



Customer Relationship
Management

ISI User Manual

Version 14.1

Notices

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Preface

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.
Bold Fixed-width	Bold Fixed-width 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.
Bold Sans serif	Bold sans serif 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.
Menu > Choice	An angle bracket between two menu items indicates that you should choose an item from a menu. For example, the notation File > > Exit means: "Open the File menu and choose Exit ."
>>	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

Overview

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 of the Aurea CRM web specific to following businesses:

Industry Solutions International (ISI) - Here the business focus is construction and manufacturing sectors in a B2B model. Sales and Services are the primary process focus in ISI.

Life Sciences International (LSI) - Here the business focus is over the counter sales and pharmacy in a B2B and B2C model. The primary process focus in FSI is sales.

Financial Services International (FSI) - Here the business focus is the financial sector in a B2B and B2C model. The primary focus areas are core financial accounting and sales.

This guide 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.

Typographical Conventions

This topic has information about the Typographical Conventions used in the manual.

The following formatting is used in this manual:

- Gray and bold: Menu commands, menu names, titles of dialog boxes, check boxes, radio buttons, info area names, names of fields and buttons are written **like this**.
- Menu commands: "Select **New > New Person** from the context menu" means that you should first select **New** and then **New Person** from the record's context menu.
- Bold: Particularly important information is written in **bold**.

- Keyboard shortcuts: Simultaneous key strikes are identified by placing a plus sign between the key designations, e.g. Alt+D.
- Notes and tips:

Note: Notes and tips are displayed like this in the text.

2

General Functions

Learn about the General functions for Aurea CRM.Web ISI.

Below topics explain the general functions:

Login

Logging in to your Aurea CRM.

You can access data in Aurea CRM according to your user rights. You need to log in with your user name and password. You can change your password later. For further details, see [Changing Passwords](#) on page 55.

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 to you 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. For further details, see [Changing Passwords](#) on page 55.

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. The **Login** page is displayed.

Note: Please ask your administrator for the correct address.



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, see [Roles and CRM Processes](#) on page 15. 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 is used again.

The name of the telephone profile in use is displayed in the system information. For further details, see [System Information](#) on page 56.

To change your telephone profile:

1. Click on **More Options** on the **Login** page to display additional options. 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

Learn about the 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, 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 assigning 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, you can decide which role(s) to log on to the system with, provided you have not been assigned fixed roles.

Example - the head of marketing requires access to marketing data, as well as other data only available to management. For further details, see [Selecting Roles](#).

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 cannot 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, see [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. Suppose, 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. For further details, see [Adding Records](#) on page 72.

User Interface

Your administrator can define the appearance of your user interface.

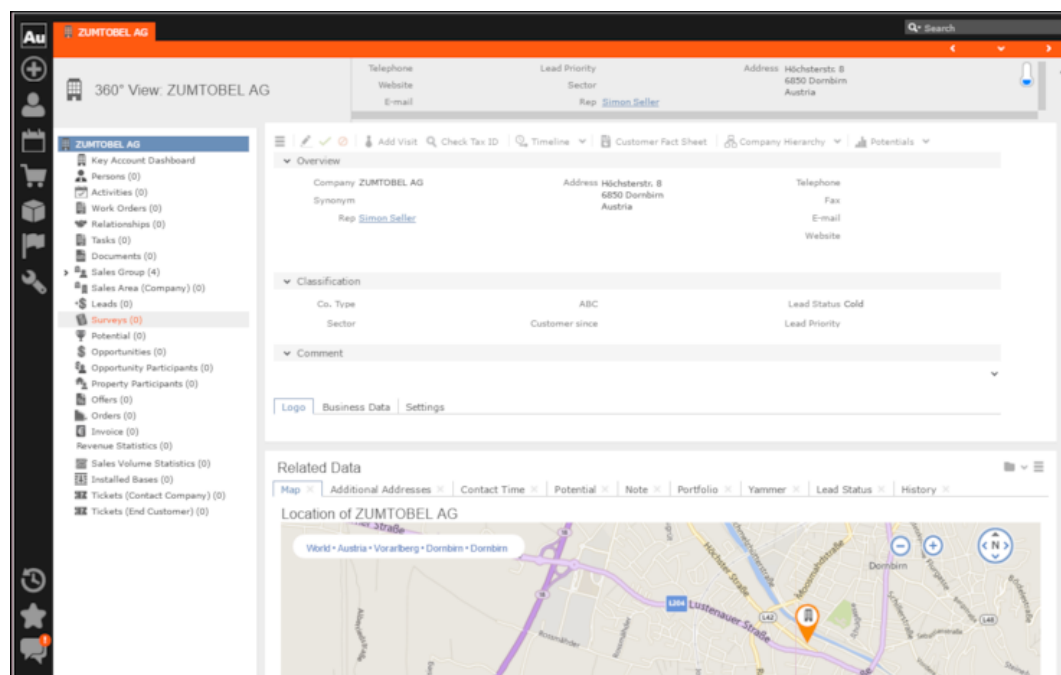
Access can be denied to menu entries, queries can be predefined and much more. Some of the options available to you depend on your access rights. For example, your administrator can determine that you cannot add new records, in which case the appropriate menu options are unavailable. If you cannot add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

Areas

Learn about the areas of Aurea CRM web user interface.

The Aurea CRM web user interface consists of:

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

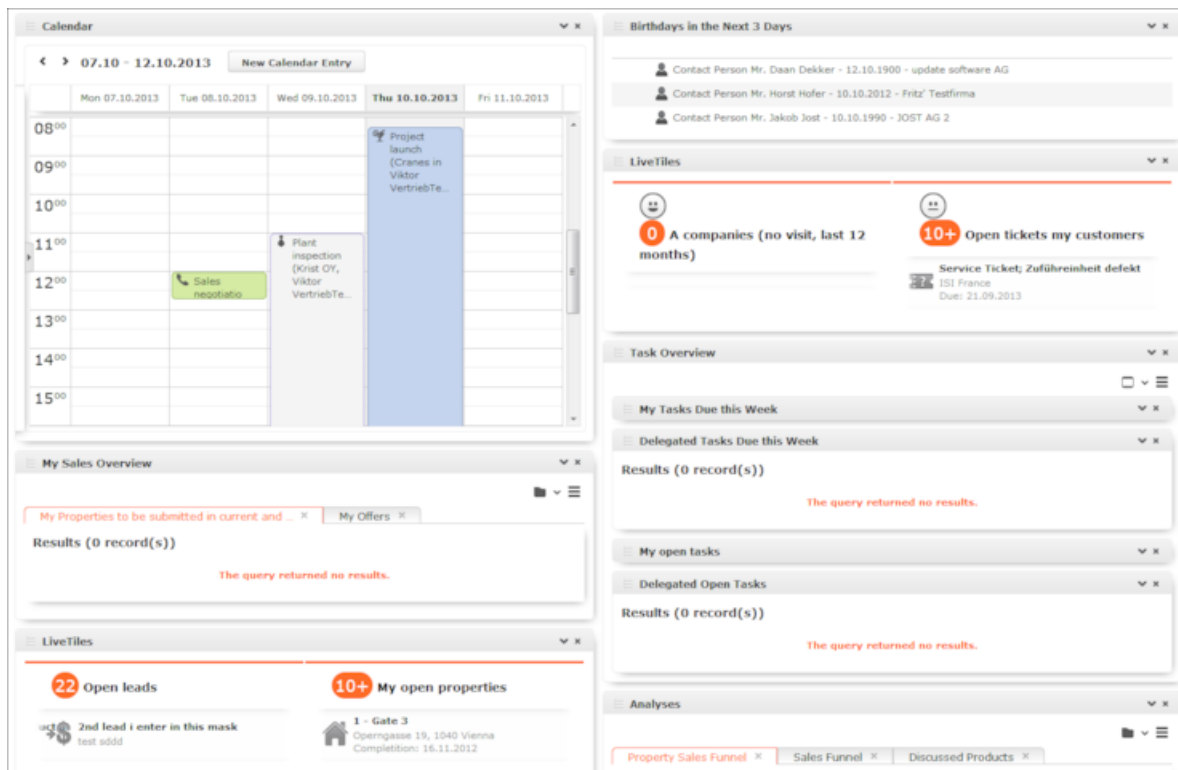


Start Page

Your start page provides you with an overview of the most important information required for your work.

Your start page is displayed once you have logged on.

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. For further details, see [Changing the Order of Elements on the Start Pages and in Related Data](#).

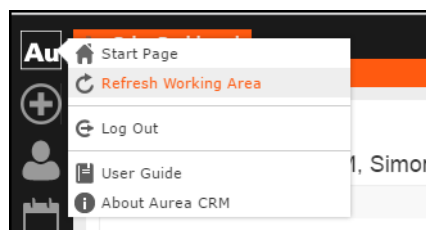
Sidebar

The sidebar is displayed on the left of the screen and a variety of functions can be executed from here.

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:

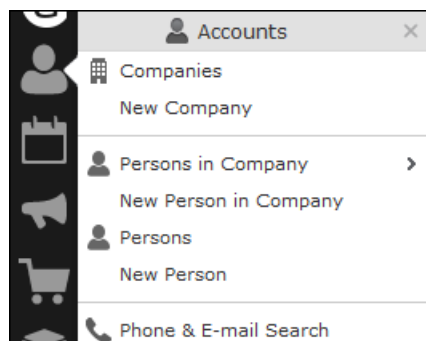


- **Start Page:** Switches to Aurea CRM web's start page.
- **Refresh Working Area:** Refreshes the current screen.
- **Log Out:** Closes Aurea CRM web. For security reasons, always exit Aurea CRM web using this option.
- **User Guide:** Opens the user manual.
- **About Aurea CRM:** Displays information 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 menu 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, see [Handling Tab](#). If you simply close your browser, the history is **not** saved.

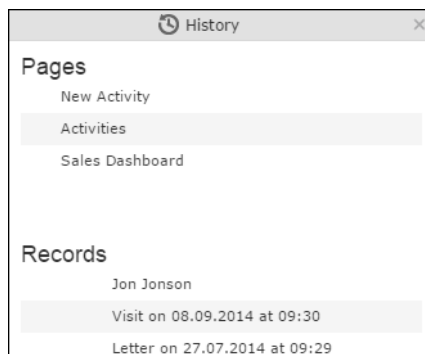
Your administrator defines which entries are displayed in the history:

- 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. For further details, see [Layout Tab](#).

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. For further details, see [Editing, Viewing and Deleting records](#) on page 77.


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 in [Customizing Quick Links](#).

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. You can access the context menu (☰) and quick view (📄) for all entries in the list. Double-click on a record to open it in the default view.
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, see [Searching](#) on page 57.
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 or 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

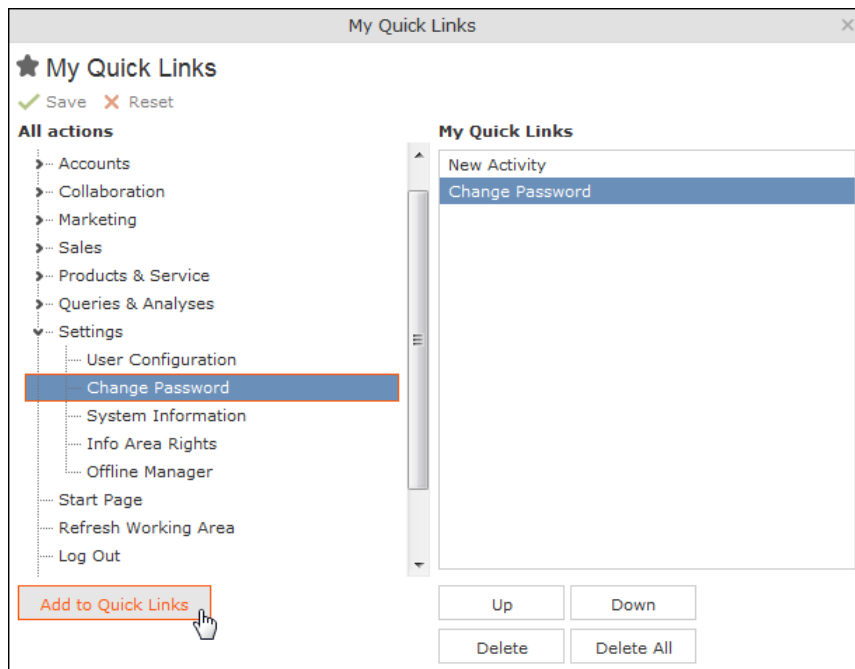
You can add the areas you use regularly to your quick links.

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 **Reset** 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 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, see [Favourites](#).
- From a query's results list, see [Queries](#). [Queries](#) on page 100.
- From your history of recently accessed records or search results, see [History](#).

Buttons

Buttons are available in Aurea CRM web:

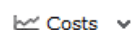
- Buttons are displayed in the working area between the header and the record:



- 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:

« < 16 - 30 of 45+ > »

- 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 (see [Handling Tab](#)):

- **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.

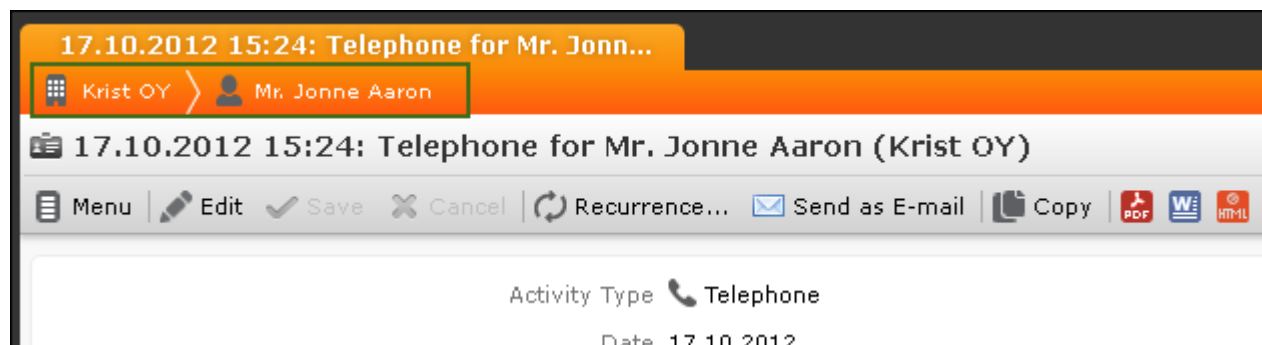
Example: : « < 1 - 20 of 50+ > »

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. For further details, see [Searching](#) on page 57.


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:

A screenshot of a text input field. The field is rectangular with a thin border. Inside the field, the word "Name" is written in a light gray font. To the right of "Name", the text "First name, Last Name" is also written in a light gray font, serving as a hint or ghost text for the user.

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**

Tab view displays the information stored in a record. In addition, child records are displayed under **Related Data**, see [Related Data](#).

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:

📧 **16.09.2013 15:57: E-mail for Mr. Jonne Aaron (Krist OY)**

☰ Menu | ✎ Edit | ✓ Save | ✗ Cancel | 🔄 Recurrence... | ✉ Send as E-mail | 📧 Reply | 📄 | W | 📧

Type <input checked="" type="checkbox"/> E-mail	Status Scheduled
Starts on 16.09.2013	Ends on
Starts at 15:57	Ends at
Priority ★ ★ ★	Create To-Do <input type="checkbox"/>
Result	Private <input type="checkbox"/>
Subject Vertragsbedingungen	

Subject | Details | Links | Marketing Activity | Survey | Activity Details

Rep ID Dominik Landertinger Assigned by Rep ID

Participant ID Required Miranda Meyer ; Dominik Landerting...

Optional John Doe

For Information Chris Aki

Text **Auswirkungen der neuen EU-Richtlinie betr. Import/Export von landwirtschaftlichen Erzeugnissen**

Participants | Parent Data | Related Data

👤 Add Company | 👤 Add Person in Company | 👤 Add Person | ★ Add from Favorites | 👤 Add Linked Person

	T	S	Rep / Person / Company
	!	ⓧ	<u>Mr. Jonne Aaron</u>
	!	ⓧ	Miranda Meyer

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

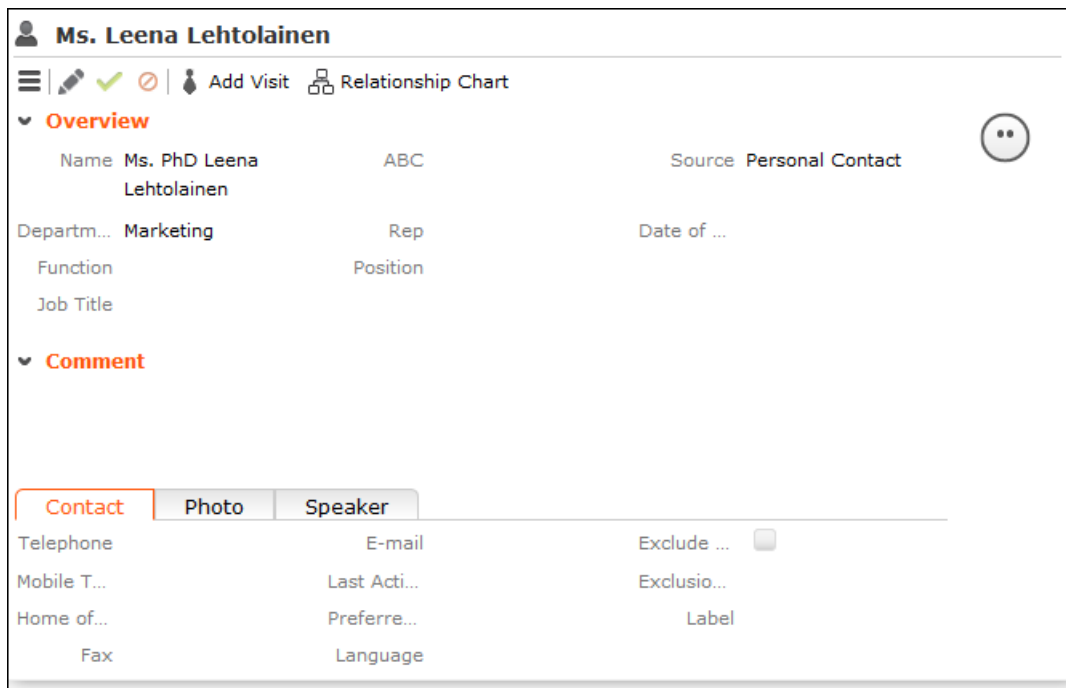
The mask includes a "fixed" mask area containing the most important information, which is always visible. Below this area are several tabs or groups containing various fields.

The lower portion of the mask contains links to related records. Click on a link to switch to the record.

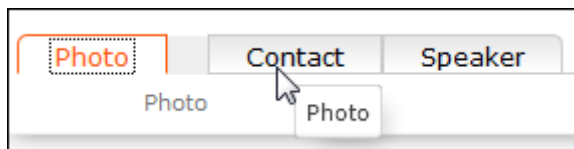
- The **Participants** option is available in some info areas.
- All parent records are displayed under **Parent Data**.
- Click on **Related Data** to access child records. This allows you to quickly view all activities for a person, for example.

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.

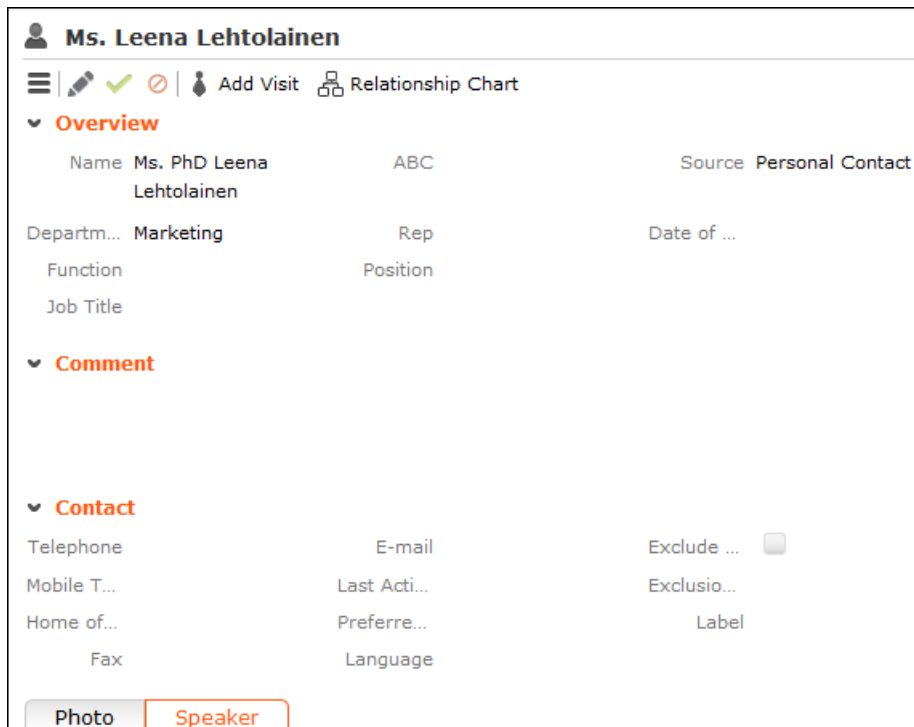
Example:



You can change each tab's position by dragging it to the desired position. The gray marking indicates where the tab is 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:



Note: You can also change the order of the tabs/groups in the **Related Data** area 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**

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

The tree view can depict a multi-tier hierarchy. Example - you can view all the offers stored for a person, and in turn all of the items in these offers.

A separate context menu is available for each info area displayed in the tree view. Use the menu to add new records, or display the records in a list. The appropriate context menu is also available for linked records displayed in the tree view.

Note: All child info areas are displayed in the parent records tree view. For example all records added for a company are displayed in the tree view for companies.

To display the tree view:

1. Switch to the desired record and select **Tree View** from the context menu. The record is displayed in the tree view. Drag the separator between the tree view and details view to change the width of the tree view.

The tree view displays related records in a tree structure. The details of the selected record in the tree are displayed to the right. The breadcrumb trail is also displayed. For further details, see [Breadcrumbs](#).

Example: Tree view for a company:

2. The selected record is highlighted in the tree view. and you can edit the record in the details area, see [Editing Records in Tab View](#) on page 78.

The screenshot displays the '360° View: Company Krist Austria AG'. The left sidebar shows a tree view with the following structure:

- Krist Austria AG
 - Persons (1)
 - Ms. Leena Lehtolainen
 - Activities (1)
 - Visit on 10.10.2013
 - Work Orders
 - Relationships (3)
 - Tasks
 - Documents
 - Sales Group (1)
 - Leads
 - Opportunities
 - Opportunity Participants
 - Property Participants
 - Offers
 - Orders
 - Installed Bases
 - Service Contracts
 - Tickets (Contact Company)
 - Tickets (End Customer)
 - Service Offers
 - Service Reports

The main content area shows details for 'Company Krist Austria AG'. The 'Overview' section includes:


Company	Krist Austria AG	Address	Operngasse 17 - 21	Telephone	
Synonym			1040 Wien	Fax	
Rep	Access denied		Austria	E-mail	
				Website	

The 'Classification' section includes:

Co. Type	ABC	Lead Sta...	Cold
Sector	Custom...	Lead Pri...	


The 'Related Data' section shows a table with the following columns:

Address Type	S...	Posta...	City	Country
Delivery Address				

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.

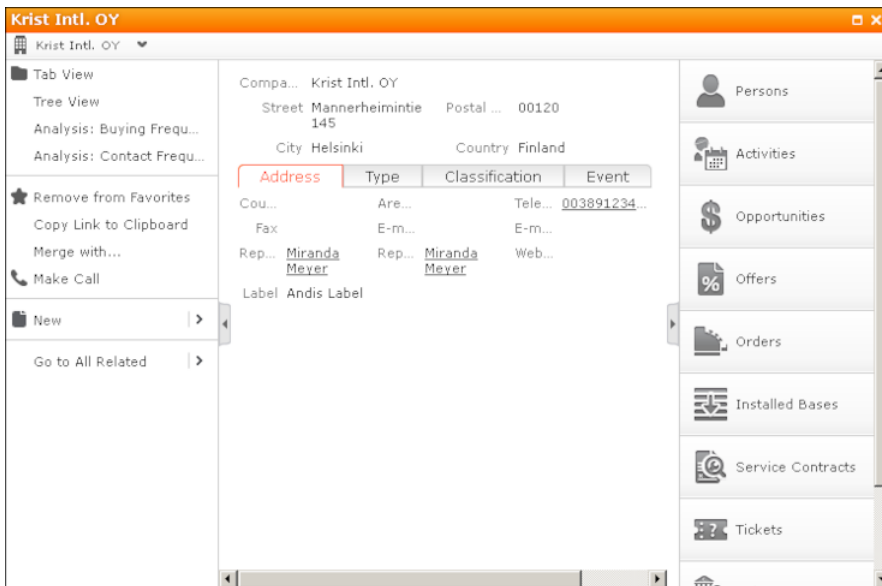
• **Quick View**

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. For example, if you open person entered in a ticket in the quick view, you can then long click on the link to the company in the quick view of the person.



To display the quick view:

1. Either click on  (**Quick View**) in a list or click on a link in a list or on a tab and keep pressing the mouse button ("long click"). The quick view is opened.




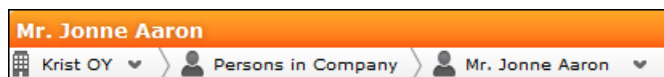
The record's details are displayed in the center (and cannot be edited).

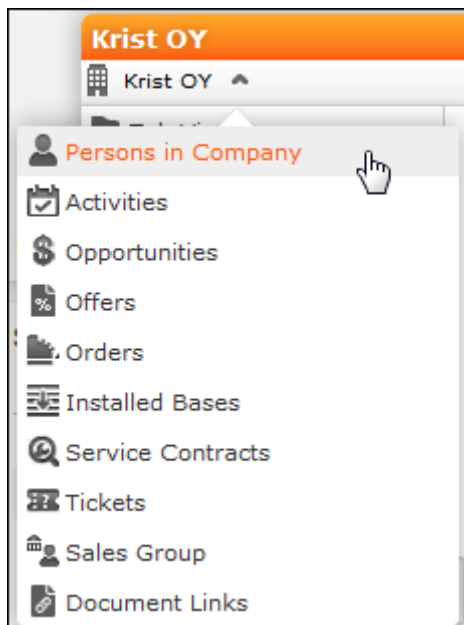
2. If you want to edit the data displayed in the quick view, use the context menu (displayed on the left) to open the records in tab or tree view, for example. You can also add new child records using the menu

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

The breadcrumb trail is also available in the quick view:

- Click on  in the breadcrumb trail to select an info area to display all records added for the current record in that info area. The child records are displayed.
- Click on a record in the breadcrumb trail to display that record's details in the quick view.



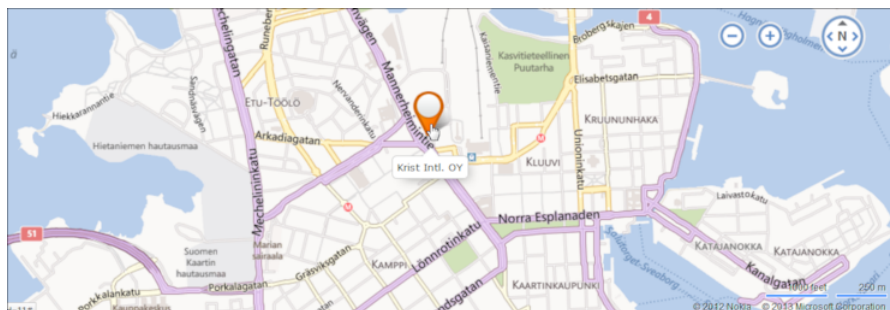


Persons in Company								
Krist OY > Persons in Company								
Display All Records	Last Name	First N...	Function	Departm...	Area Code	Te	Com...	E-mail
	Aaron	Jonne	CEO	Management		1	Krist...	jonne.aaro...
	Krist	Leena					Krist...	leena.krist...

• **Map View**

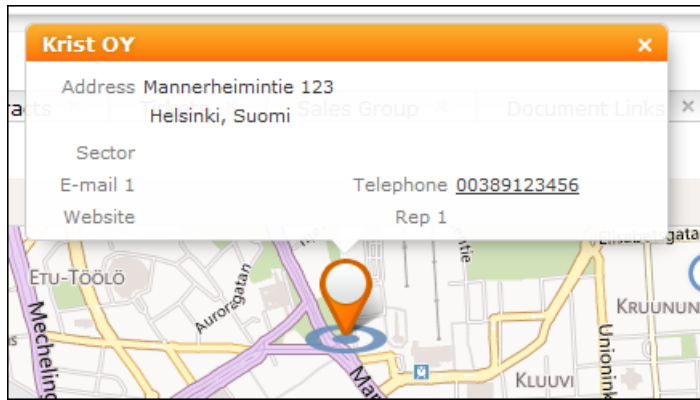
Your administrator can define that locations are displayed on a map, e.g. companies or the address of a property.

Example:



If fields are available that contain geographic coordinates, this data is used to display the location even if the coordinates differ from the address. If no geographic coordinates are available, the address data entered in the database is used to determine the location.

Click on the orange marker to display details concerning the address:






The map view for activities or calendar entries displays records at the location of the person or company the activity was added for.

If a meeting room is added to an activity as a participant, the location of the meeting room is displayed.

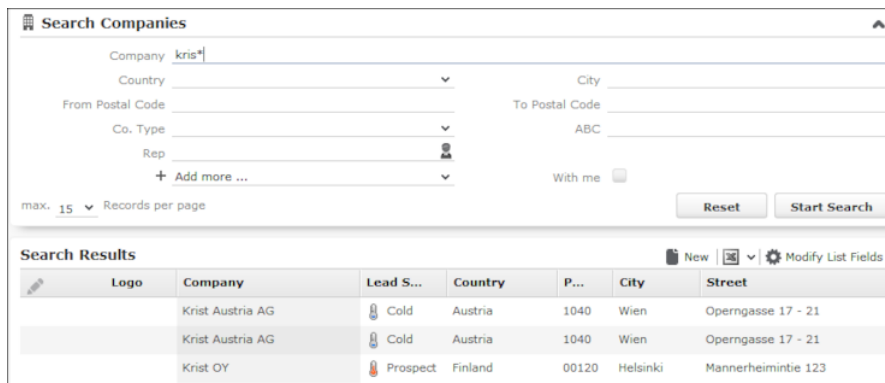
Lists

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

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

-  (**Quick View**): Displays the quick view, see Quick View.
-  (**Show Menu**): Displays the record's context menu, see [Context Menu](#) on page 37.
-  (**Display Details**): Displays the record's details, see below.
- **Result Lists**

The following screenshot shows the results of a search:



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 in lists displayed under **Related Data**, see [Editing Records in List View](#) on page 80.

Switch between pages of results using the arrows above and below the results list (« ‹ 16 - 30 of 45+ › »), see [Navigation Bar](#).

If configured, related data is displayed for the selected record below the results list (e.g. all activities added for a person). Related data is only displayed in those areas where it makes sense to access child info areas, see [Related Data](#).

Double-click on a row to carry out the default action defined by your administrator; in most cases the record is 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 00389123456	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.

Tickets are sorted by the time they were added, but recognizing which tickets have a high priority is not necessarily easy at first glance. Entries with a high priority can be indicated using an appropriate icon or displaying the with a specific background color (e.g. red).

Examples: By default, Aurea CRM web displays an exclamation mark in the **Subject** column for tickets with a "high" priority.

Search Results « ‹ 1 - 15 of 15+ › »						
№	Pri...	Subject	Sta...	Crea...	End Customer Comp...	
978...	Medium	Monitor defekt	Open	23.08.20...	bos1	
297...	High	⚠ Battery time too short	Closed	23.08.20...	Krist Intl. OY	
585...	Medium	Lift steckt	Closed	27.08.20...	ABC 123	

• Total Lines

In some areas, such as analyses and orders, sum totals can be calculated and displayed. For example, if an analysis analyzes the offers in a business area, the sum total of the value of all offers can be displayed.

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

Related Data

The **Related Data** area displays child data beneath the detailed view of a record. You can edit data in sub-lists, see [Editing Records in List View](#) on page 80.

To switch between tabs:

- Using the mouse: Click on the desired tab.
- Using the keyboard: Press Alt+0 to activate the sub-list area. Then press Alt+Number to switch to the desired tab. **Example:** In the following screenshot, the **Offers** tab is the third tab. Use Alt+3 to switch to this tab.

Note: Your administrator can define alternative keyboard shortcuts.

Last Name	Fi...	F...	Depa...	Area...	Company	E-ma...	Tel 2	Private T...	Mobile Tel.
Saariinen	Aino				Krist Intl. OY				
Aaron	Jonne		Research	1212	0... Krist Intl. OY	jonne.aar...		34781318	
Omena	Jorma		Research		Krist Intl. OY				
Lehtolainen	Leena		Research		Krist Intl. OY	leena@ki...			
Ristholinen	Leena				Krist Intl. OY				
Jahonnen	Max		Internal ...		Krist Intl. OY	Max@kris...			3457890

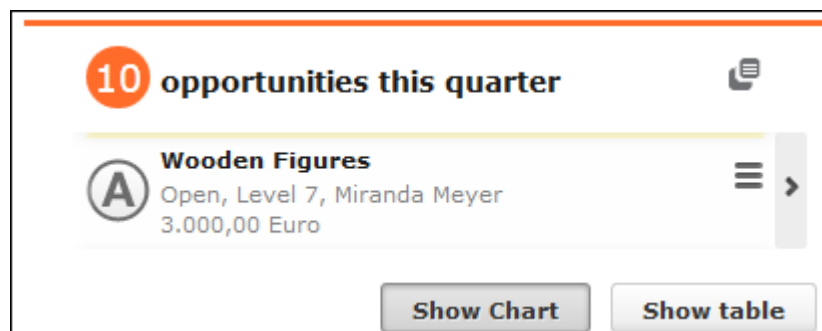
Filter Masks

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. private and corporate customers), or display different contents depending on the situation (e.g. different fields for telephone calls and letters in the **Activity** info area).


Note: 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 ongoing opportunities in the current quarter:



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 one 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.

Once you move the mouse cursor away from the live tile, the live tile begins automatically switching between records again.

- Click on  (**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.

Your administrator can define if the live tile is displayed when no hits are returned by the query.

Displaying Records in Multiple Tabs




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

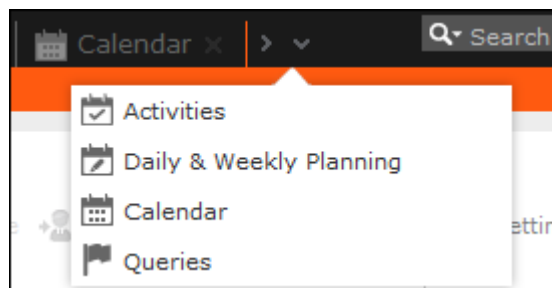
A new tab is opened if:

- You click on a buttons such as **Timeline** when displaying a company.
- You add add new child record in the **Related Data** area (e.g. add a portfolio for a company).
- You hold down Ctrl while selecting a option in the navigation bar or a record's context menu.

Exception: If the calendar is already open, opening the calendar with Ctrl+Click displays the currently opened calendar.

Click on another tab to display its contents.

If you open more tabs than can be displayed on the screen at once (the number depends on your resolution), use the  (**Previous**) and  (**Next**) buttons to scroll. 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:

- (**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.

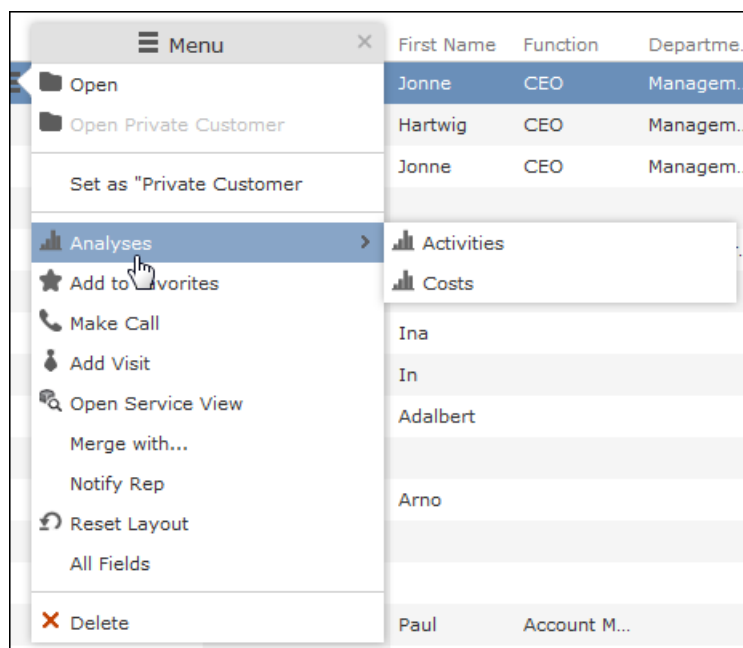
Context Menu

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. For further details, see [Displaying Records in Multiple Tabs](#).

The following screenshot shows the context menu for contact persons:



The contents of the context menu depend 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. For further details, see [Date & Time Tab](#).

Field Types

Learn about the Field Type user interface.

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, see [Displaying Percentage and Catalog Fields Graphically](#).

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

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.

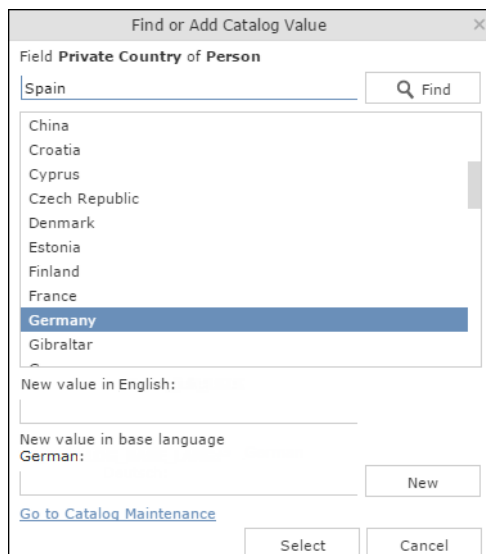
To select an option from a drop-down list:

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' highlights 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.

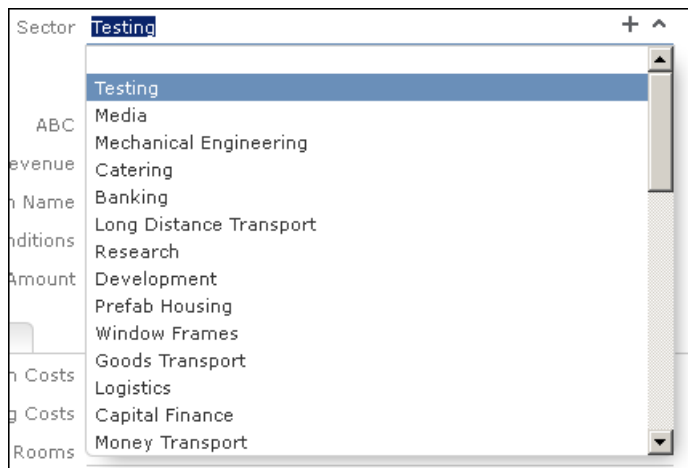
Multiple Catalog Values in a Field

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. For further details, see [Date Picker](#) on page 38.

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

- Digits
- The date separator defined in your user configuration. For further details, see [Date & Time Tab](#).

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. For further details, see [Date Picker](#) on page 38.

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, see [Date & Time Tab](#).
- "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, see [Selecting Reps](#) on page 86.

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.



The screenshot shows a form with three fields, each with a red exclamation mark icon to its left, indicating they are mandatory. The first field is labeled '!Type' and contains the text 'Visit'. The second field is labeled '!Subject' and is currently empty. The third field is labeled '!Starts on' and contains the date '10.10.2013'. Each field has a small downward-pointing arrow on its right side, suggesting a dropdown menu.

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


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.

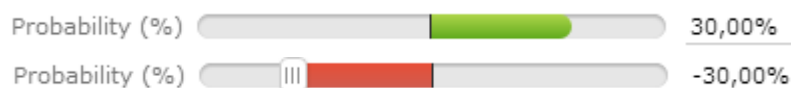
Percentage Field Examples:

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

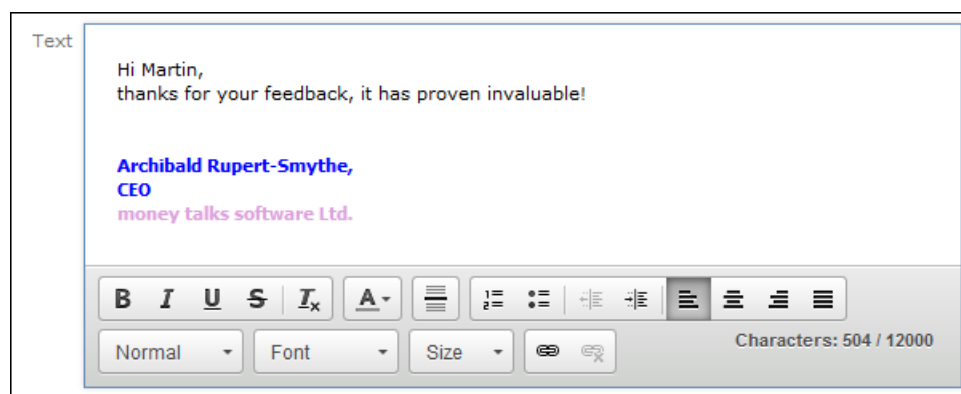
HTML fields allow you to enter and format content using an HTML editor. Your administrator can add HTML fields to info areas.

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

Learn about the Field Help user interface.

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

This topic explains 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 edit.

The screenshot shows a CRM form for an address. The fields are as follows:

Company	Megabucks FC	
Street	Harpers Lane 23	
Postal Code	A92 Q2P	Q X
City	Bigsville	
Country	United Kingdom	+ v
Address Type Classification Event		
Country Code		
Telephone		📞
E-mail 1		✉
Rep 1 ID		👤
Website		🌐

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. For further details, see [Inbox](#).

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 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

Learn about e-mail sending user interface.

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

Learn about notifying reps user interface.

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**, see [Selecting Reps](#) on page 86.
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 remains unchecked.

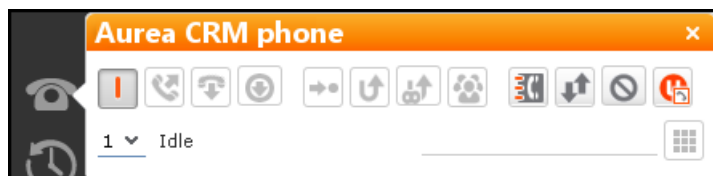
8. Click on  (**Insert Signature**) to include your signature in the e-mail (provided a signature has been defined in your rep record).
9. Click on **Send** to send the e-mail.

Hiding/Showing the CRM.phone toolbar

Learn how to hide/show 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, see [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 page at <https://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

Learn about the Settings General Function.

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

Settings: Learn about 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.

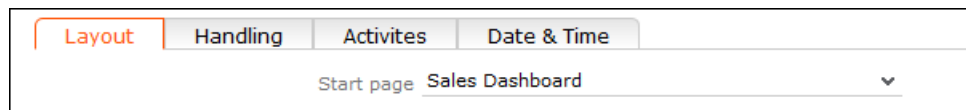
To change your user configuration:

1. Select **Settings > User Configuration** from the menu.
2. Switch to the corresponding tab. The following tabs are displayed:
 - Layout, see [Layout Tab](#).
 - Handling, see [Handling Tab](#).
 - Activities, see [Activities Tab](#).
 - Date & Time, see [Date & Time Tab](#).
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:



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	no value	▼
	Records per page	15	▼
	Records per query step	50	▼
	Check for new records every min.	30	
	Sort order of fields in query and filter designer	Alphanumeric	▼
	Default view for rep selection	List View	▼
Search: Go to details view when search result is one rec...		<input type="checkbox"/>	
New records: Use field values from last data entry	Default (do not transfer the last input)		▼
	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. For further details, see [Navigation Bar](#).
- **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. For further details, see [History](#).
- **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	Activities	Date & Time
Start of work day (hh:mm) <input type="text" value="08:00"/>			
End of work day (hh:mm) <input type="text" value="18:00"/>			
Collision check <input checked="" type="checkbox"/>			
Min. length of displayed activities <input type="text" value="5"/>			
First year in date picker <input type="text" value="1900"/>			
Last year in date picker <input type="text"/>			
First week of the year must contain <input type="text" value="4th January"/>			
Number of days selected when selecting a week <input type="text" value="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 no value ▼
			Date format Server ▼
			Date separator Server ▼
			Year format Server ▼
			Time format Server ▼
			Time separator Server ▼
			Decimal separator Server ▼
			Digit grouping symbol Server ▼
			Time zone Server ▼

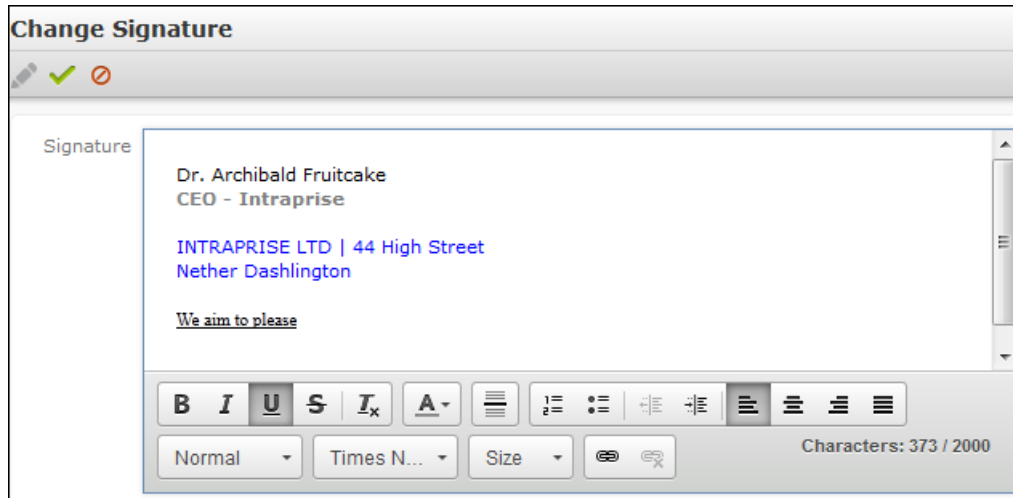
- **Holiday calendar:** Determines which days are displayed as holidays in the calendar.
- **Date format:** Determines how dates are displayed.
- **Date separator:** Determines the character used to separate days, months and years in dates. You can choose between "/", "-", ".", or **Server**.
- **Year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

Changing Your E-mail Signature

Settings: Learn how to change your e-mail signature.

To change your e-mail signature:


1. Select  (**Settings**) > **Change Signature**.
2. Enter your signature and format it, see [HTML Fields](#).
3. Click **Save**.



Info Area Rights

Settings: Learn about the 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

Settings: Learn how to change passwords.

To change your password directly from within Aurea CRM web:

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

Change Password

Old Password

New Password


Retype new Password

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.

Changing Work Hours

Settings: Learn about Changing Work Hours.

To change your work hours:

1. Select  (**Settings**) > **Edit Work Hours**.
2. Enter your work hours.

✓

Individual work hours

	Morning		Aftern...	
Monday	<input type="text" value="10:00"/>	to	<input type="text" value="12:30"/>	<input type="text" value="13:30"/> to <input type="text" value="17:30"/>
Tuesday	<input type="text"/>	to	<input type="text"/>	<input type="text"/> to <input type="text"/>
Wedne...	<input type="text" value="10:00"/>	to	<input type="text" value="12:30"/>	<input type="text" value="13:30"/> to <input type="text" value="17:30"/>
Thursd...	<input type="text" value="9:00"/>	to	<input type="text" value="14:00"/>	<input type="text"/> to <input type="text"/>
Friday	<input type="text" value="10:00"/>	to	<input type="text" value="12:30"/>	<input type="text"/> to <input type="text"/>
Saturd...	<input type="text"/>	to	<input type="text"/>	<input type="text"/> to <input type="text"/>
Sunday	<input type="text"/>	to	<input type="text"/>	<input type="text"/> to <input type="text"/>


If you enter any data, the **Individual work hours** check box is enabled automatically. If this check box is enabled, the work hours entered here are displayed in the resource view and dispatching dashboard. If you disable this check box, the default company work hours defined by your administrator are used instead.

System Information

Settings: Learn about System Information function.

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 (#5)] [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: ,
 Patches: BTBi 8.0.407.46277 (MSSQL)
 Plug-ins:
 update.Lib.Services 8.0.1601.46319
 update CRM Common Library Services
 update.Configuration 8.0.1601.46319
 update CRM designer Configuration Business Logic Layer
 update.Crm.Base 8.0.1601.46319
 update CRM Business Logic Base Layer
 update.Crm 8.0.1601.46319
 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

Learn about the search function in Aurea CRM web.

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.

The search functions are defined in below topics:

Search Area

Learn about the search area function.

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

by selecting  (**Accounts**) > **Companies**):


Search Companies

Company: Krist*
 From PC: + Add more ...
 Country: _____
 To PC: _____
 With me:
 Max. 15 records per page
 Clear Search Criteria
 Reset Search Settings
 Start Search

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

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

Search Companies ▼ A companies

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

Learn how to search 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 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" only delivers 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.

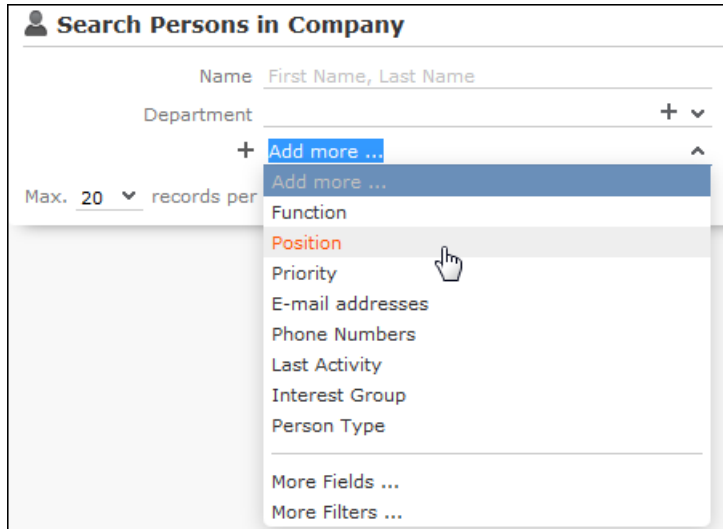
You can define the default number of records per page in the user configuration. For further details, see [Handling Tab](#).

5. Click the **Start Search** button. The results of your query are displayed in the results list below the search area. For further details, see [Results List](#) on page 66.

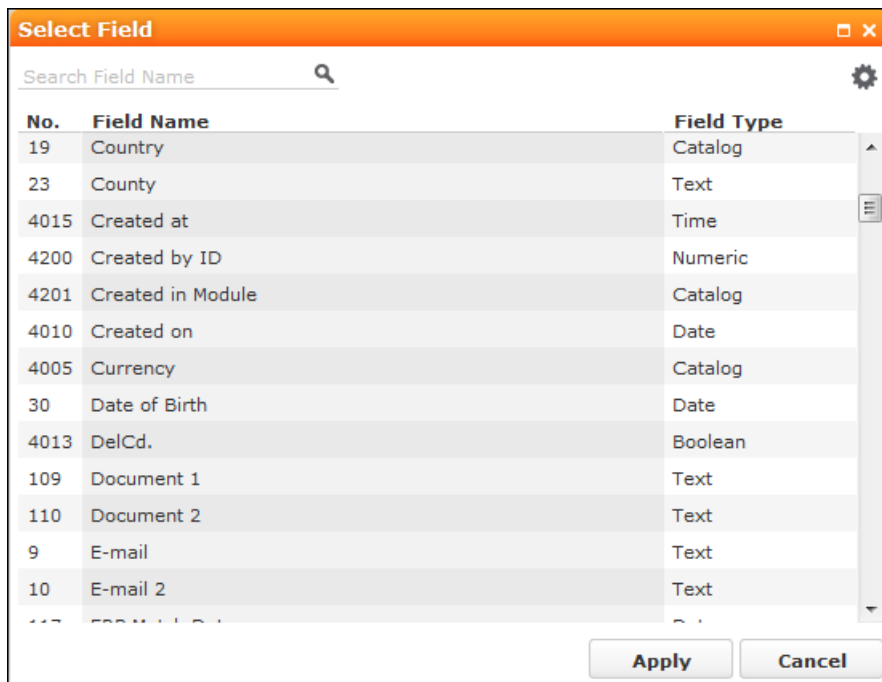
Adding Additional Search Fields

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:

Name First Name, Last Name

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

Search Persons in Company


Name jonne aaron

Department + v

+ Add more ... v

Max. 20 records per page

Search Results

	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.

Search Persons in Company

Name jo,aar

Department + v

+ Add more ... v

Max. 20 records per page

Search Results

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

Searching by Postal Code

You can restrict the search to a specific range of postal codes, e.g. in the company search.

As some countries (e.g. the UK) use combinations of letters and numbers to form postal codes, the **From ZIP** and **To ZIP** fields are alphanumeric.

If you restrict the postal code to a range, the postal codes entered in the two fields must be of the same length, e.g. search for customers with a postal code between 1010 and 1090 (4 characters). Comparing postal codes that contain a combination of letters and numbers can lead to unwanted results.

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, see [Tab View](#) and [Editing Records in List View](#) on page 80.

Child records related to the selected record are displayed under **Related Data**, see [Editing Records in List View](#) on page 80 and [Tab View](#).

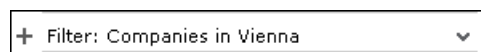
Filters

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.



A screenshot of a search filter dropdown menu. The dropdown is open, showing a single filter option: '+ Filter: Companies in Vienna'. The text is in a standard sans-serif font, and there is a small downward-pointing arrow on the right side of the dropdown box.

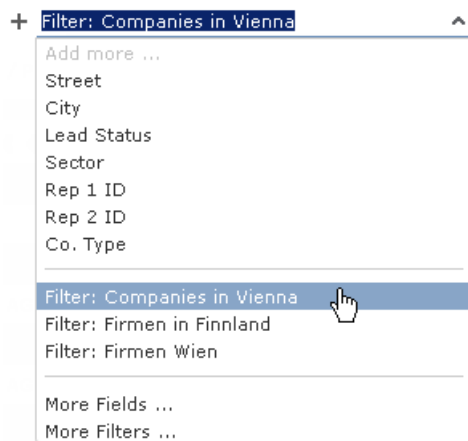
Note: Your administrator can determine that you are not allowed to define filters, but can only select from pre-defined filters.

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.

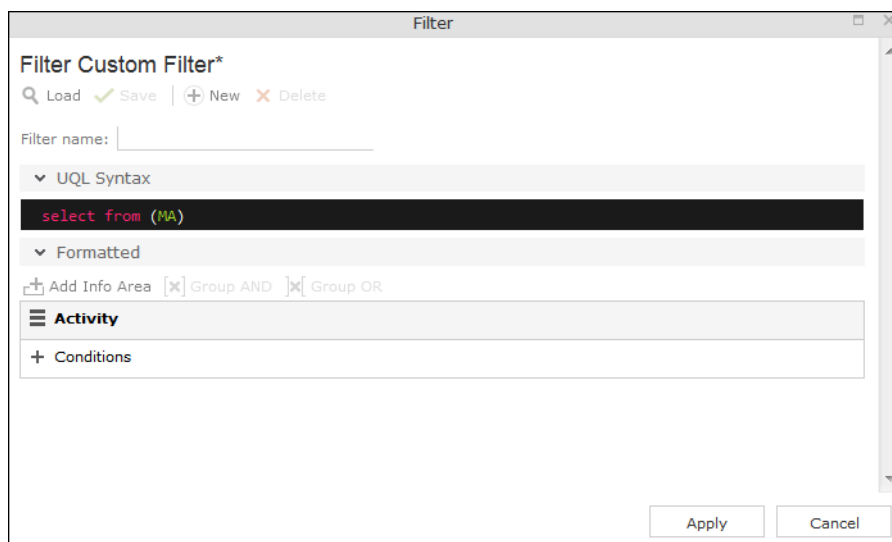


2. Click on **+** (**Add**) to add the filter to the search criteria. The filter is applied when searching.

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. For further details, see [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.

No.	Field Name	Field Type
0	Type	Catalog
1	Status	Catalog
2	Starts on	Date
3	Starts at	Time
4	Duration	Numeric
5	Unit	Catalog
6	Ends at	Time
7	Costs	Numeric
8	Rep ID	Numeric
9	Rep Group ID	Numeric

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).

Enter a condition for the **Type** field in the **Activity** info area.

Field Type

Value:

Available Fields

Telephone
Letter
Event
Fax
E-mail
Info
Internet
Social

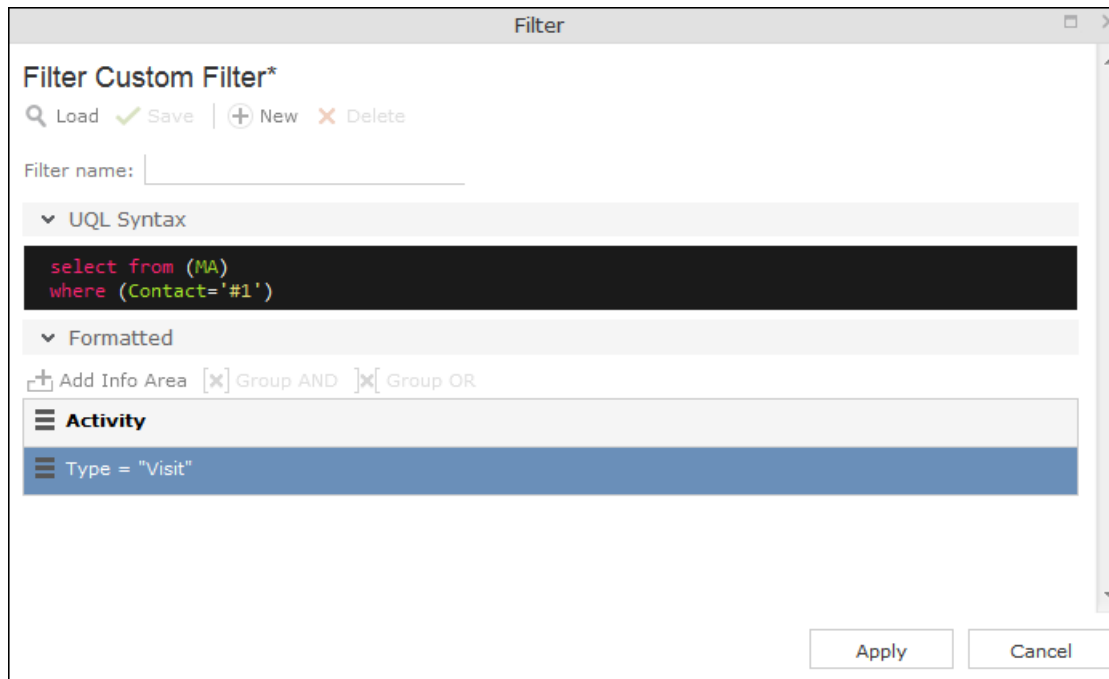
Selected Fields

Visit

- Text fields, see [Conditions for Numeric, Alphanumeric and Time Fields](#)
- Date fields, see [Conditions for Date Fields](#) and [Variable Conditions](#)
- Catalog fields, see [Conditions for Catalogs](#) and [Conditions for Child Catalogs](#)

- Numeric fields, see [Conditions for Numeric, Alphanumeric and Time Fields](#)
- Boolean fields, see [Conditions for Boolean Fields](#)
- Time fields, see [Conditions for Numeric, Alphanumeric and Time Fields](#)
- Rep fields, see [Conditions for Rep Fields](#) and [Variable Conditions](#)

9. Click on **OK**. The filter you have defined is displayed.



10. Define any additional conditions:.

- Click on **≡** next to an existing condition and select **Add Condition** from the context menu.
- 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 is then not 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, see [Selecting Filters](#).
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

Set Quick Search function to enable fast search for desired info areas.

Use the **Quick Search** function at the top right of the screen to quickly search in the most frequently used info areas. Your administrator defines the info areas to which the quick search applies.



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.

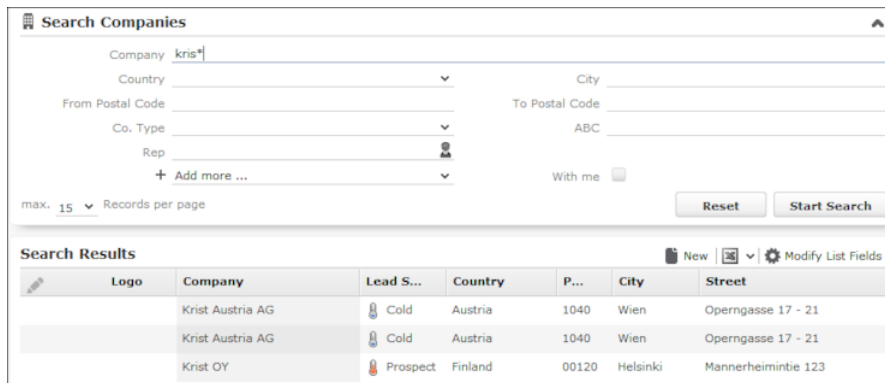


4. The system searches in the info areas where the check box is enabled. Use the check boxes to choose which info areas to search.

Results List

The results of a search are displayed 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.

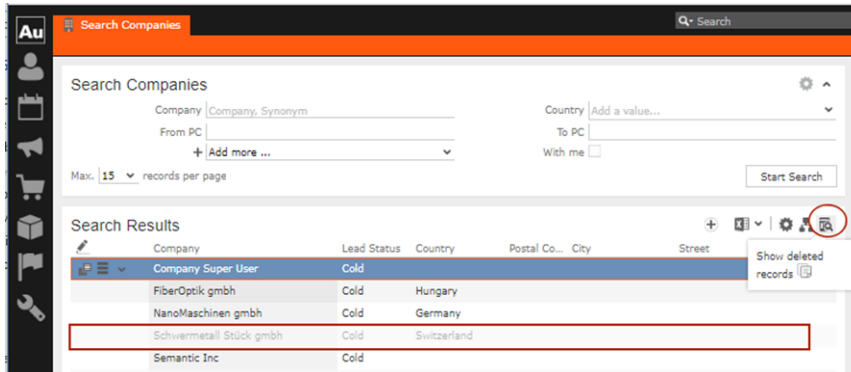


If a query returns more results than can be displayed on a single page, use the navigation bar to scroll through the rest of the list. For further details, see [Navigation Bar](#).

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. For further details, see [Handling Tab](#).

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

Learn about column settings in this topic.

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

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

- 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:

- 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	Street	Phone	Street
1030	Vienna	+43(1) 7876464		Paniglasse 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.

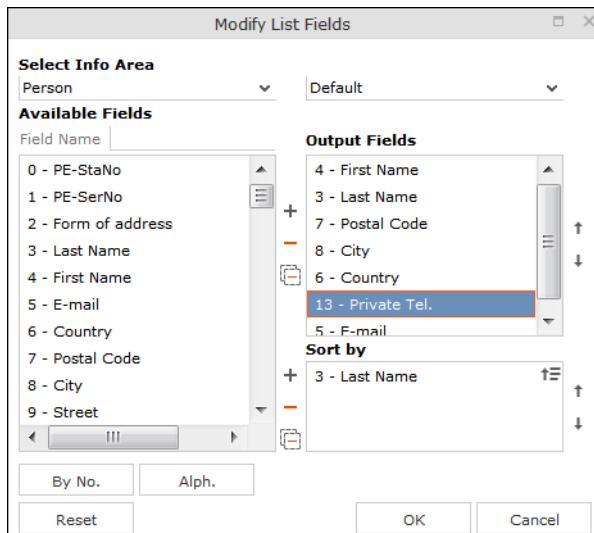
Selecting the Fields in the List

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.



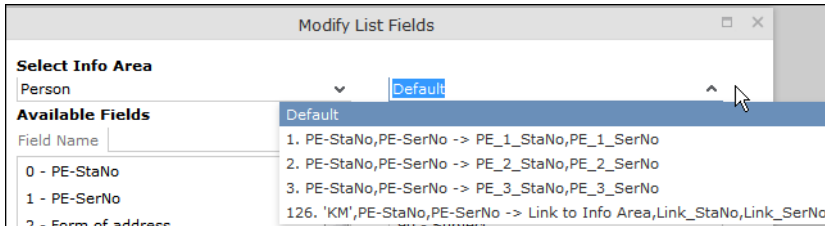
2. Determine which fields to display in the list and the order of the columns:

- **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.

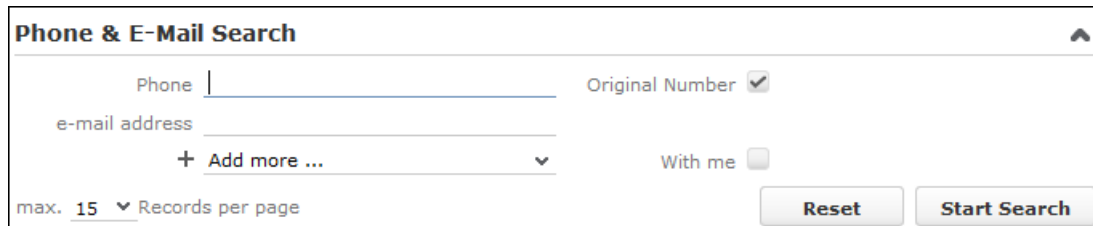
3. Click on **OK** to apply your settings.

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

Telephone and E-mail Search

You can search for telephone numbers and e-mail addresses of companies/persons. To search for companies and persons based on a telephone number or e-mail address:

1. Select  (**Accounts**) > **Phone & E-mail Search**. The telephone and e-mail search opens.



2. Enter the telephone number or e-mail address you want to search for.
3. Enable the **Original Number** check box if you automatically want to add the area and country codes defined to the start of the telephone number.
4. Click on **Start Search**. The hits are displayed.

Note: You need to enter the entire e-mail address when searching for e-mail addresses. E-mail addresses can also contain non-ASCII characters also permitted in domain names (e.g. é).

5. You can edit the record. The context menu contains the same entries as in the company and person searches.

Telephone Number Search Method

Aurea CRM web recognizes whether the number you are searching for is an internal extension, a local number, a domestic number or an international number and completes any missing portions of the number based on your telephone profile settings.

Examples:

100	A short number is interpreted as an internal extension of another rep (the rep must be present as a person in the database). Your country code, area code and your company's telephone number are added to the start of the telephone number.
3334567	Longer numbers without a leading zero are interpreted as local numbers. Your country code and area code are added to the start of the telephone number.

07323334567	A number with a leading zero is interpreted as a domestic number. The leading zero is removed and replaced by your country code.
0049893334567	A number with two leading zeros or a + at the start is interpreted as an international number. The 00 or + is removed.

The number is then searched for in the database. If no person is found, up to 3 digits (by default) are removed from the end and the search is repeated. For example, if an extension is not found, but the company's number is found, the company's is listed instead.

Note: The maximum number of digits that are removed from telephone numbers is defined by your administrator in your telephone profile.

The search ends:

- If a matching number is found
- After the maximum number of digits have been removed (default = 3)
- If the number only has six digits after removing the last digits

Adding Records

Learn to add records to the Aurea CRM database.

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 activities).



Adding new Independent Records

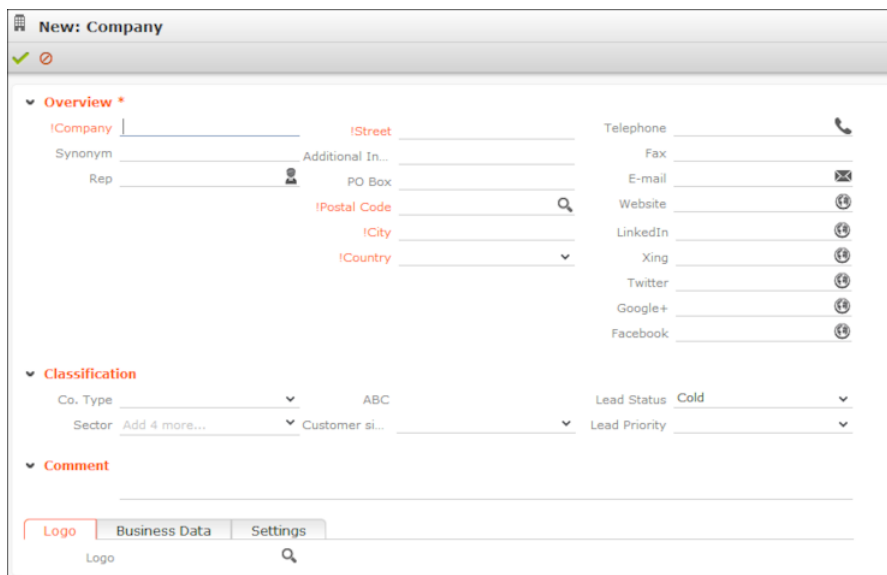
Independent records can be added using the menu options (e.g. **New Company**) or using the **New** button in the list view. The mask used to add new records is displayed.


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. For further details, see [Match-up](#) on page 76.

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**)> **New Company** from the menu to open the search area.
2. Click on **Search**.
3. Click on  (**New**) in company search's results list. The **New: Company** 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, see [Match-up](#) on page 76. The company is displayed in the default view after being saved.

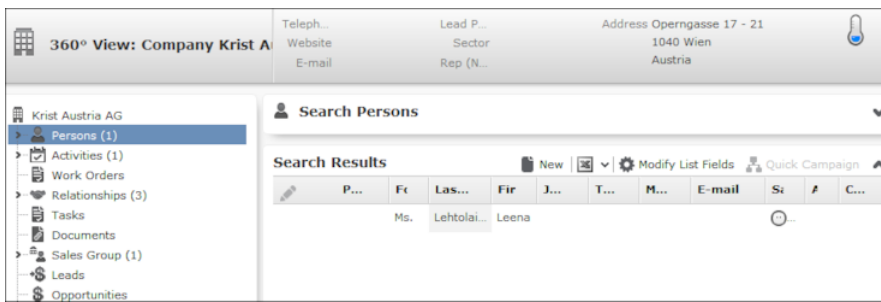
Adding new Child Records

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

- Adding Child Records in the Tree View - You can add new child records from a parent record's tree view, e.g. add 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. **Person**) in the tree. Existing records are listed in the working area.

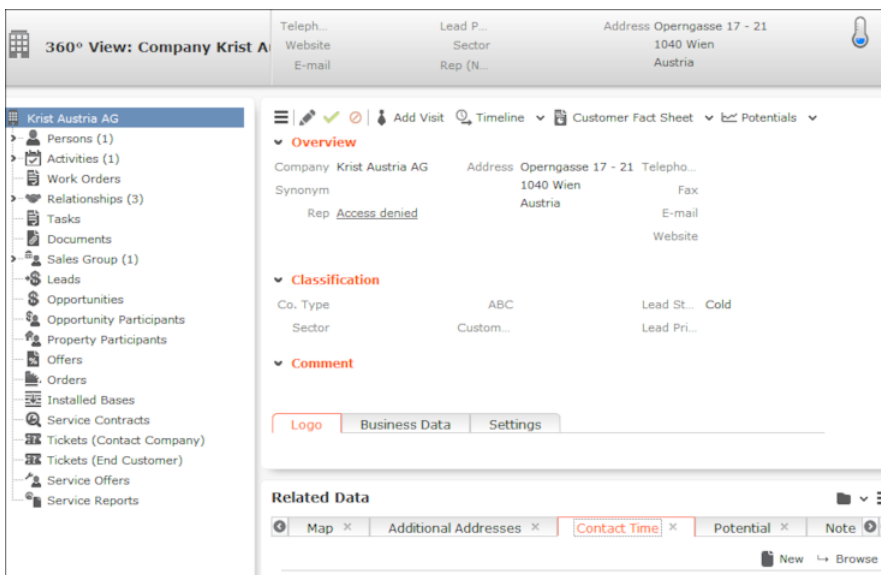


3. Click on **+** (**New**). The input mask is displayed.
4. Enter the data and click **Save**.

- 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 in the **Related Data** area:

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



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


Adding new Records Supported by the System

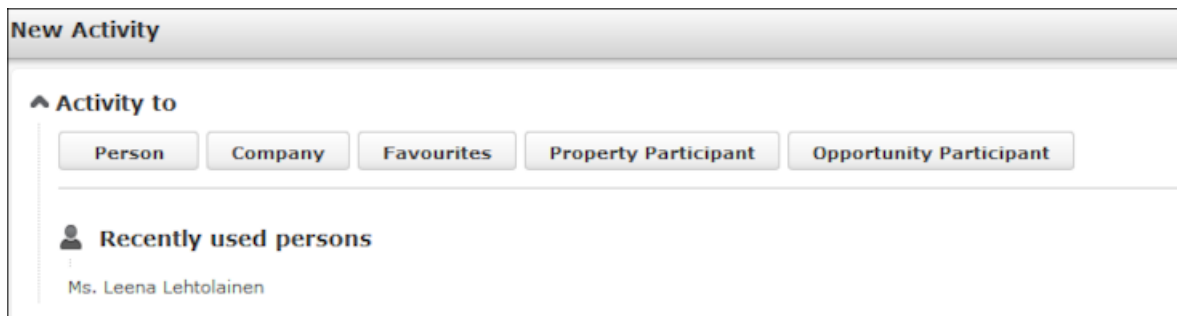
You are guided through the steps of adding new records in various info areas, in particular if new records cannot be added directly due to a lack of information. For example, an activity can only be added if a company or person has been selected.

You are guided through the entire process and the necessary options are provided, e.g. linking an activity to a person.

Example: Adding a new activity

To add a new activity:

1. Select  (**Collaboration**) > **New Activity** from the menu.
2. The **New Activity** process is displayed.



New Activity

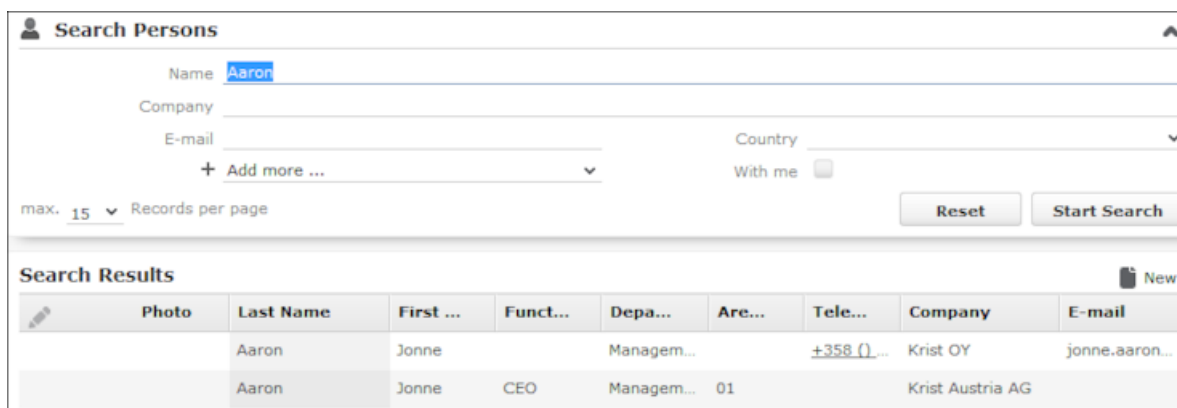
Activity to

Person Company Favourites Property Participant Opportunity Participant

Recently used persons

Ms. Leena Lehtolainen

3. Select the desired parent info area. In this example, we want to add an activity for a person. Click on **Person**. The person search is displayed, allowing you to search for the desired record.
4. Search for the desired person.



Search Persons

Name

Company

E-mail

Country

+ Add more ...

With me

max. 15 Records per page

Reset Start Search

Search Results New

Photo	Last Name	First ...	Funct...	Depa...	Are...	Tele...	Company	E-mail
	Aaron	Jonne		Managem...		+358 ()...	Krist OY	jonne.aaron...
	Aaron	Jonne	CEO	Managem...	01		Krist Austria AG	

5. Select the type of activity and click on **Select**.
6. Enter the desired data, for example any additional participants and click **Save**.

Match-up

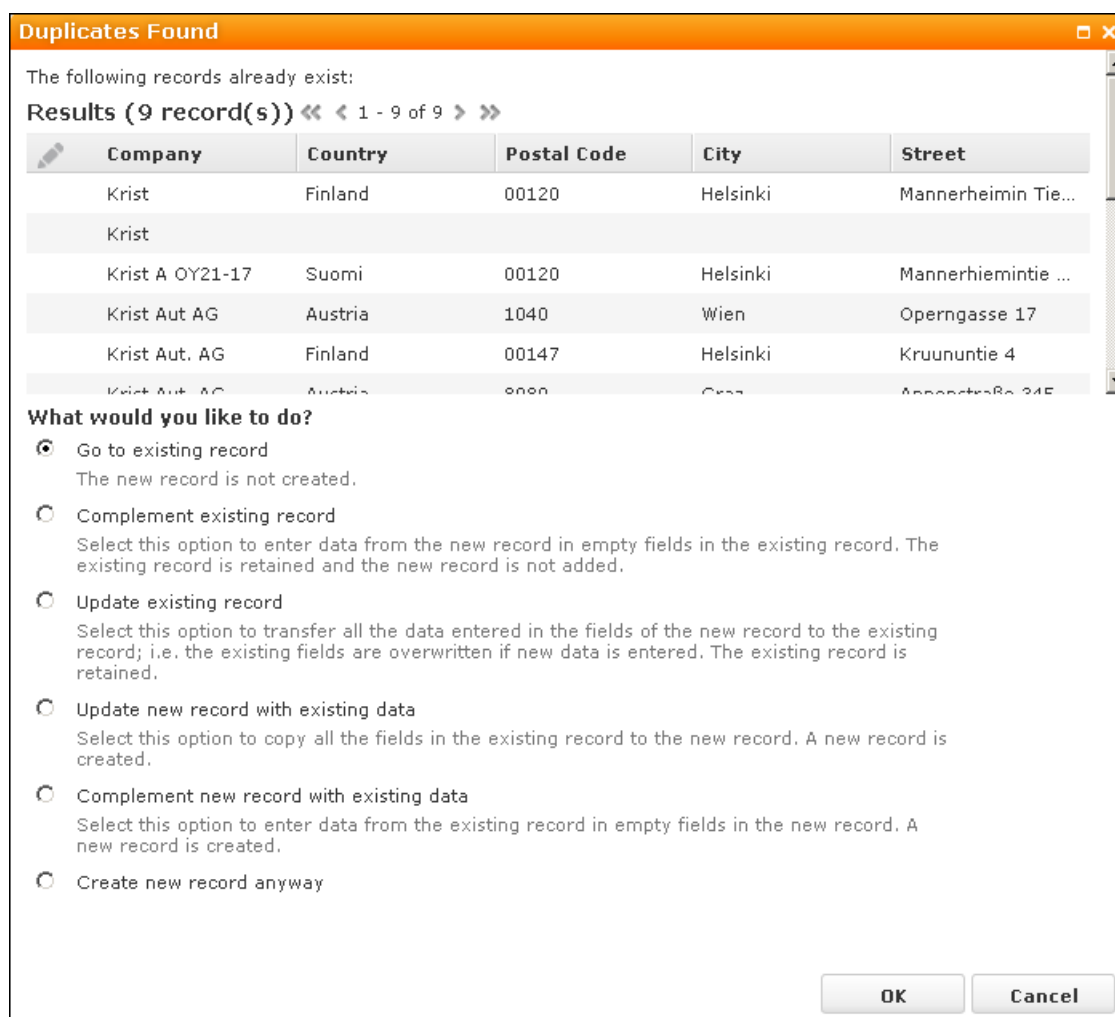
To prevent duplicate records from being added to the database, new records are matched up with existing records in the database.

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. For further details, see [Navigation Bar](#).

Select one of the available actions (**What would you like to do?**) and click on **OK**.

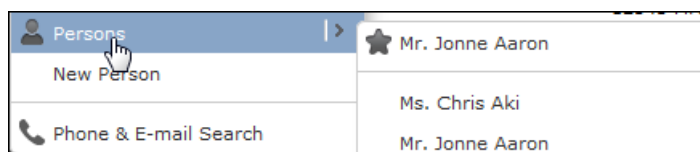


Editing, Viewing and Deleting records

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. For further details, see [Favorites](#) and [History](#).



You can edit records in list and tab view. You are asked to confirm the deletion of records, see [Editing Records in List View](#) on page 80, [Editing Records in Tab View](#) on page 78 and [Deleting Records](#) on page 83.

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

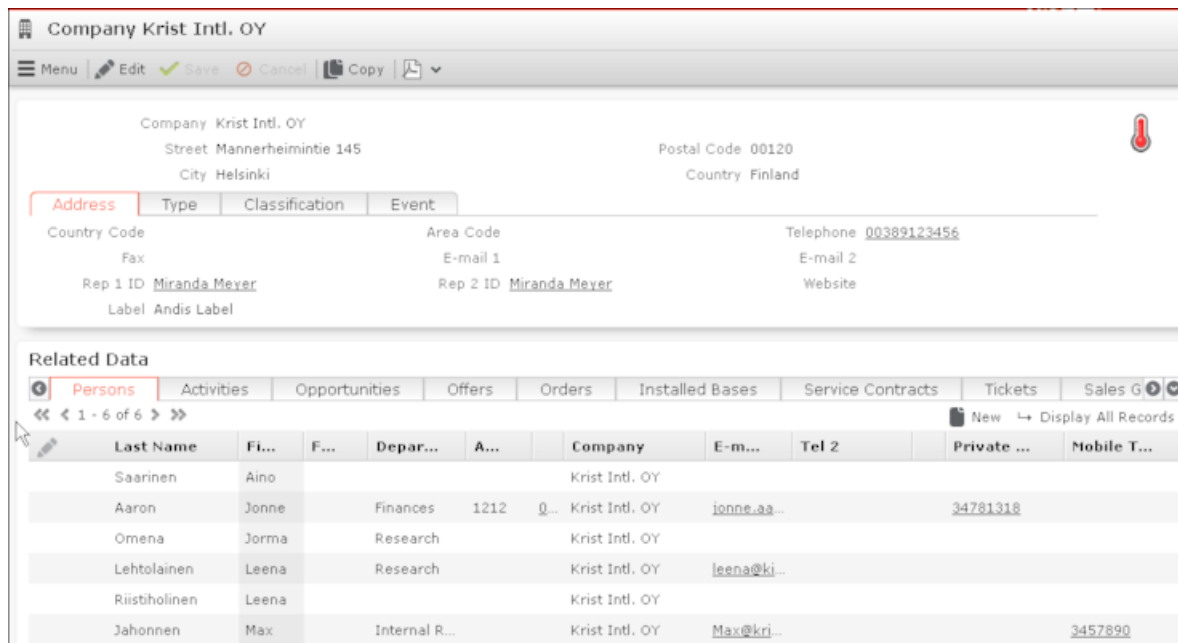
Learn to edit records in Tab view.

To edit data in tab view:

1. Select the record you want to update in the results list.
2. Open the record (by double-clicking or using the context menu).

Note: If configured accordingly, the record is displayed below the results list.

3. The record is displayed in the tab view. You can now update the record or simply view the details in the tab view.



Company Krist Intl. OY

Street Mannerheimintie 145 Postal Code 00120
City Helsinki Country Finland

Address Type Classification Event

Country Code Area Code Telephone 00389123456
Fax E-mail 1 E-mail 2
Rep 1 ID Miranda Meyer Rep 2 ID Miranda Meyer Website
Label Andis Label

Related Data

Persons Activities Opportunities Offers Orders Installed Bases Service Contracts Tickets Sales G

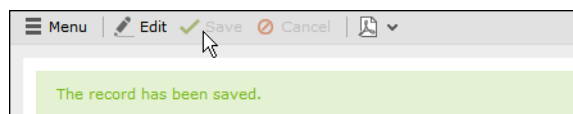
<< 1 - 6 of 6 >>

Last Name	Fi...	F...	Depar...	A...	Company	E-m...	Tel 2	Private ...	Mobile T...
Saarinen	Aino				Krist Intl. OY				
Aaron	Jonne		Finances	1212	0... Krist Intl. OY	jonne.aa...		34781318	
Omena	Jorma		Research		Krist Intl. OY				
Lehtolainen	Leena		Research		Krist Intl. OY	leena@ki...			
Riistiholinen	Leena				Krist Intl. OY				
Jahonnen	Max		Internal R...		Krist Intl. OY	Max@kri...			3457890

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. For further details, see [Inbox](#).

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 your 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.

Navigating with the Keyboard in the Tab View

You can use your keyboard to navigate in tab view.

When switching to edit mode, the cursor is moved to the first field that you are permitted to edit. Use the Tab key to move to the next field. The cursor also moves to buttons in fields (e.g. the telephone icon).


Use Esc to exit edit mode.

The Tab key navigates from left to right. If multiple values are entered in a combined field, the Tab key navigates through all entries.


Editing Records in List View



Learn to edit 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, see [Catalog Fields \(Drop-down Lists\)](#).
- Select reps from the dialog box, see [Rep Fields](#).
- Use the small calendar to enter dates, see [Date Fields](#)
- Click on  (**Select**) next to a link field to select a record in another info area, see [Link Fields](#).

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, see [Selecting Multiple Records](#).
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, see [Selecting Multiple Records](#).
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.

Navigating with the Keyboard in Lists

You can use your keyboard to navigate in lists.

- **Tab**: Move the cursor to the next field (edit mode only)
- **Up/Down cursor keys**: Move to the previous next row or select catalog values.
If the current field accesses a catalog, use Ctrl+Up/Down to move to the previous/next row instead.
- **Enter**: Save the record or select the current catalog value.

Note: Changes are automatically saved when moving to the next or previous row.

- **Esc:** Exit and edit mode and cancel any changes to the current record.

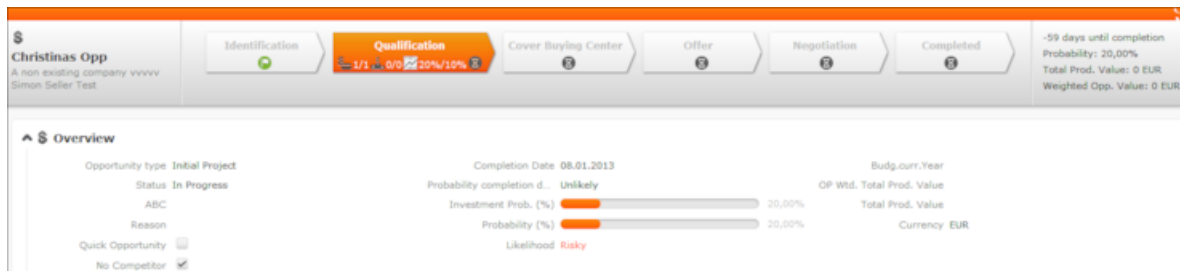
Editing Data in Predefined Processes

Learn to edit data in Predefined Processes.

Predefined processes are available to add or edit data in certain info areas. For example, opportunities progress through a number of phases which differ by industry and the business processes in your company.

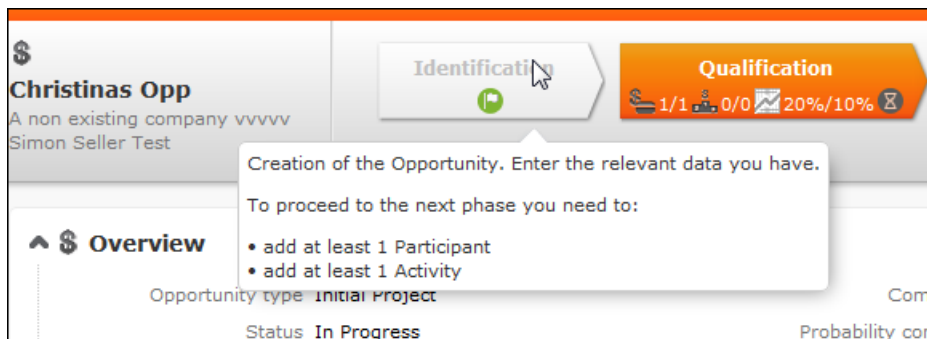
A process is divided into individual phases and tasks are assigned to these phases. Some of these tasks can be mandatory, which means that the opportunity cannot proceed to the next phase until these tasks have been completed. Opportunities tend to be structured in phases such as identification, qualification,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

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



Depending on the process, you can either switch back and forth between phases or can only proceed to the next phase once you have completed all the necessary steps.

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



Metrics can be displayed for individual phases (in the arrows) as well as for the entire process (on the far right). These metrics provide feedback on key data relating to the process.

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



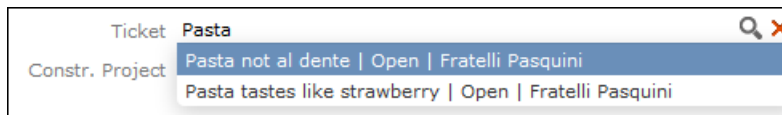
Linking Records

This topic explains 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.

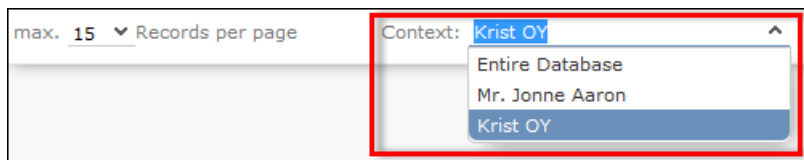
To search for the linked record:

- 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

This topic explains deleting a record.

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

This topic explains Copying a 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

Learn how to display 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 **Customer 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 thus contains 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 people that manage data in the CRM system.

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

Learn how to select 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.

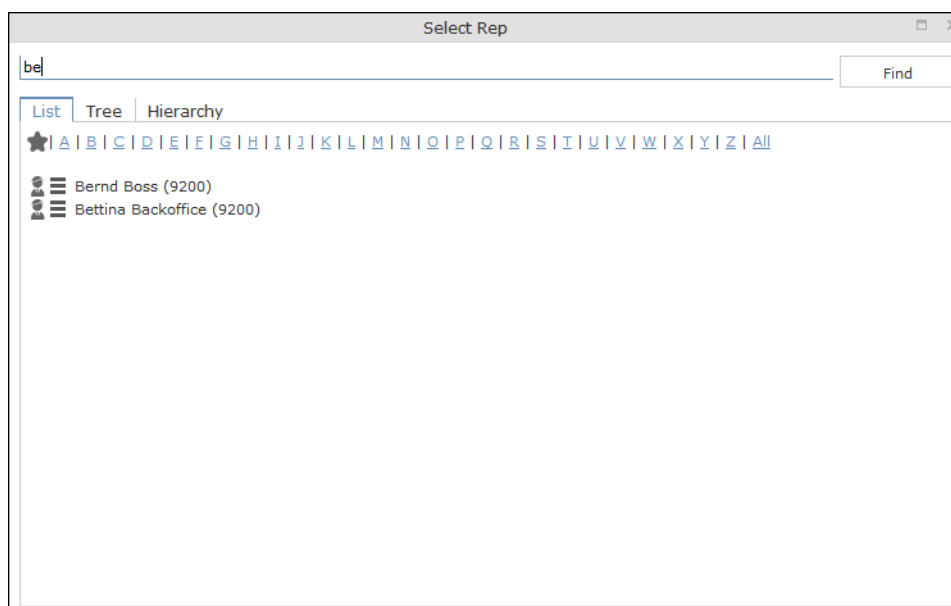
Inactive reps or rep groups are displayed in light gray. Inactive reps can only be selected for the following functions: search, conditions, queries, analyses and in the resource view.

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.

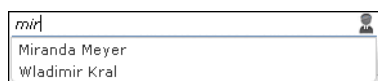
Selecting Reps with the "Find as you type" Function

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.




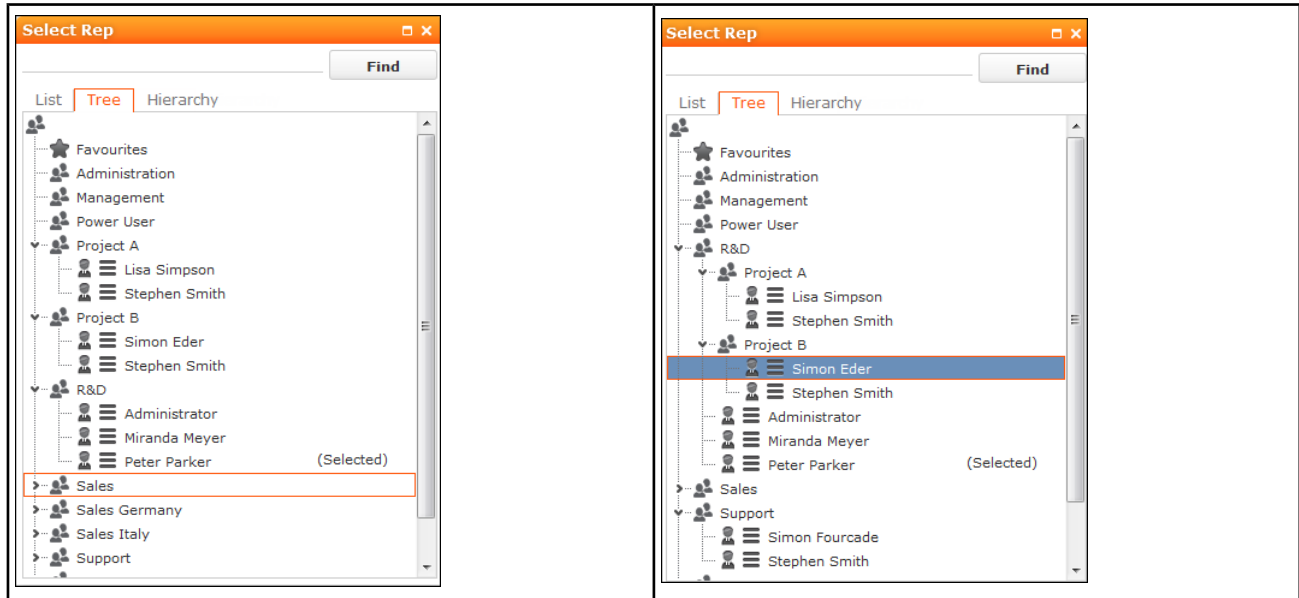
If only one match is returned, the name of the rep is automatically completed.

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.
2. Click on the **Tree** tab.




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

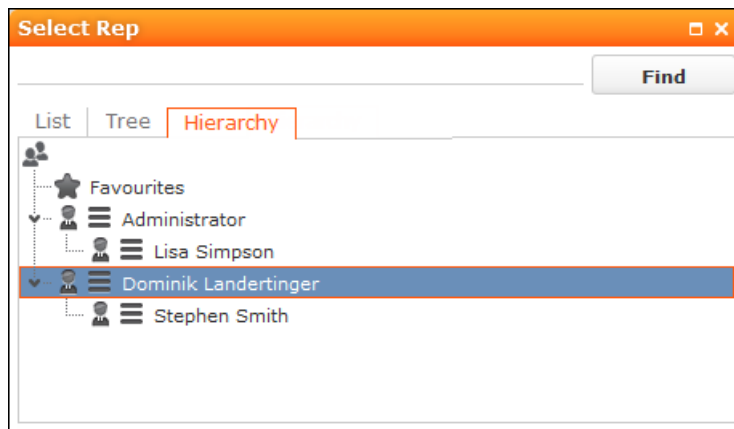
Selecting Reps in the Rep Hierarchy

The hierarchy view displays reps in accordance with your internal hierarchy. Each rep is listed under their immediate superior (as defined using hierarchy codes by your administrator). Your administrator can determine that reps without a superior are grouped in the "Unassigned" group.

Note: Your administrator needs to enable the hierarchy view for it to be available.

To select a rep in the hierarchy view:

1. Click on  (**Rep**) to the right of the field. The **Select Rep** dialog is displayed.
2. Switch to the **Hierarchy** tab. Reps are displayed below their immediate superior in the hierarchy.
3. Click on **>** (**Expand**) or **<** (**Collapse**) to expand or collapse the tree.



4. Double-click on the desired rep or choose **Select** from the context menu to transfer the rep to the rep field.

Rep Favorites

Learn how to set certain Rep as favourite.

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:

1. Search for the rep.
2. Select **Add to Favorites** from the context menu. The rep is now added to your favorites, and is displayed in the **Favorites** group.

Participants and Roles

Learn about participant's and roles assigned to them in Aurea CRM.

Participants can be added to records in several info areas in Aurea CRM web, e.g. to tickets, service contracts, installed bases, properties, opportunities etc. The participants are assigned roles, e.g. as a contact person or end customer. Depending on the info area the participants are added to, additional information can be entered, for example you can enter the attitude or position of an opportunity participant.

Your administrator is responsible for determining which participants are added automatically to which info areas.

Different roles can be defined for participants. Some roles are predefined in the default version, e.g.:

- Ticket: Contact partner, end customer and billing address
- Service Contract: Billing address and service contractor
- Installed Base: Location

Participants can also be added to properties, opportunities, offers, orders, offer items, order items, service contract items and installed base items.

For example, if you assign a ticket participant the role of contact partner and uncheck **Inactive** (i.e. set the participant to active), the participant is automatically entered in the **Contact Company** or **Contact Person** field in the ticket.

If you add a further ticket participant with the same role of contact partner, the previous participant is not removed. The previous contact partner continues to be displayed, however the **Inactive** check box is enabled indicating that the participant is no longer active. The values in the **Active from** and **Active to** fields are entered automatically based on when the **Inactive** check box is enabled or disabled. This allows you to track who was active in which role in which process.

Depending on the info area, newly added participants are automatically set as the active participant in that role, i.e. the **Inactive** check box is unchecked.

Your administrator can define how roles and participants are handled in Aurea CRM web:

- Which roles are available in which info areas
- Whether participants are automatically transferred to child info areas
- Whether you are allowed to add participants
- etc.

In the default version of Aurea CRM web, all participants entered for a service contract are also automatically copied to service offers along as any items.

You can delete individual participants.

Adding Participants

To add a new participant:

1. Switch to the record (e.g. ticket, service contract, installed base, opportunity, offer, order) you want to add a new participant to.
2. Click on **+** (**New Participant**) on the **Participants** tab under related data or select **New > Participant** from the context menu. The **New Participant** wizard is started.
3. Choose whether to add a company, person or record in your favorites as the new participant. Once you have selected the desired record, enter the participant's role.
4. Depending on the info area you are adding the participant to, you can enter additional information concerning the participant, e.g. their position at their company.
5. Depending on the info area the new participant is displayed in the list of participants and is set to the active participant for the selected role. If another participant was previously assigned to this role, the **Inactive** field is enabled in the previously assigned participant record, setting the previous participant to inactive.

Note: Only one participant can be active in a specific role. Your administrator can determine whether you are allowed to add additional participants.

Changing the Status of Participants

Participants (e.g. in tickets, service contracts or installed bases) may change over time, for example if a contact person leaves the company they work for.

By setting participants to inactive, the participant continues to be stored and can later be set to active again if necessary.

To change a participant's role:

1. Switch to the desired record and switch to the **Participants** tab.
2. Enable the **Inactive** check box in the list view for those participants whose status you want to change, see [Editing Records in List View](#) on page 80.
3. Disable the **Inactive** check box for the participant who should be set as the active participant in their role.

Note: Only one participant can be active in a specific role. Your administrator can determine whether you are allowed to add additional participants.

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 ^[101] **(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 are 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 are no longer displayed correctly.


Applying Default Values

To apply a previously defined set of default values:

1. Click on ^[101] (**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 ^[101] (**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.

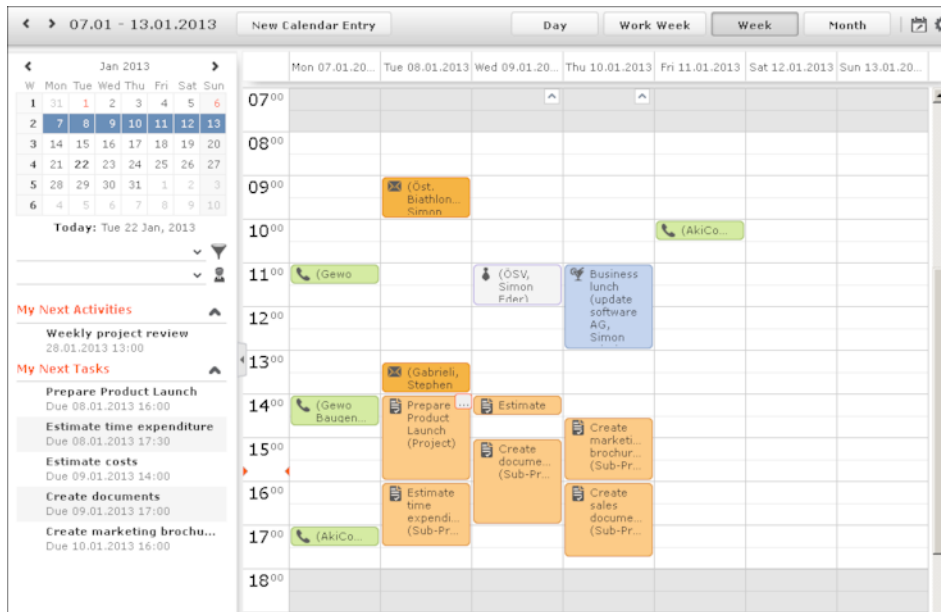
Calendar

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

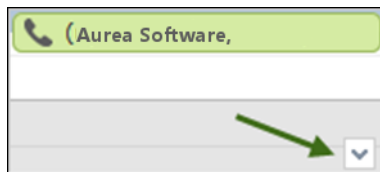
You can define which holidays are displayed in your calendar, the data displayed in the left sidebar etc. in the user configuration. For further details, see [User Configuration](#) on page 50.

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.

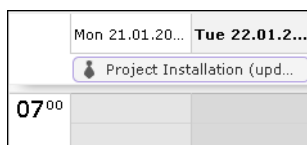
The calendar in Aurea CRM web contains the following elements:



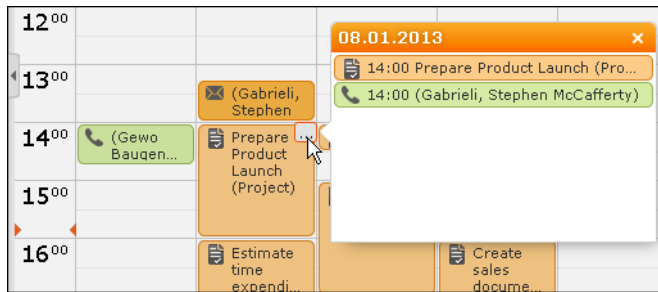
- Different types of appointment are indicated using different icons (for telephone calls, visits etc.).
- You can determine that certain entries are color-coded, e.g. based on the type of appointments or status (⚙️ **Edit Settings**).
- Click on the entries in the header to determine whether to display a **Day**, **Work Week**, full **Week** or **Month** in the calendar.
- The orange cursor in the time bar indicates the current time. **16⁰⁰**
- 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:



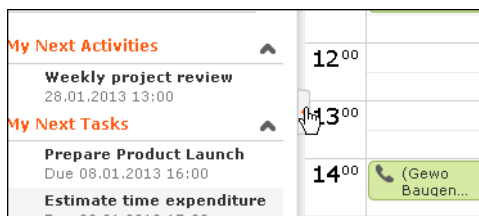
- Appointments lasting all day or spanning several days are displayed in a bar at the top of the calendar (below the date).



- 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.

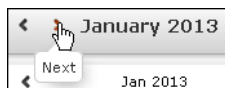
- Holidays are color-coded.

Navigating in the Calendar

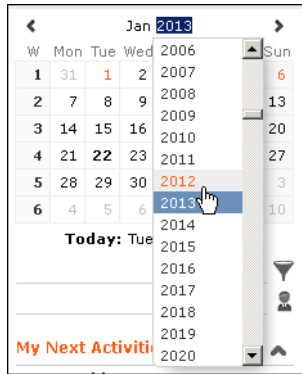
Learn to navigate in the calendar.


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, see [Daily and Weekly Planning](#) on page 95.

Daily and Weekly Planning

Learn to create plans and appointments on the calendar.

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.

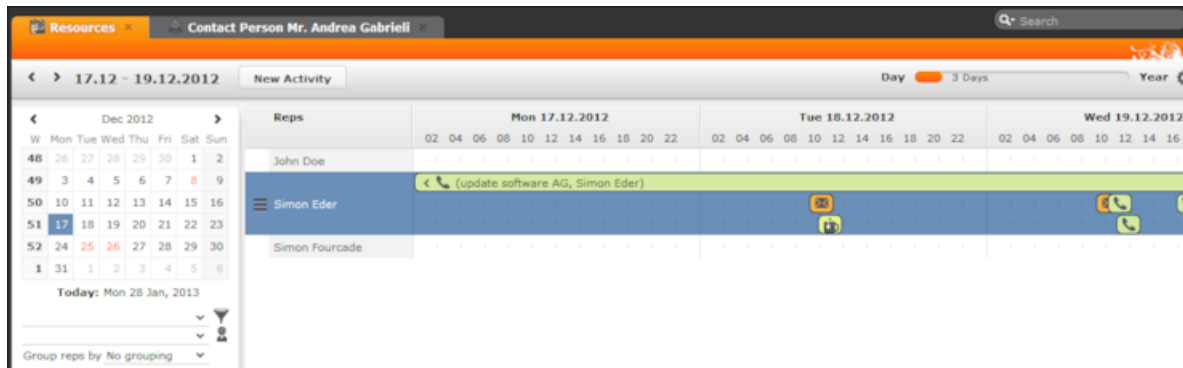
Resources

The resource view allows you to view the workload of reps.

This makes planning activities (especially internal meetings) much easier. Reps' absences (holidays and sick leave) are also displayed here.

To open the resource view:

1. Select  (**Collaboration**) > **Resources**.



The current date and time is indicated by a vertical line. Holidays are color-coded. If a rep’s working hours have been defined, this time is color-coded.

You can customize the resource view. For further details, see [Customizing the Resource View](#).

You can edit the displayed activities and absences and add new ones.

Customizing the Resource View

You can customize the resource view as follows:

- You can display or hide the sidebar by clicking on the arrow:




- 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:



Note: When displaying quarters or longer time periods, only appointments lasting a whole day or longer are displayed.

- Use the arrows in the header to switch between time periods.
- Select general or rep filters from the drop-down lists in the sidebars to determine which reps/appointments are displayed. You can define your own filters.
- You can select additional criteria used to group reps from the **Group reps by** drop-down list: **Department** (Org. Group ID field in the rep record), **Country**, **Skill** or **No grouping**.

-
- Click in the **Reps** column in the header to sort the reps displayed in the resource view within their group.
 - Click on  (**Edit Settings**):
 - Select the **Color Coding** criteria used to color activities.
 - Enable the **Show working hours only** option to restrict the display to the time period defined as working hours by your administrator.
 - Enable the **Show group column** option to display reps' groups in a separate column.

Note: The time period, reps and grouping options are stored and applied again the next time you open the resource view (including if you log off in the meantime).

Timeline

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.

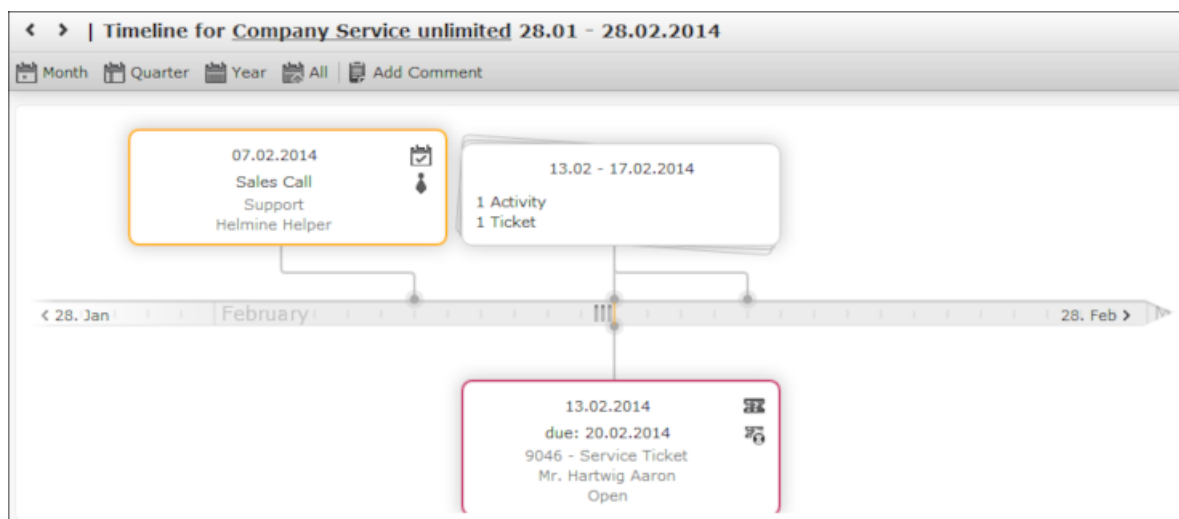
By default, timelines are available from the following areas:

- 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, see [Searching](#) on page 57.
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.
 - Drag the **☰** icon in the scroll bar to the left or right.
 - Click on the date at the far left or right of the scroll bar to move to the previous or next time period.
5. Click on a bubble to display the details of the record beneath the timeline. 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.


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.

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

Adding Notes

You can add notes concerning any insights gleaned from the timeline.

To add a note:

- Open the timeline.
- Click on  (**Add Comment**) and enter the text. Click **Save**.

Note: Notes can be linked to company records within the scope of your Aurea CRM solution.

Timeline Notes

To display timeline notes:

- Switch to the desired record.
- Select **Timeline > Timeline Comments** from the context menu. The notes are displayed.
- Click on a note to edit it.

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. You can click on a link to switch to the default view of the associated record.

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 multi-conditions 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.

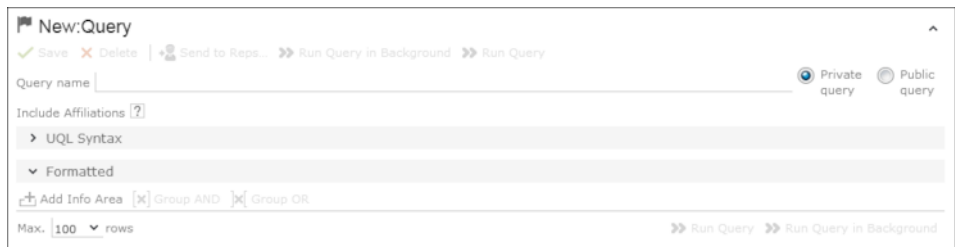
Defining a New Query

You can define queries in two ways:

- Using AQL (update 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.

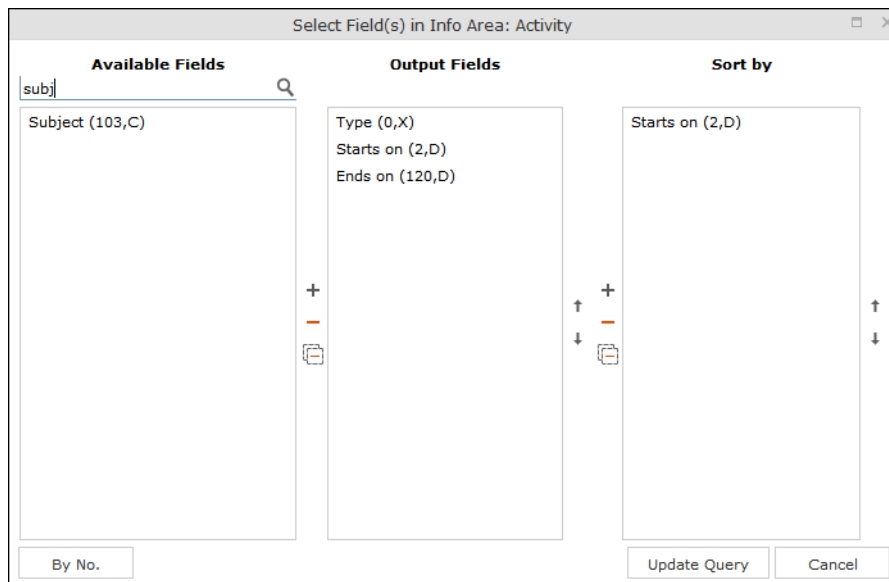
Note: You can however provide other users with private queries. For further details, see [Sending a Query Definition to another Rep](#) on page 121.

4. Enable the **Include Affiliations** option (if configured) to return records added for affiliates in the results. For more information, see Affiliation View in your product-specific manual that can be downloaded from <https://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. For further details, see [Field Data Types](#).
- 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. For further details, see [Selecting Multiple Records](#).

8. Click the **Add to Query** button to add your selection to the query.
9. Define the conditions in the query. For further details, see [Conditions](#) on page 109.
10. Save the query.


Editing Queries

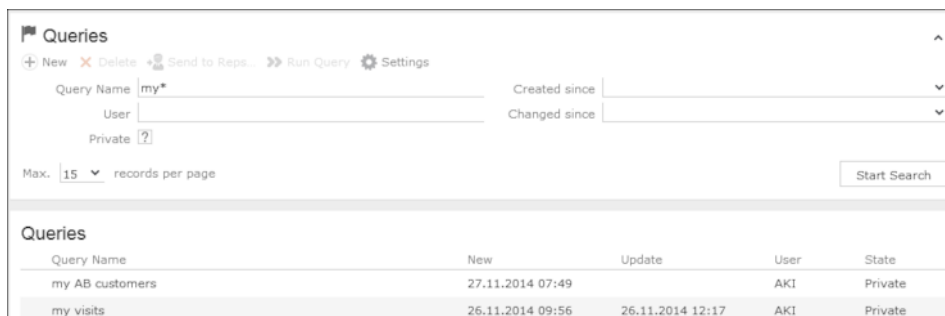
If you edit an existing query (e.g. add info areas, fields or conditions), an asterisk (*) is displayed following the name of the query in the header. The asterisk continues to be displayed until you save the changes.

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 are 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. 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. For further details, see [Handling Tab](#). 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. For further details, see [Exporting](#) on page 85.

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). For further details, see [Background Queries](#) on page 122.

To execute a query:

1. Load the desired query, see [Loading Queries](#).
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 receive a message when the query is executed. For further details, see [Background Queries](#) on page 122.

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. For further details, see [Handling Tab](#). If more results are returned than are displayed per page, use the navigation arrows (**« < 16 - 30 of 45+ > »**) to switch between pages.

Default: 50 hits per page.

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

Learn about queries for multiple info areas.

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 company or person, and any number of activities can be linked to the same company/person
- Each company and person can be linked with any number of activities

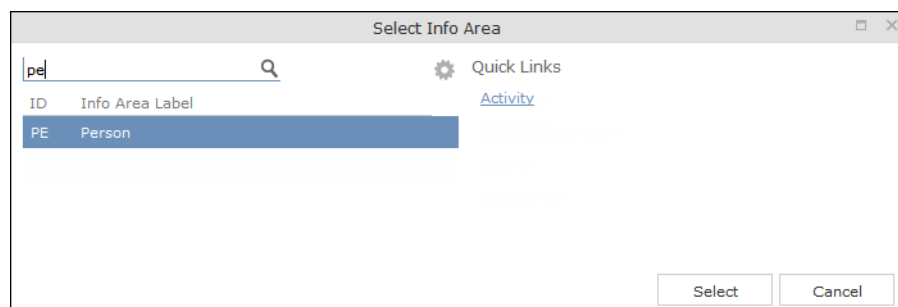
Note: A company is also linked to all activities, sales groups etc. to which persons in the company are linked.

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, see [Loading Queries](#).
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.
3. 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.



4. Select the info area from the list. The **Relationship Type** dialog box opens.

5. 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.

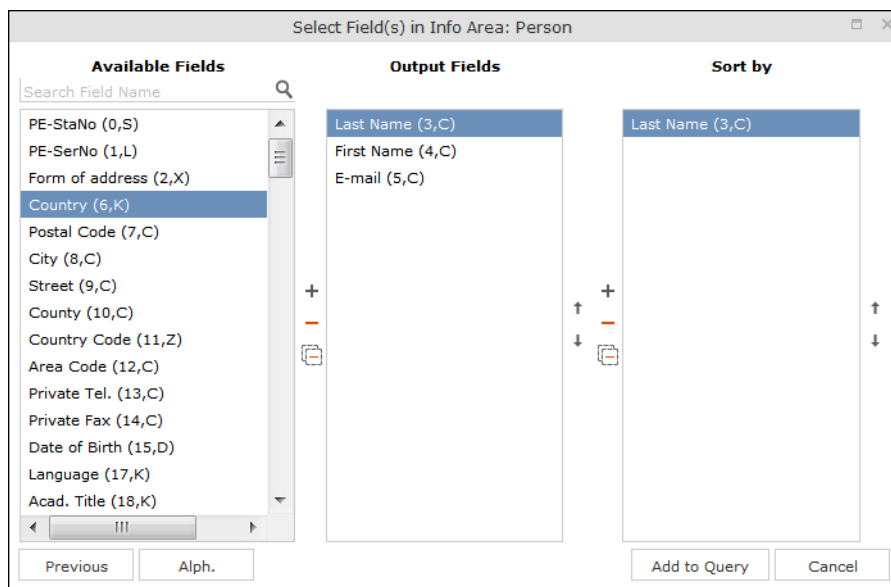
Note: Sort fields are only available for the relation types PLUS and WITH. Sort fields cannot be defined for WITHOUT, PLUS SUMMED or WITH SUMMED. Furthermore, no fields are available for WITHOUT. Only numeric fields can return summed values when using the SUMMED options. Other fields cannot be totaled 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 is shown, but not the information about the persons.

6. 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**.

7. 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.
8. Click **Continue**. The **Select Fields** dialog box opens.



9. Define the output and sort fields. For further details, see [Selecting the Fields in the List](#).
10. Click **Add to Query**. You are returned to the query overview.
11. Define your conditions, see [Conditions](#) on page 109.
12. From here, you can execute the query using the **Run** button, see [Executing Queries](#).



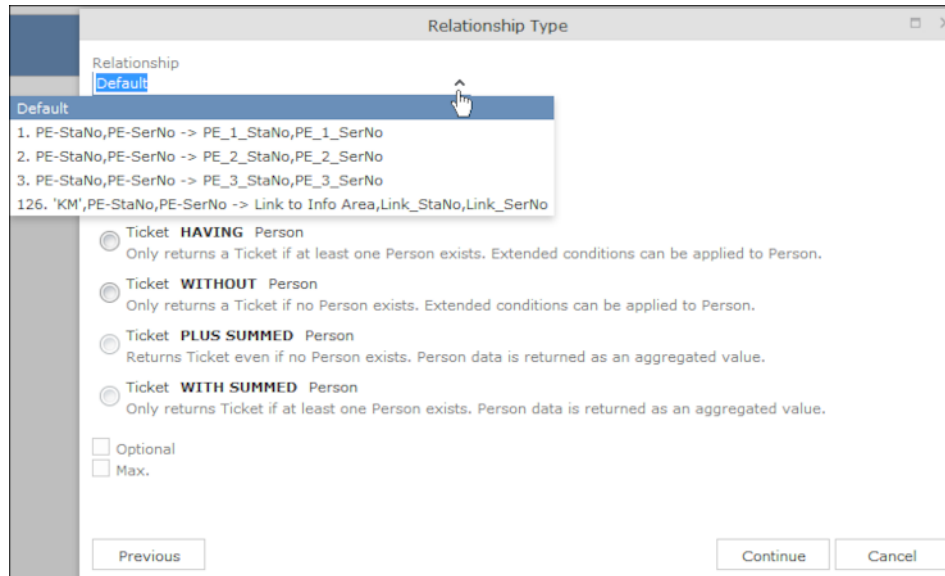
Selecting Links between Info Areas

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.

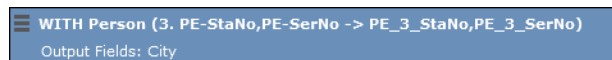
Example:

A query is defined for the **Ticket** info area. The **Person** info area is added to the query. Four links are available for selection between the **Ticket** and **Person** info area.



The area surrounded by the frame in the screenshot above lists the relationships between the **Ticket** and **Person** 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, see [Parameters and Predefined Queries](#) on page 120.

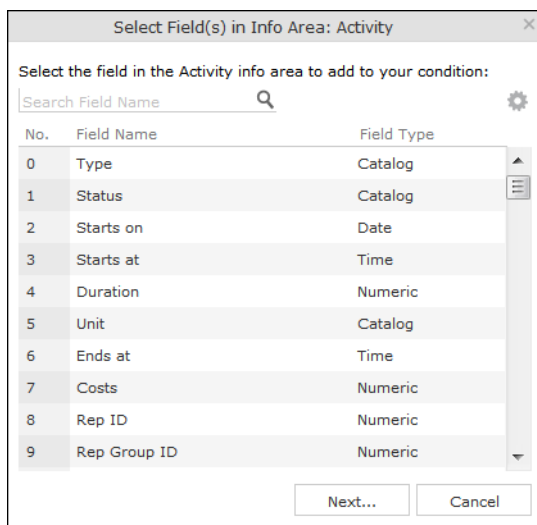
Note: Conditions can be applied to fields that you cannot access based on your access rights. These conditions are still taken into account by the query, however the contents of the field cannot be displayed in the results list.

Defining Conditions

Learn to define new conditions.

To add a new condition to a query:

1. Load a query, see [Loading Queries](#).
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.

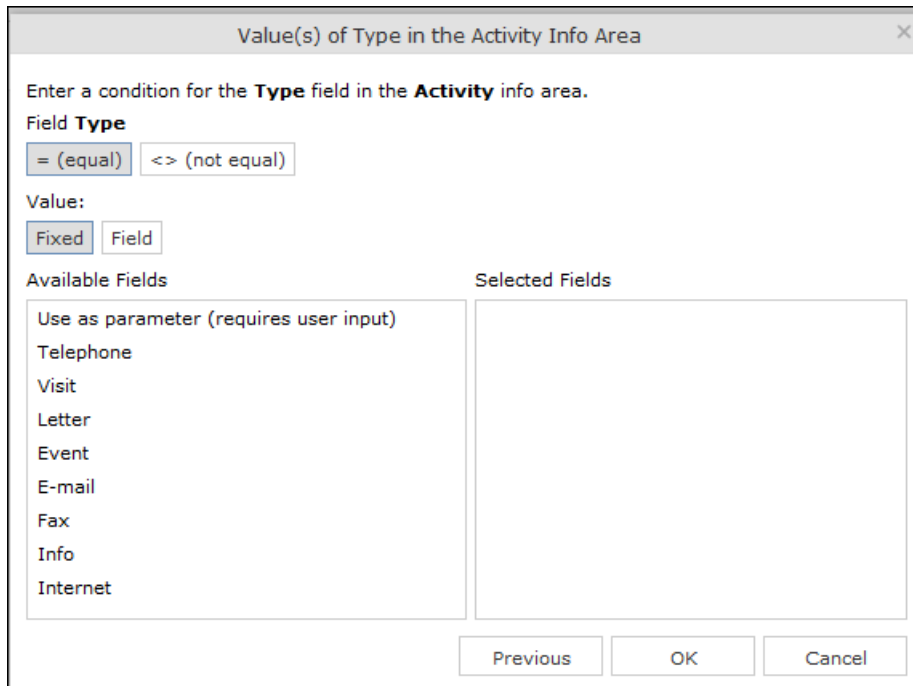
3. Click on a column heading to sort the list.

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; see [Conditions for Numeric, Alphanumeric and Time Fields](#).
 - Date field; see [Conditions for Date Fields](#) and [Variable Conditions](#).
 - Catalog field; see [Conditions for Catalogs](#) and [Conditions for Child Catalogs](#).
 - Numeric field; see [Conditions for Numeric, Alphanumeric and Time Fields](#).
 - Logical (Boolean) field; see [Conditions for Boolean Fields](#).
 - Time field; see [Conditions for Numeric, Alphanumeric and Time Fields](#).
 - Rep field; see [Conditions for Rep Fields](#) and [Variable Conditions](#).
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. For further details, see [Parameters and Predefined Queries](#) on page 120.

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, see [Comparing Field Contents](#). The **Text** option is also available for variable catalogs, see [Conditions for Variable Catalogs](#).
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 sub-strings. To do so:

1. Select a variable catalog field. The dialog used to define the condition is displayed.

Value(s) of Country in the Person Info Area

Enter a condition for the **Country** field in the **Person** info area.

Field **Country**

= (equal) <> (not equal)

Value:

Fixed Field **Text**

*land

Use as parameter (requires user input)

Previous OK Cancel

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. 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:

Value(s) of Interest in the Interest Info Area

Enter a condition for the **Interest** field in the **Interest** info area.
Please select the parent catalog value:

Sports

Field **Interest**

= (equal) <> (not equal)

Value:

Fixed Field

Available Fields

Use as parameter (requires user input)

no value
Diving
Football
Hiking

Selected Fields

Tennis

Previous OK Cancel

Conditions applied to child catalogs are otherwise defined the same as for all other catalogs. For further details, see [Conditions for Catalogs](#).

Conditions for Boolean Fields

To define a condition for a Boolean field:

1. Select a Boolean field.

Value(s) of Recurring activity in the Activity Info Area

Enter a condition for the **Recurring activity** field in the **Activity** info area.

Field **Recurring activity**

= (equal) <> (not equal)

Value:

Fixed Field

Yes No

Use as parameter (requires user input)

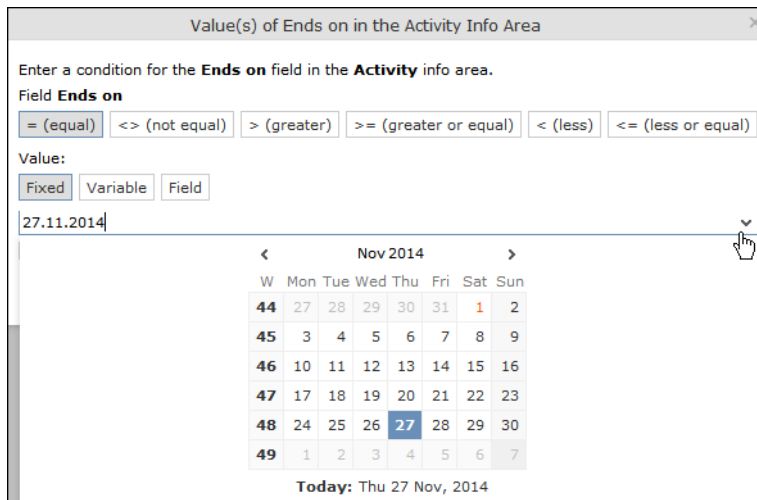
Previous OK Cancel

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. For further details, see [Comparing Field Contents](#).
4. Select either **Yes**, (true) **No** (false) or **Use as parameter** as the comparison value. For further details, see [Parameters and Predefined Queries](#) on page 120
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.

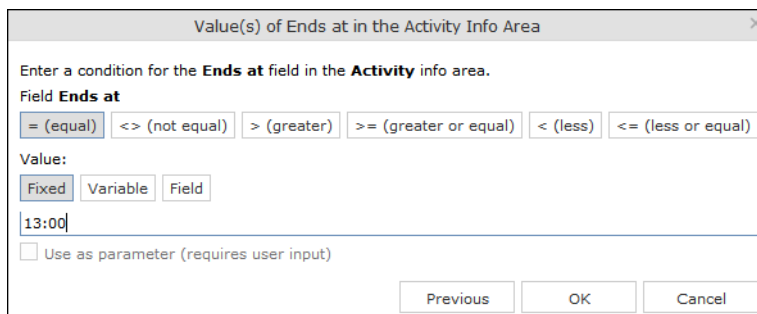


2. Select the type of comparison (**equal**, **not equal** etc.).
3. Date fields allow you to use fixed and variable comparison values. Use the **Fixed** option to compare the value with a specific date or to a value entered by the user (if the **Use as Parameter** option is enabled). Use the **Variable** 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. For further details, see [Variable Conditions](#), [Comparing Field Contents](#) and [Parameters and Predefined Queries](#) on page 120.
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). For further details, see [Variable Conditions](#) and [Comparing Field Contents](#). 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. For further details, see [Parameters and Predefined Queries](#) on page 120.

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. For further details, see [Parameters and Predefined Queries](#) on page 120. Wildcards (*, ?) may also be used for text fields.
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.

Value(s) of Created by ID in the Person Info Area

Enter a condition for the **Created by ID** field in the **Person** info area.

Field **Created by ID**

= (equal) <> (not equal)

Value:

Fixed Variable Field

Peter Parker; Chris Aki;

Use as parameter (requires user input)

Previous OK Cancel

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. For further details, see [Comparing Field Contents](#). Enable the **Use as Parameter** option if you want a comparison value to be entered by the user upon starting the query. For further details, see [Parameters and Predefined Queries](#) on page 120.

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), see [Selecting Reps](#) on page 86.

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

Elke Führer; Gudrun Peischer; Miranda Meyer

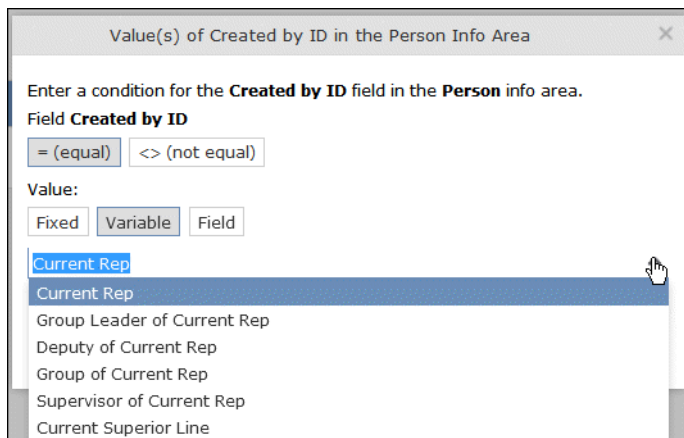
Variable Conditions

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.



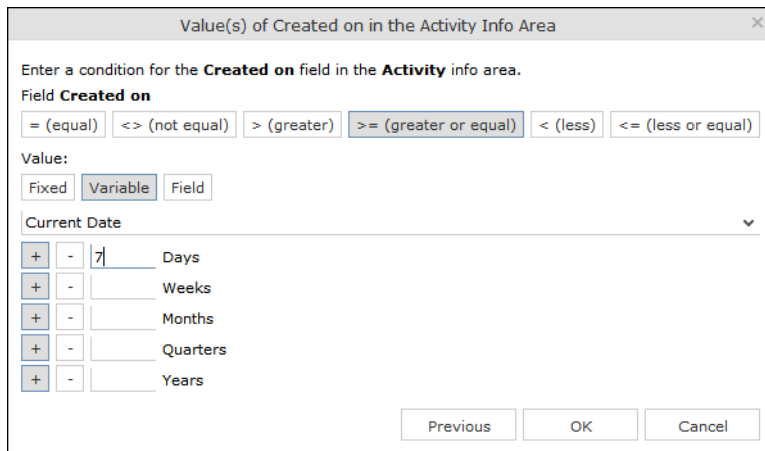
2. Select an option from the drop-down list. The appropriate user is used by the query as a comparison value when it is executed.

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.

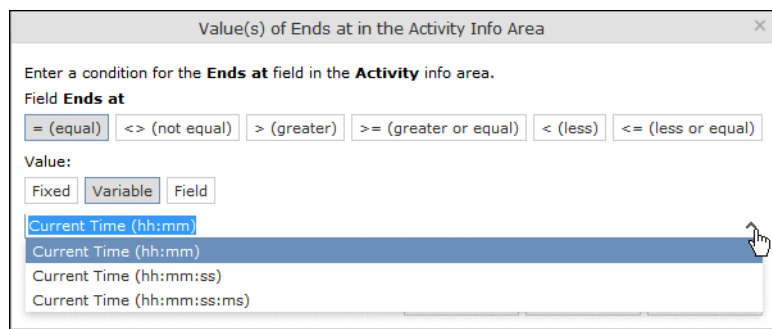


Variable Time Fields

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

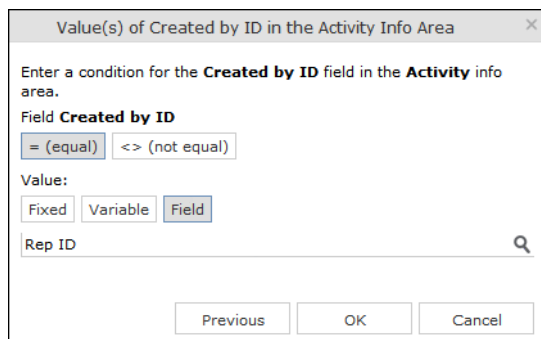
When defining conditions, you can choose to compare the value stored in fields in a record.


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  (**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.

Query Visits and e-mails*

Save Delete Send to Reps... Run Query in Background Run Query

Query name Visits and e-mails Private query Public query

UQL Syntax

```
select (Contact, Date, Rep) from (MA)
where ((Contact='#1' OR Contact='#5') AND (Date='20150112' OR Date='20150119' OR Date='20150126'))
```

Formatted

Add Info Area [x] Group AND [x] Group OR

Activity

Output Fields: Type, Starts on, Rep

	AND	Type = ("Visit" OR "E-mail")
	OR	Starts on = "12.01.2015"
		Starts on = "19.01.2015"
		Starts on = "26.01.2015"

Max: 100 rows Run Query Run Query in Background

Linking Conditions

Learn about 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 **[x] (Group AND)** or **[x] (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:

Query Visits and e-mails*

Save Delete Send to Reps... Run Query in Background Run Query

Query name Visits and e-mails Private query Public query

UQL Syntax

```
select (Contact, Date, Rep) from (MA)
where ((Contact='#1' OR Contact='#5') AND (Date='20150112' OR Date='20150119' OR Date='20150126'))
```

Formatted

Add Info Area [x] Group AND [x] Group OR

Activity

Output Fields: Type, Starts on, Rep

	AND	Type = ("Visit" OR "E-mail")
	OR	Starts on = "12.01.2015"
		Starts on = "19.01.2015"
		Starts on = "26.01.2015"

Max: 100 rows Run Query Run Query in Background

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:

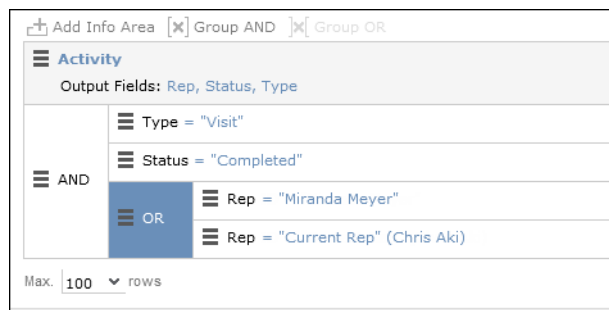
Comparing the contents of one or more fields with a value

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.



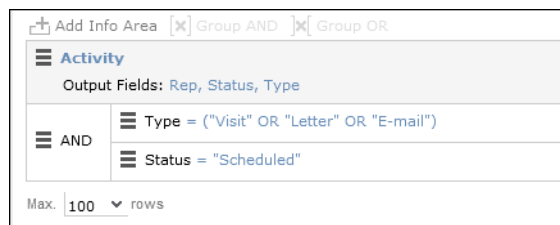
Comparing the value in a catalog field to one or more values

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'

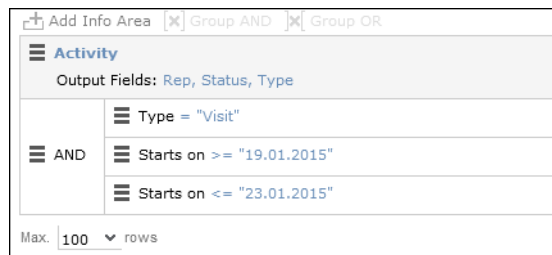


Comparing the contents of a field (not a catalog field) to more than one value

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"



Advanced Conditions

Advanced conditions are only available for info areas that are linked with either the "HAVING" or "WITHOUT" relationships.

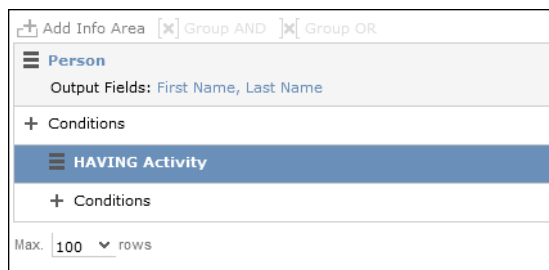
You can use advanced conditions to use sum totals to restrict your query results. For example, you can list all companies with more than 10 employees exist using advanced conditions.

Defining Advanced Conditions

To define an advanced condition:

1. Link two info areas in a query using either HAVING or WITHOUT. For further details, see [Defining a New Query](#) and [Adding Info Areas](#) on page 105.

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.

Value(s) of Sum (Count) in the Activity Info Area

Enter a condition for the **Count** field in the **Activity** info area.

Field **Count**

= (equal) <> (not equal) > (greater) **>= (greater or equal)** < (less) <= (less or equal)

Value:

Fixed

5

Use as parameter (requires user input)

Previous OK Cancel

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.

+ Add Info Area [X] Group AND [X] Group OR

Person
Output Fields: First Name, Last Name

+ Conditions

HAVING Activity
Adv.Cond. Count() >= "5"

Parameters and Predefined Queries

Learn about the use of parameters and predefined queries.

Most users may 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. For further details, see [Defining Conditions](#) on page 109.

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

1. Open a query, see [Loading Queries](#).

- 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.
- 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

Learn to make private queries available to other reps.

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:

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

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



- The selected query's name is displayed in the **Query name** field. You can rename the query.
- 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

Learn to save, load and export query result.

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.

Background Queries

In order to be able to continue working with Aurea CRM web while the query executes, you can execute queries in the background.

Queries may take some time to execute, depending on the volume of data that needs to be searched. 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.

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

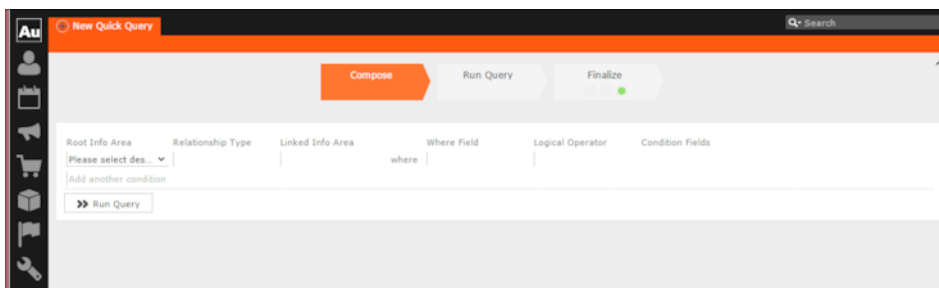
Aurea CRM allows customers with enterprise versions to allow their users to create Quick Queries. Users can then share their queries with others or save them as private queries. Searching for a quick query is similar to searching for the standard queries as explained in the previous chapter Queries.

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.

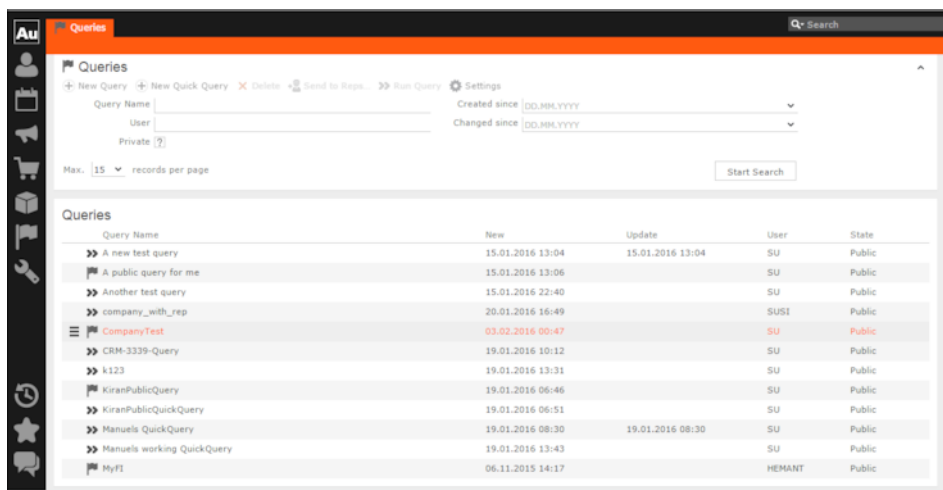
The query execution stage allows you to run the query composed and/or enhanced so far.

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 is available to other users. As a private query it is available only to you.

Creating a Quick Query

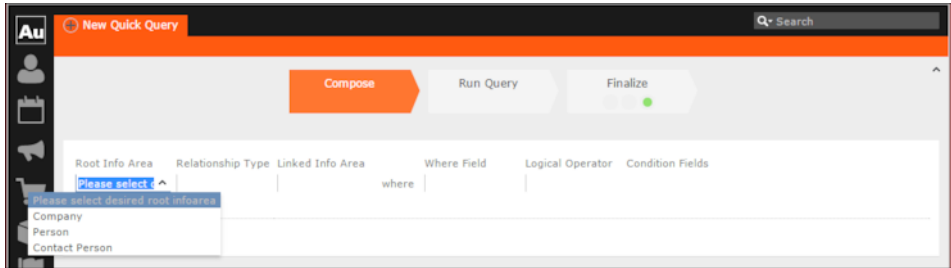
To create a quick query, perform the following steps:

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

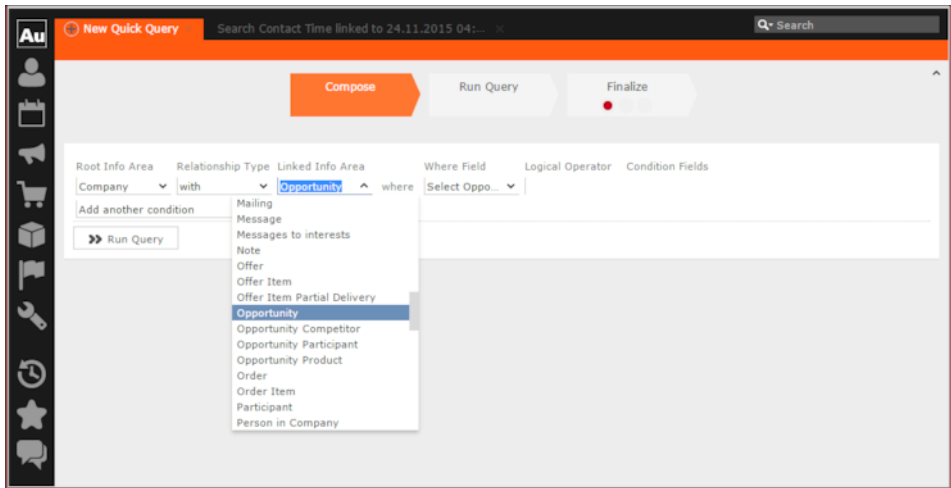


Note: The list of queries displayed contains both Quick Queries and standard queries. The Quick Queries in the Queries list are tagged with the » icon.

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.

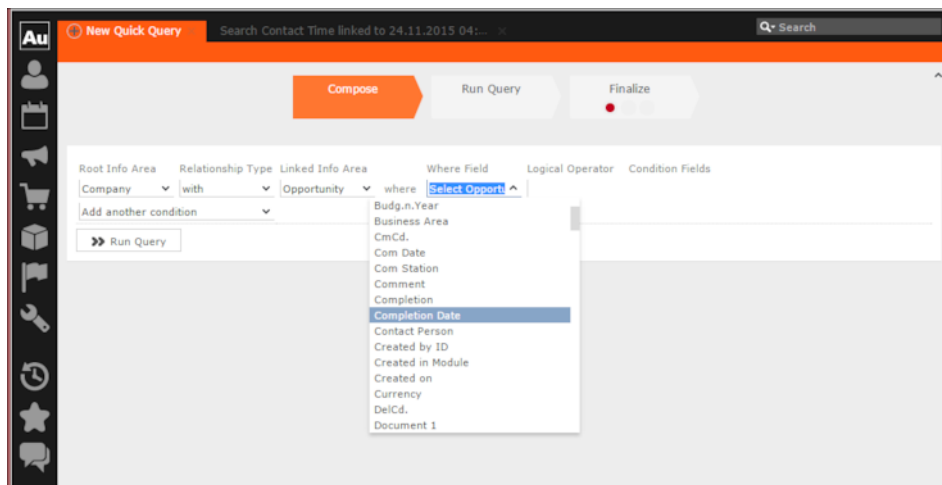


4. Select the **Relationship Type** from the drop down list for the linked info area. The **Where Field** activates and is populated with applicable fields for the linked info area. In the screenshot example, the root info area is company, and the relationship type **With** for the **Linked Info Area** 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.

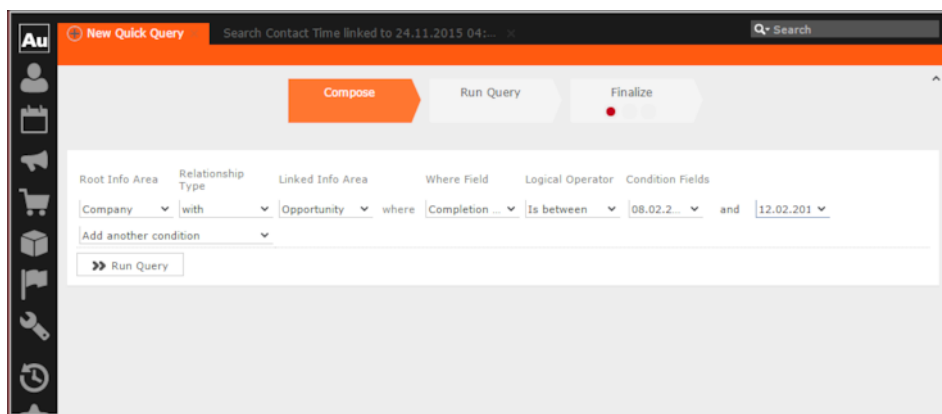


Note: The Where Field column gets activated and shows the fields from the linked info area, in this case the Company fields.

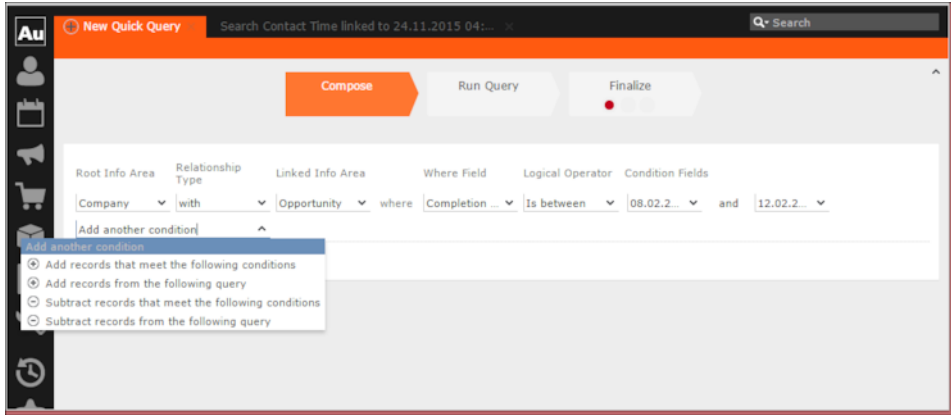
6. Scroll down and select the required info area field from the **Where Field** drop down list. The Logical Operator field column activates. In this example screenshot, **Completion Date** is selected.
7. Select the applicable **Logical Operator** from the drop down list. You have the following options: 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 gets the operators: Is true; Is not true.

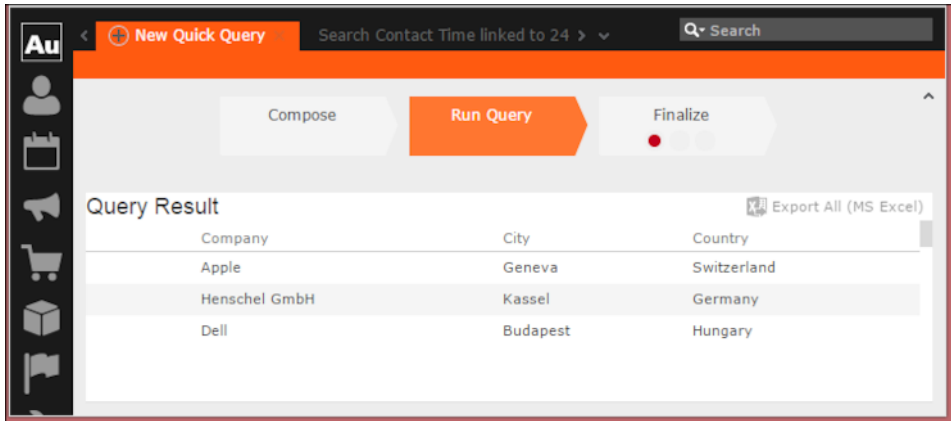
The Condition Fields column activates and the drop down list is populated with the available values. In this case it displays the available country names. In this example screenshot, the **Logical Operator** Is between is selected and in the **Condition Fields** the start and end dates between which 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



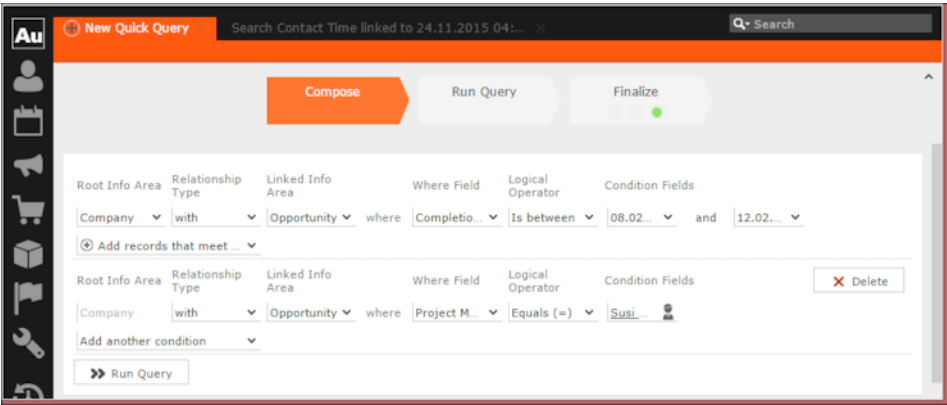
9. Click Run Query to test the results.



10. Depending on your choice, perform the following sub-steps.

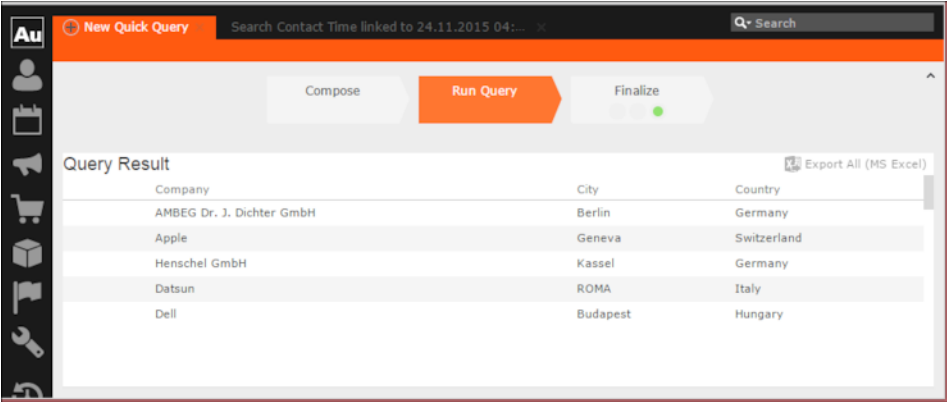
Note: At this point you move into the enhance stage of a query definition, adding or subtracting records from another query. You can add the standard queries or quick queries to enhance your base query you are composing. You can also continue with composition by adding or subtracting records with more 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.

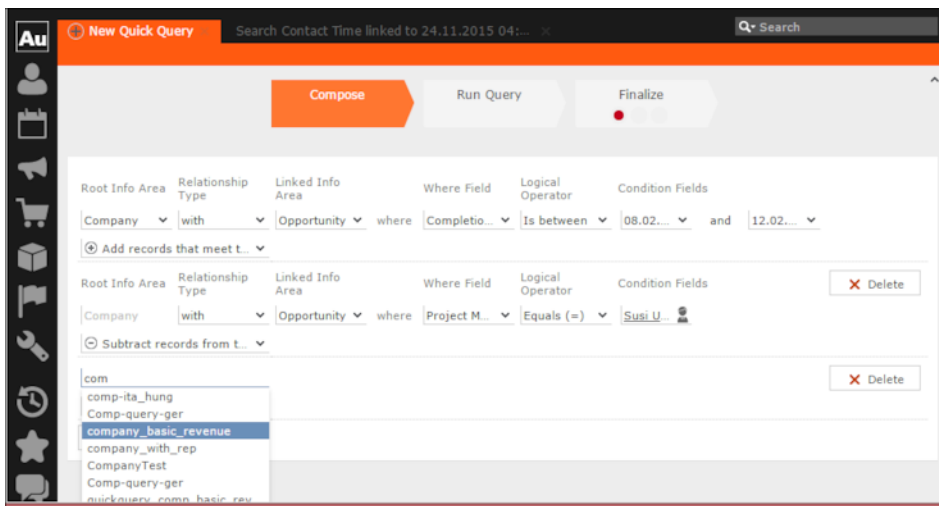


Note: In this run additional records are added to the run on the base query run in step 9 above.

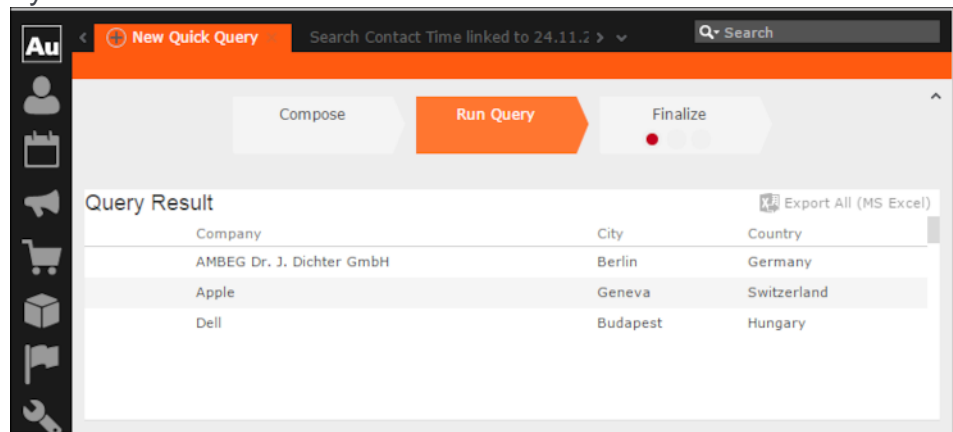
c. To **Add a record from the following query** or **Subtract a record from the following query** perform the following:

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

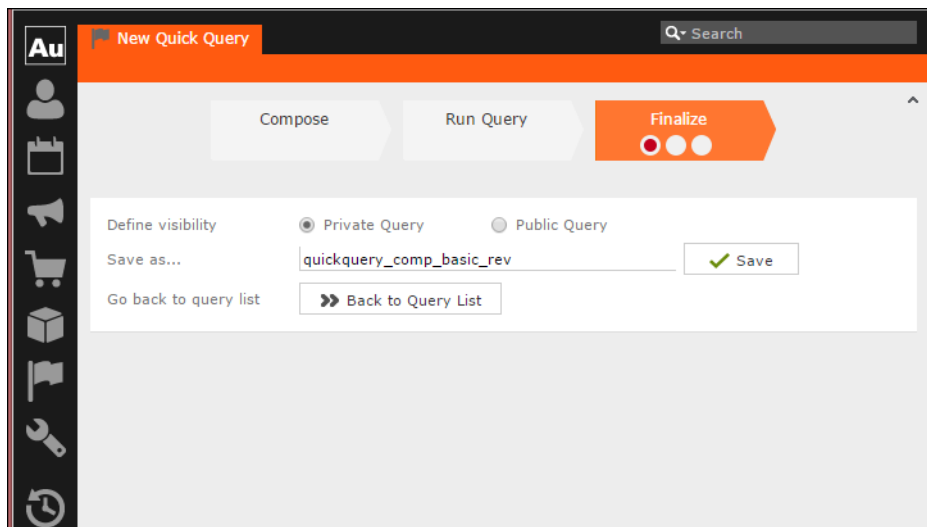


enhancement.

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.



- a. Check Private Key to save the Quick query for your personal use or check Public Query to share the Quick Query with others.
- b. Enter a name for the Quick Query in the **Save as...** text field.
- c. 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.

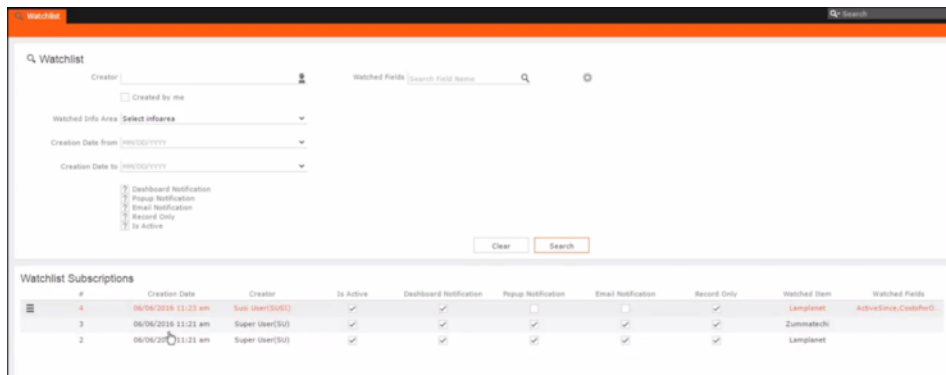
Note: Change Notification Service is an enterprise feature.

Overview of Watchlists and Notifications

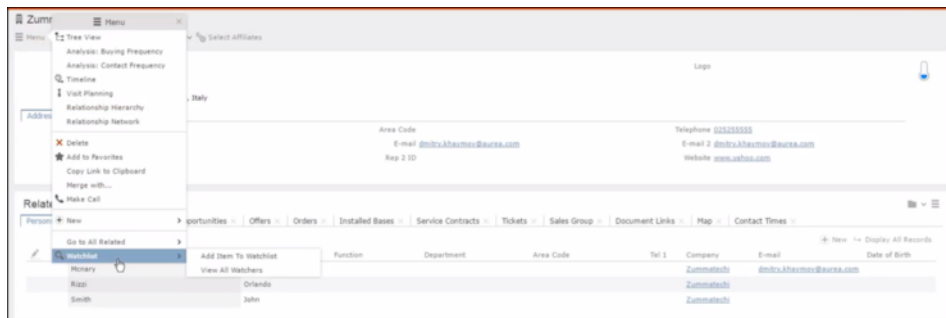
Aurea CRM users can set up their personal Watchlist of items to be notified about changes.

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:



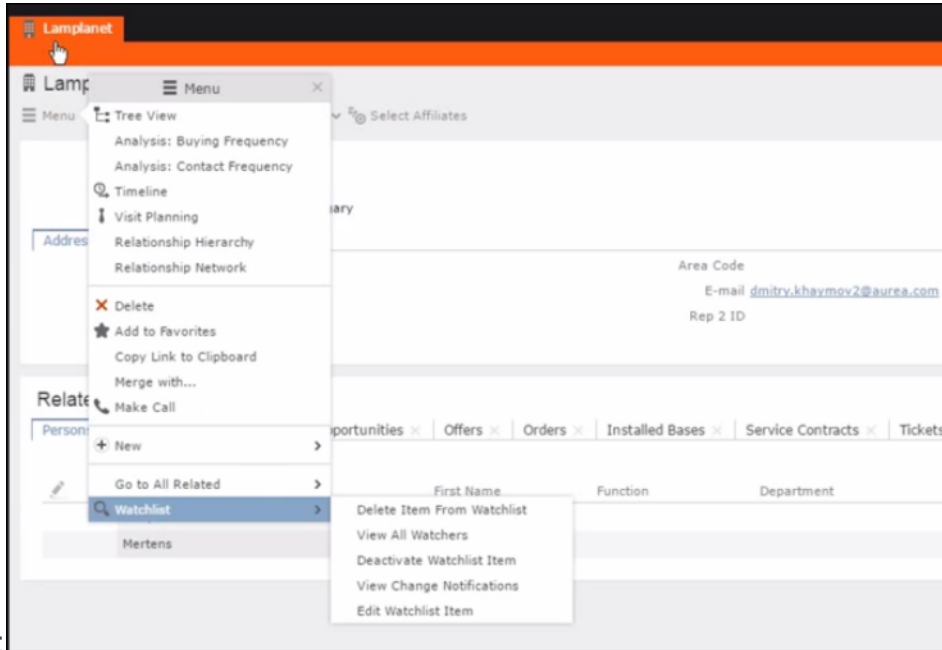
For a given record or infoarea the Watchlist context menu initially allows you to add a Watchlist item. For example, the screenshot below shows the **Add Item to Watchlist** and **View all Watchers** sub-menu items for the Company infoarea.



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 be-

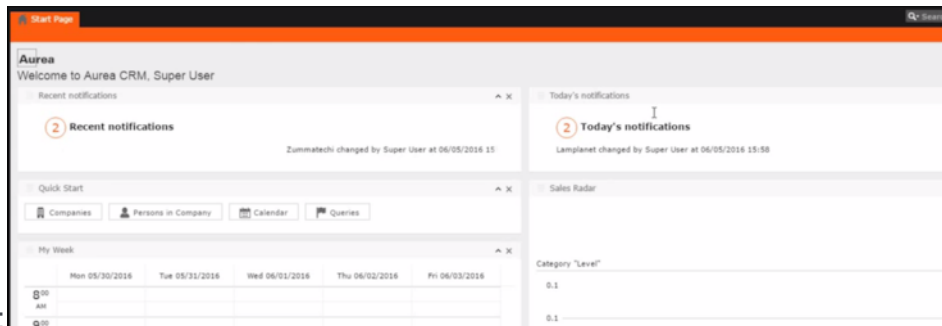


low:

A notification is generated when one of the following condition is fulfilled:

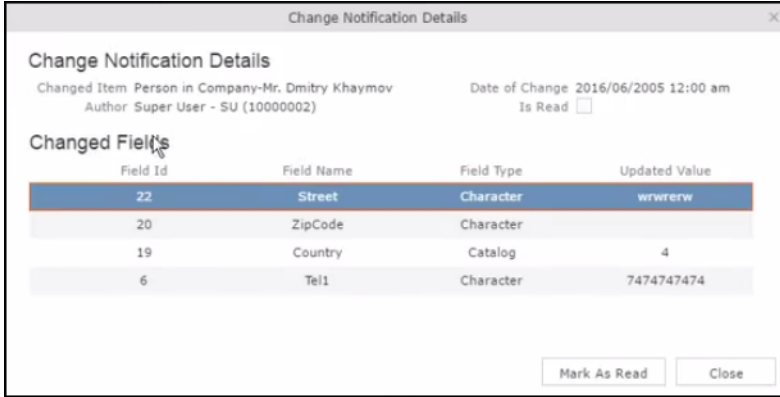
- A notification request is set for any change to the record of interest and a change is made to the record.
- A notification request is set for changes made to specific fields of a record and one or more of the specified fields are changed.

The following screenshot shows the change notifications visible on the Dash-



board:

The following screenshot shows a popup change notification:



tion:

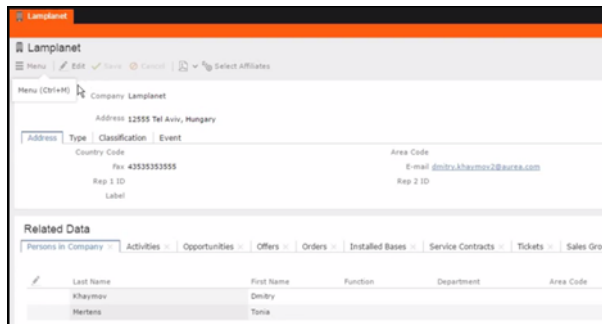
The remaining sections describe the various tasks required to create and work with Watchlist items.

Adding items to the Watchlist

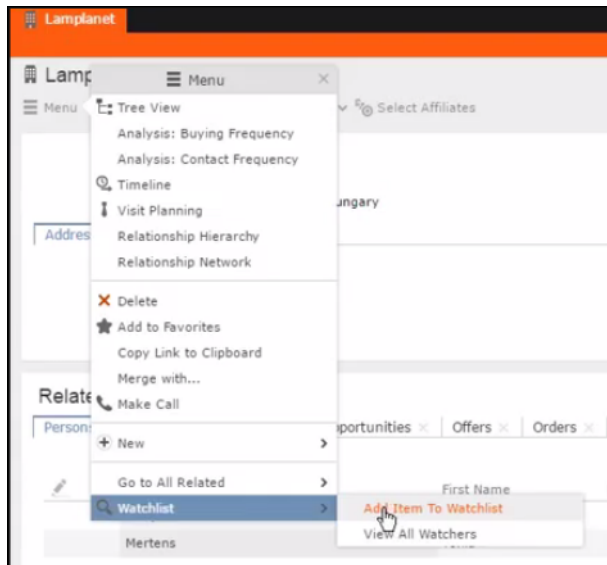
Learn to add items to watchlist.

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.



 A screenshot of the 'Add Item To Watchlist' dialog box. The dialog contains a search icon and the text: 'Please select notification option and add item to personal watch list to get notified if something changes with the record.' Below this, there is a section for 'Notification Types' with four options: 'Dashboard Notification' (checked), 'Popup Notification', 'Email Notification', and 'Record Only'. There is also a 'Notify On' dropdown menu and a 'Save' button at the bottom.

Note: You have to select at least one **Notification Type** and also specify a **Notify On** event to successfully add a watchlist item.

3. 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 is 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.

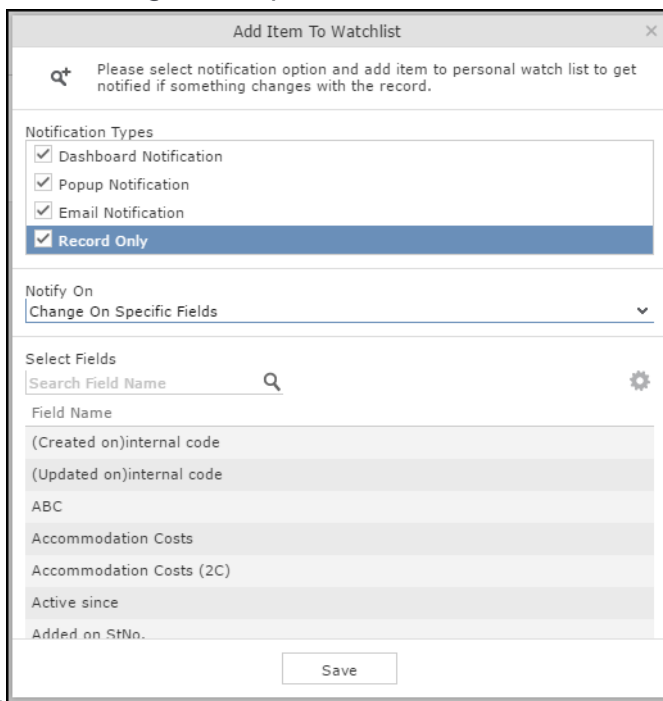
- **Email Notification**—Change notification is sent by email.
- **Record Only**—Change notification is persisted in the database, but no popup, email, or dashboard notifications are displayed. You can view the change notifications from the watchlist context menu of the watched record.

4. 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

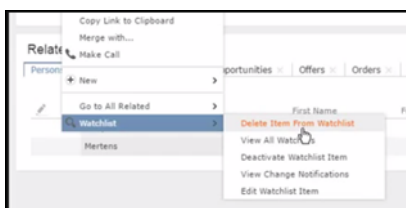


list.

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.

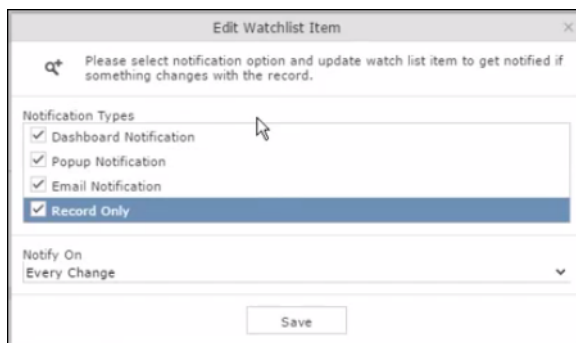
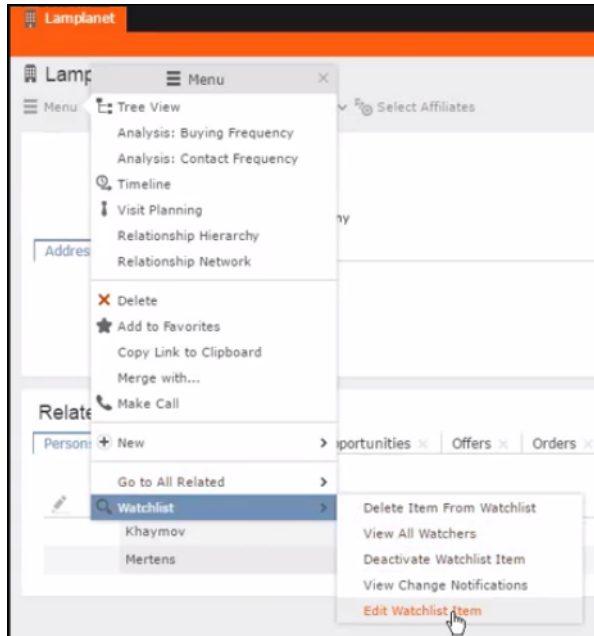


Editing Watchlist Item

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.
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**.

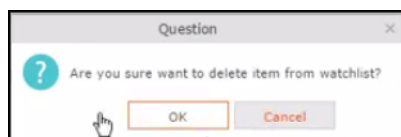
The changes are saved to the watchlist item.

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

Navigate to 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

Learn to stop / start 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.

Watchlist

Creator:

Watched Fields:

Created by me

Watched Info Area:

Creation Date from:

Creation Date to:

Dashboard Notification
 Popup Notification
 Email Notification
 Record Only
 Is Active

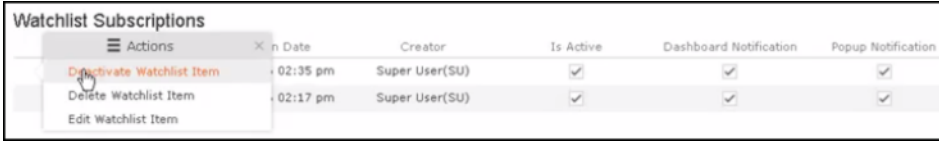
There is no found watchlist subscriptions.

2. Populate the required search filters and click **Search**. The search results displays.

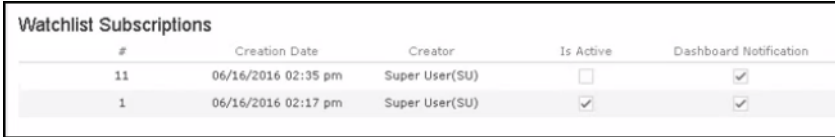
#	Creation Date	Creator	Is Active	Dashboard Notification	Popup Notification	Email Notification	Record Only	Watched Item	Watched Fields
11	06/16/2016 02:38 pm	Super User(SU)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Zummatash	
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.

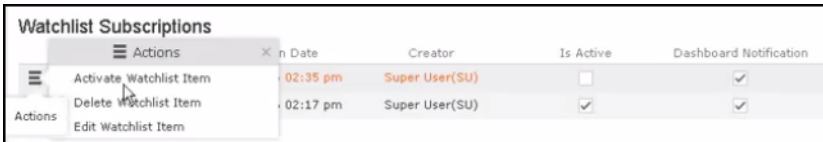
3. To deactivate an active watchlist item:
 - a. Click the **Actions** context menu. The **Actions** menu displays.



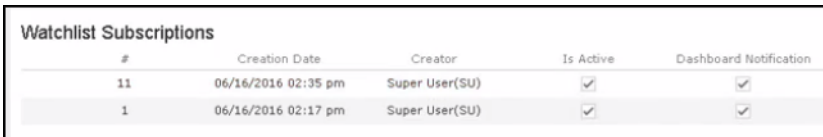
- b. Select **Deactivate Watchlist Item**. The watchlist item is marked as inactive.



4. To activate a watchlist item:
 - a. Click the **Actions** context menu. The **Actions** menu displays.



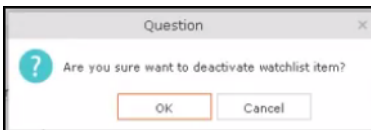
- b. Select **Activate Watchlist item**. The watchlist item is marked as active.



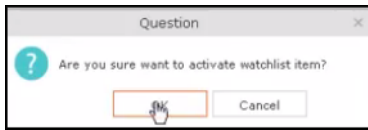
Activate/Deactivate from record's context menu

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.



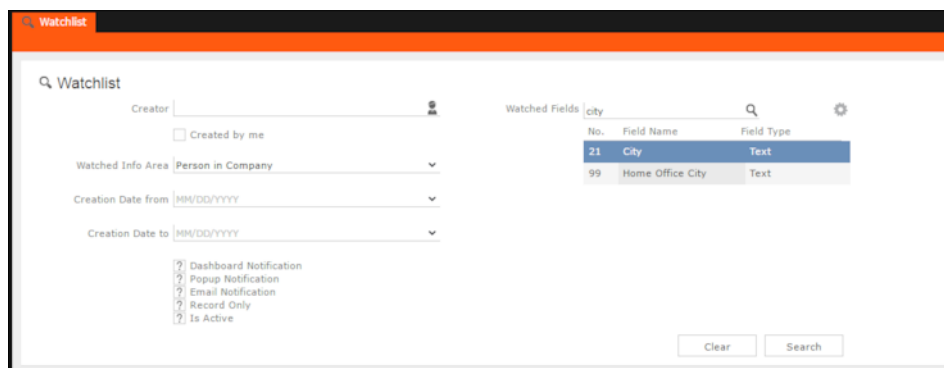
- b. Click **OK**. The watchlist item is activated.

Search watchlist subscriptions

Learn to search the watchlist subscriptions.

To search the watchlist subscriptions, perform the following steps:

1. Select **Collaboration > Watchlist > Watchlist Subscriptions**. The Watchlist Subscription Search page displays.



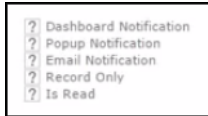
2. Select the search filters from the following list:

- **Creator** —Filter watchlist subscriptions created by the specified subscriber. Only one person can be selected. If select the **Created by me** filter, the search is restricted to watchlist items created by you.
- **Watched Info Area**—Filter watchlist subscriptions on records from the selected infoarea. The **Selected Fields** filter is 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:

- 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 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.

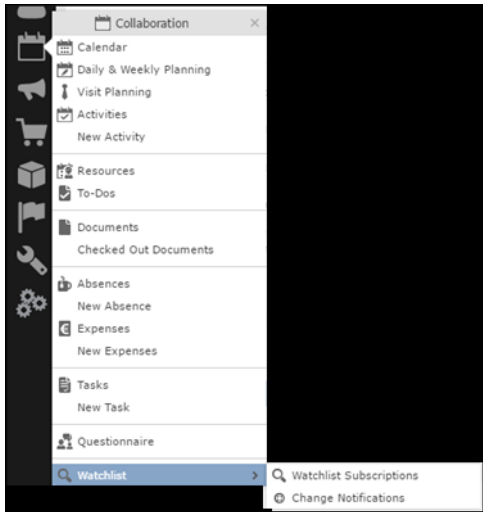
Watchlist Subscriptions									
#	Creation Date	Creator	Is Active	Dashboard Notification	Popup Notification	Email Notification	Record Only	Watched Item	Watched Fields
11	06/14/2016 02:38 pm	Super User(SU)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Zummatashi	
1	06/14/2016 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"/>	Lampiran	

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.

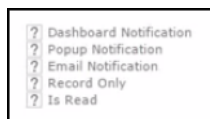
 A screenshot of the 'Change Notifications' page. The page has a search bar at the top right. Below the search bar, there are several filters: 'Author' (with a user icon), 'Changed Fields' (with a search field), 'Changed Infoarea' (a dropdown menu), 'Date of Change from' and 'Date of Change to' (date pickers), and 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 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 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:

- 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**.

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	RegID
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 checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

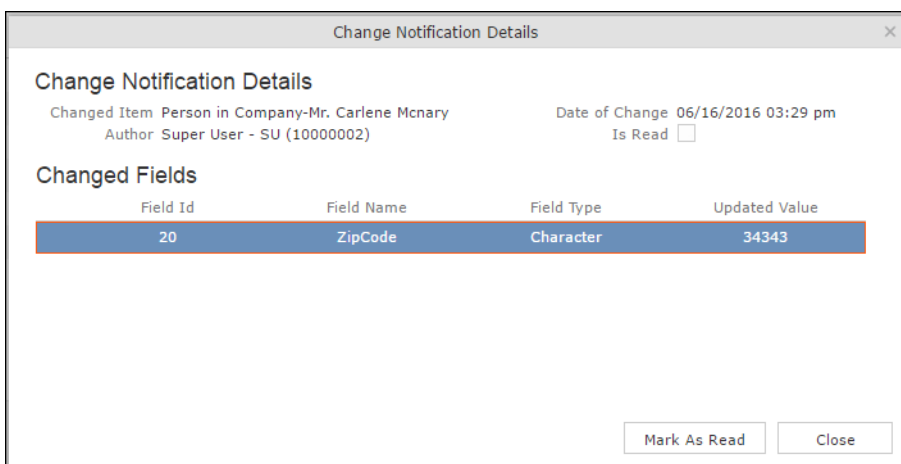
- b. Viewing the change notification details.

To view the details of a change notification:

- Click the **Action** context menu, and select **View Change Notification Details**.

Change Notifications									
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	RegID
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.



Notice that the changed fields are displayed in the window and you can also mark the notification as read from this window too.

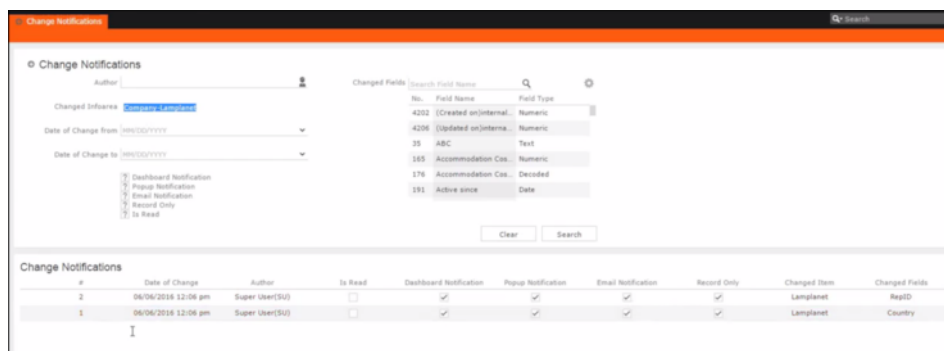
Viewing Change Notifications for a Record

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.



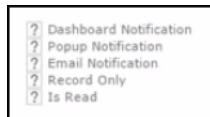
Note: The Changed Infoarea field is locked to the record for which you are searching for notifications. This field cannot be changed because this function was called from the record’s watchlist menu.

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:

- 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**. A check mark appears in the **Is Read** column for the notification.

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	RegID
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

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 checked="" 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									
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	RegID
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

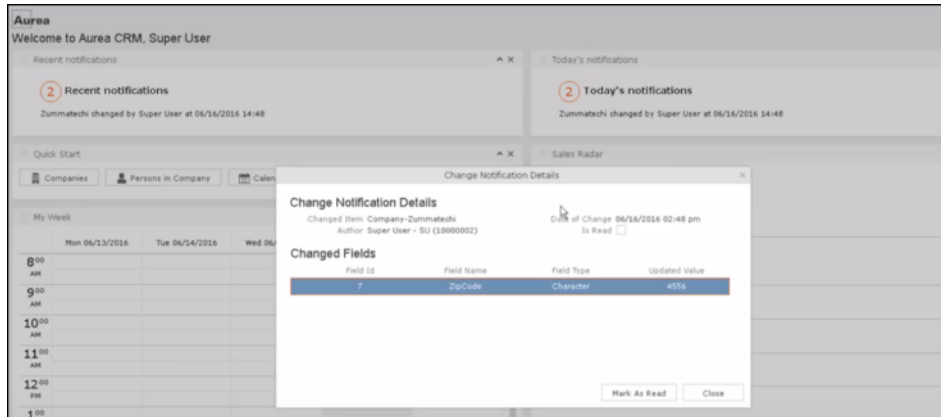
Notice that the changed fields are displayed in the window and you can also mark the notification as read from this window too.

Marking Change Notification as Read

Once you have read a notification, you can mark it as read.

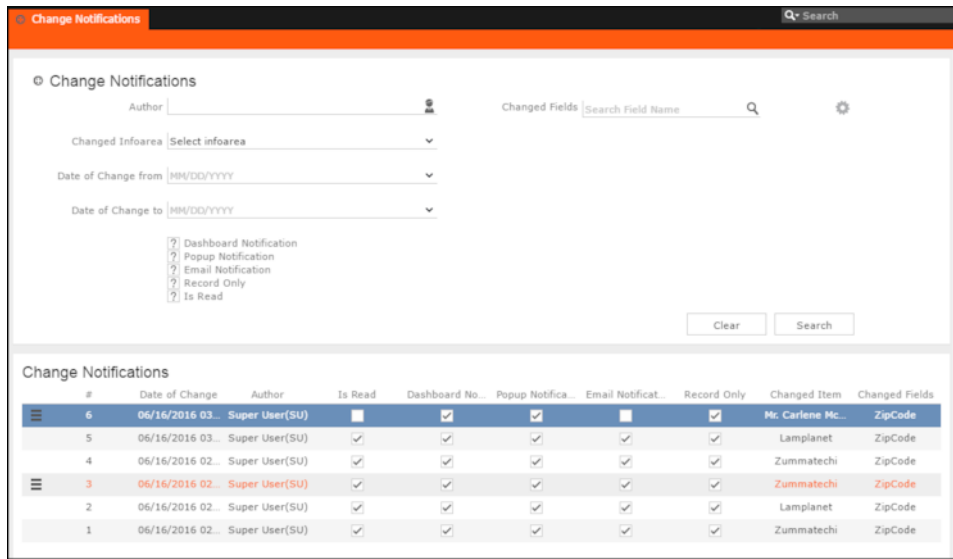
You have to mark the notification as read only once from any of the notification channels: dashboard, popup, or record only.

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:

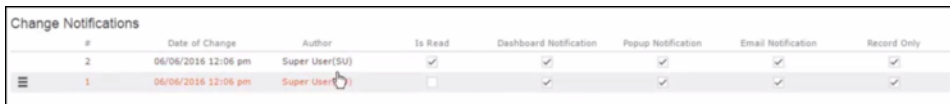
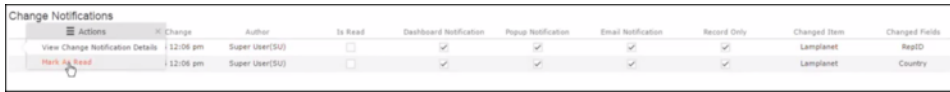
1. Select **Collaboration > Watchlist > Change Notifications**. The Change notification search page displays.
2. Enter the required search filters and click Search. The search results displays.



3. For the required change notification, you can mark it as read in one of the following ways:

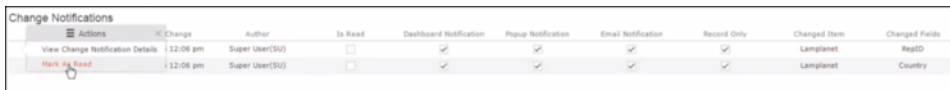
a. Marking the notification item as read. To mark the item as read:

- Click the Action context menu, and select **Mark as Read**. A check mark appears in the **Is Read** column for the notification.

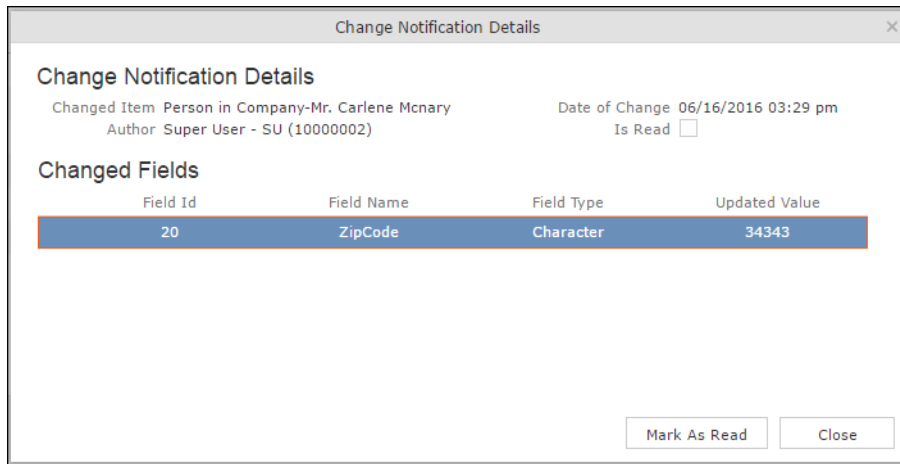


b. Marking the item as read from the change notification details window.

- Click the **Action** context menu, and select **View Change Notification Details**.

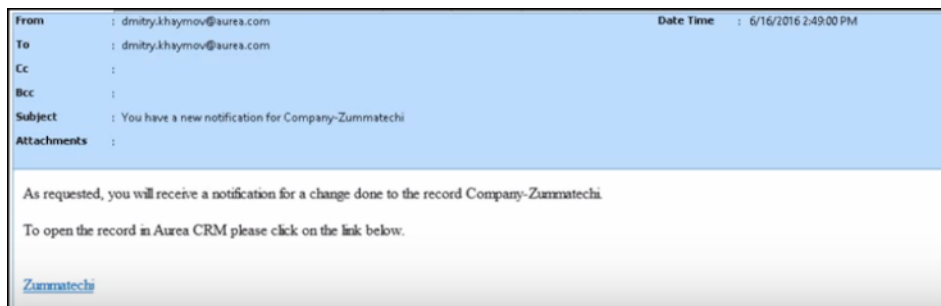


- The Change Notifications Details window displays.



- Click **Mark as Read**.

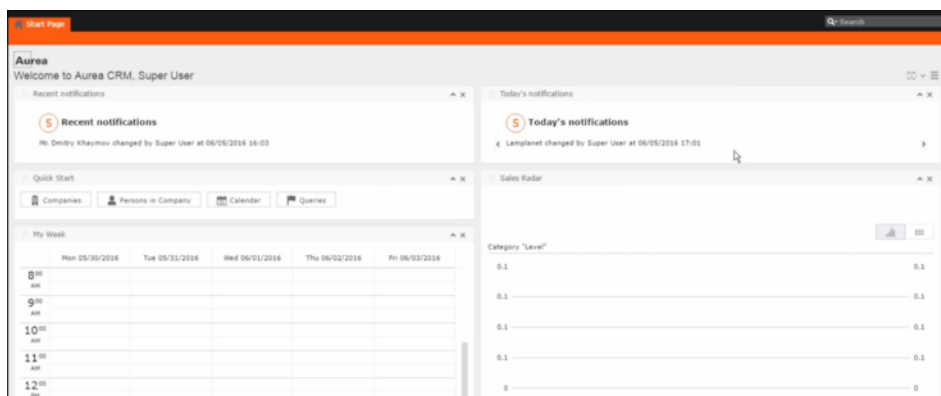
For email notifications, opening the email automatically marks it as read. Unlike conventional emails, marking an email notification in the mail client as unread, does not change the status of the notification to unread in the Aurea CRM server. The following screenshot shows a sample email change notification for a company record.



Change Notifications on the Dashboard

The dashboard can display two types of change notifications.

These are 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 the 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.

For further details, see [Queries](#) on page 100.

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 CRM.intelligence.

Loading an Analysis

Learn to load 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, see [Editing the Analysis](#) on page 159.
- Execute the analysis, see [Executing an Analysis](#) on page 153.

Executing an Analysis

Learn to execute and analysis.

To execute an analysis:

1. Load an analysis, >> [Loading an Analysis](#) on page 152.

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.

Category "Type"

Category: Type

Values:

- Count (Activity)
- Sum (Duration)

Filter:

- Type: all
- Status: Completed
- Starts on from: [dropdown]
- Starts on to: [dropdown]

Run

Results (10 record(s))

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](#).

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, see [Loading an Analysis](#) on page 152.
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.

Category: Type

- Type
- Starts on (monthly)
- Starts on (quarterly)
- Starts on (yearly)
- Starts on
- Country

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
Run	

4. Click **Start** to execute the analysis again.

Cumulative Analyses

Learn how cumulative analysis can be set.

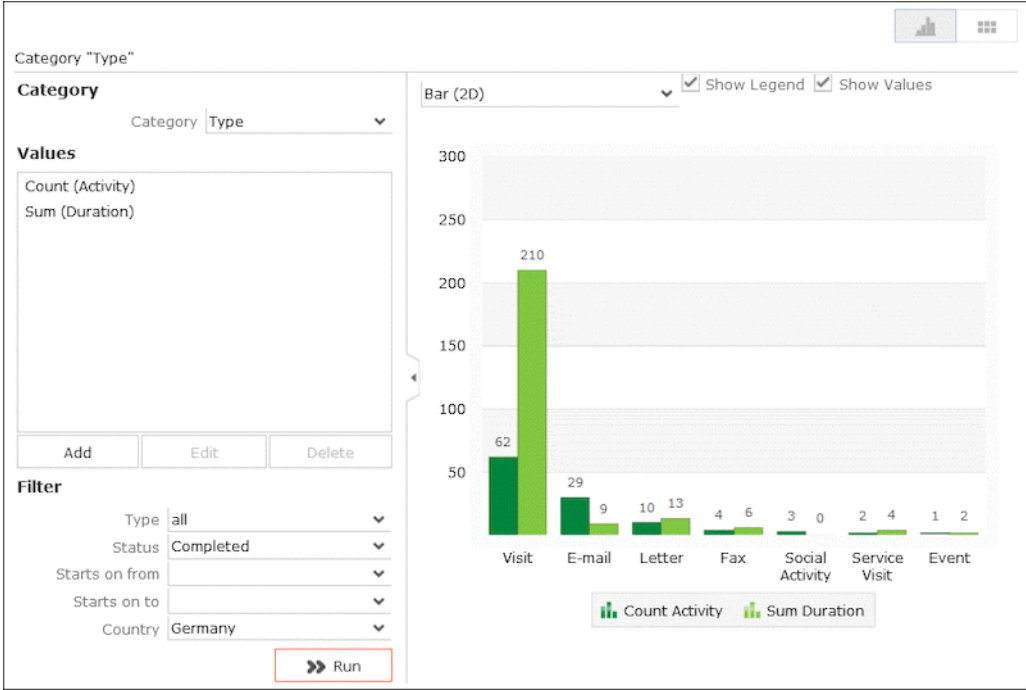
Your administrator can define (in CRM.designer) that the highest value in a column is displayed in the sum total, instead of the actual total.

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, see [Executing an Analysis](#) on page 153.
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.

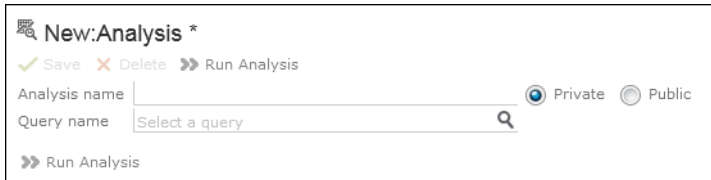



Defining Analyses

Learn to define an analysis.

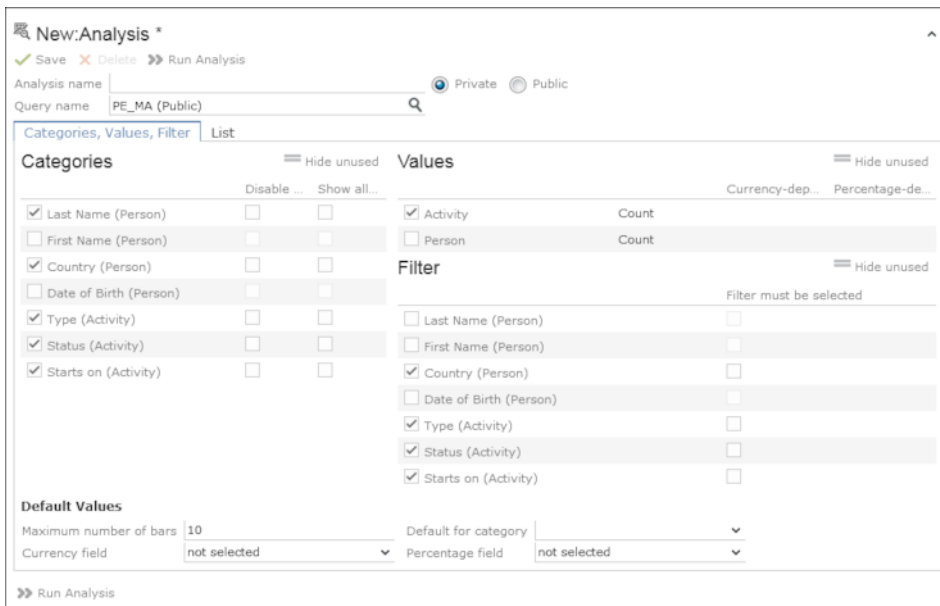
To define an analysis:

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:



6. Configure the settings as desired. Save the analysis.
The following settings options are available:

Defining Analysis Categories

To define the categories in an analysis:

1. Define an analysis, see [Defining Analyses](#) on page 156 or load an existing one.
2. Define the categories in the **Categories** 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:

- 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 or 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.

Note: If this option is checked, the output result set also includes records that do not have a relevant record id. Example of such records include, left outer joins or group by aggregations (with optional, plus, plus summed).

Defining Analysis Values

To define the values in an analysis:

1. Define an analysis, >> [Defining Analyses](#) on page 156 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 ≡ 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 156 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 are 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, see [Defining Analyses](#) on page 156 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

Learn to edit an analysis.

To edit an existing analysis:

1. Load the analysis, see [Loading an Analysis](#) on page 152.
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 are 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, see [Executing an Analysis](#) on page 153.
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"

Category		Results (8 record(s))		
Category	Type	Country	Count Activity	Count Contact Pers...
Count (Activity)		Austria	78	35
Count (Contact Person)		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.

For further details, see [Defining the Analysis List View](#).

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...	

Display Details

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

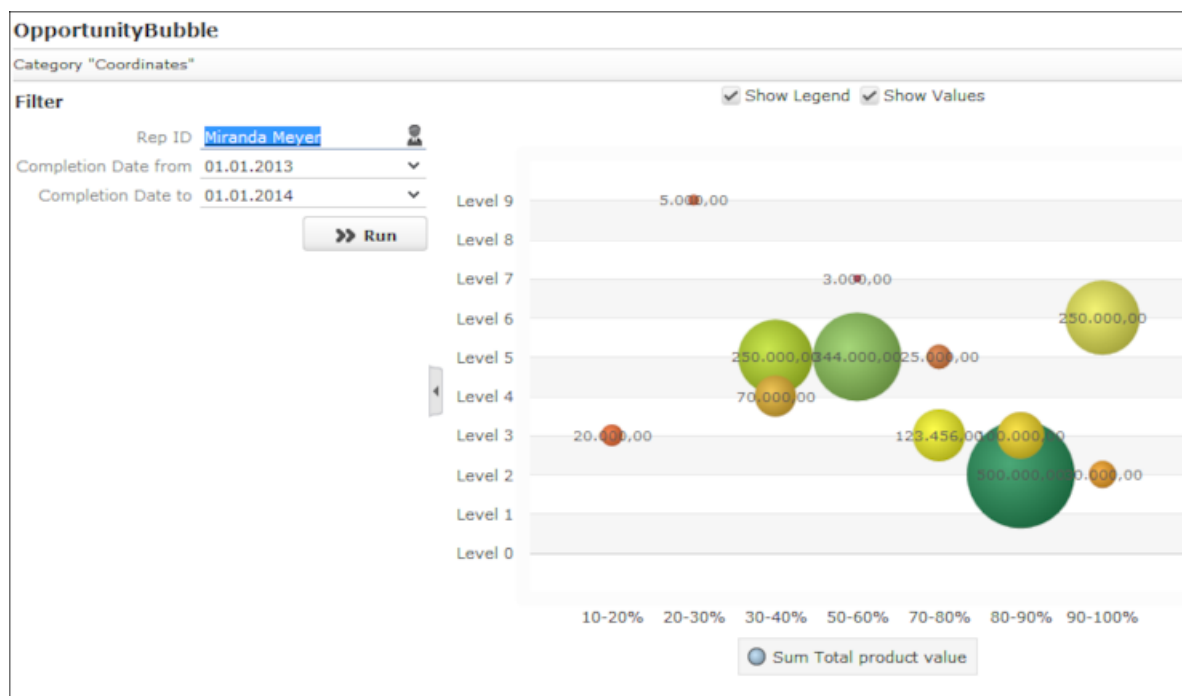
Bubble charts are analyses where data is displayed in the form of bubbles on an X-Y axis, with the size of the bubbles corresponding to a third value.

You can display bubble charts, but you cannot define parameters such as what values and categories are displayed.

By default, Aurea CRM web includes two bubble charts:

- Opportunity Bubble Chart
- Ticket Bubble Charts

Opportunity Bubble Chart example:



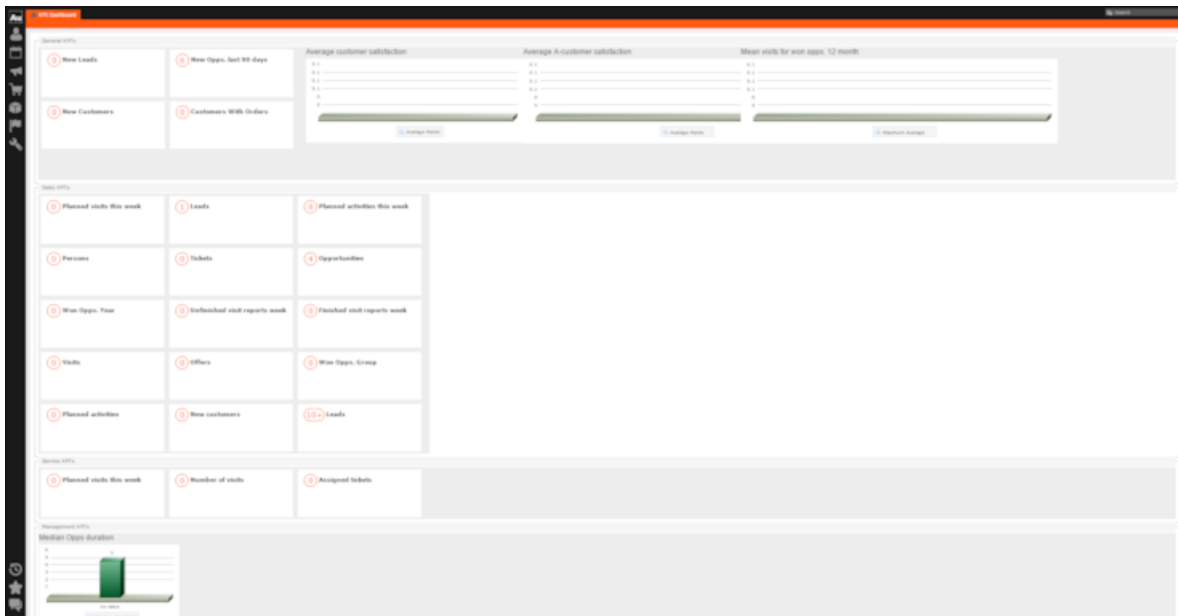
Your administrator can define additional charts.

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. Note: 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.
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).

KPI Category	Type	Name on the dashboard	Description
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.
Sales Rep	Query	Offers	Number of offers for the current sales representative.

KPI Category	Type	Name on the dashboard	Description
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.

Quick Add

The quick add function allows you to easily enter items (e.g. in offers or orders) without needing to add item records individually.

To use the quick add function, you first need to add the parent record (e.g. an order) and then add the items. Items can be selected from the item master.


Depending on the info area, various items are listed. You can restrict the number of items listed.

Each time you enter an item using the quick add function, a corresponding item record is added to the parent record.

The quick add function is available by default in a number of areas in Aurea CRM web, e.g. offers and orders. If the quick add function is available for an area, the **Quick Add** option is available from the parent record's context menu.

Switching to Edit Mode

Depending on your product version you can switch to edit mode as follows:

- Select **Quick Add (Item)** from the header record's context menu.
- Click on  (**Quick Add**)


Note: Your administrator can add a **Refresh** button to areas where entering data causes values to be recalculated (e.g. some discounts). Use this button to display the newly calculated values.

Duplicating Records

You can duplicate rows in the quick add area.

Note: You can only duplicate rows where data has been entered.

To duplicate a row:

1. Open the desired quick add area.
2. Select the desired row.
3. Click on . The duplicated record is inserted below the selected record.

Viewing Item Details in the Related Data

Information on individual item records is displayed under **Related Data** below the quick add area.

In addition to displaying details on the selected item, information can also be displayed e. g. on when the company/person was last offered or last ordered the item and what the conditions were.

Special Filters

You can restrict the items displayed in the quick add areas using predefined filters. These filters are displayed in the upper search area as buttons. Click on the desired button to apply the filter.



You can further restrict the items listed by entering additional criteria in the search mask.

Which filters are available depend on:

- The vertical you are using
- The current info area
- The configuration defined by your administrator

The following special filters are available by default, additional filters can be available depending on your configuration:


All	All items in the item master.
Overview	The items for which data has been entered.
Last Entries	All items entered for the last three records in the parent info area.

- Your administrator can define that no special filters are available.
- Your administrator can define filters that are applied automatically when using the quick add function.
- Your administrator can restrict the number of records displayed when selecting **Last Entries**.

Entering Data using Quick Add

The quick add function is similar for all info areas. The following describes entering items for an order.

To enter data using the quick add function (e.g. for an order):

1. Select  (**Sales**) > **Orders** from the menu.
2. Search for the desired order.
3. Switch to edit mode, see [Switching to Edit Mode](#).
4. The item master is listed.

Items of Offer No. 213000022

All Overview Last Entries

Item Item No., Item Name Product Group + v

Business Area X Sport + v

+ Add more ... v

Max. 15 Records / Page

Reset Start Search

Total Quantity 112,00

Net Total 4.320,00

I'm done

Item No.	Item Name	Quantity	Selling Price	Discount (%)
FB-1	Football Shirt (M)	100,00	39,00	
222-BB	Metal Baseball Bat MB100	12,00	35,00	

112,00 74,00

- Restrict the items that are listed:
 - Enter search criteria in the search mask.
 - Click on one of the buttons to apply the corresponding filter, see [Special Filters](#).
- Click on an item in the results list, and enter the desired values (e.g. quantity and end price) in the list.

Note: If you enter a quantity of '0' (zero) for an existing item, you are asked whether you want to delete it or save the item with a quantity of zero.

The shopping cart symbol (upper right corner) displays the number of items for which a quantity has been entered. The total quantity and net price of the order are displayed next to the cart.

- If you switch between items, your settings are saved automatically. You can also click on (**Cancel**) and (**Save**). Rows in the list where a corresponding item record have been added are indicated with a small shopping cart icon.
- Additional information on the selected items is displayed beneath the list of items:

Item No.	Item Name	Quantity	Selling Price	Discount (%)
FB-1	Football Shirt (M)	100,00	39,00	
222-BB	Metal Baseball Bat MB100	12,00	35,00	
			112,00	74,00

Related Data

Offer Items x

Item Name Football Shirt (M)	Item No. FB-1
Delivery Date	Product Group Sport
Product Football Shirts	Price List
Description	

9. Once you have entered all the items, click on **I'm done**.

Shopping Cart

The number of items that you have entered data for in the quick add area is displayed on the shopping cart icon:



Key values regarding the items are displayed to the right of the shopping cart.

Click on the shopping cart to display the items in the cart:

Item No.	Item Name	Quantity	Se	Show contents	scoun...
FB-1	Football Shirt (M)	100,00	39,00		
222-BB	Metal Baseball Bat MB100	12,00	35,00		
			112,00	74,00	

Shopping Cart Summary:

- Total Quantity: **112,00**
- Net Total: **4.320,00**

You cannot edit data in this overview, but you can access the quick view or display the mini details.

Deleting Data in the Quick Add Area

To delete data in the quick add area:

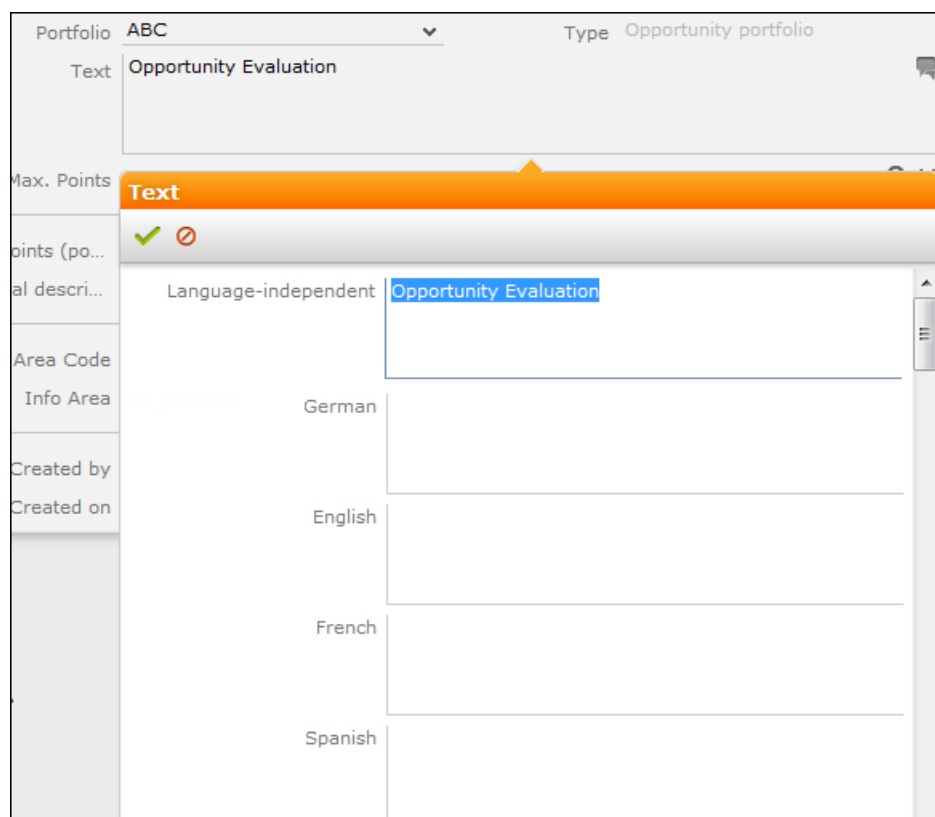
1. Click on **Overview**. The items for which data has been entered are displayed.
2. Select the item you wish to delete and click on **✗ (Delete)**.

Multilingual Texts

Your administrator can determine that you can enter texts in multiple languages.

For example, if your company has branches in multiple countries, you can define a questionnaire in the country-specific languages.

The following example displays a field in the portfolio configuration (you can only access this field if you have the necessary access rights):



The screenshot shows a configuration interface for a portfolio. At the top, there is a dropdown menu for 'Portfolio' set to 'ABC' and a 'Type' field set to 'Opportunity portfolio'. Below this is a 'Text' field containing 'Opportunity Evaluation'. A 'Max. Points' field is also visible. The main part of the interface is a table with columns for 'Language-independent' and 'Language-specific'. The 'Language-independent' column contains 'Opportunity Evaluation'. The 'Language-specific' column has rows for 'German', 'English', 'French', and 'Spanish', each with an empty input field. A green checkmark and a red 'X' icon are visible above the table. On the left side, there is a sidebar with various fields like 'Area Code', 'Info Area', 'Created by', and 'Created on'.

Your administrator is responsible for defining which languages are displayed and which you can edit.

The **✎ (Edit)** icon is displayed next to multilingual fields. Click on this icon to open the input mask for the available languages.

Note: These texts are stored in the **Text** info area; not in the info area containing the field the text is entered in. If you make changes to the multilingual texts, the modification date of the info area referencing the text (e.g. **Portfolio**) is not updated.

Notes

Notes allow you to add information that cannot otherwise be stored in the database structure.

Example - directions for reaching a customer as text.

Depending on your configuration, notes can be available in various info areas, e.g. **Company** and **Person**.

Date	Rep	Note ...	P...	Comment
13.02.2014	Helmine H...	Internal C...		Toll road required to reach customer

Social CRM

Social CRM integrates social media communication with the CRM system.

You can choose to monitor various social networks and analyze communication within the network for content relevant to your company. The social inbox contains messages related to your company from discussions in the selected social media networks.

These conversations (called twists, which includes the original message and all responses) can be used to gain a variety of insights, e.g. feedback on marketing campaigns, information on special offers made by your competitors or product defects, and allow you to react quickly before the first complaints are received by your service staff.

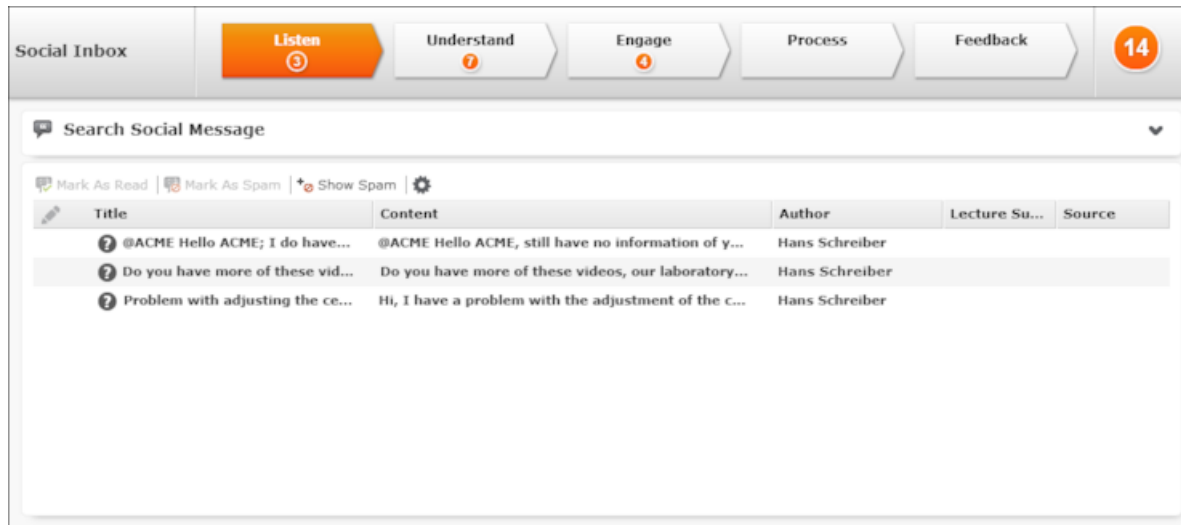
Note: Social CRM is an additional module that is not included in Aurea CRM web by default. Contact your Aurea CRM representative if you want to acquire Social CRM.

Social Inbox

Learn about social inbox for Aurea CRM.

To access the social inbox:

1. Select  (**Marketing**) > **Social Inbox**. The social inbox is displayed.



The twists are provided by the social dispatcher and are automatically imported into the social inbox.

2. Processing a twist involves the following phases:
 - **Listen:** In this phase, all relevant messages/twists from the social media platforms are listed. You can read the individual twists and need to decide whether any twists are spam. If any further processing is required, twists need to be moved to the next phase. You can mark twist as read.
 - **Understand:** During this phase, the contents are analyzed further. You can decide whether any further processing is necessary, e.g. whether a ticket needs to be created based on the contents of a message. In this case, the twist needs to be moved to the **Engage** phase. The twist can also be linked to a person in the Aurea CRM database.
 - **Engage:** During this phase, the messages are listed that need to be processed. You can create a ticket based on the twist (e.g. if the twist concerns an issue with a product) or add a new idea (e.g. if the twist concerns an idea for a new product). The twist is automatically moved to the **Process** phase after a ticket or idea is added, as adding a ticket or idea initiates other CRM processes. You can contact the author of the message, e.g. to gather additional information, or to inform the author that the problem is already being tackled.
 - **Process:** During this phase, the messages are listed that need to be processed.

- **Feedback:** During this phase, the messages are listed whose processing has been completed. You can inform the author of the twist of the results.
- **Closed:** This phase is not displayed. All closed twists are moved to this phase for archiving purposes.

Social Inbox Dashboard

The social inbox dashboard consists of the following elements:

The screenshot shows the Social CRM Social Inbox Dashboard. At the top, there is a header with five phase arrows: Listen (3), Understand (7), Engage (4), Process, and Feedback. A total message count of 14 is displayed on the right. Below the header is a search bar labeled 'Search Social Message'. The search results are displayed in a table with columns: Title, Content, Author, Lecture Su..., Source, and Person. The 'Twist Messages' section shows a table with columns: Date, Time, Author, Content, and Me... The 'Twist Details' section shows information for a specific message, including Site, Relevance, Title, and Content.

- **Header:** Click on the phase arrows in the header to switch between phases in the social inbox. Hover the mouse cursor over a phase arrow to display information on that phase in a tooltip.

The current phase is highlighted in orange. The number of messages in each phase is displayed beneath the name of each phase. The total number of messages is displayed on the far right.



- **Search Results:** The search results list the messages in the currently selected phase. The individual messages are displayed here. Click on a message to display all messages in the same twist in the **Twist Messages** area below the search results.

- **Twist Messages:** If you click on an entry in the search results, all the messages in the same twist are displayed here:
 - The original message posted to the social media platform
 - The individual responses you posted to the social media platform from the social inbox
 - All replies and comments from other persons on the social media platform who were involved in the discussion
- Information on the sender and content of the currently selected message are displayed to the right of the **Twist Messages** area. If available, additional **Twist Details** are also displayed.

Each of these areas has its own toolbar, which can be used to process the messages. For example, you can flag spam using the **Mark As Spam** button in the search header (to flag a message as spam) and the **Mark Twist as Spam** button under **Twist Messages** (to flag a twist as spam).

Message Types

In order to distinguish between different messages, they are split into various types in the **Twist Messages** area.

- To the left of the message:
 -  (Inbound): Messages originating from the social media platform.
 -  (Outbound): Messages sent from the social inbox.
- In the **Message type** column:
 - Initial: The initial message. The twist starts with this message.
 - Answer: Outgoing messages, i.e. those sent from the social inbox.
 - Reaction: An incoming message in reply to an answer.
 - Related: All messages that are not one of the previous types.

Marking Twists as Read




Unread twists are displayed in bold.

Select a twist and click on  (**Mark As Read**) to flag the twist as having been read. It is then no longer displayed in bold.

Marking Messages as Spam

You can flag individual messages as spam in the search results, or the entire twist (under **Twist Messages**). These messages are no longer displayed.

To mark a twist or message as spam:

1. Select the desired twist or message.
2. Click on  (**Mark As Spam** or **Mark Twist as Spam**).
3. Click on  (**Show Spam**) in the search results header to display messages marked as spam. The button changes to  (**Hide Spam**). Click on the button again to view the messages and twists not marked as spam.

Moving Twists Between Phases


You need to manually move twists from the **Listen** phase to the **Understand** phase, and from the **Understand** phase to the **Engage** phase.

To do so, click on  (**Move Twist to "[Phase]"**).

Determining the Sentiment and Relevance of a Message

You can enter the sentiment (good, neutral, bad) and relevance of the message to your company. You can enter this information starting from the **Understand** phase, allowing you to determine priorities and in order to better analyze the data at a later date.

To enter the sentiment or relevance of a message:

1. Select a message in the desired twist in the search results and select the desired message in the twist under **Twist Messages**. The details of the message are displayed on the right.
2. Click on  (**Edit**).
3. Enter the **Sentiment** and **Relevance**.
4. Save.

Invite Authors to Join Other Social Media (Opt-in)


You can send the author of a message an invitation to join another social media network (e.g. your company's community) in order to take part in further discussion, e.g. CRM.loop, where you can manage customer's ideas and feedback. The invitation includes a link where the author can access the social media platform. If the author logs on to the platform, the **Opt-in status** field in the social profile is automatically set to "Successful".

To invite an author, switch to the **Engage** phase and click on  (**Invite to...**) in the **Twist Messages** area.

Linking Messages to a Person

You can link a message to a person in the Aurea CRM database (provided you comply with applicable data privacy and protection legislation). This option is available in all phases apart from the **Listen** phase.

To link a message to a person:


1. Select a message in the desired twist in the search results. All messages in the twist are displayed under **Twist Messages**.
2. Select the desired message and click on  (**Assign Person**).
3. Search for and select the desired person or add a new person. The message is linked with the person (using a social profile record).

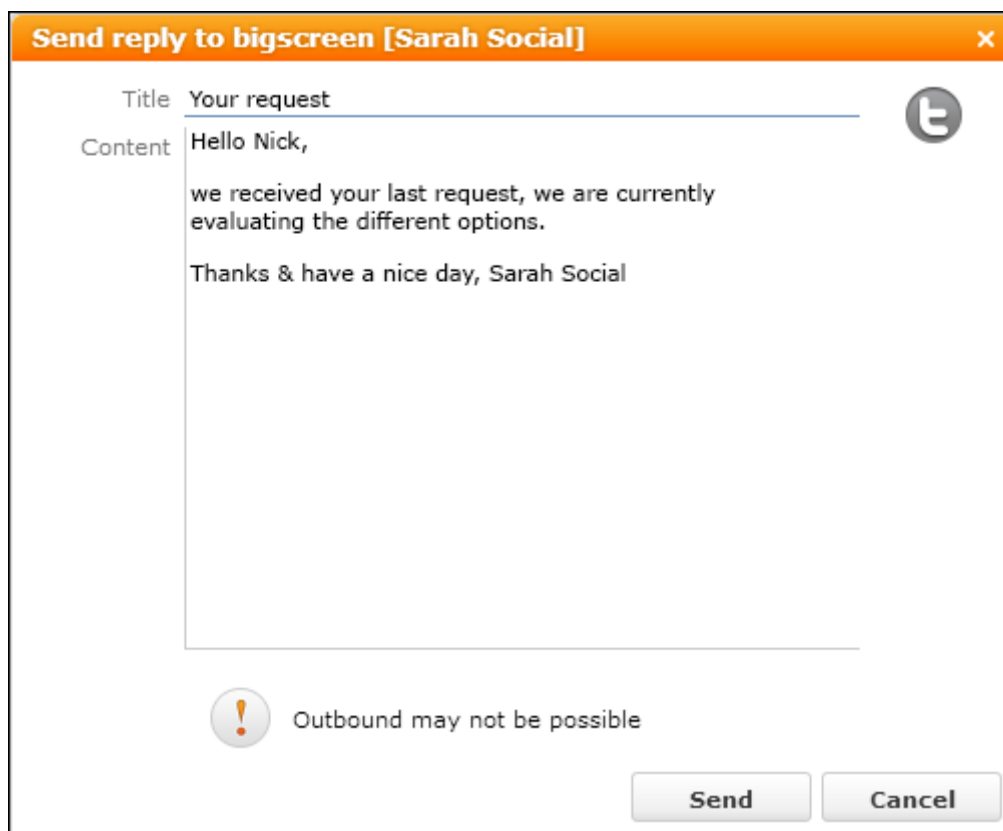
Sending Messages to an Author

From the **Understand** phase onwards, you can reply to the author of a message directly from the social inbox, e.g. to inform them that their complaint is being handled.

In order to be able to contact a person, they must be stored in the Aurea CRM database and the message must be linked to the person, see [Linking Messages to a Person](#).

To send a message to an author:

1. Select the desired message in the appropriate phase.
2. Click on  (**Respond**).




3. Write your reply and send it. The message is sent to the social media platform that the original message was posted to.

Creating a Ticket for a Message

If a twist concerns a problem, you can add a corresponding ticket. You can also link the message to an existing ticket if the problem is already known. Once the ticket has been added, the twist is automatically moved to the **Process** phase.

The ticket is then processed by the responsible service employee, see Customer Service in the vertical-specific manual.

To add a ticket:


1. Switch to the **Engage** phase.
2. Select a message in the desired twist in the search results and select the desired message in the twist under **Twist Messages**.
3. Click on  (**Create Ticket**) and choose whether to add a new ticket or link the message to an existing ticket.
4. Enter the ticket's details and save it.

This ticket needs to be assigned to a service employee. Once the ticket has been processed or if the responsible rep has additional information (e.g. the solution is included in the next service pack), this information needs to be transferred to the social inbox message. Once this occurs, the twist is automatically moved from the **Process** phase to the **Feedback** phase.

Adding an Idea from a Message




If a twist discusses ideas such as feature requests that affect product development, you can add an idea. The idea is linked to both the author's person record and the message. The twist is automatically moved to the **Process** phase.

To add an idea:

1. Switch to the **Engage** phase.
2. Select a message in the desired twist in the search results and select the desired message in the twist under **Twist Messages**.
3. Click on  (**Create Idea**).
4. Enter the details and save.

Linking a Twist to a Ticket or Idea

You can link a twist to an existing ticket or idea:


1. Select  (**Marketing**) > **Twists**. Select a **Stage** and click on **Start Query**.
2. Click on  (**Quick View**) and click on **Open** in the quick view.
3. The record is displayed in tab view.
4. Double-click on the record to switch to edit mode.
5. Click on  (**Select**) next to the **Ticket** or **Idea** field to select the record you want to link the twist to. When linking a twist to a ticket or idea, activities of the type **Social** are added automatically and are linked to the ticket or idea.

Sending Feedback to an Author

Once a ticket has been processed, the **Write Feedback to Social Inbox** option is available in the ticket (provided the ticket is linked to a twist). Once the service employee sends the feedback, the associated twist is automatically move to the **Feedback** phase.


The text entered by the service employee is displayed in the **Feedback** field under **Twist Details**. The rep responsible for the social inbox can use this information to send feedback to the author of the message.

Closing Twists

You can close a twist in any phase. The twist is then moved to the **Closed** phase. Note that this phase is not displayed in the dashboard. Click on  (**Close Twist**) to close the twist.

Changing the Phase of a Twist


If you have moved a twist to the next phase by mistake, you can move the twist back to the previous phase.

1. Select  (**Marketing**) > **Twists**. Select a **Stage** and click on **Start Query**.
2. Select the desired phase type from the context menu.

Opinion Leaders

Opinion leaders are persons that are heavily engaged in discussions on social media platforms. You can determine that persons who have posted at least a certain number of messages are classified as opinion leaders. You can display these opinion leaders.

To display opinion leaders:

1. Select  (**Marketing**) > **Key Opinion Leaders**.
2. Enter the minimum number of posts required by opinion leaders in the **Number of records** field.
3. Click on **Start Query**. All persons who have posted at least this number of messages are listed.
4. Select the desired option from the context menu to further process the record.

Communication Flow

You can display an analysis of the number of messages in each phase in the social inbox.

To analyze the communication flow, Select  (**Marketing**) > **Social Inbox Flow Analysis**. The analysis is displayed.

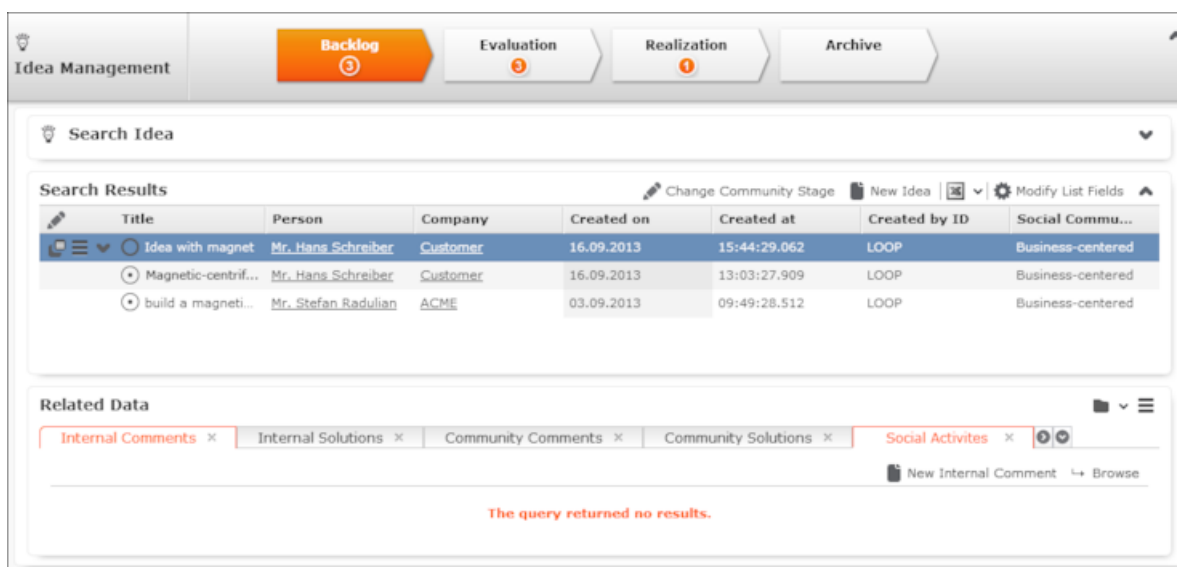
Idea Management

Learn to add and manage ideas on Aurea CRM web.

Note: The idea management process is part of a separate module, that is not included in Aurea CRM web by default. Contact your Aurea representative if you wish to use the idea management process.

To edit ideas:

1. Select  (**Service**) > **Idea Management**. The **Idea Management** area is displayed.



The screenshot shows the Idea Management interface. At the top, there are four tabs: Backlog (selected), Evaluation, Realization, and Archive. Below the tabs is a search bar labeled "Search Idea". Underneath is a table of search results with columns: Title, Person, Company, Created on, Created at, Created by ID, and Social Commu... The table contains three rows of data. Below the table is a "Related Data" section with several tabs: Internal Comments, Internal Solutions, Community Comments, Community Solutions, and Social Activites. A message at the bottom of the Related Data section states "The query returned no results."

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



2. The idea management process consists of the following phases:

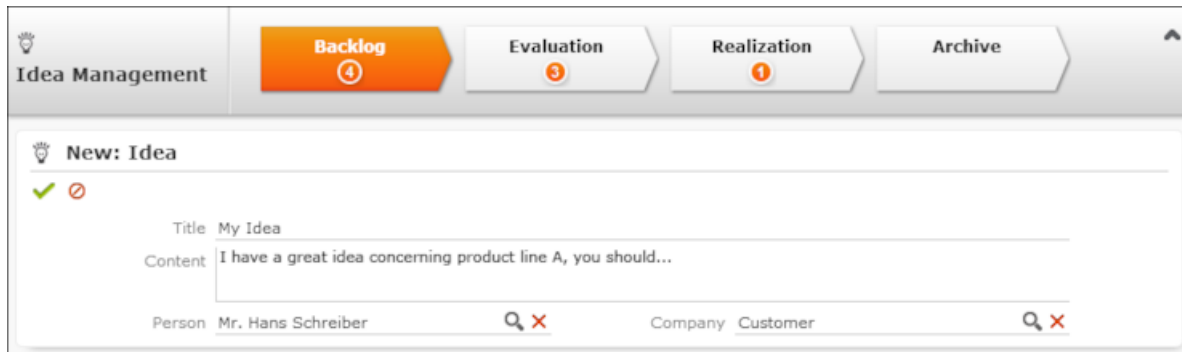
- **Backlog:** In this phase, all relevant ideas from the social media platforms are listed. The responsible rep needs to decide whether further processing is necessary. Feedback can be sent to the person who submitted the idea, move the idea to the next phase or move the idea to the **Archive** phase.
- **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. You can:

- Select  (**Service**) > **New Idea**.
- Click on  (**New Idea**) in the idea management process. 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  (**Select**) to link the idea to a **Person** or **Company** in the database.
3. Click **Save**. 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 and **Click Save**.

Changing the Community Phase of an Idea


To change the community phase of an idea:

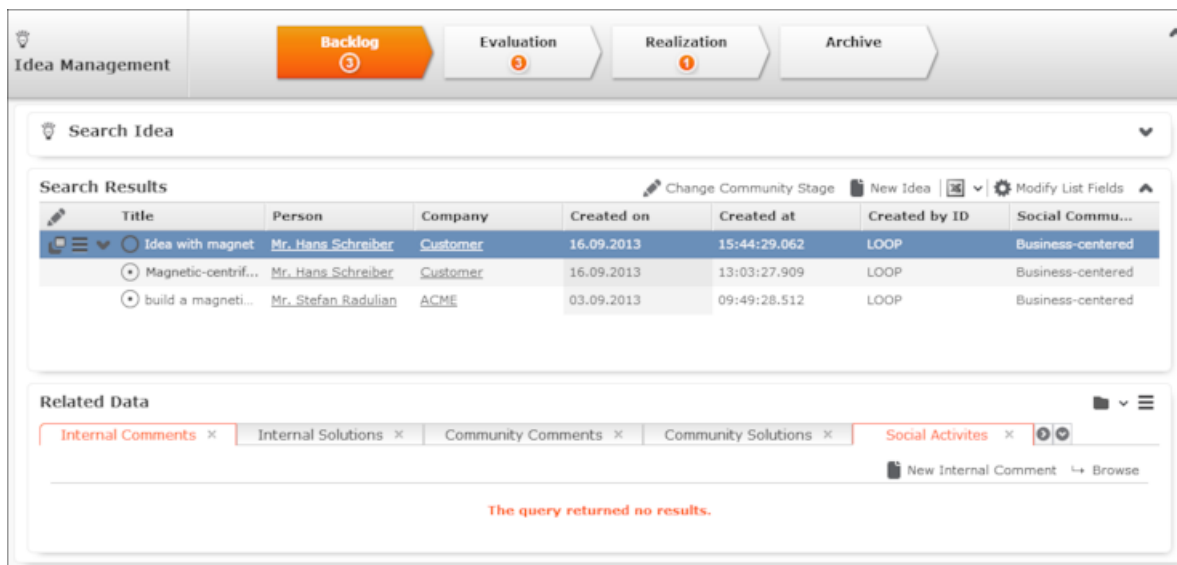
1. Select  (**Service**) > **Idea Management**.
2. Select the desired idea from the search results.
3. Click on  (**Change Community Stage**).
4. Select the desired phase, e.g. "Voting Pool" or "Implemented".
5. Click **Save**.

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 navigation tabs: 'Backlog' (3 items), 'Evaluation' (3 items), 'Realization' (1 item), and 'Archive'. Below this is a search bar labeled 'Search Idea'. The search results are displayed in a table with columns: Title, Person, Company, Created on, Created at, Created by ID, and Social Commu... (Social Community). The table contains three rows of data. Below the search results is a 'Related Data' section with tabs for 'Internal Comments', 'Internal Solutions', 'Community Comments', 'Community Solutions', and 'Social Activites'. The 'Social Activites' tab is currently selected. Below the tabs, 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.

Yammer

Yammer provides a chat function for **company-internal** communication, which can be integrated in Aurea CRM web on demand.

Note: Aurea CRM web includes a Yammer interface, but Yammer **needs** to be configured accordingly. Contact your Aurea representative if you wish to use Yammer.

You need to register your company for yammer at <http://www.yammer.com>. Depending on which functions you wish to use, you can choose between a free and pay model. Aurea CRM web supports both options.

When registering, you are issued with an ID that can be used to integrate Yammer with Aurea CRM web. Registered employees can log on to the Yammer network using their login data (company e-mail address and Yammer password).

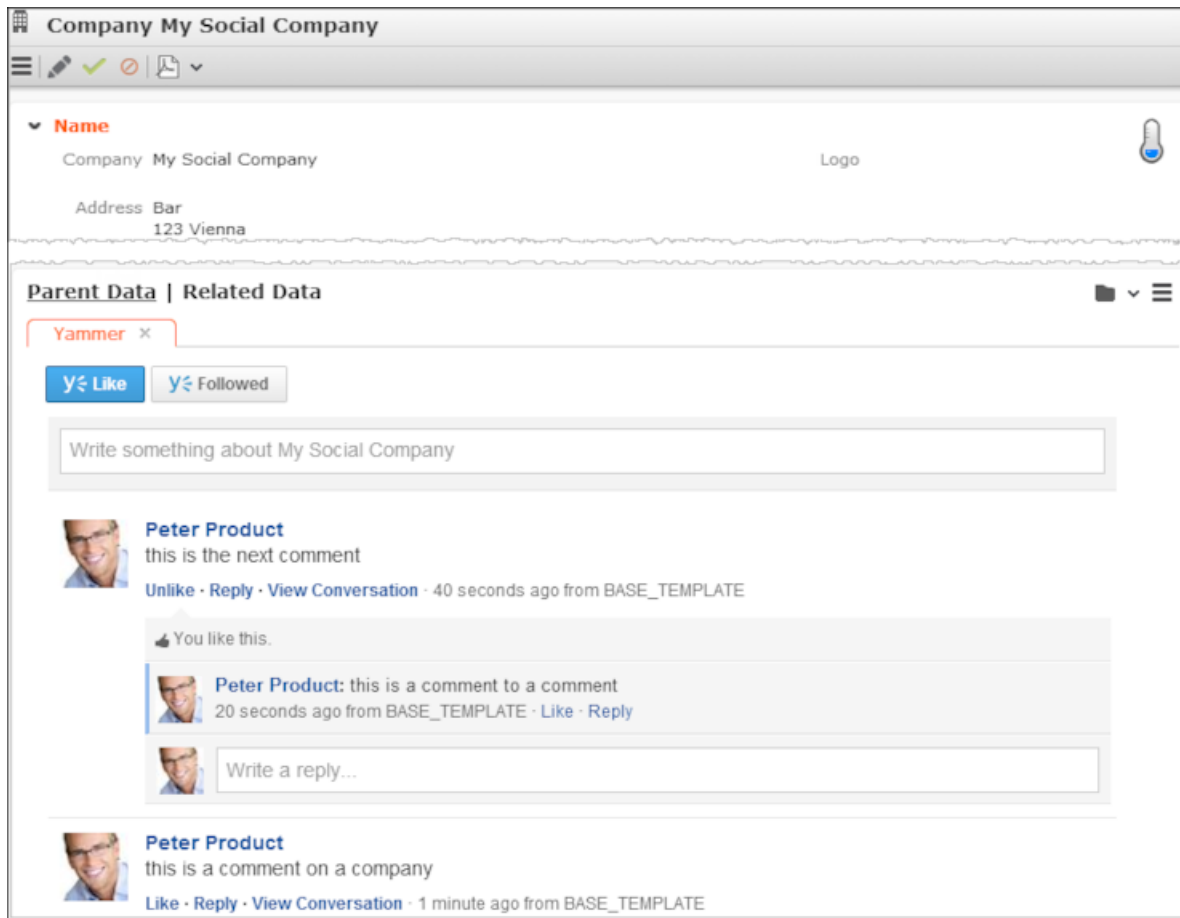
Your company can determine which info areas provide access to Yammer. For example, your company can choose to allow chats to be created for companies and opportunities in Aurea CRM web. News feeds are displayed in both applications as follows:

- The news feed for a record (e.g. a company or opportunity) is displayed in the **Yammer** tab in Aurea CRM web, see [News Feed in Aurea CRM web](#).
- Feeds are collated to form a project in Yammer, see [Projects in Yammer](#).

Information (e.g. concerning an opportunity) can thus quickly be made available to all employees or members of a project group.

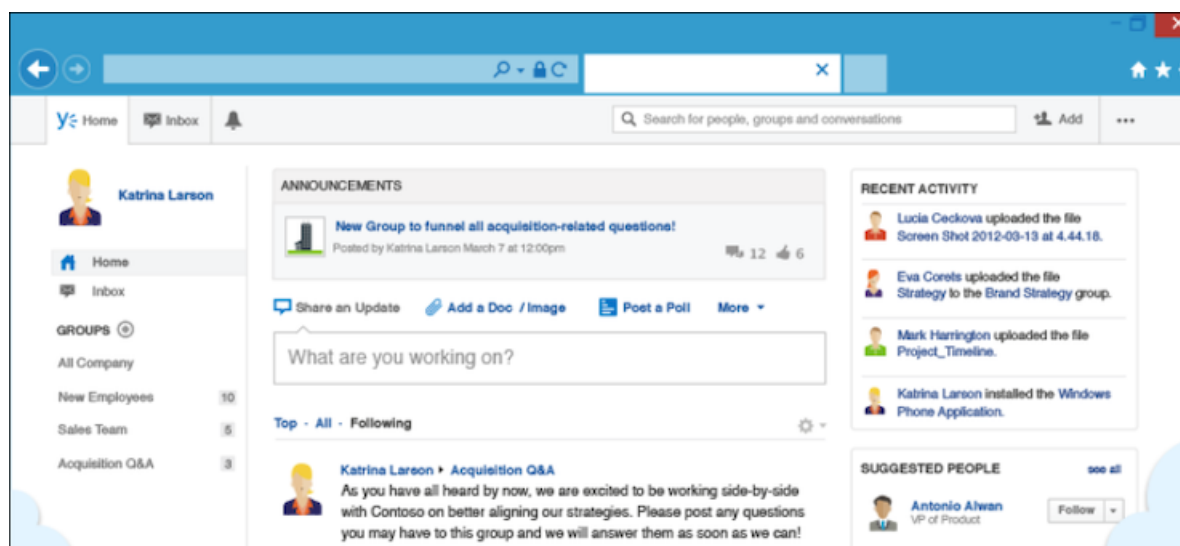
News Feed in Aurea CRM web

The **Yammer** tab is available in info areas associated with a Yammer project. Only conversations concerning the current record are displayed in this tab:



Projects in Yammer

All registered users' news feeds are displayed in Yammer at www.yammer.com/<Your Company>.




Note: Access rights assigned in Aurea CRM web do not apply to Yammer. For example, access to opportunities can be restricted in Aurea CRM web (e.g. to just sales staff). If Yammer is linked to opportunities, sales reps can log in to Yammer from opportunity records and post messages. These messages are however visible to **all** users in Yammer (and not just to users that can access opportunities), and all users can reply to messages there.

Daily and Weekly Overview


Yammer includes daily and weekly summaries (digests) that inform users about ongoing conversations. These digests are sent via e-mail.


Reply Reply All Forward

Di 28.01.2014 14:36


 ACME Internal Network on Yammer <noreply@yammer.com>
Your Yammer activity for Tuesday, January 28


To Birgit Harthum


 If there are problems with how this message is displayed, click here to view it in a web browser.




Daily Digest for Tuesday, January 28

 2 conversations have 3 new messages


 **Peter Product:** this is the next comment
[My Social Company](#)
04:10 AM - Jan 27 / [Reply](#)

 **Peter Product:** this is a comment to a comment
04:10 AM - Jan 27 / [Reply](#)

 **Peter Product:** this is a comment on a company
[My Social Company](#)
04:10 AM - Jan 27 / [Reply](#)

[View all messages on Yammer.com »](#)

[Receive this weekly](#)


Yammer Inc., 1355 Market Street, 3rd Floor, San Francisco, CA 94103. To change your notifications settings, go [here](#).

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. For further details, see [Installing CRM.launcher](#) on page 186.

CRM.launcher is required for:

- Mass mailings
- Quick campaigns
- Checking out documents
- Aurea CRM web offline
- CRM.phone (if installed)

Aurea CRM web communicates with the CRM.launcher when it has to perform these functions that require other applications that are outside your web browser's sandbox.

To ensure secure communication between Aurea CRM web and the CRM.launcher, you are asked to authorize the communication between the CRM web and the CRM.launcher. On approval, CRM web generates and stores a token specifically for your future sessions with the CRM web server. Tokens are renewed every 30 days and consequently CRM Launcher periodically prompts you for authorization.

See the screenshot below.



Note: If you switch to a different browser, or clear your browser's cache you are prompted to authorize the communication again.

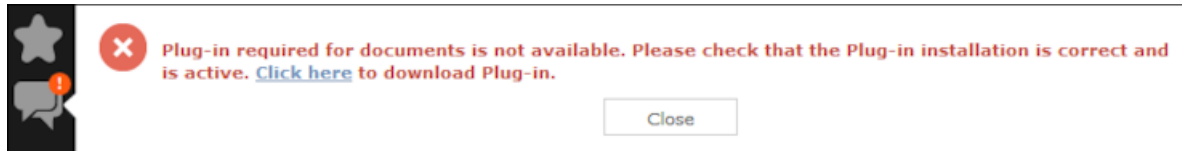
Note: Aurea software recommends using Google Chrome as your browser, as problems may occur under certain circumstances when using Firefox. If you are using Mozilla Firefox, you may be unable to perform actions (e.g. check out a document) despite CRM.launcher being installed. In this case, switch to another browser (Google Chrome or Internet Explorer). If you need to work with Mozilla Firefox, contact your administrator.

Installing CRM.launcher

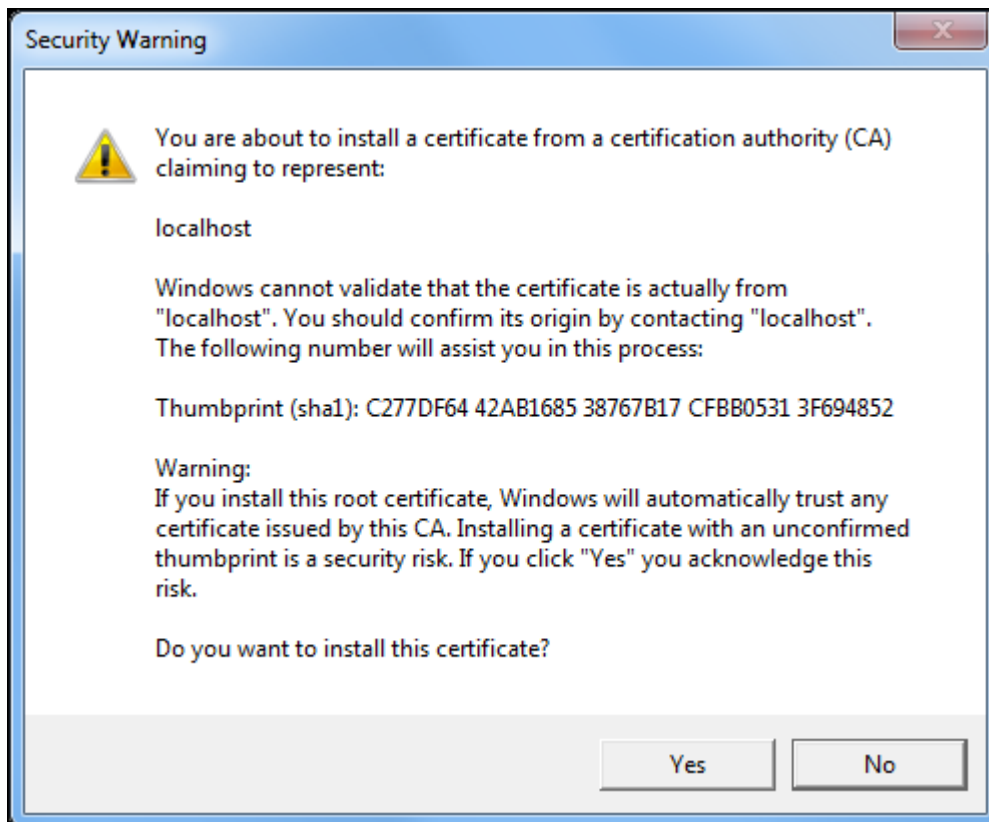
Learn to install CRM.launcher.

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

Learn about the tasks that can be performed from 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**, see [Check for Updates](#).
 - **Open offline CRM** or **Open online CRM**, see [Starting Aurea CRM web offline in Offline or Online Mode](#).

Note: These options are only available if you have installed the latest version.

- **Settings**, see [Switching Languages](#), [Creating Bug Reports](#) and [Port Settings](#).
- **Exit**

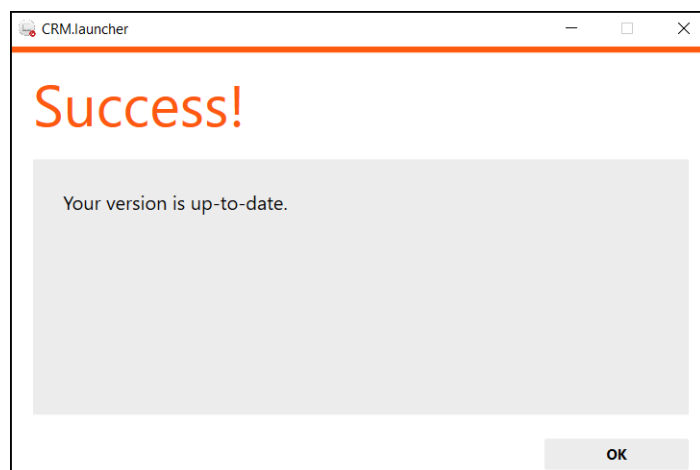
Check for Updates

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).

Aurea CRM web offline


To work in offline mode, you require 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: 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, see [Roles and CRM Processes](#) on page 15. 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), see [Aurea CRM web Administrator Guide](#).

Note: You also require the necessary access rights to define characteristics, relationship levels, exchange rates etc. These options are therefore also accessible from the **Settings** menu. These records are however described in the relevant chapters of the User Manual.

Template Configuration Table

The contents of the template configuration table is used in various info areas.

For example, one of the entries determines which e-mail template is used when a rep sends an offer to a customer.

Select **Settings**  > **Maintenance** > **Template Config. Table** to open the template configuration table.

Note: Verify the contents of this table carefully and customize the entries to the needs of your company.

Displaying All Fields

Learn to display all fields in records.

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 | ½↓ 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.


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 Cache** . 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.

Opportunity Criteria Values

Learn to create new opportunity criteria values or edit existing one.

Select **Settings**() > **Maintenance** > **Opportunity Criteria Values** from the menu to manage the criteria used by opportunities. For example, these criteria are used to calculate the values on the **Targets & Evaluation** tab in opportunity records, e.g.:

1. Requirements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Attitude	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Solution	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4. Budget	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. BC covered	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
6. Competitor	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Relationship	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

By default, numerous criteria are predefined, and these criteria are used in various phases of the opportunity process. You can add new criteria or customize the existing criteria to meet your needs.

1. Select  (**Settings**) > **Maintenance** > **Opportunity Criteria Values** to display a list of all opportunity criteria.

Search Opportunity Criteria Values

Opportunity Typ ▼

Criteria Value ▼

+ Add more ... ▼

Criteria ▼

max. 15 ▼ Records per page

Reset
Start Search

Search Results << < 1 - 15 of 15+ > >> New x ▼ Modify List Fields

	Opportu...	Criteria	Criteria ...	Value	Factor	Value x ...	Max. Val...	Max. Val...
	Cross Selling	Attitude	Very negative		1,00		100,00	100,00
	Cross Selling	Budget	No Budget av...		1,00		100,00	100,00
	Cross Selling	Competitor	Multiple stron...		1,00		100,00	100,00
	Cross Selling	BC covered	No personal ...		1,00		100,00	100,00
	Cross Selling	Needs	No need for ...		1,00		100,00	100,00
	Cross Selling	Relationship	Decision mak...		1,00		100,00	100,00
	Cross Selling	Solution	Requirement...		1,00		100,00	100,00
	Cross Selling	Solution	Requirement...	25,00	1,00	25,00	100,00	100,00

2. Click on **+** (**New**) to add a new entry.
3. Enter the data and **Save** the record.

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 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, see [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.

Maintaining Catalogs

To carry out catalog maintenance:

1. You can access catalog maintenance in the following ways:
 - From the desired info area when in editing mode:
 1. Click on **+** (**Add/Find Catalog Value**) next to the desired catalog field.
 2. If you have the administrator access rights, click on the **Go to Catalog Maintenance** link in the dialog. This link is not displayed if you do not have administrator privileges.
 - From the **Settings**() menu:
 1. Select **Settings**() > **Maintenance** > **Catalog Maintenance** .

The search is dis-

played.

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**.

The corresponding catalog values in the selected languages are listed.

4. Double-click on an entry to edit it.

2. The following dialog is displayed:

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.

3. Enter the desired values.
4. 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 needs 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](#). The mass data update function is intended for large volumes of data.

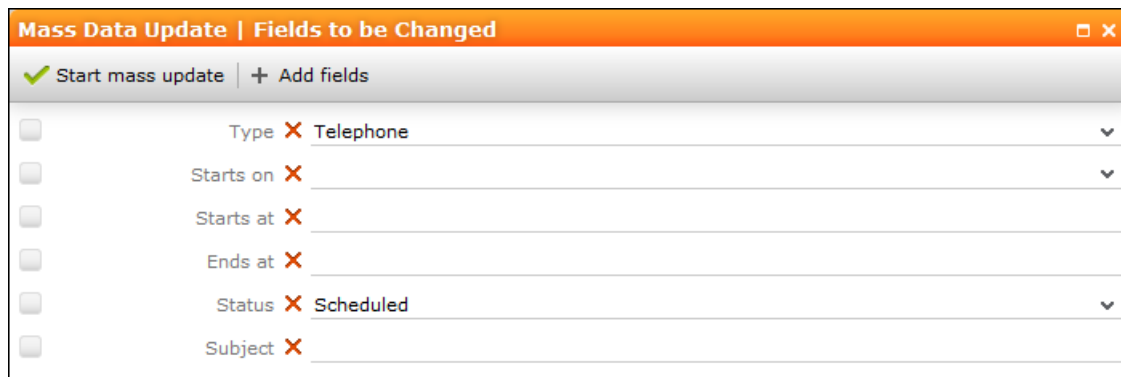
The info areas and fields you can edit depend on your access rights.

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, see [Searching](#) on page 57.
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.

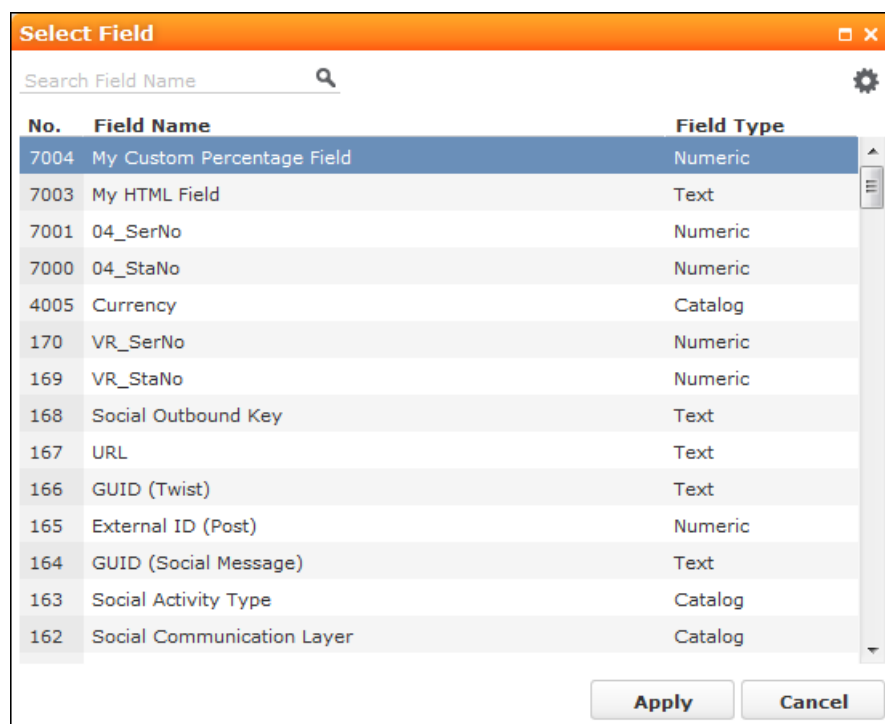


7. Enter can add further fields to this dialog, see [Adding Fields](#). Click on **✕ (Remove Field)** to remove a field from the dialog.
8. If you enter a new value to be entered in the field, the check box to the left of the field is enabled automatically.
9. Enable the check box without entering a value for the field to remove existing values in that field.
10. Click on **Start Mass Update**. You are 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, see [Mass Data Updates](#) on page 196.
3. Click on **X (Delete)**. You are 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

Learn to import data.

You can import data, e.g. from an CSV file.

To import data:

1. Select **Settings** () > **Maintenance** > **Import** . The **Import** dialog opens.

Note: Your administrator can also define buttons available in info areas that can be used to import data into just that info area.

The screenshot shows the 'Import' dialog box with the following components:

- Format:** FI
- File:** Select File (No file selected)
- 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** button

- 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.

- 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 are 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 tool-tip 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


Learn to manage 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.

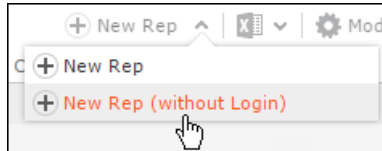
- The following module access rights are assigned automatically: web, groupware connector and Communication.
8. You can assign one or more roles to the rep in the **Add Role(s)** phase. Select the desired roles and click on **Assign Selected Roles** to assign the roles to the rep.
 9. After completing 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. Reps can be set as **Inactive**, and you can determine whether the end customer is invoiced for the user using the **Billable** field. You can also determine that a rep should be set to inactive from a specific date onwards (**Deactivated from** field).

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:
 - **Settings:** Settings such as the language, tenant, superior and deputy.
 - **Rights :** The rep's organizational group, station number and station/group and rep access rights etc.
 - **Connector settings:** Allows you enable the connector settings and define which data to synchronize.
 - **Contact Data:** The rep's contact data.
 - **Signature:** The rep's signature, entered in e-mails sent by the rep.
 - **Working Hours:** The rep's work hours.
 - **Offline:** Settings for Aurea CRM web offline.

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.

Search Results	
Name	Login role
TE_Administration_LSI	Administration
TE_Administration_Catalogue_LSI	Administration Catalogue
TE_Analytics	Analytics
TE_Backoffice_LSI	Backoffice
TE_Customer_Core (Template)	CRM Social Productmanager
CU_Country (Template)	Customer Core
	Customer Country

Menu	
Add Role(s) for Rep	

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 Additional Tenants

You can assign multiple tenants to reps that require access to the data of more than one tenant.

To assign an additional tenant:

1. Switch to the desired rep.
2. Switch to the **Rep Add. Tenant** tab under **Related Data**.
3. Click on **+** (**New**) to assign additional tenants.

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.

Service Templates

Learn about Service Templates.

Defining Service Templates

To choose a service template for either offers or reports:


1. Switch to the service offer or service report you wish to use as the template.
2. Select **Use as Service Offer/Service Report Template** from the context menu.

By default, two predefined service templates are available (service offer template and service report template):

Service Offer Template

Whenever a user adds a new service offer, the offer is added based on the service offer template. You can check which template is currently in use.


To view the current service offer template:

Select **Settings** () > **Maintenance** > **Service Templates** > **Service Offer Template** . The current service offer template is displayed.

Service Report Templates

Whenever a user creates a new service report, the report is generated based on the service report template. You can check which template is currently in use.

To view the current service report template:


Select **Settings** () > **Maintenance** > **Service Templates** > **Service Report Template** . The current service offer template is displayed.

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-Dos** .
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, see [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 Field Name Subject

Stat. No. _____ Station

Z6_TenNo _____ Tenant Name

Rep Group ID _____ Rep ID _____

Language No. _____ Language

Country _____ Login role _____

Default

Variable Value

Catalog Text _____ Var. Rep ID _____

Var. Date _____ Var. Time (s) _____

Var. Decimal _____ Var. Logical

Var. Number _____

Var. Text _____

- 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. Rep ID _____

Var. Date _____ Var. Time (s) _____

Var. Decimal _____ Var. Logical

Var. Number **123**

Var. Text _____

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.

Click on α (**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.

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.

CRM.designer Maintenance

Learn about CRM.designer maintenance in this topic.

If the data model, catalogs or CRM processes and roles are edited in the CRM database, these changes need to be applied to the CRM.designer database in order to apply them to Aurea CRM web. Use CRM.bulkloader for this purpose. Catalogs, the data model and CRM processes and roles can also be updated in Aurea CRM web without using CRM.bulkloader if you have the necessary access rights.

For more information, see [CRM.bulkloader](#) in the *Aurea CRM web Administrator Guide*.


The manual can be downloaded from Aurea's support area (<https://support.aurea.com>).

If you cannot access the support area, contact your Aurea representative.

Updating Catalogs in CRM.designer

If changes have been made to catalog values, changes are applied to the catalogs in the CRM.designer database by either comparing either the catalog value's code (index) or the catalog value in the catalog base language and its tenant number. If no matching catalog value is found in the CRM.designer database, a new value is added. If a matching entry is found, the catalog values in the other languages are updated.

To update catalogs in the CRM.designer database:

1. Select **Settings** () > **Maintenance** > **CRM.designer Maintenance** and switch to the **Catalogs** tab.
2. Choose whether to display variable or fixed catalogs.
3. Enable the check box next to the catalogs you want to update.
4. Click on **Show all catalogs (including catalogs with no data in the CRM.designer database)** to display all catalogs in the Aurea CRM database, including catalogs that have not been transferred to the CRM.designer database.

Note: This options increases the time taken for Aurea CRM web to start; Aurea therefore recommends **not** enabling this option.

5. Enable **Synchronize catalogs by code** to match up catalog entries using the catalog code (the index of each entry in the catalog) instead of the text in the catalog base language and the tenant number.


Note: Aurea does **not** recommend using this option.

6. Click on **Update Selected Catalogs**.

Data Model Administration

You can update the information stored on the Aurea CRM data model in CRM.designer. Names of elements in your data model are stored in CRM.designer in the language you are currently logged in with.


To update the data model:

1. Select **Settings** () > **Maintenance** > **CRM.designer Maintenance** and switch to the **Data Model** tab.
2. Enable the **Only fill temporary tables; do not update the CRM.designer database** option if you want to verify the changes before updating the database.
3. Click on **Update the Data Model in CRM.designer** to update the data model.

CRM Processes & Roles

You can update the information stored on CRM processes and roles in the CRM.designer database.

To update this data:

1. Select **Settings** () > **Maintenance** > **CRM.designer Maintenance** and switch to the **Processes & Roles** tab.
2. Select **CRM Processes** and/or **Roles** to determine what to update.
3. Enable the **Only fill temporary tables; do not update the CRM.designer database** option if you want to verify the changes before updating the database.
4. Click on **Update CRM Processes & Roles** to update the CRM.designer database.

Customizing Configurations in CRM.designer

Your administrator can determine that you can customize certain Aurea CRM web configurations in CRM.designer.

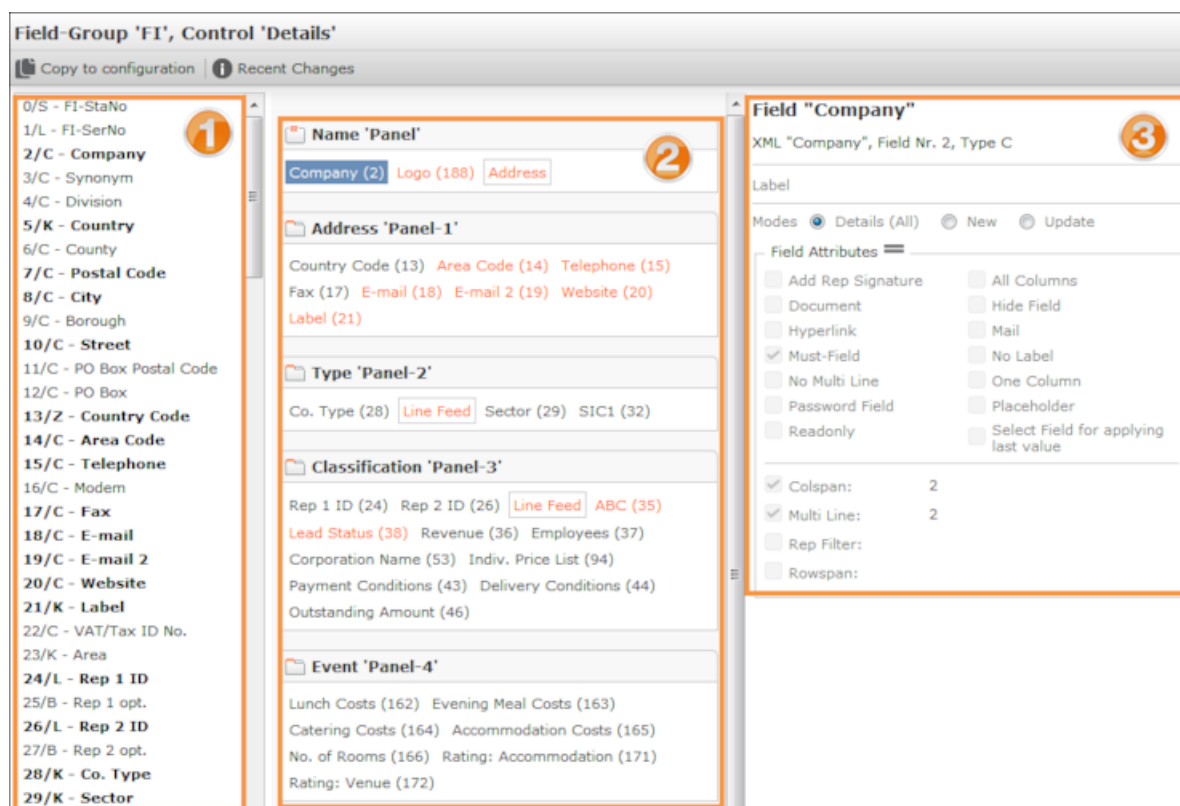
CRM.designer is started automatically when you click on the corresponding button. Your options when accessing CRM.designer from within Aurea CRM web are limited.

The following chapter provides you with a short overview of the available functions. The available functions depends on your access rights.

A detailed description can be found in the Aurea CRM web Administrator Guide, it can be downloaded from <https://support.aurea.com>. If you cannot access the support area, contact your Aurea representative.

CRM.designer User Interface

The following example shows the CRM.designer user interface elements that you can access from Aurea CRM web:




The CRM.designer window consists of the following areas:

- A **header** containing the name of the field group (FI in this example) and the displayed controls ("Details" in this example)
- A **toolbar** with various buttons.
- A **list of available fields** in the current info area (1). Fields added to a panel are displayed in bold.
- The **panels** and the fields added to the panels (2). Fields that field attributes have been defined for are colored orange.
- **Attributes:** The available attributes and the currently defined attributes are displayed here for the selected element. The available attributes depends on the type of object (panel, field). The available attributes for a field depends on the field type.


Editing the Layout and Field Attributes

Your administrator can determine that you can access CRM.designer to edit the fields displayed in an info area.

You can add further fields in the info area to the mask, for example, or edit field attributes.

If you are able to customize an info area, the  (**Adjust Layout & Fields**) button is displayed in the info area's tab view.

To edit a mask and field attributes:



1. Click on  (**Adjust Layout & Fields**). CRM.designer is opened and the control is displayed, see [CRM.designer User Interface](#).
2. The initial configuration (`*SelfAdmin`) is read-only. In order to edit the fields, you first need to copy the field group to the `*SelfAdminDev` configuration by clicking on **Copy to configuration**. This button is only displayed in read-only mode.
3. Customize the control. You can:


- **Add fields:** Click on the desired field in the list of fields and drag it to the desired panel.

You can enter a search term (field name or number) to restrict the fields displayed in the list. To remove a field, select it and press the Del key.

- **Add fields in related info areas:** Click on **Add linked Fields** beneath the list of fields to add a field in a related info area.

For more information, see [Add Linked Fields](#) in the *Aurea CRM web Administrator Guide*.

- **Add a new panel:** Click on **Add new Tab/Group**. Panels are indicated with the  icon. Click on  to remove a panel (or combined field).


- **Add combined fields:** Click on **Add new Combined Field**. Drag the fields you want to combine in the field to the combined field. Combined fields are indicated with the  icon. A combined field displays information from multiple fields in a single field in view mode.

Combined fields are displayed at the end of the list of fields (below the non-field elements). Combined fields can be assigned to panels in the same way as normal fields.

For more information, see [Defining Combined Fields](#) in the *Aurea CRM web Administrator Guide*.

- **Add special characters:** You can add elements used to structure the view (e.g. line feeds and separators) in the same way as fields. These elements (non-field elements) are displayed at the end of the list of fields.

For more information, see [Non-Field Elements](#) in the *Aurea CRM web Administrator Guide*.

4. Save your settings. Changes are saved to the `*SelfAdminDev` configuration and the changes are displayed immediately in Aurea CRM web.
5. To discard your changes, click on  (**Delete**) in the toolbar. The `*SelfAdminDev` configuration is reset to its original status.
6. To retain your changes, click on **Publish to Parent Configuration**. The changes are copied to the `*SelfAdmin` configuration. The changes are now available to all users after logging in again.

The **Publish to Parent Configuration** button is only active once you have saved you changes.

Defining Field Attributes

Learn to define field attributes.

You can define field attributes for each field, e.g. whether the field is read-only or is a mandatory field. The field attributes available for a field depends on the selected field's type.

To define field attributes:

1. Select the field in a panel. The available attributes are displayed here for the selected element on the right.
2. Define the desired attributes.

For more information on field attributes, see [Field Attributes](#) in the *Aurea CRM web Administrator Guide*.

Defining Attributes for Panels and Combined Fields

This topic explains to define attributes for panels and combined Fields.

You can enter a name (used in <designer) and define a label (displayed in the UI) for each panel and combined field.

To define attributes:

1. Click on the panel or combined field's header to select it.
2. You can edit the following under **Panel Editor**:
 - The label (the text displayed in the user interface)
 - The name of the element in CRM.designer
 - Whether the panel is displayed as a group or tab (by default, panels are displayed as tabs).

For more information on panels, see [Configuring Panels](#) in the *Aurea CRM web Administrator Guide*.

Editing Labels



You can define labels for fields and panels.

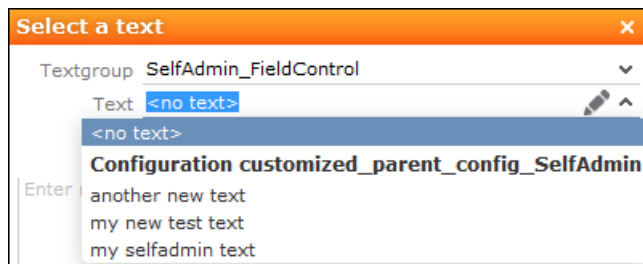
The label determines the text displayed in the UI. You can assign an existing text or add a new one. New texts are saved in their own text group in the text table.

For more information on texts, see [Texts](#) in the *Aurea CRM web Administrator Guide*.

Using an Existing Text as a Label

To assign an existing text to a label:

1. Click on  (**Edit Text**) to the right of the **Label** field.
2. Click on  in the **Select a text** dialog to select the desired text group and text.

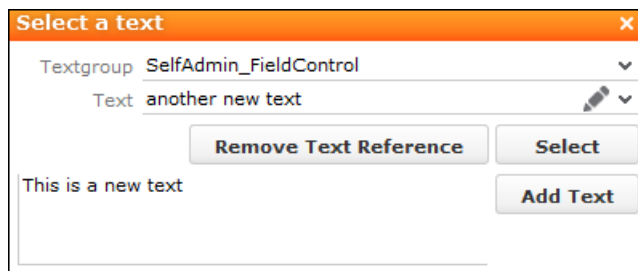


3. Click on **Select** to assign the text.
4. To remove the text, click on  (**Edit Text**) and then on **Remove Text Reference**.

Adding a New Label Text

To add a new text:

1. Click on  (**Edit Text**) to the right of the **Label** field.



2. Enter the new text in the text field at the bottom of the dialog and click on **Add Text**.

Texts are stored in text groups. If you have entered a new text and the `*SelfAdminDev.SelfAdmin_FieldControl` text group does not yet exist, you are asked whether you want to add the text group. All new texts that you add are also added to this text group.

3. Save your changes and click on **Publish to Parent Configuration**.

The texts are saved in the parent configuration's `SelfAdmin_FieldControl` text group and the `*SelfAdminDev.SelfAdmin_FieldControl` text group is deleted. The next time you enter new texts, you need to add the temporary text group again.

Changing the Order of Fields and Panels

Panels and fields within a panel are displayed by default in the order defined by your administrator.

You can change the order by dragging and dropping elements:

1. Select a panel or field. Ctrl+click to select multiple fields or panels.
2. Drag the elements to the desired position.
3. You can also drag fields from one panel to another using drag&drop.

Copying Fields from One Panel to Another

You can copy certain fields in a field group from one panel to another.

For example - if you have defined a combined field for these fields in view mode and want to copy them to the panel for editing.

To copy fields from one panel to another:

1. Click on the desired field. Ctrl+click to select multiple fields.
2. Hold down Ctrl and drag the selected fields to the desired panel.

Note: If you do not hold down Ctrl, the fields are only moved, not copied.

Keyboard Shortcuts

Your administrator can define additional shortcuts or reassign the following standard shortcuts.

The following default keyboard shortcuts are available in Aurea CRM web:

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 Related Data area.
Alt+<Number>	Displays the tab at the corresponding position, e.g. Alt+3 opens the third tab. Note: You first need to activate the Related Data 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. Note: 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. Note: 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 Related Data area.
Alt+<Number>	Displays the tab at the corresponding position, e.g. Alt+3 opens the third tab. Note: You first need to activate the Related Data 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.

3

Managing CRM

Manage CRM to provide custom configuration to meet and facilitate your internal processes.

Below topics provide information about managing various areas of CRM:

Offer Management – ISI

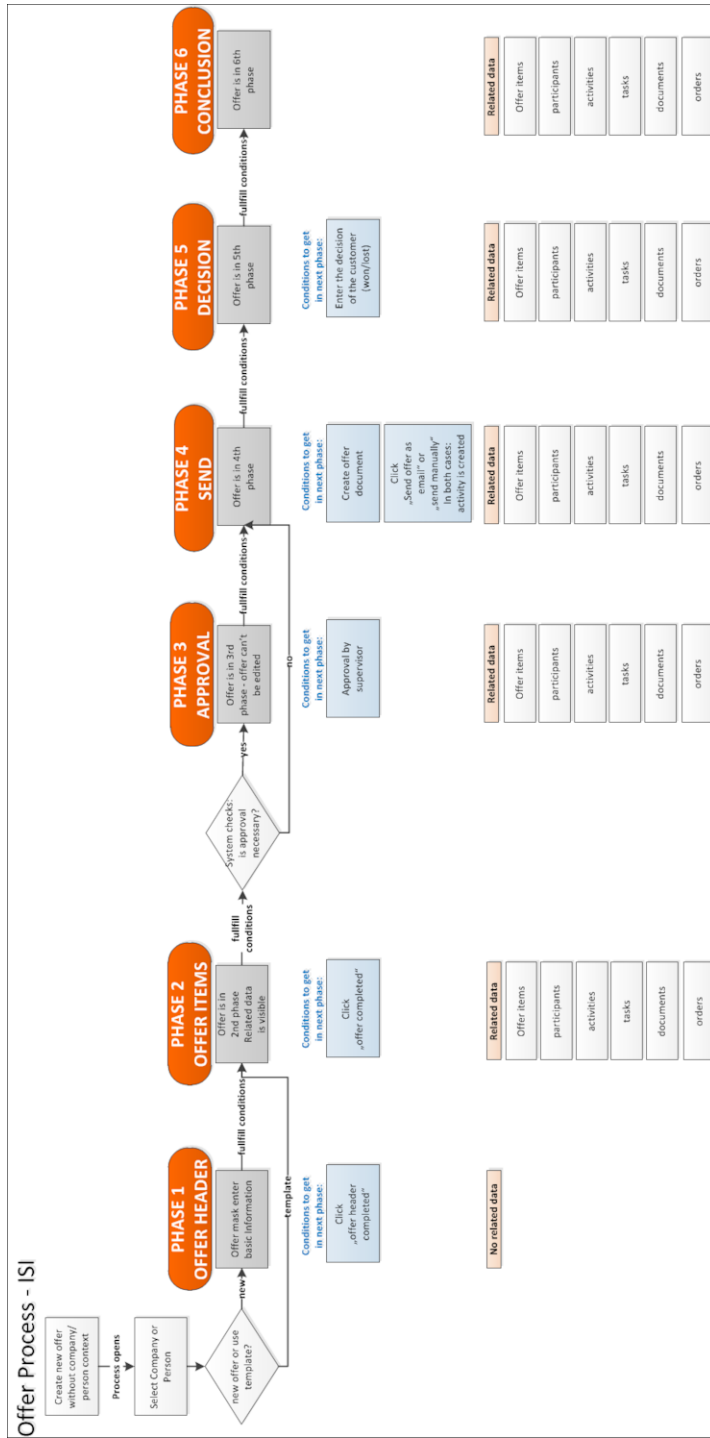
Aurea CRM supports you in adding and editing offers.

A process guides you through the necessary steps.

You can:

- Add offers, see [Starting the Offer Process](#) on page 225
- Add offer items, see [Adding Offer Items](#)
- Add documents, see [Adding Documents](#).
- Create different versions of an offer, see [Offer Versions](#) on page 234
- Copy offers to other companies/persons, see [Phase 6 - Conclusion](#) on page 233
- Convert offers to orders, see [Phase 5 - Decision](#) on page 231
- Send offers by e-mail, see [Phase 4 - Send](#) on page 230
- Store the customers decision, see [Phase 5 - Decision](#) on page 231
- Add participants, see [Participants and Roles](#) on page 89
- Add activities, see [Activities](#) on page 290
- Add tasks, see [Tasks](#) on page 299
- Approve offers (management), see [Approving Offers](#) on page 233
- Create offers from within an opportunity, see [Opportunity Process](#) on page 258
- Add offer templates, see [Phase 1 - Offer Header](#) on page 226
- Add orders, see [Phase 5 - Decision](#) on page 231

Note: For more details on the fields and calculations, see [Opportunity Fields and Calculations](#) on page 270.



Offer Process

The offer process supports you in adding and editing offers, and guides you through the necessary steps.

The arrows at the top of the page indicate the offer's current phase and whether the offer has been won or lost.

Offers (and orders) consist of a "header record" that contains data relating to the entire offer (e.g. offer number, currency etc.), and item records that contain data concerning the individual items in the offer (e.g. product, quantity thereof etc.). The total value of the offer is calculated automatically by totaling the value of items in the offer (discounts are taken into account).

You can add activities, documents, tasks and participants within the scope of the offer process and send the offer to the customer by e-mail or by other means.

You can create a new version of the offer at any time, or copy the offer (and all items) to another company or person.

If the customer decides to place an order based on an offer, the offer can be copied to an order.

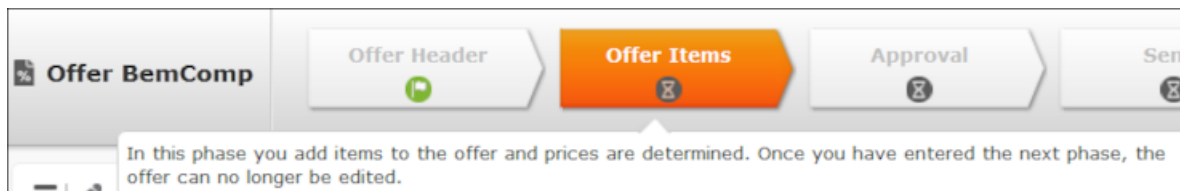
The offer process consists of the following phases and stages:

Phase	Stage (Catalog Field)	Phase Tasks	Next Phase
1) Offer Header	0 - Creation	Enter general information on the offer, such as the No. and Currency	Click on Offer Header completed to progress to phase 2
2) Offer Items	1 - Offer Items (In progress)	Add offer items	Click on Offer completed to progress to phase 3 or 4
3) Approval	2 - Waiting for Approval	If approval is required: Wait for the offer to be approved by your superior	If the offer is approved, the process proceeds to phase 4 If the offer is not approved, the process remains in phase 3. You may wish to create a new version of the offer (phase 2).

Phase	Stage (Catalog Field)	Phase Tasks	Next Phase
4) Send	3 - Waiting to be sent	Create an e-mail to send the offer or send the offer using other means (an activity is added) Create document (mandatory)	Click on Create E-mail or Send manually to progress to phase 5
5) Decision	4 - Waiting for Decision	Wait for the customer to come to a decision	Click on Decision to progress to phase 6
6) Conclusion	5 - Closed - Won 6 - Closed - Lost 7 - Closed - Versioning	The stage is set according to the customer's decision.	

In order to progress to the next phase, certain conditions need to be met (e.g. an offer document needs to exist of the offer needs to be approved), or you need to click on one of the buttons with the » icon.

Further information on a phase is displayed using icons in the phase arrows. Move your mouse cursor over the arrows or icons to display a tooltip.





You can exit the offer process at any time and continue at a later date. If you open an existing opportunity, it is opened at the current phase. If your superior approves an offer (phase 3 (**Approval**)), the offer is subsequently opened in phase 4 (**Send**).

Note: If you want to update the data entered for the current phase (e.g. after determining whether approval is required or adding offer items), click on the phase's arrow in the header. The view is refreshed.

Starting the Offer Process

If you add a new offer or open an existing offer, the offer process is started automatically or continued.

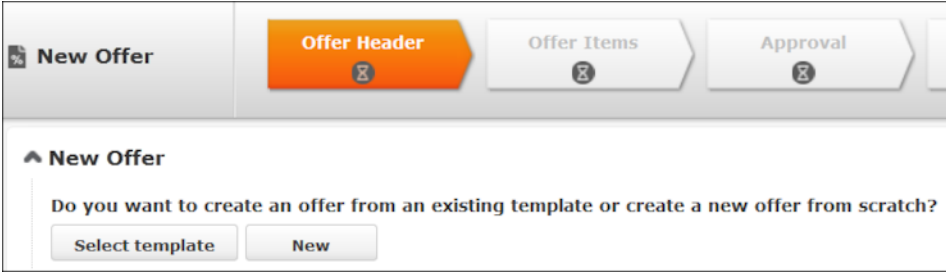
To **add an offer** and start the offer process:

- Select  (**Sales**) > **Offers**. Start the search and click on **+** (**New**). Select the company or person that you wish to add the offer for.
- Switch to the company or person that you wish to add the offer for. Click on the **Offers** node in the tree. Start the search. Click on **+** (**New**). If you added the offer for a person, they are automatically entered as the **Contact Person**.
- Switch to the property you wish to add an offer for. Click on the **Offers** node in the tree. Click on **+** (**New**). Search for and select the participant you wish to add an offer for.
- Switch to the property participant you wish to add an offer for ( (**Sales**) > **Properties** > **Property Participants** node). Switch to the **Offers** tab under **Related Data** and click on **+** (**New**).
- You can add an offer to an opportunity in phase 4 (**Offer**) of the opportunity process, see [Opportunity Process](#) on page 258.

Note: To open an **existing offer** in the tree view, click on the **Offers** node and select the offer in the list. Click on **Manage** in the list header or select **Start Offer Management** from the offer's context menu.

If you open an existing offer, it is opened at the current phase.

The offer process is started. You can now select a template of add a new offer.



The screenshot shows a process flow for creating a new offer. At the top, there are four steps: 'New Offer', 'Offer Header', 'Offer Items', and 'Approval'. The 'Offer Header' step is currently active and highlighted in orange. Below this flow, a dialog box titled 'New Offer' is displayed. It asks the user: 'Do you want to create an offer from an existing template or create a new offer from scratch?'. There are two buttons: 'Select template' and 'New'.

- Select **New** to add a new offer.
Phase 1 (**Offer Header**) is displayed. The **Stage** field is set to **0 - Creation**.
- Click on **Select template**. Start the search and double-click on the desired template in the results list.
Choose whether to activate or deactivate **automatic pricing**.

The offer process is opened in phase 2 (**Offer Items**). The **Stage** field is set to **1 - Offer Items (In progress)**.

Phase 1 - Offer Header

General information phase.

In this phase, you enter general information concerning the offer:

- The **Date**, **Sales Rep**, **Customer Group Price List** and **Currency** are mandatory fields.
- The offer number (**No.**) is generated automatically when saving the record.
- Enter data such as the **Contact Person**, **Type** of offer (e.g. main offer) etc.

If you added the offer for a person, the person is automatically entered in the **Contact Person** field.

- You can display and enter additional information in the various tabs. For example, the **Approval** tab contains information on whether the offer needs to be approved by your superior.
- Enable the **Template** check box to define that the offer is a template and can be used as a template when adding new offers, >> [Starting the Offer Process](#) on page 225.
- Save the record.

Once you have entered all the necessary data, click on **Offer Header completed** in the header. The process proceeds to phase 2 (**Offer Items**). The **Stage** field is set to **1 - Offer Items (In progress)**.

Phase 2 - Offer Items

Adding items to offer.

The screenshot shows the 'Offer Items' phase of the software. The top navigation bar includes buttons for 'Offer Header', 'Offer Items' (active), 'Approval', 'Send', 'Decision', and 'Conclusion'. The main content area displays offer details: No. 10001-2130001171-1, Date 09.10.2013, Valid to 08.12.2013, Type Main Offer, Status Open, Stage 1 - Offer Items (In progress), and Contact Person Simon Seller Test. Pricing details include Customer Group Price Standard, Currency EUR, Net Total 80.000,00, Discount 0,00%, Purchase Price 64.000,00, Margin 16.000,00, and Margin (%) 20,00%. A table at the bottom lists offer items:

Item	Item No.	Item name	Product Group	Product	Quantity	Selling Price	Item Value	Item Disc...
1	A001	A001	Automatic Lathe	Single spindle bar ...	8,00	10.000,00	80.000,00	

In this phase, you add items to the offer. You can also add participants, activities, documents and tasks.

Once you have entered all the necessary data, click on **Offer completed** in the header. If the offer requires approval, the offer proceeds to phase 3 (**Approval**). The **Stage** field is set to **2 - Waiting for Approval**. If no approval is required, the offer proceeds to phase 4 (**Send**) and the **Stage** field is set to **3 - Waiting to be sent**.

Note: From phase 2 onwards, you can copy the offer and its offer items to another company or person (**Copy Offer to** button). When copying the offer, you can choose whether to activate or deactivate automatic pricing. If the offer is linked to an opportunity or a property, the participants added to the opportunity/property are available for selection. The new offer is opened in phase 2 (**Offer Items**).

Note: In the copy/paste process, the **Sales Qty. Unit** field and any other workflows using the process are cleared.

Adding Offer Items

The products and services being offered are added to the offer as offer items. The total value of the offer items (**Total value** field) is calculated by multiplying the quantity by sales price and applying any valid discounts. The value of the offer is calculated automatically based on the value of the items added to the offer. Discounts can be entered for individual items as well as for the entire offer.

If the offer was not added using a template containing offer items, no items is present initially.

You can add items using the quick add or single add functions. For further details, see [Quick Add](#) on page 165.

Note: Your administrator can determine that the item structure is displayed in the quick add area. For further details, see [Item Structure in the Quick Add Area](#).

To add a single offer item:

1. Click on **+** (**New**) on the **Offer Items** tab. The input mask is displayed.

The screenshot shows the 'Offer Item E003' form. It is divided into three main sections: 'Overview', 'Price', and a bottom section with 'Comment' and 'Stock management' tabs. The 'Overview' section contains fields for 'Item 2', 'Item No. E003', 'Product Group Finishing', 'Product Interior Plaster', 'Quantity 1,00', 'Quantity Unit 100,00', 'Item name E003', 'Description Lime Plaster E003', 'Sales Rep Simon Seller Test', and 'Type Item'. The 'Price' section contains fields for 'Purchase Price 3.500,00', 'Selling Price 6.000,00', 'VAT 0,00%', 'Offer Discount (%) 0,00%', 'Item Discount (%) 0,00%', and 'Discount limit 10,00%'. The bottom section has a 'Comment' tab selected, showing a 'Text' field.

2. Enter the **Item No.** The **Item name**, **Product** and **Product Group** fields are filled in automatically.
 3. Enter additional data such as the **Quantity**, **Selling Price** and discounts.
 4. Save the record. The offer item record is added and you are returned to the offer process.
-

Note: If you have defined price lists, the **Purchase Price**, **Selling Price** etc. are entered automatically when **saving** the record. You can manually edit the **Selling Price**.

If approval is required for an offer item, a red bar is displayed in the list of items.

Approval Requirements

Approval is required by your superior in the following cases:

- The discount entered in the **Discount (%)** field is higher than the maximum discount you are allowed to grant.
- The total value of the offer (**Net Total**) is higher than the total value that you are allowed to create offers for.
- The discount at the item level (**Item Discount (%)** field) is higher than the discount threshold defined for the item in the item master.
- At least one of the offer item contains a product that requires approval.

Note: Your administrator is responsible for defining the discount limits and the maximum permitted total offer value. These limits are defined in the **Rep** info area (**Discount limit** and **Offer sum Approval Threshold** fields). The **Discount limit** and **Item requires offer approval** fields in the **Item Master** info area determine the maximum discount permitted for an item and whether the item requires approval.

The **Approval** tab in the offer process provides you with information on whether approval is required for the offer and why. The **Approval** field can contain the following values: **Not required**, **Required**, **Approved**, **Declined**.

Comment	Approval	Ext. System	Stock	Linked Elements
Approval Required			Total discount t...	<input type="checkbox"/> Do not determi...
Approved			Item discount t...	<input type="checkbox"/>
Declined			Sum too high	<input type="checkbox"/>
Superior <u>Ben Boss</u>			Item needs ap...	<input checked="" type="checkbox"/>

Parent Data Related Data								
Offer Items	Participants	Activities	Tasks	Documents	Orders	History		
<< < 1 - 2 of 2 > >> Quick Add New Browse								
Item	Item No.	Item N...	Product...	Product	Quantity	Selling ...	Item Va...	Item Di...
2	A003	A003	Machining	CNC Milling	22,00	13.500,00	297.000,00	
1	E003	E003	Finishings	Interior Plas...	1,00	6.000,00	6.000,00	

If approval is required for an offer item, a red bar is displayed in the list and the **Net Total** field is displayed in orange.

Note: The **Approval** field is **not** updated automatically. Click on phase 2's arrow in the header to update the field.

If the offer requires approval, the offer proceeds to phase 3 (**Approval**). The **Stage** field is set to **2 - Waiting for Approval**. If no approval is required, the offer proceeds to phase 4 (**Send**) and the **Stage** field is set to **3 - Waiting to be sent**.

Phase 3 - Approval

In this phase the offer is available for approval, if required.

Offer Header	Offer Items	Approval	Send	Decision	Conclusion
Offer BemComp		2			

Overview	Price
No. 10001-2130000216-1 Date 04.03.2013 Valid to 03.05.2013 Reminder Date	Type: Main Offer Status: Open Stage: 2 - Waiting for Approval Template: <input checked="" type="checkbox"/>
Customer Group Price: Standard Currency: EUR Payment Conditions Net Total: 57.560,00	Discount: 0,00% Reason for Discount: Total value 57.560,00 VAT abs. Total value incl. VAT: 57.560,00
	Contact Person: Simon Seller Test Sales Rep: Simon Seller Test Language: German Purchase Price: 124.300,00 Margin: 0,00 Margin (%): 0,00%

Linked Elements	Comment	Approval	Ext. System	Stock
Approval Required				Total discount too high <input type="checkbox"/>
Approved				Item discount too high <input type="checkbox"/>
Declined				Sum total too high <input checked="" type="checkbox"/>
Superior <u>Ben BossTest</u>				Item needs approval <input checked="" type="checkbox"/>

In this phase, you can no longer edit the offer header and cannot edit or add offer items.

In phase 2 (**Offer Items**) the system checked whether the offer requires approval from your superior, see [Approval Requirements](#).

Once your superior has **approved** the offer, the offer automatically progresses to phase 4 (**Send**). The **Stage** field is set to **3 - Waiting to be sent**.

If your superior **declines** the offer, the offer remains in phase 3 (**Approval**). The **Approval** field on the **Approval** tab is set to **Declined**. You can no longer edit the offer. You can however create a **new version** of the offer, >> [Offer Versions](#) on page 234.

Note: You cannot send an offer whose approval status is **Required** to a customer.

Phase 4 - Send

In this phase, you can no longer edit the offer header and cannot edit or add offer items.

In order to progress to phase 5, you need to add an offer document, see [Adding Documents](#).

You can either send the offer by e-mail (**Create E-mail**) or using other means (**Send manually**), e.g. as a letter. In either of these cases, the process proceeds to phase 5 (**Decision**). The **Stage** field is set to **4 - Waiting for Decision**.

If you select **Create E-mail**, you can select a template for the e-mail. You can edit the e-mail. Click on **Send E-mail** to send it. An e-mail activity is automatically added and can be accessed from the **Activities** tab. Click on **Back to Overview** to return to the process (phase 5) without sending the e-mail and only add the activity.

If you select **Send manually**, a letter activity is added. Click on **Back to Overview** to return to the process (phase 5).

Note: If you select **Create E-mail** and no contact person is entered, you are prompted to select a person. Only contact persons at the company the offer was added for can be selected. You can also add a new contact person.

If you have not created a document and click on **Create E-mail** or **Send manually**, you are asked whether you want to create a document. If you do not create a document, the offer remains in this phase.

Adding Documents

In order to progress to phases 5 (**Decision**), at least one document needs to be added to the offer.

To create an offer document:

1. Click on **Create Document (PDF)**.
2. Select the desired letter template and click on **Load**.
3. The document is opened in Microsoft Word and you can edit it as required.
4. Close the document.
5. A PDF file is generated and can be accessed from the **Documents** tab.

You can also add documents directly from the **Documents** tab, see [Documents](#) on page 312. All documents added here are sent as attachments if you send an e-mail.

Note: The PDF is the document containing the offer that you need to send to your customer. You can no longer add or edit offer items in phase 4 (**Send**). If you want to make changes at this point, you need to create a new version of the offer, see [Offer Versions](#) on page 234.

Phase 5 - Decision

In this phase, check the offer selected by customer and take decision accordingly.

The screenshot displays the 'Decision' phase of an offer management system. At the top, a progress bar shows the following steps: Offer Header, Offer Items, Approval, Send, **Decision** (highlighted in orange), and Conclusion. To the right of the progress bar, the offer's validity and value are shown: Valid To: 08.12.2013, Sales Rep: Simon Seller, Value: 6.000,00 EUR.

The main content area is divided into several sections:

- Overview:** Displays offer details including No. 10001-2130001171-1, Date 09.10.2013, Valid to 08.12.2013, and Stage 4 - Waiting for Decision.
- Price:** Shows financial details such as Purchase Price 3.500,00, Margin 2.500,00, and Margin (%) 42,00%.
- Linked Elements:** Includes tabs for Comment, Approval, Ext. System, and Stock.
- Parent Data | Related Data:** A table listing offer items with columns for Title, K, C, Link, FI, FI_SerNo, PE_StaNo, P..., Company, Person, Link..., Link_St..., and LI....

Title	K	C	Link	FI	FI_SerNo	PE_StaNo	P...	Company	Person	Link...	Link_St...	LI...
Offer...	SK...	09.09.10001-2130001171-1		10001	2610			BemComp	PR	10001	21300...	

In this phase, you can no longer edit the offer header and cannot edit or add offer items.

Click on **Create E-mail** to send a new e-mail relating to the offer, or switch to the **Activities** tab to edit and send e-mails that have not yet been sent.

Once you have received a decision from the customer, you can enter it:

1. Click the **Decision** button.
2. You can select which decision the customer has made and how you wish to proceed:
 - **Offer has been rejected - create new version**, see [Offer Versions](#) on page 234.

A new version of the offer is created and opened in phase 2 (**Offer Items**). The original offer proceeds to phase 6 (**Conclusion**) and the **Stage** is set to **7 - Closed - Versioning** and the **Status** is set to **Lost**.

- **Offer has been rejected - lost**

You are asked why the offer was lost and against which competitor.

The offer proceeds to phase 6 (**Conclusion**) and the **Stage** is set to **6 - Closed - Lost**.

- **Offer has been won - convert to order**

An order is added. You can access the order from the **Orders** tab.

The offer proceeds to phase 6 (**Conclusion**), the **Stage** is set to **5 - Closed - Won** and the **Status** is set to **Order**

Note: You can also select **Copy to Order** from the offer's context menu to create an order from the offer.

You can only generate an order from an offer once; if an offer has already been copied to an order, you cannot copy it to another order.

- **Offer has been won - no further actions**

The offer proceeds to phase 6 (**Conclusion**) and the **Stage** is set to **5 - Closed - Won**.

Note: You can select **Copy to Order** from the offer's context menu in the company and person tree views (**Offers** node) to subsequently copy the offer to an order. The order is always added for a company, i.e. for the person's company when adding the order for a person.

Phase 6 - Conclusion

Conclusion of an offer.

Item	Item No.	Item name	Product Group	Product	Quantity	Selling Price	Item Value	Item Disc...
2	E003	E003	Finishings	Interior Plaster	1,00	6.000,00	6.000,00	

In this phase, you can no longer edit the offer header and cannot edit or add offer items.

You can copy the offer to another person or company (**Copy Offer to** button) or create a new version (**Create new version**), see [Offer Versions](#) on page 234.

Note: You can also select **Copy Offer to** from the offer's context menu to create an order from the offer.

Approving Offers

Learn how to approve and offer.

No.	Sales Rep	Disc...	Company	To...	Currency
10001-2130000216...	Simon Seller...	30,00%	BemComp	57.56...	EUR
10001-2130000173...	Simon Seller...	30,00%	V8 Show Company	40.00...	EUR
10001-2130000157...	Simon Seller...	30,00%	Abraham Computers test	30.00...	EUR

Offers awaiting approval are displayed under **Offer Approval** on your start page (management dashboard). You can open offers, but you cannot edit the offer or offer items.

Select (**Approve**) or (**Decline**) to approve or reject an offer.

Offer Versions

Learn to create offer version.

From phase 3 (**Approval**) of the offer process onwards, you can no longer edit the offer header and cannot edit or add offer items. If you want to make any changes to the offer, you need to create a new version of the offer.

Click on **Create new version** in phases 2-6 to create a new version or click on **Offer Versions** (click on the small downwards arrow next to **Create new version** to access this option) to display an overview of the different versions of the offer that have been created.

A new version is automatically created if you select **Offer has been rejected - create new version** in phase 5 (**Decision**).

The new version of the offer is opened in phase 2 (**Offer Items**). The original offer proceeds to phase 6 (**Conclusion**) and the **Stage** is set to **7 - Closed - Versioning** and the **Status** is set to **Lost**.

The new version of the offer is assigned a new offer number, which is composed of the original offer's number and a consecutively numbered suffix.

The offer items are copied to the new offer.

Pricing

The sales price for an item in an offer is determined automatically.

You need to have entered an **Item** and **Quantity** in the **Offer Item** info area, and specified a **Currency** in the **Offer** info area first.

When pricing items, price lists and bulk volumes are taken into account.

Note: **Prices** are only calculated for items in **offers**. If you wish to use Aurea CRM's pricing features for **orders**, you need to first add an offer and copy the offer to an order, see [Order Management](#) on page 234.

For further information please contact your administrator.

Order Management

Learn to manage orders.

Orders are always added from offers. You cannot add orders directly, add items to existing orders or edit items added to an order. **Automatic pricing** is not applied to orders.

To create an order, you first need to add an offer and select **Copy to Order** from the offer's context menu. You can also create orders within the scope of the offer process, see [Phase 5 - Decision](#) on page 231.

The order is always added for a company, i.e. for the person's company when adding the order for a person.

Key Account Management


The key account management functions in Aurea CRM web provide you with an overview of all information relating to your key accounts.

A company is classified as one of your key accounts if:

- The **Key Account** check box in the company record is enabled.
- You are entered as the rep in the company record or are a member of the sales group assigned to the company.

You can edit data relating to your key accounts in the following areas:

Key Account Management Dashboard

Select  (**Sales**) > **Key Account Management Dashboard** to open the key account management dashboard. The key account management dashboard can also be configured as your start page.

The screenshot displays the Update CRM interface with the following components:

- Calendar:** Shows a calendar for September 2014, currently on Tuesday, September 9th. It includes a time slot view from 08:00 to 15:00.
- Opportunities (Company Hierarchy):** A bubble chart showing Investment Prob. (%) on the y-axis (0-100) and Probability (%) on the x-axis (0-100). It features four bubbles of varying sizes and colors (purple, teal, blue, green).
- Activities Involving My Key Accounts:** A table with columns for Company, Person, Type, Subject, Rep, Sta., Sta., End., End., Sta. A single activity is listed for 'Bosnal Sc'.
- Tasks Involving My Key Accounts:** A message indicating 'The query returned no results.'
- Open Offers Involving My Key Accounts:** A table with columns for Stage, Com., No., Date, Offer..., Net T..., Sale..., Appr..., Disc..., Disc... It lists several offers with their respective values and statuses.
- Tickets Involving My Key Accounts:** A message indicating 'The query returned no results.'
- Key Account Suggestions:** A table with columns for Company, Street, Posta..., City, Country, A Sector. It lists 'Bleck Sekt AG'.
- Costs vs Revenues:** A bar and line chart showing Sum (Costs) and Sum (Order Value) for various categories. The y-axis ranges from 0 to 180K. A legend indicates 'Sum Costs' (line) and 'Sum Order Value' (bar).
- Key Account Comparison:** A 3D bar chart showing Sum (Total product value), Sum (Offer value), and Sum (Order Value) for various companies. The y-axis ranges from 0 to 18M.

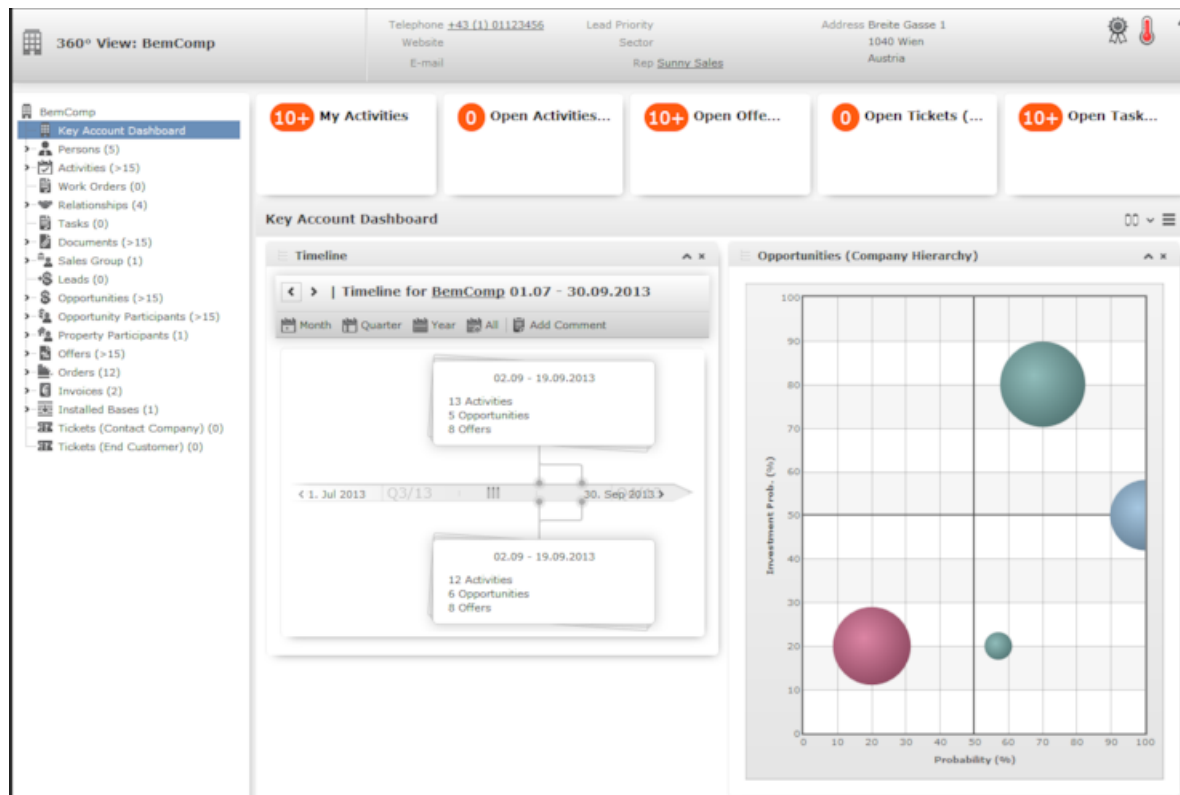
The following information is displayed:

- Your calendar, >> [Calendar](#) on page 284
- Activities with your key accounts in the previous two and next two weeks
- Tasks relating to your key accounts, >> [Tasks](#) on page 299
- Open offers for your key accounts, >> [Offer Management – ISI](#) on page 221
- Open tickets for your key accounts, >> [Ticket Process](#)
- Key account suggestions: companies whose total order value the previous year exceeded EUR 250,000 and that are not yet key accounts

- Opportunity matrix for your key accounts, >> [Opportunity Matrix](#)
- **Costs vs Revenues:** A comparison of activity expenses vs revenue
- **Key Account Comparison:** Breakdown on the performance of various key accounts

Key Account Information on a Company

Click on the **Key Account Dashboard** in the company tree to display information on a specific company in the key account dashboard.



The following information is displayed:

- Your activities involving this company
- Activities involving this company over the previous and next two weeks, and where you are not a participant
- Offers whose status is not "Closed", see [Offer Management – ISI](#) on page 221
- Open tickets, see [Ticket Process](#)
- Open tasks, see [Tasks](#) on page 299
- A timeline displaying all activities, opportunities, offers and tickets added for the company
- The opportunity matrix.

The information displayed here includes data added for other companies in the same corporate hierarchy, i.e. those companies linked to the current company via a relationship of the type "Corporate".

Sales Territory Management – ISI

You can assign sales reps and account managers to **sales territories** in Aurea CRM.

If you add a new company, person or property, the territory is determined based on the address (**Country** and **Postal Code** fields) and the corresponding rep assigned to the territory is assigned to the new company/person/property.

You can generate sales groups and property manager records **automatically** (see [Sales Territory Management Info Area](#) on page 238, [Applying the Sales Territory Management Settings](#) on page 239, [Automatically Generated Records](#) on page 239)



To generate sales groups and property manager records **manually** (see [Adding Sales Groups](#) on page 240, [Adding Property Managers](#) on page 240).

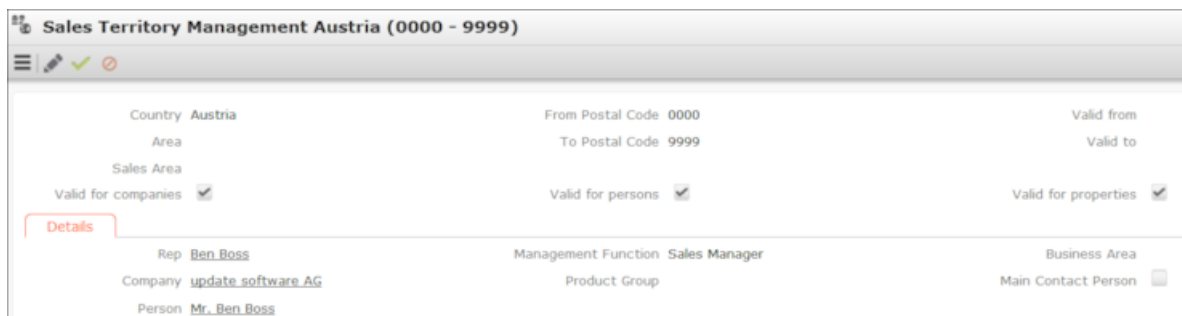
Sales Territory Management Info Area

Use the Sales Territory Management info area to enter the reps responsible for a territory and to determine their function.

Reps can automatically be assigned to companies, persons and properties that meet the defined criteria. You can add any number of records for each criteria and with multiple reps assigned the same management function.

To add a sales territory management record:

1. Select  (**Sales**) > **Sales Territory Management**.
2. Start the search.
3. Click on  (**New**).



Sales Territory Management Austria (0000 - 9999)		
Country	Austria	From Postal Code 0000
Area		To Postal Code 9999
Sales Area		Valid from
Valid for companies <input checked="" type="checkbox"/>	Valid for persons <input checked="" type="checkbox"/>	Valid to
Details		
Rep	Ben Boss	Management Function Sales Manager
Company	update software AG	Business Area
Person	Mr. Ben Boss	Product Group
		Main Contact Person <input type="checkbox"/>

4. Enter the **Country**.
5. Enter additional criteria such as the range of postal codes (**From Postal Code** and **To Postal Code** fields), **Sales Area**, and the time period the record applies for (**Valid from** and **Valid to** fields).

All criteria need to match for reps to be assigned to a company/person. Postal code ranges may overlap.

-
6. Enable the **Valid for companies/person/properties** options to determine which info areas the settings are applied to.
 7. Select the **Rep, Company** or **Person** responsible for the territory. This can be an internal rep or group, or an external company or person.
 8. If you enter a **Business Area** an/or a **Product Group**, this information is transferred to the sales group or property manager record created based on the sales territory management record.

Applying the Sales Territory Management Settings

Once you have defined your sales territory management settings, you can automatically apply them.

Note: Sales groups added or edited manually (where the **Generated** field is disabled) are not updated.

To apply the settings, select  (**Sales**) > **Calculate Territory Allocation**.

The sales territory management settings are applied. Sales groups and property manager records are added or updated. These records can subsequently be edited.

Automatically Generated Records

Learn to automatically generate records.

When adding or editing company/person/property records (e.g. changing the postal code), sales groups and property manager records are automatically added or updated based on the sales territory management records.

The **Management Function, Rep, Company, Person, Business Area, Product Group** and **Main Contact Person** fields are transferred to sales group or property manager records.

The **Generated** field is enabled in sales group and property manager records that have been added automatically. If the record is edited manually, the **Generated** field is disabled.

Note: When applying updated territory management settings, only sales group and property manager records where the **Generated** field is enabled are updated. Records added or edited manually are left unchanged.

Adding Sales Groups

Sales groups allow you to organize your sales and support activities into various areas with different reps.

Sales groups can be defined automatically based on your territory management settings, or manually for companies or persons.

Note: Sales groups that have been generated automatically are indicated as such using the **Generated** field. When applying updated territory management settings, only sales groups where the **Generated** field is enabled are updated. Sales groups added or edited manually are left unchanged.

To add a sales group:

1. Switch to the desired company or person record.
2. Switch to the **Sales Group** node and click on **+ (New)**.

3. Enter data such as the **Rep**, **Business Area** etc.
4. Save the record.

Adding Property Managers

Use the **Property Manager** info area to store reps involved with properties in a variety of functions.

To add a property manager record:

1. Switch to the desired property, see [Property Management – ISI](#) on page 245.
2. Switch to the **Property Manager** node and click on **+ (New)**.

3. Enter data such as the **Rep, Business Area, Management Function** etc.
4. Save the record.

Note: Adding and updating property managers based on the defined settings functions in the same way as adding and updating sales groups, see [Sales Territory Management Info Area](#) on page 238 and [Adding Sales Groups](#) on page 240.

Inventory Management

You can manage your inventory in Aurea CRM.

For example, service technicians can manage the stocks in their vehicle.

Inventory management supports the following functions:

- Every rep can add various **stocks** for each item, see [Stock](#) on page 241.
- Various types of transactions can be entered, e.g. items removed from the central warehouse, returns, losses etc., see [Stock Control](#) on page 243.
- You can determine whether **stocks are affected** by offers and orders, see [Orders and Stocks](#) on page 244.
- A rep's current **stock** is calculated automatically based on stock control and stock control item records. This provides you with information on the quantity of a particular item in stocks, see [Stock](#) on page 241.
- All changes to stocks are logged in the **Stock History** info area, see [Stock History](#).

Note: This chapter describes the info areas and functions involved without dictating a fixed approach to inventory management.

In order to use the inventory management functions, your administrator needs to activate the automatic stock calculations.

For further information please contact your administrator.

Stock

Use the **Stock** info area to manage various stocks for each rep and item.



When a rep removes goods from storage, their personal stock increases; when a rep distributes goods, their personal stock is decreased. This allows reps to sell items or hand out samples from their personal stock.

If a stock-relevant stock control item or order item is added, Aurea CRM automatically adds a record for the corresponding rep, stock and item in the **Stock** info area. Whenever changes are made, the system automatically calculates the quantity of items available and in which stock. Changes are logged in the stock history, see [Stock History](#).

Items can also be flagged as not affecting stocks (the **No effect on stock** field is enabled in the item master), in which case the rep's stock remains unchanged, see [Item Master](#).

Stocks are counted in units (**Quantity** field). Quantities entered in stock control item and order item records are added/subtracted in units.

To manually add a stock:

1. Select  (**Service**) > **Stock**.
2. Start the search.
3. Click on  (**New**).

4. Enter data such as the **Rep**, **Stock**, **Item No.** etc.
5. Save the record.

Stock History

The **Stock History** info area stores stock transactions. The history displays the amount of items a rep has removed from storage, how many items the rep has sold or returned etc.

The **Stock History** tab is displayed in the **Stock** info area under **Related Data**.

Created on	Quantity Change	Link	Quantity prior to change	Quantity after change
06.10.2010	10	A001	240	250
06.10.2010	-5	A001	250	245

The **Stock History** info area is a child of the **Stock** info area. Each time the **Quantity** field in a stock record is changed, a history record is added containing the change in quantity and a link to the record that triggered the change.

The following changes are recorded:

- Changes resulting from new or edited order items (added when creating an order from an offer) and stock control items
- If quantities were changes as the result of deleting a stock control item record, the **Deleted** check box is enabled in the history record.

Stock Control

The **Stock Control** info area allows you to enter goods removed or returned to storage for each rep (warehouse management).

The individual items removed or returned are stored in stock control item records.

Stock Control Simon Seller Test1000100010

Rep: Simon Seller Test | Stock: Motor vehicle
 Stock Receipt Type: Add to vehicle stocks | Quantity factor: + Qty
 Date: 05.10.2011

Details



No. Items: 2 | Number of inventory-effective items: 2
 Created on: 06.10.2010 | Updated on: 09.10.2013

Related Data

Stock Control Items

Item No.	Item name	Product Group	Product	Quantity
E001	E001	Turn-Grind Centers	Vertical Turn-Grind Center	500
C007	C007	Storefront	Waterproofing and Special produ...	8

To add a stock control record for a rep:

1. Select  (**Service**) > **Stock Control**.
2. Start the search.
3. Click on  (**New**).
4. Select the **Rep** you want to enter the record for. By default, you are automatically entered.
5. Select the **Stock** that the record applies to, e.g. stationary, car tires etc.
6. Select the type of transaction in the **Type of stock control** field, e.g. withdrawal, return, defective, loss etc.
7. Choose the desired quantity factor in the **Quantity factor** field. The quantity factor determines how the stock control items affect stocks, i.e. whether stocks are increased or decreased, and whether quantities are specified in individual units (+ Qty, - Qty) or packaging units (+ Pack.Unit, - Pack.Unit).
8. Save the record.

Note: Aurea CRM automatically adds a stock record to the **Stock** info area based on the data you entered (stock control and stock control items) for each rep, stock

and item. If changes are made to the records, the stocks are updated automatically and the changes are stored in the stock history.

Stock Control Item

If you remove items from the stock or return them, you need to add a stock control item to the stock control record.

To add a stock control item record:

1. Switch to the desired record in the **Stock Control** info area.
2. Click on **+** (**New**) on the **Stock Control Items** tab.

Stock Control Item C007: 8

Item No. C007
Quantity 8
Packaging Unit 1

Item name C007
Inventory quantity 8
No effect on stock

Details

Business Area
Product Waterproofing and Special products
Created on 09.10.2013

Product Group Storefront
Inventory No.
Updated on

Parent Data
Stock Control_Simon_Seller_Test1000100010

3. Enter the **Item No.** or click on **Q** (**Select**) to select an item. The **Product** and **Product Group** fields are filled in automatically.
4. Enter the item's quantity in the **Quantity** field to determine the amount to be added or removed from the stock.
5. Enter the packaging unit in the **Packaging Unit** field.

If either "+Pack.Unit" or "-Pack.Unit" is entered as the quantity factor in the parent stock control record, the stock-effective quantity (**Inventory quantity**) is calculated based on the packaging unit.

6. Save the record.

Aurea CRM automatically adds a stock record to the **Stock** info area for this item (if not already present) and calculates the current items in stock (or updates the existing record accordingly).

Orders and Stocks

If your administrator has activated the inventory management process, data entered in orders also affects stocks.

Stock-relevant information entered in orders and order item records is applied to stocks. Aurea CRM automatically calculates changes to quantities per rep, stock and item, see [Stock](#) on page 241.

Orders are always added from offers, see [Order Management](#) on page 234.

Note: Offers do **not** affect stocks. However, you can enter stock-relevant data in offers and offer items (e.g. **Stock**, **Receipt Type**, **Quantity factor** etc.). This information is then transferred to the order and order items when creating an order from an offer, and is consequently taken into account when calculating stocks and recording the history.

You can enter information relating to stocks in an offer, e.g.:

- **Sales Rep:** The sales rep whose stocks are affected by the order
- **Stock:** The stock affected by the order
- **Receipt Type:** For example "Order"

Property Management – ISI

Aurea CRM's property management functions allow you to depict and manage complex construction projects.


You can:

- Store all data related to a property, such as activities and participants in a tree view.
- Centrally manage projects relating to a property from the call for tenders to the completion of the project.
- Enter information such as the name, type, address, responsibilities and the current status of the project.
- Depict multi-tiered sales channels including intermediaries.
- Display all activities relating to a property at once.
- Display the history of all visits, telephone calls and e-mails.
- Display the relationships between all participants at a glance, allowing you to identify decision-making structures.
- Manage sales opportunities relating to properties directly in Aurea CRM. Add and manage offers relating to the property until the sales opportunity has been concluded.
- Evaluate properties according to various criteria by answering questions, >> [Evaluating Properties](#) on page 246.

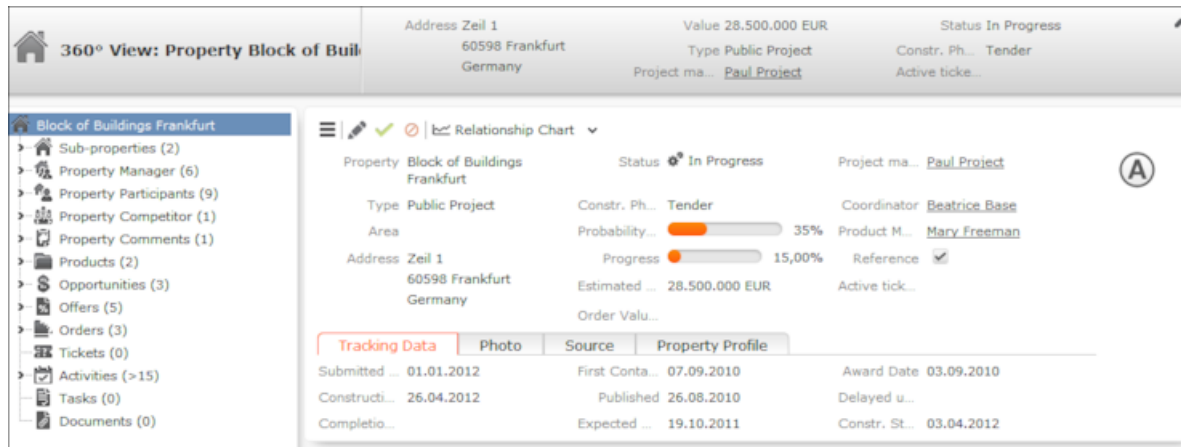
Adding Properties

Properties are independent records; they are not added for a specific company.

To add a new property:

1. Select  (**Sales**) > **New Property**.
2. Enter details such as the name, address, construction phase, reps, order value and important dates and save.

Depending on your sales territory management settings (>> [Sales Territory Management – ISI](#) on page 238), reps may be automatically assigned to the property as property managers once you enter a **Country** and **Postal Code**.



Tracking Data	Photo	Source	Property Profile
Submitted ...	01.01.2012	First Conta...	07.09.2010
Constructi...	26.04.2012	Published	26.08.2010
Completo...		Expected ...	19.10.2011
		Award Date	03.09.2010
		Delayed u...	
		Constr. St...	03.04.2012

3. Enter additional details in the appropriate fields. The entries available in the **Status** field allow you to divide the project into various phases, from submitting tenders to closing the project.

Note: The **Active tickets** field displays the number of open tickets relating to the property, >> [Customer Service](#).

Note: If you enter the address, you can display the location of the property on the **Map** tab, >> [Map View](#).

4. Save the record.
5. You can enter additional information concerning the property in the child info areas, >> [Additional Information on Properties](#) on page 249.

Evaluating Properties

Properties are evaluated using portfolios that contain questions and criteria used to classify the property.

To evaluate a property:

1. Click on **+** (**New**) on the **Portfolio** tab.
2. Select the portfolio template containing the desired questions.

3. Answer the questions relating to the property.

The screenshot displays a software interface for property management. At the top left, a 'Sectors' chart is shown as a 2x2 grid. The vertical axis is labeled 'Qualitative' (0 to 100) and the horizontal axis is 'Quantitative' (0 to 100). The quadrants are labeled C (top-left, yellow), A (top-right, dark green), D (bottom-left, light yellow), and B (bottom-right, light green). A white circle is positioned in the top-right quadrant (Sector A). A legend below the chart identifies the colors: Sector D (yellow), Sector B (light green), Sector C (yellow), and Sector A (dark green). To the right, a 'Result' box states 'The result is sector A'. Below the chart are navigation buttons: 'Display all questions', 'Show mandatory questions only', and 'Summary'. A 'Save' button with a green checkmark is in the top right. A tabbed interface shows 'Qualitative' as the active tab. Below the tabs, two questions are listed with radio button options:

Qualitative

Is the opportunity suitable as a reference?

- Yes
- Somewhat
- No
- No response

What level of internal investment is required?

- High
- Average
- Low
- No response

4. The answers are evaluated and the result is displayed graphically.

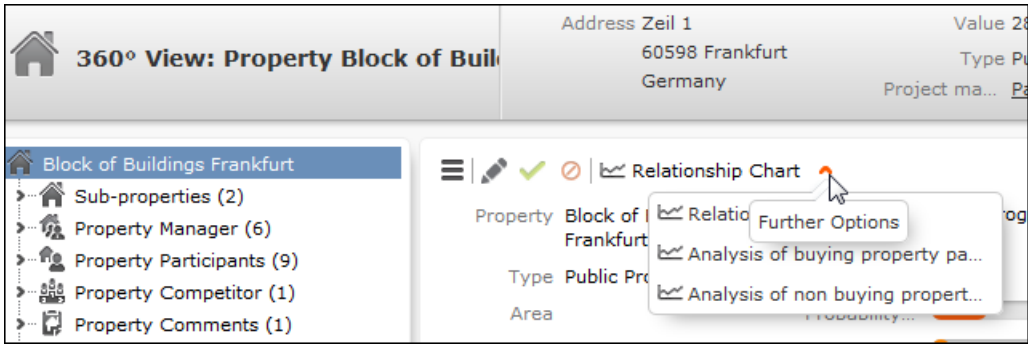
5. Save.

The value of the most recent classification is entered in the **ABC** field of the property.

For more information on portfolios, >> [Portfolios](#) on page 363.

Relationship Chart and Analyses

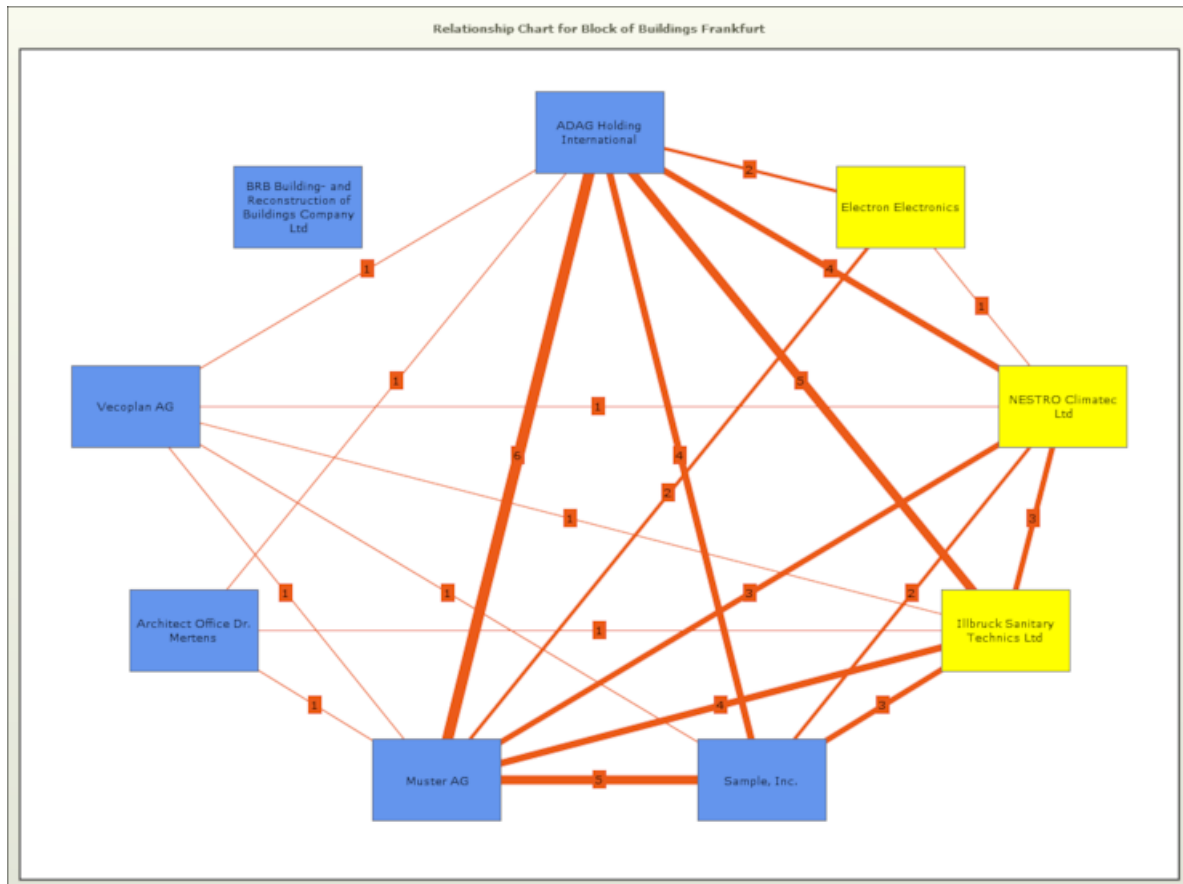
You can display the network of relationships for all participants involved in a property. This allows you to see which companies involved in a project have previously worked together on other properties.



To display the relationship chart for a property:

1. Click **Relationship Chart**.

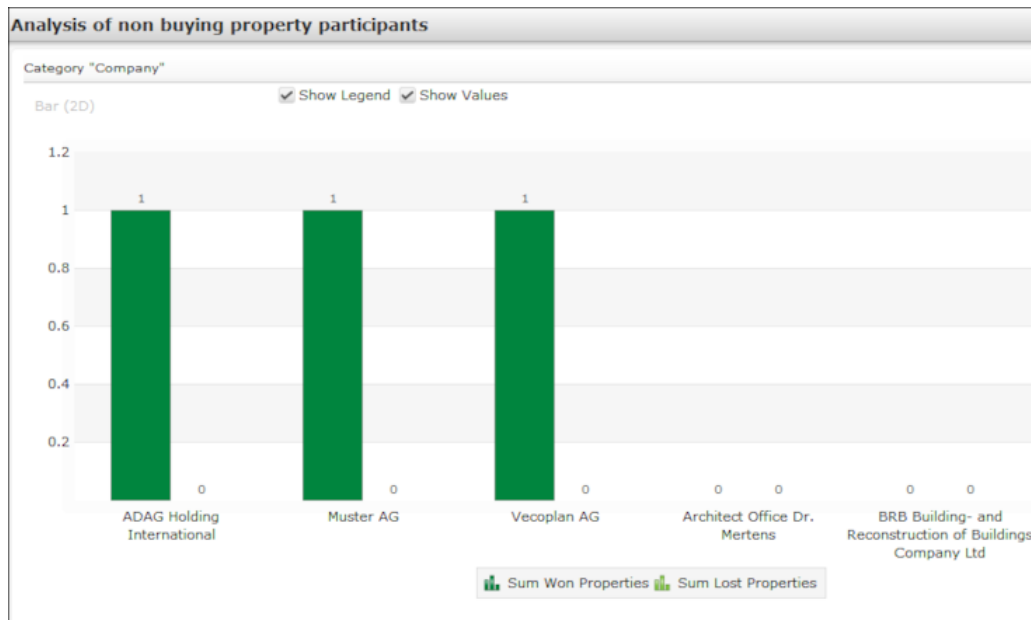
Companies are color-coded according to their current roles, the width of the connectors between companies is determined by the number of common projects carried out by the companies in the past.



In order to analyze how successful property participants have been in the past, you can display a graphical analysis of the won/lost status of previous projects involving this person.

To display the participants analysis:

1. Click on the small downwards arrow and select **Analysis of buying property participants** or **Analysis of non buying property participants**.



Additional Information on Properties

The tree view of a property displays additional information concerning a property. Click on a node in the tree to display the information stored, add new records and edit existing records.

- **Sub-properties:** You can divide a property into parts or individual steps using sub-properties.
- **Property Manager:** You can assign one or more reps to a property as managers. When adding a property, reps may be assigned to the property automatically, >> [Sales Territory Management – ISI](#) on page 238.

Reps that are currently responsible for the property (based on the dates in the **Valid from/to** fields) are color-coded in the list:

Search Property Manager	
<< < 1 - 6 of 6 > >>	
Account ...	Manage...
David Jones	Account man...
Paul Project	Account man...
Paul Project	Account man...
Mona Market	Marketing
Ben Boss	Sales Manager
Tina Talker	Technical Su...

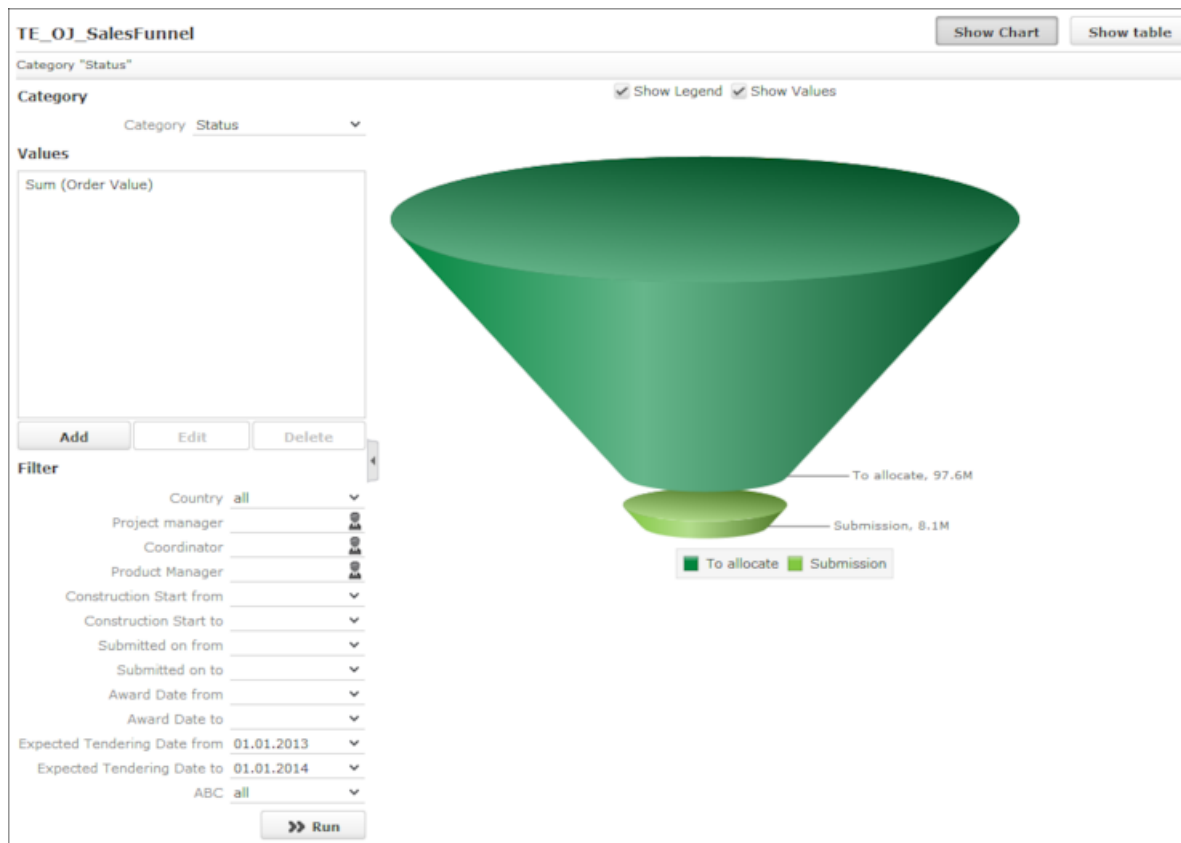
- **Property Participants:** You can select any company or person to add as a property participant. You need to specify a role for each participant within the scope of the project in the **Participation** field: Builder, architect, public authority etc. If you add activities or offers for these participants, the records are automatically linked to the property and displayed in the property tree under **Activities** or **Offers**.
- **Property Competitor:** You can add competitors to a property and enter their strengths and weaknesses. Once the tender is awarded, you can enter the **Reason** for the decision for each competitor.
- **Property Comments:** You can store comments concerning the property.
- **Products:** You can add products to properties. Use this area to store products for which no offer has been added.
- **Opportunities:** You can add opportunities that relate to a sales opportunity here. For more information on opportunities, >> [Opportunity Management – ISI](#) on page 255.
- **Offers, Orders, Activities:** You can add and display offers, orders and activities for property participants here.
- **Installed Bases:** You can add installed bases for your own and third-party products, >> [LINK](#).

Sales Funnel for Properties

The sales funnel displays the number of properties in each stage.

To access the sales funnel for properties:

1. Select  (**Queries & Analyses**) > **Property Sales Funnel**.



2. You can change which data is displayed, for example by choosing a different **Category** or defining a **Filter** and clicking on **Run**, >> [Analyses](#) on page 152.
3. Click on **Show Grid** at the top right to display the results in tabular form.

Merging Properties

Duplicate properties in the database can be merged to form a single record.

Select **Merge with** from the property's context menu (e.g. in the search results list or tab view). You can also mark the two entries in the results list you wish to merge and select **Start Merge Process** from the context menu.

Note: Merging properties is similar to merging companies, >> [Merging Companies and Persons](#) on page 352.

Property Match-up

Regularly updated information on public invitations for tenders can be acquired from various platforms, including information on the involved parties. The property match-up function allows you to import and match up this data with properties already in your Aurea CRM database.

The default implementation is optimized for IBau data; your administrator can customize the system to support other data providers. For more information on customizing the system, refer to the technical documentation.

Note: The property match-up function is not enabled by default and needs to be activated by your administrator.


You can determine which properties and participants you wish to add the Aurea CRM database and how the imported data should be matched up with properties in the database, >> [Transferring Properties to the Aurea CRM database](#).

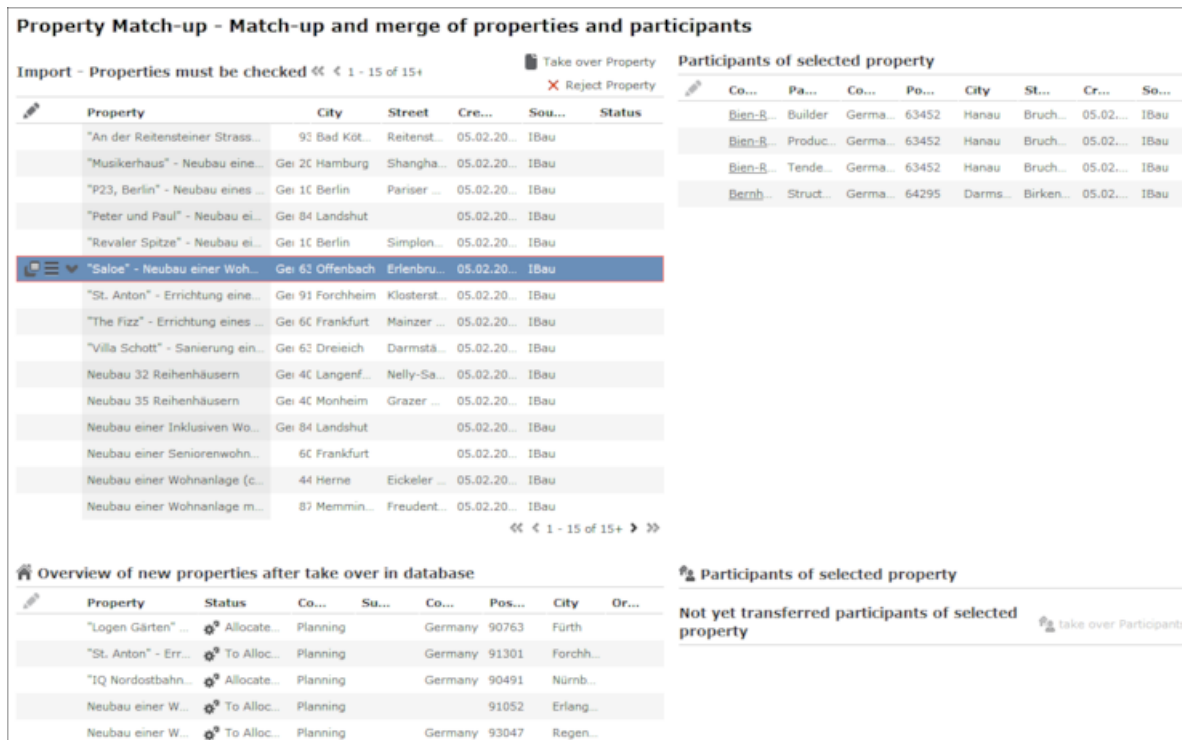
If you import a property into your database, any changes to the data concerning the platform received from the data provider can automatically be applied to the Aurea CRM database, >> [Synchronizing Data](#).

Transferring Properties to the Aurea CRM database

You can determine which properties and participants you wish to add the Aurea CRM database and how the imported data should be matched up with properties in the database.

To decide which properties and participants should be transferred to the database:

1. Select  (**Sales**) > **Property Match-up** from the menu. The properties that have been imported are listed at the top. You can choose to transfer these properties to the database or reject them.



The screenshot shows the 'Property Match-up' interface with two main sections:

Import - Properties must be checked (1 - 15 of 15+)

Property	City	Street	Cre...	Sou...	Status
"An der Reitensteiner Strass...	92 Bad Köt...	Reitenst...	05.02.20...	IBau	
"Musikerhaus" - Neubau eine...	Gei 2C Hamburg	Shangha...	05.02.20...	IBau	
"P23, Berlin" - Neubau eines ...	Gei 1C Berlin	Pariser ...	05.02.20...	IBau	
"Peter und Paul" - Neubau ei...	Gei 84 Landshut		05.02.20...	IBau	
"Revaler Spitze" - Neubau ei...	Gei 1C Berlin	Simplon...	05.02.20...	IBau	
"Saloe" - Neubau einer Woh...	Gei 62 Offenbach	Erlenbru...	05.02.20...	IBau	
"St. Anton" - Errichtung eine...	Gei 91 Forchheim	Klosterst...	05.02.20...	IBau	
"The Fizz" - Errichtung eines ...	Gei 6C Frankfurt	Mainzer ...	05.02.20...	IBau	
"Villa Schott" - Sanierung ein...	Gei 62 Dreieich	Darmstä...	05.02.20...	IBau	
Neubau 32 Reihenhäusern	Gei 4C Langenf...	Nelly-Sa...	05.02.20...	IBau	
Neubau 35 Reihenhäusern	Gei 4C Monheim	Grazer ...	05.02.20...	IBau	
Neubau einer Inklusiven Wo...	Gei 84 Landshut		05.02.20...	IBau	
Neubau einer Seniorenwohn...	6C Frankfurt		05.02.20...	IBau	
Neubau einer Wohnanlage (c...	44 Herne	Eickeler ...	05.02.20...	IBau	
Neubau einer Wohnanlage m...	87 Memmin...	Freudent...	05.02.20...	IBau	

Participants of selected property

Co...	Pa...	Co...	Po...	City	St...	Cr...	So...
Bien-B...	Builder	Germa...	63452	Hanau	Bruch...	05.02...	IBau
Bien-B...	Produc...	Germa...	63452	Hanau	Bruch...	05.02...	IBau
Bien-B...	Tende...	Germa...	63452	Hanau	Bruch...	05.02...	IBau
Bernh...	Struct...	Germa...	64295	Darms...	Birken...	05.02...	IBau

Overview of new properties after take over in database

Property	Status	Co...	Su...	Co...	Pos...	City	Or...
"Logen Gärten" ...	Allocate...	Planning		Germany	90763	Fürth	
"St. Anton" - Err...	To Alloc...	Planning		Germany	91301	Forchh...	
"IQ Nordostbahn...	Allocate...	Planning		Germany	90491	Nümb...	
Neubau einer W...	To Alloc...	Planning			91052	Erlang...	
Neubau einer W...	To Alloc...	Planning		Germany	93047	Regen...	

Participants of selected property

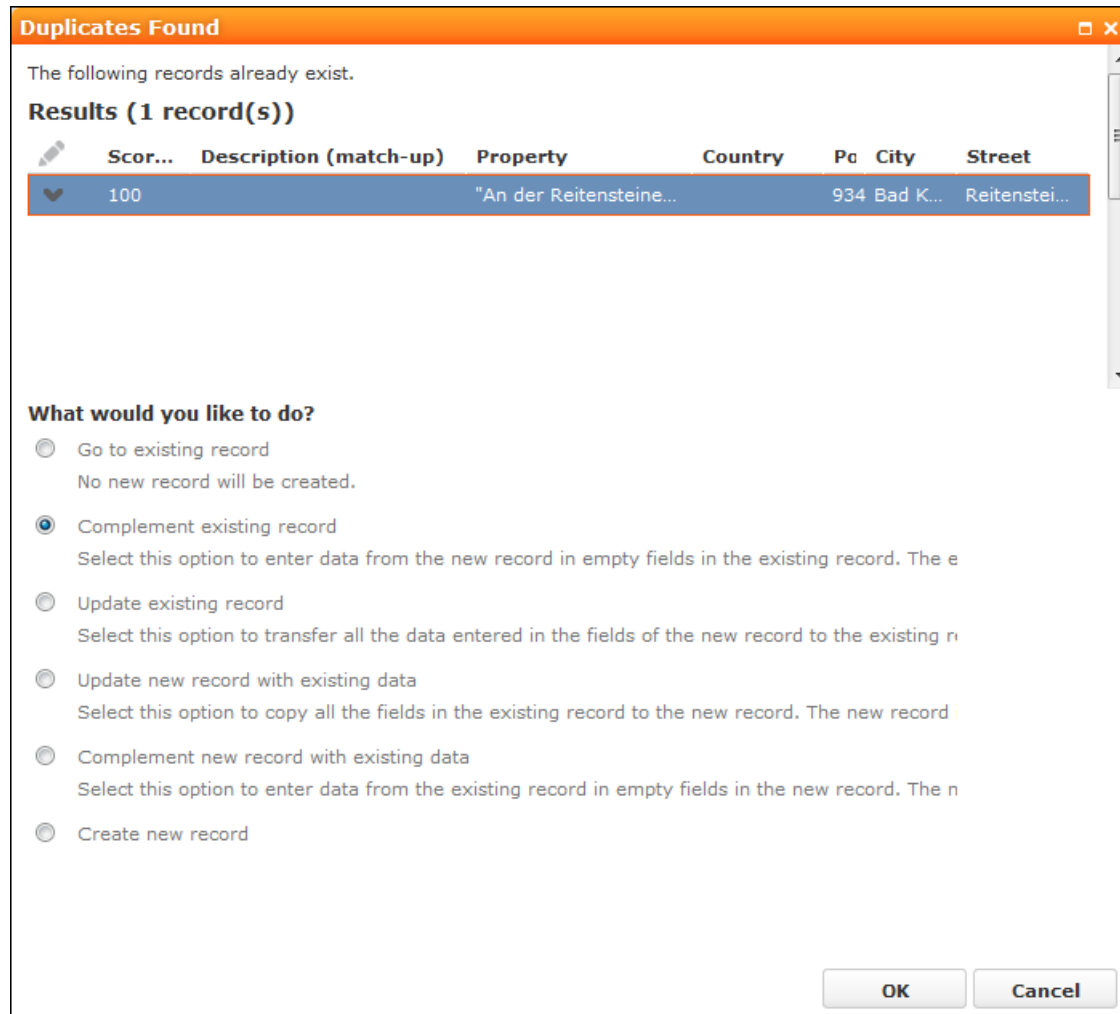
Not yet transferred participants of selected property

Take over Participants

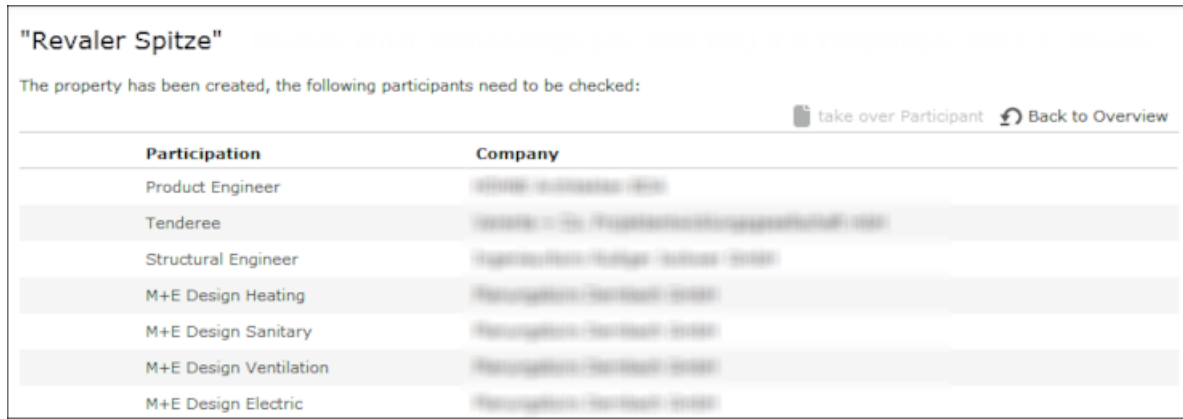
2. Select a property to edit it. The property's participants are displayed on the right.

3. Click on **Reject Property** to prevent the property from being transferred to the Aurea CRM database and from being listed for review in future. Enter a reason. Any subsequent changes to the data by the data provider is ignored.
4. Click on **Transfer Property** to open the property. Verify the data and enter any additional data. Save the record.
5. If similar properties are already present in the database, these are listed.

Note: Your administrator is responsible for defining how properties are matched up.



6. Select the desired option - generally option 2 or 3; the data is not merged if the other options are selected and the property continues to be listed for review. The new or existing record is updated with the current data.
7. Save the record.
8. If participants are also available, you can determine whether they should also be imported into the database.



9. Select a participant and click on **Transfer Participant**.

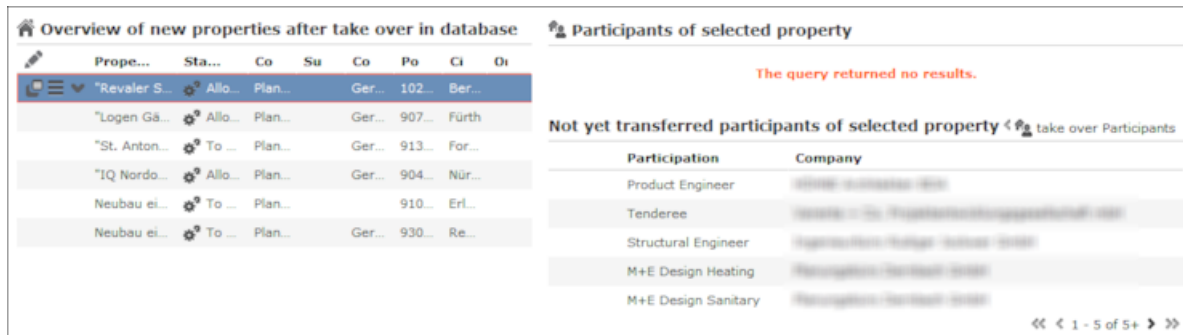
10. The company mask is displayed containing the participant's data. Verify the data and enter any additional data. Save the record.

11. If similar companies are already present in the database, these are listed. You can merge these records (as with properties).

Note: If the same company is involved with a property more than once (e.g. as an architect and project manager), the company is added when the first participation is transferred to the database. When adding the second participation, you need to merge the companies. This results in one company in the Aurea CRM web database that has two different roles for the same property.

12. Once all participants have been transferred, click on **Back to Overview** to return to the overview.

The property is displayed in the lower list. Participants that have not yet been transferred are listed on the right when clicking on a property; you can transfer these participants from here.



Synchronizing Data

If you import a property into your database, any changes to the data concerning the platform received from the data provider can automatically be applied to the Aurea CRM database.

If you have transferred a property and its participants to the database, any updates to the property data made by the data provider is automatically applied to the property in Aurea CRM. By default, property data is overwritten by this external data but companies (participants) are not updated automatically. Your administrator can change this setting.

If the data provider has added a new participant, the property is listed in the lower list of the match-up area in yellow. You can decide whether to transfer the participant to the database.

Contact your administrator if:

- You have rejected a property but then decide to add the property to the database. Your administrator can change the status from "rejected" to "empty" so that the property is again listed in the match-up area. You can then transfer the property.
- You have added a property to the database, but do not want the property to be updated automatically. Your administrator can set the status from "merged" to "rejected" so that the property remains in the database but changes made by the data provider are no longer suggested in the match-up area.

Opportunity Management – ISI

Opportunity management allows you to manage and analyze sales opportunities.

Depending on your configuration, opportunities can be added with or without the aid of the opportunity process.

The opportunity process guides you through the individual phases and the necessary steps: from the point in time that you hear of a possible sales opportunity and enter basic data up to the positive or negative conclusion and the creation of an offer.

The opportunity process supports you throughout the sales process, which may take several weeks or months. Throughout the opportunity process, you identify the involved persons (e.g. decision makers) and collect information necessary to successfully conclude the opportunity. This information is collected during the course of the process and is available at any time.

You can also manage and add opportunity participants with the buying center wall.

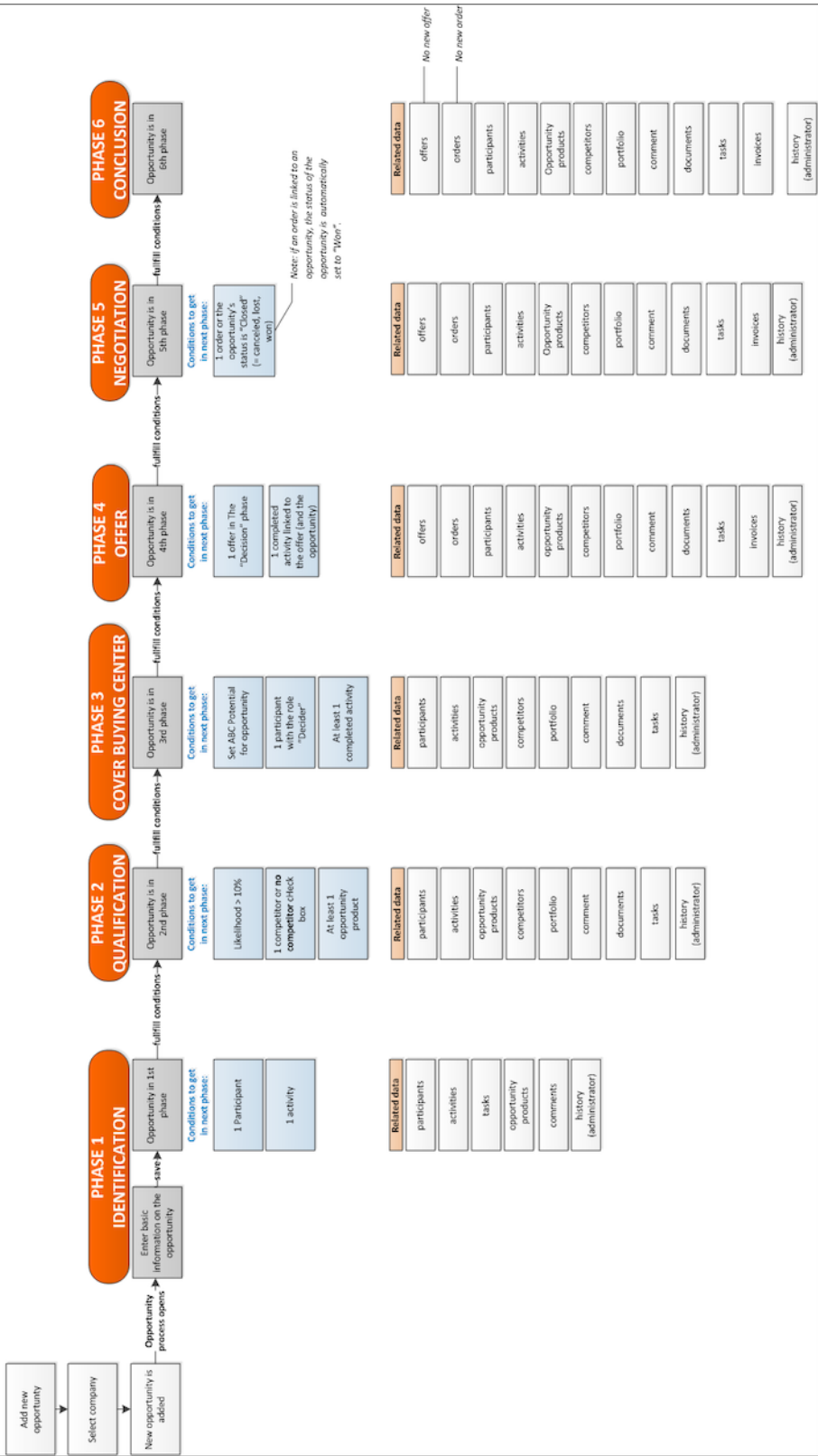
You can:

- Add opportunities without starting the opportunity process, see [Adding Opportunities without the Opportunity Process](#) on page 267.
- Add opportunities with the aid of the opportunity process, see [Starting the Opportunity Process](#).
- Add quick opportunities, see [Opportunity Process](#) on page 258 and [Starting the Opportunity Process](#).
- Enter data relating to the opportunity (see [Related Data](#)), such as:
 - Opportunity products, see [Phase 2 - Qualification](#)
 - Opportunity participants, see [Participants and Roles](#) on page 89

- Activities, see [Activities](#) on page 290
- Competitors, see [Phase 2 - Qualification](#)
- Portfolios, see [Phase 3 - Cover Buying Center](#)
- Offers, see [Phase 4 - Offer](#)
- Orders, see [Phase 5 - Negotiation](#)
- Tasks, see [Tasks](#) on page 299
- Documents, see [Documents](#) on page 312
- Notes containing additional information on the sales opportunity, see [Notes](#) on page 171
- View the sales funnel, opportunity overview, opportunity forecast and opportunity matrix, see [Analyses and Queries](#) on page 270.
- Manage opportunity participants using the buying center wall, see [Buying Center Wall](#) on page 268.

Note: You can also add opportunities from activities or leads with the **Add Opportunity** button. Depending on your system's configuration, the opportunity process may be started automatically. The activity/lead is linked to the opportunity and date entered in the activity/lead is transferred to the opportunity (e.g. products, company the activity was added for).

Opportunity Process - ISI



Opportunity Process

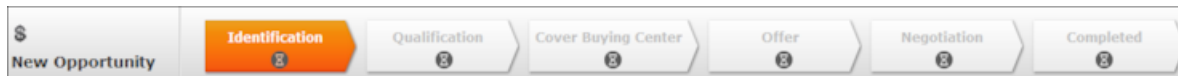
Opportunity management allows you to manage and analyze sales opportunities.

You can manage and analyze sales opportunities, starting from when you first hear of a sales opportunity until the opportunity is concluded either successfully or unsuccessfully.

Opportunities can be added for interested parties, as well as for existing customers. Throughout the sales process, you can collect information relating to the opportunity. The opportunity process and the various phases that make up the process guides you through these steps. Different information is collected in each phase. You initially only need to enter basic information; in later phases you then begin adding more detailed information, such as participants (decision makers; those affected by the opportunity) or products.

The opportunity process stores all data relating to the opportunity (participants, activities, offers etc.) and you can access this information throughout the entire negotiation period. You can always identify the current phase and which steps still need to be completed.

The opportunity process consists of the following phases:



In order to progress to the next phase, certain conditions need to be met, e.g. a participant and an activity need to have been added. Switching to the next phase occurs automatically once the necessary conditions have been met. You **cannot** switch between phases manually.

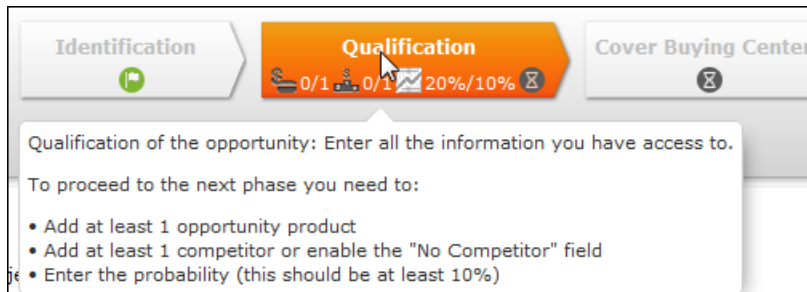
Note: If you enable the **Quick Opportunity** check box, you can switch between phases even if the prerequisites have not been met. Click on the phase arrow to switch to the desired phase.


Phase	Related Areas	Requirements for the Next Phase
1) Identification	OpportunityParticipants Activities Tasks	An opportunity has been added and the basic information entered. An opportunity participant must exist An activity must exist
2) Qualification	OpportunityParticipants Activities Opportunity Products Competitors Portfolio Note Opportunity Comments Documents Tasks	An opportunity product must exist A competitor must exist or the No Competitor field must be enabled The Probability must be at least 10% (20% is entered by default)
3) Cover Buying Center	as in phase 2	The ABC Status of the opportunity must be entered At least one opportunity participant must exist (the "Decider") At least one activity must have the status "Completed"

Phase	Related Areas	Requirements for the Next Phase
4) Offer	Offers Orders OpportunityPartic- ipants Activities Opportunity Prod- ucts Competitors Portfolio Note Opportunity Com- ments Documents Tasks	An offer must exist (which has progressed up to phase 5 (Decision in the offer process) An activity must exist for the activity (the activity is transferred to the opportunity) and its status must be "Completed"
5) Negotiation	as in phase 4	An order must exist (convert the offer to an order) or The status of the opportunity must be set to "Won", "Canceled" or "Lost"
6) Completed	as in phase 4 The opportunity can no longer be edited. No new offers can be added.	

You can enter new data or edit existing data in the related areas of a phase, see [Related Data](#).

Further information on a phase is displayed using icons in the phase arrows. Move your mouse cursor over the arrows or icons to display a tooltip.



Note: Click on  (**Timeline**) to display an overview of the participants, offers etc. added for an opportunity, see [Timeline](#) on page 97.

You can exit the opportunity process at any time and continue at a later date. If you open an existing opportunity, it is opened at the phase in the current phase. If you open and edit an offer added for an opportunity in the offer process, the conditions required to move to the next opportunity phase may be met and the opportunity is therefore opened in the next phase. The opportunity can also move to the next phase if you open an activity in the calendar and set its status to "Completed".

Note: You can use variables to change the conditions required to move to the next phase, e.g. to define that 2 opportunity participants are required in phase 2 (**Qualification**).

Users with the necessary access rights (e.g. administrators) can access the **History** tab under **Related Data**.





Tasks can be generated automatically in each phase.

For more information, see *Technical Documentation ISI Template*.

Starting the Opportunity Process

If you add a new opportunity or open an existing opportunity, the opportunity process is either started or continued.

To **add an opportunity** and start the opportunity process, do any of the following:

- Select  (**Sales**) > **Opportunities**. Start the search and click on  (**New**). Search for the company that you wish to add the opportunity for.
- Select  (**Sales**) > **New Opportunity**. Search for the company that you wish to add the opportunity for.
- Switch to the company that you wish to add the opportunity for. Click on the **Opportunities** node in the tree. Click on  (**New**).

The opportunity process is started in phase 1 (**Identification**).

1. First enter the general information concerning the opportunity:
 - The name of the **Opportunity**, the **Completion Date** and **Status** are mandatory fields.
Default values are entered in some fields.
 - You are automatically entered as the **Account manager**. You can edit this field if required.
2. Save the record.
The input mask for phase 1 (**Identification**) is displayed.
The company the opportunity was added for is automatically entered as a participant with the **Participation** set to "End Customer".

Note: To open an **existing opportunity** in the tree view, click on the **Opportunities** node and select the opportunity in the list. Click on **Manage** in the list header or select **Start Opportunity Management** from the opportunity's context menu.


You can also select  (**Sales**) > **Opportunities** to search for the opportunity and open it from the results list.

Phase 1 - Identification



Requirements for switching to the next phase

In phase 1 (**Identification**), you collect basic information concerning the opportunity. You need to add a participant and an activity. The company the opportunity was added for is automatically entered as the first opportunity participant. You can also add tasks, >> [Tasks](#) on page 299.

The screenshot displays the ISI Opportunity Management interface for a specific opportunity. At the top, a progress bar indicates the current phase is 'Identification', with subsequent phases being 'Qualification', 'Cover Buying Center', and 'Offer'. Key statistics are shown in the top right: 60 days until completion, a 20% probability, a total production value of 0 EUR, and a weighted opportunity value of 0 EUR. The main content area shows the opportunity title 'Ground-breaking prototype in Kashmir' and its status as 'In Progress'. It includes fields for 'Opportunity type' (Initial Project), 'Completion Date' (04.08.2014), and 'Status' (In Progress). There are also checkboxes for 'No Competitor' and 'Quick Opportuni...'. A 'Notes' section is available for comments. Below this is a 'Related Data' section with tabs for 'Opportunity Participants', 'Opportunity Products', 'Activities', 'Tasks', 'Note', and 'History'. A table under 'Opportunity Participants' shows a participation by 'End Customer' for the company 'Tapi Austria'.

- Click on  (**Edit**) in the **Overview** section to edit the opportunity's details.
- You can add the data such as:
 - Opportunity participants, see [Participants and Roles](#) on page 89
Select a participant and click on **New Activity** to add an activity for the participant.
 - Activities, see [Activities](#) on page 290
 - Tasks, see [Tasks](#) on page 299

To add additional data:

- Click on  on a tab under **Related Data**.
- Click on  in the upper area (**Add Participant/Add Activity** etc.). The options available to you depend on the current phase.

Once you have added an activity, the opportunity progresses to phase 2 (**Qualification**).

Phase 2 - Qualification

Requirements for switching to the next phase

- An opportunity product must exist
- A competitor must exist or the No Competitor field must be enabled
- The Probability must be at least 10% (20% is entered by default)

In this phase, you enter the probability of realizing the opportunity and begin entering opportunity products and competitors.

- Click on **Edit** in the **Overview** section to edit the opportunity's details.

You can enter the **Probability (%)** manually. You can also Enter details on the customer's attitude, budget etc. on the **Target & Evaluation** tab. The **Probability (%)** is then calculated based on your entries, see [Opportunity Fields and Calculations](#) on page 270. Once you enter a rating on the **Targets & Evaluation** tab, you can no longer edit the probability manually.

- Click on the **New** button in the **Opportunity Products** and **Competitors** tabs to add products and competitors to the opportunity, see [Opportunity Fields and Calculations](#) on page 270.

Note: You can only select companies whose **Co. Type** is "Competitor".

If you set the **Competitor Status** to either "Competitor won Against Me" or "Competitor won Opportunity", the **Status** of the opportunity is set to "lost" if the **Status** was either "In Progress" or "Rests". You can then no longer edit the opportunity.

Once you have added an opportunity product and a competitor (or have enabled **No Competitor**), the opportunity progresses to phase 3 (**Cover Buying Center**).

Phase 3 - Cover Buying Center

Requirements for switching to the next phase

- The ABC classification of the opportunity must be entered
- An opportunity participant must exist whose Participation is set to "Decider"
- At least one activity must have the status "Completed"

In this phase, you enter additional information concerning the opportunity and intensify contact with the potential customer. You need to identify at least one participant as the decision maker for the opportunity.

- Enter the opportunity participants and create activities, see [Participants and Roles](#) on page 89 and [Activities](#) on page 290.
- Click on **+** (**New**) on the **Portfolio** tab to select a portfolio, see [Portfolios](#) on page 363. Answer the questions and save.

The result of the portfolio is written to the **ABC** field.

Once you have entered an ABC classification, added an opportunity participants with the **Participation** "Decider" and one activity has the status "Completed", the opportunity progresses to the phase 4 (**Offer**).

Phase 4 - Offer

Requirements for switching to the next phase

- An offer must exist (which has progressed up to phase 5 (Decision in the offer process))
- An activity must exist for the activity (the activity is transferred to the opportunity) and its status must be "Completed"

In this phase you add a new offer.

Click on **New** on the **Offers** tab to start the offer process, see [Offer Process](#) on page 222.

In the course of the offer process, at least one activity must be added and its **Status** set to "Completed". This activity is automatically transferred to the opportunity.

Once you have reached phase 5 (**Decision**) of the offer process and have added an activity and set its **Status** to "Completed", the opportunity progresses to phase 5 (**Negotiation**).

Note: You can open and edit activities added during the offer process from the opportunity processes. To do so, click on the activity on the **Activities** tab.

If your administrator has activated the **Invoices** info area, the **Invoices** tab is displayed in the opportunity process from phase 4 (**Offer**) onwards, see [Invoices – ISI](#) on page 379.

Phase 5 - Negotiation

Requirements for switching to the next phase

- An order must exist (convert the offer to an order)
or
- The status of the opportunity must be set to "Won", "Canceled" or "Lost"

In this phase, negotiations concerning the offer are conducted. Enter date relating to the results of these negotiations in the opportunity process.

- If the customer places an order:
 - Open an offer (on the **Offers** tab) and create an order from the offer, see [Phase 5 - Decision](#) on page 231.
The order is automatically linked to the opportunity.
 - Switch to the **Offers** tab and select **Copy to Order** from the desired offer's context menu.
 - Click on **Add existing Order** button on the **Orders** tab to add an existing order to an opportunity.

Note: Once you add an order to the opportunity, the **Status** of the opportunity is set to "Won".

- If the customer does not place an order based on an offer:
 - Open the offer (on the **Offers** tab), see [Phase 5 - Decision](#) on page 231.
If the offer is rejected (**Offer has been rejected - lost**) you need to enter a competitor in the offer.
The **Status** of the opportunity is set to "Lost" and the competitor entered in the offer is transferred to the opportunity (**Competitors** tab).

Note: If you create a new version of the offer (**Offer was rejected - create new version**), the **Status** of the opportunity remains unchanged. The new version of the offer is linked to the opportunity and you can renegotiate the offer.

- If you do not add an order to the opportunity, you need to set the opportunity's status to "Won", "Canceled" or "Lost" manually.

Once you have added an offer or set the status of the opportunity to either "Won", "Canceled" or "Lost", the opportunity progresses to phase 6 (**Conclusion**).

Phase 6 - Conclusion

You can no longer edit the opportunity and related data in this phase.

You can complete the opportunity from any of the previous phases, in which case the opportunity progresses to this final phase. You can complete the opportunity by setting the Status to one of the following values:

- "Won"

If you set an offer linked to an opportunity as having been accepted (won), the status of the opportunity is automatically set to "Won", see [Offer Process](#) on page 222.

- "Lost"

After setting the status of the opportunity to "Lost", you are prompted to enter the competitor that won the opportunity. Select the competitor from the list or click on **New** to add a new competitor.

Click on **Back to Overview** to return to the process without entering a competitor.

If you set the **Competitor Status** to either "Competitor won Against Me" or "Competitor won Opportunity", the Status of the opportunity is set to "lost" if the Status was either "In Progress" or "Rests".

- "Canceled"

Related Data

Depending on the opportunity's phase, various child areas are available where you can enter information on participants, activities, competitors etc. These child records are linked to the opportunity.

Click on a record to select it. Click on **New** to add a new record; click on **New Activity for Participant** etc. to add a new record for the selected record. New records are automatically linked to the opportunity.

Double-click on a record to open and edit it.

Click on **Back to Overview** to return to the process overview from a child record **without saving your changes**. If you have edited data, you are asked whether you wish to discard your changes.

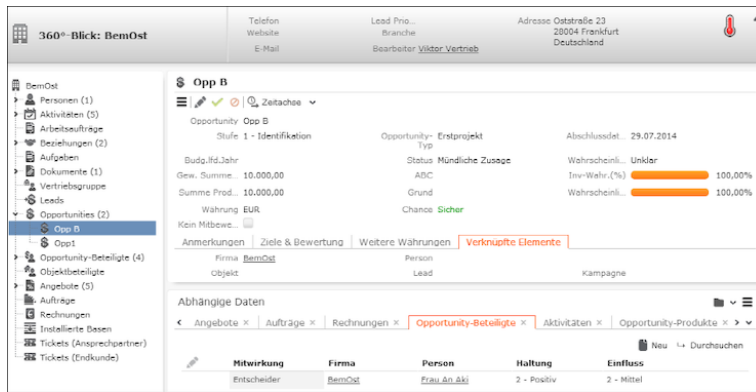
Adding Opportunities without the Opportunity Process

Your administrator can determine that the opportunity process is not started when adding opportunities.

The functions in the opportunity process are not available in this case and only the value of the opportunity (e.g. **Product value**, **Total product value**) is calculated automatically, see [Opportunity Fields and Calculations](#) on page 270.

To add an opportunity:

1. Switch to the desired company.
2. Switch to the **Opportunities** node.
3. Click on **+** (**New**). The new mask is displayed.
4. Enter the relevant data.
5. Save the record.
6. Switch to the opportunity.



You can add and display further data on the tabs under **Related Data** (e.g. participants).

7. Click on  (**Timeline/Timeline Notes**) to display the corresponding timeline.

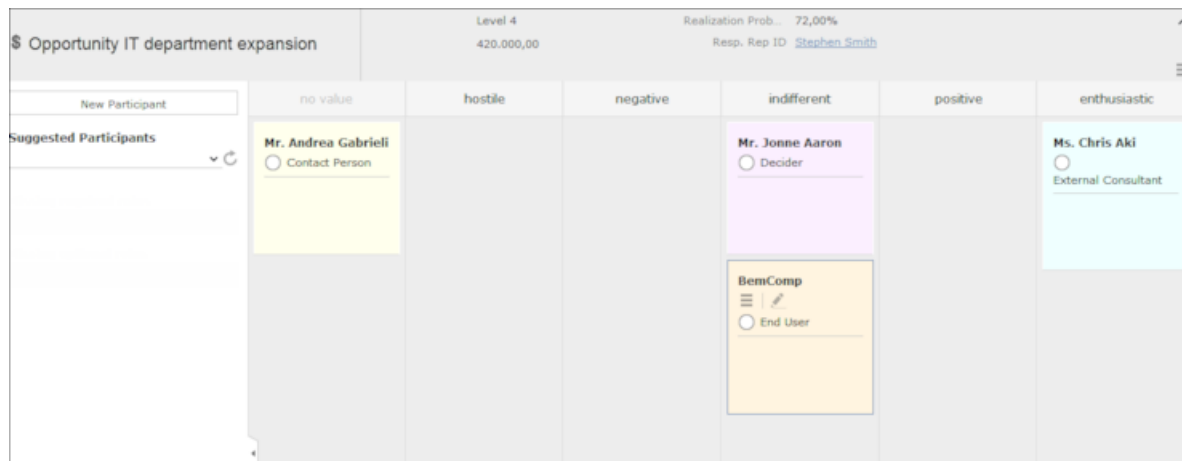
Buying Center Wall

The buying center wall display all opportunity participants and provides suggestions for additional participants.


You can display information on participants' roles (e.g. decision maker, contact person) and attitude (e.g. neutral, positive), manage participants and add notes. This allows you to keep track of individual participant's attitude and ensures that important participants are not forgotten.

To open the buying center wall, switch to the desired opportunity and select **Buying Center** from the context menu.

The buying center wall is opened.



- The opportunity's participants are displayed in the main area on the right in various columns (grouped by attitude by default).
- Opportunity participants are color-coded according to their role.
- Information on the opportunity is displayed in the header, e.g. the level.

- If a participant's attitude has changed, drag the participant to the corresponding column to update their attitude.
- Click on a participant to display the context menu and edit icons.
 - Click on  (**Edit**) to change the participant's role or enter a comment etc. Click on the circle () to set the person's **Influence** (low, medium, high).

Note: When in edit mode, you can save your changes (✓) or cancel them (⊘). You can also click on another participant to save, or press the Esc key to cancel your edit. You cannot drag and drop records while in edit mode.




- Open the context menu (☰) and select **Delete** to remove the opportunity participant.
- Click on **New Participant** in the sidebar to add a new participant to the opportunity. Choose the participant and then set their attitude by dragging the participant to the appropriate column.

Note: The same participant can be added to the opportunity with multiple roles, but can only be added once per role.

- Open the **Suggested Participants** drop-down list and select an entry to display suggested participants:
 - **from other opportunities:** Those companies and persons are listed that are involved in other opportunities with at least one of the current opportunity's participants.
 - **from activities:** Those companies and persons are displayed that are entered as participants in activities linked to the current opportunity.
 - **from corporate structure:** This options suggests companies and persons in companies within the same corporate structure as the company the current opportunity was added for. Only companies/persons that are participants in other opportunities of the same **Type** as the current opportunity are suggested.
 - **from company:** All persons in the company (KP) the opportunity was added for are suggested (excluding those that are already participants).

Drag the desired company/person from the list of suggestions below the **Suggest Participants** field to the appropriate column (e.g. indifferent) to add them to the opportunity as a participant. A corresponding opportunity participant record is added automatically and the participant's attitude is entered.

- Information is displayed in the sidebar on any missing participants. For example, you may need to add 3 consultants, but have only added one.

- Click on  or  to hide/show the sidebar and **Related Data**.
- Data related to the current opportunity is displayed under **Related Data**.
- Click on  (**Context Menu**) on the right of the header to access the context menu, e.g. select **Tab View** to open the opportunity in tab view.

Analyses and Queries

Opportunity management in Aurea CRM allows you to analyze sales opportunities in a variety of ways.

Opportunity Fields and Calculations

The following describes the most important fields and automatic calculations that take place during the opportunity process.

If you only have estimates available when first dealing with an opportunity, and have no specific details on products, enter the values directly in the opportunity. Once you add products to the opportunity, these estimates are overwritten. Once you have added an opportunity offer containing items (see [Phase 4 - Offer](#)), the values of the opportunity products are overwritten.

Estimates at the Start of the Opportunity Process

- **Total product value:** Estimated total value of the opportunity (entered manually)
- **Wtd. total product value:** The estimated value weighted by the probability of the opportunity (calculated)
- Realization probability (**Probability (%)** field): The probability of the customer placing an order with anyone.
- Investment probability (**Investment Prob. (%)** field): Probability of the customer placing an order with your company (and not with a competitor).

A further weighted value is calculated automatically:

Values in the opportunity products

- **Product value** (the absolute product value)

A weighted value is calculated automatically by the system using the probabilities entered in the opportunity as follows:

Wtd. total product value (Opportunity) = Product value * Investment Probability (%) [opportunity] * Probability (%) [opportunity]

The product values of all opportunity products are totaled and written to the **Total product value**, **Wtd. total product value** and **Wtd. total product value (Opportunity)** fields in the opportunity. Values entered manually are overwritten.

Value in the offer

The **Net Total** is calculated from the sum total of the net item prices (without the offer discount applied, but with item discounts applied (**Item Discount (%)** field).

An opportunity product record is added for each product entered in the offer items containing the following values:

- **Product value:** The value of the item
- **Wtd. total product value:** Item value weighted according to the probabilities entered in the opportunity

Note: If you add an item to an opportunity offer that corresponds to an opportunity product, the **Product value** and **Wtd. total product value (Opportunity)** are overwritten with the values in the offer.

$$\text{Wtd. product value} = \text{Product vValue} * \text{Investment Probability (\%)[offer]} * \text{Probability (\%)[offer]}$$

Opportunity products are only added or updated automatically once the status of the offer is **Order**. The status is set automatically when creating an order from the offer.

Lead Management – ISI

A lead represents a possible future customer and is normally added by the marketing department. Example - within the scope of a campaign or trade fair.

It is not always necessary or desirable to immediately add a person/company to the database.

A lead need not be linked to an existing company or person record, however you can link the lead to an existing company or person if the lead relates to the opportunity to sell a different product to an existing customer. Leads are generally added by the marketing department. The prospective customer and requirements are then further qualified by the sales team. A customer record is often not added until this point is reached.

Aurea CRM web allows you to create opportunities directly from leads. You can thus track your customer acquisition process starting from a campaign to handling leads, creating an opportunity, sending an offer and receiving an order. You can then analyze this data.

Note: The lead management functions are not activated by default and need to be activated by your administrator.

An existing customer may be added as a lead for a new product line.


Use lead management to:

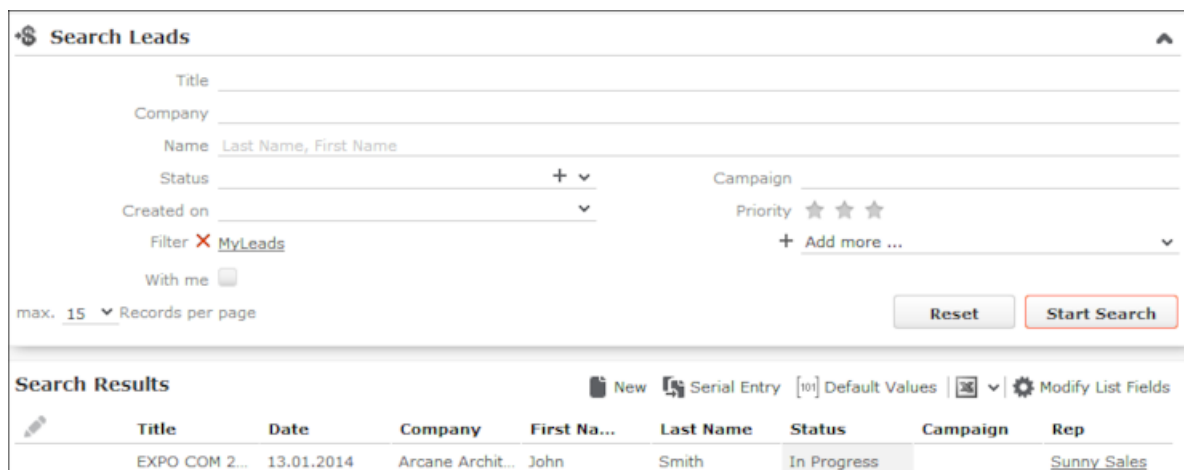
- Display an overview of your leads, see [Lead Overview](#) on page 272.
- Add leads (without a company record), see [Adding Leads](#) on page 273.
- Add leads for companies in the database, see [Adding a Lead for an Existing Company/Person](#) on page 274.
- Use the serial entry function to quickly add multiple leads, see [Serial Entry Function for Leads](#) on page 275.
- Add a company, person or opportunity for a lead, see [Adding Companies, Persons and Opportunities for a Lead](#) on page 277.

Lead Overview

Learn how to display overview of your leads

You can display an overview of your leads:

- Leads are displayed on sales reps' start pages
- All reps can display their leads using the search ( (**Sales**) > **Leads**):
 - The "MyLeads" filter restricts the search to only those leads assigned to you and whose status is either "In Progress" or "Created":



Title	Date	Company	First Name	Last Name	Status	Campaign	Rep
EXPO COM 2...	13.01.2014	Arcane Archit...	John	Smith	In Progress		Sunny Sales

Click on **X (Remove)** to remove the filter from the search mask.

- Enable the **With me** option to restrict the search to those leads where you are entered as the rep, irrespective of the status of the lead.

Click on **o (Reset)** to clear all search settings, including the **My Leads** filter.

- If a lead is no longer relevant, set the lead's **Status** to "Closed". If another rep is responsible for the lead, enter the rep in the **Rep** field.

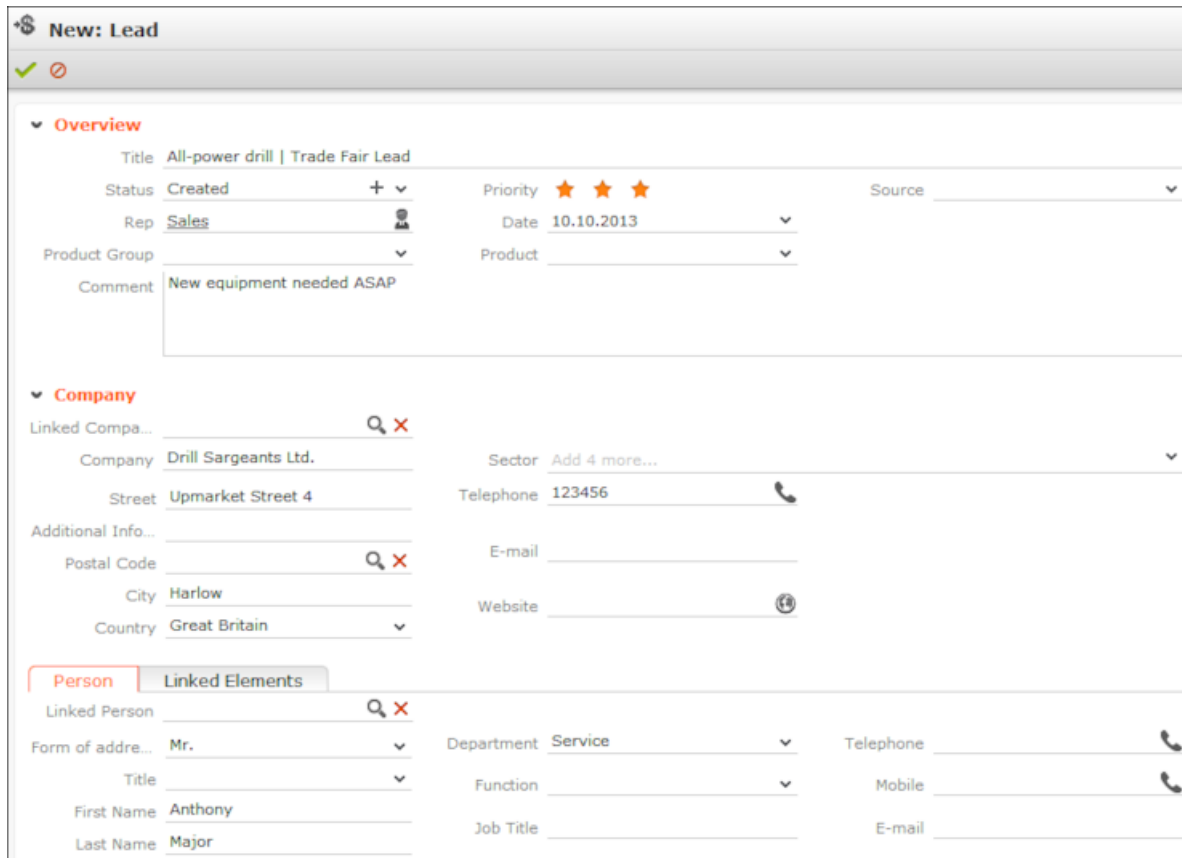
Note: The lead is no longer displayed when using the **My Leads** filter in either case.

Adding Leads

Learn how to add lead.

To add a lead:

1. Select  (**Sales**) > **New Lead**.




New: Lead

✓ ✕

Overview

Title All-power drill | Trade Fair Lead


Status Created + ▾ Priority ★ ★ ★ Source _____ ▾

Rep Sales  Date 10.10.2013 ▾


Product Group _____ ▾ Product _____ ▾

Comment New equipment needed ASAP


Company


Linked Compa... _____  ✕

Company Drill Sargeants Ltd. Sector Add 4 more... ▾

Street Upmarket Street 4 Telephone 123456 


Additional Info... _____


Postal Code _____  ✕ E-mail _____


City Harlow Website _____ 

Country Great Britain ▾

Person **Linked Elements**

Linked Person _____  ✕

Form of address... Mr. ▾ Department Service ▾ Telephone _____ 

Title _____ ▾ Function _____ ▾ Mobile _____ 

First Name Anthony Job Title _____ E-mail _____

Last Name Major

You can also add leads from a person or activity's context menu. Links to the following info areas are entered automatically or transferred from the source record (if available) : **Company, Person, Campaign, Activity, Ticket and Installed Base**.

2. Enter information on the lead, such as:
 - **Title:** The lead's subject
 - **Source:** Information on the source of the lead, e.g. "Personal Contact"
 - **Product Group, Product:** Information on the product that the lead is interested in

- **Type:** Type of lead (cross-selling, initial project, up-selling)
 - **Business Card:** You can upload an image of the lead's business card.
3. The following information is entered automatically: **Status** = "Created", **Date** = current data, **Rep** = current rep, **Priority** = low.
 4. To assign the lead to another rep, enter the desired rep in the **Rep** field.
 5. To link the lead to a customer already entered in the database (e.g. up-selling), enter the company/person in the **Linked Company** and **Linked Person** fields. You can also add leads from a company stored in the database, see [Adding a Lead for an Existing Company/Person](#) on page 274.
 6. Click on **+** (**Add Opportunity**) to add an opportunity for a lead, see [Opportunity Management – ISI](#) on page 255.
 7. Save.

Adding a Lead for an Existing Company/Person

Learn how to add a lead for an existing company/person.

To add a lead for a company/person already present in the database:

1. Switch to the desired company/person.
 - Switch to the **Leads** node in the company tree and click on **+** (**New**).
 - Select **New Lead** from the person's context menu.
2. Enter the data.
3. Click **Save**.



The screenshot displays the CRM interface for a lead record. The top header shows '360° View: Company Cranes' and various fields: 'Teleph...', 'Website', 'E-mail', 'Lead P...', 'Sector Advice and engine', 'Rep (N...', 'Address Salesianergasse', '1030 Wien', 'Austria'. The left sidebar shows a tree view with 'Leads (1)' selected, containing 'Interest in eco-friendly power tools'. The main content area shows the lead details: 'Title Interest in eco-friendly power tools', 'Status Created', 'Priority' (two stars), 'Source', 'Rep Harry HelperTest', 'Date 10.10.2013', 'Product ...', and 'Comment'. Below the details is a 'Linked Elements' table with columns 'Company' and 'Person'.

Linked Elements		Company	Person
Company	Cranes inc.	Campaign	Installed ...
Person		Activity	
Opportun...		Ticket	

Serial Entry Function for Leads

Use the serial entry function to add multiple leads one after another, e.g. at a trade fair.

Do the following to add multiple leads:

1. Select  (**Sales**) > **Leads** from the menu, start the search and click on  (**Serial Entry**).

The input mask for new leads is displayed at the top of the page. A list of the most recently added leads is displayed below the input mask.

\$ **New: Lead**

✓ ↶ Back to search

Overview

Title

Status **Created** + ▾

Priority ★ ★ ★

Source

Rep Simon Seller Test 👤

Date **10.10.2013** ▾

Product Group

Product

Comment

Company

Linked Comp... 🔍 ✕

Company

Sector **Add 4 more...** ▾

Street

Telephone ☎

Additional Inf...

Postal Code 🔍 ✕

E-mail

City

Website 🌐

Country ▾

Person

Linked Elements

Linked Person 🔍 ✕

Form of addr... ▾

Department ▾

Telephone ☎

Title ▾

Function ▾

Mobile ☎

First Name

Job Title

E-mail

Last Name

☐ ▾ ☰


☰ My recently created Leads ▾ ✕

Results (5 record(s))

	Title	Date	Company	First Name	Last Name	Status	Rep
🔍	Expo-COM 2013	07.10.2013	Arcane Archite...	John	Smith	Created	SU0001
	Fred	07.10.2013				Created	SU0001
	Interested pers...	07.10.2013	Made-up Comp...	Frank	Benalli	Created	SU0001
	Lead with no co...	10.10.2013				Created	SU0001
	This is a test	10.10.2013	Fred			Created	SU0001


2. Enter information on the lead.

Note: You can define default values that are entered in all leads. To define default values, select (**Sales**) > **Leads** from the menu, start the search and click on ^[10] (**Default Values**, see [Default Values](#) on page 91. Define default values for the title and campaign to quickly enter leads, e.g. at a trade fair. You cannot override fields that are entered automatically (**Status**, **Date**, **Rep**) with default values.


3. Click **Save**. The input mask for the next lead is displayed.
4. Click on  (**Back to search**) to return to the lead search.

Adding Companies, Persons and Opportunities for a Lead


This topic explains how to add a company/person and an opportunity for a lead. To add a company/person and an opportunity for a lead, do the following:

1. Select  (**Sales**) > **Leads** from the menu and open the desired lead.


If a company has not yet been added for the lead, you can do so:

1. Click on  (**Add Company/Person**).
2. The company mask is displayed and you can enter the company data. Some fields are automatically transferred from the lead. The lead status of the company is set to "Interest".
3. Save the company.

If a company has been added for the lead, you can add a person:

1. Click on  (**New Person**) to add a person. Information entered on the person in the lead is automatically entered in the person mask.
2. Complete the data and save the record.

If a company has been added for the lead, you can add an opportunity:

1. Click on  (**New Opportunity**) to add an opportunity. Some fields are completed automatically and relevant information entered in the lead is automatically transferred to the opportunity (e.g. the **Type** of lead).

If a product group and product are entered in the lead, a corresponding opportunity product is added automatically.

2. Complete the data and save the record.
3. The status of the lead is set to "Closed - Opportunity created".
4. The company's lead status is set to "Lead" (if the company was not already a "Customer").
5. The opportunity process is opened, see [Opportunity Process](#) on page 258.

If the opportunity is won or an order is added, the company's lead status is automatically set to "Customer".

Item Master Management

You can enter data on items in the item master in Aurea CRM.

The item master stores all items.


You can:

- Add **items**, see [Item Master](#)
- Enter **multi-lingual descriptions** of each item, see [Item Master](#)
- Automatically transfer **item details** to other info areas (e.g. offer items, installed base items etc.)
- Group your items within **product groups** and **products**
- Add **complex price structures** in various currencies with sales prices, time-limited offers, and bulk prices and discounts which are used to automatically calculate the sales price, see [Price Lists](#) and [Bulk Volumes](#)
- Add sales area items for sales management purposes, see [Sales Areas](#)

Item Master

Item No.	Price List	Currency	Selling Price	Purchase Pr...	Min. Pr...	Min. Qty	Valid from
E003	Standard	EUR	6.000,00	3.500,00	4.500,00	1	
E003	Standard	USD	1.099,00	420,00	850,00		01.05.2013

The **Item Master** info area stores basic information about individual items.

To add a new item, select  (**Sales**) > **Item Master**, start the search and click on **(+)** (**New**).


The **Product Group** and **Product** fields access catalogs. The **Product** 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 category can be selected in the **Product** field.

You can define any number of price lists for each item, and enter descriptions in various languages, see [Price Lists](#) and [Item Master Text](#).

The following info areas access the item master:


- **Offer Item**
- **Order Item**
- **Stock**

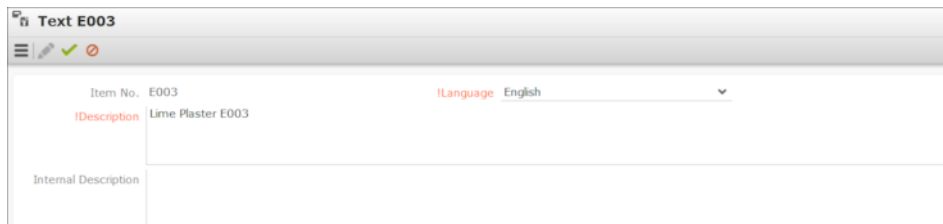
- **Stock Control Item**
- **Installed Base**
- **Components**
- **Skill**
- **Bulk Volumes**
- **Ticket**
- **Sales Area (Item)**
- **Service Contract Item**

Click on  (**Select**) next to the **Item No.** field in these info areas to select the desired item. Data from the item master is transferred to the record (e.g. **Item No.**, **Item name**, **Business Area** etc.).

Item Master Text

To add a new item master text:

1. Switch to the desired item in the **Item Master** info area.
2. Click on  (**New**) on the **Item Master Texts** tab.



The screenshot shows a web form titled "Text E003". It has a header bar with a menu icon, a pencil icon, a checkmark, and a red 'X' icon. Below the header, there are two rows of input fields. The first row contains "Item No. E003" and "Language English" with a dropdown arrow. The second row contains "Description Lime Plaster E003" and "Internal Description" with a large text area below it.

3. Select the **Language**. If you do not select a language, the description applies to all languages for which no description has been entered.
4. Enter a **Description** (for the customer) and, if necessary, an **Internal Description**.
5. Save the record.

If you open an offer or order items that reference this item, the item master text is transferred to the **Description** field (in the **Language** entered in the offer or order).

Price Lists

Any number of price lists can be defined per item. The price list is used to determine the sales price of the item in offers, see [Offer Management – ISI](#) on page 221.

There are three types of price lists:

- **Individual Price Lists:** Price list for an individual company (**Indiv. Price List** field)
- **Customer Group Price Lists:** Price list for a group of companies (**Customer Group Price List** field)
- **Country Price Lists:** Price list for a specific country (**Country** field)

Only **one** of the three fields may contain an entry in each price list. When determining the price of an item, the individual price list is applied first. If no suitable individual price list is available, a customer group price list is used, and finally the price list for a country is used if no other list is found, see [Pricing](#) on page 234.

The **Currency** entered in the **Price List** and **Offer** info areas **must** match, as no currency conversion takes place when adding offers.

To add a price list:

1. Switch to the desired item in the **Item Master** info area.
2. Click on **+** (**New**) on the **Price List** tab.

Price List Standard		
Customer Group P... Standard	Selling Price: 1.099,00 USD	Valid from: 01.05.2013
Indiv. Price List	Purchase Price: 420,00 USD	Min. Qty
Country	Min. Price: 850,00 USD	
Bulk Volumes		
1st Volume Price: 1.000,00	1st Volume Dscnt.%	0,00%
2nd Volume Price: 980,00	2nd Volume Dscnt. ...	0,00%
3rd Volume Price: 970,00	3rd Volume Dscnt.%	0,00%
4th Volume Price: 950,00	4th Volume Dscnt.%	0,00%
5th Volume Price: 940,00	5th Volume Dscnt.%	0,00%
6th Volume Price	6th Volume Dscnt.%	0,00%
7th Volume Price	7th Volume Dscnt.%	0,00%
8th Volume Price	8th Volume Dscnt.%	0,00%
9th Volume Price	9th Volume Dscnt.%	0,00%
10th Volume Price	10th Volume Dscnt. ...	0,00%

3. Enter a price list, prices and a date in the **Valid From** field.
4. Enter further data such as volume prices and volume discounts, see [Bulk Volumes](#).
5. Save the record.

Note: Assign the price list to be used by a company in the **Company** info area (**Customer Group Price List**, **Indiv. Price List** and **Country** fields). The customer group price list can also be entered in offers and orders (**Customer Group Price List** field).

Select  (**Sales**) > **Price Lists** to search for price lists.

Bulk Volumes

You can define bulk volume ranges for items. The numbers can also include decimal places. These volumes define the quantities for the corresponding bulk prices and discounts that apply to an item. You can define discounts (either as fixed **volume prices** or as **volume discounts**) in price lists for items, see [Price Lists](#). If both a bulk discount and a bulk price are entered, the bulk price takes precedence. The quantities defined in the **Bulk Volumes** info area determine the quantities of the various volumes and thus the quantities up to which the **volume price** or **volume discount** applies.

When adding new records, information is transferred from the item master (e.g. **Product Group**, **Product**). You can define various quantities used to define volume prices and discounts for each item, for example:

1st Volume = 5	The 1st volume price and discount apply for 1-5 units
2nd Volume = 10	The 2nd volume price and discount apply for 6-10 units
3rd Volume = 20	The 3rd volume price and discount apply for 11-20 units
4th Volume = 30	The 4th volume price and discount apply for 21-30 units

The quantity scale applies to all price lists created for this particular item.

To define bulk volumes:

1. Switch to the desired item in the **Item Master** info area.
2. Click on **+** (**New**) on the **Bulk Volumes** tab.

Bulk Volumes E003		
Overview Item No. E003 Product Group Finishings Product Interior Plaster		
Bulk Volumes		
1st Bulk Vol. 50,00	5th Bulk Vol. 200,00	9th Bulk Vol.
2nd Bulk Vol. 75,00	6th Bulk Vol. 400,00	10th Bulk Vol.
3rd Bulk Vol. 100,00	7th Bulk Vol.	
4th Bulk Vol. 150,00	8th Bulk Vol.	

3. Enter the desired volumes.
4. Save the record.

Item Structure in the Quick Add Area

You can define item structures in Aurea CRM in order to depict products in your product catalog, or components in a product consisting of multiple items (e.g. a bicycle composed of a frame, breaks, tires, saddle etc.).

Note: Item structures are normally imported. For further information contact your administrator. The item structure is tenant-specific (**IS-TenNo** field). Only those items assigned to the current rep (or group) are displayed in the quick add area and item structure.

The item structure is defined by linking items in the product master with one another within a hierarchy. Your administrator can determine that the item structure is displayed as a tree in the quick add area, allowing you to select items in the tree. The selected item and all its child items are then displayed in the quick add area.

If you open the quick add area, the tree view is displayed on the left, and the quick add area on the right displays all items, including those not in the item structure, >> [Quick Add](#) on page 165. All items continue to be listed in the quick add area until an item is selected from the tree.

The screenshot displays a CRM interface for managing bicycle products. On the left, a tree view shows the hierarchy: Bicycle > Street Bike > Mountain Bike (selected) > Brakes XS, Frame (MB), Gearshift (MB) > Gearshift LX, Gearshift XT, Gearshift XTR, Wheel (MB) > Racing Bike. The main area shows a list of items with columns for Item No., Item name, Quantity, Selling Price, and Discount (%). The 'Wheel Rim' item (b204-12) is selected and highlighted in blue, with a quantity of 2,00 and a selling price of 40,00. Below the list, the 'Related Data' section shows details for the selected item: Item name: Wheel Rim, Item No.: b204-12, Delivery Date, Product Gro...: Cycling, Product, Price List, and Description.

- Click on ▶ or ▼ in the tree to show/hide items (nodes).
- Click on an item in the tree to display that item and those items below it in the hierarchy in the quick add area.

Note: Your administrator can however determine that the selected item (node) in the tree is not displayed in the quick add area. Your administrator can also determine the sort order of items in the tree or that only structure nodes (e.g. "Gearshift (MB)") are displayed in the tree, but not items ("Gearshift LX").

- Search criteria and filters (e.g. **All**) are applied to the selected item and child items displayed in the list.

For example, enter all or a portion of an item's number in the **Item No.** field to restrict the display to only those items with a matching number. For example, if you select the **Mountain Bike** node in the tree and enter "*04*", only items c204-1, c204-11, c204-12 and c204-13 are displayed in the list.

Note: Click on the **Overview** filter button to remove the current selection from the tree and display those items in your shopping cart. Clicking on the **Last Entries** filter button also removes the current selection from the tree. If the **Overview** or **Last Entries** filters are enabled and you click on an item in the tree, the **All** filter is automatically applied.

- Click on **Deselect** to clear the selection in the item tree. Filters and search criteria apply to the display of all items in the quick add area, irrespective of whether they are in the item structure or not.
- Drag the separator between the tree and quick add area to change the width of the tree.

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:

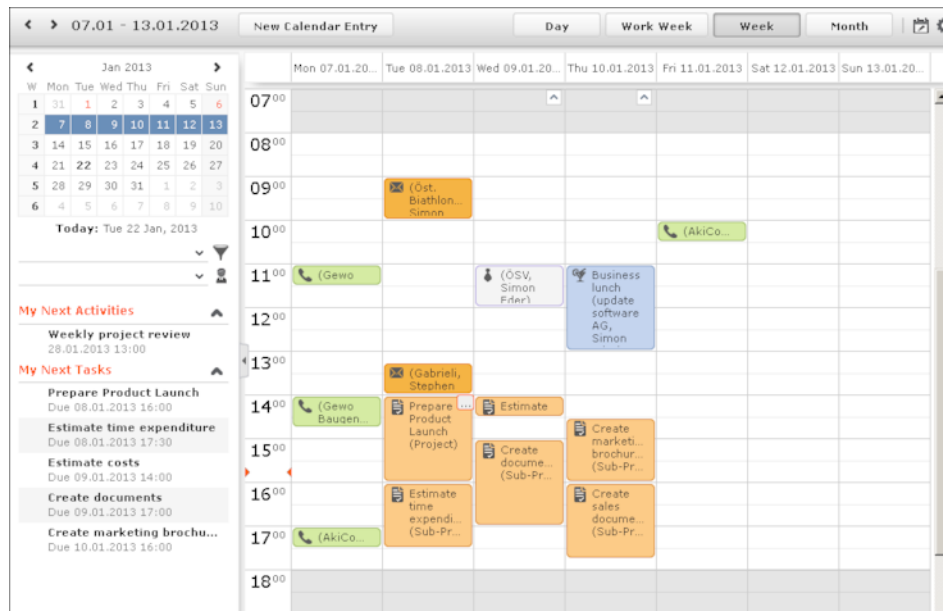
- Display an overview of your appointments in the calendar, see [Calendar](#) on page 284.
- Display, edit and delete appointments, see [Adding Appointments](#), [Adding Activities](#), [Adding Tasks](#) and [Adding Absences](#).
- Use filters to determine which appointments are displayed in the calendar, see [Filtering Appointments](#) on page 287.
- Handle conflicting appointments, see [Appointment Planning](#) on page 289.
- Send and reply to e-mails from appointments, see [Activities and E-mails](#).
- Store information such as absences, see [Absences](#) on page 301.
- Use tasks, reminders and To-Dos to structure your work, see [Tasks](#) on page 299.
- Schedule customer visits in the daily and weekly planning view, see [Daily and Weekly Planning](#) on page 302.
- Display the availability of reps in the resource view, see [Resources](#) on page 304.



Calendar

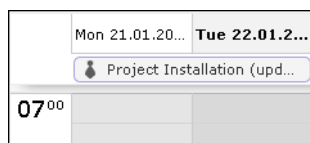
The calendar displays activities, tasks and absences.

To open the calendar:

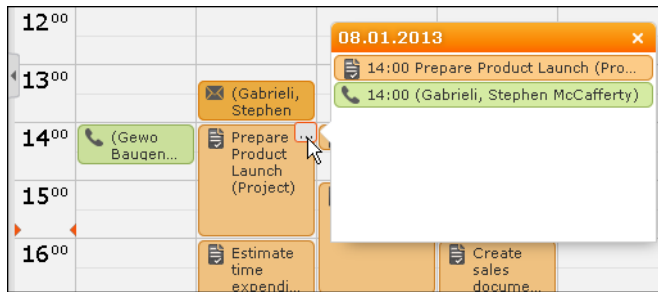
1. Select  (**Collaboration**) > **Calendar**.



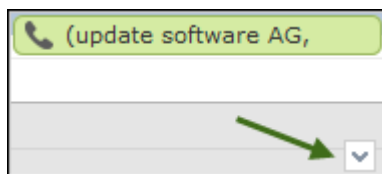
- Different types of appointment are indicated using different icons (for telephone calls, visits etc.). Click on  (**Edit Settings**) to determine how appointments are color-coded (e.g. by type or rep).
- Click on  (**Legend**) to display an overview of the color-coding in the calendar.
- Click on the 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).



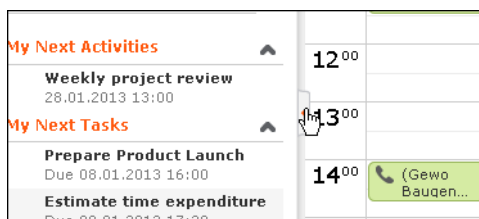
- Concurrent appointments cannot be displayed in the week view of the calendar. Click on "..." to display these appointments in a new window.





- 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, see [Filtering Appointments](#) on page 287.
- Holidays are color-coded. Select  (**Settings**) > **User Configuration** to choose your holiday calendar, see [Date & Time Tab](#).
- 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), see [Date & Time Tab](#). You need to close and restart your web browser to display the new time zone in the calendar.

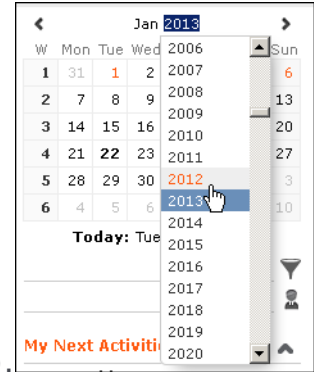
Navigating in the Calendar

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, see [Daily and Weekly Planning](#) on page 95.

Adding Appointments

To add a new appointment in the calendar:

- 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, see [Adding Activities](#), [Adding Tasks](#) and [Adding Absences](#).

- Select whether to add a new activity, absence or task, or to add a new activity for yourself, your company or the last company/person you viewed, see [Appointment Types](#) on page 290.



3. When adding an activity, select the company or person the activity should be added for.
4. Enter the details and save.

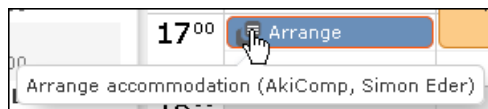
You can also add an activity for yourself as follows:

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, see [Appointment Types](#) on page 290.

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:



The predefined filter "no emails, no missed" allows you to hide e-mails and missed appointments. Furthermore, only absences entered for the current year and only open tasks are displayed.

Note: Activities of the type "E-mail" or not displayed in the calendar by default. If you wish to display these activities, contact your administrator to remove this fixed filter.

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, see [Conditions](#) on page 109.
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.

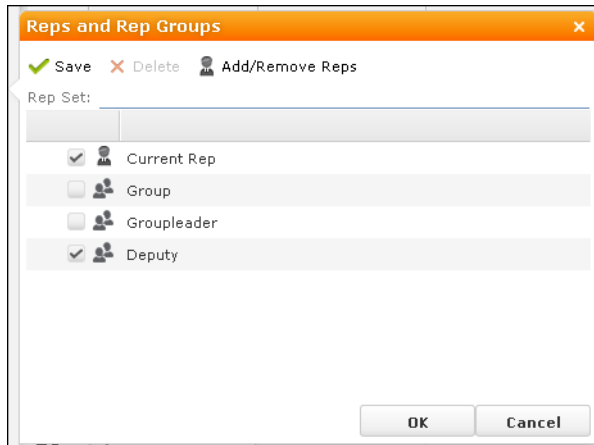
Note: The first value in the drop-down list has no name; however you can select this entry and change its settings. Changes made to this entry are saved automatically. To delete a filter set, select the desired filter from the drop-down list, click on ▼ (**Define Filters and Filter Sets**) and then click 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, see [Selecting Reps](#) on page 86.
 - 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.

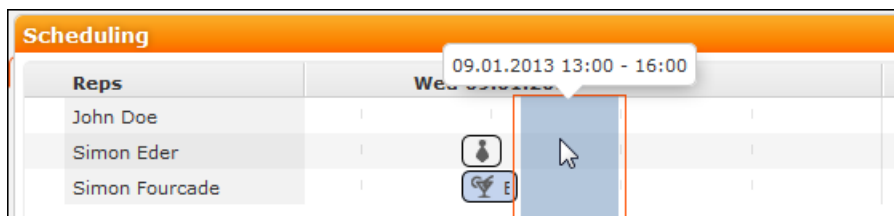
Note: The first value in the drop-down list has no name; however you can select this entry and change its settings. Changes made to this entry are saved automatically. To delete a rep filter set, select the desired filter from the drop-down list, click on **Reps and Rep Groups** and then click on **Delete**.

5. Click on **OK**.

Appointment Planning

Learn about appointment planning.

The appointment planning area is opened automatically if appointments conflict. To open it manually, open an activity, switch to edit mode and click on **Appointment Planning**. You can move the appointment in this area while taking into account the availability of all reps.



Note: Enable the check for conflicting appointments in the user settings, see [Activities Tab](#). Conflicting appointments are only checked when adding activities from

outside the calendar. Conflicting appointments are displayed next to one another in the calendar.

Appointment Types

Learn about appointment types.

Activities are used to store details regarding contact with customers, see [Activities](#) on page 290.

Tasks allow you to store tasks, e.g. what needs to be completed within the scope or projects (which may be customer-independent), see [Tasks](#) on page 299.

Absences allow you to store absences, e.g. sick leave, vacations, visits to doctors etc., see [Absences](#) on page 301.

Activities

Learn about Activities appointment type.






You can add an activity as follows:

- In the calendar, see [Adding Appointments](#).
- From outside the calendar, see [Adding Activities](#).

Adding Activities



To add an activity:

1. You can add an activity as follows:

- Select  (**Collaboration**) > **New Activity**. Select who the activity should be added for (person, company, opportunity participant etc.). Search for and select the desired company or person. Select the type of activity (Telephone, Visit, Letter etc.). Click on **Select**.
- Select  (**Collaboration**) > **Activities** and click on **Start Search**. Click on  (**New E-mail** to add an e-mail activity.
- Switch to the **Activities** node in the company/person tree view and click on  (**New E-mail**).
- Select  (**Collaboration**) > **New E-mail** to add an e-mail activity.

that were achieved. Enter information on the product group that the activity related to.



- **Linked Elements:** The following options are available:
 - you can enter a questionnaire (either manually or within the scope of a marketing activity) that should be answered within the scope of the activity, see [Carrying Out a Survey](#) on page 372.
 - you can enter a person's response to a marketing activity here, see [Responses](#).
 - link the activity to various other records. This can occur automatically as part of a process or you can enter the link manually in the appropriate field.

7. Save the record. The activity is displayed in the company's tree view.
8. You can add additional external participants, see [Adding External Participants](#).
9. You can add documents to the activity on the **Documents** tab under **Related Data**. The number of documents is displayed in the **Number of Attachments** field on the **Linked Elements** tab.
10. Click on  **(Add Lead)** to add a lead relating to the activity, see [Lead Management – ISI](#) on page 271.
11. Click on  **(Add Opportunity)** to add an opportunity relating to the activity, see [Opportunity Management – ISI](#) on page 255.

Activity Templates

If you regularly add similar activities, you can save the activity data in an activity template and use the template when adding an activity, reducing the time it takes to enter data.

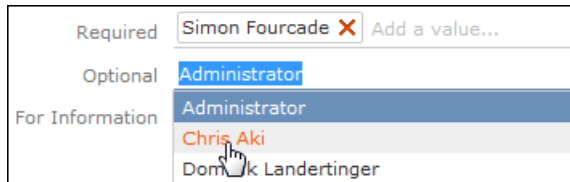
To add an activity template:


1. Select  **(Collaboration)** > **Activity Templates**.
2. Click on  **(New)**.
3. Enter the data.
4. Save the record.

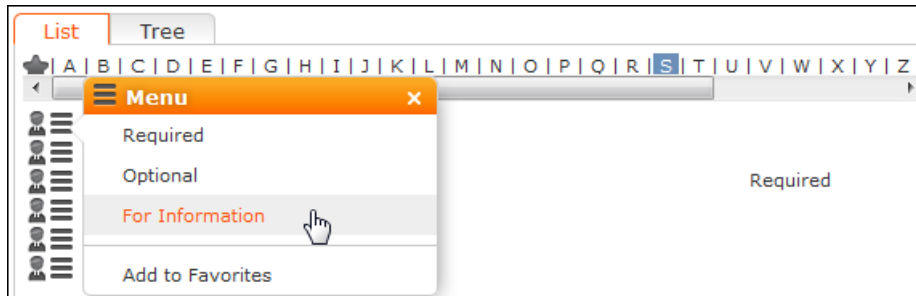
Adding Internal Participants

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, see [Selecting Reps](#) on page 86. 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, a person linked to the current company 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.

Follow-up Activities

To add a follow-up activity for an activity:

1. Select **Follow-up Activity** from the activity's context menu.
2. Enter the details of the follow-up activity.

Note: Your administrator can define which field values are automatically transferred from the previous activity.

3. Save the record. The new activity is linked to the previous activity via the **Previous/Main Activity** field.

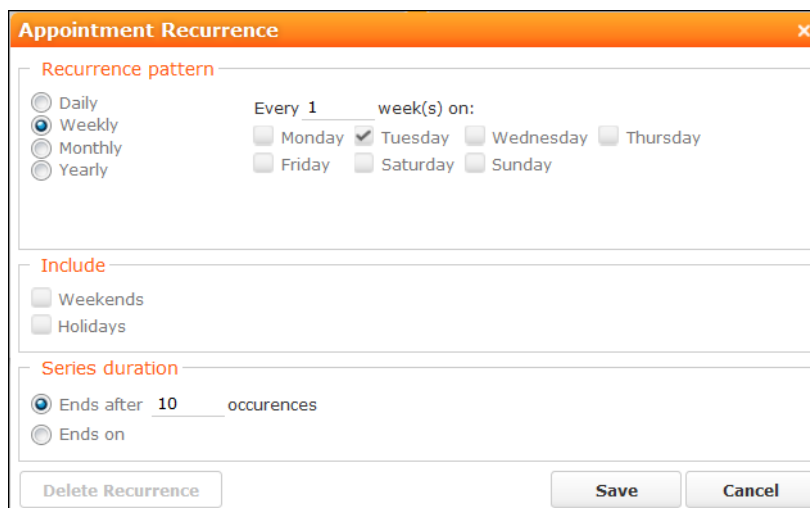
Recurring Activities

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: **Response 1-5 (Marketing Act.), Starts on, Results, Costs, Status, Survey on, Follow-up on, 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 are 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, see [Adding Recurring Activities](#).

3. Select the desired option and confirm with **OK**.

Displaying the Main Activity of a Series

To display the main activity of a series:

1. Select  (**Collaboration**) > **Activities** to display activities in list view and search for an activity in the series.
2. Select **Main Record in Series** from the context menu. The main activity is displayed.

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 are 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:

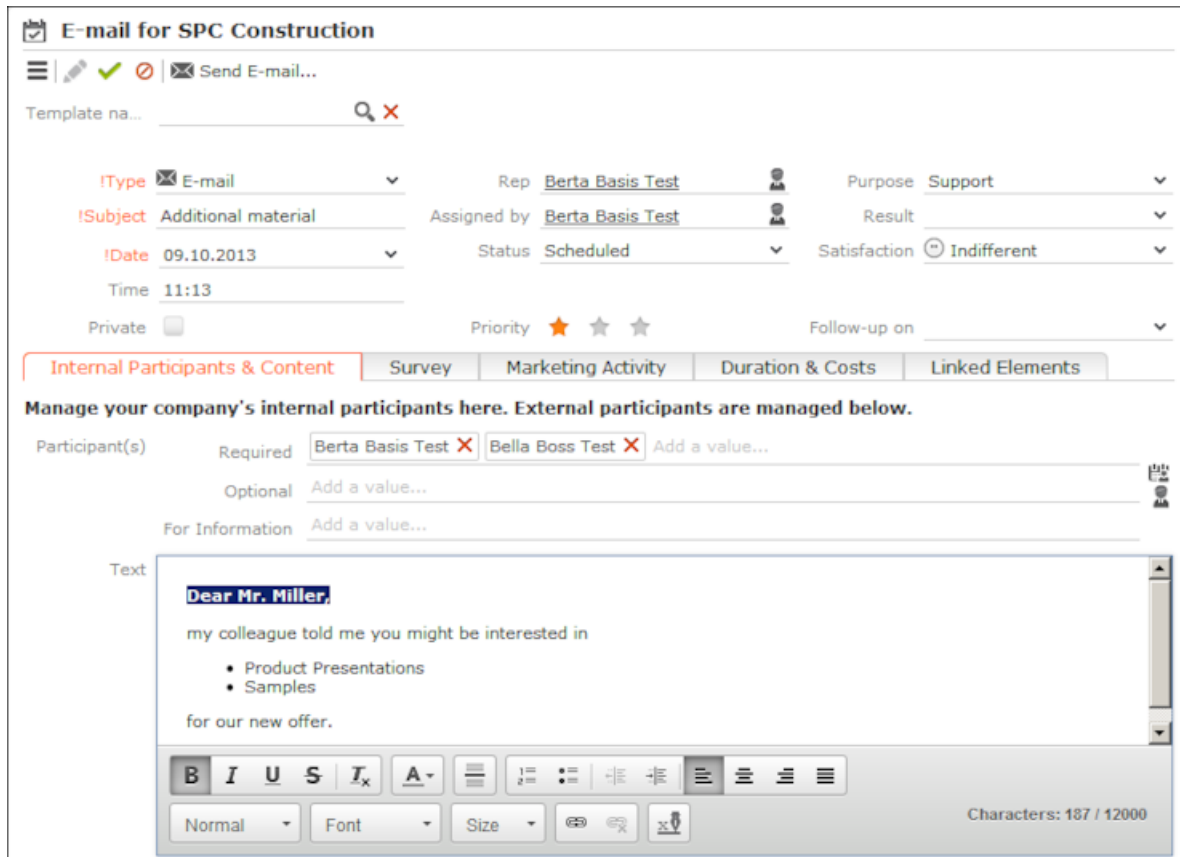
1. Open the activity in the series from which point on you wish to change the recurrence pattern.
2. Click on  (**Recurrence**).
3. Edit the recurrence pattern and click on **Save**. A message is displayed informing you that this activity is part of a series of activities, and you are asked if you wish to use the activity as the main activity of a new series.

Activities and E-mails

Sending E-mails to Participants



To send an e-mail to **all an activity's participants**:



1. Enter the subject of the e-mail in the **Subject** field and the e-mail's text in the **Text** field in the activity.





E-mail for SPC Construction




Send E-mail...

Template na...  

Type  E-mail Rep Berta Basis Test  Purpose Support



Subject Additional material Assigned by Berta Basis Test  Result

Date 09.10.2013 Status Scheduled Satisfaction  Indifferent

Time 11:13 Private Priority    Follow-up on

Internal Participants & Content | Survey | Marketing Activity | Duration & Costs | Linked Elements

Manage your company's internal participants here. External participants are managed below.

Participant(s) Required Berta Basis Test  Bella Boss Test  Add a value...

Optional Add a value...

For Information Add a value...

Text

Dear Mr. Miller,

my colleague told me you might be interested in

- Product Presentations
- Samples


for our new offer.

Characters: 187 / 12000

2. Use the buttons in the text editor to format the contents.

- Click on  (**Add Signature**) to add your e-mail signature.

Note: You can change your signature in the settings, see [Changing Your E-mail Signature](#) on page 54.

- Click on  (**Send E-mail**). The reps and external participants are transferred to the **To:** and **Cc:** fields based on their participation status (Required, Optional, For Information).

If your administrator has defined that e-mails are sent from your e-mail client, your e-mail client is opened. E-mails can also be sent directly via the server.

The **Sent** fields in the activity display the number of times the e-mail was sent and the date and time the e-mail was last sent.

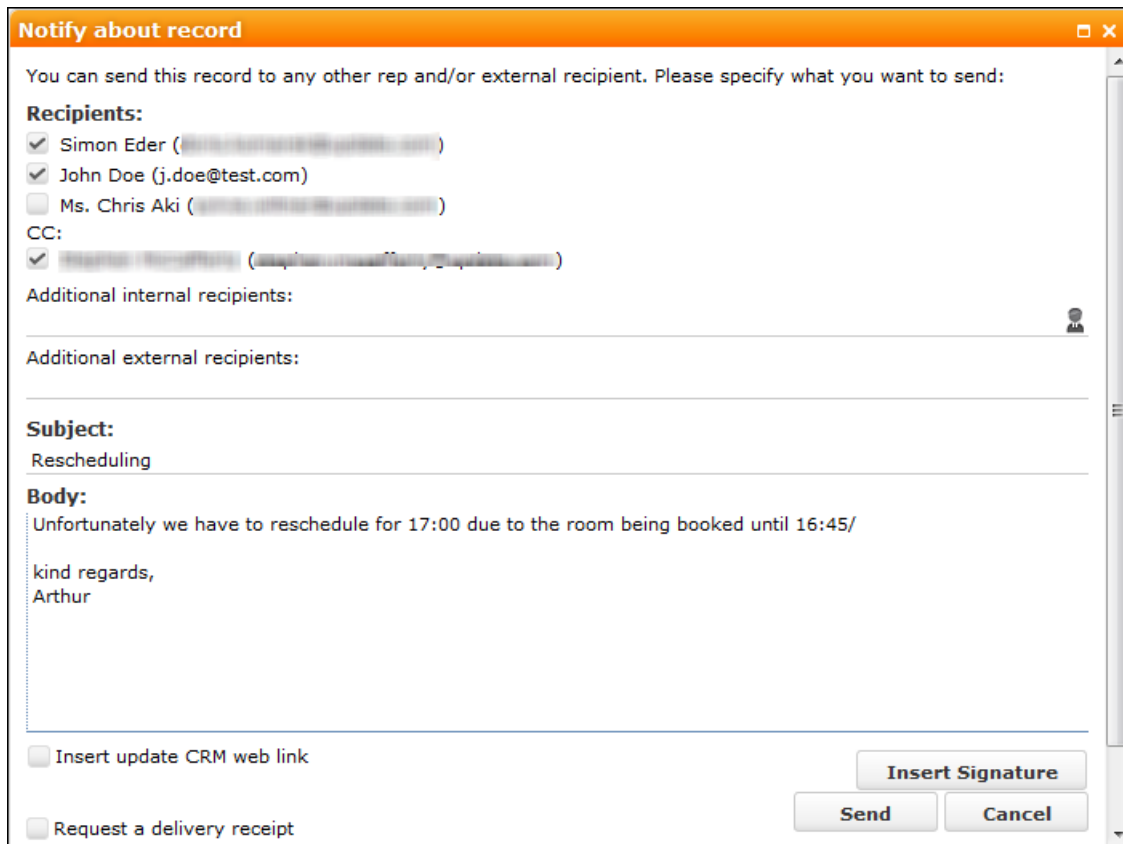
Notifying Reps

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:

- 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 ()
- John Doe (j.doe@test.com)
- Ms. Chris Aki ()

CC:

- ()

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

Insert Signature

Send **Cancel**

- 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.

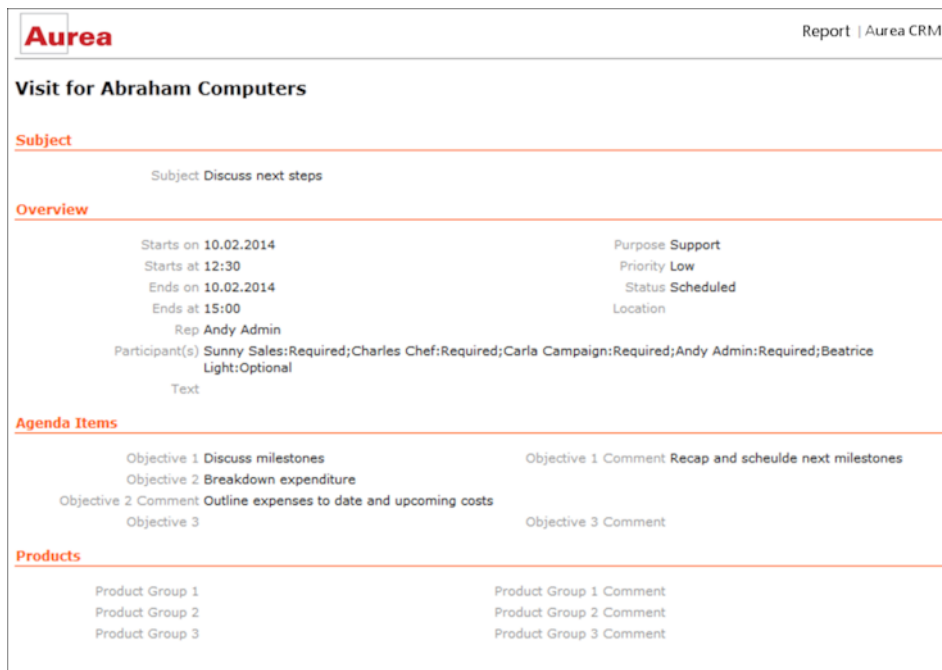
Note: Your administrator can determine that certain types of files or files exceeding a certain size are not sent. When sending e-mails from your e-mail client, no attachments can be added.

8. Click on **Send** to send the e-mail.

Printing Activities

To print out an overview of the most important information concerning your activities:

1. Click on  (**Print**). A print preview is displayed.



The screenshot shows a print preview of a CRM activity. At the top left is the Aurea logo, and at the top right is the text 'Report | Aurea CRM'. The main title is 'Visit for Abraham Computers'. Below this, there are several sections separated by horizontal lines:

- Subject:** Subject Discuss next steps
- Overview:** A table of activity details:

Starts on 10.02.2014	Purpose Support
Starts at 12:30	Priority Low
Ends on 10.02.2014	Status Scheduled
Ends at 15:00	Location
Rep Andy Admin	
Participant(s) Sunny Sales:Required;Charles Chef:Required;Carla Campaign:Required;Andy Admin:Required;Beatrice Light:Optional	
Text	
- Agenda Items:** A list of objectives and comments:

Objective 1 Discuss milestones	Objective 1 Comment Recap and scheulde next milestones
Objective 2 Breakdown expenditure	
Objective 2 Comment Outline expenses to date and upcoming costs	
Objective 3	Objective 3 Comment
- Products:** A list of product groups and comments:

Product Group 1	Product Group 1 Comment
Product Group 2	Product Group 2 Comment
Product Group 3	Product Group 3 Comment

2. Use the print function in your browser.

Tasks

You can add tasks as follows:


- In the calendar, see [Adding Appointments](#).
- From outside the calendar, see [Adding Tasks](#).

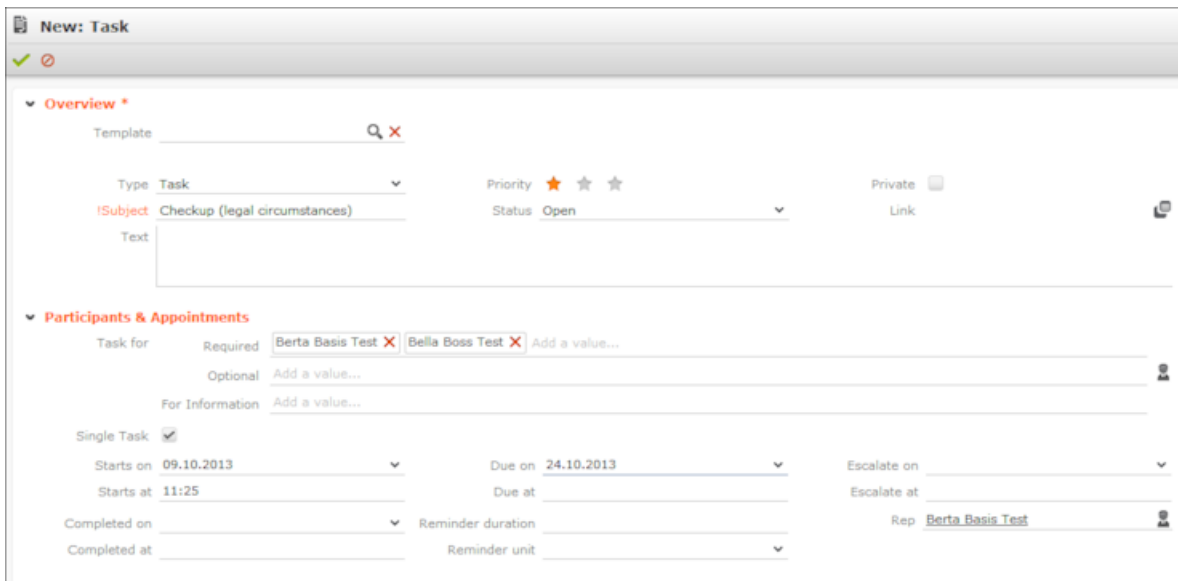
In order to organize complex tasks, you can:

- Add tasks for yourself or for (several) other reps.
- Display tasks as projects, and divide them into sub-projects, see [Task Hierarchy](#).
- Enter a date and time in the **Escalate on** and **Escalate at** fields to create an escalation records if all required participants have not accepted the invitation prior to the tasks' start
- Reschedule tasks, in which case the reps entered in the task receive appropriate messages.

Adding Tasks

To add a new task:

1. Select  (**Collaboration**) > **Tasks**. You can also add tasks from the **Tasks** node in the person/company tree view.
2. Click on **+** (**New**).



New: Task

✓ ✕

Overview *

Template ✕

Type **Task** Priority **★ ★ ★** Private

Subject **Checkout (legal circumstances)** Status **Open** Link

Text

Participants & Appointments

Task for **Required** **Berta Basis Test** ✕ **Bella Boss Test** ✕

Optional

For Information

Single Task

Starts on **09.10.2013** Due on **24.10.2013** Escalate on

Starts at **11:25** Due at Escalate at

Completed on Reminder duration Rep **Berta Basis Test**

Completed at Reminder unit



3. You can select a task template from the **Template** field, see [Task Templates](#). The values entered in the template are automatically transferred to the fields in the new task.
4. Enter a **Subject** for the task.
5. You can add participants to the task, see [Adding Internal Participants](#).

6. If you enter multiple participants, all participants need to set the status of the task to "Completed" before the task is set to completed. Enable the **Single Task** check box to determine that only one of the participants needs to set the status to "Completed" for the task to be set to "Completed".
7. Save the record.

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.

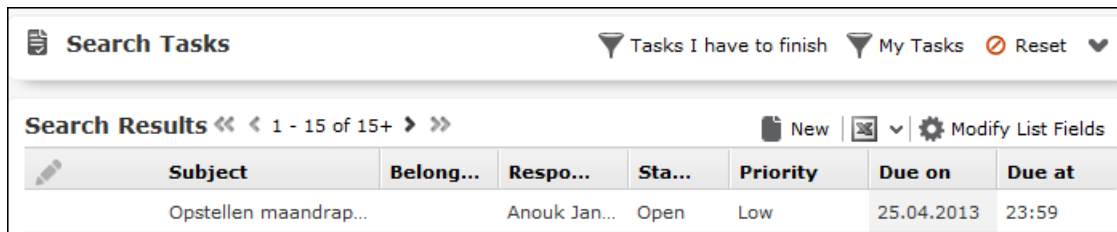
To add a task template:

1. Select  (**Collaboration**) > **Task Templates**.
2. Click on  (**New**).
3. Enter the data.
4. Save the record.

Filtering Tasks

You can restrict the task search to those tasks assigned to you or to your open tasks:

1. Select  (**Collaboration**) > **Tasks**.

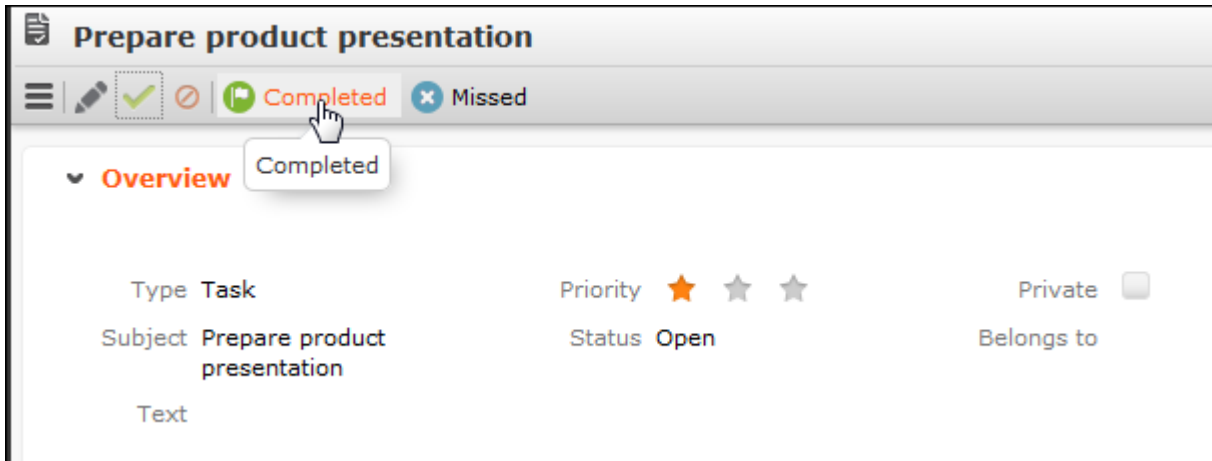


Search Tasks						
		Tasks I have to finish		My Tasks		Reset
Search Results << < 1 - 15 of 15+ > >>						
		New				Modify List Fields
Subject	Belong...	Respo...	Sta...	Priority	Due on	Due at
Opstellen maandrap...		Anouk Jan...	Open	Low	25.04.2013	23:59

2. Select **My Tasks** to restrict the view to only those tasks where you have been entered as the task's rep.
3. Select **Tasks I have to finish** to restrict the view to only those tasks where you have been entered as the task's rep and that are still open.
4. Click on **Reset** to remove the current filter and display all tasks.

Changing the Status of a Task

Click on **Completed** or **Missed** in the header to set the status of a task:



Task Hierarchy

You can create a hierarchy of tasks to depict complex structures for projects. To structure a project with sub-tasks:

1. Add a new sub-task to a task on the **Sub-Tasks** tab under **Related Data**.
2. Save the sub-task and select **Hierarchy Tree** from the context menu.
3. You can use the hierarchy tree to navigate between records in the project, add additional records from the context menu and edit sub-tasks.

Absences


Learn how to manage absences.

You can add absences as follows:

- In the calendar, see [Adding Appointments](#).
- From outside the calendar, see [Adding Absences](#) below.

Adding Absences

To add an absence:

1. Select  (**Collaboration**) > **Absences**.
2. Click on **Start Search** and then on **(+)** (**New**).

The screenshot shows the "New: Absences" form. It has a title bar with a document icon and the text "New: Absences". Below the title bar is a navigation bar with a checkmark icon. The main content area contains the following fields:



- !Starts on: 21.06.2013 (dropdown arrow)
- !Starts at: 08:00
- !Ends on: 12.07.2013 (dropdown arrow)
- !Ends at: 19:00
- !Subject: Summer holidays
- !Reason: Holiday (dropdown arrow)
- !Rep: Bella Boss (with user icon)
- Rep Group

3. Enter the start and end time, a comment and the reason for the absence. These fields are all mandatory.
4. Save the record.
5. You can enter a deputy for the absence on the **Deputy** tab.

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. Select  (**Collaboration**) > **Daily & Weekly Planning**. Or 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.

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 instead of persons, select **Company** from the drop-down list in the header.



Note: By default, you can search for companies and 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 & Weekly Planning'. At the top, there are tabs for 'Daily & Weekly Planning' and 'Contact Person Mr. Andrea Gabrieli'. A search bar is visible on the right. Below the tabs is a 'Search Persons' section with input fields for 'Name', 'Department', 'Rep ID', and 'Company'. A 'Start Search' button is located at the bottom right of this section.

The 'Search Results' section shows a table with the following data:

Last Name	First Name	Function	Department	Area Code	Tel 1	Company	E-mail 1
Aaron	Jonne				123456	Krist OY	
Aki	Chris					AkiComp	
	Sandra					update softwar...	
	Ilona					update softwar...	
Doe	John					update softwar...	j.doe@test.com

Below the search results is a calendar view for the week of 07.01 - 11.01.2013. The calendar shows a grid of days with various activities scheduled. The activities are represented by colored blocks with icons and text. For example, on Monday, there is a 'Project' activity at 10:00 and a 'Gewo' activity at 11:00. On Tuesday, there is a 'Biathlonverb...' activity at 09:00 and a 'Prepare Product Launch (Project)' activity at 14:00. On Wednesday, there is a 'Biathlonverb...' activity at 10:00 and 'Estimate costs' and 'Create documents (Sub-Project)' activities at 15:00. On Thursday, there is an 'AW: (Gewo)' activity at 12:00 and 'Create marketing brochures (Sub-Project)' and 'Create sales documents (Sub-Project)' activities at 16:00. On Friday, there is a 'Zoll anrufen' activity at 13:00.

On the left side of the calendar, there is a 'Today' section showing 'Today: Mon 28 Jan, 2013' and an 'Activity Defaults' section with fields for 'Activity T...', 'Subject', 'Duration', 'Unit', and 'Purpose'.


5. Drag the desired company or person to the desired time slot in the calendar to add an activity.

If contact times have been defined for the company or person (>> [Contact Times](#) on page 356), these times are colored white in the calendar.

The activity is added with the activity default values you have defined (the default duration is one hour).

If no subject is defined in the activity defaults, the activity type, name of the person and name of the company are entered in the subject.

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 284.
7. Click on  (**Calendar**) to switch to the calendar.

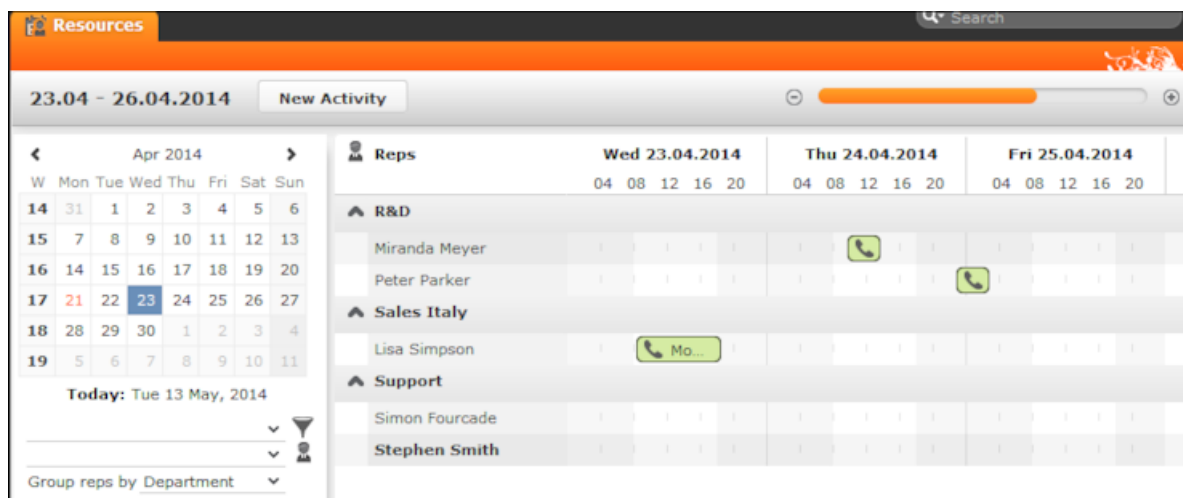
Resources

The resource view allows you to view the workload of reps.

This makes planning activities (especially internal meetings) much easier. Reps' absences (holidays and sick leave) are also displayed here.

To open the resource view:

1. Select  (**Collaboration**) > **Resources**.



The current date and time is indicated by a vertical line. Holidays are color-coded. You can customize the resource view, see [Daily and Weekly Planning](#) on page 302. You can edit the displayed activities and absences and add new ones, see [Editing Activities and Absences](#).

Customizing the Resource View

You can customize the resource view as follows:

- Display the sidebar if it is currently hidden by clicking on the arrow:



- 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 or by clicking on the + and minus icons:



- Click on the header and drag it left or right to scroll:



Reps	Thu 01.05.2014					Fri 02.05.2014				
	04	08	12	16	20	04	08	12	16	20
Stephen Smith										

- Select filters from the drop-down lists in the sidebar to determine which reps/appointments are displayed. You can define your own filters, see [Filtering Appointments](#) on page 287.

Note: At most 50 reps and 5,000 activities can be displayed. If your filters return more reps or activities, a message is displayed informing you that not all records can be displayed. Either refine your filter criteria or display a shorter time period.

- Select one or more reps displayed in the view (hold down Ctrl) and select **Remove Rep** from the context menu to remove the rep(s) from the view.
- You can select additional criteria used to group reps from the **Group reps by** drop-down list, e.g. **Department** (**Org. Group ID** field in the rep record), **Country** or **Skill** or **No grouping**.

Note: Reps of the type "Resource" are displayed within a group at the end of the group's entries.


- Click in the **Reps** column in the header to sort the reps displayed in the resource view.
- Click on  (**Edit Settings**):
 - Select the **Color Coding** criteria used to color activities. Click on  (**Legend**) to display an overview of the color-coding in the calendar.
 - Determine whether you wish to **Show working hours only**.
 - Enable the **Show group column** option to display reps' groups in a separate column.
 - Enable the **Show hidden items** option to include those appointments whose duration is less than the minimum duration for the selected view. These appointments are only displayed for reference and cannot be edited in the resource view.

Reps		CW 18/Apr 2014						
		28	29	30	1	2	3	4
^ R&D								
Miranda Meyer								
Peter Parker								
^ Sales Italy								
Lisa Simpson				⊗	○			
^ Support								
Simon Fourcade								
Stephen Smith								

Note: The time period, reps and grouping options are stored and applied again the next time you open the resource view (including if you log off in the meantime).

Editing Activities and Absences

You can edit the activities and absences displayed as follows:

- Use the mouse to move activities or absences to a different time.
- Drag the left or right borders of an appointment to change its duration.
- Activities are displayed with a solid frame in the row of the organizer: . You can drag these activities to another rep using the mouse.

Note: You cannot assign an absence to a different rep.

- To delete an appointment, click on the appointment to select it and press Delete on your keyboard.
- Double-click on an appointment to open and edit it.
- Click on **New Activity** to add an activity for yourself, another rep at your company or any participants you wish.
- Use the context menu next to a rep in the list to remove a rep from the list (**Remove Rep**), or to add a **New Activity** or **New Absence** for the rep.
- Hold down Ctrl while clicking to select multiple reps - you can then use the context menu to select an option that is applied to all reps. You cannot however add absences for multiple reps.

Visit Planning


You can schedule customer visits for yourself or other reps in Aurea CRM web, helping you optimize your working week.

You can generate automatic suggestions for routes, edit the suggested route and then automatically generate activities for the stops on your route. When generating a route, the system takes into account your work hours and the location (geo-coordinates) and contact times of your customers. Existing appointments, absences, public holidays (defined in the calendar), visit durations (default: 60 minutes), breaks between visits (default: 15 minutes) are all taken into account. You can also take other criteria such as open work orders, the customer's ABC classification, the ratio of actual visits to target visits etc. into account when planning routes.

You can also plan routes manually without suggestions by adding customers to a route. Routes you have planned manually can be optimized by Aurea CRM web.

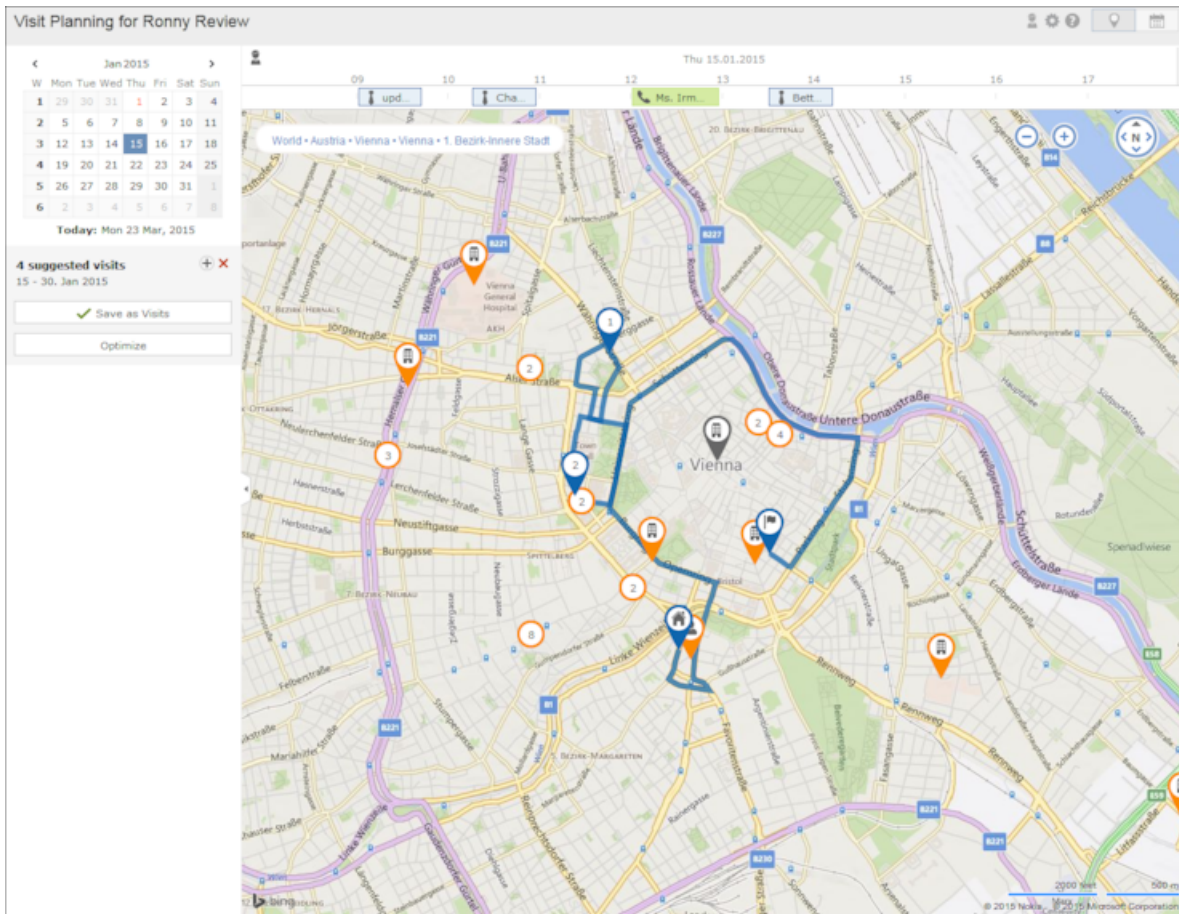
Routes can be planned for a single day or over several days. Only the stops on the route on the day selected in the calendar are displayed. If you edit a route (e.g. add customers or activities), the route is recalculated automatically.

Note: Your administrator needs to define geo-coordinates for reps, customers etc. and reps' work hours and customers' contact times are only taken into account if they are stored in Aurea CRM web. If no contact times have been entered for a customer, activities are generated during the rep's work hours. Saturdays and Sundays are ignored when planning routes unless work hours have been defined on these days for the specific rep. If no individual work hours have been entered for the rep, the general work hours defined by your administrator are used.

Select  (**Collaboration**) > **Visit Planning** or select **Visit Planning** from a company or person's context menu to open the visit planning area.

Note: If you open the visit planning area from a company/person, only that customer's activities are displayed on suggestions are only made for that customer. When opening the visit planning area, only those activities and suggestions are displayed for the date selected in the calendar. If more than one activity and/or suggestion exists, the corresponding route is displayed when opening the area.


The visit planning area is divided into several areas:






Map

- The location of your customers on the map are color-coded:


- Orange: The location of your customers ( companies and  persons).



- Orange circle with number (): Indicates several companies are display at a single location as there is not enough room to display them all on the map. The number indicates the number of companies at the location. Zoom in to display the customers' individual locations.

Click on the orange circle to display a list of all customers at that location.




- Blue ( ,  , ): Visits that are part of the route (either existing appointments in your calendar or suggestions). The number indicates the order in which customers are visited. The house icon indicates the start of the route and the flag the end.

Activities and suggestions are only displayed for the date selected in the calendar.



- Violet (): Customers originally suggested in the route, but that you have manually removed from the route.

- Gray (.
- Click on a pin or a customer in the list if multiple customers are grouped at the same location. Information on the customer and the activity/suggestion is displayed below the mini calendar. The activity/suggestion is highlighted in the timeline (if it exists).
- Click on a location on the map or click on  (**Show Menu**) in the list of customers at a location to open the context menu. Select **Add to Route** or **Remove from Route** to add the customer to the route or remove them from it. Select **Edit** to edit the corresponding visit suggestion.

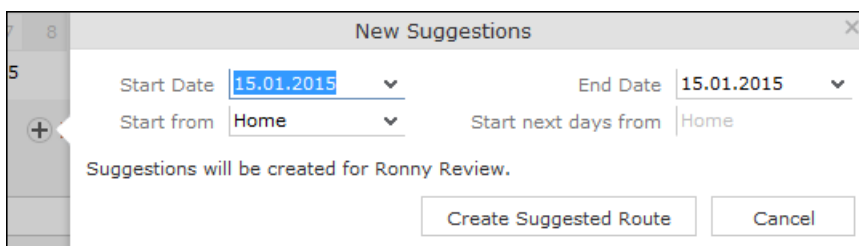
Note: If you add a customer to a route or remove a customer, the start and end time of existing suggestions are not updated. Click on **Optimize** to recalculate the route.

- Messages, e.g. concerning long idle times, exceeded travel times, conflicting appointments and appointments outside of work hours or on holidays are displayed and highlighted with an icon according to severity ( (information),  (warning),  (error)). These messages are either displayed on the route between two locations, or at the starting location if the message applies to the starting location. Click on an icon to display the message. The record the message applies to is highlighted in the timeline.

Sidebar

- Use  to display or hide the sidebar.
- Select a date in the mini calendar to display the route on the selected date or to plan a route on that date.
- To generate visit suggestions:
 1. Click on  (**New Suggestions**) below the calendar.



A window is opened where you can define the settings used to generate the suggested route.



2. Choose where to start the route from (Home, Office, Last Visit) and the start and end date (by default, the start and end date are the same). If the route


spans several days, determine where the route should start from on the subsequent days (Last Visit starts the next day from the location of the last visit on the previous day).



3. Click on **Create Suggested Route**. The route is created (any existing visit suggestions are deleted) and is displayed on the map. You can now edit the route (e.g. add customers).

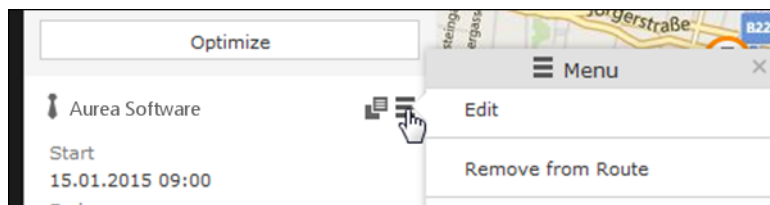
Note: Calculating the route may take a while. By default, the route is created for you. To generate a route for another rep, click on  (**Select Rep**) in the header and select the desired rep. The selected rep is remembered and reused the next time you access the visit planning area. When planning a route for another rep, variable values defined in the corresponding info areas (Z5/Z6) are applied to the current rep, not the rep the route is planned for. If you apply a filter ( (**Settings**) in the header), the filter is taken into account when generating visit suggestions. If you add or reschedule an activity outside of the rep's work hours, the rep's work hours for that day are extended accordingly. Routes can span 31 days at most.

- Click on **Optimize** to optimize the route if you have edited it or added the route manually. The route is recalculated. The order of visits in the route may change. Existing activities and the starting location are not changed.


Note: Calculating the route may take a while. A message is displayed if the route is already optimized or cannot be optimized further.

- Once you are satisfied with the route, click on **Save as Visits**. Activities are automatically generated (type = "Visit") based on the suggestions in the route. If you are planning a route over several days, you can choose whether to generate activities for all the suggestions or only for a specific day.
- Click on  (**Discard all Suggestions**) in the sidebar next to the number of suggested visits. **All** visit suggestions are deleted (not just those on the current day).
- Click on a location on the map or on an activity/suggestion in the timeline to display information on the record in the sidebar.

Move your mouse cursor over the record's header (e.g. the name of the customer) to display the icons used to access the menu () and quick view (). Select **Remove from Route** from the menu to remove the customer from the route.









Timeline

- A timeline is displayed above the map containing suggestions that are currently part of the route (blue) or not part of the route (violet). Existing activities and absences are colored the same as they are in the calendar.
- Visit suggestions are indicated by the 📍 icon in both the timeline and sidebar. Existing activities and absences are indicated using the same icon as in the calendar (e.g. 📍 for a visit).
- Click on an activity or visit suggestion to highlight the customer on the map with a circle beneath the pin ().
- You can reschedule activities and suggestions by dragging them to the desired time in the timeline. Drag the left or right borders to change the start and end time (and the duration).
- Double-click on an activity or visit suggestion to open a popup where you can edit its details.

Header

- The rep the route is being planned for is displayed in the header. By default, routes are created for you.

Click on  (**Select Rep**) to select a different rep. The selected user is stored and selected by default the next time you open the visit planning area.

- Click on  (**Map**) and  (**Calendar**) to switch between the map and calendar view of activities and suggestions. You can edit activities in the calendar view, e.g. move an appointment to reschedule it.
- Click on  (**Legend**) to display the legend.
- Select  (**Settings**) >  (**Filter**) to determine which customers are displayed on the map (e.g. companies, persons) and define filters, >> [Defining General Filters](#). The system remembers which filters are active and applies them again the next time you open the visit planning area. Filters are applied when generating visit suggestions.

Document Management

You can store existing documents in Aurea CRM web's database. Example - a letter that you received from a customer.

You can also create a single letter defined by your administrator which is combined with data in the database in order to send the letter to a customer. You can also generate mass mailings within the scope of marketing activities which include data relating to the target group created for the marketing activity. These documents are also stored in the database.

Documents


Learn to manage documents.

Below are the various actions that can be performed on a document:

Opening and Editing 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.

To edit a document:

1. Search for the document (see above).
2. Select **Check Out & Edit** from the document's context menu.

Note: CRM.launcher is required to check out documents, see [CRM.launcher](#) on page 184.



The document is opened in the associated application (based on the document type). The document is locked for other users.

3. Edit the document.
4. Many document types (e.g. Microsoft Office documents) can be saved automatically. To save the document in the Aurea CRM database, save or close the document in the associated application.

You are asked whether you wish to upload the document. The document is automatically checked in once it has been uploaded, and is thus again available to other users.

Displaying Checked Out Documents

To display the documents you have checked out:

1. Select  (**Collaboration**) > **Checked Out Documents**. The documents that you have checked out are listed.
2. The following entries are available from the document's context menu:
 - Select **Go to Document** click on  (**Select**) next to the **File** field to upload the document manually.
 - **Undo Check Out**

If you log out of Aurea CRM web and you have checked out documents, you are asked whether you want to:




- Cancel logging out in order to upload the document
- Upload the document the next time you use the system. The document remains checked out.
- Undo the check out before logging off.

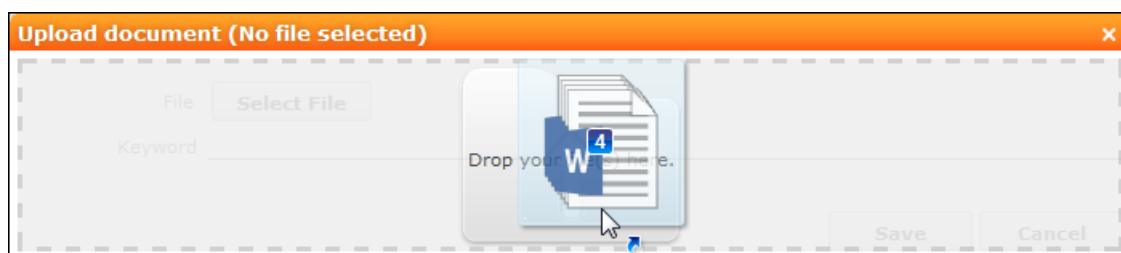
Saving Documents in the Database

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. Select **Open** from the context menu.
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.

Document Fields

Certain info areas allow you to enter documents in document fields.

Document fields offer the following options:

1. Click on **Q (Select / Upload Document)**.
2. Choose one of the following options:
 - **Open document:** Opens the document entered in the field.
 - **Existing Document:** Allows you to enter a document stored in the Aurea CRM database in the field.
 - **Upload Document:** Allows you to upload a document (e.g. from your local hard drive) and store it in the document field.
3. Click on **X (Delete)** to remove the current document from the field.

Letters

You can create letters based on document templates as Word documents from certain records in Aurea CRM web.

Data entered in the record is transferred to your word processor and inserted in the document.

Creating Letters

Your administrator can determine how you can create letters and which templates are available from which info areas.

To create a letter for a person, for example:

1. Select the desired template from the person's context menu or using a predefined button. The current record is transferred to your word processor and merged with the document. The document is automatically linked to the record.
2. The document is opened in Microsoft Word. You can edit the document.
3. Close or save the Word document. The document is uploaded to the Aurea CRM database.

Mail Merges

You can create mail merges within the scope of marketing activities.

Quick campaigns allow you to generate a letter for several persons, without needing to first add a campaign and associated marketing activities etc., see [Quick Campaigns](#) on page 381.

For further details on creating mail merge, see [Marketing Activities](#) on page 383.

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

Learn to create and manage document templates.

Following actions can be performed on document templates:

Using Aurea CRM Addin 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 Add-in 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 ensures 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.

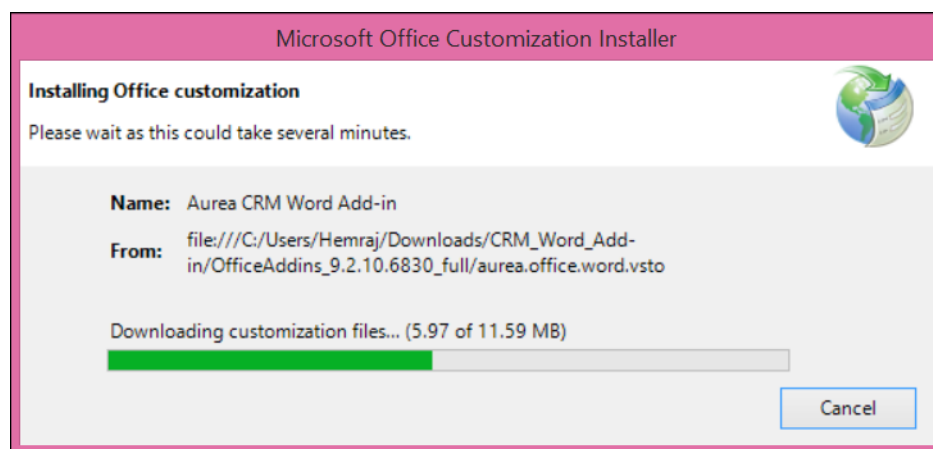
To install the Aurea CRM add-in for Word:

1. Browse to the network shared central location provided by your CRM administrator.

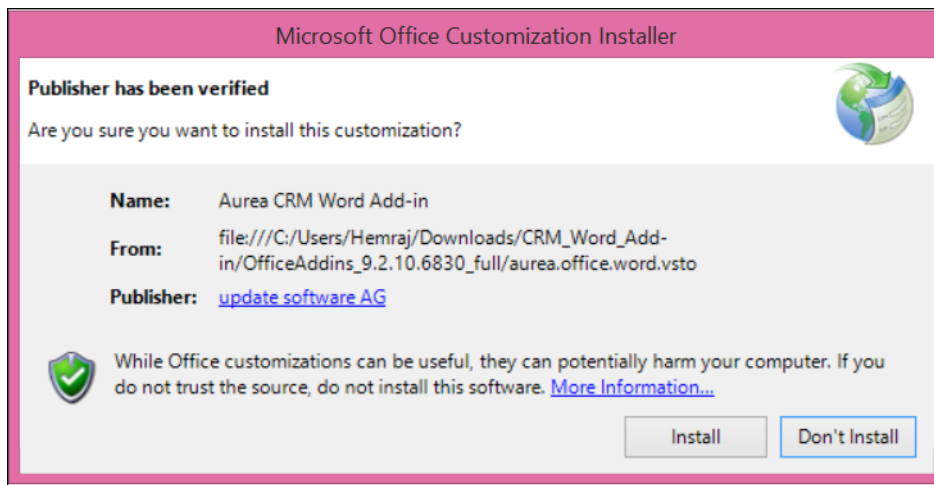
Or

Unzip the package `OfficeAddins_<versionNo>_full.zip`. The `<versionNo>` is the latest version available on the customer support site.

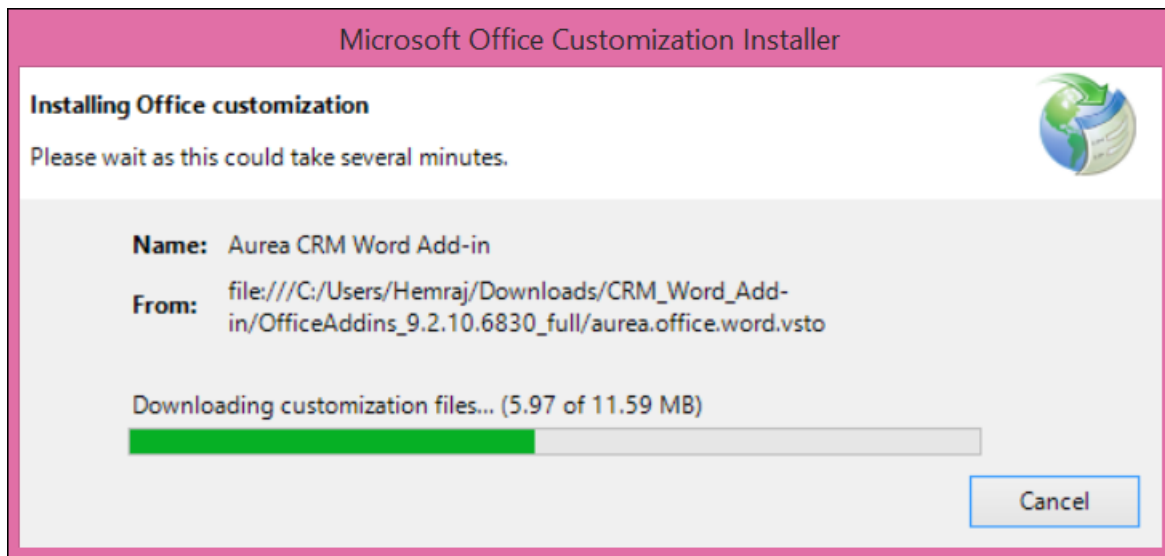
2. Double click `aurea.office.word.vsto` file in the shared location or the unzipped folder. The Microsoft Office Customization Installer window opens.



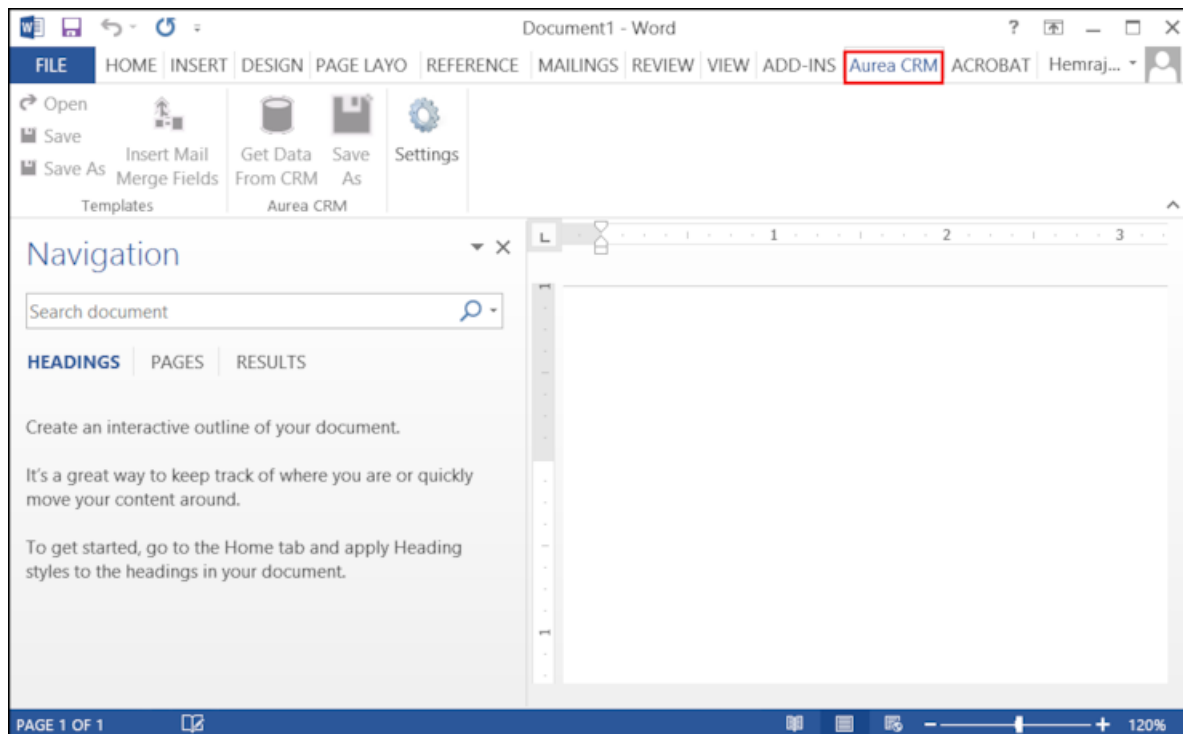
The installer verifies the publisher, in this case Aurea CRM, and then displays the following window.



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:
- a. Enter the URL of the Aurea CRM server.
 - b. If Aurea CRM web is deployed on a RAS server, perform the following steps:
 - a. Click the **Use RAS authentication** checkbox.
 - b. Click **Open RAS Advanced Settings**. The following RAS settings dialog

displays.

- c. Enter the URL for the RAS server and the Application ID of Aurea CRM web instance on the RAS server.
- d. Click **Close RAS advanced settings**.

- c. Enter your **Username** and **Password**.
- d. Select your preferred language.

9. Click **Log In**.

10. Now you can use the CRM Word Add-in to create templates for your documents.

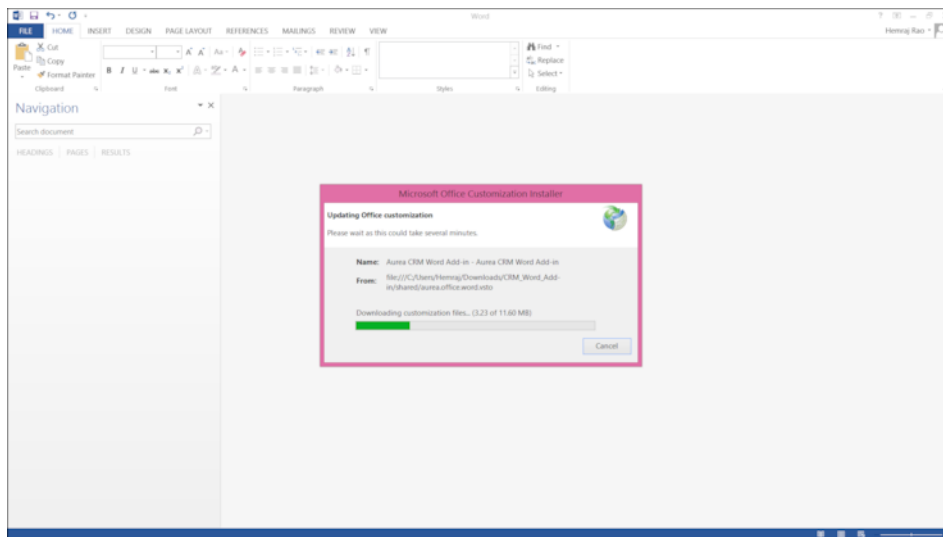
Upgrading the Aurea CRM Add-in for Microsoft Word

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 then happens automatically. Publishing a new version to this location automatically updates the CRM Add-in for Word installed from this location. ClickOnce checks this location once in every seven days for new updates.

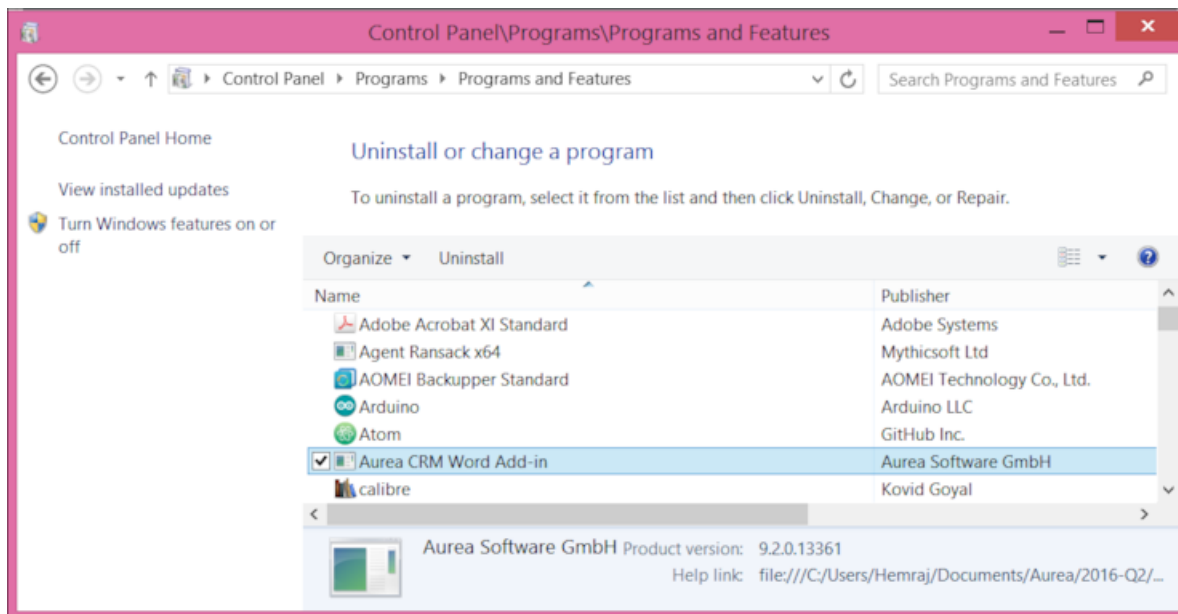
Note: If there are multiple users on your machine, then you have to install your own version of CRM Word Add-in. This is a limitation of the ClickOnce solution.

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 checks 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**.



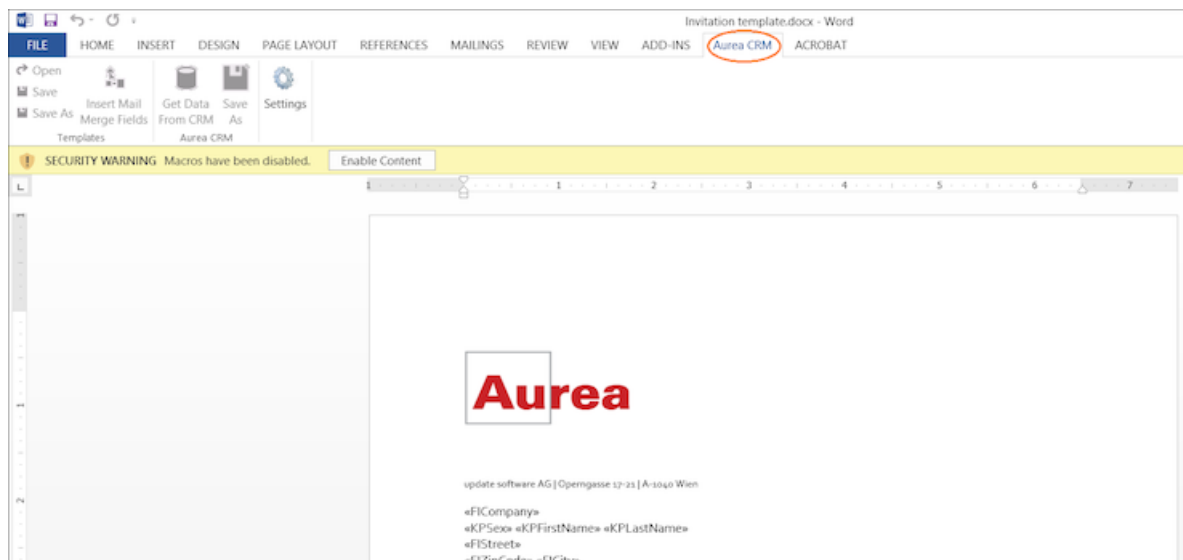
Unzip the package `OfficeAddins_<VersionNo>_release.zip`. The `<VersionNo>` is the latest version available on the customer support site. Follow the installation instructions in [Installing Aurea CRM Add-in for Microsoft Word](#).

Creating and Saving new Document Template

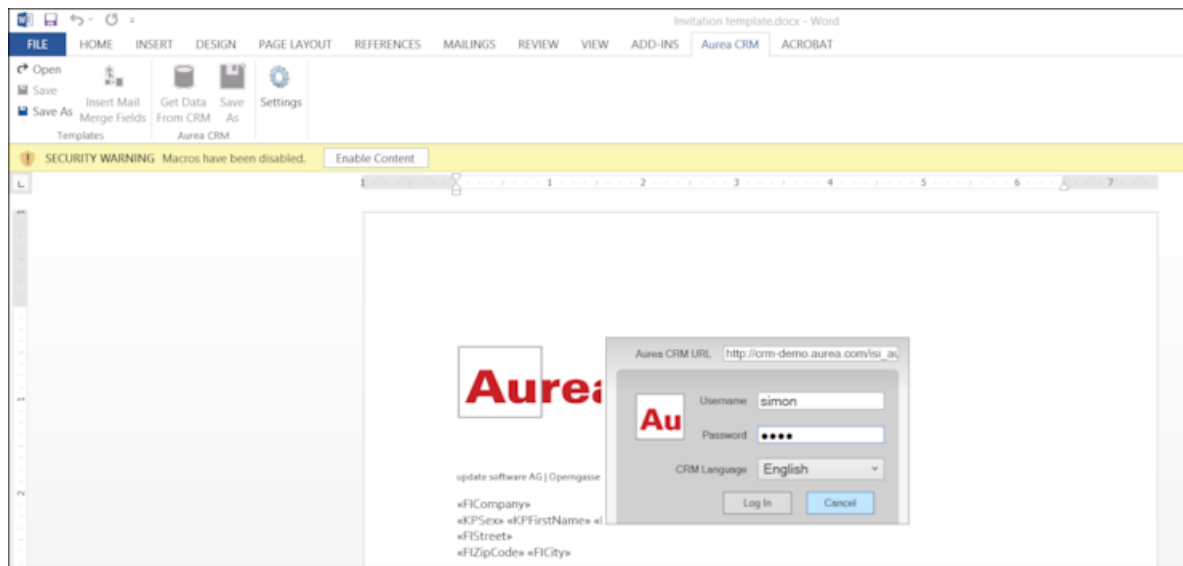
You can create document templates for documents that you regularly use for recurring tasks.

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.



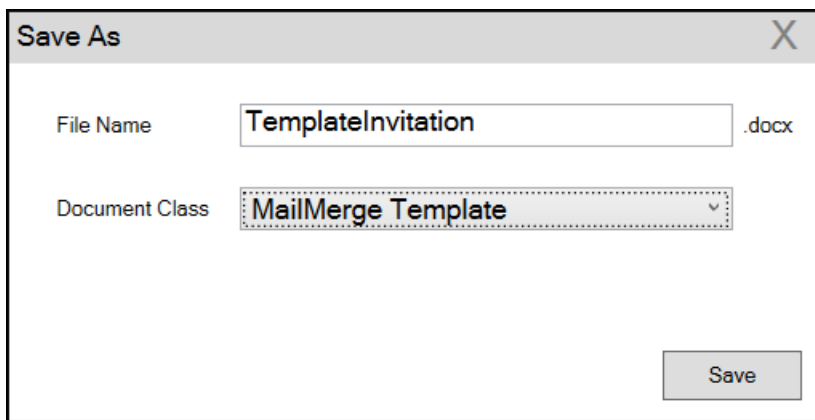
4. Click **Settings** to open the connection dialog.



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.

- Click **Save**. The template document is saved to the D1 infoarea of the Aurea CRM server.

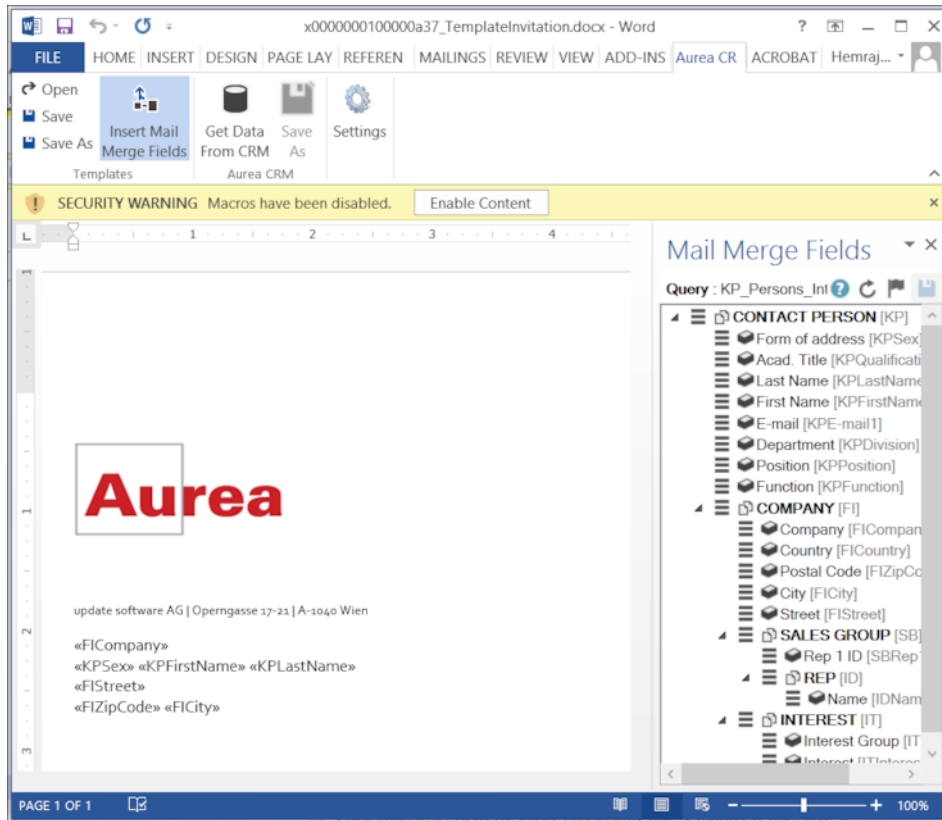
Note: After a template is saved to Aurea CRM, the **Insert Mail Merge Fields** menu item is activated.

- 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:

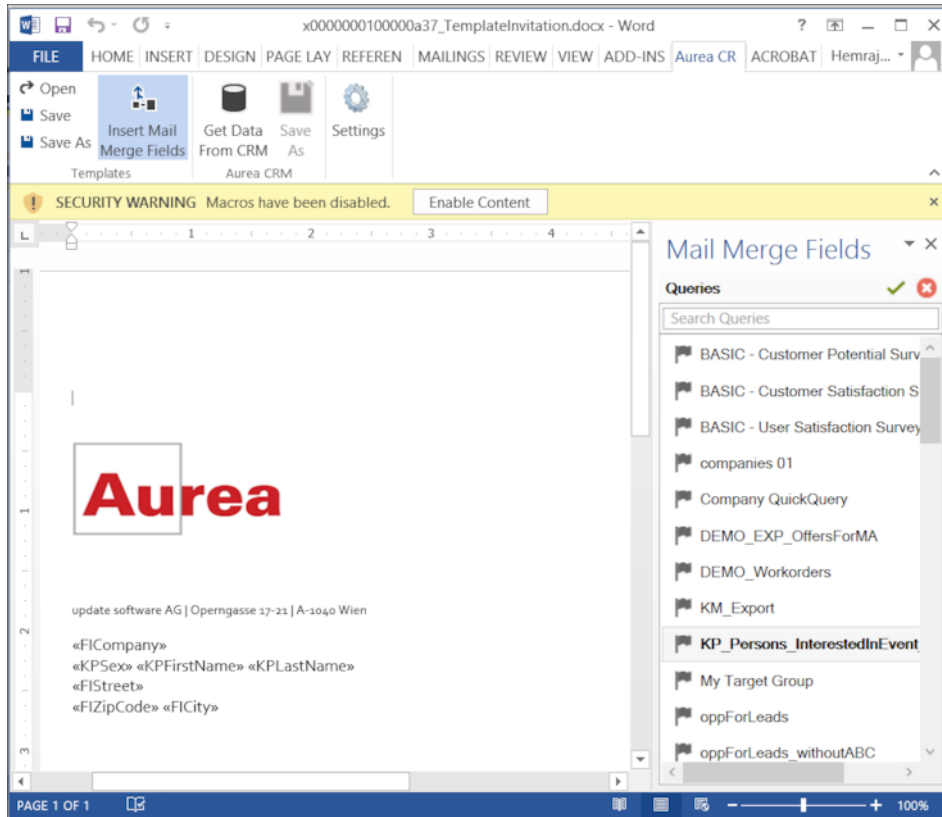
The screenshot shows the 'Search Documents' interface. The search criteria are: Title (empty), Document Class (Add a value...), Erfasser (empty), Read only (?), Keyword (empty), Created on (MM/DD/YYYY), Private (?), and With me (checkbox). The search results table is as follows:

Title	Document Cl...	Keyword	Created by	Created on	Updated on
Offer No 1-216000049-1 - Open_20160727.pdf			Ben Boss	07/27/2016	07/27/2016
revenue_20160715_0621.xml			Simon Seller	07/15/2016	07/15/2016
Projektliste VerkÄufer.pdf			Beatrice Base	07/13/2016	07/13/2016
AureaCRM_Enterprise_Apr_2016_EN.PDF			Paul Project	07/04/2016	07/04/2016
Offre No 1-216000012-1 - Otwórz_20160629.pdf			Simon Seller	06/29/2016	06/29/2016
Offre No 1-2140000273-1 - Otwórz_20160629.pdf			Simon Seller	06/29/2016	06/29/2016
DEMO_Einladung_Event.docx	Template	update.groupware	SU	06/28/2016	07/13/2016
QuickCampaign_bf784a6b-6677-4ee3-a5bf-7b36f784...			Mona Market	06/27/2016	06/27/2016
invitation template.docx	Mail Merge T...	Invitation Templa...	SU	12/02/2015	12/02/2015
photo.jpg			Simon Seller	04/02/2015	04/02/2015

- 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.



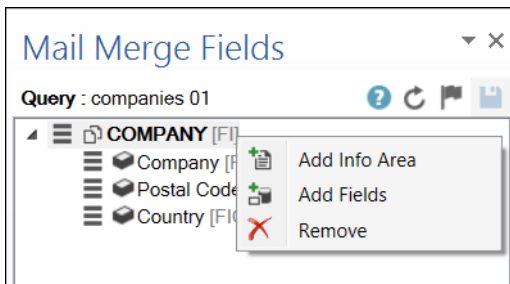
11. You can create a new query by selecting an existing query then modifying, and saving it.

To create a new query, perform the following:

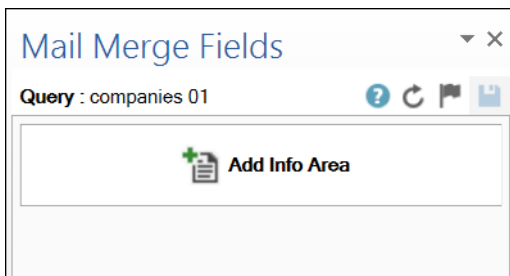
- a. Select any query or record and click . In the following screenshot, typing **com** in the filters text box shows **companies 01**.



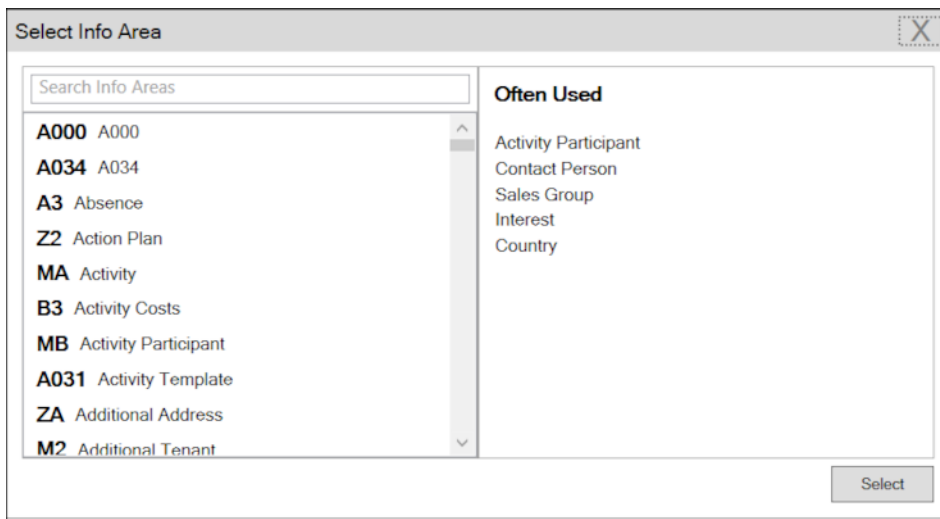
- b. Right click on the root record node and select **Remove**.



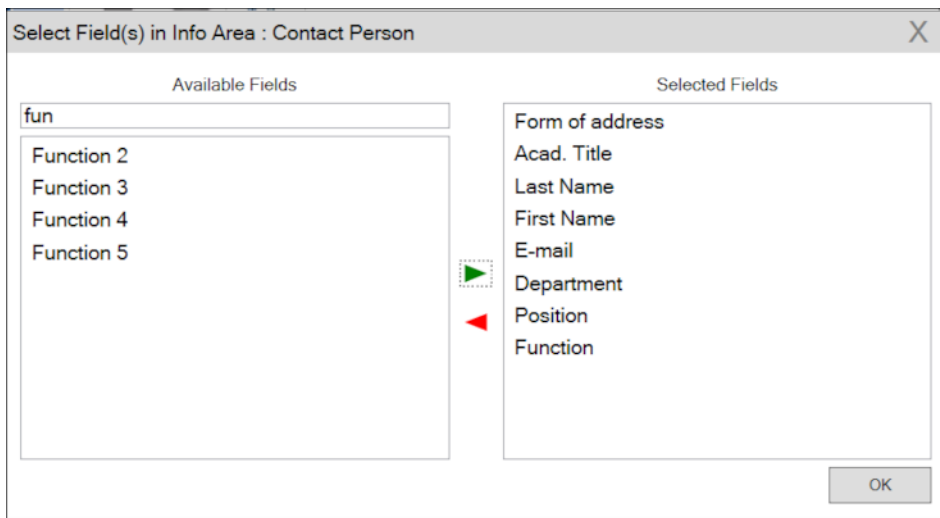
This creates a blank query, as shown in the screenshot below.



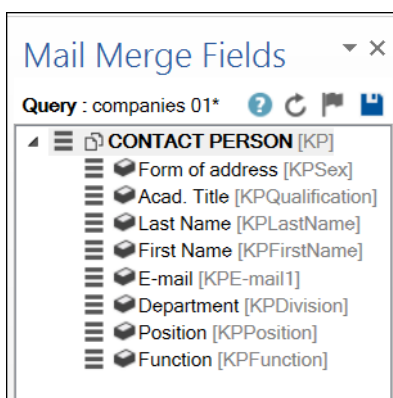
- c. Click **Add Info Area** to open the **Select info Area** dialog.



- 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.



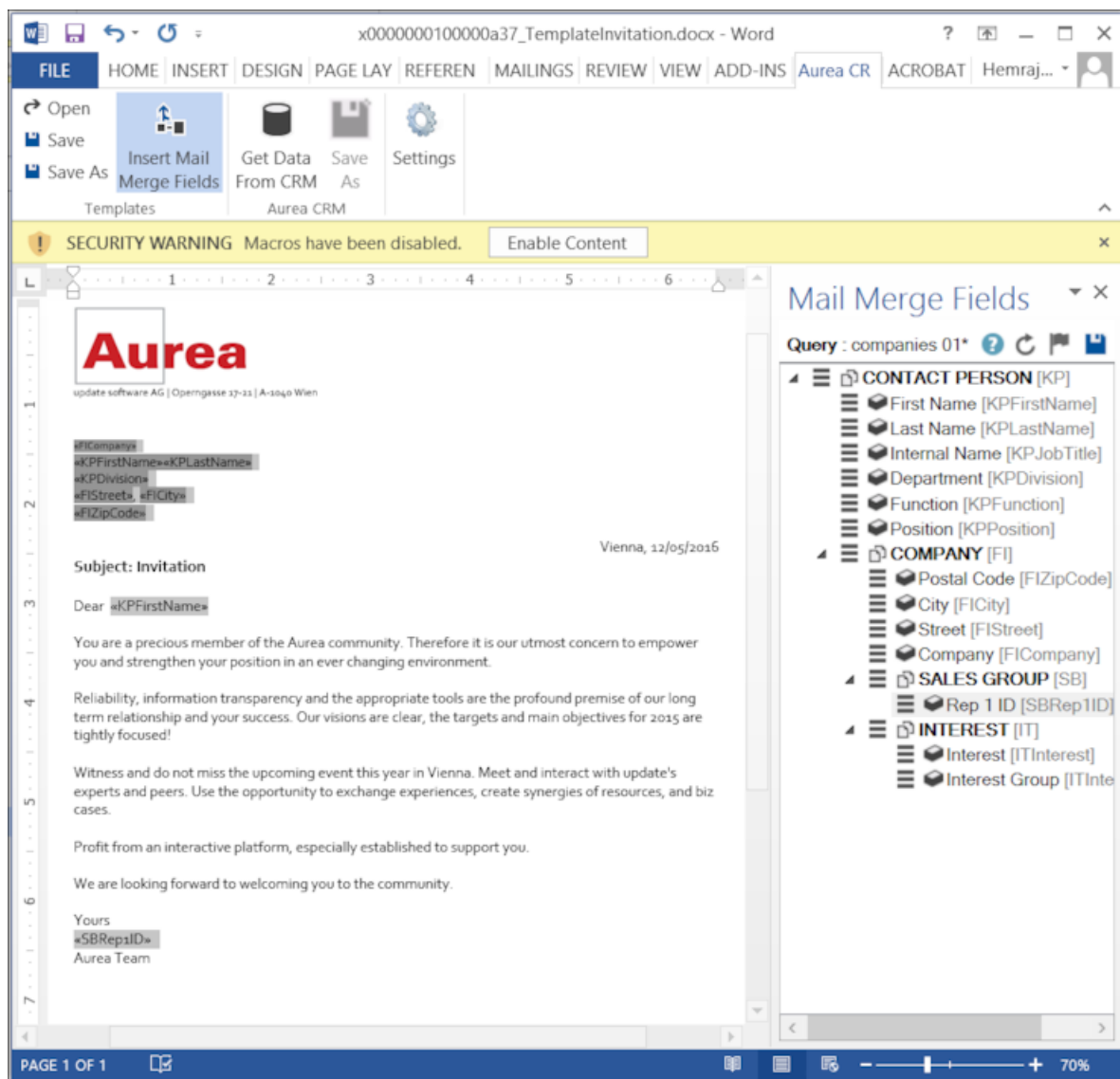
- f. To add more info areas, right click on an infoarea and select **Add Info area**. Selecting the infoarea opens a Relationships dialog. You can define the type of relationship between the existing infoarea and the new one you add.

- 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 overwrites the before selected query and the changes is 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.



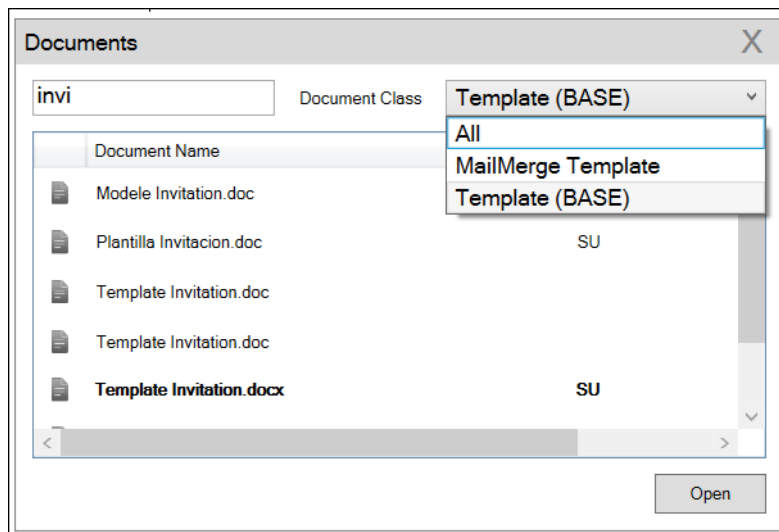
13. Click **Save**. The template document is saved to the D1 infoarea on Aurea CRM server.

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.

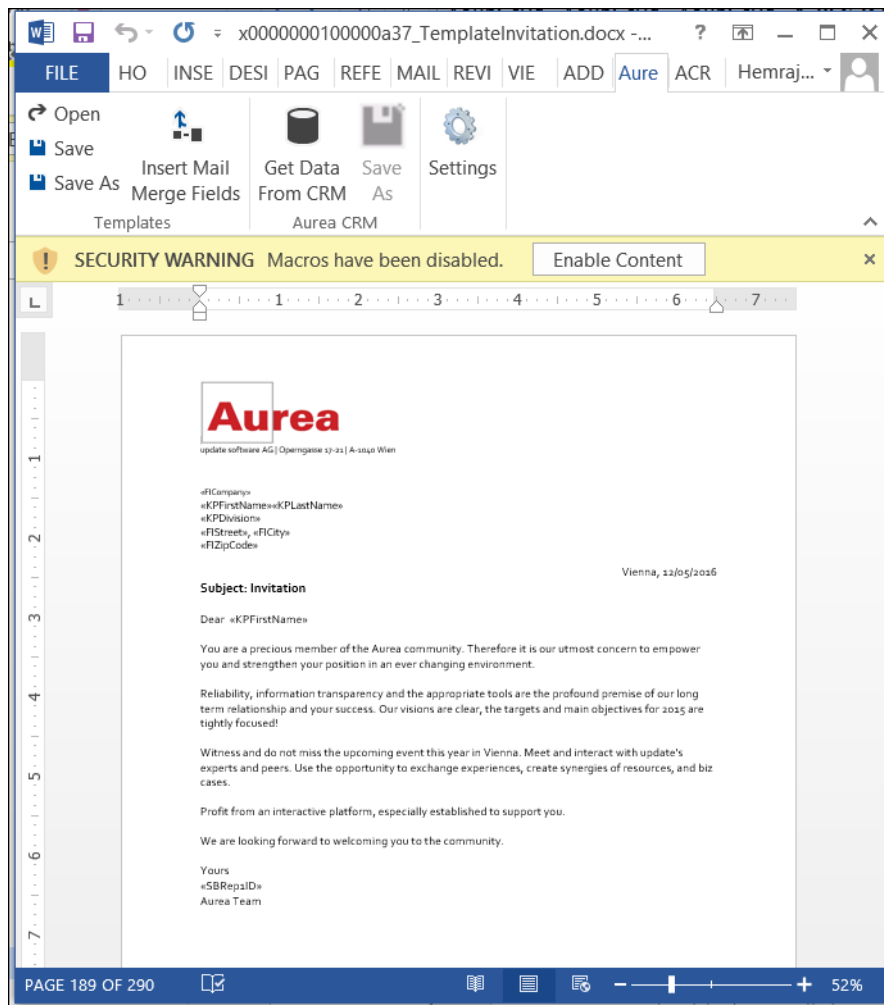
To open an existing template:

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.

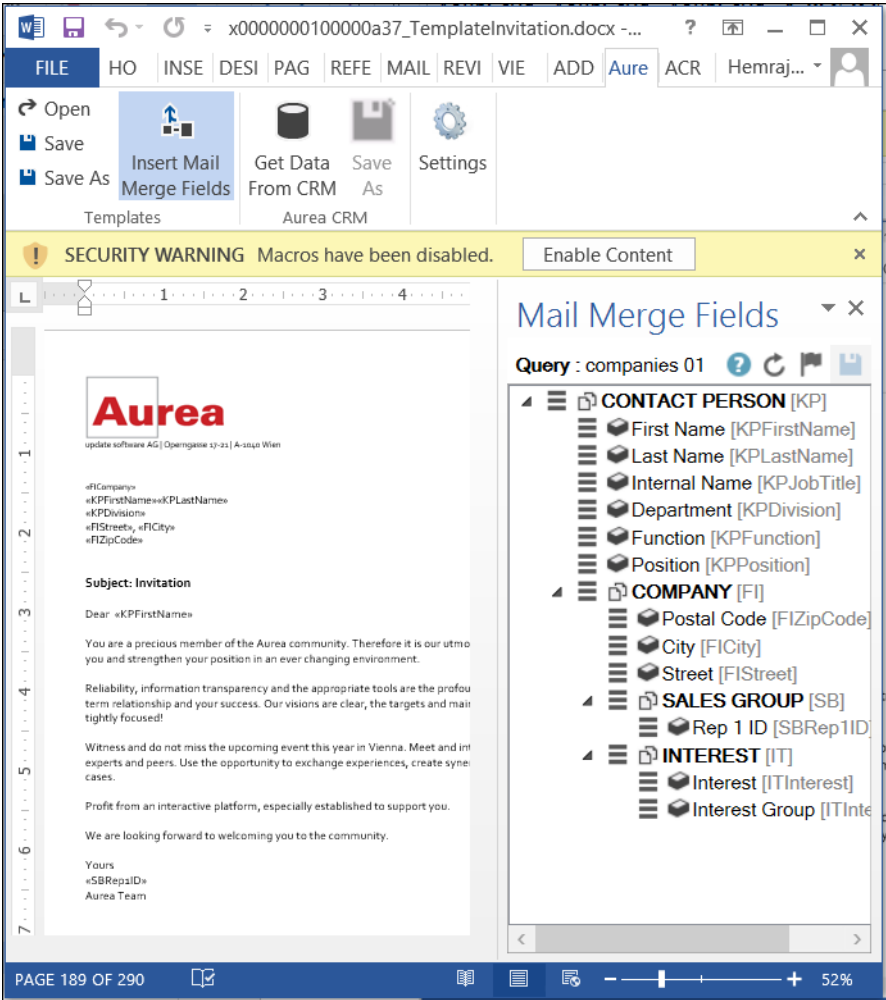


You can type in the text box to filter for a specific document. You can also select the name of the template document. In the screenshot above, **Template (BASE)** was the document class selected and **invi** was typed in the filter text box, to find the **Template Invitation.docx** template.

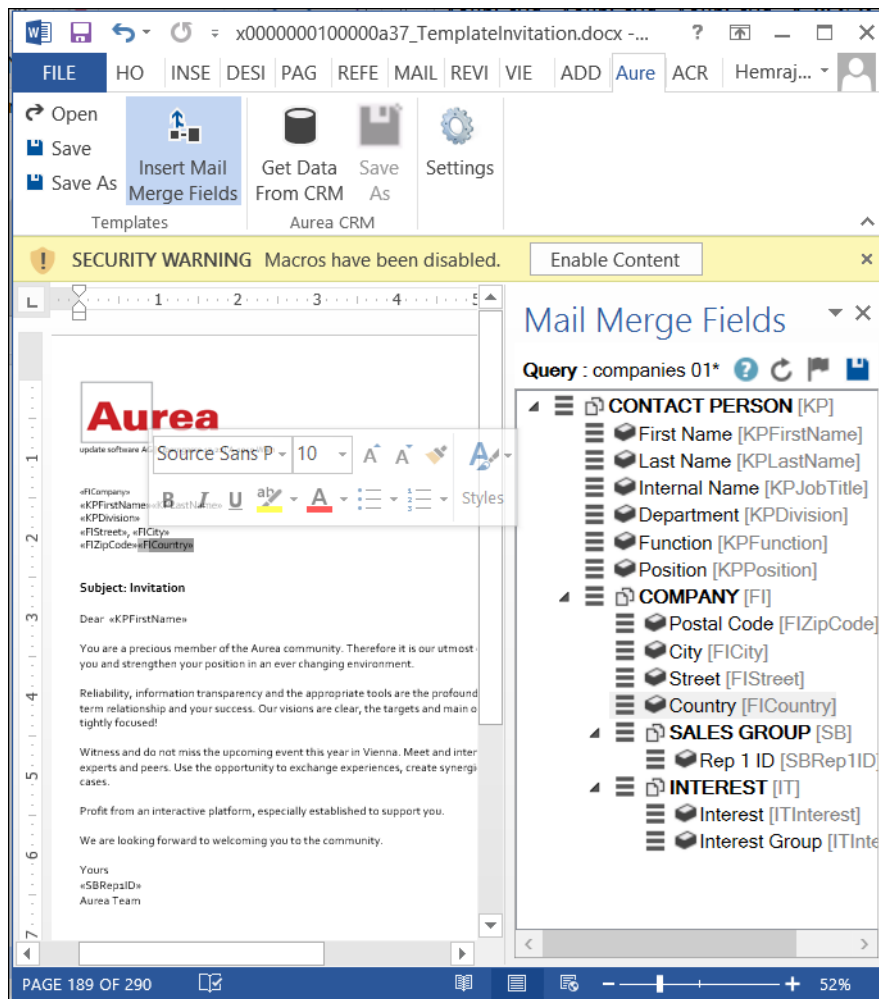
4. The selected template document is retrieved from the Server and loaded into Microsoft Word. For example, the screenshot below shows the **Template Invitation.docx**.



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.



7. 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.

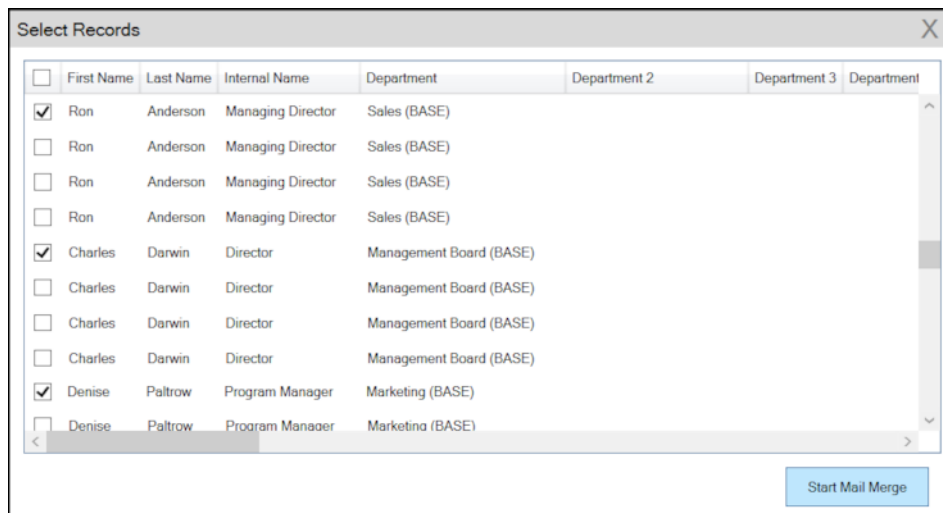


8. Click **Save**. The template document is saved to the D1 area of Aurea CRM.

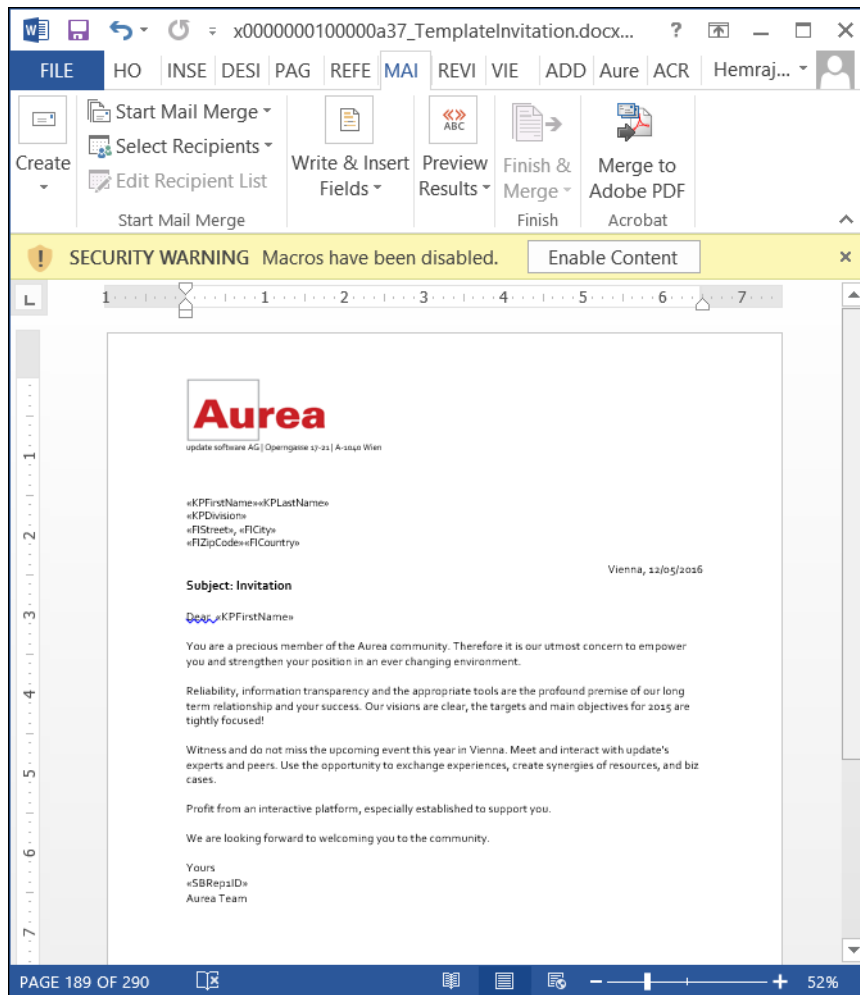
Mail Merge Using Document Templates

To generate a document for several persons using the document template:

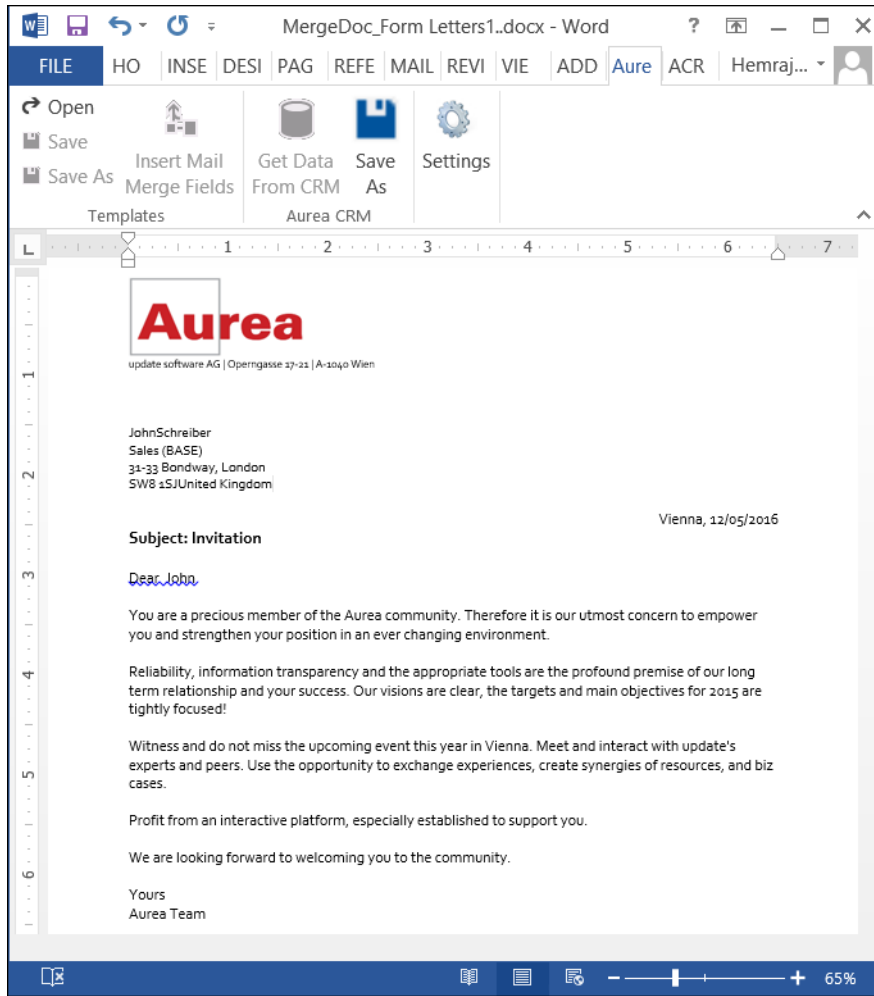
1. From the Aurea CRM menu, login to the CRM server and open the Mail Merge template document. Edit the template document if necessary. For more information, see >> Opening and Editing document templates.
2. Click **Get Data From CRM**. The Select Records dialog displays single record or a list of records, showing the data fields you selected. You can then select the data you want use with the document template.



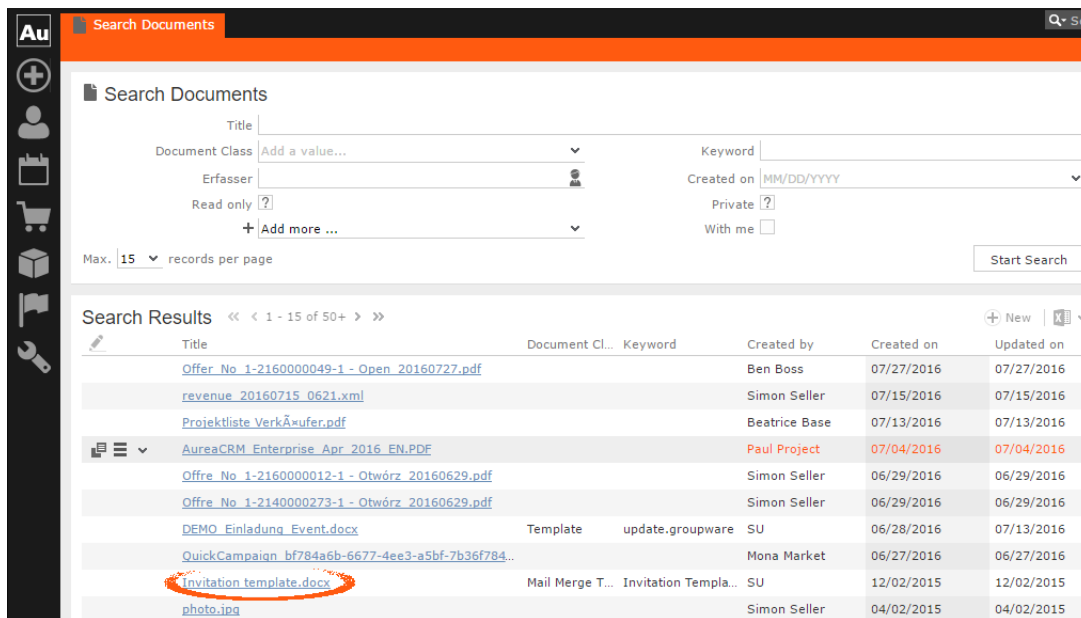
3. Click **Start Mail Merge**. The document is opened in a new Window.



4. 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.

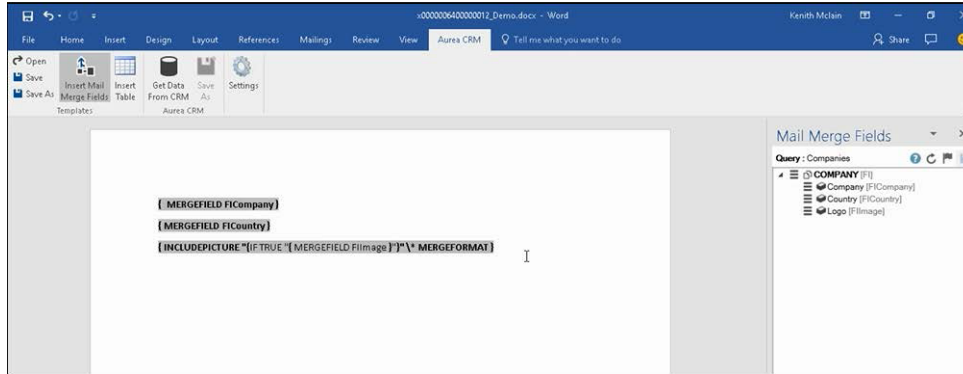


5. You can work with the documents created from the Aurea CRM server. The following screenshot shows the **Invitation template.docx** template document on the CRM server.




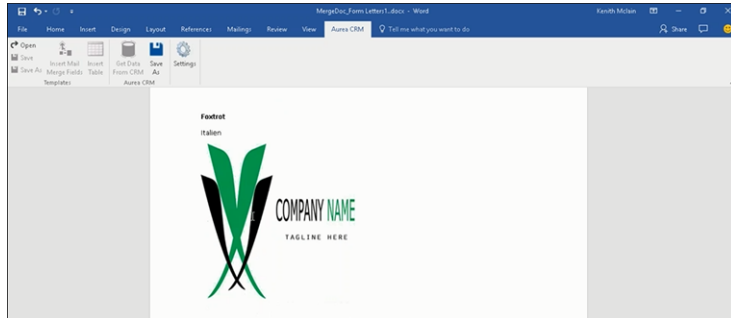
(F1Image), the name of the company (F1Company), and the country (F1Country) it is located in.

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.

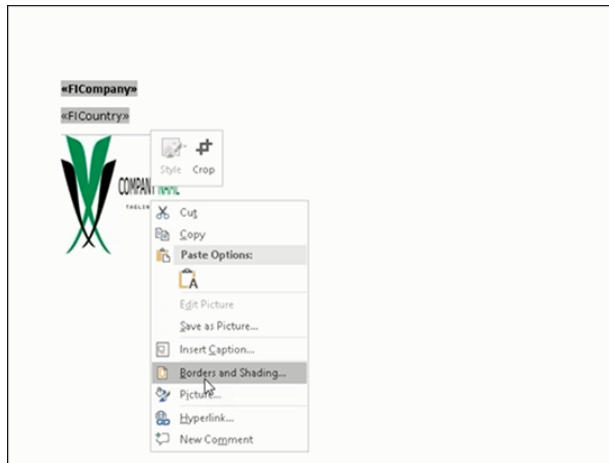


3. Format the fields to the desired fonts, bold it and other changes you desire, as you would a normal a normal word document.

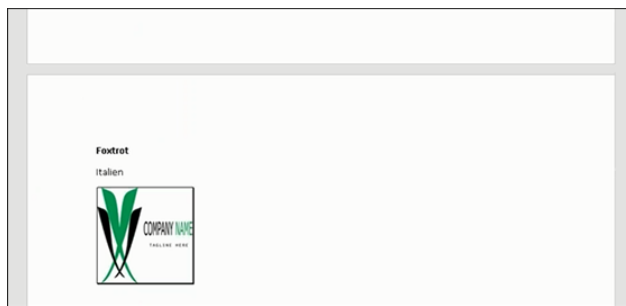
4. Click  to execute the mail merge. This fetches the data, populate the record field and create the pages for each record set in the CRM database. The screenshot below shows one of the pages generated.



5. 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.
6. 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 screenshot below.



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.

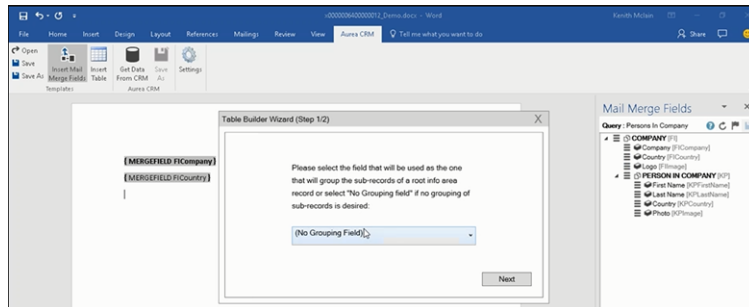
For example, if you want to group all the employees of a company into separate documents, you have to use the **Insert Table** feature. If you have two companies and three employees in each company then a simple mail merge would create six pages containing the company name and one employee name. If you use the Insert Table feature then the result document contains two pages for the two companies and all the employees of a company are 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](#). In step 11, you have to create a query that retrieves 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.

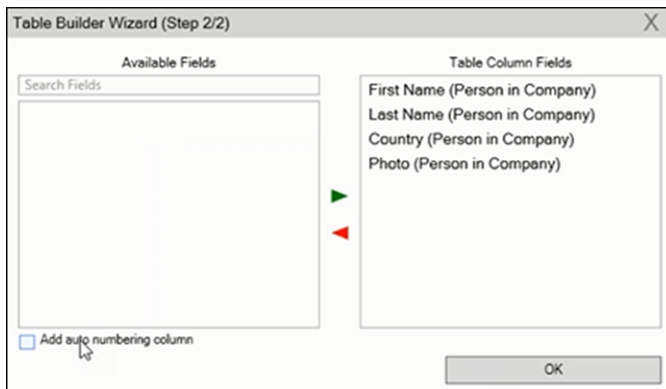
To add a table based on a grouping field, go to step 5.

To add a table without grouping fields, perform the following steps:

- a. Click Next. The Table Builder Wizard (Step2/2) dialog displays.



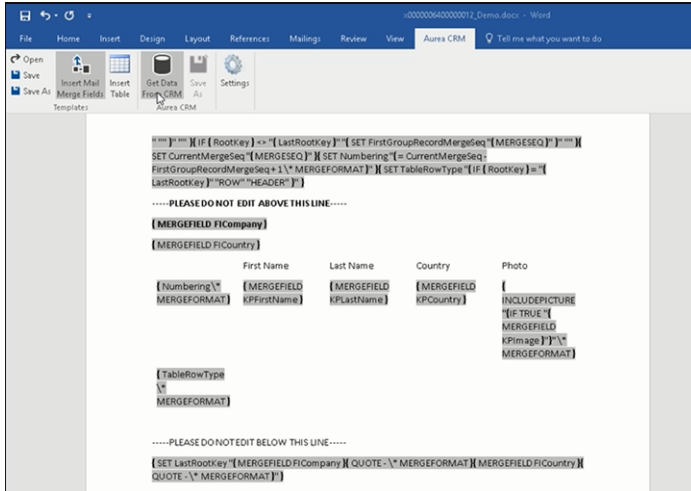
- b. The Available Fields pane in the dialog displays the records that you can add to your table.
- c. Select the records that you want to add to your table and click to select the required records. The selected records are added to the Table Column Fields pane.




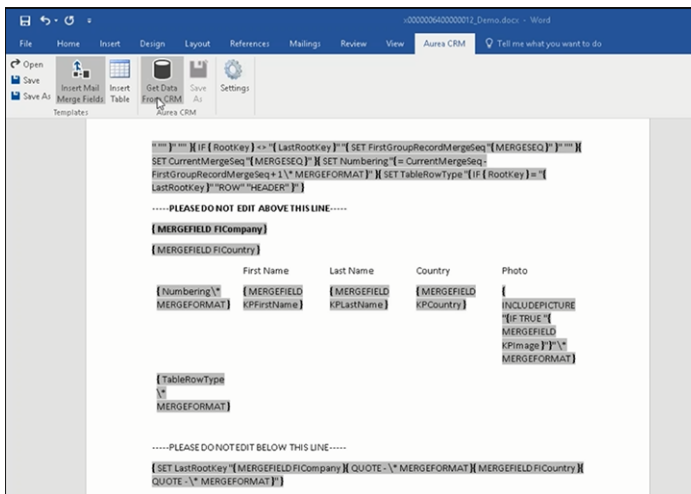
- d. Click **Add auto numbering column** to add the numbering column for all the employees that get populated for each company in the result documents.

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.



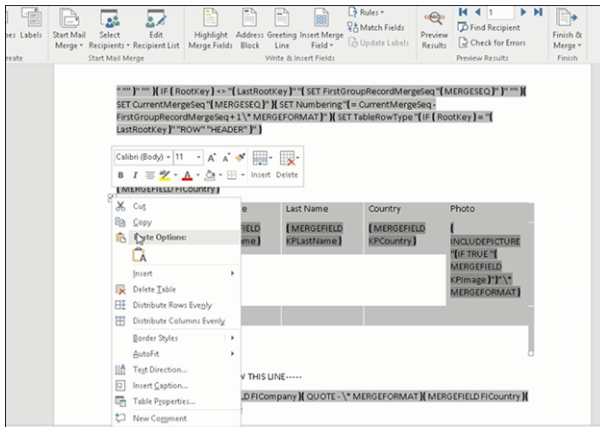
- h. Click **Start Mail Merge**.
- i. The results documents are created. Sample pages containing the tables for companies are shown below.

	First Name	Last Name	Country	Photo
1	Ludia	Parker	Italien	
2	Freddie	Lambert	Deutschland	

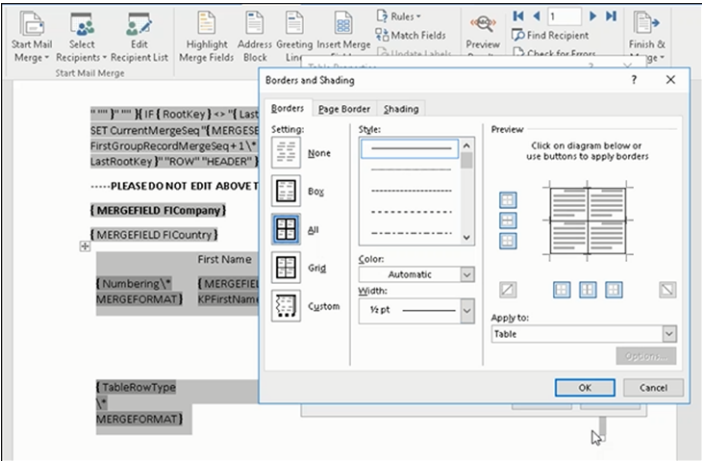
Another page:

	First Name	Last Name	Country	Photo
1	Kristy	Greene	Deutschland	
2	Brad	Paul	Osterreich	
3	Michelle	Schutz	Deutschland	

- 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 set the borders in 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.

	First Name	Last Name	Country	Photo
{Numbering* MERGEFORMAT}	{MERGEFIELD KFirstName}	{MERGEFIELD KLastName}	{MERGEFIELD KCountry}	{INCLUDEPICTURE "([IF TRUE({ MERGEFIELD KImage})"]*) MERGEFORMAT}
{TableRowType MERGEFORMAT}				


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.

.....PLEASE DO NOT EDIT ABOVE THIS LINE.....



«FICountry»

	First Name	Last Name	Country	Photo
	«KFirstName»	«KLastName»	«KCountry»	
HEADER				

.....PLEASE DO NOT EDIT BELOW THIS LINE.....

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 in the template document.

Contoso
Österreich

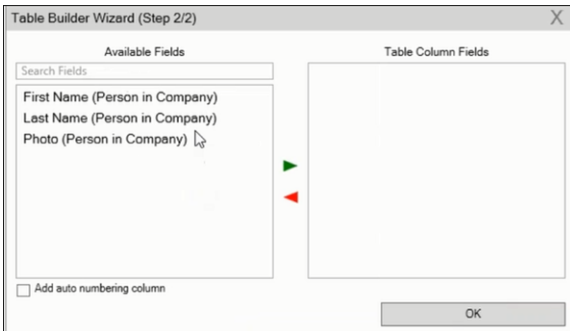
	First Name	Last Name	Country	Photo
1	Lucia	Parker	Italien	
2	Freddie	Lambert	Deutschland	

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 (Step2/2) 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.

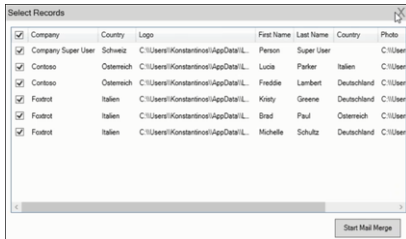
- c. Select the records you want to add to the table columns and click ► to add the records to the Table Column Fields. Click OK.

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.



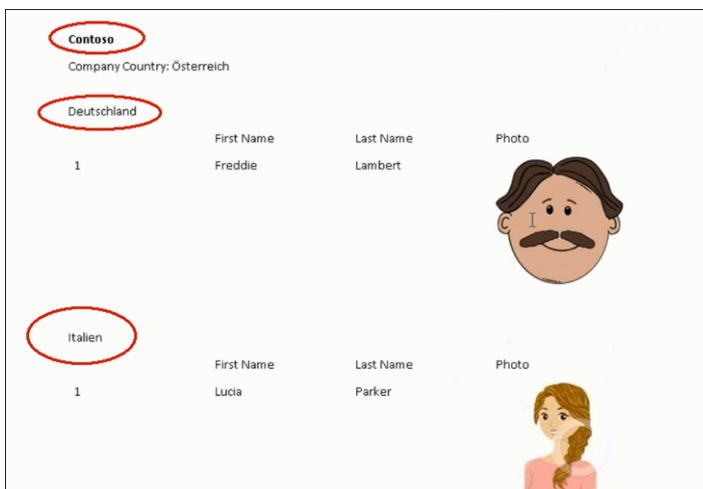
e. Click to execute the mail merge. The Select Record dialog displays. See the screenshot below.



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.

4

Other Programs and Features

Explore additional features and functions in Aurea CRM.

Below are the additional functions and features provided by Aurea CRM:

Companies and Persons – ISI

You can manage your customers (companies and persons) and competitors from the **Accounts** menu.

You can enter data concerning the companies that you have a business relationship, as well as data on persons employed at these companies (contact persons). You can also store private customers that are not employed at a company you do business with. For further details, see [Persons](#) on page 347.

Note: You can only view and edit private customers if you have the necessary access rights. Depending on your configuration, access rights, and the process, you can select contact persons and/or private customers. For readability, this document only uses the terms "contact person" or "person".

360° View of a Company

This topic explains holistic View of a Company.

When accessing company data, data is displayed in the tree view by default.

The screenshot displays the '360° View: BemComp' interface. On the left is a sidebar with a tree view containing categories like 'Persons (5)', 'Activities (>15)', 'Work Orders (0)', 'Relationships (4)', 'Tasks (0)', 'Documents (>15)', 'Sales Group (1)', 'Leads (0)', 'Opportunities (>15)', 'Opportunity Participants (>15)', 'Property Participants (1)', 'Offers (>15)', 'Orders (12)', 'Invoices (2)', 'Installed Bases (1)', 'Tickets (Contact Company) (0)', and 'Tickets (End Customer) (0)'. The top header shows contact details: Telephone +43 (1) 01123456, Website, E-mail, Rep Sunny Sales, Address Breite Gasse 1, 1040 Wien, Austria. The main content area has tabs for 'Business Data' (selected) and 'Settings'. The 'Business Data' tab contains a table with columns: Won Pro..., Lost Pro..., Revenue, Open Tic..., Opportu..., 27, Open Op..., 11, Won Opp..., 7, Lost Opp..., 9, VAT/Tax... Below this is a 'Related Data' section with a breadcrumb trail: < Map x Additional Addresses x Contact Time x Potential x Note x Portfolio x. A table below shows 'Additional Addresses' with columns: Address Type, Street, Postal C..., City, Country. The table contains two rows: 'Delivery Address' (Liefer..., 1010, Wien, Austria) and 'Billing Address' (Lands..., 1010, Wien, Austria).


The following areas are displayed:

- The header contains an overview of the most important data. The header is always displayed, even when you are displaying or editing data in related records.
- Tree: The available child info areas are displayed in the tree.

The number of (open) records of each type is displayed in brackets, e.g. the number of contact persons or the number of open tickets.

- Details mask: This area displays the data in the selected record. The header in this area includes several buttons that allow you to edit the data. Move your mouse cursor over a button to display a tooltip containing the button's function.

Addresses, e.g. the address of a company and additional addresses can also be displayed on a map, see [Map View](#). To display addresses on the map, you require a license for Bing Maps.

Select  (**Accounts**) > **Open Issues** to display all companies where you have an activity scheduled this week and next week. Select a company in the list. The open activities are listed under **Related Data** broken down by info area (e.g. opportunity, offer etc.).


You can enter links to the company's social media profiles (e.g. Twitter) in edit mode, see [Assigning Icons to Links](#).

Note: By default, only active companies are returned by the company search. Enable the **Inactive** check box to include inactive companies in the results. For more information on active and inactive companies, see [Persons](#) on page 347.

Note: The **disable tweaks** option in `TE_ISI` configuration is enabled by default for **Activities**. Due to which, only activities that are linked directly to the FI info area are shown on the screen.

Adding New Companies

To add a new company:

1. Select  (**Accounts**) > **New Company**. The input mask is displayed.
2. Enter the data and click **Save**.

Persons

Persons in Aurea CRM can be contact persons at a company and/or private customers.

The same person may occupy different roles at different companies, each of which is represented by a contact person record.


Note: You can always view contact persons , and can add new records if you have the necessary access rights. Whether you can view and add private customers and roles depends on your configuration.

You can add private customers, which represents the person themselves, not a role at a company. You can enter information such as the person's date of birth and private contact data in these records. A private customer can also occupy a role at a company; the person is then also stored as a contact person at the company. For further details, see [Private Customers and Roles](#).

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). Select **Set as "Private Customer"** from a contact person's context menu to determine that the contact person is also a private customer. For further details, see [Contact Persons](#).

Select  (**Accounts**) > **Contact Persons/Private Customers** to search for contact persons/private customers.



When searching for contact persons, a separate entry is displayed in the list for each of a person's role; if a person has multiple roles, they are listed multiple times.

Note: You can set a company, contact person or private customer to inactive by selecting a **Reason for exclusion**. The **Inactive** field is then enabled (unless "Opt-out" is selected for a private person) and the **Exclude from Marketing Activities** check box is enabled in contact person, private customer and role records upon saving. If you set a company or a private customer to inactive, all linked roles are also set to inactive. The **Private Customer** check box cannot be enabled if the reason for exclusion is "Opt-out". If you enable the check box in a record where "Opt-out" is entered, the reason for exclusion is removed; if you enter "Opt-out" as the reason for exclusion and the check box is enabled, the check box is disabled. By default, only active records are returned by the company, person, private customer and contact person searches (**Inactive** field in the record). Enable the **Inactive** check box in the search mask for contact persons and private customers to list inactive records. Inactive records are indicated with a gray bar. Inactive records are displayed at the bottom of the list of records in tree views (e.g. the **Contact Person** node in the company tree). If you have the necessary access rights, select  (**Accounts**) > **All Persons** to search for any person (contact persons and private persons), including any inactive records.

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).

1. You can add contact persons as follows:

- Select  (**Accounts**) > **New Contact Person**. Find and select the company (or add a new company) the contact person should be added to. The person mask is displayed.
 - Switch to the desired company, click on **Persons** in the tree and then click on  (**New Contact Person**) in the search results.
2. Enter person's company-specific details (e.g. **Function** and contact data at the company). The company's telephone number is automatically entered as a suggestion for the person's number. You then only need to add their extension.
3. Save the record. Contact persons are displayed in the **Persons** node of the company tree.

Note: You can also enter information on a person's social media profiles, see [As-signing Icons to Links](#).

360° View: BemComp

Teleph... +43 (1) 01123456 Lead Pr... Address Breite Gasse 1
 Website Sector 1040 Wien
 E-mail Rep Sunny Sales Austria

Mr. Peter Pepper

Overview

Name	Mr. Peter Pepper	ABC	Source
Departm...	Rep	Date of ...	
Function	Position		
Job Title			

Contact

Telephone	E-mail	Last Acti...	05.09.2013
Mobile T...	Home of...	Language	
Fax			

Comment | Photo | Settings

Related Data

Contact Time x | Note x | All Roles x | History x

Company	Position	Function	Tel 1	E-mail
BemComp				

Activities to all Roles


Type	Subject	Rep	Star...	Starts at	E...	E...	Status	C...
L...	1-214000046	Char...	28.01...	08:37			Scheduled	Be...
L...	1-214000046	Char...	28.01...	08:40			Scheduled	Be...
L...	Offerte 1-214	Sunn...	28.01...	10:44			Scheduled	Be...

- Select **Set as "Private Customer"** from the contact person's context menu to determine that this person is also a private customer. If a contact person is also a private customer, select **Open Private Customer** from the context menu to switch to the private customer's tree view.
- All the person's roles are listed on the **All Roles** tab under **Related Data**.
- Click on **+** (**New Role in Another Company**) to add a new role for the person at a different company, see [Private Customers and Roles](#).
- All activities linked to the person's role are listed at the bottom of the **All Roles** tab. This includes any activities with the person as a private customer.

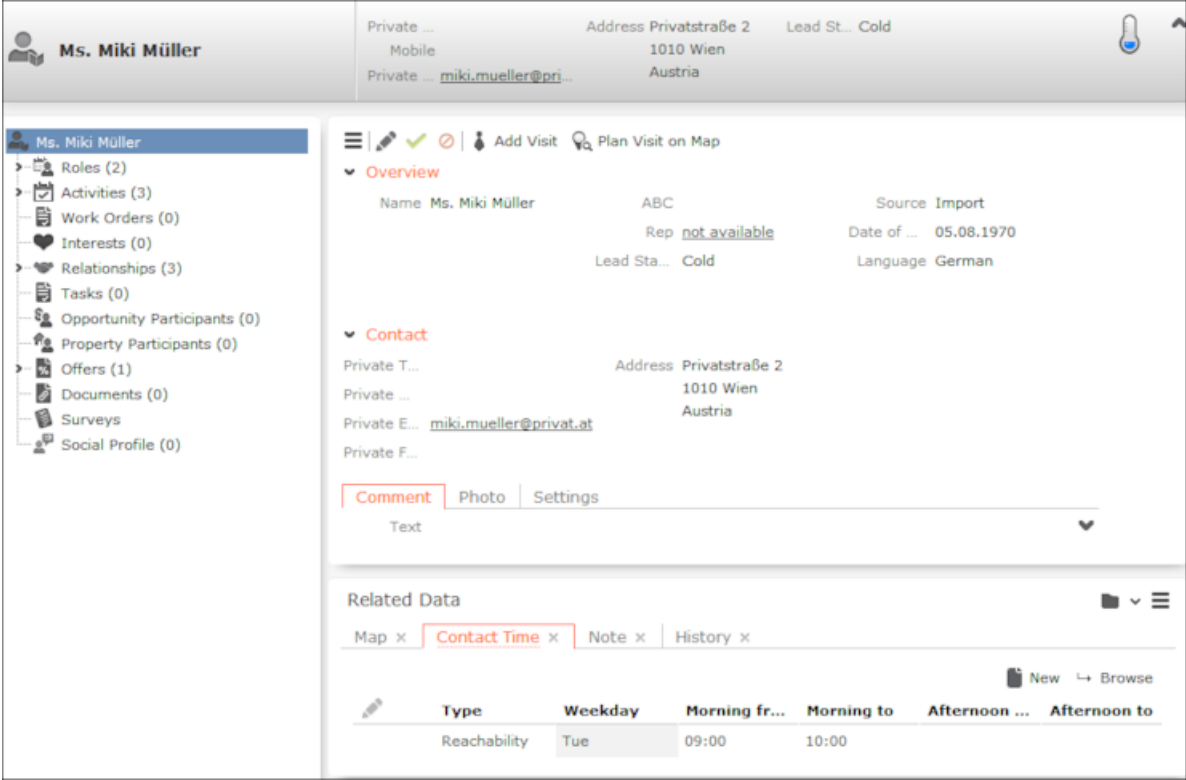
Private Customers and Roles

When adding a private customer, enter their personal details and private contact data (e.g. their date of birth, private e-mail address).

To add a **private customer**:

1. Select  (**Accounts**) > **New Private Customer**. The person mask is displayed.
2. Enter the data.
3. Save the record. The person tree is displayed.

Note: You can also enter information on a person's social media profiles, see [As-signing Icons to Links](#).



The screenshot shows the CRM interface for Ms. Miki Müller. The sidebar on the left contains a tree view with the following nodes: Roles (2), Activities (3), Work Orders (0), Interests (0), Relationships (3), Tasks (0), Opportunity Participants (0), Property Participants (0), Offers (1), Documents (0), Surveys, and Social Profile (0). The main content area is divided into several sections:

- Overview:** Displays key information such as Name (Ms. Miki Müller), ABC, Source (Import), Rep (not available), Date of Birth (05.08.1970), and Lead Status (Cold).
- Contact:** Shows contact details including Address (Privatstraße 2, 1010 Wien, Austria) and email (miki.mueller@privat.at).
- Comment/Photo/Settings:** A section for adding comments or photos.
- Related Data:** A section with tabs for Map, Contact Time, Note, and History. Below this is a table with columns for Type, Weekday, Morning from, Morning to, Afternoon from, and Afternoon to.

Type	Weekday	Morning fr...	Morning to	Afternoon ...	Afternoon to
Reachability	Tue	09:00	10:00		

- Click on the **Roles** node in the tree to display all the person's roles at various companies.
- The person tree displays all records linked to the person, e.g. all activities linked to the person in any role.

A private customer can also occupy a role at a company. In this case, the private customer is both a contact person at a company and a private customer. The same person can occupy roles at multiple companies.

To add a role at a company for a private customer:

1. Switch to the desired private customer.
2. Click on the **Roles** node in the tree.
3. Click on **+** (**New Role**) in the results list.
4. Select the **Company**.

5. Enter the person's company-specific details (e.g. **Function** and contact data at the company).
6. Save the record.

To add another role at a company for a contact person:

1. Switch to the desired company and select the contact person.
2. Switch to the **All Roles** tab under **Related Data**.
3. Click on **+** (**New Role in Another Company**) to add a new role for the person at a different company.
4. Find and select the company (or click on **+** (**New**) to add a new company).
5. Enter the person's company-specific details (e.g. **Function** and contact data at the company).
6. Save the record.

Note: You can enter up to five functions, positions and departments per role.

Interests

Learn to store information on a person's interests.


You can store information on a person's interests (e.g. hobbies or whether they wish to receive certain newsletters). This information can be used for marketing campaigns. It may also be useful when meeting business partners, to strike up a conversation.

Which interests are available is defined by your administrator.

To assign interests:

1. Switch to the desired person.
2. Expand the person tree and click on the **Interests** node.
3. Click on **♥ (Interests)** in the results list. A new page opens.

♥ Interests for Contact Person Mr. Bob Fine



Books

Hobbies

Cinema Culture Music Sport

Information

Newsletter Product Info


4. Click on the small arrow to expand the interests tree. Enable the corresponding check boxes to assign interests to the account or contact person and click **Save**.

Competitors

You can store data concerning your competitors in Aurea CRM web.

The input mask and the child data displayed in the tree are different for competitors. You can enter information such as the strengths and weaknesses of your competitors.

To add a competitor:

1. Select  (**Accounts**) > **Competitors**. The input mask is displayed.
2. Enter the data and click **Save**.

Merging Companies and Persons

Duplicate company and person records in the database can be merged to form a single record.

Conflicts can occur if the same field contains different values in the two records. In this case, you need to decide which data to retain. For example, you can determine which data should be retained on a field by field basis or determine that all data in the first or second record should be retained.

The record merge process is started from is referred to as the source record below. The record is being merged with is referred to as the target record. The source record is removed from the database. The target record is saved and contains the merged data.

To merge companies or persons:

1. Select **Merge with** from the company or person's context menu (e.g. in the search results list or tab view). You can also mark the two entries in the results list you wish to merge and select **Start Merge Process** from the context menu. The process used to merge records is started and the company/person search is displayed.

Note: You require administrator rights to access this function.

2. Search for the target record that you wish to merge the source record with and double-click on it. An overview of both records is displayed.

Start Merge Process
Source: M. Erge Inc.
Target: M. E. Erge

Prepare Resolve 0% Run

Overview of records to be merged

Source Record (will be deleted)

Company M. Erge Inc.
Postal Code 21000
City New York
Street Kensington St. 111
Country USA

Target Record (will be kept)

Company M. E. Erge
Postal Code
City New York
Street Ken St.
Country

Switch records

Merge method

If a conflict occurs:

user decides conflict resolution
 Source record always wins.
 Target record always wins.
 In the case of conflicts the newer record is used

Cancel Continue

3. Click on **Switch records** to switch the target and source records.
4. Choose one of the available options:
 - **User decides conflict resolution:** You can decide which of the two values to retain for each field.
 - **Source record always wins:** The fields in the source record are saved in the database; the data in the target record is discarded.
 - **Target record always wins:** The fields in the source record are saved in the database; the data in the target record is discarded.
 - **In the case of conflict the newer record wins:** The modification date of the individual fields in both records are compared with one another and the most recent value is retained.
5. Click on **Continue**.
6. The option selected in the previous step determines what is displayed next:
 - If **user decides conflict resolution** was selected, you can select the field values to be retained.

By default, all fields in the source record are selected (highlighted in green). To retain the value in the field in the target record, click on the contents of the field in the **Target [company/person]** column.

Start Merge Process
Source: M. E. Erge
Target: M. Erge Inc.

Prepare **Resolve** 0% Run

Resolve Conflict for Company M. E. Erge and Company M. Erge Inc.

Field	Source Company M. E. Erge	Target Company M. Erge Inc.
Company	M. E. Erge 15.03.2013 15:00	✓ M. Erge Inc. 15.03.2013 14:59
Country	✓ UK 15.03.2013 15:08	USA
Postal Code	✓ SW 10 15.03.2013 15:08	21000
City	✓ London 15.03.2013 15:08	New York 15.03.2013 14:59
Street	✓ Kennington Street 99 15.03.2013 15:08	Kensington St. 111 15.03.2013 14:59
Country Code	15.03.2013 15:08	✓ 1
Telephone	✓ 789456-0 15.03.2013 15:00	123456-0 15.03.2013 14:59
Fax	✓ 789456-2 15.03.2013 15:00	123456-789 15.03.2013 14:59
E-mail 1	✓ info@erge.co.uk 15.03.2013 15:08	info@merge.com 15.03.2013 14:59
Rep 1 ID	010001954 15.03.2013 15:08	✓ 010001678
Rep 2 ID	✓ 010001678 15.03.2013 15:08	
Co. Type		✓ Head Office 15.03.2013 15:07
Sector		✓ Media 15.03.2013 15:07
Rep 1 Grp. ID	✓ 15.03.2013 15:08	010000007
Rep 2 Grp. ID	✓ 010000007 15.03.2013 15:08	
Rep 1	✓ Peter Parker 15.03.2013 15:08	Miranda Meyer
Rep 2	✓ Miranda Meyer 15.03.2013 15:08	
Rep 1 Grp.		✓ Release Management
Rep 2 Grp.	✓ Release Management 15.03.2013 15:08	

Cancel Continue

- If you previously selected **Target record always "wins"** or **Source record always "wins"**, an overview is displayed, but you cannot make any changes.
- No overview is displayed if you selected **In the case of conflict the newer record wins**.

7. Click on **Continue**.

8. If child records have been added for both the source and target record and these also contain identical or similar data, these also need to be merged. Click on **Continue** to merge each child record. The option selected for the parent record is also applied to the child records.

Note: Your administrator can determine whether all fields are listed, or only those where the contents differ. If only those fields that differ are displayed, there may be child records that are listed without any fields - in this case, the contents of

the fields in both records are identical. In such cases, key conflicts may however occur, and you therefore need to click on **Continue** for each record.

9. Click on **Start Merge Process**.


Customer Fact Sheet

The customer fact sheet contains an overview of the information stored for a customer and is suitable for printing.

To create a customer fact sheet:

1. Switch to the desired company.
2. Click on  (**Customer Fact Sheet**) in the header. The customer fact sheet is generated.

Note: Your browser's popup blocker may prevent the customer fact sheet from being displayed.


3. Click on  to print the customer fact sheet.

Additional Addresses

You can add additional addresses for companies, e.g. a separate billing and delivery address.

Additional addresses can also be linked to properties.

To add an additional address:

1. Switch to the desired company.
2. Switch to the **Additional Addresses** tab under **Related Data**.
3. Click on  (**New**).
4. Select the **Type** of address and enter the address.

Note: You can only add one additional address per account and **Address type**.

5. Save the record.

If you have a Bing Maps license, you can display the additional address on a map. For further details, see [Map View](#).

Checking Tax IDs

If enabled by your administrator, you can verify tax IDs using a button or context menu entry (**Check Tax ID**).

The tax ID is verified via a service provided by the European Commission (http://ec.europa.eu/taxation_customs/vies/vieshome.do).

The date and status of the verification are displayed on the **Business Data** tab.

Messages concerning the verification are available in your inbox.

Contact Times

You can enter contact times for companies and persons. Example - opening hours or a person's work hours.

These times are color-coded in the daily & weekly planning view to aid you in planning appointments when adding an activity for customers using drag&drop.

Contact times must be entered separately for each day of the week. You can enter contact times for the morning in the **Morning from/to** fields, and for the afternoon in the **Afternoon from/to** fields. You need to define both the start and the end of each of these time periods. If you enter an end time that is earlier than the start time, a message is displayed.

You can also enter holiday periods during which a company is closed. These holidays are taken into account when planning visits to the Aurea CRM web.

To enter contact times for a company or person:

1. Switch to the desired company or person.
2. Switch to the **Contact Time** tab under **Related Data**.
3. Click on **+** (**New**).
4. Select the **Type** and **Weekday** and enter the contact times in the appropriate fields.
5. Save the record.

Potential

You can enter an estimate for the revenue development of individual product groups and business areas per year for your customers, and compare these values with the actual revenue you have achieved.

For example, the goods or services a customer has purchased might indicate which items or services the customer might need in the future, allowing you to offer these to the customer.

To define a potential:

1. Switch to the desired company.
2. Switch to the **Potential** tab under **Related Data**.
3. Click on ⊕ (**New**).
4. Enter the year and your estimate, and select the product group and currency click **Save**.

Evaluating a Company's Potential

To evaluate all potential records added for a customer:

1. Switch to the desired company.
2. Click on ≡ (**Potentials**). The analysis is executed.

Adding Potential Records Automatically

Potential records are added automatically and updated whenever an offer item or order item is entered. The potential record is updated or added for each product group and business area entered in offer and order items added for this company this year.

Furthermore, aggregated records are also added where the **Product Group** and **Business Area** are empty. The data in the potential records for individual business areas and product groups are stored in these records.

The values in the **Revenue** and **Potential minus Revenue** fields are calculated automatically. The **Revenue** is calculated from the sum total of the value of all orders over the year per product group and business area.

Note: In order for offers and orders to be included in the calculations of the potential, a date must be entered in the offer or order, and a **Product Group** needs to be entered in the offer or order items.

Relationships

Relationships are used to depict hierarchies and networks between companies and persons.

You can store relationships between companies and persons (e.g. parent and subsidiary companies, sales partners, suppliers, competitors) and display the resulting networks.

Adding Relationships

To add a new relationship:

1. Switch to the desired company/person, click on **Relationships** in the tree and then click on ⊕ (**New**) in the results list.
2. Choose whether you want to add a relationship with a company (**Company Search**) or a person (**Person Search**).

3. Select the record you want to add the relationship with in the search results.
4. Determine whether a reciprocal relationship should be added.

The **Do you want to create a reciprocal relationship?** check box is enabled by default. If the type of relationship you are adding is between two companies and of the type "Parent", the reciprocal relationship is "Subsidiary" (i.e. one company is the parent company and the other is the parent's subsidiary).

Relationship type	Relationship	Business Area	Level
Business	has regular contact with		3
Business	has regular contact with	Marketing	
Business	has regular contact with	Service	

5. You can double-click on an existing relationship on the **Predefined** tab to use that relationship.
6. If the relationship you wish to define is not listed, switch to the **Customize** tab to define the desired relationship:


- a. Enter the **Type** of relationship, the **Relationship** and the **Business Area**. The first row defines the relationship, the second row defines the reciprocal relationship.
- b. Click on **Continue** to add the relationship.

Relationship Hierarchy


The relationship hierarchy provides a graphical overview of all companies and persons that are directly or indirectly linked to other companies or persons.

Note: The relationship hierarchy is only available for companies and contact persons, not private customers, see [Persons](#) on page 347.

To display the relationship hierarchy:

1. Switch to the desired company/person record.
2. Click on **Relationships** in the tree and then click on  (**Hierarchy Tree**) in the results list. A page containing a hierarchical overview of the relationships is displayed. The company you access the relationship hierarchy from is displayed in bold.



3. Click on an entry to display the related record's data below the hierarchy.
4. Click on  (**Show Menu**) next to an entry in the hierarchy and select **Open** from the context menu.

Note: You can also click on  (**Company Hierarchy / Relationship Chart / Hierarchy Tree**) to open the hierarchy tree from a company record.

Cyclical Relationships

If cyclical relationships exist (e.g. A is partner of B; B is a partner of C; C is a partner of A), one of the companies/persons needs to be displayed more than once. One occurrence is defined as the **main record** and the other as duplicates. Duplicates are indicated using an *.



No further relationships are displayed for duplicates. All relationships are displayed for the main record, except for the company/person directly above the main record in the tree. This includes relationships to companies that are in turn linked to duplicates of this company/person. This allows you to display all relationships for this company/person at a single point in the tree.

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. Define the **Relationship type**, **Relationship** and **Business Area** for both the relationship and the reciprocal relationship, and enter the appropriate **Level**.
4. Save the record.

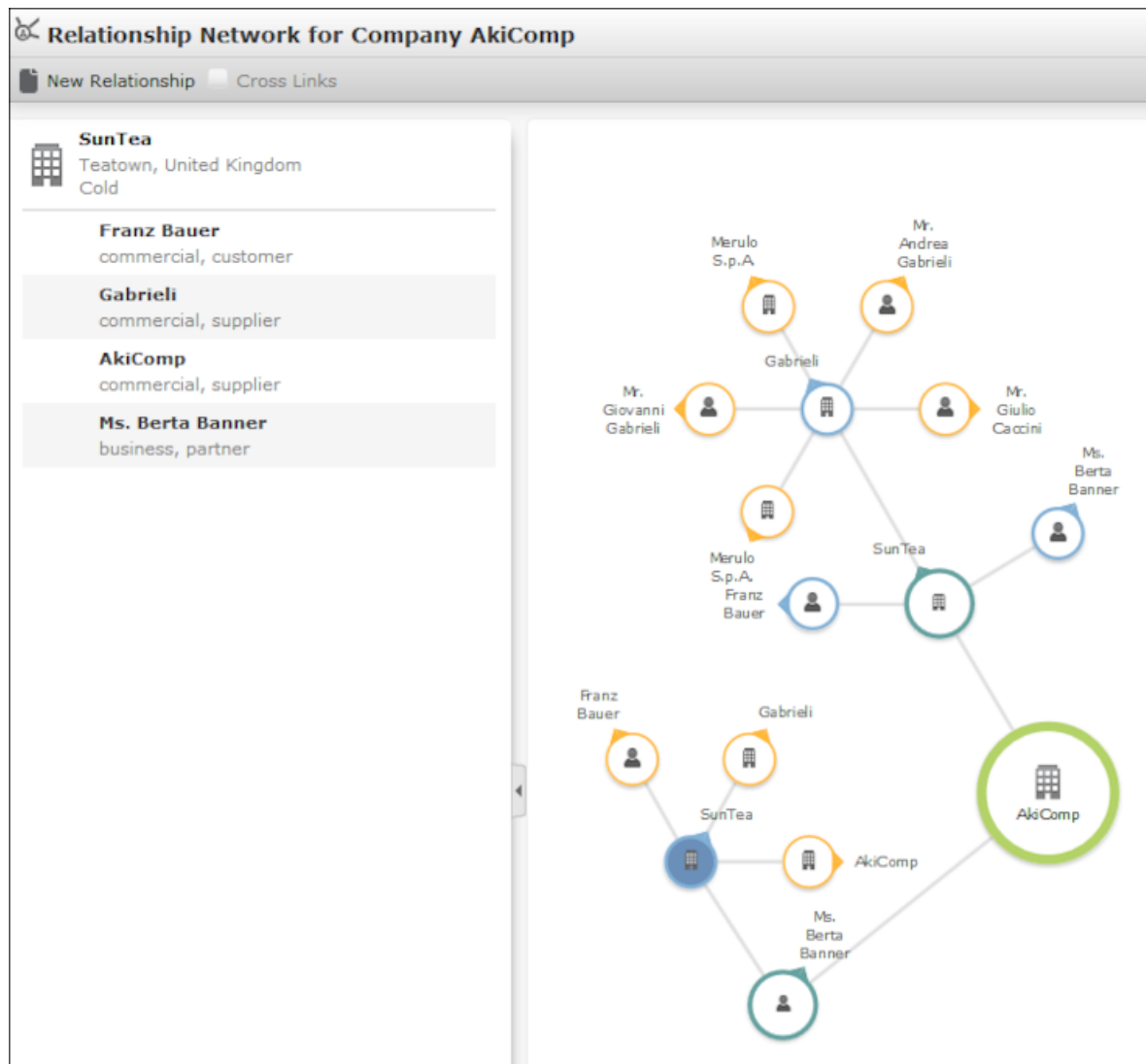
The defined relationship can then be selected when defining relationships.

Relationship Chart and Company Hierarchy


The relationship chart displays all a person's relationships with other persons and companies. Corporate relationships are not displayed.

The company hierarchy displays corporate relationships between companies (e.g. corporate structure, ownership stakes).

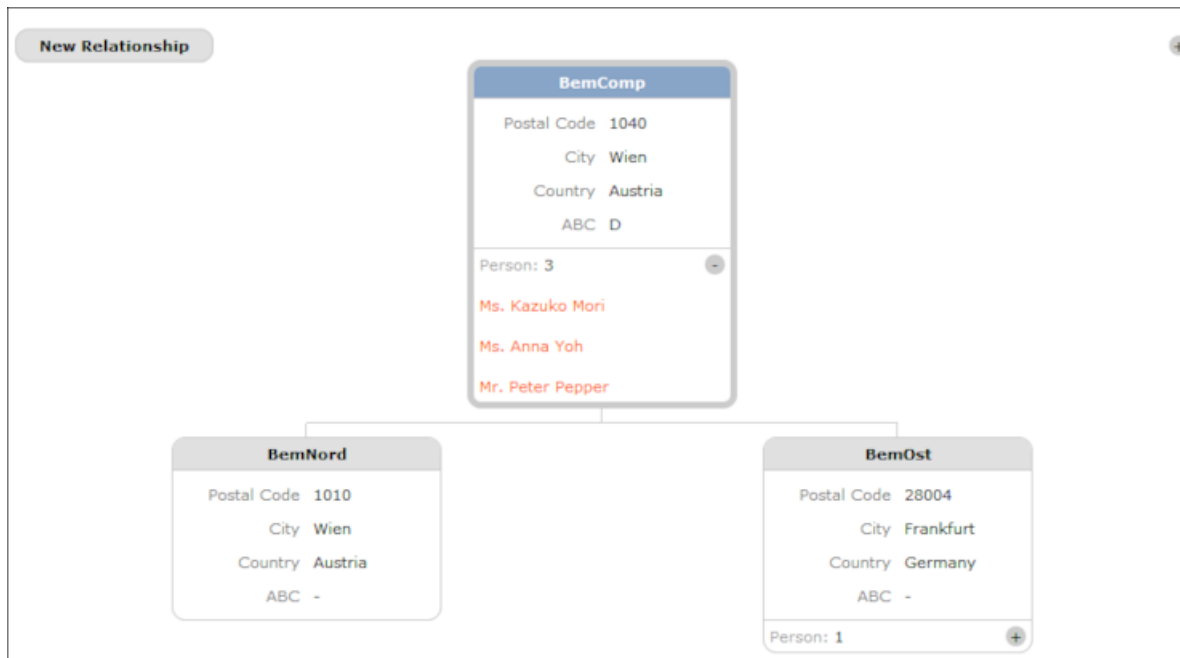
You can access the relationship chart from a person ( (**Relationship Chart**)) or company ( (**Company Hierarchy / Relationship Chart / Hierarchy Tree**)). The chart displays the relationship network. For further details, see [Relationship Network](#).




The current record is displayed as a large node with a green border. All 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](#).
- Click on a node to display the relationships defined for that record in the list on the left.

Click on  (**Company Hierarchy / Relationship Chart / Hierarchy Tree**) to access the company hierarchy from a company.

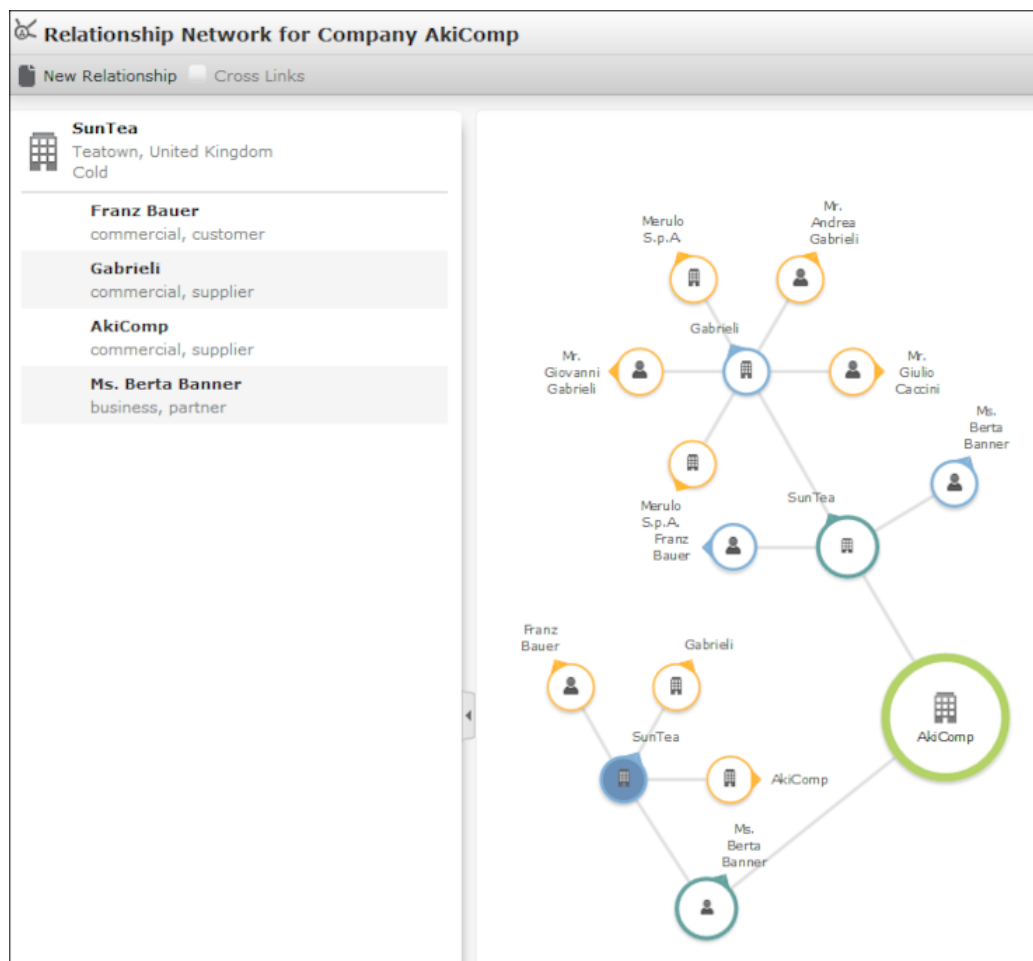




- Click on  to show/hide the persons in a company.
- Click on **New Relationship** to add a new relationship.





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](#). 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.

Figure 1: Cross Links Disabled

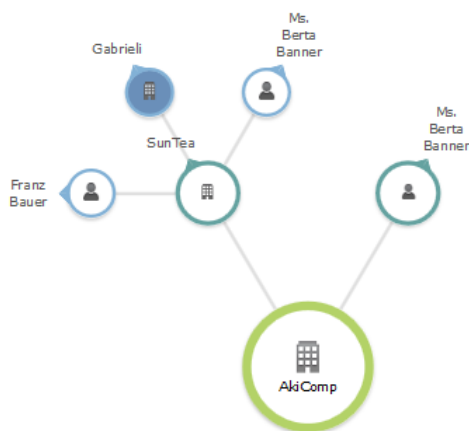
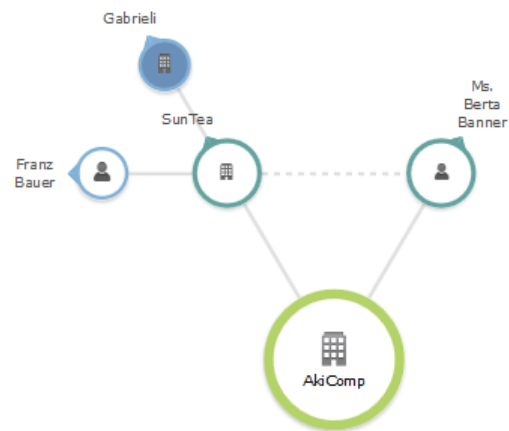


Figure 2: Cross Links Enabled



Portfolios

Portfolios allow you to classify your customers by answering a series of questions. Customer classifications help you define your customer support strategy.

A portfolio consists of a questionnaire. The questions in the questionnaire are weighted and the results are displayed graphically.

To classify a customer based on a portfolio:

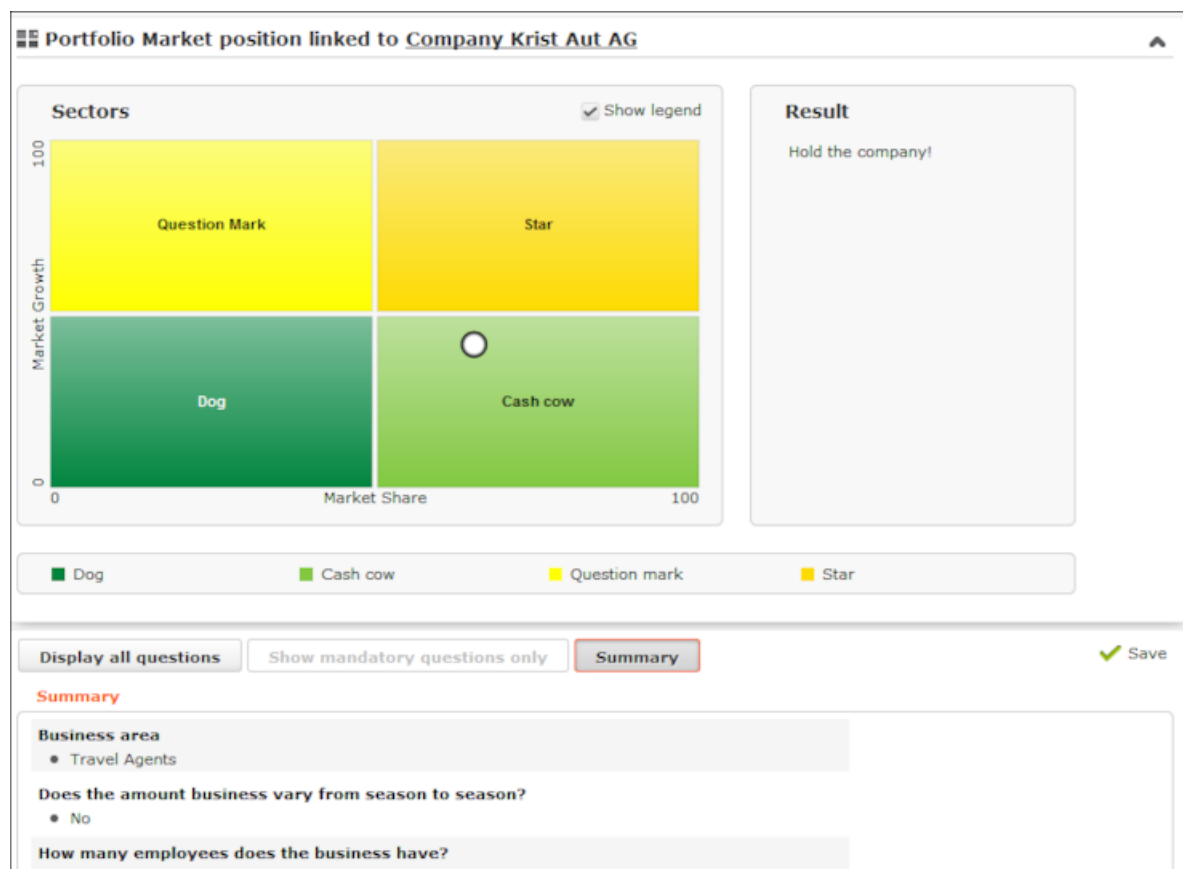
1. Switch to the desired record (company, opportunity or property).
2. Switch to the **Portfolio** tab and click on **+** (**New**).

Note: Opportunities are evaluated as part of the opportunity process, see [Phase 3 - Cover Buying Center](#).

You can also evaluate properties, see [Evaluating Properties](#) on page 246.

3. Search for and select the desired portfolio.

The sectors defined in the portfolio are displayed in the top section, the questions in the portfolio are displayed in the lower section (including any sections if sections are defined in the portfolio):



4. Answer the questions. The white circle in the sector overview moves to the appropriate sector depending on your answers.

If the questionnaire includes mandatory questions, click on **Show mandatory questions only** to restrict the questions displayed to only the mandatory questions. Click on **Summary** to display a summary of the answers to questions that have been answered.

Note: You can answer any number of portfolios. The result of the most recent portfolio is written to the **ABC** field in the related company, opportunity or property.



Portfolio Configuration

Use the **Portfolio Configuration** info area to determine how many rows and columns (X and Y axes) your portfolio contains. The sum total of all column widths and row heights should be 100%. If the sum total is less than 100%, the columns and rows are increased accordingly; if the value is above 100%, additional columns and rows are not displayed.

You can assign a color to each sector. If you do not assign any colors, colors are assigned by the system (up to 20). If your portfolio contains more than 20 sectors, the colors are reused.

Note: You can only add records to the **Portfolio Configuration** info area if you have the necessary access rights.



To add a new portfolio configuration:

1. Select  (**Settings**) > **Maintenance** > **Portfolio Configuration**.
2. Click on **Start Search** and then on  (**New**).
3. Enter the name of the portfolio configuration in the **Text** field.
4. Enter the number of columns and rows in the portfolio, which determines the total number of sectors (columns x rows).
5. Enter the column width and row height. Enter the widths and heights as percentages using a semicolon (;) to separate the value for each column/row. You can use either '.' or ',' as the decimal separator.
6. Click **Save**.

Defining Portfolios

Note: You can only define portfolios if you have the necessary access rights.

To define a portfolio:

1. Select  (**Settings**) > **Maintenance** > **Portfolio**.
 2. Start the search and click on  (**New**).
 3. Select the type of portfolio you want to add.
 4. Click on + (**Add/Find Catalog Values**) next to the **Portfolio** field. The **Find or Add Catalog Value** window opens.
-

5. Enter a name for the questionnaire and click on **New**.
6. Select a **Portfolio Configuration**.
7. Enter a description for the X-axis in the **Potential description** field and a description of the Y-axis in the **Customer intimacy description** field.
8. Enter an **Info Area Code** and **Field Number** to determine that the classification determined using the portfolio is written to the corresponding field.

Note: By default, the first character in the **Classification** field of the portfolio sector description is transferred to the **ABC** field in the record from which the portfolio was accessed. If you enter an **Info Area Code** and **Field Number**, the value in the **Classification** field is entered in the selected field instead. Whether the entire description or only a portion is entered in the target field depends on the length of the target field.

9. Save the record.
10. Define the sector descriptions:
 - a. Click on **Portfolio sector description** and then on **⊕ (New)**.
 - b. Enter the column and row number of the sector the description applies to (e.g. if you have 4 sectors, row 1/ column 1 is the bottom left sector; row 2/column 2 is the top right sector).
 - c. Enter a text in the **Classification** field that is displayed in the portfolio's legend. Enter a text in the **Name** field that is displayed in the sector itself. Enter a text in the **Result** field that is displayed to the right of the sectors.
11. Click on **Questions** in the tree and define the questions and answers in the portfolio, >> [Defining Questions](#) on page 369 and [Defining Answers](#) on page 371.
12. Click **Save**.

Lead Status

The lead status determines your current relationship with a customer or prospect. Example - interest, lead, customer.

Aurea CRM automatically logs how long a customer has been assigned a particular lead status (in days). You can enter a reason for changing the lead status.

Analyses

Learn about Analyses.

Predefined analyses are available in many areas of Aurea CRM web, see [Analyses](#) on page 366. These analyses can be accessed from **Analyses** entry in the corresponding records' context menus.

The following analyses are available for companies, for example:

- Potentials
- Costs
- Revenue Statistics

Miscellaneous

Ask your administrator to add additional miscellaneous info areas to your configuration.

The following info areas are not accessible in the default version of Aurea CRM web. Your administrator can however add these info areas to your configuration.

City/Country

To facilitate the input of addresses, the city and telephone codes are entered automatically based on the country and postal code.

Records can be added to the **City** info area as follows:

- By importing
- By manually adding new records in the **City** info area (**Service** module)
- When adding a new company or person: If no suitable record is found in the **City** info area, a new record is added to the **City** info area when entering the address.

The international dialing code is written to the **Country** table.

Sales Areas

When using Aurea CRM web in conjunction with ERP systems such as SAP, you can import sales areas.


The **Sales Area** info area defines a combination of **Sales Organization**, **Sales Channel** and **Branch** that constitute a sales area. Sales areas can be assigned to items. A unique combination of **Sales Organization**, **Sales Channel** and **Branch** needs to be imported.

The **Sales Area (Company)** info area is a child info area of the **Company** info area and is used to assign customers to specific sales areas. This data is also imported. The sales areas assigned to a company are displayed in the **Sales Area (Company)** node in the tree view.

The **Sales Area (Item)** info area allows you to assign a sales area (**Sales Channel** and **Sales Organization**) to an item (**Item Name**, **Item No.**, **Product Group** and **Product**). This data is imported from an external system. As in SAP, the info area does not include the branch. This means that sales sectors which only differ in the **Branch** field are assigned to the same items.

You can assign any number of sales sectors to a company. When adding offers, customer-specific sales areas are then suggested.

You can select a sales sector added for a certain company when adding an offer. If a sales sector is entered in an offer, then only those items assigned to the sales sector are listed.

Note: The **Sales Area** and **Sales Area (Company)** info areas are disabled by default. For further information contact your administrator. If you have the necessary access rights, select  (**Settings**) > **Maintenance** > **Sales Area** to display an overview of all sales areas. If an item recorded is deleted from the item master, all records in the **Sales Area (Item)** info area added for that item are also deleted.

Revenue and Sales Statistics

External statistics (e.g. stored in an ERP system) concerning sales quantities and revenue can be imported into Aurea CRM web.

These statistics allow you to monitor sales figures (revenue and quantity) per customer.

Cumulated values and the difference compared to the previous year are calculated automatically.

Revenue Statistics

You can display the **revenue development** of a company over the course of a year as compared to the revenue figures the previous year. The differences between the figures are calculated automatically.

The data is displayed graphically, either for a year, quarter or month.

Sales Volume Statistics

You can display the **sales volume development** of a company over the course of a year as compared to the revenue figures the previous year. The differences between the figures are calculated automatically.

Note: Revenue and sales volume statistics are available from the corresponding nodes in the company tree. These info areas are disabled by default. For further information contact your administrator.

Surveys – ISI and LSI

Learn about surveys.

You can define questionnaires to be used in telephone marketing campaigns, for example. You can:

- Define the questions in the questionnaire and possible answers
- Define branches in the questionnaire that are carried out based on the answers given to specific questions
- Define mandatory questions and default answers
- Use values in the database as answers
- Update records based on the answers received


Surveys can be carried out from an activity record. Within the scope of campaigns, you can automatically assign a questionnaire to the activities generated for the campaign, see [Defining Marketing Activities](#) on page 385.

Surveys that have been carried out for a person or company are displayed in the company/person tree view.

Defining Questionnaires

Learn to define questionnaires.

To define a questionnaire:

1. Select  (**Collaboration**) > **Questionnaire**.
2. Click on **Start Search** and then on **⊕ (New)**.
3. Click on **⊕ (Add/Find Catalog Values)** next to the **Questionnaire** field. The **Find or Add Catalog Value** window opens.
4. Enter a name for the questionnaire.
5. Click on **New**.
6. Save the record.
7. Define the questions and answers, see [Defining Questions](#) on page 369 and [Defining Answers](#) on page 371.

Defining Questions

Learn to define questions for survey.

You need to define the individual questions in the questionnaire and what answers can be given.

1. Click on **Questions** in the questionnaire's tree view and click on **New**.
2. Enter the **Question**.
3. Enter the **Question No.**. This number determines the order in which the questions are displayed in the questionnaire.

Note: Do not number the questions sequentially (i.e. 1, 2, 3) but leave gaps (e.g. 10, 20, 30 etc.) so that you can insert additional questions later.

4. The following options are available for questions:
 - **Do not display:** The question is not displayed when carrying out the survey.
 - **New section:** The question is not handled as a question but as the title of a section.

Sections allow you to structure the questionnaire. All questions in the same section are displayed at once, and you can switch between sections while carrying out the survey.

You need to enter a **Question No.** for section titles to ensure they are displayed in the right order. Enter the title of the section in the **Question** field.

- **Weighting:** A percentage value that determines how the points awarded for answers to this question are weighted in the overall points total.

For example, if you define that an answer is worth 50 points, and weight the question with 200%, 100 points are awarded for the answer when carrying out the survey.

- **Mandatory Answer:** Enable this option to determine that answering this question is mandatory.

Note: Although you can save and navigate within the questionnaire without answering a mandatory question, all mandatory questions need to be answered to finalize the survey. If a question leads to a branch in the questionnaire (see [Defining Answers](#) on page 371), the question is automatically set as a mandatory question.

5. The following options are available for the answers to a question:

- Choose one answer from a number of predefined answers (radio buttons): The **Multiple Answers** and **Edit Answer** options must be disabled.
- Select several answers from the list of available options (check boxes): Enable the **Multiple Answers** option.

You need to define answers for these two types of questions, see [Defining Answers](#) on page 371.

- Enter the answer manually: Enable the **Edit Answer** check box.
- Select a catalog value as the answer: Enable the **Edit Answer** check box and select the **Info Area** and **Field** of the corresponding catalog field.

Note: Child catalog fields cannot be used in questionnaires.

- Accept or update a field value in the record relating to the current person/company: Select the applicable **Info Area Code** and **Field**. Enable the **Edit Answer** and **Read answer** check boxes. If you enable the **Save answer** check box, any changes you make to the suggested answer are updated in the corresponding record.

Note: Values in the database are only updated if a question is actually answered. Default answers or empty answers in questions that are not answered do not overwrite the value in the database.

- Adding a new record based on the selected answers: The data required by the new record can be collected over multiple questions.

Enable the **Edit Answer** check box and select the **Info Area** and **Field** that the answer should be written to for each question. Switch to the **Add new** tab and enable the **Add Record** check box.

You can add two separate records to the same info area from a questionnaire (e.g. two activity records). Enable the **Add Further Record** check box (instead of **Add Record**) for all questions whose answers should be stored in the second record.

Use the **Default Values** field to select the default values that should be entered in the new record.

Note: If you fill in the questionnaire multiple times, a new record is added each time.

- You can enter a trigger in the **Trigger** field. This trigger is started once the question has been answered.
- **Default answer:** You can select the default answer that is automatically suggested when carrying out the survey.

Defining Answers

Learn to define questions for survey.

To define an answer:

1. Click on **Answer** in the questionnaire's tree view and click on **New**.
2. Enter the **Answer No.** and **Answer**.
3. You can define **Points** that are awarded for this answer.
4. To define that this answer should be followed by a specific question, enter the question's number in the **Follow-up question** field.

Follow-up questions allow you to define branches in the questionnaire, i.e. to ask different questions based on the answers you have received.

Note: The follow-up question's number must be higher than the current question's number. Follow-up questions are not available for questions where the **Multiple Answers** option is enabled (if a follow-up question is defined, it is ignored).

Note: If a questionnaire contains branches, ensure that a follow-up question is defined for each question or answer, and that the **Last Question** check box is enabled for the last question. If no follow-up question is defined, and the **Last Question** check box is not enabled, the question with the next highest number is automatically used as the next question.

Carrying Out a Survey

Learn how to carry out surveys.

To carry out a survey within the context of an activity:

1. Enter the questionnaire in the **Questionnaire** field of the activity (on the **Survey** tab).
2. Save the record.
3. Select **Start Survey** from the activity's context menu.

The screenshot shows a web-based questionnaire interface. At the top, there are tabs for 'Calendar' and 'Start Survey', and a search bar. The main title is 'Questionnaire Customer Survey'. Below this, the contact person is identified as Julian Eberhard. The form is divided into sections: 'Form of address' (with fields for First Name, Last Name, Tel 1, Mobile Tel., and Company), 'Address' (with fields for Postal Code, Street, City, Country, E-mail 1, and E-mail 2), 'Position', and 'Classification'. There are buttons for 'Display all questions', 'Show mandatory questions only', and 'Summary'. A 'Save' button with a green checkmark and a 'Finalize survey' button are also present. Below the buttons, there are three tabs: 'Customer information', 'Focus of interest', and 'Concrete and gravel' (which is highlighted in orange). To the right of these tabs are two radio buttons: 'Section topic' and 'Current state'. The main content area is titled 'Concrete and gravel' and contains two questions. The first question is 'Together with our partner Stranag we develop sustainable product solutions for the construction industry. Do you know Stranag?' with radio buttons for 'Yes', 'No', and 'No response'. The second question is 'Can you name a contact person for more information on our offers in the concrete and gravel area?' with radio buttons for 'Yes', 'No', and 'No response'. At the bottom, there is a progress indicator showing 'Mandatory Questions: 1 of 1' and 'Progress (depending on answers given): 3 of 13'. There are also 'Previous Section' and 'Next Section' buttons.

- Click on the **Previous Section** and **Next Section** buttons to switch between sections in the questionnaire.
 - Follow-up questions are displayed once the answer that leads to the follow-up question has been selected.
 - Click on **Show mandatory questions only** to restrict the display to only the mandatory questions. Mandatory questions are displayed in orange and indicated with an asterisk (*).
4. You can answer questions by:
- Typing the answer
 - Selecting one or more answers from the list of predefined answers (radio buttons or check boxes).
 - Selecting answers from an Aurea CRM catalog (catalog fields).
 - Select dates from the mini calendar (date fields).

5. Click on **Summary** to display an overview of the questions that have been answered. You can return to previous sections and correct the answers you have entered.
6. **Save** the questionnaire.


Depending the questionnaire's configuration, records may be added to the Aurea CRM database or existing records may be updated automatically based on the answers you entered.

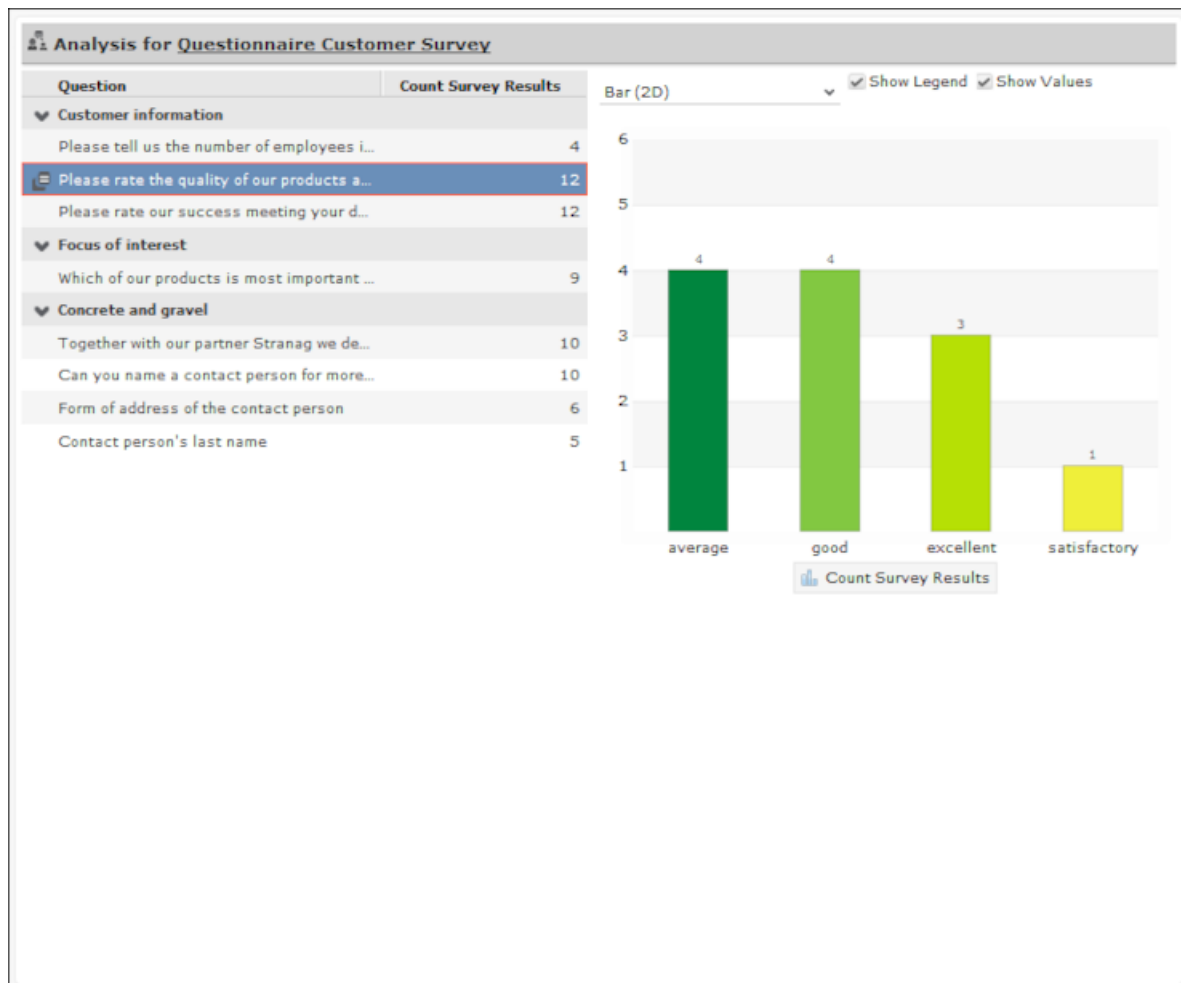
You can still edit the answers in a questionnaire that has been saved. Once you have clicked on **Finalize survey**, the questionnaire can only be edited by your administrator.

Evaluating Questionnaires

Learn how to Evaluate Questionnaires.

To display the evaluation of a questionnaire:

1. Select **Questionnaire Analysis** from the questionnaire's context menu or click on  (**Questionnaire Analysis**) in the questionnaire.
2. Click on a question to display the analysis graphically.



- The answers given to individual questions are displayed on the right (selected answers graphically, answers entered as text in a list).
- By default, answers that none of the participants gave are also displayed.

Sales Planning – ISI

The sales planning process allows you to define sales targets for a year and review them.

These targets are stored in forecast records.

The actual value of sales is calculated automatically based on completed orders. You can also import data from external systems (e.g. SAP) into the **Sales Statistics** and **Revenue Statistics** info areas, >> [Revenue and Sales Statistics](#).

Records in the **Potential** info area summarize information concerning offers and orders (number, total revenue etc.) for a company that were added in the past year. The actual values can be compared to target values, >> [Potential](#) on page 356.

Sales Planning Process

The sales planning process consists of 4 phases.

To start the process, select  (**Sales**) > **Forecast** and click on  (**Sales Planning**).

Phase 1 - Preparation

An overview of existing forecast records that have been agreed upon is displayed in the search results. New records you add for a year must be based on an existing forecast. To add a new record:

1. Enter the **Year** and **Rep** that the targets apply to.
2. Select the forecast to use as a basis in the list. The **Product Group** in the selected record is entered in the new forecast record and the **Estimated Sum** is used as the basis for calculating percentage increases.

Note: If you select multiple forecasts in the list, a separate forecast record is added for each one with the data you entered. You can add forecast records manually, see [Adding Forecasts Manually](#) on page 377. If no entry is available containing the product group you require, add the forecast manually instead.

3. Enter the target for the year, either as a percentage **Increase** on the selected entry's **Estimated Sum** or as a **Fixed value**
4. Click on **Continue with selected records** to proceed to phase 2.

Phase 2 - Detail Planning

An overview of the forecast records awaiting review is listed. Click on an entry to display its details below the list. If you entered a **Fixed value** in phase 1, this annual total is evenly divided across the 12 months/4 quarters. If you entered a percentage increase, the targets for each month and quarter (taken from the forecast record selected in phase 1) are increased by this percentage.

You can manually change the distribution of revenue throughout the year:

1. Select the desired record in the list. The monthly targets are displayed below the list. Switch to the **Quarterly** tab to display quarterly figures.
2. Switch to edit mode and edit the values for each month as necessary. If you edit a quarterly value, it is evenly distributed across the months in that quarter.

Note: Editing the targets also changes the total target for the year. The system does not check that the sum total matches the original value defined in the forecast record for the year. For example, if the yearly target was 12,000 (i.e. 1,000 per month) and you change the value of January to 0, the sum total for the year is now 11,000.

3. Once you have finished editing the targets, click on **Review** in the search header to move the selected forecast(s) to the next phase.

Phase 3 - Review

In this phase, you need to review the forecast data together with your sales manager. Click on **Agreement** to move the selected forecast(s) to the next phase.

Note: There is currently no means to return forecasts to the preparation phase in the default process. However, your administrator can add a button to the process that sets the status of the forecast accordingly.



Phase 4 - Agreement

In this phase, all forecasts that have been agreed upon are listed. The records can no longer be edited.

Adding Forecasts Manually

Learn to add forecasts manually.

To add a forecast:

1. Select  (**Sales**) > **Forecast** and click on  (**New**).
2. Enter the year and currency.
3. You can either select a product group or create a forecast for all product groups by leaving the field empty.
4. Save the record.


The monthly and quarterly figures are automatically calculated based on the corresponding orders. You can also enter targets manually.

Currencies – ISI

Aurea CRM allows you to use multiple currencies in parallel.

Values in different currencies are converted using the exchange rate table, see [Exchange Rate](#) on page 379.

There are three types of currencies:

- **Record currency:** The currency entered in a record, e.g. an opportunity or offer.
- **User currency:** The currency you have chosen in your user settings under  (**Settings**) > **User Configuration** > **Handling** tab, **Base Currency** field.
- **Corporate currency:** System-wide currency that can be used to convert currencies in records to allow values to be compared in the same currency in analyses, reports etc. When adding a new record, the **currently valid exchange rate** is transferred from the **Exchange Rate** info area and used to convert values to the

corporate currency. The **Exchange Rate** field is **not** updated automatically when the exchange rate changes.

Values in the corporate currency (i.e. in corporate currency fields) are updated in the following cases:

- Whenever the value in the referenced field (i.e. the value in the record's currency) is edited
- The currency entered in the record is changed
- Whenever the exchange rate entered in the record is updated
- Whenever the exchange rate entered in the record is deleted. The current exchange rate is transferred from the **Exchange Rate** info area in this case.
- If you select **Transfer exchange rate from table** from a record's context menu. The current exchange rate is transferred from the **Exchange Rate** info area in this case.

Note: Changes to the exchange rate in the **Exchange Rate** info area are not automatically applied to existing records.


Note: The corporate currency is available for opportunities, offers, orders, properties, service offers, service reports etc.

Exchange rates and the corporate currency are maintained by your administrator. Your administrator can also determine that a specific currency is entered by default whenever you add a record.

Example:

You have defined CHF as your user currency and your corporate currency is EUR. You add an opportunity with amounts entered in USD, and enter 100,000 in the **Total product value** field.

The following exchange rates are valid when adding the opportunity:

	Currency	Base Currency	Base Currency 2	Conversion Factor
	CHF	EUR		1,2100000
	EUR			1,0000000
	JPY	EUR		140,6000000
	USD	EUR		1,3800000


Values in the **Currency** (record currency), **User Currency** and **Corporate Currency** are displayed on the **Additional Currencies** tab:

Notes	Targets & Evaluation	Additional Currencies	Linked Elements
Currency			
Total product...	USD 100.000,00	Wtd. total pr...	USD 56.000,00
User Currency			
Total product...	CHF 100.000,00	Wtd. total pr...	CHF 56.000,00
Corporate Currency			
Total product...	EUR 72.463,77	Wtd. total pr...	EUR 40.579,71
Exchange Ra...	0,7246377		
Exchange Ra...	06.06.2014		


The date on which the exchange rate was transferred from the **Exchange Rate** info area is displayed in the **Exchange Rate Date** field.

Exchange Rate

Exchange rates need to be entered in the system in order to convert amounts between different currencies.

To navigate to exchange rate, Select  (**Settings**) > **Maintenance** > **Exchange Rate** to manage exchange rates.

Note: You need the administrator rights to access this function.

	Currency	Base Currency	Base Currency 2	Conversion Factor
	CHF	EUR		1,2100000
	EUR			1,0000000
	JPY	EUR		140,6000000
	USD	EUR		1,3800000

Currencies are converted using so-called **base currencies**.

Example: The base currency is euro. Using the exchange rate defined above, you can convert USD to euro. You can also use this record to convert from EUR to CHF, or from USD to any other currency that has an exchange rate entered for EUR.

Invoices – ISI

You can store itemized invoices in Aurea CRM web.

In most cases, invoices are imported into Aurea CRM web. You can however edit them (e.g. assign an invoice to an order).

Items in the invoice are imported for an existing invoice. An invoice can consist of multiple items.

Note: Your administrator needs to activate the **Invoice** info area for it to be accessible.

Invoices are displayed in the **Invoice** node in the company tree. Items are displayed under **Related Data**.

All invoices linked to an order are displayed on the order's **Invoice** tab.

The **Invoice** tab is displayed in the opportunity management process from phase 4 (**Offer**) onwards, see [Opportunity Management – ISI](#) on page 255. The **Invoice** node in the property tree displays the invoices linked to orders relating to the property. Orders are added to companies that are involved with the property.

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:

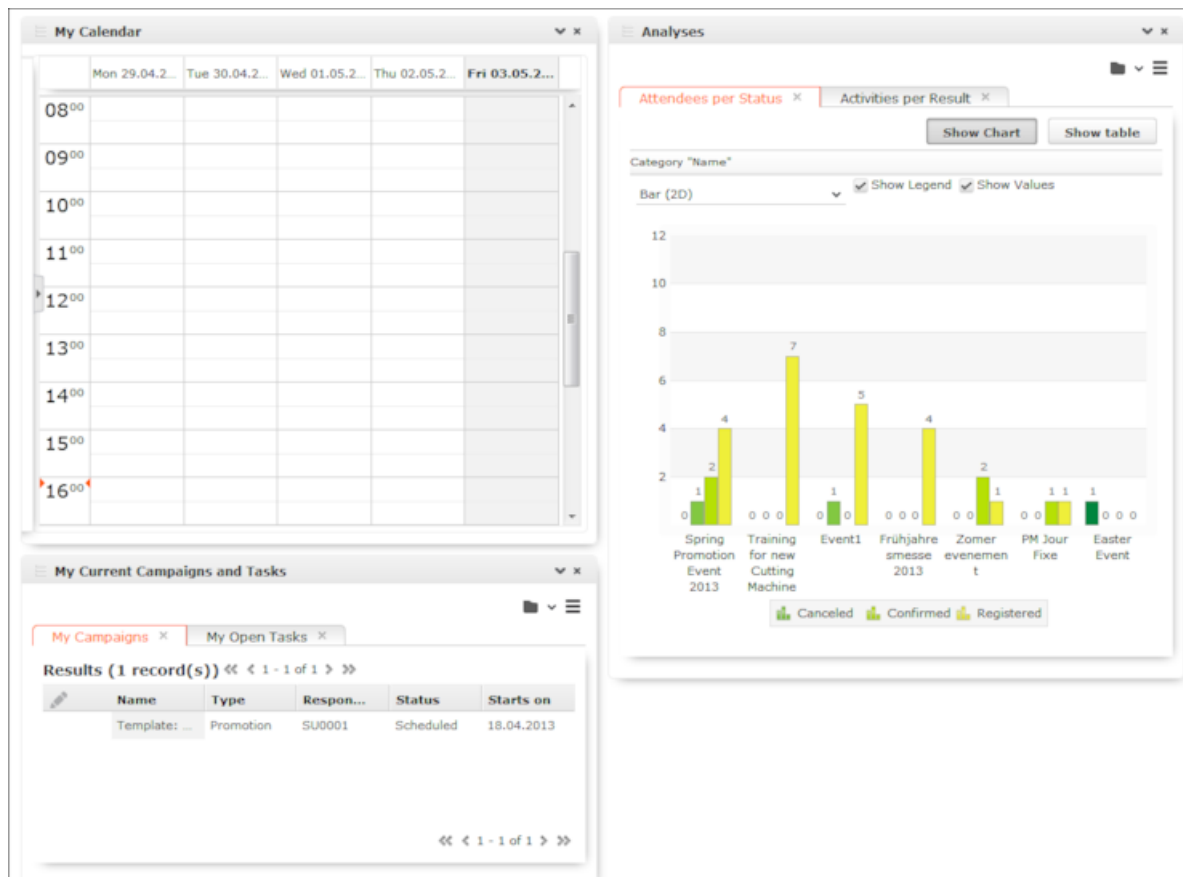
- Define customer-specific marketing activities (e.g. telephone surveys or mailings).
- Determine the responsible rep (e.g. telemarketing agent, account manager).
- Define the available responses from the target group
- Edit the generated target group
- Generate and edit activities, work orders and mailings
- Generate mass mailings and faxes
- Send SMS and e-mails
- Trigger follow-up marketing activities automatically based on responses
- Monitor the results

Marketing Starting Page

The marketing start page is available to marketing reps and displays the most important areas relating to campaign management.

To open the marketing start page:

1. Select  (**Marketing**) > **Marketing Dashboard**.



The start page displays the calendar, your current campaigns and tasks, and analyses of participants and activities.

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, see [Adding Info Areas](#) on page 105.

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, see [Selecting Multiple Records](#). 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 are informed of which marketing activity the letter was linked to. You can click on the link in the message to open the marketing activity.


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, see [Defining Marketing Activities](#) on page 385.

Adding Campaigns

To add a new campaign:

1. Select  (**Marketing**) > **New Campaign**.
2. The following options are available:
 - **Empty Campaign:** Creates a new campaign.
 - **Use Template:** Copies the data from an existing campaign template, see [Campaign and Marketing Activity Templates](#) on page 396. 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.

1. 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.

2. Save the record.
3. Add the marketing activities that make up the campaign, see [Defining Marketing Activities](#) on page 385.

Note: If you delete a campaign, all marketing activities, agenda items and equipment linked to the campaign are also deleted.

Marketing Activities

Learn about marketing activities.

Marketing activities are executed in the following steps:

1. Preparation, see [Planning and Preparing Marketing Activities](#) on page 384.
2. Define the marketing activity and any additional information, see [Defining Marketing Activities](#) on page 385.
3. Create the target group, see [Creating Target Groups](#) on page 390.
4. Edit the target group, see [Editing Target Groups](#).
5. Generate and edit the data, see [Executing Marketing Activities](#) on page 391.
6. Monitor the results, see [Monitoring Results](#) on page 392.

Related marketing activities can be grouped together to form campaigns. For further details, see [Campaigns](#) on page 382.

Planning and Preparing Marketing Activities

This topic defines the steps for planning 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.
 - Survey: A questionnaire is sent by e-mail and the answers are automatically saved in Aurea CRM. The survey is filled out by the appropriate rep if the survey is carried out by telephone.

2. Create the target group using a query, see [Queries](#) on page 100.

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, see [Adding and Editing Templates](#). 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.
7. When planning surveys (via telephone or e-mail), you need to add a questionnaire, see [Defining Questionnaires](#) on page 369.

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

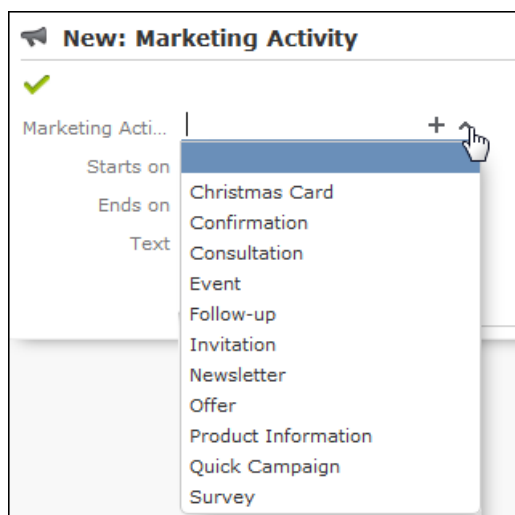
This topic explains how to define marketing activities.

To define a marketing activity:

1. Select  (**Marketing**) > **New Marketing Activity**. 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 see [Adding and Editing Templates](#). 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, see [Responses](#).
 - Reps, see [Reps](#).
 - Details on how the activity is executed, see [Defining How the Marketing Activity is Executed](#).

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.

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, see [Editing Target Groups](#).

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 work orders
- 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, see [Queries](#) on page 100.
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; settings for surveys sent out in e-mails.
- **Activities:** Details on the generated activities and information on surveys
- **Mailings:** Details on the generated mailings
- **Work Order:** Details on the generated work orders

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, see [Mail Merges](#) on page 315.

- **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 work orders 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. Work orders contain tasks to be executed within the scope of regular customer appointments. Mailing records provide a log of mailings, the responses and the results of a letter or e-mail.
 - 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, see [Planning and Preparing Marketing Activities](#) on page 384. 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 is 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

Learn to create target group.

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 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 does not add the record to the target group a second time.

Executing Marketing Activities

Learn to execute 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 work orders 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, work orders and mailings as necessary, >> Editing Generated Records on page 271.
- 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

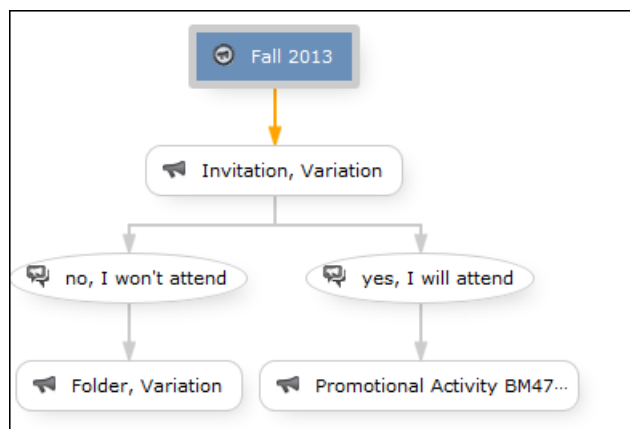
the response in the **Result** field in the response is transferred to the activity or mailing.

- If carrying out a survey is part of executing the activity, call the appropriate person, select **Start Survey** from the activity's context menu and complete the questionnaire, see [Carrying Out a Survey](#) on page 372.
- 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

Learn to view campaign graphically.

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

Learn how to monitor the results of campaigns.

You can monitor the success and status of campaigns and marketing activities by performing calculations. To do this, 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.

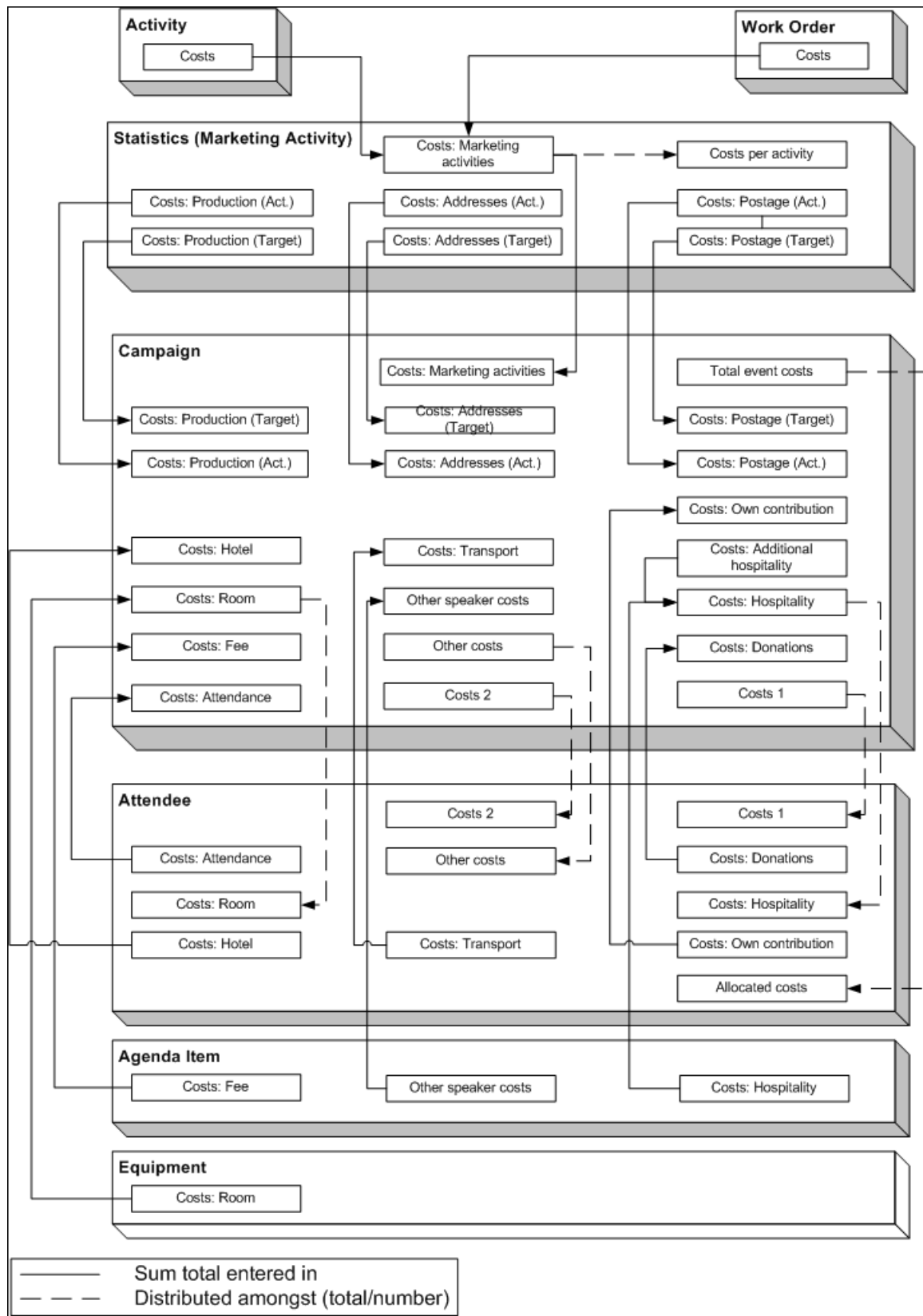
The statistics for a marketing activity are available from the **Statistics** tab and contain information on the number of responses, the points scored and statistics concerning the records generated within the scope of the marketing activity. You can edit the **Weighting** field in the statistics to 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, 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.

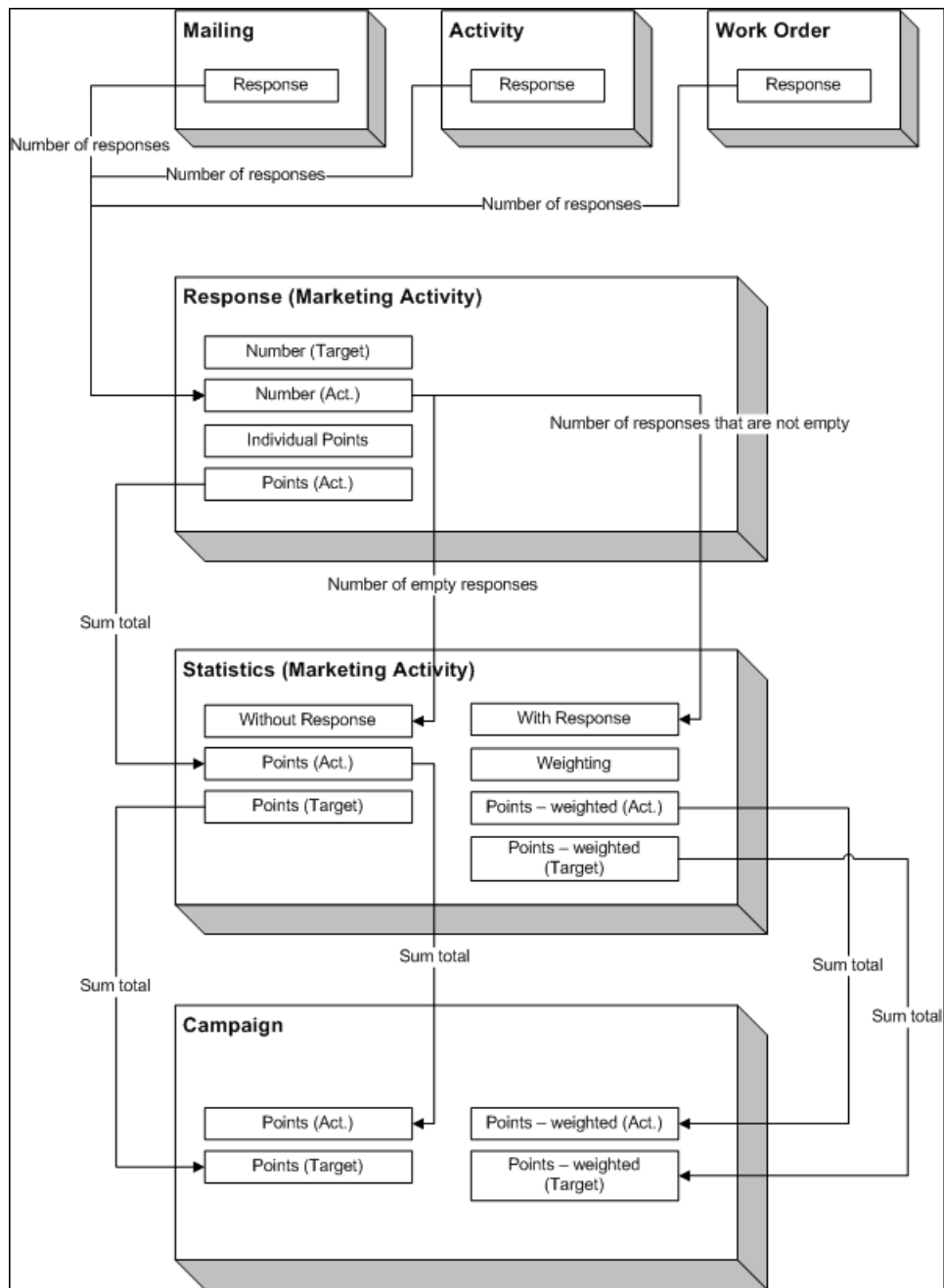
Costs



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 fails.


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, see [Adding and Editing Templates](#).

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:
 - You can edit the text.
 - You can add additional fields to the document (**Mailings** tab, **Insert Merge Field** option).
 - HTML files may contain additional fields in comments.
 - Save the document locally.
 - 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), see [Documents](#) on page 312.

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.