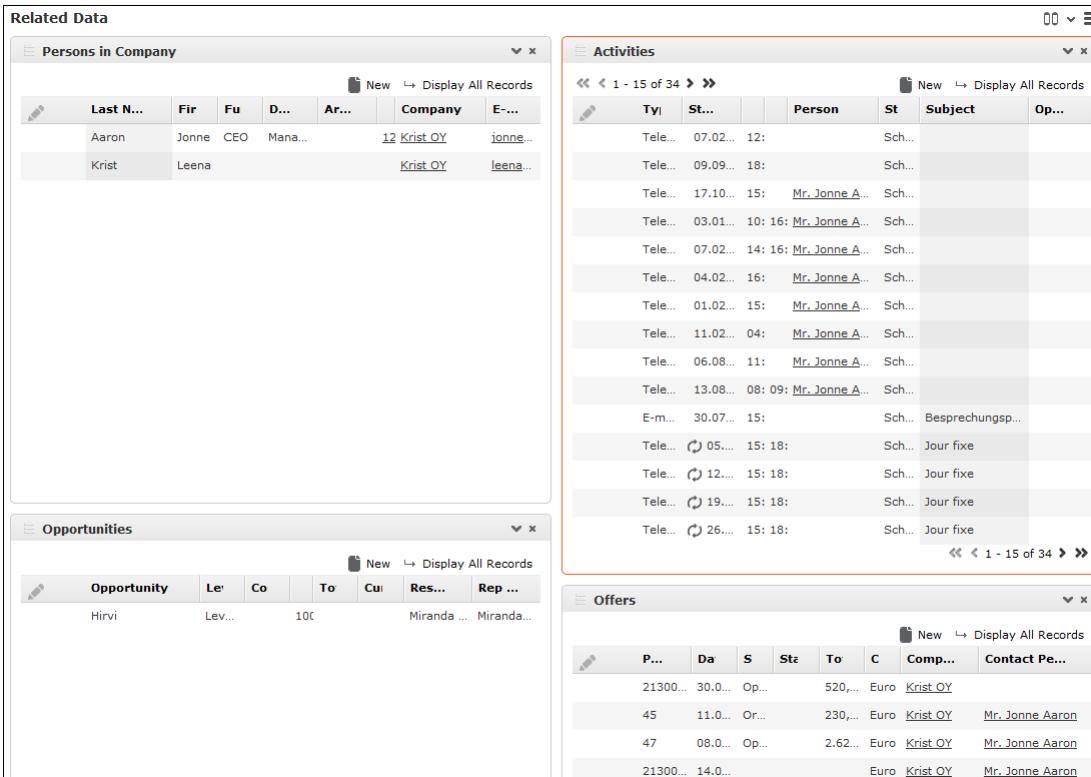
You can configure the layout of areas on the screen.

To change the layout:

1. Click on  and choose an option:



-  (**one column**): Areas are displayed beneath one another spanning the entire width.
-  (**two columns**): Areas are split over two columns.

Example:



The screenshot displays the 'Related Data' section of the Aurea CRM interface, which is organized into four panels:

- Persons in Company:** A table with columns: Last N..., Fir, Fu, D..., Ar..., Company, E-... It contains two rows of data.
- Opportunities:** A table with columns: Opportunity, Le..., Co, To, Cui, Res..., Rep... It contains one row of data.
- Activities:** A table with columns: Ty..., St..., Person, St, Subject, Op... It contains multiple rows of activity data, including telephone calls and emails.
- Offers:** A table with columns: P..., Da, S, St, To, C, Comp..., Contact Pe... It contains four rows of offer data.

-  (**tabbed**): Displays the areas in separate tabs.
-  (**Select Items**): Click on this icon to display a list of all available areas. Enable the check box next to the areas you wish to display. Click on **Reset** to revert to the default settings.

Your administrator can define that certain areas cannot be hidden or that certain areas are not active by default.

To change the order of areas:

1. Click on an area and drag it to the desired position while holding the mouse button.
2. Release the mouse button.

## Links

Various fields are displayed as links in Aurea CRM web. For example, links can be used to link to records in a parent or child records. E-mail addresses and URLs can be entered as links that are opened in the associated application.

By default, links are displayed underlined.

Rep [Adam Aussendienst](#)

Click on the link to carry out the action associated with the link type:

- If the link references another record, the record is opened in the default view.
- If the link is an e-mail address, your default mail client is opened. Depending on the settings configured by your administrator, you may need to add a new activity before you can write the e-mail.
- If the link is a URL, the web page is opened in a new browser window.
- If the link references a document, the document is opened in the associated application.
- Reps entered in rep fields are displayed in the quick view, where you can view information on the rep (e.g. e-mail address, telephone number).
- Telephone numbers are either opened in CRM.phone (if installed) or the application associated with the `tel:` protocol.

## Assigning Icons to Links

Your administrator can determine that an icon is displayed instead of specific URLs in view mode. Click on the icon to open the URL.

If you switch to edit mode, the contents of the field are displayed and can be edited.

The following social media icons are available by default:



These icons are only displayed if a link to a profile is entered in the link field.

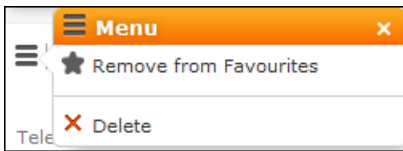
## Context Menu

The context menu is available in list view, tree view and tab view.

You can access the context menu in the following ways:

- Click on **☰ (Menu)**.
- Press **Ctrl+M** on your keyboard in the tab or tree view. You can also use the cursor keys to navigate within the menu.
- Hold down **Ctrl** and click on an entry in the context menu to open the corresponding view in a new tab within the current window, >> [Displaying Records in Multiple Tabs](#) on page 37.

The following screenshot shows the context menu for companies:



The contents of the context menu depends on the current info area.

## Date Picker

The date picker is available in the calendar views and in date fields to choose a date.



You can use the arrows on either side of the month and year in the calendar header to move back one month (left arrow) or forward one month (right arrow). Alternatively, click on the month or year in the header to select the month and the year from a drop-down list.

The calendar week is displayed in the **W** column. If you click on the week number in a calendar view, this week is displayed.

Click on a date to highlight it in the calendar and switch the daily or weekly display to this date or enter the date in a field. The current date is displayed in bold, and can be selected by clicking on **Today** directly below the calendar.

---

Sundays and holidays are color-coded according to the holidays defined in the calendar selected in the settings, >> [Date & Time Tab](#) on page 57.

## Field Types

The following chapters describe the field types that are used to enter data:

Your administrator can define the following for fields:

- Keyboard shortcuts used to navigate directly to a specific field.
- The field formatting, which can differ depending on the field's content, e.g. negative numbers can be displayed in red.
- Whether catalog and percentage fields are displayed graphically or numerically, >> [Displaying Percentage and Catalog Fields Graphically](#) on page 46.

## Text Fields

You can enter strings containing any characters in text fields.

Your administrator can define that text fields are displayed spanning multiple rows. If the text is longer than the space available to the field, a scroll bar is displayed. Your administrator can also determine that the ▼ button is displayed. Click on this button to increase the size of the text field to display the full contents.

## Numeric Fields

You can only enter digits (0-9), commas (,) and decimal points (.) in numeric fields.

## Catalog Fields (Drop-down Lists)

Catalogs are displayed as drop-down lists.

---

**Note:** Whether you can add new catalog values, depends on your access rights.

---

Your administrator can determine how catalogs are sorted:

- Alphabetically
- By catalog number
- Using a sort order defined by your administrator

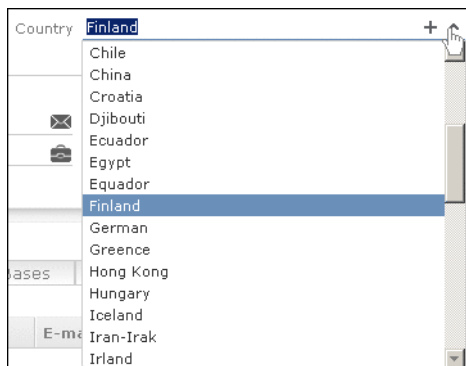
---

**Note:** Your administrator can determine that catalog values are sorted differently in different languages.

---

To select an option from a drop-down list:

1. Click on ▼ to open the drop-down list.



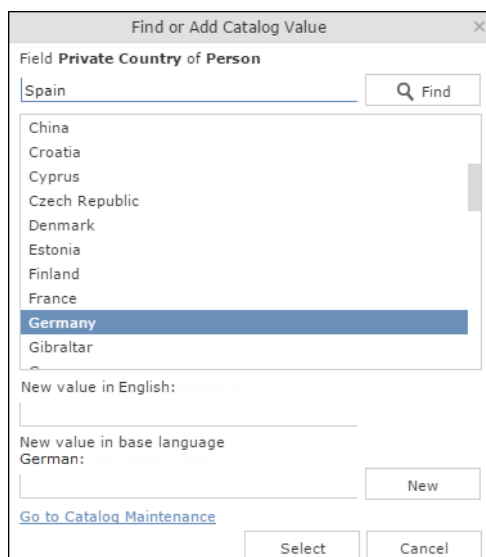
2. Select the option you want to enter in the field. Alternatively you can navigate in the drop-down list by typing the first character (e.g. typing 'F' will highlight the "Finland" entry). If you select a value, the drop-down list is closed.

## Adding Catalog Values

To add catalog values:

1. Click on the icon **+** (Add/Find Catalog Values) next to a catalog field.

The **Find or add catalog value** dialog box is displayed:



2. Enter the new catalog value in the text field.
3. Click on **New** to add the entry to the catalog.

The new entry is displayed at the end of the list. The catalog is only sorted alphabetically the next time you log on to Aurea CRM web.

---

**Note:** Tenant numbers are displayed in parentheses alongside catalog values if tenants have been configured for your system.

---

You can also use the dialog box to search for specific entries in long catalogs.

**Note:** When adding new catalog values in your language, you also need to enter the value in the catalog base language if you are logged on to the system using another language than the catalog base language. If you have the necessary access rights, **Go to Catalog Maintenance** is displayed as a link below the list of catalog values. Click on this link to switch to the **Catalog Maintenance** area where you can manage all catalog values.

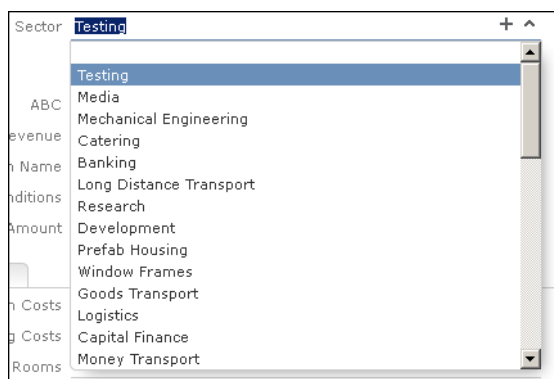
## Multiple Catalog Values in a Field

Some catalog fields in the database are defined as so-called array fields. You can enter multiple values in these fields. Array fields contain the ghost text "Add X more", indicating the number of catalog values that can still be entered in the field.

**Note:** CRM administrator can restrict the number of catalog items that can be added to the array field. Contact your system administrator if you are unable to add more catalog items to the array field.

To enter multiple catalog values:

1. Click on the catalog field or the downwards arrow next to the field.
2. The drop-down list is displayed.



3. Select the desired entry.

Depending on your access rights, you may also be able to add new catalog values when needed. To do so, click on **+ (Add/Find Catalog Values)**.

4. Repeat the process if you want to add additional entries. The number of entries you can still add is displayed in light gray.

## Date Fields

You can enter the date in date fields directly or use the pop-up calendar, >> [Date Picker](#) on page 40.

If you enter the date directly, you can only enter the following characters:

- Digits
- The date separator defined in your user configuration, >> [Date & Time Tab](#) on page 57.

If your date format uses four digits for the year, the current year is entered automatically.

Use the Date Picker to select the desired date, >> [Date Picker](#) on page 40.

The pop-up calendar is closed once a date is selected.

---

**Note:** Use the pop-up calendar to ensure that dates are always entered in the correct format (e.g. day/month/year). If you enter dates manually, ensure you enter the date in the correct format.

To disable auto-completion of the year field, contact your Aurea CRM administrator.

---

## Time Fields

You can enter times directly in time fields. The following characters are permitted:

- Digits
  - The time separator defined in your user configuration, >> [Date & Time Tab](#) on page 57.
  - "am" and "pm" if you are using the 12 hour format.
  - Spaces
- 

**Note:** Your administrator can determine that the current time is automatically entered in time fields, e.g. as the start time of an activity.

---

## Rep Fields

Reps are selected using rep fields. You can either select a rep from a dialog box listing all reps, or enter a portion of the rep's name in the field, >> [Selecting Reps](#) on page 89.

## Mandatory Fields

Mandatory fields must be filled in before you can save the record. Your administrator can determine that mandatory fields are highlighted. In the default configuration, mandatory fields are displayed in orange and indicated with an asterisk or exclamation mark.



If data has not been entered in all mandatory fields when saving a record, the cursor is moved to the first mandatory field that is missing data.

In the example below, a currency must be entered in the **Currency** field before the record can be saved.

!Type	Visit	▼
!Subject		
!Starts on	10.10.2013	▼


**Note:** If you are working in tab view, tabs containing mandatory fields that have not yet been filled in are formatted differently. Your administrator defines the appearance of these fields.


## Boolean Fields


Boolean fields can only store Boolean values (i.e. false/true or 0/1 or check mark/no check mark).

## Link Fields

Link fields are fields linked to records in other info areas.

Link fields are displayed as links in view mode. In edit mode, the  (**Select**) icon is displayed to the right of the field:

End Customer Company	Krist Intl. OY	 
End Customer Person	Mr. Jonne Aaron	 

Click on  to access the search mask for the linked info area and search for and select the desired record.

Your administrator can determine that

- selecting a child record (such as a person) causes any related parent data (such as the person's company) to be entered.

Example: If a person is entered in the **End Customer Person** in the **Ticket** info area, the **End Customer Company** can be entered automatically.

- a link can be removed by clicking on  (**Remove Link**).

**Note:** If you delete a link to a parent record, links to related child records are also deleted.

## Displaying Percentage and Catalog Fields Graphically

You can display the contents of percentage and catalog fields (e.g. "High", "Medium" and "Low" priority) graphically, as well as enter values using the graphical display.

### Catalog Field Examples:

Your administrator can also determine which colors or icons are used for which values and whether only the icon, the value, or both are displayed.



or



or



- Click on the desired icon to enter a new value.
- Move the mouse cursor over the icon to display the value.

### Percentage Field Examples:

By default, a slider is used to enter percentage values, however your administrator can deactivate the slider. Your administrator can also determine whether you can enter negative values using the slider. Positive and negative values are differentiated by color.

Default slider:



Slider for positive and negative values:



To enter a percentage value:

- Enter a value in the numeric field.
- Use the mouse to drag the colored bar to the desired position.

## HTML Fields

HTML fields allow you to enter and format content using an HTML editor. Your administrator can add HTML fields to info areas.

The most common formatting options, e.g. bold, italics, numbered lists etc. are available.

---

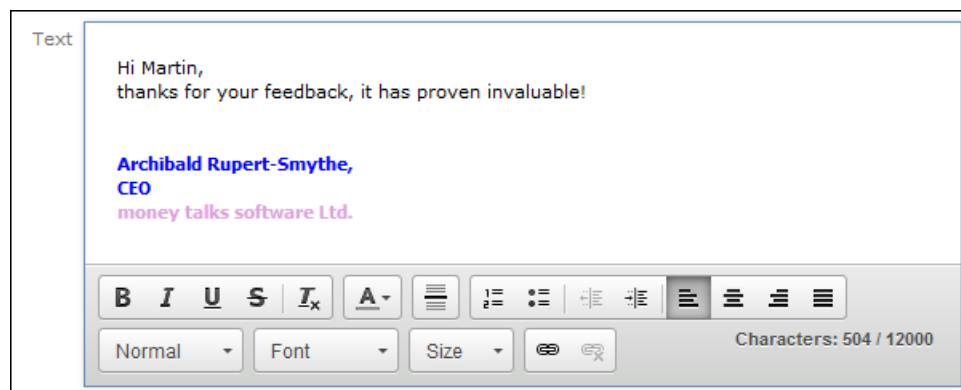
When sending e-mails the text is sent as HTML.

---

**Note:** This option is only available if e-mails are sent by the server.

---

Example:



## Field Data Types

In some dialog boxes, the field type is also displayed along with the field name and number.

The following data types are available:





- B = Boolean
- C = Character string
- D = Date
- F = Floating point number
- K = Variable catalog
- L = Long integer
- S = Short integer
- T = Time
- X = Fixed catalog
- Z = Write-protected/decoded fields whose values are entered automatically by the business logic, e.g. system and link fields.

## Displaying Content from Multiple Fields in a Single Field

In some views, such as the tab view or the mini details view, your administrator can combine multiple fields' contents in a single field. For example, an address field can be defined that contains the contents of the **Street**, **Postal Code**, **City** and **Country** fields:

Address Vorgartenstraße 40  
1020 Wien, Austria

The fields are displayed separately in edit mode:


Street	Vorgartenstraße 40
Postal Code	1020  
City	Wien
Country	Austria  

## Field Help

Aurea software AG provides an Excel file that contains descriptions of the fields in the default version of the software. This Excel file can be customized by your administrator to reflect your system's configuration and can be imported into the Aurea CRM database. In this case, you can access the online field help.

If you move your mouse cursor over a field name, a tooltip is displayed containing information on the data stored in the field.

Example:

	Company Megabucks FC
Name of the company	
In this field you should enter the legally correct name of the company. This includes entering the company name as well as the legal form of the company (e.g. update Software AG).	

## Write-protected Records and Field Access

Your user rights determine which data you can access. If e. g. you have only been granted read access to certain fields or info areas, you can access and display the data stored there, but cannot edit the data.

Access to data is indicated as follows:

- **Access denied** is displayed in fields to which access is denied in list view.
- If access is denied to the entire record, an icon is displayed on the left border whose tooltip is "[info area name] cannot be edited."

You can only move the cursor to those fields that you are allowed to ed-

Company

Street

Postal Code

City

Country

**Address** | Type | Classification | Event

Country Code

Telephone

E-mail 1

Rep 1 ID

Website

it.

## Displaying All Fields

The default user interface used by various info areas do not display all fields in records. If you have been assigned administrator rights, you can access all fields in the database. Additional information can also be displayed concerning the fields.

To display all fields:

1. Switch to the desired record.
2. Click on **All Fields** from the context menu.

The following dialog is displayed (in this case for a company record):

All Fields of Delivery Address (ZA#x0000271100000077)

✓  Reset  Sort by index  Only Fields with Values  Show field information

(Created on)internal code 67108864

(Updated on)internal code

Added on StNo. 10001

!Address Type Delivery Address

Alternative Name

Area Code

Borough

City Rowlingsham

CmCd.

Com Date

Com Station

Com Time

Company Cranes inc.

Country Great Britain

Country Code +44

Created at 16:40:31.071

Created by SU0001

Created by ID SU0001

Created in Module web




Created on 23.09.2013

DelCd.

Division

E-mail delivery@customer-name.co.uk

3. The following buttons are available in this view:

- : Sorts the fields by index or field name.
- : Switches between displaying all fields, only those fields containing data and only those fields that have been edited.
- : Displays additional information about the fields such as the field number in the vertical, the core field number etc.

4. You can edit and save records in this view.

## Messages when Executing Triggers

Your administrator can define triggers that are executed automatically when specific actions are carried out (e.g. adding or deleting a record). Depending on how your administrator has configured your system, you can also execute triggers using buttons or entries in the context menu.

When an action is executed, status messages (such as error messages) are sent to your inbox, >> [Inbox](#) on page 25.

However, if a trigger initiates a second trigger, and an error occurs while executing the second trigger, no error message may be displayed for technical reasons. No messages are displayed in the message area whenever follow-up triggers edit, add or delete records. Changes (e.g. to field contents) are only displayed once the view has been refreshed.

## System Lock Messages


Your administrator can define system locks. If a system lock has been defined, you will receive a message informing you of the system lock, and are automatically logged off. You cannot log in again for the entire duration of the system lock.

This type of message is valid for the duration defined by your administrator. Your client needs to poll the server for messages. The interval with which Aurea CRM web polls for messages is defined by your administrator.

If your administrator defines an immediate system lock, i.e. you are immediately unable to access the system, the message is only displayed if the system polls for a message while the system lock is in effect (which may not happen if the system is locked for less than the polling interval).

## Sending E-mail

You can send e-mails directly from within Aurea CRM web:

- Click on an e-mail address in a customer record to send an e-mail to that address.
- Click on  (**Send as E-mail**) in a record.

If you send a record using this option, certain data is automatically transferred from the source record to the e-mail. For example, the following are transferred when sending an activity:

- To: The name of the contact person and the name of additional participants (e.g. in an appointment) and the responsible rep.
- Cc: The current rep (the one sending the e-mail)
- Subject: The activity's subject
- Text: The contents of the **Text** field in the activity record.

When sending e-mails via the server:

- All linked documents are included as attachments
- The e-mail is sent automatically; you cannot edit it
- Unicode characters are supported

When sending e-mails from your client:

- No attachments can be sent
- HTML mails are not supported

## Notifying Reps

You can send a link to a specific record to internal reps and external participants by e-mail, e.g. a link to an activity.

To notify reps:


1. Switch to the desired record, e.g. an activity.
2. Select **Notify Rep** from the context menu. The following dialog box is displayed:

3. The following recipients are suggested by the system:
  - Recipients: The rep entered in the record and the contact person or company's e-mail address
  - Cc: All required participants
  - Bcc: All additional participants (optional and for information)
4. You can enter **Additional internal recipients**, >> [Selecting Reps](#) on page 89.
5. You can enter **Additional external recipients** by entering their e-mail addresses.
6. The **Subject** and **Body** are transferred from the record. You can edit these fields.
7. Determine whether to insert a link to a record or request a receipt using the **Insert Aurea CRM web link**, **Insert Aurea CRM win link**, **Request a delivery Receipt** and **Request a read** receipt check boxes.

---


**Note:** The “Insert Aurea CRM web link” check box can be checked by default, if your administrator has set it that way. You can uncheck it, and in subsequent notifications to this recipient it will remain unchecked.


---

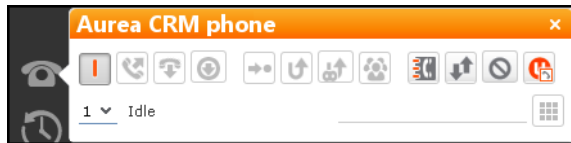
8. Click on  (**Insert Signature**) to include your signature in the e-mail (provided a signature has been defined in your rep record).
9. Click on **Send** to send the e-mail.



## Hiding/Showing the CRM.phone toolbar

If you are using Aurea CRM web with CRM.phone, a telephone icon () is displayed in the sidebar:

1. Click on  to display the CRM.phone toolbar.



2. Click on  (**Close**) to hide the toolbar.

Your administrator can determine whether the CRM.phone toolbar is displayed automatically when an incoming call is received. The toolbar is not automatically hidden when the phone call is completed.

For more information on CRM.phone, >> CRM.phone User Manual.



## Touch Devices

You can use Aurea CRM web on touch devices. Aurea CRM web is capable of detecting whether you are using a touch device.

If you are using a touch device that also supports a mouse, you can choose whether to use the mouse, your fingers, or both. Your choice is stored in your browser cache and is reused the next time you log on. You can however switch to a different mode at any time.

For information on which browsers are recommended for which operating system, refer to the system requirements available from the Aurea's support site at <http://support.aurea.com>.

Common touch gestures are supported, such as:

- Navigating in lists: Swipe in the desired direction. The  and  icons indicate the direction in which you are navigating.
- Sorting data in lists: Tap on a column header to sort entries by the value in that column in ascending order. Tap again to sort the data in descending order.
- Drag&drop: You can use drag&drop, for example in the calendar to reschedule appointments.
- Virtual keyboard: The available keys depend on the type of field. A numeric keypad is displayed for numeric fields, whereas the @ character is available when entering e-mail addresses.

## Settings

Use the **Settings** menu to determine your configuration, change your password and display system information.

---

**Note:** Which options are available to you depend on your access rights.

---

## User Configuration

Select **User Configuration** from the **Settings** menu to change your user settings, such as the number of records displayed per page in lists.

To change your user configuration:

1. Select **Settings > User Configuration** from the menu.
2. Switch to the corresponding tab. The following tabs are displayed:
  - Layout, >> [Layout Tab](#) on page 54.
  - Handling, >> [Handling Tab](#) on page 55.
  - Activities, >> [Activities Tab](#) on page 56.
  - Date & Time, >> [Date & Time Tab](#) on page 57.
3. Configure your settings.
4. Save your settings

---

**Note:** Not all of the changes are applied immediately after saving. Instead they are applied the next time you log on to Aurea CRM web.

---

## Layout Tab

Use the **Layout** tab to configure the following:

Layout	Handling	Activites	Date & Time
Start page <u>Sales Dashboard</u> ▼			

- **Start page:** Select the start page here; i.e. the page that should be displayed after you have logged on to Aurea CRM web.

## Handling Tab

Layout	Handling	Activities	Date & Time
Base Currency <u>no value</u> ▼			
Records per page <u>15</u> ▼			
Records per query step <u>50</u> ▼			
Check for new records every min. <u>30</u>			
Sort order of fields in query and filter designer <u>Alphanumeric</u> ▼			
Default view for rep selection <u>List View</u> ▼			
Search: Go to details view when search result is one rec... <input type="checkbox"/>			
New records: Use field values from last data entry <u>Default (do not transfer the last input)</u> ▼			
Save history <input type="checkbox"/>			
Remember last search criterion for queries and analyses <input checked="" type="checkbox"/>			
Activate browser on incoming call <input checked="" type="checkbox"/>			
Display the administrator information in the field help <input type="checkbox"/>			
Remember search and filter criteria based on last user in... <input checked="" type="checkbox"/>			

Use the **Handling** tab to configure the following:

- **Base Currency:** You can choose a base currency to be used in Aurea CRM web. Currency values can be converted to the base currency using the exchange rate table and displayed where appropriate (for example the value of orders in the local currency). In order to display values in this currency, fields need to be added to the masks by your administrator.

The base currency is also used for calculating costs for marketing activities and campaigns.

- **Records per page:** The number of records that should be displayed per page in result lists. Up to 50 records can be displayed per page. If more results are returned, the navigation bar is displayed, >> [Navigation Bar](#) on page 27.
- **Records per query step:** The number of records returned by the server for each request.
- **Check for new records every min:** Enter the frequency with which Aurea CRM web checks for new records such as reminders or messages.
- **Sort order of fields in query and filter designer:** Use this option to determine the order that fields are listed in when creating filters or queries. The entries can be sorted alphabetically or using their index.
- **Default view for rep selection:** Determines the default view used to select reps. You can choose between list view or tree view.

- **Search: Go to details view when search result is one record:** Enable this check box to automatically switch to the detailed view if a search only returns one record.
- **New Records: Use field values from last data entry:** Determines whether the data entered in the last record added is automatically transferred to subsequent new records:
  - **Default (do not transfer the last input):** No data is entered in new records.
  - **Use all values from last data entry:** The data in the last record you have added is automatically entered.
  - **Use admin-defined values from last data entry:** Your administrator can define fields whose values are set to the value entered in the last new record.
- **Save history:** Determines whether the history is saved and available the next time Aurea CRM web is started, >> [History](#) on page 21.
- **Remember last search criterion for queries and analyses:** The last search criterion is displayed when you re-open the search mask.
- **Activate browser on incoming call:** If the browser is currently in the background (i.e. you are working in another application), the browser is sent to the foreground when receiving a call.
- **Display the administrator information in the field help:** If information for administrators is available, this information is displayed in the field help.
- **Remember search and filter criteria based on last user input:** The last search and filter criteria are stored and reloaded when the search is reopened.

## Activities Tab

Layout	Handling	Activites	Date & Time
Start of work day (hh:mm)		08:00	
End of work day (hh:mm)		18:00	
Collision check		<input checked="" type="checkbox"/>	
Min. length of displayed activities		5	
First year in date picker		1900	
Last year in date picker			
First week of the year must contain		4th January ▼	
Number of days selected when selecting a week		5	
Items displayed in the calendar sidebar		<input checked="" type="checkbox"/> My Next Activities <input type="checkbox"/> My To-Dos <input checked="" type="checkbox"/> My Next Tasks <input checked="" type="checkbox"/> My Absences	

Use the **Activities** tab to configure the following:

- **Start of work day (hh:mm):** Enter the time the working day starts. The time between the start of the day and the end of the day is highlighted in the calendar.
- **End of work day (hh:mm):** Enter the time the working day finishes.
- **Collision check:** Enable this check box if you want the system to check whether new activities clash with existing activities.

---

**Note:** If you add activities in the calendar, the collision check is not activated, as you can tell whether another appointment is scheduled at the time in the calendar itself.

---

- **First year in date picker:** Enter the earliest year that is available in the calendar.
- **Last year in date picker:** Enter the last year that is available in the calendar.
- **First week of the year must contain:** Enter the day of the month that the first calendar week must contain.
- **Number of days selected when selecting a week:** Enter the number of days to be displayed when displaying a week in the calendar.
- **Items displayed in the calendar sidebar:** Determines which records you can display in the calendar's sidebar.

## Date & Time Tab

Use the **Date & Time** tab to configure the following:


Layout	Handling	Activites	Date & Time
			Holiday calendar <b>no value</b> ▼
			Date format <b>Server</b> ▼
			Date separator <b>Server</b> ▼
			Year format <b>Server</b> ▼
			Time format <b>Server</b> ▼
			Time separator <b>Server</b> ▼
			Decimal separator <b>Server</b> ▼
			Digit grouping symbol <b>Server</b> ▼
			Time zone <b>Server</b> ▼

- **Holiday calendar:** Determines which days are displayed as holidays in the calendar.
- **Date format:** Determines how dates are displayed.
- **Date separator:** Determines the character used to separate days, months and years in dates. You can choose between "/", "-", ".", or **Server**.

- **Year format:** Determines how years are displayed (2 digits, 4 digits or determined by the server).
- **Time format:** Defines how the time is displayed (24-hour clock, 12-hour clock or determined by the server).
- **Time separator:** Defines the separator used between hours, minutes and seconds (:, . or **Server**).
- **Decimal separator:** Determines the character used as a decimal point. You can choose between ".", ",", and **Server**.
- **Digit grouping symbol:** Determines the character used to separate millions, thousands etc. You can choose between ",", ".", "", **Space** and **Server**.
- **Time zone:** Defines your time zone. This setting is used to convert times to your time zone. For example, if you set your time zone to San Francisco, 15:00 CET is displayed as 6:00 in the calendar. Select the **Client** option to display the calendar using the time zone configured in the system settings on your local computer. You need to close your browser and restart it before the **Client** setting is applied to the calendar.

## Info Area Rights

Your administrator can determine that you can display a table containing all the info areas in Aurea CRM web that you can access as well as your access rights for the info areas (read, edit, new, delete).

To display your info area rights, select  (**Settings**) > **Info Area Rights** from the menu.

Info Area Rights << 1 - 20 of 190 >>					
Info Are...	Info Area Name	Read	Edit	New	Delete
US	Login	Y	Y	Y	Y
ID	Rep	Y	Y	Y	Y
AS	Station	Y	Y	Y	Y
ES	Central Login Configuration	Y	Y	Y	Y
FI	Company	Y	Y	Y	Y
KP	Person in Company	Y	Y	Y	Y
KA	Catalog	Y	Y	Y	Y
LA	Country	Y	Y	Y	Y
OR	City	Y	Y	Y	Y
SL	Selection	Y	Y	Y	Y
AK	Marketing Activity	Y	Y	Y	Y
MA	Activity	Y	Y	Y	Y
NO	Note	Y	Y	Y	Y
BR	Mailing	Y	Y	Y	Y
BF	Demand	Y	Y	Y	Y
SB	Sales Group	Y	Y	Y	Y
FB	Company Hierarchy	Y	Y	Y	Y
ZA	Additional Address	Y	Y	Y	Y
PF	Portfolio	Y	Y	Y	Y
BZ	Allocation	Y	Y	Y	Y

<< 1 - 20 of 190 >>

A "Y" in the **Read**, **Edit**, **New** and **Delete** columns indicates that you can view, edit, add or delete records in that info area. An "N" indicates that you cannot view, edit, add or delete records in that info area.

---

**Note:** Contact your supervisor if you require changes to your access rights.

---

## Changing Passwords

To change your password directly from within Aurea CRM web:

1. Select  (**Settings**) > **Change Password** from the menu.



2. Enter your current password in the **Old Password** field and enter and confirm your new password in the fields below.
3. Click the **Change Password** button.

A message appears informing you that your password has been changed successfully.

## System Information

Use the system information to access information such as your user name, rep and database version. If you are experiencing problems with the system, you can mail this information directly to the e-mail address specified at the bottom. The text field allows you to describe the problem in greater detail.

To send the system info to the specified e-mail address:

1. Select  (**Settings**) > **System Information**.

The system information dialog box is displayed.

2. Describe your problem in the **Additional Description** field.

**System Information**

User: MARIA  
 Rep: Miranda Meyer  
 User Group: 10000007  
 Station number: 100  
 Rights: Historisierung IB  
 Roles: No roles assigned  
 Configuration: [User MARIA ChildOf UPDATE\_DEFAULT (#100024)] [UPDATE\_DEFAULT Offline (#6)] [UPDATE\_DEFAULT (#0)]  
 Phone Profile: Standard\_tel\_prof\_u8  
 Language: English (language eng , sub language 200)  
 Browser User Agent: Mozilla/5.0 (Windows NT 5.1; rv:16.0) Gecko/20100101 Firefox/16.0  
 Active Sessions: 634  
 Server Path: http://updevweb02.update.com:80  
 URL Path: http://updevweb02.update.com:80/update.web/v8.sp0/v00.x64/bb/  
 Application Path: /update.web/v8.sp0/v00.x64/bb/  
 Document Path: C:\inetpub\wwwroot\update.web.v8.sp0\v00.x64\bb\web\.\web.data\upload  
 Version: BTBi 8.0.407.46277 (MSSQL)  
 web Version: 8.0.1511.46319  
 Date Format: %D.%M.%Y  
 Time Separator: ,  
 Decimal Separator: ,  
 BTBi 8.0.407.46277 (MSSQL)

Patches:

Plug-ins:

<b>update.Lib.Services 8.0.1601.46319</b> update CRM Common Library Services	<b>update.Configuration 8.0.1601.46319</b> update CRM designer Configuration Business Logic Layer
<b>update.Crm.Base 8.0.1601.46319</b> update CRM Business Logic Base Layer	<b>update.Crm 8.0.1601.46319</b> update CRM Business Logic Layer

3. Click the **Send** button to send the e-mail.

**Note:** Your administrator can define which information is displayed here.

## Searching

In many cases, the search function provides the starting point for accessing the data you require. You can define search criteria to restrict the amount of results returned by the search so as to quickly access the data you need.

## Search Area

The search area is displayed whenever you open an info area from the menu (e.g.

by selecting  **(Accounts) > Business Clients/Associations**):

**Search Business Clients/Associations**

Name

Master data ty...   With me

+ Add more ...

Max. 15 records per page



The search area can be displayed or hidden as required using the **Show** and **Hide** (▲ and ▼) buttons.

If you have hidden the search area after performing a search, the header indicates whether filters are applied to the search:



Your administrator can configure certain options defined for the search area, e.g. determine whether the following options are available when clicking on ⚙️ (**Settings**):

- **Clear Search Criteria:** Removes all search criteria. If you have added additional fields to the search mask, those fields continue to be displayed.
- **Reset Search Settings:** Resets the search mask to the default settings defined by your administrator. The search criteria you have entered are removed and any fields you have added to the search mask are also removed.

## Searching For Data

Use search criteria to narrow your search according to your needs. The available search fields depend on the info area (**Company**, **Person** etc.).

The most important fields are included in the search mask by default. You can however add other fields in order to further restrict your search. Which fields you are allowed to add to the search depend on your access rights.

If you are searching for text, e.g. a company name, and you do not know the exact name or do not wish to enter the full name, enter the first few characters followed by the wildcard "\*". For example, if you search for "Aurea\*", then your results will include "Aurea software AG". If, on the other hand, you were to leave out the wildcard, then the exact match is searched for (i.e. a search for "Aurea" will only deliver results if there is a company whose name corresponds exactly to "Aurea").

To search for records:

1. Switch to the search area.
2. Enter your search criteria.
3. Your administrator can determine that you can access the **With me** option to restrict the results to those records where you are entered as the rep.
4. Choose the number of results to be displayed on a page of the results list. The maximum is 50.

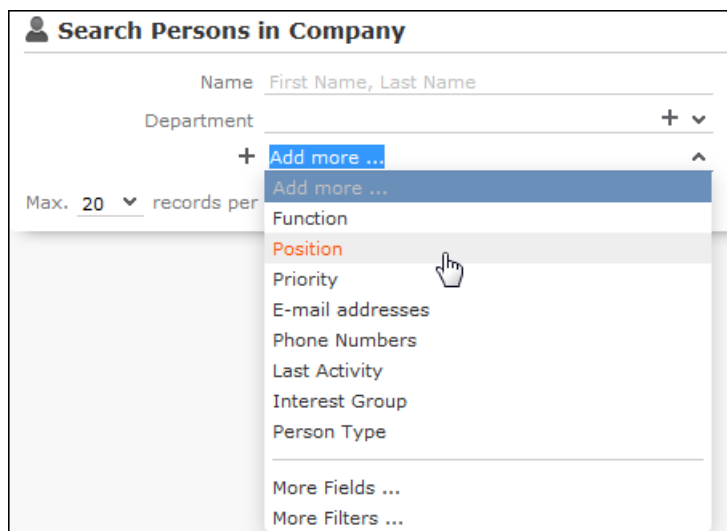
You can define the default number of records per page in the user configuration, >> [Handling Tab](#) on page 55.

5. Click the **Start Search** button. The results of your query are displayed in the results list below the search area, >> [Results List](#) on page 69.

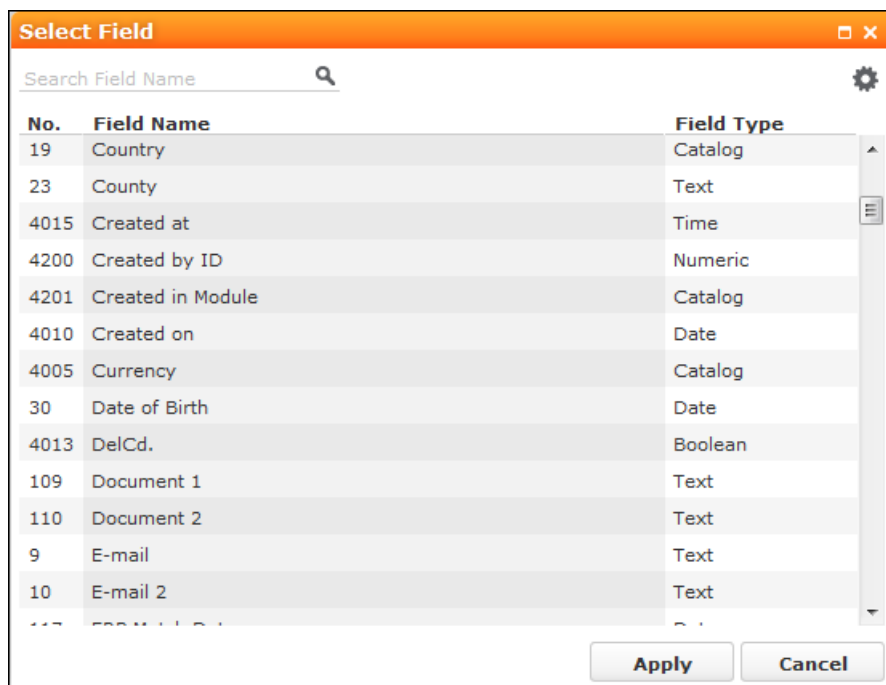
## Adding Additional Search Fields

Your administrator can determine whether you can add additional fields as search criteria. To do so:

1. Click on **+** next to **Add more**.



2. Select the desired field and click on **+** (**Add**) to add the field to the search mask.
3. If the field you want to use is not in the list, select **More Fields** from the list. A dialog containing all fields you can access is displayed.



4. Select the desired field and click on **Apply**.

## Searching in Combined Fields

If the search mask contains combined fields (i.e. fields that combine data from several fields such as a person's **Name**), the system searches for your search term in all these fields. The fields that are combined in the search field are displayed as ghost text:

If you enter a search criteria in a combined field, the system searches for matches in both fields:

The screenshot shows a search interface titled "Search Persons in Company". The search criteria are: Name: jonne aaron, Department: (empty), and a "+ Add more ..." button. Below the search criteria, it says "Max. 20 records per page". The search results are displayed in a table with columns: Last Name, First Na..., Function, and Department. The results show one record: Aaron, Jonne, CEO, Management.

Last Name	First Na...	Function	Department
Aaron	Jonne	CEO	Management

You can enter multiple search terms (e.g. first and last name) in the combined field.

You can also enter a sub-string (e.g. the first few letters of a name). In this case, separate the search terms using a comma and enter the terms in the same order as the fields are listed in the ghost text. The system then searches for the first search term in the first field (e.g. **First Name**) and for the second term in the second field (e.g. **Last Name**) etc.

The screenshot shows the same search interface as above, but with the search criteria: Name: jo,aar, Department: (empty), and a "+ Add more ..." button. The search results are the same as in the previous screenshot: Aaron, Jonne, CEO, Management.

Last Name	First Na...	Function	Department
Aaron	Jonne	CEO	Management

## Selecting Records

Click on a record in the results list to select it. The selected record is highlighted.

You can edit the selected record directly in the list, open the record in the tab or tree view or display additional details in the details view, >> [Tab View](#) on page 29 and [Editing Records in List View](#) on page 82. Child records related to the selected record are displayed under **Related Data**, >> [Editing Records in List View](#) on page 82 and [Tab View](#) on page 29.

## Filters

You can use filters to store commonly used search criteria, and load them to further narrow down your search. For example, you could define a condition specifying that all persons at a certain address should be displayed.

Conditions can be defined for all search areas in Aurea CRM web.

If a filter is active, the name is displayed in the search mask.

---

**Note:** Your administrator can determine that you are not allowed to define filters, but can only select from pre-defined filters.

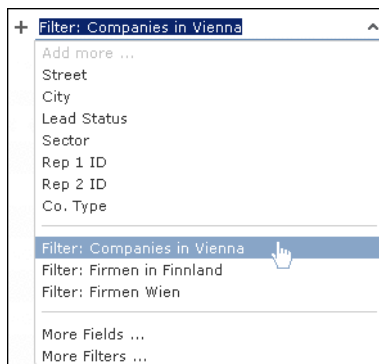
---

## Selecting Filters

If filters have been defined, you can select a filter to restrict the results of a search.

To select a filter:

1. The available filters can be accessed from the drop-down field below the search fields. Select the desired filter from the drop-down list.



2. Click on **+** (**Add**) to add the filter to the search criteria.

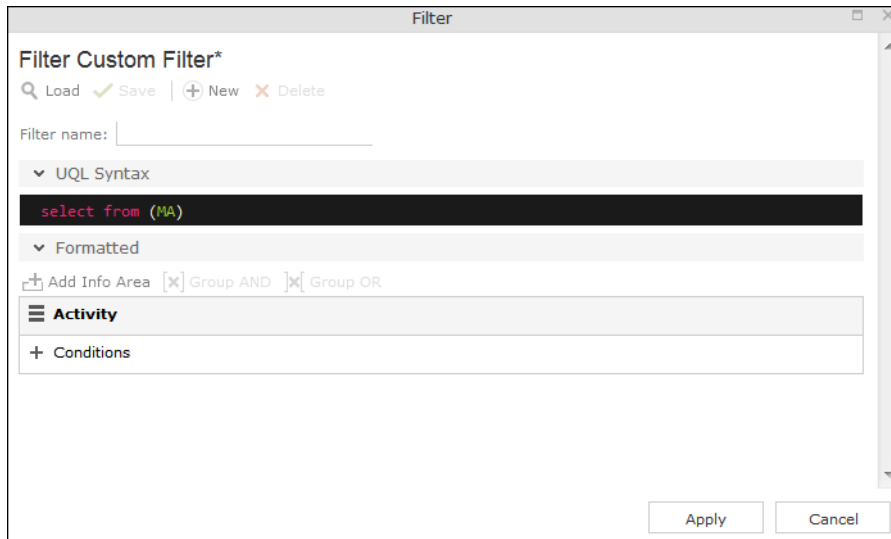
The filter is applied when searching.

## Defining Filters

To define a filter:

1. Click on **Add more** or click on **↓** next to the field and select **More Filters** from the list.

The **Filter** dialog is displayed.



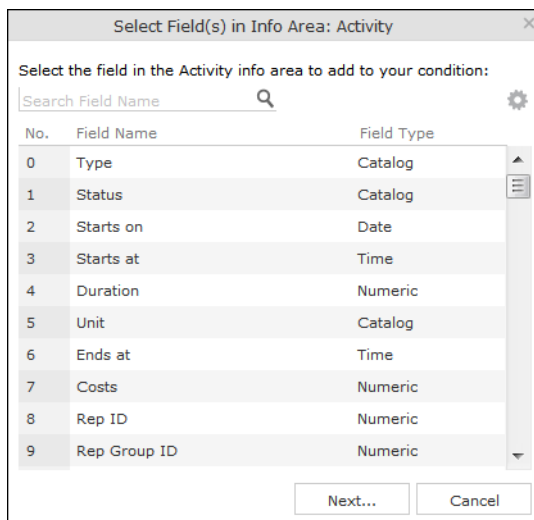
2. Click on **+** (**New**) to define a new filter. Click on **Load** to load an existing filter.

You can define filters in two ways:

- As AQL (Aurea Query Language) in the **AQL Syntax** field. For more information on the AQL syntax, >> *Aurea CRM web Administrator Guide*.
- Using the graphical user interface to select fields and enter filter criteria. This method is described in this manual.

3. Select **Add Condition** from the info area or condition's context menu to define a condition.

The **Select Fields in Info Area: <Info Area>** dialog is displayed. All available fields in the info area are listed.



4. Click on a column heading to sort the list by the entries in that column.
5. Click on **⚙** (**Show/Hide Columns**) to determine which columns are displayed in the list.

6. You can search for a specific field by entering a portion of its name in the **Search Field Name** field.

- Enter one or two letters to list all fields whose name begins with those letters.
- Enter three or more letters to list all fields whose name contains the text you have entered.

You can also search for fields by field number.

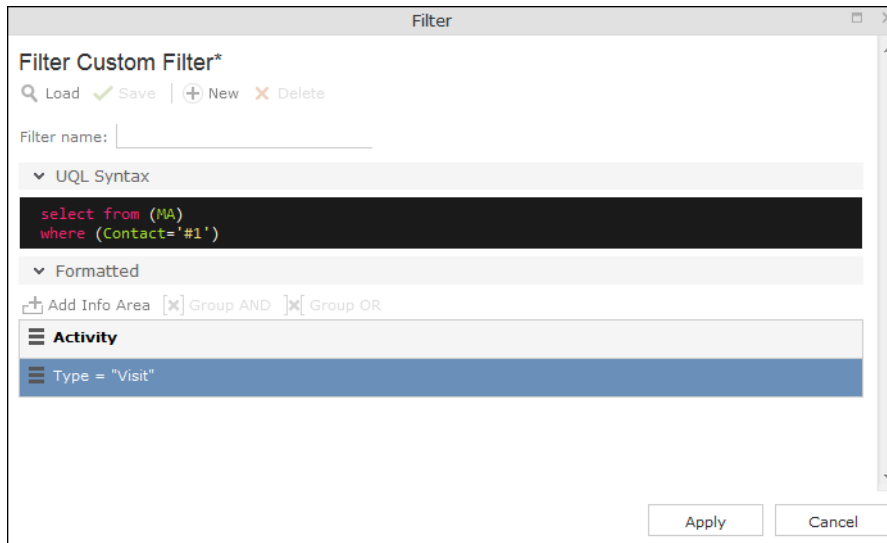
7. Select a field and click on **Next**.

8. Define the condition. The conditions you can define depend on the **Field Type** (as for queries):

- Text fields, >> [Conditions for Numeric, Alphanumeric and Time Fields](#) on page 113
- Date fields, >> [Conditions for Date Fields](#) on page 113 and [Variable Conditions](#) on page 115
- Catalog fields, >> [Conditions for Catalogs](#) on page 110 and [Conditions for Child Catalogs](#) on page 111
- Numeric fields, >> [Conditions for Numeric, Alphanumeric and Time Fields](#) on page 113
- Boolean fields, >> [Conditions for Boolean Fields](#) on page 112
- Time fields, >> [Conditions for Numeric, Alphanumeric and Time Fields](#) on page 113
- Rep fields, >> [Conditions for Rep Fields](#) on page 114 and [Variable Conditions](#) on page 115

9. Click on **OK**.

The filter you have defined is displayed:



10. Define any additional conditions:.

- a. Click on **≡** next to an existing condition and select **Add Condition** from the context menu.
- b. The new condition is linked to the existing condition. To change the logical operator used to link the conditions (AND/OR), click on **≡** next to the operator and select **Change to AND/OR** from the context menu.

11. You can apply the filter without saving it, however it will then not be available in future (after clicking on **Reset** or selecting a different filter).

To save the filter so it can be reused later, enter a name in the **Filter name** field and click on **Save**.

---

**Note:** If you have unsaved changes, an asterisk (\*) is displayed after the filter's name.

---

12. Click on **Apply**. The filter is activated and the search is started automatically.

All results are listed.

## Adding Info Areas

Filters can contain conditions applied to more than one info area.

To add an additional info area:

1. Load the desired filter, >> [Selecting Filters](#) on page 64.
2. Click on **+** (**Add Info Area**).

---

**Note:** All info areas linked to the current info area in the data model and that you are allowed to access are listed in the dialog. Your administrator is responsible for defining which info areas you can access.

---

3. Select the desired info area or enter a portion of its name in the **Search Info Area Name** field. Click on **Select**.
4. A dialog is displayed. Select the type of relationship between the two info areas.
5. Enable the **Optional** check box to link these conditions to conditions applied to other child areas with a logical OR. Records are returned if they meet all non-optional conditions and at least one optional condition.
6. Click on **Continue**.

The filter you have defined is displayed.

## Quick Search

Use the **Quick Search** function at the top right of the screen to quickly search in the most frequently used info areas (which info areas the quick search applies to is defined by your administrator):




To start the quick search:

1. Click in the search field and enter your search criteria. The "Find as you type" function immediately lists matching records:



A maximum of 5 hits per info area are displayed in the quick search. Click on the number next to the info area name (**5+**) to display all hits.

2. The info areas that are searched (in the above example, companies, persons and activities) are determined by your administrator.
3. Click on  to define the info areas that are searched in.





4. The system searches in the info areas where the check box is enabled. Use the check boxes to choose which info areas to search.

## Results List

The results of a search are displayed below the search area in a list.

For example, address details are shown for company search results. This allows you to distinguish between the various branches of the same company.

**Search Companies**

Company

Country  City

From Postal Code  To Postal Code

Co. Type  ABC

Rep

+ Add more ...  With me

max. 15 Records per page Reset Start Search

---

**Search Results** New  Modify List Fields

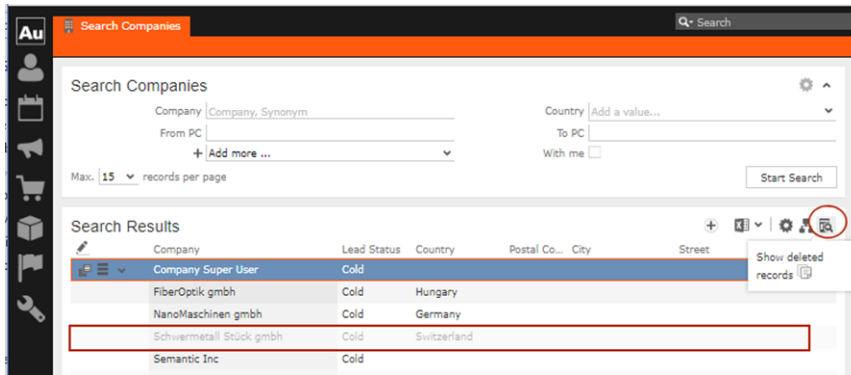
Logo	Company	Lead S...	Country	P...	City	Street
	Krist Austria AG	Cold	Austria	1040	Wien	Operngasse 17 - 21
	Krist Austria AG	Cold	Austria	1040	Wien	Operngasse 17 - 21
	Krist OY	Prospect	Finland	00120	Helsinki	Mannerheimintie 123

If a query returns more results than can be displayed on a single page, use the navigation bar to scroll through the rest of the list, >> [Navigation Bar](#) on page 27.

**Note:** If only one record is found and the **Search: Go to details view when search result is one record** option is enabled in the user settings, the record is automatically opened in tab view, >> [Handling Tab](#) on page 55.

## Viewing Deleted Records in the Results List

Deleted records are not displayed by default in the search result list. Click Display-DeletedRecords ( ) button to display any deleted records in the result list. The deleted records displayed are greyed out and cannot be viewed or edited. The following screenshot shows the button and the deleted record (**Schwermetall Stück gmbh**) visible in the result list.



If the button is not visible contact your system administrator to configure and provide access to view deleted records.

## Column Settings

You can define the position of the columns (fields) in the list.

## Sorting Lists

You can sort your result lists in Aurea CRM web by column in either ascending or descending order.

The column used to sort the entries in the list is color-coded.

A small arrow is displayed in columns you can use to sort entries when moving the mouse cursor over the column header.

To sort entries in a list:

1. Click on the field you want to sort by in the list header, for example, the **Country** column.

Country
Austria
Austria
Austria
China
Finnland
Germany
Germany
Germany
Italy
Italy
Japan
Japan

The entries are sorted in ascending order indicated by an upwards arrow.

2. Click again on the header to sort the entries in descending order.

Country
Japan
Japan
Italy
Italy
Germany
Germany
Germany
Finnland
China
Austria
Austria
Austria

A downwards arrow is displayed in the **Country** column if you hover the mouse over its heading.

## Changing Column Order

You can change the order of the columns in lists using drag & drop. Drag the desired column to the desired position. Two orange arrows show the column's new position.

In the following example, the **Street** column is inserted to the left of the **City** column:

1. Click on the Street column header, and drag it to the left of the **City** column. Two gray arrows are displayed at the column's new position.

Postal Code	City	Phone	Street
1030	Vienna	+43(1) 7876464	Paniglgasse 3
1040	Vienna	+43(1) 8784543	Landgasse 7

## Changing Column Width

The column width is based by default on the length of the fields in the database. You can change the width of your columns.

To change the column width:

1. Position the cursor over the field separator.

Postal Code	City
1030	Vienna
1040	Vienna

2. Drag the separator to the desired position.

## Selecting the Fields in the List

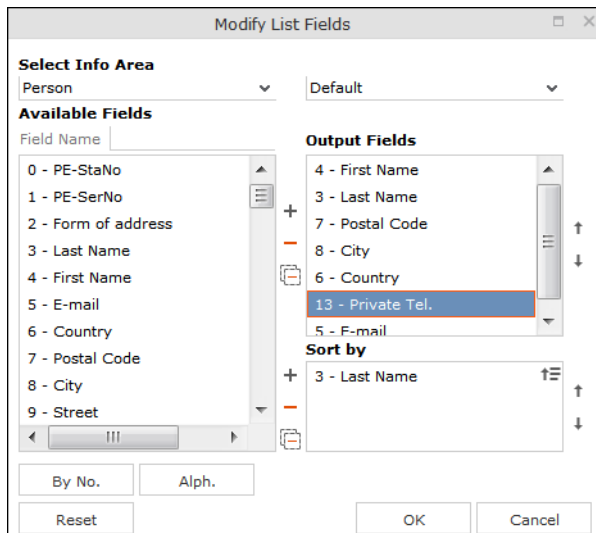
You can determine which fields are displayed in the list.

**Note:** Fields that are not used in the list definition can be configured to be hidden by setting the `HideNotUsedFields` web configuration parameter to true. Contact your CRM administrator to enable hiding the fields that are not used in the list definition.

To select fields:

1. Click on  (**Modify List Fields**).

The **Modify List Fields** dialog is displayed:



The info area that you accessed the search for is entered in the **Select Info Area** field.

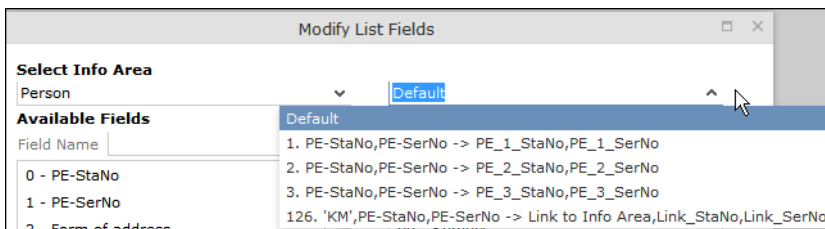
2. Determine which fields to display in the list and the order of the columns:

- **Select Info Area:** Select the info area whose fields you want to display and sort records by. To do so:

Click on ▼ to display a list of the linked info areas:



More than one link may exist between linked info areas, e.g. the **Ticket** info area is linked to the **Person** info area several times. A person can be linked to a ticket as the end customer, contact person or billing address. Select the desired link from the drop-down list to the right of the info area.




If only one link is available, only the **default** option is available.


- **Available Fields:** All fields in the selected info area are listed here.

Click on the **By No.** or **Alph.** buttons to list the fields by field number or alphabetically. Click on the desired field and click on **+** (**Add Field**), or double-click on the field to add the selected field to the list of **Output Fields**.

- **Output Fields:** This area lists the fields that are displayed in the list.

Select a field in the list and click on **-** (**Remove Field**) to remove a field from the list of **Output Fields**. Click on  (**Remove All**) to remove all fields from the list. Click on **↑** (**Move Up**) and **↓** (**Move Down**) to change the order of the fields.

- **Sort by:** This area contains the fields that records are automatically sorted by. To transfer a field from the list of **Output Fields**, select the field and click on **+** (**Add Field**).

To remove a field, select the field and click on **-** (**Remove Field**). Click on  (**Remove All**) to remove all fields from the list. Click on **↑** (**Move Up**) and **↓** (**Move Down**) to change the sort order.

The icon next to sort fields indicates whether the entries are sorted in ascending (↑) or descending (↓) order by default. Double-click on a search field to change the sort order.

---

**Note:** If no sort fields are defined (or only one sort field is defined and several records contain the same value in this field), the same records are sometimes displayed when switching between pages in the results list. To prevent this, define sort fields such that the sort criteria is unique.

---

3. Click on **OK** to apply your settings.

Click on **Restore Defaults** to restore the default settings. Click on **Cancel** to discard your changes.

## Adding Records

Depending on your user type and access rights, you can add various types of information to the Aurea CRM database.

### Adding New Records

There are several ways in which you can add records to Aurea CRM web. In general, it is possible to differentiate between independent records (such as companies or campaigns; i.e. those records with no parent records) and child records (such as persons or activities).

In most cases, you need to can start the search and then click on ⊕ (**New**).

### Adding New Independent Records

Independent records can be added using the menu options (e.g. **New Master Data**) or using the ⊕ (**New**) button in the list view. The mask used to add new records is displayed.

In certain info areas, such as **Company** or **Person**, Aurea CRM web matches up new data with existing records to prevent duplicate records from being added to Aurea CRM's database, >> [Match-up](#) on page 79.

## Example: Adding a new company

This example illustrates how new independent records are added and can be applied to any info area.



1. Select **(Accounts)** > **Business Clients/Associations** from the menu to open the search area.
2. Click on **Start Search**.
3. Click on **(+)** (**New**) in company search's results list.

Select the type of company, e.g. **Business Client**.

The **New: Business client** page is displayed.

4. Enter all the relevant information.
5. Click on **(✓)** (**Save**). Aurea CRM web automatically checks whether the company is already stored in the database, >> [Match-up](#) on page 79.

The company is displayed in the default view after being saved.

## Adding new Child Records

Records that are associated with a parent record (e.g. persons in a company) can be added in two ways:

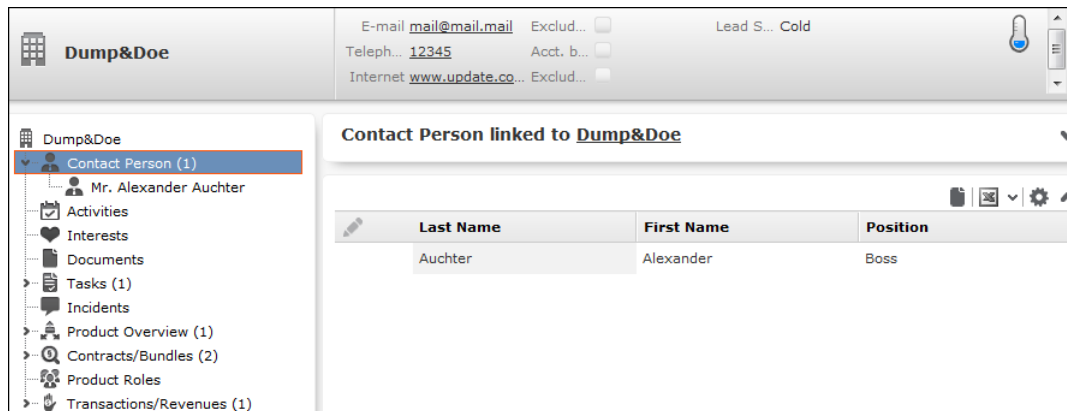
- In the tree view, >> [Adding Child Records in the Tree View](#) on page 75.
- In sub-lists, >> [Adding Child Data from Sub-lists](#) on page 76.
- From search results, >> [Editing Records in List View](#) on page 82.

### Adding Child Records in the Tree View

You can add new child records from a parent record's tree view, e.g. add contact persons to a company. The child records are linked to the parent record.

To add a new child record:

1. Switch to the parent record.
2. Click on the target info area (e.g. **Contact Person**) in the tree. Existing records are listed in the working area.



3. Click on **(+)** (**New**). The input mask is displayed.
4. Enter the data.
5. Save.

### Adding Child Data from Sub-lists

Some info areas are not displayed in the tree but are displayed as sub-lists at the bottom of the working area.

To add a child record from a sub-list:

1. Switch to the parent record, e.g. a contract.



**Contract Life insurance**

Product Master Contract number 095323812  
 Contract type Contract Name of contract Family life insurance  
 Product Group Personal Insurance Sub-product gr... Life insurance  
 Origin of data Foreign Value  
 Annual Net Pre... Contract starts ...  
 Contract ends on Premium  
 Payment Method Institute  
 Currency EUR Active   
 Consultant  
 Text

Links Details Bank Account

Bundle Familienabsicherung - 095244149

Role	Product/Contr...	Company...	Person
Account holder	Family life insuranc...		Mr. Hans Wurst

2. Click on the desired tab under **Related Data**.
3. Click on **+** (**New**). The input mask is displayed.
4. Enter the data.
5. Save.

## Adding Child Records from Anywhere


Child records can also be added without accessing the parent record. Click on **+** (**New**) in info area's search results to add a new record. When adding a child record, the system guides you through the necessary steps.

## Adding new Records Supported by a Process

If additional steps are required in order to add a record, you are guided through these steps. For example, you need to select a company or person when adding an activity with a customer.

### Example: Adding an Activity

To add a new activity:

1. Select  (**Collaboration**) > **Activities**, click on **Start Search** and then on **+** (**New**).
2. The **New Activity** page is displayed.

**New Activity**

▲ **Create New Activity**

**To add a new activity:**

Choose whether to add the activity for a company, person etc.

Search for the company/person etc. or create a new one.

Enter the activity details.

▲ **With whom do you want to create the activity?**

Person Business Clients/Associations Person in Company

▲ **Choose from Favorites**

**Persons**

Carla van der Haferfield

John Doe

Tina Stein-Rudolph

**Companies/Associations**

Dump&Doe

Nieten und Nägel AG

Wirtschaftsverbund Hafer

▲ **Recently used customers**

**Persons**

Hans Wurst

- Choose whether you want to add an activity for a person, business client/association, a person in a company, a record in your favorites or a recently used customer. In this example, an activity is added for a person.

The person search is displayed.

- Search for the person you want to add the activity for.

**New Activity**

**Search Persons**

Name

+ Add more ... With me

max. 15 Records per page

**Search Results**

Last Name	First Name	Street	City
Doe	Little John		
Doe	John	Operngasse 17-21	Wien
John	Monika		

- Double-click on a the desired record or select **Select** from the record's context menu.
- Enter the necessary data, e.g. additional participants.

**New: Activity**

\*Starts on 07.02.2014 Ends on \_\_\_\_\_ Type Telephone

Status Planned Starts at 16:39 Ends at \_\_\_\_\_

\*Subject Discuss loan framework Private

Text

Finalise details re guarantees

Internal Participants Qualification

Rep Stephen Sales Assigned by \_\_\_\_\_

Participant(s) Required Stephen Sales X Add a value...

Optional Add a value...

For Information Add a value...

7. Save the record.

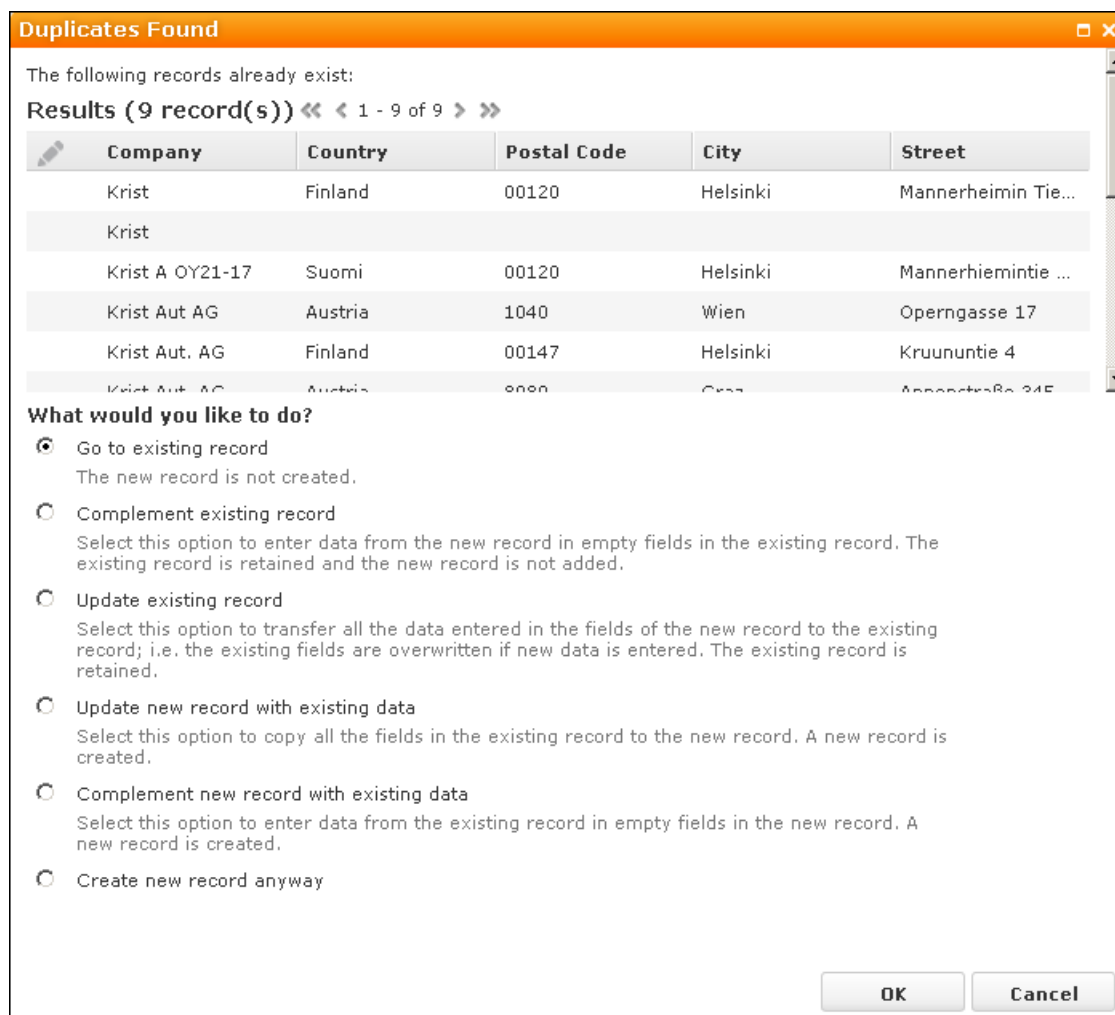
## Match-up

To prevent duplicate records from being added to the database, new records are matched up with existing records in the database.

Your administrator can define:

- That similar sounding names are listed (phonetic match-up)
- That new records are always saved without being matched up.
- Whether persons are matched up with all persons in the database, or only those in the same company.

If a similar record is found in the database, the **Duplicates Found** window is displayed. If more than five similar records are found in the database, use the navigation bar to switch between records, >> [Navigation Bar](#) on page 27.



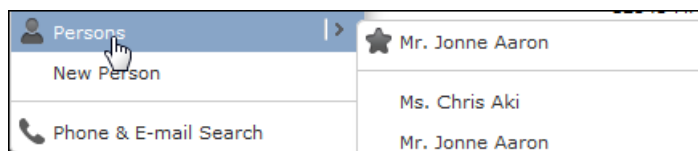
Select one of the available actions and click on **OK**.

## Editing, Viewing and Deleting records

Records can be edited, displayed or deleted.


You can display records as follows:

- Start the search, enter search criteria and search for the record you wish to display.
- Depending on your configuration, you can open your favorites and recent records from the navigation bar, >> [Favorites](#) on page 22 and [History](#) on page 21.



You can edit records in list and tab view. You will be asked to confirm the deletion of records, >> [Editing Records in List View](#) on page 82, [Editing Records in Tab View](#) on page 81 and [Deleting Records](#) on page 86.

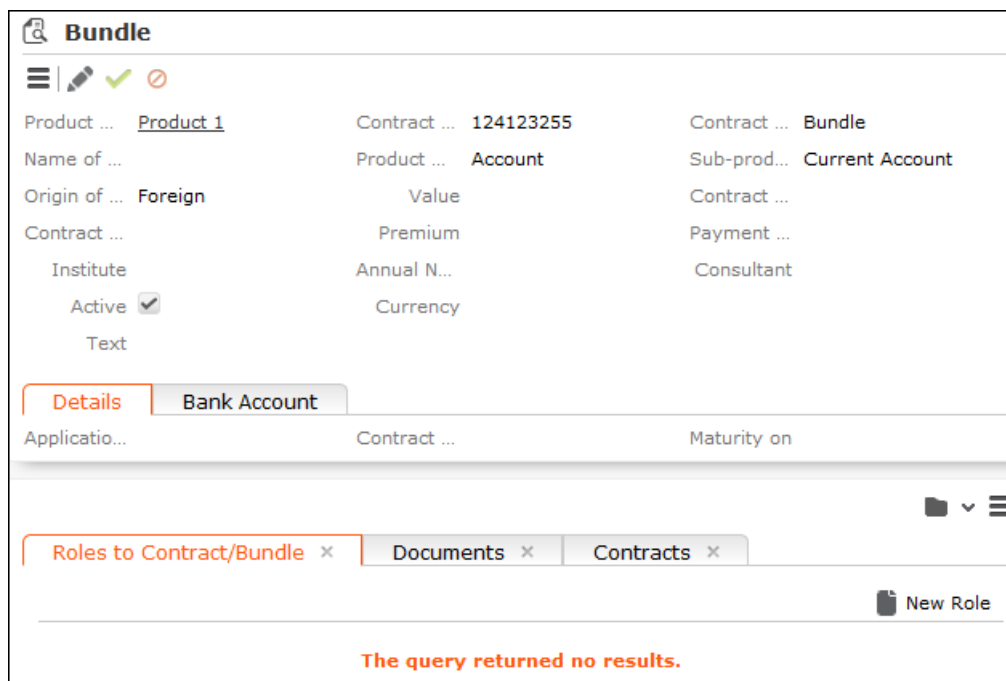
**Note:** Whether you are able to edit or delete records depends on your access rights, defined in your Aurea CRM web profile.

By default, data is displayed in view mode to prevent unwanted changes to data. To edit the data, click on  (**Edit**) or double-click on the record.

## Editing Records in Tab View

To edit data in tab view:

1. Select the record you want to update in the results list.
2. Double-click on the record or select **Open** from the context menu left of the selected record.
3. The record is displayed in the tab view.

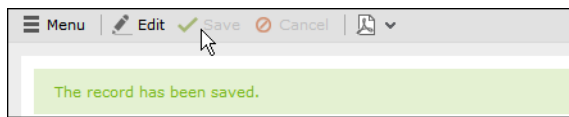


You can now update the record or simply view the details in the tab view.

4. Click on the **Save** button.

## Feedback on User Actions





Aurea CRM web informs you about actions as they are performed, e.g. that a record was saved or that data is missing in a mandatory field. These messages are displayed under the header containing the buttons.



Additional messages such as system messages or information that a record has been added to your favorites are displayed in the inbox, >> [Inbox](#) on page 25.


## Buttons in the Tab View

The following functions are available for certain fields in tab view:

- Click on the **e-mail** icon  to the right of the e-mail address to send an e-mail.  
This does not work if you are using unicode character sets, in which case your e-mails need to be sent by the server. If you have configured you system to send e-mails from the client, you need to write and send your Unicode e-mails in your e-mail client and add the corresponding activity records to Aurea CRM web manually.  
You cannot add attachments to e-mails sent by the client.
- Click on a URL to access the company's website entered in the company record.
- Click on  to enter a rep using the rep catalog.
- Click on  (**Make Call**) while in edit mode to call the number using CRM.phone. CRM.phone must be installed to use this button.  
If several telephone numbers have been entered for a company or person, your administrator can determine that you can select the desired number from a list.
- Click on  to link the current record **with a record in another info area**. The search dialog is opened, allowing you to search for the record you want to link to. Double-click on the desired record or choose **Select** from the context menu to confirm the link.
- Click on **+** (**Find or Add Catalog Values**) to search for or add catalog values.
- Click on **▼** (**Select Date**) next to a date field to open the date picker.




## Editing Records in List View

To edit records in list view:

1. Click on  (**Edit list**) in the list header to edit the selected record directly in the list view. Alternatively, you can click slowly on the field twice in succession to switch to edit mode.

---

The first editable field in the list or the field you clicked on twice is automatically displayed in edit mode, and you can make any necessary changes. The following input methods are available for the following field types:

- Select catalog values from the drop-down list, >> [Catalog Fields \(Drop-down Lists\)](#) on page 41.
  - Select reps from the dialog box, >> [Rep Fields](#) on page 44.
  - Use the small calendar to enter dates, >> [Date Fields](#) on page 43
  - Click on  (**Select**) next to a link field to select a record in another info area, >> [Link Fields](#) on page 45.
2. Click on the **Save** button () to the left of the record you are currently editing to save your changes, or click on the **Cancel** button () if you wish to cancel any changes.

---

**Note:** Your administrator can disable editing records by clicking twice.

---

## Editing Multiple Records in the List Simultaneously

You can select, edit and delete multiple records in the list.

### Selecting Multiple Records

There are two way of selecting multiple records, as in Windows:

- Press the Ctrl key and select the desired records using the mouse.
- Press the Shift key to select **all** records between the current record and the record you subsequently click on.


---

**Note:** Selecting multiple records is only possible for records displayed on the same page in the results list. You cannot navigate to other pages using the cursor keys without losing the current selection.

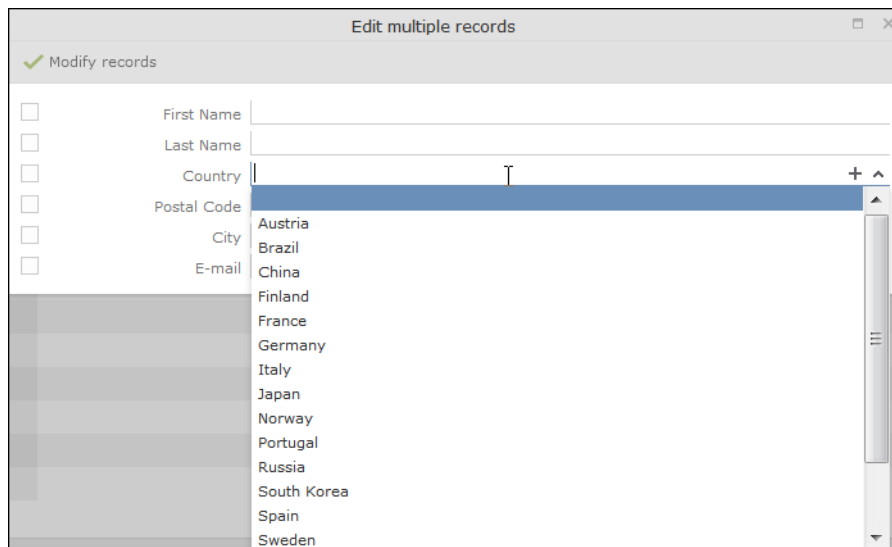
---

### Editing Multiple Records

To edit multiple records in a list:

1. Select the desired records, >> [Selecting Multiple Records](#) on page 83.
2. Click on  (**Show Menu**) next to one of the selected records.  
The context menu for editing multiple records is opened.
3. Select **Edit** from the menu.

The fields displayed in the list view are displayed:



If all selected records contain the same value in a field, the value is displayed. Otherwise the field is empty.

#### 4. Change the content of the desired fields.

The check box to the left of a field is enabled if you change the field's value. If you do not want to apply the change, disable the check box.

Move the mouse cursor over the check box to display the original value as a tooltip.

To delete the values in a field in all records, enable the check box (and delete the value in the field if necessary).

#### 5. Click on **Modify records**.

The changes are applied to all selected records.

## Deleting Multiple Records

To delete several records in the list at once:

1. Select the desired records, >> [Selecting Multiple Records](#) on page 83.
2. Click on **≡ (Show Menu)** next to one of the highlighted records.
3. Select **Delete** from the menu.

The selected records are deleted from the database.

## Editing Data in Predefined Processes

Guided processes lead you through the steps necessary to add or edit certain data, depicting work processes in Aurea CRM. These processes are divided into multiple phases. For example, opportunities progress through a number of phases which differ by industry and the business processes in your company.



A process is split into individual phases and tasks are assigned to these phases. Some of these tasks can be mandatory, which means that the process cannot proceed to the next phase until these tasks have been completed. For example, opportunities tend to be structured in phases such as identification, qualification, offer and conclusion.

When editing data, only one phase is currently active. The active phase is displayed in the process's header in orange.

**Christinas Opp**  
A non existing company vvvvvv  
Simon Seller Test

Identification | **Qualification** (1/1, 0/0, 20%/10%) | Cover Buying Center | Offer | Negotiation | Completed

-59 days until completion  
Probability: 20,00%  
Total Prod. Value: 0 EUR  
Weighted Opp. Value: 0 EUR

**Overview**

Opportunity type: Initial Project  
Status: In Progress  
ABC  
Reason  
Quick Opportunity:   
No Competitor:

Completion Date: 08.01.2013  
Probability completion d.: Unlikely  
Investment Prob. (%): 20,00%  
Probability (%): 20,00%  
Likelihood: Risky

Budg.curr.Year  
OP Wtd. Total Prod. Value  
Total Prod. Value  
Currency: EUR

Depending on your configuration, you may be able to switch back and forth between phases, or you may only be able to proceed to the next phase once you have completed all the necessary steps.

Help texts and icons are defined for each phase and for the whole process that provide you with information on the current status and what tasks need to be completed.

**Christinas Opp**  
A non existing company vvvvvv  
Simon Seller Test

Identification | **Qualification** (1/1, 0/0, 20%/10%)

Creation of the Opportunity. Enter the relevant data you have.  
To proceed to the next phase you need to:

- add at least 1 Participant
- add at least 1 Activity

**Overview**

Opportunity type: Initial Project  
Status: In Progress  
Probability con

Your administrator can determine that the arrows representing inactive phases and/or all phases prior to the current phase are minimized.

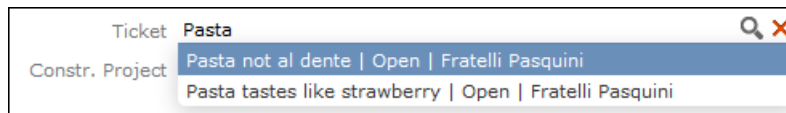
1 | 2 | **3 - Cover Buying Center** (0/1, 0/1) | 4 - Offer | 5 - Negotiation

## Linking Records

You can enter links to other records in some info areas, e.g. enter a link to a ticket in an activity. Which records you can link to is defined by your administrator.

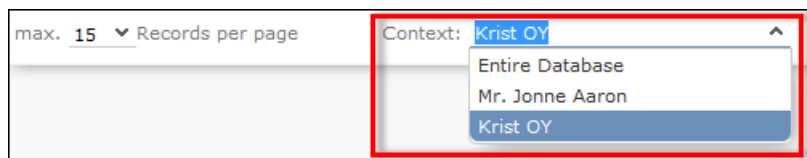
To search for the linked record:

- Enter all or a portion of the record's name in the link field. Any matching results in the target info area are listed.



- Click on **Q (Select)** to search for the desired record. Select the search context before starting the search. Your administrator can determine whether you can choose to search for the target record in the current context (i.e. a record related to the current record or its parent record) or in the entire database.

In the following example, the current record is "Mr. Jonne Aaron" and the parent record is "Krist Intl. OY":



## Deleting Records

To delete records:

1. In the results list, select the record you want to delete.
2. Click on **☰ (Show Menu)** to the left of the desired record to open the context menu.
3. Select **Delete** from the menu.
4. Confirm that you want to delete the record.

The record is deleted and is no longer displayed in the results list.

## Copying the Link to a Record to the Clipboard

You can copy the link to a record to the clipboard, for example to include it in an e-mail.

Your administrator is responsible for determining which types of links to records you can copy to the clipboard.

To copy a link to the clipboard:

1. Switch to the desired record (in tab view) or select the desired record in list view.
2. Select **Copy Link to Clipboard** from the context menu.
3. You can then paste the link from the clipboard into another application.

---

**Note:** For security reasons, not all browsers permit you to copy data to the clipboard. If you are not permitted to copy data to the clipboard, a popup message is displayed that contains the link (already selected). You can then use Ctrl+C to copy the link from the popup to the clipboard.

---

## Displaying a Record's History



You can display the history of records in some info areas (provided you have the necessary access rights). Changes in the history include both those made manually by users and those carried out automatically (e.g. as a result of importing data, triggers or the business logic).

If available, the history is displayed in a tab in the **Related Data** area. For performance reasons, the history is not always updated immediately after each change.

To display the history:

1. Switch to a record in an info area that includes a history (e.g. **Company** or **Activity**).
2. Click on **History** under **Related Data**.

The history of changes is displayed. The following options are available:

- Click  (**Most Recent Changes**) to display the most recent changes to each field. Edits are sorted by date and time.
- Click  (**All Changes**) to display all changes. Edits are sorted by field name.

## Exporting




Aurea CRM web allows you to export records in various formats such as Excel or PDF files.



---

**Note:** Your administrator is responsible for determining which export formats are available in which views and info areas.

---

Examples:


-  Microsoft Excel (current page)
-  Microsoft Excel (all records)
-  Microsoft Word

-  HTML (corresponds to a web-based print preview)
-  PDF (the document cannot be edited).

All fields (including empty fields) are exported.

## Exporting from Tab View

You can export the data displayed in tab view in some info areas. The following options are available to export data:



- Click an export button, e.g.  (**Microsoft Excel**).
- Click on a button used to generate a predefined report, e.g. the **Fact Sheet** button in the tab view of a company.

## Exporting from a List

When exporting data from a list, only those records displayed in the list are exported, with the exception of the **Export all** options for MS Excel and CSV files. If 50 records are displayed in the list, the export file will thus contain these 50 records.

If you mark one or more records in a list and click on an export button, only the marked records are exported. If no record are marked, all records are exported.

To export data in a list:

1. Search for the records you want, e.g. all companies in Austria.
2. The default export functions are available by clicking on  ▾.
3. Click on ▾ and select the desired option, e.g.  (**Export (MS Excel)**).
4. Save the file.
5. Enter a name for the file and choose the desired directory to save it in.
6. Click **Save**.

The records are exported to the file.

## Reps

Reps are persons (usually the employees of your company) that edit CRM data in the system. Reps can be entered in various fields in record, depending on their tasks. For example, a rep may be entered in an activity as a sales rep or the creator of the record.

## Selecting Reps

Reps are entered using the **Select Reps** dialog box. Click on a rep icon to open the dialog. You can choose to display the available reps as a list, tree structure or (if configured) hierarchy. The list is displayed by default.

To reduce load times, your administrator can define the maximum number of reps that are displayed in the dialog box. If the number of reps available exceeds the maximum number that are loaded, "..." is listed at the end of the list of reps. Click on this entry to display further reps.

Your administrator can also define which reps you can select. Only those reps you can select are listed. Reps set as internal (system) reps are not listed by default.

Inactive reps or rep groups are displayed in light gray. Inactive reps can only be selected for the following functions: search, conditions, queries, analyses and in the resource view.

## Selecting Reps from the List

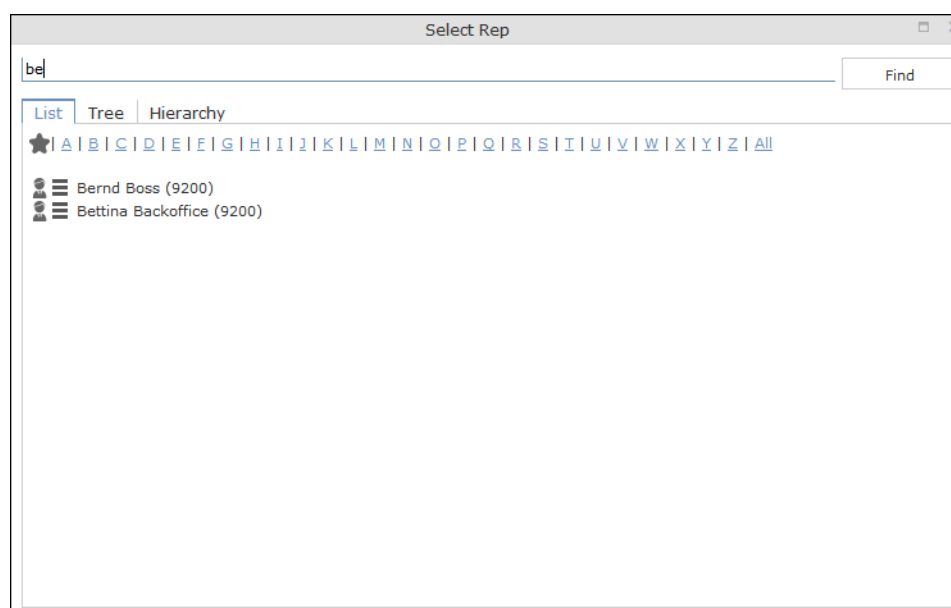
When entering a rep in a rep field, you can select the rep from either the list or tree view. By default the list view is displayed.

To select a rep from the list view:

1. Click on the  (**Select Rep**) icon to the right of the field.

The **Select Reps** dialog box is displayed.

2. Click on a letter or enter the start of the rep's name and click on **Find**.



3. Double-click on an entry or choose **Select** from the rep's context menu to enter the rep in the field.

**Note:** If you search for a rep in the tree or hierarchy view, the results are displayed as a rep list. If a filter has been applied to the rep selector, your favorites (★) are unavailable.

---

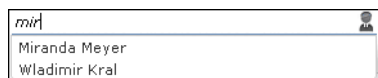
## Selecting Reps with the "Find as you type" Function

If you enter a portion of a rep's name into a rep field, only those reps are listed whose names contain the string you entered. Your administrator can determine the minimum number of characters you need to enter to search for reps by name.

To search for a rep by entering a portion of the rep's name:

1. Enter all or a portion of the rep's name in the **Rep** field. Depending on your configuration, the following entries are listed:
  - Reps whose names begin with these letters
  - Reps whose name contains the text

A list containing all matches is displayed.



If only one match is returned, the name of the rep is automatically completed.

2. Click on a name, if more than one rep meets the search criteria.  
The selected name is entered in the rep field.

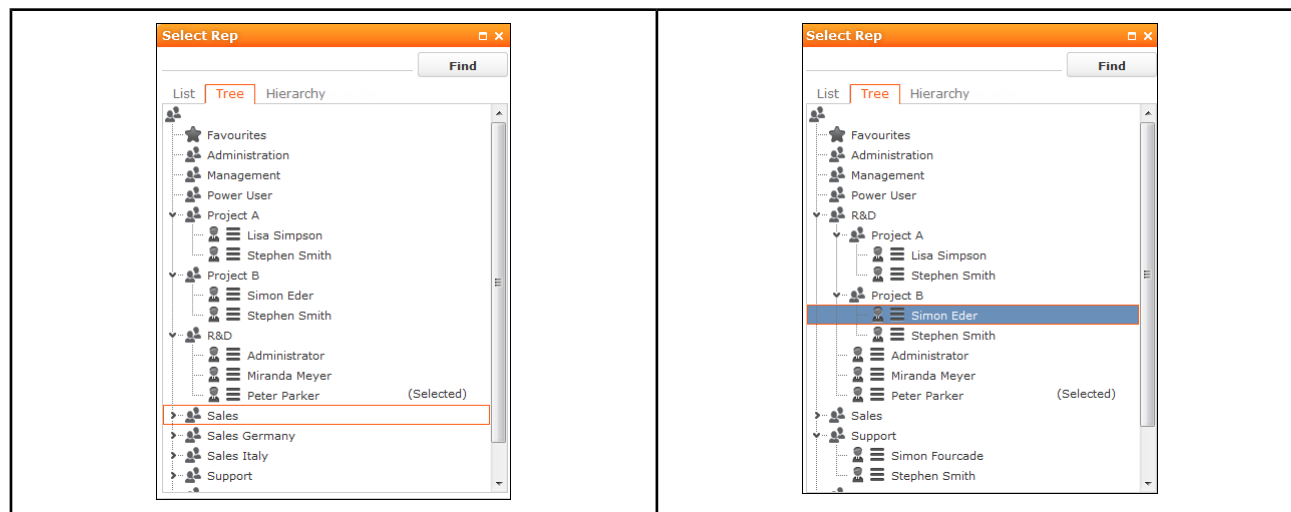
## Selecting Reps from the Tree View

To select a rep from the tree view:

1. Click on the  (**Select Rep**) icon to the right of the field.

The **Select Reps** dialog box is displayed.

- Click on the **Tree** tab.



- The reps are displayed in tree view. Each rep is accessible from the group they have been assigned to. Use the ▶ and ▼ to expand or contract the tree structure and display the reps allocated to a group.
- Double-click on the entry or choose **Select** from the rep's context menu to enter the rep in the **Rep** field.

## Rep Favorites

If you require a certain rep regularly (e.g. yourself for internal activities, or co-workers that you regularly represent), you can use your favorites to access these reps quickly.

To add a rep to your favorites:

- Search for the rep.
- Select **Add to Favorites** from the context menu.

The rep is now added to your favorites, and is displayed in the **Favorites** group.


## Default Values

Aurea CRM web includes default values for various info areas. If you have the necessary privileges, you can edit these default values yourself or define new ones. For example, if most of your contact with customers is by e-mail, you can define them as the default activity type.

Your administrator can define that the language you select when logging on is entered as a default value, for example in search masks or when adding texts.

## Defining Default Values

To define default values, for example for activities:

1. Click on <sup>[101]</sup> (**Default Values**) in the activity search.
2. Define the default values.
3. Click on  (**Save**) to save the default values.

The **Save default values** dialog box is displayed.

Enable the **Lock** check box to save your default values as read-only.

Enable the **Private** check box to prevent other users from accessing the default values (i.e. they only apply to you).

4. Enter a **Name** and click on **Save**.

The default values are saved, and you will be asked if you wish to activate the defaults you just saved.

5. Click on **Yes** to automatically apply these values to new activities.


---

**Note:** Default values must be saved under unique names. If you save two sets of default values for different info areas under the same name, the default values will no longer be displayed correctly.

---

## Applying Default Values

To apply a previously defined set of default values:

1. Click on <sup>[101]</sup> (**Default Values**) in the search mask.
2. Click on  (**Load**) in the **Default Value** dialog box.  
The **Load default values** dialog box is displayed.
3. Select the set of default values from the list and click on **Load**.
4. Click on  (**Apply**) to use the default values automatically in future when adding new records.



---

## Resetting Default Values

To remove default values that have been defined:

1. Click on <sup>[101]</sup> **(Default Values)** in the search mask.
2. Click on **✖ (Reset)**.
3. Confirm the prompt with **Yes** to continue working without default values.

The default values are reset to the standard settings.

## Calendar

The calendar displays activities, tasks, absences and To-Dos.

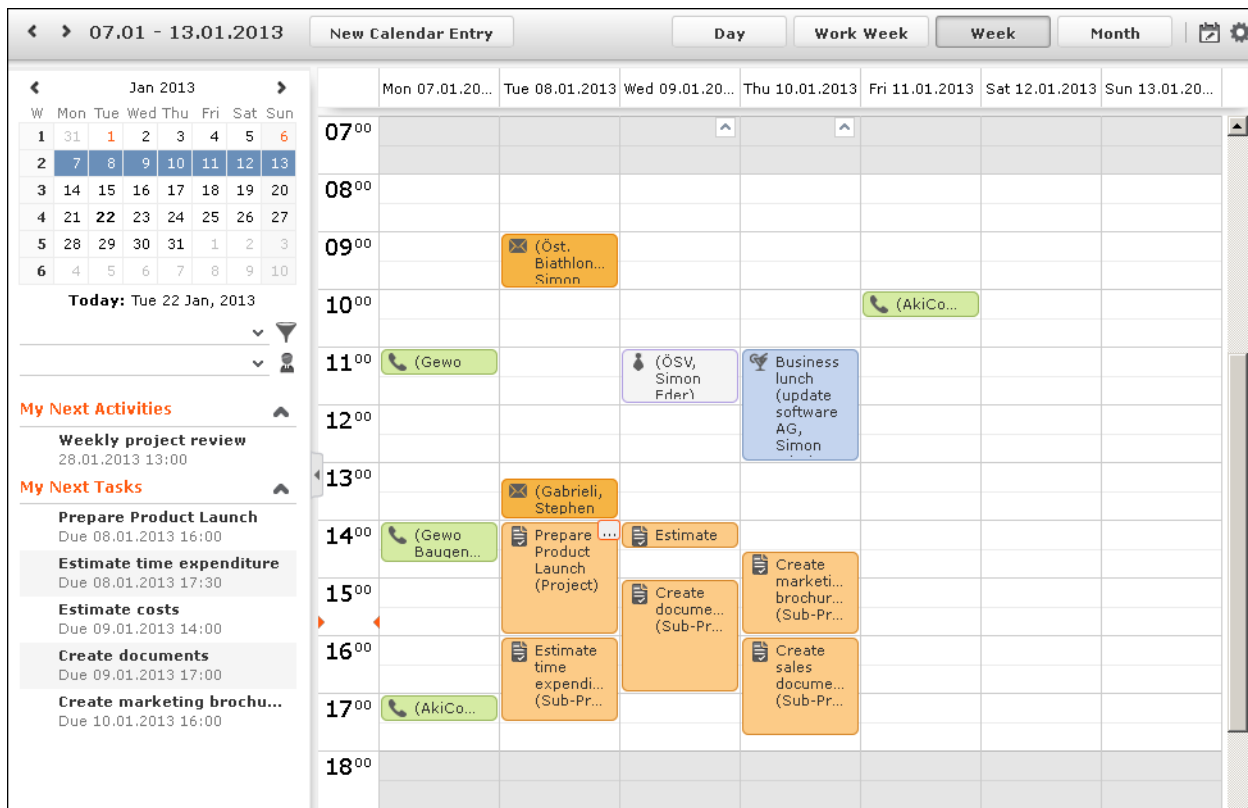
You can define which holidays are displayed in your calendar, the data displayed in the left sidebar etc. in the user configuration, >> [User Configuration](#) on page 54.

---

**Note:** For a more detailed description of the calendar and information on adding activities can be found in the Appointment Management chapter of the industry solution manual.

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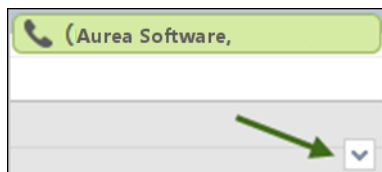
The calendar in Aurea CRM web contains the following elements:



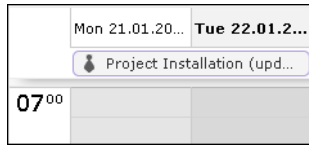
- Different types of appointment are indicated using different icons (for telephone calls, visits etc.).
- You can determine that certain entries are color-coded, e.g. based on the type of appointments or status (⚙️ **Edit Settings**).
- Click on the entries in the header to determine whether to display a **Day**, **Work Week**, full **Week** or **Month** in the calendar.
- The orange cursor in the time bar indicates the current time.



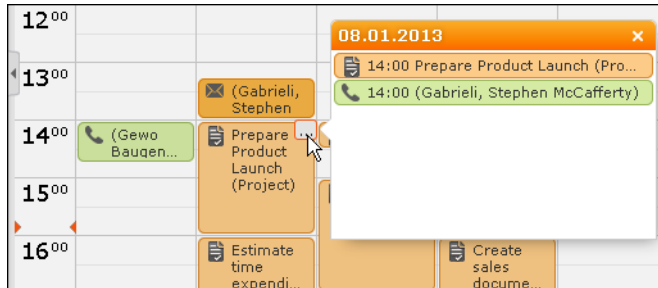
- If appointments have been entered that cannot be displayed in the visible area, the following icon is displayed at the bottom edge of the visible area:



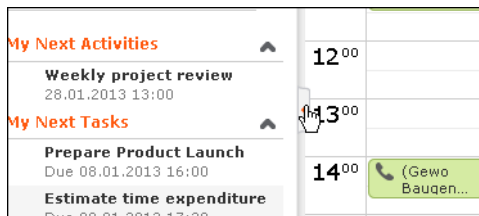
- Appointments lasting all day or spanning several days are displayed in a bar at the top of the calendar (below the date).



- Concurrent appointments cannot be displayed in the week view of the calendar. Click on "... " to display these appointments in a new window.



- Only a limited number of appointments can be displayed per day in the monthly view. Click on **+ x more** to display all the appointments in a separate window.
- Whether the sidebar is displayed when you open the calendar depends on your role. You can display or hide the sidebar:



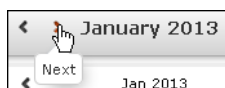
Your upcoming activities and tasks are displayed in the left sidebar. You can also select and define filter sets or rep groups.

- Holidays are color-coded.

## Navigating in the Calendar

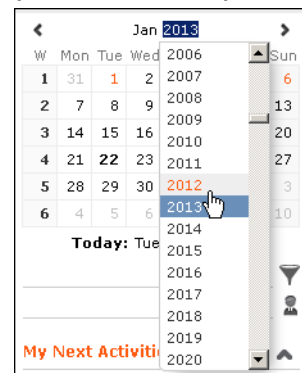
You can navigate in the calendar using the following options:

- Use the arrows to switch between pages in the calendar:




- You can use the calendar in the sidebar to:
  - Click on a day to switch the view to just that day.
  - Click on a calendar week to display that work week.

- Click on the month or year and select an entry from the drop-down list update



the calendar accordingly (the view type remains unchanged).

- Use the arrows to move forward or back one month
- When in the day view, hold down Ctrl and click on days in the calendar to display multiple days at once.
- Click on **Today** to display the current date in the day view.
- Click on  (**Daily & Weekly Planning**) to open the daily and weekly planner, >> [Daily and Weekly Planning](#) on page 96.

## Daily and Weekly Planning

You create appointments using drag&drop in the daily and weekly planning area. By default, the daily and weekly planning area displays the person search, results list and calendar.

Click on  (**Daily and Weekly Planning**) in the calendar to switch to the Daily and Weekly Planning area.

## Timelines

The timeline allows you to display an overview of your contact with customers chronologically, e.g. activities, offers etc.


The selected records are displayed along a time axis in so-called "bubbles". You can configure the overview to display different types of records using different colors, icons and text.

By default, timelines are available from the following areas:

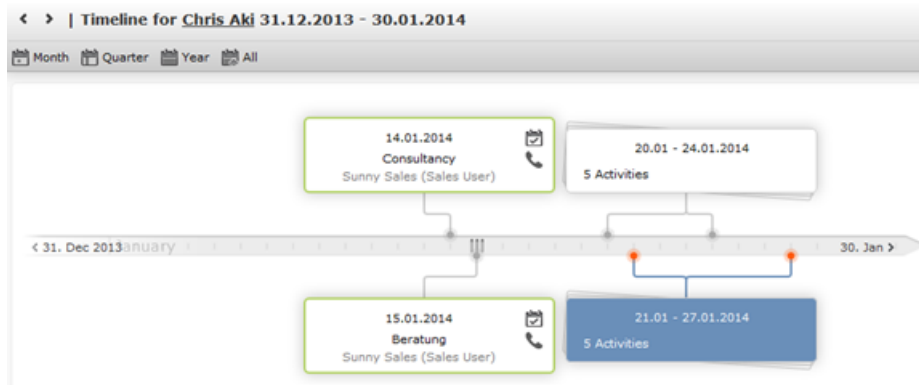
- In the **Company**, **Opportunity** and **Property** info areas.
- The **Marketing Timeline** if available from the **Company** info area.


You can add comments from timelines.

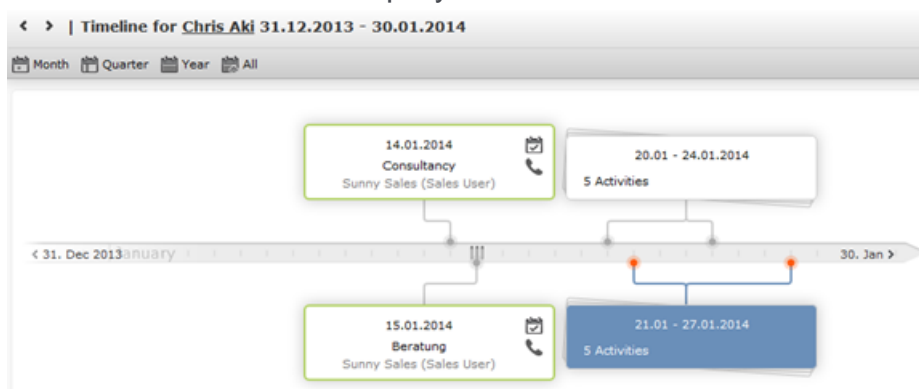
To display a timeline:

1. Switch to the desired company or person, >> [Searching](#) on page 60.
2. Select **Timeline** from the context menu or click on  (**Timeline**) in the record's header.

The timeline is displayed.



3. Click on **Month**, **Quarter**, **Year** or **All** to select the time period to display.
4. You can navigate forwards and backwards in time as follows:
  - Click on **◀ (Previous)** or **▶ (Next)** to switch to the previous or next time period.
  - Click on the gray bar to change the time period:
    - If you are displaying the entire time period (**All**) or the yearly view, the display switches to the quarterly view.
    - If you are displaying the quarterly or monthly view, the view switches to the previous quarter or month.
5. Drag the  icon in the scroll bar to the left or right.
6. Click on the date at the far left or right of the scroll bar to move to the previous or next time period.
7. Click on a bubble to display the details of the record beneath the timeline.



---

**Note:** Your administrator can determine that bubbles containing only a single record are color-coded by info area. Example: All bubbles containing data from marketing-related info areas are displayed with a blue border.

---

If a bubble contains multiple records, a list of all records in the bubble is displayed on the left beneath the timeline. The currently selected record's details are displayed on the right.

8. Click on a bubble containing multiple records to display all the records in the bubble in the weekly view.

## Queries

You can define, load, and execute complex queries in Aurea CRM web and define queries for other users.

Queries can be applied to data across multiple info areas. Your administrator can determine that fields in other info areas are displayed as links. Click on a link to switch to the default view of the associated record.

CRM does not perform linking on the database server for 1-N links. The workaround, in this case, is to modify the query statement. For more details, see [1-N links handled on data access layer](#) on page 123

## Rights

Global and private queries are available. Your administrator defines which ones you are allowed to execute.

## Query Structure

A query can consist of the following elements:

- A main info area
- Conditions applied to the main info area's fields (e.g. **Country** = Austria and **Lead Status** = Customer)
- Several related info areas, each of which is linked to the main info area or other related tables
- Various options for linking info areas (e.g. show companies with / without persons)
- Conditions applied to the fields in these info areas

## Aurea Query Language (AQL)

The Aurea Query Language (AQL) allows you to define queries in the **AQL Syntax** field and is similar in syntax to SQL (which is commonly used to define database queries). AQL uses a specific syntax which is described in detail in the *Aurea CRM web Administrator Guide*, >> AQL (Aurea Query Language) in the *Aurea CRM web Administrator Guide*.

**Important:** A field with an AQL statement containing multiple conditions and using the same operator AND is interpreted as OR. Similarly, a multiple condition statement using only OR is interpreted as AND. This is the default behaviour of AQL in the context of a single field and applies only for a single field having multiple conditions defined with the same operator. The AND and OR operators behave as expected in all other cases.

For example, consider the following multiconditions on a fields and how they are interpreted:

1. F1 = 1 AND F1 = 2 AND F1 = 3 was interpreted before as F1 = 1 OR F1 =2 OR F1 = 3  F1 IN(1,2,3).
2. F1 != 1 OR F1 != 2 OR F1 != 3 was interpreted before as F1 !=1 AND F1 != 2 AND F1 != 3  F1 NOT IN (1,2,3).

The input field for AQL statements is located at the top of the query window:





The lower area allows you to define conditions using the Aurea CRM web GUI. When defining conditions using the UI, The corresponding AQL statement is displayed in the **AQL Syntax** area. This helps you familiarize yourself with AQL.

## Defining a New Query

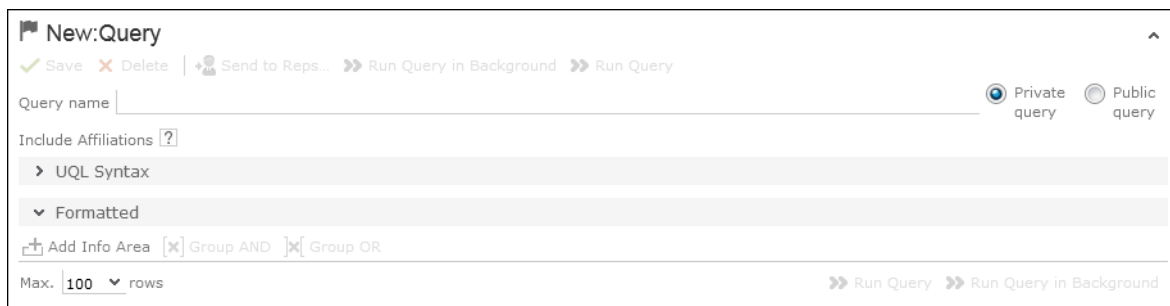
You can define queries in two ways:

- Using AQL (Aurea Query Language), entered in the **AQL Syntax** field. For more information on the AQL syntax, refer to the *Aurea CRM web Administrator Guide*.
- Using Aurea CRM web's GUI, which allows you to select the desired filter criteria. This is the method described in this manual.

To define a new query:

1. Select  (**Queries & Analyses**) > **Queries**.
2. Click on  (**New**).

The input mask is displayed.




3. Enter a name for the query in the **Query name** field. Define the query as either a **Private query** or a **Public query**. Private queries can only be accessed by the rep that created the query.

---

**Note:** You can however provide other users with private queries, >> [Sending a Query Definition to another Rep](#) on page 122.

---

4. Enable the **Include Affiliations** option (if configured) to return records added for affiliates in the results. For more information, >> [Affiliation View](#) in your product-specific manual that can be downloaded from <http://support.aurea.com>.
5. Click on  (**Add Info Area**) to open the **Select Info Area** dialog box.

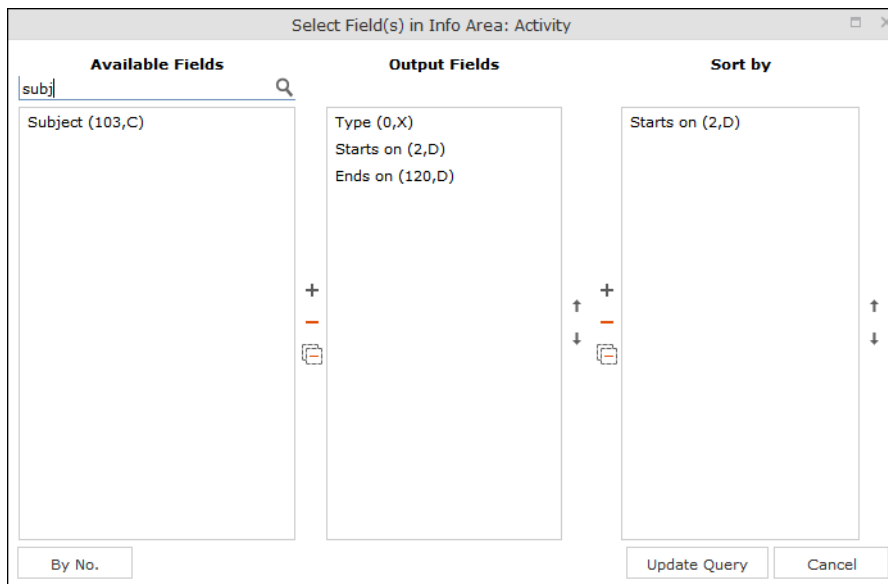
---

**Note:** All info areas that you can access are listed.

---


6. Select an info area. The **Select Fields** dialog box is opened.





7. Select the fields from this info area that you want to display.

- **Available Fields:** This box lists all fields in this info you can access. Your administrator is responsible for defining access to fields. You can also enter a portion of the desired name in the **Field name** field. The field number and type is displayed in parentheses following the field name, >> [Field Data Types](#) on page 47.
- Use the **By No.** and **Alph.** button to sort the field names alphabetically or by field number. Select the desired fields by clicking on them and click on the **+** button to transfer the field to the list of **Output Fields**.
- **Output Fields:** This area lists the fields that are displayed in the list of results. Each field is displayed in a separate column.

Select the desired fields in the list of output fields and click on the **-** button to remove the fields from the list of output fields. The  button removes all of the fields from the **Output Fields** list. Use the **↓** and **↑** buttons, to change the order of the fields.

- **Sort Fields:** Select a field in the list of **Output Fields** and click on **+** to add the field to the **Sort Fields** list. These fields are used to automatically sort the results. Double-click on a field to change the sort order (ascending or descending)

Click **-** to remove the selected field. Click  to remove all the sort fields from the list. Use the **↓** and **↑** buttons, to change the sort order of the fields.

---

**Note:** You can select multiple fields by pressing the Ctrl key, >> [Selecting Multiple Records](#) on page 83.

---

8. Click the **Add to Query** button to add your selection to the query.

9. Define the conditions in the query, >> [Conditions](#) on page 108.
10. Save the query.

## Editing Queries

If you edit an existing query (e.g. add info areas, fields or conditions), an asterisk (\*) is displayed following the name of the query in the header. The asterisk continues to be displayed until you save the changes.

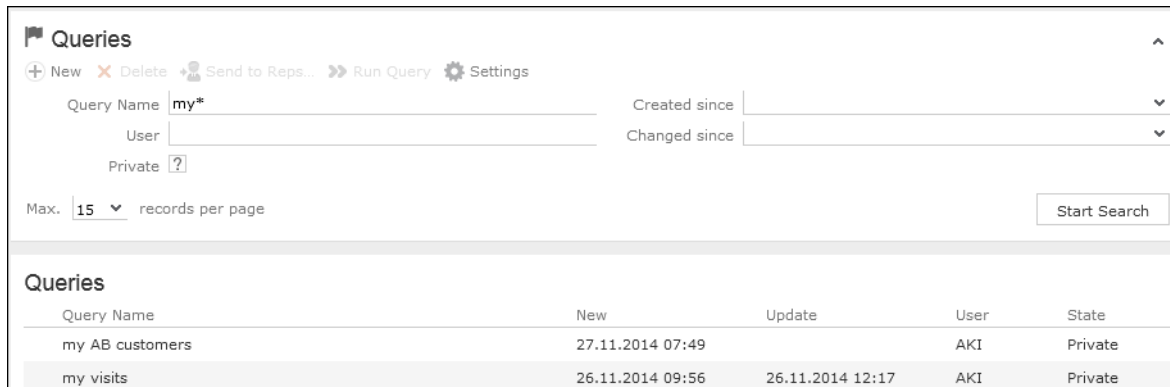
If you save an edited query under the same name, the query is overwritten immediately. If you change the name of the query and another query with the same name exists, you will be asked whether you wish to overwrite the existing query.

## Loading Queries

To load an existing query:

1. Select  (**Queries & Analyses**) > **Queries**.

The **Queries** page opens. The **State** column indicates whether the query is private or public.



The screenshot shows the 'Queries' page with the following elements:

- Header: Queries (with a flag icon and an upward arrow)
- Actions: + New, X Delete, + Send to Reps..., >> Run Query, Settings (gear icon)
- Filters:
  - Query Name: my\*
  - User: [empty]
  - Private: [?]
  - Created since: [empty]
  - Changed since: [empty]
- Max. 15 records per page (dropdown menu)
- Start Search button
- Table of Queries:
 

Query Name	New	Update	User	State
my AB customers	27.11.2014 07:49		AKI	Private
my visits	26.11.2014 09:56	26.11.2014 12:17	AKI	Private

Select **Run** from the context menu to run a query directly from the list.


2. Enter search criteria to restrict the queries displayed.
3. Use the context menu or double-click on a query to open it.

The query is loaded.



4. Edit the query by adding or removing info areas and conditions.
5. Define the maximum number of rows displayed by the query.
6. Click **Run Query** to run the query.

The results are listed at the bottom of the page. The number of results displayed per page depends on your settings, >> [Handling Tab](#) on page 55. The default value is 50 hits per page. If more results are returned than are displayed per page, use the navigation arrows to switch between pages.

7. Click on **Save as Query Snapshot** to save the results list. Define the maximum number of rows to be saved and whether the result should be saved as public or private.
8. Click  (**Export (MS Excel)**) to export your query to an Excel file, >> [Exporting](#) on page 87.

## Executing Queries

You can execute queries in two ways: immediately or in the background. When executing a query immediately, you need to wait until the query has executed before you can continue working. You should therefore only execute a query if you are sure that you have defined a query that returns the desired results or is quick to execute.

---

**Note:** As queries can be complex, executing them can impact on the system's performance. Your administrator can therefore defined that queries are always executed in the background at a specific time (e.g. at night), >> [Background Queries](#) on page 176.

---

To execute a query:

1. Load the desired query, >> [Loading Queries](#) on page 102.
2. You can execute the query in two ways:
  - Click **»» (Run Query)**. The query is executed immediately and you can only continue working once it has finished executing.
  - Click on **»» (Run Query in Background)**. You can continue working with the application and the query is scheduled for execution in the background. You will receive a message when the query has executed, >>[Background Queries](#) on page 176.

If the query is executed immediately, the results are listed at the bottom of the page. The number of results displayed per page depends on your settings, >> [Handling Tab](#) on page 178 [Handling Tab](#) on page 55. The default value is 50 hits per page. If more results are returned than are displayed per page, use the navigation arrows ( « « 16 - 30 of 45+ » » ) to switch between pages.

---

**Note:** Your administrator can also determine that the results of the query are not displayed on the screen but are directly exported to a Microsoft Excel file or report.

---

## Deleting Queries

You can delete queries in two ways:

- Select **Delete** from the context menu in the results list
- Click on **✗ (Delete)** in tab view when viewing the query.

To prevent the deleted query from being displayed, you need to reopen the view or invalidate your cache.

## Adding Info Areas to Conditions

You can define queries that are applied to multiple related info areas.

---

**Note:** You can add a maximum of 65 info areas to a query.

---

Aurea CRM has a range of predefined links between info areas:

- A company can be linked to any number of persons
- Each activity is linked to a person or company
- Each company and person can be linked with any number of activities

Once you have defined the parent info area, you can add further child info areas to a condition.

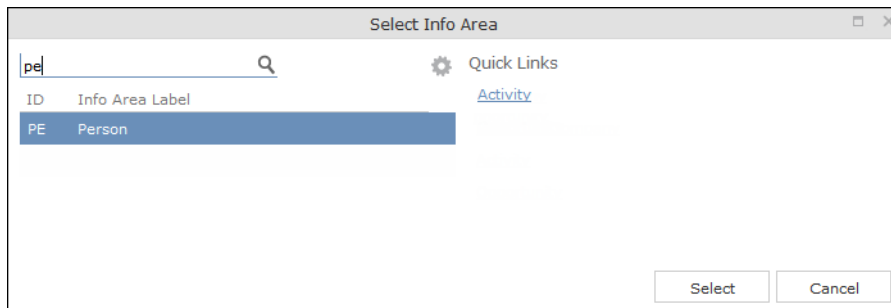
To add a child info area:

1. Load a query, >> [Loading Queries](#) on page 102.
2. Select **Add Info Area** from the context menu of the parent info area.

A window is displayed listing all info areas linked to the parent info area.

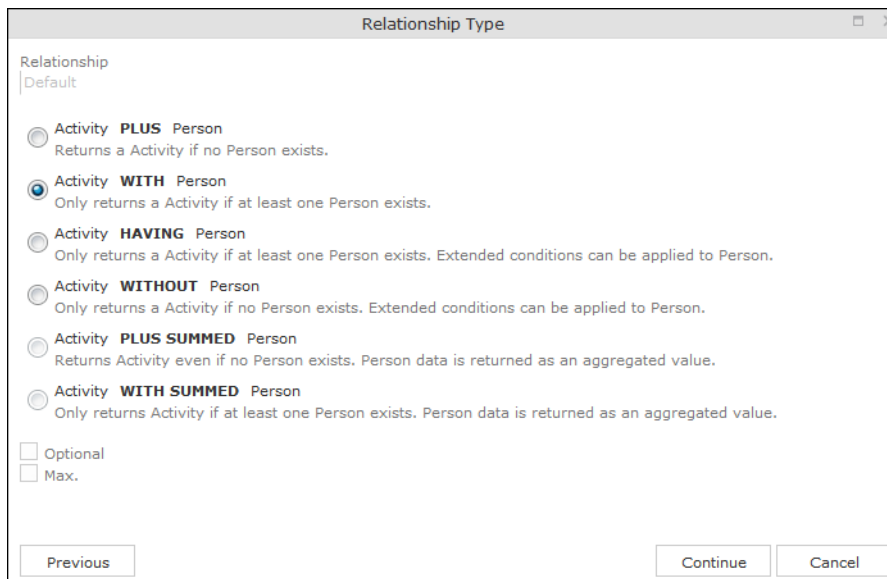
The **Quick Links** contains a list of the most frequently used info areas. Click on an info area in this list to add it without needing to search.

**Note:** Only those info areas you have access to are listed. Your administrator is responsible for defining which info areas you can access.



3. Select the info area from the list.

The **Relationship Type** dialog box opens.



4. Select the desired relationship type. The following relation types are available for activities and persons:
- **Activity PLUS Person** returns the activity, even if no person is linked to the activity
  - **Activity WITH Person** returns the activity, if at least one person is linked to the activity
  - **Activity HAVING Person** returns the activity if at least one person is linked to the activity. You can define extended conditions. This option needs to be configured by your administrator.
  - **Activity WITHOUT Person** returns the activity, only if no person is linked to the activity
  - **Activity PLUS SUMMED Person** returns the activity, even if no summed person(s) is/are linked to the activity
  - **Activity WITH SUMMED Person** returns the activity, if at least one summed person is linked to the activity

Similar options are available in other info areas, although some info areas may provide fewer options.

The SUMMED option returns the sum total rather than individual records. In the case of activities and persons, the number of person records added for the activity is returned.

---

**Note:** Sort fields are only available for the relation types PLUS and WITH. Sort fields cannot be defined for WITHOUT, PLUS SUMMED or WITH SUMMED. Furthermore, no fields are available for WITHOUT.

Only numeric fields can return summed values when using the SUMMED options. Other fields cannot be totaled and therefore cannot be selected from the **Available Fields** list. If you select the relation type WITH but do not select any fields, the child info area is only used to check the criteria. For example, if you select all companies with persons but do not select any fields, a list of all companies to which persons are assigned will be shown, but not the information about the persons.

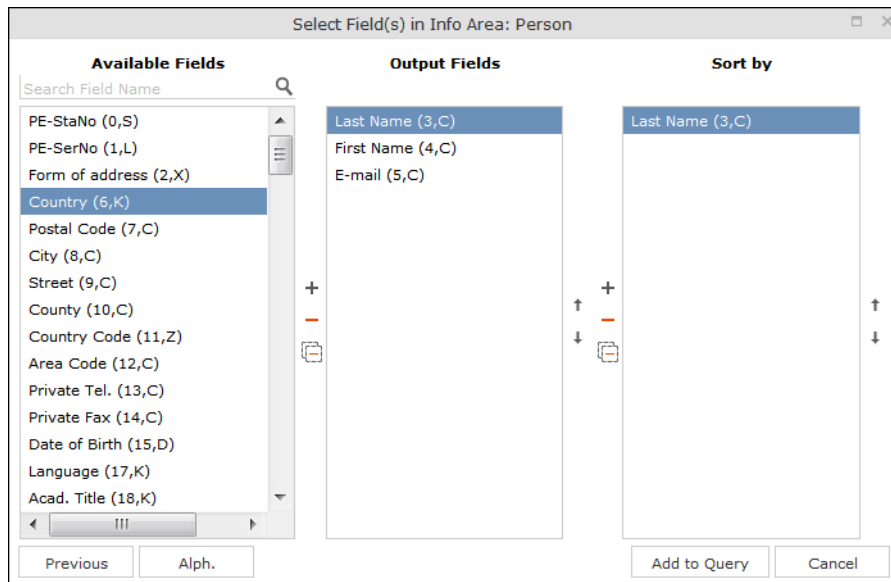
---

5. Enable the **Optional** check box to determine that the related info area is optional when using several child info areas. In this case, only conditions for info areas not marked as **Optional** need to be met, as well as for at least one **Optional** info area.

This check box is available for the relation types **WITH, WITHOUT, HAVING** and **WITH SUMMED**.

6. You can restrict the number of records that are output. Enter the number of lines available to the child info area in the results list in the **Max. X Records of [A] per [B]**. This function is not available for the SUMMED options.
7. Click **Continue**.

The **Select Fields** dialog box opens.



8. Define the output and sort fields, >> [Selecting the Fields in the List](#) on page 72.
9. Click **Add to Query**.  
You are returned to the query overview.
10. Define your conditions, >> [Conditions](#) on page 108.
11. From here, you can export the query (>> [Exporting](#) on page 87) or execute it using the **Run** button, >> [Executing Queries](#) on page 103.



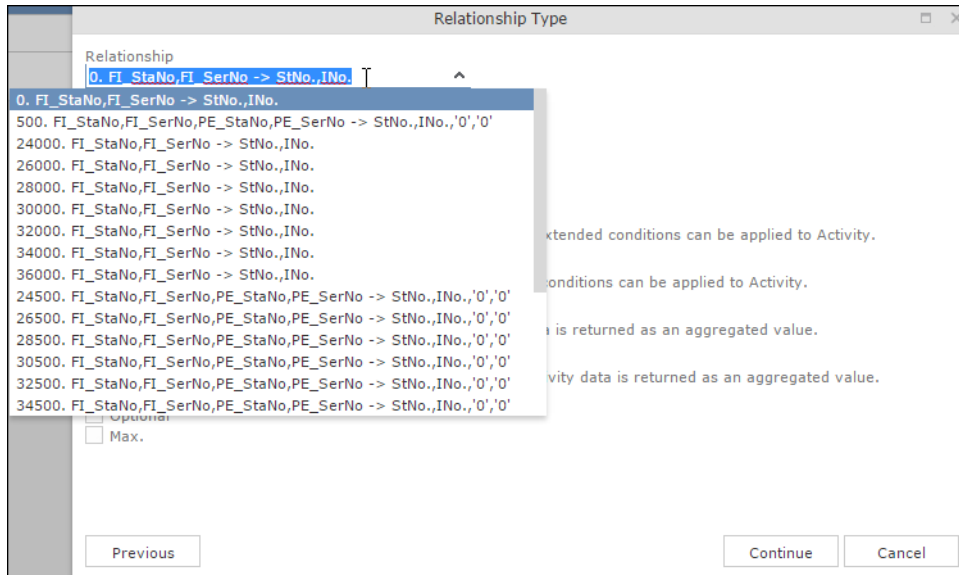
## Selecting Links between Info Areas

Several relationships can exist between two info areas. For example, there are multiple links between the **Ticket** and **Person** info areas: a person can be linked to a ticket as a person, contact person, end customer or billing recipient.

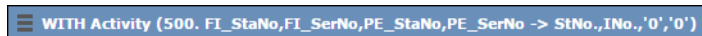
If you wish to add a further info area to a query, and more than one relationship exists between the two info areas, your administrator is responsible for determining which descriptions are displayed for the individual links.

**Example:**

A query is defined for the **Master Data** info area. The **Activity** info area is added to the query. Several links are available for selection between the **Master Data** and **Activity** info areas.



The link type is displayed in the query as follows:



## Conditions

You can define conditions for the fields in a selected info area. For example, "Country = Australia, City = Sidney OR Perth", or "Date > 1 January 2013 and Date < 7 November 2013".

Alternatively, you add determine that the comparison need be specified by the user when executing the query. This allows you to define queries where users only need to specify the comparison values, >> [Parameters and Predefined Queries](#) on page 121.

---


**Note:** Conditions can be applied to fields that you cannot access based on your access rights. These conditions are still taken into account by the query, however the contents of the field cannot be displayed in the results list.

---

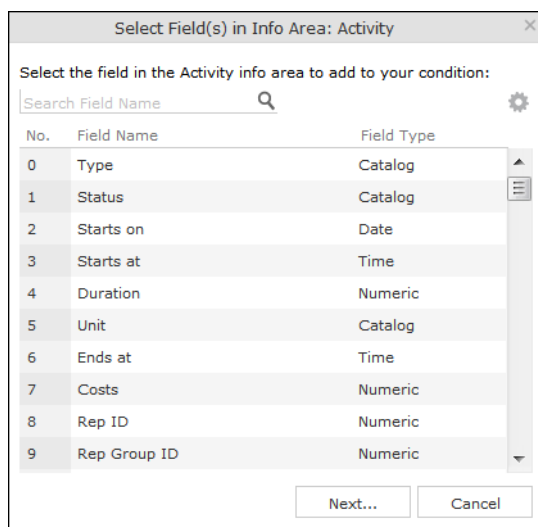


## Defining Conditions

To add a new condition to a query:

1. Load a query, >> [Loading Queries](#) on page 102.
2. Click on  to the left of **Conditions** and select **Add Condition** from the menu.

The following window opens:



The fields that you can access based on your Aurea CRM access rights are displayed. Your administrator is responsible for defining your access rights.

3. Click on a column heading to sort the list.
4. Select a field and click on **Next**.

You can also enter part of the name of the field in the **Field name** field:

- Enter one or two letters to list all the fields that begin with those letters.
- Enter more than two letters to list all fields that contain the sub-string in their name.

5. Define your condition. Depending on the **Field Type**, you can define the following conditions:
  - Text field; >> [Conditions for Numeric, Alphanumeric and Time Fields](#) on page 113.
  - Date field; >> [Conditions for Date Fields](#) on page 113 and [Variable Conditions](#) on page 115.
  - Catalog field; >> [Conditions for Catalogs](#) on page 110 and [Conditions for Child Catalogs](#) on page 111.
  - Numeric field; >> [Conditions for Numeric, Alphanumeric and Time Fields](#) on page 113

- Logical (Boolean) field; >> [Conditions for Boolean Fields](#) on page 112.
- Time field; >> [Conditions for Numeric, Alphanumeric and Time Fields](#) on page 113.
- Rep field; >> [Conditions for Rep Fields](#) on page 114 and [Variable Conditions](#) on page 115.

6. Click on **OK**.

This condition displayed in the overview.

## Conditions for Catalogs

To define a condition for a catalog:

1. Select a catalog field.

A dialog box is opened, allowing you to define the condition for the field.

The available catalog values are listed to the left. **Use as Parameter** is at the top of the list. You can use this value if the comparison value should be entered whenever the query is run, >> [Parameters and Predefined Queries](#) on page 121.

2. Choose the appropriate operator, e.g. = (**equal**) to determine that the condition should return records where the value of the catalog field matches the comparison value.
3. Select **Fixed** to compare the contents of the field with a fixed value from the list of entries. Select **Field** to compare the contents of a field, >> [Comparing Field Contents](#) on page 116. The **Text** option is also available for variable catalogs, >> [Conditions for Variable Catalogs](#) on page 111.

4. Double-click on an entry under **Available fields** to use it as a comparison value. The entry is moved to the right under **Selected Fields**.
5. Double-click on an item in the right area to remove it.
6. Click on **OK** to return to the query.

## Conditions for Variable Catalogs

When applying conditions to variable conditions, you can also use wildcards in comparison values. This allows you to apply conditions to substrings. To do so:

1. Select a variable catalog field.

The dialog used to define the condition is displayed.

2. Click on **Text**.
3. An input field is displayed. Enter the comparison value here. You can use the \* (any number of characters) and ? (single character) wildcards.

---

**Note:** You can use literal character values of '\*' and '?' using the escape sequences '\\*' and '\?'.  


---

All catalog values that match your comparison value are returned by the query.

## Conditions for Child Catalogs

When defining a condition applied to a child catalog (e.g. the **Interest** field in the **Interest** info area), you need to specify the parent catalog value (e.g. **Interest Group**) before you can define the condition for the child catalog.

The following example uses the **Interest** field in the **Interest** info area:

Conditions applied to child catalogs are otherwise defined the same as for all other catalogs, >> [Conditions for Catalogs](#) on page 110.

## Conditions for Boolean Fields

To define a condition for a Boolean field:

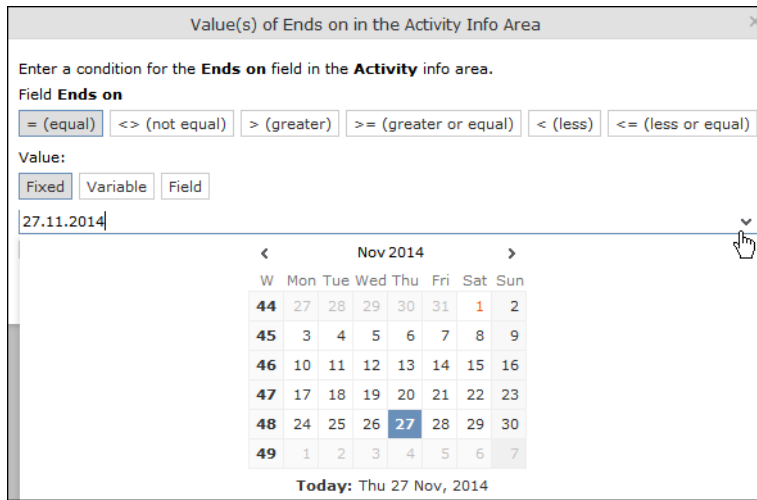
1. Select a Boolean field.

2. Specify the type of comparison (**equal**, **not equal**).
3. Select **Fixed** to compare the contents of the field with a fixed value from the list of entries. Select **Field** to compare the contents of a field, >> [Comparing Field Contents](#) on page 116.
4. Select either **Yes**, (true) **No** (false) or **Use as parameter** as the comparison value, >> [Parameters and Predefined Queries](#) on page 121.
5. Click on **OK** to return to the query overview.

## Conditions for Date Fields

To define a condition applied to a date field:

1. Select a date field.

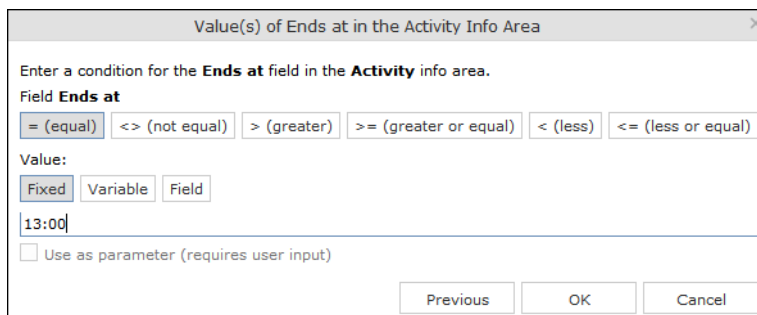


2. Select the type of comparison (**equal**, **not equal** etc.).
3. Date fields allow you to use fixed and variable comparison values. Use the **Fixed** option to compare the value with a specific date or to a value entered by the user (if the **Use as Parameter** option is enabled). Use the **Variable** option to enter a date relative to the date the query is executed on. Select **Field** to compare the value with the contents of another field, >> [Variable Conditions](#) on page 115, [Comparing Field Contents](#) on page 116 and [Parameters and Predefined Queries](#) on page 121.
4. Click on **OK** to return to the query overview.

## Conditions for Numeric, Alphanumeric and Time Fields

To define a condition applied to a numeric, text or time field:

1. Select either a numeric, text or time field.



2. Define the type of comparison (**equal**, **greater** etc.).
3. Determine what to compare the contents of the field with. Choose between **Fixed**, **Variable**, **Field** (compare with the contents of another field), >> [Variable Conditions](#) on page 115 and [Comparing Field Contents](#) on page 116. If you select **Fixed**,

you can enable **Use as parameter (requires user input)** to allow users to enter the comparison value when executing the query, >> [Parameters and Predefined Queries](#) on page 121.

4. Enter the comparison value in the **Value** field.
5. Enable the **Use as Parameter** option if you want the comparison value to be entered by the user upon starting the query, >> [Parameters and Predefined Queries](#) on page 121.

Wildcards (\*, ?) may also be used for text fields.

---

**Note:** You can use literal character values of '\*' and '?' using the escape sequences '\\*' and '\?'.

---

6. Click on **OK** to return to the query overview.

## Conditions for Rep Fields

To apply a condition to a rep field:

1. Select a rep field.

2. Specify the type of comparison (**equal**, **not equal**).
3. You can define both **Fixed** and **Variable** conditions for reps. Use the **Field** option to compare the rep to an entry in another rep field, >> [Comparing Field Contents](#) on page 116. Enable the **Use as Parameter** option if you want a comparison value to be entered by the user upon starting the query, >> [Parameters and Predefined Queries](#) on page 121.

If you have selected **Fixed**, you need to select the rep used in the condition.

---

**Note:** You can select several reps as comparison values. The reps are linked with a logical OR.

---

Select the rep(s), >> [Selecting Reps](#) on page 89.

The selected reps are listed in the rep field. Reps are separated using a semicolon.

Elke Führer; Gudrun Peischer; Miranda Meyer

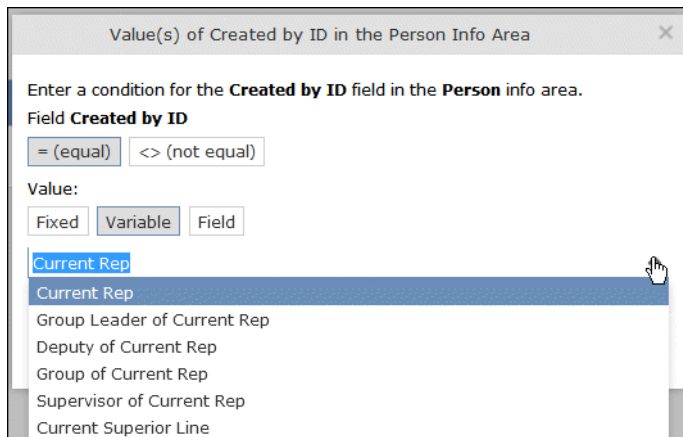
## Variable Conditions

If the same query is used by various reps or is carried out regularly, you can define variable conditions that are applied to rep and date fields (e.g. the current rep or current date).

### Variable Reps

To define a variable condition applied to rep field:

1. Select a rep field and enable the **Variable** option.



2. Select an option from the drop-down list.

The appropriate user is used by the query as a comparison value when it is executed.

### Variable Date Fields

Variable dates are dates relative to the date on which the query is executed, e.g. 40 days from today.

To define a variable condition for a date field:

1. Select a date field and enable the **Variable** option.
2. Select the reference date from the drop-down list.
3. Determine time period added (**Plus**) or subtracted (**Minus**) from the reference date.

## Variable Time Fields

The time at which the query is executed can be used to define the comparison value for time fields.

To define a variable condition for a time field:

1. Select a time field and choose the desired comparison type.
2. Select the desired time format from the drop-down list.

## Comparing Field Contents

When defining conditions, you can choose to compare the value stored in fields in a record.

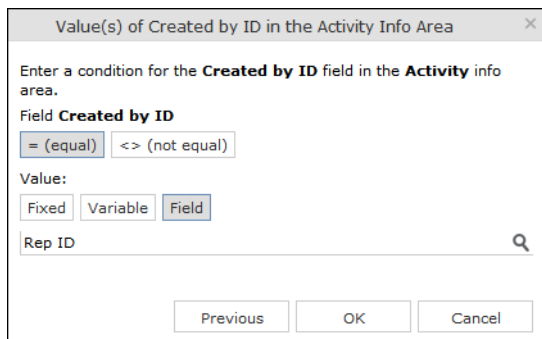
You can compare the following fields:

- Fields of the same type, e.g. two numeric fields
- Catalog fields that access the same catalog

To define a condition that compares the contents of two fields:

1. Define a condition.
2. Select the **Field** option.

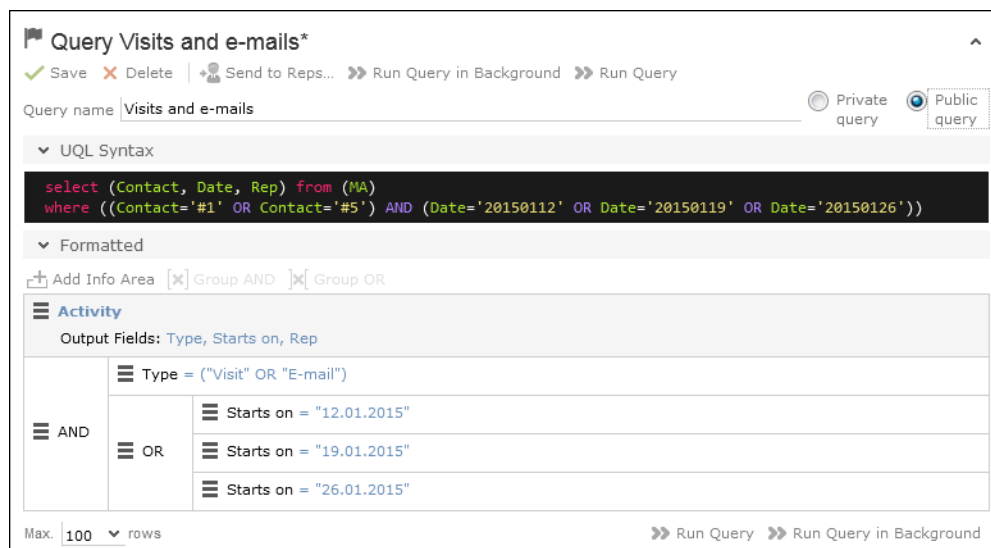




3. Click on **Q (Select)**. All fields of the same type in the info area are listed.
4. Select the desired field for the comparison.

## Conditions in the Overview

Once you have defined the conditions for an info area, they are displayed in the query overview.



Click on **≡** to edit the info area and conditions using the appropriate context menu entries, or click on the linked field name.

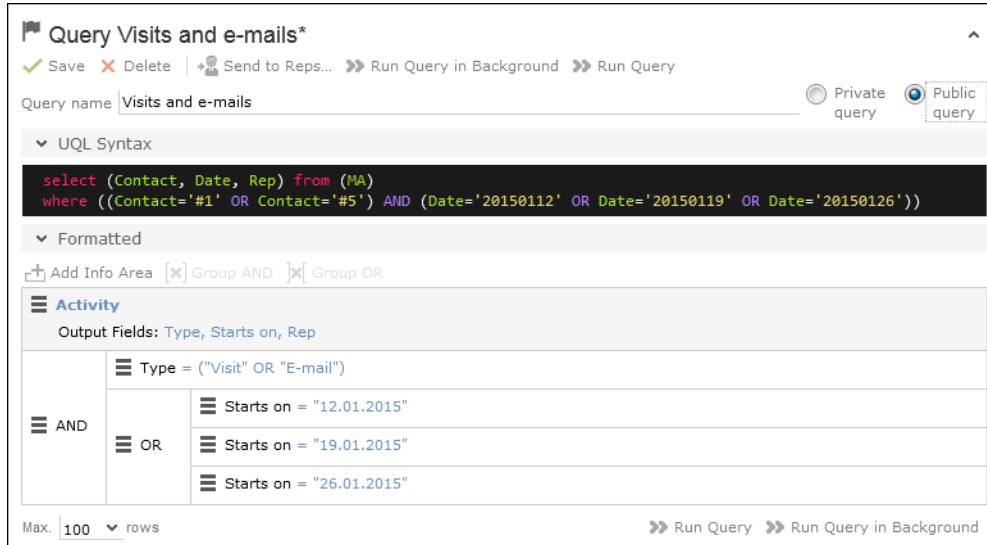
## Linking Conditions

You can change the operator (AND or OR) used to link conditions. Two options are available:

- Select **Change to AND** or **Change to OR** from the context menu next to the operator.
- Select the condition whose link operator you want to change and click on **⌘ (Group AND)** or **⌘ (Group OR)**. Only the currently inactive option is available for selection.

Grouping criteria corresponds to placing them within brackets in a logical expression: For example, if you have defined the condition "A OR B OR C", and link the B and C sub-criteria with a logical AND, this results in the expression "A OR (B OR C).

You can also define conditions hierarchically and thus link multiple conditions. In the following example, the individual tiers of the hierarchy are indented:



Each condition is evaluated separately and then combined when the other linked conditions using the appropriate operator (AND/OR).

### Examples of Linked Conditions

The following examples use queries applied to the **Activity** info area.

#### Comparing the contents of one or more fields with a value

Field1 = Value1 AND/OR Field2 = Value2 AND/OR Field3 = Value3 etc.

Example: To display your own and Mona Market's completed visits, define the following condition:

Type = "Visit" AND Status = "Completed" AND (Rep = "Current Rep" OR Rep = "Mona Market").

---

**Note:** The conditions in parentheses (Rep = "Current Rep" OR "Rep = "Mona Market") need to be linked with each other using a logical OR. This ensures that activities are returned where either the current rep or Mona Market are entered in the Rep field.

---

Add Info Area [X] Group AND [X] Group OR	
<b>Activity</b>	
Output Fields: Rep, Status, Type	
	Type = "Visit"
AND	Status = "Completed"
	OR
	Rep = "Miranda Meyer"
	Rep = "Current Rep" (Chris Aki)
Max. 100 rows	

### Comparing the value in a catalog field to one or more values

CatField1 = Value1a OR Value1b OR Value1c

Example: You want to list all scheduled activities of the types "Visit", "Letter" and "E-mail". Define the following condition:

Type = "Visit" OR "Letter" OR "E-mail"

AND Status = 'Scheduled'

Add Info Area [X] Group AND [X] Group OR	
<b>Activity</b>	
Output Fields: Rep, Status, Type	
AND	Type = ("Visit" OR "Letter" OR "E-mail")
	Status = "Scheduled"
Max. 100 rows	

### Comparing the contents of a field (not a catalog field) to more than one value

Field1 = Value1 AND Field2 < Value2 AND Field2 > Value2a AND Field3 = Value3 etc.

Example: You want to list all visits in the week from the 10th to 14th of November 2014. Define the following condition:

Type = "Visit" AND Starts on >= "10.11.2014" AND Starts on <= "14.11.2014"

Add Info Area [X] Group AND [X] Group OR	
<b>Activity</b>	
Output Fields: Rep, Status, Type	
	Type = "Visit"
AND	Starts on >= "19.01.2015"
	Starts on <= "23.01.2015"
Max. 100 rows	

## Advanced Conditions

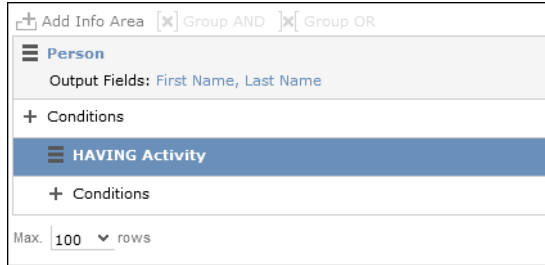
Advanced conditions are only available for info areas that are linked with either the "HAVING" or "WITHOUT" relationships. You can use advanced conditions to use sum totals to restrict your query results. For example, you can list all companies with more than 10 employees exist using advanced conditions.

## Defining Advanced Conditions

To define an advanced condition:

1. Link two info areas in a query using either HAVING or WITHOUT, >> [Defining a New Query](#) on page 100 and [Adding Info Areas to Conditions](#) on page 104.

In this example, the **Person** info area is linked to the **Activity** info area using a HAVING relationship.

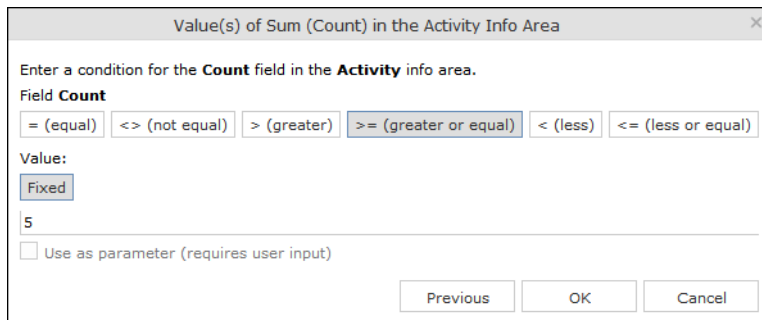


2. Select **Add Advanced Condition** from the context menu.

The **Select Field(s) in Info Area: [Info Area]** dialog is displayed. Only those fields that are available in advanced conditions are displayed.

3. Select a field and click on **Next**.

The **Value(s) of Sum [Field] in the [Info Area] Info Area** dialog is displayed.



The condition defined in the screenshot above determines that only persons for whom five or more activities are stored in the database are returned by the query.

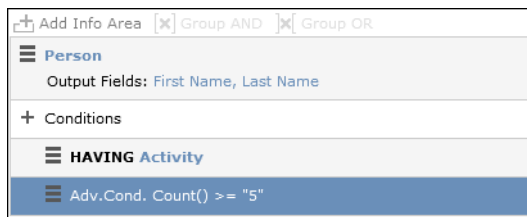
---

**Note:** In this example, the **Number of records** field was selected. The field's name in the **Value(s) of Sum [Field] in the [Info Area] Info Area** dialog is **Count**.

---

4. Click on **OK**.

The query overview is displayed.



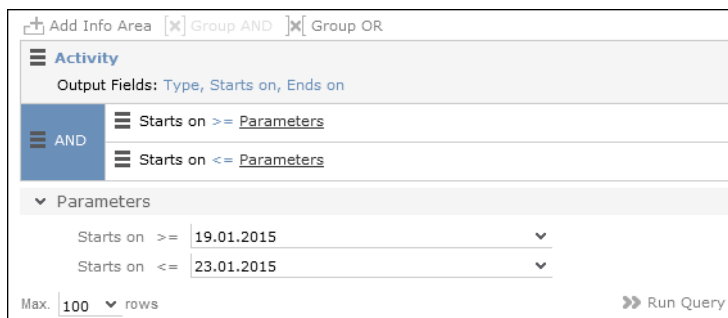
## Parameters and Predefined Queries

Most users will not need to define complex queries. The use of a pre-defined query where the comparison values can be specified should generally suffice. These queries are defined using parameters. When the query is executed, you then only need to enter comparison values for the parameters.

To allow users to enter parameters when executing a query, select **Use as parameter (requires user input)** as the comparison value when defining the query, >> [Defining Conditions](#) on page 109.

To define the values to be used by parameters in a query:

1. Open a query, >> [Loading Queries](#) on page 102.



2. The conditions defined using parameters are listed under **Parameters**. Enter the desired comparison values for the parameters, or select the value from the drop-down list. One field is available for each condition defined using a parameter.
3. Click on **Run Query** to execute the query using the values you have specified.



### Tips:

- If a catalog is defined as a parameter, only one catalog value can be selected. If you want to be able to select several catalog values, you need to define separate parameters. Any parameters not required must be deleted before executing the query.
- If a child catalog is defined as a parameter, your administrator needs to ensure that the parent catalog is either predefined or available for selection too. Otherwise you cannot define a parent catalog for the query.

## Sending a Query Definition to another Rep

If you have defined private queries, you can make these queries available to other reps. The query is copied to the rep's configuration in the process.

To make a query available to another rep:

1. Load a query (>> [Loading Queries](#) on page 102) or select a query in the list of queries.
2. Click  (**Send to Reps**).  
A dialog box is displayed.
3. Click on  (**Select Rep**) to select the desired reps or groups in the **Recipient(s)** field, >> [Rep Fields](#) on page 44.

---

**Note:** If you select a group, the query is sent to all members of the group.



---

4. The selected query's name is displayed in the **Query name** field. You can rename the query.
5. Enable **Notify Rep(s)** to determine that the recipients should receive a message informing that they have received the query.
6. Enable the **Overwrite existing query definition** option to overwrite any queries with the same name owned by the recipients.
7. Click **Send Query**.

A private query is generated for the recipient with the name you specified.

## Saving, Loading and Exporting Query Results

Depending on your configuration, you can save query results and load them at a later date.

- Click on  (**Save as Query Snapshot**) to save the results list as a query snapshot.
- Select **Queries & Analyses > Query Snapshots** from the menu to list the available snapshots.
- Click  (**Export (MS Excel)**) to export the results of the query.

## 1-N links handled on data access layer

CRM does not perform linking on the database server for 1-N links and instead it treats each table in the query as a separate query then link the results in the data access layer of the CRM.Core. The workaround in this case is to modify the query statement as explained below:

UQL:

```
select (Company, Country, CountryCode, WR.BeginDate) from (FI)
plus (WR)
orderby (WR.BeginDate)
```

SQL

---

**Note:** In case of SQL, two separate queries are used and their results are combined together in the CRM.Core:

---

```
SELECT TOP 101 Firma, Land, FTZ, Ftz1, Ftz2, ID FROM CRM_FI WHERE LosKZ=0
```

```
SELECT TOP 101 Vertragsbeginn, ID, ID_FI, ID_PE FROM CRM_WR WHERE ID_FI=8589934592001
AND LosKZ=0 ORDER BY Vertragsbeginn
```

This method has some limitation and performance impact. One limitation is that the sorting process is not applied to the final result, which leads to unexpected outcome in some cases.

The workaround, in this case, is to modify the UQL query statement to be N-1. For example, in the above UQL, do the following changes:

```
select (Company, Country, CountryCode, WR.BeginDate) from (WR)
plus (FI)
orderby (WR.BeginDate)
```

## Quick Query (Enterprise CRM)

Quick Query is an enterprise querying tool that provides easy access to Aurea CRM data and information without requiring a deep technical knowledge of the querying tools. Quick Queries is designed to improve your productivity whether you are a sales, marketing, management, or a service personnel.

Quick Queries are designed to:

- Simplify query composition
- Help you easily complete all relevant steps required to create effective queries, by providing guided process flows.
- Provide the convenience of easy access to key information, required to perform day to day activities, and render decisions.

A few of the many possible user tasks that could benefit from the use of Quick Queries are described below:

- As a marketing specialist responsible for planning and conducting campaigns, you could query for select target groups, for a complete campaign execution.
- As a sales personnel, you could query for potential candidates satisfying several different criteria, to make a sales call.
- As a manager, you want to create queries and analysis to supervise the performance of your sales representatives.

## Understanding Quick Queries

Aurea CRM allows customers with enterprise versions to allow their users to create Quick Queries. Users can then share their queries with others or save them as private queries. Searching for a quick query is similar to searching for the standard queries as explained in the previous chapter Queries.

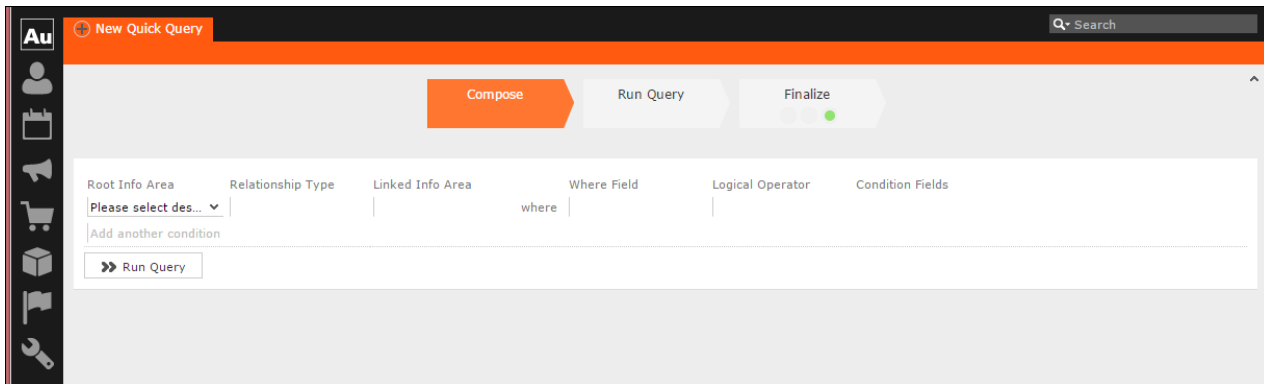
A Quick Query definition process generally consists of the following stages:

1. Composing a query
2. Enhancing the query
3. Query Execution
4. Finalizing the Query

Each of these stages can be accessed without any pre-conditions. You can move between the stages as you work on defining your query. For example, it is not necessary to enhance a query that you composed. You can execute the query, and finalize it. Later you can open the query, enhance it, and save it again. Quick Queries can also be enhanced with standard queries to improve their capabilities.

The following screenshot shows the New Quick Query window, displaying the **Compose** tab of a quick query definition.





**Note:** The **Compose** tab allows you to implement the Compose and Enhance stages of a quick query definition.

During the composition stage, a Quick Query starts with some preconditions and allows some functions as listed below:

- A quick query can be composed with the base info areas of Company (FI), Person (PE), and Contact Person (CP). Hence a Quick Query always returns a list of customers. It is mandatory to select one of the info areas.
- You are allowed the relationship type of “With” or “Without” when selecting a related or linked info area.
- Allows enhancement of the standard query with addition or subtraction of other queries (Quick Queries as well as standard queries).
- Allows you to execute the query immediately to test the query.

In the Enhance stage, you can enhance your composed query with additional statements already composed. The preconditions and allowed functions at this stage are listed below:

- All queries that refer to the root info areas Company (FI), Person (PE), and Contact Person (CP) are available for enhancement.
- Queries defined by you and public queries are made available.
- You can delete expendable conditions.
- You can execute the enhanced query to test the results.

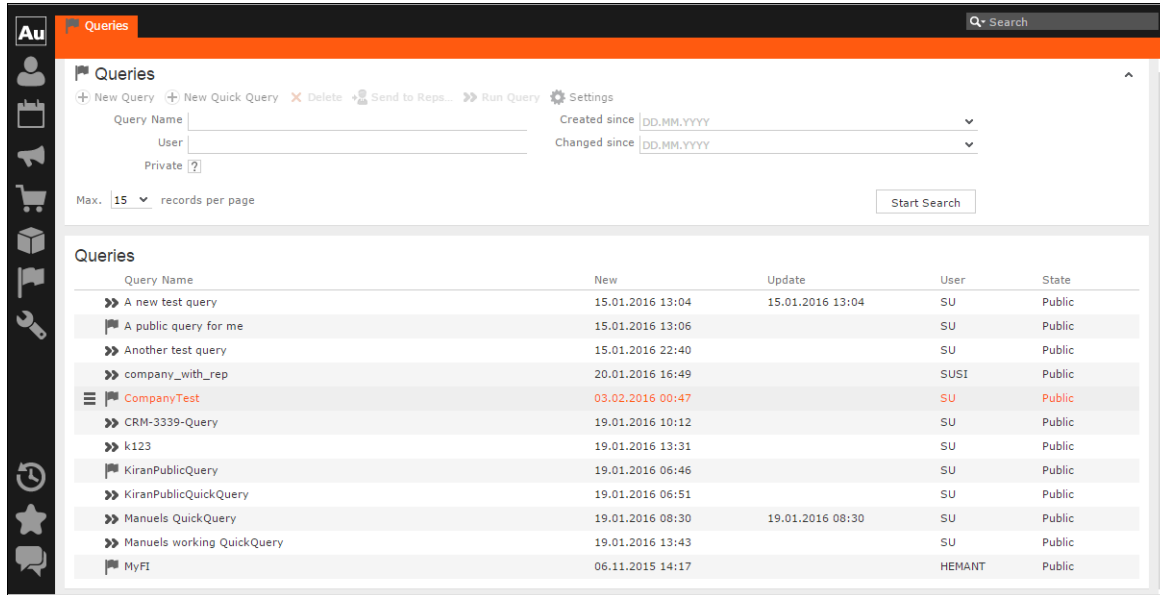
The query execution stage allows you to run the query composed and/or enhanced so far.

The Finalize stage allows you save the query and define the rights restrictions on the query. You can make it a public query in which case it will be available to other users. As a private query it will be available only to you.

## Creating a Quick Query

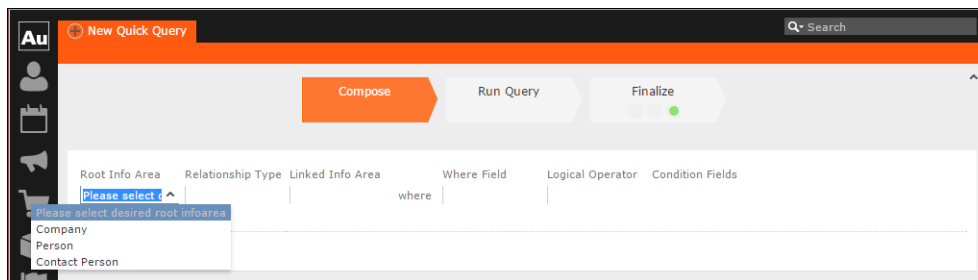
To create a quick query, perform the following steps:

1. From the **Queries and Analysis** menu select **Queries**. The Queries window displays.



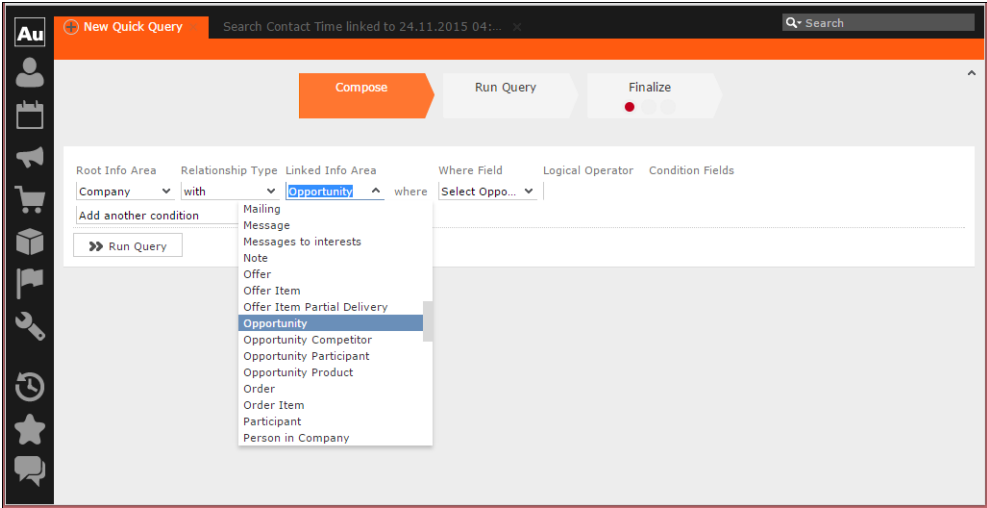
**Note:** The list of queries displayed contains both Quick Queries and standard queries. The Quick Queries in the Queries list are tagged with the » icon.

2. Click **New Quick Query** to open the window at the Compose tab.
3. Select the **Root Info Area** of the query you want to create from the drop down list. You have the following choices: Company; Person, Contact Person. The **Relationship Type** column is activated.



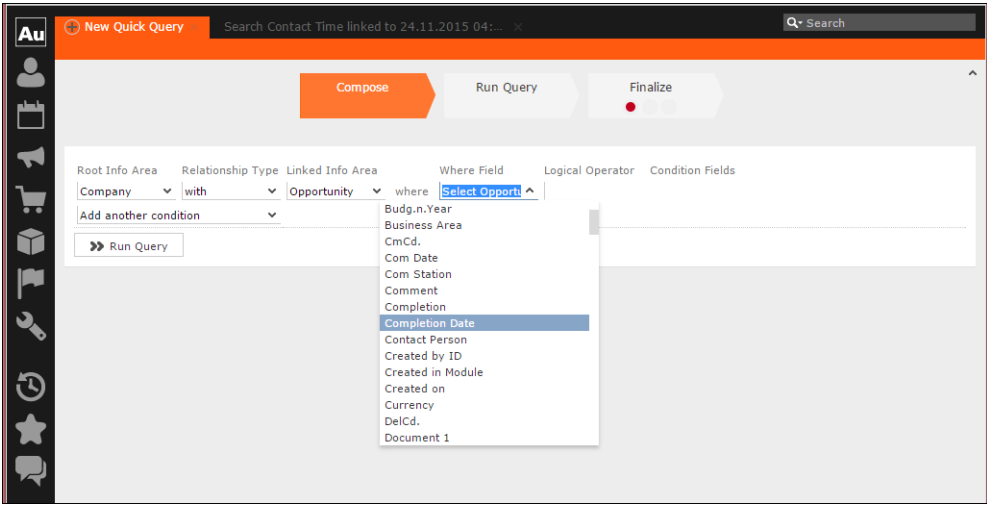
4. Select the **Relationship Type** from the drop down list for the linked info area.

The Where Field activates and is populated with applicable fields for the linked info area. In the screenshot example, the root info area is company, and the relationship type **With** for the **Linked Info Area** Opportunities.



**Note:** It is not necessary to add a Relationship Type to another info area. You can directly create conditions on the root info area. In such case, you can directly select a **Where Field** and ignore the **Relationship Field** and **Linked Info Area** fields.

- 5. After that select the Linked Info area from the drop down list. The following screenshot shows the **Company** info area, and the relationship type **With** for the **Linked Info Area** Opportunities. The **Where Field** drop down list is populated with fields from the linked info area.



**Note:** The Where Field column gets activated and shows the fields from the linked info area, in this case the Company fields.

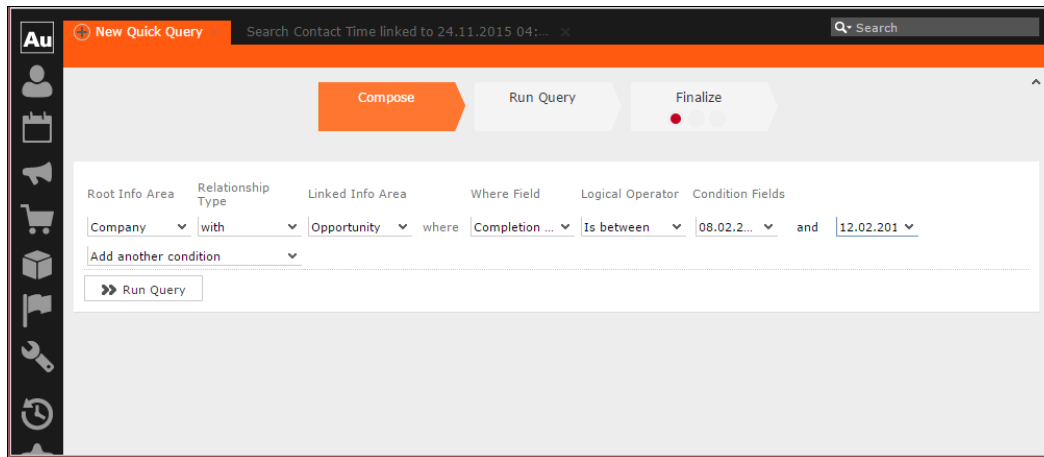
- 6. Scroll down and select the required info area field from the **Where Field** drop down list.

The Logical Operator field column activates. In this example screenshot, **Completion Date** is selected.

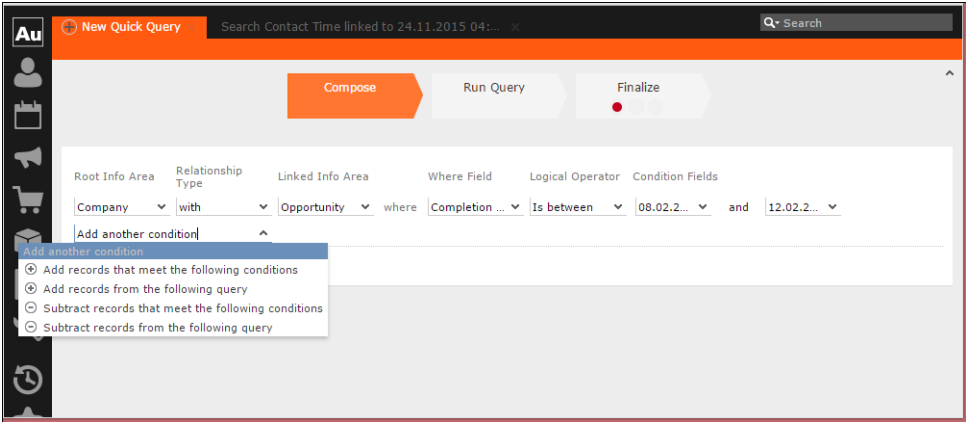
7. Select the applicable **Logical Operator** from the drop down list. You have the following options: Equals (=); Not equals; Is empty; Is not empty; Is true; Is not true; Is smaller than; Is greater than; Is between; Is current date.

**Note:** The options populated in the **Logical Operator** depends on the data type of the **Where Field**. For example, a Boolean field type will get the operators: Is true; Is not true.

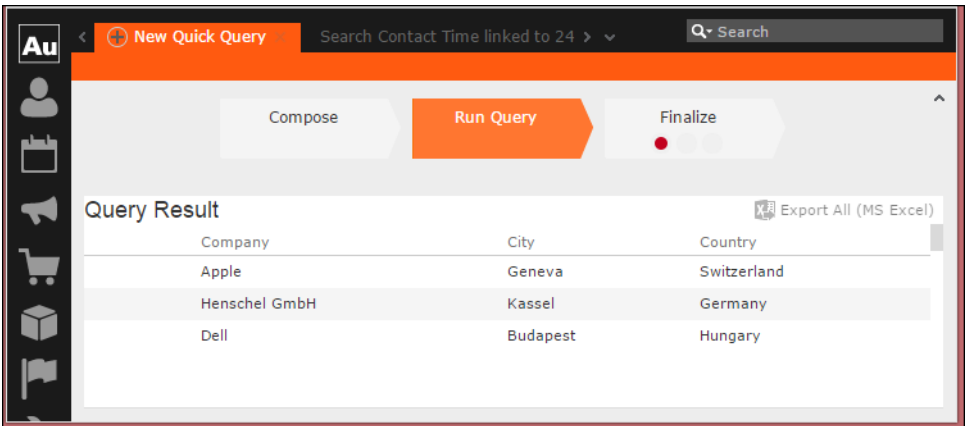
The Condition Fields column activates and the drop down list is populated with the available values. In this case it displays the available country names. In this example screenshot, the **Logical Operator** Is between is selected and in the **Condition Fields** the start and end dates between which the completion dates for opportunities are set is selected.



8. To Add Another Condition, select one of the following from the drop down list:
  - Add records that meet the following conditions
  - Add records from the following query
  - Subtract records that meet the following conditions
  - Subtract records from the following query



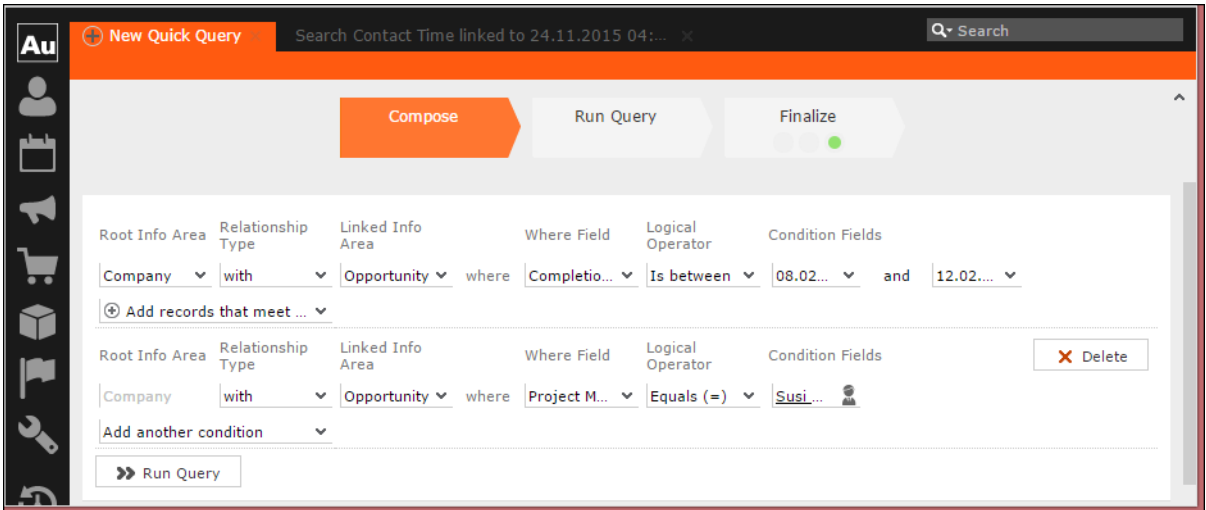
9. Click Run Query to test the results.



10. Depending on your choice, perform the following sub-steps.

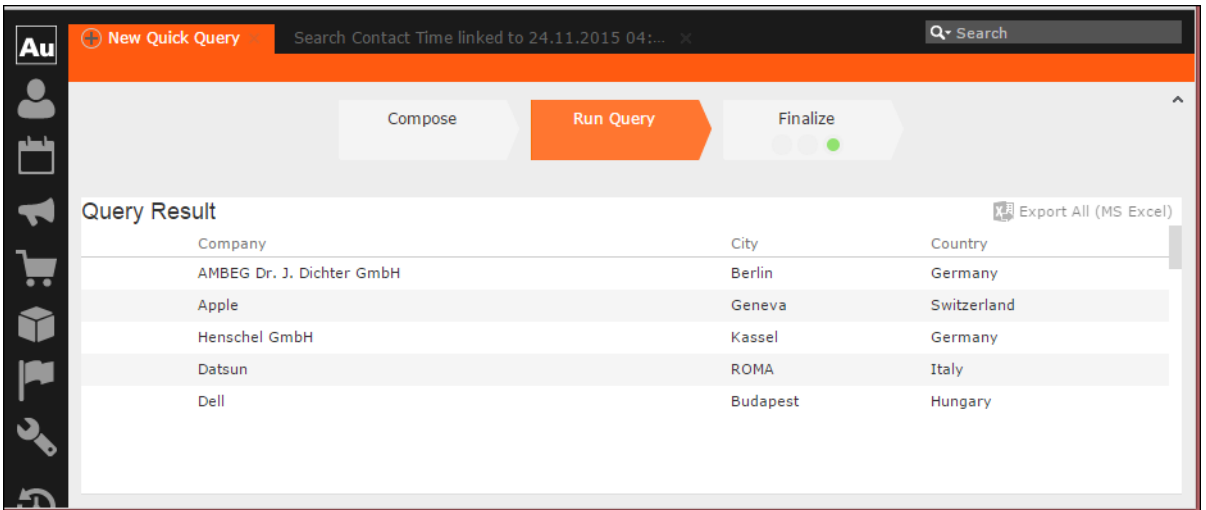
**Note:** At this point you move into the enhance stage of a query definition, adding or subtracting records from another query. You can add the standard queries or quick queries to enhance your base query you are composing. You can also continue with composition by adding or subtracting records with more conditions.

- a. For the options to **Add records that meet the following conditions** or **Subtract records that meet the following conditions**, repeat the instructions in steps 3 to 7 above. The example screenshot shows the **Add records that meet the following conditions**. Companies with Opportunities and Where the Project Manager is a specific person.



**Note:** The above screenshot shows the **Finalize** tab with a green dot. This demonstrates that you can move between different stages of a Quick Query independently. In this case, the Quick Query was finalized after adding the above records. Now we can move to the Enhance stage of a Quick Query definition, and use the remaining two options of adding or subtracting records from other queries.

b. Click Run Query to evaluate the results of your quick query.

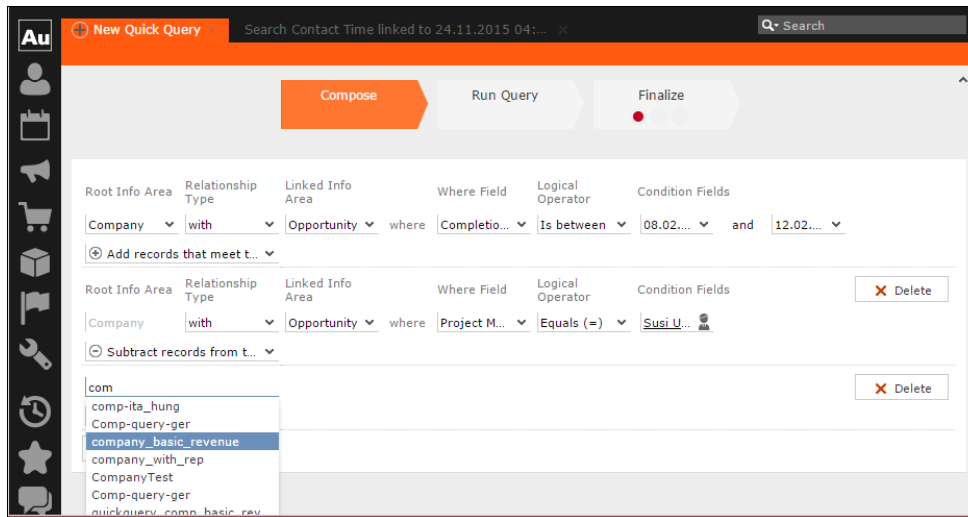


**Note:** In this run additional records are added to the run on the base query run in step 9 above.

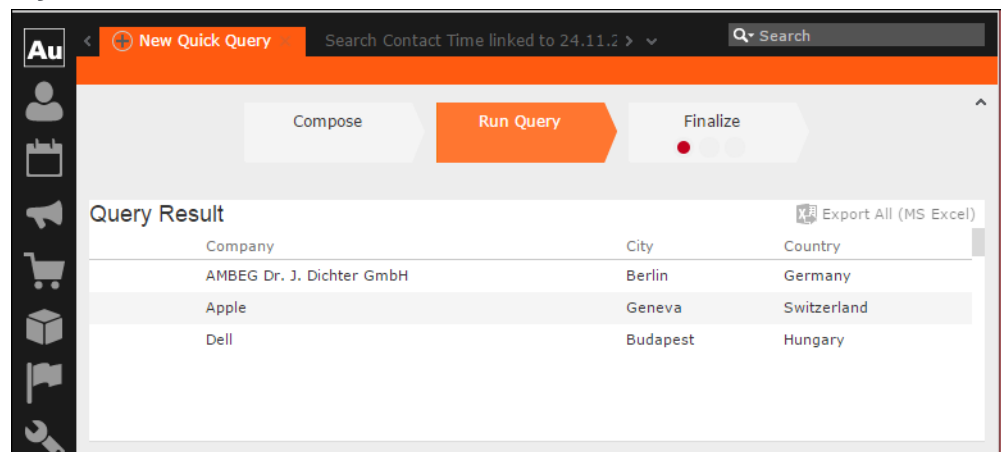
c. To **Add a record from the following query** or **Subtract a record from the following query** perform the following:

a. Select **Subtract records from the following query**.

A search box is displayed. Start typing the name of the query and list of possible matches are displayed as you type, as shown in the screenshot below. For this example, we select the query `company_basic_revenue`. This query removes the records for companies that have a revenue of less than 100,000 from the base Quick Query.



b. Click **Run Query** to view the results of the new



enhancement.

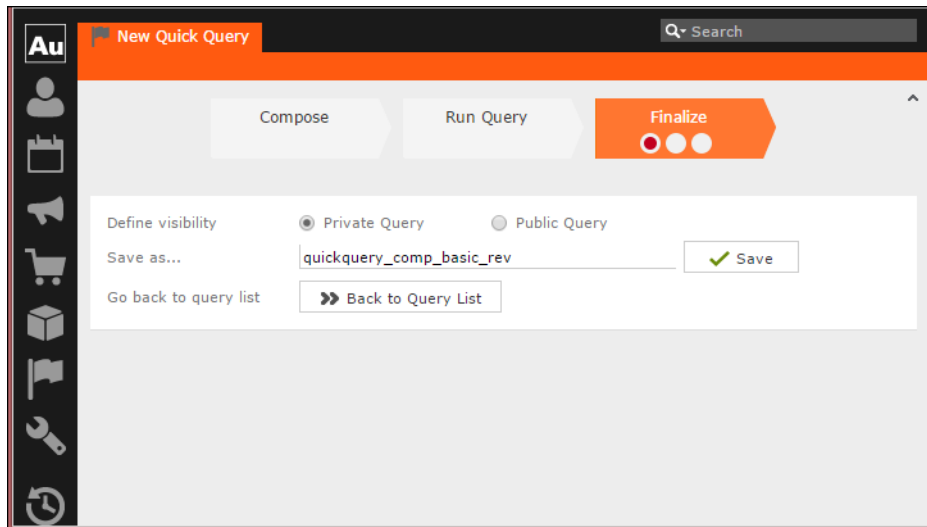
c. To **Add a record from the following query** type the name of the query in the search box.

11.To finalize a Quick Query, click the **Finalize** tab.

---

**Note:** You can finalize a quick query at any stage of the query definition.

---



- Check **Private Key** to save the Quick query for your personal use or check **Public Query** to share the Quick Query with others.
- Enter a name for the Quick Query in the **Save as...** text field.
- Click **Save** to finalize the Quick Query.

---

**Note:** Click Back to Query List to show a list of queries with the finalized quick query highlighted.

---

## Change Notifications Service (Enterprise CRM)

Aurea CRM change notification service notifies you about changes to records and events of interest to you. You can track the changes on your dashboard, as well as use other notification types like Email, Popup, and Record. You can add items of interest to your personal Watchlist.

To enable change notifications service on an infoarea, request your CRM system administrator to add the watchlist menu to the infoarea's context menu.

---

**Note:** Change Notification Service is an enterprise feature.

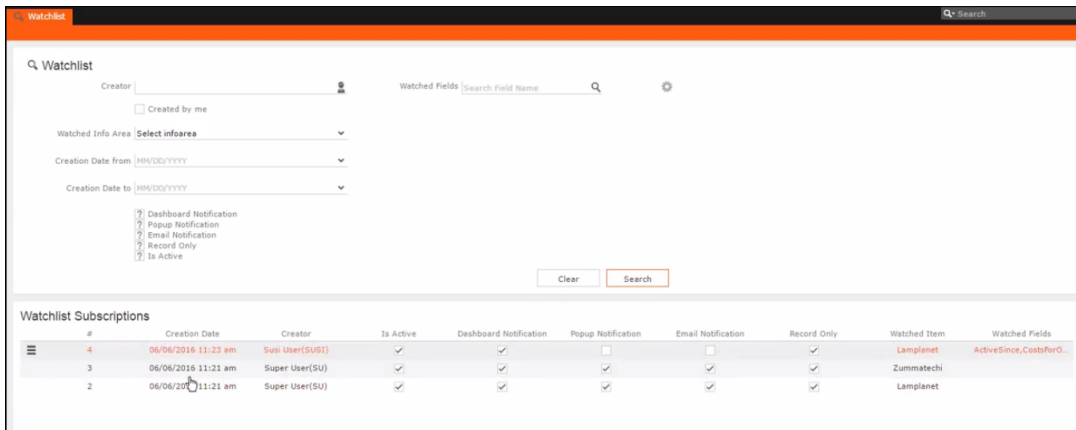
---

## Overview of Watchlists and Notifications

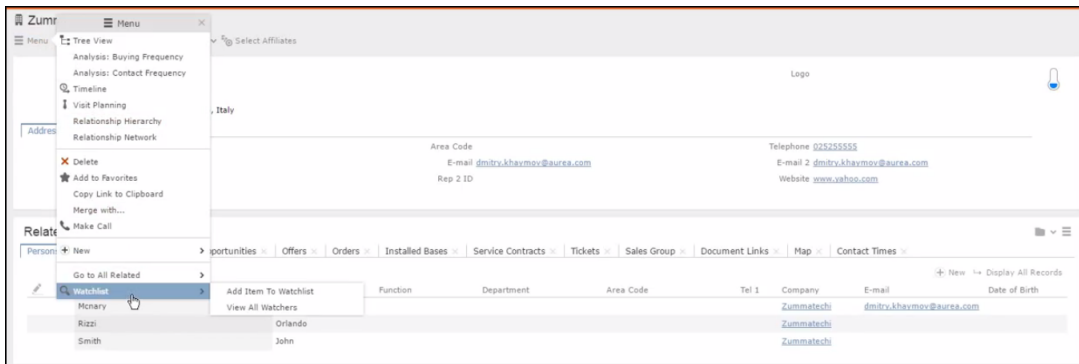
Aurea CRM users can set up their personal Watchlist of items to be notified about changes. For example, an accounts manager might be interested in knowing when a change occurs with his key accounts and he can add the accounts to his watchlist and set the notification types.

The following screenshot shows the list of watchlist items subscribed by all users:



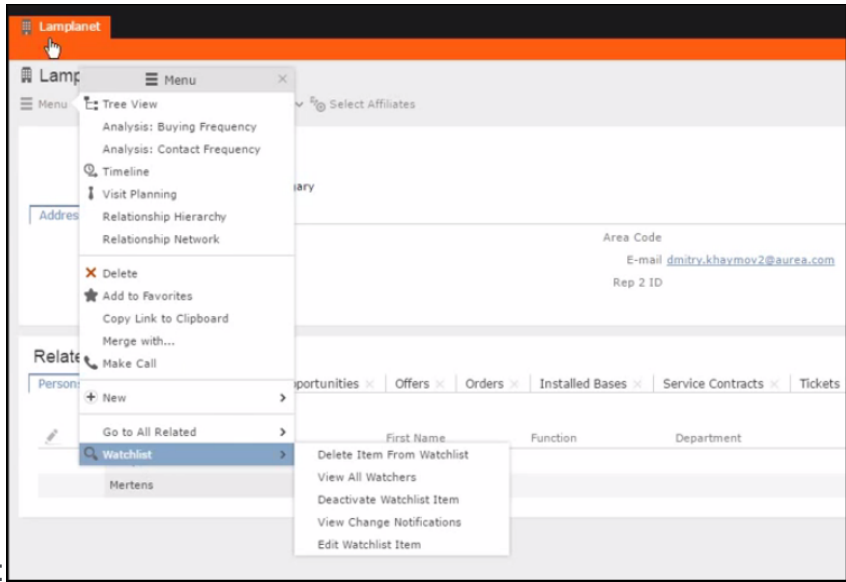


For a given record or infoarea the Watchlist context menu initially allows you to add a Watchlist item. For example, the screenshot below shows the **Add Item to Watchlist** and **View all Watchers** sub-menu items for the Company infoarea.



After adding an item to the Watchlist the Watchlist context menu allows you to perform the following tasks:

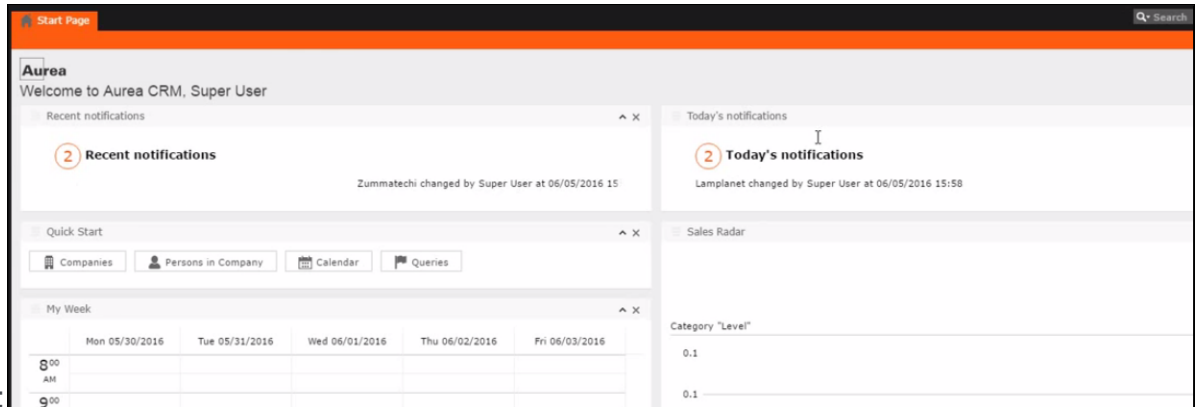
- Delete items from the watchlist.
- View all watchers.
- Deactivate watchlist items.
- View change notifications.
- Edit watchlist item.



See the screenshot below:

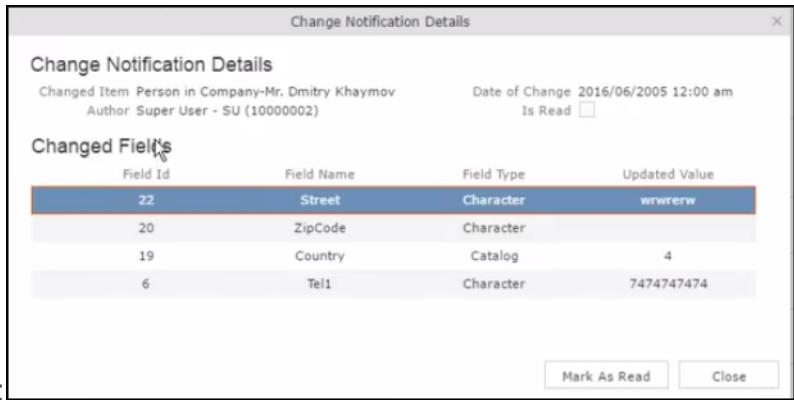
A notification is generated when one of the following condition is fulfilled:

- A notification request is set for any change to the record of interest and a change is made to the record.
- A notification request is set for changes made to specific fields of a record and one or more of the specified fields are changed.
- The following screenshot shows the change notifications visible on the



Dashboard:

- The following screenshot shows a popup change



notification:

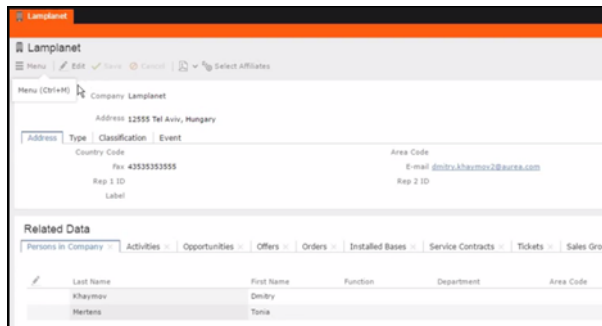
The remaining sections describe the various tasks required to create and work with Watchlist items.

## Adding items to the Watchlist

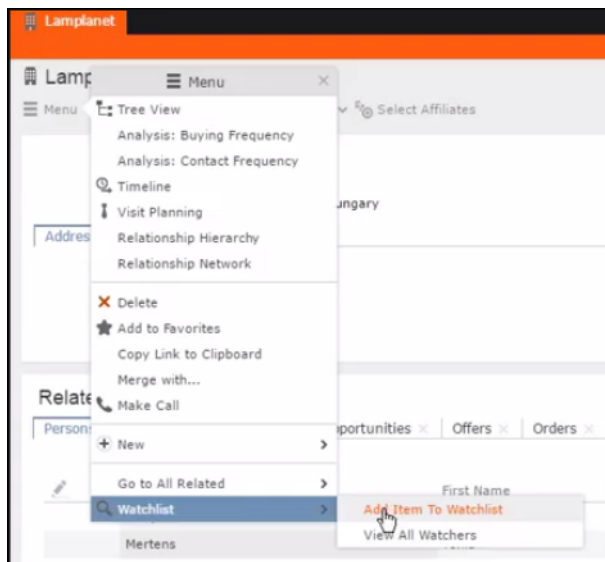
To add items to a watch list perform the following steps:

1. Open the infoarea and search for the record that you are interested in adding to the watchlist.

The record window displays. For example, the following screenshot shows the **Lamplanet** Company record infoarea.



2. From the context menu items, select **Menu > Watchlist > Add Items to Watchlist**.



The **Add Item to Watchlist** window displays.

Add Item To Watchlist

Please select notification option and add item to personal watch list to get notified if something changes with the record.

Notification Types

- Dashboard Notification
- Popup Notification
- Email Notification
- Record Only

Notify On

Save

---

**Note:** You have to select at least one **Notification Type** and also specify a **Notify On** event to successfully add a watchlist item.

---

- Specify the notification types and notification even as described below:
  - Click on the checkbox to select one or more **Notification Types** from the following list:
    - Dashboard Notification**—Change notifications will be displayed on the dashboard. Two widgets for recent changes and today’s changes are displayed. They also display the number of change notifications.
    - Popup Notification**—Change notification popups when you login, displaying the change details.
    - Email Notification**—Change notification will be sent by email.
    - Record Only**—Change notification is persisted in the database, but no popup, email, or dashboard notifications are displayed. You can view the change notifications from the watchlist context menu of the watched record.
- Specify the **Notify on** event from the following:
  - Every change**—you are notified when any of the record’s field is modified.
  - Change on Specific Fields**—you are notified when the fields of interest in a record are changed.

To specify the field of interest perform the following steps:

1. Select Change on Specific Fields from the Notify On dropdown

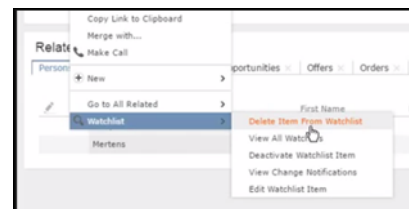
list.

2. Select the fields of interest that you want to be notified, on change. You can enter the field name in the search box to quickly find the fields of interest. You can select multiple fields.

5. Click **Save**.

6. The record is successfully added to the watchlist. Notice that now the Watchlist

menu provides you with further submenu items.

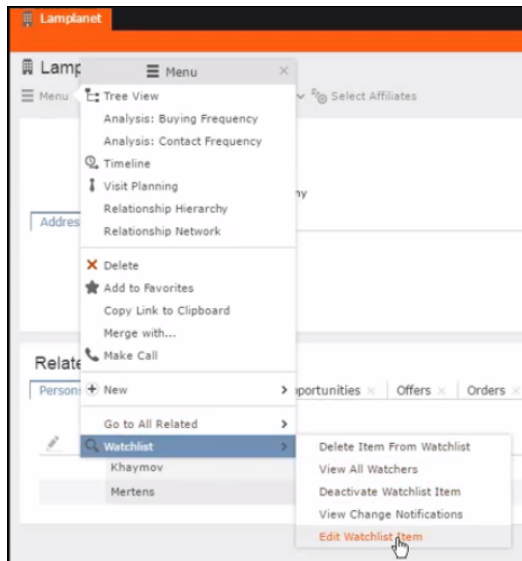


## Editing Watchlist Item

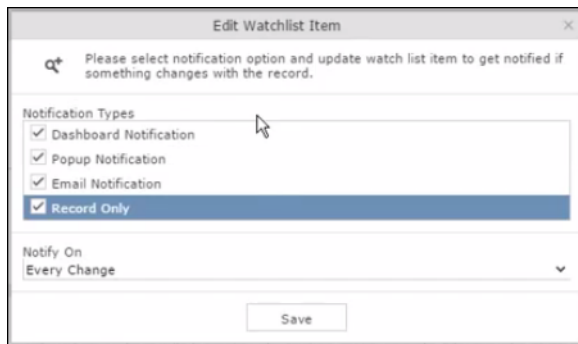
You can edit an existing watchlist item on a record and change the notification types and event details that generate the notifications.

To edit a watchlist item, perform the following steps:

1. Open the record to which you have added the watchlist item.
2. Select **Menu > Watchlist > Edit Watchlist Item**.



The **Edit Watchlist Item** window displays.



3. Select or unselect the **Notification Types**.

---

**Note:** Ensure that at least one **Notification Type** and **Notify On** even is specified.

---

4. Modify the **Notify On** event as described below:

- **Every change**—you are notified when any of the record’s field is modified.
- **Change on Specific Fields**—you are notified when the fields of interest in a record are changed.

To specify the field of interest perform the following steps:

1. Select Change on Specific Fields from the Notify On dropdown list.

The Select Fields extension window displays.

plays.

2. Select the fields of interest that you want to be notified, on change. You can enter the field name in the search box to quickly find the fields of interest. You can select multiple fields.

5. Click **Save**.

The changes are saved to the watchlist item.

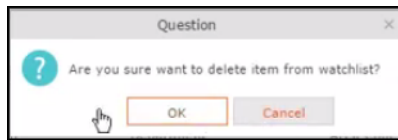
## Deleting an Item from the Watchlist

You can delete a watchlist item added to a record, if you no longer wish to watch the changes to the record.

To delete an item from a watchlist, perform the following steps:

1. Open the record to which you have added the watchlist item.
2. Select **Menu > Watchlist > Delete Item from Watchlist**.

A confirmation window displays.



3. Click OK.

The item is removed from the watch list.

## View all Watchers of a Watchlist item

To view all watchers subscribed to a watchlist item:

1. Open the record to which containing the watchlist item.
2. Select **Menu > Watchlist > View all Watchers**.

The **View Watchers** window displays the list of subscribers to the watchlist item.

#	Creator	Create Date	Is Active	Notify On	Dashboard...	Popup Noti...	Email Notif...	Record Only	Specific Fie..
1	Super User	06/16/201...	<input checked="" type="checkbox"/>	Every Cha...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
21	Susi User	06/18/201...	<input checked="" type="checkbox"/>	Every Cha...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

## Activate/Deactivate watchlist subscription item

To stop a watchlist item from generating change notifications, you can deactivate the watchlist item. Similarly, you can activate the watchlist item when you want to receive change notifications. You can activate or deactivate a watchlist item from two locations. You can search for watchlist item from the Watchlist subscriptions search page and deactivate or activate it from there. On the other hand if you know the record for which watchlist item was created, then you can deactivate it from the record's watchlist context menu.

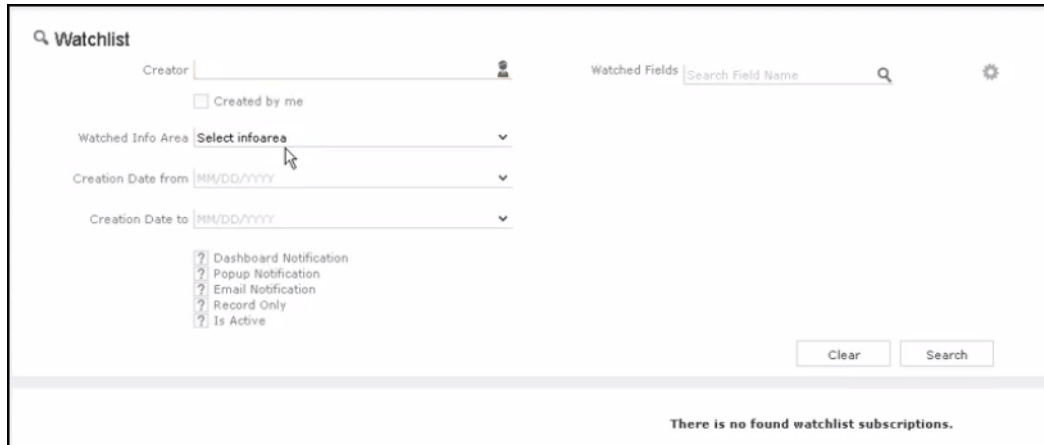
## Activate/Deactivate from watchlist subscription search page

To deactivate or activate watchlist item from the watchlist subscription search page, perform the following steps:

1. Select **Collaboration > Watchlist > Watchlist Subscriptions**.

The Watchlist Subscription Search page displays.





2. Populate the required search filters and click **Search**.

The search results displays.

Watchlist Subscriptions										
#	Creation Date	Creator	Is Active	Dashboard Notification	Popup Notification	Email Notification	Record Only	Watched Item	Watched Fields	
11	06/16/2016 02:35 pm	Super User(SU)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Zummatechi		
1	06/16/2016 02:17 pm	Super User(SU)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Lamplanet		

Note that the **Is Active** column shows if a watchlist item is active or not. A check mark indicates that the watchlist item is active. A blank check box shows that the watchlist item is deactivated.

3. To deactivate an active watchlist item:
  - a. Click the **Actions** context menu.

The **Actions** menu displays.

Watchlist Subscriptions						
#	Creation Date	Creator	Is Active	Dashboard Notification	Popup Notification	
11	06/16/2016 02:35 pm	Super User(SU)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<ul style="list-style-type: none"> <li>Actions</li> <li>Deactivate Watchlist Item</li> <li>Delete Watchlist Item</li> <li>Edit Watchlist Item</li> </ul>
1	06/16/2016 02:17 pm	Super User(SU)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

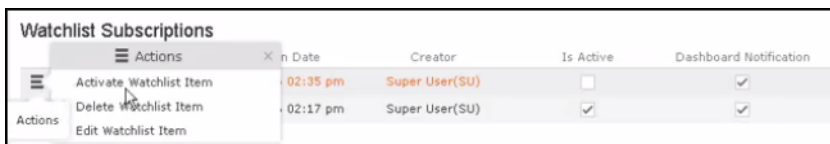
- b. Select **Deactivate Watchlist Item**.

The watchlist item is marked as inactive.

Watchlist Subscriptions				
#	Creation Date	Creator	Is Active	Dashboard Notification
11	06/16/2016 02:35 pm	Super User(SU)	<input type="checkbox"/>	<input checked="" type="checkbox"/>
1	06/16/2016 02:17 pm	Super User(SU)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

4. To activate a watchlist item:
  - a. Click the **Actions** context menu.

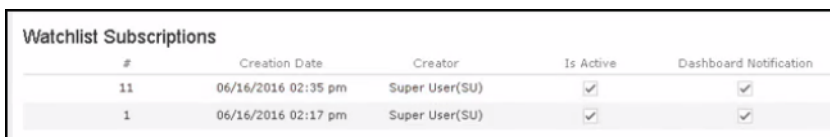
The **Actions** menu displays.



Watchlist Subscriptions		Creation Date	Creator	Is Active	Dashboard Notification
Actions	Activate Watchlist Item	02:35 pm	Super User(SU)	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	Delete Watchlist Item	02:17 pm	Super User(SU)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Edit Watchlist Item				

- b. Select Activate Watchlist item.

The watchlist item is marked as active.



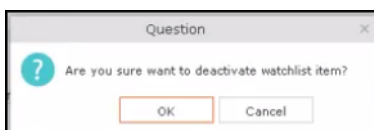
#	Creation Date	Creator	Is Active	Dashboard Notification
11	06/16/2016 02:35 pm	Super User(SU)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1	06/16/2016 02:17 pm	Super User(SU)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

## Activate/Deactivate from record's context menu

To deactivate or activate watchlist item from the watchlist context menu of a record:

1. Search corresponding infoarea and open the required record.
2. To deactivate the watchlist item:
  - a. Select **Menu > Watchlist > Deactivate Watchlist** item.

A confirmation window displays.

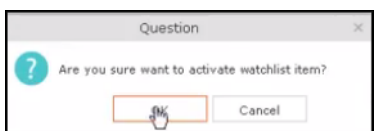


- b. Click **OK**.

The watchlist item is deactivated.

3. To activate the watchlist item:
  - a. Select **Menu > Watchlist > Deactivate Watchlist** item.

A confirmation window displays.



- b. Click **OK**.

The watchlist item is activated.

## Search watchlist subscriptions

To search the watchlist subscriptions, perform the following steps:

1. Select **Collaboration > Watchlist > Watchlist Subscriptions**.

The Watchlist Subscription Search page displays.

No.	Field Name	Field Type
21	City	Text
99	Home Office City	Text

2. Select the search filters from the following list:

- **Creator**—Filter watchlist subscriptions created by the specified subscriber. Only one person can be selected. If select the  **Created by me** filter, the search will be restricted to watchlist items created by you.
- **Watched Info Area**—Filter watchlist subscriptions on records from the selected infoarea. The **Selected Fields** filter will be activated and populated with selected fields to be watched when the watch list was created.
- **Selected Fields**—Specify the selected fields to be watched when the watch list was created.

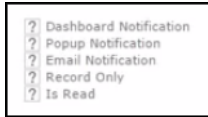
---

**Note:** The fields populated in this filter depends on the infoarea selected in the **Watched Info Area** filter. In the example, in the screenshot in step 1, the **Watched Info Area** is **person in company**, and the corresponding fields for the infoarea is displayed.

---

- **Date of Change from**—Select the start date from which you want to view the subscriptions created.
- **Date of Change to**—Select the end date before which you want to view the subscriptions created.

3. Select the notification type and read status filters of the watchlist subscriptions.



**Note:** If multiple filters are selected, then search would select a notification type if it satisfies any one of the criteria.

These filters can toggle between the following three states, indicated by the changing icon. You can click on a filter to toggle between the states. The states and their effect on the filter is described below:

- —In this state, the filter is ignored and not included in the search.
- (Blank checkbox)—In this state, the filter is added as false. This means the notification is selected if the filter item value is false. For example, for the **Is Read** filter, this would mean that a notification is selected if it is marked as not read.
- (selected checkbox)—In this state, the filter is added as true. This means the notification is selected if the filter item value is true. For example, for the **Is Read** filter, this would mean that a notification is selected if it is marked as read.

To select an item perform the following:

- a. To activate a filter item, click .

The icon changes to a checkbox().

- b. To set the value of the filter as **true**, click the checkbox (). Leave the checkbox empty () to set the filter as false. For example, for the Dashboard Notification filter, setting it to true () would mean a notification is included in the watchlist item, if the dashboard notification type was configured in the watchlist item generating the notification.

4. Click Search.

The search result is displayed in the bottom pane.

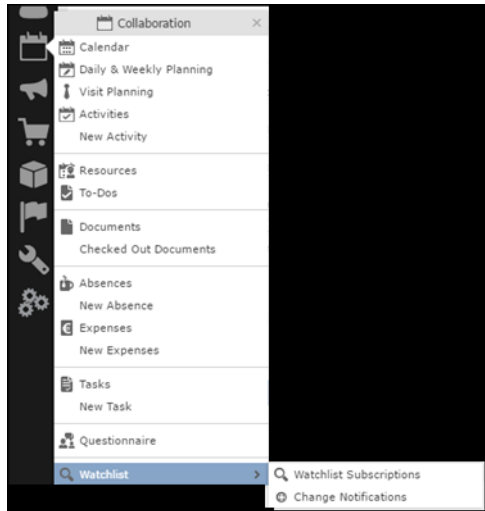
Watchlist Subscriptions									
#	Creation Date	Creator	Is Active	Dashboard Notification	Popup Notification	Email Notification	Record Only	Watched Item	Watched Fields
11	06/16/2016 02:35 pm	Super User(SU)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Zummatechi	
1	06/16/2016 02:17 pm	Super User(SU)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Lamplanet	

## Searching Notifications

You can search the set of all notifications issued on all the subscribed records in the CRM database.

To search the history of all change notifications, perform the following steps:

1. Select the Collaboration > Watchlist > Change Notifications. Open the record to which you have added the watchlist item.
2. Select **Menu > Watchlist > Change Notifications**.



The Change Notification page displays.

 A screenshot of the 'Change Notifications' page. The page has an orange header with a search bar. Below the header, there are several filter fields: 'Author' (with a user icon), 'Changed Fields' (with a search bar and a gear icon), 'Changed Infoarea' (a dropdown menu), 'Date of Change from' (a date picker), and 'Date of Change to' (a date picker). Below these filters is a list of notification types: Dashboard Notification, Popup Notification, Email Notification, Record Only, and Is Read. There are 'Clear' and 'Search' buttons. Below the filters is a table titled 'Change Notifications' with the following columns: #, Date of Change, Author, Is Read, Dashboard No..., Popup Notifica..., Email Notificat..., Record Only, Changed Item, and Changed Fields. The table contains six rows of data.
 

#	Date of Change	Author	Is Read	Dashboard No...	Popup Notifica...	Email Notificat...	Record Only	Changed Item	Changed Fields
6	06/16/2016 03...	Super User(SU)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Mr. Carlene Mc...	ZipCode
5	06/16/2016 03...	Super User(SU)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Lamplanet	ZipCode
4	06/16/2016 02...	Super User(SU)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Zummatechi	ZipCode
3	06/16/2016 02...	Super User(SU)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Zummatechi	ZipCode
2	06/16/2016 02...	Super User(SU)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Lamplanet	ZipCode
1	06/16/2016 02...	Super User(SU)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Zummatechi	ZipCode

3. To search for specific notifications you can select the filters from the following list:
  - **Author**—Filter notifications issued to the specified subscriber. Only one person can be selected.
  - **Changed Infoarea**—Filter notifications issued to all subscribed records of the selected infoarea from the dropdown list.
  - **Date of Change from**—Select the start date from which you want to view notifications issued.

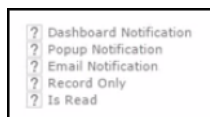
- **Date of Change to**—Select the end date before which you want to view notifications issued.
- **Changed Fields**—Filter the notifications issued for changed to specific fields. You can select multiple fields from the listed fields.

---

**Note:** When you select multiple filters, the search would select notifications that satisfy all the selected criteria.

---

#### 4. Select the notification type and read status filters from the list of items.




---

**Note:** If multiple filters are selected, then search would select a notification if it satisfies any one of the criteria.

---

These filters can toggle between the following three states, indicated by the changing icon. You can click on a filter to toggle between the states. The states and their effect on the filter is described below:

- —In this state, the filter is ignored and not included in the search.
- (Blank checkbox)—In this state, the filter is added as false. This means the notification is selected if the filter item value is false. For example, for the **Is Read** filter, this would mean that a notification is selected if it is marked as not read.
- (selected checkbox)—In this state, the filter is added as true. This means the notification is selected if the filter item value is true. For example, for the **Is Read** filter, this would mean that a notification is selected if it is marked as read.

To select an item perform the following:

- To activate a filter item, click .

The icon changes to a checkbox (.

- To set the value of the filter as **true**, click the checkbox (). Leave the checkbox empty () to set the filter as false. For example, for the Dashboard Notification filter, setting it to true () would mean a notification is included in the search result, if the dashboard notification type was configured in the watchlist item generating the notification.

#### 5. Click Search.

The search result is displayed.

6. For each item in the search list, you can perform the following tasks:
  - a. Marking the notification item as read.

To mark the item as read:

- Click the Action context menu, and select **Mark as Read**.

Change Notifications										
	Change	Author	Is Read	Dashboard Notification	Popup Notification	Email Notification	Record Only	Changed Item	Changed Fields	
View Change Notification Details	12:06 pm	Super User(SU)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Lamplanet	RepID	
Mark As Read	12:06 pm	Super User(SU)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Lamplanet	Country	

A check mark appears in the **Is Read** column for the notification.

Change Notifications								
#	Date of Change	Author	Is Read	Dashboard Notification	Popup Notification	Email Notification	Record Only	
2	06/06/2016 12:06 pm	Super User(SU)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
1	06/06/2016 12:06 pm	Super User(SU)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

- b. Viewing the change notification details.

To view the details of a change notification:

- Click the **Action** context menu, and select **View Change Notification Details**.

Change Notifications										
	Change	Author	Is Read	Dashboard Notification	Popup Notification	Email Notification	Record Only	Changed Item	Changed Fields	
View Change Notification Details	12:06 pm	Super User(SU)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Lamplanet	RepID	
Mark As Read	12:06 pm	Super User(SU)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Lamplanet	Country	

- The Change Notifications Details window displays.

Change Notification Details

---

**Change Notification Details**

Changed Item Person in Company-Mr. Carlene McNary      Date of Change 06/16/2016 03:29 pm  
 Author Super User - SU (10000002)      Is Read

**Changed Fields**

Field Id	Field Name	Field Type	Updated Value
20	ZipCode	Character	34343

Notice that the changed fields are displayed in the window and you can also mark the notification as read from this window too.

## Viewing Change Notifications for a Record

You can view the history of change notifications issued for a specific record or watchlist subscribed item. Similarly you can view the change notifications for all watchlist item subscriptions. This topic describes how to view change notifications issued to all subscribers of a watchlist item.

To view change notifications for a record, perform the following steps:

1. Open the record to which you have added the watchlist item.
2. Select **Menu > Watchlist > View Change Notifications**.

The search notification page displays.

#	Date of Change	Author	Is Read	Dashboard Notification	Popup Notification	Email Notification	Record Only	Changed Item	Changed Fields
2	06/06/2016 12:06 pm	Super User(SU)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Lamplanet	RepID
1	06/06/2016 12:06 pm	Super User(SU)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Lamplanet	Country

**Note:** The Changed Infoarea field is locked to the record for which you are searching for notifications. This field cannot be changed because this function was called from the record's watchlist menu.

3. To search for specific notifications you can select the filters from the following list:
  - **Author**—Filter the notifications issued to the specified subscriber. Only one person can be selected.
  - **Changed Infoarea**—Not editable. This is restricted to the record you selected.
  - **Date of Change from**—Select the start date from which you want to view notifications issued.
  - **Date of Change to**—Select the end date before which you want to view notifications issued.
  - **Changed Fields**—Filter the notifications issued for changed to specific fields. You can select multiple fields from the listed fields

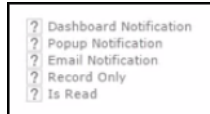


---

**Note:** When you select multiple filters from the above list, the search would select notifications that satisfy all the selected criteria.

---

4. Select the notification type and read status filters from the list of items.




---

**Note:** If multiple filters are selected, then search would select a notification if it satisfies any one of the criteria.

---

These filters can toggle between the following three states, indicated by the changing icon. You can click on a filter to toggle between the states. The states and their effect on the filter is described below:

- —In this state, the filter is ignored and not included in the search.
- (Blank checkbox)—In this state, the filter is added as false. This means the notification is selected if the filter item value is false. For example, for the **Is Read** filter, this would mean that a notification is selected if it is marked as not read.
- (selected checkbox)—In this state, the filter is added as true. This means the notification is selected if the filter item value is true. For example, for the **Is Read** filter, this would mean that a notification is selected if it is marked as read.

To select an item perform the following:

a. To activate a filter item, click .

The icon changes to a checkbox().

b. To set the value of the filter as **true**, click the checkbox (). Leave the checkbox empty () to set the filter as false. For example, for the Dashboard Notification filter, setting it to true () would mean a notification is included in the search result, if the dashboard notification type was configured in the watchlist item generating the notification.

5. Click Search.

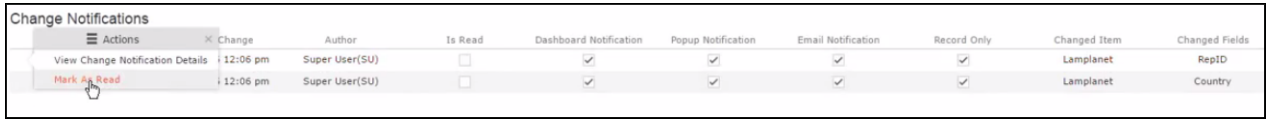
The search result is displayed.

6. For each item in the search list, you can perform the following tasks:

a. Marking the notification item as read.

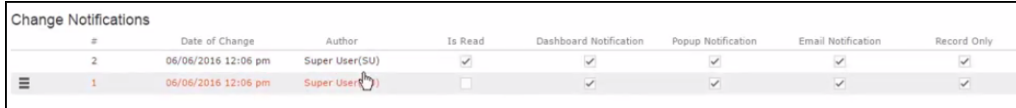
To mark the item as read:

- Click the Action context menu, and select **Mark as Read**.



A screenshot of a 'Change Notifications' table. The table has columns: #, Date of Change, Author, Is Read, Dashboard Notification, Popup Notification, Email Notification, Record Only, Changed Item, and Changed Fields. Two rows are visible. The first row has a checkmark in the 'Is Read' column. The second row has an empty checkbox. A context menu is open over the second row, with 'Mark As Read' highlighted by a mouse cursor.

A check mark appears in the **Is Read** column for the notification.

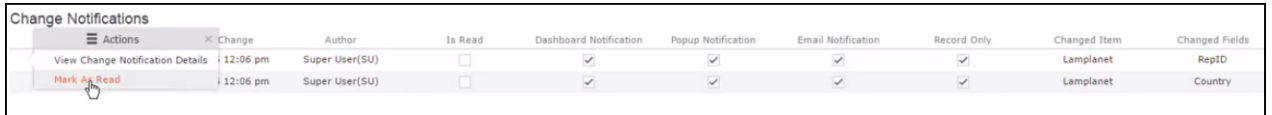


A screenshot of the 'Change Notifications' table after the 'Mark As Read' action. The 'Is Read' column now has a checkmark for the second row. The context menu is no longer visible.

b. Viewing the change notification details.

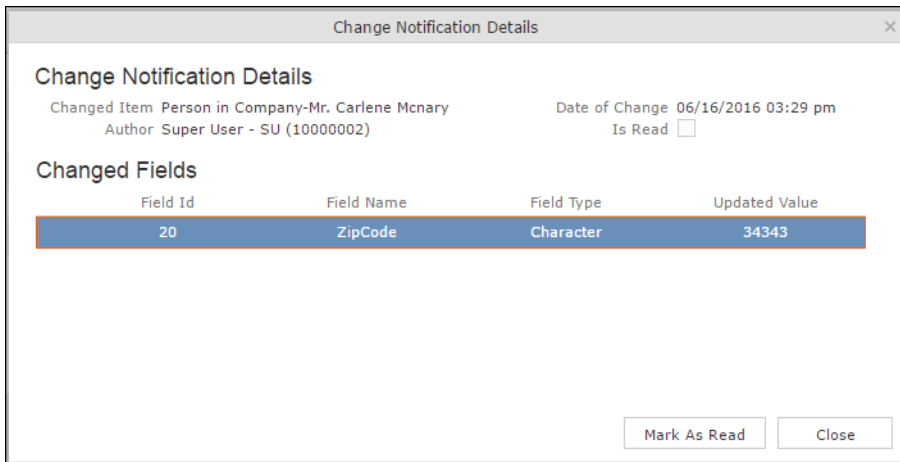
To view the details of a change notification:

- Click the **Action** context menu, and select **View Change Notification Details**.



A screenshot of the 'Change Notifications' table. The context menu is open over the second row, with 'View Change Notification Details' highlighted by a mouse cursor.

- The Change Notifications Details window displays.



A screenshot of the 'Change Notification Details' window. It displays the following information:

- Change Notification Details**
- Changed Item: Person in Company-Mr. Carlene McNary
- Author: Super User - SU (10000002)
- Date of Change: 06/16/2016 03:29 pm
- Is Read:

**Changed Fields**

Field Id	Field Name	Field Type	Updated Value
20	ZipCode	Character	34343

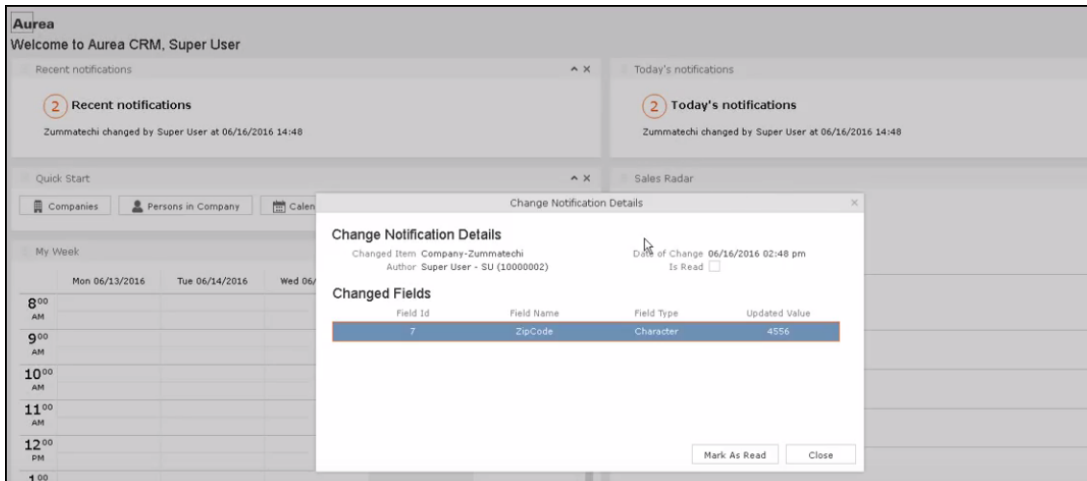
Buttons: Mark As Read, Close

Notice that the changed fields are displayed in the window and you can also mark the notification as read from this window too.

## Marking Change Notification as Read

Once you have read a notification, you can mark it as read. You have to mark the notification as read only once from any of the notification channels: dashboard, popup, or record only.

To mark a change notification from the dashboard, double the notification and the **Change Notification Details** window displays. In this window click **Mark as Read** to mark the notification.



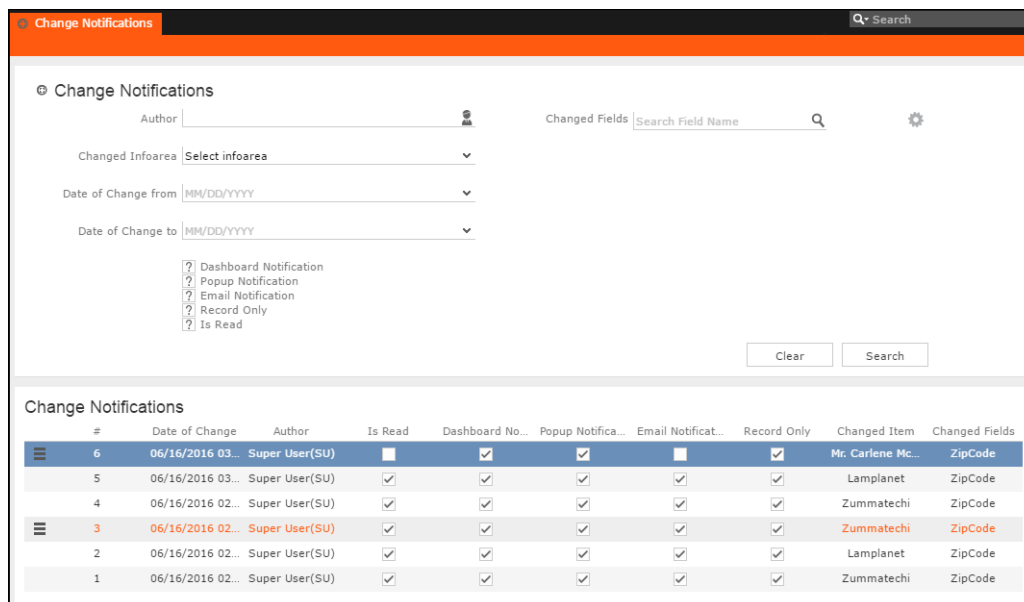
You can also mark a change notification from the change notification search page. To do this:

1. Select **Collaboration > Watchlist > Change Notifications**.

The Change notification search page displays.

2. Enter the required search filters and click Search.

The search results displays.



3. For the required change notification, you can mark it as read in one of the following ways:

a. Marking the notification item as read.

To mark the item as read:

- Click the Action context menu, and select **Mark as Read**.

Change Notifications									
Actions	Change	Author	Is Read	Dashboard Notification	Popup Notification	Email Notification	Record Only	Changed Item	Changed Fields
View Change Notification Details	12:06 pm	Super User(SU)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Lamplanet	RepID
Mark As Read	12:06 pm	Super User(SU)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Lamplanet	Country

A check mark appears in the **Is Read** column for the notification.

Change Notifications									
#	Date of Change	Author	Is Read	Dashboard Notification	Popup Notification	Email Notification	Record Only	Changed Item	Changed Fields
2	06/06/2016 12:06 pm	Super User(SU)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Lamplanet	RepID
1	06/06/2016 12:06 pm	Super User(SU)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Lamplanet	Country

b. Marking the item as read from the change notification details window.

- Click the **Action** context menu, and select **View Change Notification Details**.

Change Notifications									
Actions	Change	Author	Is Read	Dashboard Notification	Popup Notification	Email Notification	Record Only	Changed Item	Changed Fields
View Change Notification Details	12:06 pm	Super User(SU)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Lamplanet	RepID
Mark As Read	12:06 pm	Super User(SU)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Lamplanet	Country

- The Change Notifications Details window displays.

Change Notification Details

---

**Change Notification Details**

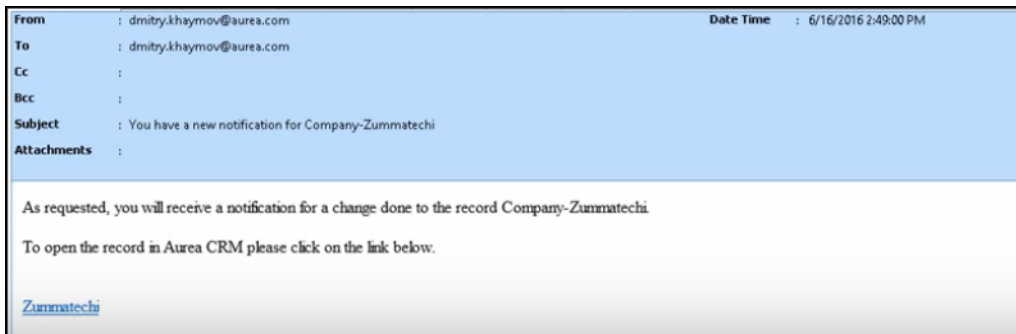
Changed Item: Person in Company-Mr. Carlene McNary      Date of Change: 06/16/2016 03:29 pm  
 Author: Super User - SU (10000002)      Is Read:

**Changed Fields**

Field Id	Field Name	Field Type	Updated Value
20	ZipCode	Character	34343

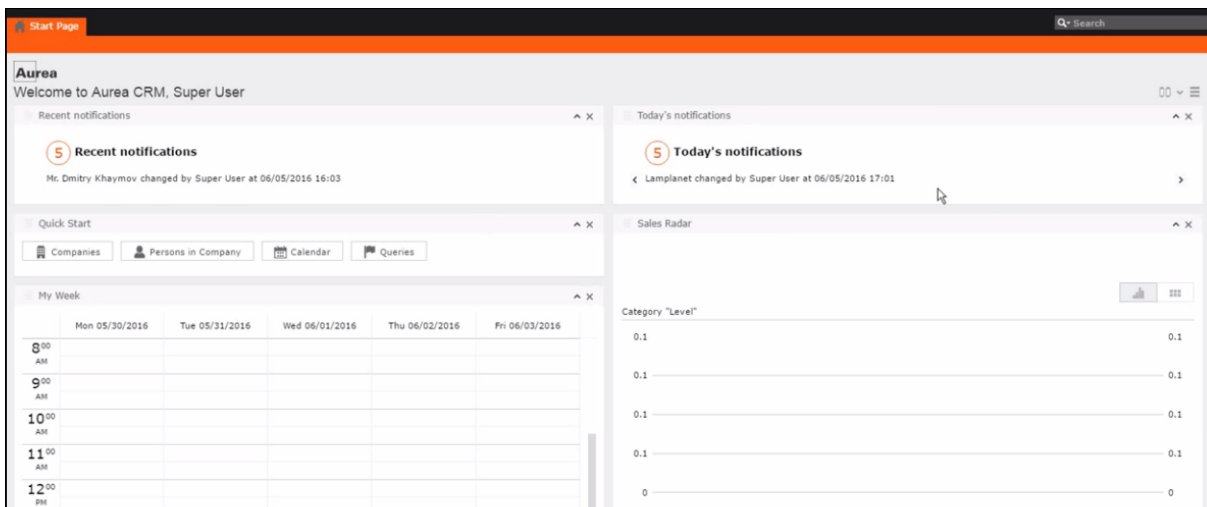
- Click **Mark as Read**.

For email notifications, opening the email will automatically mark it as read. Unlike conventional emails, marking an email notification in the mail client as unread, will not change the status of the notification to unread in the Aurea CRM server. The following screenshot shows a sample email change notification for a company record.



## Change Notifications on the Dashboard

The dashboard can display two types of change notifications, recent change notifications and today's change notifications. See the screenshot below.



**Note:** What you see on the dashboard is mostly configured by your CRM administrator. If you do not see the above, please contact your CRM administrator to enable the notifications.

The **Today's Notification** widget shows you all the change notifications generated today till the current time. This widget is live and gets updated as soon as subscribed watchlist item is changed. The **Recent Notification** widget shows you all the notifications in the previous 30 days, including today. The number of days is configured by the CRM administrator.

When you hover the mouse over either of the widgets, the scroll buttons are activated. Click the scroll buttons to move forward (>) or backward (<) through the list of change notifications.

Double a change notification to open the **Change Notification Details** window. You can mark a change notification as read, by clicking the **Mark as Read** button in this window.

## Analyses

Analyses are based upon queries and display the resulting records in an aggregated form including a graphical representation of relationships, >> [Queries](#) on page 98. You can choose criteria used to display the results graphically as well as taking a drill-down approach to differentiate subtle differences using further criteria.

Your administrator can determine that fields from other info areas are displayed as links. Click on the link to switch to the default view of the linked record.

It should not be viewed as a fully-fledged business intelligence tool, such as Aurea CRM.intelligence.

## Loading an Analysis

To load a previously defined analysis:

1. Select  (**Queries & Analyses**) > **Analyses** from the menu.

All available analyses are listed. You can use search criteria to restrict the analyses displayed.

2. Select **Open** from the context menu.

The details of the analysis are displayed.

You can:

- Edit the analysis, >> [Editing the Analysis](#) on page 161.
- Execute the analysis, >> [Executing an Analysis](#) on page 154.

## Executing an Analysis

To execute an analysis:


1. Load an analysis, >> [Loading an Analysis](#) on page 154.

The **Result** tab displays the values defined in the analysis.

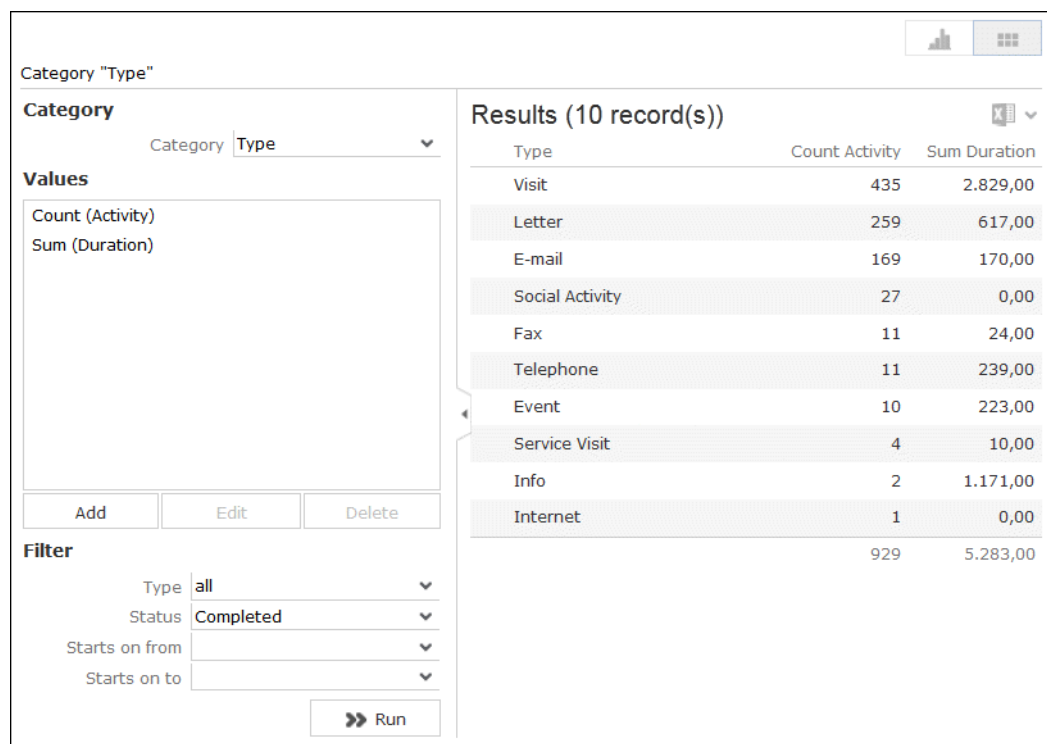
2. Select the desired category from the drop-down list.
3. Click on **Add** to add a new value. Click on **Edit** to edit an existing value.
  - Use the **Type** drop-down list to determine whether the sum or the number of values should be analyzed, or whether a maximum, minimum or the mean should be calculated.
  - Enter data for the filters in the corresponding fields.

#### 4. To execute the analysis:

- Click on **»» (Start)**. The analysis is executed using the values you last entered (**Category, Values, Filters**). The analysis need not be saved.
- Click on **»» (Run Analysis)** to execute the saved analysis.
- Press Enter.

You can also execute analyses directly from the list (after accessing the page by selecting  (**Queries & Analyses**) > **Analyses**). Select **Run** from the context menu.


The results of the quick analysis are displayed to the right of the mask.



The screenshot shows the analysis interface. On the left, there is a category mask for "Type". The "Category" is set to "Type". Under "Values", there are two fields: "Count (Activity)" and "Sum (Duration)". Below these are "Add", "Edit", and "Delete" buttons. Under "Filter", there are dropdown menus for "Type" (set to "all"), "Status" (set to "Completed"), "Starts on from", and "Starts on to". A "»» Run" button is at the bottom of the mask.

On the right, the "Results (10 record(s))" table is displayed. The table has three columns: "Type", "Count Activity", and "Sum Duration".

Type	Count Activity	Sum Duration
Visit	435	2.829,00
Letter	259	617,00
E-mail	169	170,00
Social Activity	27	0,00
Fax	11	24,00
Telephone	11	239,00
Event	10	223,00
Service Visit	4	10,00
Info	2	1.171,00
Internet	1	0,00
	929	5.283,00

5. Click on **Export** () to export the data as either CSV or XML, depending on your settings, >> [Handling Tab](#) on page 55.

**Note:** If you execute an analysis and then edit data in the analysis in another tab, the analysis is not automatically updated. For performance reasons, the results of the analysis is cached. Clicking on **Run Analysis** accesses the data in the cache. In order to update the analysis results, select a different filter and then run the analysis again.

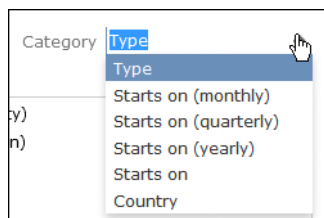
## Changing the Result Categories

You can change the result categories or filter them according to certain criteria.

To change the category:

1. Load an analysis, >> [Loading an Analysis](#) on page 154.
2. Select the desired category from the **Category** drop-down list on the left.

If your analysis includes a date as a category, you can list the sum totals of data in the analysis by month, quarter or year.



3. If fields have been defined as filters in the analysis, you can define filter criteria in order to restrict the results of the analysis.

Filter	
Type	Visit
Status	Completed
Starts on from	
Starts on to	
Country	Austria
<input type="button" value="» Run"/>	

4. Click **Start** to execute the analysis again.

## Cumulative Analyses

Your administrator can define (in CRM.designer) that the highest value in a column is displayed in the sum total, instead of the actual total.

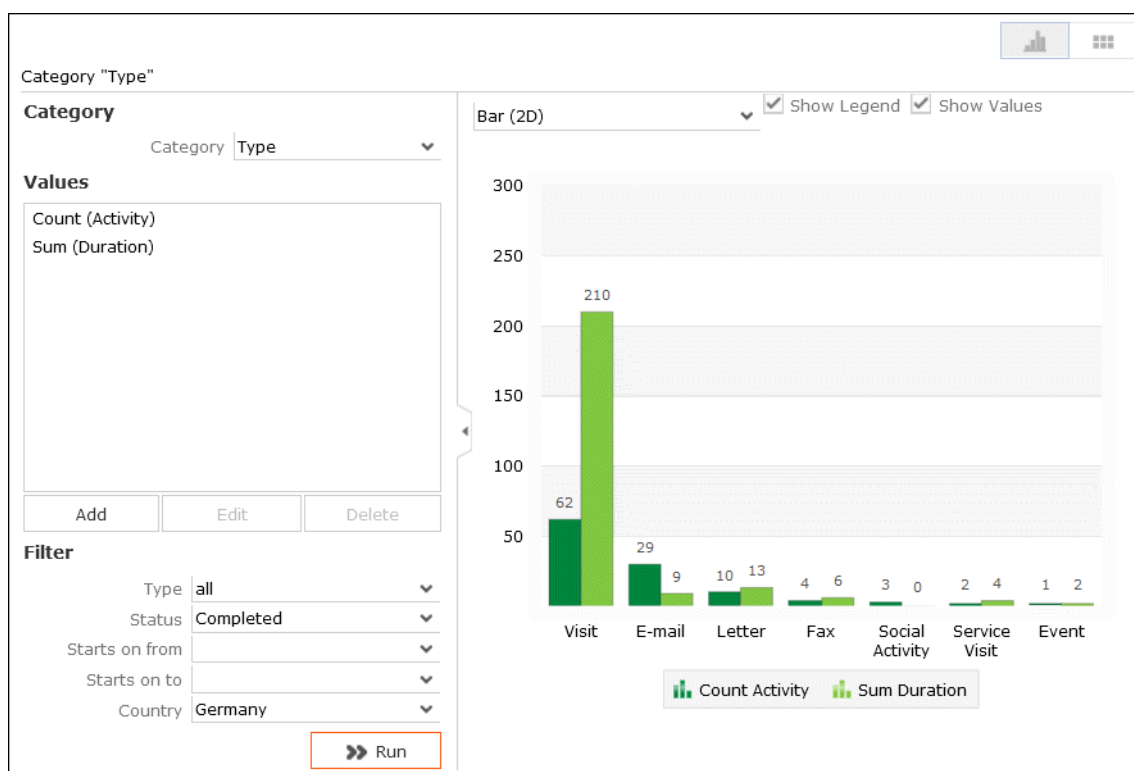
## Displaying Results as Charts

You can display the results of your analysis graphically. You can choose between bar or pie charts.

To display your results graphically:


1. Execute the analysis, >> [Executing an Analysis](#) on page 154.
2. Click on the **Show Chart** tab.
3. Use the drop-down list to determine the type of chart, e.g. a bar or pie chart. The chart is displayed.






## Defining Analyses

To define an analysis:

1. Select  (**Queries & Analyses**) > **New Analysis** and click on **+** (**New**).
2. The **New: Analysis** window is displayed.

3. Enter the name of the analysis. You must enter a name to save the analysis.
4. Determine whether the analysis is **Private** (only you can access it) or **Public** (anyone can access it).
5. Click on  (**Select**) next to the **Query name** field and select the query to base your analysis on.

Various settings are displayed:

**New:Analysis \***

Save Delete Run Analysis

Analysis name  Private Public

Query name PE\_MA (Public)

Categories, Values, Filter, List

**Categories** Hide unused

Category	Disable ...	Show all...
<input checked="" type="checkbox"/> Last Name (Person)	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> First Name (Person)	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Country (Person)	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Date of Birth (Person)	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Type (Activity)	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Status (Activity)	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Starts on (Activity)	<input type="checkbox"/>	<input type="checkbox"/>

**Values** Hide unused

Value	Count
<input checked="" type="checkbox"/> Activity	Count
<input type="checkbox"/> Person	Count

**Filter** Hide unused

Filter must be selected

<input type="checkbox"/> Last Name (Person)	<input type="checkbox"/>
<input type="checkbox"/> First Name (Person)	<input type="checkbox"/>
<input checked="" type="checkbox"/> Country (Person)	<input type="checkbox"/>
<input type="checkbox"/> Date of Birth (Person)	<input type="checkbox"/>
<input checked="" type="checkbox"/> Type (Activity)	<input type="checkbox"/>
<input checked="" type="checkbox"/> Status (Activity)	<input type="checkbox"/>
<input checked="" type="checkbox"/> Starts on (Activity)	<input type="checkbox"/>

**Default Values**

Maximum number of bars 10

Currency field not selected

Default for category

Percentage field not selected

Run Analysis

6. Configure the settings as desired. The following options are available:

- Categories, >> [Defining Analysis Categories](#) on page 158
- Values, >> [Defining Analysis Values](#) on page 159
- Filters, >> [Defining Analysis Filters](#) on page 160
- List, >> [Defining the Analysis List View](#) on page 160

7. Save the analysis.

## Defining Analysis Categories

To define the categories in an analysis:

1. Define an analysis, >> [Defining Analyses](#) on page 157 or load an existing one.
2. Define the categories in the **Categories** area:

Categories			<input type="checkbox"/> Hide unused
	Disable ...	Show all...	
<input checked="" type="checkbox"/> Last Name (Person)	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> First Name (Person)	<input type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/> Country (Person)	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Date of Birth (Person)	<input type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/> Type (Activity)	<input type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/> Status (Activity)	<input type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/> Starts on (Activity)	<input type="checkbox"/>	<input type="checkbox"/>	

### 3. The following options are available:

- The output fields in the query are listed. Enable the check box on the left to determine the fields by which values in the analysis should be grouped.
- **Disable sorting of results:** If this option is enabled, values are not sorted.

If this check box is disabled, the results categories in the analysis are sorted according to the size of the result (sum total / average of the field values or number of records).

This check box is only available for catalog values and date fields.

- **Show all values (even if value is 0):** Enable this check box to display categories even if their value is zero.

## Defining Analysis Values

To define the values in an analysis:

1. Define an analysis, >> [Defining Analyses](#) on page 157 or load an existing one.
2. Define the values in your analysis in the **Values** area.

Only numeric values are listed, as only numeric values can be displayed in the analysis.

Values		<input type="checkbox"/> Hide unused
	Currency-dep...	Percentage-de...
<input checked="" type="checkbox"/> Activity	Count	
<input type="checkbox"/> Person	Count	

The following options are available:

- Use the check box to the left of the values to determine which values data can be analyzed by.
- **Percentage-dependent:** Enable this check box if you want to total all weighted values. You need to have selected a **Percentage Field** from the drop-down under **Define Defaults Values** for this setting to be applied.
- **Currency-dependent:** Enable this check box if you want to convert the contents of currency fields to the currency used by the analysis. You need to have

selected a **Currency Field** from the drop-down list under **Define Default Values** for this setting to be applied.

## Defining Analysis Filters

To define filters for an analysis:

1. Define an analysis, >> [Defining Analyses](#) on page 157 or load an existing one.
2. Define the fields that can be used as filter criteria in the analysis in the **Filters** area.

Categories		Hide unused	
	Disable ...	Show all...	
<input checked="" type="checkbox"/> Last Name (Person)	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> First Name (Person)	<input type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/> Country (Person)	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Date of Birth (Person)	<input type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/> Type (Activity)	<input type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/> Status (Activity)	<input type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/> Starts on (Activity)	<input type="checkbox"/>	<input type="checkbox"/>	

3. The following options are available:

- Enable the check box to the left of a field to allow the field to be used a filter criteria in the analysis.
- **Filter must be selected:** Enable this check box if a value must be selected for the criteria selected under **Filter** before the analysis is executed. Otherwise you will be informed that the analysis cannot be executed.

Use this option if too many records would otherwise be included in the analysis, in which case the analysis may take a long time to execute.

## Defining the Analysis List View

After executing the analysis, you can select **Display Details** from the context menu in the results list to view a list containing the results of the analysis. You need to define which fields are displayed in this list beforehand.

To define the list view for an analysis:

1. Define an analysis, >> [Defining Analyses](#) on page 157 or load an existing one.
2. Click on the **List** tab.
3. Define which fields are displayed in the list and their properties.

Columns for Result Details		
	No. in List	Width
Type (Activity)	3	10
Status (Activity)	5	10
Last Name (Person)	1	25
First Name (Person)	2	25
Country (Person)	4	15
Date of Birth (Person)	6	15
		100%


» Run Analysis

The following columns are available:

- **No. in List:** Enter the position (column number) of the value in the list.
- **Width:** Enter the column width as a percentage of the total width. The sum total of all widths should be 100%.

## Editing the Analysis

To edit an existing analysis:

1. Load the analysis, >> [Loading an Analysis](#) on page 154.
2. Click on  (**Show/Hide**) in the header.

The area used to define the analysis is displayed.

3. Edit the analysis.
4. Save your changes.

If you save an edited analysis under the same name, the analysis is overwritten immediately. If you change the name of the analysis and another analysis with the same name exists, you will be asked whether you wish to overwrite the existing analysis.

---

**Note:** If you edit an existing analysis (i.e. change the info areas, fields and/or conditions), an asterisk (\*) is displayed in the header after the name of the analysis until you save the analysis.

---

## Drill-Down and Drill-Up

You can analyze a value in the analysis further and proceed downwards step by step (drill-down). Conversely you can return from lower levels to higher levels (drill-up). Only the category fields selected in the analysis are available here (apart from those that are analyzed at the top-most level).

**Note:** If your analysis contains locked catalog values, and your administrator has determined that you cannot display locked catalog values, the results of drilling down may differ from the results displayed beforehand.

To drill down step-by-step:

1. Execute an analysis, >> [Executing an Analysis](#) on page 154.
2. Select **Drill-Down** from the context menu to further analyze a value according to further criteria. You can also click on a bar or pie in the graphic to display the context menu.

Results (10 record(s))

Type	Count Activity	Count Person
Menu	1,204	84
Drill down Starts on (monthly)	510	127
Drill down Starts on (quarterly)	406	102
Drill down Starts on (yearly)	161	34
Drill down Starts on	74	4
Drill down Country	54	8
Event	47	10
Fax	32	7
Info	25	6
Internet	9	5
	2,522	215

You can choose from the selected catalog fields in the analysis (apart from those that are analyzed at the top level of the analysis).

3. Select a field.

The details for this field are displayed.

Results (10 record(s))

Starts on	Count Activity	Count Person
Dec 2012	119	56
Nov 2012	81	37
Jan 2013	54	21
Sep 2013	40	13
Aug 2013	34	10
Feb 2013	32	12
Oct 2012	29	20
Jul 2013	23	4
Jun 2013	19	3
other	75	31
	506	127

4. Click on the **Drill-Up** button to move up a level within the analysis or use the breadcrumb trail to navigate to the desired level.

Type "E-mail" > Starts on (monthly) "Dec 2012" > Category "Country"													
<b>Category</b> Category Type	<b>Results (8 record(s))</b>												
<b>Values</b> Count (Activity) Count (Contact Person)	<table border="1"> <thead> <tr> <th>Country</th> <th>Count Activity</th> <th>Count Contact Pers...</th> </tr> </thead> <tbody> <tr> <td>Austria</td> <td>78</td> <td>35</td> </tr> <tr> <td>Hungary</td> <td>13</td> <td>5</td> </tr> <tr> <td>France</td> <td>8</td> <td>2</td> </tr> </tbody> </table>	Country	Count Activity	Count Contact Pers...	Austria	78	35	Hungary	13	5	France	8	2
Country	Count Activity	Count Contact Pers...											
Austria	78	35											
Hungary	13	5											
France	8	2											

## Displaying the Details of an Analysis

To display the details of an analysis, you need to determine the fields that are displayed when defining the analysis, >> [Defining the Analysis List View](#) on page 160.

To display the details:

1. Select **Display Details** from the context menu.
2. A list containing the results of the analysis is displayed. The values you selected in the **List** tab when defining the analysis are displayed here.

Results (7 record(s))						
Last Name	First Name	Type	Country	Status	Date of Birth	
Aki	Chris	Visit	Italy	Sched...		
	Chris	Visit	Italy	Compl...		

3. Click on **Display Details** to display an entry's MiniDetails.

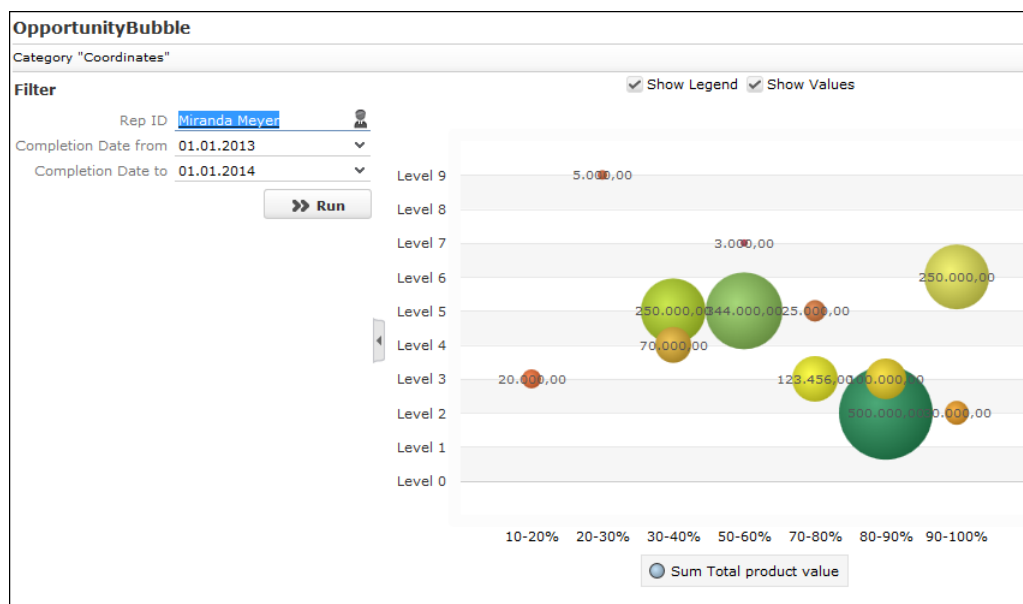
Results (7 record(s))						
Last Name	First Name	Type	Country	Status	Date of Birth	
Aki	Chris	Visit	Italy	Sched...		
Acad. Title		Language English		Nationality		
Date of Bi...	07.02.1977	Rep	Office Rep			

## Bubble Charts

Bubble charts are analyses where data is displayed in the form of bubbles on an X-Y axis.

You can display bubble charts, but you cannot define parameters such as which values and categories are displayed.

Example:

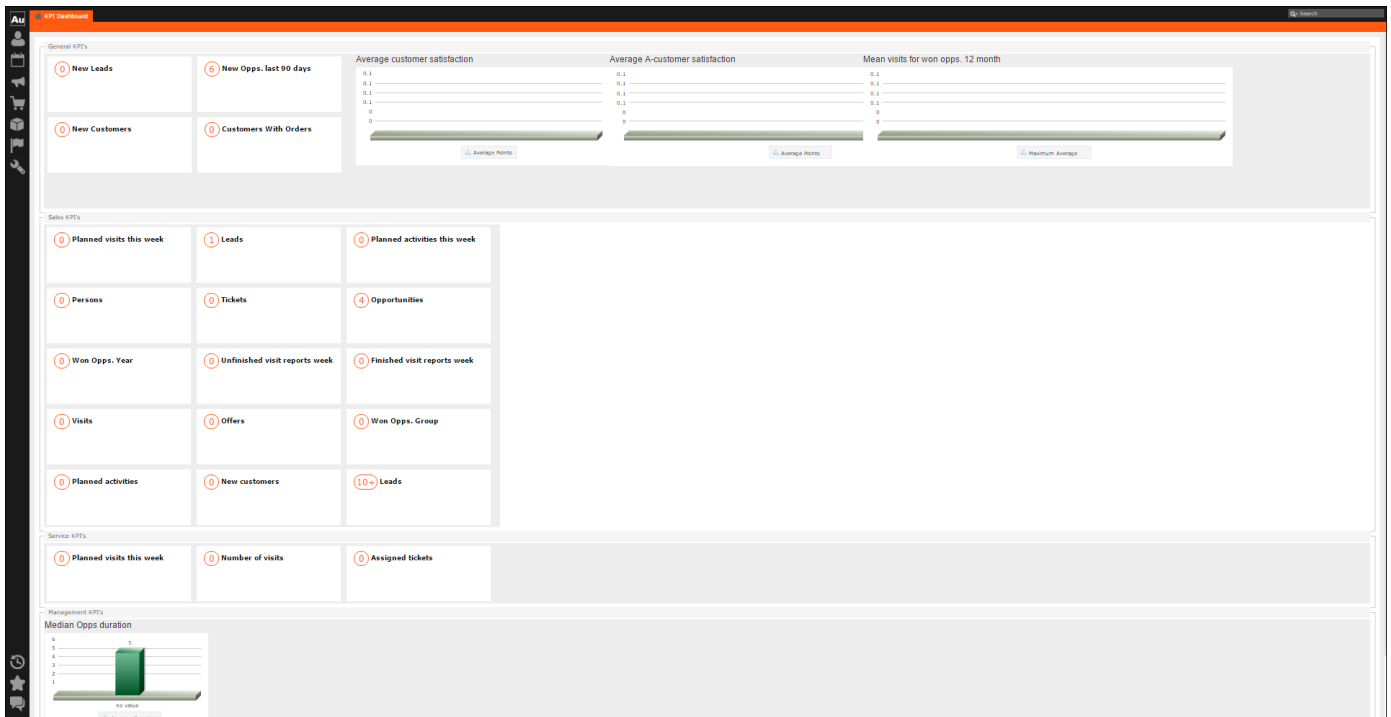


## Key Performance Indicators Dashboard (Enterprise CRM)

The KPI dashboard provides a quick measure of your business metrics primarily focusing on customer development and management. It shows the current state of your sales for existing and new customers. This would be very useful in monitoring open calls, new customers of interest and other related information without having to be informed by e-mail.

The following screenshot shows the KPI dashboard.





You can find the following metrics displayed in the KPI dashboard under various categories:

KPI Category	Type	Name on the dashboard	Description
General	Query	New leads	Number of new potential customers (leads) developed per 90 days.
General	Query	New Opps. last 90 days	Number of new opportunities in the last 90 days.
General	Query	New Customers	Number of new customers (have placed 1 order) in the last 90 days.
General	Query	Customers With Orders	Number of customers have placed total orders greater than X in the last 12 months.  <b>Note:</b> The size of an order in the query is defined by your management. Contact your administrator to reset the order size according to your requirement.

KPI Category	Type	Name on the dashboard	Description
General	3D Bar	Average Customer Satisfaction	Average Customer satisfaction score of all customers this year and value from the previous year (measured per calendar year).
General	3D Bar	Average A-customer satisfaction	Average customer satisfaction score in A customers and the value from the previous year.
General	3D Bar	Mean visits for won opps. 12 month	Mean number of visits for the opportunities won in the last 12 months.
Sales Rep	Query	Planned visits this week	Number of visits planned for this week for the current sales representative.
Sales Rep	Query	Leads	Number of leads (potential customers) for the current sales representative.
Sales Rep	Query	Planned activities this week	Number of visits planned for this week for the current sales representative.
Sales Rep	Query	Persons	Number of new persons planned for the current sales representative.
Sales Rep	Query	Tickets	Number of tickets for the current sales representative.
Sales Rep	Query	Opportunities	Number of opportunities for the current sales representative.
Sales Rep	Query	Won Opps. Year	Number of won opportunities for this year for the current sales representative.
Sales Rep	Query	Unfinished visit reports week	Number of unfinished visit reports for this week for the current sales representative.
Sales Rep	Query	Finished visit reports week	Number of finished visit reports this week for the current sales representative.
Sales Rep	Query	Visits	Number of visits planned for the current sales representative.

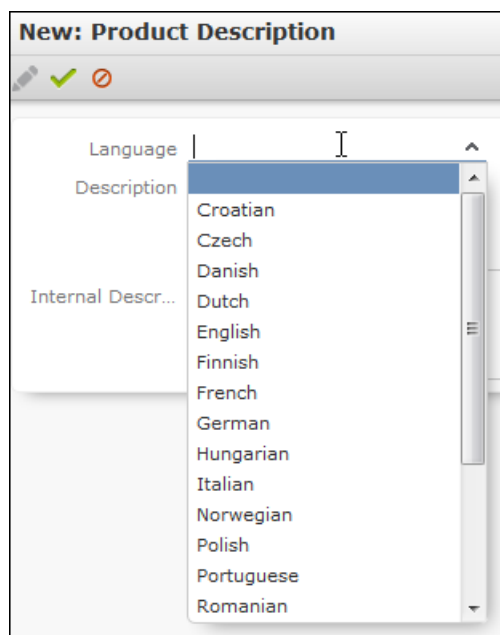
KPI Category	Type	Name on the dashboard	Description
Sales Rep	Query	Offers	Number of offers for the current sales representative.
Sales Rep	Query	Won Opps. Group	Number of won opportunities for rep's sales team (org group) can be used to compared to other teams (gamification).
Sales Rep	Query	Planned activities	Number of appointments planned for the current sales representative.
Sales Rep	Query	New customers	Number of new customers for the current sales representative.
Sales Rep	Query	Leads	Number of leads (potential customers) for the current sales representative.
Service Rep	Query	Planned visits this week	Number of visits planned for this week.
Service Rep	Query	Number of visits	Number of visits done by the service representative.
Service Rep	Query	Assigned tickets	Number of assigned tickets.
Management	3D Bar	Median Opps Duration	Graph depicting the median of the duration of each opportunity.

**Note:** If you wish to have KPIs that show more custom information, contact your Aurea CRM administrator to configure your custom KPI queries and Analyses.

## Multilingual Texts

Your administrator can define that you can enter texts in multiple languages in Aurea CRM web.

By default, you can enter product descriptions in multiple languages. When adding a product description, you can assign it to a particular language:



Your administrator is responsible for determining which languages are available. You need to add a separate (product description) record for each language.

---

**Note:** These texts are stored in the **Text** info area in the database, not in the info area where the field is displayed. Only a reference to the text is entered in the info area the text was entered in. As a result, editing the text in the **Text** table does not update the timestamp fields in the info area referencing the text (e.g. **Product Description**), as the reference to the text remains unchanged.

---

## Idea Management

Aurea CRM's idea management functions can be used to manage ideas submitted by users. These ideas can be processed in a predefined process.

---

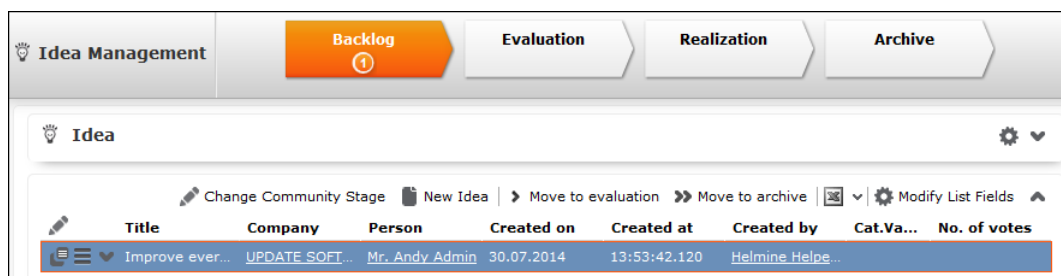
**Note:** Aurea CRM can also integrate CRM.loop into the idea management process. In this case, ideas posted in CRM.loop are automatically available in Aurea CRM web and can be edited. For further information, contact your Aurea representative.

---

To edit ideas:

1. Select  (**Service**) > **Idea Management**.

The **Idea Management** area is displayed.



2. The idea management process consists of the following phases:

- **Backlog:** In this phase, all relevant ideas from the social media platforms are listed. The responsible rep needs to decide whether further processing is necessary. Feedback can be sent to the person who submitted the idea, move the idea to the next phase or move the idea to the **Archive** phase.
- **Evaluation:** During this phase, the idea is analyzed further. The rep needs to decide whether any further processing is necessary, e.g. whether an idea contains a usable suggestion on how to solve the issue that can be feasibly implemented. You can also return the idea to the **Backlog** phase or to the **Archive**.
- **Realization :** The ideas that are being implemented are listed in this phase.
- **Archive :** The ideas whose processing is complete are listed in this phase.

## Adding Ideas

To add an idea:

1. Select  (**Service**) > **Idea Management** and click on **+** (**New Idea**).

The input mask is displayed.

2. Enter a name for the idea in the **Title** field and a description in the **Content** field. Click on **Q** (**Select**) to link the idea to a **Person** or **Company** in the database.
3. Save the record.

The idea is added to the **Backlog** and can be processed.

## Sending Feedback to the Social Inbox's Rep



If an idea was added by the rep responsible for the social inbox (the idea is linked to a twist), you can send feedback. Based on the feedback you provide, the rep responsible for the social inbox can contact the author who originally submitted the idea.

To send feedback:

1. Select the desired idea.
2. Click on  (**Feedback**) This button is only active if an idea is linked to a twist.
3. Enter the text.
4. Save.

## Changing the Community Phase of an Idea


To change the community phase of an idea:

1. Select  (**Service**) > **Idea Management**.
2. Select the desired idea from the search results.
3. You can switch phases as follows:
  - Click on  (**Change Community Stage**), and select the desired phase.
  - Click on the corresponding entries in the phase headers. Example: Click on **Move to backlog** or **Move to archive** in the **Realization** phase.
4. Save the record.

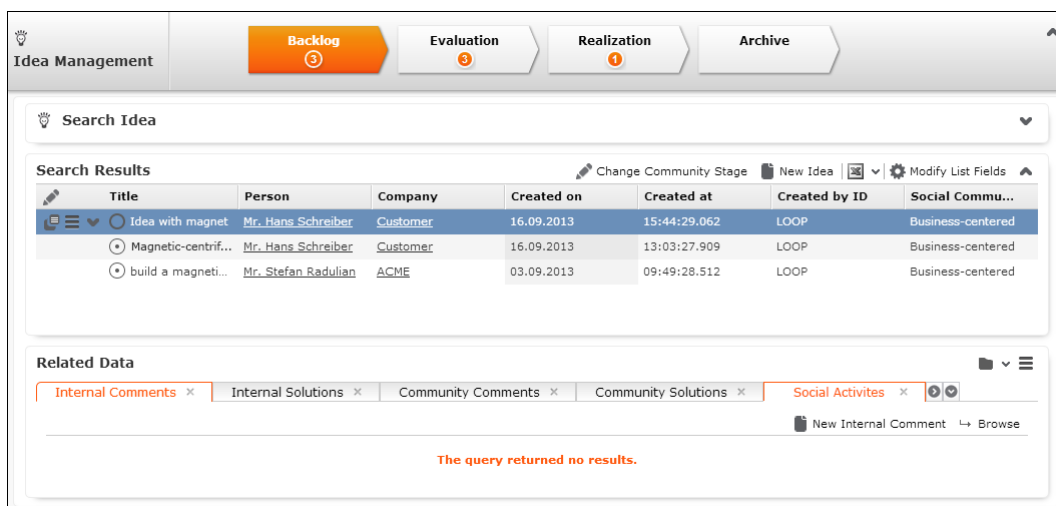
## Adding Comments and Solutions to Ideas

You can add internal and community comments to an idea as well as internal and community solutions.

To add a comment or solution:

1. Select  (**Marketing**) > **Idea Management**.
2. Select the desired idea from the search results.

The comments and solutions are listed under **Related Data** below the search results.



The screenshot shows the 'Idea Management' interface. At the top, there are four tabs: 'Backlog' (3 items), 'Evaluation' (3 items), 'Realization' (1 item), and 'Archive'. Below the tabs is a search bar labeled 'Search Idea'. The main area displays 'Search Results' with a table of ideas. The table has columns for Title, Person, Company, Created on, Created at, Created by ID, and Social Commu... (Social Community). The first row is highlighted in blue.

Title	Person	Company	Created on	Created at	Created by ID	Social Commu...
Idea with magnet	Mr. Hans Schreiber	Customer	16.09.2013	15:44:29.062	LOOP	Business-centered
Magnetic-centrif...	Mr. Hans Schreiber	Customer	16.09.2013	13:03:27.909	LOOP	Business-centered
build a magneti...	Mr. Stefan Radulian	ACME	03.09.2013	09:49:28.512	LOOP	Business-centered

Below the table is a 'Related Data' section with tabs for 'Internal Comments', 'Internal Solutions', 'Community Comments', 'Community Solutions', and 'Social Activites'. The 'Social Activites' tab is active. At the bottom of the 'Related Data' section, there is a message: 'The query returned no results.'

3. Switch to the desired tab and click on **+** (**New**) to add a new record.
4. Activities generated automatically from the social inbox are listed on the **Social Activities** tab.

## CRM.launcher

CRM.launcher (included with Aurea CRM web) is required to perform certain actions in the application. The first time you initiate an action that requires CRM.launcher, a message that CRM.launcher needs to be installed on your computer is displayed. You can install CRM.launcher by clicking the link in this message, >> [Installing CRM.launcher](#) on page 171.

CRM.launcher is required for:

- Mass mailings
- Quick campaigns
- Checking out documents
- Aurea CRM web offline
- CRM.phone (if installed)

---

**Note:** Aurea software recommends using Google Chrome as your browser, as problems may occur under certain circumstances when using Firefox.

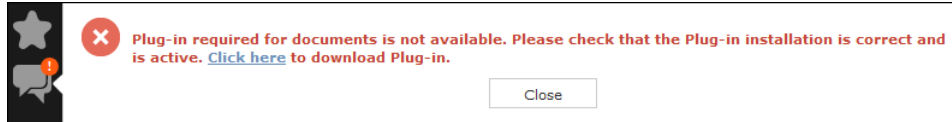
---

## Installing CRM.launcher

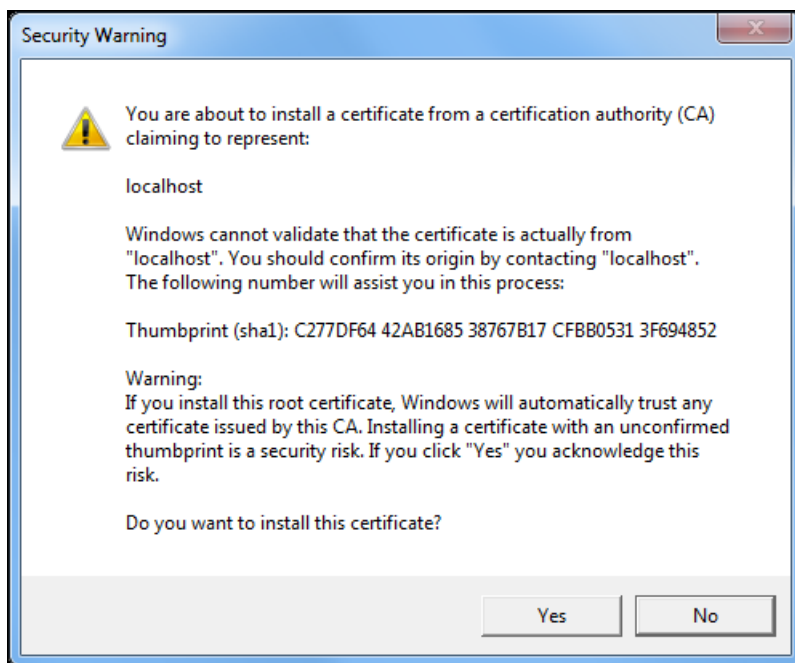
To install CRM.launcher:

1. Perform an action that requires CRM.launcher, e.g. check out a document.

The following message is displayed:





2. Download the application and executed CRM.launcher.exe. CRM.launcher is installed automatically.
3. Confirm the installation (**Finish** button in the **CRM.launcher - InstallShield Wizard**).
4. Once the installation is complete, a certificate is displayed. You need to install this certificate.



5. Return to Aurea CRM web and perform the action again.

## CRM.launcher in the Windows Taskbar

Once you have started CRM.launcher, the  (CRM.launcher) icon is displayed in the Windows taskbar on the right. Right-click on the icon to access the available functions:

1. Right-click on  in the taskbar.
2. Select the desired option:
  - **Check for Updates**, >> [Check for Updates](#) on page 173.
  - **Open offline CRM** or **Open online CRM**, >> [Starting Aurea CRM web offline in Offline or Online Mode](#) on page 175.



---

**Note:** These options are only available if you have installed the latest version.

---

- **Settings**, >> [Switching Languages](#) on page 173, [Creating Bug Reports](#) on page 174 and [Port Settings](#) on page 174.
- **Exit**

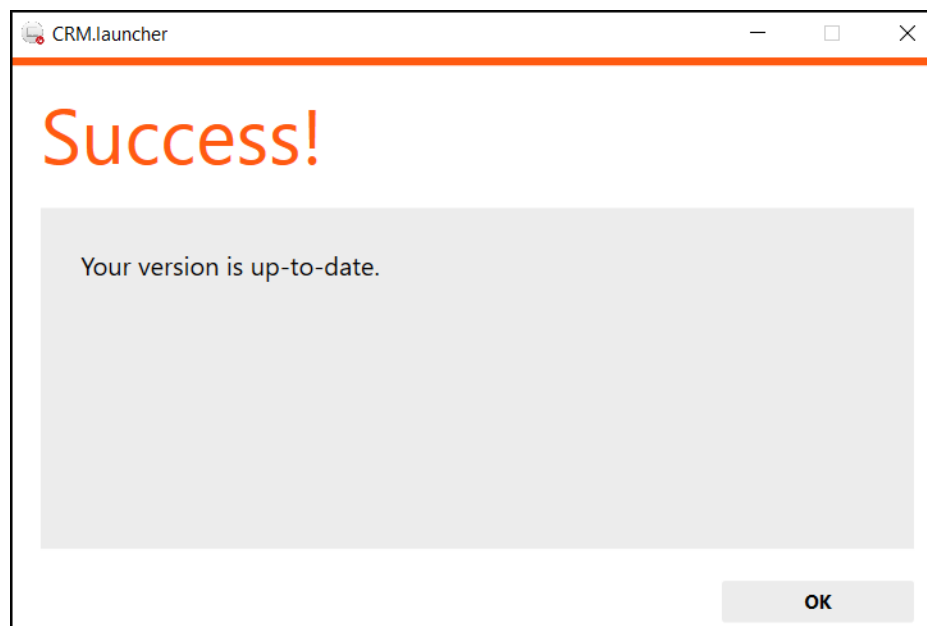
## Check for Updates

Select this option to update the application if an update is available.

Select **Check for Updates**:

- If an update is available, it is installed.
- Contact your administrator if CRM.launcher determines that the version on the server is not compatible with your client version, and no update is available.

Once you have completed the installation, you can choose to work in online mode (if you have a network connection) or in offline mode:



## Switching Languages


To change the language:

1. Right-click on the CRM.launcher icon (🖱️) in the taskbar and select **Settings** from the context menu.
2. Select the desired **Language** from the drop-down list on the **General** tab.
3. Click on **OK**.

## Creating Bug Reports

If problems occur while working with Aurea CRM web offline, you can create a ZIP file and send it to your administrator for analysis.

To create an error report:

1. Right-click on the CRM.launcher icon () in the taskbar and select **Settings** from the context menu.
2. Switch to the **Troubleshooting** tab and click on (**Create Bug Report**).

The **Bug Report - Options** dialog is displayed.

3. Enter a path for the log file in the **Bug report zip file** field and enable the check boxes to determine what to include in the file (**CRM.designer configuration**, **CRM database**, **Log files**). By default, **Log files** is enabled.

---

**Note:** Including the CRM database in the file may take a long time and require significant storage space on your hard disk.

---

4. Click **OK** to save create the ZIP file.
5. You can then send the file to your administrator.

## Port Settings


---


**Note:** **Only** change these settings if requested to do so by your administrator! Your administrator should provide you with information on which port to enter.

---

Your administrator can determine that you cannot change the port.

## Closing and Restarting CRM.launcher

If CRM.launcher is already installed, but you are unable to perform actions requiring CRM.launcher, verify that CRM.launcher is running (the  icon is displayed in the system tray). If the icon is not display, start CRM.launcher from the Windows Start menu.

If CRM.launcher is active, and you are notified that a new version can be installed, you need to close CRM.launcher before installing the new version. Click on  and select **Exit** from the popup menu to close CRM.launcher. CRM.launcher is automatically started after installing the update.

## Uninstalling CRM.launcher

If necessary, you can uninstall CRM.launcher from Window's control panel (as with any other application).

## Using CRM.launcher with Mozilla Firefox

If you are using Mozilla Firefox, you may be unable to perform actions (e.g. check out a document) despite CRM.launcher being installed. In this case, switch to another browser (Google Chrome or Internet Explorer). If you need to work with Mozilla Firefox, contact your administrator.

## Aurea CRM web offline

Aurea CRM web generally accesses data in the database in online mode. Depending on your tasks (e.g. if you are often in the field) and your network connection, you may not always have online access to the database. You can work in offline mode instead in such cases.

---



**Note:** In order to work in offline mode, you require Aurea CRM web offline. Aurea CRM web offline is not included with Aurea CRM web by default. Contact your Aurea representative if you wish to acquire this add-on.

---

## Starting Aurea CRM web offline in Offline or Online Mode

To start Aurea CRM web in either online or offline mode:

1. Start Aurea CRM web using CRM.launcher. Two options are available:

- Click on either  (**Open offline CRM**) or  (**Open online CRM**) after installing the latest version.
- Select on either **Open offline CRM** or **Open online CRM** from CRM.launcher's context menu.

2. The system then checks when data was last synchronized, and you can choose whether you wish to synchronize data. You can only synchronize data if you can connect to the online database.

---

**Note:** Synchronize your data as often as possible. Note that depending on your network connection and the volume of data you are synchronizing, the synchronization process may take some time.

---

3. Click **Offline Synchronization** to start synchronizing.
4. Once synchronization is complete, you can choose to use Aurea CRM web in online mode or to switch to offline mode.

## Administrative Tasks

You can perform administrative tasks in Aurea CRM web. However, you require the necessary access rights to do so, >> [Roles and CRM Processes](#) on page 17. If you do not have the necessary access rights, contact your system administrator.

For further information on administrative tasks (including those not described in this manual), >> *Aurea CRM web Administrator Guide*.

## Invalidate Cache

You can invalidate the server's temporary cache. This is useful if you have made changes using CRM.designer and want these changes (e.g. a renamed field) to be applied immediately.

---

**Note:** If you invalidate the cache, it is reset for **all** users and therefore has an impact on performance.

---

To invalidate the cache:

1. Select **Settings** () > **Invalidate** .

The server's cache is reset for all users.

2. Press F5 to refresh the application.

The application loads again and the changes to the configuration are visible.

## Background Queries

Queries may take some time to execute, depending on the volume of data that needs to be searched. In order to be able to continue working with Aurea CRM web while the query executes, you can execute queries in the background. Note that executing complex queries may impact negatively on the performance of the server.

---

Your administrator can determine that queries are always executed in the background at a specific time (e.g. at night). The results are then available the next day.

A To-Do record is created for each background query with the type set to "Calculation". The server is either executed by the server immediately or at a point in time set by your administrator using the rep's access rights. The rep is sent a message once the query has finished executing.

To display To-Dos for background queries:

1. Select **Queries & Analyses > Background Queries** from the menu


The To-Dos stored for background queries are listed. Queries that have already been executed are indicated by a tick (✓) in the **Status** column.

2. Click in the **Link** column to display the results of the query.

## Application Settings

As administrator, you can determine the appearance of Aurea CRM web and determine which actions are available by default, e.g. in sub-lists.

To configure Aurea CRM web:

1. Select () **Settings > Maintenance > Application Settings** .
2. Switch to the desired tab, >> [Layout Tab](#) on page 177, [Handling Tab](#) on page 178, [Queries Tab](#) on page 180, [Analyses Tab](#) on page 182 and [CRM.phone Tab](#) on page 183.
3. Define the desired settings.
4. Save the settings.

---

**Note:** Some settings are not applied immediately. You should therefore log out of Aurea CRM web and then log on again.

---

## Layout Tab

Use the **Layout** tab to configure Aurea CRM web's display.

**Application Settings**

✓

Layout Handling Queries Analyses CRM.phone

Initial letters for rep list (empty to use 'RepUtils\_text' Nr 58) A,B,C,D,E,F,G,H,I,J,K,L,M,N,O,P,Q,R,S,T,U,V,W,X,...

Max. number of reps per click in rep tree 30

Global node settings for tree views  Display the number of records for group nodes  
 Only show the icon for expanding branches if the branch actually contains records

Default ListParams includeConditionalRights,true

Default ListParams for Sublists showCount,50

- **Initial letters for rep list (empty to use 'RepUtils-text' No. 58):** Enter the letters that should be displayed as links in the rep list. If you do not have any employees whose name begins with "X", you do not need to include the letter "X" in the list. Separate individual letters by a semicolon (;).
- **Max. number of reps per click in rep tree:** Determine the maximum number of reps that are displayed within a group in the tree. If more reps are stored in the database than can be displayed, this is indicated by displaying "..." as the last visible entry.
- **Global node settings for tree views:** The following options are available:
  - **Display the number of records for group nodes:** Determines whether the number of records is displayed per node in brackets.
  - **Only show the icon for expanding branches if the branch actually contains records:** Enable this option to display an icon next to nodes in the tree if child data is available. Clicking on the icon opens the branch.
- **Default ListParams:** The default parameters applied to lists.
- **Default ListParams for Sublists:** The default parameters applied to sub-lists.

## Handling Tab

Use the **Handling** tab to configure Aurea CRM web's behavior.

Layout	Handling	Queries	Analyses	CRM.phone
	Document overwrite mode	Prompt before overwriting documents		▼
	E-mail icon action	Open e-mail		▼
	E-mail open separator	Semicolon (Outlook)		▼
	Max. records for search (0 for unlimited)			
	Max. number of exported records	1000		
	Default menu action when a record is clicked	A_Expand		
	Default action for sub-lists			
	Process default action	A_Select		
	Process default menu	M_Wizard		
	Company-Related" option off	AU		
	Favourites	PE,FI,KP,CM		
	Info areas (or "ALL") with disabled Table Caption Cache			
	AutoSearch default value for linked searches	<input checked="" type="checkbox"/>		
	Max. number of history records	10		
	Transfer configuration information to XML exports	<input type="checkbox"/>		
	Enable link deletion	<input checked="" type="checkbox"/>		
	Only match up persons in same company	<input type="checkbox"/>		
	Users can rearrange tabs and groups on masks	<input type="checkbox"/>		

- **Document overwrite mode:** Determines the behavior of Aurea CRM web if a user attempts to overwrite an existing document. The following options are available:
  - Never overwrite existing documents (default)
  - Prompt before overwriting documents
  - Always overwrite existing documents
- **E-mail icon action:** Determines the behavior of Aurea CRM web if a user clicks on the e-mail icon.
  - Open e-mail: Opens the user's e-mail client and enters the e-mail address in the **To:** field.
  - Add activity: E-mails can only be sent once a new activity has been added.
  - Ask user: Allows users to choose whether to add an activity or start their e-mail client.
- **E-mail open separator:** Define the separator used between multiple e-mail addresses in fields (**To**, **Cc**, **Bcc**) in the e-mail client; e.g. semicolon (;) for Microsoft Outlook and comma (,) for Lotus Notes. The default value is Semicolon (Outlook).
- **Max. records for search (0 for unlimited):** Determine the maximum number of search results. The default value is 0, which lists all results that meet the defined search criteria.

Use this setting to restrict the number of results. If less hits are returned, all results are listed. If more hits are found, a message is displayed asking users to further restrict their search criteria.

- **Max. number of exported records:** Define the maximum number of records that are exported. The default value is 1000. Enter -1 for no limit.
- **Default menu action when a record is clicked:** Determine the default action that is carried out when clicking on a record in a list.
- **Default action for sub-lists:** Determine the default action carried out whenever a user double-clicks in a sub-list.
- **Process default action:** Determine the default action carried out whenever a user double-clicks on an entry in a list within a process (wizard). The default value is `A_Select`.
- **Process default menu:** Determine the default menu displayed for list entries in processes (wizards).
- **"Company-related" option off:** Specify the info areas where the **Company-related** check box should not be displayed on the mask.
- **Favorites:** Specify which info areas' records can be added to a user's favorites.
- **Info areas (or "ALL") with disabled Table Caption Cache:** Enter the info areas whose table captions should be queried anew directly from the server. Separate entries using a comma. If you enter "ALL", data in all info areas is reloaded. This can impact negatively on the performance of the system.
- **AutoSearch default value for linked searches:** If this option is enabled, linked searches (e.g. from a linked field) are started automatically.
- **Max. number of history records:** Define the maximum number of entries in the history.
- **Transfer configuration information to XML exports:** Enable this check box to export additional information in XML files, such as field names and types.
- **Enable link deletion:** Determines whether users may delete links.
- **Only match up persons in same company:** Determines whether persons added to the database are only matched up within the same company, or with all persons in the database.

## Queries Tab

Use the **Queries** tab to configure the display of queries.



Layout	Handling	Queries	Analyses	CRM.phone
		Load query from	Both; CRM.designer first	▼
		Save query to	update.CRM	▼
		Store public queries in	CU_Customer	▼
		Show from all parent configurations	<input type="checkbox"/>	
		Highlighted info areas	FI,KP,MA	
		Max. number of records returned by query	1000	
		Limit for count requests	0	
		Steps for query records	20,50,100,1000,10000	
		Default number of records for query execution	100	
		Query rights	all	▼
		Info areas with generic links		
		Info areas to be used in generic links		
		Encoding of exported queries (e.g. "Export.Encoding=UTF-1...		
		Query parameters	<input type="checkbox"/> Disable exporting of query results	
			<input type="checkbox"/> Disable saving of query results	

- **Load query from:** Enter the database (Aurea CRM or CRM.designer) from which queries are loaded.
- **Save query to:** Enter the database to which queries should be written.
- **Store public queries in:** Enter the configuration used to store global queries and analyses. If you leave this entry empty (default), global queries and analyses are saved to the user's highest level write-enabled configuration.
- **Show from all parent configurations:** Determines whether queries defined in parent configurations should also be displayed in addition to the queries in the current configuration.
- **Highlighted info areas:** Specify the info areas that are displayed in bold when creating a new query. Separate entries using a comma.
- **Max. number of records returned by query:** Define the maximum number of records that are returned by a query. The default value is 1000. Enter –1 for no limit.
- **Limit for count requests:** The count function only counts the number of records returned, rather than carrying out the query. Aurea recommends disabling this function by setting this value to 0, as this function requires system resources.  
Use this setting to restrict the number of results. If less hits are returned, the number of hits is displayed. If more hits are returned, a message is displayed. Enter –1 for no limit.
- **Steps for query records:** Determine steps for the number of records displayed per page. Before executing the query, users can select one of these values from a list.

- **Default number of records for query execution:** Determines the default number of results displayed per page for each step.
- **Query Rights:** Assign appropriate query access rights:
  - disabled: Users are unable to execute queries.
  - read-only: Users can carry out predefined queries but are unable to define new analyses.
  - read + define: Users can edit existing queries and add new queries. Queries can be saved as private queries.
  - all: Users can also define global queries.
- **Info areas with generic links:** Determine which info areas can be linked to other areas using generic links. Separate entries using a comma.
- **Info areas to be used in generic links:** Determine the info areas that can be accessed using generic links from the info areas defined under **Info areas with generic links**. Separate entries using a comma.
- **Encoding of exported queries (e.g. "Export.Encoding=UTF-16"):** Determine the character set used to export queries; e.g. UTF-16 or UTF-8.
- **Query parameters:** The following options are available:
  - **Disable exporting of query results:** Determines whether users may export query results.
  - **Disable saving of query results:** Determines whether users may save query results.

## Analyses Tab

Use the **Analyses** tab to configure the display of analyses.

Layout	Handling	Queries	Analyses	CRM.phone
Max. records in analysis		1000		
Analysis rights		all <span>▼</span>		
Analysis criteria are case-sensitive		<input type="checkbox"/>		
Available categories for date fields in analyses		DateMonthly,DateQuarterly,DateYearly,\$		

- **Max. records in analysis:** Determine the maximum number of records returned by the query used as the basis for an analysis. If less records are returned, they

are displayed. If more records are returned, a message is displayed. The default value is 1000. Enter -1 for no limit.

- **Analysis rights:** Assign appropriate analysis access rights:
  - disabled: Users are unable to execute analyses.
  - read-only: Users can carry out predefined queries but are unable to define new analyses.
  - read + define: Users can edit existing analyses and add new ones. Analyses can be saved as private analyses.
  - all: Users can also define global analyses.
- **Analysis criteria are case-sensitive:** Enable this check box to restrict the results of the analysis using upper and lower case.
- **Available categories for date fields in analyses:** Enter the categories available to users for evaluating data.

## CRM.phone Tab

Use the **CRM.phone** tab to influence the behavior of CRM.phone.

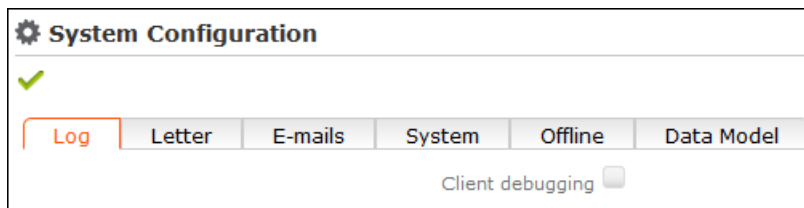
Layout	Handling	Queries	Analyses	CRM.phone
Incoming call action <span>Popup question</span> ▼				
Format of area and country code suggestions for telephone ... <span>+{countryCode}{areaCode} {number}</span>				
Show CRM.phone panel on phone event <input type="checkbox"/>				

- **Incoming call action:** Determine the action that is carried out when an incoming call is received:
  - Do nothing: No action is carried out
  - Popup question: The user is prompted when an incoming call is received.
  - Automatic URL redirect: The URL/process defined in the telephone profile is opened.
- **Format of area and country code suggestions for telephone:** The format used to display the entire phone number.
- **Show CRM.phone panel on phone event:** Enable this check box to display the CRM.phone toolbar at the top of the application when Aurea CRM web is started.

## System Configuration

The system configuration settings define global settings, e.g. for sending e-mails, debugging etc.

Select  **Settings > Maintenance > System Configuration** .



---

**Note:** Aurea recommends only changing these settings after consulting your Aurea representative.

---

## Data Model

You can edit field names in Aurea CRM web. These changes are saved in the data model.

---

**Note:** Only one user can edit the data model at any time. If another user is editing the data model, a message is displayed and you will only have read access to the data model.



---



## Editing Field Names

You can edit the field names to reflect the terminology used in your company or sector.

Changes to field names apply to all users (the next time they log in).

To edit field names:

1. Select **Settings** () **> Maintenance > Data Model > Fields** .
2. Select the desired info area from the drop-down list.  
All fields in the info area are displayed.
3. Click on  (**Show/Hide Columns**) to determine which columns are displayed in the list.
4. Enter all or part of the field name you want to edit in the search field to restrict the listed fields.
5. You can only edit the name in the languages you have been granted access to by your administrator. Click on the desired field. The field's name in all languages is displayed on the right.

6. Click on  (**Help**) to display information on how you can reuse existing field names.
7. Click on  (**Apply all changes**) to apply your changes to the data model.

## Catalog Maintenance

Catalogs can only be maintained on the catalog maintenance station. Ask your system administrator which station is your catalog maintenance station, >> *CRM.core Administrator Guide*.

Catalog maintenance in Aurea CRM web covers the following tasks:

- Add new catalog values
- Edit existing catalog values (except in the base language)
- Define how catalogs are sorted
- Lock/unlock catalog values and edit external keys

Your access rights determine which catalogs you may edit and in which languages.

---

**Note:** You cannot merge or delete catalog values in Aurea CRM web. You also cannot edit texts and external keys in the catalog base language.

---

To carry out catalog maintenance:

1. Select () **Settings > Maintenance > Catalog Maintenance** .

The search is dis-

played.

The screenshot shows a dialog box titled "Edit value for catalog 'Expense Budget Type'". The main text indicates that the catalog "Expense Budget Type" (No. 5069) is used in Receipt, Call Expense, and Expense Budget. Below this, the "Base language - TE\_CATALOG\_BASE\_LANG:" section contains the following fields:

- Text: Meal (BASE)
- External Key: 10002\_5069\_2
- TenNo: 9000
- Description: LSI&CG
- Valid from: (empty dropdown)
- Valid until: (empty dropdown)
- Catalog Code: 2
- Sort: b
- Lock:

At the bottom of the dialog box, there are four buttons: "<", ">", "Save", and "Cancel".

2. Enter search criteria to find the catalog you wish to edit:

- The Info Area and Catalog drop-down lists only contain those entries that you are permitted to access.
- If you select an info area, the Catalog drop-down list only displays catalogs used in the selected info area. If you do not select an info area, all catalogs that you are able to access are listed in the Catalog field.
- Enable the language check boxes to limit the search to texts in the selected languages. By default, the catalog base language and the language you are currently using are selected. The catalog base language is automatically selected and cannot be unselected.

3. Click on Start Search.

4. The corresponding catalog values in the selected languages are listed.

5. Double-click on an entry to edit it.

The following dialog is dis-

**Edit value for catalog "Product Group"** ✕

Catalog "Product Group" (No. 86) is used in: Activity, Requirement, Offer, Order, Potential, Sales Group, Consultation Topic, Lead Status, Asset Value, Account, Loan, Personal Insurance, Bldg. Soc. Sav., Securities Account, Service, Product Overview, Survey, Product Master, Contract, Motor insurance, Property Insurance, Security, Role, -x- Ideal product, Revenue Statistics, Act. Execution, -x- Info 2, Ticket, Qualification, Opp. Competitor, Opp. Product, Sales Territory Management, Sales Optimization, Sales Optimization Configuration, Sales Optimization Special Configuration, Property, ufc Sub-product group Attribute, Real Estate, ufc Housing, Desired Real Estate, Product Range - Inc. / Expend. Cat. - Mapping, Product Role Allocation, Discussed Product

**Base language - Base:**

Text	86_9000_2	Catalog Code	2
External Key	10003_86_17	Sort	0
TenNo	9000	Lock	<input type="checkbox"/>
Description	_____		
Valid from	_____ ▾	Valid until	_____ ▾

**English**

Text	Account	Sort	0
External Key	_____	Lock	<input type="checkbox"/>
Description	_____		
Valid from	_____ ▾	Valid until	_____ ▾

played:

Information on the catalog is displayed at the top, such as the name of the catalog, the catalog number, the info areas the catalog is used in, the parent catalog etc.

You can only edit the sort order and lock/unlock entries in the catalog base language. You can edit the texts in all other languages as well as the external key.

6. Enter the desired values.
7. Click on Save to close the dialog. You can use the navigation buttons to move to the previous and next catalog values. When using the navigation buttons, any changes are saved automatically before navigating.

## Mass Data Updates

You can update large volumes of data at once tasks in Aurea CRM web. For example, should an employee leave your company, the rep's customers will need to be assigned to a new rep. You can apply a mass update in order to search for and assign all the old rep's customers to the new rep in a single step.

---

**Note:** If you only wish to update a small number of records, you can also use the functions described in [Editing Multiple Records in the List Simultaneously](#) on page 83. The mass data update function is intended for large volumes of data.

---

Which info areas and fields you can edit depend on your access rights.


---

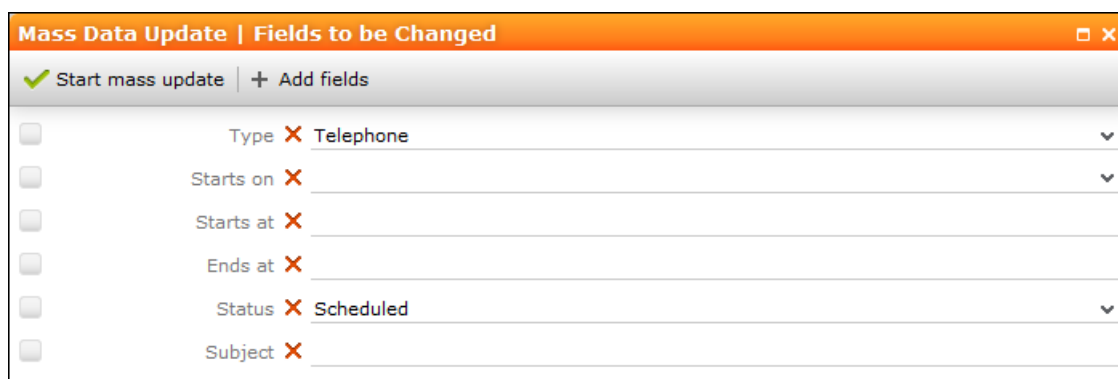
**Note:** Mass updates are applied asynchronously via CRM.server.

---

## Performing Mass Updates

To carry out a mass update:

1. Select **Settings** () > **Maintenance** > **Mass Data Operations** .
2. Select the info area the changes should be applied to and click on **Show Search**.
3. Enter your search criteria or define a filter, >> [Searching](#) on page 60.
4. Determine whether the entries in the results list match the data you want to edit/delete.
5. Click on **Edit**.
6. The **Mass Data Update | Fields to be Changed** dialog is displayed, containing all fields in the list.



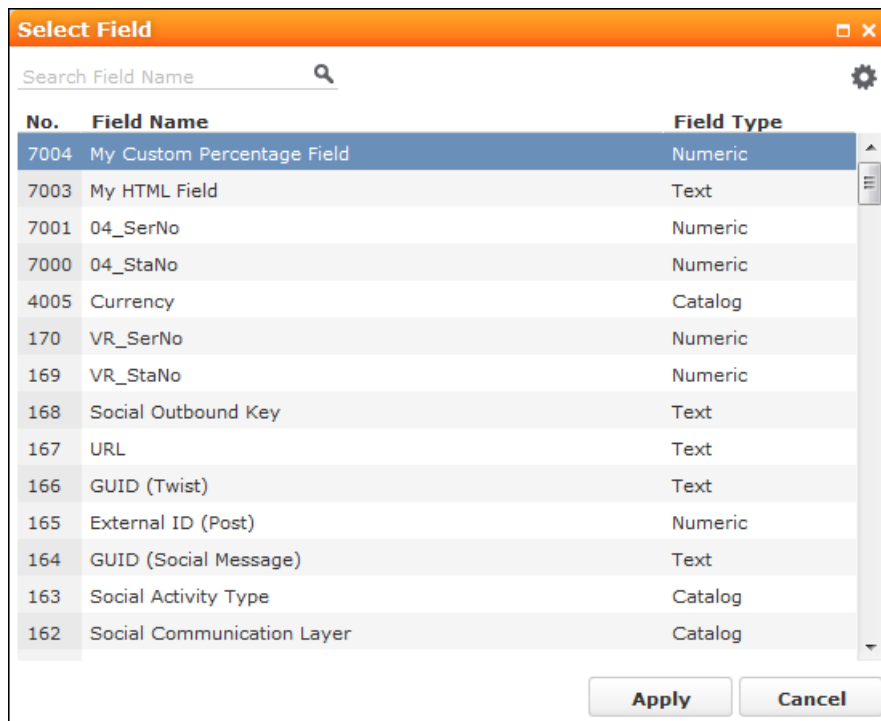
7. Enter can add further fields to this dialog, >> [Adding Fields](#) on page 188. Click on **X (Remove Field)** to remove a field from the dialog.
8. If you enter a new value to be entered in the field, the check box to the left of the field is enabled automatically.
9. Enable the check box without entering a value for the field to remove existing values in that field.
10. Click on **Start Mass Update**.  
You will be asked to confirm the changes.
11. Confirm the prompt to apply the changes to all records meeting your search criteria.


## Adding Fields

To add fields to the **Mass Data Update | Fields to be Changed** dialog:

1. Click on **+** (**Add fields**).
- All fields in the info area are listed in the **Select Field** dialog.







2. Restrict the list of fields by entering the field name (or a portion thereof) in the search field.
3. Click on  (**Show/Hide Columns**) to determine which columns are displayed in the list.
4. Click on a column header to sort the list by the entries in that column.
5. Click on **Apply** to add the field to the **Mass Data Updates | Fields to be Changed** dialog.

## Mass Deletions

To carry out a mass deletion:

1. Select **Settings** () > **Maintenance** > **Mass Data Operations** .
2. Select the info area, define your search criteria or a filter and verify that you want to delete the records in the list, >> [Mass Data Updates](#) on page 187.
3. Click on  (**Delete**). You will be prompted to confirm the deletion and the number of affected records is displayed.

Confirm the prompt to delete all records in the results list.

## Importing Data

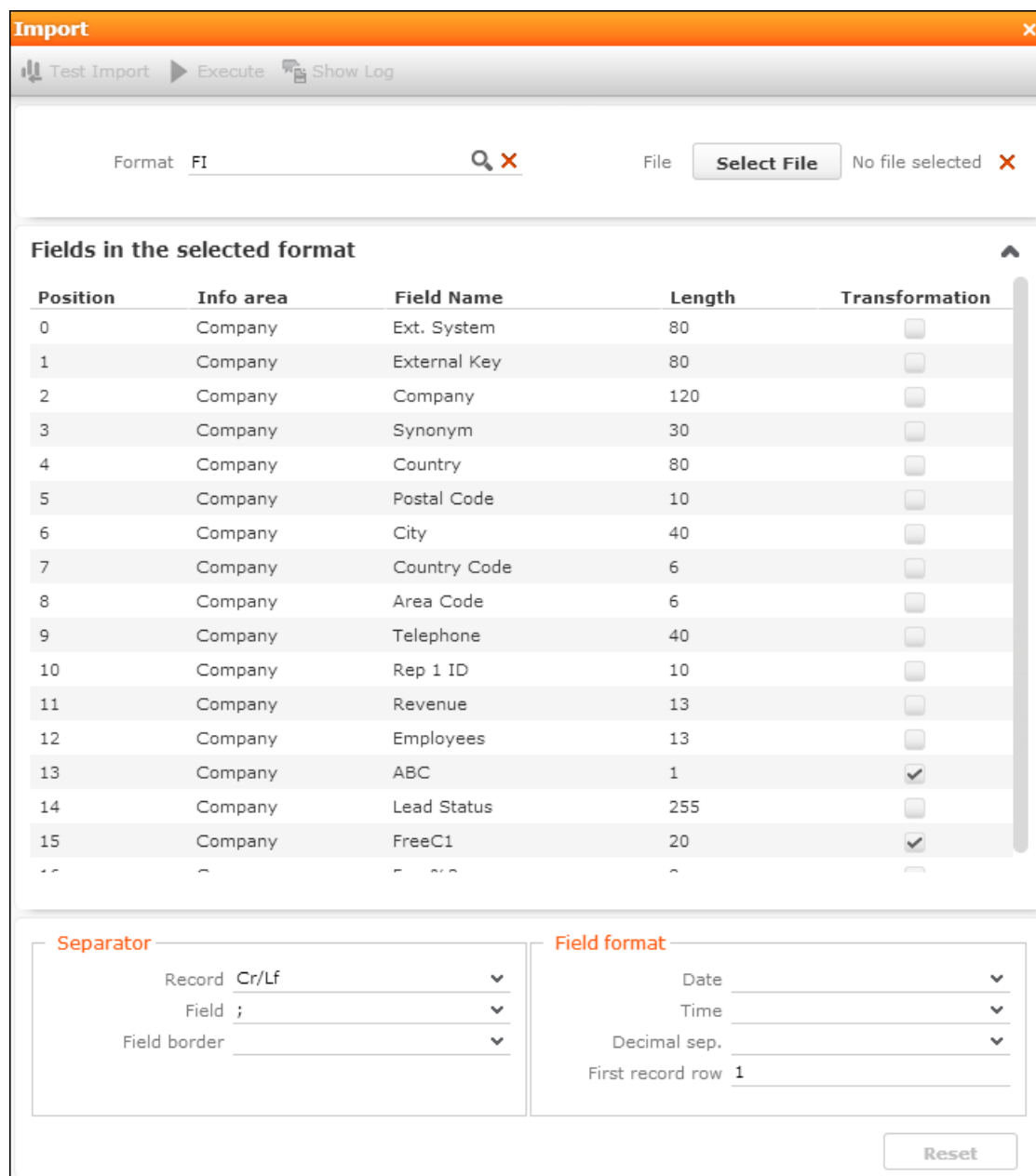
You can import data, e.g. from an CSV file.

To import data:

1. Select **Settings** (  ) > **Maintenance** > **Import** .


**Note:** Your administrator can also define buttons available in info areas that can be used to import data into just that info area.

The **Import** dialog opens.



**Import**

Test Import Execute Show Log

Format FI  X File **Select File** No file selected X

**Fields in the selected format**

Position	Info area	Field Name	Length	Transformation
0	Company	Ext. System	80	<input type="checkbox"/>
1	Company	External Key	80	<input type="checkbox"/>
2	Company	Company	120	<input type="checkbox"/>
3	Company	Synonym	30	<input type="checkbox"/>
4	Company	Country	80	<input type="checkbox"/>
5	Company	Postal Code	10	<input type="checkbox"/>
6	Company	City	40	<input type="checkbox"/>
7	Company	Country Code	6	<input type="checkbox"/>
8	Company	Area Code	6	<input type="checkbox"/>
9	Company	Telephone	40	<input type="checkbox"/>
10	Company	Rep 1 ID	10	<input type="checkbox"/>
11	Company	Revenue	13	<input type="checkbox"/>
12	Company	Employees	13	<input type="checkbox"/>
13	Company	ABC	1	<input checked="" type="checkbox"/>
14	Company	Lead Status	255	<input type="checkbox"/>
15	Company	FreeC1	20	<input checked="" type="checkbox"/>

**Separator**

Record Cr/Lf

Field ;

Field border

**Field format**

Date

Time

Decimal sep.

First record row 1

**Reset**

2. Select the desired import format from the **Format** field. The fields defined in the import format are displayed and provide you with information on how the import

---

file needs to be structured. The **Transformation** field indicates whether data in a selected field is transformed during the import process.

---

**Note:** Formats are defined by your administrator.

---

3. Click on **Browse** to select the file to import.

Click on **X (Remove File)** to clear the selected file.

4. Define the separators used in the import file under **Separators**.

- **Record:** The separator between records in the file. A record separator must be specified when using formats with variable field lengths; this is optional when using fixed field lengths.
- **Field :** The separator between fields in a record.
- **Field border :** The field border before and after a field (e.g. an apostrophe in DBase files).

The following options are available: " (quotes), , (comma), ; (semicolon), Blank (space); Cr (carriage return), Lf (line feed), Cr/Lf, Tab.

5. Define the formats used in the import file under **Field format:**

- **Date :** The format used by date fields. Default value: DD/MM/YYYY (day/month/year).
- **Time :** The format used by time fields. Default value: HH:MM (hours:minutes).
- **Decimal sep. :** The character used to separate decimal places. If no character is selected, decimal values are not imported correctly.
- **First record row:** The row in the file containing the first record to be imported.

6. Click on **Test Import**.

7. A preview of the import of the first 50 records based on your current settings is displayed. The **File values** column displays the values in the import file; the **Imported values** column displays the values as they will be imported into Aurea CRM web.

You can navigate through the individual records to verify that the import settings are correct. Data that cannot be imported is displayed in red.

You can display a tooltip containing the entire contents of a field if the field contents are too long to be displayed completely.

8. Click on **Execute** to import the data into the database.

---


**Note:** The import cannot be undone.

---

## Viewing the Import Log File

Whenever you import data, all changes are written to a log file.

To view this log file:

1. Click on  (**Show Log**) after importing the data.

The log record is displayed.

---

**Note:** You can also access the logs from the **Communication Log** option in the administration menu.

---

2. Select **Create Report** from the menu.

The contents of the log file is displayed in a new browser tab.

## Import Results

If errors occur during an import, import results records are added.

These errors are displayed under **Import Results** in the **Related Data** area and contain the row number and corresponding error message.

Select **Open Affected Record** from the context menu to switch to the import result record.

## Managing Checked Out Documents

You can list all documents that have been checked out and see who has checked out which document.

Select **Undo Check Out** to allow other users to work with a document, e.g. if a rep is sick and currently has checked out documents.

Select **Settings** () > **Maintenance** > **Checked Out Documents** to display a list of all checked out documents.


## Managing Reps

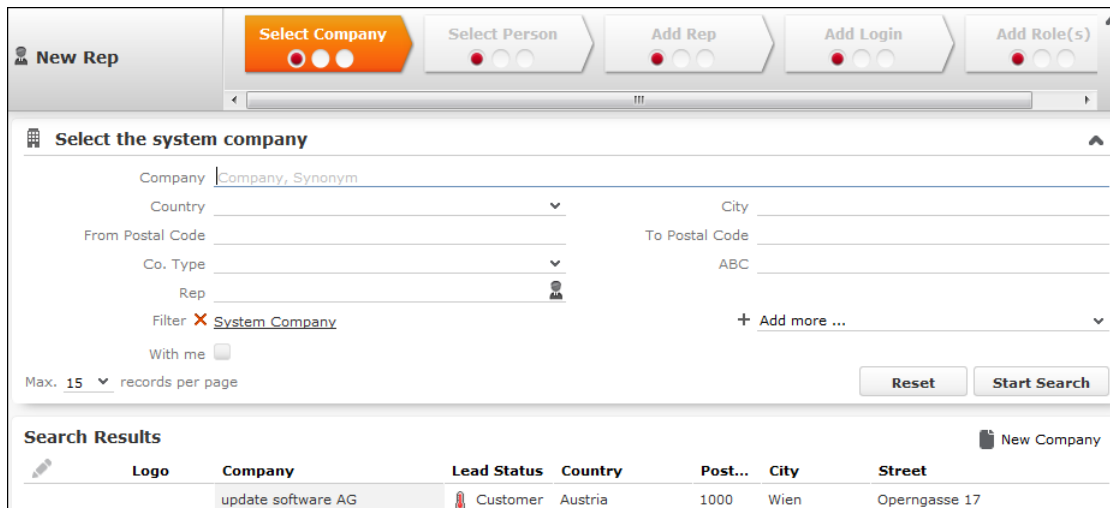
You can add new reps or edit existing reps' data, e.g. to define their signature or assign access rights.


## New Reps Process

A process is available to guide you through the steps required to add a new rep. Once a phase has been completed, the system automatically proceeds to the next phase.

To add a rep:

1. Select **Settings** () > **Maintenance** > **Reps** .
2. Click on **Start Search** in the search mask.
3. Click on **+** (**New Rep**) to add a new record and start the process.



Logo	Company	Lead Status	Country	Post...	City	Street
	update software AG	 Customer	Austria	1000	Wien	Operngasse 17

4. Select the rep's company or add a new one in the first phase.

By default, only companies flagged as system companies are displayed in the search results.

You can however remove the **System Company** filter and link the rep to another company.

5. Select the person corresponding to the rep in the **Select Person** phase.

A rep must be linked to a person. The search only lists those persons who have not been assigned a login.

6. The **Add Rep** phase is used to add the rep record. Data available in the person record selected in the previous step is entered automatically. You can also assign an organizational group and determines the rep's superior and deputy.
7. The **Add Login** phase allows you to assign a login name and password (mandatory) as well as module access rights.

The following are entered automatically:

- The **Name** is generated from the first four letters of both the first and last names of the selected person. This name needs to be unique.

---

**Note:** Login names can include letters, umlauts, 'ß' and '#', but no other special characters are allowed.


---

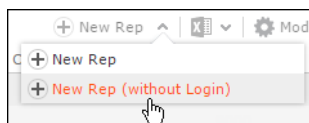
- The following module access rights are assigned automatically: web, groupware connector and Communication.
8. You can assign one or more roles to the rep in the **Add Role(s)** phase. Select the desired roles and click on **Assign Selected Roles** to assign the roles to the rep.
  9. After completing the final phase, the rep record is displayed.  
Verify the data in the tab view.

## Adding Reps, Rep Groups and Resources Manually

You can add a new rep without starting the new rep process.

To add a rep without a login:

1. Select **Settings** (  ) > **Maintenance** > **Reps** .
2. Click on **Start Search** in the search mask.
3. Click on **+ (New Rep (without Login))**.



Enter data such as the name, form of address etc.

4. To add a group or resource instead of a rep, select the desired entry from the **Type** drop-down list.
5. You can enter additional information on the following tabs:
  - **Rights** : The rep's organizational group, station number and station/group and rep access rights etc.
  - **Settings**: Settings such as the language, tenant, superior and deputy. You can also set the rep is **Inactive**.
  - **Working Hours**: The rep's work hours.

- **Contact Data:** The rep's contact data.
- **Connector settings:** Allows you enable the connector settings and define which data to synchronize.

## Central Login Configuration

Use the **Central Login Configuration** area to manage logins for offline stations centrally.

To define a central login:

1. Switch to the desired rep.
2. Switch to the **Central Login Configuration** tab under **Related Data**.
3. Click on **+** (**New**).
4. Define the following:
  - Enter the users login name, alias, station number etc. under **Overview**.
  - Define which Aurea CRM modules the rep can access under **Module Access Rights**.
  - Define the password under **Password Settings** tab, as well as how often the password needs to be changed etc.
  - Define whether the rep can log on to the system multiple times and whether system locks are ignored under **Lock**.

## Assigning Rep Roles

To assign a role to a rep:

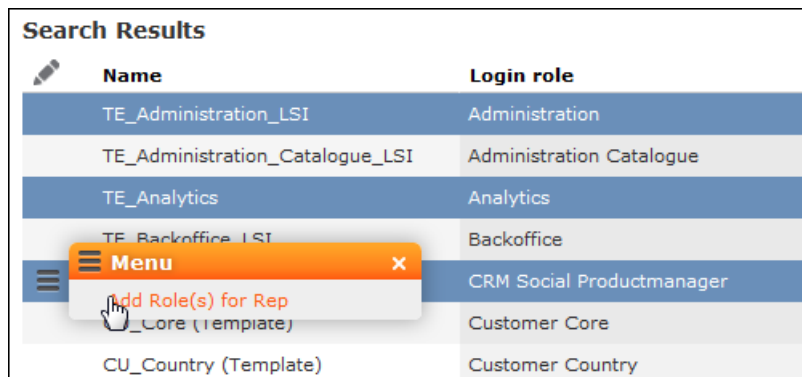
1. Switch to the desired rep.
2. Switch to the **Rep Role** tab under **Related Data**.
3. Click on **+** (**New**).
4. Click on **🔍** (**Select**) next to the **Login role** field to select the role. You can determine the following:
  - Whether the role is **Active** (i.e. can be selected when logging in)
  - Whether the role has **Read only** access
  - Whether the role is the rep's **Default** role. The default role is selected automatically when logging on.

## Assigning Multiple Rep Roles

You can assign multiple roles to a rep.

To assign multiple roles:

1. Switch to the desired rep.
2. Switch to the **Rep Role** tab under **Related Data**.
3. Click ⊕ (**Add Multiple Roles**).
4. You can enter a name and login role to restrict the search results.
5. Select the desired entries (Ctrl+Click).
6. Select **Add Role(s) for Rep** from the context menu.



Name	Login role
TE_Administration_LSI	Administration
TE_Administration_Catalogue_LSI	Administration Catalogue
TE_Analytics	Analytics
TE_Backoffice_LSI	Backoffice
TE_Core (Template)	CRM Social Productmanager
CU_Country (Template)	Customer Core
	Customer Country

## Defining Skills

You can skills for each rep. When assigning tickets to reps, for example, you can take into account the skills of your reps.

To assign skills:

1. Switch to the desired rep.
2. Switch to the **Skills** tab under **Related Data**.
3. Click on ⊕ (**New**).
4. Define the skill:

You can enter the following information:

- **Product/Product Group**, e.g. for service technicians qualified to handle certain types of machinery.
- **Language**, e.g. for international corporations.
- **Sector**, e.g. for reps with detailed knowledge of a particular industry.
- **Problem/Problem Group**, e.g. if a rep is experienced in solving particular problems.



---


## Assigning Groups

You can assign reps to groups. To do so:

1. Switch to the desired rep.
2. Switch to the **Group Allocation** tab under **Related Data**.
3. Click on **+** (**New**).
4. Select your group. You can also define a time period for the group membership.

## Template Configuration Table

The contents of the template configuration table is used in various info areas. This area allows you to define templates for e-mails sent out automatically within the scope of complaint management.

Select **Settings** () > **Maintenance** > **Template Configuration Table** to access the template configuration table.

---

**Note:** Verify the contents of this table carefully and customize the entries to the needs of your company.


---

## Editing To-Dos

To-Dos are added by the system by a number of functions, and are used to initiate further processes.

**Example:** When adding a marketing activity, you can define that a target group should be generated. This generally takes place at a predefined time in the night (as the process can be resource-intensive). The process of generating the target group is initiated using a To-Do.

To check the data in a To-Do:

1. Select **Settings** () > **Maintenance** > **To Do** .
2. Search for the desired To-Do and, if required, edit it.

## Variables

You can define variables and values that change according to the current rep's data (e.g. country, tenant etc.).

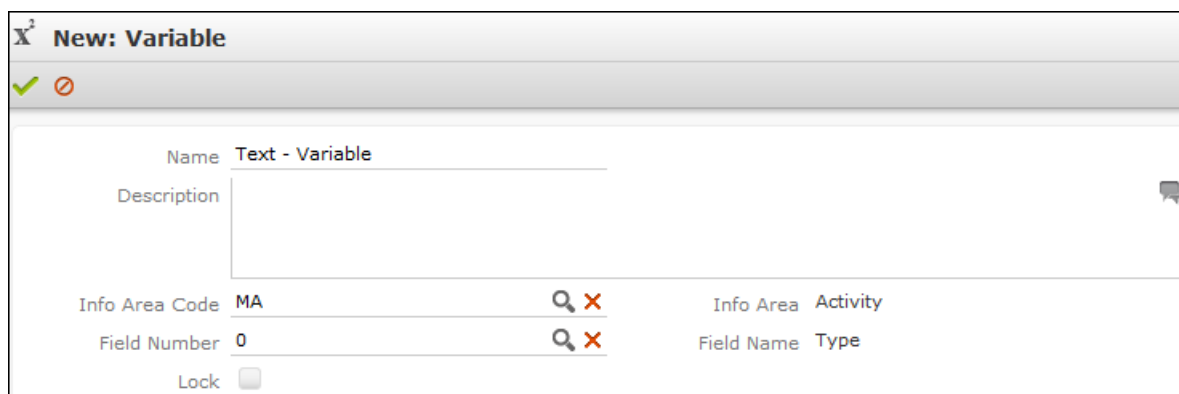
These variables can be used in various areas in Aurea CRM, such as workflows, triggers and reports. For example, a trigger can be used to display yearly revenue figures for the current rep's country or enter a variable value in a specific field.

For more information, >> *CRM.core Administrator Guide* and the *Aurea CRM web Administrator Guide*.

## Defining Variables

To add a new variable:

1. Select **Settings** () > **Maintenance** > **Variables** .
2. Start the search and click on **+** (**New**) in the search results' header.



3. Enter a unique **Name** and a **Description** of the variable.
4. To choose the variable's data type, select a field of the same type in the **Info Area Code** and **Field Number** fields.
5. Enable the **Lock** check box to lock the variable and prevent it from being used.
6. Save the record.

## Defining Values for Variables

You can define any number of variable values based on a combination of criteria applied to the current rep or station.

Example: Your company has regional offices in several countries. Whenever new records are added, the currency fields should contain "USD" for employees in the US, "EUR" for employees in the eurozone and "SFR" for employees in Switzerland.

To add suitable variable values:

1. Switch to the desired variable and click on **+** (**New**) on the **Variable Value** tab.

**New: Variable Value**

Info Area Activity

Stat. No. \_\_\_\_\_

Z6\_TenNo \_\_\_\_\_

Rep Group ID \_\_\_\_\_

Language No. \_\_\_\_\_

Country \_\_\_\_\_

Default

Field Name Subject

Station \_\_\_\_\_

Tenant Name \_\_\_\_\_

Rep ID \_\_\_\_\_

Language \_\_\_\_\_

Login role \_\_\_\_\_

**Variable Value**

Catalog Text \_\_\_\_\_

Var. Date \_\_\_\_\_

Var. Decimal \_\_\_\_\_

Var. Number \_\_\_\_\_

Var. Text \_\_\_\_\_

Var. Rep ID \_\_\_\_\_

Var. Time (s) \_\_\_\_\_

Var. Logical

- Use the top section to define the criteria that need to be met in order for the value to be applied.

**Note:** The upper section is fixed, the lower **Variable Value** section depends on the selected field type (determined when saving).

In order for a variable to be available to a rep, the criteria must either be empty or match the following values entered in the rep record, e.g. the same organizational group or the same current login role.

If more than one variable value is applicable for a rep, the value with the most matching criteria is used. If the same number of criteria match in multiple values, or if no suitable value is found, the value is used where the **Default** check box is enabled.

- Enter the variable value in the lower section.
  - For numeric, date, time, rep and Boolean fields:

**Variable Value**

Catalog Text \_\_\_\_\_

Var. Date \_\_\_\_\_

Var. Decimal \_\_\_\_\_

Var. Number 123

Var. Text \_\_\_\_\_

Var. Rep ID \_\_\_\_\_

Var. Time (s) \_\_\_\_\_

Var. Logical

Enter the value in the appropriate field for the selected field type (**Info Area Code** and **Field Number** selected in the parent variable). Values entered in other fields are not saved.

- For variable catalogs:

In order to display the input mask for variable catalogs, you first need to save the variable value.

The screenshot shows a form with a 'Variable Value' input field. Below it, there are two labels: '1st Par.Cat.Text' and 'Parent Catalog'. Under '1st Par.Cat.Text', the value 'Catalog Text United Kingdom (BASE)' is displayed. Under 'Parent Catalog', there is a search icon, a red 'X' icon, and the text 'Var. Number/Catal... 2'.

Click on **q** (**Select**) to select the desired value.

- For fixed catalogs:

In order to display the input mask for fixed catalogs, you first need to save the variable value.

The screenshot shows a form with a 'Variable Value' input field. Below it, there are two labels: 'Index of Catalog V...' and 'Catalog Value Telephone'. The 'Index of Catalog V...' field is highlighted with a red box.

Enter the index number of the catalog value here. The **Catalog Value** is entered automatically once the variable value has been saved.

4. Save the record.

## Texts in the Text Info Area

You can add and edit texts stored in the **Text** info area in Aurea CRM web (e.g. to add a new translation for an existing text).

---

**Note:** You can only edit texts that are stored in the **Text** info area. Other texts not defined in the **Text** info area (e.g. defined in CRM.designer) are unaffected.

---

Whether you can add new texts or translations depends on your access rights.


The texts in the **Text** info area can be entered as links in info areas (which requires the data model to be customized) or entered automatically into generated e-mails using a trigger.

The same text can be referenced by multiple areas.

For more information on texts, >> Text Info Area in the *CRM.core Administrator Guide*.

## Adding New Translations for Existing Texts

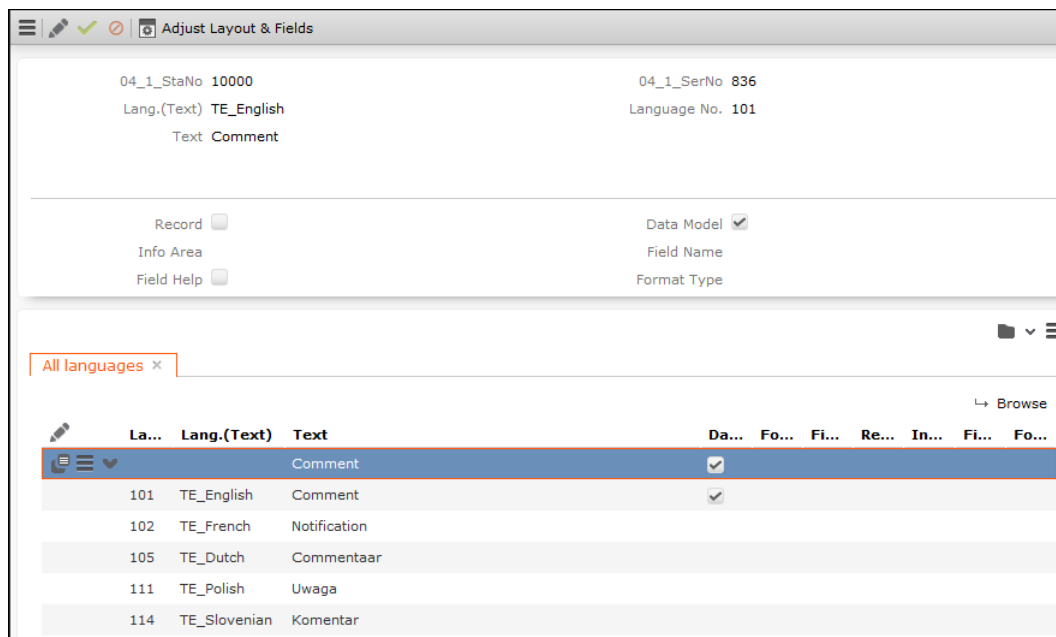
To add a new text:

1. Select **Settings** () > **Maintenance** > **Texts** .
2. Enter search criteria to restrict the number of hits and click on **Start Search**.
3. Double-click on the desired entry in the results list.

The text record is opened. The list at the bottom indicates where the text is used:

- **Data Model, Field Help, Record:** A tick indicates that the text is used by one of these areas.
- **Info Area, Field Name:** If the text is used in an info area, the info area and field names are displayed. If the same text is reused, only the first hit is used; if the same text is used by multiple info areas and fields, only one info area and field is listed.
- **Format Type:** If the text is referenced by a format, the format type is displayed. If the same text is referenced by multiple formats, only one format type is listed.

Translations are listed in the area below on the **All Languages** tab.




The screenshot shows the 'Adjust Layout & Fields' window. At the top, it displays record details: '04\_1\_StaNo 10000', '04\_1\_SerNo 836', 'Lang.(Text) TE\_English', and 'Language No. 101'. Below this, there are checkboxes for 'Record', 'Info Area', 'Field Help', 'Data Model', 'Field Name', and 'Format Type'. The 'Data Model' checkbox is checked. Below the checkboxes is a tab labeled 'All languages' with a close button. A table of translations is displayed below the tab, with columns for 'La...', 'Lang.(Text)', 'Text', and 'Da...'. The table contains the following data:

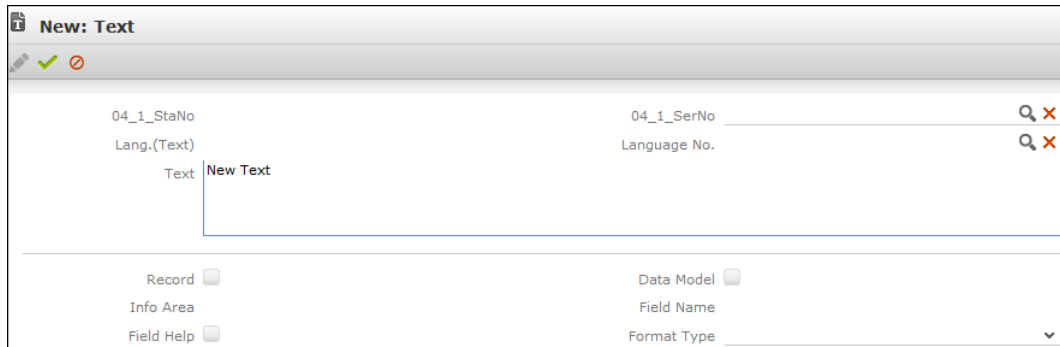
La...	Lang.(Text)	Text	Da...	Fo...	Fi...	Re...	In...	Fi...	Fo...
		Comment		<input checked="" type="checkbox"/>					
101	TE_English	Comment		<input checked="" type="checkbox"/>					
102	TE_French	Notification							
105	TE_Dutch	Commentaar							
111	TE_Polish	Uwaga							
114	TE_Slovenian	Komentar							

4. You can:
  - Double-click on an existing text (translation) to edit the text.
  - Select **New Text in Other Language** from the context menu to add a new translation or click on **(New)** in the header, >> [Adding New Texts](#) on page 202.

## Adding New Texts

To add a new text:

1. Select **Settings** () > **Maintenance** > **Texts** .
2. Click on **Start Search** in the search mask.
3. Click on **+** (**New**).



The text and its translation's unique key consists of the **04\_1\_StaNo** and **04\_1\_SerNo** fields. Each translation is stored as a separate record with the same key but a different language number.

**Note:** Do not enter the **04\_1\_StaNo** and **04\_1\_SerNo** when adding a new text; the key is assigned automatically. The key is entered automatically when adding a translation in a different language. Do not change these keys, as they uniquely identify the text and are used by other elements to reference the texts.

4. Enter the language number or click on **q** (**Select**) to select a language, and enter the desired text.
5. Save the record.

## Keyboard Shortcuts

The following default keyboard shortcuts are available in Aurea CRM web. Your administrator can define additional shortcuts or reassign the following standard shortcuts.

## Global Keyboard Shortcuts

Shortcut	Description
F1	Opens the online help.
Alt+Q	Moves to the next text field in the quick search.

## Search Area and Results Lists in Edit Mode

Shortcut	Description
Tab	Moves to the next editable field or the next action.
Shift+Tab	Moves to the previous editable field or previous action.
Alt+0	Activates the <b>Related Data</b> area.
Alt+<Number>	Displays the tab at the corresponding position, e.g. Alt+3 opens the third tab.  <b>Note:</b> You first need to activate the <b>Related Data</b> area with Alt+0.
Enter	Starts the search (provided the cursor is in the search area).
Alt+L	Activates the results list (the first record in the list is selected).

## Lists in View Mode

Shortcut	Description
Up cursor key	Selects the previous entry.
Down cursor key	Selects the next entry.
Page Up	Selects the first entry on the current page. If the first entry is already selected, the view switches to the previous page.

Page Down	Selects the last entry on the current page. If the last entry is already selected, the view switches to the next page.
Home	Switches to the first page.
End	Switches to the last page.
Space	Switches to edit mode.
Esc	Quits edit mode. Any changes are not saved and the previously saved data is restored.  If a drop-down list is open, use Esc to close it.

## Lists in Edit Mode

Shortcut	Description
Esc	Quits edit mode. Any changes are not saved and the previously saved data is restored.  If a drop-down list is open, use Esc to close it.
Right cursor key	Moves one character to the right within a field.
Left cursor key	Moves one character to the left within a field.
Tab	Moves to the next editable field.  If the current field is the last editable field in a row, the cursor moves to the first editable field in the next row. Changes to the current row are saved in the process.
Shift+Tab	Moves to the previous editable field.  If the current field is the first editable field in a row, the cursor moves to the last editable field in the previous row. Changes to the current row are saved in the process.
Up cursor key	Switches to the same field in the previous row. Changes to the current row are saved in the process.  <b>Note:</b> If the field is a drop-down list, use Ctrl+Up instead.



Down cursor key	Switches to the same field in the next row. Changes to the current row are saved in the process.
	<b>Note:</b> If the field is a drop-down list, use Ctrl+Up instead.
Ctrl+Alt+N	Adds a new record to the info area displayed in the list.

## MiniDetails

Shortcut	Description
+	Displays the mini details for the selected record in a list.
-	Closes the mini details for the selected record in a list.

## Tab View in Edit Mode

Shortcut	Description
Tab	Switches to the next field and saves all data entered in the current field.
Shift+Tab	Moves to the previous editable field or previous action.
Alt+0	Activates the <b>Related Data</b> area.
Alt+<Number>	Displays the tab at the corresponding position, e.g. Alt+3 opens the third tab.  <b>Note:</b> You first need to activate the <b>Related Data</b> area with Alt+0.
Ctrl+S	Saves the record.

## Catalog Fields in Edit Mode

Shortcut	Description
Down cursor key	Opens a closed drop-down list and displays the available values.
Alt+ or Esc	Closes an opened drop-down list and resets the value to the previous value.
Enter	Selects the currently highlighted value.
Up cursor key	Moves to the previous value in the drop-down list.
Down cursor key	Moves to the next value in the drop-down list.
Page Up	Moves up one page in an opened drop-down list.
Page Down	Moves down one page in an opened drop-down list.
Any letter	The first entry that begins with the letter is highlighted.

## Check Boxes / Radio Buttons in Edit Mode

Shortcut	Description
Space	Toggles the status of the check box/radio button.

## Popups

Shortcut	Description
Esc	Closes the popup.

---

## Calendar / Daily and Weekly Planning in Edit Mode

Shortcut	Description
Any letter	If a time period has been selected, a text field is displayed.
Enter	If you have entered text in a text field in the calendar, adds a new activity with the text as its subject.
Tab	Moves to the next entry if an entry is selected in the calendar.
Shift+Tab	Moves to the previous entry if an entry is selected in the calendar.
Del	Deletes the selected entry.

## Resource View / Visit Planning in Edit Mode

Shortcut	Description
Del	Deletes the selected entry.

# 2

## Master Data – FSI

Use the **Accounts** menu to manage customers (persons, companies, associations).

You can store customer data, such as their name, address, telephone number, number of employees and depict relationships between customers.

When accessing customer data, data is displayed in the tree view by default. Different data is displayed depending on the type of customer. For example, contact persons are displayed in the tree for companies.

### Persons

Private customers are stored as persons and you can depict these persons' relationships, e.g. association membership or where they are employed.




Select **(Accounts) > Persons** to search for persons.



Select **(Accounts) > Contact Persons** to search for **contact persons** entered for companies in the database, see [Adding Contact Persons](#) on page 224.

The screenshot displays the CRM interface for a user named Chris Aki. The top header shows the user's name, email (chrisaki@test.at), and account information (Sunny Sales (S...)). The main content area features three summary cards: Incidents... (0), Tasks open (0), and Matured P... (0). Below these is the profile overview for Chris Aki, including fields for Name (Ms. Chris Aki), Account (Sunny Sales (Sales User)), Date of Birth (22.10.1958), Nationality (Austrian), and Lead Status (Cold). The interface also includes a navigation menu on the left with categories like Activities, Interests, Documents, Tasks, Incidents, Product Overview, Contracts/Bundles, Product Roles, Transactions/Revenues, WPHG, and Complaints. At the bottom, there are tabs for Relationship Chart, Stake Structures, and Additional Addresses, along with a 'New Relationship' button and a 'Cross Links' checkbox.

---

**Note:** Depending on your configuration, the **Contact Person** at node may also be displayed (it is not displayed by default). Open a record under this node and click on  (**Go to Company/Association**) to switch the tree view to that record.

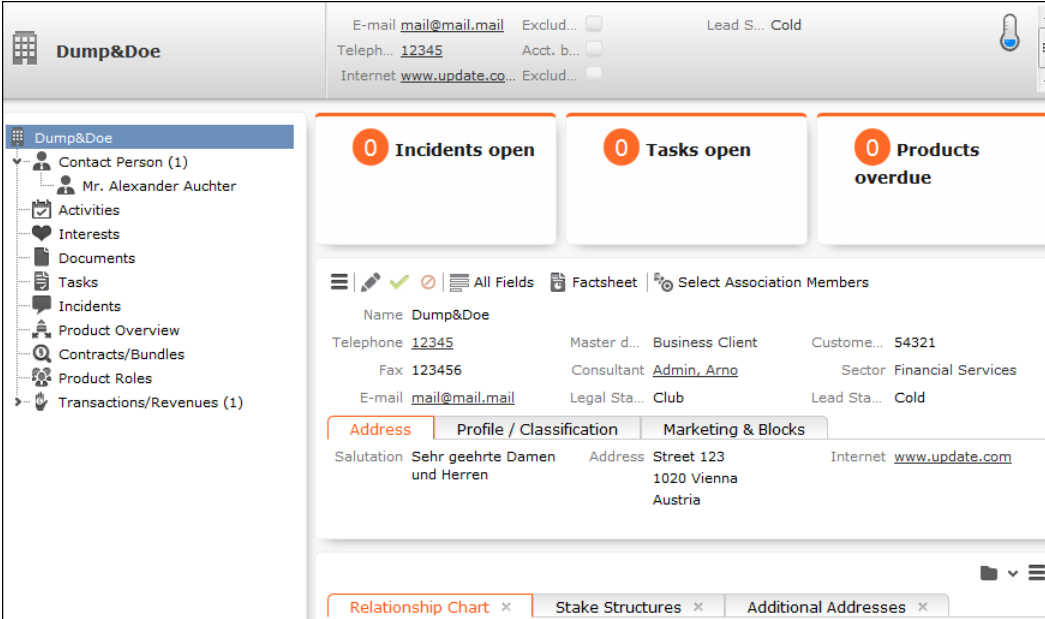
---

## Companies

You can store companies (business clients), including their relationships with other customers (e.g. employer, member of a corporate group).



Select  (**Accounts**) > **Business Clients/Associations** to search for companies.



The screenshot displays a software interface for a company record. On the left is a navigation tree with nodes: Dump&Doe, Contact Person (1), Mr. Alexander Auchter, Activities, Interests, Documents, Tasks, Incidents, Product Overview, Contracts/Bundles, Product Roles, and Transactions/Revenues (1). The main area shows contact details for 'Dump&Doe': E-mail mail@mail.mail, Telephone 12345, Internet www.update.co..., and Lead Status Cold. Three summary cards show '0 Incidents open', '0 Tasks open', and '0 Products overdue'. Below these are tabs for 'Address', 'Profile / Classification', and 'Marketing & Blocks'. The 'Address' tab shows: Salutation Sehr geehrte Damen und Herren, Address Street 123, 1020 Vienna, Austria, and Internet www.update.com. At the bottom are tabs for 'Relationship Chart', 'Stake Structures', and 'Additional Addresses'.


## Adding Contact Persons

When adding a contact person at a company, enter their contact data at the company (e.g. their corporate e-mail address and telephone extension). When adding persons, enter their private contact details (e.g. private e-mail address), see [Persons](#) on page 221.

To add a contact person at a company:

1. Open the desired company.
2. Switch to the **Contact Person** node in the company tree.
3. Click on **+** (**New**) in the results list.
4. Choose the desired option:
  - **Link to existing person record:** Link the contact person with a person already in the database.
  - **Create new person record:** Add a new person record for the contact person. In this case you need to enter and save the person's private details.

5. Enter the contact details for the person at the company (e.g. **Position** and **E-mail**).
6. Save the record.

**Note:** A relationship is added between the company and person ("Employer") and a reciprocal relationship is added between the person and the company ("Employee"), >> [Relationships](#) on page 226. Click on  (**Go to Private Person**) to switch to the person record associated with the contact person. If your system is configured accordingly, you can also add contact person records from the person tree (**Contact Person at** node).

## Associations

You can add associations to group related customers. The following types exist:

- Private association: Families, households etc.
- Business association: Corporate groups etc.
- Mixed association: Lobbies, foundations etc.




Select  (**Accounts**) > **Business Clients/Associations** to search for associations.

---


## Adding Master Data

To add new customers:



1. Select  (**Accounts**) > **New Master Data**.
2. Select the type of record (person, business client, private association, business association, mixed association).
3. Enter the data.
4. Save the record.

---

**Note:** You can click on  (**New**) in the search (e.g. the person search) to add new records.

---

## Relationships

**Relationships** are used to depict hierarchies and networks between companies, associations and persons. You can store relationship in Aurea CRM web (e.g. dependents, association members, business partners, suppliers) allowing you to depict hierarchies and networks.

You can also store information on **stakes** in companies. A stake is a type of relationship.


---

**Note:** If you add a contact person to a company, a relationship of the type "Employer" is added from the company to the person and a reciprocal relationship of the type "Employee" is added between the person and the company.

---

## Adding Relationships

To add a new relationship:

1. Switch to the desired customer (person, contact person, company, association).
2. Switch to the **Relationship Chart** tab.
3. Click on  (**New Relationship**).
4. Select whether you want to create a relationship with a person or business client/association..

The search is opened.

---

**Note:** You can also select a record from your favorites or recently viewed customers.

---

5. Double-click on the desired record in the search results to add the relationship.
6. Determine whether a reciprocal relationship should be added.

The **Do you want to create a reciprocal relationship?** check box is enabled by default. For example, if you select the relationship "Employee", the reciprocal relationship is "Employer".

7. You can enter search criteria under **Relationship level**.



8. Double-click on a relationship to select it. The relationship is added and the relationship chart is displayed, see [Relationship Chart and Stake Structures](#) on page 229.

### Adding Stakes

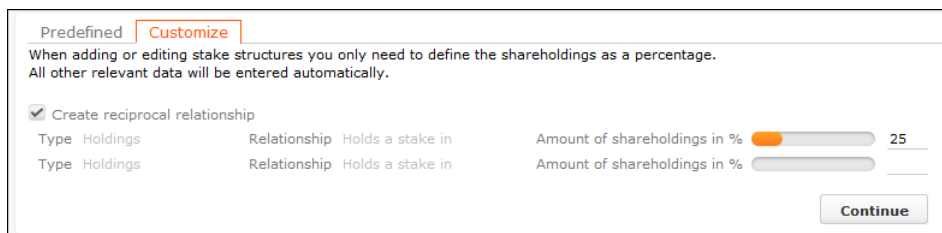
A stake is a type of relationship.

To add information on a stake held by a customer:

1. Switch to the desired customer (person, contact person, company, association).
2. Switch to the **Stake Structures** tab.
3. Click on **+** (**New Stake Structure**)
4. Choose the type of customer the stake is held in. The search is opened.

**Note:** You can also select a record from your favorites.

5. Double-click on the customer in the list of results you want to enter the ownership information for.



6. Enter the stake as a percentage. Enter the stake held by the source customer in the target customer in the first row. Enter the stake held by the target customer in the source customer in the second row.

7. Click on **Continue**. The stakes are added.

Stakes can be displayed in a chart, see [Relationship Chart and Stake Structures](#) on page 229.

**Note:** This chart only displays information on the stakes held by the customer, not on stakes held in the customer by others.



---

## Displaying, Editing and Deleting Relationships and Stakes


You can display, edit and delete relationships and stakes.

You can edit relationships in the relationship network, see [Relationship Network](#) on page 230.


To edit a relationship:

1. Switch to the desired customer (person, contact person, company, association).
2. Switch to the **Relationship Chart** tab.
3. Click on the node in the graph corresponding to the record whose relationship you want to edit.
4. Move your cursor over a relationship in the list on the left.

The context menu and quick view icons are displayed:

- Select **Delete** from the desired relationship's context menu to delete it. Select  > **Refresh Working Area** to refresh the relationship chart.
- Select **Edit Relationship** from the desired relationship's context menu to edit the relationship.

To edit stakes:

1. Switch to the desired customer (person, contact person, company, association).
2. Switch to the **Stake Structures** tab.
3. Click on  (**Edit Stakes**).

All stakeholdings defined for the customer are displayed.

4. Edit the stake or select **Delete** from the context menu to delete it.

---

**Note:** If you edit a relationship or stake, the reciprocal relationship or stake is not updated automatically.

---

---

**Note:** If you delete a stake or relationship, you will be asked whether the reciprocal relationship should also be deleted.

---

### Relationship Chart and Stake Structures

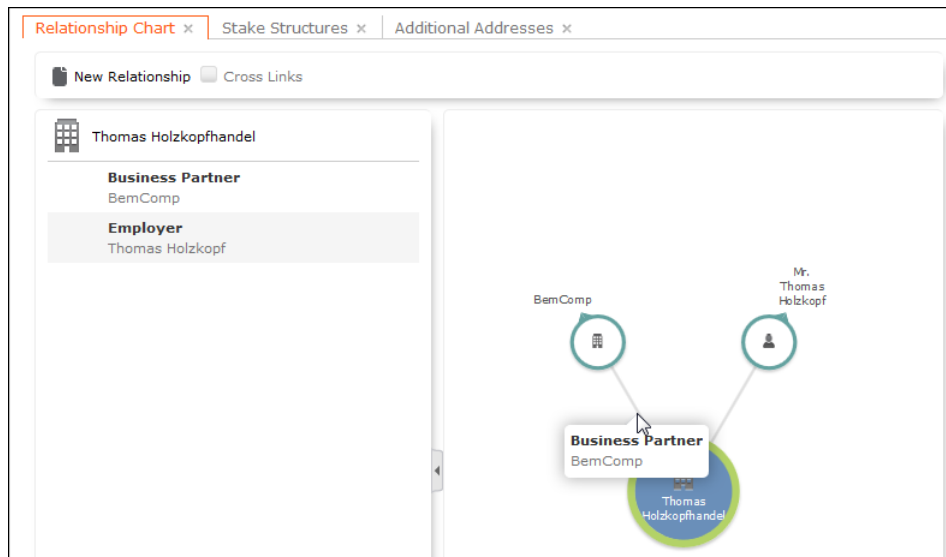
The relationship chart displays the relationship network for persons, companies and associations, see [Relationship Network](#) on page 230.

The **Stake Structures** tab displays ownership stakes held by the current customer.

To display the relationship chart or information on stakes:

1. Switch to the desired customer (person, contact person, company, association).
2. Switch to the **Relationship Chart** or **Stake Structures** tab. The chart is displayed.

- **Relationship Chart:**

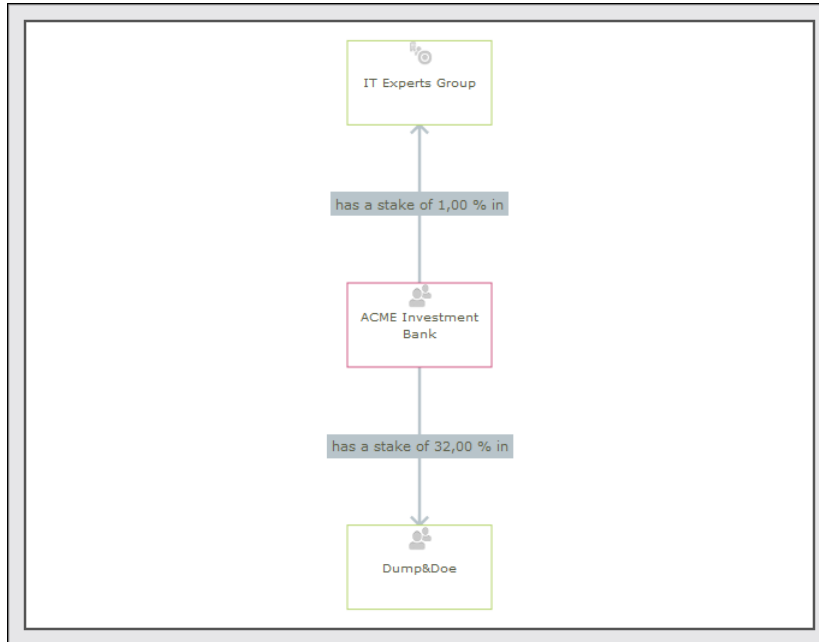


The current record is displayed in the center. All company and person records that are linked to the current record via a relationship are displayed surrounding the current record.

Click on **+** (**New Relationship**) to add a new relationship, see [Adding Relationships](#) on page 226.

The relationships stored for the currently selected record are displayed on the left. Select **Edit Relationship** from the context menu to edit the relationship.

- **Stake Structures:**



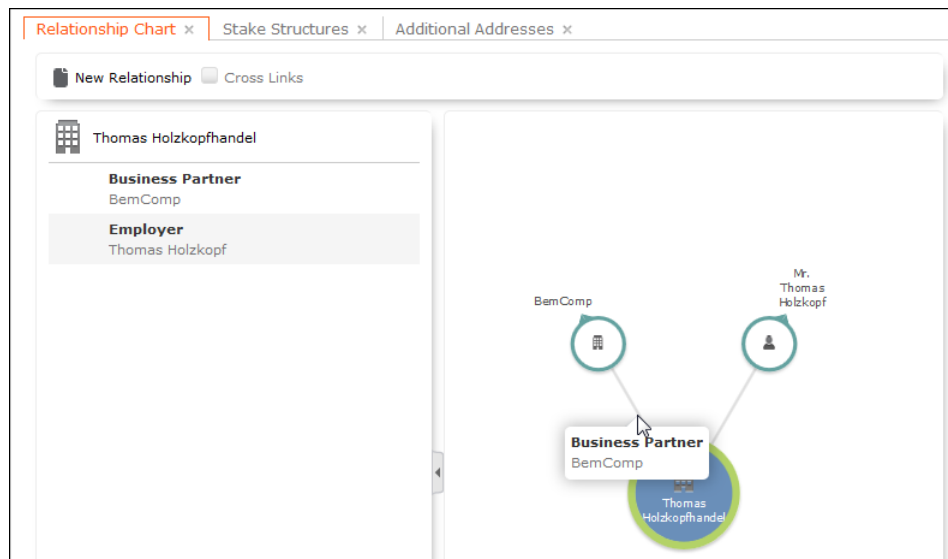
The current record is displayed in the center. The customers the current customer holds a stake in are displayed surrounding the current record. The ownership percentage is displayed over the connecting lines.



- You can drag customers (nodes) in the chart to a new position.
- Click on a customer to open the customer record.
- Hover the mouse cursor over a customer to display additional information on the customer (e.g. their ABC classification).
- Click on **+** (**New Stake**) to add a new record, see [Adding Stakes](#) on page 227.
- Click on **✎** (**Edit Stake Structures**) to edit existing records, see [Displaying, Editing and Deleting Relationships and Stakes](#) on page 228.

### **Relationship Network**



The relationship network displays all a company or person's relationships with other companies and persons.



Multiple levels can be displayed in the relationship network.



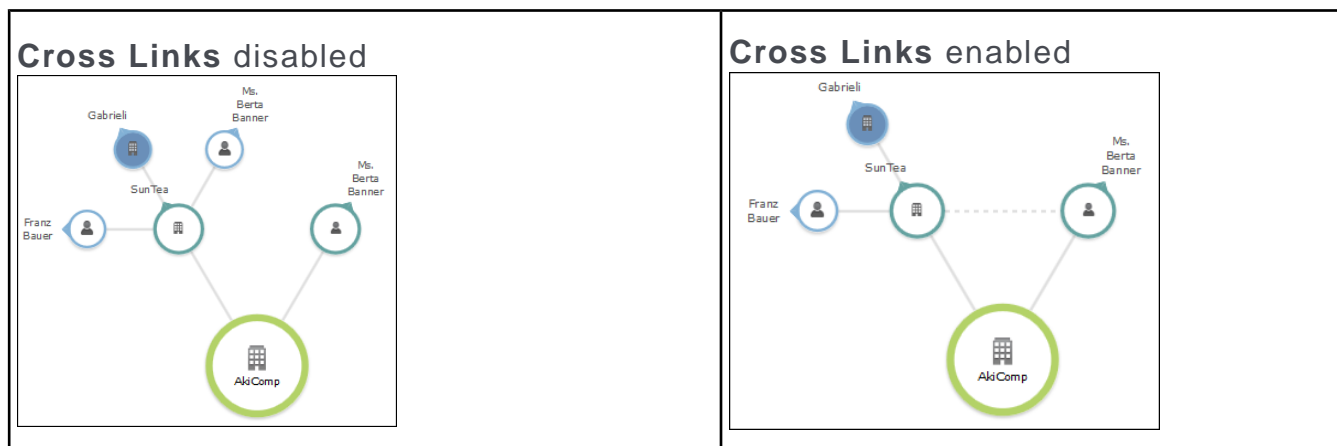
- The current record (company or person) is displayed at the center (large node with a green border). All records that are linked to the current record via a relationship are displayed surrounding the current record. Reciprocal relationships are not displayed.
- Move the mouse cursor over a connecting line to display the type of relationship.
- Click on  on the left to open the side bar containing a list of the relationships stored for the current record (note that any predefined filters are also applied to this list). Open the context menu for an entry in the list and select the person or company's name to display the company or person in the quick view. Click on  to close the side bar.
- Click on a node in the tree to select that company or person. The list of relationships on the left is updated to display the relationships defined for the selected company or person.
- Double-click on a node to open the corresponding record.
- Click again on a selected node to hide or display all relationships defined with that company or person. The nodes are color-coded according to their level in the network (i.e. how many degrees of separation lie between the node and the current record).
- Select a node and click on **+** **New Relationship** to add a new relationship for the selected company or person, see [Adding Relationships](#) on page 226.  
The relationship tree is refreshed once the relationship has been added.
- Click on a node and hold down the mouse button to open the company or person in the quick view. You can access the record's context menu from the quick view.
- Use your mouse wheel to zoom.

- You can scroll the view and reposition nodes in the network:

- Click anywhere in the network where the  mouse cursor is displayed to scroll in the network.
- Click on a node and then click on it again while holding down the mouse button (the mouse cursor is displayed as ) to move the node. Any child nodes are also moved.

- If the current record has relationships with more than 10 records (by default), the  and  nodes are displayed. Click on these nodes to display additional records that relationships have been defined with.
- Enable the **Cross Links** option to prevent the same record being displayed multiple times in multiple nodes (when more than one company or person is related to the same company/person). Each company/person is only displayed once and a dotted line indicates the additional relationships with a node.

**Example:** If a relationship is defined between a person and two companies, and a relationship has also been defined between these two companies, the person is displayed twice, once for the relationship with each company. If the **Cross Links** option is enabled, the person is only displayed once and a dotted line links the second company to the person.





## Defining Relationship Levels

The relationships that are available for selection are defined in the **Relationship Level** info area.

**Note:** You can only add records to the **Relationship Level** info area if you have the necessary access rights.

To add a relationship level record:

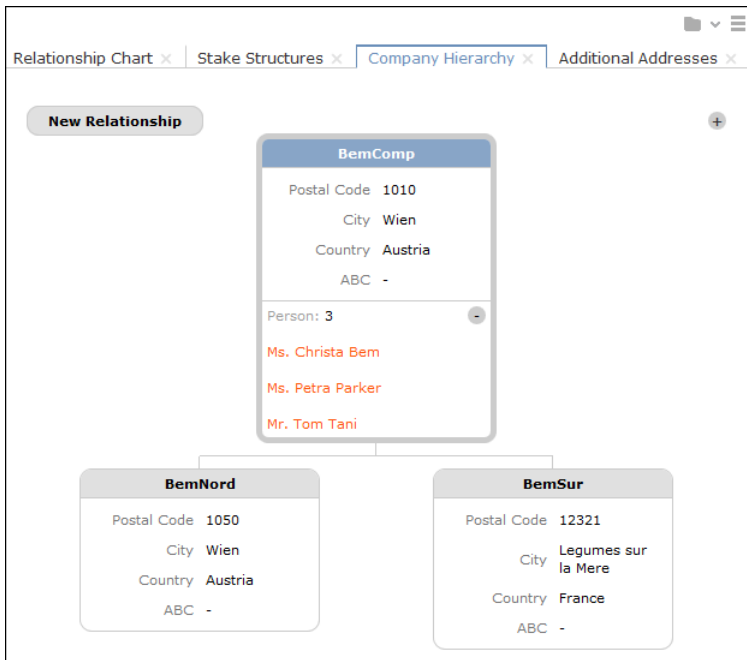
- Select  (**Settings**) > **Maintenance** > **Relationship level**.
- Click on **Start Search** and then on  (**New**).

3. Enter the **Relationship**, **Relationship type**, **Recip. Rel.** (reciprocal relationship) and **Recip. Rel. Type** (reciprocal relationship type).
4. Save the record. The defined relationship can then be selected when adding relationships.

### Company Hierarchy

The company hierarchy displays an overview of a company or association’s **corporate relationships** (parents, subsidiaries, holdings) with other companies/associations.

The **Company Hierarchy** tab is only available for companies/associations.



- Click on **+/-** to show/hide the contact persons at a company.
- Click on **New Relationship** to add a new relationship, see [Adding Relationships](#) on page 226.

You can only add relationships with business clients or associations, and the relationship type is always set to "Corporate Relationship".

- Click on the name of a company or person in the chart to open the company or person record.

### Affiliation View

By default, only data added for the current customer is displayed. The affiliation view allows you to display data concerning other customers that are affiliated with to the current customer. For example, you can display activities for both the current person and all related persons (e.g. household members) at once.



Click **Au** > **Affiliation View** to enable the association view globally (indicated by a tick in the check box). Aurea CRM web stores this setting between sessions.

### Example:

Activities displayed for a customer in the default view:

Starts on	Starts at	Subject	Status
07.02.2014	17:01	Check up	Planned

Activities displayed for a customer in the association view, including activities added for all association members.

Starts on	Starts at	Subject	Status
07.02.2014	17:01	Check up	Planned
07.02.2014	18:00	Sales tour	Planned

If configured accordingly, the affiliation view provides an overview of the customer records (e.g. the company (**Name** field) or person (**First Name** and **Last Name** fields) an activity belongs to).

The affiliation view is available in lists, queries and the tree view.

The affiliation view is available in the following areas: transactions, revenue, activities, interests, documents, product overview, incidents, contracts/bundles, product roles, contract/bundle roles, contact persons.

**Note:** Your administrator is responsible for defining whether you can access the affiliation view and which relationships can be taken into account.

The affiliation view only displays child data stored for records that are directly linked to the current record. Indirect relationships are not included. For example, the affiliation view can only include records added for immediate subsidiaries, but not records added for the immediate subsidiaries' subsidiaries.

If you define which other customers are included the affiliation view of a customer, these settings are visible to all users.

To determine which customers are displayed in the affiliation view:

1. Switch to the desired customer.
2. Click on  (**Select Affiliates**).

All customers where a relationship with the current customer has been defined are displayed graphically in a relationship network, see [Relationship Network](#) on page 230.

Move the mouse cursor over a connecting line to display the type of relationship.

3. Click on a node to select it and click on **Add to Affiliation** or **Remove from Affiliation** to define whether the corresponding record is an affiliate of the current customer.


You can select more than one node (Ctrl + Click).

Affiliates are highlighted in orange. Hover the mouse cursor over a node to display whether that company or person is defined as an affiliate.

4. Click on **Close** to close the view.

Select **Close & Refresh** to close the view and refresh the display to include data stored for the selected affiliates.

---


**Note:** When defining a query, you can enable the **Include Associations** option to include records stored for association members in the results. If the status of the check box is , records stored for association members are included in the results if the **Association View** check box is enabled in the main menu.

---

### Additional Addresses

You can add additional addresses for customer, e.g. the customer's second home.

To add an additional address:

1. Switch to the desired customer (company, person, contact person on the **Contact Person** node in the company tree).
2. Click on  (**New**) on the **Additional Addresses** tab.
3. Select the additional address's **Address Type**.

---

**Note:** You can only add one additional address per account and **Address type**.

---


4. Enter the address and additional contact information.
5. Save the record.

### Interests

You can store information on a customer's interests (e.g. hobbies or whether they wish to receive certain newsletters). Interests may also be useful when meeting a business partner, in order to strike up a conversation.

Which interests are available is defined by your administrator.

To assign interests:

1. Switch to the desired customer.
2. Click on **Interests** in the tree.
3. Click on  (**Manage Interests**) in the results list. A dialog opens.



♥ **Interests for Chris Aki**

✓

**Culture**

Art       Film       Opera       Theater

---

**Information**

Annual Report     Event       Newsletter     Press Releases     X-Mas Greetings

---

**Sport**


Football       Golf       Riding

4. Enable the corresponding check boxes to assign interests to the customer.
5. Save the record.

## Fact Sheet

The fact sheet contains an overview of the information stored for a customer and is suitable for printing.

To generate the fact sheet:

1. Switch to the desired customer.
2. Click on  (**Fact Sheet**) in the header. The fact sheet is generated.

---

**Note:** Your browser's popup blocker may prevent the fact sheet from being displayed.

---

3. Click on  to print the fact sheet.

## Persons


Private customers are stored as persons and you can depict these persons' relationships, e.g. association membership or where they are employed.



Select  (**Accounts**) > **Persons** to search for persons.



Select  (**Accounts**) > **Contact Persons** to search for **contact persons** entered for companies in the database, see [Adding Contact Persons](#) on page 224.

**Note:** Depending on your configuration, the **Contact Person** at node may also be displayed (it is not displayed by default). Open a record under this node and click on  (**Go to Company/Association**) to switch the tree view to that record.

## Companies

You can store companies (business clients), including their relationships with other customers (e.g. employer, member of a corporate group).

Select  (**Accounts**) > **Business Clients/Associations** to search for companies.

The screenshot shows a CRM interface for a company named "Dump&Doe". At the top, there are contact details: E-mail [mail@mail.mail](mailto:mail@mail.mail), Telephone... [12345](tel:12345), and Internet [www.update.co...](http://www.update.co...). Below this, there are three summary cards: "0 Incidents open", "0 Tasks open", and "0 Products overdue". The main content area displays the company's details, including Name "Dump&Doe", Telephone "12345", Fax "123456", E-mail "mail@mail.mail", and Address "Sehr geehrte Damen und Herren, Street 123, 1020 Vienna, Austria". There are also tabs for "Address", "Profile / Classification", and "Marketing & Blocks". At the bottom, there are tabs for "Relationship Chart", "Stake Structures", and "Additional Addresses".

## Adding Contact Persons

When adding a contact person at a company, enter their contact data at the company (e.g. their corporate e-mail address and telephone extension). When adding persons, enter their private contact details (e.g. private e-mail address), see [Persons](#) on page 221.

To add a contact person at a company:

1. Open the desired company.
2. Switch to the **Contact Person** node in the company tree.
3. Click on **+** (**New**) in the results list.
4. Choose the desired option:
  - **Link to existing person record:** Link the contact person with a person already in the database.
  - **Create new person record:** Add a new person record for the contact person. In this case you need to enter and save the person's private details.
5. Enter the contact details for the person at the company (e.g. **Position** and **E-mail**).
6. Save the record.

**Note:** A relationship is added between the company and person ("Employer") and a reciprocal relationship is added between the person and the company ("Employee"), >> [Relationships](#) on page 226. Click on **Go to Private Person** to switch to the person record associated with the contact person. If your system is configure

accordingly, you can also add contact person records from the person tree (**Contact Person at node**).

---


## Adding Contact Persons

When adding a contact person at a company, enter their contact data at the company (e.g. their corporate e-mail address and telephone extension). When adding persons, enter their private contact details (e.g. private e-mail address), >> [Persons](#) on page 221.

To add a contact person at a company:

1. Open the desired company.
2. Switch to the **Contact Person** node in the company tree.
3. Click on ⊕ (**New**) in the results list.
4. Choose the desired option:
  - **Link to existing person record:** Link the contact person with a person already in the database.
  - **Create new person record:** Add a new person record for the contact person. In this case you need to enter and save the person's private details.
5. Enter the contact details for the person at the company (e.g. **Position** and **E-mail**).
6. Save the record.

---

**Note:** A relationship is added between the company and person ("Employer") and a reciprocal relationship is added between the person and the company ("Employee"), >> [Relationships](#) on page 226. Click on  (**Go to Private Person**) to switch to the person record associated with the contact person. If your system is configured accordingly, you can also add contact person records from the person tree (**Contact Person at node**).

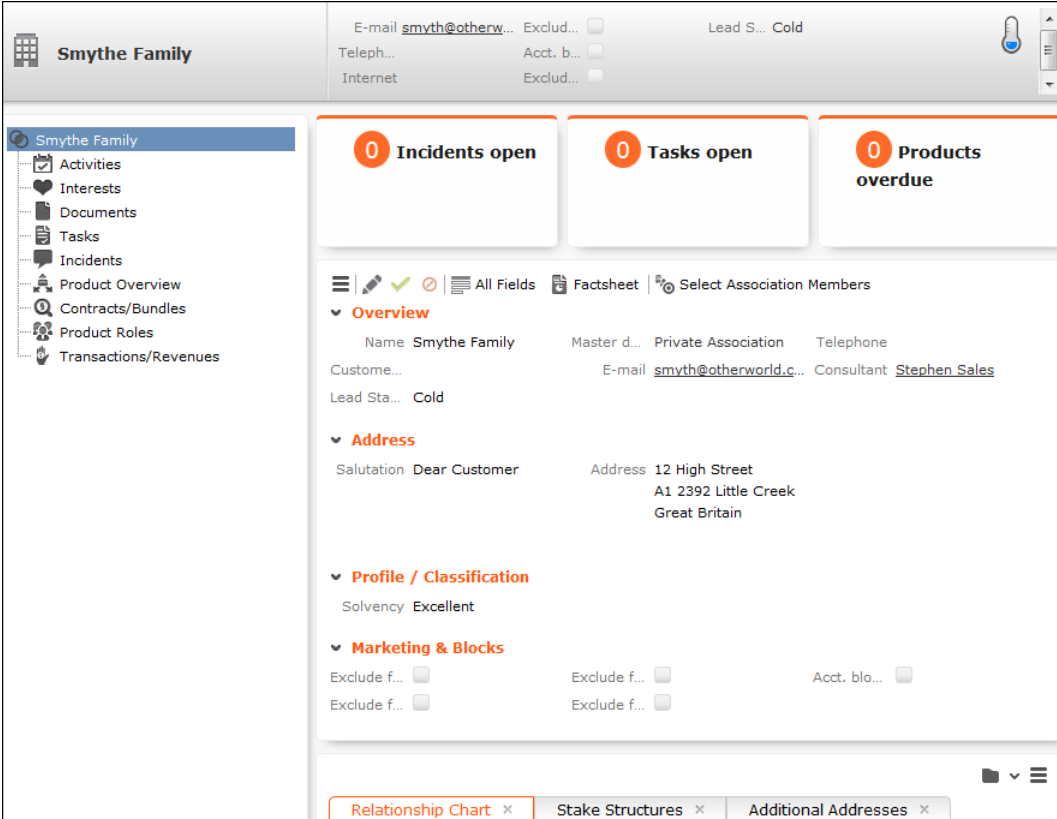
---

## Associations

You can add associations to group related customers. The following types exist:


- Private association: Families, households etc.
- Business association: Corporate groups etc.
- Mixed association: Lobbies, foundations etc.


Select  (**Accounts**) > **Business Clients/Associations** to search for associations.



## Adding Master Data

To add new customers:

1. Select  (**Accounts**) > **New Master Data**.
2. Select the type of record (person, business client, private association, business association, mixed association).
3. Enter the data.
4. Save the record.

**Note:** You can click on  (**New**) in the search (e.g. the person search) to add new records.

## Relationships

**Relationships** are used to depict hierarchies and networks between companies, associations and persons. You can store relationship in Aurea CRM web (e.g. dependents, association members, business partners, suppliers) allowing you to depict hierarchies and networks.

You can also store information on **stakes** in companies. A stake is a type of relationship.

---

**Note:** If you add a contact person to a company, a relationship of the type "Employer" is added from the company to the person and a reciprocal relationship of the type "Employee" is added between the person and the company.

---

## Adding Relationships

To add a new relationship:

1. Switch to the desired customer (person, contact person, company, association).
2. Switch to the **Relationship Chart** tab.
3. Click on **+** (**New Relationship**).
4. Select whether you want to create a relationship with a person or business client/association..

The search is opened.

---

**Note:** You can also select a record from your favorites or recently viewed customers.

---

5. Double-click on the desired record in the search results to add the relationship.
6. Determine whether a reciprocal relationship should be added.

The **Do you want to create a reciprocal relationship?** check box is enabled by default. For example, if you select the relationship "Employee", the reciprocal relationship is "Employer".

7. You can enter search criteria under **Relationship level**.

**New relationship starting from Smythe Family**

Predefined

Do you want to create a reciprocal relationship?

Relationship level ▼

Search Results << < 1 - 15 of 15+ > >>

Relationship type	Relationship	Recip. Rel. Type	Recip. Rel.
Private/business Relationship	Syndicate	Private/business Relationship	
Corporate Relationship	Syndicate	Corporate Relationship	Employer
Private/business Relationship	Spouse	Private/business Relationship	Spouse
Private/business Relationship	Society	Private/business Relationship	Associate
Private/business Relationship	Parent	Private/business Relationship	Child

8. Double-click on a relationship to select it.

The relationship is added and the relationship chart is displayed, >> [Relationship Chart and Stake Structures](#) on page 229.

## Adding Stakes

A stake is a type of relationship.

To add information on a stake held by a customer:

1. Switch to the desired customer (person, contact person, company, association).
2. Switch to the **Stake Structures** tab.
3. Click on **+** (**New Stake Structure**)
4. Choose the type of customer the stake is held in. The search is opened.

---

**Note:** You can also select a record from your favorites.

---

5. Double-click on the customer in the list of results you want to enter the ownership information for.

Predefined **Customize**

When adding or editing stake structures you only need to define the shareholdings as a percentage. All other relevant data will be entered automatically.

Create reciprocal relationship

Type	Holdings	Relationship	Hold a stake in	Amount of shareholdings in %	<input type="text" value="25"/>
Type	Holdings	Relationship	Hold a stake in	Amount of shareholdings in %	<input type="text" value=""/>

**Continue**

6. Enter the stake as a percentage. Enter the stake held by the source customer in the target customer in the first row. Enter the stake held by the target customer in the source customer in the second row.
7. Click on **Continue**. The stakes are added.

Stakes can be displayed in a chart, see [Relationship Chart and Stake Structures](#) on page 229.

---

**Note:** This chart only displays information on the stakes held by the customer, not on stakes held in the customer by others.

---

## Displaying, Editing and Deleting Relationships and Stakes


You can display, edit and delete relationships and stakes.

You can edit relationships in the relationship network, see [Relationship Network](#) on page 230.


To edit a relationship:

1. Switch to the desired customer (person, contact person, company, association).
2. Switch to the **Relationship Chart** tab.
3. Click on the node in the graph corresponding to the record whose relationship you want to edit.
4. Move your cursor over a relationship in the list on the left.

The context menu and quick view icons are displayed:

- Select **Delete** from the desired relationship's context menu to delete it. Select  > **Refresh Working Area** to refresh the relationship chart.
- Select **Edit Relationship** from the desired relationship's context menu to edit the relationship.

To edit stakes:

1. Switch to the desired customer (person, contact person, company, association).
2. Switch to the **Stake Structures** tab.
3. Click on  (**Edit Stakes**).

All stakeholdings defined for the customer are displayed.

4. Edit the stake or select **Delete** from the context menu to delete it.



**Note:** If you edit a relationship or stake, the reciprocal relationship or stake is not updated automatically.

**Note:** If you delete a stake or relationship, you will be asked whether the reciprocal relationship should also be deleted.

## Relationship Chart and Stake Structures

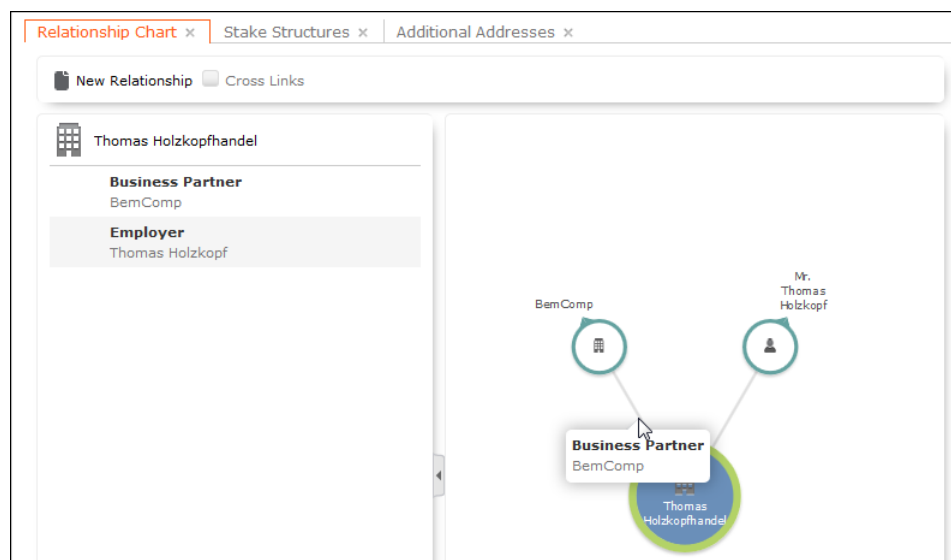
The relationship chart displays the relationship network for persons, companies and associations, >> [Relationship Network](#) on page 230.

The **Stake Structures** tab displays ownership stakes held by the current customer.

To display the relationship chart or information on stakes:

1. Switch to the desired customer (person, contact person, company, association).
2. Switch to the **Relationship Chart** or **Stake Structures** tab. The chart is displayed.

### Relationship Chart:

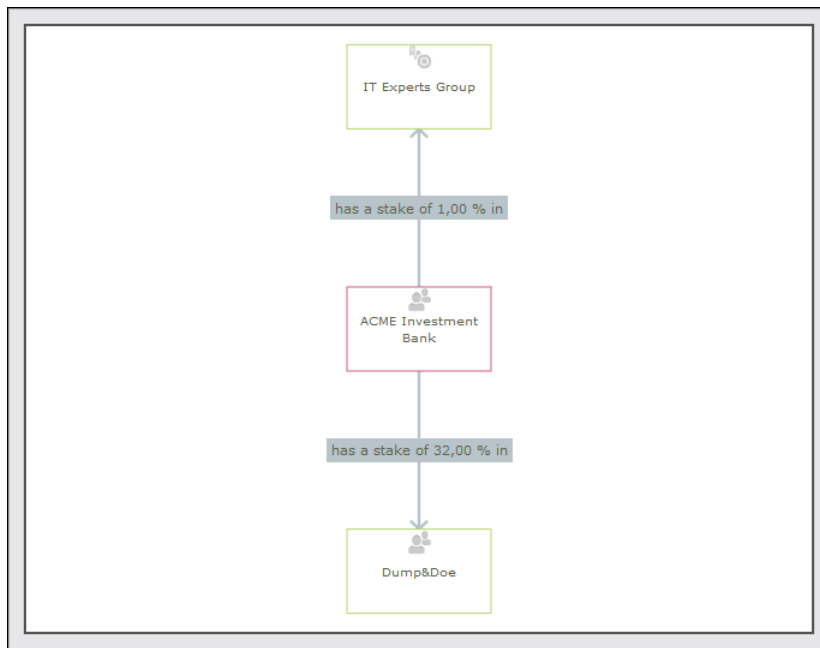


The current record is displayed in the center. All company and person records that are linked to the current record via a relationship are displayed surrounding the current record.

Click on **+** (**New Relationship**) to add a new relationship, >> [Adding Relationships](#) on page 226.

The relationships stored for the currently selected record are displayed on the left. Select **Edit Relationship** from the context menu to edit the relationship.

## Stake Structures:



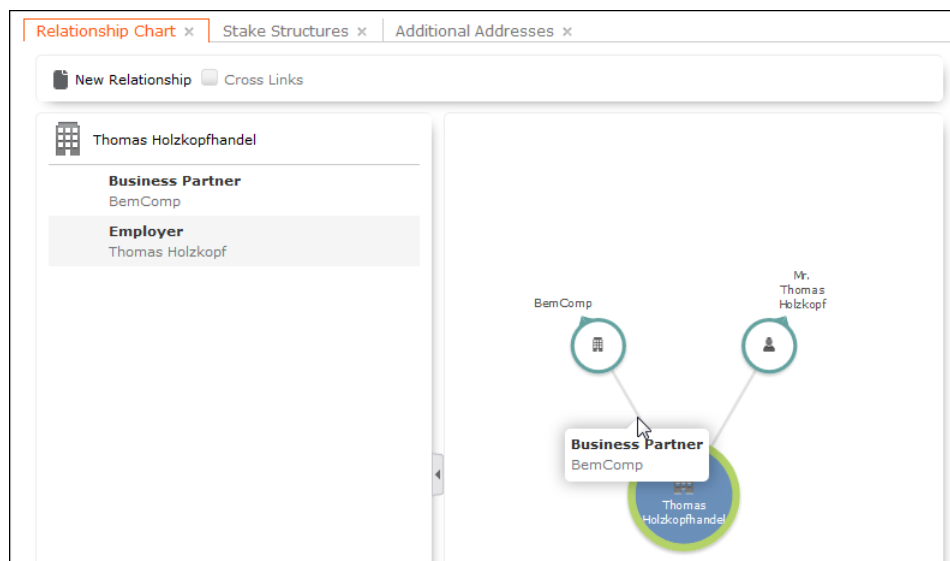
The current record is displayed in the center. The customers the current customer holds a stake in are displayed surrounding the current record. The ownership percentage is displayed over the connecting lines.



- You can drag customers (nodes) in the chart to a new position.
- Click on a customer to open the customer record.
- Hover the mouse cursor over a customer to display additional information on the customer (e.g. their ABC classification).
- Click on **+** (**New Stake**) to add a new record, >> [Adding Stakes](#) on page 227.
- Click on **✎** (**Edit Stake Structures**) to edit existing records, >> [Displaying, Editing and Deleting Relationships and Stakes](#) on page 228.

## Relationship Network

The relationship network displays all a company or person's relationships with other companies and persons.





Multiple levels can be displayed in the relationship network.



- The current record (company or person) is displayed at the center (large node with a green border). All records that are linked to the current record via a relationship are displayed surrounding the current record. Reciprocal relationships are not displayed.
- Move the mouse cursor over a connecting line to display the type of relationship.
- Click on  on the left to open the side bar containing a list of the relationships stored for the current record (note that any predefined filters are also applied to this list). Open the context menu for an entry in the list and select the person or company's name to display the company or person in the quick view. Click on  to close the side bar.
- Click on a node in the tree to select that company or person. The list of relationships on the left is updated to display the relationships defined for the selected company or person.
- Double-click on a node to open the corresponding record.
- Click again on a selected node to hide or display all relationships defined with that company or person. The nodes are color-coded according to their level in the network (i.e. how many degrees of separation lie between the node and the current record).
- Select a node and click on **+** **New Relationship** to add a new relationship for the selected company or person, >> [Adding Relationships](#) on page 226.

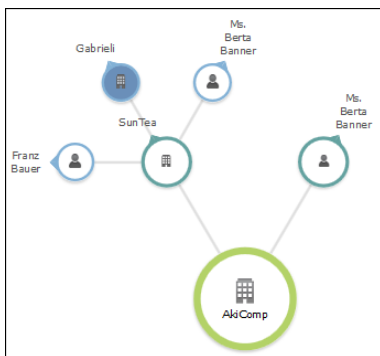
The relationship tree is refreshed once the relationship has been added.

- Click on a node and hold down the mouse button to open the company or person in the quick view. You can access the record's context menu from the quick view.

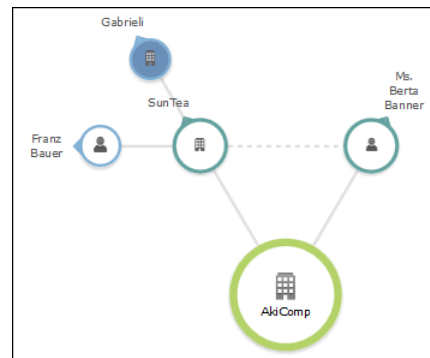
- Use your mouse wheel to zoom.
- You can scroll the view and reposition nodes in the network:
  - Click anywhere in the network where the  mouse cursor is displayed to scroll in the network.
  - Click on a node and then click on it again while holding down the mouse button (the mouse cursor is displayed as ) to move the node. Any child nodes are also moved.
- If the current record has relationships with more than 10 records (by default), the  and  nodes are displayed. Click on these nodes to display additional records that relationships have been defined with.
- Enable the **Cross Links** option to prevent the same record being displayed multiple times in multiple nodes (when more than one company or person is related to the same company/person). Each company/person is only displayed once and a dotted line indicates the additional relationships with a node.

**Example:** If a relationship is defined between a person and two companies, and a relationship has also been defined between these two companies, the person is displayed twice, once for the relationship with each company. If the **Cross Links** option is enabled, the person is only displayed once and a dotted line links the second company to the person.

**Cross Links disabled**



**Cross Links enabled**




## Defining Relationship Levels

The relationships that are available for selection are defined in the **Relationship Level** info area.

**Note:** You can only add records to the **Relationship Level** info area if you have the necessary access rights.

To add a relationship level record:

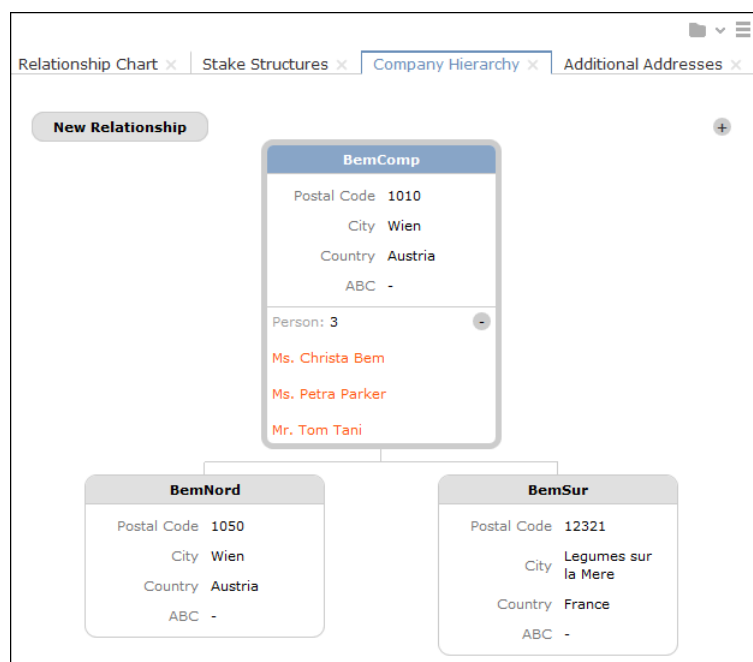
1. Select  (**Settings**) > **Maintenance** > **Relationship level**.
2. Click on **Start Search** and then on **+** (**New**).
3. Enter the **Relationship**, **Relationship type**, **Recip. Rel.** (reciprocal relationship) and **Recip. Rel. Type** (reciprocal relationship type).
4. Save the record.

The defined relationship can then be selected when adding relationships.

## Company Hierarchy

The company hierarchy displays an overview of a company or association's **corporate relationships** (parents, subsidiaries, holdings) with other companies/associations.

The **Company Hierarchy** tab is only available for companies/associations.




- Click on **+/-** to show/hide the contact persons at a company.
- Click on **New Relationship** to add a new relationship, >> [Adding Relationships](#) on page 226.

You can only add relationships with business clients or associations, and the relationship type is always set to "Corporate Relationship".

- Click on the name of a company or person in the chart to open the company or person record.

## Affiliation View

By default, only data added for the current customer is displayed. The affiliation view allows you to display data concerning other customers that are affiliated with to the current customer. For example, you can display activities for both the current person and all related persons (e.g. household members) at once.

Click  > **Affiliation View** to enable the association view globally (indicated by a tick in the check box). Aurea CRM web stores this setting between sessions.

### Example:

Activities displayed for a customer in the default view:



Starts on	Starts at	Subject	Status
07.02.2014	17:01	Check up	Planned

Activities displayed for a customer in the association view, including activities added for all association members.



Starts on	Starts at	Subject	Status
07.02.2014	17:01	Check up	Planned
07.02.2014	18:00	Sales tour	Planned

If configured accordingly, the affiliation view provides an overview of the customer records (e.g. the company (**Name** field) or person (**First Name** and **Last Name** fields) an activity belongs to).

The affiliation view is available in lists, queries and the tree view.

The affiliation view is available in the following areas: transactions, revenue, activities, interests, documents, product overview, incidents, contracts/bundles, product roles, contract/bundle roles, contact persons.

---

**Note:** Your administrator is responsible for defining whether you can access the affiliation view and which relationships can be taken into account.

The affiliation view only displays child data stored for records that are directly linked to the current record. Indirect relationships are not included. For example, the affiliation view can only include records added for immediate subsidiaries, but not records added for the immediate subsidiaries' subsidiaries.

If you define which other customers are included the affiliation view of a customer, these settings are visible to all users.

---

To determine which customers are displayed in the affiliation view:

1. Switch to the desired customer.
2. Click on  (**Select Affiliates**).

All customers where a relationship with the current customer has been defined are displayed graphically in a relationship network, >> [Relationship Network](#) on page 230.

Move the mouse cursor over a connecting line to display the type of relationship.

3. Click on a node to select it and click on **Add to Affiliation** or **Remove from Affiliation** to define whether the corresponding record is an affiliate of the current customer.

You can select more than one node (Ctrl + Click).

Affiliates are highlighted in orange. Hover the mouse cursor over a node to display whether that company or person is defined as an affiliate.

4. Click on **Close** to close the view.

Select **Close & Refresh** to close the view and refresh the display to include data stored for the selected affiliates.

---

**Note:** When defining a query, you can enable the **Include Associations** option to include records stored for association members in the results. If the status of the check box is , records stored for association members are included in the results if the **Association View** check box is enabled in the main menu.

---

## Additional Addresses

You can add additional addresses for customer, e.g. the customer's second home.

To add an additional address:

1. Switch to the desired customer (company, person, contact person on the **Contact Person** node in the company tree).
2. Click on **+** (**New**) on the **Additional Addresses** tab.
3. Select the additional address's **Address Type**.

---

**Note:** You can only add one additional address per account and **Address type**.

---

4. Enter the address and additional contact information.
5. Save the record.

## Interests

You can store information on a customer's interests (e.g. hobbies or whether they wish to receive certain newsletters). Interests may also be useful when meeting a business partner, in order to strike up a conversation.

Which interests are available is defined by your administrator.

To assign interests:

1. Switch to the desired customer.
2. Click on **Interests** in the tree.
3. Click on **♥** (**Manage Interests**) in the results list.

A dialog opens.

**♥ Interests for Chris Aki**

✓

**Culture**

Art       Film       Opera       Theater

---

**Information**

Annual Report     Event       Newsletter     Press Releases     X-Mas Greetings

---

**Sport**

Football       Golf       Riding


4. Enable the corresponding check boxes to assign interests to the customer.
5. Save the record.



## Fact Sheet

The fact sheet contains an overview of the information stored for a customer and is suitable for printing.

To generate the fact sheet:

1. Switch to the desired customer.
2. Click on  (**Fact Sheet**) in the header.

The fact sheet is generated.

---

**Note:** Your browser's popup blocker may prevent the fact sheet from being displayed.

---

3. Click on  to print the fact sheet.

# 3

## Activities and Appointment Management

---

Aurea CRM web's appointment management supports you in collaborating efficiently within your company and with your customers.

You can do the following:

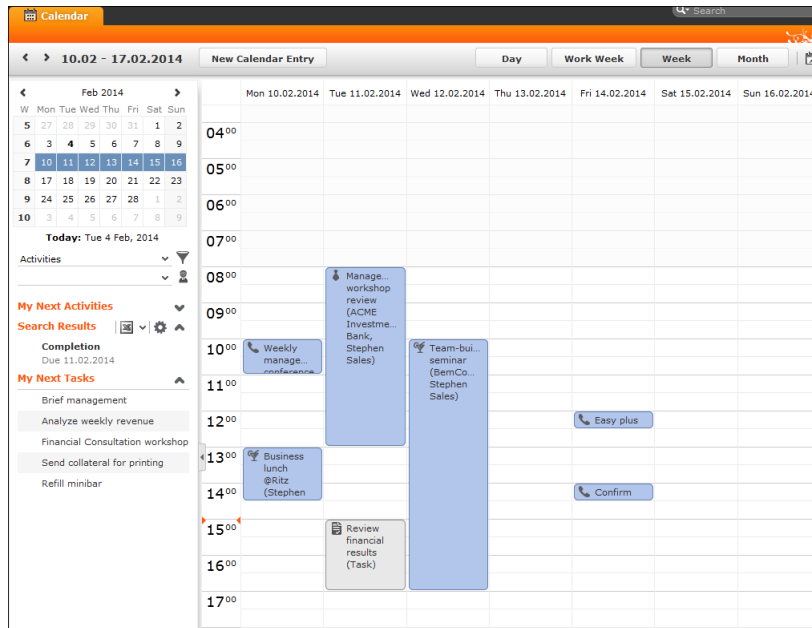
- Display an overview of your appointments in the calendar, see [Calendar](#) on page 238.
- Display, edit and delete appointments, see [Adding Appointments](#) on page 241, [Adding Activities](#) on page 245 and [Adding Tasks](#) on page 252.
- Use filters to determine which appointments are displayed in the calendar, see [Filtering Appointments](#) on page 242.
- Handle conflicting appointments, see [Appointment Planning](#) on page 244.
- Send and reply to e-mails from appointments, see [Activities and E-mails](#) on page 250.
- Use tasks, reminders and To-Dos to structure your work, see [Tasks](#) on page 252.
- Schedule customer visits in the daily and weekly planning view, see [Daily and Weekly Planning](#) on page 255.

### Calendar

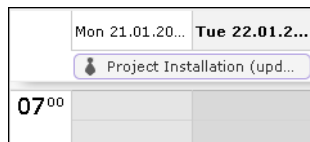
The calendar displays activities and tasks.

To open the calendar:

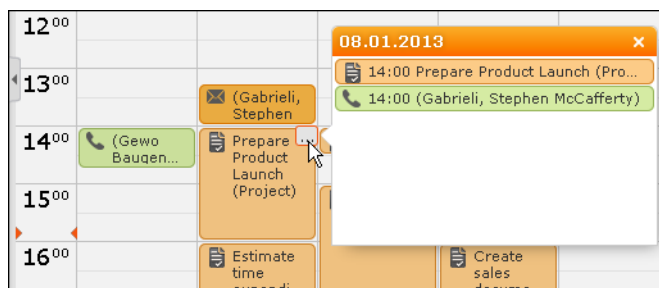
1. Select  (**Collaboration**) > **Calendar**.



- Different types of appointment are indicated using different icons (for telephone calls, visits etc.). Click on **⚙ (Edit Settings)** to determine how appointments are color-coded (e.g. by type or rep).
- Click on **❓ (Legend)** to display an overview of the color-coding in the calendar.
- Click on the entries in the header to determine whether to display a **Day**, **Work Week**, full **Week** or **Month** in the calendar.
- The orange cursor in the time bar indicates the current time.
- Appointments lasting all day or spanning several days are displayed in a bar at the top of the calendar (below the date).

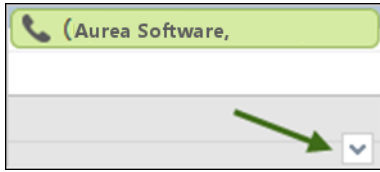


- Concurrent appointments cannot be displayed in the week view of the calendar. Click on "... " to display these appointments in a new window.




- Only a limited number of appointments can be displayed per day in the monthly view. Click on **+ x more** to display all the appointments in a separate window.

- If appointments have been entered that cannot be displayed in the visible area, the following icon is displayed at the bottom edge of the visible area:



- You can display or hide the sidebar:

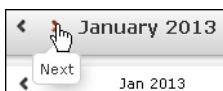


- You can display your most important appointments (e.g. your next 5 activities) in the sidebar. Select  (**Settings**) > **User Configuration** to select which items to display in the sidebar (**Activities** tab). Your administrator can determine how many records are displayed.
- You can filter the records displayed in the calendar to only display those you require, >> [Filtering Appointments](#) on page 242.
- Holidays are color-coded.
- If the time zone used by your device is changed (automatically or manually), you can determine that Aurea CRM takes the current time zone into account (provided you have the necessary access rights), >> [Date & Time Tab](#) on page 57. You need to close and restart your web browser to display the new time zone in the calendar.

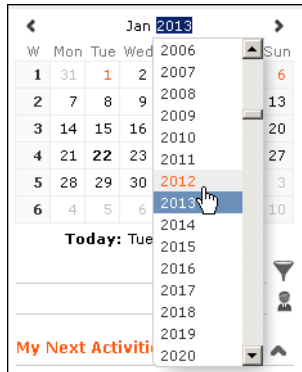
## Navigating in the Calendar


You can navigate in the calendar using the following options:

- Use the arrows to switch between pages in the calendar:



- You can use the calendar in the sidebar to:
  - Click on a day to switch the view to just that day.
  - Click on a calendar week to display that work week.
  - Click on the month or year and select an entry from the drop-down list update the calendar accordingly (the view type remains unchanged).



- Use the arrows to move forward or back one month
- When in the day view, hold down Ctrl and click on days in the calendar to display multiple days at once.
- Click on **Today** to display the current date in the day view.
- Click on  (**Daily & Weekly Planning**) to open the daily and weekly planner, >> [Daily and Weekly Planning](#) on page 96.

## Adding Appointments

To add a new appointment in the calendar:

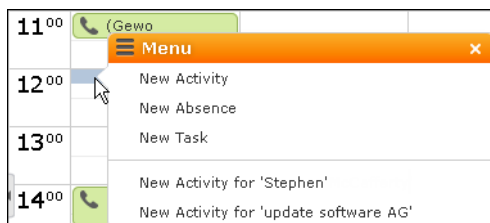
1. Double-click on a free time slot in the calendar or click on a free time slot and click on **New Calendar Entry**.

---

**Note:** You can also add appointments from outside the calendar using the menus, >> [Adding Activities](#) on page 245 and [Adding Tasks](#) on page 252.

---

2. Select whether to add a new activity or task, or to add a new activity for yourself or your company, >> [Appointment Types](#) on page 245.



3. When adding an activity, select the company or person the activity should be added for.
4. Enter the details and save.

You can also add an activity for yourself as follows:

1. Switch to the day, work week or week view in the calendar.
2. Click on a free time slot in the calendar.

A quarter hour period is highlighted in gray.

3. Start typing to enter a subject for the activity and confirm your entry with Enter. The appointment is added, and you are automatically entered as the rep.

## Opening Appointments

You can open an appointment as follows:

- Double-click on an appointment to open it in tabbed view.
- Click on the appointment's icon to open it in a popup window.



- Select **Open** from the menu in the popup window to open the record in tabbed view.
- You can also open appointments in the sidebar by clicking on their icon.
- You can reschedule appointments by dragging the appointment to the desired time (in all views except the month view) or to the desired date (in all views except the day view). Drag the top or bottom edge of the appointment to change the length of the appointment (not available in the month view).

## Editing Appointments

Edit an appointment by entering the desired data in the fields. For more details, >> [Appointment Types](#) on page 245.

To delete an appointment:

- Select the appointment in the calendar and press the Delete key on your keyboard. Hold down Ctrl while clicking to select multiple appointments to delete at once.
- Select **Delete** from the context menu.

## Filtering Appointments

Use filters to determine which appointments are displayed in the calendar.


To filter the calendar entries, select a general or rep filter from the drop-down lists in the sidebar to restrict the display to only those appointments that meet the filter criteria or where the selected reps are entered:




**Note:** By default, activities of the types "Letter", "Fax", "E-mail", "Internet", "Social", "Info" and "Missed" activities are not displayed.

## Defining General Filters

To define a filter:

1. Click on  (**Define Filters and Filter Sets**) in the sidebar.  
The **Define Filters and Filter Sets** window is displayed.
2. Enable the check box next to the entries you wish to display in the calendar.
3. Select **Edit Filter** from the context menu next to an entry to define a condition that needs to be met by entries of that type for them to be displayed in the calendar, >> [Conditions](#) on page 108.
4. To save your selection to be reused later, enter a name in the **Rep Set** field and click on **Save**.

The filter set is saved.

**Note:** The first value in the drop-down list has no name; however you can select this entry and change its settings. Changes made to this entry are saved automatically. To delete a filter set, select the desired filter from the drop-down list, click on  (**Define Filters and Filter Sets**) and then click on **Delete**.

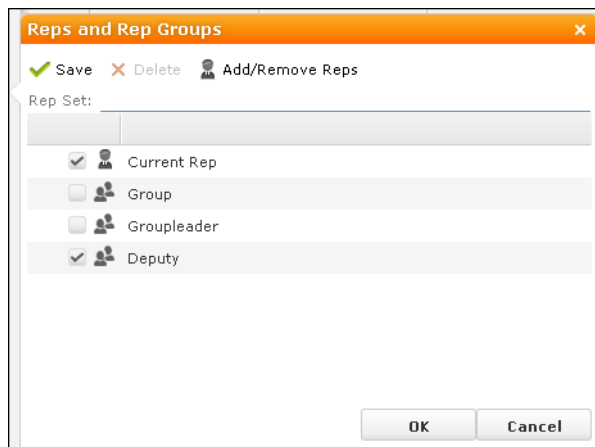
5. Click on **OK**.

## Defining Rep Filters

To define a rep filter:

1. Click on  (**Reps and Rep Groups**) in the sidebar.

The **Reps and Rep Groups** window is displayed.




2. Enable the check boxes next to the reps or groups whose appointments should be displayed.
3. To add additional reps to the list:
  - a. Click on **Add/Remove Reps**.

The **Select Rep** window is displayed, >> [Selecting Reps](#) on page 89.
  - b. Select the desired rep and click on **OK**.
4. To save your selection to be reused later, enter a name in the **Rep Set** field and click on **Save**.

The rep set is saved.


---

**Note:** The first value in the drop-down list has no name; however you can select this entry and change its settings. Changes made to this entry are saved automatically. To delete a rep filter set, select the desired filter from the drop-down list, click on  (**Reps and Rep Groups**) and then click on **Delete**.



---

5. Click on **OK**.

## Appointment Planning

To open the appointment planning area, open an activity, switch to edit mode and click on  (**Appointment Planning**) next to a rep field. You can move the appointment in this area while taking into account the availability of all reps.



Scheduling	
<b>Reps</b>	09.01.2013 13:00 - 16:00
John Doe	
Simon Eder	
Simon Fourcade	 E

## Appointment Types

Activities are used to store details regarding contact with customers, >> [Activities](#) on page 245.

Tasks allow you to store tasks, e.g. what needs to be completed within the scope or projects (which may be customer-independent), >> [Tasks](#) on page 252.

## Activities

You can add an activity as follows:



- In the calendar, >> [Adding Appointments](#) on page 241.
- From outside the calendar, >> [Adding Activities](#) on page 245.

For information on recurring activities, >> [Recurring Activities](#) on page 248.

For information on e-mails, >> [Activities and E-mails](#) on page 250.

## Adding Activities

To add an activity:

1. Select  (**Collaboration**) > **Activities** and click on **Start Search**.
2. Click on  (**New**).
3. Select who the activity should be added for (person, company etc.). Search for and select the desired company or person.

The screenshot shows a 'New Activity' form with the following fields and options:

- \*Starts on:** 07.02.2014
- Ends on:** (empty)
- Type:** Telephone
- Status:** Planned
- Starts at:** 17:06
- Ends at:** (empty)
- \*Subject:** (empty text field)
- Private:**
- Rich Text Editor:** Includes bold (B), italic (I), underline (U), strikethrough (I<sub>x</sub>), text color (A), background color, bulleted list, numbered list, decrease indent, increase indent, link, unlink, insert link, insert image, and a 'Format' dropdown. Font and size dropdowns are also present. Character count: 0 / 24000.
- Internal Participants:** Tab selected. Shows 'Rep: Andy Admin' and 'Assigned by: (empty)'. Below is a table:
 

Participant(s)	Required	Optional	For Information
Andy Admin	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Add a value...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Add a value...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Add a value...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4. You need to enter a **Subject** in order to save the activity.
5. Select the **Type** of activity.
6. You can enter information on the activity in the **Text** field and format the text accordingly.
7. The current date and time are automatically entered as the start of the activity. You can edit the date and time.
8. The following fields are entered automatically and can also be edited: **Type**, **Rep**, **Status** = Planned, **Priority** = high.
9. Enter further information concerning the activity on the following tabs:
  - **Internal Participants:** Select the activity's participants (>> [Adding Internal Participants](#) on page 247).
  - **Qualification:** You can enter various information concerning the activity, such as its purpose.
10. Save the record.  
The activity is displayed in the company or person's tree view.

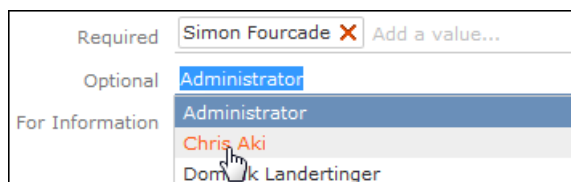
11. You can add additional external participants, >> [Adding External Participants](#) on page 247.
12. You can store information on consultations held within the scope of an activity, >> [Consultation Documentation – FSI](#) on page 318.


**Note:** You can also add activities with the status "Scheduled" or "Completed" from the **Activities** node in the company/person tree view. Select either **Plan Activity** or **Document Activity** from the drop-down list in the header.

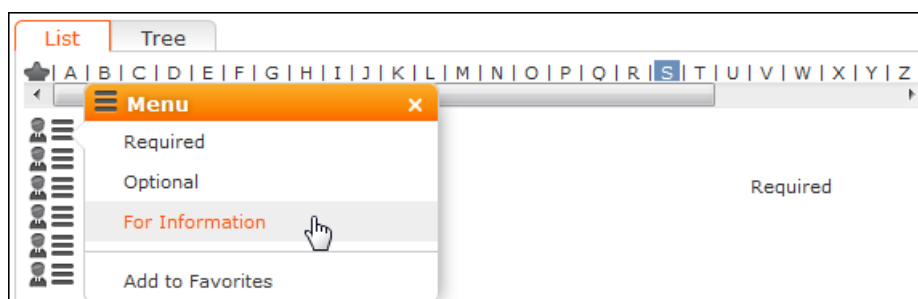
## Adding Internal Participants

Enter internal participants in the **Required**, **Optional** and **For Information** fields:

- Click on **Add a value** and select an entry from the drop-down list:



- Or click on **Add a value** and begin typing the name of the rep. Aurea CRM lists all matching reps.
- Click on  (**Select Rep**), to select the desired rep in a separate window, >> [Selecting Reps](#) on page 89. You can then select the desired participation type from the rep's context menu.










## Adding External Participants

You can add external participants to an activity under **Participants** below the record.

1. You can choose to add a company, person or a record in your favorites.
2. Select the desired person or company.

The selected participants are displayed under **Participants** below the record.

The participation type is indicated with an icon:

- In the **T** (Type) column:  = Required,  = Optional and  = For Information
- In the **S** (Status) column:  = Accepted,  = Open,  = Declined,  = Not relevant

The person or company for which the appointment was added is displayed as a link.

3. To change the participation type and status, select the options available under **Participation Type** or **Participation Status** in the participant's context menu.
4. Save the record.


## Recurring Activities

You can add recurring activities that take place at regular intervals.

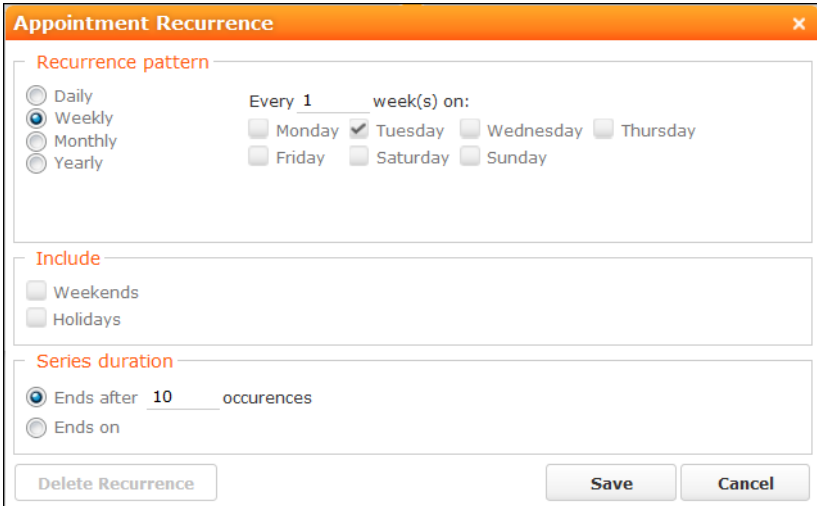
You can determine the frequency (e.g. daily, weekly, monthly or yearly) in the first activity (the main activity), from which you can then generate the remaining appointments.

### Adding Recurring Activities

To add a series of recurring activities:

1. Add the first (main) activity.
2. Click on  (**Recurrence**).

The **Appointment Recurrence** window is displayed.




3. Determine the whether the activities should recur on a **Daily**, **Weekly**, **Monthly** or **Yearly** basis.

- 
4. Depending on your settings, you can determine when the activity is repeated:
    - **Daily:** The number of days before the activity is repeated.
    - **Weekly:** The number of weeks before the activity is repeated and the day of the week. You can select multiple weekdays.
    - **Monthly:** The number of months before the activity is repeated; the day of the month; the day of the week.
    - **Yearly:** The number of years before the activity is repeated; the day and month; the day of the week.

When repeating activities on a monthly or yearly basis, enable **Do not create substitute activities** to prevent activities that would fall on a holiday or weekend from being moved to the next work day.

5. Enable the **Weekends** and **Holidays** options if activities should also be added on holidays or weekends.
6. Define the **Series duration**:
  - **Ends after:** The number of recurring appointments after which the series ends.
  - **Ends on:** Date on which the series should end.

7. Save the data.

The activities are generated. Recurring activities are indicated using the  icon.

---

**Note:** The following fields are **not** transferred from the main activity to subsequent activities: **Starts on, Results, Status, Satisfaction**.

---

## Editing Recurring Activities

To edit activities that are part of a series of recurring activities:

1. Edit the first activity in the series that you want to apply changes to.
2. Save the record.

You will be asked whether you wish to apply your changes to just the one activity or to the remaining activities in the series starting from the current activity.

---

**Note:** Fields that are not transferred from the main activity to other activities in the series are not transferred when applying these changes, >> [Adding Recurring Activities](#) on page 248.

---

3. Select the desired option and confirm with **OK**.

## Deleting Activities in a Series

To delete one or more activities that are part of a series of recurring activities:

1. Select **Delete** from the activity's context menu.

You will be asked what you wish to delete:

- Just this activity
- This activity and all subsequent activities
- The entire series

---


**Note:** If you have chosen to delete the main activity, you can only choose to delete the entire series.

---

2. Choose the desired option and confirm with **OK**.


## Editing the Recurrence Pattern

To edit the recurrence pattern of an entire series:

1. Click on  (**Recurrence**) in the main activity record.
2. Edit the recurrence pattern and click on **Save**.

The activities in the series are deleted and new activities are generated based on the new settings. The main activity is not deleted.

To edit the recurrence pattern for part of a series:

1. Open the activity in the series from which point on you wish to change the recurrence pattern.
2. Click on  (**Recurrence**).
3. Edit the recurrence pattern and click on **Save**.

A message is displayed informing you that this activity is part of a series of activities, and you are asked if you wish to use the activity as the main activity of a new series.

4. Click on **OK**.

All activities in the series following this activity are deleted and the appointments in the series are generated anew.

## Activities and E-mails Notifying Reps

You can send an e-mail to all an activity's **internal participants**, e.g. if you need to reschedule the appointment.

To notify the reps:

1. Select **Notify Recipients** from the context menu of the activity.

If your administrator has determined that e-mails are sent from your e-mail client, your e-mail client is opened. If e-mails are sent by via the Aurea CRM server, the following window opens:

**Notify about record**

You can send this record to any other rep and/or external recipient. Please specify what you want to send:

**Recipients:**

- Simon Eder ( [redacted] )
- John Doe (j.doe@test.com)
- Ms. Chris Aki ( [redacted] )

**CC:**

- [redacted] ( [redacted] )

Additional internal recipients: \_\_\_\_\_

Additional external recipients: \_\_\_\_\_

**Subject:**  
Rescheduling

**Body:**  
Unfortunately we have to reschedule for 17:00 due to the room being booked until 16:45/  
  
kind regards,  
Arthur

Insert update CRM web link

Request a delivery receipt

2. Enable the check boxes next to the persons you wish to notify under **Recipients**.
3. You can add additional recipients to the **Additional internal recipients** and **Additional external recipients** fields.
4. The contents of the **Subject** and **Text** fields in the activity are transferred to the e-mail, but you can still edit them in the e-mail.
5. Use the following check boxes to carry out the corresponding action: **Insert Aurea CRM web link**, **Insert Aurea CRM win link**, **Request a delivery receipt**, **Request a read receipt**. Your administrator is responsible for defining which options are available.
6. If your administrator has enabled the corresponding option, click on **Insert Signature** to insert your e-mail signature.
7. The documents linked to the activity are added as attachments.

---

**Note:** Your administrator can determine that certain types of files or files exceeding a certain size are not sent. When sending e-mails from your e-mail client, no attachments can be added.

---

8. Click on **Send** to send the e-mail.

## Tasks

You can add tasks as follows:


- In the calendar, >> [Adding Appointments](#) on page 241.
- From outside the calendar, >> [Adding Tasks](#) on page 252.

In order to organize complex tasks, you can:

- Add tasks for yourself or for (several) other reps.
- Display tasks as projects, and divide them into sub-projects, >> [Task Hierarchy](#) on page 254.

## Adding Tasks

To add a new task:

1. Select  (**Collaboration**) > **Tasks**.
2. Click on **Start Search** and then on ⊕ (**New**).
3. Determine whether the task should be added for a **Person**, **Business Client/Association** or whether the task is an **Internal Task**.



**New Task**

**New: Task**

✓ ○

▼ **Overview \***

Template  🔍 ✕

Type **Task** ▼ Priority ★ ★ ★ Private

\*Subject **Legal compliance review**

Status **Open** ▼

Text

**B I U S Ix A -** **Format** ▼ **Font** ▼ **Size** ▼ Characters: 0 / 12000

▼ **Participants & Appointments**

Task for Required

Optional

For Information

Single Task

Starts on  ▼ Due on  ▼ Escalate on  ▼

Starts at  ▼ Due at  ▼ Escalate at

Completed on  ▼ Reminder duration  Responsible

Completed at  Reminder duratio...

Values are automatically entered in some fields, such as **Due on** and **Due at**. You can edit these values.



4. You can select a task template from the **Template** field, >> [Task Templates](#) on page 254. The values entered in the template are automatically transferred to the fields in the new task.
5. Enter a **Subject** for the task.
6. You can enter additional information concerning the task in the **Text** field and format the text.
7. Save the record.

Click on **+** on the **Sub-Tasks** tab to add a new task as a sub-task of the current task. Click on **Link existing tasks as sub-tasks** in the header to link an existing task to the current task as a sub-task, >> [Task Hierarchy](#) on page 254.

## Task Templates

If you regularly add similar tasks, you can save the task data in a task template and use the template when adding a task, reducing the time it takes to enter data.

To add a task template:

1. Select  (**Collaboration**) > **Task Templates**.
2. Click on  (**New**).
3. Enter the data.
4. Save the record.

## Changing the Status of a Task

Select an option from the task's context menu to set its status:


- **Completed / Missed**
- **Accept / Refuse**

If you set a task to "Completed", all its sub-tasks are also set to "Completed".

## Task Hierarchy

You can create a hierarchy of tasks to depict complex structures for projects.

To structure tasks with sub-tasks:

- Switch to the **Sub-Tasks** tab in a task record and click on  (**New**) to add a new sub-task.
- Assign existing tasks to a parent task as sub-tasks:
  1. Click on **+** (**Link existing tasks as sub-tasks**) in the header of the parent task (the task the sub-tasks should be assigned to).
  2. Select the tasks (Ctrl+click to select multiple tasks) and click on the tick above the list.

The selected tasks are linked to the parent tasks as sub-tasks and are displayed on the **Sub-Tasks** tab.

**Create sales reports**

Template: [Search] Status: Open Participation... Open

\*Subject: Create sales reports

Responsible: SU9100 !Due on: 18.06.2014 Priority: ★★☆☆

Created by: SU9100 !Due at: 17:00 Private:

Text

- Collect sales figures from all subsidiaries
- Merge data
- Create snazzy graphics to wow investors

Participants & Appointments

Starts on: 18.06.2014 Completed on: Reminder du...

Starts at: 15:01 Completed at: Reminder du...

Sub-Tasks x History x

Subject	Responsible	Status	Priority	Due on	Due at
Create graphical breakdown		Open	Medium	18.06...	17:00
Collect sales figures		Open	Medium	18.06...	17:00
Collate data		Open	Medium	18.06...	17:00

**Note:** If you delete a task, all its sub-tasks are also deleted.

## Daily and Weekly Planning

You can use the daily and weekly planning area to plan your customer visits and add activities.

To add an activity in the daily & weekly planning area:

1. Click on  (**Daily & Weekly Planning**) in the calendar.

The search area and calendar are displayed.

2. You can define default values for certain values under **Activity Defaults** in the sidebar. These values are automatically transferred to activities you add in the daily & weekly planning area.

The **Subject** field is mandatory.

These default values are only valid as long as you are in the daily & weekly planning area. If you switch to another info area and then reopen the daily & weekly planning area, the default values are reset.

3. To search for companies or contact persons instead of persons, select a different entry from the drop-down list in the header.



---

**Note:** By default, you can search for companies, persons and contact persons. Your administrator can configure additional search options, >> DayWeekPlanning in the *Aurea CRM web Administrator Guide*.

---

4. Enter your search criteria and click on **Start Search**.


The search results are displayed in the results list between the search mask and calendar.

The screenshot displays a software interface for daily and weekly planning. At the top, there are tabs for 'Daily & Weekly Planning' and 'Contact Person Mr. Andrea Gabrieli'. A search bar is located in the top right corner. Below the search bar, there is a section for 'Search Persons' with input fields for 'Name', 'Department', 'Rep ID', and 'Company'. A 'Start Search' button is present. The search results are displayed in a table with columns: Last Name, First Name, Function, Department, Area Code, Tel 1, Company, and E-mail 1. The results include entries for Aaron Jonne, Aki Chris, Sandra, Ilona, and John Doe. Below the search results, there is a calendar view for January 2013. The calendar shows a weekly layout with time slots from 08:00 to 17:00. Various activities are scheduled, such as 'Project', 'update', 'Gewe', 'Biathlonverb...', 'Estimate costs', 'Create documents', 'Create marketing brochures', and 'Create sales documents'. The interface includes navigation buttons like 'New Calendar Entry', 'Day', 'Work Week', 'Week', and 'Month'.

5. Drag the desired company or person to the desired time slot in the calendar to add an activity.

The activity is added with the activity default values you have defined (the default duration is one hour).

You can select multiple entries in the search results (by holding Ctrl while clicking) and drag these to the calendar. The appointments are added one after another (in the order in which you clicked on the records).

6. The other functions in the daily & weekly planning area (e.g. filters, switching views) function the same as in the calendar, >> [Calendar](#) on page 238.
7. Click on  (**Calendar**) to switch to the calendar.

# 4

## Incident Management – FSI

Learn how to generate and manage incidents to keep in touch with your customers.

Events, such as customers' birthdays, a lengthy period with no contact, expiring products, focus on specific products etc. are good reasons for getting in contact with customers.

Incidents in suite are generated by systematic, automated database queries based on freely definable criteria, see [Generating Incidents](#) on page 261.


Use incident locks to stop incidents being generated for a particular customer, see [Incident Locks](#) on page 263.

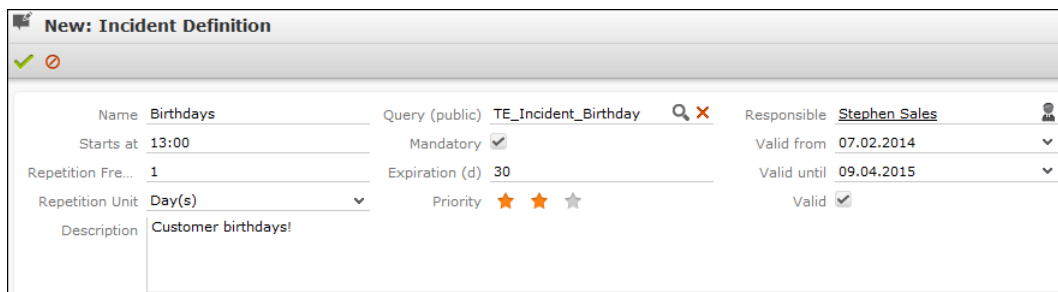
The generated incidents can then be displayed for processing, e.g. on a rep's start page, see [Editing Incidents](#) on page 264.

### Generating Incidents

You can define incidents if you have administrator rights. Here you define the criteria that is used to determine which customers should be contacted and how, and enter data such as the time period, frequency and a message for the corresponding rep.

To define an incident:

1. Select  (**Collaboration**) > **Incident Definitions**.
2. Click on **Start Search**.
3. Click on **+** (**New**).
4. Enter the following data:



New: Incident Definition			
Name	Birthdays	Query (public)	TE_Incident_Birthday
Starts at	13:00	Mandatory	<input checked="" type="checkbox"/>
Responsible	Stephen Sales	Valid from	07.02.2014
Repetition Fre...	1	Expiration (d)	30
Valid until	09.04.2015	Repetition Unit	Day(s)
Priority	★★★	Valid	<input checked="" type="checkbox"/>
Description	Customer birthdays!		

- **Name** of the incident
- **Starts at**: The time at which the incidents should be generated (if a large number of incidents are likely to be generated, schedule them for the night to reduce the impact on the system's performance)
- **Repetition Frequency** and **Repetition Unit**: Determines the frequency with which incidents should be generated.

---

**Note:** Duplicate incidents are not generated for recurring incidents; if an incident already exists for a customer, no new incident is generated.

---

- **Description:** Description of the incident including instructions
- **Query:** Select a query used to return customers for which incidents should be generated.

---

**Note:** The default version of Aurea CRM web includes a query for customers whose birthday is during the current week (TE\_Incident\_Birthday). You can use this query to generate incidents. You can also define additional queries, see [Queries](#) on page 98.

---

- **Mandatory:** Indicates whether the incident is mandatory.
  - **Expiration (d):** Used to calculate the end date of the generated incidents; the incident expires after this number of days.
  - **Valid from, Valid until:** Define the time period over which incidents are generated based on this incident definition.
5. Enable the **Valid** check box to determine that the incident definition is currently active. Incidents are only generated if this check box is enabled.
  6. Save the record.

Initial incidents are generated upon saving the record. From then on, incidents are generated automatically by CRM.server in the specified interval and for the duration of the validity period.

The related person's account manager is automatically entered in the **Responsible** field of the incident.

If an incident already exists for a person generated using the same query, a new incident is not added.

Your administrator can determine that incidents that are open, are not mandatory and have expired (the date in the **Ends on** field is in the past) are automatically set to "Missed". For more information, refer to the technical documentation.

---

**Note:** If you have administrator rights, you can also add incidents manually from a person's tree view (open the **Incidents** node and click on **New**). You cannot define more than one incident based on the same incident definition per person.

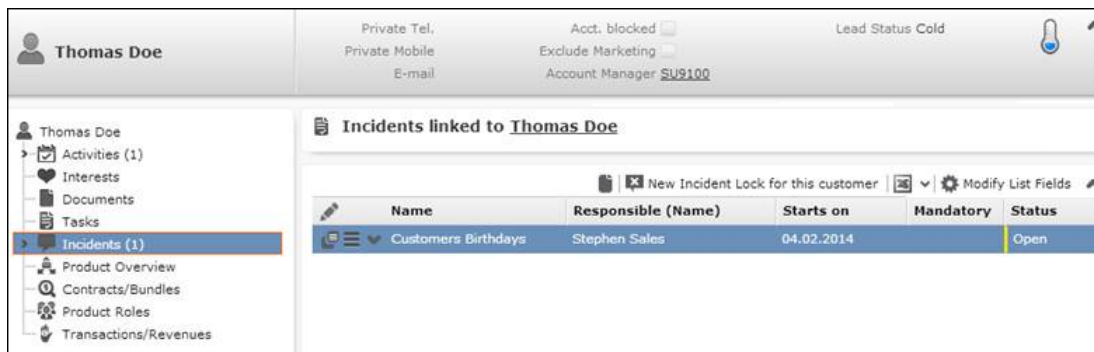
---

## Incident Locks

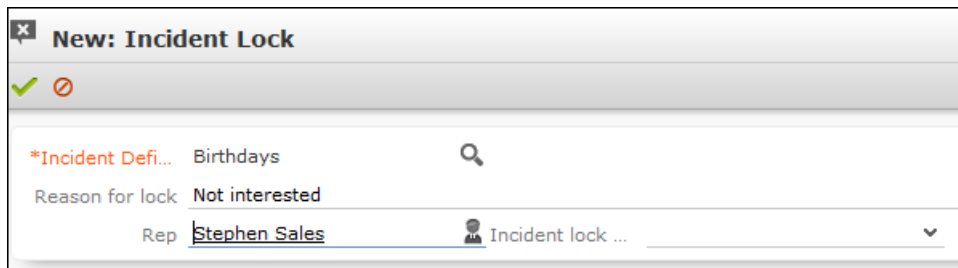
Use incident locks to stop incidents being generated for a particular customer.

To add an incident lock for a customer:

1. Switch to the **Incidents** node in the tree view of the company/person and click on **New Incident Lock for this Customer**.



2. Choose the **Incident Definition** that the lock should apply to.
3. Enter a reason for locking the incident.



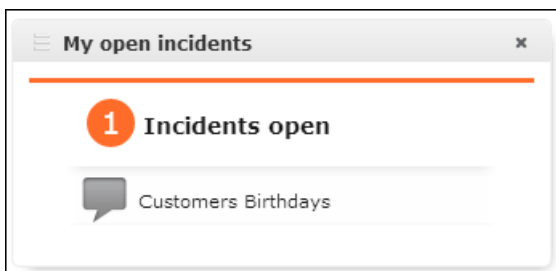
4. Enter a data in the **Incident lock ends on** field to define a time limit for the lock.
5. Save the record.


### Editing Incidents

Account managers can react to incidents by contacting customers, documenting consultations, forwarding them to an expert or sending an offer.

To edit an incident:

1. Open the incident.
- Current incidents can be accessed:
- On the start page (for account managers)



- In the tree view of a person, company or association (**Incidents** node)
- By selecting  (**Collaboration**) > **Incidents** from the menu.



**Customers Birthdays**

New Activity | Set to 'In progress' | Set to 'Done' | Set to 'Dismissed'

Incident Definition: Customers Birthdays  
Description: Birthdays of my customers

Status: Open | Starts on: 04.02.2014 | Ends on: 06.03.2014  
Responsible: Stephen Sales | Priority: Medium | Forwarded by: SU9100  
Completed on: \_\_\_\_\_

**Activities** x

Starts on	Starts at	Subject	Status
11.02.2014	17:07	Happy Birthday!	Planned


2. The following options are available:

- Change the status of the incident using the **Set to 'In progress'**, **Set to 'Done'** or **Set to 'Dismissed'** buttons.
- Create an activity for the incident. All activities added for the incident are displayed on the **Activities** tab below the record.
- Forward the incident to another rep by entering the rep in the **Responsible** field. You are automatically entered in the **Forwarded by** field.

## Generating Incidents

You can define incidents if you have administrator rights. They define the criteria that used to determine which customers should be contacted and how, and enter data such as the time period, frequency and a message for the corresponding rep.

To define an incident:

1. Select  (**Collaboration**) > **Incident Definitions**.
2. Click on **Start Search**.
3. Click on **+** (**New**).
4. Enter the following data:

- **Name** of the incident
- **Starts at:** The time at which the incidents should be generated (if a large number of incidents are likely to be generated, schedule them for the night to reduce the impact on the system's performance)
- **Repetition Frequency** and **Repetition Unit:** Determines the frequency with which incidents should be generated.

---

**Note:** Duplicate incidents are not generated for recurring incidents; if an incident already exists for a customer, no new incident is generated.

---

- **Description:** Description of the incident including instructions
- **Query:** Select a query used to return customers for which incidents should be generated.

---

**Note:** The default version of Aurea CRM web includes a query for customers whose birthday is during the current week (TE\_Incident\_Birthday). You can use this query to generate incidents. You can also define additional queries, >> [Queries](#) on page 98.

---

- **Mandatory:** Indicates whether the incident is mandatory.
  - **Expiration (d):** Used to calculate the end date of the generated incidents; the incident expires after this number of days.
  - **Valid from, Valid until:** Define the time period over which incidents are generated based on this incident definition.
5. Enable the **Valid** check box to determine that the incident definition is currently active. Incidents are only generated if this check box is enabled.
  6. Save the record.

Initial incidents are generated upon saving the record. From then on, incidents are generated automatically by CRM.server in the specified interval and for the duration of the validity period.

The related person's account manager is automatically entered in the **Responsible** field of the incident.

If an incident already exists for a person generated using the same query, a new incident is not added.

Your administrator can determine that incidents that are open, are not mandatory and have expired (the date in the **Ends on** field is in the past) are automatically set to "Missed". For more information, refer to the technical documentation.

**Note:** If you have administrator rights, you can also add incidents manually from a person's tree view (open the **Incidents** node and click on **New**). You cannot define more than one incident based on the same incident definition per person.

## Incident Locks

Use incident locks to stop incidents being generated for a particular customer.

To add an incident lock for a customer:

1. Switch to the **Incidents** node in the tree view of the company/person and click on **New Incident Lock for this Customer**.



2. Choose the **Incident Definition** that the lock should apply to.
3. Enter a reason for locking the incident.

**New: Incident Lock**

\*Incident Defi... Birthdays

Reason for lock Not interested

Rep Stephen Sales Incident lock ...

4. Enter a data in the **Incident lock ends on** field to define a time limit for the lock.
5. Save the record.

## Editing Incidents

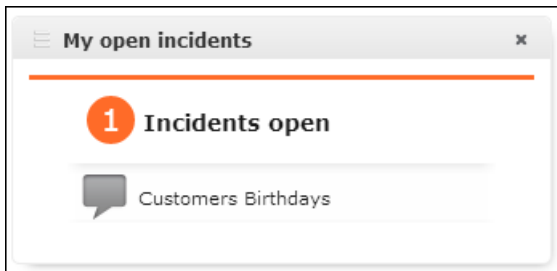
Account managers can react to incidents by contacting customers, documenting consultations, forwarding them to an expert or sending an offer.

To edit an incident:

### 1. Open the incident.

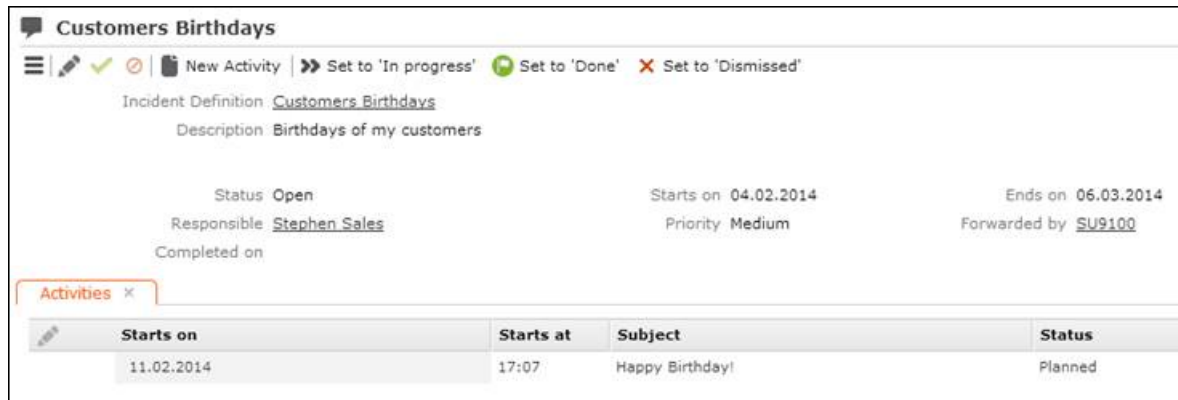
Current incidents can be accessed:

- On the start page (for account managers)



- In the tree view of a person, company or association (**Incidents** node)

- By selecting  (**Collaboration**) > **Incidents** from the menu.



### 2. You following options are available:

- Change the status of the incident using the **Set to 'In progress'**, **Set to 'Done'** or **Set to 'Dismissed'** buttons.
- Create an activity for the incident. All activities added for the incident are displayed on the **Activities** tab below the record.
- Forward the incident to another rep by entering the rep in the **Responsible** field. You are automatically entered in the **Forwarded by** field.

# 5

## Document Management

---


You can store existing documents in Aurea CRM web's database, e.g. a letter that you received from a customer.

### Opening Documents

You can open documents in read-only mode or edit them.

To open a document:

1. Search for the document using one of the following options:

- Select  (**Collaboration**) > **Documents** and start the search.
- Open a record (e.g. an offer) and switch to the **Documents** tab.

2. You can also open the document using one of the following options:

- Click on the document's title.
- Select **Open document** from the context menu.
- Select **Open** from the document's context menu and click on the file name in the **File** field.

The document is opened in the associated application (based on the document type).

---

**Note:** The document is read-only and any changes you make to the document are not stored in the Aurea CRM database.

---

### Saving Documents in the Database

---


**Note:** If your administrator has determined that you can upload multiple documents at once (>> Configuration Settings > Documents in the *CRM.core Administrator Guide*), you can select multiple documents of various types or drag them from your local file system to Aurea CRM.

---

The following options are available for uploading documents to the database:

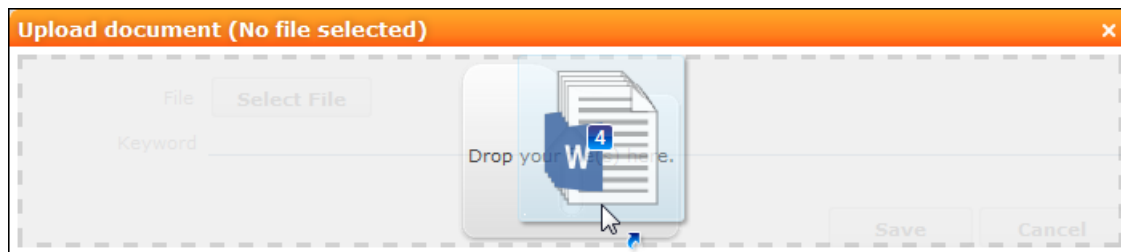
### Uploading a (Local) Document to the Aurea CRM database

1. You can choose to upload a general document, or upload the document to a specific record:

- Select  (**Collaboration**) > **Documents**, start the search and click on **+** (**New**).
- Open the record (e.g. an offer) and switch to the **Documents** tab under **Related Data**. Click on **≡** (**New**) and select **Upload new document**.

2. Click on **Select File** in the **Upload Document** window and select the desired document(s).

You can also drag the document(s) to the window using your mouse.



3. Save.



The record is displayed in tab view or in the list.

### Linking an Aurea CRM Document with a Record

1. Open the record (e.g. an offer) and switch to the **Documents** tab under **Related Data**. Click on **≡** (**New**) and select **Existing Aurea CRM Document**.
2. Select one or more documents.
3. Choose **Select** from the context menu.

## Replacing Documents in the Database


To replace an existing document in the database:

1. Select  (**Collaboration**) > **Documents**.
2. Search for the document you wish to replace.
3. Double-click on the record to open it.
4. Click on  (**Select / Upload Document**) next to the **File** field.
5. Select **Upload Document**.

6. Click on **Browse** and select the desired document.
7. Save the record.

## Deleting Documents

To delete a document:

1. Search  (**Collaboration**) > **Documents** and search for the document you want to delete.
2. Select **Delete** from the document's context menu.

A message is displayed with information on the number of links that exist to the document and the info areas that the document is linked to.

3. Choose whether to delete the document.

You can also choose to delete a document from a record to which the document is linked:

1. Search for the document in the tree view under **Documents** or on the **Documents** tab.
2. Select **Delete** from the document's context menu.
3. Choose whether to delete the link between the document and the record or to delete the document and all existing links.

## Mail Merges

Quick campaigns allow you to generate a letter for several persons, without needing to first add a campaign and associated marketing activities etc., >> [Quick Campaigns](#) on page 327.

You can also create mail merges within the scope of marketing activities, >> [Marketing Activities](#) on page 332.

---

**Note:** To send email in a language other than the default languages, you should use UTF-16 encoding for the template documents. For example, to send a mail in Cyrillic, encode the HTML template document in UTF-16.

---

Your administrator can define that you can store the customer data merged with the document template for each recipient. When you open the document, the customer-specific data is merged with the document template and the letter received by the customer is displayed. Document templates are stored as read-only documents in the database and cannot subsequently be edited.

To access a previously sent mail:

1. Switch to a company or person.
2. Switch to the **Document Links** tab. The documents available in Aurea CRM are listed.

You can identify mass mailings as documents that were created by a **Marketing Activity**. The **Serial Letter** and **Read only** check boxes are automatically enabled.

3. Click on the title of the document or select **Check Out & Edit** from the context menu. The document is opens in Microsoft Word.

## Document Templates

### Using Aurea CRM Add-in for Microsoft Word

Aurea CRM Add-in for Microsoft Word allows CRM users to create documents based on templates that meet the corporate customer interaction (CI) guidelines and enrich the documents with content from the CRM.

CRM administrator and users can create template documents that can be used for various recurring tasks. Some of the tasks for different user roles include the following:

- A Sales representative could create and maintain template documents for offer letters, order sheets, e-mail etc. Use the different information in the CRM system to enrich the document.
- Marketing personnel could create new templates to meet the latest customer interaction guidelines. Create templates for marketing campaigns sent by letters or flyers using information from the CRM.
- Service representatives can create solution documents or other documents for different services and use the CRM information in those documents.
- Field service representatives can create service report documents at the customer site along with the current ticket.
- All users can ensure that customers receive information in their preferred language.

---

**Note:** To send email in a language other than the default languages, you should use UTF-16 encoding for the template documents. For example, to send a mail in Cyrillic, encode the HTML template document in UTF-16.

---

- The Aurea CRM word addin supports the following features:
- Allows you to use the same set of methods used by Aurea CRM web.



- Template documents can use fields that are used to store information in Aurea CRM.
- You can generate the documents on CRM.pad using the same templates from Aurea CRM.
- Serial and single letter fields can be easily integrated into the templates using drag and drop features.
- You can create template documents in multiple languages.
- You can create formatted text, when merging documents and mail merge.
- Allows you to embed additional information in the documents like images and pictograms.

## Installing Aurea CRM Add-in for Microsoft Word

The recommended way to install Aurea CRM Word Add-in is to use a network shared location containing the latest installation package. Ask your CRM administrator for the central shared location for the CRM Add-in for Word installation package. Using this process will ensure that the latest version of the CRM Add-in for Word is automatically upgraded to the latest version. You only have to install it once using the shared central location.

If your organization does not provide a shared location, the Aurea CRM add-in for Word installation package can be found on the Aurea CRM customer support site.

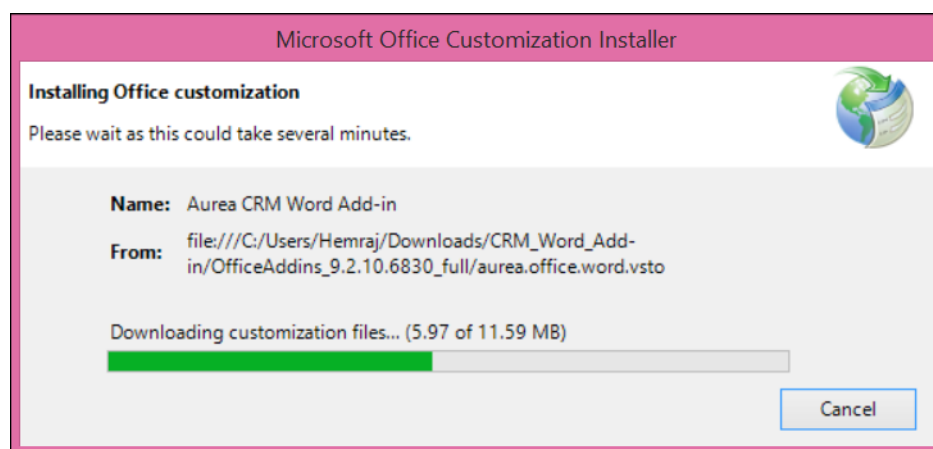
To install the Aurea CRM add-in for Word:

1. Browse to the network shared central location provided by your CRM administrator.

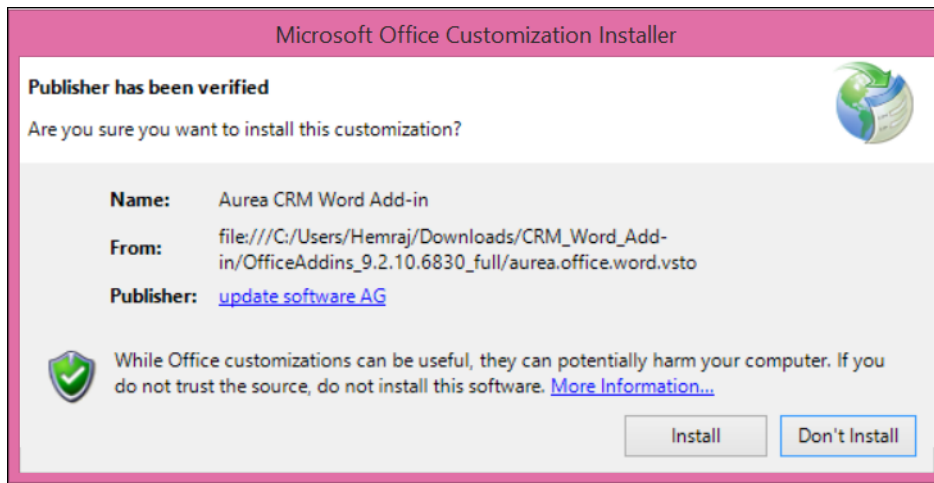
Or

Unzip the package `OfficeAddins_<versionNo>_full.zip`. The `<versionNo>` will be the latest version available on the customer support site.

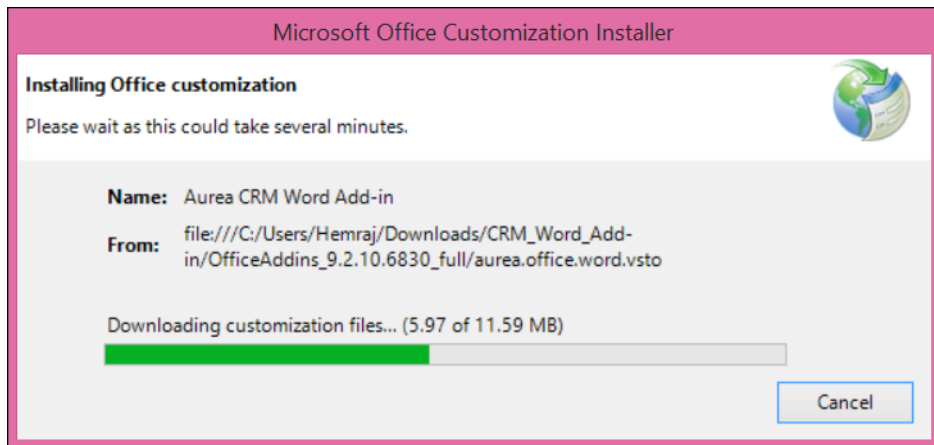
2. Double click `aurea.office.word.vsto` file in the shared location or the unzipped folder. The Microsoft Office Customization Installer window opens.



The installer verifies the publisher, in this case Aurea CRM, and then displays the following window.



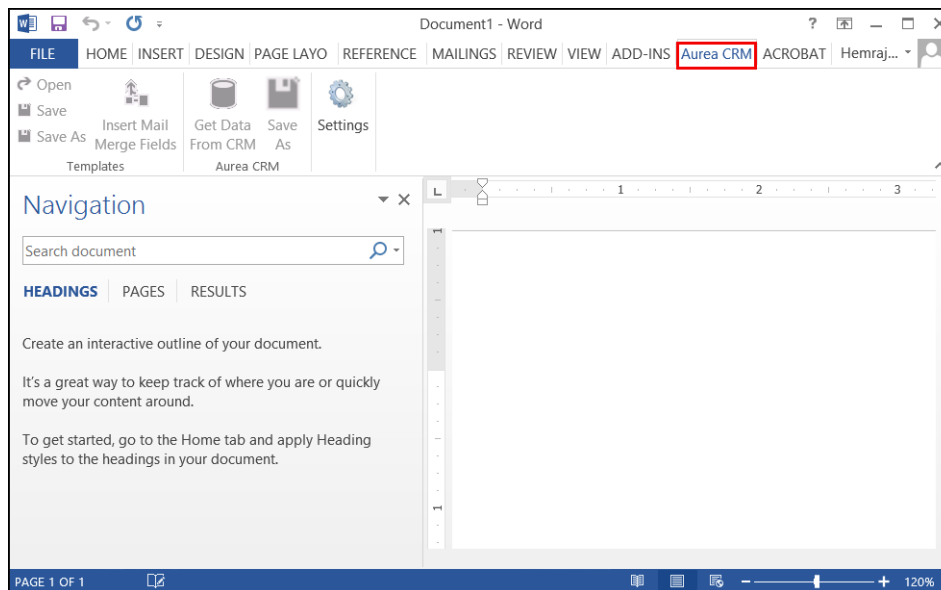
3. Click **Install**. The Installing Office Customization message displays.



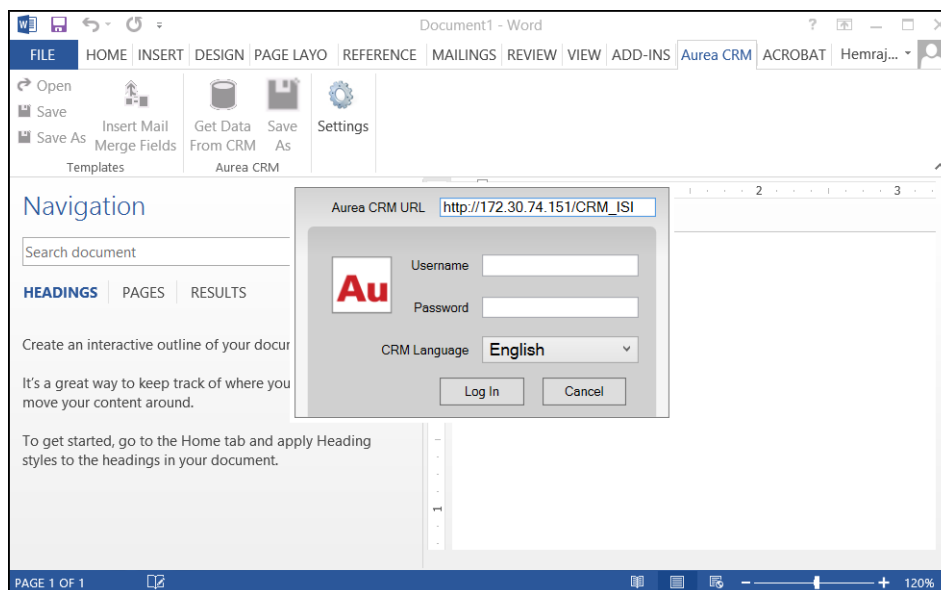
4. The window automatically closes on successful installation.

5. Start Microsoft Word and open a blank document, the **Aurea CRM** menu item should be visible.

6. Click the **Aurea CRM** menu.



7. To work with the plugin you have to be connected to Aurea CRM. Click **Settings** to open the connection dialog.



8. Enter the following details in the connection dialog:
- Enter the URL of the Aurea CRM server.
  - Enter your Username and Password.
  - Select the language you prefer to work on Aurea CRM.
9. Click **Log In**.
10. Now you can use the CRM Word Add-in to create templates for your documents.

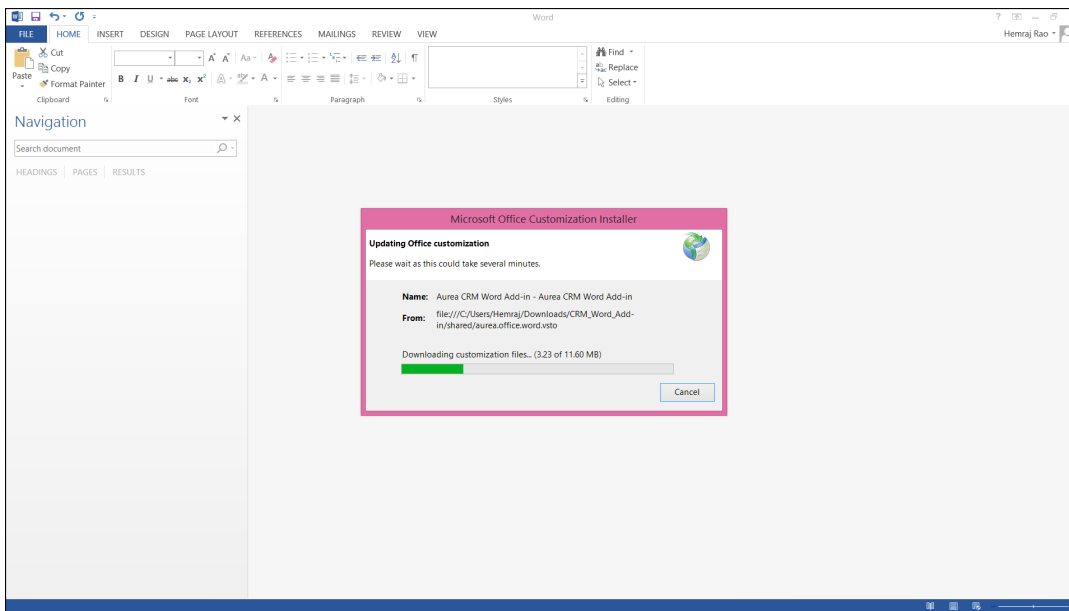
## Upgrading the Aurea CRM Add-in for Microsoft Word

Aurea CRM Add-in for MS Word is developed as a VSTO Add-in. Visual Studio Tools for Office (VSTO) Add-ins use the ClickOnce deployment solution which automatically updates your installation of CRM Add-in for Word. This requires your administrator to publish Aurea CRM Add-in to a network shared central location. You can install the latest version from this location once, all subsequent upgrades will then happen automatically. Publishing a new version to this location will automatically update the CRM Add-in for Word installed from this location. ClickOnce will check this location once in every seven days for new updates.

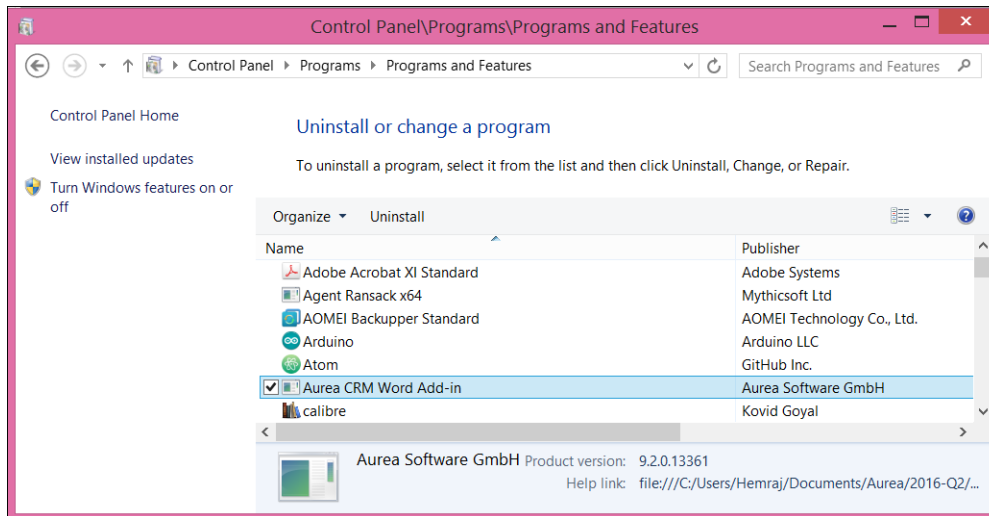
**Note:** If there are multiple users on your machine, then you have to install your own version of CRM Word Add-in. This is a limitation of the ClickOnce solution.

You may have to login to the shared network location to ensure that it is accessible to the ClickOnce installer to check for a new version of the CRM Add-in and perform the upgrade.

If you have used a network shared central location to install CRM Add-in for word, your upgrade should start automatically. If a new version is published to the shared location, on starting MS Word, ClickOnce installer will check the shared folder for a newer version and if a new version is available, it automatically starts the update process.



If you have installed the word plugin using the installer package from the support site, then you have to uninstall the existing Aurea CRM Word Add-in from **Control Panel > Programs > Programs and Features**.



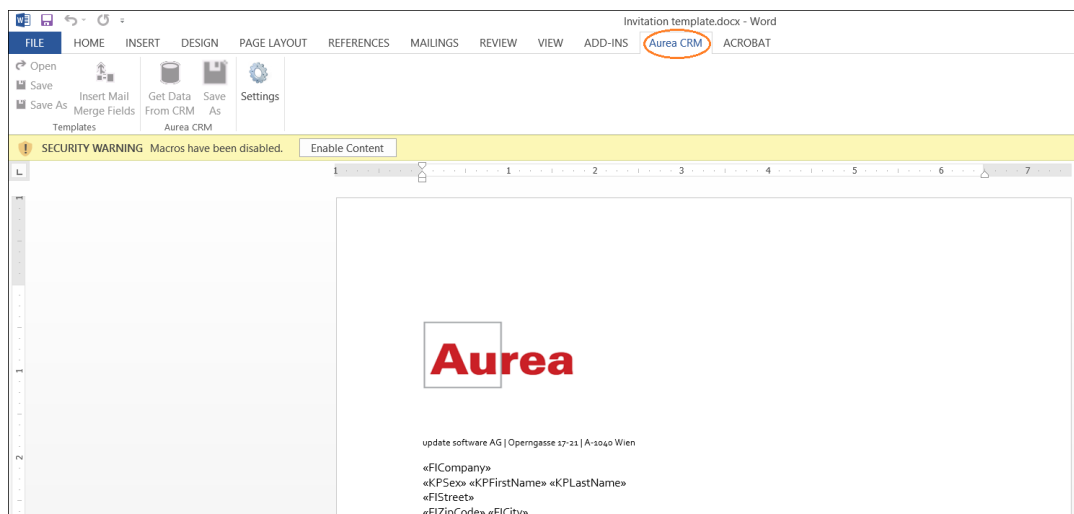
Unzip the package `OfficeAddins_<version no>_release.zip`. The `<version no>` will be the latest version available on the customer support site. Follow the installation instructions in [Installing Aurea CRM Add-in for Microsoft Word](#).

## Creating and Saving new Document Template

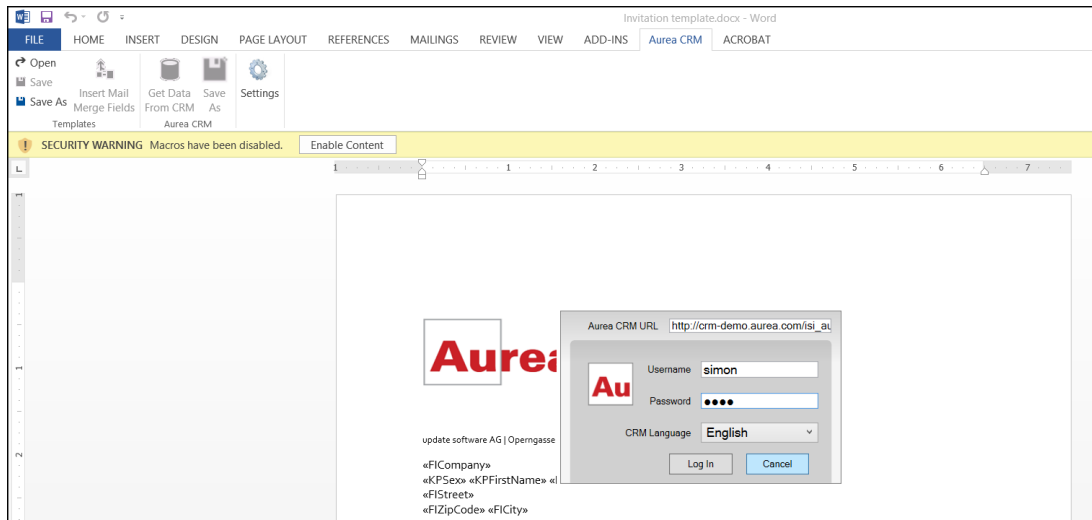
You can create document templates for documents that you regularly use for recurring tasks.

To create a new document template:

1. Open a Microsoft Word document containing basic text.
2. Edit the content of the document.
3. Click on the **Aurea CRM** menu item.



4. Click **Settings** to open the connection dialog.



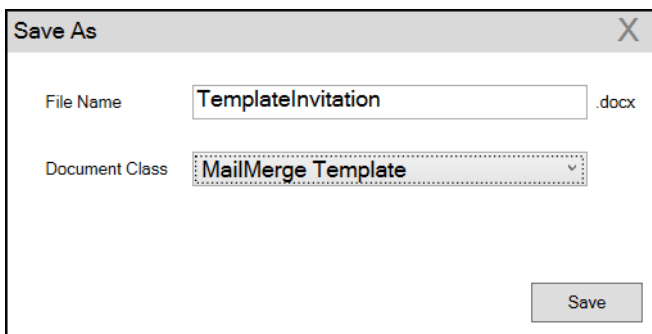
5. Enter the following details in the connection dialog:
  - a. Enter the URL of the Aurea CRM server.
  - b. Enter your Username and Password.
  - c. Select the language you prefer to work on Aurea CRM.
  - d. Click **Log In**.

---

**Note:** None of the other Aurea CRM sub-menu items are activated until you login.

---

6. Click **Save As** to open the dialog.
  - a. Give a **File Name** for the template.
  - b. Select the **Document Class** of the template, from the following options:
    - **MailMerge Template**
    - **Template (BASE)**



In this case, we save the template document as a **MailMerge Template** class.

---

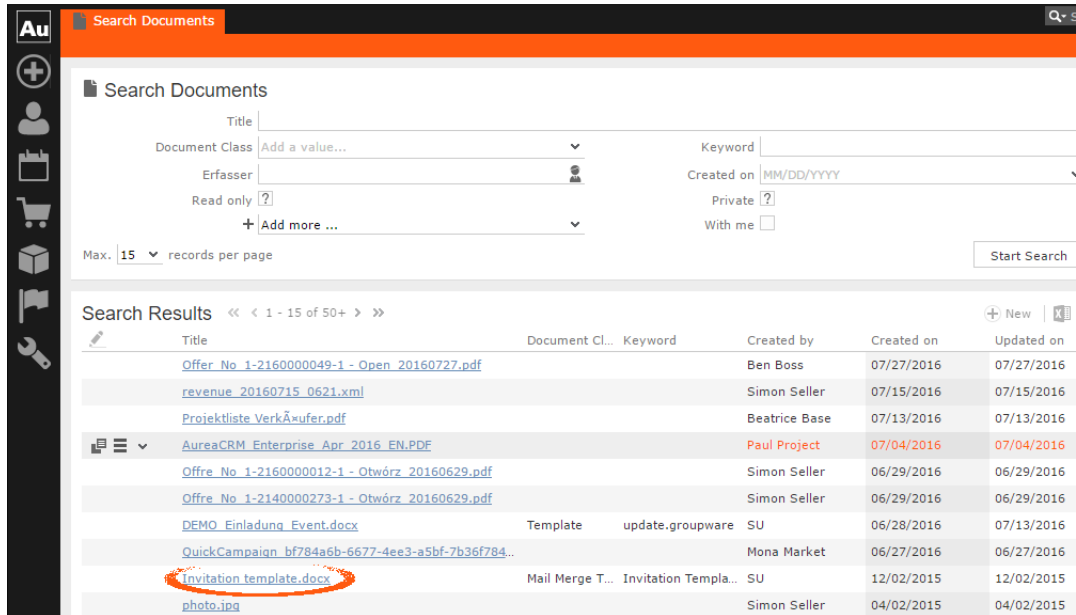
**Note:** The document class is drawn from the CRM, therefore the drop-down values can be different based on your installation.

---

7. Click **Save**. The template document is saved to the D1 infoarea of the Aurea CRM server.

**Note:** After a template is saved to Aurea CRM, the **Insert Mail Merge Fields** menu item is activated.

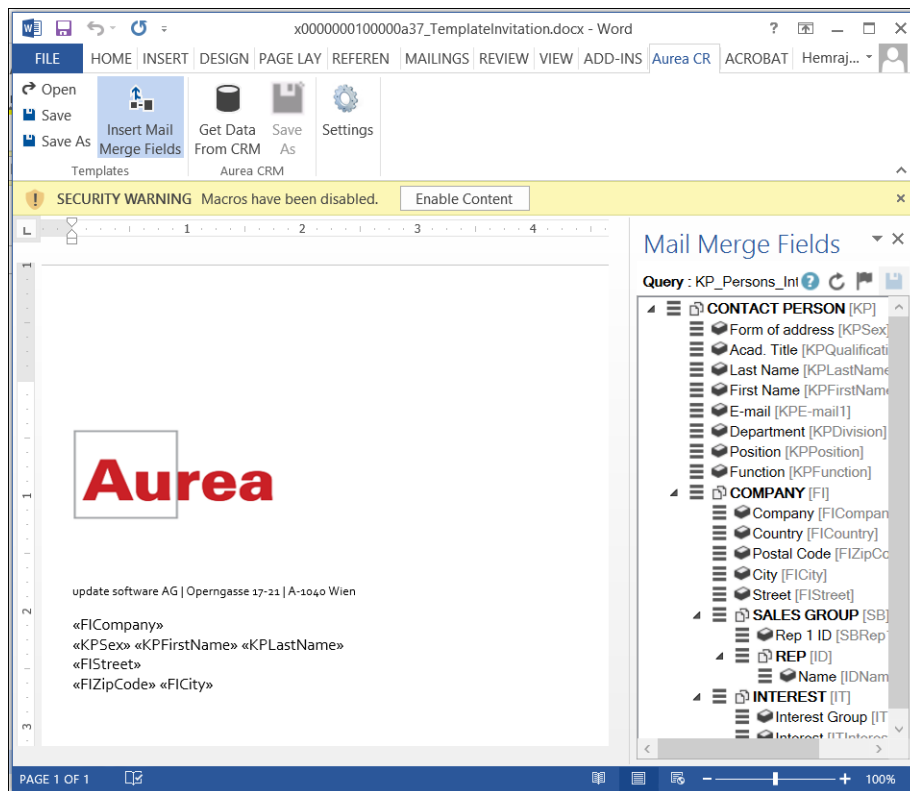
8. Login to the Aurea CRM server with the same username and password and search for the document. The saved document should be visible in the search list as shown in the screenshot below:



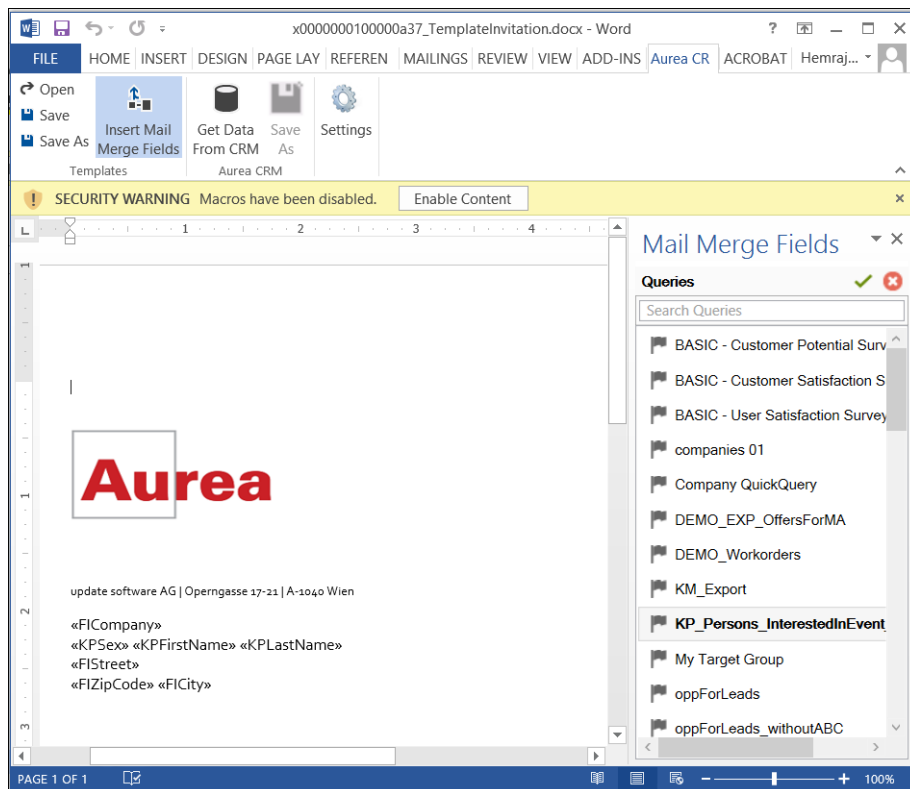
The screenshot shows the 'Search Documents' interface in Aurea CRM. The search results table is as follows:

Title	Document Cl.	Keyword	Created by	Created on	Updated on
<a href="#">Offer No 1-2160000049-1 - Open 20160727.pdf</a>			Ben Boss	07/27/2016	07/27/2016
<a href="#">revenue 20160715_0621.xml</a>			Simon Seller	07/15/2016	07/15/2016
<a href="#">Projektliste VerkÄufer.pdf</a>			Beatrice Base	07/13/2016	07/13/2016
<a href="#">AureaCRM Enterprise Apr 2016 EN.PDF</a>			Paul Project	07/04/2016	07/04/2016
<a href="#">Offre No 1-2160000012-1 - Otwórz 20160629.pdf</a>			Simon Seller	06/29/2016	06/29/2016
<a href="#">Offre No 1-2140000273-1 - Otwórz 20160629.pdf</a>			Simon Seller	06/29/2016	06/29/2016
<a href="#">DEMO Einladunq Event.docx</a>	Template	update.groupware	SU	06/28/2016	07/13/2016
<a href="#">QuickCampaign bf784a6b-6677-4ee3-a5bf-7b36f784...</a>			Mona Market	06/27/2016	06/27/2016
<a href="#">Invitation template.docx</a>	Mail Merge T...	Invitation Templa...	SU	12/02/2015	12/02/2015
<a href="#">photo.jpg</a>			Simon Seller	04/02/2015	04/02/2015

9. Click **Insert Mail Merge Fields**, to update the document with information from the records on Aurea CRM server. The **Mail Merge Fields** column displays.



10. Click **Queries** (  ) to list existing queries.

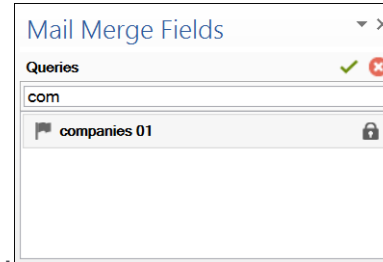


11. You can create a new query by selecting an existing query then modifying, and saving it.



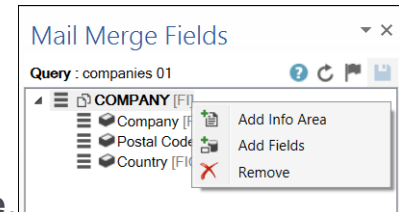
To create a new query, perform the following:

- a. Select any query or record and click . In the following screenshot, typing **com**

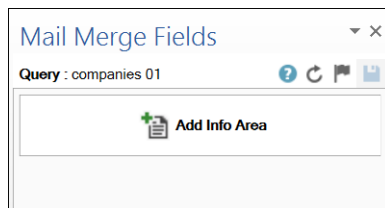


in the filters text box shows **companies 01**.

- b. Right click on the root record node and select **Remove**.

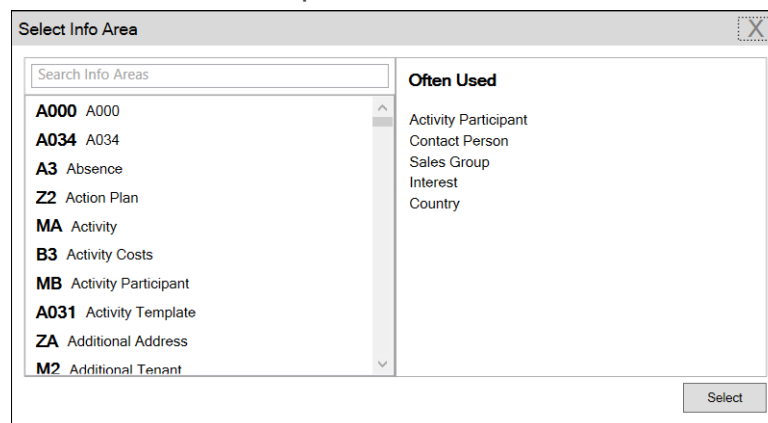


This will create a blank query, as shown in the screenshot below.



low.

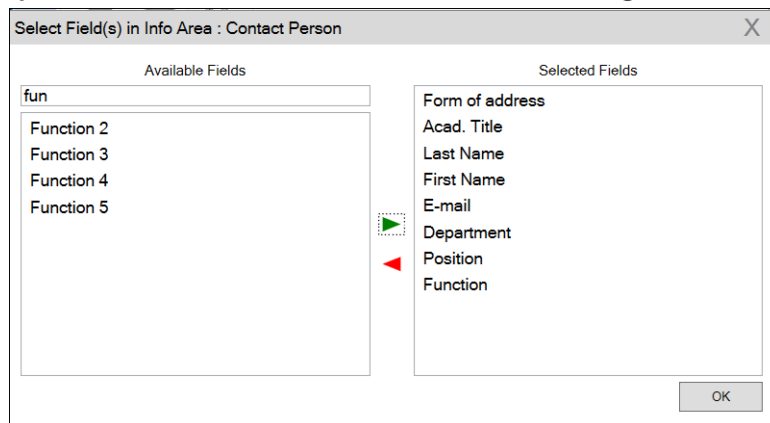
- c. Click **Add Info Area** to open the **Select info Area**



dialog.

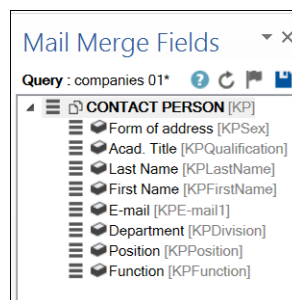
- d. Select the infoarea of interest and select the required fields from that info area. For this example, type KP and select the **Contact Person** info area. The **Select**

### Field(s) in Info Area: Contact Person dialog box



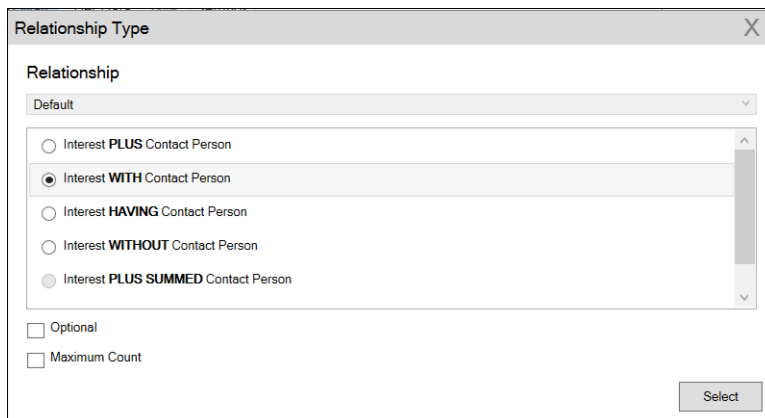
opens.

- e. Select the required fields in the **Available Fields** pane and click **▶** to move it to the **Selected Fields** pane. Click **OK**. The selected infoarea and fields are



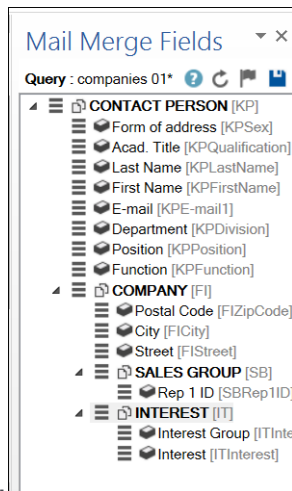
displayed in the Mail Merge Fields.

- f. To add more info areas, right click on an infoarea and select **Add Info area**. Selecting the infoarea opens a Relationships dialog. You can define the type of relationship between the existing infoarea and the new one you



add.

- g. Select the required fields from for the new infoarea. The following screenshot shows the **Mail Merge Fields** with the selected info areas and



parameters.

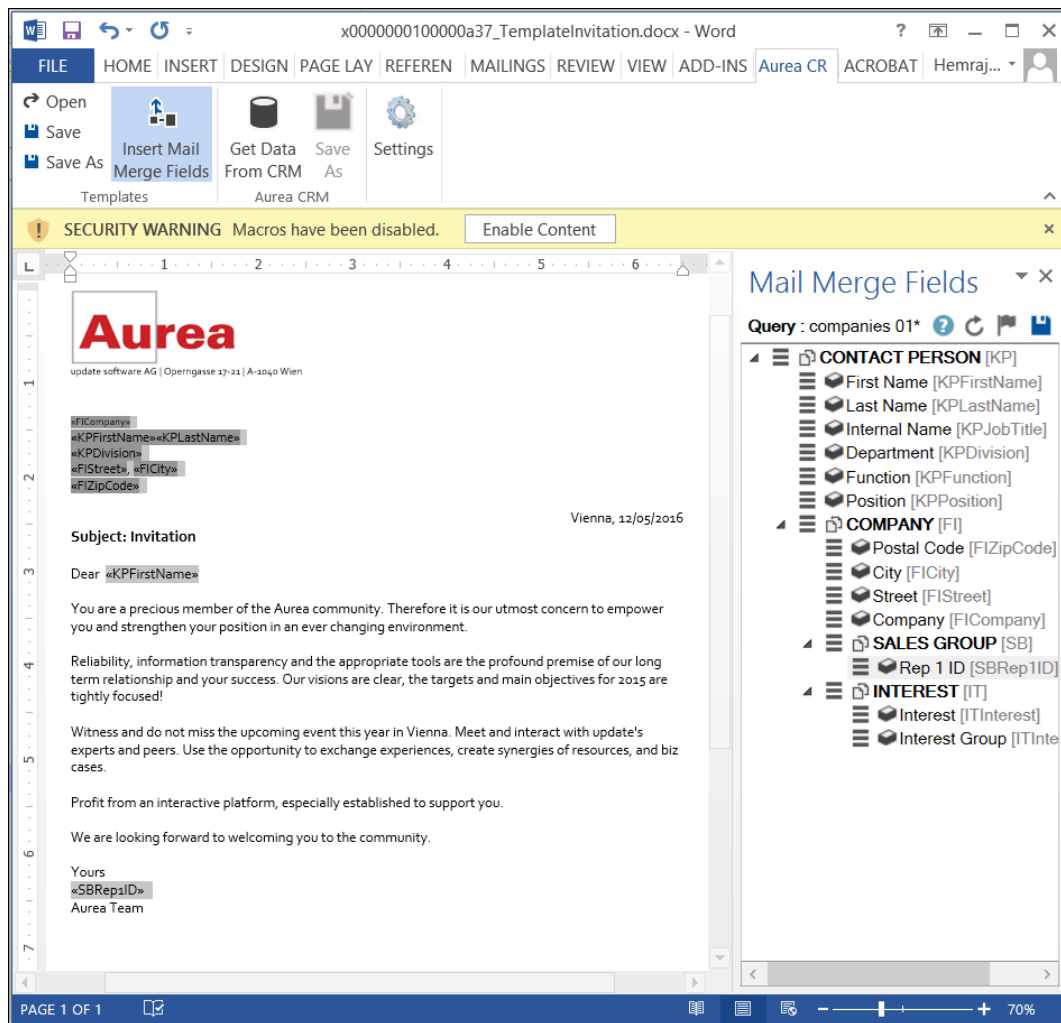
- h. Click  to save the modified query.

---

**Note:** This will overwrite the before selected query and the changes will be done in the CRM solution. Please ensure that the query can be modified to your requirements to avoid conflicts with queries set up by other users.

---

12. To populate the template document with the fields from infoarea records, drag and drop the fields in the required places. The following screenshot shows the template document enriched with fields.



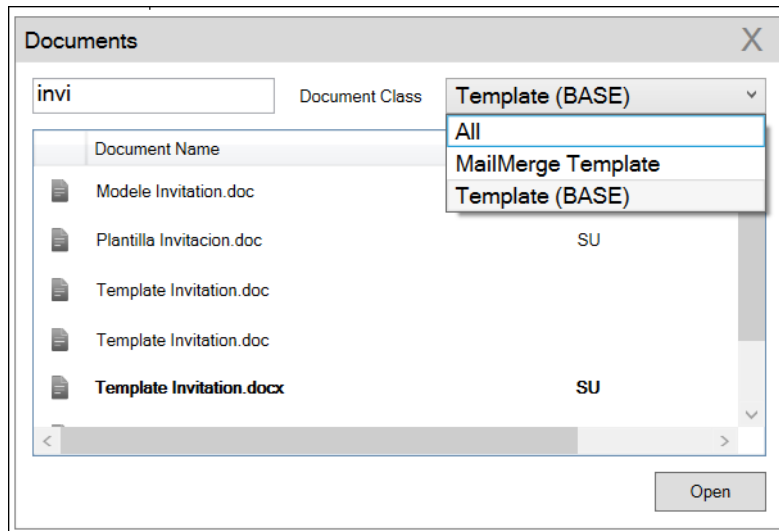
13. Click **Save**. The template document will be saved to the D1 infoarea on Aurea CRM server.

## Opening and Editing document templates

You can open an existing template and edit and save it. You can also rename it and save it with a different template name.

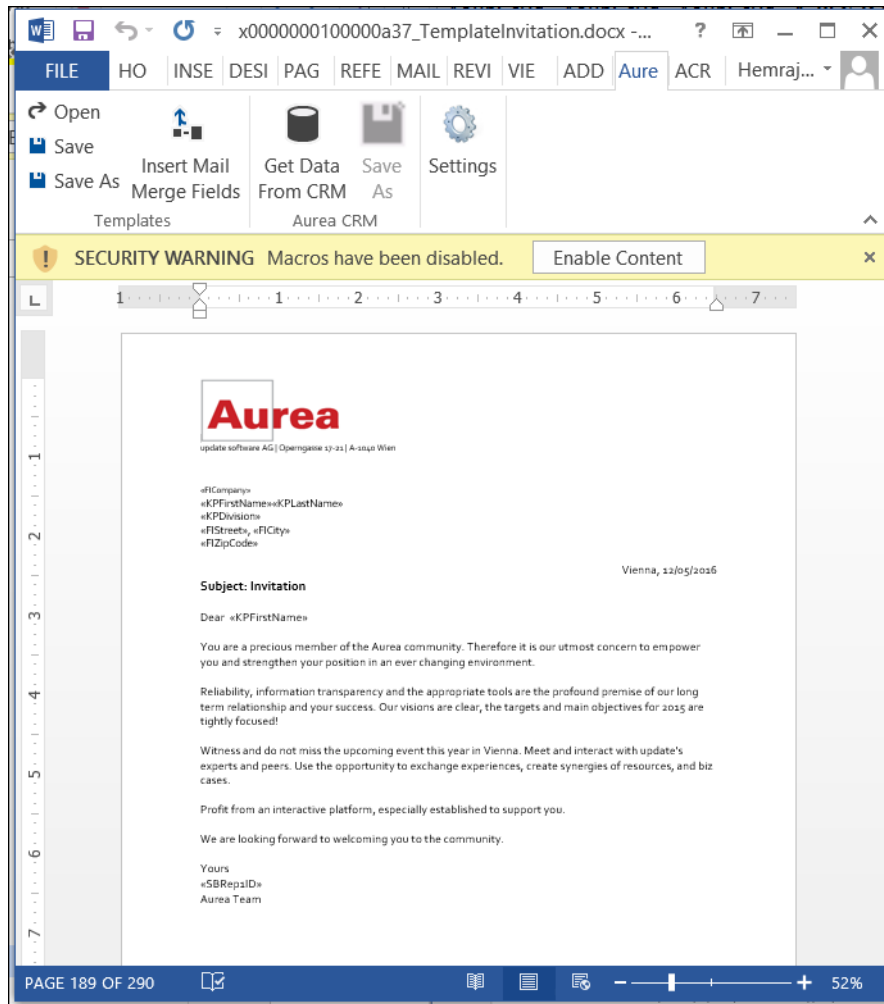
To open an existing template:

1. In the Microsoft Word, click on the **Aurea CRM** menu item.
2. Click **Settings**, and login to the Aurea CRM server.
3. Click **Open**. The **Documents** dialog is displayed.

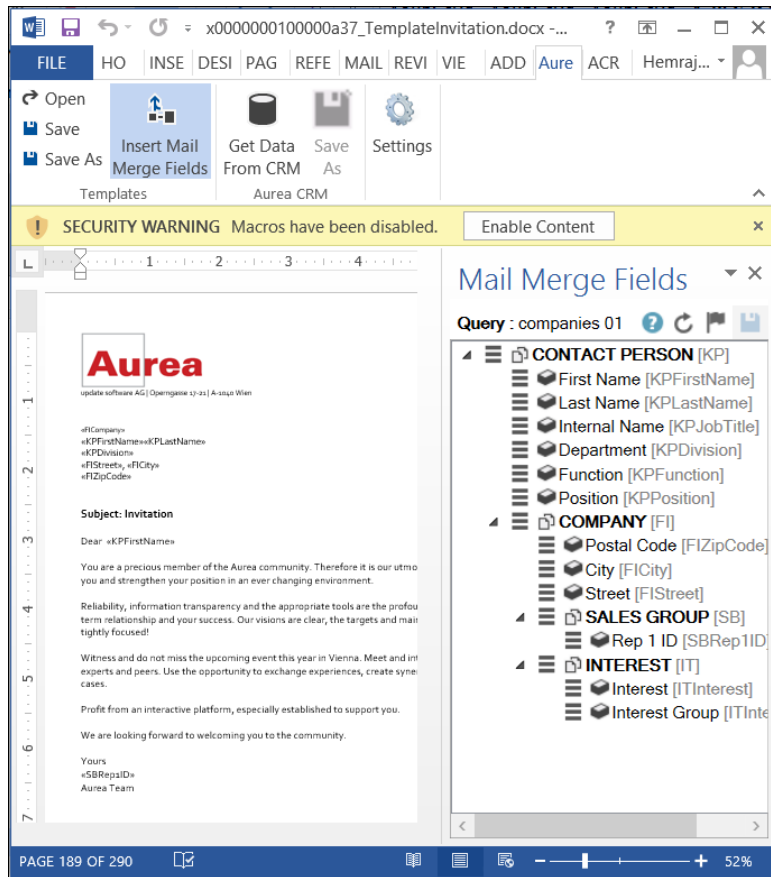


You can type in the text box to filter for a specific document. You can also select the name of the template document. In the screenshot above, **Template (BASE)** was the document class selected and **invi** was typed in the filter text box, to find the **Template Invitation.docx** template.

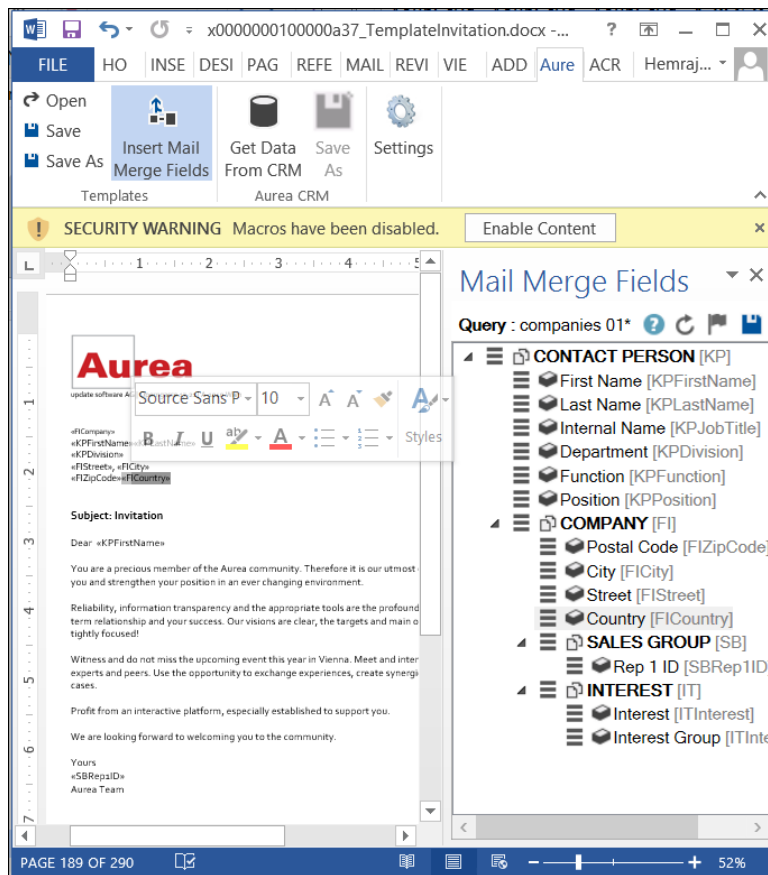
4. The selected template document is retrieved from the Server and loaded into Microsoft Word. For example, the screenshot below shows the **Template Invitation.docx**.



5. You can edit the template document and make modifications. For example, in the Invitation template.docx, you might want to add the country name, after the City name.
6. Click Insert Mail Merge Fields. The Mail Merge Fields column displaying the fields from the selected infoarea is displayed to the right of the editing pane. See the screenshot below.



- To add a field from the infoarea to the template document, select the field and drag and drop it in the document at the appropriate position. For example, the Country field was selected and added to the document. See the screenshot below.



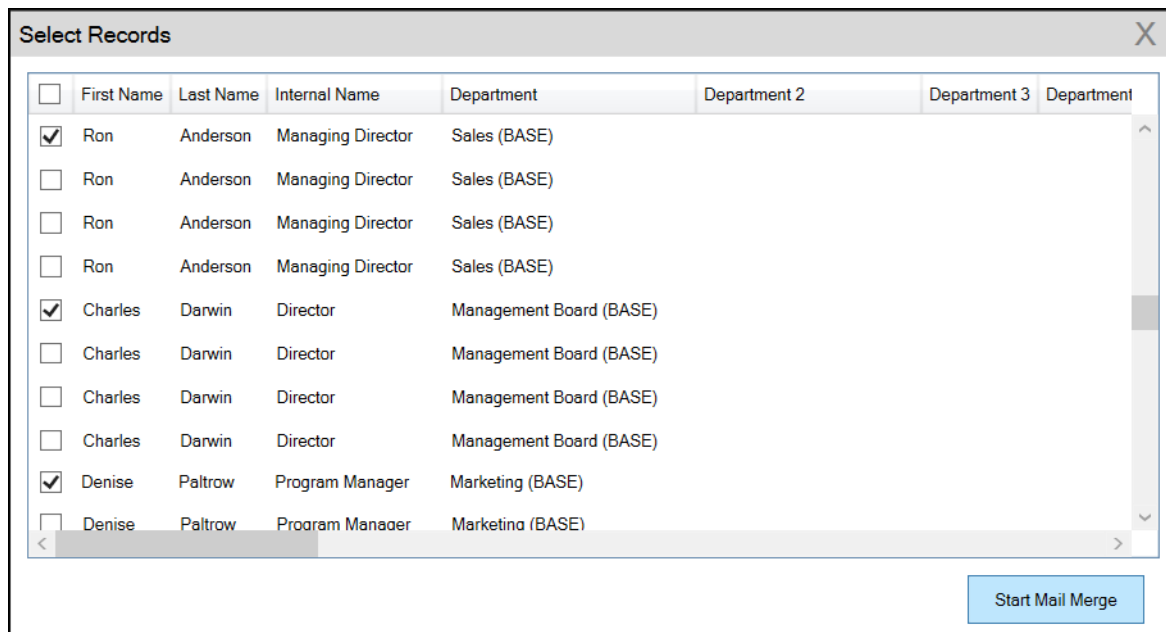
8. Click **Save**. The template document is saved to the D1 area of Aurea CRM.

## Mail Merge Using Document Templates

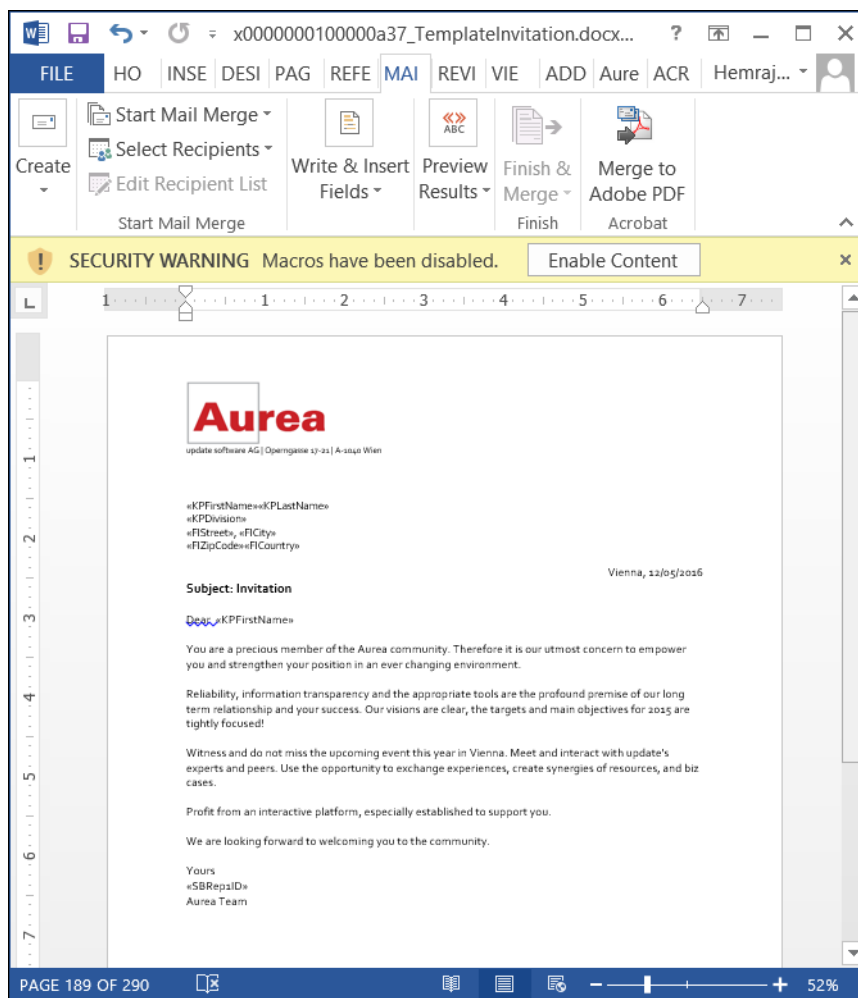
To generate a document for several persons using the document template:

1. From the Aurea CRM menu, login to the CRM server and open the Mail Merge template document. Edit the template document if necessary. For more information, see >> Opening and Editing document templates.
2. Click **Get Data From CRM**. The Select Records dialog displays single record or a list of records, showing the data fields you selected. You can then select the data you want use with the document template.

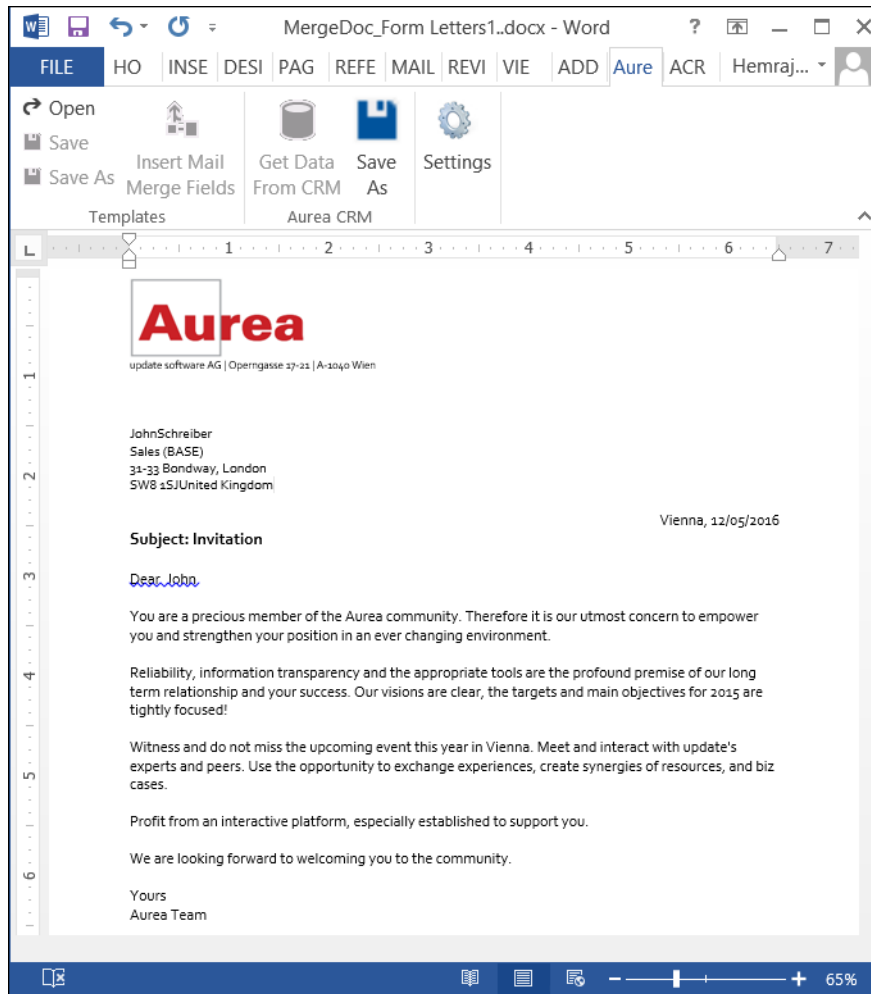




3. Click **Start Mail Merge**. The document is opened in a new Window.



- To see the individual documents populated with the field values, select the required recipient from the **Preview Results** menu. The document is populated with the required information. The following screenshot shows the merged fields with their values populated and highlighted.



- You can work with the documents created from the Aurea CRM server. The following screenshot shows the **Invitation template.docx** template document on the CRM server.

The screenshot shows the 'Search Documents' interface in Aurea CRM. The search criteria are: Title (empty), Document Class (Add a value...), Erfasser (empty), Read only (checked), Keyword (empty), Created on (MM/DD/YYYY), Private (checked), and With me (unchecked). The search results table is as follows:

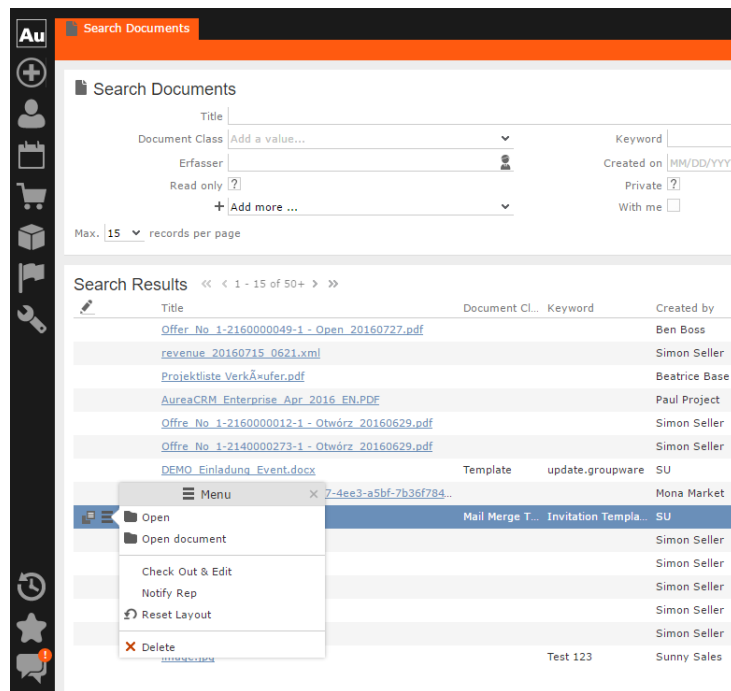
Title	Document Cl...	Keyword	Created by	Created on	Updated on
<a href="#">Offer No 1-2160000049-1 - Open 20160727.pdf</a>			Ben Boss	07/27/2016	07/27/2016
<a href="#">revenue 20160715_0621.xml</a>			Simon Seller	07/15/2016	07/15/2016
<a href="#">Projektliste Verkaufser.pdf</a>			Beatrice Base	07/13/2016	07/13/2016
<a href="#">AureaCRM Enterprise Apr 2016 EN.PDF</a>			Paul Project	07/04/2016	07/04/2016
<a href="#">Offre No 1-2160000012-1 - Otwórz 20160629.pdf</a>			Simon Seller	06/29/2016	06/29/2016
<a href="#">Offre No 1-2140000273-1 - Otwórz 20160629.pdf</a>			Simon Seller	06/29/2016	06/29/2016
<a href="#">DEMO Einladunq Event.docx</a>	Template	update.groupware	SU	06/28/2016	07/13/2016
<a href="#">QuickCampaign bf784a6b-6677-4ee3-a5bf-7b36f784...</a>			Mona Market	06/27/2016	06/27/2016
<a href="#">Invitation template.docx</a>	Mail Merge T...	Invitation Templa...	SU	12/02/2015	12/02/2015
<a href="#">photo.jpg</a>			Simon Seller	04/02/2015	04/02/2015

## Deleting a Template Document

You can delete a template document from the CRM server. This will delete the template document along with all linked information in Aurea CRM and the D1 in-foarea.

To delete a template document:

1. Search for your documents in Aurea CRM using **Colloborate > Documents** menu option.
2. Open the required document from the search results.
3. Select the **Delete** option from the context menu for the document.



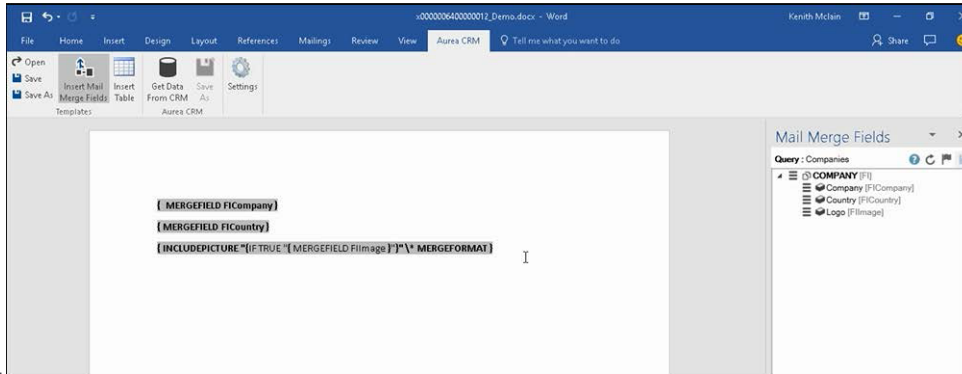
## Working with Images in the Template Document

You can add images and then modify them in the template document. The following steps show a sample of adding an image to the template document and modifying then making some modifications to the image. You will be using the standard functions available in Microsoft Word to process an image, like resizing and adding borders.


Perform the following steps:

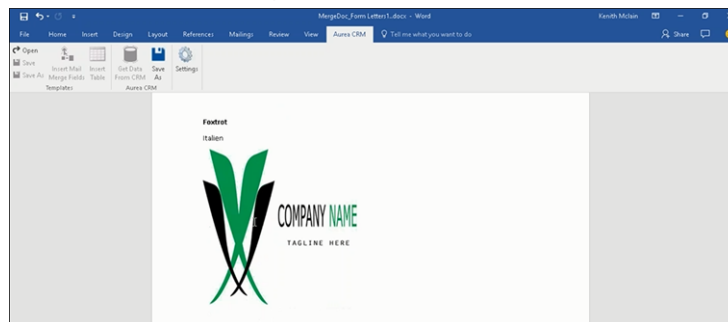
1. Create a new blank template document. Perform steps 1 to 11 in the topic [Creating and Saving new Document Template](#) on page 273. In step eleven you have to create a query that will retrieve the fields from the infoarea that has the images you require. For this example steps, we have created a simple query to retrieve the Company infoarea records that has the Logo field containing images of company logos (F1Image), the name of the company (F1Company), and the country (F1Country) it is located in.
2. Add the three fields the company name, country, and logo fields to the template document. The Word add-in automatically detects that the added field is an image

field and adds the appropriate code, see the screenshot



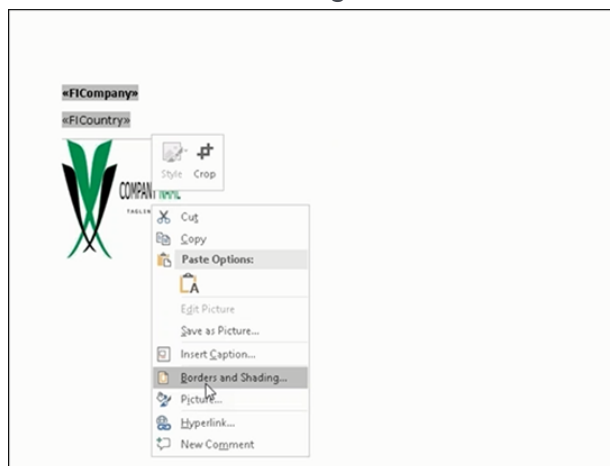
below.

- Format the fields to the desired fonts, bold it and other changes you desire, as you would a normal a normal word document.
- Click  to execute the mail merge. This will fetch the data, populate the record field and create the pages for each record set in the CRM database. The screenshot below shows one of the pages



generated.

- To resize the displayed image switch to the template document and click on the logo record, a sample image is displayed, resize it as you would resize an image in a word document.
- To add a border, right click on the image in the template document and select Borders and Shadings as shown in the screenshot below.



- 7. Add a border using the standard Borders dialog in MS Word.
- 8. Click to execute Mail Merge again. The resulting document is shown in the



## Adding Tables to a Template Document

Aurea CRM add-in for Microsoft Word provides an Insert Table feature that allows you to create a hierarchical grouping of records.

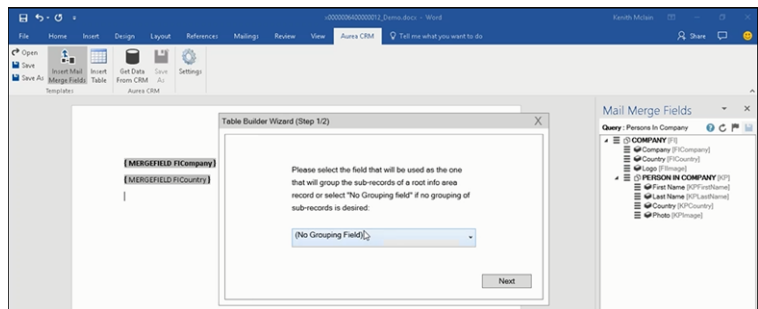
For example, if you want to group all the employees of a company into separate documents, you have to use the **Insert Table** feature. If you have two companies and three employees in each company then a simple mail merge would create six pages containing the company name and one employee name. If you use the Insert Table feature then the result document will contain two pages for the two companies and all the employees of a company grouped in a single page.

The sample table created in the procedure described below uses a query to retrieve a company along with the employees of the company.

Perform the following steps:

- 1. Create a new blank template document. Perform steps 1 to 11 in the topic, [Creating and Saving new Document Template](#) on page 273. In step 11, you have to create a query that will retrieve the fields from the infoarea that has the information that you want to tabulate. For this example steps, we have created a complex query to retrieve the Company infoarea records along with its employee information.
- 2. From the Mail Merge Fields add the Company name and the Country fields to the template document.
- 3. Click Insert Table.

The Table Builder Wizard (Step1/2) dialog displays. See the screenshot below.



4. You can add tables to the template document based on a grouping field or without a grouping field. A grouping field groups the sub-records of a selected parent record.

To add a table based on a grouping field, go to step 5.

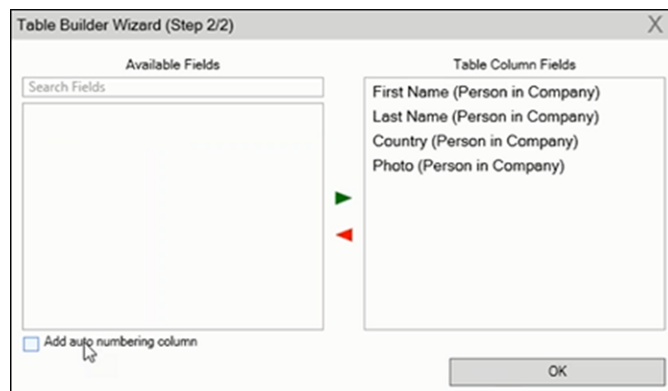
To add a table without grouping fields, perform the following steps:

- a. Click Next. The Table Builder Wizard (Step 2/2) dialog



displays.

- b. The Available Fields pane in the dialog displays the records that you can add to your table.
- c. Select the records that you want to add to your table and click to select the required records. The selected records are added to the Table Column Fields



pane.

- d. Click **Add auto numbering column** to add the numbering column for all the employees that get populated for each company in the result documents.

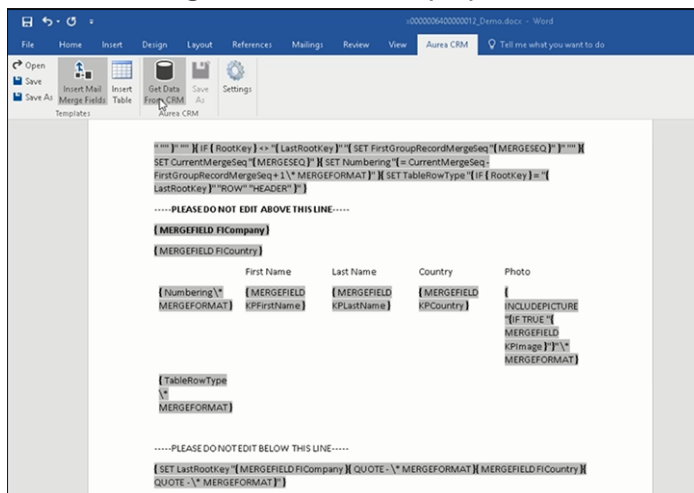
---

**Note:** The numbering re-starts for each separate table (hierarchical group) created in the result document.

---

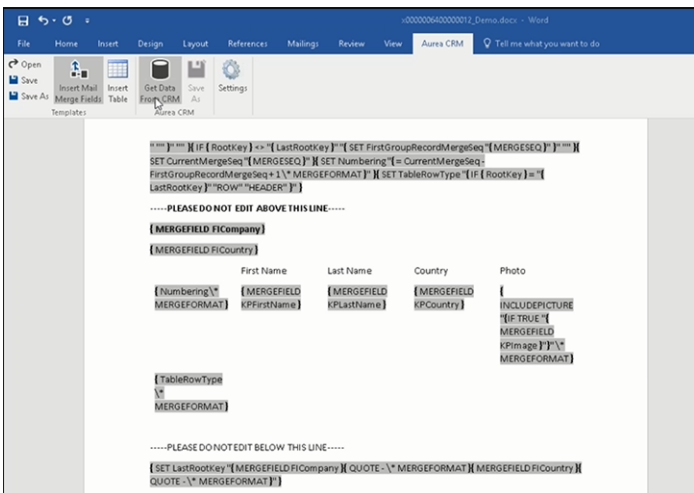
- e. Click OK.

f. The required code is generated and populated in the template



document.

g. Click  to execute the mail merge. The Select Records dialog is





displayed.

h. Click **Start Mail Merge**.

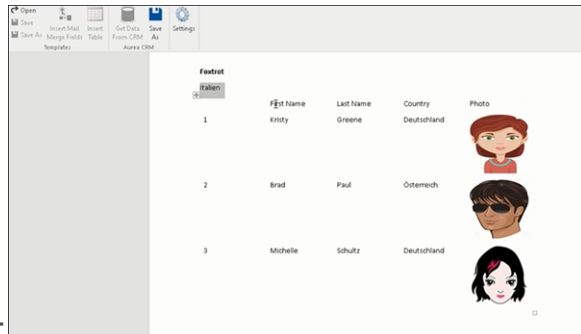





i. The results documents are created. Sample pages containing the tables for

	First Name	Last Name	Country	Photo
1	Lucia	Parker	Italien	
2	Freddie	Lambert	Deutschland	

companies are shown below.

Another



	First Name	Last Name	Country	Photo
1	Kristy	Greene	Deutschland	
2	Brad	Paul	Osterreich	
3	Michelle	Schultz	Deutschland	

page:

j. You can add formatting to the table by selecting the table format in the template document and add the required formatting.

k. To format the table, go to the template document, right click the table and select

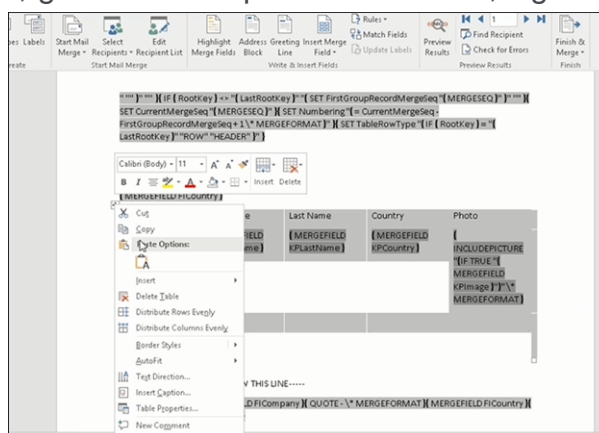
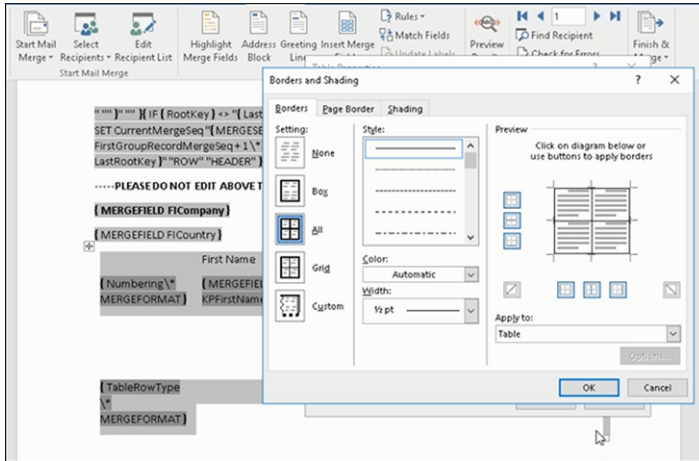


Table Properties.

- l. In this example, we will set the borders to the table. See the screenshot below for the **Table properties > Borders and Shading** dialog.



- m. In this example, we apply a simple formatting to the table. All borders to the

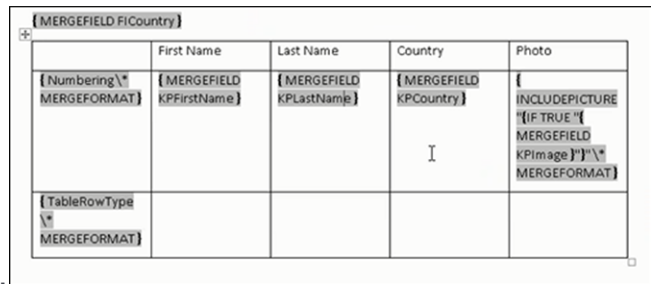
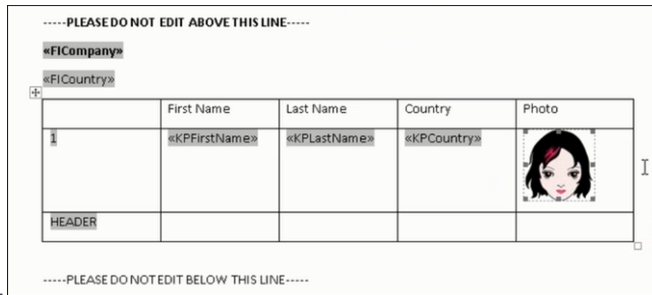


table grid. See the screenshot below.



- n. You can resize the image. Click the image record in the table and resize the image visible in the table cell. See the screenshot



below.

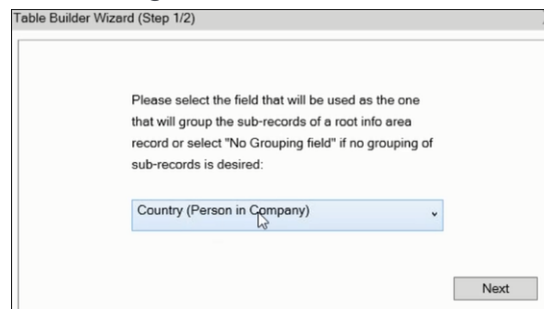
- o. To see the result of resizing, click  to start the mail merge. A result page is shown in the screenshot below. The images are displayed in the size specified

Contoso  
Österreich

	First Name	Last Name	Country	Photo
1	Lucia	Parker	Italien	
2	Freddie	Lambert	Deutschland	

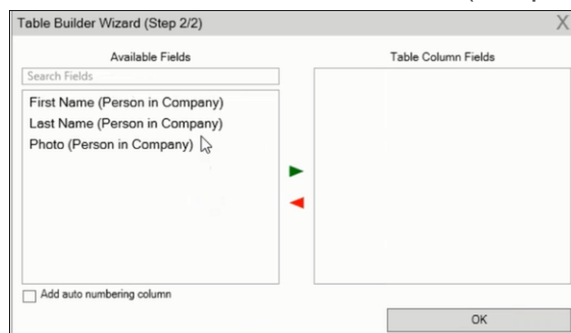
in the template document. This completes the steps required to generate documents without using a grouping field.

5. To create a template document using a grouping field, perform the following steps:
  - a. Select a grouping field. The following screenshot shows the Country (Person



in Company) field selected.

- b. Click Next. The Table Builder Wizard (Step 2/2) dialog



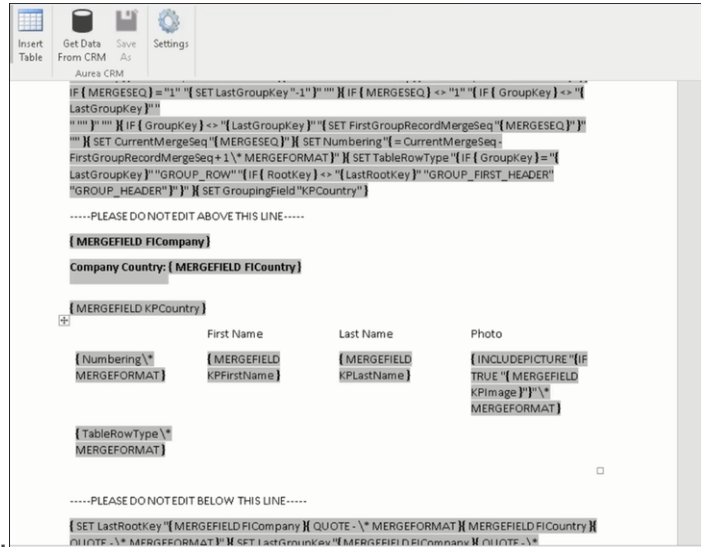
displays.

**Note:** Note: This grouping fields does not show Company record in the available fields as it is not a sub-record of the selected grouping field, Country (Person in Company) field.

- c. Select the records you want to add to the table columns and click ► to add the records to the Table Column Fields. Click OK.

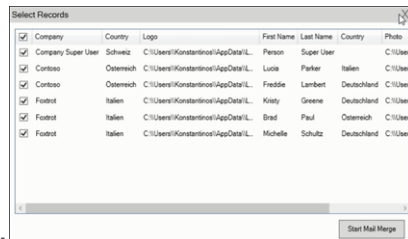
The table wizard generated the required code in the template document.

d. Add the Company name and the Company Country records to the template



document. See the screenshot below.

e. Click to execute the mail merge. The Select Record dialog displays. See the

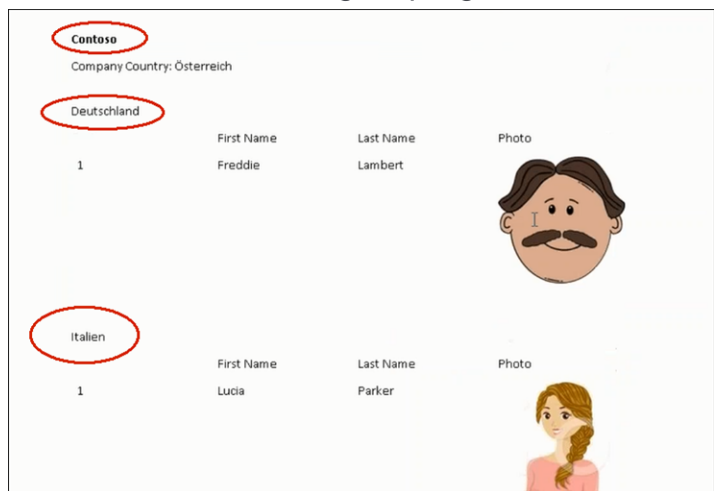


screenshot below.

f. Click Start Mail Merge to generate the result document.

The result document contains three tables for each company, based on the country of the employee (grouping field), which are three countries.

The following screenshot shows the result document showing the employee tables for the company “Contoso” in two tables for the grouping in terms of



countries: Deutschland and Italien.

6. Click **Save As** to save the template document. The **Save As** dialog displays.

A default name in the following format is automatically displayed, <document-Name\_<date>\_<user name>. In the screenshot above the default name is <Demo>\_<2016-12-21>\_<SU>.

7. Click **Save**. The template document is saved to the D1 infoarea of the Aurea CRM server.

# 6

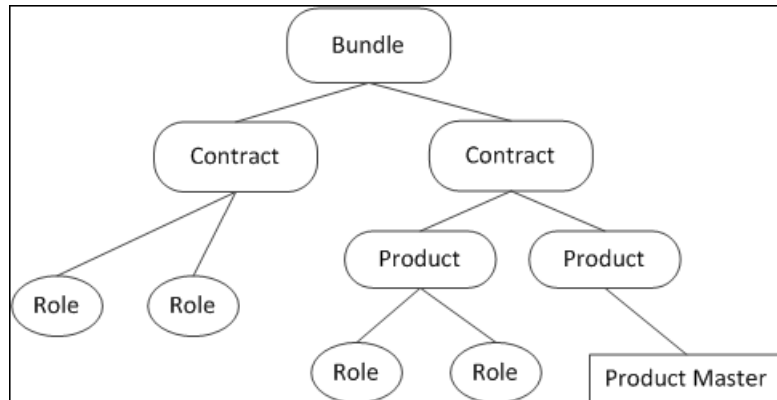
## Products and Contracts – FSI

You can store information on customers' products and contracts in Aurea CRM and manage these products.

Customers can take on various roles depending on the product, e.g. account holder, guarantor, beneficiary etc.

Various products can be combined to form contracts, and various contracts can be bundled to depict complex financial products.

The following diagram illustrates the relationships between products, contracts and bundles:



You can:

- Manage items in the **Product Master** info area and transfer product data to other info areas, see [Product Master](#) on page 299.
- Add customers' products, e.g. accounts, loans, services, securities, insurance policies, assets, see [Product Groups](#) on page 301.
- Create risk profiles for securities according to MiFID, see [MiFID](#) on page 305.
- Display an overview of a customer's products, see [Product Overview](#) on page 307.
- Enter customers' roles for various products (e.g. beneficiary), see [Roles](#) on page 308.
- Group products into contracts and group contracts into bundles, see [Contracts and Bundles](#) on page 309.

**Example:**

A customer has multiple insurance policies that are grouped together in a bundle for business and legal purposes. The contracts themselves consist of various products. For example, the "Family security" bundle consists of an endowment policy and an indemnity insurance policy. The endowment policy in turn consists of a life insurance policy and vocational disability insurance policy. Various roles can be defined for bundles, contracts and products. The endowment policy thus has a policy holder and a contributor, the life insurance also includes a beneficiary who benefits in the case of death.


## Product Master

The product master stores information on products (e.g. loans, insurance policies), services and securities.

The screenshot displays the 'Product Master Apartment' interface. At the top, it shows the product name 'Jangly Bells', product number '23424', and product group 'Property'. Below this, there are fields for 'Sub-product group' (Apartment), 'Product partner', and 'Synonym'. The 'Data source' is set to 'Own' and 'Asset class' is also visible. The interface includes a 'Product info U...' section with fields for 'Maturity', 'Unit Year(s)', 'Period of notice...', 'Costs/fees', 'Total amount', 'Risk class', 'Valid from', 'Valid to', 'Consultation ...', and 'Relevant for c...' (with a checkbox). The 'Created by' field is 'Andy Admin'. There are tabs for 'Finance', 'Criteria', and 'MiFID'. Below these are various input fields and sliders for 'Expenses %', 'Currency EUR', 'Effective inter...', 'Minimum inve...', 'Payment terms', 'Incremental p...', 'Expenses fixed', 'Yield', 'Duration in m...', 'Disposal', 'Amount of sec...', 'Dynamic inter...', 'Expenses mini...', 'Interest paym...', 'Minimum cont...', 'Premium/Bonus', and 'Incremental p...'. At the bottom, there are tabs for 'Product Descriptions', 'Mandatory Documents', 'Documents', and 'Customers with this Product'.


Each product in the product master is uniquely identified by its **Product No.**

The **Product Group** and **Sub-product group** fields access catalogs. The **Sub-product group** catalog is a child catalog of the **Product Group** catalog. If you enter a product group in the **Product Group** field, only the products in that product group can be selected in the **Sub-product group** field.

Other info areas can access information stored in the **Product Master** info area, e.g. when adding loans or insurance policies for a customer. Click on  (**Select**) next to the **Product Master** field in these info areas to select the desired product. Data in the product master (e.g. **Product Name**, **Product Group** etc.) is transferred to the relevant info area.

**Note:** Your administrator is responsible for maintaining the product master, see [Adding Products to the Product Master](#) on page 300.



Select  (**Sales**) > **Product Master** to display an overview of all products stored in the system. Products are color-code according to the vendor (green = your products, yellow = partner products, red = third-party products).

## Adding Products to the Product Master


---

**Note:** You require administrator rights to add products to the product master.

---

To add a new product to the product master:



1. Select  (**Sales**) > **Product Master**.
2. Start the search and click on **+** (**New**).
3. Enter data such as the **Product Name**, **Product No.**, **Product Group**, **Sub-product group** etc.
4. Enter additional data, e.g. the **Currency**, on the various tabs.
5. Save the record.

## Product Descriptions


---

**Note:** You require administrator rights to add product descriptions.

---

To add a product description:



1. Select  (**Sales**) > **Product Master**.
2. Search for the desired product and open the record.
3. Click on **+** (**New**) on the **Product Descriptions** tab.
4. Select the description's **Language**.  
If you do not select a language, the description applies to all languages for which no description has been entered.
5. Enter a **Description** (for the customer) and, if necessary, an **Internal Description**.

**Note:** When adding product records (in the **Account**, **Loan**, **Security** etc. info areas), the product description is transferred to the **Description** field in the product record (in the language selected in the **Language** field).

---

## Adding Products to the Product Master

---



**Note:** You require administrator rights to add products to the product master.

---



---

To add a new product to the product master:

1. Select  (**Sales**) > **Product Master**.
2. Start the search and click on  (**New**).
3. Enter data such as the **Product Name**, **Product No.**, **Product Group**, **Sub-product group** etc.
4. Enter additional data, e.g. the **Currency**, on the various tabs.
5. Save the record.



## Product Descriptions

---

**Note:** You require administrator rights to add product descriptions.

---

To add a product description:

1. Select  (**Sales**) > **Product Master**.
2. Search for the desired product and open the record.
3. Click on  (**New**) on the **Product Descriptions** tab.
4. Select the description's **Language**.  
If you do not select a language, the description applies to all languages for which no description has been entered.
5. Enter a **Description** (for the customer) and, if necessary, an **Internal Description**.

---

**Note:** When adding product records (in the **Account**, **Loan**, **Security** etc. info areas), the product description is transferred to the **Description** field in the product record (in the language selected in the **Language** field).

---

## Product Groups

Different types of products are assigned to different product groups (e.g. accounts, loans).

Product groups are also used to depict assets, real estate, contracts and bundles, which are handled in the same way as products.

The fields displayed on the mask depend on the product group.

**Example:** Account

The screenshot displays the 'Account SuperPlus Saver' interface. At the top, there is a header with the account name and a toolbar with icons for edit, save, and delete. Below the header, the account details are organized into three columns:

Product Master: <u>SuperPlus Saver</u>	Customer pro...: 171612314	Product Group: Account
Sub-product g...: <u>Savings</u>	Product Name: SuperPlus Saver	Data source: Foreign
Balance: 231,00	Opened on: 06.09.2013	Institute: Fleming
Due on:	Last activity on:	Currency: EUR
Active: <input checked="" type="checkbox"/>	Consultant:	
Text:		

Below the details, there are four tabs: 'Details' (selected), 'Revenue', 'Bank Account', and 'Links'. Under the 'Details' tab, the 'Yield' field is visible. At the bottom, there are two tabs: 'Product Roles' and 'Documents'. A dropdown menu icon is located in the bottom right corner of the interface.

## Accounts

You can store information concerning customers' accounts, e.g. revenue.

## Loans

You can store information concerning loans, including the account number, due dates and term.

## Building Savings Accounts

You can store information on building saving accounts, e.g. the beneficiary (as a role), term, type of savings and contractual amount.

## Insurance Policies

You can store information concerning insurance policies, e.g. the term and insurance premium.

There are three types of insurance:

- Personal insurance
- Motor insurance
- Property insurance

## Services

You can store information on services, e.g. standing orders, online banking and transactions.

## Assets and Real Estate

You can store information on customer's assets, e.g. patents, licenses or real estate property.

---

## Securities and Security Accounts

You can store and manage securities and security accounts

- **Securities**

You can store information on securities, e.g. the purchase price, fees etc.

The following fields are transferred from the product master (see [Product Master](#) on page 299):

- **Expenses %**
- **Expenses fixed**
- **Expenses minimum**
- MiFID-specific fields, see [MiFID](#) on page 305.

You can combine several security titles stored for a company or person and group them in a securities account, see [Assigning Securities to a Security Account](#) on page 305. You can also manage securities independently from security accounts.

- **Security Accounts**

You can information on security accounts, e.g. revenue and fees.

All securities assigned to a security account are displayed on the **Security** tab.


---

**Note:** If you add a security to a security account, data entered for the security account on the **MiFID** tab is copied to the security. For further information contact your administrator.

---

### Assigning Securities to a Security Account


To assign a security to an existing security account:

1. Switch to the desired security, see [Product Overview](#) on page 307.
2. Click on  (**Select**) to the right of the **Securities Account** field on the **Links** tab.
3. Search for and select the desired security account.

A link to the securities account is entered in the **Securities Account** field.

### Adding New Securities to a Security Account

To add a new security to a security account:

1. Switch to the desired securities account, see [Product Overview](#) on page 307.
2. Select **New > New Security Title** or click on  (**New**) on the **Security** tab.

The mask used to add securities is displayed, see [Securities](#) on page 304.

- **MiFID**

The **MiFID** tab in the **Security** and **Securities Account** info areas allow you to store risk profiles for securities and securities accounts in accordance with the EU financial markets directive MiFID.

Finance	Criteria	<b>MiFID</b>			
Securities Type		▼	MiFID Risk	1	MiFID Classified
Country of Iss...	Germany	▼	Currency of I...	EUR	▼
			MiFID Comple...	Not Complex	▼

The same tab is also available in the **Product Master** info area, see [Product Master](#) on page 299.

Compare the customer's **MiFID Risk threshold** with the products' **MiFID Risk** to ensure that a customer is only offered products whose **MiFID Risk** does not exceed the customer's **MiFID Risk threshold**.

## Accounts

You can store information concerning customers' accounts, e.g. revenue.

## Loans

You can store information concerning loans, including the account number, due dates and term.

## Building Savings Accounts

You can store information on building saving accounts, e.g. the beneficiary (as a role), term, type of savings and contractual amount.

## Insurance Policies

You can store information concerning insurance policies, e.g. the term and insurance premium.

There are three types of insurance:

- Personal insurance
- Motor insurance
- Property insurance

## Securities and Security Accounts

You can store and manage securities and security accounts

### Securities

You can store information on securities, e.g. the purchase price, fees etc.

---

The following fields are transferred from the product master (see [Product Master](#) on page 299):

- **Expenses %**
- **Expenses fixed**
- **Expenses minimum**
- MiFID-specific fields, see [MiFID](#) on page 305.

You can combine several security titles stored for a company or person and group them in a securities account, see [Assigning Securities to a Security Account](#) on page 305. You can also manage securities independently from security accounts.

## Security Accounts

You can information on security accounts, e.g. revenue and fees.

All securities assigned to a security account are displayed on the **Security** tab.


---

**Note:** If you add a security to a security account, data entered for the security account on the **MiFID** tab is copied to the security. For further information contact your administrator.

---

## Assigning Securities to a Security Account


To assign a security to an existing security account:

1. Switch to the desired security, see [Product Overview](#) on page 307.
2. Click on  (**Select**) to the right of the **Securities Account** field on the **Links** tab.
3. Search for and select the desired security account.

A link to the securities account is entered in the **Securities Account** field.

## Adding New Securities to a Security Account

To add a new security to a security account:

1. Switch to the desired securities account, see [Product Overview](#) on page 307.
2. Select **New > New Security Title** or click on  (**New**) on the **Security** tab.

The mask used to add securities is displayed, see [Securities](#) on page 304.

## MiFID

The **MiFID** tab in the **Security** and **Securities Account** info areas allow you to store risk profiles for securities and securities accounts in accordance with the EU financial markets directive MiFID.

Finance	Criteria	MiFID
Securities Type	▼	MiFID Risk <b>1</b>
Country of Iss...	Germany	▼
Currency of I...	EUR	▼
MiFID Classified	Fully classified	▼
MiFID Comple...	Not Complex	▼

The same tab is also available in the **Product Master** info area, >> [Product Master](#) on page 299.

Compare the customer's **MiFID Risk threshold** with the products' **MiFID Risk** to ensure that a customer is only offered products whose **MiFID Risk** does not exceed the customer's **MiFID Risk threshold**.

## Services

You can store information on services, e.g. standing orders, online banking and transactions.

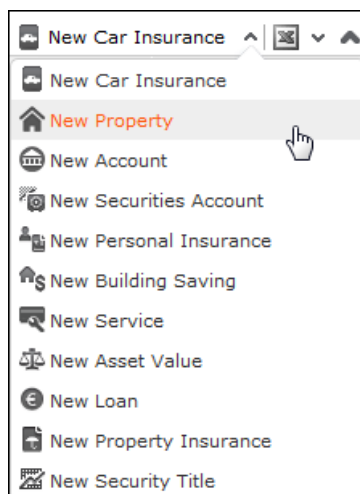
## Assets and Real Estate

You can store information on customer's assets, e.g. patents, licenses or real estate property.

## Storing Customer Products

To add a new product for a customer:

1. Switch to the desired customer.
2. Click on **Product Overview** in the tree.
3. Select the type of product you wish to add from the drop-down list, e.g. **New Car Insurance**.




---

The mask used to add new records is opened. Which fields are displayed depends on the selected product.

A **unique** number (within the product group) is assigned to the **Customer product no.** automatically. You can edit this number.

4. Enter the data.


Click on  (**Select**) next to the the **Product Master** field to select a product and transfer product data from the product master, >> [Product Master](#) on page 299.

5. Save the record.

---

**Note:** You can define roles for the product on the **Product Roles** tab under **Related Data**, >> [Roles](#) on page 308.

---

**Note:** You can also select  (**Sales**) > **Product Overview** to add new products from the search header. In this case you need to select the customer you want to add the product for once you have selected a product.

---

## Product Overview

Use the product overview to display all products, either for a single customer or for all customers.

To display the product overview for a single customer:

1. Switch to the customer whose products you wish to display, see [Product Master](#) on page 299.
2. Click on **Product Overview** in the tree. All the customer's products are listed.
3. Double-click on a product in the list to open the product record, or select **Go to product** from the record's context menu.

You can add new products to customers from the product overview, see [Storing Customer Products](#) on page 306.

---

**Note:** All products apart from contracts/bundles are displayed in the product overview. For more information on products/bundles, see [Contracts and Bundles](#) on page 309.

---

## Roles

You can assign various roles to products and contracts.

For example, an insurance policy may involve persons in various roles such as the policy holder, the person paying contributions, the beneficiary etc.

The roles defined for a product are displayed on the **Product Roles** tab.

The roles defined for a product are displayed on the **Roles to Contract/Bundle** tab.

### Adding Roles

To add a customer to a product in a specific role:

1. Switch to the desired product, see [Product Overview](#) on page 307.
2. Select **New > New Role** or click on **⊕ (New)** on the **Product Roles** tab.
3. Select the customer (company, person, association) who should be assigned the role.
4. Select the appropriate role.
5. Click on **Continue** .

The product record is opened. The newly added role is displayed on the **Product Roles** tab.

---

**Note:** Roles are added to contracts/bundles on the **Role to Contract/Bundle** tab.

---

### Adding Roles

To add a customer to a product in a specific role:

1. Switch to the desired product, see [Product Overview](#) on page 307.
2. Select **New > New Role** or click on **⊕ (New)** on the **Product Roles** tab.
3. Select the customer (company, person, association) who should be assigned the role.
4. Select the appropriate role.
5. Click on **Continue** .

The product record is opened. The newly added role is displayed on the **Product Roles** tab.

---

**Note:** Roles are added to contracts/bundles on the **Role to Contract/Bundle** tab.

---



## Contracts and Bundles

Various products stored for customers can be grouped to form contracts and bundles.

You can use a contract to group a building society savings account, a loan and an insurance policy, for example.

Contracts can be grouped together in bundles.

To display the contracts/bundles for a single customer:

1. Switch to the desired customer, see [Product Master](#) on page 299.
2. Click on **Contracts/Bundles** in the tree. All the customer's contracts/bundles are listed.
3. Double-click on a contract/bundle in the list to open the record, or select **Open** from the record's context menu.

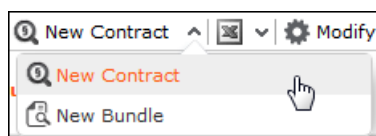


Select **(Sales) > Contracts/Bundles** to display the contracts and bundles added for all customers.

### Adding Contracts and Bundles

To add a new contract or bundle:

1. Switch to the desired customer.
2. Click on **Contracts/Bundles** in the tree.
3. Select **New Contract** or **New Bundle** from the drop-down list.



The mask used to add new records is opened.

A **unique** number is assigned to the **Contract number** automatically. You can edit this number.

4. Enter the remaining data.
5. Save the record.


---

**Note:** You can define roles for the product on the **Roles to Contract/Bundle** tab under **Related Data**, see [Roles](#) on page 308.

---

## Assigning Products to a Contract

To assign a product to a contract:

1. Switch to the desired product, see [Product Overview](#) on page 307.
2. Click on  (**Select**) to the right of the **Contract** field on the **Links** tab.
3. Search for and select the desired contract.

The contract number and other data are transferred to the product.

4. Save the record.


---

**Note:** If you open a contract, the **... is linked to Products** tab displays the products assigned to the contract.

---

## Assigning a Contract to a Bundle

To assign a contract to a bundle:

1. Switch to the contract you want to assign to a bundle, see [Contracts and Bundles](#) on page 309.
2. Click on  (**Select**) to the right of the **Bundle** field on the **Links** tab.
3. Select the desired bundle.

The contract number and other data are transferred to the bundle.

4. Save the record.

---

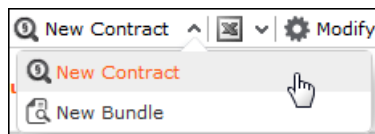
**Note:** The contracts in the bundle are listed on the **Contracts** tab.

---

## Adding Contracts and Bundles

To add a new contract or bundle:

1. Switch to the desired customer.
2. Click on **Contracts/Bundles** in the tree.
3. Select **New Contract** or **New Bundle** from the drop-down list.



The mask used to add new records is opened.

A **unique** number is assigned to the **Contract number** automatically. You can edit this number.

4. Enter the remaining data.
5. Save the record.


---

**Note:** You can define roles for the product on the **Roles to Contract/Bundle** tab under **Related Data**, >> [Roles](#) on page 308.

---

## Assigning Products to a Contract

To assign a product to a contract:

1. Switch to the desired product, >> [Product Overview](#) on page 307.
2. Click on  (**Select**) to the right of the **Contract** field on the **Links** tab.
3. Search for and select the desired contract.

The contract number and other data are transferred to the product.

4. Save the record.


---

**Note:** If you open a contract, the **... is linked to Products** tab displays the products assigned to the contract.

---

## Assigning a Contract to a Bundle

To assign a contract to a bundle:

1. Switch to the contract you want to assign to a bundle, see [Contracts and Bundles](#) on page 309.
2. Click on  (**Select**) to the right of the **Bundle** field on the **Links** tab.
3. Select the desired bundle.

The contract number and other data are transferred to the bundle.

4. Save the record.

---

**Note:** The contracts in the bundle are listed on the **Contracts** tab.

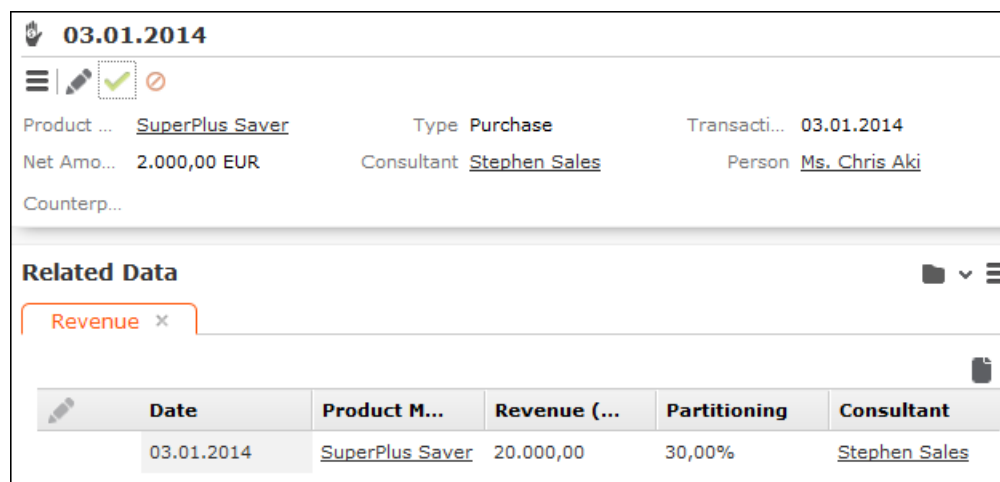
---

# 7

## Transactions and Revenue – FSI

Learn to add transactions and revenues.

You can add transactions for customers. A transaction represents the purchase or sale of a product (e.g. buying shares, investing in real estate). You can store revenue for each transaction (e.g. commission) which can be split amongst multiple reps.



**03.01.2014**

Product ... SuperPlus Saver      Type Purchase      Transacti... 03.01.2014  
 Net Amo... 2.000,00 EUR      Consultant Stephen Sales      Person Ms. Chris Aki  
 Counterp...

**Related Data**

Revenue x


Date	Product M...	Revenue (...)	Partitioning	Consultant
03.01.2014	<u>SuperPlus Saver</u>	20.000,00	30,00%	<u>Stephen Sales</u>

**Note:** Transactions and revenue are normally **imported**, but can also be added manually.

To display transactions and revenue:

1. Switch to the desired customer, see [Product Master](#) on page 299.
2. Click on **Transactions/Revenues** in the tree. All the customer's transactions are listed.
3. Click on a transaction in the list. Revenues stored for the transaction are listed below.



Select  (**Sales > Transactions** or **Revenues** to display all transactions/revenues for all customers.

### Adding Transactions

Transactions are always added for a customer.

---

To add a transaction:

1. Switch to the desired customer, see [Master Data – FSI](#) on page 208.
2. Click on **Transactions/Revenues** in the tree.
3. Click on **+** (**New**). The mask used to add new transactions is opened.

You are automatically entered in the **Consultant** field. You can change the consultant.

4. Click on **Q** (**Select**) next to the the **Product Master** field to select a product.  
You can enter a counterparty in the **Counterparty** and/or **Person** fields.

5. Enter the data.
6. Save the record.



**Note:** You can also select **(Sales) > Transactions** and add new transactions from the search. Click on **+** (**New**) and select the desired customer.

---

## Adding Revenue

Revenue is always added for a transaction.

To add revenue for a transaction:

1. Switch to the desired customer, see [Master Data – FSI](#) on page 208.
2. Click on **Transactions/Revenues** in the tree.
3. Select the desired transaction.
4. Click on **+** (**New**) on the **Revenue** tab. The mask used to add new records is opened.

You are automatically entered in the **Consultant** field. You can change the consultant.

Some fields are automatically filled with data from the transaction (e.g. **Transaction**, **Trade Type** (transaction type), **Currency**, **Date**, **Net Amount**).


Enter the **Type** of revenue and the **Revenue (in EUR)**.

Enter the rep's share of the overall revenue in the **Partitioning** field (the default is 100%). The sum total entered for all reps sharing the same revenue should be 100%.

5. Enter the remaining data.
6. Save the record.

The appropriate share of the revenue is automatically entered in the **Revenue (Consultant)** field.



**Note:** You can also select  (**Sales**) > **Transactions** and add new transactions from the search. Click on ⊕ (**New**). Select the transaction that the revenue should be added for.

---

## Adding Transactions

Transactions are always added for a customer.

To add a transaction:

1. Switch to the desired customer, see [Master Data – FSI](#) on page 208.
2. Click on **Transactions/Revenues** in the tree.
3. Click on ⊕ (**New**). The mask used to add new transactions is opened.


You are automatically entered in the **Consultant** field. You can change the consultant.

4. Click on 🔍 (**Select**) next to the the **Product Master** field to select a product.

You can enter a counterparty in the **Counterparty** and/or **Person** fields.

5. Enter the data.
6. Save the record.



**Note:** You can also select  (**Sales**) > **Transactions** and add new transactions from the search. Click on ⊕ (**New**) and select the desired customer.

---

## Adding Revenue

Revenue is always added for a transaction.

To add revenue for a transaction:

1. Switch to the desired customer, see [Master Data – FSI](#) on page 208.
2. Click on **Transactions/Revenues** in the tree.
3. Select the desired transaction.
4. Click on ⊕ (**New**) on the **Revenue** tab. The mask used to add new records is opened.

---

You are automatically entered in the **Consultant** field. You can change the consultant.

Some fields are automatically filled with data from the transaction (e.g. **Transaction**, **Trade Type** (transaction type), **Currency**, **Date**, **Net Amount**).

Enter the **Type** of revenue and the **Revenue (in EUR)**.



Enter the rep's share of the overall revenue in the **Partitioning** field (the default is 100%). The sum total entered for all reps sharing the same revenue should be 100%.

5. Enter the remaining data.

6. Save the record.

The appropriate share of the revenue is automatically entered in the **Revenue (Consultant)** field.

---

**Note:** You can also select  (**Sales**) > **Transactions** and add new transactions from the search. Click on  (**New**). Select the transaction that the revenue should be added for.

---

# 8

## Projects – FSI

Aurea CRM's project management functions allow you to depict and manage complex projects such as construction projects.

You can:

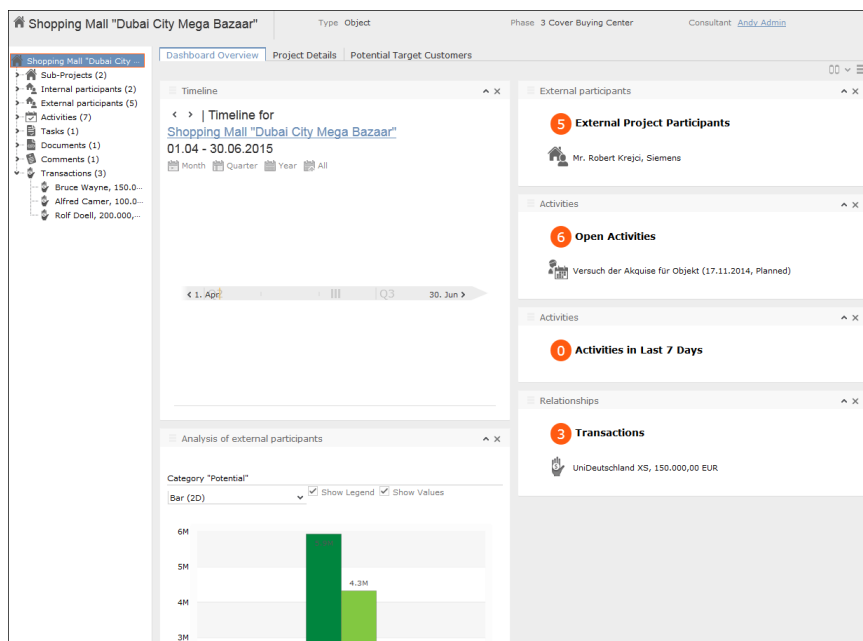
- Manage projects and their internal and external participants, tasks and sub-projects
- Manage properties (e.g. construction projects) and closed-end fund and subscribers, document transactions and monitor sales activities

To open a project:



1. Select **(Sales) > Projects**.
2. Search for and open the desired record.

The most important information on activities, participants etc. is displayed in the dashboard.



3. The **Project Details** tab displays information on the project including its type and status.



Dashboard Overview | **Project Details** | Potential Target Customers

### Shopping Mall "Dubai City Mega Bazaar"

Adjust Layout & Fields

Name Shopping Mall "Dubai City Mega Bazaar"

Type Object Subtype Filmfonds (BASE) Phase 3 Cover Buying Center

Status 1 In Progress Consultant [Andy Admin](#) Amount 250.000.000EUR

Description Located in Dubai's **third largest business district**, approximately 14 kilometres north-west the city, the mall is surrounded by the affluent residential areas of Dubai's northern suburbs and the University. The redevelopment of this mall **will completely change the centre from a mid-market enclosed shopping centre to the second largest shopping centre in Dubai by 2015**. It will showcase established local and international brands, aspirational fashion retailers, unique leisure and lifestyle retailers and the best fresh food offering in the area.

Starts on 03.11.2014 Ends on 30.11.2014

4. The **Potential Target Customers** tab allows you to search for similar projects and their external participants in order to identify customers who previously invested in such projects.

Dashboard Overview | Project Details | **Potential Target Customers**

#### Similar Objects

Search Results

Name	Type	Phase	Start...	Creat...
Shopping Mall north Face	Object	1 Identification		10.1...

#### Potential target customers

Company/Association	Person	Participation	Role
<a href="#">UPDATE SOFTWARE AG...</a>	<a href="#">Mr. Andy Admin</a>		
	<a href="#">Alfred Camer</a>		

5. Use the tree view to navigate through the project data or to add new data. You can:
- Add sub-projects (which can in turn be broken up into sub-projects)
  - Add internal participants in various roles
  - Add external participants (persons, contact persons, business clients/associations)
  - Add activities, see [Activities](#) on page 245.
  - Add tasks, see [Tasks](#) on page 252.
  - Manage documents, see [Document Management](#) on page 265.
  - Store comments
  - Track transactions and revenue, see [Transactions and Revenue – FSI](#) on page 312.

# 9

## Consultation Documentation – FSI

Aurea CRM web allows you to document customer consultations.

The consultation process guides you through this process.

The consultation process consists of four phases (entering basic data; documenting the products that were discussed; entering a reasoning for discussing the products and other information; summary). During each phase, you enter data concerning the consultation and the products that have been discussed.

You can exit the consultation process at any time and continue at a later date.

The traffic light icon in the phase arrows indicates your progress in each phase. Move your mouse cursor over the arrows or icons to display a tooltip containing more information.

The consultation process is started from an activity.

You can switch to completed phases to edit the data entered there (e.g. return from phase 2 to phase 1). Click on the phase arrow to switch to the desired phase.

To start the consultation process:

1. Switch to the desired activity or add a new one, see [Activities](#) on page 245.
2. Click on (**New/Edit Consultation**) or select **New/Edit Consultation** from the context menu.

The consultation process is opened.

---

**Note:** Only one consultation can be stored per activity. If a consultation already exists for an activity, the consultation process is opened in the most recent phase.

---

### Phase 1 - Basic Data

Enter basic data concerning the consultation in phase 1.

If you add the consultation to an activity added for a company, you need to enter the person the consultation was with.

Once you have saved this data, click on phase 2 in the header to switch to phase 2, see [Phase 2 - Consultation Topics](#) on page 321.

## Phase 2 - Consultation Topics

Enter information on the products discussed during the consultation in this phase.

Product Group	Sub-product group	Consultant	Cons...	Status	Sum	Curre...
Account	Savings	Andy Admin	07.02.2014	Offered		EUR

To add a product that you have discussed with the customer:

1. Click on **+** (**New**). The mask used to add new records is opened.
2. Click on **🔍** (**Select**) next to the **Product Master** field to select a product.  
Data such as the **Product name** and **Product Group** is transferred from the product master.
3. Enter the remaining data.
4. Save the record.

Once you have added a product, you can click on phase 3 in the header to switch to phase 3, >> [Phase 3 - Argumentation](#) on page 322.

## Phase 3 - Argumentation

Enter the reason for suggesting the products that were discussed and any other information concerning the consultation.

**Argumentation 07.02.2014 (Andy Admin)**

Delivery of do... Courier

Other docume... Share investment teaser

Comments Also interested in financing options for a new apartment

Discussed non...

\*Customer rel... New savings account after moving to new city

---

Consultation Topic x Document x

Product Group Sub-product group Consultant Cons... Status Sum Curre...

Account	Savings	Andy Admin	07.02.2014	Offered		EUR
---------	---------	------------	------------	---------	--	-----

Once you have saved this information, the process automatically proceeds to phase 4, see [Phase 4 - Summary](#) on page 322.

### Phase 4 - Summary

A summary of the consultation is displayed in phase 4. You can edit the consultation as necessary and click on the phase arrows to return to a previous phase.

Click on (**Create Report**) and select a letter template to generate a report summarizing the consultation. A Word document is generated and opened. You can edit the document in Word. Once the document has been saved, a PDF is generated automatically and linked to the activity the consultation was added for. Click on the **Summary** phase arrow to refresh the display; the PDF file is then displayed on the **Documents** tab.

**Basic Data 18.06.2014 (SU9100)**

Create Report Finalize Consultation

Consultant SU9100 Consultation ... 18.06.2014 Consultation i...

Motive for con... Delivery of do... Courier Completion D...

Other docume...

Discussed non...

Customer rela... Long-term investment with minimum risk and medium profit forecast.

---

Consultation Topic x Documents x History x

Product Group Sub-product group Consultant Consult... Status Shares... Currency

Security	Bonds Fund	SU9100	18.06.2014	Offered		
----------	------------	--------	------------	---------	--	--

Click on (**Finalize Consultation**) to close the consultation. The current date is entered in the **Completion Date** field and the process is closed and you are returned to the activity.

You can view the consultation on the **Consultation** tab under **Related Data** in the activity.

If you open a consultation that has been completed, the consultation process is opened, but you cannot edit the data. You can however switch between the phases using the phase arrows.

## Phase 1 - Basic Data

Enter basic data concerning the consultation in phase 1.

**New: Consultation**

Activity Type **Visit** Consultant **Andy Admin** Consultation ... **07.02.2014**

Initiative \_\_\_\_\_ Name of actin... \_\_\_\_\_ Motive for con... \_\_\_\_\_

Marketing Acti... \_\_\_\_\_

If you add the consultation to an activity added for a company, you need to enter the person the consultation was with.

Once you have saved this data, click on phase 2 in the header to switch to phase 2, >> [Phase 2 - Consultation Topics](#) on page 321.

## Phase 2 - Consultation Topics

Enter information on the products discussed during the consultation in this phase.

**Consultation Topic linked to Basic Data 07.02.2014 (Andy Admin)**

**Search Results**

Product Group	Sub-product group	Consultant	Cons...	Status	Sum	Curre...
Account	Savings	Andy Admin	07.02.2014	Offered		EUR

To add a product that you have discussed with the customer:

1. Click on **+** (**New**).

The mask used to add new records is opened.

2. Click on **Q** (**Select**) next to the **Product Master** field to select a product.

Data such as the **Product name** and **Product Group** is transferred from the product master.

3. Enter the remaining data.
4. Save the record.

Once you have added a product, you can click on phase 3 in the header to switch to phase 3, >> [Phase 3 - Argumentation](#) on page 322.

## Phase 3 - Argumentation

Enter the reason for suggesting the products that were discussed and any other information concerning the consultation.

**Argumentation 07.02.2014 (Andy Admin)**

Delivery of do... Courier

Other docume... Share investment teaser

Comments Also interested in financing options for a new apartment

Discussed non...

\*Customer rel... New savings account after moving to new city

---

Consultation Topic x Document x


Browse

Product Group	Sub-product group	Consultant	Cons...	Status	Sum	Curre...
Account	Savings	<a href="#">Andy Admin</a>	07.02.2014	Offered		EUR







Once you have saved this information, the process automatically proceeds to phase 4, >> [Phase 4 - Summary](#) on page 322.

## Phase 4 - Summary

A summary of the consultation is displayed in phase 4. You can edit the consultation as necessary and click on the phase arrows to return to a previous phase.

Click on  (**Create Report**) and select a letter template to generate a report summarizing the consultation. A Word document is generated and opened. You can edit the document in Word. Once the document has been saved, a PDF is generated automatically and linked to the activity the consultation was added for. Click on the **Summary** phase arrow to refresh the display; the PDF file is then displayed on the **Documents** tab.


**Basic Data 18.06.2014 (SU9100)**






 Create Report
  Finalize Consultation

Consultant: SU9100      Consultation ... 18.06.2014      Consultation i...  
 Motive for con...      Delivery of do... Courier      Completion D...  
 Other docume...  
 Discussed non...  
 Customer rela... Long-term investment with minimum risk and medium profit forecast.

---

Consultation Topic x | Documents x | History x

	Product Group	Sub-product group	Consultant	Consult...	Status	Shares...	Currency
	Security	Bonds Fund	<u>SU9100</u>	18.06.2014	Offered		

Click on  (**Finalize Consultation**) to close the consultation. The current date is entered in the **Completion Date** field and the process is closed and you are returned to the activity.

You can view the consultation on the **Consultation** tab under **Related Data** in the activity.

If you open a consultation that has been completed, the consultation process is opened, but you cannot edit the data. You can however switch between the phases using the phase arrows.

# 10

## German Stock Trading Act Process – FSI

Learn about the German Stock Trading Act Process.

According to the German Stock Trading Act (WpHG), financial services providers are obliged by law to document the subject of investment consultations with private investors and to hand over the document to the customer.

Aurea CRM includes a process that guides you through the necessary steps and allows you to generate documentation.

To start the process:

1. Switch to the desired customer.
2. Click on **WpHG** in the tree and then click on **+** (**New**).

Depending on whether the process is started from a private person or a company, different phases are included in the process and you need to enter different information.

### Process for Persons

The screenshot shows the 'New: WpHG' form in the Aurea CRM system. The form is divided into several tabs: 'General Information', 'Financial Information', 'Experience (k)', 'Experience (FCY)', 'Risk information', and 'Finalize & Overview'. The 'General Information' tab is active. The form contains the following fields:

- MIFID Current Classi... (dropdown)
- MIFID training (dropdown)
- \*Investment strategy (dropdown)
- Annotation investme... (text area)
- \*Type of service (dropdown)
- \*Main objective (dropdown)
- MIFID profession (dropdown)
- \*Planing horizon (dropdown)

At the bottom, the consultant is identified as 'SU9100' and the status is 'WPHG sheet complet...'.

### Process for Companies

The screenshot shows the 'New: WpHG' form in the Aurea CRM system for a company. The form is divided into several tabs: 'General Information', 'Financial Information', 'Risk information', and 'Finalize & Overview'. The 'General Information' tab is active. The form contains the following fields:

- \*Contact pers... Mr. Thomas Holzkopf (text)
- MIFID Current... (dropdown)
- \*Main objective (dropdown)
- \*Planing horiz... (dropdown)
- \*Investment s... Balanced (max. 50% shares) (dropdown)
- Annotation inv... (text area)

At the bottom, the consultant is identified as 'SU9100' and the status is 'WPHG sheet c...'.



---

You need to enter data in all mandatory fields in each phase. Once you save the data, the process switches to the next phase. Click on the phase arrow to switch to a previous phase.

To open an existing record in the WpHG process, switch to the **WpHG** node in the tree. If the process has not been completed, the record is displayed with a red bar. Select a record in the list and click on **Start Stock Trading Act Management** to start the process or double-click on a record to open it in the tree. Click on **Start Stock Trading Act Management**.

If you leave the WpHG process without completing it, it is reopened in the "General Information" phase. The data entered previously is retained and you can switch to the next phase using the **Save** button. Once the process has been completed, it is reopened in the "Finalize & Overview" phase and you cannot edit the data.

---

**Note:** If you add a new WpHG record for a customer for which a WpHG record already exists, the last WpHG record added is used as a template and data from that record is transferred to the new record. You can edit this data.

---

The WpHG process consists of the following phases:

- **General information:**

Enter general information in this phase, such as the desired services and investment strategy.

If you start the process from a company, you need to select a contact person at the company.

- **Financial Information:**

Enter financial information such as the customer's bank balance, securities and income.

- **Experience (EUR) (persons only):**

Enter information on the person's experience with investments such as shares and bonds in euro.

- **Experience (FCY) (persons only):**


Enter information on the person's experience with investments such as shares and bonds in foreign currencies.


- **Risk Information:**

Enter information on the investment options that were discussed, the risks and the documents that were distributed to the customer.

- **Finalize & Overview:**

This phase provides you with an overview of the data you have entered and allows you to complete the process.

Click on  (**Create Documentation**) and select a letter template to generate documentation concerning the consultation. The documentation is opened in Word and you can edit and save it. A PDF is created when you close the Word document and linked to the WpHG record. Click on the **Finalize & Overview** phase arrow to refresh the display. The PDF file is displayed on the **Documents** tab and is linked to the customer (**Documents** node in the tree).

Click on  (**Finalize Stock Trading Act Form**) to complete the process. The **WPHG sheet completed** field is enabled automatically and the **WpHG due date** is set to the current date + 2 years. You can no longer edit the record.

# 11

## Campaigns and Marketing Activities

---

Aurea CRM supports you in planning, executing and monitoring marketing campaigns. A campaign consists of one or more marketing activities. Campaigns target customers and interests based on information accumulated by sales, service and marketing employees.

You can:

- Define customer-specific marketing activities (e.g. telephone surveys or mailings).
- Determine the responsible rep (e.g. telemarketing agent, account manager).
- Define the available responses from the target group
- Edit the generated target group
- Generate and edit activities, incidents and mailings
- Generate mass mailings and faxes
- Send SMS and e-mails
- Trigger follow-up marketing activities automatically based on responses
- Monitor the results

### Quick Campaigns

Quick campaigns allow you to generate a letter for several recipients, without needing to first add a campaign and associated marketing activities etc.

Quick campaigns are accessible from the result lists for companies, persons and in queries.


- Rows in query results may include data from multiple records, and may therefore contain multiple recipients that can be used by the quick campaign, >> [Adding Info Areas to Conditions](#) on page 104.

If a row contains multiple possible recipients e.g. multiple records in the FI, FP, CP and PE info areas, the last record in the query row (in the last info area defined in the query) is used to determine the recipient.

If a row does not contain any recipients, but contains data from one or more records, the standard link to the parent record in the last info area defined in the query is used to determine the recipient (e.g. the company a ticket is linked to). If several default links are available, e.g. for a company and a person, the recipient is determined in the order KP/CP/PE/PI.

- If the results include several pages, only those (selected) persons on the current page are included.

To start a quick campaign:

1. Select the records you wish to send a letter to in the search or query results list, >> [Selecting Multiple Records](#) on page 83. If you do not select any rows in the results list, the quick campaign is executed for all rows.
2. Click on  (**Quick Campaign**) or select **Quick Campaign** from the context menu.
3. Select a letter template and click on **Load**.

Microsoft Word is started and you can edit the letter.


The following data is added in the background:

- A campaign of the type **Quick Campaign**
  - A marketing activity
  - An activity for each recipient
  - The letter document is added to the marketing activity as a document link
4. When you close the document, you will be informed of which marketing activity the letter was linked to. You can click on the link in the message to open the marketing activity.

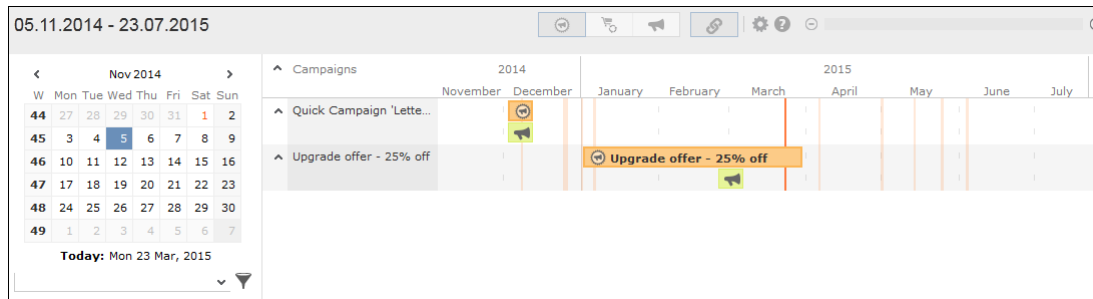
## Marketing Calendar

The marketing calendar is an important tool for managing campaigns. The marketing calendar displays a graphical overview of activities and campaigns including an indicator that represents a campaign or marketing activity's progress or success.

To display campaigns and marketing activities in the marketing calendar:

1. Select  (**Marketing**) > **Marketing Calendar**.

The marketing calendar is displayed.






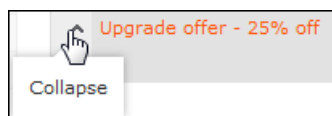
Individual elements (campaigns, sales cycles, marketing activities) are displayed as colored blocks.



**Note:** If no end date is entered in a marketing activity, it is displayed as lasting for a single day.

The current date is indicated by a vertical line.

You can edit and display campaigns and activities in a number of ways:

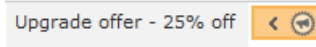
- Use the icons in the header to choose what to display:
  - : Campaigns and marketing activities
  - : Sales cycles and marketing activities
  - : Only marketing activities
- To display or hide the marketing activities that make are part of a campaign, click on ^ or v in the left-most column. Click on ^ or v in the column header to hide/show all marketing activities for all campaigns.



-  (**Edit Settings**): Choose whether to color-code elements by type (info area) or status.
-  (**Legend**): Displays information on the colors in the calendar
- To configure the time period that is displayed:
  - Click on the desired day or start of the time period in the small calendar in the sidebar.
  - Select the time period that is displayed using the slider in the header: drag the slider to the left or right or click on the plus and minus signs on either side to zoom in or out.




- Drag the timeline at the top of the calendar to the left or right to scroll the time period.
- Select a filter from the drop-down list in the sidebar to determine which elements should be displayed. You can also define your own filter, >> [Defining General Filters](#) on page 243.
- If the full duration of an element in the calendar is not visible, an arrow is displayed indicating that the element's duration exceeds the display area:



- To change an entry's start or end, click on the left or right border and drag it to the desired position:



- To reschedule an element, click on it and drag it to the desired time.

Click on  (**Move linked items**) to determine whether activity execution records and agenda items should also be rescheduled accordingly. For more information on the affected fields in the activity execution and agenda item records, refer to the online field help.


- Click on a campaign or marketing activity to display a summary of the record.
- Double-click on a campaign or marketing activity in the marketing calendar to edit it.

## Campaigns

A campaign consists of one or more marketing activities that take place sequentially. You can also add marketing activities that are not part of a campaign, >> [Defining Marketing Activities](#) on page 333.

## Adding Campaigns

To add a new campaign:

1. Select  (Marketing) > Campaigns, click on **Start Search** and click on **(New)**.
2. The following options are available:
  - **Empty Campaign:** Creates a new campaign.
  - **Use Template:** Copies the data from an existing campaign template, >> [Campaign and Marketing Activity Templates](#) on page 345. You then need to customize the data in the new campaign:
    - Search for and select the desired campaign template.
    - The date entered in the campaign is not copied. Enter the desired date for the new campaign and click on **OK**. The campaign, including all associated marketing activities, is copied and rescheduled for the new date.
3. Enter the relevant data in the fields, including the name of the campaign, the type, the rep responsible for the campaign as a whole and the start and end date.

**New: Campaign**

✓

Name  Type

Starts on  Language  Status

Ends on  Responsible  Event location

Text

**Approval & Verification** | Target Group Size & Costs | Success (Overview) | Success (Details)

Budget appr...  Budget appr...

Verification r...  Verification by  Verified on

4. Save the record.
5. Add the marketing activities that make up the campaign, >> [Defining Marketing Activities](#) on page 333.

**Note:** If you delete a campaign, all marketing activities, agenda items and equipment linked to the campaign are also deleted.

## Marketing Activities

Marketing activities are executed in the following steps:

1. Preparation, >> [Planning and Preparing Marketing Activities](#) on page 332.
2. Define the marketing activity and any additional information, >> [Defining Marketing Activities](#) on page 333.
3. Create the target group, >> [Creating Target Groups](#) on page 340.
4. Edit the target group, >> [Editing Target Groups](#) on page 340.
5. Generate and edit the data, >> [Executing Marketing Activities](#) on page 341.
6. Monitor the results, >> [Monitoring Results](#) on page 342.

Related marketing activities can be grouped together to form campaigns, >> [Campaigns](#) on page 330.

## Planning and Preparing Marketing Activities

Before executing a marketing activity, you need to enter its details and create any necessary documents and records:

1. Determine how you wish to contact your customers or prospects:
  - Mailings: Letters, e-mails, faxes or SMS can be created automatically within the scope of the marketing activity.
  - Telephone: Activity records are automatically generated and can be edited by telemarketing staff.
  - Combined channels: The customer/prospect is contacted using their preferred channel.
2. Create the target group using a query, >> [Queries](#) on page 98.

You do not need to define a target group for follow-up activities and published adverts: These target groups are built up manually later. The target group created for a follow-up activity contains those customers/prospects that responded to the previous activity in a specific manner.
3. Determine which labels should be used for letters. A label determines how the address and greeting in a letter are formatted. You can enter a general label when defining the marketing activity or enter a specific label for each person. For more information on labels, contact your administrator.
4. Determine which database fields you want to merge with the text of the letter or e-mail.



---

**Note:** The document templates in Aurea CRM web already include a number of database fields, >> [Adding and Editing Templates](#) on page 346. If you require additional fields, contact your administrator. Your administrator can define additional transfer fields that you can select in the marketing activity format.

---

5. When planning e-mail campaigns, verify that e-mail addresses have been entered for the recipients in the target group.

---

**Note:** Aurea CRM web only supports sending e-mails via SMTP within the scope of marketing activities.

---

6. In order to send SMS, your administrator needs to define SMS settings. For more information on the format of a message sent via SMS, contact your administrator.


---

**Note:** To send email in a language other than the default languages, you should use UTF-16 encoding for the template documents. For example, to send a mail in Cyrillic, encode the HTML template document in UTF-16.

---

## Defining Marketing Activities

To define a marketing activity:

1. Select  (Marketing) > **Marketing Activities**, click on **Start Search** and click on ⊕ (New).

You can also add a marketing activity to a campaign (in the tree view or on the **Marketing Activities** tab).

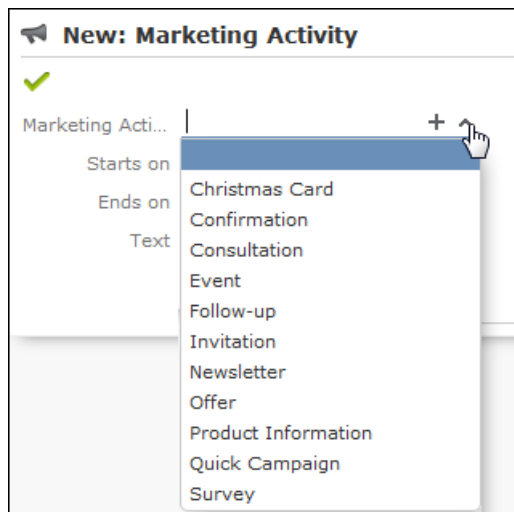
2. The following options are available:
  - **Empty Marketing Activity:** Creates a new marketing activity.
  - **Use Template:** Copies the data from an existing marketing activity >> [Adding and Editing Templates](#) on page 346. You then need to edit the data in the new marketing activity.

---

**Note:** You can only use marketing activities whose **Status** is "Template" as a template.

---

3. Enter a name in the **Marketing Activity** field.



4. Save the record.
5. Enter the following data:
  - Responses, >> [Responses](#) on page 334.
  - Reps, >> [Reps](#) on page 335.
  - Details on how the activity is executed, >> [Defining How the Marketing Activity is Executed](#) on page 336.

## Responses

You can enter the possible response to a marketing activity, which allows you to:

- Define follow-up activities, for example, to send an offer to those respondents who react positively to the first telephone contact.
- Review responses and count the number of responses of each type in order to determine the success of the marketing activity.


To define the follow-up response and assign points to a response:

1. Define two marketing activities. The second marketing activity should be dependent on a specific response being given to the first one.
2. Switch to the **Responses** tab in the new marketing activity and click on ⊕ (**New**).
3. Enter the **Response** (e.g. "Yes, send me an offer").
4. Select the second marketing activity in the **Follow-up Marketing Activity** field.

If this response is received, the respondent is automatically assign to the follow-up marketing activity's target group.

**New: Response (Marketing Activity)**

Marketing Act... Survey      Response I'm interested + ▾

Follow-up Mar... Invitation 

Number (Plan) 150      Individual poi... 10      Max. number ... 200

Number (Act.)      Points (Act.)

Registration ▾

Participation s... ▾

Result ▾

5. Enter the number of points assigned to this response in the **Individual points** field and enter the expected number of responses in the **Number (Plan)** field. The target and actual points can then be compared in the statistics, >> [Monitoring Results](#) on page 342.
6. Save the record.

## Reps

Add the reps who are responsible for handling the campaign in addition to the rep responsible for the campaign itself:

1. Click on ⊕ (**New**) on the **Reps** tab in the marketing activity.
2. Enter the desired rep in the **Rep** field.
3. Determine the rep's task(s):
  - **Telephone:** Indicates whether the rep is responsible for making or answering phone calls within the scope of this marketing activity.
  - **E-mail:** Indicates whether the rep is responsible for processing incoming e-mails within the scope of the marketing activity.
  - **Target Group:** Indicates whether the rep is responsible for verifying and editing a portion of the target group. The rep receives a To-Do once the target group has been generated, >> [Editing Target Groups](#) on page 340.

---

**Note:** The **Telephone** and **E-mail** fields have no function in the default configuration.

---

4. Save the record.

## Defining How the Marketing Activity is Executed

The **Execution (Marketing Activity)** info area is used to store all the important information needed to execute the marketing activity:

- Target group
- Schedule
- Data entered in activities, mailings and incidents
- File formats and other information on mailings, e-mails, SMS and faxes.

To enter the details of how a marketing activity is executed:

1. Select **Create / Edit Execution** from the marketing activity's context menu.
2. Use the **Base** field to determine the basis for the target group. The target group can be determined using a global query or private query, >> [Queries](#) on page 98.
3. Select a predefined query in the **Target group definition** field.

---

**Note:** Leave this field empty for follow-up activities. The target groups for follow-up activities are generated automatically based on responses to previous marketing activities.

---

4. Select a **Marketing Activity Format** or select **Create Marketing Activity Format** from the context menu to add a new one.
5. Select an option in the **Execution Type** field.

The following options execute the marketing activity a single time:

- **One-off: Create target group based on query:** When generating the records, the selection or query is updated and the used to determine the target group.
- **One-off: Create target group based on response / new entry:** The target group is generated automatically based on responses to the previous marketing activity or by editing the target group manually.

The following options execute the marketing activity a repeatedly (in the interval defined in the **Frequency** and **Unit** fields on the **Repeated** tab):

- **Repeated: Create target group based on responses every time new:** The existing target group is deleted each time the activity is executed. The query is updated, and the results are used to create the new target group.

---

**Note:** If a target group record is marked as inactive (the **Inactive** field is enabled), the record remains inactive if the record is still in the selection when the query is executed again.

---

- **Repeated: Create target group based on response / new entry:** The target group is generated automatically based on responses to the previous marketing activity or by editing the target group manually.
  - **Repeated: Send in packets:** The target group is generated from the query the first time the activity is executed. Each time the marketing activity is executed, records are generated for members of the target group that have not yet been contacted. The **Max. package size** on the **Repeated** tab determines the maximum number of records in the target group that are processed each iteration. The marketing activity continues to be executed until all recipients in the target group have been contacted. Typically used for mailings that for reasons of cost or logistics cannot be handled in one go.
  - **Repeated: Extend target group based on query results:** The query is executed each time the activity is executed. The existing target group records are retained. Only those recipients returned by the query and not included in the target group are added to the target group. The marketing activity is executed for these recently added records. Typically used for mailings to new customers, e.g. to contact all companies that have had their status set to "Customer" since the last time the activity was executed.
6. Use the **Milestones** tab to define the dates for executing the activity:
- **Start on, Start at:** Determine when the marketing activity is executed and the target group generated.
  - **Create target group:** Enable this check box to use the query to generate the target group.
  - **Editing target group from/until:** Defines the time period in which the target group can be edited
  - **Execute activity on/at:** Determines when the records relating to the marketing activity are generated
  - **Response possible until:** The date until which the responses received are taken into account
7. Enter the rep assigned to CRM.server in the **Executing User** field. (Ask your administrator for this information.) This ensures that CRM.server processes the execution automatically.

8. Define additional options in the following tabs:

- **Letter, E-Mail, Fax, SMS:** Information on the contents of the information that is sent, e.g. the e-mail's text.
- **Activities:** Details on the generated activities
- **Mailings:** Details on the generated mailings
- **Work Order:** Details on the generated incidents

---

**Note:** You cannot generate mail merges in Microsoft Word in a server environment. Once the marketing activity has been executed, you can download the control file and perform the mail merge locally. The control file can be found on the **Letter, E-Mail, Fax** and **SMS** tabs. If you enable the **Save letters** option on the **Letter** tab, the customer data in the control file can be linked to the sent text after the letters have been sent. This allows you to reconstruct the letter that was sent.

---

- **Repeated:** Time period and frequency for repeated marketing activities; package size for marketing activities that are carried out in packages

9. Save the record.

## Defining the Marketing Activity Format

You can define further details in the marketing activity format:

To define a marketing activity format:

1. Click on **Create / Edit Format**) in the execution record's header.
2. Determine how to contact your target group under **Preferred Channel**:
  - **Fixed:** The channel used for all recipients (phone, letter, e-mail, SMS, fax).
  - **Variable:** The channel entered as the **Preferred Channel** for the person is used (assuming that the necessary information is also present, e.g. an e-mail address).
3. If activities, mailings and/or incidents should be generated within the scope of the marketing activity, enable the corresponding options under **Generate**. Activities are added as appointments for the telemarketing reps or account managers. Incidents contain tasks to be executed within the scope of regular customer appointments as the result of an even, e.g. a customer's birthday, >> [Incident Management – FSI](#) on page 258. Mailing records provide a log of mailings, the responses and the results of a letter or e-mail.

---

**Note:** Select **Work Order** to generate incidents.

---

- If you have selected a fixed channel or not specified a channel, select the appropriate type (e.g. **Activity** for the phone channel).
  - If you have chosen variable channels, select all the applicable options. The first option that is selected in the order mailing, activity, work order is taken into account (when using the phone channel, only activity or work order).
4. Use the tabs in the lower portion of the screen to determine further settings for all channels apart from "Phone":
- **Transfer Fields:** Select the predefined transfer fields, >> [Planning and Preparing Marketing Activities](#) on page 332. These fields are transferred to the mail merge document or control file when generating the activity.
  - **Company & Person** and **Company:** Select the label (for printed labels and greetings in letters, faxes, SMS and e-mails) to use if no label is entered for the company or person: The label selected in the **Company & Person** field is used for person-specific letters and the label selected in **Company** is used for company-specific letters.
  - **Additional Address:** The additional address selected here is used. If no additional address is defined for a recipient, the normal address is used.

E-mail mailings are sent only to those recipients for which an e-mail address has been entered. The e-mail fields are used in the following order:

For persons:

1) **E-mail**

2) **E-mail 2**

3) If an address type has been selected in the **Additional Address** field, the first additional address found for the person is used.

4) The e-mail address of the person's company (determined as described below).

For companies:


1) If an address type is selected in the **Additional Address** field and an address of the same type exists for the company in the **Additional Address** info area, the e-mail address entered there is used.

2) **E-mail**

3) **E-mail 2**

If none of the fields contains an e-mail address, no e-mail will be sent to this company or person.

- **Ignore assigned labels:** Replaces the label formats defined for companies and/or persons by a uniform label format.

- **Language Transformation:** All catalog values are transferred to Microsoft Word in the language entered for the person.
  - **Format:** The control file's format:
  - **Variable field length/Fixed field length:** Determines whether records are output with separators or using a fixed field length.
  - **Assign numbers:** Records are numbered sequentially.
  - **Separator:** Select the characters used as separators in the control file: Specify the separator between each **Record** and **Field**, and the **Field border** (at the start and end of a field).
5. Save the record and click on  (**Back**). The marketing activity format is transferred to the **Marketing Activity Format** field in the execution record.

## Creating Target Groups

To create a target group:

1. Click on **Create Target Group** in the execution record's header.

If you do not create the target group yourself, it is automatically generated at the point in time specified in the execution record (**Start on/at** fields).

The reps that have been assigned to editing the target group receive a To-Do once the target group has been generated.

## Editing Target Groups

If you have been assigned to editing the target group, you will receive a To-Do once the target group has been generated.

To edit a target group:

1. Switch to the **Target Group\_** tab in the marketing activity or switch to the **Target Groups** node in the tree.


The target group generated automatically is displayed.

2. Edit the target group:

- Click on ,  or  to add further records to the target group.

Start the search and select one or more records in the results list. Select **Select** from a selected record's context menu.

The selected records are added to the target group.

- Click on  (**Set Inactive**) to remove one or more records from the target group.



Always set the records that should not be included in the target group to **Inactive** instead of deleting them from the target group. This ensures that another user will not add the record to the target group a second time.

## Executing Marketing Activities

You can execute a marketing activity as follows:

- Click on **Start Marketing Activity** in the execution record's header.
- If you do not start the activity manually, CRM.server executes the marketing activity at the point in time defined in the execution record (**Execute activity on/at** fields).

The following actions are performed:

- E-mails or SMS are sent to the target group and related information is stored in a mailing record.
- Activities and incidents are generated for further processing.
- Control files for mail merges and faxes are created.

Check whether the generation was successful:

- If a target group exists, the **Executed** check box is automatically enabled for each record that is processed successfully.
- A log entry is added each time that records are generated for the marketing activity (accessible on the **Logs** tab)

You can now edit the generated data:

- Edit the generated activities, incidents and mailings as necessary, [Editing Generated Records](#) on page 341.
- Click on **Create Letter** in the marketing activity's header to combine the generated control file with the document in the **Letter: Template Document** field.

## Editing Generated Records

To edit the records generated for a marketing activity:

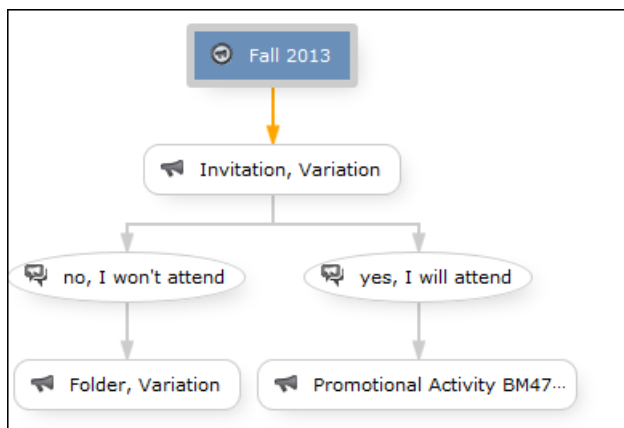
- Contact the recipients and store their response(s) in the **Response 1 (Marketing Act.) - Response 5 (Marketing Act.)** fields in the activity or mailing. If a follow-up marketing activity is defined for the response, the customer/prospect is immediately assigned to the follow-up marketing activity's target group. The result defined for

the response in the **Result** field in the response is transferred to the activity or mailing.

- Enter the time and/or duration in the activity record.
- Set the status of the activity to "Completed" and enter the appropriate result (e.g. "Successful").

## Campaign Chart

Click on the **Chart** tab the tree view of a campaign to display the structure of the campaign graphically.



The following options are available:

- Drag the graph to move it.
- Use your mouse wheel to zoom.
- Double-click in an empty area of the graph to revert the zoom level to 100%.
- Double-click on an element in the graph (campaign, marketing activity or response) to open the corresponding record.

## Monitoring Results

You can monitor the success and status of campaigns and marketing activities by performing calculations.

1. Click on  (**Calculate**) in the campaign or marketing activity record.

Based on the responses received, the success of a marketing activity is determined by comparing the actual results with the target results. The success of a campaign is calculated based on the success of the individual marketing activities that make up the campaign.

The statistics for a marketing activity are available from the **Statistics** tab and contain information on the number of responses, the points scored and statistics concerning the records generated within the scope of the marketing activity. You can edit the **Weighting** field in the statistics to determine the weighting of the marketing activity within the campaign's statistics.

The statistics for a campaign are stored on the **Success (Overview)** and **Success (Details)** tabs in the campaign record and include details on the target number of records and the total points scored by the responses. Furthermore, an overview of the associated costs in the default currency is available on the **Target Group Size & Costs** tab.

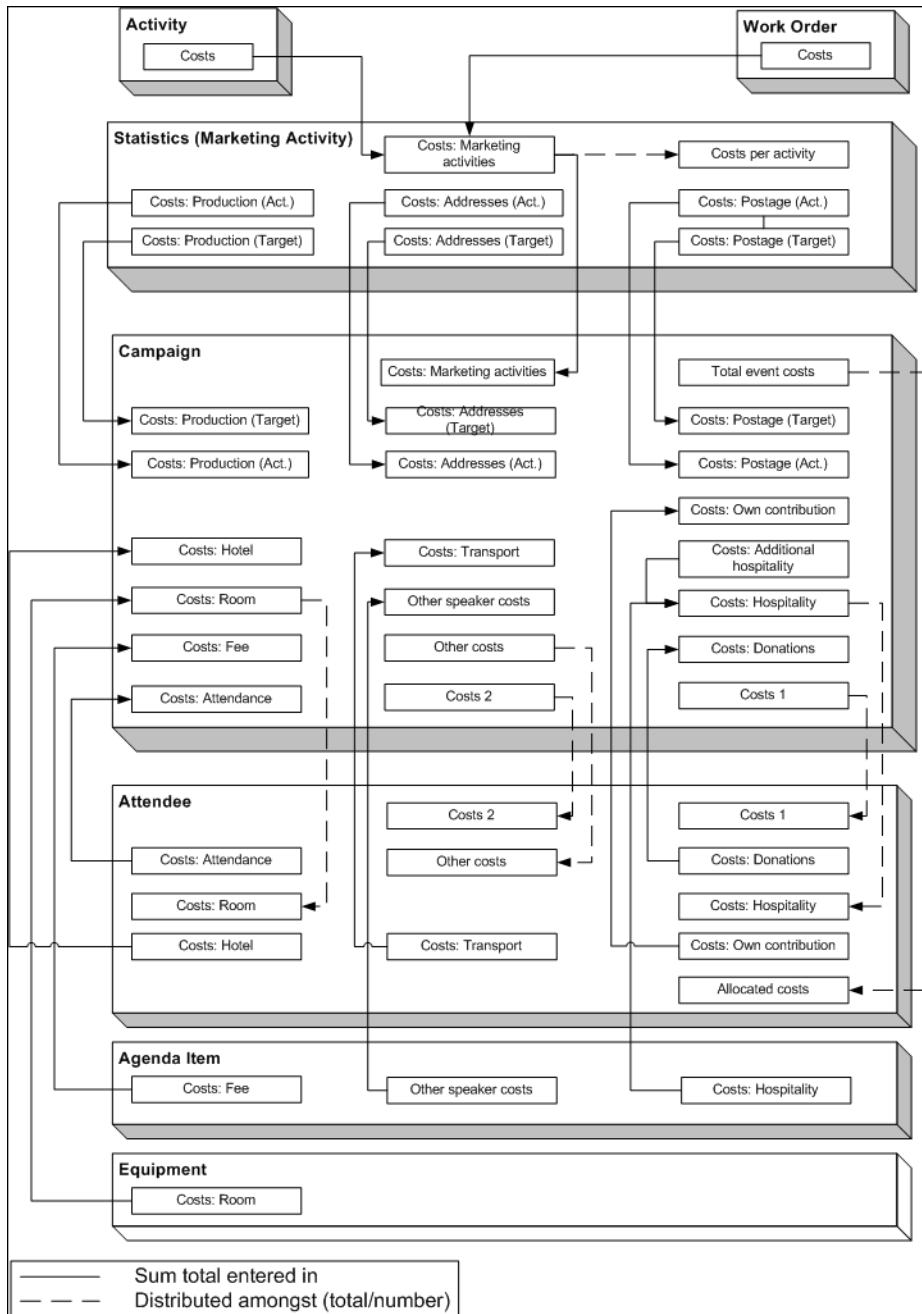
The charts on the following pages illustrate how costs and points are calculated for individual fields.

Further data is available in the campaign analysis. To carry out the campaign analysis:

1. Switch to the **Analyses** node in the campaign's tree view.

You can display information on participants and activities in the campaign according to their status.

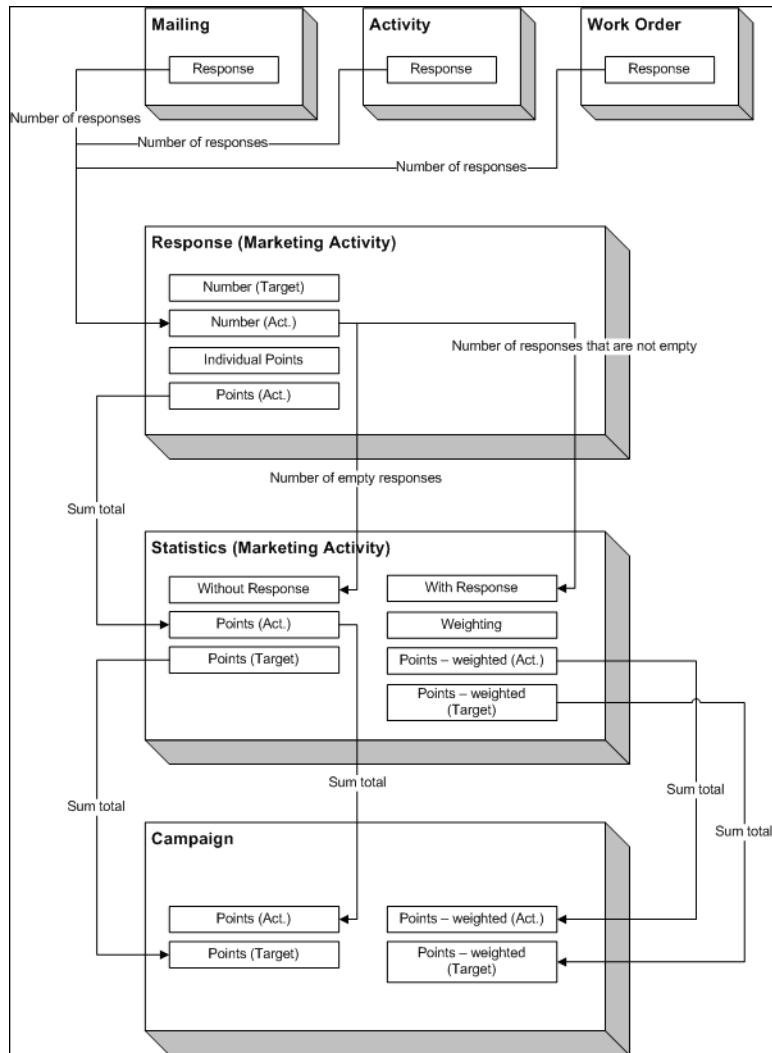
# Costs



Campaign costs calculated based on data entered in the **Attendee**, **Agenda Item** and **Equipment** info areas are updated whenever you add a new record or edit an existing one. You can also click on **Calculate** in the **Campaign** info area to calculate the costs.

Costs related to the campaign that are distributed amongst attendees with the participation status "Participated" are not updated automatically. Click on **Calculate** to distribute these costs.

# Points



## Campaign and Marketing Activity Templates

Templates make it easier to add campaigns and marketing activities that you need to add regularly and are similar. When adding a campaign or marketing activity, you can select a template. The data entered in the template is automatically transferred to the new campaign or marketing activity, including data such as responses, participants etc. You can then edit the data as required by the new campaign or marketing activity.

**Note:** If you are porting campaign templates between development and production systems, ensure that the field numbers 4 and 15 in the Activity Execution (AD) record are empty. If they are not empty, then after porting, manually update field number 5, else the execution of marketing activities will fail.


Document templates are used to create mass mailings and e-mails. Enter the desired document template in the marketing activity.


You can add new templates and edit existing documents, >> [Adding and Editing Templates](#) on page 346.

## Adding and Editing Templates

To display templates:

- Select  (**Marketing**) > **Campaign Templates**.
- Select  (**Marketing**) > **Marketing Activity Templates**.

Click  (**New**) to add a new campaign or marketing activity. Enter "Template" in the **Status** field.

- Select  (**Collaboration**) > **Documents** and search for one of the following documents:
  - CORE\_Confirmation\_E-Mail.htm: Contains a short text used to confirm the registration for an event. Text is included for both English and German. The appropriate language is used based on the language entered for the recipient (English is used as the fall-back option).
  - CORE\_ProductInformation\_E-Mail.htm: Contains a short text (English and German) used to inform the recipient of a new product. Two possible replies are included in the text as links.
  - CORE\_English\_Invitation.doc: CORE\_English\_Invitation.doc contains a short invitation text and incorporates several fields in the database.

These documents are read-only. To edit these document templates:

1. Select **Open document** from the document's context menu
2. A Microsoft Word message may be displayed if you are opening a Word document. Confirm with **Yes**.
3. The document is opened in the associated application.
4. Edit the document:
  - a. You can edit the text.
  - b. You can add additional fields to the document (**Mailings** tab, **Insert Merge Field** option).
  - c. HTML files may contain additional fields in comments.

- d. Save the document locally.
- e. You can either directly enter the updated document in a marketing activity execution record or first upload it to the Aurea CRM database (**Documents** info area), >> [Document Management](#) on page 265.

---

**Note:** Contact your administrator for details on the meaning of the field codes.

---

## Predefined Campaign Templates

The following predefined campaign templates are available:

### Product Promotion

Contains an marketing activity that sends an e-mail to the target group with a follow-up by telephone or a personal consultation depending on the response to the e-mail.

- "Product Information" marketing activity: This marketing activity sends out e-mails and create activities. The target group is created using a query. The activity uses the CORE\_ProductInformation\_E-Mail.htm document template to send out the e-mail.

Three responses are defined: The response "Interested" assigns the respondent to the "Consultation" marketing activity; "No response" assigns the recipient to the "Follow-up" marketing activity; "Not interested" has no follow-up marketing activity.

- "Follow-up" marketing activity: Creates telephone activities; the target group is generated automatically for those recipients where "No response" is entered in the "Product Information" marketing activity.

Three responses are defined: The response "Interested" assigns the respondent to the "Consultation" marketing activity; "No response" assigns the recipient to the "Follow-up" marketing activity; "Not interested" has no follow-up marketing activity.

- "Consultation" marketing activity: Creates visit activities; the target group is generated automatically for those respondents who replied with "Interested" to either the "Product Information" or "Follow-up" marketing activity.

### Event

- "Invitation" marketing activity: This marketing activity creates activities and letters. The target group is created using a query. The activity uses the CORE\_English\_Invitation.doc. document template for the letter.

Three responses are defined: The response "Accepted" assigns the respondent to the "Confirmation" marketing activity; "No response" assigns the recipient to the "Follow-up" marketing activity; "Declined" has no follow-up marketing activity.

- "Follow-up" marketing activity: Creates telephone activities; the target group is generated automatically for those recipients where "No response" is entered in the "Product Information" marketing activity.

Three responses are defined: The response "Interested" assigns the respondent to the "Confirmation" marketing activity; "No response" assigns the recipient to the "Follow-up" marketing activity; "Not interested" has no follow-up marketing activity.

- "Confirmation" marketing activity: Creates e-mail activities; the target group is generated automatically for those respondents who replied with "Accepted" to either the "Invitation" or "Follow-up" marketing activity. The e-mail document template CORE\_Confirmation\_E-Mail.htm is used by this marketing activity.

Only one response is defined, "OK", which assigns the respondent to the "Event" marketing activity.

- "Event" marketing activity: This marketing activity corresponds to the actual event. The target group is made up of those respondents whose responded with "OK" to the "Confirmation" marketing activity.

Two responses are defined: "Attended" and "Did Not Attend". 50 points are assigned to the "Attended" response.



# 12

## Campaign Management (Enterprise CRM) – LSI and FSI

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Learn to design and manage marketing campaign in Aurea CRM.

### Campaign Management (Enterprise CRM) overview

The Campaign designer allows you to quickly create a campaign in an intuitive way and uses a graphical representation to make the campaign design process simple.

You can create campaigns and their marketing activities with clear representation of the works flows involved. Campaigns, marketing activities, and response are represented as containers in the graphical view.

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**Note:** Campaign management is an enterprise feature, you need to have enterprise license for Aurea CRM to use this feature.

---

Components of the Campaign Management:

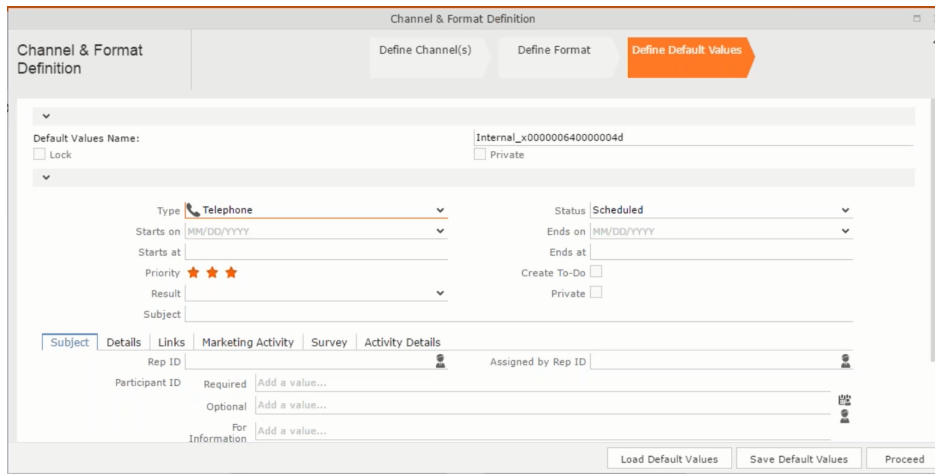
- Campaign calendar
- Campaign Designer

### Working with Campaign Calendar

The campaign calendar shows all the campaigns and marketing activities.

You can start a new campaign from this window by clicking the Create New Campaign button. You can also select and open a campaign shown in this window to open it in the campaign designer.

The following screenshot shows a campaign calendar.



The campaign calendar tab at the top is visible when you open any campaign.

## Working with Campaign Designer

You can create, edit, and delete campaigns and their marketing activities in the campaign designer.

You can create a new campaign using an existing campaign as a template or create a new campaign from scratch.

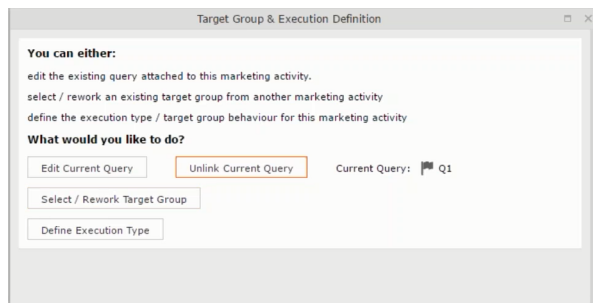
### Creating a new campaign from scratch

To create a new campaign from scratch, perform the following steps:

1. Click the Marketing menu icon, and select **New Campaign** from the menu.

Current Query: Q1

2. Click **Empty Campaign**.



3. Enter the following details in the New Campaign window:

---

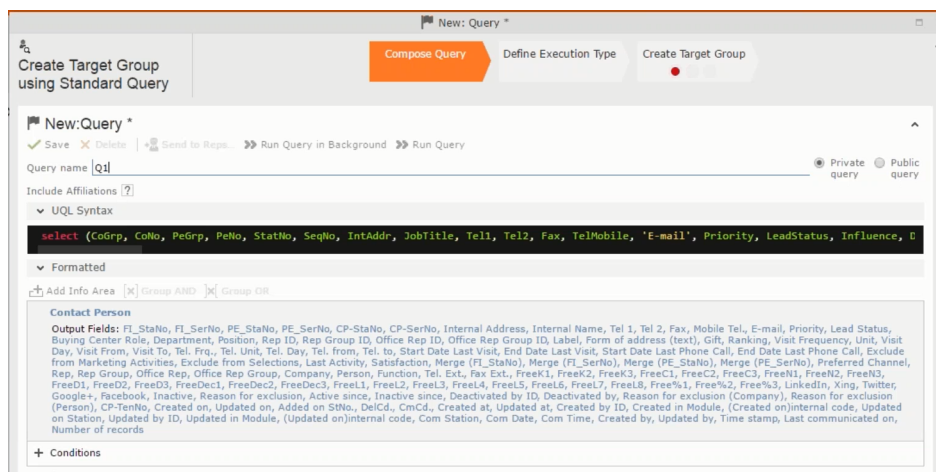
**Note:** All fields that are in orange are mandatory fields.

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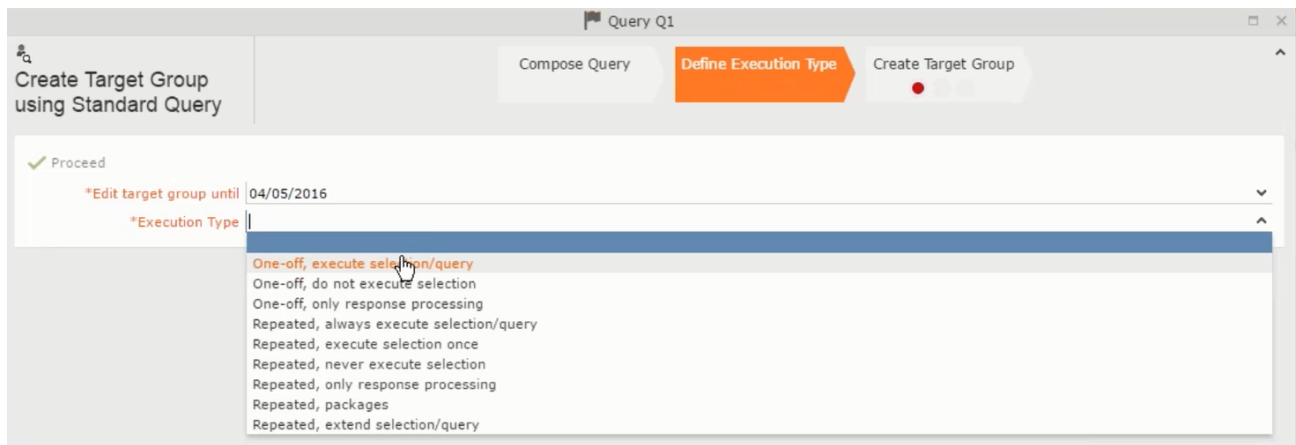
- **Name** – Enter a name for the campaign. (Mandatory field)
- **Starts On** – Enter the start date of the campaign. (Mandatory field)

- **Type** – Select the type of the campaign: Event; Questionnaire; or User Satisfaction. (Mandatory field)
- **Target Group Size (Target)** – Enter the number of recipients expected to participate in the campaign.
- **Ends On** – Enter the end date of the campaign.
- **Status** – Select the status of the campaign. (Mandatory field)
- **Costs**: Enter the estimated cost of the campaign.
- **Currency** – Enter the currency in which the campaign cost is estimated.
- **Resp.Rep ID** – Enter the ID of the responsible rep for the campaign.
- **Budget approval required** – Select the check box if an approval is required for the estimated budget of the campaign.
- **Verification required** – Select the check box if a verification is required for the campaign.

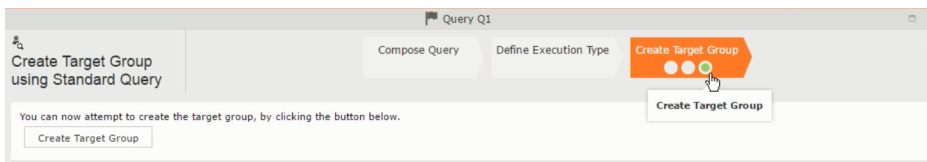
4. Click **Save**. The Campaign Designer opens.



5. To add marketing activity to the campaign, click the context menu on the right of the campaign container. You can select an existing marketing activity or create a new marketing activity from scratch.

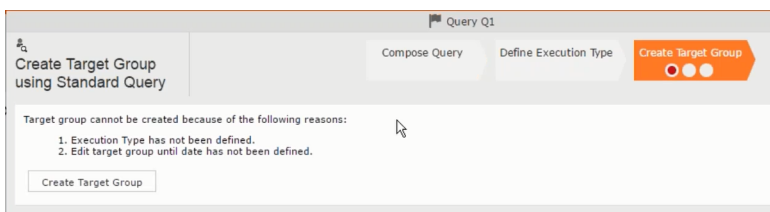


- To use an existing marketing activity:
  1. From the context menu select **Reuse Marketing Activity**. The **Reuse Marketing Activity** window opens. ✓ Proceed
  2. Search for the marketing activities from a campaign and select it from the search list.
  3. Enter a New Start Date for the marketing activity, in the resulting window.



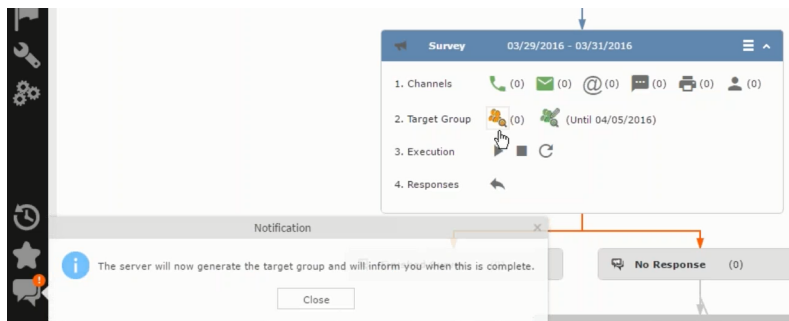
**Note:** If you do not provide a start date for the marketing activity then the start date on the reused marketing activity is used as start date.

4. Click OK. The marketing activity and its descendent marketing activities are added to the campaign designer.



5. Next you can make further additions to the marketing activity.

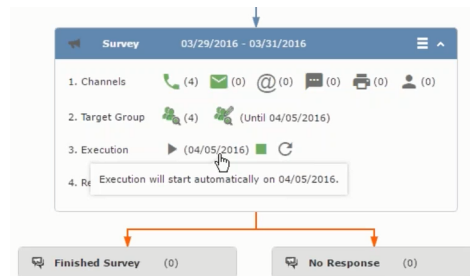
- To create a new marketing activity:
  1. From the context menu select **New Marketing Activity**. The **New Marketing Activity** window opens.



2. Enter the following details for the new marketing activity:

- **Marketing activity** – Select the marketing activity type from the following: Confirmation, Event, Follow-up, Invitation, Survey, Survey-remainder. (Mandatory field)
- **Starts on** – The start date for the marketing activity.
- **Ends-on** – The end date for the marketing activity.
- **Resp.Rep ID** – The ID of the rep responsible for the marketing activity.
- **Costs** – The estimated cost of the marketing activity.
- **Currency** – Select the currency the cost is estimated in.
- **Text** – Provide a description and other relevant information in this text field.

3. Click **Save** to create the new marketing activity container in the campaign



designer.

**Note:** A blue arrow points from the campaign container to the marketing activity container.

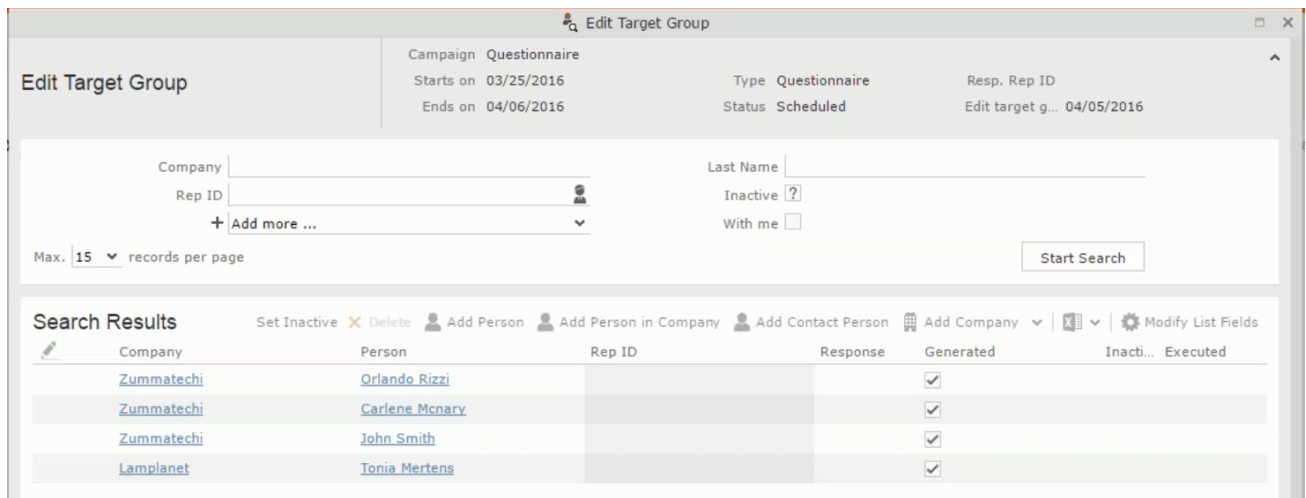
4. In the next step you need to define some responses for this marketing activity.

6. The context menu for the marketing activity container allows you to perform the following: Define responses, Channel and Format definition; Target group and Execution definition; Edit Target group; Notify Rep; Edit/View Responses (Activities); Edit the marketing activity; Delete; Delete (including Generated Record).

In this case we define a response to the survey marketing activity, we have defined.

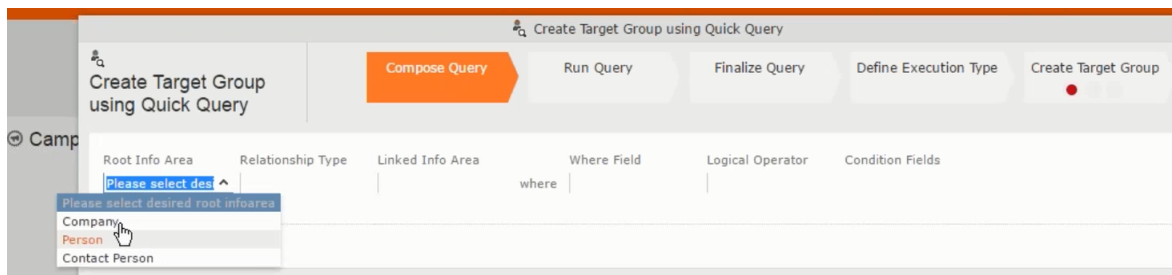


7. Select **Define Responses** from the context menu. A pop-up window is displayed.



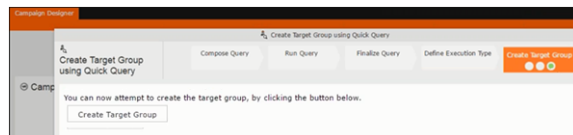
**Note:** The list of available responses are defined in the catalog entries for marketing activities. If no entries are present you get the catalog entries window and you have to define the response catalog entries in that window.

8. Select the responses you want to define and click **OK**. The responses are added to the graph view under marketing activity container.



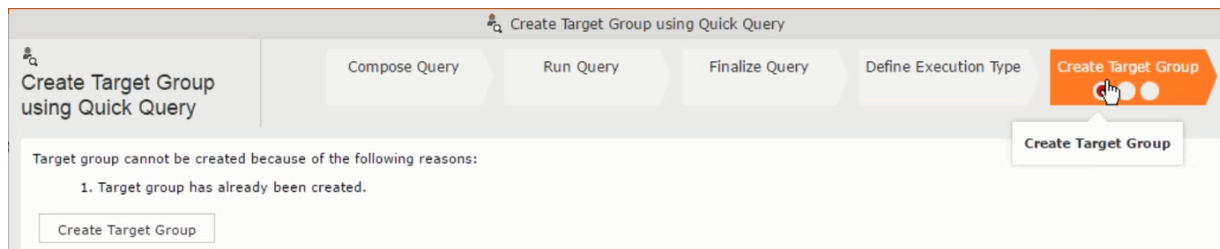
Now you can further define the follow-up marketing activity to the responses defined above.

9. To define a follow-up marketing activity, select the **Define Follow-up Marketing Activity** from the context menu for the **“No Response”** container. The **New Follow-up Marketing Activity** window displays.

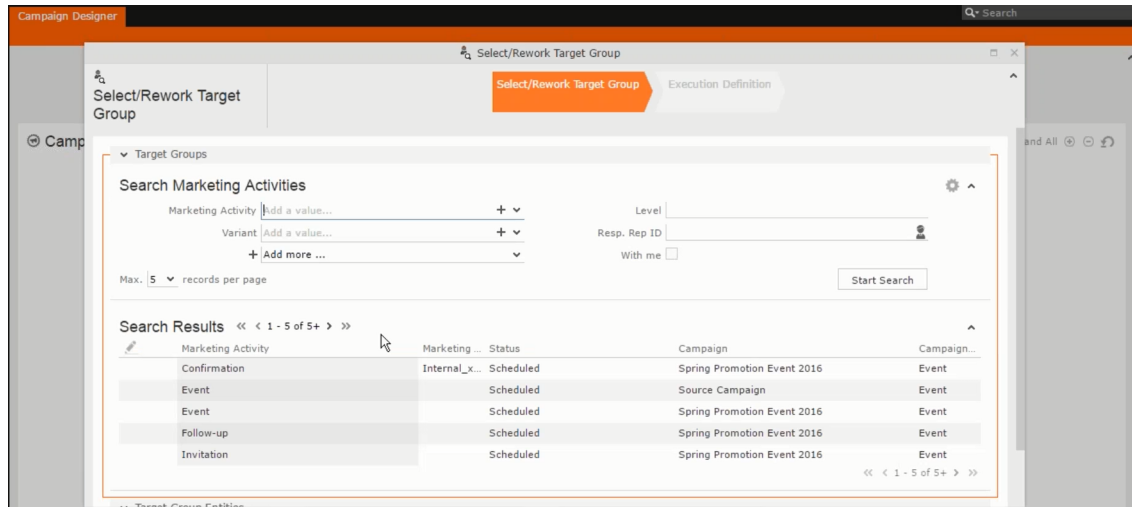


This window gives you the option to create a new follow-up marketing activity or use an existing one.

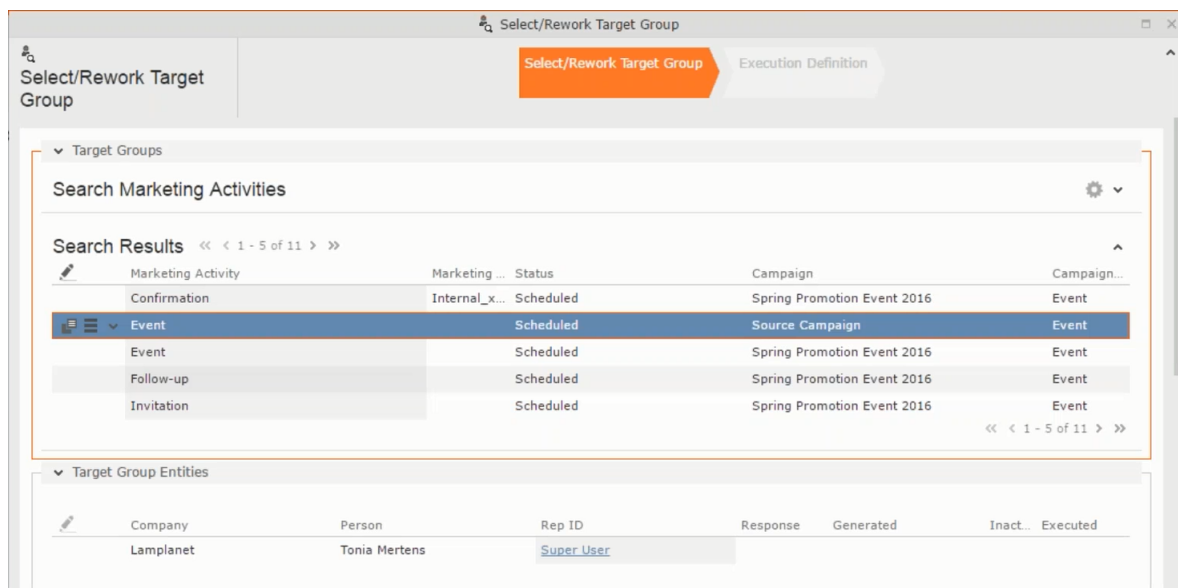
10. To create a new marketing activity or to reuse an existing one, perform the sub-steps described in step 5. In this case we add a follow-up marketing activity (**Survey Reminder**) to the **No Response** marketing activity.



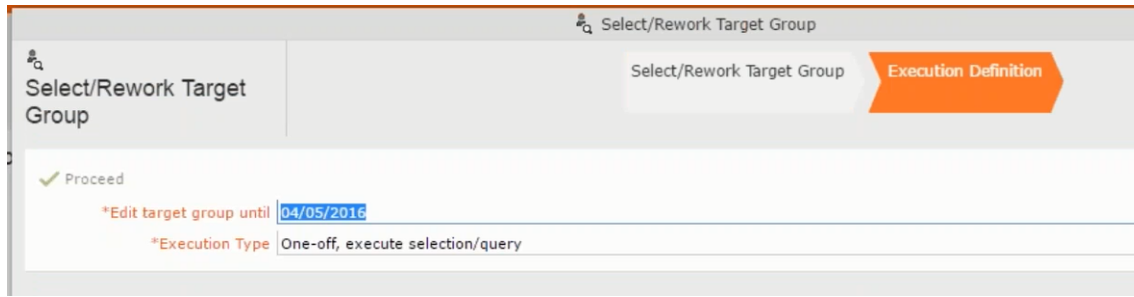
11. Next we define the responses to the **Survey Reminder** follow-up marketing activity. Select **Define Responses** from the context menu. The **Responses (Survey Reminder)** window opens.



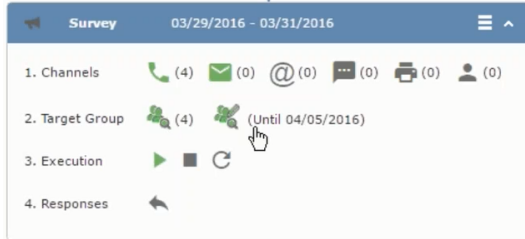
12. Select **Finished** and **No Response** options and click **OK**.



13. Next we want to send the survey reminder to those who have not responded. This loops the defined actions. To do this, select **Define Follow-up** marketing activity from the context menu of the **No Response** container.

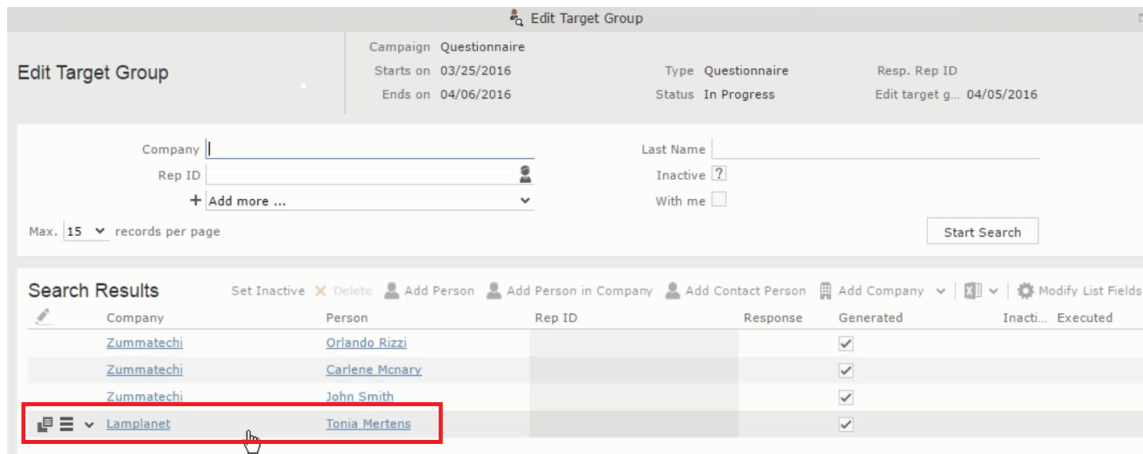


14. Click **Use Existing** button.



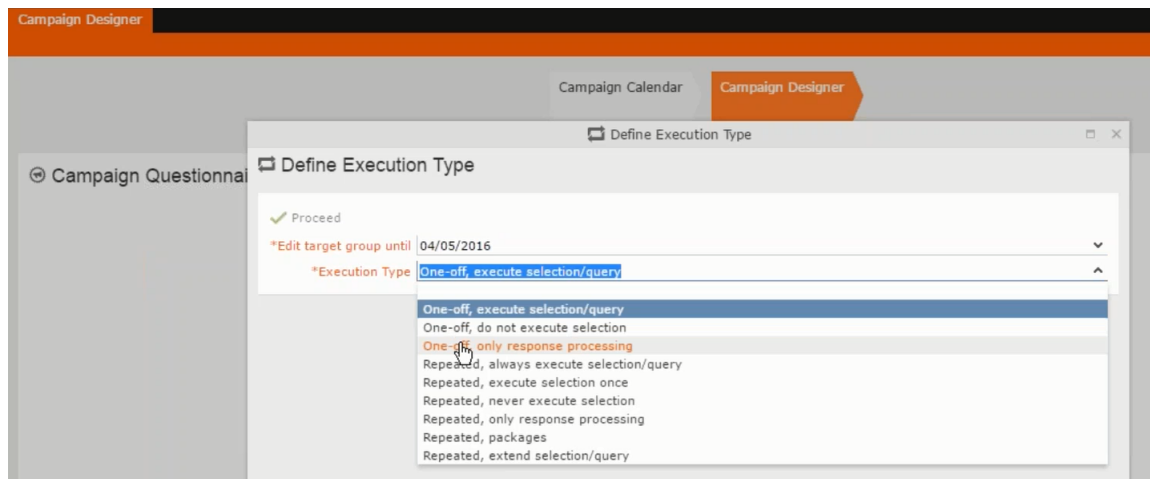
**Note:** Since we want to send a survey reminder from the same campaign named "Questionnaire" we restrict the search content to the **Questionnaire** campaign. By changing the **Context** to **Entire Database** you can search for and add marketing activity from other Campaigns. To do that it is recommended that you use the **Re-use Marketing Activity** function described in step 5.

15. Click **Start Search** and select **Survey Reminder** from the search result.



16. Next a confirmation follow-up marketing activity is added to the **Finished Survey** activity. To do this select **Define Follow-up Marketing Activity** from the **Finished Survey** context menu. To create a new marketing activity, perform the sub-steps described in step 5. In this case we add a new follow-up marketing activity (**Confirmation**) to the **Finished Survey** activity.

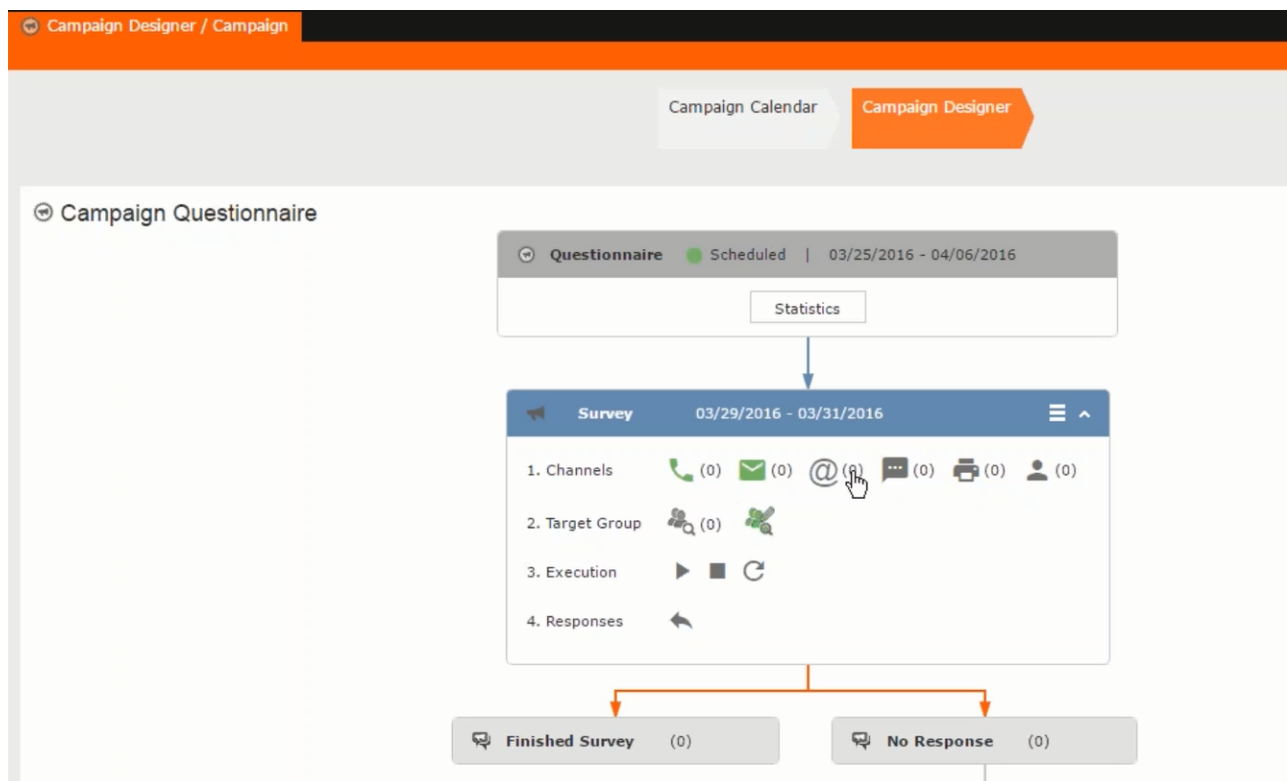




## Viewing a campaign

To view an existing campaign, perform the following:

1. Select **Campaigns** from the **Marketing** menu of CRM web.

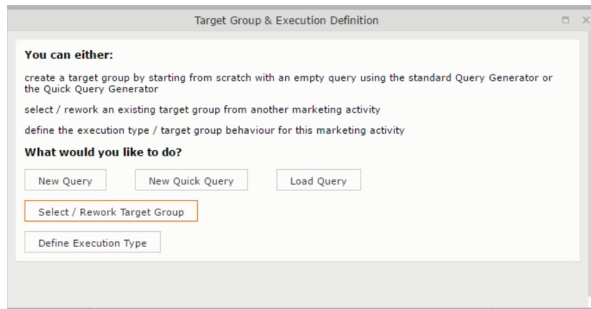


2. The **Search Campaigns** window opens. Enter the required criteria and click **Search**. The search results displays the list of campaigns.

(0)

Notice that the campaigns list shows the status and type of the campaign.

3. Select a campaign and double click it to open it in the campaign designer.



### Deleting a Campaign from designer

To delete a campaign from a campaign designer:

1. Open the campaign in a campaign designer.
2. Click the context menu from the campaign container.
3. Select the **Delete** option. The Question window pops up with the query “Do you really want to delete the selected record(s)?”
4. Click OK to confirm the deletion.

---

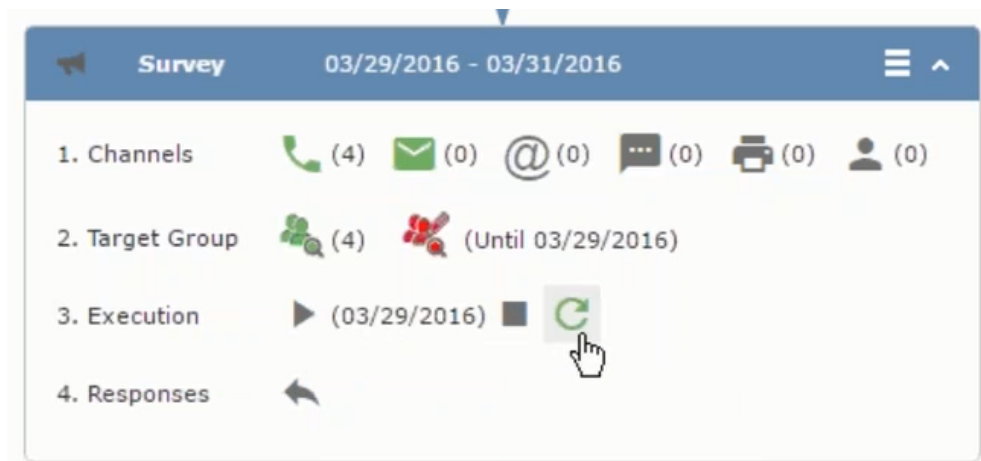
**Note:** Please note that this deletes the campaign along with all the activities in the campaign.

---

### Viewing the Campaign Statistics

To view a campaign’s statistics:

1. On the Campaign container, click to expand the container. The Statistics button is visible.



2. Click the **Statistics** button or select **Statistics** from the campaign container context menu.



**Note:** The statistics shown in the Statistics window is calculated in the Edit Campaign window, as shown in the screenshot below.

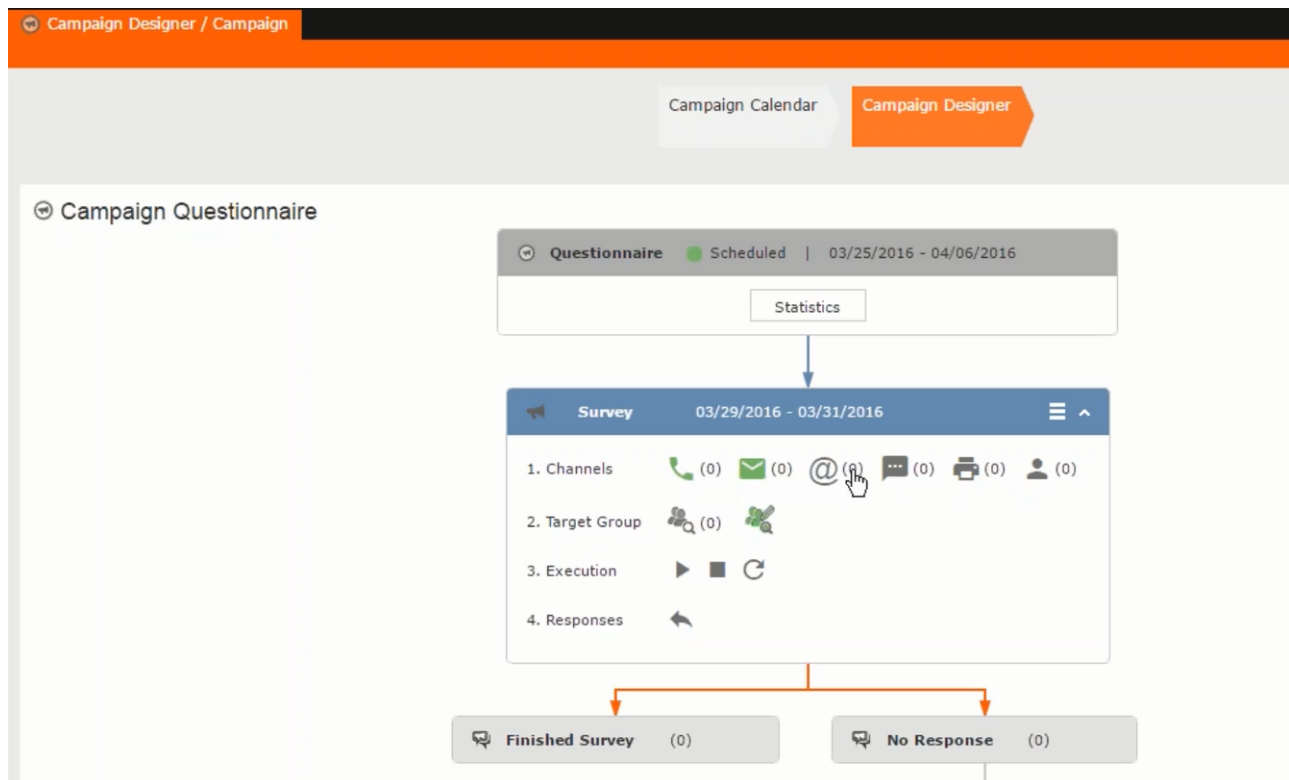


## Viewing a campaign

Learn how to view an existing campaign.

To view an existing campaign, perform the following:

1. Select **Campaigns** from the **Marketing** menu of CRM web.

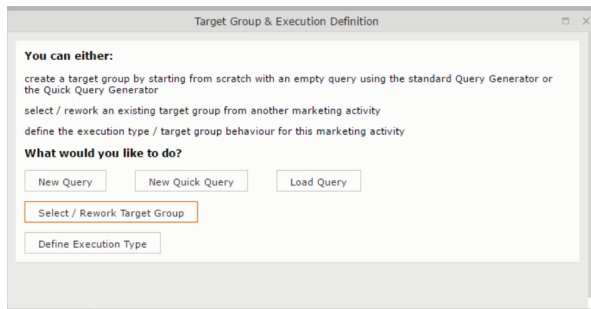


2. The **Search Campaigns** window opens. Enter the required criteria and click **Search**. The search results displays the list of campaigns.



Notice that the campaigns list shows the status and type of the campaign.

3. Select a campaign and double click it to open it in the campaign designer.



## Creating a new campaign from scratch

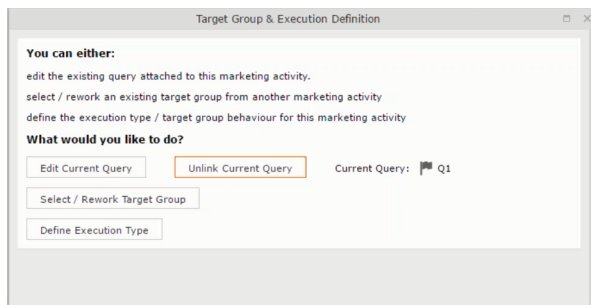
This topic guides you to create a new campaign from scratch.

To create a new campaign from scratch, perform the following steps:

1. Click the Marketing menu icon, and select **New Campaign** from the menu.

Current Query: Q1

2. Click **Empty Campaign**.



3. Enter the following details in the New Campaign window:

---

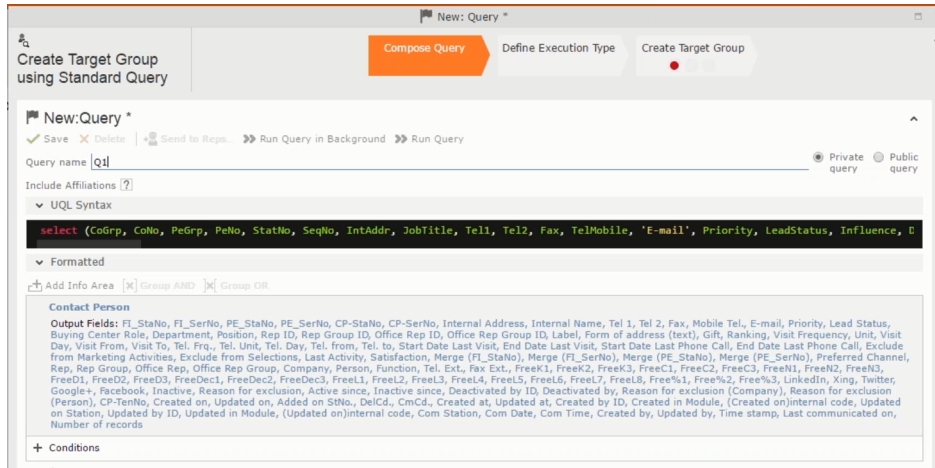
**Note:** All fields that are in orange are mandatory fields.

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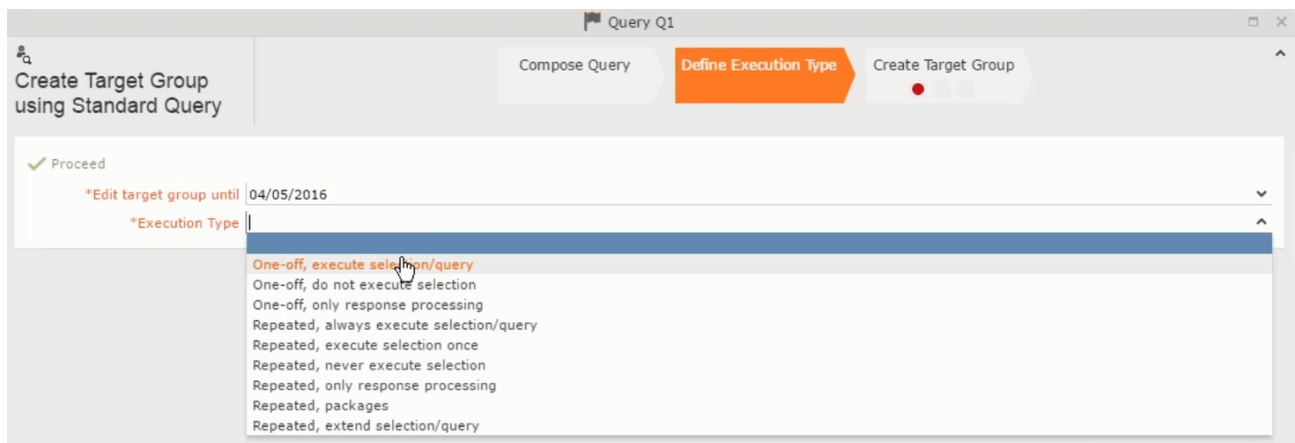
- **Name** – Enter a name for the campaign. (Mandatory field)
- **Starts On** – Enter the start date of the campaign. (Mandatory field)
- **Type** – Select the type of the campaign: Event; Questionnaire; or User Satisfaction. (Mandatory field)
- **Target Group Size (Target)** – Enter the number of recipients expected to participate in the campaign.
- **Ends On** – Enter the end date of the campaign.
- **Status** – Select the status of the campaign. (Mandatory field)
- **Costs**: Enter the estimated cost of the campaign.
- **Currency** – Enter the currency in which the campaign cost is estimated.
- **Resp.Rep ID** – Enter the ID of the responsible rep for the campaign.

- **Budget approval required** – Select the check box if an approval is required for the estimated budget of the campaign.
- **Verification required** – Select the check box if a verification is required for the campaign.

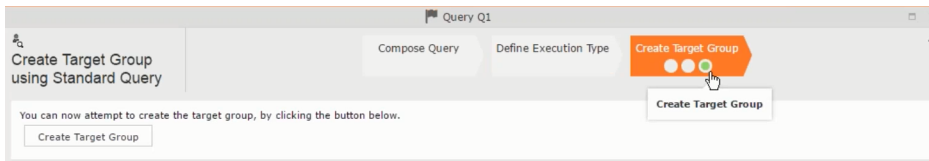
4. Click **Save**. The Campaign Designer opens.



5. To add marketing activity to the campaign, click the context menu on the right of the campaign container. You can select an existing marketing activity or create a new marketing activity from scratch.

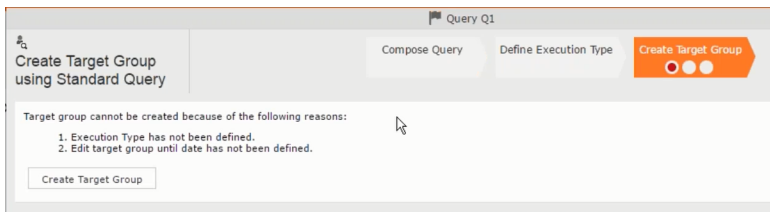


- To use an existing marketing activity:
  1. From the context menu select **Reuse Marketing Activity**. The **Reuse Marketing Activity** window opens. ✓ Proceed
  2. Search for the marketing activities from a campaign and select it from the search list.
  3. Enter a New Start Date for the marketing activity, in the resulting window.



**Note:** If you do not provide a start date for the marketing activity then the start date on the reused marketing activity is used as start date.

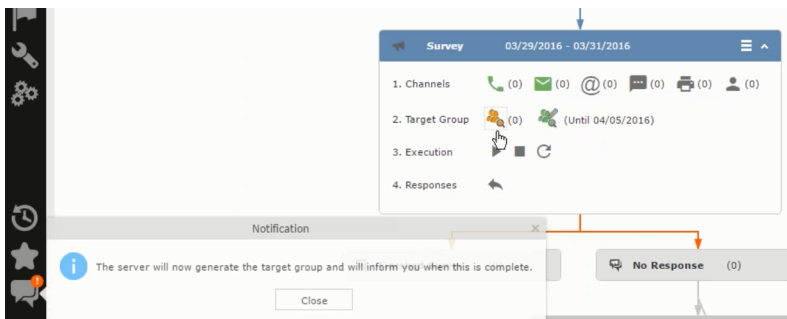
4. Click OK. The marketing activity and its descendent marketing activities are added to the campaign designer.



5. Next you can make further additions to the marketing activity.

- To create a new marketing activity:

1. From the context menu select **New Marketing Activity**. The **New Marketing Activity** window opens.

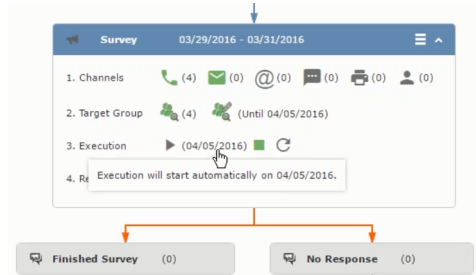


2. Enter the following details for the new marketing activity:

- **Marketing activity** – Select the marketing activity type from the following: Confirmation, Event, Follow-up, Invitation, Survey, Survey-remainder. (Mandatory field)
- **Starts on** – The start date for the marketing activity.
- **Ends-on** – The end date for the marketing activity.
- **Resp.Rep ID** – The ID of the rep responsible for the marketing activity.
- **Costs** – The estimated cost of the marketing activity.

- **Currency** – Select the currency the cost is estimated in.
- **Text** – Provide a description and other relevant information in this text field.

3. Click **Save** to create the new marketing activity container in the campaign



designer.

**Note:** A blue arrow points from the campaign container to the marketing activity container.

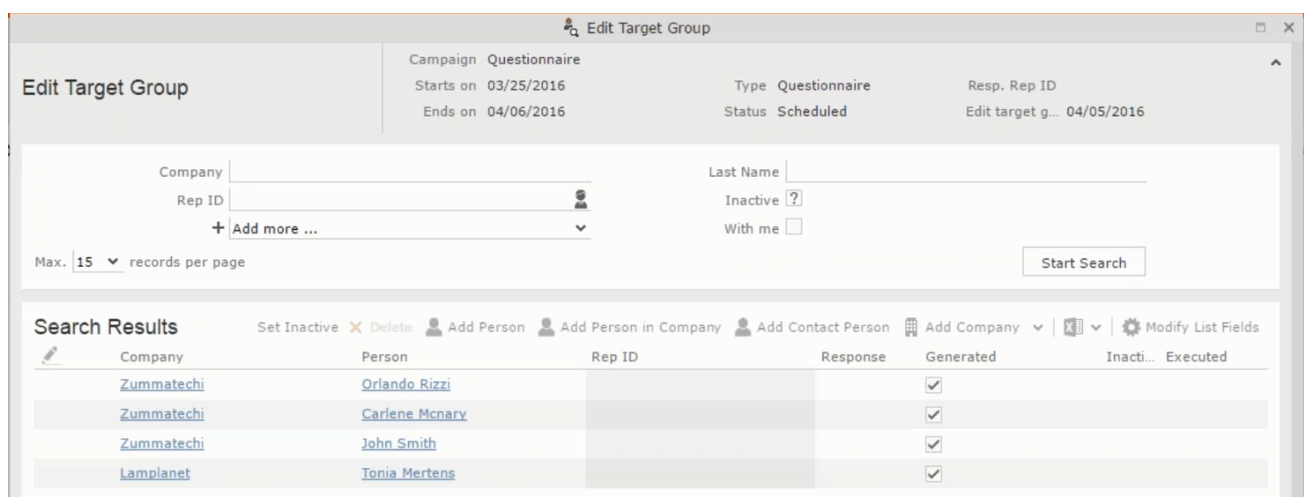
4. In the next step you need to define some responses for this marketing activity.

6. The context menu for the marketing activity container allows you to perform the following: Define responses, Channel and Format definition; Target group and Execution definition; Edit Target group; Notify Rep; Edit/View Responses (Activities); Edit the marketing activity; Delete; Delete (including Generated Record).

In this case we define a response to the survey marketing activity, we have defined.

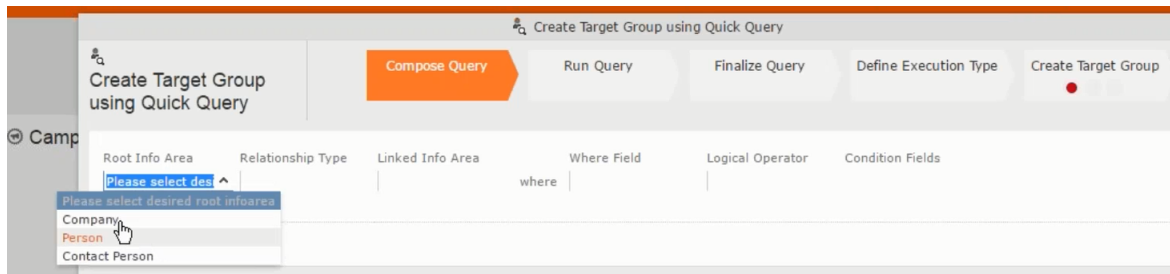


7. Select **Define Responses** from the context menu. A pop-up window is displayed.



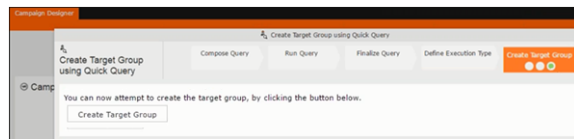
**Note:** The list of available responses are defined in the catalog entries for marketing activities. If no entries are present you get the catalog entries window and you have to define the response catalog entries in that window.

8. Select the responses you want to define and click **OK**. The responses are added to the graph view under marketing activity container.



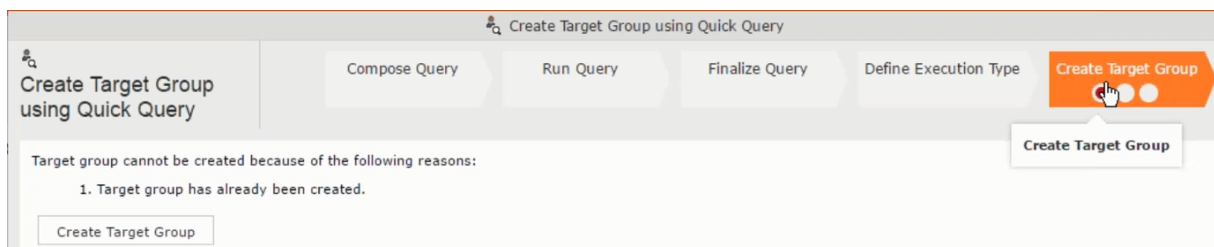
Now you can further define the follow-up marketing activity to the responses defined above.

9. To define a follow-up marketing activity, select the **Define Follow-up Marketing Activity** from the context menu for the **“No Response”** container. The **New Follow-up Marketing Activity** window displays.



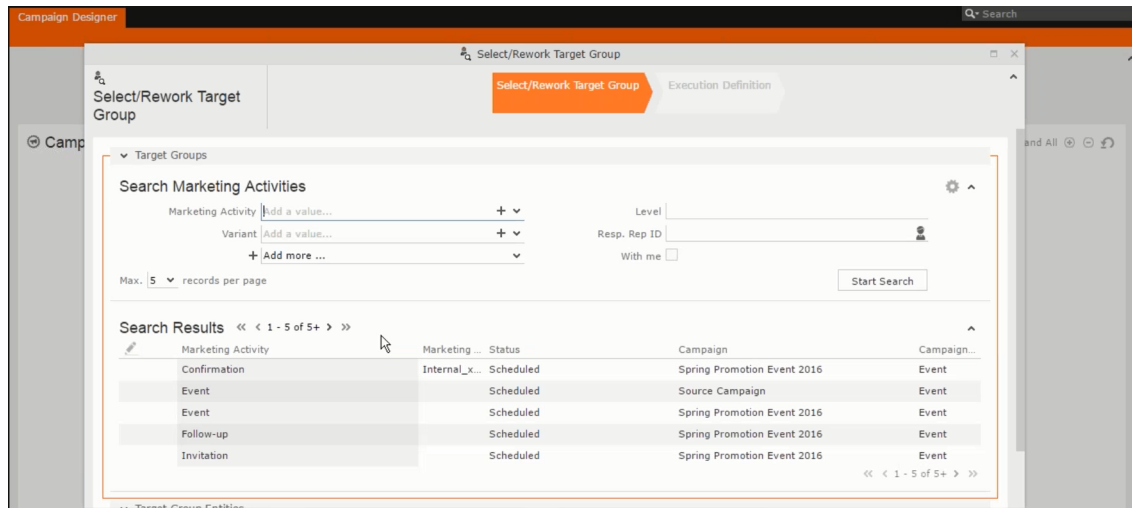
This window gives you the option to create a new follow-up marketing activity or use an existing one.

10. To create a new marketing activity or to reuse an existing one, perform the sub-steps described in step 5. In this case we add a follow-up marketing activity (**Survey Reminder**) to the **No Response** marketing activity.

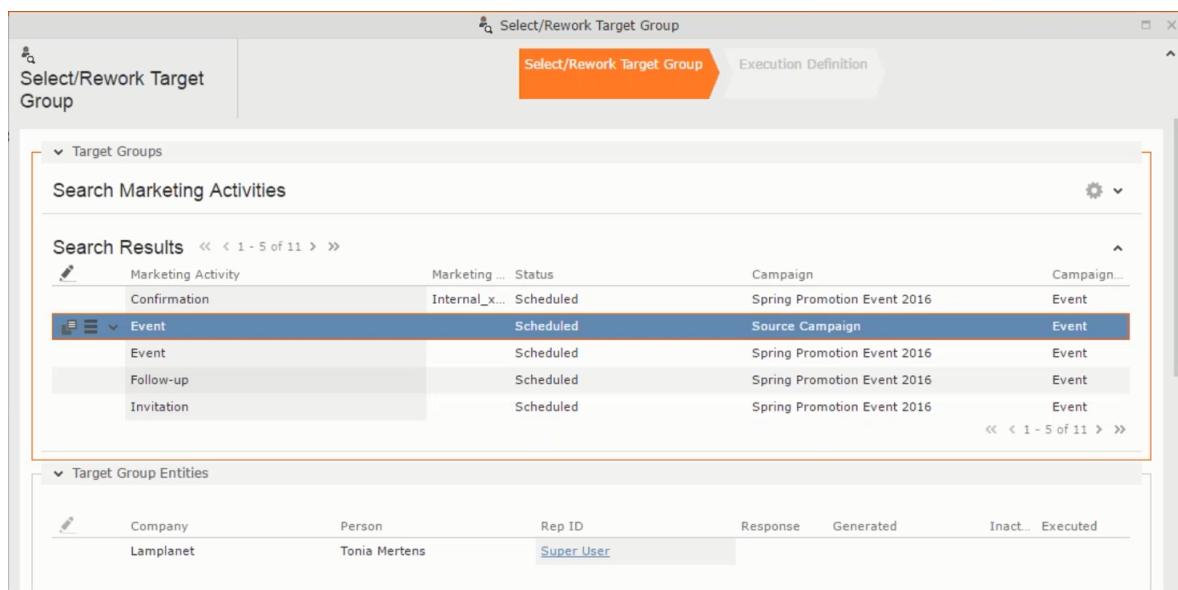


11. Next we define the responses to the **Survey Reminder** follow-up marketing activity. Select **Define Responses** from the context menu. The **Responses (Survey Reminder)** window opens.

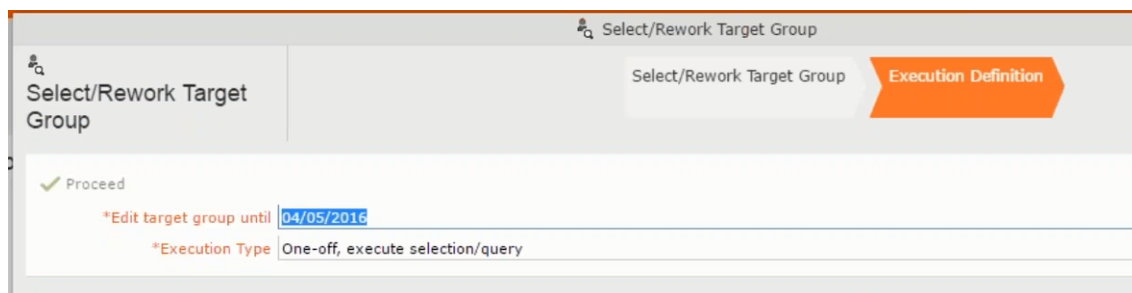




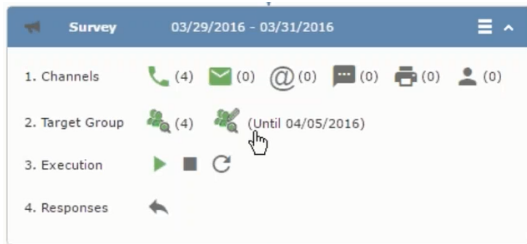
12. Select **Finished** and **No Response** options and click **OK**.



13. Next we want to send the survey reminder to those who have not responded. This loops the defined actions. To do this, select **Define Follow-up marketing activity** from the context menu of the **No Response** container.

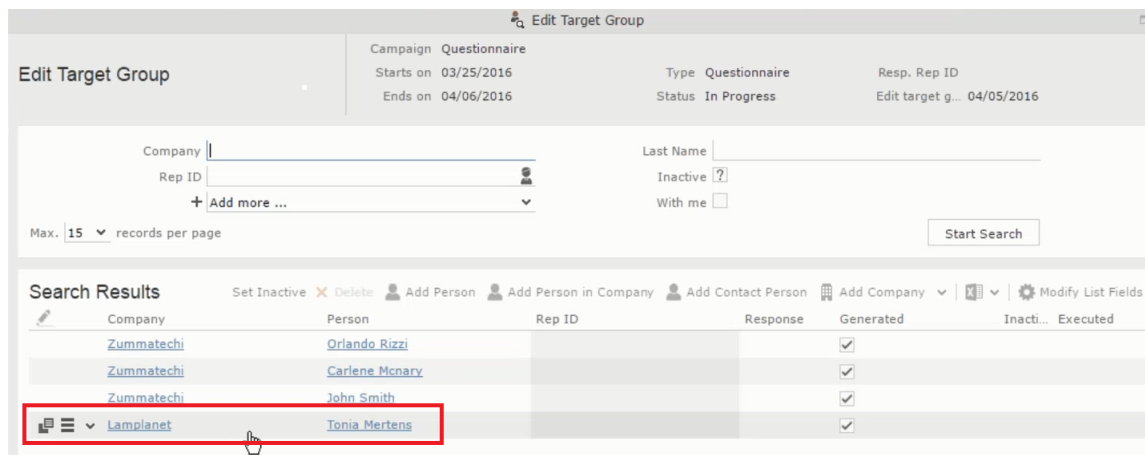


14. Click **Use Existing** button.

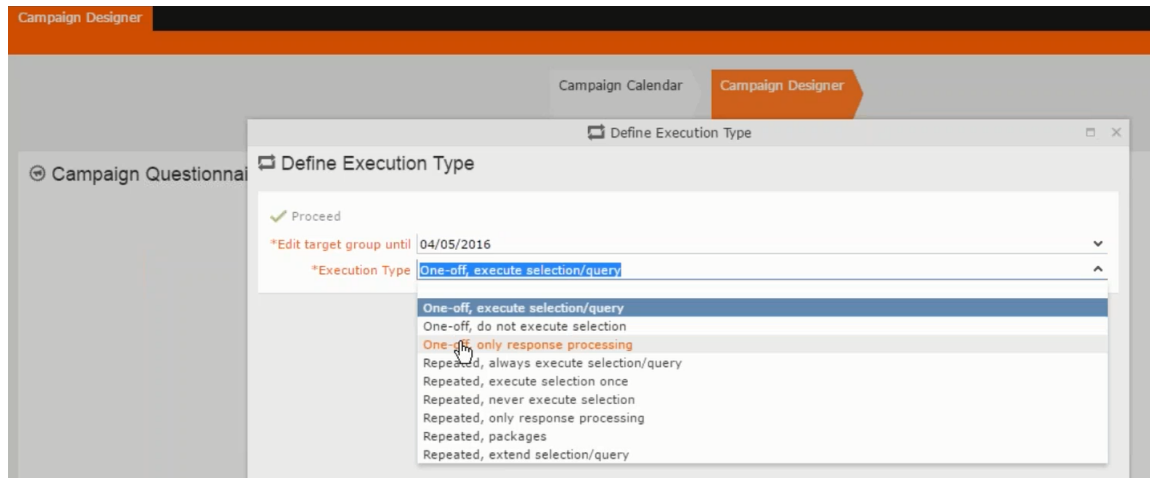


**Note:** Since we want to send a survey reminder from the same campaign named “Questionnaire” we restrict the search content to the **Questionnaire** campaign. By changing the **Context** to **Entire Database** you can search for and add marketing activity from other Campaigns. To do that it is recommended that you use the **Re-use Marketing Activity** function described in step 5.

15. Click **Start Search** and select **Survey Reminder** from the search result.



16. Next a confirmation follow-up marketing activity is added to the **Finished Survey** activity. To do this select **Define Follow-up Marketing Activity** from the **Finished Survey** context menu. To create a new marketing activity, perform the sub-steps described in step 5. In this case we add a new follow-up marketing activity (**Confirmation**) to the **Finished Survey** activity.



## Deleting a Campaign from designer

Learn to delete a campaign from designer.

To delete a campaign from a campaign designer:

1. Open the campaign in a campaign designer.
2. Click the context menu from the campaign container.
3. Select the **Delete** option. The Question window pops up with the query “Do you really want to delete the selected record(s)?”
4. Click OK to confirm the deletion.

---

**Note:** Please note that this deletes the campaign along with all the activities in the campaign.

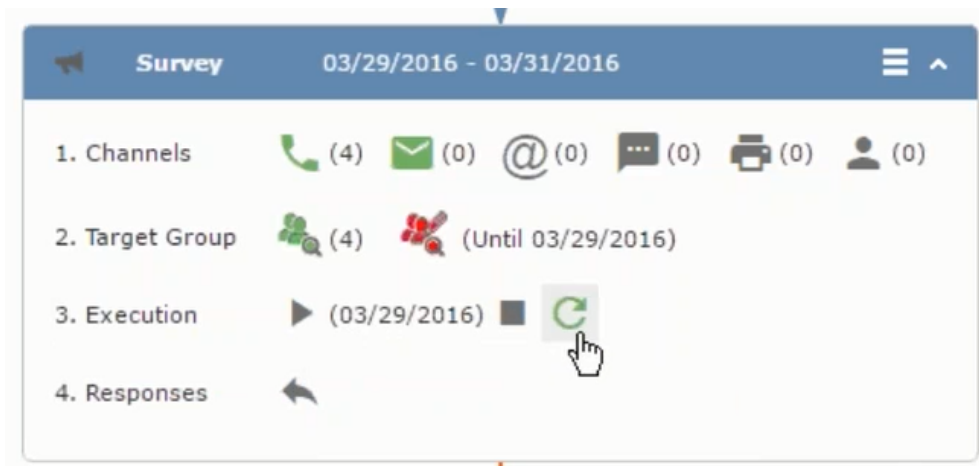
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## Viewing the Campaign Statistics

Learn to view campaign statistics.

To view a campaign’s statistics:

1. On the Campaign container, click to expand the container. The Statistics button is visible.



- Click the **Statistics** button or select **Statistics** from the campaign container context menu.




---

**Note:** The statistics shown in the Statistics window is calculated in the Edit Campaign window, as shown in the screenshot below.

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## Working with Marketing Activities

Learn to work with marketing activities.

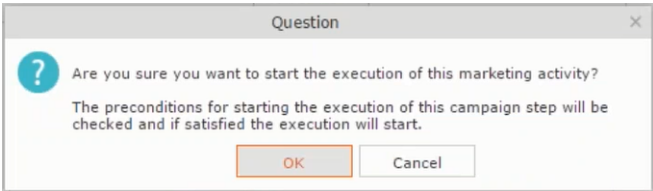
Creating a marketing activity involves the following steps:

- Creating channels and formats used in a marketing activity.
- Adding the target groups to the marketing activity, see [page 401](#).
- Defining the execution definition, see [page 401](#).
- Executing a marketing activity, see [Executing a Marketing Activity](#)
- Editing and viewing responses to a marketing activity, see [Editing/Viewing the Responses for a Marketing Activity](#)

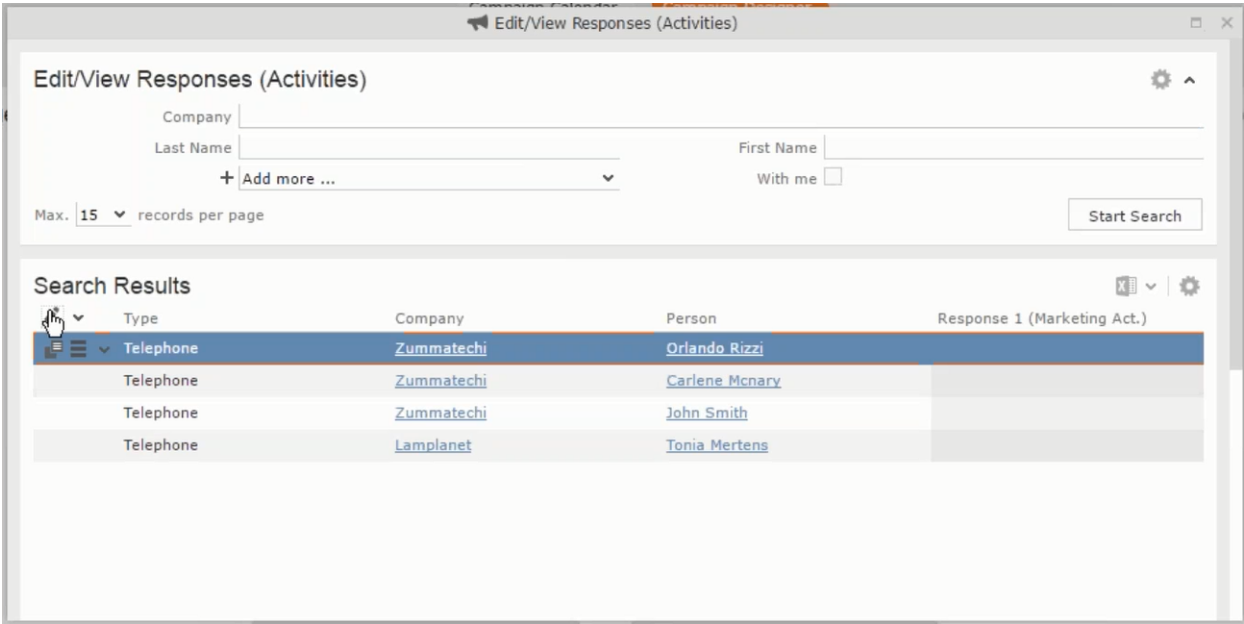
### Defining Channels and Formats used in a Marketing Activity

To define the channels and formats for a marketing activity, perform the following steps:

- Open the required campaign in the campaign designer.
- On the marketing activity container, click **OK** to expand the container.



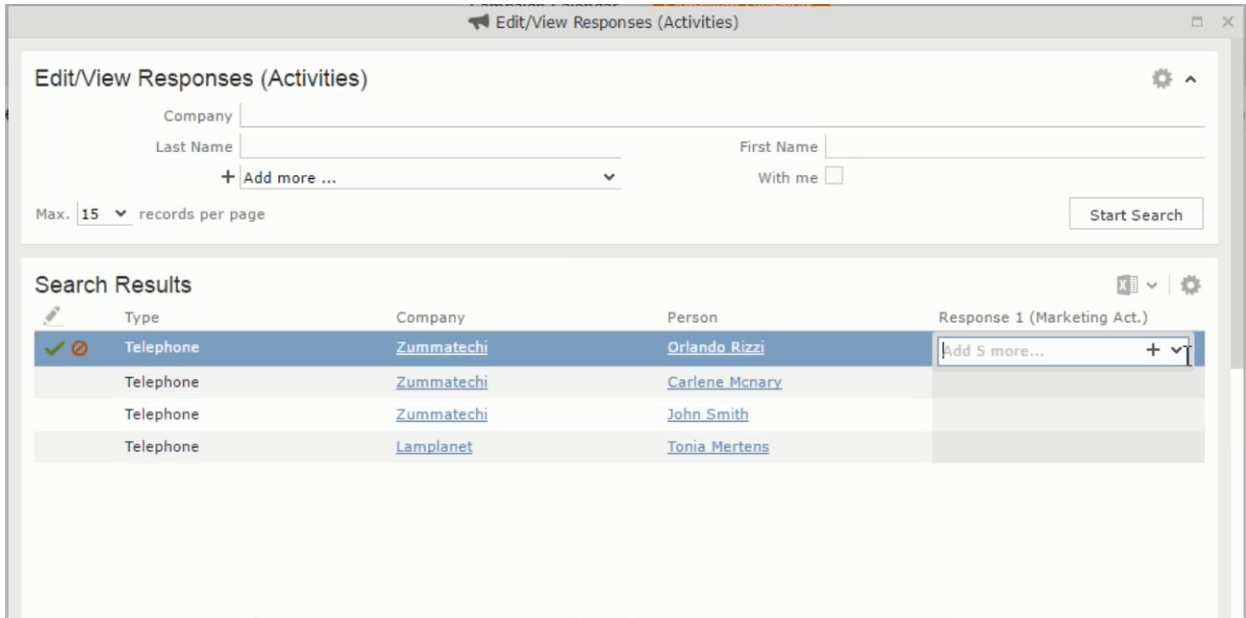
The following screenshot shows the **Survey** marketing activity container.



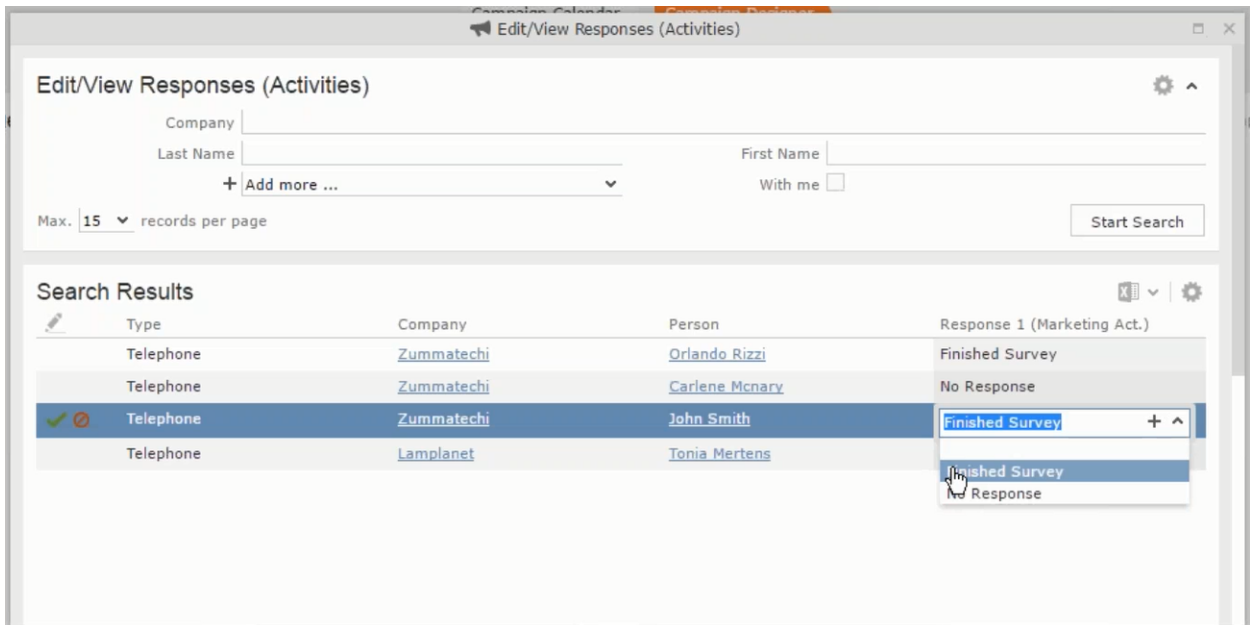
The following is a brief description of the components of a marketing activity:

**Channels** - The first row shows the available channels of communication for a marketing activity. The following channels are available:

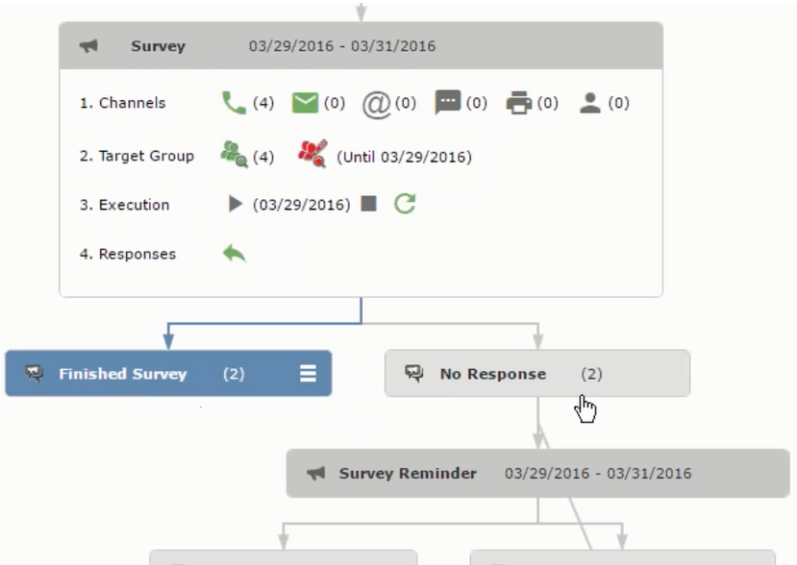
- Phone



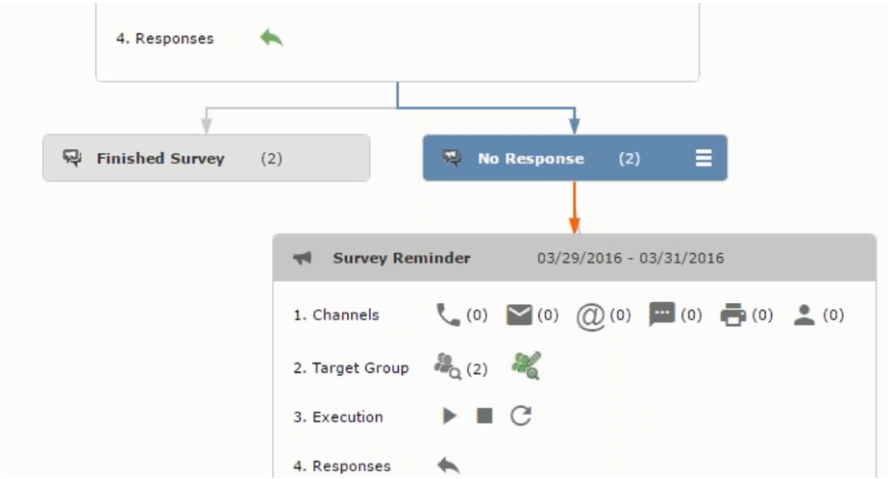
- Letter



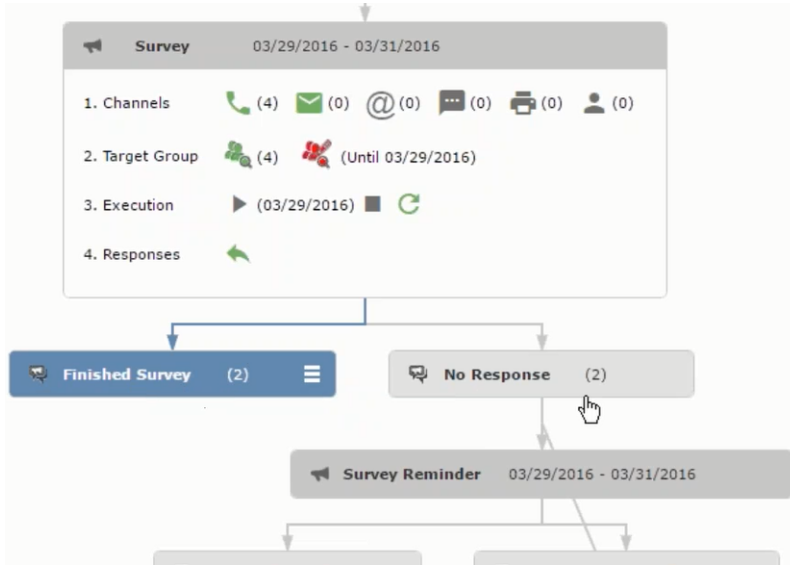
- Email



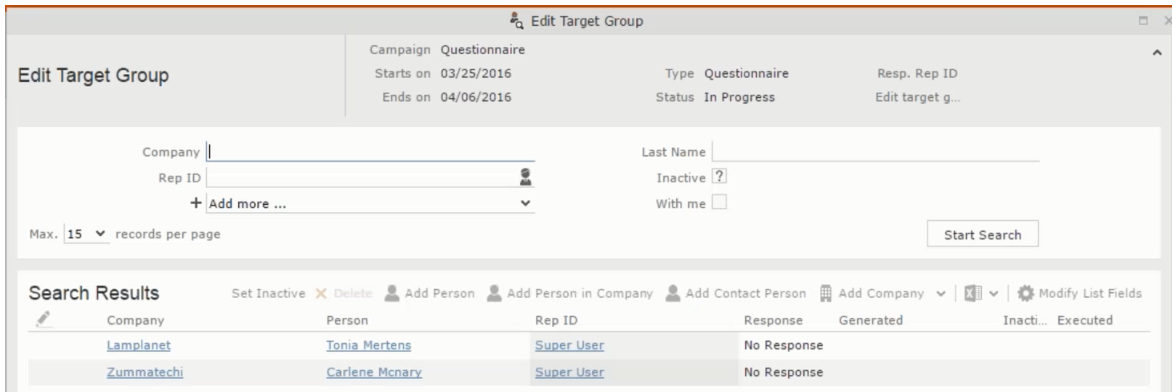
- SMS



- Fax



- In-person



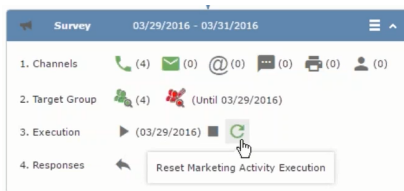
The numbers in brackets besides each channel represents the number of target group entities that is processed using this channel.

**Target Group** – In this step you can define the target groups (customers etc) who are to be the participants of this marketing activity.

**Execution** – In this step, you can execute and start the marketing activity.

**Responses** – After the execution of the marketing you can evaluate the responses from participants.

3. Click on any of the channel icons to open the **Channel & Format Definition** window.





---

The channel and format definition process contains three phases: **Define Channel(s) > Define Format > Define Default Values** . The window opens on the **Define Channel(s)** phase.

- **Define Channels** – In this phase you can select the channels that are used to approach the customers for the marketing activities.
- **Define Format** – In this phase you can define the formats to be used for each of the channels you selected in the first phase. For example a template document for an email or fax, the fields that are used in the generation of a letter and similar formats for each of the required channels. The fields you want to include from different CRM info areas in the templates.
- **Define Default values** – You can define the default values for the marketing activities that are generated.

4. Provide the following information in the **Define Channel(s)** phase:

#### **Format Definition**

- **Format Name** – You can give a name to the format definition or retain the automatically generated name. This field is mandatory.
- **Lock** – Select this check box to lock the message format for the marketing activity.
- **Private** - Select this check box to keep the message generated for the marketing activity private.

#### **Preferred Channels**

- **Fixed** – You can select one fixed channel.

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**Note:** You cannot select variable channel, if you select a fixed channel.

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- **Variable (Priority)** – You can select multiple channels with variable priorities for the channels.
- **Generate** – This selection generates activities for all entities to represent the successful generation during the marketing activity execution. This is selected by default and cannot be changed.

**Save Channel(s)** – Click this button to save the Channel format details you configured on this page.

**Load Format** – Click this button to open the Channel Formats search window. Select the required format previously created, from the search result and load it. You can then edit the format as required.

**Proceed** – Click this button to go to the next step, **Define Format**.

---

**Note:** If you have not saved the channel definition, you are prompted to save the channel configuration details before proceeding.

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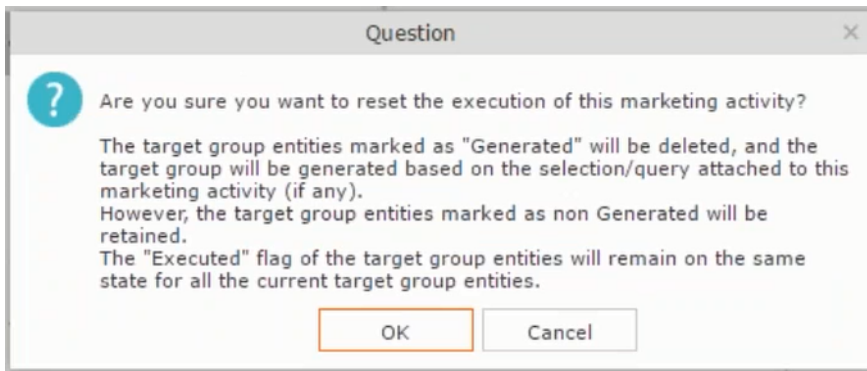
5. Click **Save Channel(s)**. Click **Proceed** to open the **Define Format** window.



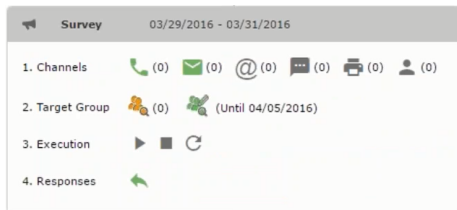
The Define Format window opens with tabs for each of the channel you selected. You can define the information required for the message formats required for the selected channels by clicking each of the tabs.

**Note:** The Phone and In-Person channels do not require and further configuration information. The remaining channels Letter, Email, SMS, and Fax require further configuration information you can define in this window. The fields that are in Orange are mandatory fields. If you do not fill the mandatory fields then you can still save the channel format but you cannot execute the channel definition.

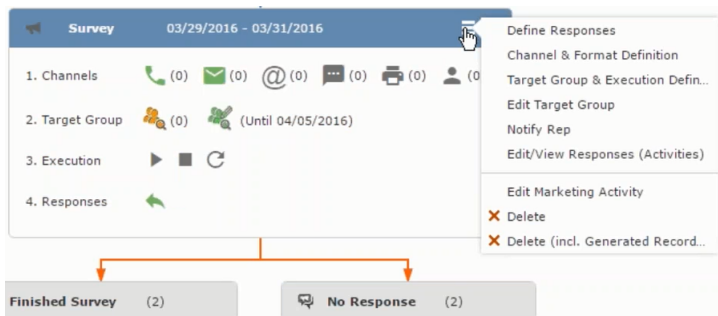
If you do not fill in a mandatory field and save the channel format, then if you go back to the Campaign designer you can see that the channels you selected is not green in color. See the screenshot below. The phone channel is in green color, but the Letter and Email channels are in grey.



6. Click on the Letter icon and it directly opens the Letter tab in the Define Format process step. Enter the format details of the channels including all the mandatory steps.



7. After providing the required information, click **Save Default Values**. Then click **Proceed** to move to the **Define Default Values** phase.



You provide a **Default Values Name** or use the automatically generated one. You can also search for and load a previously saved default values by using the **Load Default Values** button.

- After entering the default values, click **Save Default Values** and then click **Proceed** to return to the campaign designer window.

Notify about record

You can send this record to any other rep and/or external recipient. Please specify what you want to send:

Recipients:

Additional internal recipients:

Additional external recipients:

Subject:  
Survey (In Progress) | 03/29/2016

Body:

Insert Aurea CRM web link

Request a delivery receipt

Request a read receipt

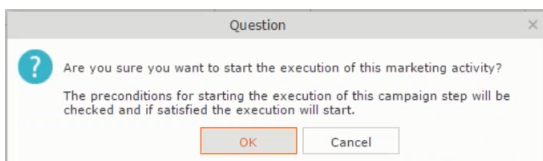
Send Cancel

Notice that the Phone and Letter channels icons are now in green.

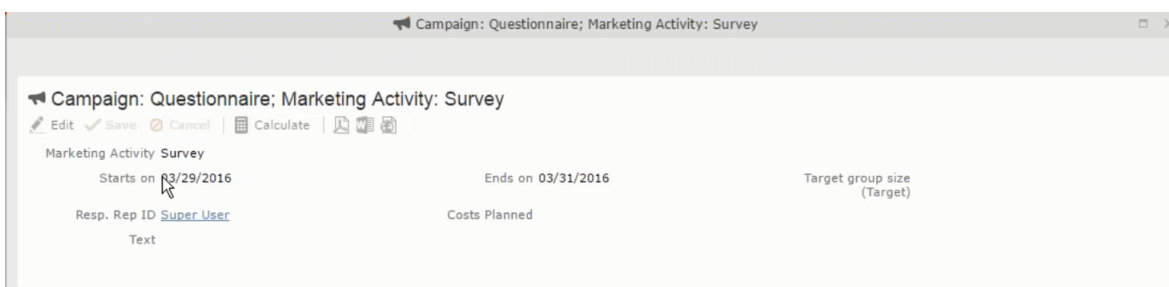
## Adding the Target Group and Execution Definition

To define the channels and formats for a marketing activity, perform the following steps:

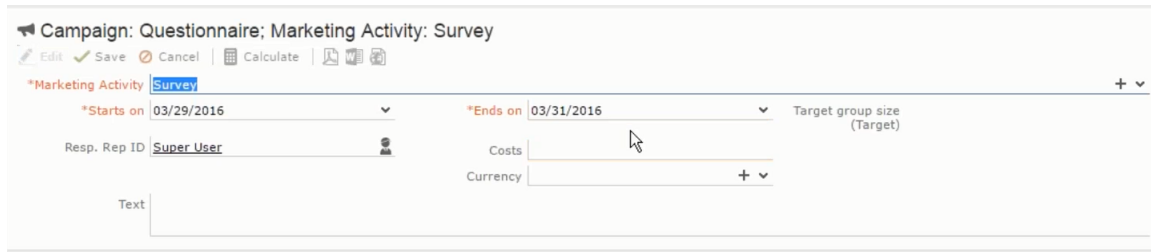
- Open the required campaign in the campaign designer.
- On the marketing activity container:
  - Click to expand the container.



- Click the target group icon to open the **Target Group**.



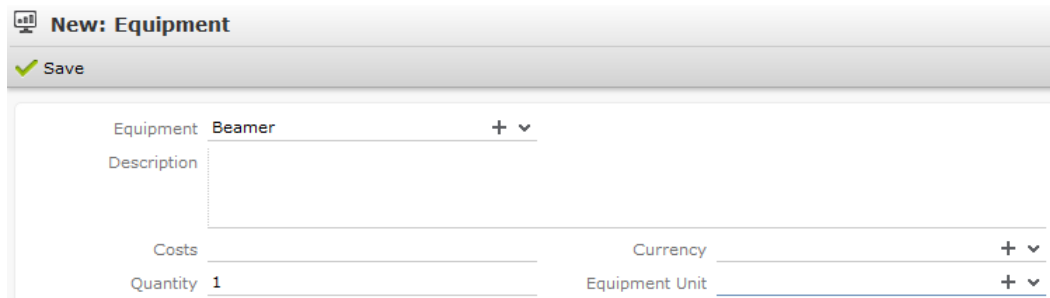
and **Execution Definition** window.



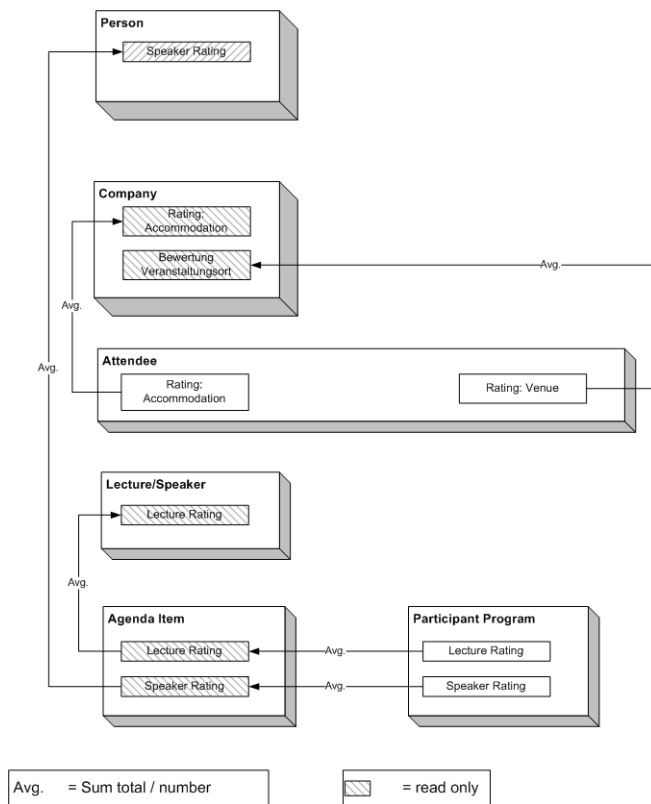
You can create the target group and define execution type using the following buttons:

- New Query – Use this to create a target group using the Standard Query process.
- New Quick Query – Use this to create a target group using the Quick Query process.
- Load Query – Use this to search for and load a query that is already created and saved.
- Select/Rework Target Group – Use this to select a different target group or modify the target group.
- Define Execution Type – This allows you to define the dates until which the queries are executed to update the target group. You can also define the execution types.

If you were to start creating the target group, but stop in between and reopen this window it also shows the current query you were working on. It now have options to edit or unlink the current query from the marketing activity. For example:



the above screenshot shows the current query that was being worked on to create the target group. The flag icon indicates that the current query is a standard type query.




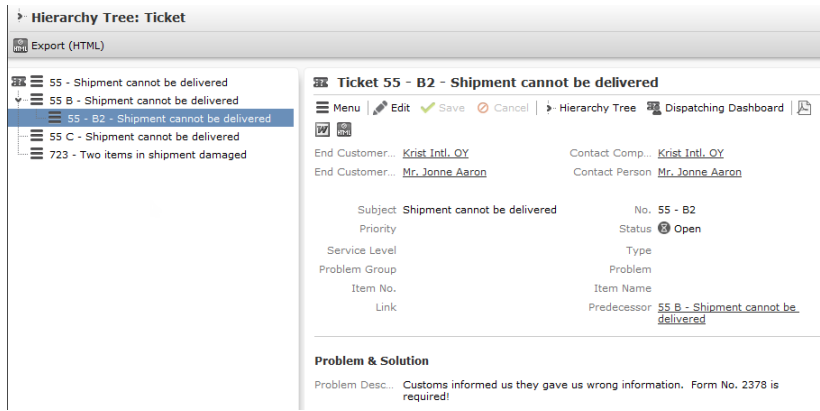
3. To create the target groups and define the execution type, perform one of the following:

- Using the New Query button:

1. Click New Query to open the standard New: Query window.
2. Enter the **Query Name** and the **UQL syntax** for the query and run the query to get a list of entities for the target group. These are added to the target group.

**Note:** Instead of using an UQL, you can specify the infoarea, the fields to search, and the conditions by using the buttons in the Formatted and Conditions sections.

3. Click **Save** to proceed to the next step, **Define Execution Type** window. In this window you can specify the following information:
  - Edit target group until – Specify the date until the target group can be updated based on the result of the query.
  - Execution Type – Select the execution type from the drop-down list.
4. Click  to open the **Create Target Group** step window.



If any of the items in the previous two steps are incomplete, you get warning messages. For example, if you had not defined the execution type and edit target group until date fields in the Define Execution Type window then Create Target Group window displays the incomplete steps as shown below. Also notice that the Create Target Group tab at the top has a red dot in it instead of a green dot.



5. Click **Create Target Group** to complete the creation of the target group process. A notification window along with some progress indicators are created as shown in the screenshot below.

The Target Group icon is now orange in color to indicate that the target group creation is in progress. Also the Target Group row now has date until which the target group list can be updated. Once the target group is processed then the channels and target group icons has the target group numbers in the brackets besides the respective icons.

Once the server creates the target group and updates the marketing activity is to be executed on the date specified. The icons is displayed in green. See the screenshot below.

**Search Tickets**

Search Results << < 1 - 5 of 24 > >>

No.	Priority	Subject	Status	Created on	End Customer Co...	Problem	Processed by ID
1...	Medium	Monitor fl...	Open	19.04.2013	Gabrieli	Monitor	Peter Parker
123	Medium	Problem	Open	05.03.2014	SunTea	Maintenance	Kazuko Kanzaki

24.04 - 26.04.2014 **New Activity**

Reps	Thu 24.04.2014	Fri 25.04.2014	Sat 26.04.2014
	04 08 12 16 20	04 08 12 16 20	04 08 12 16
Chris Aki			
Dominik Landertinger			
John Doe			
Kazuko Kanzaki			
Simon Eder			
Stephen Smith			

Today: Tue 13 May, 2014

Group reps by No grouping

Ticket-related rep

**Activity Defaults**


Type Telephone

Subject

Duration

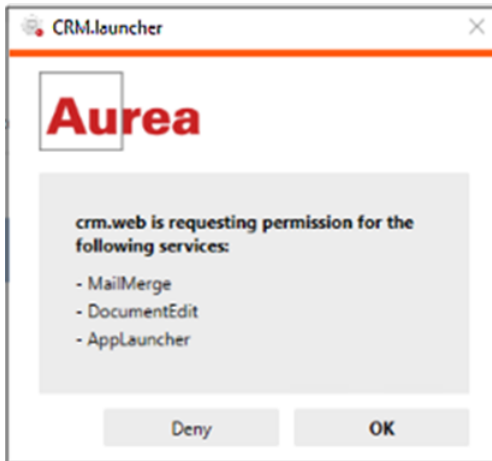
Unit

Purpose

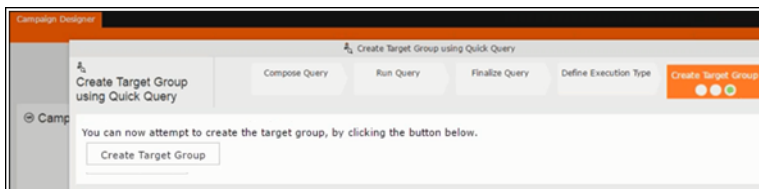
6. To edit the target group click . The Edit Target Group window opens. You can use the search queries to add more recipients to the target group.

**Note:** The target group icon turns Red () after the "Until" date.

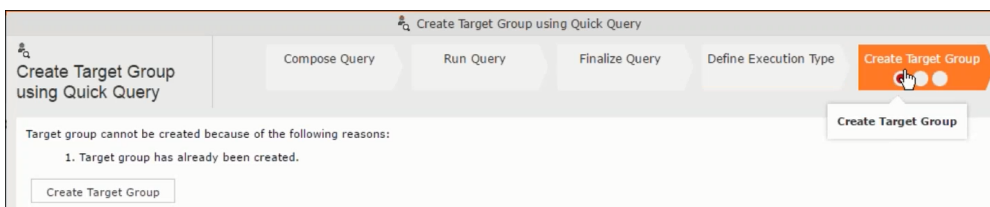
- To create the target groups and define the execution type using the New Quick Query option, perform one of the following:
  - Click the New Quick Query button from the Target Group & Execution Definition window. The Create Target Group using Quick Query window is opened.



2. Select the Root Info Area from the dropdown list.
3. Click **Run Query**. The query results are listed. Click Finalize Query.
4. Define if the query results are Private Query or Public Query. Enter a name in **Save As ...** field.
5. Click Save to finalize the results and attach the query results to this marketing activity. The Create Target Group window opens.



If any of the intermediate process steps are incomplete, you get a warning message, including if the target group is already created. A sample screenshot is provided below:

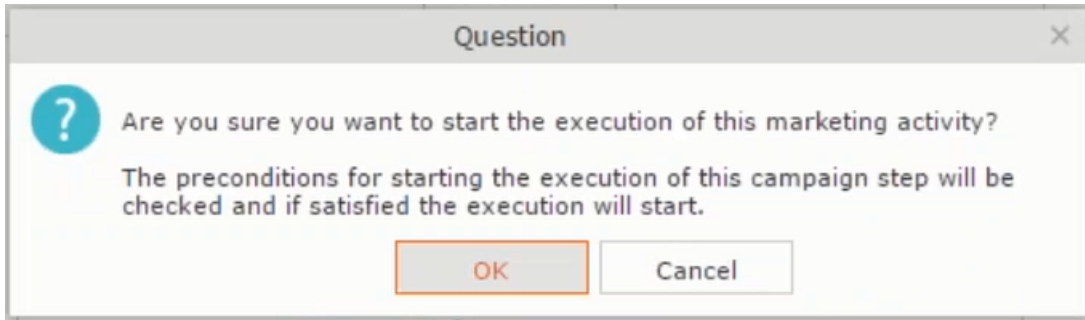


6. Click **Create Target Group** to complete creating the target group.

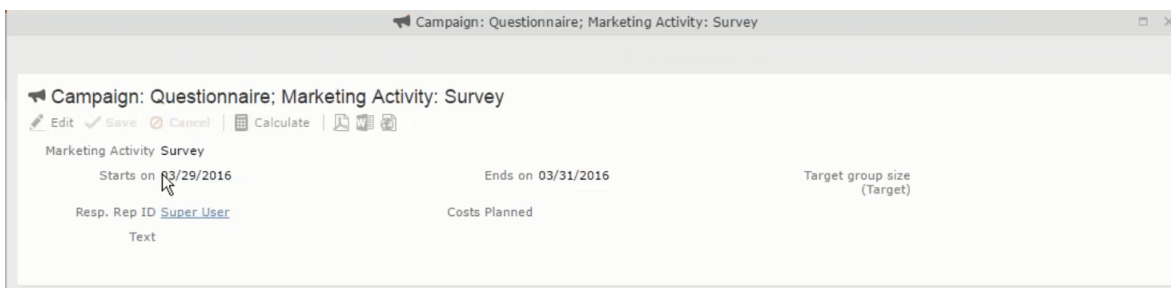


## Selecting or modifying the target group

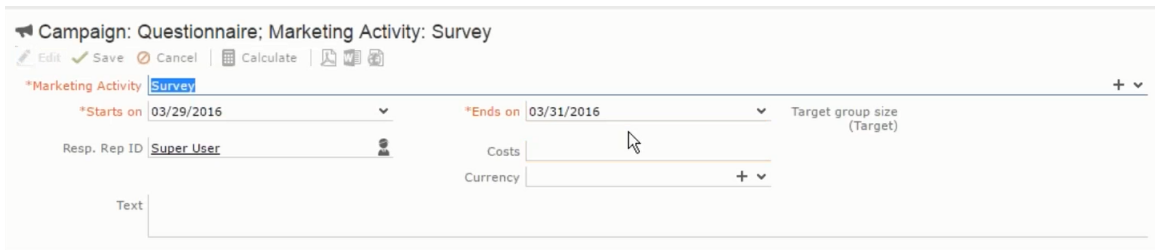
1. Open the required campaign in the campaign designer.
2. On the marketing activity container:
  - Click OK to expand the container.



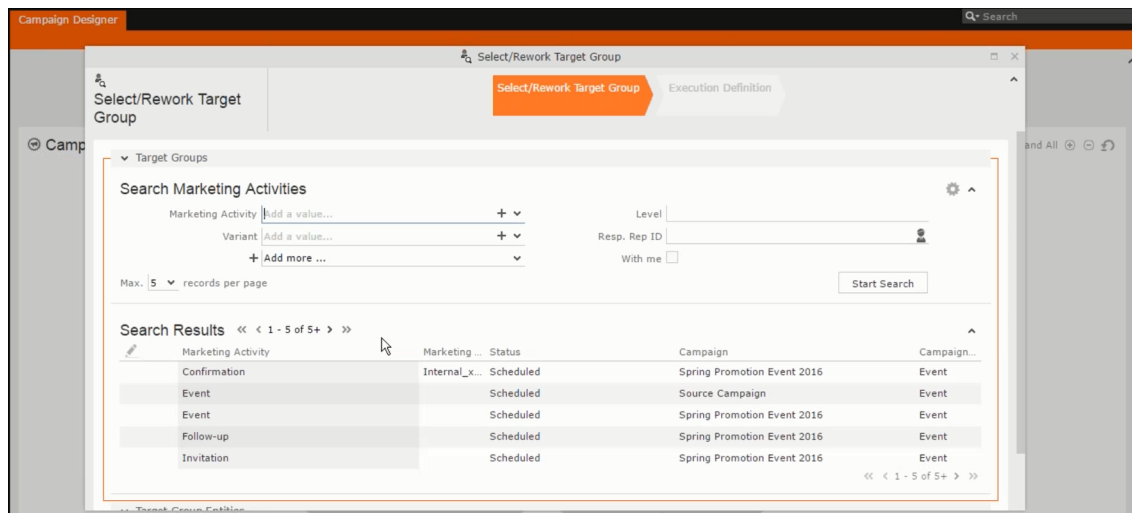
- Click the target group icon to open the **Target Group**



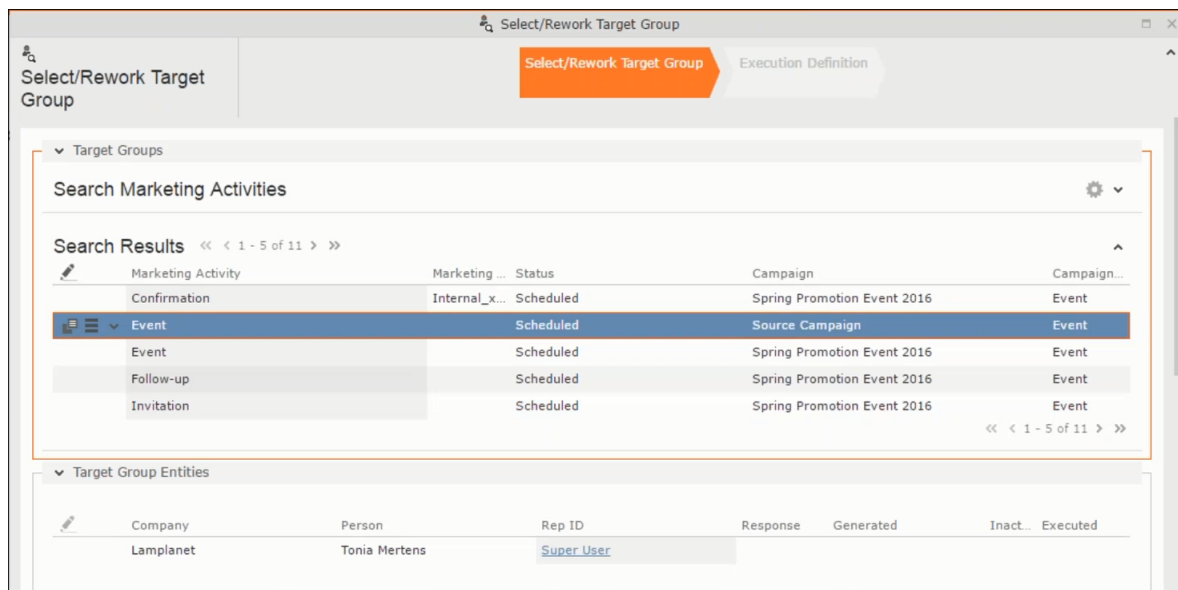
- and **Execution Definition** window.



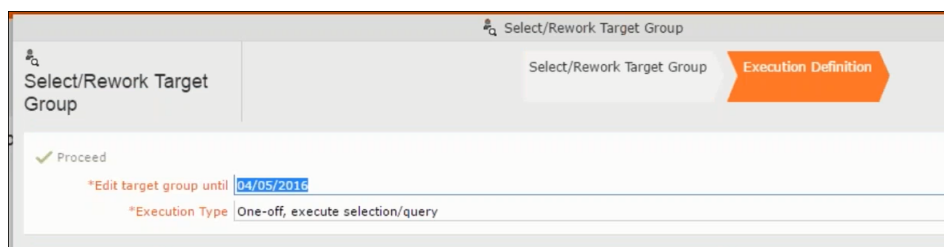
3. Click **Select/Rework Target Group**. The **Select/Rework Target Group** window displays.



4. You can search for marketing activities and select the desired marketing activity. The target group entities for the selected marketing activity are listed below.



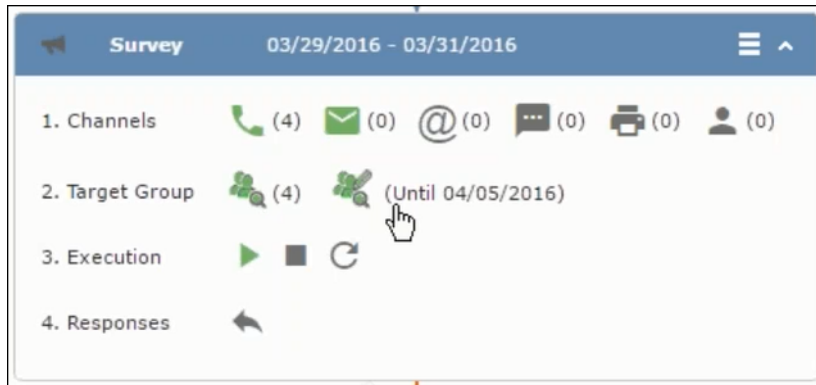
5. Double click on the marketing activity to add the target group from the selected marketing activity to the target group of the current marketing activity. The Execution Definition window displays.



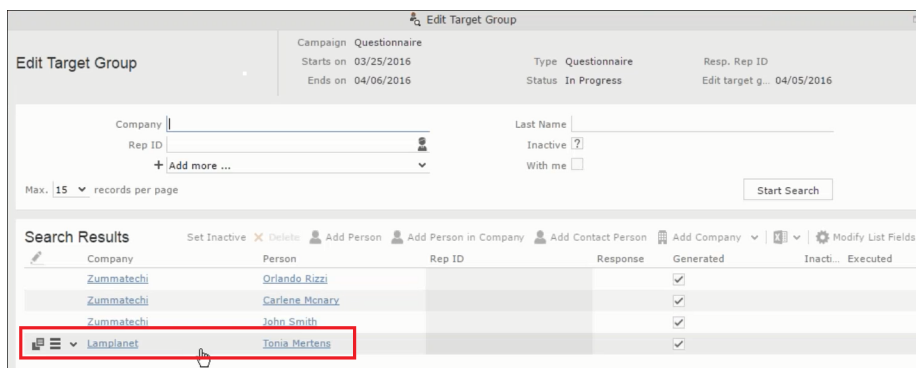
6. Specify the following information:

- **Edit target group until** – Specify the date until the target group can be updated.
- **Execution Type** – Select the execution type from the drop-down list.

7. Click Proceed. The campaign designer window opens.



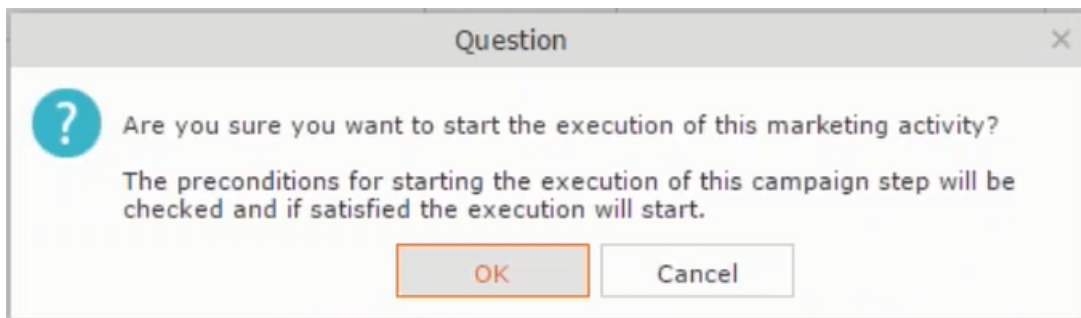
8. Click  to view the newly added participant to the target group.



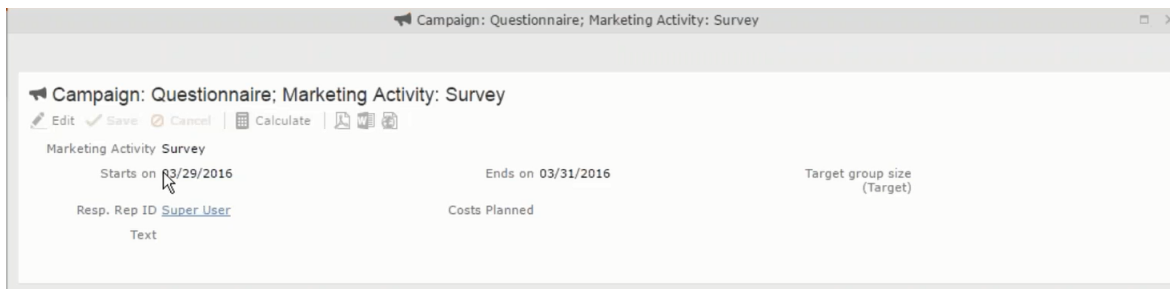
## Defining Execution Type

To define an execution type, perform the following:

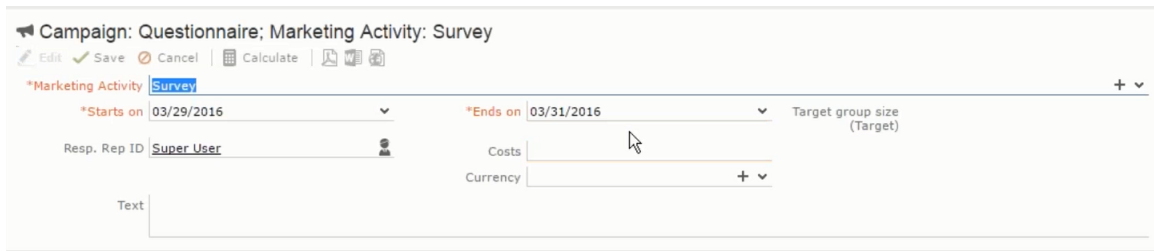
1. Open the required campaign in the campaign designer.
2. On the marketing activity container:
  - Click OK to expand the container.



- Click the target group icon to open the **Target Group**



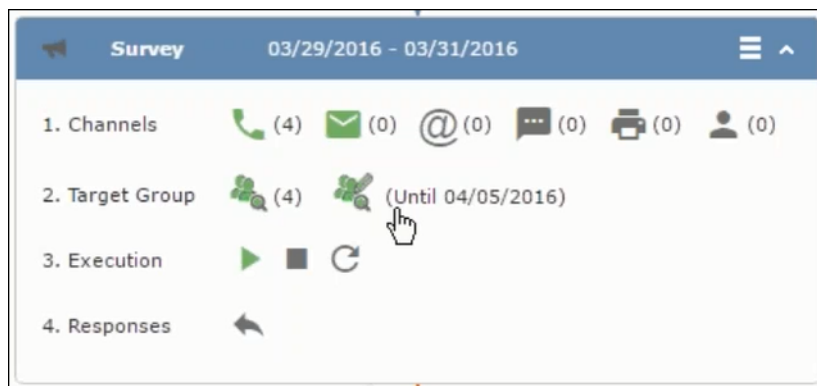
- and **Execution Definition** window.



3. Specify the following information:

- **Edit target group until** – Specify the date until the target group can be updated.
- **Execution Type** – Select the execution type from the drop-down list.

4. Click Proceed. The campaign designer window opens.



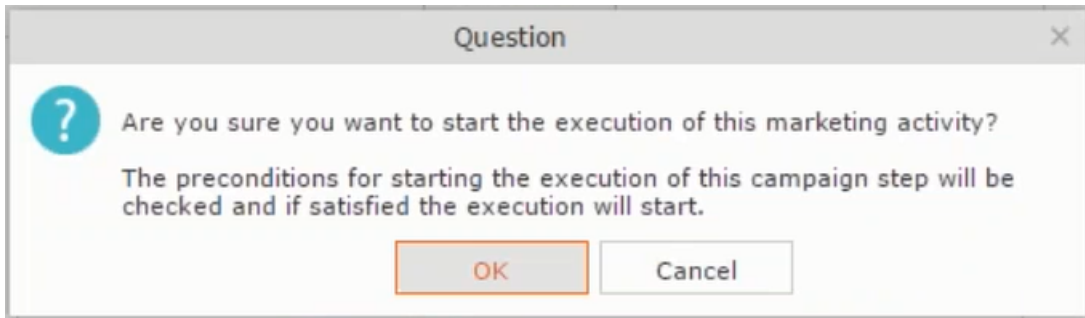
## Executing a Marketing Activity

To execute a marketing activity, the following conditions should be met:

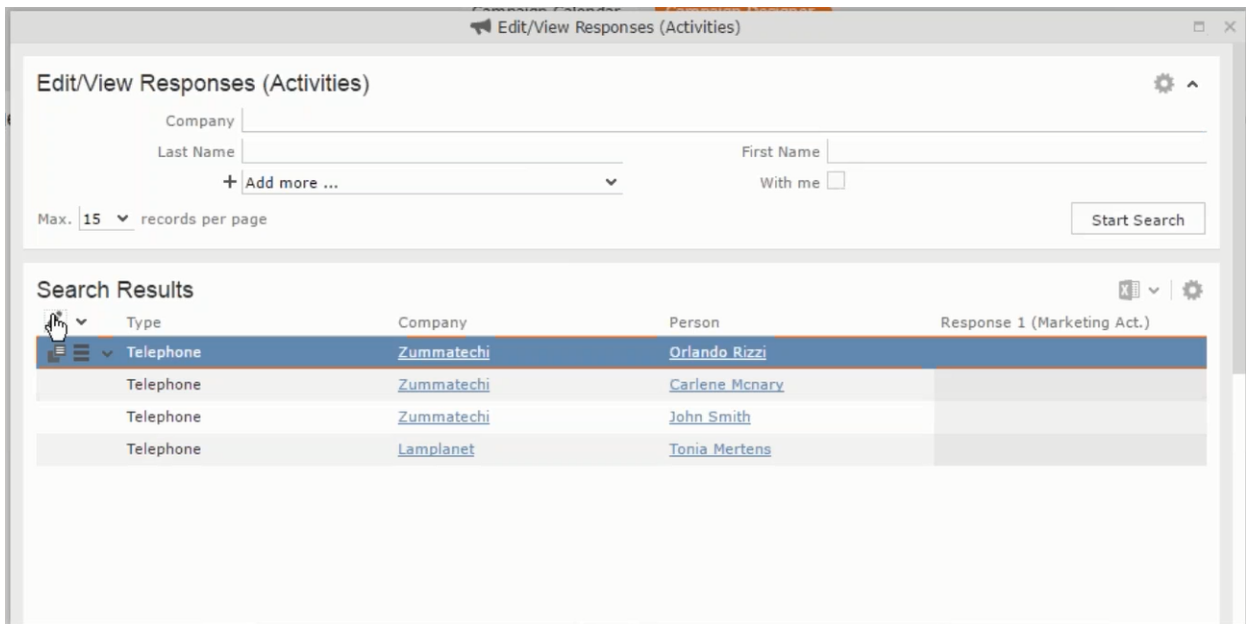
- All the selected channels and their formats should be defined. The selected channel icons would be green in color.
- The target groups should be defined. The Target group icons would be green in color.
- The current date should be within the scope of the start and end dates of the campaign.
- The “Edit target group until date” has to be defined. This date is visible besides the edit target group icon (🍃).

To execute a marketing activity, perform the following steps:

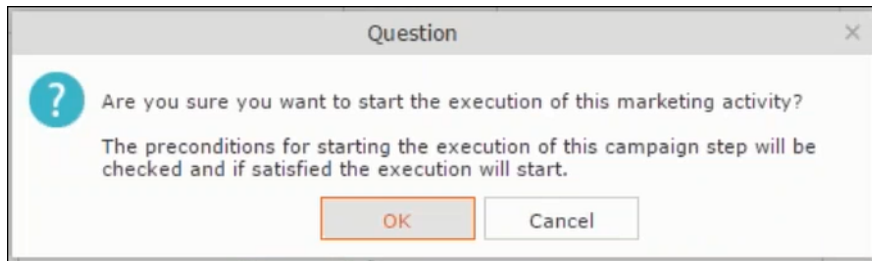
1. Open the required campaign in the campaign designer.
2. On the marketing activity container:
  - Click OK to expand the container.



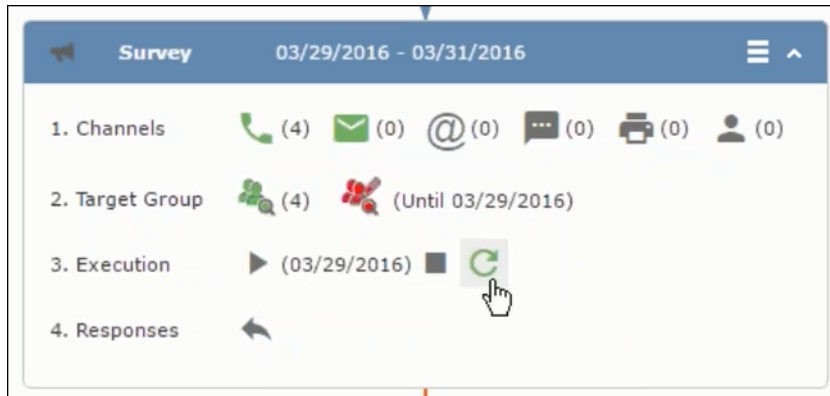
- The following screenshot shows the **Survey** marketing activity container.



3. Click the ► button on the **Execution** row. A query window pops up asking you to confirm the operation.



4. Click **OK**. A server notification informs you that the marketing activity has started and informs you when it is completed.




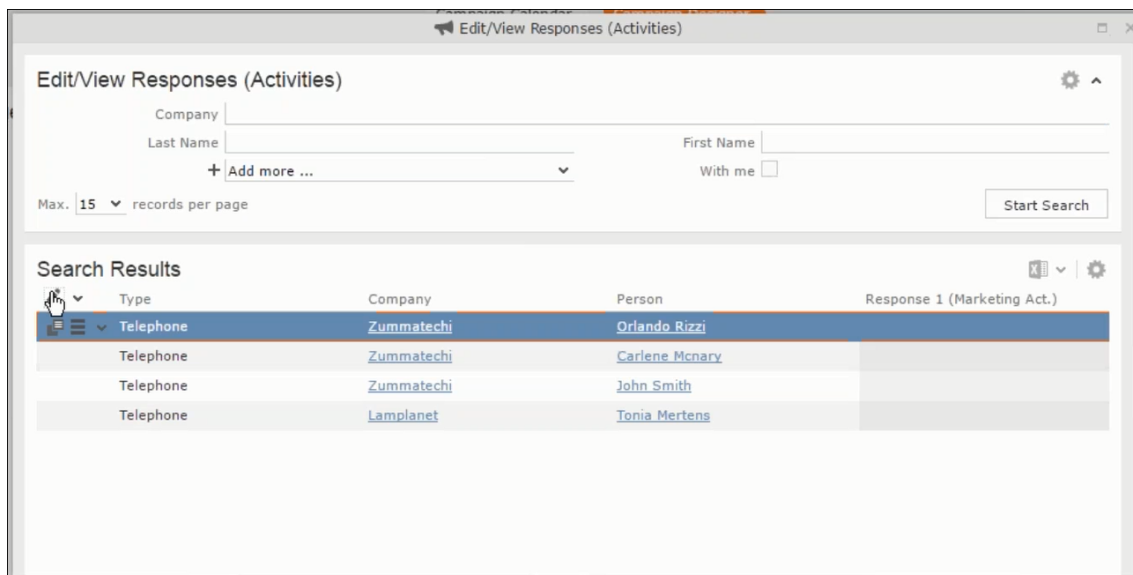
The Execute button is now greyed and the date on which the execution starts automatically is displayed in brackets besides it.

**Note:** The edit target group icon is now in red (✂). The abort button is greyed out once the execution starts. And reset button is now activated. The Responses button remains grey until the all the participants have responded.

## Editing/Viewing the Responses for a Marketing Activity

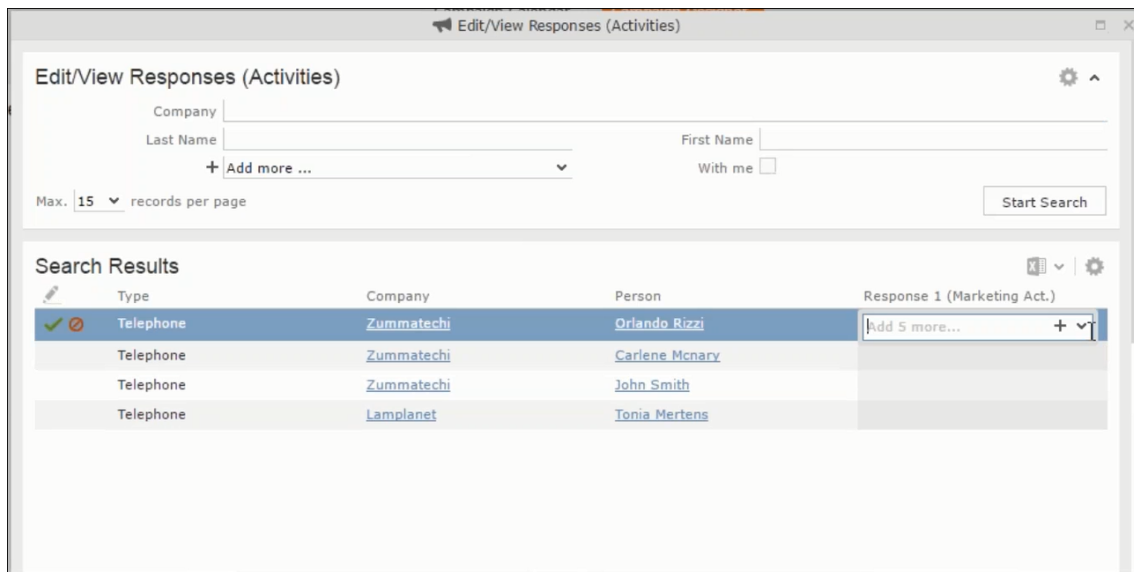
To edit or view the responses for a marketing activity, perform the following steps:

1. Click  icon in the responses row. The Edit/View Response (Activities) window opens.

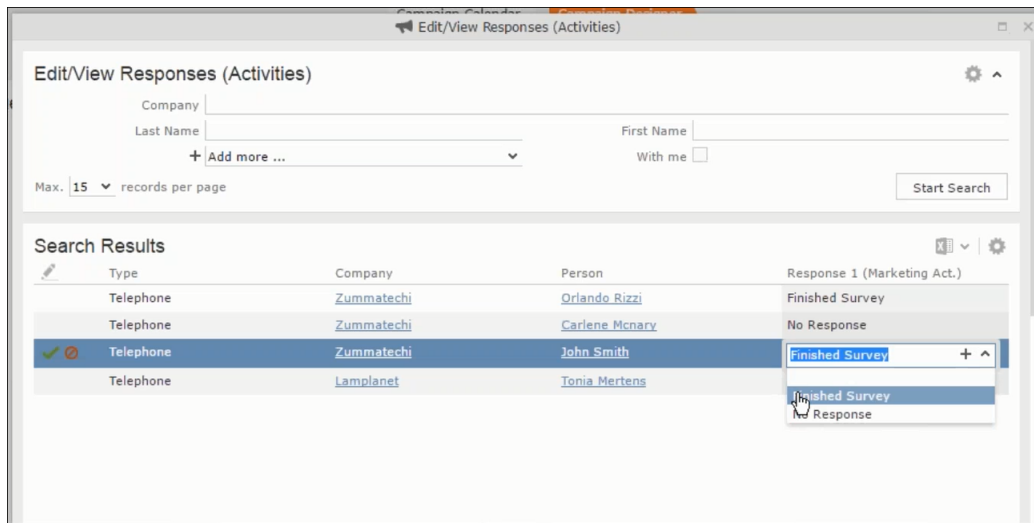


You can search for specific participants and view/edit their responses.

2. Select a row and click on Response 1 (Marketing Act.) column to activate and record the response.



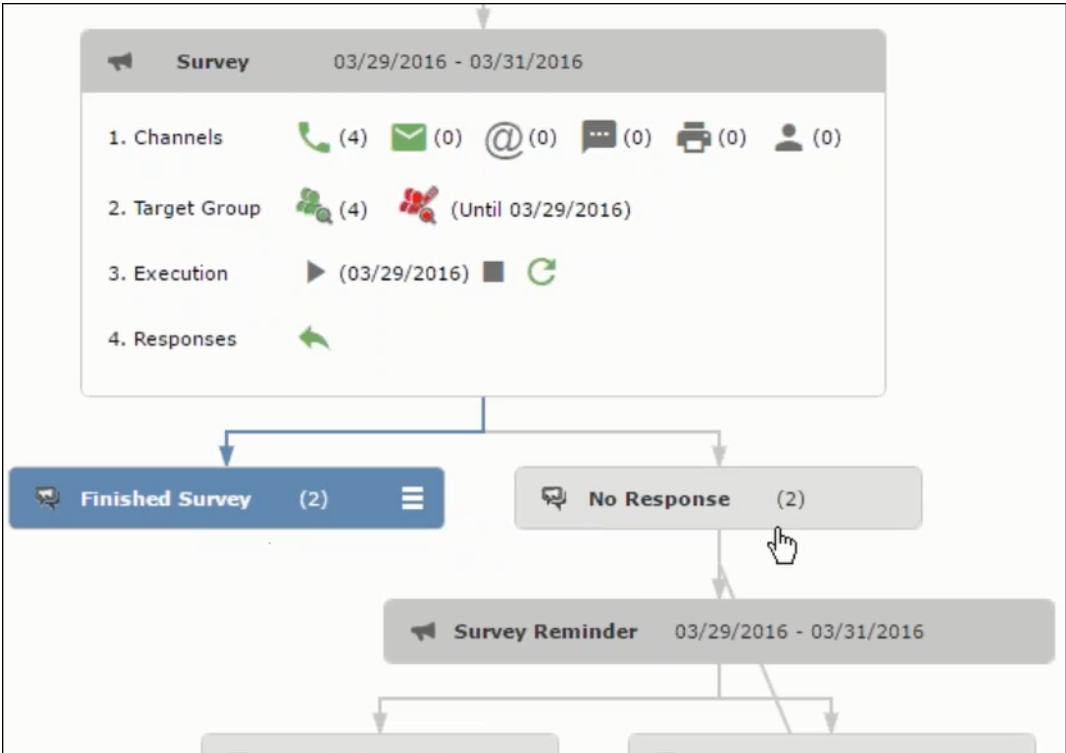
3. Click the drop-down list to select the response type. Click on the + button to add more response types to the response catalogue entries.



Edit the responses for all the participants.

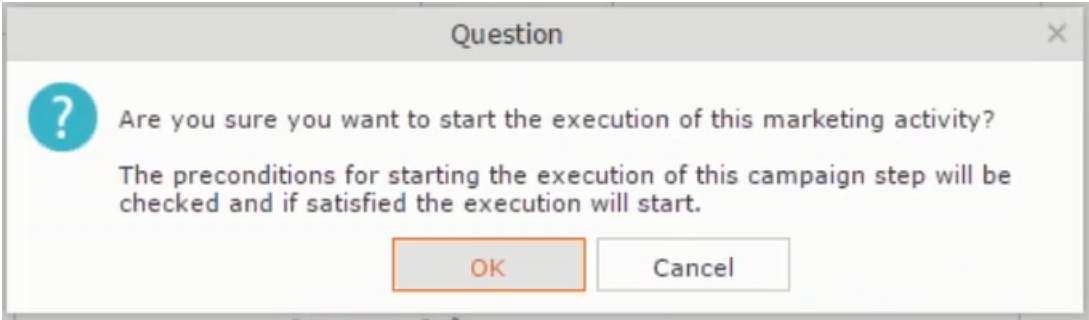
4. Close the window to come back to the campaign manager window. The response icon is be green in color. This shows that response for all the participants is recorded.

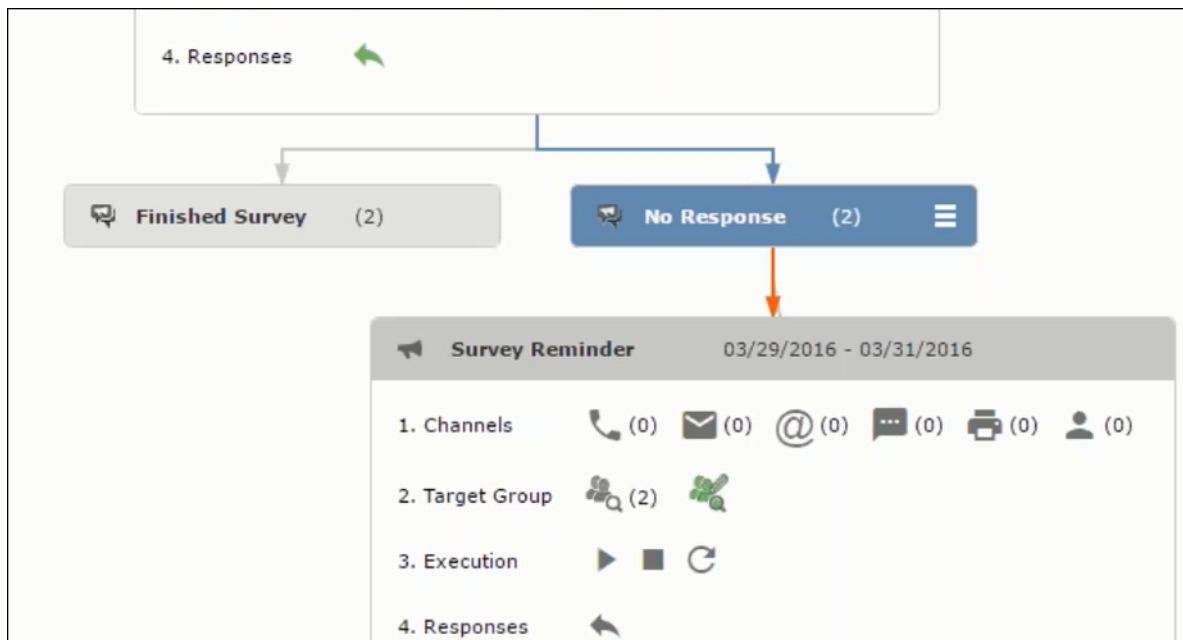




Notice the “(2)” in the response containers for the Survey marketing activity: **Finished Survey** and **No Response** show. This indicates that two participants completed the survey and two members did not respond.

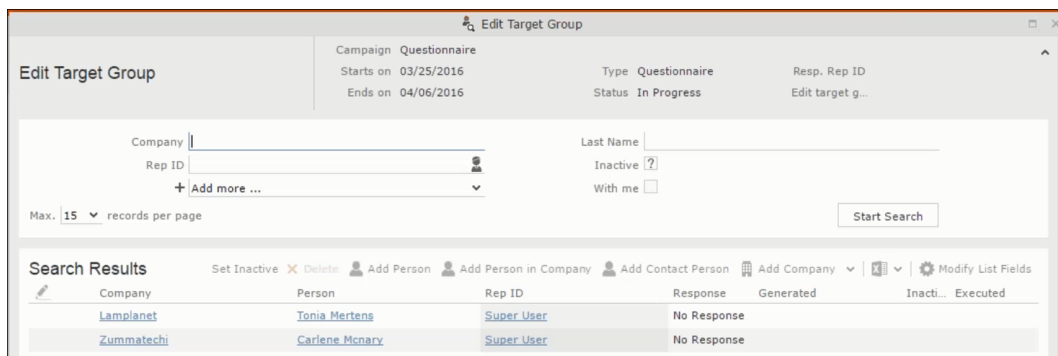
- 5. Click the button to expand the **Survey Reminder** follow-up marketing activity container for those participants who did not respond to the Survey.





You can see that two participants who did not respond are already added to the target group of the follow-up marketing activity.

- Click  to open the **Edit Target Group** window for the **Survey Reminder** follow-up marketing activity.



You can see that the two members with “No Response” in the **Response** column are listed.

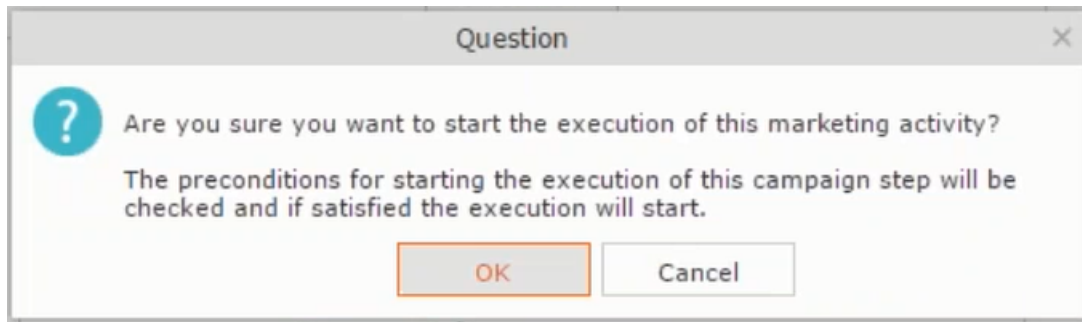
### Resetting the Marketing Activity Execution

Restarting a marketing activity is possible if the marketing activity execution is completed. It results in the following:

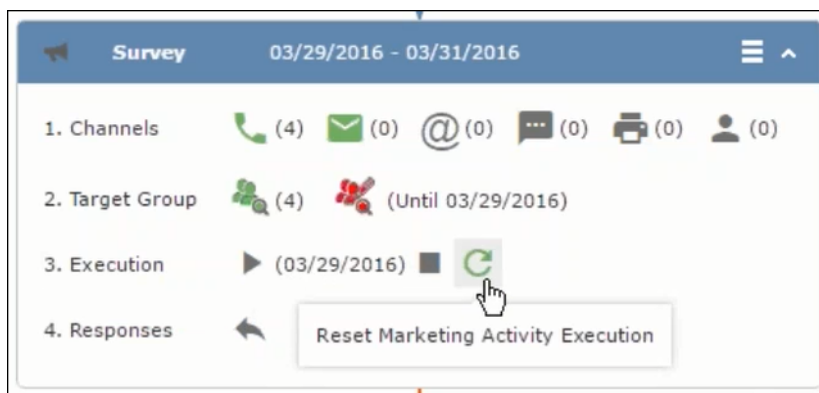
- All generated target group entities marked as “Generated” are deleted.
- The target group entities marked as “non Generated” are retained.
- The target group entities are regenerated based on the selection/query attached to this marketing activity.
- The target group entities that are marked as executed remains in the same state for the current target group.

To reset a marketing activity execution, perform the following:


1. Open the required campaign in the campaign designer.
2. On the marketing activity container, click to expand the container.

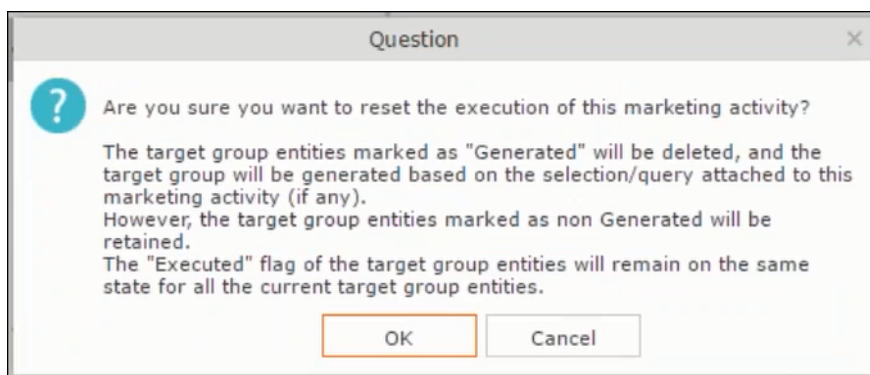


The following screenshot shows the **Survey** marketing activity container.

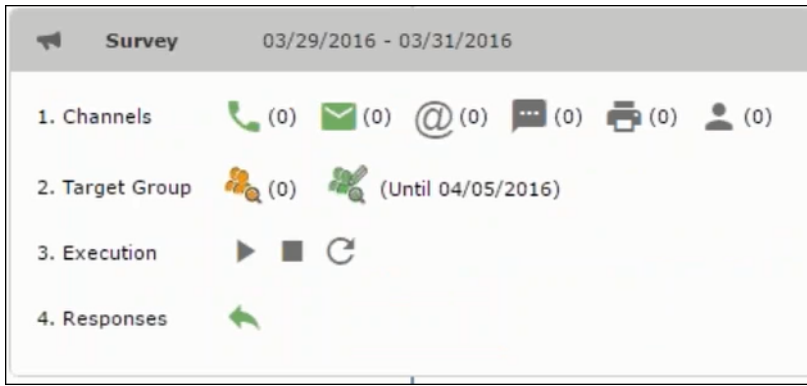


Notice that the execution button and the abort button are in grey. The reset button is in green and is active.

3. Click  to reset the marketing activity execution. A confirmation window displays.



4. Click **OK**. The target group is reset and the target group is regenerated. The edit target group until date is reset.

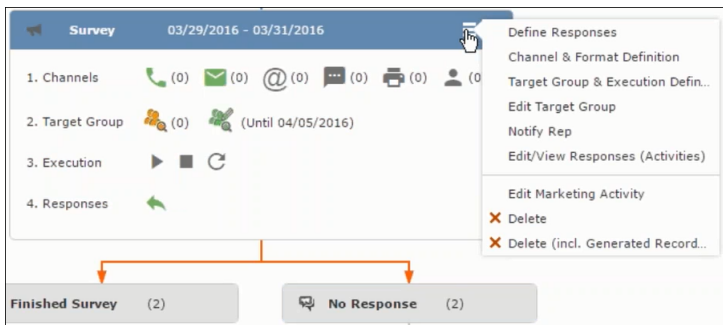


Notice that the Target group button is yellow and once the target group generation is completed, the execution button is active and ready for execution. The colors of the target group icon and execute button are in green.

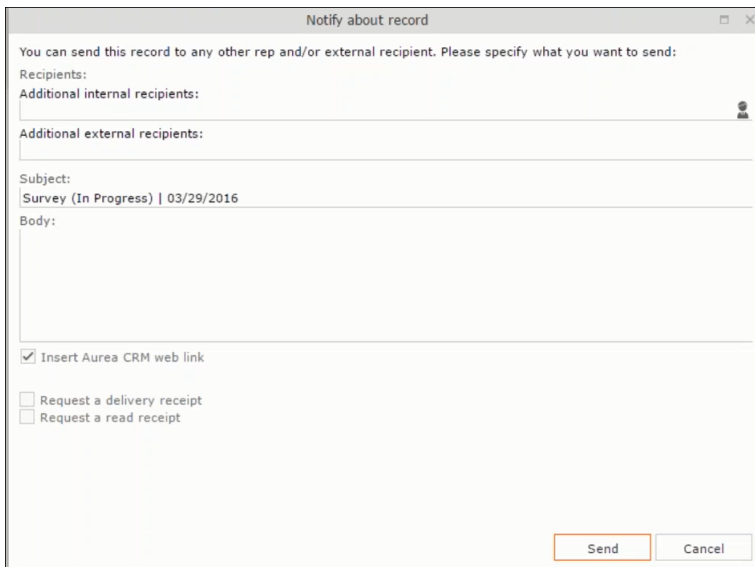
### Notifying Reps about a marketing activity

To notify reps, perform the following:

1. From the context menu of a marketing activity container, select **Notify Rep**.



2. The Notify about record opens.



Enter the following information:

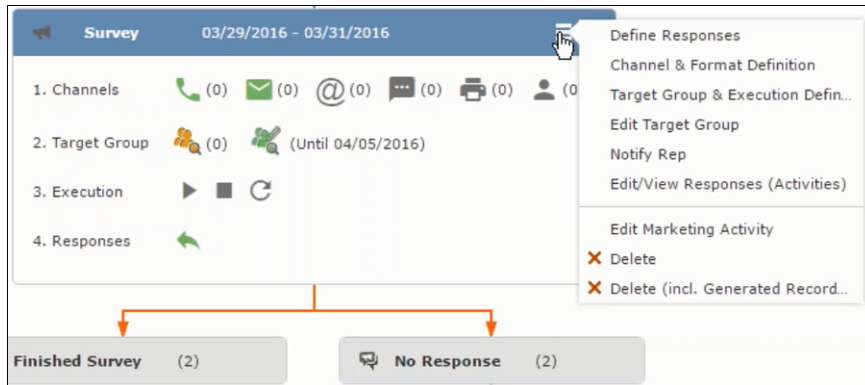
- **Recipients** – Add the internal and external recipients (reps) who receive the notification.
- **Subject** – Edit the subject of the notification email in this text field. You can also use the automatically generated subject.
- **Body** – Enter the notification content in the Body field.
- **Insert Aurea CRM web link** – Select this checkbox if you want to add the company URL in the notification.
- **Request a delivery receipt** – Select this checkbox if you want a receipt of delivery.
- **Request a read receipt** – Select this checkbox if you want to know if the notification was read by the recipient.

3. Click **Send** to send the notification to the selected reps.

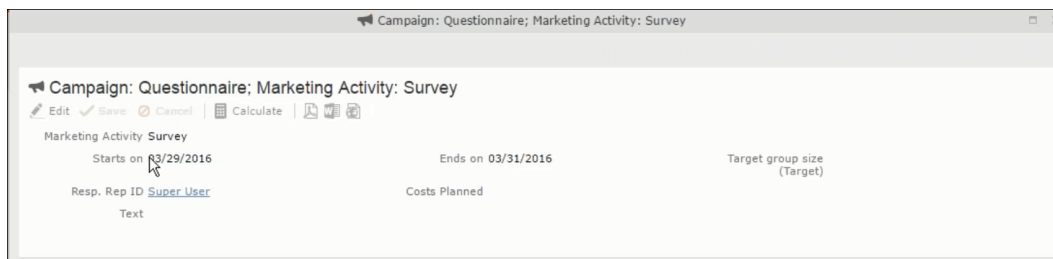
## Editing a Marketing Activity

To edit a marketing activity, perform the following:

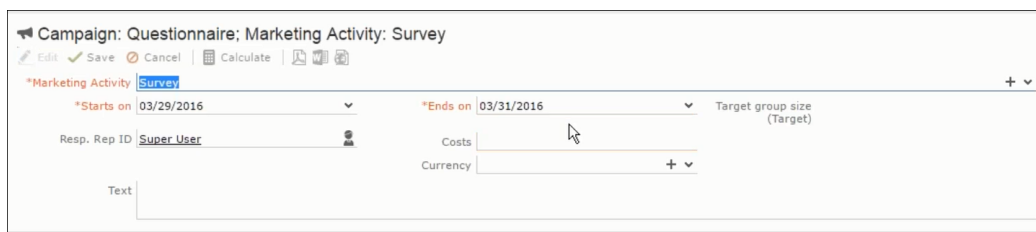
1. Open the required campaign in the campaign designer.
2. From the context menu of a marketing activity container, select **Edit Marketing Activity**.



3. The marketing activity window opens.



4. Click Edit to start editing the marketing activity.

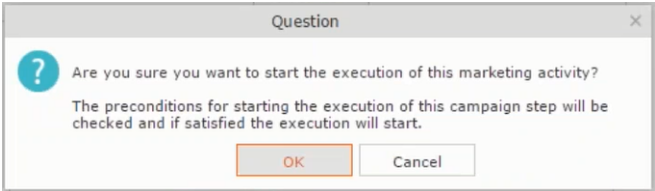


5. Make the required changes and click **Save**.

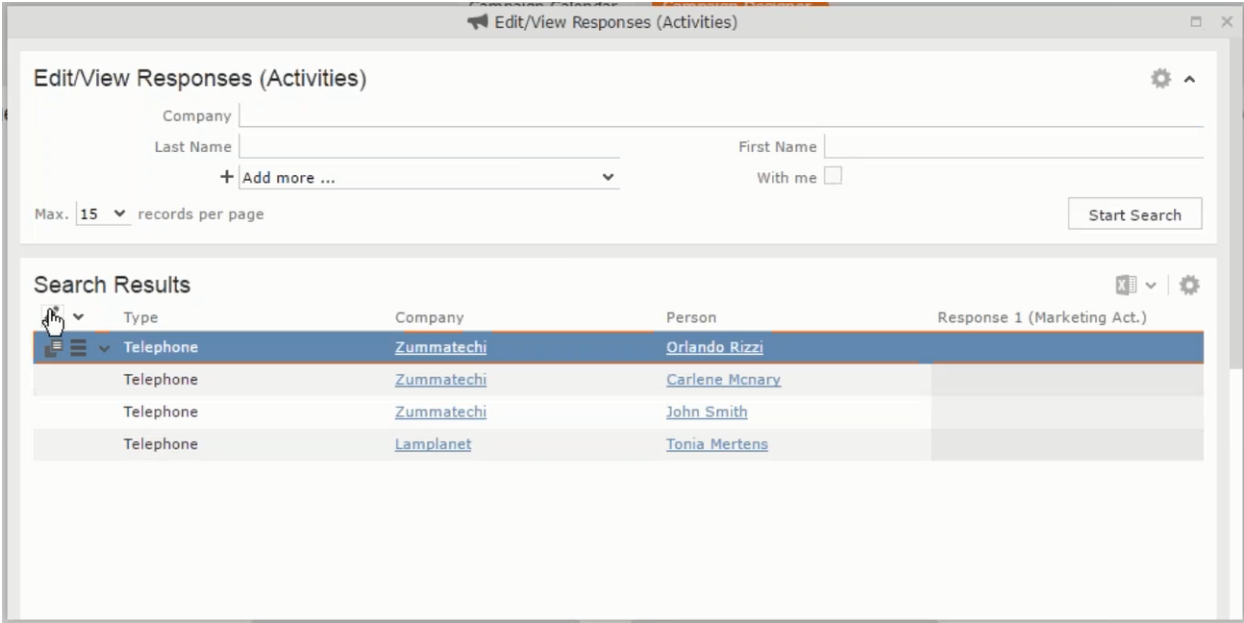
## Defining Channels and Formats used in a Marketing Activity

To define the channels and formats for a marketing activity, perform the following steps:

1. Open the required campaign in the campaign designer.
2. On the marketing activity container, click **OK** to expand the container.



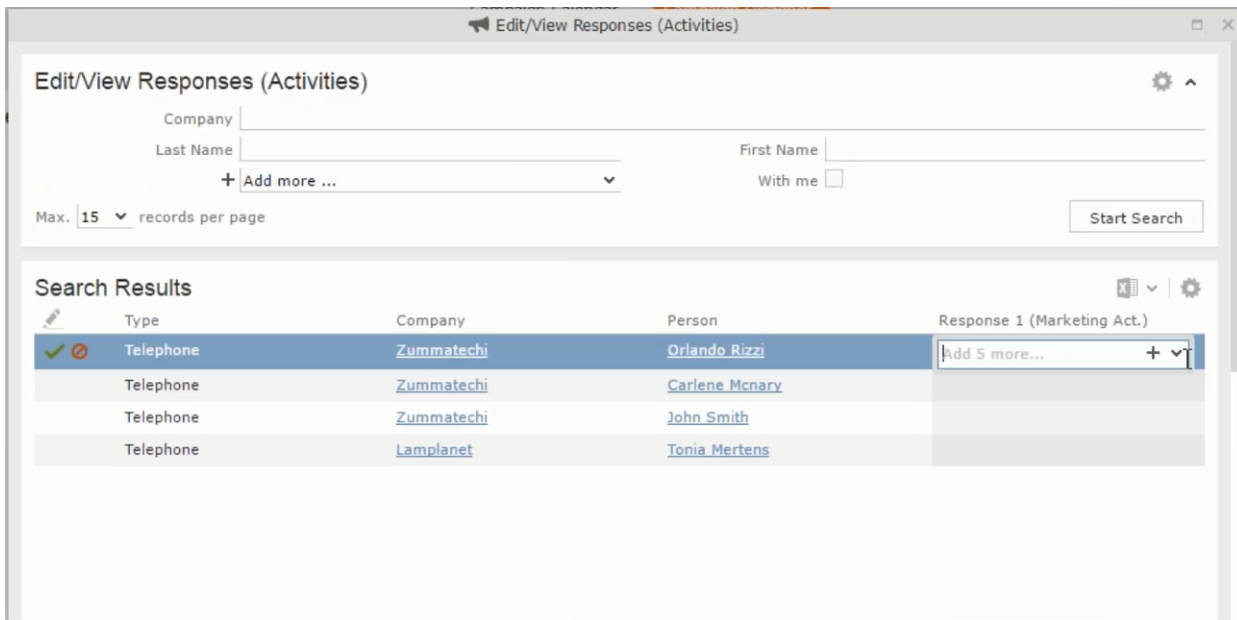
The following screenshot shows the **Survey** marketing activity container.



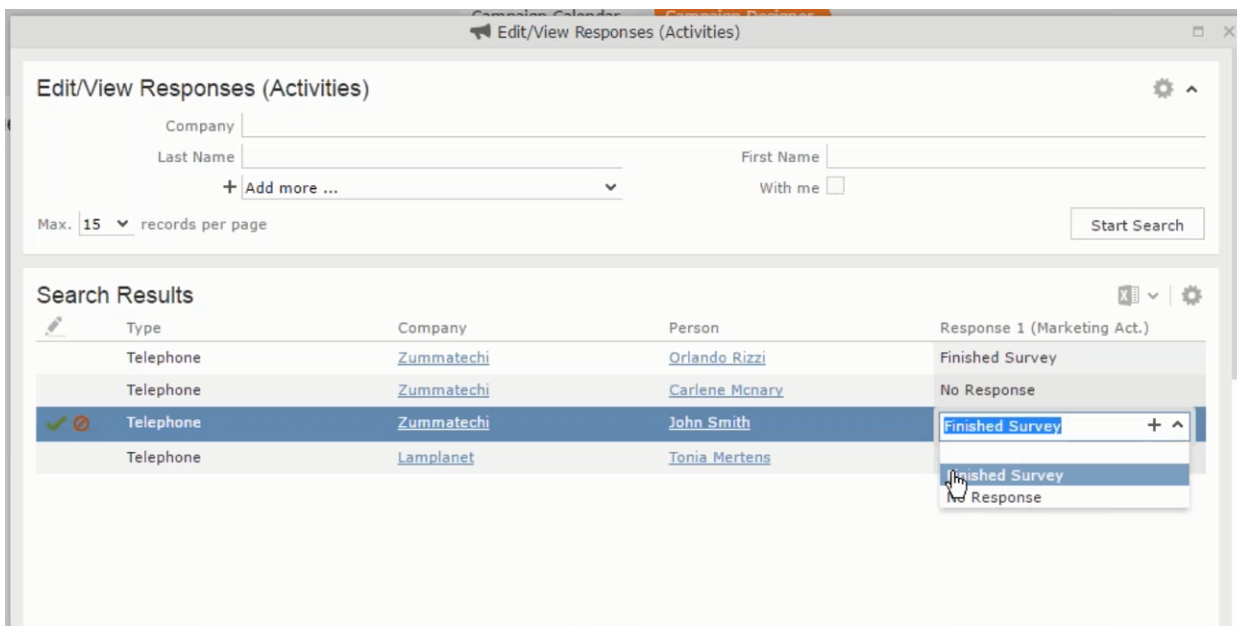
The following is a brief description of the components of a marketing activity:

**Channels** - The first row shows the available channels of communication for a marketing activity. The following channels are available:

- Phone

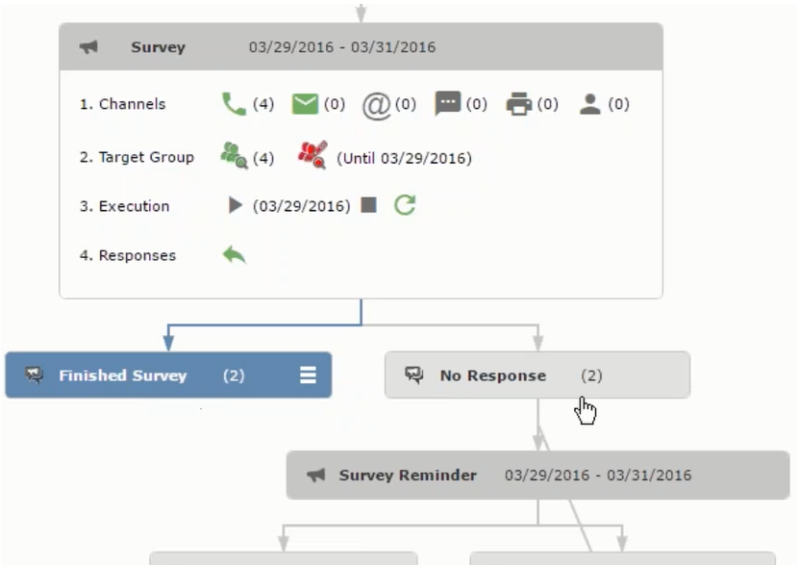


- Letter

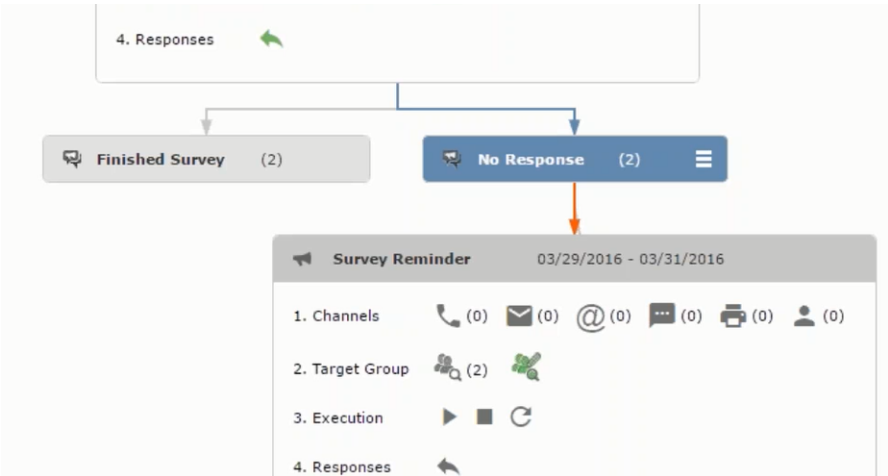


- Email

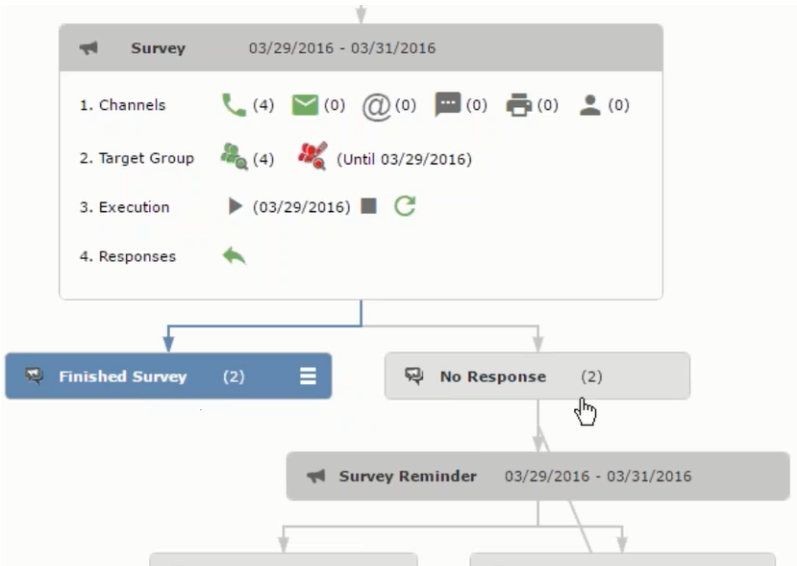




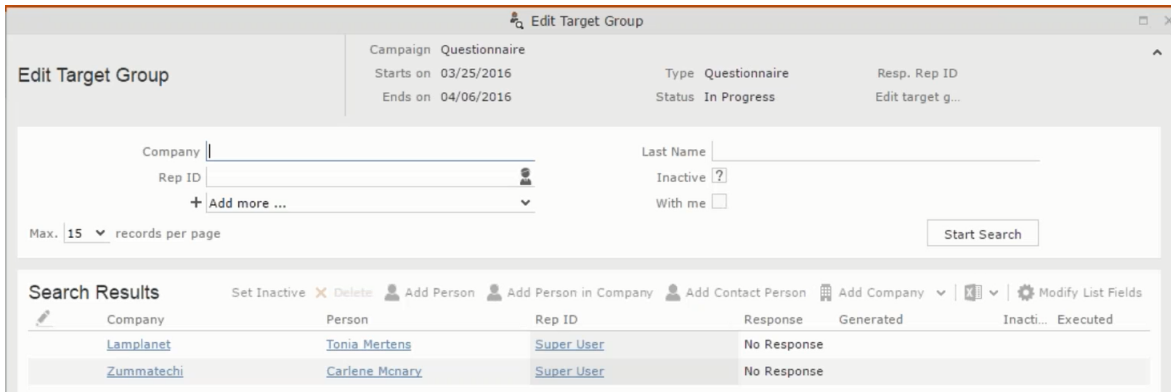
• SMS



• Fax



- In-person



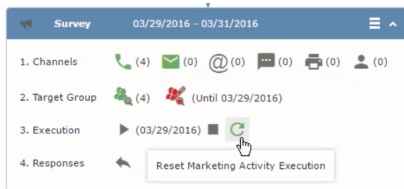
The numbers in brackets besides each channel represents the number of target group entities that is processed using this channel.

**Target Group** – In this step you can define the target groups (customers etc) who are to be the participants of this marketing activity.

**Execution** – In this step, you can execute and start the marketing activity.

**Responses** – After the execution of the marketing you can evaluate the responses from participants.

3. Click on any of the channel icons to open the **Channel & Format Definition** window.



The channel and format definition process contains three phases: **Define Channel(s) > Define Format > Define Default Values** . The window opens on the **Define Channel(s)** phase.

- **Define Channels** – In this phase you can select the channels that are used to approach the customers for the marketing activities.
- **Define Format** – In this phase you can define the formats to be used for each of the channels you selected in the first phase. For example a template document for an email or fax, the fields that are used in the generation of a letter and similar formats for each of the required channels. The fields you want to include from different CRM info areas in the templates.
- **Define Default values** – You can define the default values for the marketing activities that are generated.

4. Provide the following information in the **Define Channel(s)** phase:

---

## Format Definition

- **Format Name** – You can give a name to the format definition or retain the automatically generated name. This field is mandatory.
- **Lock** – Select this check box to lock the message format for the marketing activity.
- **Private** - Select this check box to keep the message generated for the marketing activity private.

## Preferred Channels

- **Fixed** – You can select one fixed channel.

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**Note:** You cannot select variable channel, if you select a fixed channel.

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- **Variable (Priority)** – You can select multiple channels with variable priorities for the channels.
- **Generate** – This selection generates activities for all entities to represent the successful generation during the marketing activity execution. This is selected by default and cannot be changed.

**Save Channel(s)** – Click this button to save the Channel format details you configured on this page.

**Load Format** – Click this button to open the Channel Formats search window. Select the required format previously created, from the search result and load it. You can then edit the format as required.

**Proceed** – Click this button to go to the next step, **Define Format**.

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**Note:** If you have not saved the channel definition, you are prompted to save the channel configuration details before proceeding.

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5. Click **Save Channel(s)**. Click **Proceed** to open the **Define Format** window.



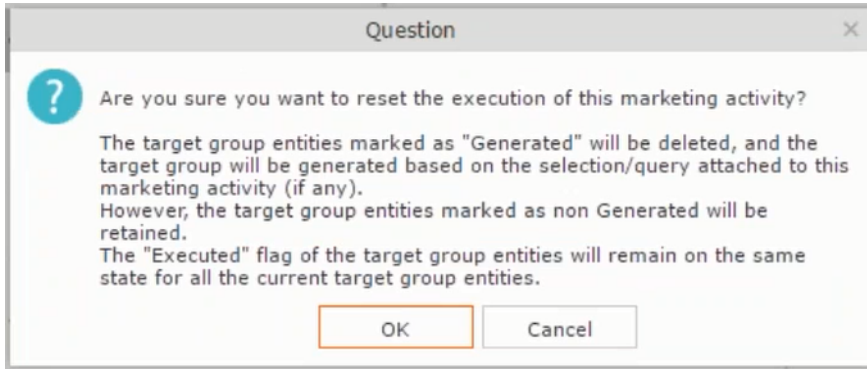
The Define Format window opens with tabs for each of the channel you selected. You can define the information required for the message formats required for the selected channels by clicking each of the tabs.

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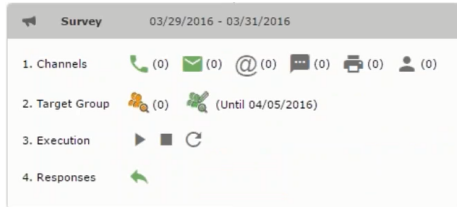
**Note:** The Phone and In-Person channels do not require and further configuration information. The remaining channels Letter, Email, SMS, and Fax require further configuration information you can define in this window.

The fields that are in Orange are mandatory fields. If you do not fill the mandatory fields then you can still save the channel format but you cannot execute the channel definition.

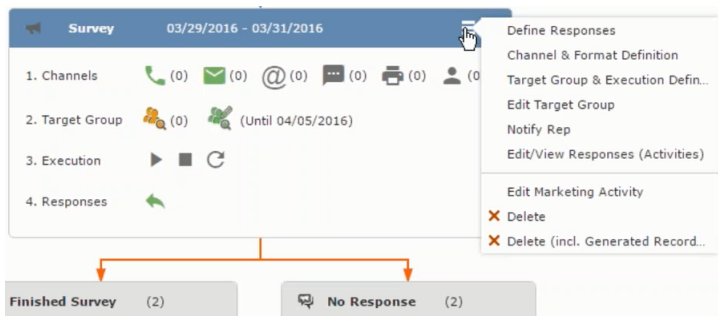
If you do not fill in a mandatory field and save the channel format, then if you go back to the Campaign designer you can see that the channels you selected is not green in color. See the screenshot below. The phone channel is in green color, but the Letter and Email channels are in grey.



6. Click on the Letter icon and it directly opens the Letter tab in the Define Format process step. Enter the format details of the channels including all the mandatory steps.



7. After providing the required information, click **Save Default Values**. Then click **Proceed** to move to the **Define Default Values** phase.



You provide a **Default Values Name** or use the automatically generated one. You can also search for and load a previously saved default values by using the **Load Default Values** button.

- After entering the default values, click **Save Default Values** and then click **Proceed**. You are returned to the campaign designer window.

Notify about record

You can send this record to any other rep and/or external recipient. Please specify what you want to send:

Recipients:

Additional internal recipients:

Additional external recipients:

Subject:  
Survey (In Progress) | 03/29/2016

Body:

Insert Aurea CRM web link

Request a delivery receipt

Request a read receipt

Send Cancel

Notice that the Phone and Letter channels icons are now in green.

## Adding the Target Group and Execution Definition

To define the channels and formats for a marketing activity, perform the following steps:

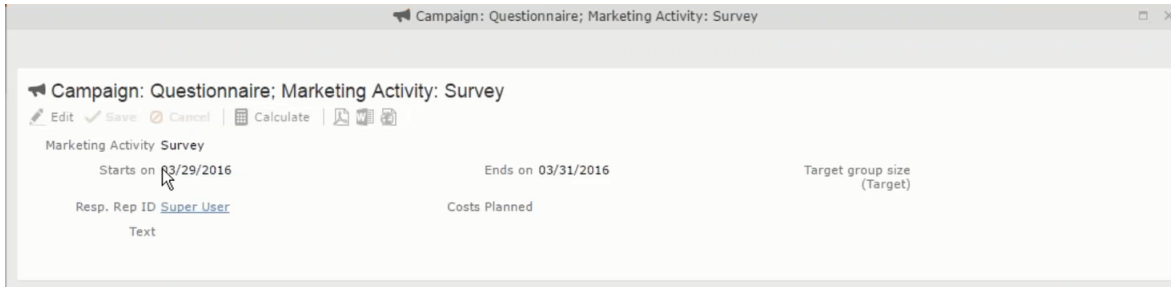
- Open the required campaign in the campaign designer.
- On the marketing activity container:
  - Click to expand the container.

Question

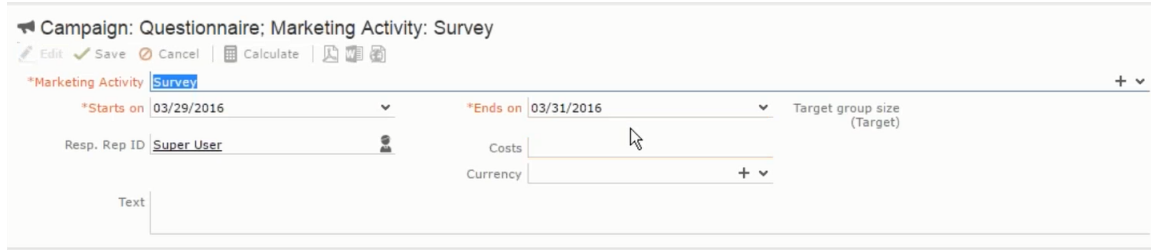
Are you sure you want to start the execution of this marketing activity?  
The preconditions for starting the execution of this campaign step will be checked and if satisfied the execution will start.

OK Cancel

- Click the target group icon to open the **Target Group**.



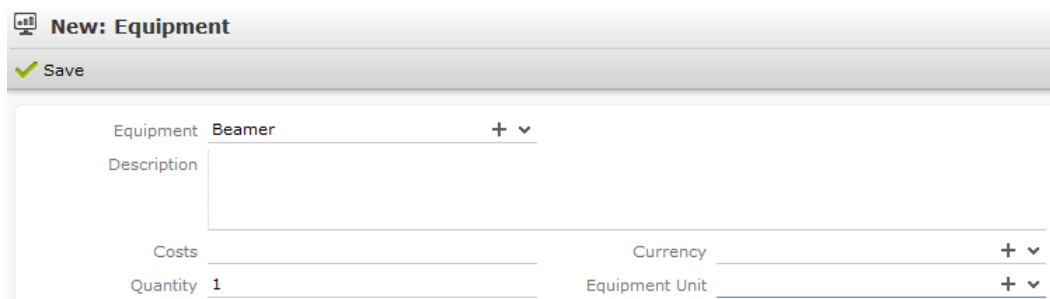
and **Execution Definition** window.



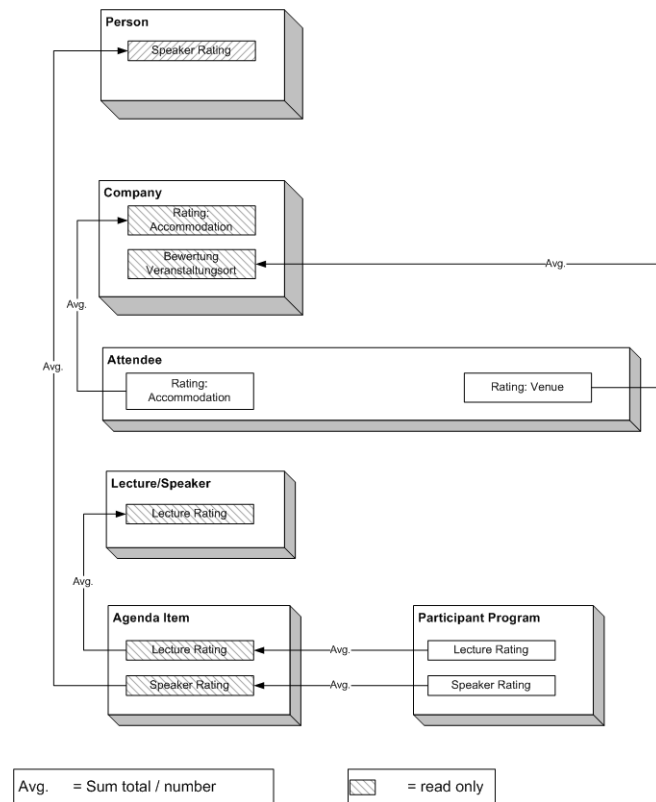
You can create the target group and define execution type using the following buttons:

- **New Query** – Use this to create a target group using the Standard Query process.
- **New Quick Query** – Use this to create a target group using the Quick Query process.
- **Load Query** – Use this to search for and load a query that is already created and saved.
- **Select/Rework Target Group** – Use this to select a different target group or modify the target group.
- **Define Execution Type** – This allows you to define the dates until which the queries are executed to update the target group. You can also define the execution types.

If you were to start creating the target group, but stop in between and reopen this window it also shows the current query you were working on. It now have options to edit or unlink the current query from the marketing activity. For example:



the above screenshot shows the current query that was being worked on to create the target group. The flag icon indicates that the current query is a standard type query.



3. To create the target groups and define the execution type, perform one of the following:

- Using the New Query button:

- Click New Query to open the standard New: Query window.
- Enter the **Query Name** and the **UQL syntax** for the query and run the query to get a list of entities for the target group. These are added to the target group.

---

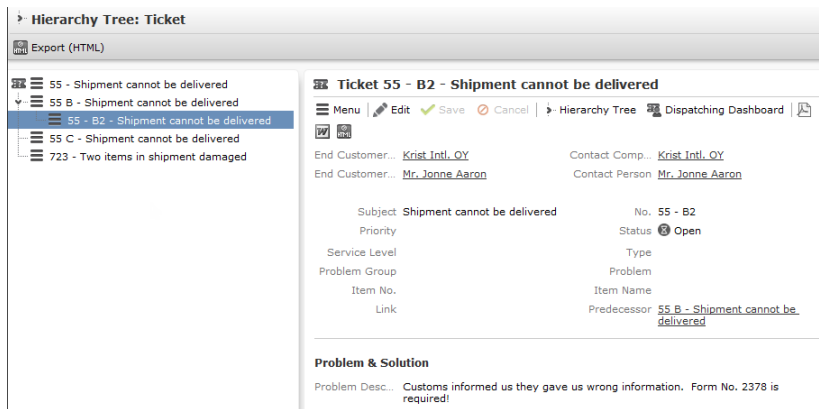
**Note:** Instead of using an UQL, you can specify the infoarea, the fields to search, and the conditions by using the buttons in the Formatted and Conditions sections.

---

3. Click **Save** to proceed to the next step, **Define Execution Type** window. In this window you can specify the following information:


- Edit target group until – Specify the date until the target group can be updated based on the result of the query.
- Execution Type – Select the execution type from the drop-down list.

4. Click  to open the **Create Target Group** step window.



If any of the items in the previous two steps are incomplete, you get warning messages. For example, if you had not defined the execution type and edit target group until date fields in the Define Execution Type window then Create Target Group window displays the incomplete steps as shown below. Also notice that the Create Target Group tab at the top has a red dot in it instead of a green dot.



5. Click **Create Target Group** to complete the creation of the target group process. A notification window along with some progress indicators are created as shown in the screenshot below. 

The Target Group icon is now orange in color to indicate that the target group creation is in progress. Also the Target Group row now has date until which the target group list can be updated. Once the target group is processed then the channels and target group icons has the target group numbers in the brackets besides the respective icons.

Once the server creates the target group and updates the marketing activity is to be executed on the date specified. The icons are displayed in green. See the screenshot below.



**Search Tickets**

Search Results << < 1 - 5 of 24 >>

No.	Priority	Subject	Status	Created on	End Customer Co...	Problem	Processed by ID
1...	Medium	Monitor fl...	Open	19.04.2013	Gabrieli	Monitor	Peter Parker
123	Medium	Problem	Open	05.03.2014	SunTea	Maintenance	Kazuko Kanzaki

24.04 - 26.04.2014 New Activity

Reps	Thu 24.04.2014	Fri 25.04.2014	Sat 26.04.2014
	04 08 12 16 20	04 08 12 16 20	04 08 12 16
Chris Aki			
Dominik Landertinger			
John Doe			
Kazuko Kanzaki			
Simon Eder			
Stephen Smith			

Today: Tue 13 May, 2014

Group reps by No grouping

Ticket-related rep

Activity Defaults


Type Telephone

Subject

Duration

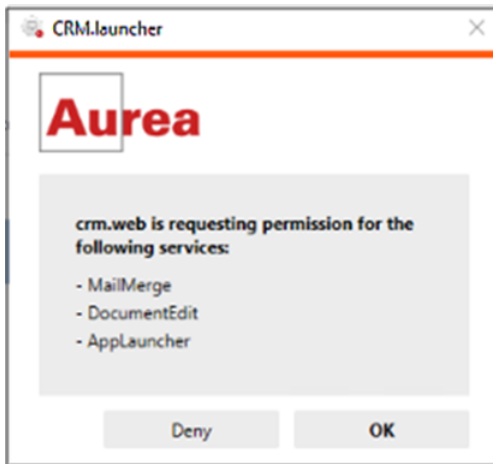
Unit

Purpose

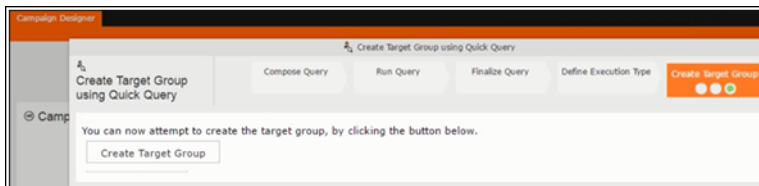
6. To edit the target group click . The Edit Target Group window opens. You can use the search queries to add more recipients to the target group.

**Note:** The target group icon turns Red () after the “Until” date.

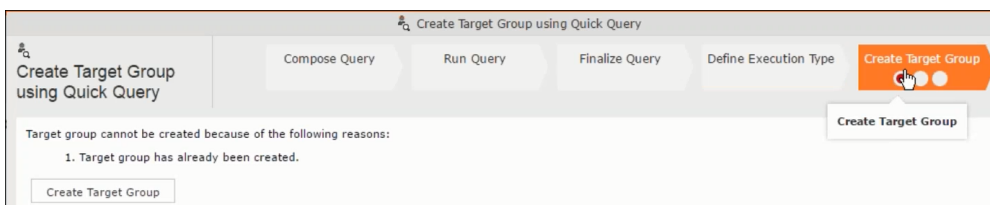
- To create the target groups and define the execution type using the New Quick Query option, perform one of the following:
  - Click the New Quick Query button from the Target Group & Execution Definition window. The Create Target Group using Quick Query window is opened.



2. Select the Root Info Area from the dropdown list.
3. Click **Run Query**. The query results are listed. Click Finalize Query.
4. Define if the query results are Private Query or Public Query. Enter a name in **Save As ...** field.
5. Click Save to finalize the results and attach the query results to this marketing activity. The Create Target Group window opens.



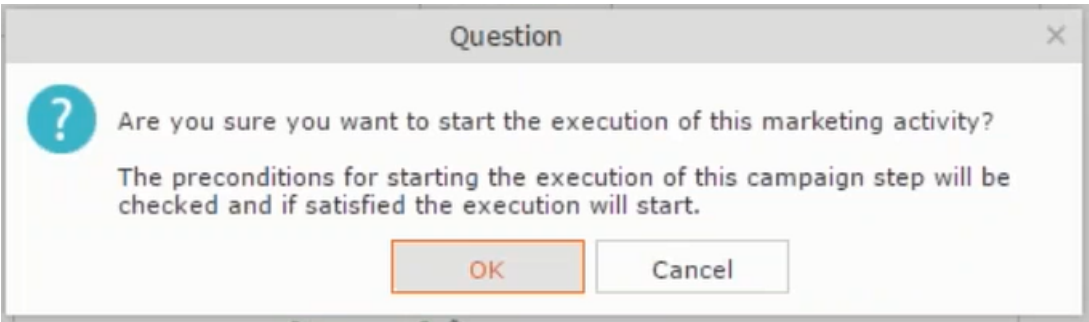
If any of the intermediate process steps are incomplete, you get a warning message, including if the target group is already created. A sample screenshot is provided below:



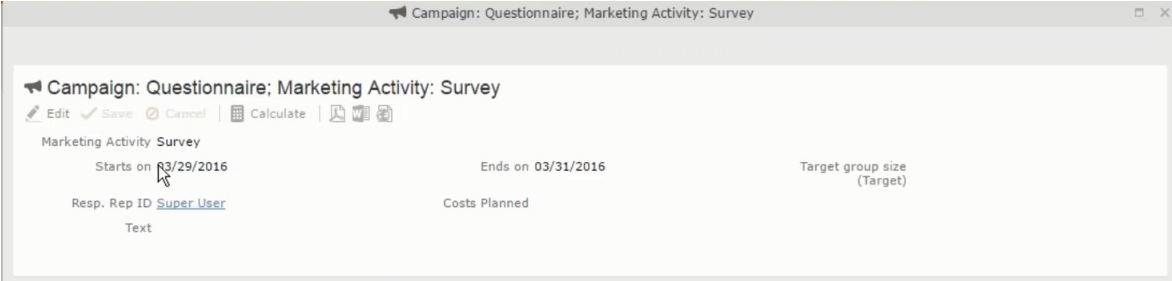
6. Click **Create Target Group** to complete creating the target group.

## Selecting or modifying the target group

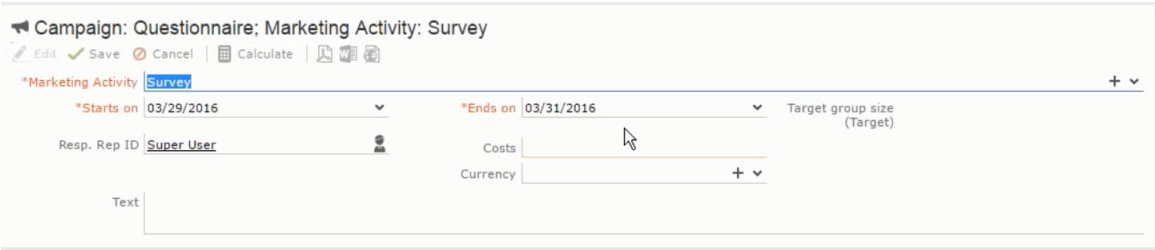
1. Open the required campaign in the campaign designer.
2. On the marketing activity container:
  - Click OK to expand the container.



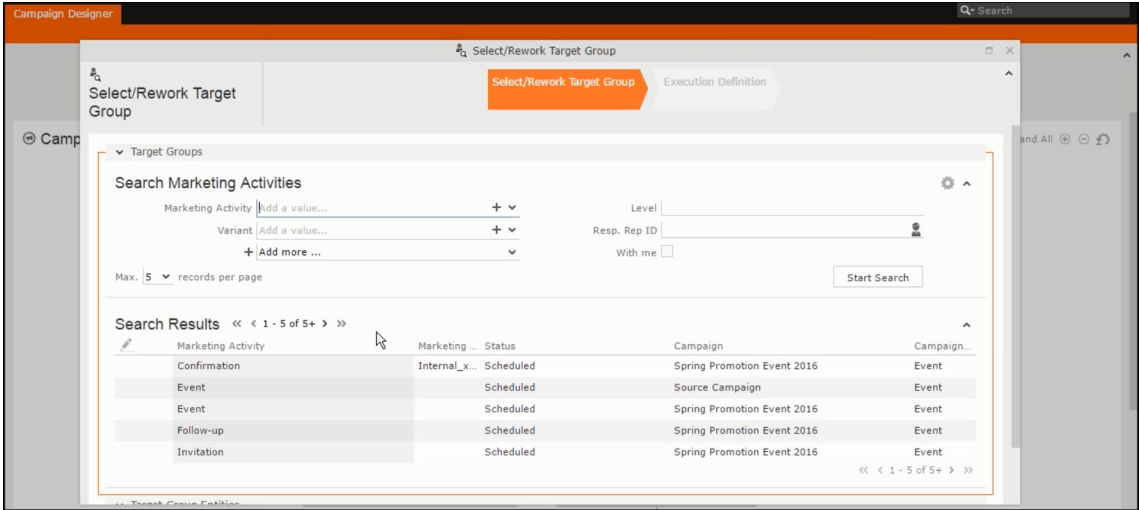
- Click the target group icon to open the **Target Group**



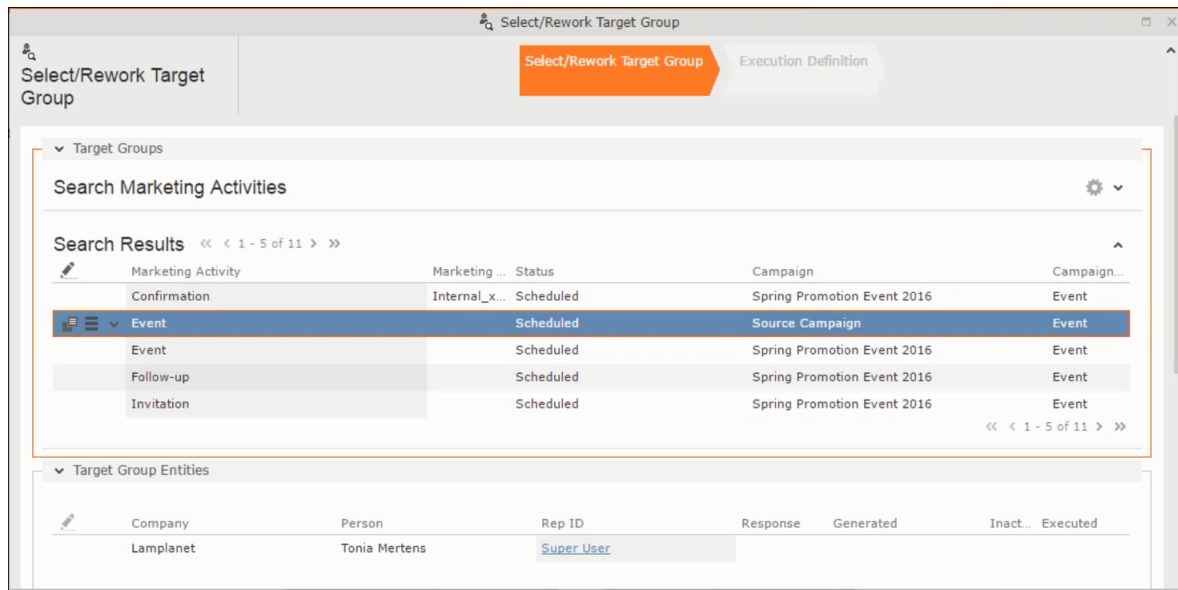
- and **Execution Definition** window.



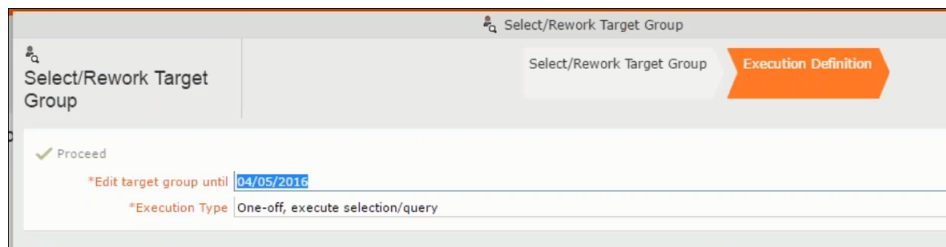
3. Click **Select/Rework Target Group**. The **Select/Rework Target Group** window displays.



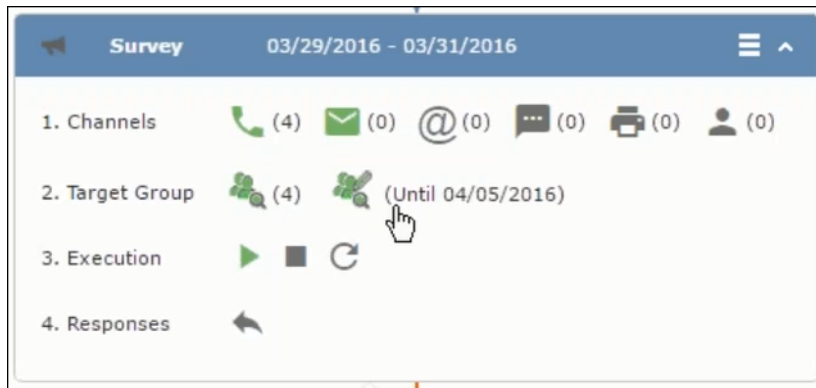
- You can search for marketing activities and select the desired marketing activity. The target group entities for the selected marketing activity are listed below.




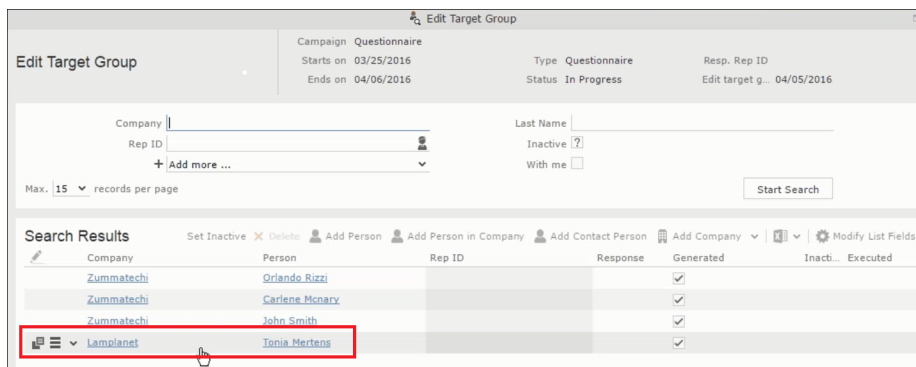
- Double click on the marketing activity to add the target group from the selected marketing activity to the target group of the current marketing activity. The Execution Definition window displays.



- Specify the following information:
  - Edit target group until** – Specify the date until the target group can be updated.
  - Execution Type** – Select the execution type from the drop-down list.
- Click Proceed. The campaign designer window opens.



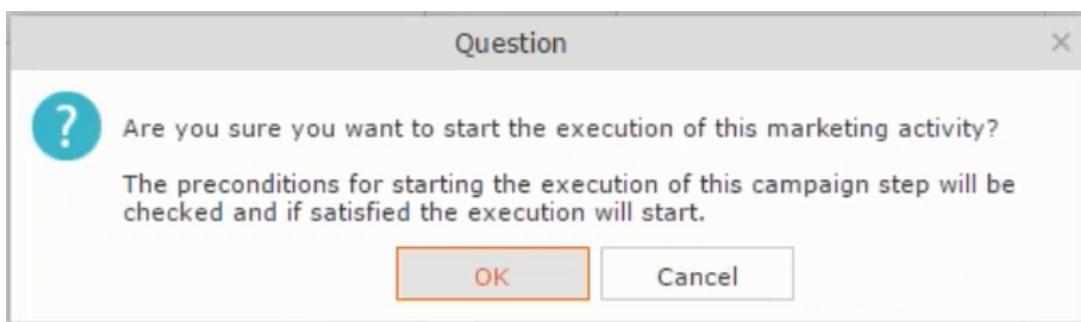
8. Click  to view the newly added participant to the target group.



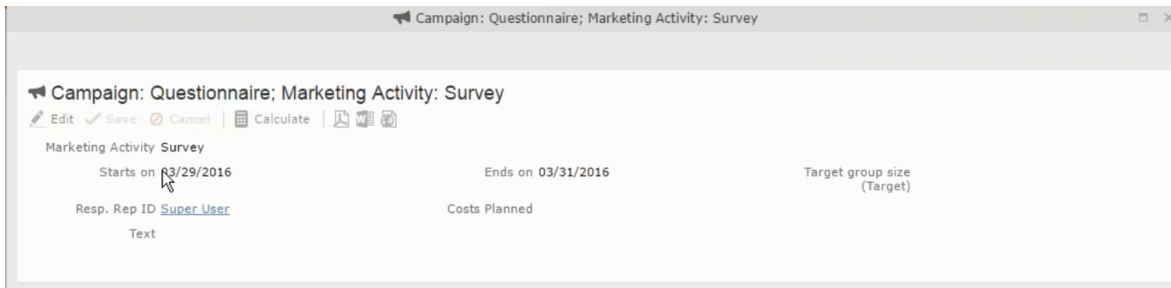
## Defining Execution Type

To define an execution type, perform the following:

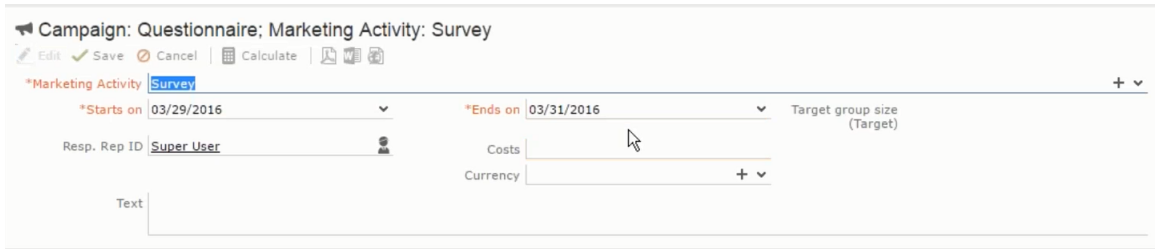
1. Open the required campaign in the campaign designer.
2. On the marketing activity container:
  - Click OK to expand the container.



- Click the target group icon to open the **Target Group**



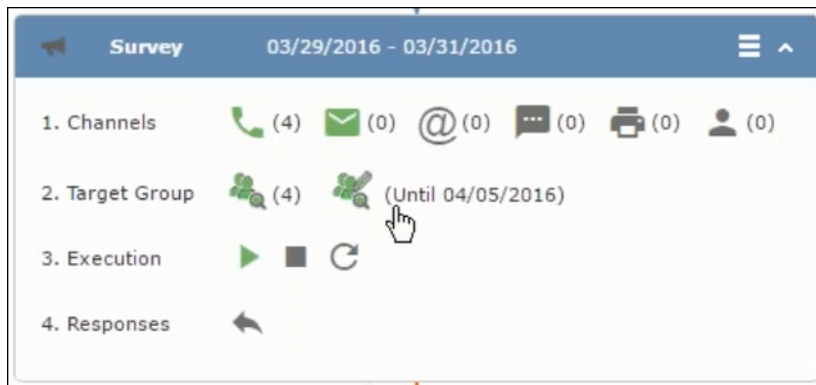
- and **Execution Definition** window.



3. Specify the following information:

- **Edit target group until** – Specify the date until the target group can be updated.
- **Execution Type** – Select the execution type from the drop-down list.


4. Click Proceed. The campaign designer window opens.



## Executing a Marketing Activity

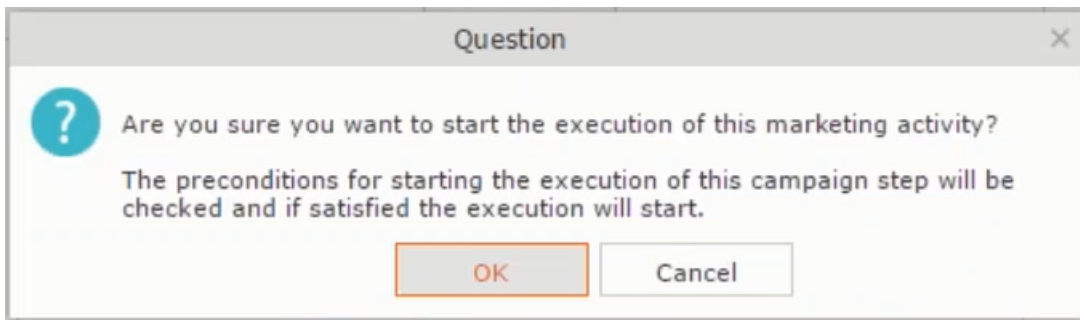
To execute a marketing activity, the following conditions should be met:

- All the selected channels and their formats should be defined. The selected channel icons would be green in color.
- The target groups should be defined. The Target group icons would be green in color.

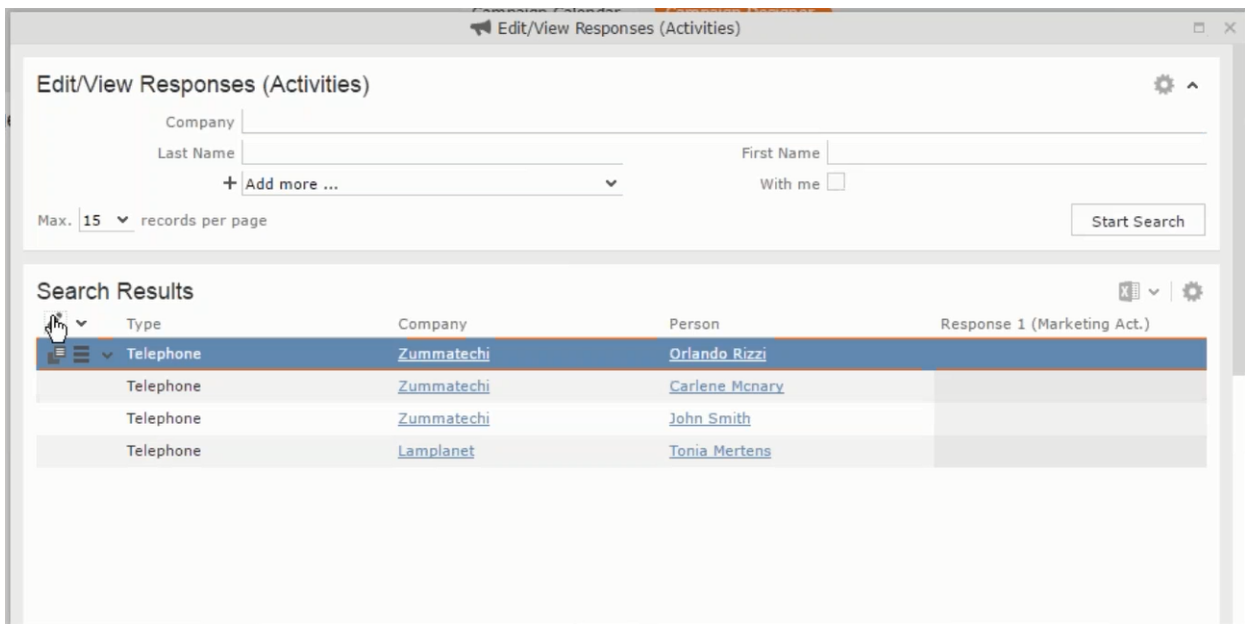
- The current date should be within the scope of the start and end dates of the campaign.
- The “Edit target group until date” has to be defined. This date is visible besides the edit target group icon (  ).

To execute a marketing activity, perform the following steps:

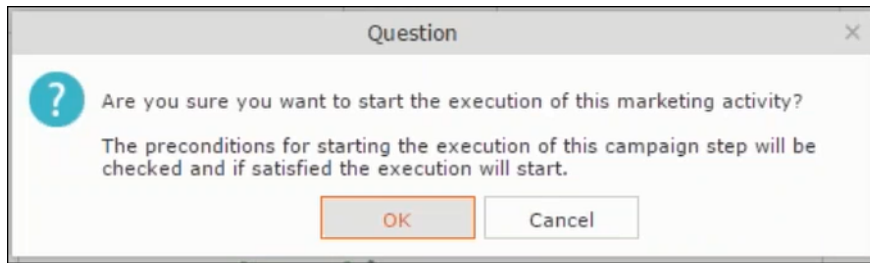
1. Open the required campaign in the campaign designer.
2. On the marketing activity container:
  - Click OK to expand the container.



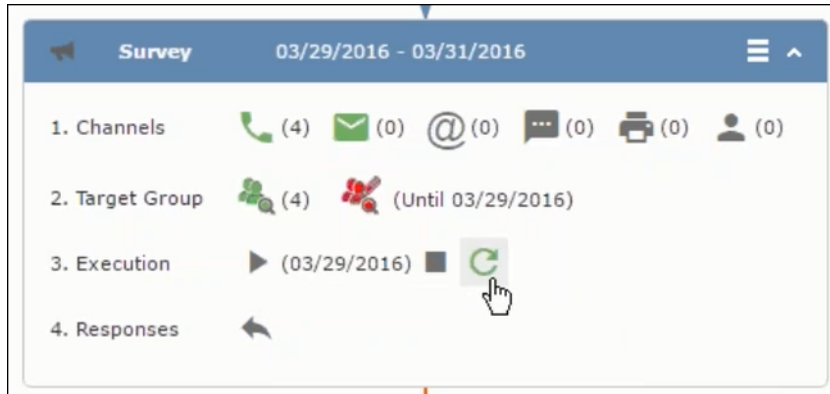
- The following screenshot shows the **Survey** marketing activity container.



3. Click the ► button on the **Execution** row. A query window pops up asking you to confirm the operation.



4. Click **OK**. A server notification informs you that the marketing activity has started and informs you when it is completed.




The Execute button is now greyed and the date on which the execution starts automatically is displayed in brackets besides it.

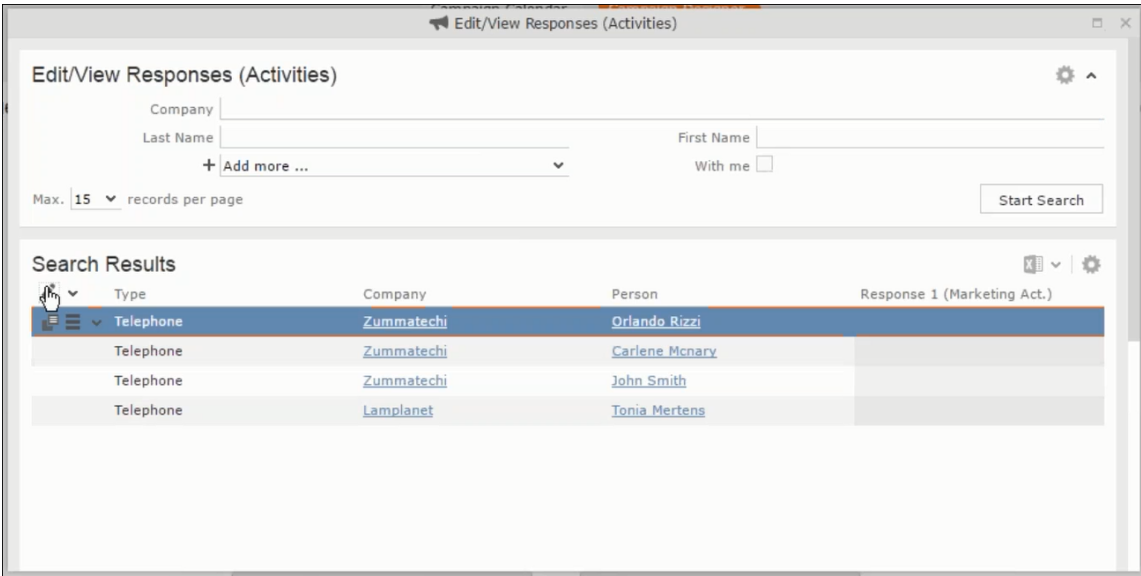
**Note:** The edit target group icon is now in red (✂). The abort button is greyed out once the execution starts. And reset button is now activated. The Responses button remains grey until the all the participants have responded.

## Editing/Viewing the Responses for a Marketing Activity

To edit or view the responses for a marketing activity, perform the following steps:

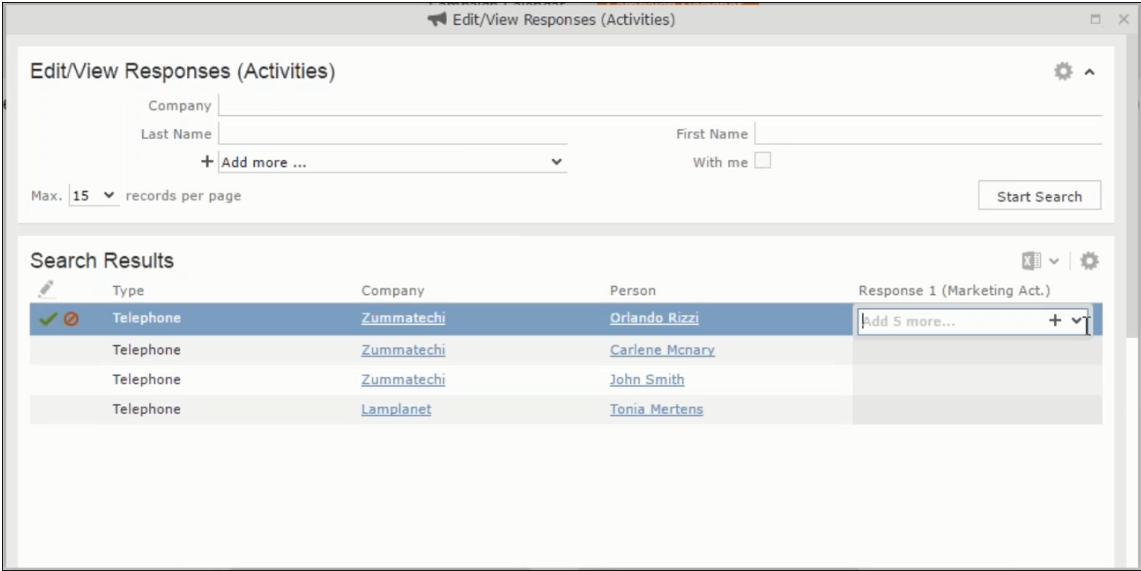
1. Click  icon in the responses row. The Edit/View Response (Activities) window opens.



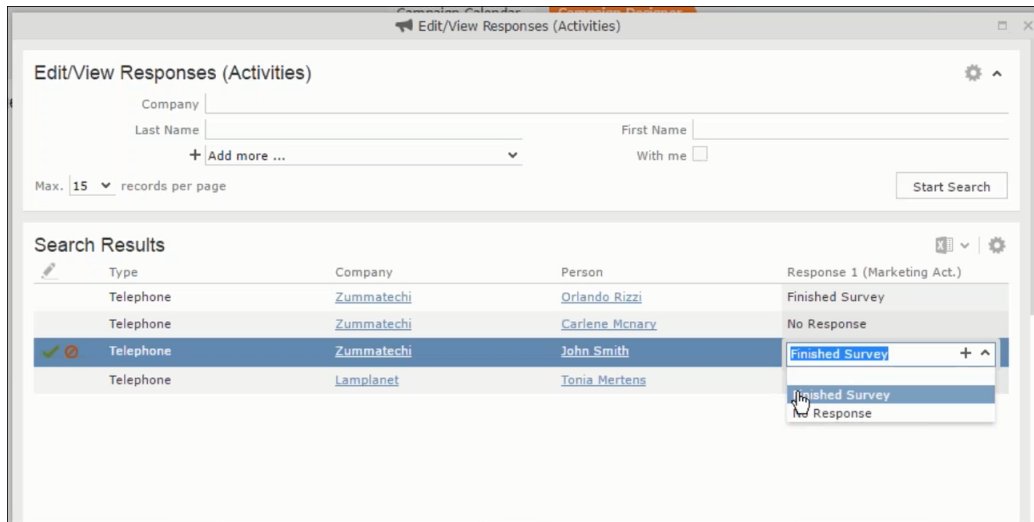


You can search for specific participants and view/edit their responses.

- 2. Select a row and click on Response 1 (Marketing Act.) column to activate and record the response.

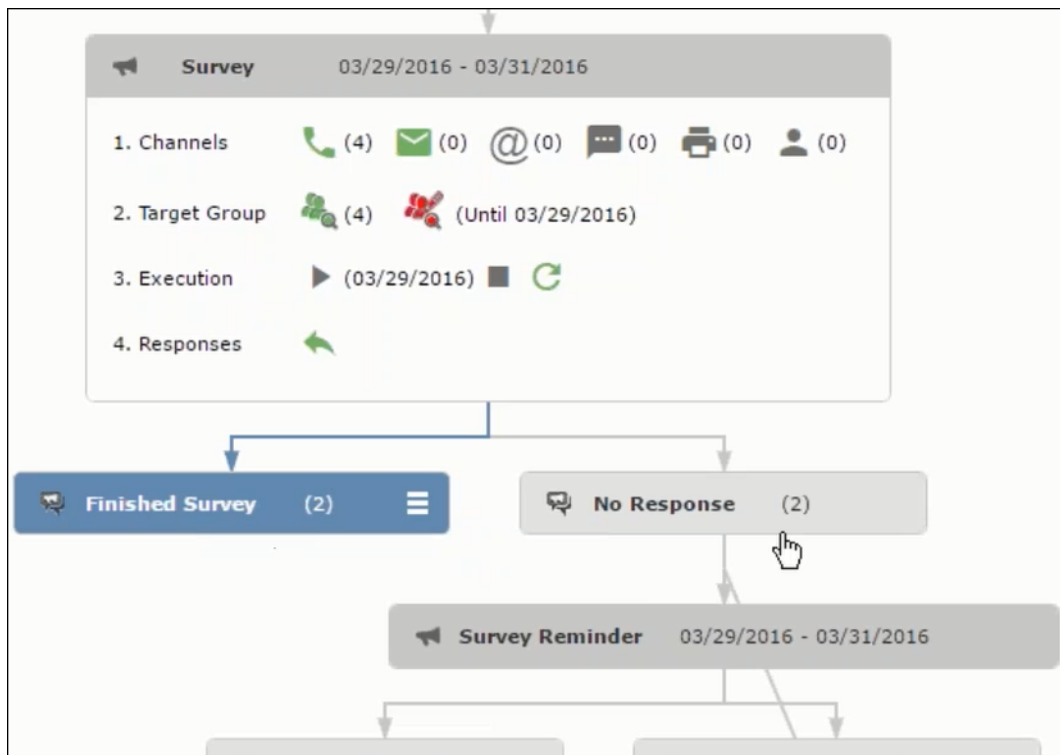


- 3. Click the drop-down list to select the response type. Click on the + button to add more response types to the response catalogue entries.



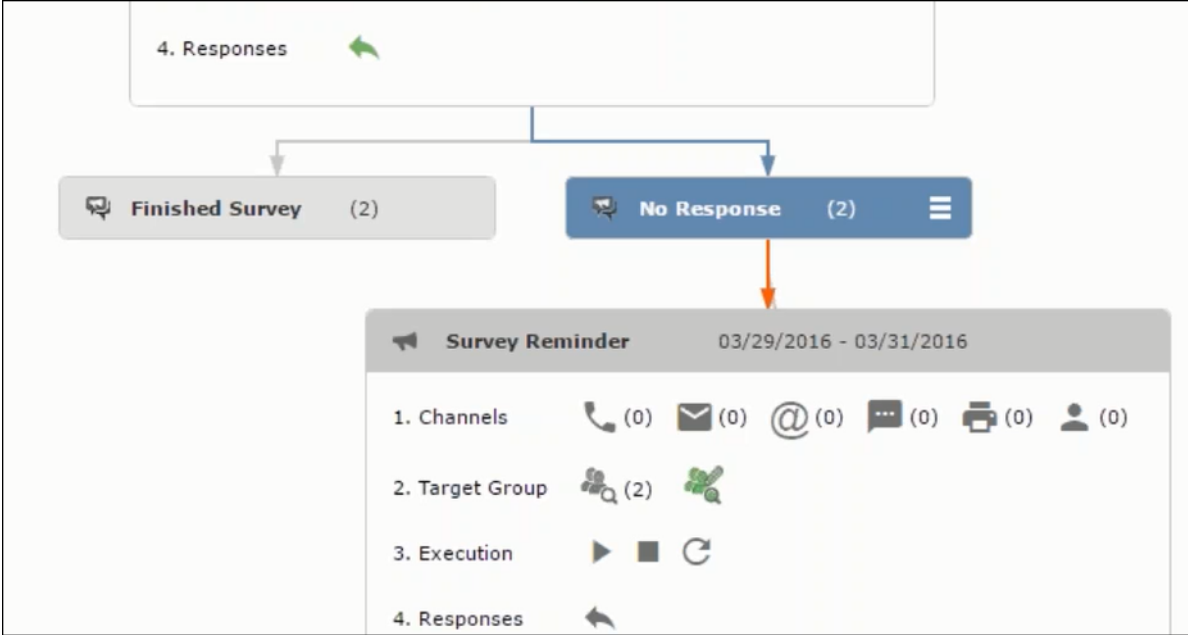
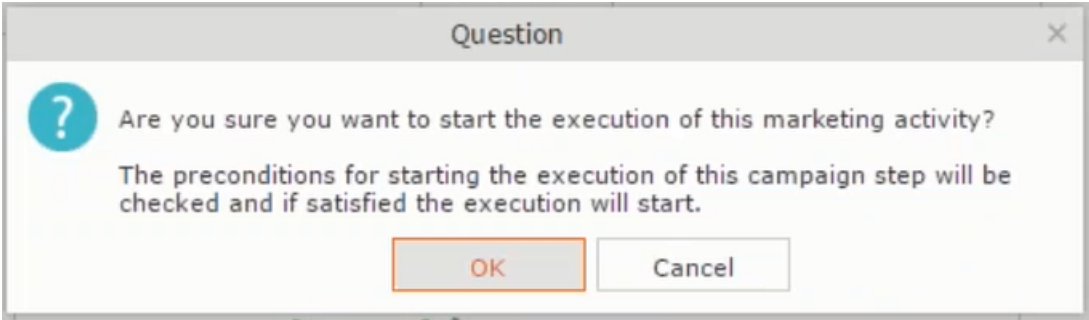
Edit the responses for all the participants.

- Close the window to come back to the campaign manager window. The response icon is be green in color. This shows that response for all the participants is recorded.



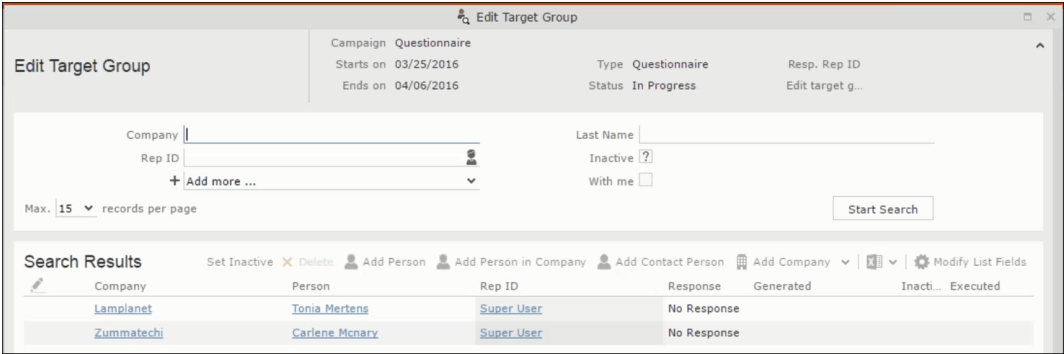
Notice the "(2)" in the response containers for the Survey marketing activity: **Finished Survey** and **No Response** show. This indicates that two participants completed the survey and two members did not respond.

- Click the button to expand the **Survey Reminder** follow-up marketing activity container for those participants who did not respond to the Survey.



You can see that two participants who did not respond are already added to the target group of the follow-up marketing activity.

- 6. Click  to open the **Edit Target Group** window for the **Survey Reminder** follow-up marketing activity.



You can see that the two members with “No Response” in the **Response** column are listed.

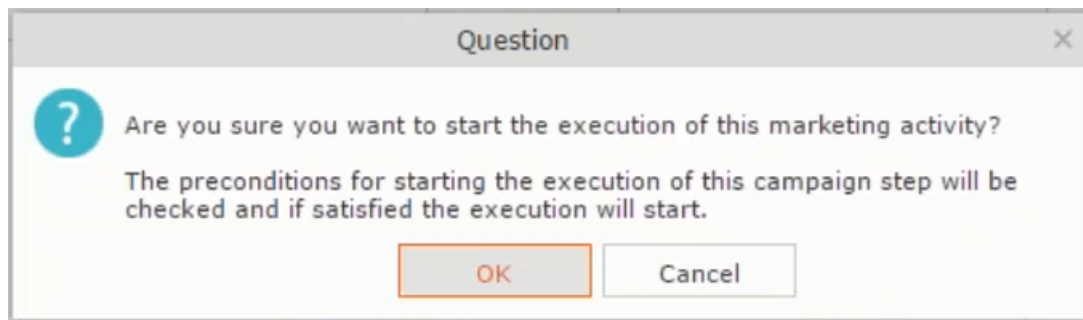
## Resetting the Marketing Activity Execution

Restarting a marketing activity is possible if the marketing activity execution is completed. It results in the following:

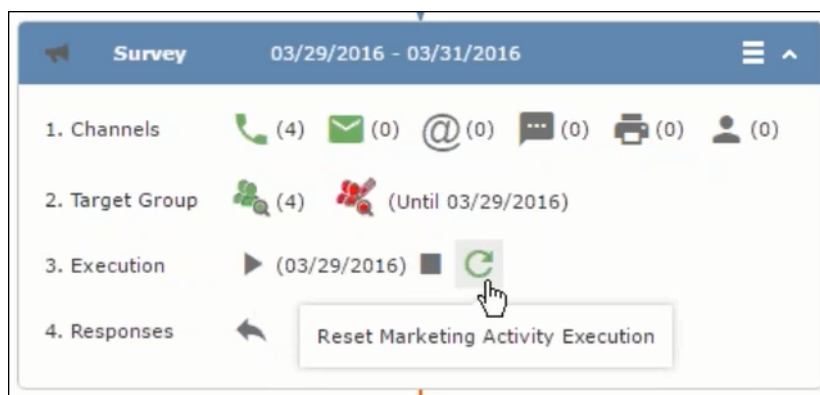
- All generated target group entities marked as “Generated” are deleted.
- The target group entities marked as “non Generated” are retained.
- The target group entities are regenerated based on the selection/query attached to this marketing activity.
- The target group entities that are marked as executed remains in the same state for the current target group.

To reset a marketing activity execution, perform the following:


1. Open the required campaign in the campaign designer.
2. On the marketing activity container, click to expand the container.

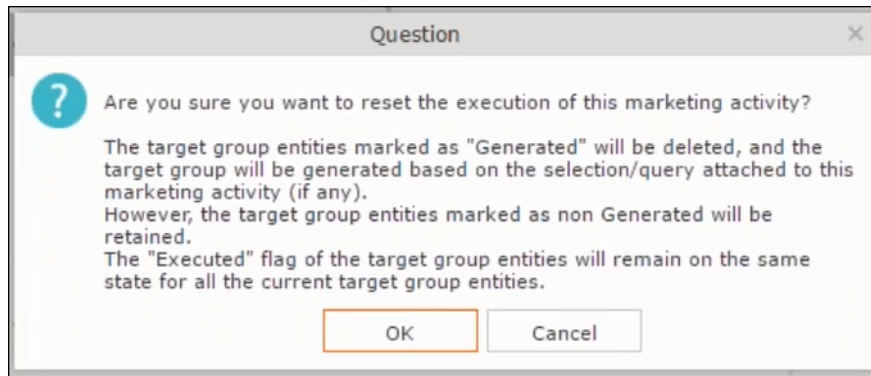


The following screenshot shows the **Survey** marketing activity container.

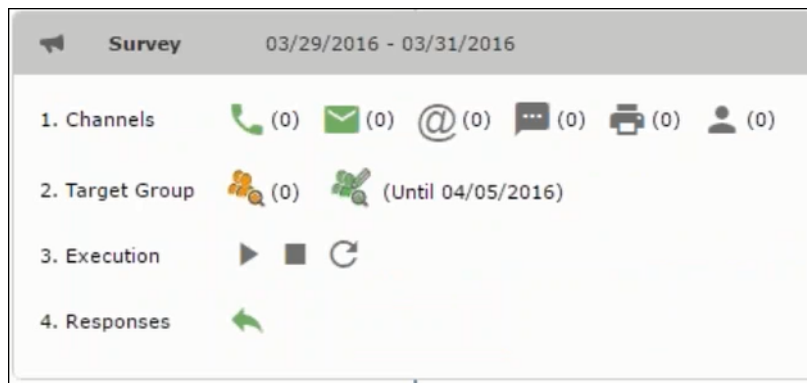


Notice that the execution button and the abort button are in grey. The reset button is in green and is active.

3. Click  to reset the marketing activity execution. A confirmation window displays.



4. Click **OK**. The target group is reset and the target group is regenerated. The edit target group until date is reset.

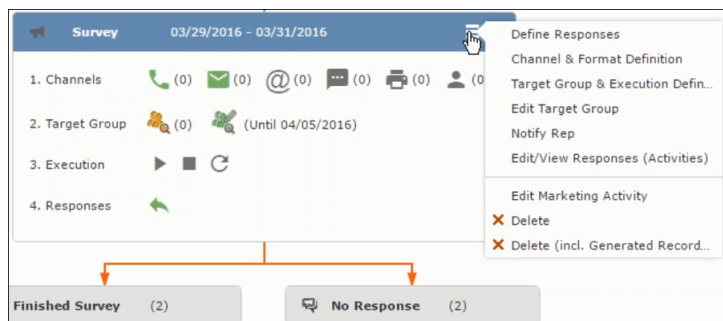


Notice that the Target group button is yellow and once the target group generation is completed, the execution button is active and ready for execution. The colors of the target group icon and execute button are in green.

## Notifying Reps about a marketing activity

To notify reps, perform the following:

1. From the context menu of a marketing activity container, select **Notify Rep**.



2. The Notify about record opens.

Notify about record

You can send this record to any other rep and/or external recipient. Please specify what you want to send:

Recipients:

Additional internal recipients:

Additional external recipients:

Subject:  
Survey (In Progress) | 03/29/2016

Body:

Insert Aurea CRM web link

Request a delivery receipt

Request a read receipt

Send Cancel

Enter the following information:

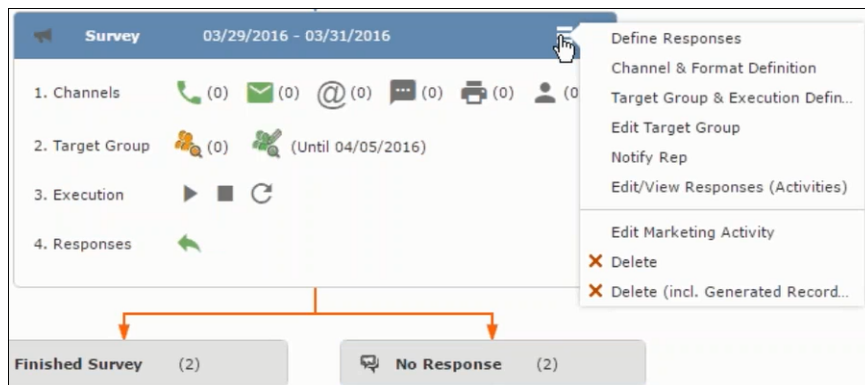
- **Recipients** – Add the internal and external recipients (reps) who receive the notification.
- **Subject** – Edit the subject of the notification email in this text field. You can also use the automatically generated subject.
- **Body** – Enter the notification content in the Body field.
- **Insert Aurea CRM web link** – Select this checkbox if you want to add the company URL in the notification.
- **Request a delivery receipt** – Select this checkbox if you want a receipt of delivery.
- **Request a read receipt** – Select this checkbox if you want to know if the notification was read by the recipient.

3. Click **Send** to send the notification to the selected reps.

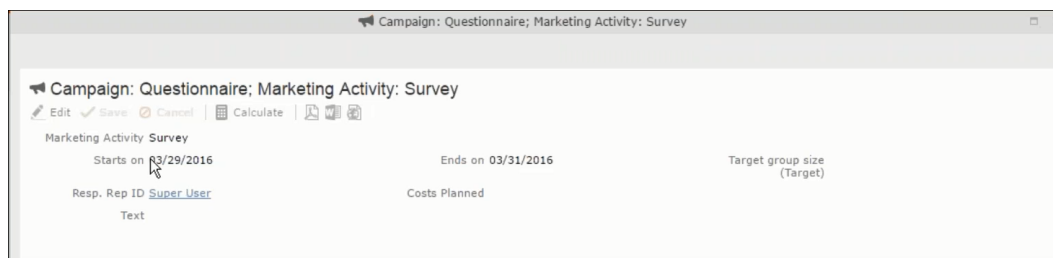
## Editing a Marketing Activity

To edit a marketing activity, perform the following:

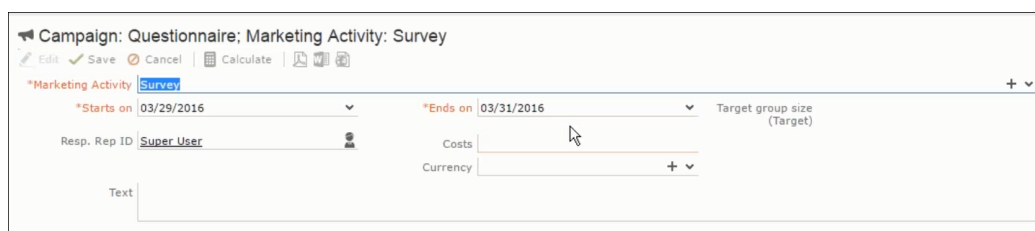
1. Open the required campaign in the campaign designer.
2. From the context menu of a marketing activity container, select **Edit Marketing Activity**.



3. The marketing activity window opens.



4. Click Edit to start editing the marketing activity.



5. Make the required changes and click **Save**.

## Email Campaign Management

Email Campaign Management Using Aurea Campaign Manager (formerly called Lyris HQ)

As part of a campaign, the marketing activities can be carried out using multiple channels, like letters, fax, telephone, and email. Generally the email channel is the most preferred channel for marketing activities. While Aurea CRM provides its own email channel, it does not provide all the capabilities of a dedicated Email marketing solution. In order to provide a sophisticated email marketing channel Aurea CRM is integrated with Aurea Lyris HQ, a full-fledged Email marketing solution. Aurea CRM Enterprise edition users can use Lyris HQ to handle their email marketing activities and take full advantage of the sophisticated email marketing capabilities of Lyris HQ.

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**Note:** Aurea CRM Enterprise license enables you to access Lyris HQ features. In order to use Lyris HQ features you require a separate license for Lyris HQ. Please contact [email:support@aura.com](mailto:support@aura.com) for more information on licensing Lyris HQ. You have to enable Lyris HQ in Aurea CRM in order to use Lyris HQ features from Aurea CRM.

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Aurea Campaign Manager (CAM) notifies Aurea CRM of the actions it performs by using the event flow mechanism to send event notifications. Events are generated by the Aurea Campaign Manager, when it performs some action on Contacts, Mailing lists, Segments, and Messages. Events are also generated by user actions, like opening an email message or clicking a response link provided within the email message. The event notifications generated by the Campaign Manager is placed in event queues in the CRM Sync Middleware and received by the CRM.Server listening for event notifications.

Cross product integration between Aurea CRM and Aurea Lyris HQ allows you to perform the following tasks:

- Transfer a marketing activity to Lyris HQ.
- Transfer a CRM Target group to Lyris HQ.
- Receive Notifications and updates from Lyris HQ.

The following sections provide more details:



## Transferring a Marketing Activity to Lyris HQ

Learn to transfer market activity to Lyris HQ.

As part of a campaign you create one or more marketing activities. These activities could be conducted via multiple channels with email as one of the marketing channels. You can then transfer the marketing activity to Lyris and let Lyris HQ handle the marketing activity through the email channel.

This section describes how to transfer a marketing activity to Lyris, however it does not explain the full steps involved in creating a new campaign with marketing activities. For more information on working with marketing activity using the Campaign Designer, see [Working with Marketing Activities](#) on page 368.

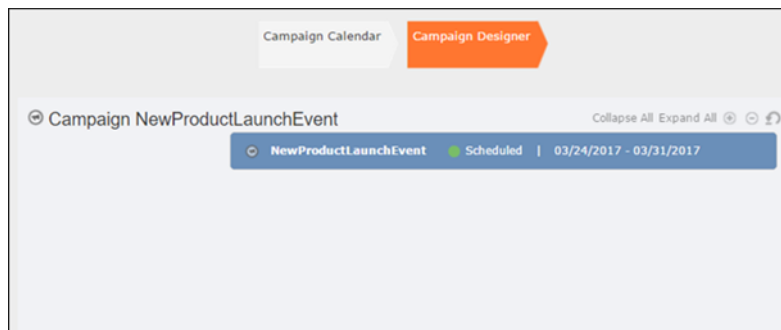
You can transfer a marketing activity to Lyris HQ from the campaign designer or from the standard editor for marketing activities.

To illustrate the process of Lyris HQ as the email marketing channel, we can create a **NewProductLaunchEvent** campaign and invite our loyal and potential customers to the event, as part of the marketing activity. The invitations are extended using only the email channel.

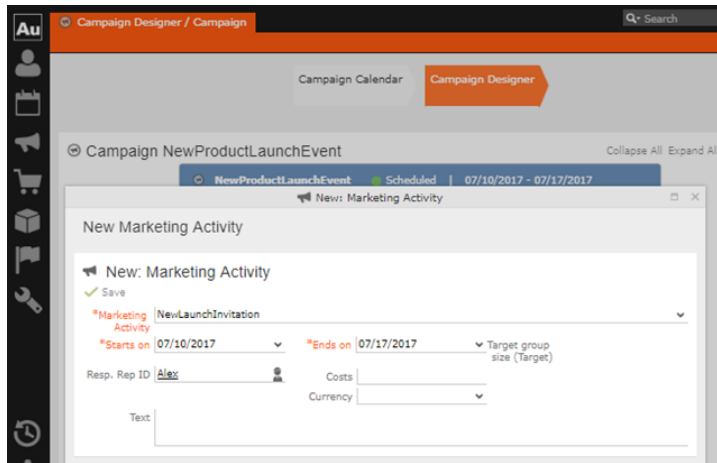
### Transferring from the Campaign Designer

To transfer a marketing activity to Lyris HQ from the campaign designer, perform the following:

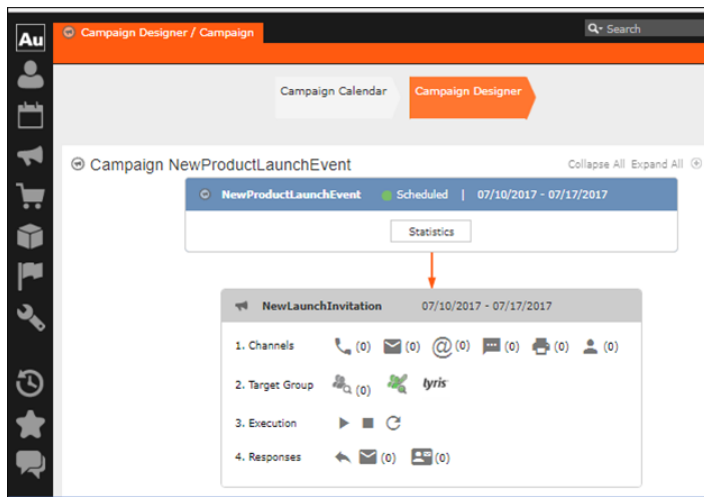
1. Open an existing campaign or create a new campaign. For more information, see [Viewing a campaign](#) on page 359 or [Creating a new campaign from scratch](#) on page 360. The following screenshot shows the example **NewProductLaunchEvent** campaign.



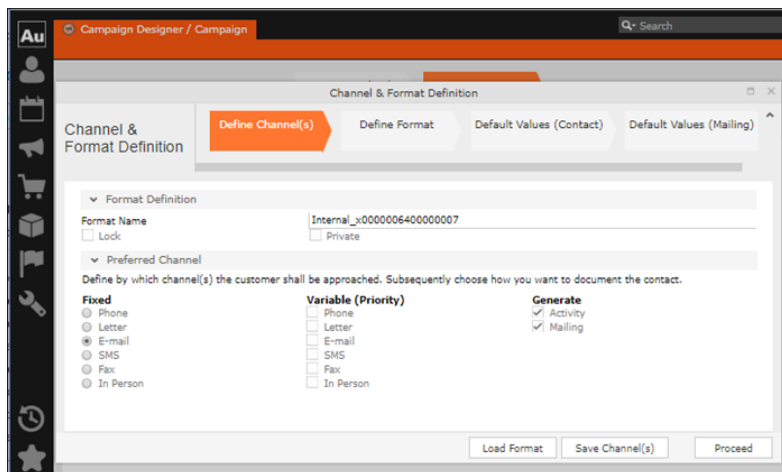
2. From the campaign container context menu select New Marketing Activity. The New Marketing Activity window displays.



3. Enter the required details. In this example we create a NewLaunchInvitation as the Marketing Activity.
4. Click Save to create the new marketing activity container in the campaign designer.



5. Click (email channel). The Channel & Format Definition page displays.



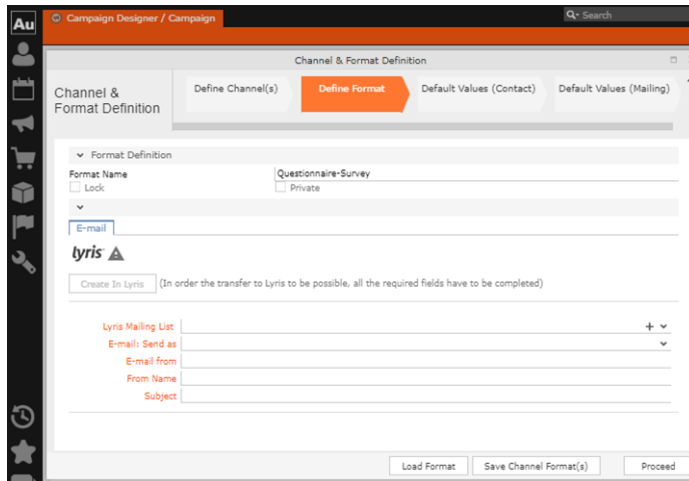
- a. Select the E-mail channel radio button under the Fixed column.
- b. Select the Activity and Mailing options under the Generate column. These are optional.

---

**Note:** If you wish to use multiple channels for the marketing activity, you can select the E-mail checkbox along with other required channels under the Variable (Priority) column.

---

6. Click Save Channel(s).
7. Click Proceed, to go to the format definition phase. The Define Format page displays.



You can see that Lyris Email channel definition page is available. If Lyris is not enabled then the standard email channel definition page would be visible. Contact your CRM administrator to enable the Lyris email marketing channel.

8. Populate the fields as described below. These fields are mandatory in order to transfer the marketing activity to Lyris.

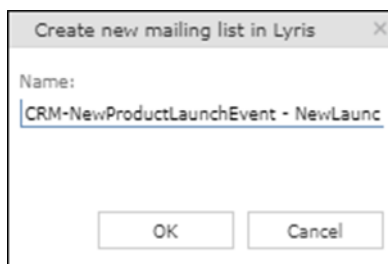
---

**Note:** The Create in Lyris button is activated once all the fields are populated and the channel format is saved.

---

- **Lyris Mailing List:** Click to get a drop-down list of mailing lists in Lyris. Select the required mailing list. You can also create a new mailing list. To create a new mailing list, perform the following:

1. Click +. The Create new mailing list in Lyris dialog displays.

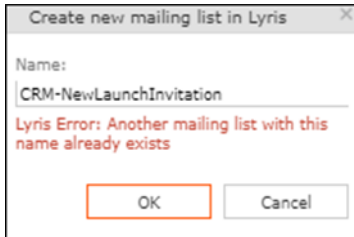


A default name (CRM-NewProductLaunchEvent - NewLaunchInvitation) is provided which is a concatenation of three names: default mailing list prefix configured in the CRM Designer (CRM-) + the campaign name (NewProductLaunchEvent) + the marketing activity name (NewLaunchInvitation).

In case the marketing activity does not belong to a campaign then the prefix and the activity name is used. For this example, CRM-NewLaunchInvitation. You can rename it to a desired name. In this example, we change the name to CRM- NewLaunchInvitation.

2. Click OK. A new blank mailing list is created in Lyris.

If for some reason the mailing list could not be created in Lyris then the dialog displays the appropriate error message. For example, the following screenshot shows the error message that a mailing with the same name already exists.

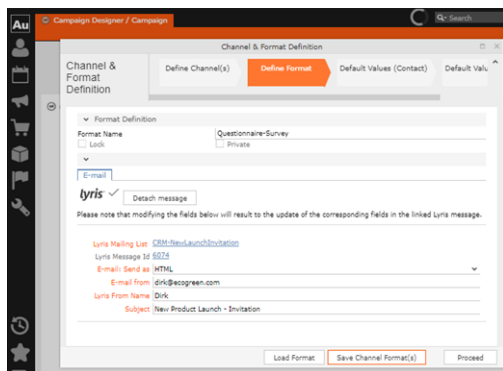


- **E-mail: Send as:** Select the desired format of the email you wish to send: HTML or Text
- **E-mail From:** Enter the email address of the marketing email sender.
- **From Name:** Enter the name of the sender.
- **Subject:** Enter the subject for the email.

**Note:** The above fields are used as properties of the email messages that are created in Lyris.

9. Click Save Channel Format(s). After the channel format is saved, the Create in Lyris button gets activated.
10. Click Create in Lyris.

A dummy message is created in Lyris for the marketing activity. Depending on your selection for the E-mail Send as field the dummy message is a text or HTML message. A tick appears besides the **lyris** icon on successful creation of the message. And a Detach message button displays. The ids for the mailing list and message created in Lyris are displayed along with the links to the instances in Lyris. See the screenshot below.



Click Detach Message to delete the message created in Lyris. Once the message is detached, all the attributes of the message are cleared, including the links in the Lyris Message ID and Lyris Mailing List fields. The corresponding message created in Lyris is also deleted. If the message is already sent then any responses received for the message are ignored by Lyris and Aurea CRM does not get any event corresponding to the message.

11. Click Save Channel Format(s).

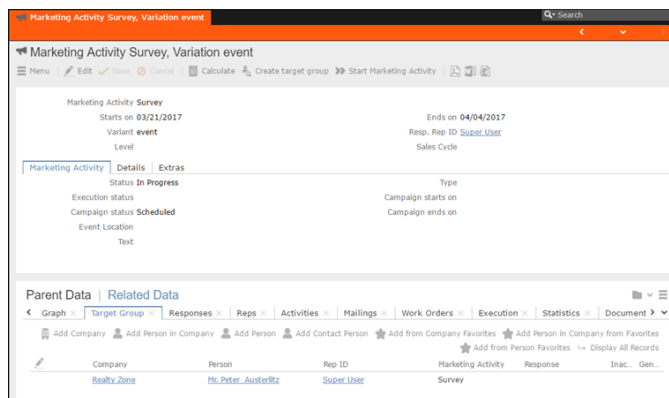
12. Click Proceed.

## Transferring from the Standard Editor

If you prefer to use the standard editor for creating marketing activities instead of the Campaign Designer, you can still transfer a marketing activity to Lyris from the standard editor.

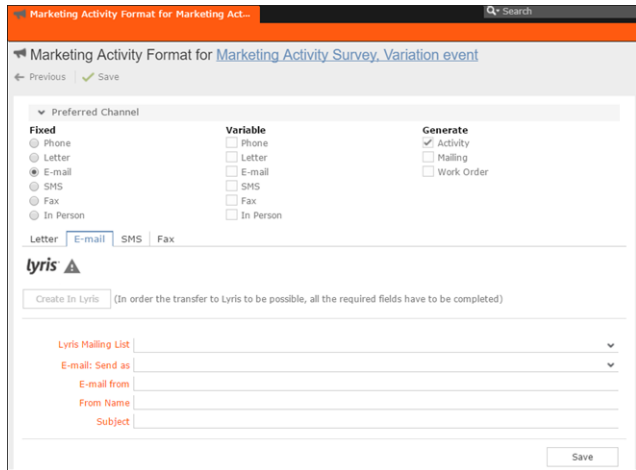
To transfer a marketing activity from the standard editor to Lyris, perform the following:

1. Select Marketing > Marketing Activities from the CRM menu. The Search Marketing activities page displays.
2. Enter the search filters and click Start Search. The search results list displays.
3. Open the context menu of the required marketing activity from the result list and select Tab View or Tree View. The Marketing Activity window displays.



**Note:** Double clicking a marketing activity from the result list opens the marketing activity in the campaign designer.

4. Select Create Marketing Activity Format from the context menu. The Marketing Activity Format window displays.
5. Select the preferred channel. Click the E-mail radio button under Fixed, then click the Email tab.



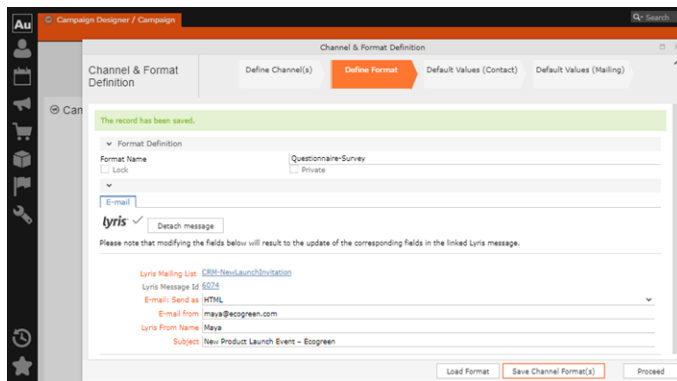
You should see the Lyris Email channel definition page. If Lyris is not enabled then the standard email channel definition page would be visible. Contact your CRM administrator to enable the Lyris email marketing channel.

- The remaining steps are similar to those listed for transferring a marketing activity to Lyris from the campaign designer, see steps 8 to 10 in the topic [Transferring from the Campaign Designer](#) on page 427.

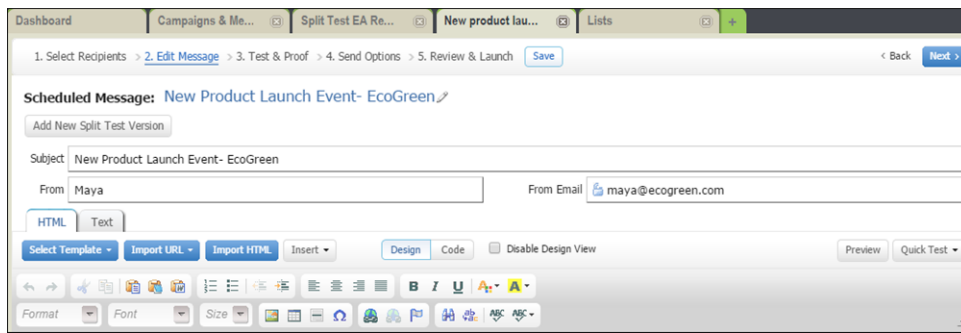
### Making changes to the marketing activity transferred to Lyris

When you modify and save the message details of a marketing activity that is already transferred to Lyris, the changes are automatically transferred to the corresponding Lyris instance of the marketing activity's message.

For example, in the screenshots below, the E-mail from, Lyris From Name and Subject field values are changed and the channel format is saved. The screenshots of Lyris show the changes reflected in the corresponding fields of the message.



The values are changed from **dirk@ecogreen.com**, Dirk, and “New Product Launch Invitation” to **maya@ecogreen.com**, Maya, and “New Product Launch Event – Ecogreen” respectively. The corresponding changes are reflected in the Lyris message.

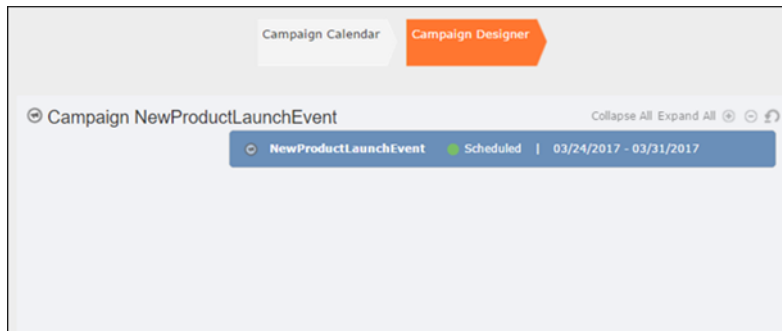


**Note:** Automatic transfer of changes to Lyris can take some time.

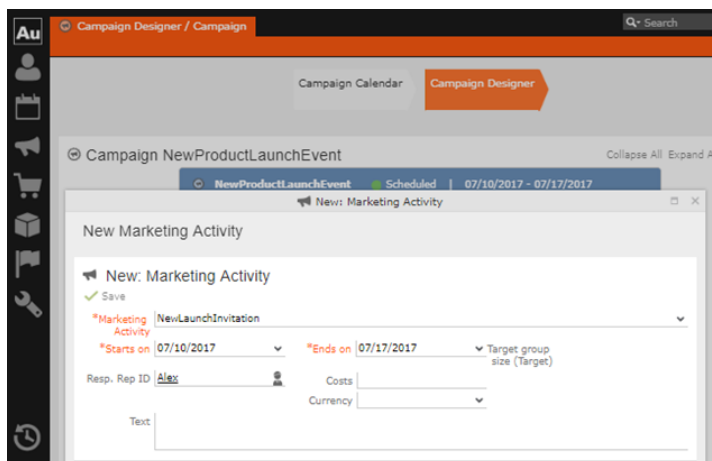
## Transferring from the Campaign Designer

To transfer a marketing activity to Lyris HQ from the campaign designer, perform the following:

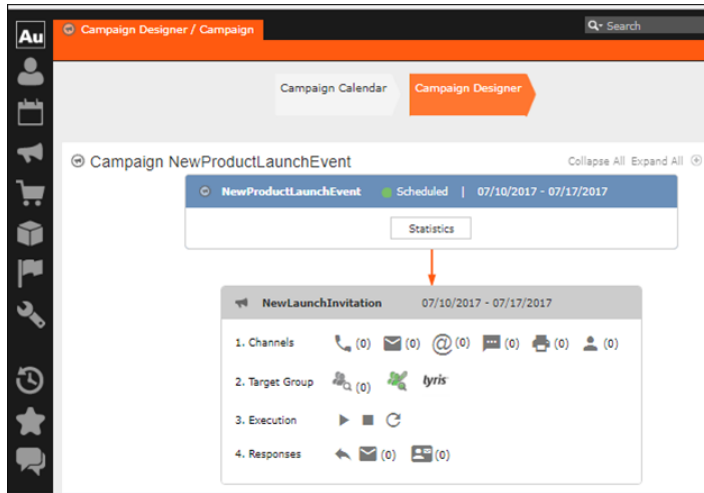
1. Open an existing campaign or create a new campaign. For more information, see [Viewing a campaign](#) on page 359 or [Creating a new campaign from scratch](#) on page 360. The following screenshot shows the example **NewProductLaunchEvent** campaign.



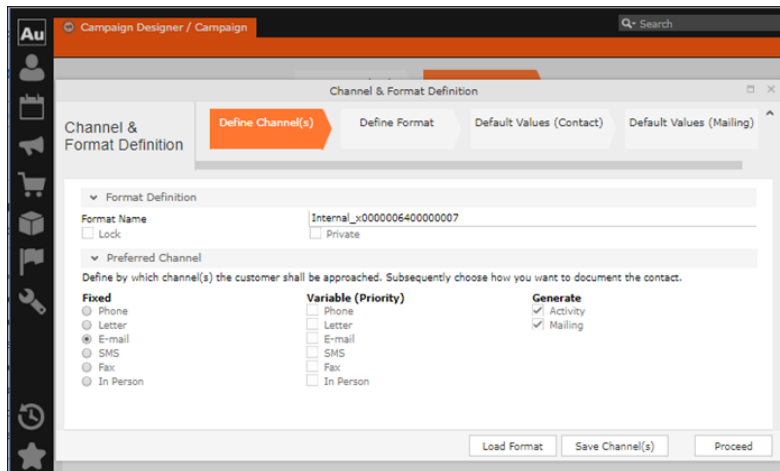
2. From the campaign container context menu select New Marketing Activity. The New Marketing Activity window displays.



3. Enter the required details. In this example we create a NewLaunchInvitation as the Marketing Activity.
4. Click Save to create the new marketing activity container in the campaign designer.



5. Click (email channel). The Channel & Format Definition page displays.



- a. Select the E-mail channel radio button under the Fixed column.
- b. Select the Activity and Mailing options under the Generate column. These are optional.

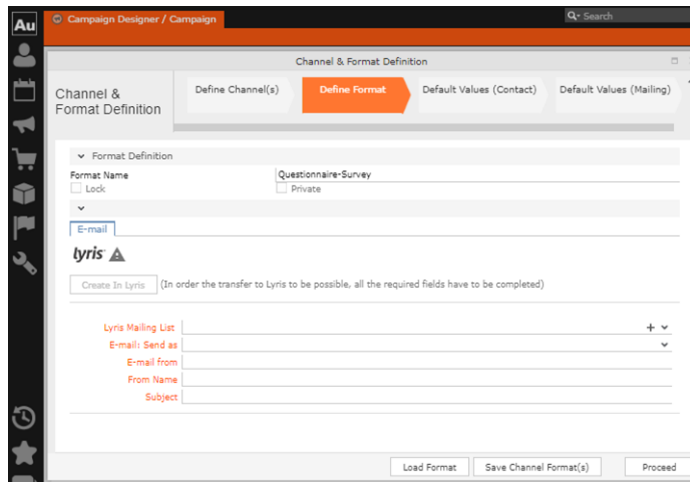
---

**Note:** If you wish to use multiple channels for the marketing activity, you can select the E-mail checkbox along with other required channels under the Variable (Priority) column.

---

6. Click Save Channel(s).
7. Click Proceed, to go to the format definition phase. The Define Format page displays.





You can see that Lyris Email channel definition page is available. If Lyris is not enabled then the standard email channel definition page would be visible. Contact your CRM administrator to enable the Lyris email marketing channel.

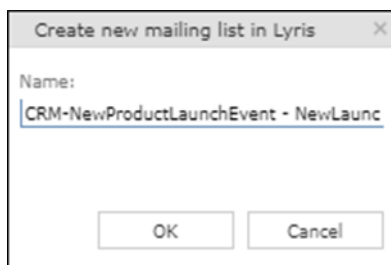
8. Populate the fields as described below. These fields are mandatory in order to transfer the marketing activity to Lyris.

---

**Note:** The Create in Lyris button is activated once all the fields are populated and the channel format is saved.

---

- Lyris Mailing List: Click to get a drop-down list of mailing lists in Lyris. Select the required mailing list. You can also create a new mailing list. To create a new mailing list, perform the following:
  1. Click +. The Create new mailing list in Lyris dialog displays.

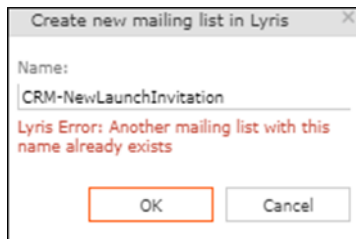


A default name (CRM-NewProductLaunchEvent - NewLaunchInvitation) is provided which is a concatenation of three names: default mailing list prefix configured in the CRM Designer (CRM-) + the campaign name (NewProductLaunchEvent) + the marketing activity name (NewLaunchInvitation).

In case the marketing activity does not belong to a campaign then the prefix and the activity name is used. For this example, CRM-NewLaunchInvitation. You can rename it to a desired name. In this example, we change the name to CRM- NewLaunchInvitation.

2. Click OK. A new blank mailing list is created in Lyris.

If for some reason the mailing list could not be created in Lyriss then the dialog displays the appropriate error message. For example, the following screenshot shows the error message that a mailing with the same name already exists.

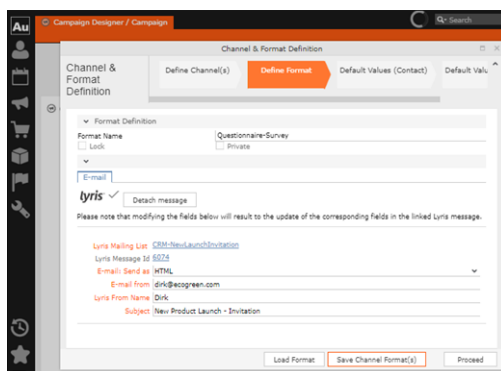


- **E-mail: Send as:** Select the desired format of the email you wish to send: HTML or Text
- **E-mail From:** Enter the email address of the marketing email sender.
- **From Name:** Enter the name of the sender.
- **Subject:** Enter the subject for the email.

**Note:** The above fields are used as properties of the email messages that are created in Lyriss.

9. Click Save Channel Format(s). After the channel format is saved, the Create in Lyriss button gets activated.
10. Click Create in Lyriss.

A dummy message is created in Lyriss for the marketing activity. Depending on your selection for the E-mail Send as field the dummy message is a text or HTML message. A tick appears besides the **lyriss** icon on successful creation of the message. And a Detach message button displays. The ids for the mailing list and message created in Lyriss are displayed along with the links to the instances in Lyriss. See the screenshot below.



Click Detach Message to delete the message created in Lyris. Once the message is detached, all the attributes of the message are cleared, including the links in the Lyris Message ID and Lyris Mailing List fields. The corresponding message created in Lyris is also deleted. If the message is already sent then any responses received for the message are ignored by Lyris and Aurea CRM does not get any event corresponding to the message.

11. Click Save Channel Format(s).

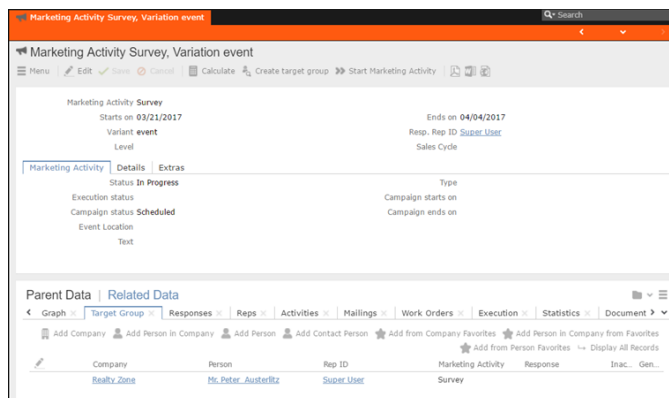
12. Click Proceed.

## Transferring from the Standard Editor

If you prefer to use the standard editor for creating marketing activities instead of the Campaign Designer, you can still transfer a marketing activity to Lyris from the standard editor.

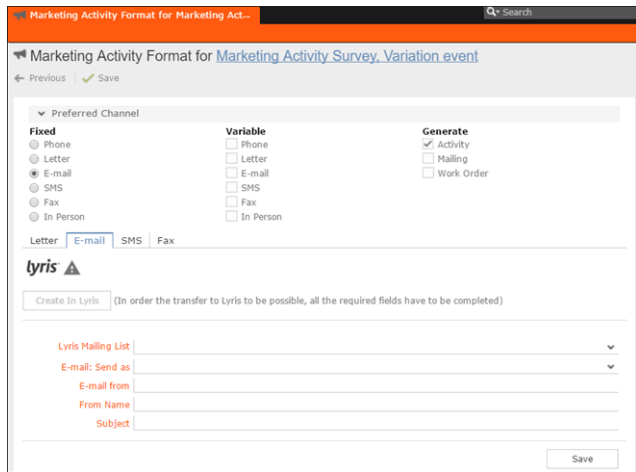
To transfer a marketing activity from the standard editor to Lyris, perform the following:

1. Select Marketing > Marketing Activities from the CRM menu. The Search Marketing activities page displays.
2. Enter the search filters and click Start Search. The search results list displays.
3. Open the context menu of the required marketing activity from the result list and select Tab View or Tree View. The Marketing Activity window displays.



**Note:** Double clicking a marketing activity from the result list opens the marketing activity in the campaign designer.

4. Select Create Marketing Activity Format from the context menu. The Marketing Activity Format window displays.
5. Select the preferred channel. Click the E-mail radio button under Fixed, then click the Email tab.



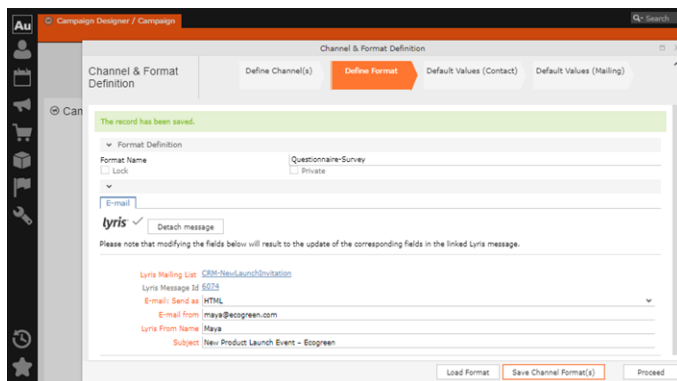
You should see the Lyris Email channel definition page. If Lyris is not enabled then the standard email channel definition page would be visible. Contact your CRM administrator to enable the Lyris email marketing channel.

- The remaining steps are similar to those listed for transferring a marketing activity to Lyris from the campaign designer, see steps 8 to 10 in the topic [Transferring from the Campaign Designer](#) on page 427.

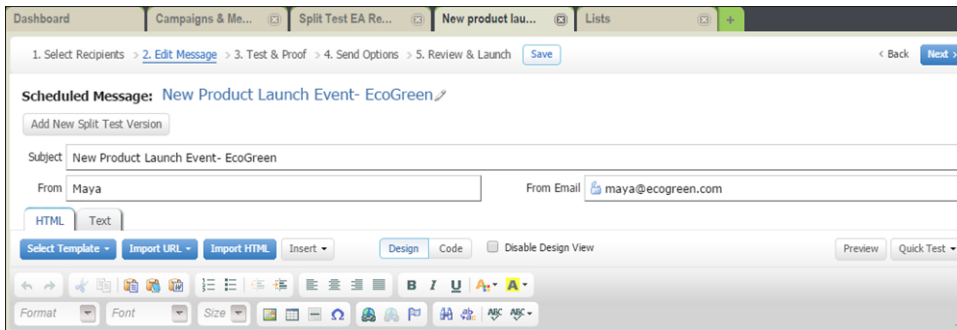
## Making changes to the marketing activity transferred to Lyris

When you modify and save the message details of a marketing activity that is already transferred to Lyris, the changes are automatically transferred to the corresponding Lyris instance of the marketing activity’s message.

For example, in the screenshots below, the E-mail from, Lyris From Name and Subject field values are changed and the channel format is saved. The screenshots of Lyris show the changes reflected in the corresponding fields of the message.



The values are changed from **dirk@ecogreen.com**, Dirk, and “New Product Launch Invitation” to **maya@ecogreen.com**, Maya, and “New Product Launch Event – Ecogreen” respectively. The corresponding changes are reflected in the Lyris message.



**Note:** Automatic transfer of changes to Lyris can take some time.

## Deleting an Email Marketing Activity in Aurea CRM

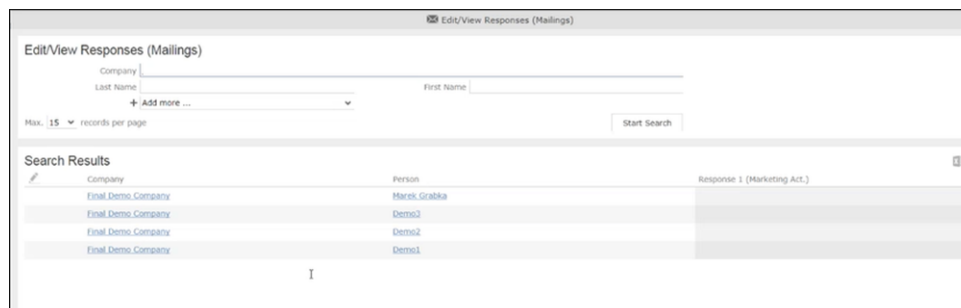
Deleting an email marketing activity in Aurea CRM also deletes the corresponding segment created in the Aurea Campaign Manager. If any messages are received by the Aurea Campaign Manager related to the deleted Segment (marketing activity) then those messages are ignored by the Aurea Campaign Manager. A notification is also generated for the Rep responsible for the marketing activity.

The marketing activity container menu provides two delete menu options: Delete, and Delete (Incl Generated Records). Both the options work the same, with the added ability to also clear all the links and records generated in the scope of the marketing activity.

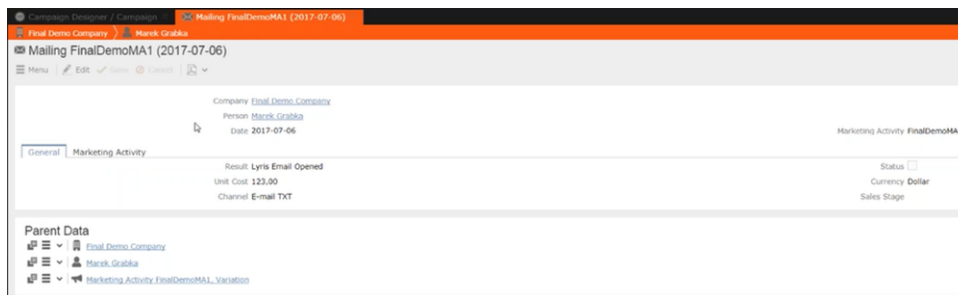
## Default Values for Marketing Activity Mailings

The default Mailings values defined for a marketing activity are included in the Mailings records maintained for all email marketing activities and responses to an email message for each target group member. The Mailings record also maintains the status of an email message sent to the corresponding Contacts in Lyris. The Mailings record is updated in Aurea CRM by the events (EmailOpenedMessage, DeliveryStatusMessage, and BounceDetailsMessage) generated by Lyris. The Mailing record is first created by Aurea CRM on receiving the DeliveryStatusMessage event, when Lyris sends the email message to the target group member.

Click the response icon to open the Edit /View Responses (Mailings) page. See the screenshot below:



Opening a Mailings records shows the default values set in the Default Values (Mailings) step of the Channel and Format definition, after transferring the marketing activity to Lyris. The default values are visible under the General tab of the Mailings record of the target group member.



Notice that the Results field shows that the marketing email message was opened by the recipient target group member. The message reads Lyris Email Opened. The other possible values that are related to Lyris events are Lyris Email Sent, Lyris Email Delivered, and Lyris Email Bounced. These correspond to the state of the email messages that were sent to the contacts by Lyris.

You can manually change the status of the email message in the Mailing record, if for some reason Lyris did not generate the event to reflect the change in status of the email message for a target group member. This way the responsible Rep can maintain the flow of the email marketing activity.

## Viewing Messages and Mailing Lists Created in Lyris

To view the details of the message created in Lyris, see perform the following:

1. Click the link for Lyris Message Id. The Lyris login page displays.
2. Enter your login credentials.

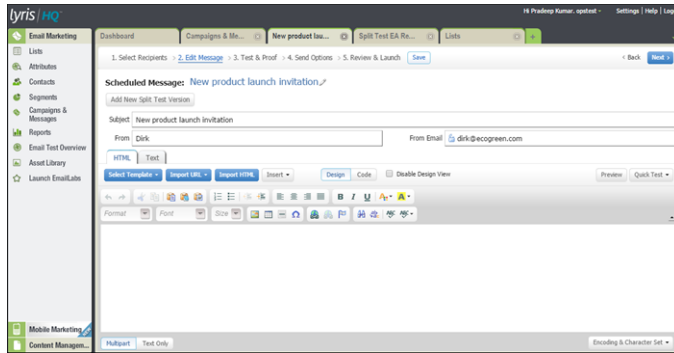
The Lyris Dashboard window displays.

3. Click on the Messages menu in the left panel.

The Messages panel displays.

4. Search for the message using the Message Id displayed in Aurea CRM.
5. Open the message.

You can see that the empty message is created and is open in the Edit Message view.

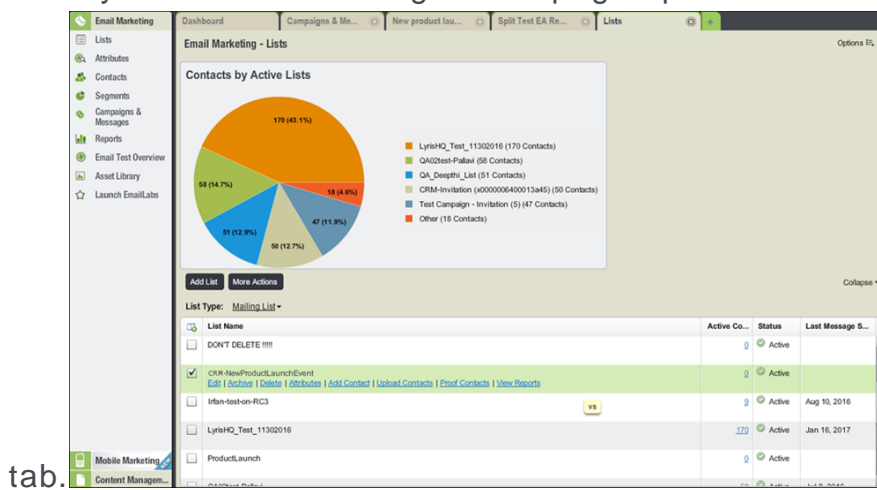


6. You can edit the email.

7. Perform test and proofing and other tasks on email allowed in Lyris. See the Lyris documentation for more information.

To view the details of the mailing list created in Lyris, perform the following:

1. Click the link for Lyris Message Id. The Lyris login page displays.
2. Enter your login credentials.
  - The Lyris Dashboard window displays.
3. Click on the Lists menu in the left panel.
  - The Lyris Email Marketing - Lists page opens in a new



4. Scroll the mailing lists to find the mailing list id created in CRM in the List Name column. See the screenshot above. The mailing list id created in this example is CRM-NewProductLaunchEvent.

**Note:** Search for the mailing list using the Lyris Mailing List name displayed in Aurea CRM.

5. You can click on the different links and update the mailing list as required.

## Transferring a CRM Target group to Lyris HQ

Learn to transfer a CRM target group to Lyris HQ.

Once you have transferred the marketing activity to Lyris, you have to create the target group and execution definition for the marketing activity, for more information see [Adding the Target Group and Execution Definition](#) on page 401. Next, you can transfer the target group to Lyris.

---

**Note:** If you try to transfer a target group for a marketing activity before transferring the marketing activity to Lyris, you are reminded to transfer the marketing activity first. The following message displays: “*Target group transfer cannot be started, because marketing activity has not yet been transferred to Lyris. Please retry after transferring the marketing activity to Lyris.*”

---

Transferring a target group to Lyris involves the following phases:

- 1. Pick CRM Fields**—select the CRM fields listed for the info areas. These fields are added as attributes of a contact that is created in Lyris for each of the target group members transferred to Lyris. The CRM fields are limited to the following infoareas:
  - Company (FI)
  - Contact Person (CP)
  - Person (PE)
  - Person in Company (KP)
- 2. Map CRM fields**—the fields selected in the first step are mapped to equivalent demographics present in Lyris or new demographics can be created and added to the Lyris demographics.
- 3. Create Segment**—associate the target group with a segment in Lyris. This is important because multiple marketing activities can use the same mailing list. And segments enables you to identify the mailing list members in the context of a marketing activity.
- 4. Overview**—this phase displays the number of active target group entities that are eligible to be transferred to Lyris.
- 5. Schedule Transfer**—this phase schedules the transfer and ensures that the transfer process remains active until all the entities are transferred to Lyris. For example, if a connection time out happens during the transfer to Lyris, then CRM would try again at a later time until the transfer is complete.

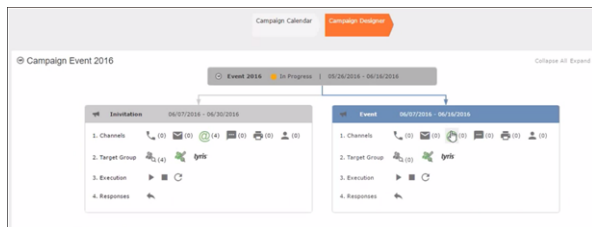


On transferring a target group, an instance for each of the target group member is created in Lyris, using their email contact and demographic details. The target group members are then added as participants to the corresponding mailing list created in Lyris. Aurea CRM ensures the inclusion of the target group members to the segment created in Lyris. You can transfer a target group to Lyris HQ from the campaign designer or from the standard editor for marketing activities

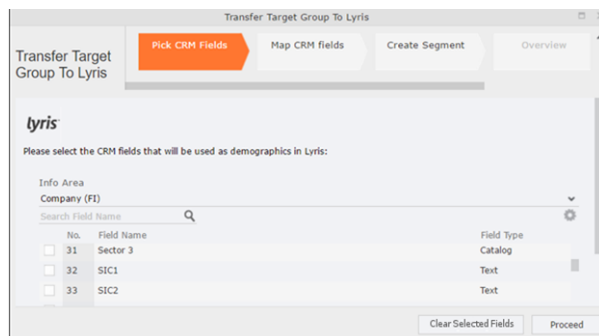
## Transferring from the Campaign designer

To transfer a target group for a marketing activity to CRM designer:

1. Open the marketing activity in the campaign designer.



2. Click in the Target Group row. The Transfer Target Group to Lyris page displays.



3. Click the Pick CRM Fields tab. To select the required CRM fields to be included as attributes for the contacts in the target group, perform the following:
  - a. Select the required Infoarea from the Info Area dropdown list.
  - b. Click the check box to select the required field from each infoarea. You can search for specific fields by typing the field name in the Search Field Name filter. You can sort the displayed fields by name or type by clicking the respective field headers: Field Name or Field Type.
  - c. Repeat the above steps to select the required fields from different infoareas.

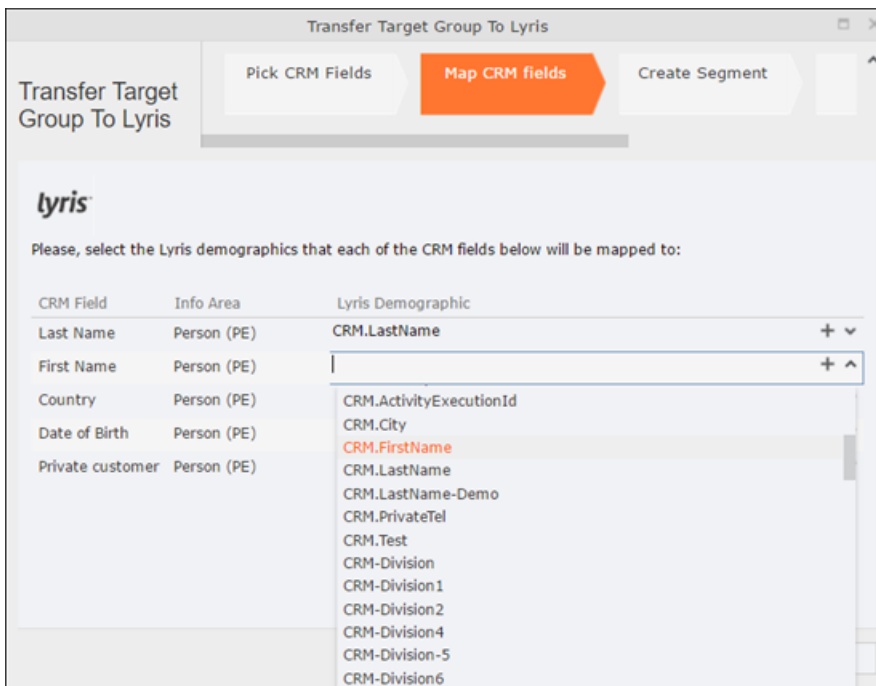
The following fields from the infoareas are not displayed:

- The SeqNo, and StatNo fields.
  - The fields for which the user does not have view rights.
  - The fields containing email addresses. They are automatically transferred.
4. Click Proceed. The Map CRM fields tab gets activated and the following message displays: *Please wait until the mappings between CRM fields and Lyris demographic mappings are loaded...*

Aurea CRM communicates with Lyriss server to retrieve the corresponding Lyriss demographics and displays the mapping table.

To map the CRM fields listed in the table with the retrieved Lyriss demographics, perform the following:

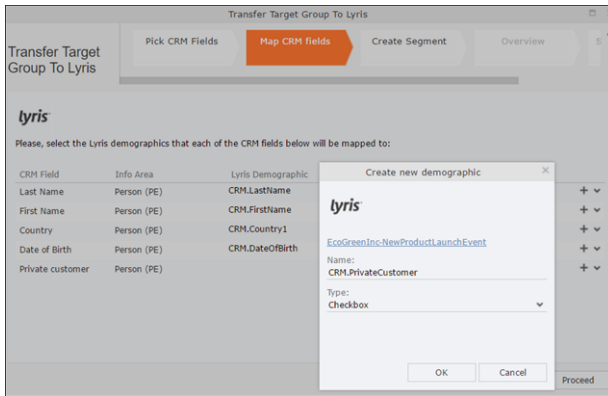
- a. Click in the Lyriss Demographics column to display the list of demographics retrieved from the Lyriss server and select the appropriate demographic for each of the listed CRM field. The demographics listed available are the ones that are compatible with the CRM field based on the CRM Field type. See the screenshot below:



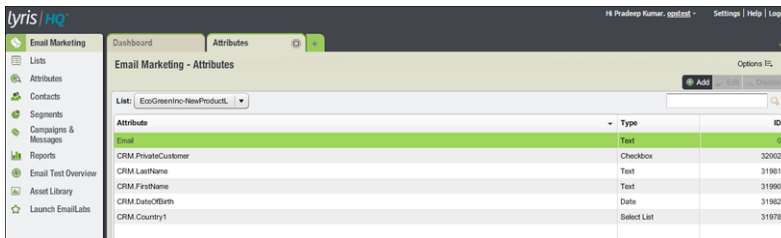
If you cannot find an appropriate Lyriss demographic for the CRM field, you can create a new Lyriss demographic. See the next step.

- b. To create a new demographic, perform the following:
  - a. Click +. The Create new demographic dialog displays.
  - b. Enter a name for the demographic. A suggested name (name of the corresponding CRM field) is displayed for the demographic to be created in the **Name** textbox. You can also specify a name according to your preference.
  - c. Select the type of the demographic from the Type field.

In the screenshot below a new demographic for the field private customer is created. It is named CRM.PrivateCustomer and the type selected is a Checkbox.

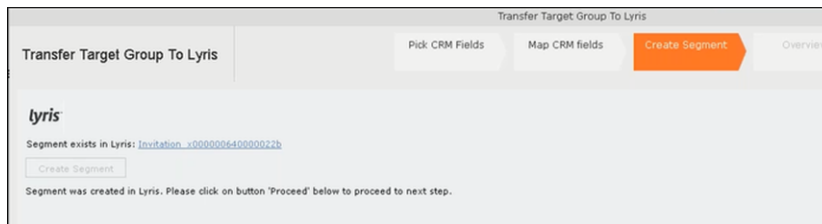


- d. Click OK. The new demographic is created in Lyris.
- e. To view the mapped demographic attributes in Lyris, open Attributes tab and select the required mailing list from the List filter. The Attribute column should show the list of mapped attributes from CRM. See the screenshot below.



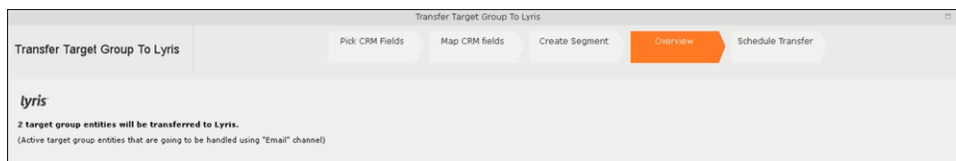
- 5. Click Proceed. The Create Segment tab displays.
- 6. Click Create Segment. A segment for this mailing list is created in Lyris.

The name of the segment created in Lyris is displayed. Clicking the named URL opens the required Lyris segment in a new tab. The name generated is a concatenation of the name and the record id of the marketing activity.



When the segment for this target group is created in Lyris, it generates the Segment generated event. You can view the segment information in the Segment tab of the Edit/View Target group window.

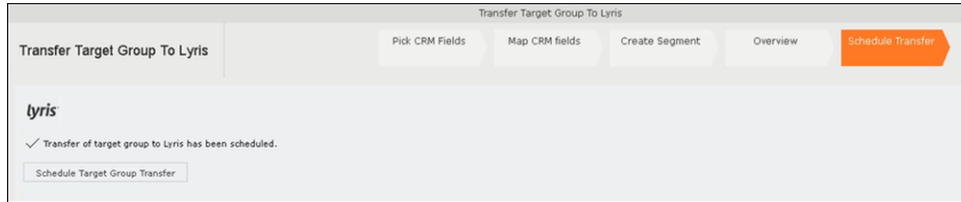
- 7. Click Proceed. The Overview tab displays.



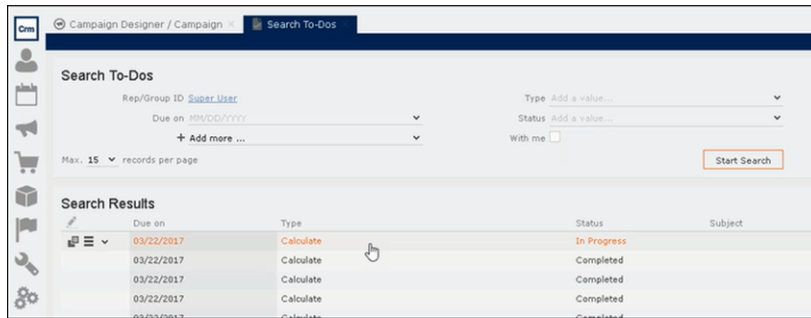
The number of active target group entities that are eligible to be transferred to Lyris is mentioned.

**Note:** If there are no target group entities for the email channel available to be transferred to Lyris, then a message “*No target group entities are eligible to be transferred to Lyris*” is displayed. You should go back and create the target group.

8. Click Proceed. The Schedule Transfer tab displays.
9. Click Schedule Target Group Transfer. A tick mark appears signifying that the transfer process is scheduled.

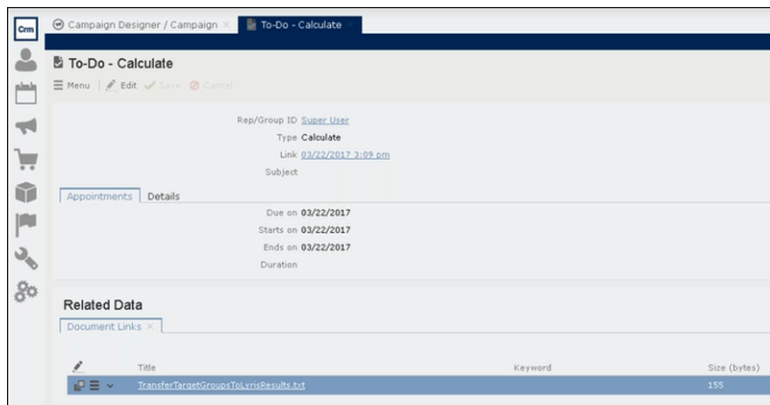


10. To check the status of the transfer, open the Collaboration > To-Dos menu and search for the required scheduled activity. The status of the scheduled transfer should be visible. The following screenshot shows the status of the transfer is In Progress.



The transfer status changes to Completed, once the target group is transferred successfully.

11. To view the details of the transfer process, open the scheduled entity from the To-Do search list. The Related Data tab contains a link to a text file that contains information about the target group transfer process.



Open the document to find the information on the transfer process.

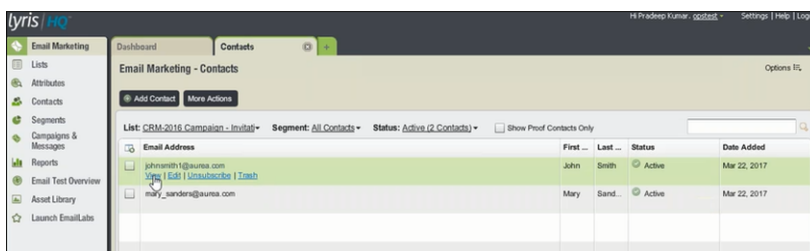
```

TransferTargetGroupsToLyrismResults (16).txt - Notepad
File Edit Format View Help
2017.03.22 16:09:40 | Result: Success
2017.03.22 16:09:40 | Successfully transferred in chunk: 2
2017.03.22 16:09:40 | Not transferred in chunk: 0
2017.03.22 16:09:40 | Target groups in chunk: 2
2017.03.22 16:09:40 | Chunk size: 10
2017.03.22 16:09:40 | Target groups left to transfer: 2
2017.03.22 16:09:40 | ErrorMessage:
2017.03.22 16:09:40 | Errors count: 0

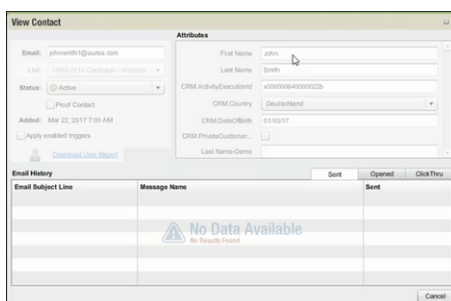
```

12. You can check the contacts created in Lyris for the transferred target group members. To list the contacts in Lyris and view the contact details created, perform the following:

- a. Open the Contacts tab and select the mailing list from the List filter. The contacts created for his mailing list is displayed.



- b. Click View to open the details of the contact generated. The View Contacts dialog displays.



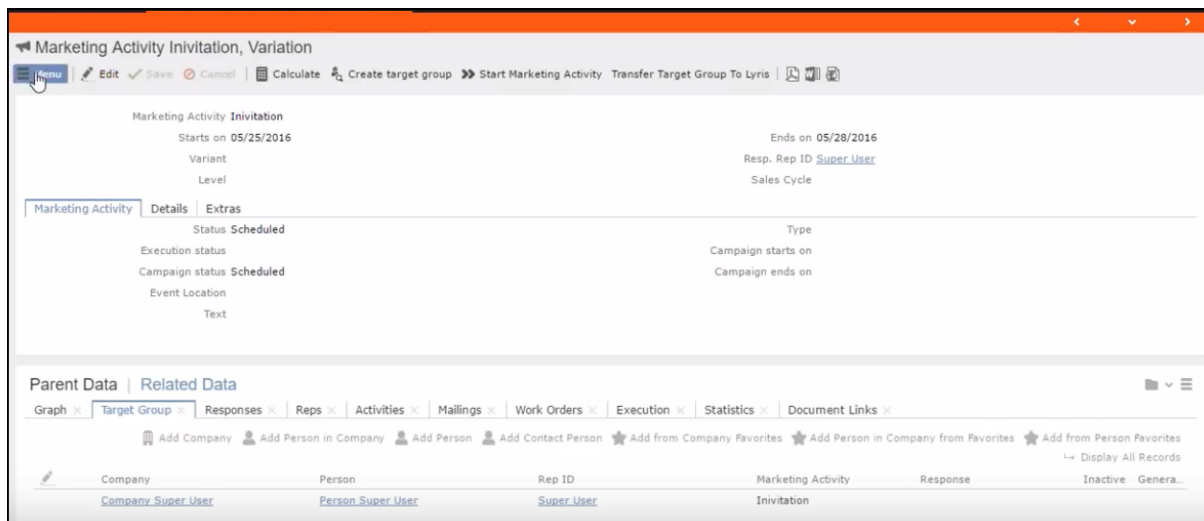
The field values of the mapped fields are transferred from CRM and populated in the corresponding mapped demographics in Lyris

## Transferring from the Standard Editor

If you prefer to use the standard editor for creating marketing activities instead of the Campaign Designer, you can still transfer a marketing activity to Lyris from the standard editor.

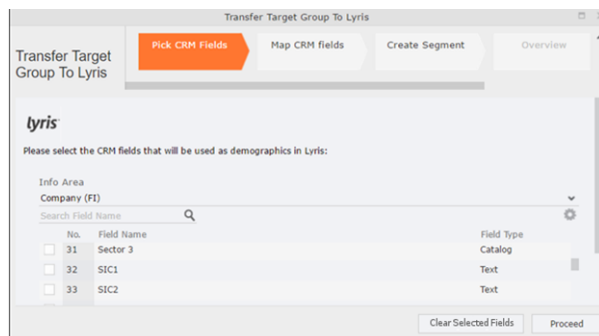
To transfer a marketing activity from the standard editor to Lyris, perform the following:

1. Select Marketing > Marketing Activities from the CRM menu. The Search Marketing activities page displays.
2. Enter the search filters and click **Start Search**. The search results list displays.
3. Open the context menu of the required marketing activity from the result list and select **Tab View** or **Tree View**. The **Marketing Activity window** displays.



**Note:** Double clicking a marketing activity from the result list opens the marketing activity in the campaign designer.

4. Select **Related Data > Target Group** tab.
5. If there are no items listed in the Target Group Tab, click on the **Create Target Group** link.
6. Once your target group is defined, click the Transfer Target Group to Lyris link. The Transfer Target Group to Lyris page displays.



7. The rest of the steps to transfer the target to Lyris from the standard editor is similar to the way the target group is transferred from the Campaign Designer. Perform the steps 3 to 12 as described in the topic [Transferring from the Campaign designer](#) on page 445.

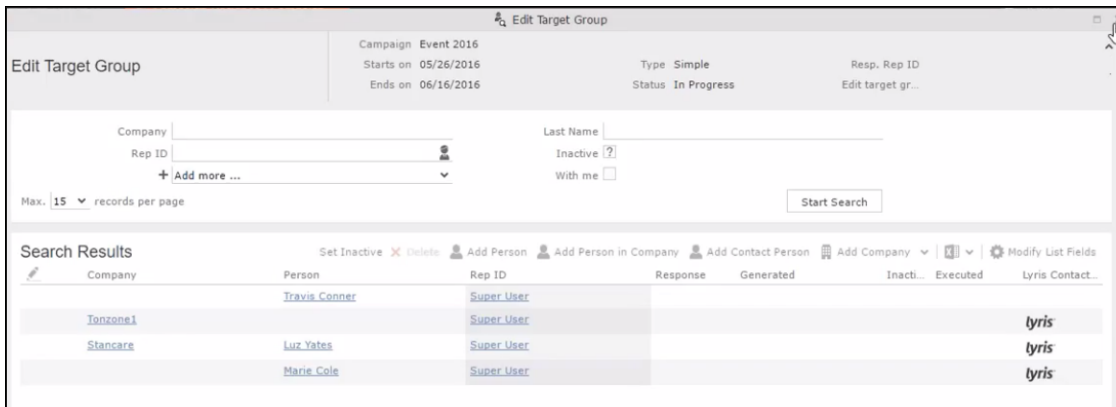
The remaining sections in this chapter talk about the effect of making changes to the target group in Aurea CRM and the corresponding changes in Lyris.

### Adding or Deleting member(s) from a Target group

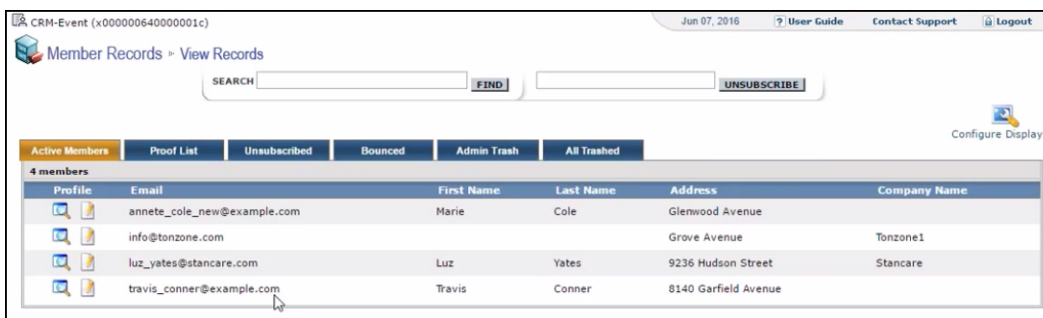
When you add a member to or delete a member from a target group that is already transferred to Lyris, a corresponding member entity is added or deleted from the corresponding mailing list on Lyris.

### Adding a member to the target group

In the screenshots below, a fourth member is added to the target group and the corresponding change in Lyris is shown.



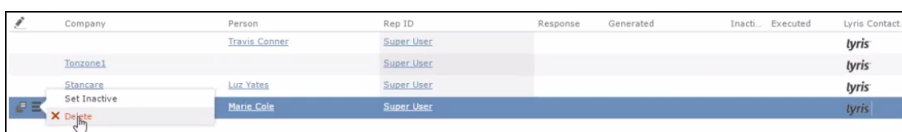
As visible in the screenshot above, a new member (Travis Conners) is added to the target group. The user is automatically added to the corresponding mailing list participants on Lyris, as shown in the screenshot below.



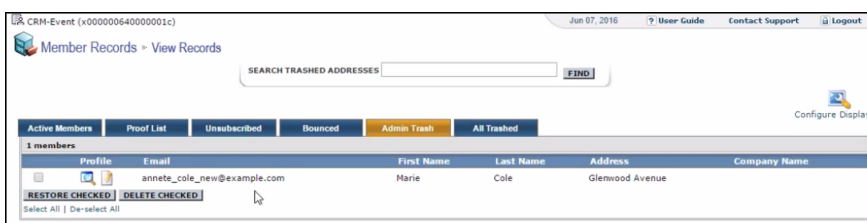
As you can see the new person is added to the list of active participants in the corresponding mailing list.

### Deleting a member from the target group

If you delete a member from the target group on Aurea CRM, the corresponding mailing list member in Lyris is moved from **Active members** to the **Admin Trash** list.



Member **Marie Cole** is deleted from the target group.

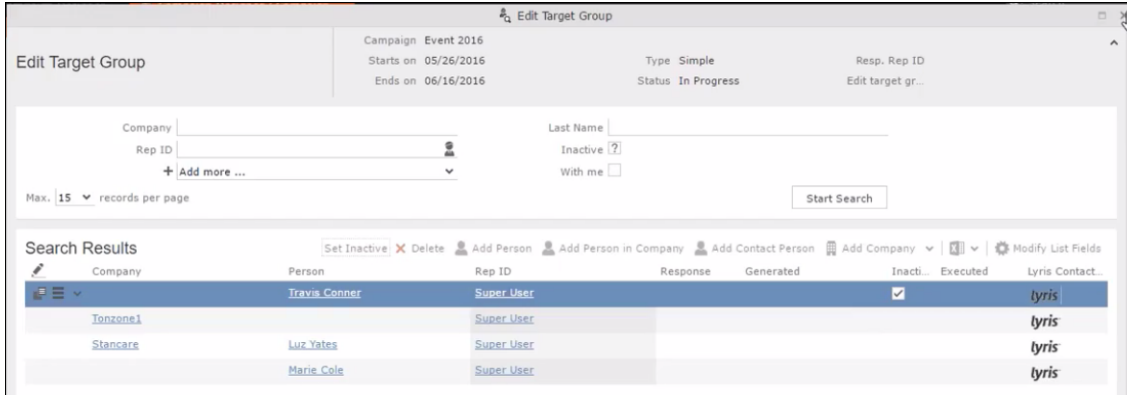


Member Marie Cole is moved from **Active Members** list to **Admin Trash** list.

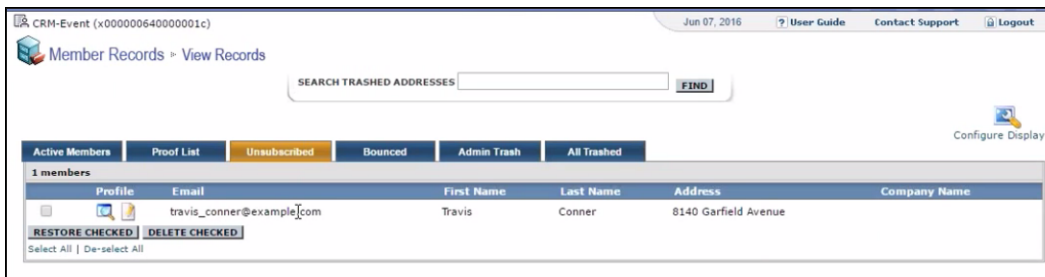


### Activating or deactivating a target group entity

Deactivating a target group member in Aurea CRM, moves the corresponding member record to the unsubscribed list in Lyris. The following screenshot shows the person entity (Travis Conners) deactivated (**Inactive**) in **Edit Target Group** window.



The corresponding entity is now moved to the unsubscribed list of member records in Lyris.

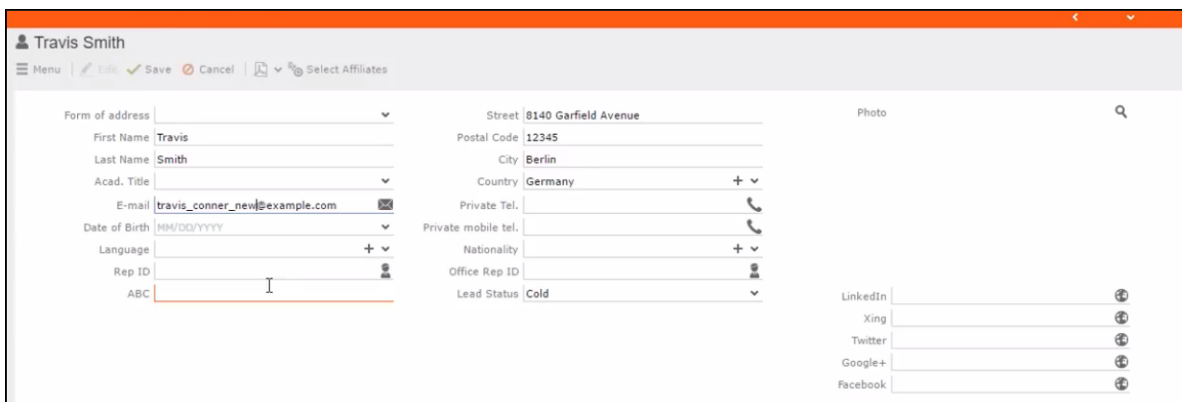


Similarly, activating an inactive member in the **Edit Target Group** window, moves the member record in Lyris from the **Unsubscribed** list to the **Active Members** list.

### Changing the attributes of a target group entity

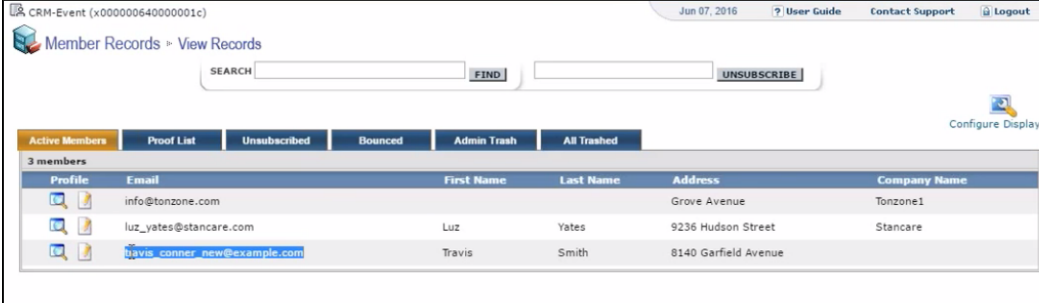
If the attribute of a target group member already transferred to Lyris is changed, the changes are automatically transferred to Lyris.

In the following screenshots the last name of person entity Conner is changed to Smith, and his email id is changed to the same is reflected in Lyris.





The corresponding changes to the member record in Lyris is shown in the screenshot below.

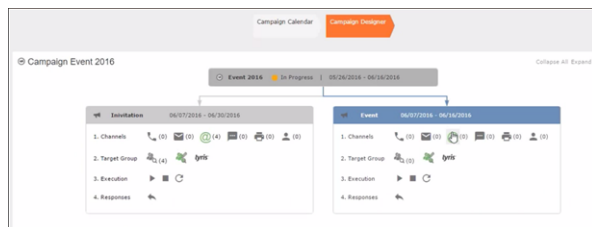


Profile	Email	First Name	Last Name	Address	Company Name
	info@tonzone.com			Grove Avenue	Tonzone1
	luz_yates@stancare.com	Luz	Yates	9236 Hudson Street	Stancare
	h.yvis_conner_new@example.com	Travis	Smith	8140 Garfield Avenue	

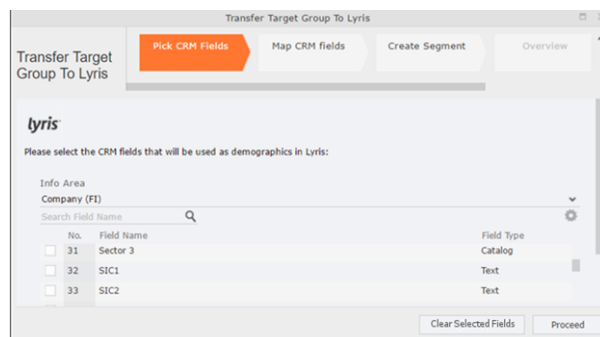
## Transferring from the Campaign designer

To transfer a target group for a marketing activity to CRM designer:

1. Open the marketing activity in the campaign designer.



2. Click in the Target Group row. The Transfer Target Group to Lyris page displays.



3. Click the Pick CRM Fields tab. To select the required CRM fields to be included as attributes for the contacts in the target group, perform the following:
  - a. Select the required Infoarea from the Info Area dropdown list.
  - b. Click the check box to select the required field from each infoarea. You can search for specific fields by typing the field name in the Search Field Name filter. You can sort the displayed fields by name or type by clicking the respective field headers: Field Name or Field Type.
  - c. Repeat the above steps to select the required fields from different infoareas.

The following fields from the infoareas are not displayed:

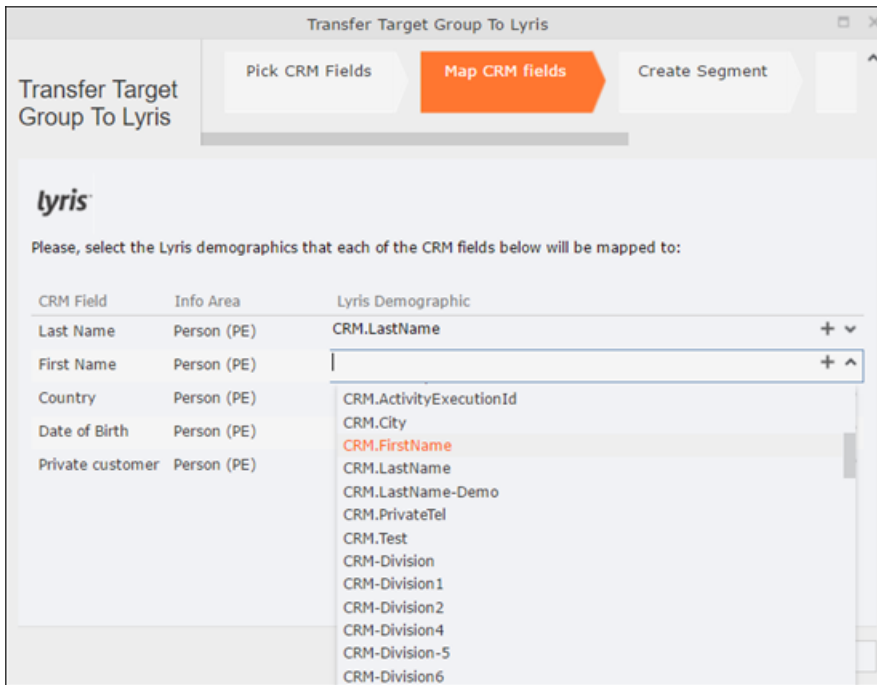
- The SeqNo, and StatNo fields.
- The fields for which the user does not have view rights.
- The fields containing email addresses. They are automatically transferred.

4. Click Proceed. The Map CRM fields tab gets activated and the following message displays: *Please wait until the mappings between CRM fields and Lyris demographic mappings are loaded...*

Aurea CRM communicates with Lyris server to retrieve the corresponding Lyris demographics and displays the mapping table.

To map the CRM fields listed in the table with the retrieved Lyris demographics, perform the following:

- Click in the Lyris Demographics column to display the list of demographics retrieved from the Lyris server and select the appropriate demographic for each of the listed CRM field. The demographics listed available are the ones that are compatible with the CRM field based on the CRM Field type. See the screenshot below:

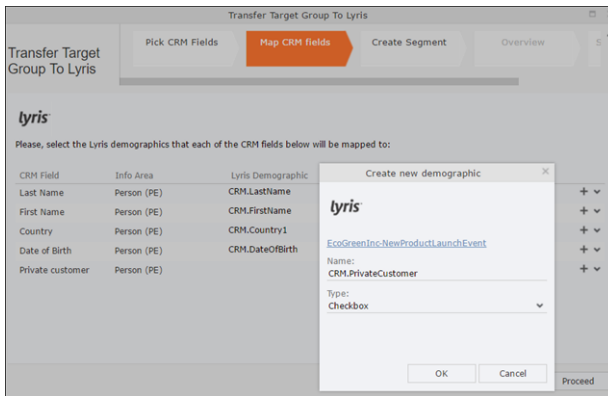


If you cannot find an appropriate Lyris demographic for the CRM field, you can create a new Lyris demographic. See the next step.

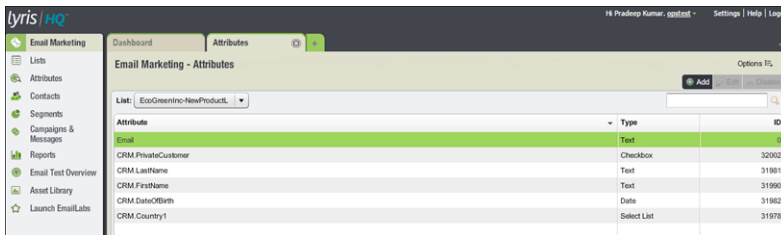
- To create a new demographic, perform the following:
  - Click +. The Create new demographic dialog displays.
  - Enter a name for the demographic. A suggested name (name of the corresponding CRM field) is displayed for the demographic to be created in the **Name** textbox. You can also specify a name according to your preference.

- c. Select the type of the demographic from the Type field.

In the screenshot below a new demographic for the field private customer is created. It is named CRM.PrivateCustomer and the type selected is a Checkbox.

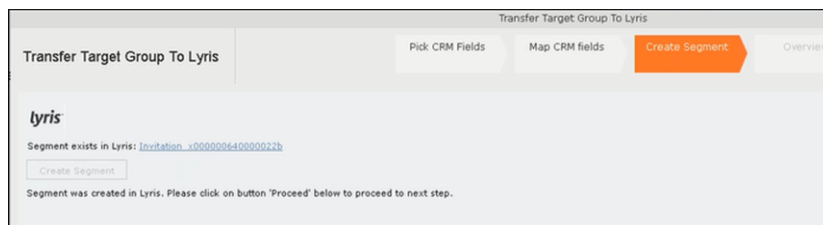


- d. Click OK. The new demographic is created in Lyris.
- e. To view the mapped demographic attributes in Lyris, open Attributes tab and select the required mailing list from the List filter. The Attribute column should show the list of mapped attributes from CRM. See the screenshot below.



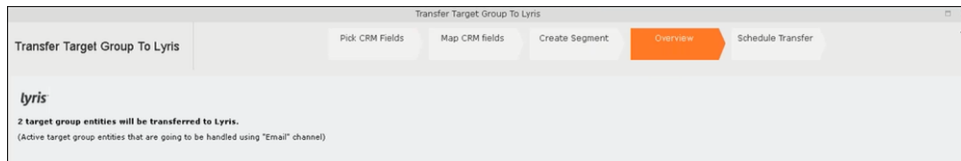
5. Click Proceed. The Create Segment tab displays.
6. Click Create Segment. A segment for this mailing list is created in Lyris.

The name of the segment created in Lyris is displayed. Clicking the named URL opens the required Lyris segment in a new tab. The name generated is a concatenation of the name and the record id of the marketing activity.



When the segment for this target group is created in Lyris, it generates the Segment generated event. You can view the segment information in the Segment tab of the Edit/View Target group window.

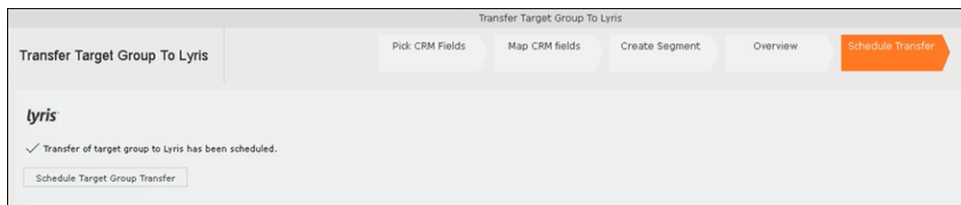
7. Click Proceed. The Overview tab displays.



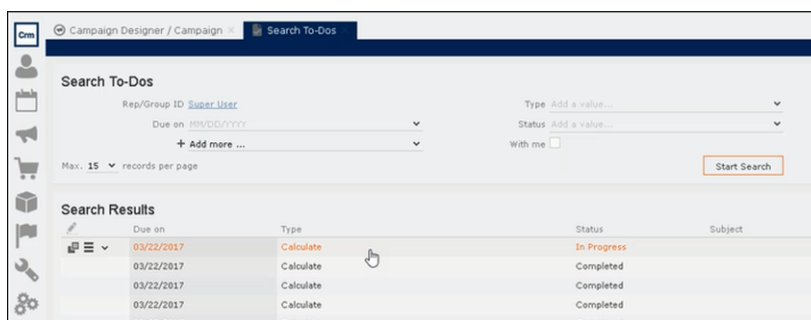
The number of active target group entities that are eligible to be transferred to Lyris is mentioned.

**Note:** If there are no target group entities for the email channel available to be transferred to Lyris, then a message “*No target group entities are eligible to be transferred to Lyris*” is displayed. You should go back and create the target group.

8. Click Proceed. The Schedule Transfer tab displays.
9. Click Schedule Target Group Transfer. A tick mark appears signifying that the transfer process is scheduled.

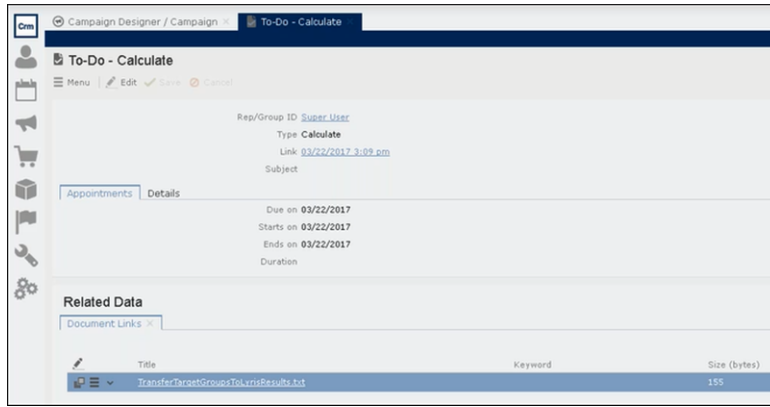


10. To check the status of the transfer, open the Collaboration > To-Dos menu and search for the required scheduled activity. The status of the scheduled transfer should be visible. The following screenshot shows the status of the transfer is In Progress.

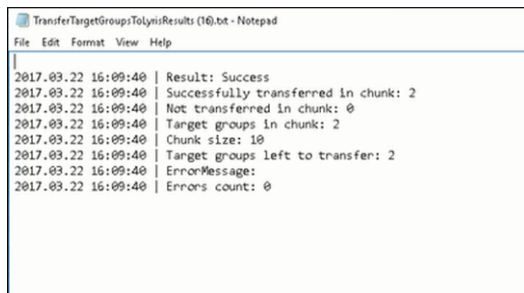


The transfer status changes to Completed, once the target group is transferred successfully.

11. To view the details of the transfer process, open the scheduled entity from the To-Do search list. The Related Data tab contains a link to a text file that contains information about the target group transfer process.

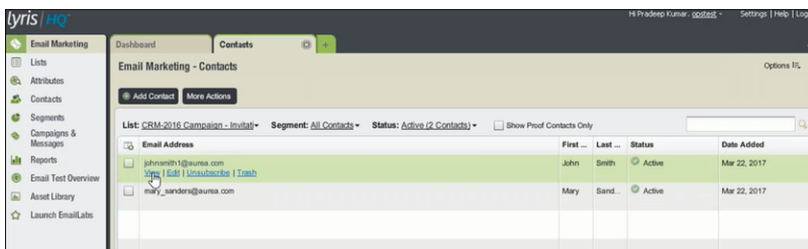


Open the document to find the information on the transfer process.

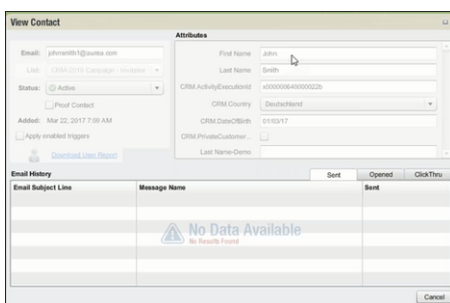


12. You can check the contacts created in Lyris for the transferred target group members. To list the contacts in Lyris and view the contact details created, perform the following:

a. Open the Contacts tab and select the mailing list from the List filter. The contacts created for his mailing list is displayed.



b. Click View to open the details of the contact generated. The View Contacts dialog displays.



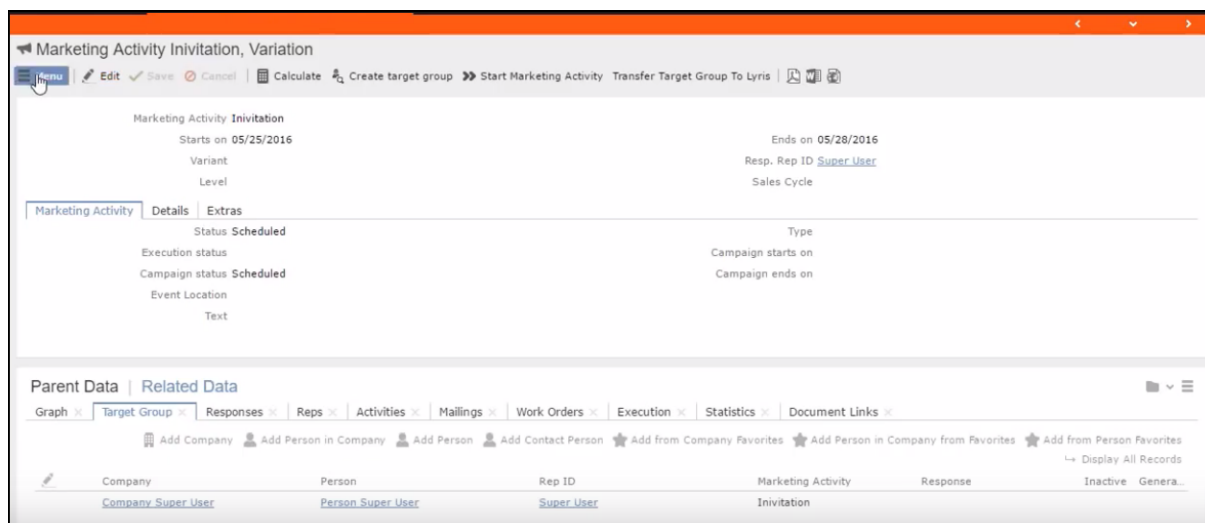
The field values of the mapped fields are transferred from CRM and populated in the corresponding mapped demographics in Lyrus

## Transferring from the Standard Editor

If you prefer to use the standard editor for creating marketing activities instead of the Campaign Designer, you can still transfer a marketing activity to Lyrus from the standard editor.

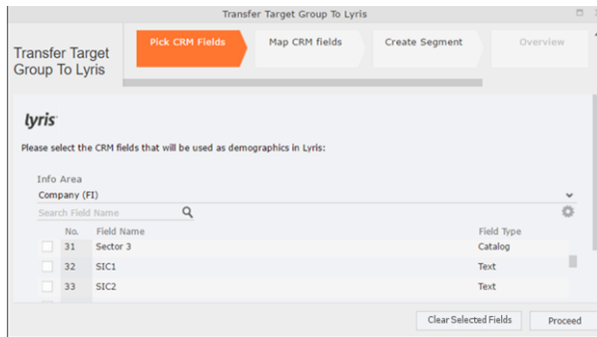
To transfer a marketing activity from the standard editor to Lyrus, perform the following:

1. Select Marketing > Marketing Activities from the CRM menu. The Search Marketing activities page displays.
2. Enter the search filters and click **Start Search**. The search results list displays.
3. Open the context menu of the required marketing activity from the result list and select **Tab View** or **Tree View**. The **Marketing Activity window** displays.



**Note:** Double clicking a marketing activity from the result list opens the marketing activity in the campaign designer.

4. Select **Related Data > Target Group** tab.
5. If there are no items listed in the Target Group Tab, click on the **Create Target Group** link.
6. Once your target group is defined, click the Transfer Target Group to Lyrus link. The Transfer Target Group to Lyrus page displays.



7. The rest of the steps to transfer the target to Lyris from the standard editor is similar to the way the target group is transferred from the Campaign Designer. Perform the steps 3 to 12 as described in the topic [Transferring from the Campaign designer](#) on page 445.

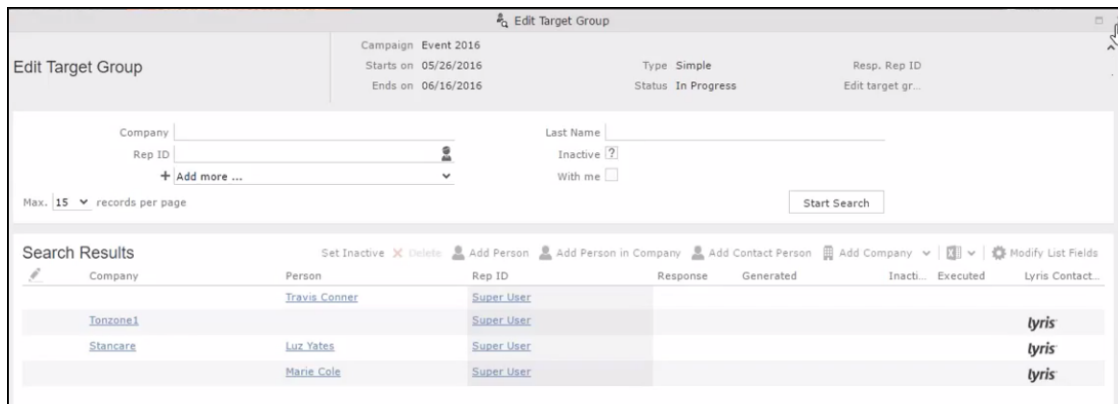
The remaining sections in this chapter talk about the effect of making changes to the target group in Aurea CRM and the corresponding changes in Lyris.

## Adding or Deleting member(s) from a Target group

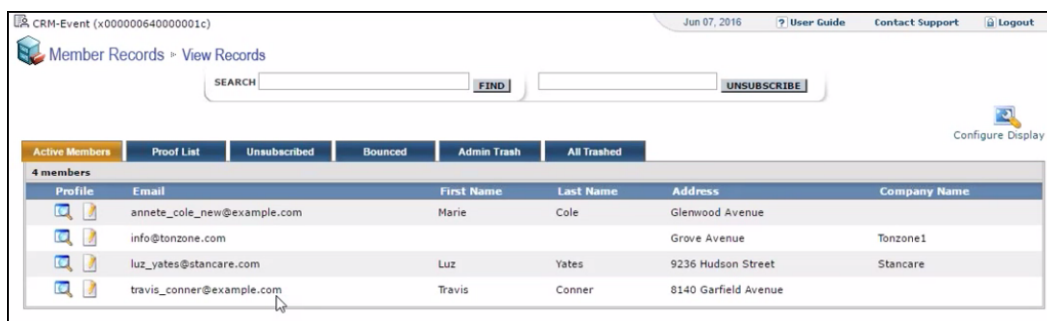
When you add a member to or delete a member from a target group that is already transferred to Lyris, a corresponding member entity is added or deleted from the corresponding mailing list on Lyris.

### Adding a member to the target group

In the screenshots below, a fourth member is added to the target group and the corresponding change in Lyris is shown.



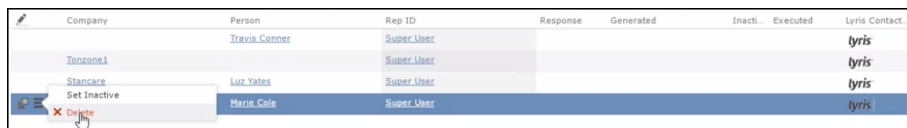
As visible in the screenshot above, a new member (Travis Connors) is added to the target group. The user is automatically added to the corresponding mailing list participants on Lyris, as shown in the screenshot below.



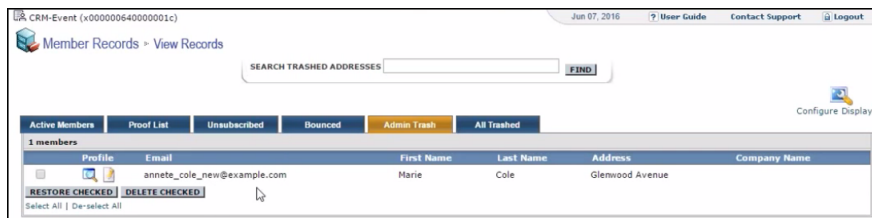
As you can see the new person is added to the list of active participants in the corresponding mailing list.

### Deleting a member from the target group

If you delete a member from the target group on Aurea CRM, the corresponding mailing list member in Lyris is moved from **Active members** to the **Admin Trash** list.



Member **Marie Cole** is deleted from the target group.

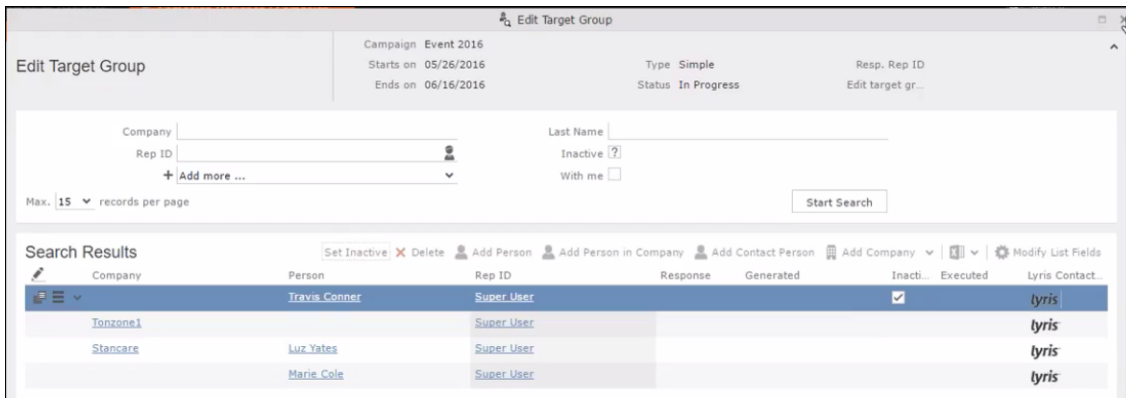


Member Marie Cole is moved from **Active Members** list to **Admin Trash** list.

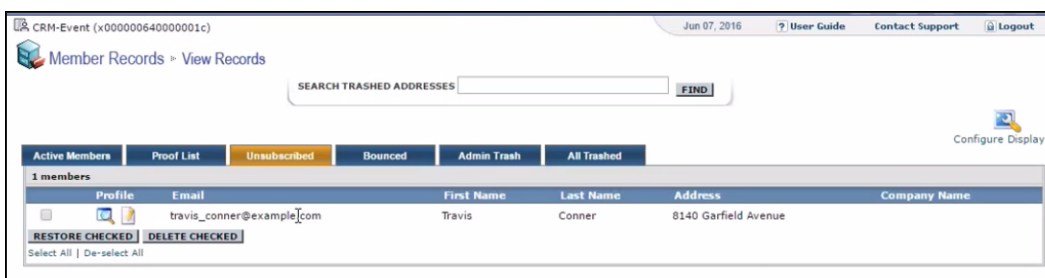
### Activating or deactivating a target group entity

Deactivating a target group member in Aurea CRM, moves the corresponding member record to the unsubscribed list in Lyris. The following screenshot shows the person entity (Travis Connors) deactivated (**Inactive**) in **Edit Target Group** window.





The corresponding entity is now moved to the unsubscribed list of member records in Lyris.

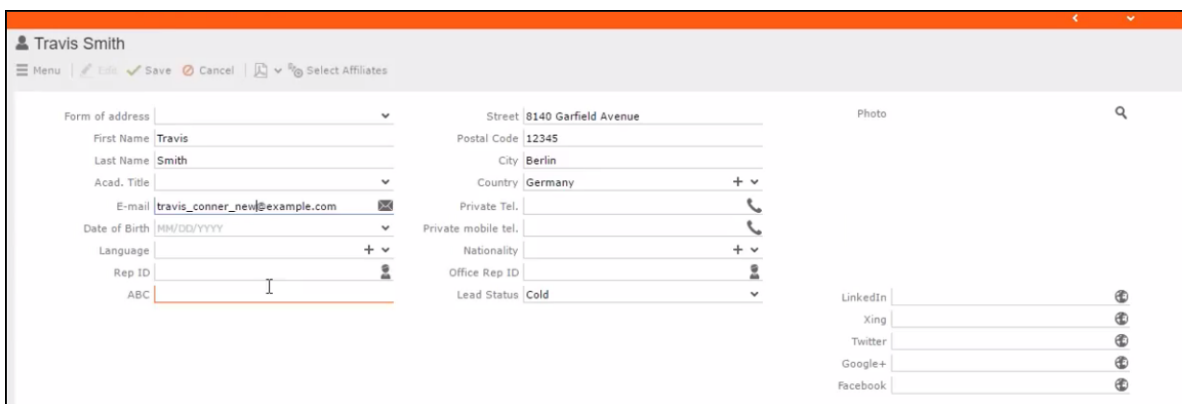


Similarly, activating an inactive member in the **Edit Target Group** window, moves the member record in Lyris from the **Unsubscribed** list to the **Active Members** list.

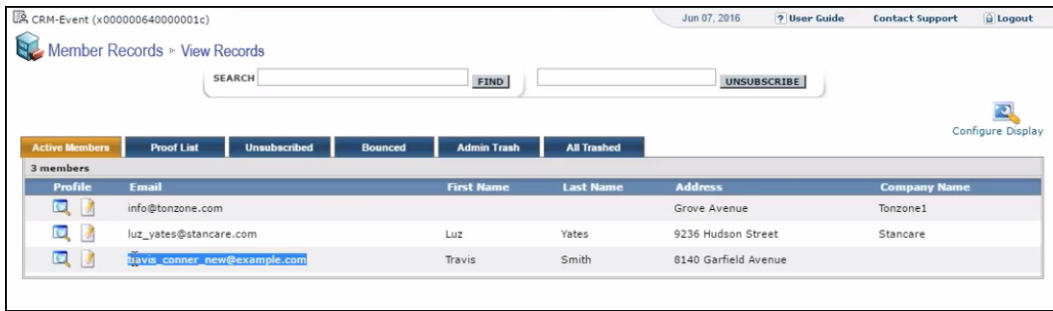
## Changing the attributes of a target group entity

If the attribute of a target group member already transferred to Lyris is changed, the changes are automatically transferred to Lyris.

In the following screenshots the last name of person entity Conner is changed to Smith, and his email id is changed to the same is reflected in Lyris.



The corresponding changes to the member record in Lyris is shown in the screenshot below.



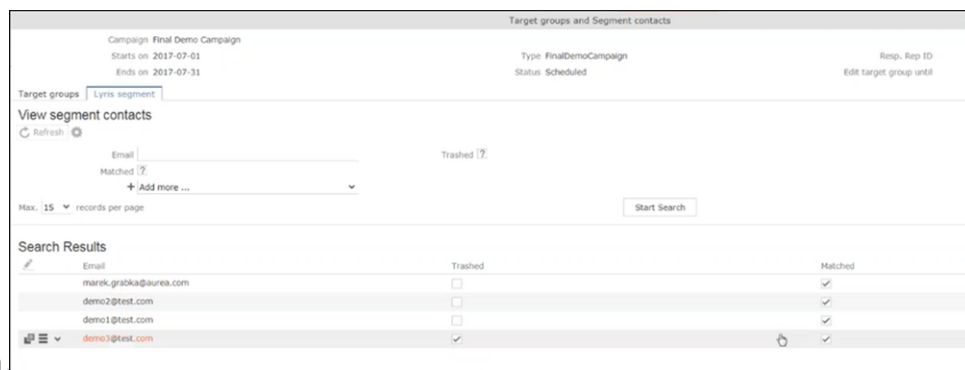
## Viewing/Editing the Lyris Segment Details

When a target group is transferred to Lyris a segment definition is created in Lyris. It contains the list of contacts that correspond to the target group members of the marketing activity in Aurea CRM. When the segment is generated in Lyris, the actual email messages are created and sent to each of the target group members. To use an analogy, a segment is like a database query and segment generation is similar to executing the database query that generates the result set of records. The list of contacts for a segment can be edited and updated in Lyris.

When Lyris generates a segment, Aurea CRM on receiving the segment generation event stores the event data in the Segment Compact (EG) infoarea records.

To view the Segment information in Aurea CRM, perform the following:

1. Open the required Campaign containing the marketing activity container.
2. Click the Edit Marketing activity's target group ( ) icon. The Target groups and Segment contacts page displays.
3. Click the Lyris Segment tab.



4. Click Start Search. The list of contacts in the segment generated in Lyris are displayed in the Search Results. If there are no results displayed for a segment that is generated in Lyris, click the Refresh button and the segment contacts are fetched from Lyris.

If the state of a contact was set to Trashed in Lyris, the checkbox in the Trashed column is checked. The checkbox in the Matched column is checked when the email address of a target group member for the marketing activity in Aurea CRM, matches the Contacts email address.

5. Double click a Contact listed in the search result list. The EG info area record for the contact displays. The record is read only and cannot be edited.

Note that the target group that contains the matching member with the same email id is displayed in the Related Data section. Also, these records are deleted and recreated every time the Refresh button is clicked in the Target groups and Segment contacts page.

## **Lyris Event notification – FSI only**

This topic explains the Lyris Event notifications.

Aurea Campaign Manager sends the following event notifications when the Contact status of target group member changes:

- Trashed - A target group member is set to Trashed state in the Aurea Campaign Manager.
- Bounced – A target group member is set to Bounced state in the Aurea Campaign Manager.
- Unsubscribed – A target group member unsubscribes in the Aurea Campaign Manager.
- Active - A target group member is set to Active state in the Aurea Campaign Manager.

Aurea Campaign Manager sends the following event notifications on the status of the Email messages for a marketing activity:

- Email Sent – When Aurea Campaign Manager sends the marketing email message to a target group member.
- Email Delivered – When Aurea Campaign Manager delivers marketing activity email message to the inbox of a target group member.
- Email Opened – When the target group member opens the email message for the marketing activity.
- Email Bounced – When the email for a target group member could not be delivered for some reason.

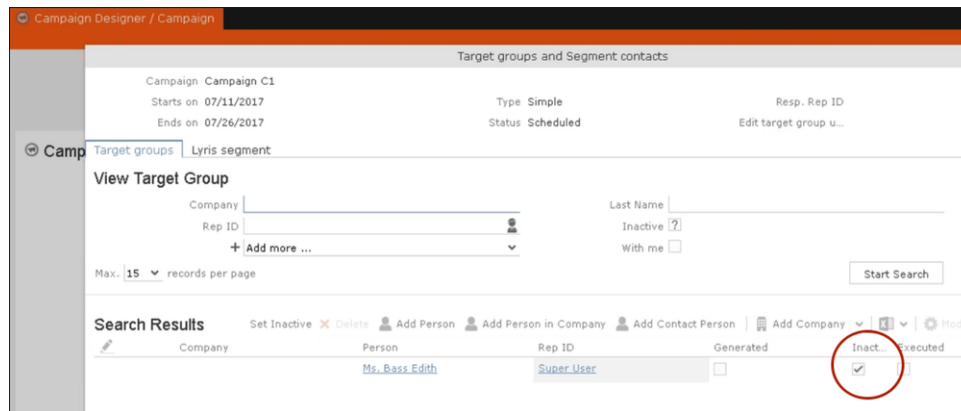
Other event notifications from Aurea Campaign Manager:

- URL Click Event – When a user clicks on a response URL link in a marketing activity email message.
- Update Boolean Field – When the value of a property (demographic) of type Boolean (checkbox), of a target group member in the Aurea Campaign Manager is updated.
- Update Date Field – When the value of a property (demographic), of type Date, of a target group member in the Aurea Campaign Manager is updated. For example, the **Date of Birth** value of a target group member in the Aurea Campaign Manager is updated.
- Update Text Field – When the value of a property (demographic), of type text or text area, of a target group member in the Aurea Campaign Manager is updated. For example, the **First Name** value of a contact in the Aurea Campaign Manager is updated.
- Update Catalog field – When the value of a property (demographic), of type Select List, of a target group member in the Aurea Campaign Manager is updated. For example, the **Country** field of a target group member in the Aurea Campaign Manager is updated.

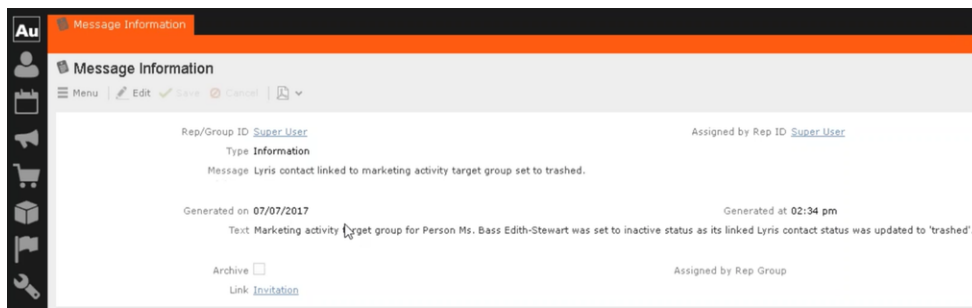
The following topics describe how Aurea CRM handles each of the different event notifications:

### Handling Contact Trashed event

When a target group member’s status is set to Trashed in Lyris, a notification message is generated for the responsible Rep of the marketing activity. In the Edit/View target group page, the target group member is set to Inactive, and the checkbox is selected. See the screenshot below:



A pop up in the notification area indicates a new event message. A link to the marketing activity is provided in the Message Information page. The notification contains information about the CRM target group member that was set to Trashed status in the Aurea Campaign Manager. See the screenshot below:



## Handling Contact Active event

When an inactive (or trashed) target group member is set to Active in the Aurea Campaign Manager, a notification message is sent to the responsible rep of the marketing activity. In the Edit/View target group page, the target group member is set to active and the Inactive checkbox is unselected.

The Message Information page, contains a link to the marketing activity, it also contains the reasons for setting the target group to active, and the name of the target group member set to Active in the Aurea Campaign Manager.

## Handling Contact Bounced event

When Aurea Campaign Manager changes the status of a contact to bounced, the event is received by Aurea CRM and it executes a predefined named trigger. You can define the trigger logic based on your business requirements. For example, a trigger can be executed to set the inactive field to true for bounced target group member.

To set up the required trigger, contact your Aurea CRM System administrator.

## Handling Contact Unsubscribed Event

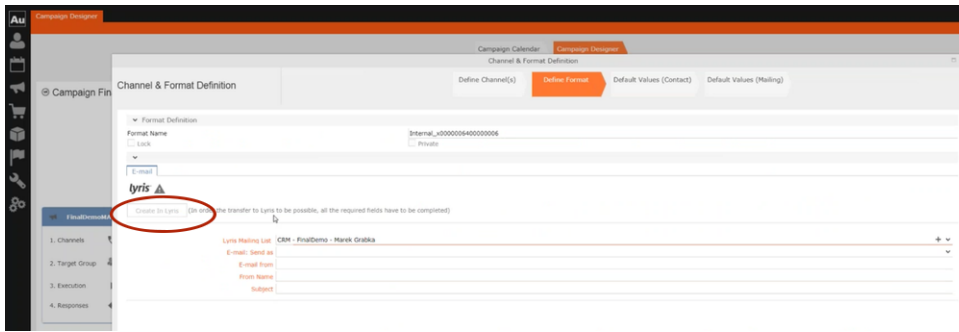
When Lyris changes the status of a contact to Unsubscribed, the event is received by Aurea CRM and it executes a predefined named trigger. You can define the trigger logic based on your business requirements.

To set up the required trigger, contact your Aurea CRM System administrator.

## Handling Email Marketing Message Deleted Event

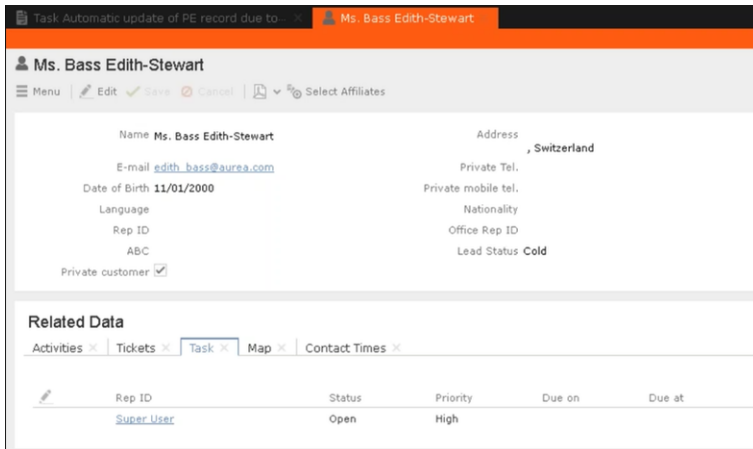
When an Email marketing message is deleted from Lyris, the event is received by Aurea CRM and it executes a predefined named trigger. You can define the trigger logic based on your business requirements. For example, a trigger can be executed to clear the Email properties in Aurea CRM. To set up the required trigger, contact your Aurea CRM System administrator.

A notification message informs the responsible Rep for the marketing activity of the message deletion in the Aurea Campaign Manager. Also, the Create in Lyris button is deactivated and visible in the Define Format tab of the Channel and Format definition page of the marketing activity, as shown in the screenshot below. If required, you can define and save the message format again, before saving it to Lyris.



## Handling events with faulty data

Sometimes information received from Aurea Campaign Manager might be faulty and Aurea CRM is unable to perform further processing. Such events are presented as tasks to the Rep responsible for the corresponding marketing activity whose event data could not be processed by Aurea CRM. This enables the Rep to identify the issue and update the proper records manually. All the tasks set up for a Rep can be viewed in the Person, Person Company info areas. In the screenshot below, the Task tab shows all the tasks assigned to the Rep in the Related Data section.



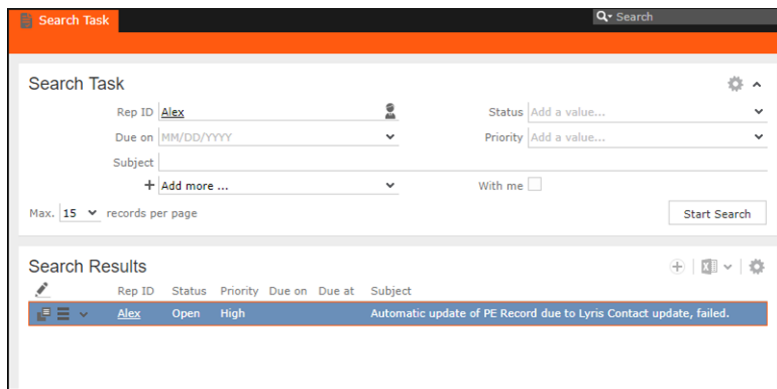
Events generated with invalid data also generate appropriate log messages that are useful in understanding the type of invalid data and provide meaningful clues about the fault. Some of the invalid data scenarios are listed below:

- Invalid Message ID
- Invalid Mailing list ID
- Click events generated by recipients who are not members of Aurea CRM.

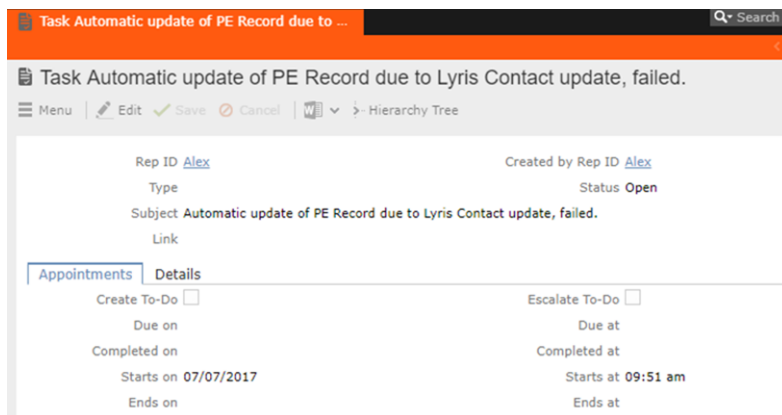
To illustrate this lets consider a scenario where the contact’s demographics property country is updated. This demographics property in the Aurea Campaign Manager is mapped to the field land and its value needs to be selected from a catalog. The Contact’s information cannot be updated by Aurea CRM in the Person (PE) info area record, if the new country value is not present in the CRM catalog.

To handle such events, perform the following steps:

1. Select Collaboration () à Tasks from the main menu. The Search Task page opens.
2. Set the required filter criteria and click Start Search. The search results display.

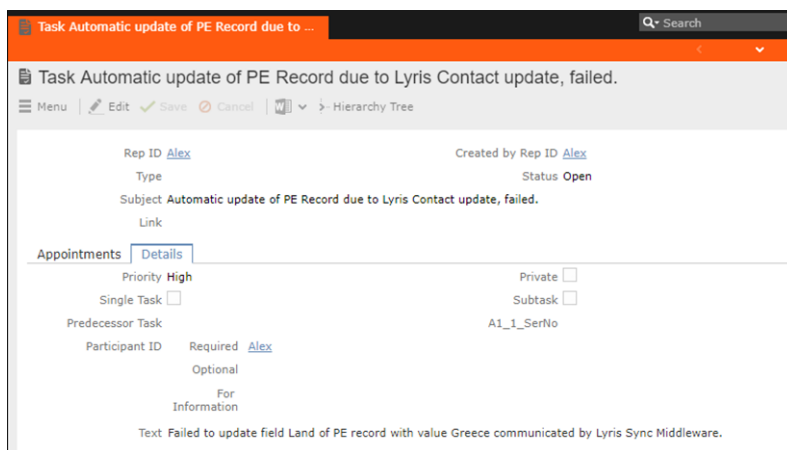


3. Double click on the task. The task page displays.



The Subject field provides the information about the failed attempt to update the Person record.

4. Click the Details tab. You can find more information about the reasons for the failed activity. Which should inform you about the subsequent actions to take.

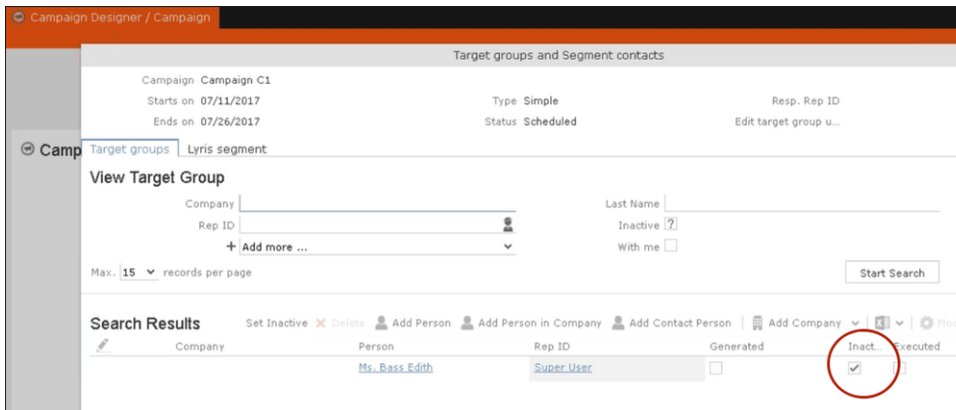


In the screenshot above, from the information provided in the Text field you can conclude that the catalog needs to be updated with the new country name. And then the person record needs to be updated with the new country field.

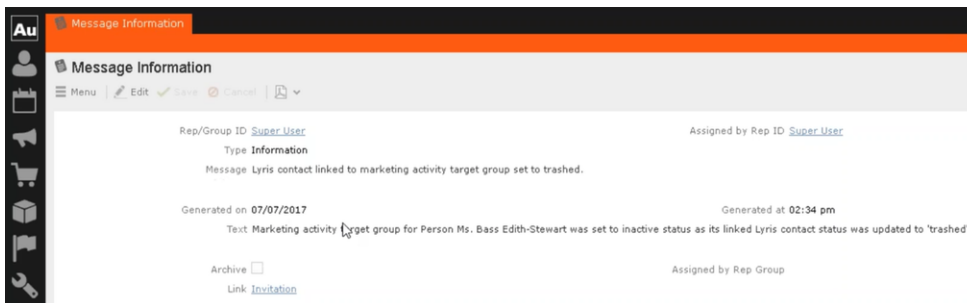


## Handling Contact Trashed event

When a target group member's status is set to Trashed in Lyris, a notification message is generated for the responsible Rep of the marketing activity. In the Edit/View target group page, the target group member is set to Inactive, and the checkbox is selected. See the screenshot below:



A pop up in the notification area indicates a new event message. A link to the marketing activity is provided in the Message Information page. The notification contains information about the CRM target group member that was set to Trashed status in the Aurea Campaign Manager. See the screenshot below:



## Handling Contact Active event

When an inactive (or trashed) target group member is set to Active in the Aurea Campaign Manager, a notification message is sent to the responsible rep of the marketing activity. In the Edit/View target group page, the target group member is set to active and the Inactive checkbox is unselected.

The Message Information page, contains a link to the marketing activity, it also contains the reasons for setting the target group to active, and the name of the target group member set to Active in the Aurea Campaign Manager.



## Handling Contact Bounced event

When Aurea Campaign Manager changes the status of a contact to bounced, the event is received by Aurea CRM and it executes a predefined named trigger. You can define the trigger logic based on your business requirements. For example, a trigger can be executed to set the inactive field to true for bounced target group member. To set up the required trigger, contact your Aurea CRM System administrator.

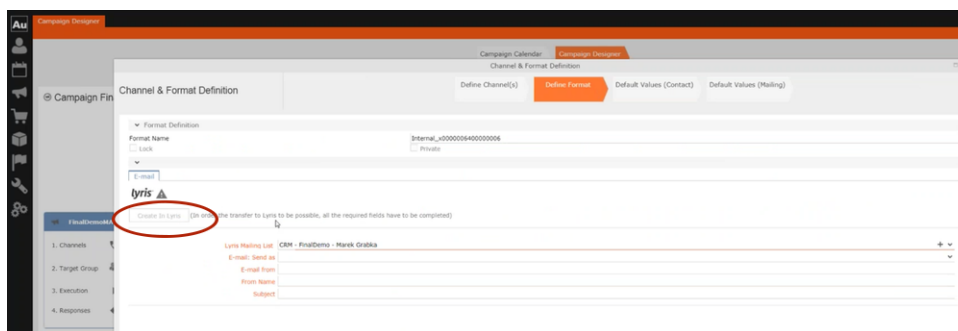
## Handling Contact Unsubscribed Event

When Lyris changes the status of a contact to Unsubscribed, the event is received by Aurea CRM and it executes a predefined named trigger. You can define the trigger logic based on your business requirements. To set up the required trigger, contact your Aurea CRM System administrator.

## Handling Email Marketing Message Deleted Event

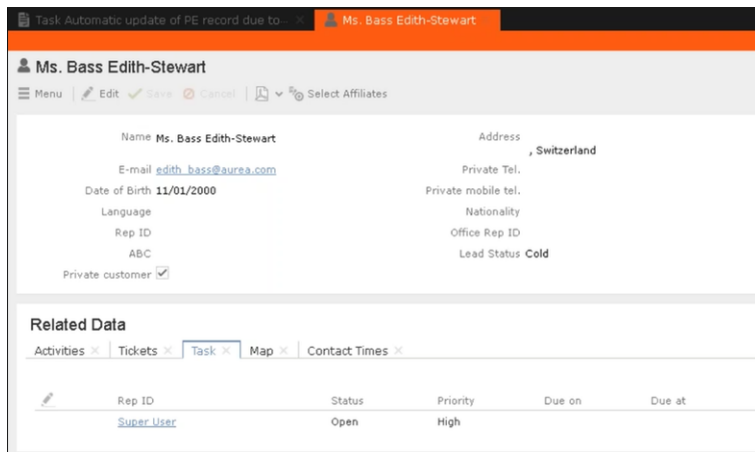
When an Email marketing message is deleted from Lyris, the event is received by Aurea CRM and it executes a predefined named trigger. You can define the trigger logic based on your business requirements. For example, a trigger can be executed to clear the Email properties in Aurea CRM. To set up the required trigger, contact your Aurea CRM System administrator.

A notification message informs the responsible Rep for the marketing activity of the message deletion in the Aurea Campaign Manager. Also, the Create in Lyris button is deactivated and visible in the Define Format tab of the Channel and Format definition page of the marketing activity, as shown in the screenshot below. If required, you can define and save the message format again, before saving it to Lyris.



## Handling events with faulty data

Sometimes information received from Aurea Campaign Manager might be faulty and Aurea CRM is unable to perform further processing. Such events are presented as tasks to the Rep responsible for the corresponding marketing activity whose event data could not be processed by Aurea CRM. This enables the Rep to identify the issue and update the proper records manually. All the tasks set up for a Rep can be viewed in the Person, Person Company info areas. In the screenshot below, the Task tab shows all the tasks assigned to the Rep in the Related Data section.



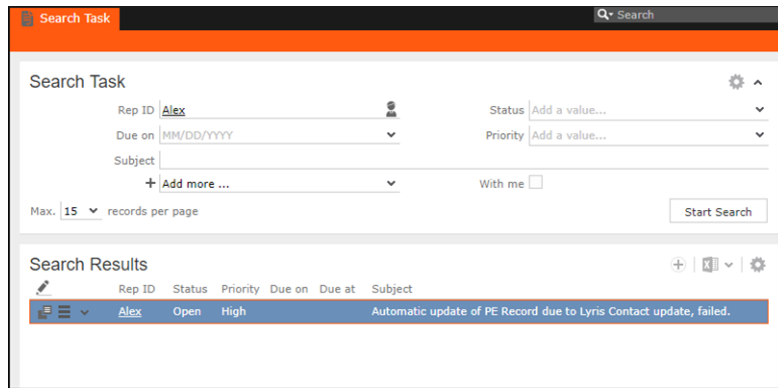
Events generated with invalid data also generate appropriate log messages that are useful in understanding the type of invalid data and provide meaningful clues about the fault. Some of the invalid data scenarios are listed below:

- Invalid Message ID
- Invalid Mailing list ID
- Click events generated by recipients who are not members of Aurea CRM.

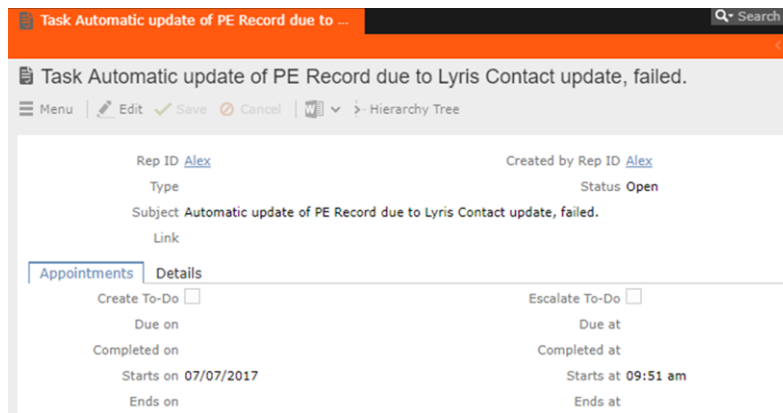
To illustrate this lets consider a scenario where the contact's demographics property country is updated. This demographics property in the Aurea Campaign Manager is mapped to the field land and its value needs to be selected from a catalog. The Contact's information cannot be updated by Aurea CRM in the Person (PE) info area record, if the new country value is not present in the CRM catalog.

To handle such events, perform the following steps:

1. Select Collaboration ( ) à Tasks from the main menu. The Search Task page opens.
2. Set the required filter criteria and click Start Search. The search results display.

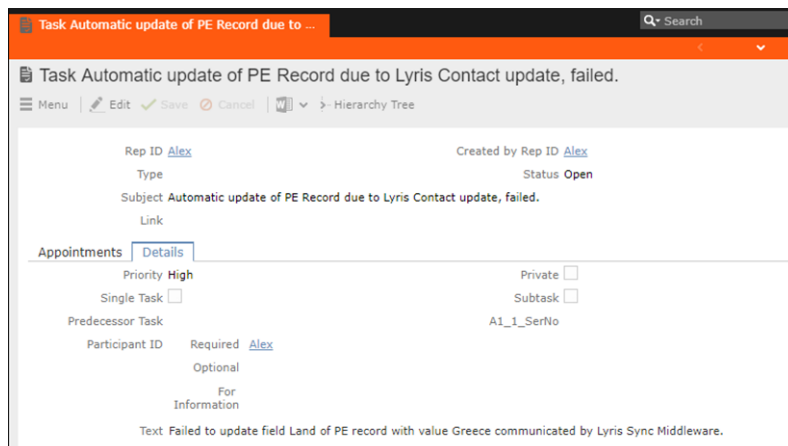


3. Double click on the task. The task page displays.



The Subject field provides the information about the failed attempt to update the Person record.

4. Click the Details tab. You can find more information about the reasons for the failed activity. Which should inform you about the subsequent actions to take.



In the screenshot above, from the information provided in the Text field you can conclude that the catalog needs to be updated with the new country name. And then the person record needs to be updated with the new country field.

## URLs for a Marketing Response – FSI only

You can configure the marketing activity messages to display links for each response type, that the recipients can click to record his/her response.

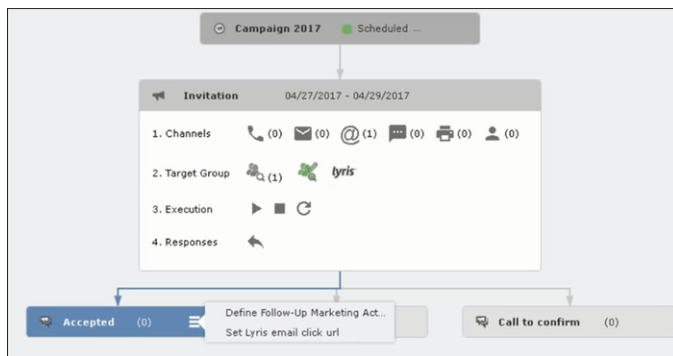
The steps described in the sections below, assume an example "Invitation" marketing activity. The expected response from the recipient is to 1. Accept the invitation, 2. Reject the invitation, or 3. Call to confirm. Each of the response to the marketing activity could be configured with a URL that correspond to a link that is presented to the recipients of the Invitation email message. In the steps described below, we set the response URL for the Accepted response.

**Important:** The corresponding email marketing message in the Aurea Campaign Manager should be edited to include the response links, and their URLs should match the values set in Aurea CRM exactly.

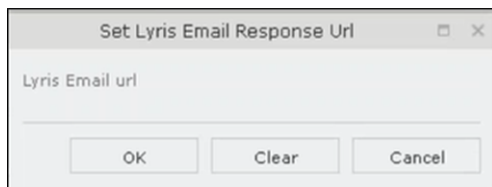
### Specifying a Response URL from the Campaign Designer

To specify response URLs for a marketing activity from the Campaign Designer, perform the following steps:

1. Click  in the Accepted response. The context menu displays.



2. Select Set Lyris Email Click URL. The dialog displays.



3. Enter the required Response URL. For example, `http://www.aurea.com?response=Accepted`.

**Note:** Use the Clear button to clear any long URL value set previously.

4. Click OK.

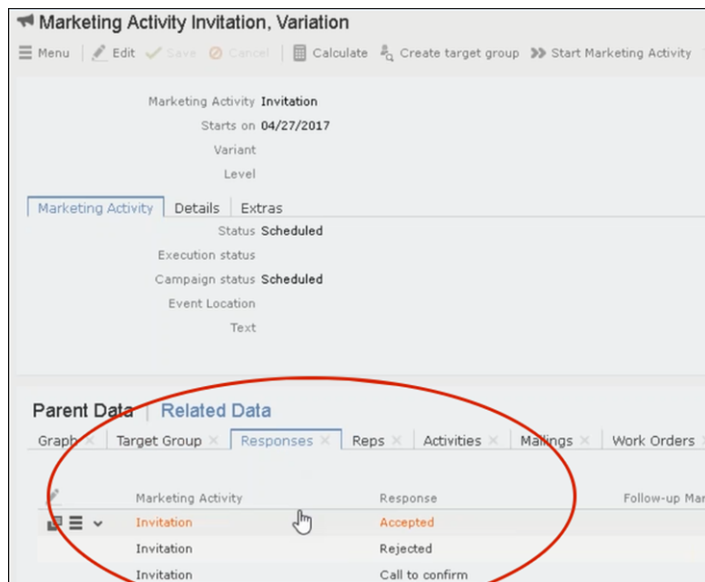
## Specifying a Response URL from the Standard Editor

To specify response URLs for a marketing activity from the Standard Editor, perform the following steps:

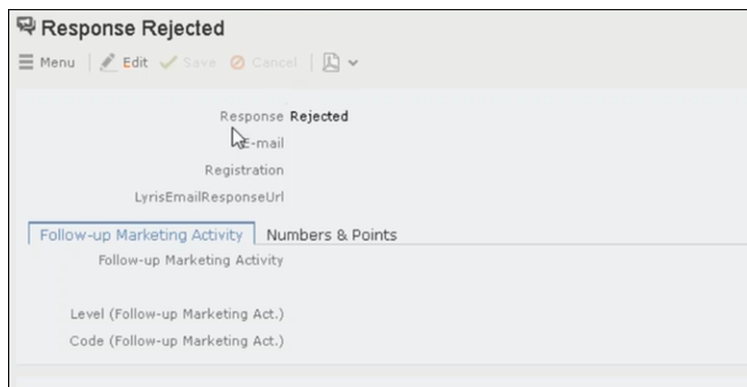
1. Select Marketing > Marketing Activities from the CRM menu. The Search Marketing activities page displays.
2. Enter the search filters and click Start Search. The search results list displays.
3. Open the context menu of the required marketing activity from the result list and select Tab View or Tree View. The Marketing Activity window displays.

**Note:** Double clicking a marketing activity from the result list opens the marketing activity in the campaign designer.

4. Click the Responses tab. The configured responses are listed.



5. Double click on any of the response to open it. The following screenshot shows the Rejected response.



6. Click Edit.

7. Enter the required URL for this response, in the LyrisEmailResponseURL field.
8. Click Save.

### Handling URL Click Events

Aurea CRM marketing activity email messages generated by the Aurea Campaign Manager can contain response URL links to capture response from the target group members. When a recipient clicks on an URL, Aurea Campaign Manager generates an Email click event. On receiving the Email click event from the CRM Sync Middleware, Aurea CRM records the response in the Mailings (BR) info area record for the target group member, for each marketing activity. The response recorded in the Mailing record for the marketing activity is based on the URL received in the URL click even. The response URL found in the response event data should exactly match the value set in the URL response. If there is no match the response is ignored.

While the user can send different responses set for a marketing activity, an event is generated by the Aurea Campaign Manager only for the first response. Subsequent responses are ignored by the Aurea Campaign Manager.

### Viewing the Responses in the Mailings Info Area

When a message recipient clicks on a response URL, the response is recorded in the Mailings info area. The user can click on multiple responses and they are recorded. A maximum of five responses per recipient can be recorded in the Mailing Info area. Using the same example scenario described for specifying the response URL, we assume that the recipient clicks on two response links for Accepted, and Call to confirm.

To view the response for a marketing activity, perform the following steps:

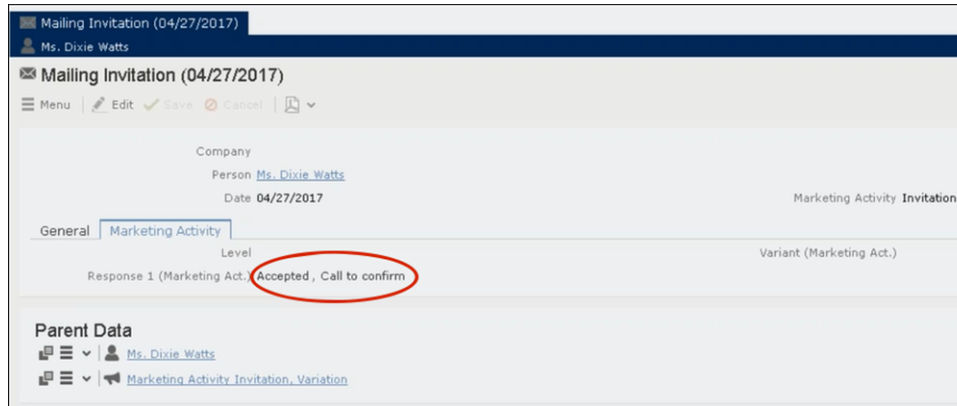
1. Select Marketing > Mailings from the CRM menu. The Search Mailings page displays.
2. Enter the required search criteria and click Start Search. The search results displays.



3. Double click on the required Mailing record from the Search Results list. The Mailing page for the target group member and the marketing activity opens.

**Note:** In the sample scenario the marketing activity was named Invitation and the Mailing page for this instance is named Mailing Invitation.

- Click the Marketing Activity tab. The Responses from the target group member are listed in the Response 1 (Marketing Activity) field. This field can record up to five responses.

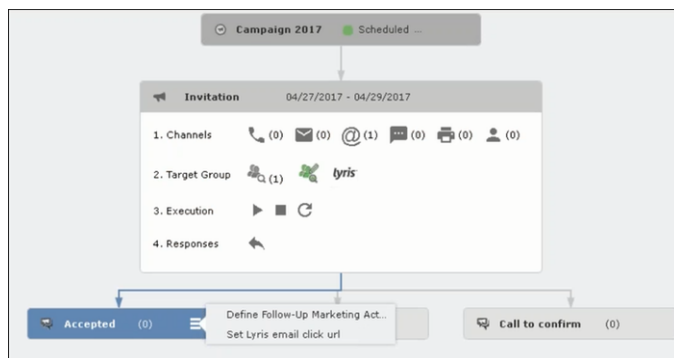


In the sample scenario the user has clicked on two response URLs: **Accepted** and **Call to confirm**

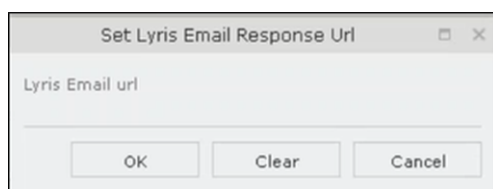
## Specifying a Response URL from the Campaign Designer

To specify response URLs for a marketing activity from the Campaign Designer, perform the following steps:

- Click  in the Accepted response. The context menu displays.



- Select Set Lyris Email Click URL. The dialog displays.



- Enter the required Response URL. For example, `http://www.aurea.com?response=Accepted`.

---

**Note:** Use the Clear button to clear any long URL value set previously.

---

4. Click OK.

## Specifying a Response URL from the Standard Editor

To specify response URLs for a marketing activity from the Standard Editor, perform the following steps:

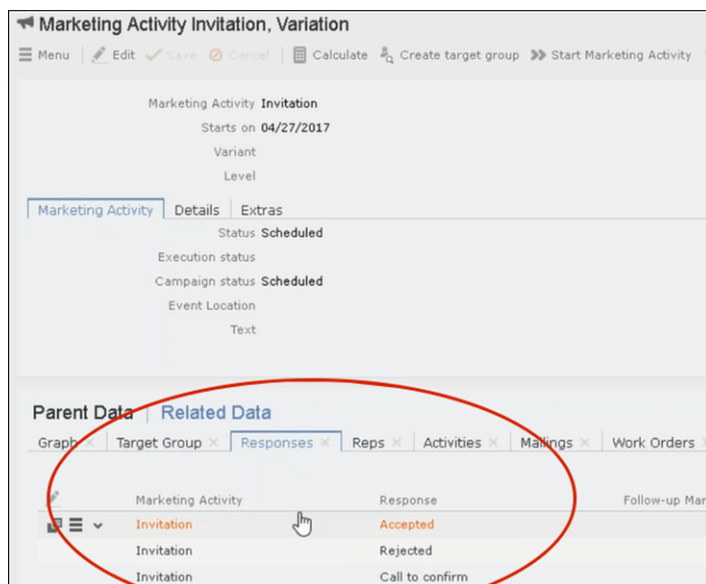
1. Select Marketing > Marketing Activities from the CRM menu. The Search Marketing activities page displays.
2. Enter the search filters and click Start Search. The search results list displays.
3. Open the context menu of the required marketing activity from the result list and select Tab View or Tree View. The Marketing Activity window displays.

---

**Note:** Double clicking a marketing activity from the result list opens the marketing activity in the campaign designer.

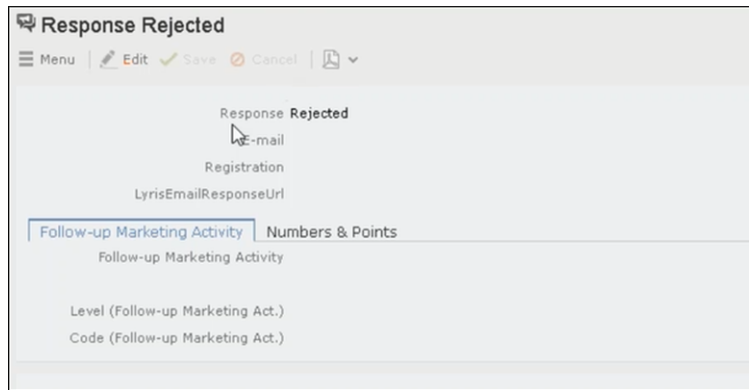
---

4. Click the Responses tab. The configured responses are listed.



5. Double click on any of the response to open it. The following screenshot shows the Rejected response.





6. Click Edit.
7. Enter the required URL for this response, in the LyrisEmailResponseURL field.
8. Click Save.

## Handling URL Click Events

Aurea CRM marketing activity email messages generated by the Aurea Campaign Manager can contain response URL links to capture response from the target group members. When a recipient clicks on an URL, Aurea Campaign Manager generates an Email click event. On receiving the Email click event from the CRM Sync Middleware, Aurea CRM records the response in the Mailings (BR) info area record for the target group member, for each marketing activity. The response recorded in the Mailing record for the marketing activity is based on the URL received in the URL click event. The response URL found in the response event data should exactly match the value set in the URL response. If there is no match the response is ignored.

While the user can send different responses set for a marketing activity, an event is generated by the Aurea Campaign Manager only for the first response. Subsequent responses are ignored by the Aurea Campaign Manager.

## Viewing the Responses in the Mailings Info Area

When a message recipient clicks on a response URL, the response is recorded in the Mailings info area. The user can click on multiple responses and they are recorded. A maximum of five responses per recipient can be recorded in the Mailing Info area. Using the same example scenario described for specifying the response URL, we assume that the recipient clicks on two response links for Accepted, and Call to confirm.

To view the response for a marketing activity, perform the following steps:

1. Select Marketing > Mailings from the CRM menu. The Search Mailings page displays.
2. Enter the required search criteria and click Start Search. The search results displays.



3. Double click on the required Mailing record from the Search Results list. The Mailing page for the target group member and the marketing activity opens.

**Note:** In the sample scenario the marketing activity was named Invitation and the Mailing page for this instance is named Mailing Invitation.

4. Click the Marketing Activity tab. The Responses from the target group member are listed in the Response 1 (Marketing Activity) field. This field can record up to five responses.



In the sample scenario the user has clicked on two response URLs: **Accepted** and **Call to confirm**

# 13

## Event Management – FSI

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Learn how to manage event management using Aurea CRM.

Aurea CRM allows you to depict the thematic and organizational structure of events by adding events as campaigns and executing the following steps:

- **Planning:** Estimate the number of participants, select a venue and lecturers and create a program, see [Planning Events](#) on page 471.
- **Approval:** The responsible persons verify and approve the event (regarding the budget/and or compliance), see [Verifying and Approving Events](#) on page 476.
- **Execution:** Generate the target group, add any necessary additional customers to the target group, send out invitations, administrate the participants and organize hotels, transfers etc., see [Executing Events](#) on page 478.
- **Follow-up:** You can evaluate the event and calculate the costs, see [Rating Events](#) on page 482 and [Monitoring Event Costs](#) on page 486.

For general information on campaigns and marketing activities, see [Campaigns and Marketing Activities](#) on page 327. Functions specific to events are described in the following sections.

### Planning Events

This topic has step by step for planning events.

To plan an event:

1. Add a new campaign, see [Adding Campaigns](#) on page 331.
2. Enter yourself as the **Responsible** rep in the campaign (so that you receive any messages concerning the approval of the event).
3. Add the necessary marketing activities such as sending out invitations, the main event itself, mailings (for persons that cannot attend), and sending out brochures (for persons who did not attend), see [Defining Marketing Activities](#) on page 333.
4. Add marketing activity responses to the activities and select the corresponding follow-up marketing activities for the responses.

The values in the **Registration** and **Participation Status** fields of marketing activity responses are used to manage the participants, see [Managing Participants](#) on page 482.

5. Enter the details of the hotels and venue.

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**Note:** Add hotels, venues and other partners (e.g. catering, entertainment) as companies in Aurea CRM and assign a company type (e.g. "Hotel").

Enter the corresponding company in the **Event Location** field in the marketing activity.

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6. Enter information on any required equipment in the **Equipment** info area, see [Adding Equipment](#).
  7. Add the agenda, see [Creating an Agenda](#).
  8. Select speakers and lecture subjects, see [Adding Lecture Subjects](#).
- 

**Note:** Speakers need to be added to Aurea CRM as persons.

---

9. Create a query that returns the persons and companies that should attend the event, see [Queries](#) on page 98. You can also add participants manually.
10. Switch to the marketing activity, select **New/Edit Execution** from the context menu and determine how the marketing activity should be executed, see [Defining How the Marketing Activity is Executed](#) on page 336.
11. Ask for quotes and enter the estimated costs of the event in the **Costs: Entire event** field of the campaign.
12. Submit the event for approval. A message is sent to you once the event has been approved, see [Verifying and Approving Events](#) on page 476.
13. Execute the event, see [Executing Events](#) on page 478.

## Adding Equipment

If your event requires special equipment not available at the venue, for example, you can enter information on the equipment.

1. Switch to the **Equipment** node in the campaign's tree view.
2. Click on **+** (**New**).

The screenshot shows a form titled "New: Equipment" with a green checkmark icon. The form contains the following fields:


- Equipment:** A dropdown menu with "Extra Seats" selected.
- Description:** A text area containing "Seats for key note speeches".
- Quantity:** A text input field with "100" entered.
- Currency:** A dropdown menu with "EUR" selected.
- Costs:** A text input field with "Costs (2C)" entered.

3. Enter the equipment's details, such as the type, associated costs, quantity etc.
4. Save the record.

### Adding Lecture Subjects

Add topics available for all events in the **Lecture Subject** info area.

To add a new lecture subject:


1. Select  (**Marketing**) > **Lecture Subjects**.
2. Click on **Start Search** and then on **+** (**New**).
3. Enter details on the topic, such as the field, duration and whether the topic represents a lecture or training subject.
4. Save the record.

### Assigning Lecture Subjects to Speakers

To assign a subject to a speaker:

1. Open the company tree view and switch to the **Lecture Subjects** node under the desired person.
2. Click on **+** (**New**).
3. Select a lecture subject.
4. Save the record.

To assign a lecture subject to a speaker:


1. Select  (**Marketing**) > **Lecture Subjects**.
2. Click on **Start Search**.
3. Open the desired lecture subject.
4. Click on **+** (**New**) on the **Speakers** tab.
5. Select the desired person.
6. Save the record.

### Creating an Agenda

You can add an agenda for each campaign representing an event or track. Add agenda items to the agenda, such as lectures, coffee and lunch breaks, entertainment etc.

To add an agenda item:

1. Switch to the **Agenda Items** node in the campaign's tree view.
2. Click on **+** (**New**).

3. Select the speaker:
  - a. Click on  (**Select**) next to the **Person** field.
  - b. Click on **Start Search**.
  - c. Select the desired person.
4. Select the **Lecture Subject**.
5. Enter further information, such as the time and location.
6. Switch to the **Speaker** tab to enter further information such as the date of the invitation, the date of confirmation and fee.
7. Save the record.


## Hotels and Venues

Add hotels, venues and other partners (e.g. catering, entertainment) as companies in Aurea CRM and assign a company type (e.g. "Hotel").

Enter the corresponding company in the **Event Location** field in the marketing activity.

## Adding Equipment

If your event requires special equipment not available at the venue, for example, you can enter information on the equipment.

1. Switch to the **Equipment** node in the campaign's tree view.
2. Click on  (**New**).

The screenshot shows a form titled "New: Equipment" with a green checkmark icon. The form contains the following fields:

- Equipment:** A dropdown menu with "Extra Seats" selected.
- Description:** A text input field containing "Seats for key note speeches".
- Quantity:** A text input field with "100".
- Currency:** A dropdown menu with "EUR" selected.
- Costs:** A text input field with "Costs (2C)".


3. Enter the equipment's details, such as the type, associated costs, quantity etc.
4. Save the record.

---

## Adding Lecture Subjects

Add topics available for all events in the **Lecture Subject** info area.

To add a new lecture subject:

1. Select  (**Marketing**) > **Lecture Subjects**.
2. Click on **Start Search** and then on **⊕ (New)**.
3. Enter details on the topic, such as the field, duration and whether the topic represents a lecture or training subject.
4. Save the record.


## Adding Speakers

### Assigning Lecture Subjects to Speakers

To assign a subject to a speaker:

1. Open the company tree view and switch to the **Lecture Subjects** node under the desired person.
2. Click on **⊕ (New)**.
3. Select a lecture subject.
4. Save the record.

To assign a lecture subject to a speaker:

1. Select  (**Marketing**) > **Lecture Subjects**.
2. Click on **Start Search**.
3. Open the desired lecture subject.
4. Click on **⊕ (New)** on the **Speakers** tab.
5. Select the desired person.
6. Save the record.

## Creating an Agenda

You can add an agenda for each campaign representing an event or track. Add agenda items to the agenda, such as lectures, coffee and lunch breaks, entertainment etc.

To add an agenda item:

1. Switch to the **Agenda Items** node in the campaign's tree view.
2. Click on ⊕ (**New**).
3. Select the speaker:
  - a. Click on 🔍 (**Select**) next to the **Person** field.
  - b. Click on **Start Search**.
  - c. Select the desired person.
4. Select the **Lecture Subject**.
5. Enter further information, such as the time and location.
6. Switch to the **Speaker** tab to enter further information such as the date of the invitation, the date of confirmation and fee.
7. Save the record.

## Verifying and Approving Events

Depending on your internal organization, events may require approval or verification.

Approval consists of two steps:

1. The rep submits the event for approval, see [Requesting Approval/Verification](#).
2. The responsible person approves the event and/or verifies that it complies with necessary regulations, see [Approving/Rejecting/Verifying Events](#).
  - Approval: An employee, e.g. head of marketing, must approve whether the planned event is within budget.
  - Verification: An employee, e.g. from the legal department, verifies that the event complies with the legal requirements. This can be of particular relevance in the pharmaceutical industry.

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**Note:** Once the status of a campaign is set to "Budget Approval", it can no longer be executed. Only once the campaign has been approved and verified (which automatically sets the status to "Scheduled") can you execute the campaign.

---

### Requesting Approval/Verification

The rep that scheduled the event submits the campaign for approval.

To submit an event for approval:

1. Switch to the desired campaign.
2. Switch to the **Approval & Verification** tab.



- 
3. Enable the **Budget approval required** check box and enter the person responsible for approving the event in the **Budget approval by** field.
  4. Enable the **Verification required** check box and enter the person responsible for verifying the event complies with legal provisions in the **Verification by** field.

---

**Note:** The campaign's start date must be in the future, otherwise the **Budget approval required** and **Verification required** check boxes cannot be enabled. If the start date is not in the future at the time of submission, these check boxes are disabled automatically by the system (without notification).

---

5. Save the record.

The campaign is forwarded to the employee responsible for approving/verifying the event.

You will receive a message when the campaign has been approved or verified.

### Approving/Rejecting/Verifying Events

If you are responsible for approving or verifying events, you will be informed using a To-Do record whenever a campaign has been submitted.

To approve or reject a campaign:

1. Select **Open Link** from the To-Do's context menu. The campaign is opened. Verify that the event is within budget or that all legal requirements are met.
2. Select the appropriate option from the context menu. The campaign is approved or rejected.
3. Save the record.

The rep responsible for the campaign receives a message about whether the event has been approved, verified or rejected.

## Requesting Approval/Verification

The rep that scheduled the event submits the campaign for approval.

To submit an event for approval:

1. Switch to the desired campaign.
2. Switch to the **Approval & Verification** tab.
3. Enable the **Budget approval required** check box and enter the person responsible for approving the event in the **Budget approval by** field.
4. Enable the **Verification required** check box and enter the person responsible for verifying the event complies with legal provisions in the **Verification by** field.

---

**Note:** The campaign's start date must be in the future, otherwise the **Budget approval required** and **Verification required** check boxes cannot be enabled.

---

If the start date is not in the future at the time of submission, these check boxes are disabled automatically by the system (without notification).

---

5. Save the record.

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## Approving/Rejecting/Verifying Events

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1. Select **Open Link** from the To-Do's context menu. The campaign is opened. Verify that the event is within budget or that all legal requirements are met.
2. Select the appropriate option from the context menu. The campaign is approved or rejected.
3. Save the record.

The rep responsible for the campaign receives a message about whether the event has been approved, verified or rejected.

## Executing Events

Learn to add and manage participants for an event.

To execute an event:

1. Switch to the marketing activity you wish to execute.
2. Add the event's participants, see [Adding Participants](#).
3. You can determine which lectures participants will attend, see [Creating a Participant Program](#).
4. Upon receiving responses, e.g. to invitations, enter the responses, see [Managing Participants](#).
5. Once the event has been held, you need to enter whether participants actually attended the event, see [Editing Generated Records](#) on page 341.

---

## Adding Participants

Event participants are added to the campaign. Participants can be added automatically based on a query, or can be added manually. For example, the participants can be generated based on their participation status (e.g. "Registered" or "Participated").

To add participants manually:

1. Switch to the desired marketing activity or campaign.
2. Click on the **Attendees** node in the campaign tree.
3. Click on ⊕ (**New**).
4. Enter details on the participant, e.g.:
  - Name
  - The type of participant (e.g. participant), participation status (e.g. registered or confirmed)
  - Enter information concerning the participant's registration date, any cancelations etc. on the **Registration** tab
  - Enter information on the participant's accommodation on the **Hotel** tab, e.g. name of the hotel, type of room
  - Enter information on the **Travel Information** tab such as the date of arrival and departure, mode of transportation, whether a transfer is required etc.
5. Save the record.

## Creating a Participant Program

To create a program for individual participants, add a participant program:

1. Click on the desired participant in the campaign tree.
2. Click on ⊕ (**New**) on the **Agenda Items** tab.
3. Select an agenda item.
4. Save the record.

Alternatively, add the participant to the agenda item:

1. Click on the desired agenda item in the campaign tree.
2. Click on ⊕ (**New**) on the **Attendees** tab.
3. Select the participant.
4. Save the record.

## Managing Participants

You can manage participants for each marketing activity in two ways:

- By changing the **Participation Status** in the participant record (Registered, Confirmed, Canceled, Participated, Missed).
- By entering responses in the generated activities and mailings. Depending on the **Registration** and **Participation Status** defined for the response, participants are added or edited automatically:
  - **Registration** field:
    - Register: A target group record is automatically added to the follow-up activity entered and a participant record added to the campaign (**Participation Status** = "Registered" and **Registered on** = current date).
    - Unregister: A target group record is automatically added for the follow-up marketing activity entered (but **no** participant record is added to the campaign).
  - **Participation Status** field:
    - Participated: The participations status in the participant record is set to "Participated" and a target group record is added for the follow-up marketing activity.
    - Missed: The participations status in the participant record is set to "Missed" and a target group record is added for the follow-up marketing activity.
- If you change the response at a later date, the target group and participant records are updated:

"Yes, I'm coming" -> "I can't make it": The participant record is set to "Canceled", the registration date is deleted and the cancelation date entered. The target group record added for the original follow-up activity is deleted, and a new target group record is added for the new follow-up activity.

---

**Note: Attention:** When entering responses, ensure that you only select a single answer. Multiple responses can lead to undesired results.

---

## Adding Participants

Event participants are added to the campaign. Participants can be added automatically based on a query, or can be added manually. For example, the participants can be generated based on their participation status (e.g. "Registered" or "Participated").

To add participants manually:

1. Switch to the desired marketing activity or campaign.
2. Click on the **Attendees** node in the campaign tree.
3. Click on ⊕ (**New**).

4. Enter details on the participant, e.g.:

- Name
- The type of participant (e.g. participant), participation status (e.g. registered or confirmed)
- Enter information concerning the participant's registration date, any cancelations etc. on the **Registration** tab
- Enter information on the participant's accommodation on the **Hotel** tab, e.g. name of the hotel, type of room
- Enter information on the **Travel Information** tab such as the date of arrival and departure, mode of transportation, whether a transfer is required etc.

5. Save the record.

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To create a program for individual participants, add a participant program:

1. Click on the desired participant in the campaign tree.
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3. Select an agenda item.
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1. Click on the desired agenda item in the campaign tree.
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---

**Note: Attention:** When entering responses, ensure that you only select a single answer. Multiple responses can lead to undesired results.

---

## Rating Events

Once an event has been held, you can collect information on how the participants rated the event using a questionnaire.

This rating can then be entered in Aurea CRM web. Ratings can be entered for the venue, speakers and accommodation.

## Rating Speakers

Enter the ratings of speakers received from individual participants in the corresponding agenda item of the participant program.

To rate a speaker:

1. Click on the desired participant in the campaign tree.
2. Select an agenda item on the **Agenda Items** tab.
3. Enter the rating from the questionnaire in the **Evaluation: Lecture Subject** and **Evaluation: Speaker** fields.
4. Save the record.

---

**Note:** You can enter anonymous ratings in the agenda item (in the campaign). Enter the number and sum total from the anonymous ratings here.

---

## Rating the Venue and Hotels

Enter the rating of the venue and accommodation in the participant record.

To rate the venue and hotel:

1. Click on the desired participant in the campaign tree.
2. Enter the rating of the venue in the **Rating: Venue** field.
3. Enter the hotel's rating in the **Rating: Accommodation** field.

## Calculating the Overall Rating

You can calculate the average rating of the event, accommodation and speakers based on all the individual ratings.

Your administrator defines a date. All events with the same or a later start date are included in the calculation. The result is the mean of all ratings entered for the event, accommodation and speakers.

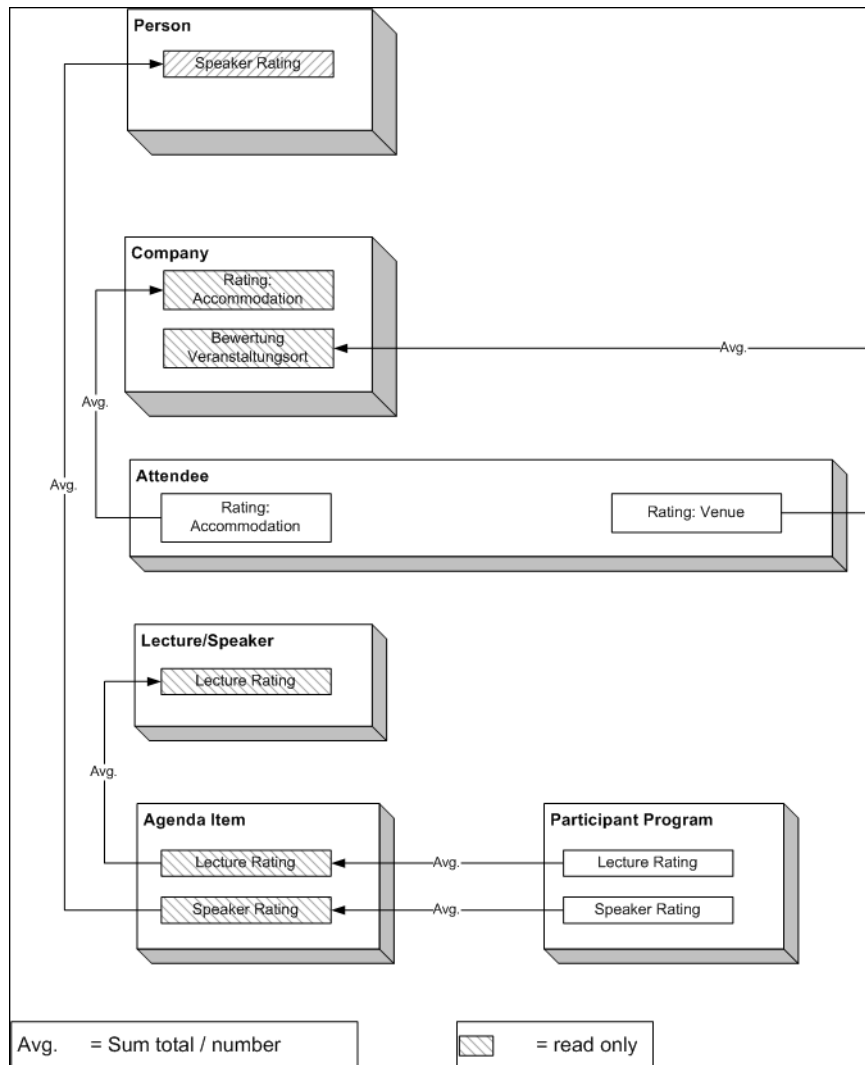
To calculate the rating:

1. Select  (Marketing) > Calculate Lecture/Speaker Rating or  (Marketing) > Calculate Accommodation/Venue Rating from the application menu.

The mean value of all ratings is entered in the **Rating** field in the corresponding records:

- Agenda item: **Lecture Rating** and **Speaker Rating**
- Lecture subject with the same lecture subject and speaker: **Lecture Rating**
- Person record of the speaker: **Speaker Rating**
- Company record of the venue: **Rating: Venue**
- Company record of the hotel entered for participants: **Rating: Accommodation**

**Note:** These **Evaluation** fields are not write-protected. You can enter the overall rating manually. Values in the **Rating** fields are overwritten the next time the calculation is performed.



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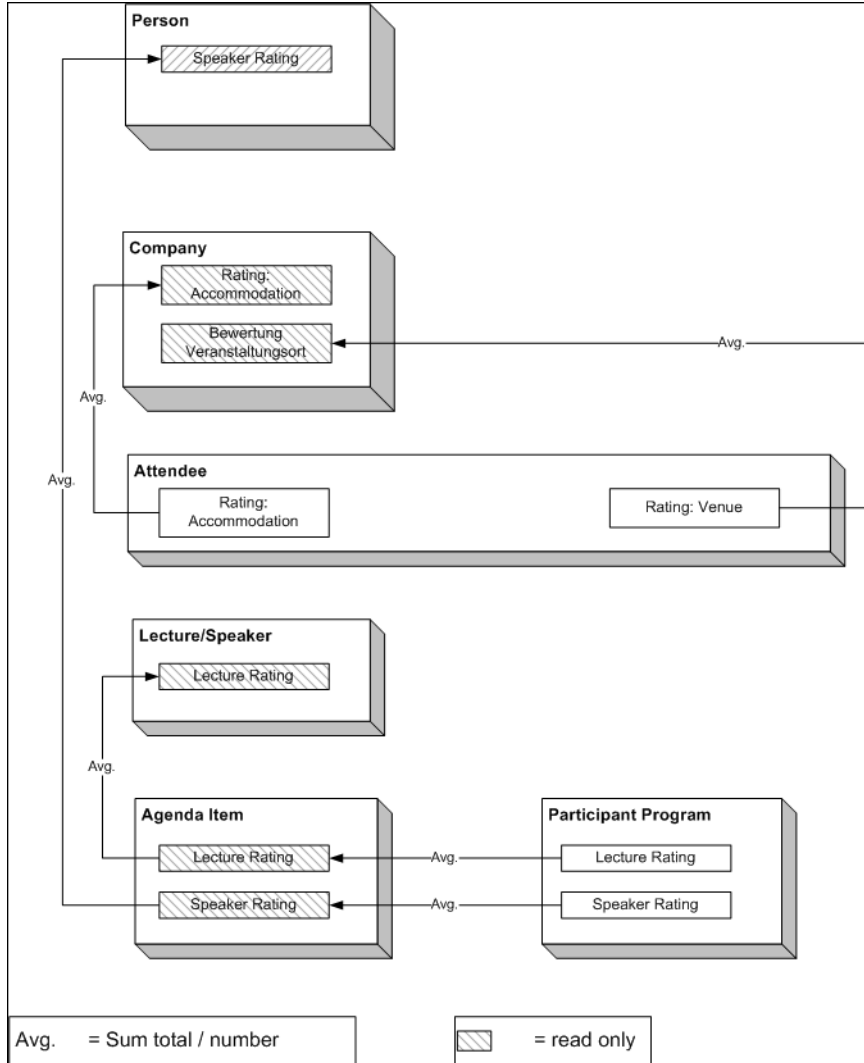
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- Company record of the hotel entered for participants: **Rating: Accommodation**

**Note:** These **Evaluation** fields are not write-protected. You can enter the overall rating manually. Values in the **Rating** fields are overwritten the next time the calculation is performed.



## Monitoring Event Costs

Learn to monitor event costs using Aurea CRM web.

When holding an event, various costs are accrued, e.g. for renting rooms, transportation costs etc. You can enter the costs for accommodation (hotel) and transport in the corresponding participant records. The costs entered for all participants are totaled and displayed in the campaign record.

To display the costs of a campaign:

1. Switch to the desired campaign.
2. Switch to the **Target Group Size & Costs** tab. The following costs are totaled for all participants:
  - Accommodation costs in the **Costs: Hotel** field.
  - Transportation costs in the **Costs: Transport** field.
  - The participant's own contribution in the **Costs: Own costs contribution** field.
3. You can enter any further costs (e.g. rent for the venue and equipment, fees and travel expenses for speakers) in the **Costs: Entire Event** field.

# 14

## Customer Service – FSI

Customer service management in Aurea CRM.

Aurea CRM offers following customer services:

### Complaint Management


Complaints management is of great importance for the customer relations of financial service providers and is also essential to comply with MiFID requirements.




You can add and classify complaints in Aurea CRM web, forward them to the responsible person, find solutions and notify the customer of the steps you have taken by e-mail.

Complaints can be added directly or using the complaint process. When adding complaints directly, you only need to enter initial information, and the person responsible for processing the complaint takes care of the remaining steps, see [Adding Complaints Directly](#). The complaint process guides you through the steps necessary to process a complaint, see [Complaint Process](#).

#### Adding Complaints Directly

To add a complaint directly:

1. Select  (**Service**) > **Complaints (Quick Add)**.
2. Enter the **Claimant**, **Subject** and a **Problem Description**.

New: Complaint		
		
*Claimant	John Archibald Peter Higginsbotham	
*Subject	Antarctic solar farms	
Problem Des...	Investments in Antarctic solar farms are not yielding the ROI expected; customer is thinking shifting focus to Saharan bottled water.	



3. Save the record.

The responsible service agent will then process the complaint.


**Note:** Complaints added directly using the quick add option are automatically linked to the your company (the company flagged as the system company) and can be found there.

## Adding Complaints and Starting the Complaints Process

To add a complaint and start the complaints process:

1. Select  (**Service**) > **Complaints**.
2. Click on **Start Search** and then on  (**New**).
3. Enter a **Subject** and **Problem Description**.

To add a complaint for a company/person:

1. Click on **Complaints** in the company/person tree.
2. Click on  (**New**).


To edit an existing complaint:

1. Search for the complaint by either selecting  (**Service**) > **Complaints** or switch to the **Complaints** node in the company/person tree.

---

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---

2. Select the complaint and click on  (**Manage**).

The complaint process is started in all cases (in the last opened phase).


## Complaint Process

The complaint management process consists of the following phases:

- **Basic Data:**




Enter basic data concerning the complaint and select the customer who submitted the complaint.

- **Contact Data:**



Click on  (**Edit Contact Data**) to edit the contact data of the company/person.

You can also add activities and documents relating to the complaint.

To inform the customer of the status of the complaint:

1. Click on  (**Create E-mail**).
2. Select a template.
3. Click on  (**Edit**) and complete the e-mail.
4. Click on  (**Send as E-mail**).

An e-mail activity is added.

5. Click on  (**Back to overview**).
6. Click on  (**Next**)

- **Qualification:**

You can classify complaints by type, expectation, priority and determine whether it is MiFID-relevant.

The **Due on** date is entered based on the priority (Low: creation date+14 days; Medium: +7 days; High: +3 days).

Save the record. The process switches to the next phase.

- **Solution:**

Enter the solution and inform the customer:

1. Enter the cause and solution in the **Cause Description** and **Solution Description** fields.
2. Save the record.
3. You can inform the customer of the solution by e-mail:
  - a. Click on (**Create E-mail**).
  - b. Select a template.
  - c. Click on (**Edit**) and complete the e-mail.
  - d. Click on (**Send as E-mail**).

- **Complete:**




The status of the complaint is automatically set to "Closed".

If the same issue arises again, click on (**Reopen**) to add a new complaint linked to the original complaint. The original complaint is then displayed on the **Associated Complaints** tab of the new complaint.

## Adding Complaints Directly

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1. Select (**Service**) > **Complaints (Quick Add)**.
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New: Complaint		
		
*Claimant	John Archibald Peter Higginsbotham	
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### 3. Save the record.

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To edit an existing complaint:

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Click on  (**Edit Contact Data**) to edit the contact data of the company/person.

You can also add activities and documents relating to the complaint.

To inform the customer of the status of the complaint:

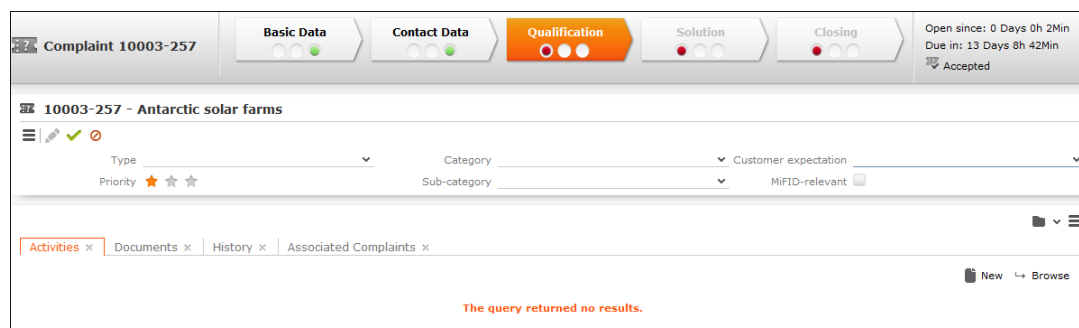
1. Click on  (**Create E-mail**).
2. Select a template.
3. Click on  (**Edit**) and complete the e-mail.
4. Click on  (**Send as E-mail**).

An e-mail activity is added.

5. Click on  (**Back to overview**).
6. Click on  (**Next**)

- **Qualification:**

You can classify complaints by type, expectation, priority and determine whether it is MiFID-relevant.



The screenshot displays the complaint management interface for 'Complaint 10003-257'. The top navigation bar shows the current phase as 'Qualification' (highlighted in orange) with other phases: 'Basic Data', 'Contact Data', 'Solution', and 'Closing'. The 'Qualification' phase has three active indicators (red, white, and orange circles). The right side of the header shows 'Open since: 0 Days 0h 2Min', 'Due in: 13 Days 8h 42Min', and 'Accepted'. The main content area shows the complaint title '10003-257 - Antarctic solar farms' and a search bar. Below the search bar are filters for 'Type', 'Priority' (with three star icons), 'Category', 'Sub-category', 'Customer expectation', and 'MiFID-relevant' (with a checkbox). A tabbed interface below the filters shows 'Activities' as the active tab, with other tabs for 'Documents', 'History', and 'Associated Complaints'. At the bottom, a message states 'The query returned no results.' and there are 'New' and 'Browse' buttons.




The **Due on** date is entered based on the priority (Low: creation date+14 days; Medium: +7 days; High: +3 days).



Save the record. The process switches to the next phase.


- **Solution:**

Enter the solution and inform the customer:

1. Enter the cause and solution in the **Cause Description** and **Solution Description** fields.
2. Save the record.
3. You can inform the customer of the solution by e-mail:
  - a. Click on  (**Create E-mail**).
  - b. Select a template.
  - c. Click on  (**Edit**) and complete the e-mail.
  - d. Click on  (**Send as E-mail**).

- **Complete:**

The status of the complaint is automatically set to "Closed".

If the same issue arises again, click on  (**Reopen**) to add a new complaint linked to the original complaint. The original complaint is then displayed on the **Associated Complaints** tab of the new complaint.

## Service Requests in CRM.loop

You can process service requests concerning a product, e.g. those posted by sales partners that are members of your CRM.loop community.


Answers posted in Aurea CRM are also posted in CRM.loop.

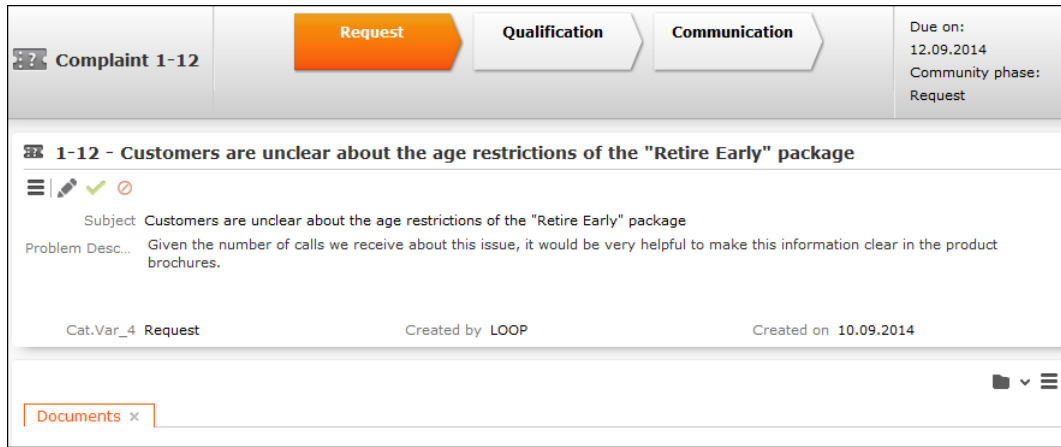
For further information on CRM.loop, contact your Aurea representative.

1. A service request is posted in CRM.loop.
2. A complaint of the type "CRM.loop service" is automatically added in Aurea CRM web.
3. Process the request, see [Processing CRM.loop Requests](#).
4. Answers posted in Aurea CRM are also posted in CRM.loop.

### Processing CRM.loop Requests

To process a service request posted to CRM.loop:

1. Select  (**Service**) > **CRM.loop Service**.
2. Search for and open the service request.



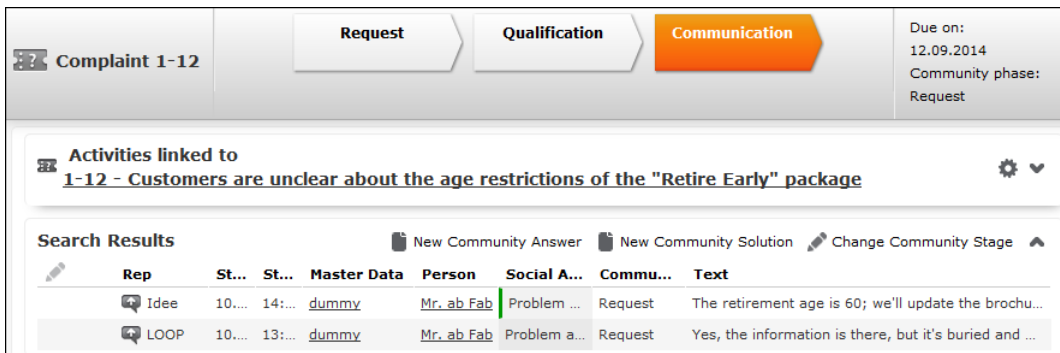
3. Service requests are processed in the following phases:

- **Request:** The subject and a description of the problem are displayed in this phase.
- **Qualification:** In this phase, you can enter data in order to qualify the request, e.g.:
  1. The cause of the problem
  2. A suggested solution
  3. Whether the request is MiFID-relevant
  4. Which product are affected

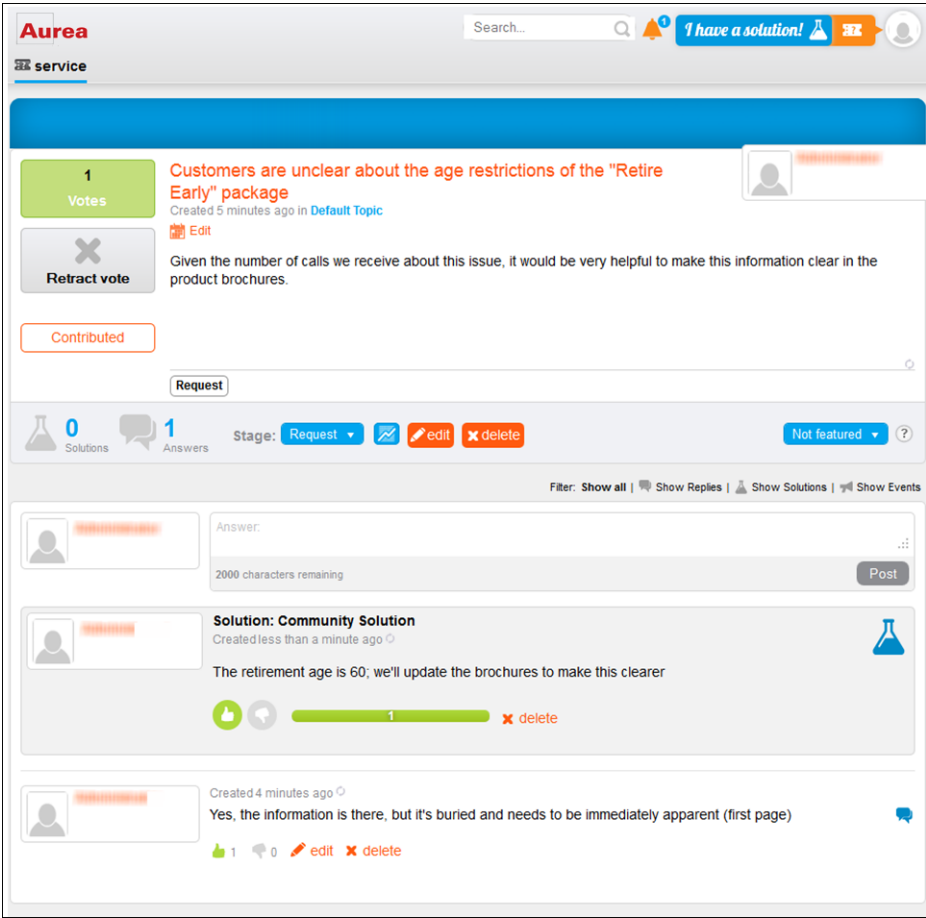
The **Votes** field displays the number of users that have voted for this request.

- **Communication:** In this phase, you can:
  - Click on **+** (**New Community Answer** to post an answer to the community
  - Click on **+** (**New Community Solution** to post a solution to the community
  - Click on **✎** (**Change Community Stage** to change the community stage

Answers and solutions are stored as activities and linked to the person in Aurea CRM web who submitted the original post.




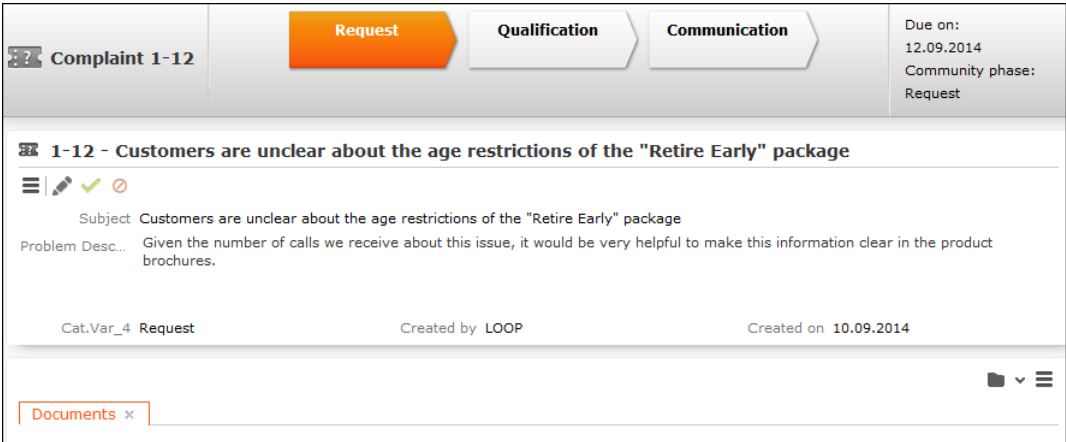
Answers and solutions are automatically posted to CRM.loop.



# Processing CRM.loop Requests

To process a service request posted to CRM.loop:




1. Select  (Service) > CRM.loop Service.
2. Search for and open the service request.



3. Service requests are processed in the following phases:

- **Request:** The subject and a description of the problem are displayed in this phase.
- **Qualification:** In this phase, you can enter data in order to qualify the request, e.g.:
  1. The cause of the problem
  2. A suggested solution
  3. Whether the request is MiFID-relevant
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The **Votes** field displays the number of users that have voted for this request.

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  - Click on  (**New Community Answer** to post an answer to the community
  - Click on  (**New Community Solution** to post a solution to the community
  - Click on  (**Change Community Stage** to change the community stage

Answers and solutions are stored as activities and linked to the person in Aurea CRM web who submitted the original post.



The screenshot displays the Aurea CRM interface for a complaint record. At the top, there are three navigation buttons: 'Request', 'Qualification', and 'Communication', with 'Communication' being the active phase. To the right, the due date is 12.09.2014 and the community phase is 'Request'. Below this, the title of the complaint is '1-12 - Customers are unclear about the age restrictions of the "Retire Early" package'. A search results table is shown below, listing activities linked to the complaint.

Rep	St...	St...	Master Data	Person	Social A...	Commu...	Text
Idee	10...	14:...	dummy	Mr. ab Fab	Problem ...	Request	The retirement age is 60; we'll update the brochu...
LOOP	10...	13:...	dummy	Mr. ab Fab	Problem a...	Request	Yes, the information is there, but it's buried and ...

Answers and solutions are automatically posted to CRM.loop.

**Aurea**  1 have a solution!

**service**

---

**1** Votes

**Customers are unclear about the age restrictions of the "Retire Early" package**  
Created 5 minutes ago in [Default Topic](#)  
[Edit](#)

**Retract vote**

Given the number of calls we receive about this issue, it would be very helpful to make this information clear in the product brochures.

Contributed

Request

---

**0** Solutions **1** Answers Stage: **Request** [edit](#) [delete](#) **Not featured**

Filter: [Show all](#) | [Show Replies](#) | [Show Solutions](#) | [Show Events](#)

**Answer:**  
2000 characters remaining [Post](#)

**Solution: Community Solution**  
Created less than a minute ago [🔬](#)

The retirement age is 60; we'll update the brochures to make this clearer

[👍](#) [🗨️](#) [1](#) [delete](#)

Created 4 minutes ago [🗨️](#)

Yes, the information is there, but it's buried and needs to be immediately apparent (first page)

[👍](#) [🗨️](#) [edit](#) [delete](#)