

LSI 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, envi- ronment 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.	
Italic Fixed-width	<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.	
Italic serif	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 description indicate that you only have to enter the underlined part of th command or parameter name. For example, if you use the <u>-LOGFILE</u> parameter in a command, you only need to enter -LOGF.	
[]	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 athttps://help.aurea.com/crm/#.

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

1 General Functions

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

Below topics explain the general functions:

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 fullyfledged CRM solution. The data displayed by the system depends on your role. Access rights are defined by your administrator.

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

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

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

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

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

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

Login

Logging in to your Aurea CRM.

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, see Changing Passwords on page 62.

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.

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 Roles

Your administrator can define roles and assign specific access rights to them, >> Roles and CRM Processes on page 18. 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.

Login to Aurea CRM web		
Enter your user name a	and password.	
User Name Password	stephen	
Less Options		Log In
Language	English	~
	Change telephone	profile
	Select roles	

 Enable Select roles and click on Log In. The dialog used to select your roles is displayed.

Log in to Aurea	CRM web
Select Settings	for this Session
Login role(s):	🖌 Marketing
	Schreibgeschützt (Sales)
	Sales
	Service
	Select all
	OK Cancel

- 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, see **System Information** on page 62.

To change your telephone profile:

1. Click on **More Options** on the **Login** page. Further options are displayed.

Login to Aurea CRM web				
Enter your user name a	and password.			
User Name Password Less Options	stephen	Log In		
Less options		Log III		
Language	English	~		
	Change telephone	e profile		
	Select roles			

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.

Login to Aurea CRM web					
Select Settings for this Session					
Phone Profile: Stand	lard_tel_prof_u8	~			
	ОК	Cancel			

- 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 Au 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 are unable to edit data in these areas.

Note: Certain administrative functions can also be assigned to user roles. These additional functions are **not** described in this manual. For more details, 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. For example, you may need to add activities for your colleagues in the field as part of your duties. Depending on your role, you might only be able to view activities added by a service rep for a contact person in a ticket, even though you can normally also edit activities. In such cases, you also only have read access to all the activity's related areas as well.

Info Areas

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

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

Info areas can be independent (i.e. have no parent info areas, such as the **Company** info area) or be a child of another info area. Records in child info areas must always be added to a record in the parent info area, e.g. an activity must always be added for either a person or company. For further details, see Adding Records on page 77.

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 \oplus (**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)

Au	E ZUMTOBEL AG			Qr Search	
<u>au</u>					
⊕ ≜	360° View: ZUMTOBEL AG	Telephone Website E-mail	Lead Priority Sector Rep. <u>Simon Seller</u>	Address Höchetents 8 6830 Dombirs Austria	<u></u>
10 Ji 🖗 🖿		Overview Company 204T086LAG Synonym Rep Simon Seller	n ID I Q, Timeline V B Customer Fact She Address Hichstento, 8 6350 Denkinn Austria	at & Company Herarchy A Potentials Telephone Fas E-mail Website	-
3 ⁶	* B Adaption (Company) (D) #g Sales Area (Company) (D) * Sale (D) * * Sale (D) * * Market (D) * * Apportanties (D) * * Opportanties (D) * * Opportanties (D) * * Apportanties (D) *	Classification Co. 70% Sector • Convenent • Convenent • Dusiness Oata Settings	ABC Customer since	Load Detes Cold Load Pronty	
ମ୍ 🖈 🕄	Sales Volume Statistics (D) Installed Bases (O) III Tickets (Contact Company) (O) III	elated Data ap * Additional Addresses * Carri ocation of ZUMTOBEL AG 3040 Vextl - Austra - Verafterg - Sontan - De		fale × Yammer × Lead Status × History ×	

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.

Au	Start Rep	Qr Starth
	Autrea Welcome to Aurea CRM, Susi User Quick Start * X Companies 2 Annons in Company @Calmoder Provides	© × ≣ © Soles Rular • × (0) opportunities this quarter
	Ny Nucl. N Mass BLABRABIS Ture 02.08.2016 Wind 02.08.2016 Price 04.08.2016 Price 04.08.2016	A II 61
© ★ P	159	d d d d d d d d d d d d d d d d d d d

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) and the configuration defined by your administrator.

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, 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 varity of functions can be executed from here.

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

Aurea CRM Menu

The following options are available in the Aurea CRM menu:

Au	🚔 Start Page	
A	C Refresh Working Area	
	🕒 Log Out	
-	💾 User Guide	1, Simor
البحرا	About Aurea CRM	

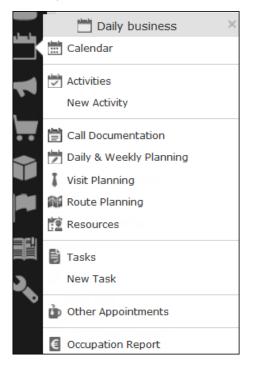
- Start Page: Switches to Aurea CRM web's start page.
- Refresh Working Area: Refreshes the current screen.
- Log Out: Closes Aurea CRM web. For security reasons, always exit Aurea CRM web using this option.

- User Guide: Opens the user manual.
- About Aurea CRM: Displays information such as the version number etc.
- Affiliation View: This option is available if your administrator has granted access to the affiliation view. For more information on the affiliation view, refer to your product-specific manual.

Navigation

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

Each menu is accessible by clicking on its icon (e.g. **1** for the **Daily business** 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).

🕲 History	×		
Pages			
New Activity			
Activities			
Sales Dashboard			
Records			
Jon Jonson			
Visit on 08.09.2014 at 09:30			
Letter on 27.07.2014 at 09:29			

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, see Editing, Viewing and Deleting records on page 83.

Favorites

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

Quick links are also displayed here, see Customizing Quick Links.

Displaying your Favorites

To view your favorites list:

1. Click on **[III** (**Favorites**). Your favorites are displayed.

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

	👚 Favorites	×
. —	* My Quick Links	* ^
3	🖩 Accounts	^
	Persons Johnson Aaron	^
77		

- 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):

	💄 Master data	×		
	Accounts	>		
a bas ba	New Account			
	💄 Persons 👝	>	🚖 Johnson Aaron	
_	New Person		An Ando	n
			AITAINO	Salutation Ms

Adding Records to your Favorites

To add a record to your favorites:

- 1. Switch to the desired record, see Searching on page 63.
- 2. Select Add to Favorites from the record's context menu.

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

Removing Records from your Favorites

To remove a record from your favorites:

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

The selected record is removed from your favorites.

Quick Links

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

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

To add quick links:

- 1. Click on **[1]** (Favorites).
- 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.

My Quick Links				
🛊 My Quick Links				
✓ Save X Reset				
All actions	My Quick Link	5		
> Accounts	New Activity			
> Collaboration	Change Passw	ord		
> Marketing				
> Sales				
> Products & Service				
Queries & Analyses				
✓ Settings Ξ				
- User Configuration				
Change Password				
- System Information				
— Info Area Rights				
- Offline Manager				
···· Start Page				
····· Refresh Working Area				
Log Out				
Add to Quick Links	Up	Down		
	Delete	Delete All		

- 3. Click on the > icon under All actions next to one of the sections. All available menu options are displayed.
- 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.
- 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 **I** (Inbox). Your inbox is opened.

My Tas	ks My Messages	My Ope	n To-Dos	My Reminder	s Syst	em -
<1.	7 of 7 🕽 🔊					New 🖉 Display All Record
P	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
						≪< < 1 - 7 of 7 >

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 mar

- 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.

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 Favorites.
- From a query's results list, see Queries on page 101.
- 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:

🗮 💉 🧹 🖉 👗 Add Visit 🛛 🖧 Relationship Chart

• Some buttons, e.g. Save, are only displayed following certain actions:

🗸 Save 🛛 Ø Cancel 🛛 🚺 Copy

• Your administrator can group buttons together. For example, in Aurea CRM web's default configuration, the export functions in result lists are grouped together:

⊠ ~ 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.

Depending on the configuration defined by your administrator, 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 - 200 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.

17.10.2012 15:24: Telephone for Mr. Jonn					
🚆 Krist OY 👌 💄 Mr. Jonne Aaron					
💼 17.10.2012 15:24: Teleph	none for Mr. Jonne Aaron (Krist OY)				
🔋 Menu 🖋 Edit 🕑 Save 🛛 💥 Cancel 💋 Recurrence 🖂 Send as E-mail 🏥 Copy 🔮 🔤 🤮					
Activity Type 📞 Telephone					
Date 17.10.2012					

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, see Searching on page 63.

Ghost Text

For some fields, so-called ghost test 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:

Name First name, Last Name

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 **Q** (**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.

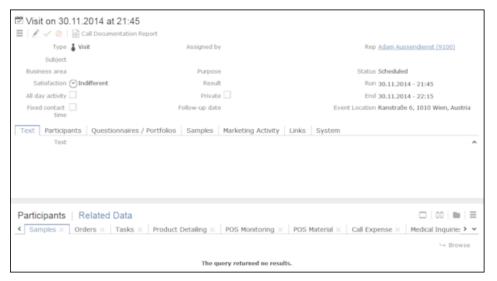
Views

There are various views available in Aurea CRM web:

• Tab View

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 a visit:



The record is displayed in the upper area. You can edit the data and export the record. The breadcrumb trail is also displayed, see **Breadcrumbs**.

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. Depending on the info area, the following areas are available:

- Participants: Displays the persons and accounts involved in an activity.
- Parent Data: All parent records are displayed here.
- **Related Data:** Displays information on related areas. For example, you can view all activities stored for a person.

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 groups and tabs below.

Example:

👗 Ms. Leena Lehtolainen			
🗮 🖋 🗸 ⊘ 👗 Add Visit	60 Relationship Chart		
 Overview 			$(\cdot \cdot)$
Name Ms. PhD Leena Lehtolainen	ABC	Source Personal Contact	\bigcirc
Departm Marketing	Rep	Date of	
Function	Position		
Job Title			
✓ Comment			
Contact Photo	Speaker		
Telephone	E-mail	Exclude	
Mobile T	Last Acti	Exclusio	
Home of	Preferre	Label	
Fax	Language		

You can change each tab's position using drag&drop, for example drag the **Contact** tab to the right of the **Photo** tab to move it:

Photo	Contact	Speaker
-------	---------	---------

You can also drag a tab to the upper area to display the contents of the tab as a group, e.g. dragging the **Contact** tab to the upper area changes the display as follows:

Leena Lehtolainen		
≡ 🖍 🗸 ⊘ 🖡 Add	Visit 🖧 Relationship Chart	
 Overview 		
Name Ms. PhD Leen Lehtolainen	a ABC	Source Personal Contact
Departm Marketing	Rep	Date of
Function	Position	
Job Title		
 Comment 		
 Contact 		
Telephone	E-mail	Exclude
Mobile T	Last Acti	Exclusio
Home of	Preferre	Label
Fax	Language	
Photo Speaker	-	

When moving a tab, the gray area indicates the tab's new position; release the mouse to place the tab here:

Photo	Contact	Speaker
Pho	oto Photo	

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

• Tree View

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; e.g. you can view all the orders stored for an account, and in turn all of the items in these orders.

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.

To display the tree view, sSwitch 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, see **Breadcrumbs**.

Example: Tree view for an account:

Apotheke Zum schwarzen A	Addre Hauptplatz 11 3910 Zwettl Austria	Telep Websi E-mail <u>demo@mycust</u>	Accou Pharmacy Accou New Key A	<
Apotheke Zum schwarzen Adler Persons (0) Activities (0) Relationships (0) POS Monitoring (0) Relationships (0) Relationships (0) Relationships (0) Relationships (0) Redical Inquiries (0) Redical Inquiries (0) Reference (0) Relational Addresses (0) Requests for Change Bulletin Board (0) Requests (0) Requests (0) Response (0) Response (0) Requests (0) Requests (0) Requests (0) Response	 Address Address Address Hauptplatz 11 3910 Zwetti Austria Geo-coordinates Latitude 48,60380 Longitude 15,16837 	Telepho Fax E-mail <u>demo@my</u> Website 94 (Geo-	n C. Timeline C Show in Bing Map Brick No. Brick MicroBri No. MicroBri Updated 20140227130935120 coordin	6
	Overview Classification Additi Custom Group Store type Payment method Currency EUR ABC -	ional Info Sunshine A No. of employ No. of beds Target Account name pool Classifi	ct Report Comments Admin Payment term Account 10002-14152 No. Ext. account no. Price List	
	Related Data	Activities × Yamm	□ 00 er ×	a Ξ

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 84.

• Quick View

The **Guick 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. To open quick view, do any of the following:
 - Click on 🗳 (Quick View) in a list.
 - Click on a link in a list or on a tab and keep pressing the mouse button ("long click").

Krist Intl. OY		□ × □
🛱 Krist Intl. OY 💙		
Tab View Tree View Analysis: Buying Frequ Analysis: Contact Frequ	Compa Krist Intl. OY Street Mannerheimintie Postal 00120 145 City Helsinki Country Finland	Persons
Remove from Favorites Copy Link to Clipboard	Address Type Classification Event Cou Are Tele 003891234 Fax E-m E-m	\$ Opportunities
Merge with	Rep <u>Miranda</u> Rep <u>Miranda</u> Web <u>Meyer</u> <u>Meyer</u> . Label Andis Label	% Offers
Go to All Related		Orders
		Installed Bases
		Service Contracts
	× >	Tickets

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.

Breadcrumb Trail in the Quick View

The breadcrumb trail is also available in the quick view:



• Click on win the breadcrumb trail to and select an info area to display all records added for the current record in that info area. The child records are displayed.

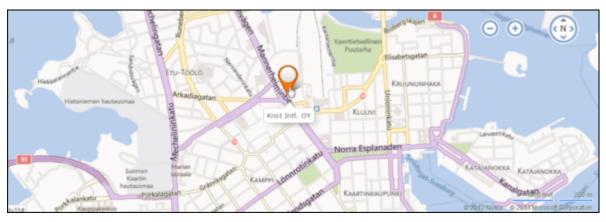
Krist OY									
🛱 Krist OY 🔺									
Persons in Compa	any շի	n –							
Activities	Ϋ́.								
S Opportunities									
% Offers									
Crders									
🐱 Installed Bases									
Q Service Contracts	s								
Tickets									
📲 Sales Group									
Document Links									
Persons in Company									
🖡 Krist OY 👻 🔪 🚨 Persons in	n Company								
Display All Records	1	Last Name	First N	Function	Departm	Area Code	Те	Com	
		Aaron	Jonne	CEO	Management		1	Krist	j
		Krist	Leena					Krist_	1

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

Map View

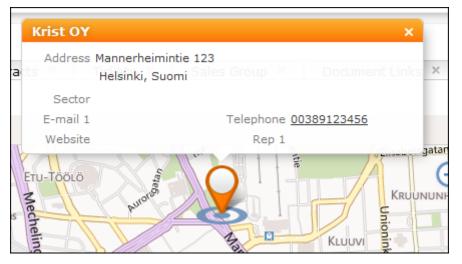
Your administrator can define that locations are displayed on a map, e.g. companies or the address of a property.

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 MiniDetails.

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

- 🗳 (Quick View): Displays the quick view, see Quick View.
- • (Display Details): Displays the record's details, see Display Details.

Result Lists

The following screenshot shows the results of a search:

📱 Search Compani	es					^
Company	kris*					
Country			/	City		
From Postal Code			То	Postal Code		
Co. Type			/	ABC		
Rep		2	2			
+	Add more		/	With me		
max. 15 🗸 Records pe	r page					Reset Start Search
Search Results					li	New 🛛 🛪 🗸 🛱 Modify List Fields
J Logo	Company	Lead S	Country	P	City	Street
	Krist Austria AG	8 Cold	Austria	1040	Wien	Operngasse 17 - 21
	Krist Austria AG	8 Cold	Austria	1040	Wien	Operngasse 17 - 21
	Krist OY	Prospect	Finland	00120	Helsinki	Mannerheimintie 123

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 86.

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.

🖳 🗮 🔺 Krist Intl. OY	Custo Finland	00 Helsinki	Mannerheimintie 1	
Synonym City Helsinki		Country Finl Co. Type	land	Postal Code 00120 Sector Holzverarbeitung
E-mail 1 Website		Telephone <u>003</u> Rep 1 Min	389123456 anda Meyer	Fax 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, e.g. to indicate the status of the record. Icons can be included in fields alongside text, or entries in catalog fields can be replaced by icons.

Example: Submitted and approved expense records are colored yellow and green respectively.

Related Data

Depending on your configuration, related data may be displayed in the list, tab and tree views. Child data can be displayed in the **Related Data** area using a variety of views:

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

You can customize the view of related data, see Changing the Order of Elements on the Start Pages and in Related Data.

You can edit related data by opening the record in tab view or directly in a list, see Editing Records in List View on page 86.

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

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

A list of all child records is displayed (e.g. all persons in an account).

	arch Companie												
	Company	Krist*							Countr	γ			+
	From ZIP								To ZI	IP			
	+	Add more	Ð				Ŷ	Iter	ms I Ow	in 🛄			
ax. 1	5 👻 Records / Pag	e									Clear S	earch	Start Search
eard	h Results « « :	1 - 9 of 9 ;	> >>										n s - ¢ /
ø	Company				Lead	Count	ry	P	City		Stre	et	
	Krist Aut. AG				Cold	Finland		00147	Helsin	ki	Kruur	untie 4	
₽≡	👻 Krist Intl. OY				Customer	Finland		00120	Helsin	ki	Mann	erheimintie	145
	Krist Österreich	Holzimport	tGes.m.b	.H. 8	Cold	Austria		1040	Wien		Opera	ngasse 21	
	Krist OY				Cold	Suomi			Helsin	ki	Mann	erheimintie	123
P	ersons Activi	ties	Opporti	inities	Offers	Orde	rs Ins	talled B	ases	Service	e Contracts	Ticket	s Sales
< < 1	1 - 6 of 6 🗦 👀										lii	New 🛏 D	isplay All Record
1	Last Name	Fi	F	Depa	. A	C	ompany	E-1	n	Tel 2	Pr	ivate	Mobile T
	Saarinen	Aino				K	rist Intl. OY						
	Aaron	Jonne		Finance	s 1212	<u>0</u> K	rist Intl. Oʻr	ion	<u>ne.aa</u>		34	781318	
	Omena	Jorma		Resear	ch	K	rist Intl. OY						
	Lehtolainen	Leena		Resear	ch	K	rist Intl. OY	ee	<u>na@k</u>				

To switch between tabs:

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

Note: Your administrator can define alternative keyboard shortcuts.

Filter Masks

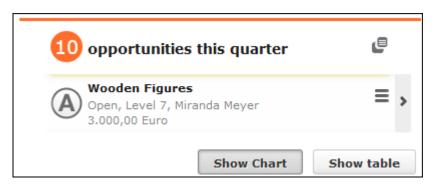
Filter masks are dynamic masks that can differ depending on the data in a record.

Filter masks can be used to differentiate between different types of records (e.g. 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 I to open the query's search results. This button is only displayed when your mouse cursor is placed over the header.

- The records returned by the query are listed on after another in the area below the header. By default, each record is displayed for a few seconds.
 - Move your mouse over the record to stop the display from switching between records. Navigation buttons (< and >) are displayed to the left and right of the record. Click on these buttons to switch between records.

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

You can display different records in separate tabs within Aurea CRM web. For example, you can add a child record using the context menu, and choose to display the input mask for the new record (or be guided through the process of adding the record) in a separate tab within the Aurea CRM web window.

Note: This option is not available for all context menu options. For example, options that simply open a dialog box cannot be opened in a new tab. Your administrator can define that menu options always open data in a new tab.

To open a record or page in a new tab:

1. Hold down Ctrl and select the desired entry from the menu or context menu.

The selected option (e.g. **Tab View**, **Timeline** etc.) is displayed in a new tab within the Aurea CRM web window.

Krist Intl. OY ×	Mr. Jonne Aaron	×	័ Search Offers	×
🛱 Krist Intl. OY				
😑 Menu 🖍 Editi 🗸 s	ave 🖉 Cancel 📗 🕻	Copy Ph	~	

2. Click on a tab at the top of the screen to switch to that tab.

If you open more tabs than can be displayed on the screen at once (the number is dependent on your screen resolution and the browser's size), use the \blacksquare (**Previous**) and \blacksquare (**Next**) buttons to scroll. Click on \blacksquare (**Show all tabs**) to display a list of all open tabs:



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

3. Click on (Close) to close the current tab.

Your administrator can define that when opening the same area again, the currently opened tab is displayed. Your administrator can also determine that the contents of the tab is refreshed when it is reopened.

Example:

The calendar is already opened in a tab. When configured accordingly, reopening the calendar with Ctrl held down does not open a new tab, but instead the existing calendar tab is displayed.

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 v and choose an option:

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

Example:

Per	sons in Compar	iy					¥ ×	E Activit	ties							~
					No.	w 🖙 Display	All Records	<< < 1 -	15 of 34	> >>				New -	Display A	II Records
1	Last N	Fir	Fu	D	Ar	Company	E	1	Tyj	St		Person	s	t Subject	t	Op
	Aaron	Jonne	CEO	Mana		12 Krist OY	jonne		Tele	07.02	12:		S	ch		
	Krist	Leena				Krist OY	leena		Tele	09.09	18:		S	ch		
									Tele	17.10	15:	Mr. Jonne	<u>A</u> S	ch		
									Tele	03.01	10:1	6: Mr. Jonne	<u>A</u> S	ch		
									Tele	07.02	14:1	6: Mr. Jonne	<u>A</u> S	ch		
									Tele	04.02	16:	Mr. Jonne	<u>A</u> S	ch		
									Tele	01.02	15:	Mr. Jonne	A S	ch		
									Tele	11.02	04:	Mr. Jonne	<u>A</u> Si	ch		
									Tele	05.08	11:	Mr. Jonne	<u>A</u> Si	ch		
									Tele	13.08	08: 0	9: Mr. Jonne	<u>A</u> Si	ch		
									E-m	30.07	15:		S	ch Bespre	chungsp	
									Tele	¢ 05	15: 1	18:	Se	ch Jour for	e	
									Tele	¢ 12	15: 1	18:	S	ch Jour for	e	
									Tele	¢ 19	15: 1	18:	Si	ch Jour for	e	
Орр	ortunities						¥ ×		Tele	¢ 26	15:1	18:	S	ch Jour for	e	
					i Ne	w 🕒 Display	All Records							00	\$ 1 - 15	of 34 🕽
1	Opportunity	/ L	e C	io i	To Cu	Res	Rep	Offers								~
	Hirvi	Le	IV	100		Miranda	Miranda	- Offers								
								-	-					New -		
								1	P	Da	s	Str To	с		Contac	a Pe
										30.0				Krist OY		
									45	11.0				Krist OY		ne Aaron
									47	08.0	Op	2.62	Euro	Krist OY	Mr. Jon	ne Aaron
									21300.	14.0			Euro	Krist OY	Mr. Jon	ne Aaro

- **b** (tabbed): Displays the areas in separate tabs.

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.

Context Menu

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

You can access the context menu in the following ways:

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

The following screenshot shows the context menu for accounts:

1		🔳 Menu	×
Ś		Open	
, d	×	Add to Favorites	
		Merge with	-
	ور	Make Call All Fields	
	×	Delete	

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, 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 v 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 \checkmark to open the drop-down list.

Country	Finland	+
	Chile	
	China	
	Croatia	
\sim	Djibouti	_
-	Ecuador	
-0-	Egypt	
	Equador	
	Finland	
	German	
	Greence	
Jases	Hong Kong	
	Hungary	
	Iceland	
E-ma	Iran-Irak	
	Irland	-

 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:

Find or Add Ca	talog Value		\times
Field Private Country of Perso	on		
Spain		Q, Find	
China			
Croatia			
Cyprus			
Czech Republic			
Denmark			
Estonia			
Finland			
France			
Germany			
Gibraltar			
New value in English:			
New value in base language German:	Geometri		
Doubschi		New	
Go to Catalog Maintenance			
	Select	Cancel	

- 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.

Sector	Testing	+ ^
		•
	Testing	
ABC	Media	
HDO	Mechanical Engineering	
venue	Catering	
Name	Banking	-
1141	Long Distance Transport	
litions	Research	
nount	Development	
	Prefab Housing	
	Window Frames	
Costs	Goods Transport	
CUSIS	Logistics	
Costs	Capital Finance	
looms	Money Transport	•

- 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, see Date Picker on page 46.

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

- Digits
- The date separator defined in your user configuration, 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, see Date Picker on page 46. 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 92.

Mandatory Fields

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

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

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

!Type !Subject	Visit	~
-	10.10.2013	~

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

Boolean Fields

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

Link Fields

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

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

End Customer Company	Krist Intl. OY	Q, <mark>X</mark>
End Customer Person	Mr. Jonne Aaron	Q, 🗙

Click on \mathbf{Q} 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 **x** (**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:

Probability (%)	30,00%
Probability (%)	-30,00%

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:

Text	Hi Martin, thanks for your feedback, it has proven invaluable!	
	Archibald Rupert-Smythe, CEO money talks software Ltd.	
	B I U S I I _x A · Normal · Font · Size · @ ∞	

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	૧ ×
City	Wien	
Country	Austria	+ ~

Field Help

Learn about the Field Help user interface.

Aurea software 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:



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.

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, 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.

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-mails

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 M (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:

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 Svendsen (doris.komarek@update.com) Simon Svendsen (susanna.pfann@update.com) CC: Miranda Meyer (miranda.meyer@update.com)		
Additional internal recipients:		0
Additional external recipients:		<u> </u>
Subject:		
Body:		
✓ Insert update.CRM web link		
Request a delivery receipt Request a read receipt		
Send Car	ncel	

- 3. The following recipients are suggested by the system:
 - Recipients: The rep entered in the record and the contact person or company's e-mail address
 - Cc: All required participants
 - Bcc: All additional participants (optional and for information)
- 4. You can enter Additional internal recipients, >> Selecting Reps on page 92.
- 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.

- 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, >> CRM.phone User Manual.

Touch Devices

You can use Aurea CRM web on 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. You 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, or display system information.

User Configuration

Settings: Learn about User Configuration.

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

Your administrator can define access to these settings.

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:

Layout	Handling	Activites	Date & Time	
	Sta	rt page Sale	es Dashboard	~

Start page: Select the start page here; i.e. the page that should be displayed after you have logged on to Aurea CRM web. You can choose to display generic pages (e.g. the company search) as well as predefined start pages (e.g. marketing home page, sales home page).

Handling Tab

Layout Handling Activities Date & Ti	me
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	
New records: Use field values from last data entry	Default (do not transfer the last input)
Save history	
Remember last search criterion for queries and analyses	×
Activate browser on incoming call	×
Display the administrator information in the field help	
Remember search and filter criteria based on last user in	×

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, 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, 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 Activites Date & Time	
Start of work day (hh:mm)	08:00
End of work day (hh:mm)	18:00
Collision check	×
Min. length of displayed activities	5
First year in date picker	1900
Last year in date picker	
First week of the year must contain	4th January 👻
Number of days selected when selecting a week	5
Items displayed in the calendar sidebar	✓ My Next Activities
	My To-Dos
	✓ My Next Tasks
	V 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 calenda	r no value 🗸
Date forma	t Server 🗸
Date separato	r Server 🗸
Year forma	t Server 🗸
Time forma	t Server 🗸
Time separato	r Server 🗸
Decimal separato	r Server 🗸
Digit grouping symbo	Server Y
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 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	•••••
Ch	ange Password Cancel

- 2. Enter your current password in the **Old Password** field and enter and confirm your new password in the fields below.
- 3. Click the **Change Password** button. A message appears informing you that your password has been changed successfully.

System Information

Settings: Learn about System Information function.

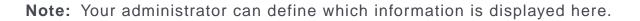
Use the system information to access information such as your user name, rep and database version. If you are experiencing problems with the system, you can mail this information directly to the e-mail address specified at the bottom. The text field allows you to describe the problem in greater detail.

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

- 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)] [L	IPDATE DEFAULT Offline (#6)) [UPDATE DEFAULT (#0)]	
Phone Profile	Standard_tel_prof_u8		
Language	English (language eng , sub language 200)		
Browser User Agent	Mozilla/S.0 (Windows NT 5.1; rv:16.0) Gecko/20100101	Firefox/16.0	
Active Sessions	634		
Server Path	http://updevweb02.update.com:80		
URL Path	http://updevweb02.update.com:80/update.web/v8.sp0/v00.x64/bb/		
Application Path	/update.web/v8.sp0/v00.x64/bb/		
Document Path	C:\inetpub\wwwroot\update.web.v8.sp0\v00.x64\bb\web\\web.data\upload		
Version	BTBi 8.0.407.46277 (MSSQL)		
web Version	8.0.1511.46319		
Date Format	%D.%M.%Y		
Time Separator			
Decimal Separator			
	BTBi 8.0.407.46277 (MSSQL)		
Patches			
Plug-ins	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.



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 (Master Data) > Accounts):

Account name A	ccount name, Synonym	Account type	+ ~	Stre 🏷 Clear Search Criter Settings
City		From PC		MicroBrit D Reset Search Settings
haracteristic	+ ~	Classification	~	Key Account
Characteristic	Ý			
+ A	dd more V			

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

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

Search Accounts	▼ System Company

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 allows 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 includes "Aurea software". 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, see Handling Tab.

5. Click the **Start Search** button. The results of your query are displayed in the results list below the search area, see **Results List** on page 72.

Adding Additional Search Fields

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

1. Click on v next to Add more.

Search Persons in Company		
Name	First Name, Last Name	
Department		+ ~
+	Add more	^
Max. 20 💙 records per	Add more	
Max. 20 • records per	Function	
	Position	
	Priority 🖑	
	E-mail addresses	
	Phone Numbers	
	Last Activity	
	Interest Group	
	Person Type	
	More Fields	
	More Filters	

- 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.

ect I	ect Fie	ield						C	×
rch F	rch Fiel	eld Name		٩					۵
-		eld Nam	e				Field Ty	ре	_
C	Cou	untry					Catalog		
C	Cou	unty					Text		_
5 C	5 Cre	eated at					Time		H
0 0	0 Cre	eated by	ID				Numeric		
1 C	1 Cre	eated in	Module				Catalog		
0 C	0 Cre	eated on					Date		
5 C	5 Cur	rrency					Catalog		
D	Date	te of Birl	:h				Date		
3 D	3 Del	ICd.					Boolean		
D	Doc	cument	L				Text		
D	Doc	cument :	2				Text		
E	E-m	mail					Text		
E	E-m	mail 2					Text		
-							B 1		Ŧ
E	E-m		~ ·			Арг			Cancel

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 aaror	jonne aaron				
Departmen		+ ~				
-	Add more			~		
Max. 20 👻 records pe	r 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 P	ch Persons in Company					
Name Department		jo,aar				
			+ ~			
	+	Add more			¥	
Max. <u>20 ¥</u> re	ecords per	page				
Search Res	ults					
🖉 🕹 Las	st Name		First Na	Function	Department	
Aar	on		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.

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 86. Child records related to the selected record are displayed under **Related Data**, see Editing Records in List View on page 86 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.

```
+ Filter: Companies in Vienna 🔹
```

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.



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

Defining Filters

To define a filter:

The Filter dialog is displayed.

Filter		
Filter Custom Filter*		^
🔍 Load 🗹 Save 🕀 New 🗙 Delete		
Filter name:		
✓ UQL Syntax		
select from (MA)		
✓ Formatted		
Add Info Area [X] Group AND]X[Group OR		
∃ Activity		
+ Conditions		
		-
	Apply Car	cel

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

You can define filters in two ways:

- As AQL (Aurea Query language) in the **AQL Syntax** field. For more information on the AQL syntax, >> Aurea CRM web Administrator Guide.
- Using the graphical user interface to select fields and enter filter criteria. This method is described in this manual.
- 3. Select Add Condition from the info area or condition's context menu to define a condition.

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

Select Field(s) in Info Area: Activity				
	the field in the Action	vity info area to add to your condition: Q	\$	
No.	Field Name	Field Type		
0	Туре	Catalog		
1	Status	Catalog	H	
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	-	
		Next Cancel		

- 4. Click on a column heading to sort the list by the entries in that column.
- 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):

Value(s) of Type in the	Activity Info A	rea	>
Enter a condition for the Type field in the Activ Field Type = (equal) <> (not equal) Value: Fixed Field Available Fields	rity info area. Selected Fields		
Telephone Letter Event Fax E-mail Info Internet Social	Visit		
	Previous	ОК	Cancel

- 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:

Filter		×
Filter Custom Filter* Q Load ✓ Save ⊕ New × Delete		4
Filter name:		
✓ UQL Syntax		
<pre>select from (MA) where (Contact='#1')</pre>		
✓ Formatted		
击 Add Info Area [X] Group AND]X[Group OR		
∃ Activity		
Type = "Visit"		
		Ŧ
Apply Can	cel	

10.Define any additional conditions:.

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 (which info areas the quick search applies to is defined by your administrator):

Q- Search

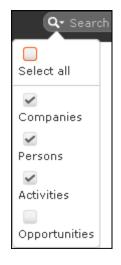
To start the quick search:

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

Q- Krist
Companies (5+) Krist Intl. OY, Helsinki, Finland Krist A OY21-17, Helsinki, Suomi
Krist Aut AG, Wien, Austria Krist Aut. AG, Helsinki, Finland Krist OY, Helsinki, Suomi
Persons (2)
Kristus, Krist
Kirsi, Krist
Activities (0)

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 **Q** 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.

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

ies					^
kris*					
	,	~	City		
		То	Postal Code		
			ABC		
		2			
Add more		/	With me		
r page					Reset Start Search
				6	New 🛛 🖼 🗸 🛱 Modify List Fields
Company	Lead S	Country	P	City	Street
Krist Austria AG	8 Cold	Austria	1040	Wien	Operngasse 17 - 21
Krist Austria AG	8 Cold	Austria	1040	Wien	Operngasse 17 - 21
	kris* Add more ar page Company Krist Austria AG	kris*	kris* v Add more Add more r page Company Lead S Country Krist Austria AG & Cold Austria	kris* City To Postal Code ABC Add more With me Add more With me r page Country P Krist Austria AG Cold Austria 1040	kris* Kris* City To Postal Code ABC Add more Add more Krist Austria AG Country P City City City Country P City Nen City City City

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

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, 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.

Au	Search Cor	npanies					Q • Search	
	_							-
	Search Co	ompanies	;					÷ ^
		Company	Company, Synonym			Country Add a value		~
		From PC				To PC		
		+	Add more		~	With me		
•	Max. 15 🗸	records per p	bage					Start Search
	Search Re	esults					÷	
	1	Company		Lead Status	Country	Postal Co City	Street	Show deleted
	₽ = ×	Company S	Super User	Cold				records 🕞
		FiberOptik	gmbh	Cold	Hungary			_
▲		NanoMasc	hinen gmbh	Cold	Germany			
		Schwerme	tall Stück gmbh	Cold	Switzerland			
		Semantic I	Inc	Cold				

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.

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

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

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

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

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

Changing Column Order

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

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

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	Street
1030	Vienna <u>+43(±) 7876464</u>	Paniglgasse 3
1040	Vienna <u>+43(1) 8784543</u>	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	e ∢∣ -£ity ^
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:

	Mod	lify I	List	Fields		
Select Info Area Person		~		Default	~	
Available Fields Field Name				Output Fields		
0 - PE-StaNo				4 - First Name		
1 - PE-SerNo		=	+	3 - Last Name		
2 - Form of address			+	7 - Postal Code		t
3 - Last Name			-	8 - City	Ξ	1
4 - First Name			e	6 - Country		
5 - E-mail				13 - Private Tel.		
6 - Country				5 - E-mail	*	
7 - Postal Code				Sort by	.=	
8 - City			+	3 - Last Name	t≣	t
9 - Street		Ŧ	-			T
•	Þ		e			*
By No. Alph						
Reset				ок	Cancel	

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 v to display a list of the linked info areas:

Select Info Area	
Person	շ իտ
Person	Ų
-Linked Info Areas	
Country	
Rep	

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.

	Modify List Fields	= ×
Select Info Area Person	✓ Default	^ N
Available Fields	Default	-12
Field Name	1. PE-StaNo,PE-SerNo -> PE_1_StaNo,PE_	1_SerNo
0 - PE-StaNo	2. PE-StaNo,PE-SerNo -> PE_2_StaNo,PE_	2_SerNo
1 - PE-SerNo	3. PE-StaNo, PE-SerNo -> PE_3_StaNo, PE_	3_SerNo
2 - Form of address	126. 'KM', PE-StaNo, PE-SerNo -> Link to In	fo Area,Link_StaNo,Link_SerNo

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 t (**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 (1=) or descending (1=) order by default. Double-click on a search field to change the sort order.

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

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

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

Adding Records

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 Account**) or using the **New** button in the list view. The mask used to add new records is displayed.

In certain info areas, such as **Account** or **Person**, Aurea CRM web matches up new data with existing records to prevent duplicate records from being added to Aurea CRM's database, see Match-up on page 82.

Example: Adding a new marketing account

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

- 1. Select (Master Data) > New Account from the menu to open the search area.
- 2. Click on Search.
- 3. Click on \oplus (New)in company search's results list.

The New: Company page is displayed.

New: Acco	unt				
 ✓ Ø 					
• Overview *					
Account name	Krist OY				
Account type	Day clinic 🗙 🛛 + 👻	Account status	New + v		
Account name					
Key Account		Synonym			
 Address 					
Street	Mannerheimintie 123	Telephone		Brick No.	
Postal Code	Q, 🗙	Eav		Brick	
City	Helsinki			DITUK	
			info@krist.fi 🛛 🗷	MicroBrick No.	
	+ ~	Website	6	MicroBrick	+ ~
!Country	Finland + v				
Classification	Additional Info Co	mments G	eo-coordinates Admin		
Specialty	Add 3 more		+ ~	Price List	+ ~
Customer Gro	+ ~	No. of employ		Payment term	+ ~
Store type		No. of beds		Account No.	
Payment met		Target		Ext. account n	
Currency		Account name			
ABC	-	Classification	- •	-	

- 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 82.

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. contact times) can be added in two ways:

• From the parent record: Adding Child Records in the Tree View.

You can add new child records in the tree view of a record (e.g. a person) using the child info area or child records' context menu (e.g. a contact times).

As the parent record is uniquely identified, the input mask is displayed immediately. Proceed as with independent records, see, Adding new Independent Records.

Example: Adding new contact times for a person in the tree view

To add new contact times for a person:

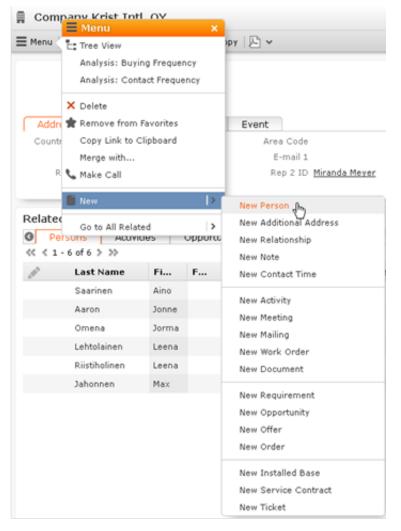
- 1. Switch to the desired person in the tree view.
- 2. Click on the **Contact Times** node in the tree.
- 3. Click on \oplus (**New**) in the results list.
- 4. The new record mask is displayed.

new: Phor	ne availability			
×				
Туре	Reachability 🗸 🗸	Morning from	Morning to	
Weekday	~ ~	Afternoon from	Afternoon to	
Rep	9			
Comment				

- 5. Enter the data.
- 6. Click on Save. The record is displayed in the tree view.

• In the tree view of the parent record: Adding Child Records from the Parent Record

If you are currently viewing a parent record (e.g. a company), you can use the context menu to add a new child record, e.g. a new person or activity.



As it is clear which record is the parent record in this case, you are immediately switched to the mask where you can enter the new record's data. Proceed as with independent records, see Adding new Independent Records.

Example: Adding a new Person within a Company

To add a new person to a company:

 Select New > New Person from the company's context menu. Alternatively, click the New button in the list view when displaying all the persons in a company. The New Person mask is displayed.

Form of address Mr.	~	Title	+ ~
First Name Jonne		Last Name Aaron	
Tel 1	ور	Mobile Tel.	e.
Address Position Classification			
Postal Code		City	
Street		Country	+ ~
E-mail 1	833	E-mail 2	

- 2. Enter the person's data.
- 3. Save the record. The record is displayed in the default view.

Adding new Records Supported by a Process

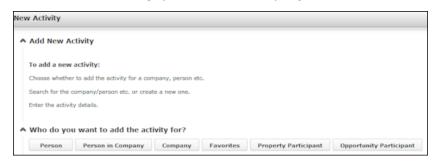
You are guided through the steps of adding new records in various info areas, in particular if new records cannot be added directly due to a lack of information. For example, an activity can only be added if a company or person has been selected.

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.



3. Choose 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.
- 5. Enter the desired data, for example any additional participants.

0										
emplate name	<u> </u>	c	2, ×							
IType	Visit		~	Rep	SU0001	1	Purpose	Support		,
(Subject				Assigned by	SU0001	1	Result			~
Starts on	10.10.2013		~	Status	Scheduled		Satisfaction	Indifference	ent	v
Starts at	17:32									
Ends on			~	Priority	* * *		Follow-up on			`
Ends at										
I continue										
Location										
Private										
Private		ntent	Age	nda Items	Survey	Products	Marketing Activi	ty Du	ration & Costs 0	
Private Internal P								ty Du	ration & Costs O	
Private Internal P anage your c	articipants & Co company's interr	al partic	ipants					ty Du	ration & Costs	
Private Internal P anage your c	Carticipants & Con company's Intern Required	al partic	ipants × Ad	s here. Extern				ty Du		ė.
Private Internal P	Carticipants & Con company's Intern Required	SU0001 Add a va	ipants × Ad	s here. Extern				ty Du		10 S
Private Internal P anage your c Participant(s)	larticipants & Co company's interr Required Optional	SU0001 Add a va	ipants × Ad	s here. Extern				ty Du		ė.
Private Internal P anage your c	larticipants & Co company's interr Required Optional	SU0001 Add a va	ipants × Ad	s here. Extern				ty Du		ė.
Private Internal P anage your c Participant(s)	larticipants & Co company's interr Required Optional	SU0001 Add a va	ipants × Ad	s here. Extern				ty Du		ė
Private Internal P anage your c Participant(s)	larticipants & Co company's interr Required Optional	SU0001 Add a va	ipants × Ad	s here. Extern				ty Du		e
Private Internal P anage your c Participant(s)	larticipants & Co company's interr Required Optional	SU0001 Add a va	ipants × Ad	s here. Extern				ty Dur		ė
Private Internal P anage your c Participant(s)	larticipants & Co company's interr Required Optional	SU0001 Add a va	ipants × Ad	s here. Extern				ty Du		ė
Private Internal P lanage your c Participant(s)	Participants & Co ompany's interr Required Optional For Information	Add a va	Ad	s here. Extern	al participan	ts are managed				ė.

6. 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, see **Navigation Bar**.

	following records alrea	dv exist:								
	sults (9 record(s)		> >>							
ø	Company	Country	Postal Code	City	Street					
	Krist	Finland	00120	Helsinki	Mannerheimin Tie					
	Krist									
	Krist A OY21-17	Suomi	00120	Helsinki	Mannerhiemintie					
	Krist Aut AG	Austria	1040	Wien	Operngasse 17					
	Krist Aut. AG	Finland	00147	Helsinki	Kruununtie 4					
	Maint Aut. A.C.	Austria	0000	0.000	ApponetroRo 24E					
0	The new record is not created. Complement existing record Select this option to enter data from the new record in empty fields in the existing record. The existing record is retained and the new record is not added. Update existing record Select this option to transfer all the data entered in the fields of the new record to the existing record; i.e. the existing fields are overwritten if new data is entered. The existing record is retained.									
0	Select this option to e existing record is reta Update existing record Select this option to tr record; i.e. the existin retained. Update new record wi	nter data from the ined and the new d ransfer all the data ng fields are overv th existing data	record is not added. a entered in the fields of written if new data is ent	the new record to ered. The existing r	the existing record is					
0	Select this option to e existing record is reta Update existing record Select this option to tr record; i.e. the existin retained. Update new record wi	nter data from the ined and the new d ransfer all the data ng fields are overv th existing data	record is not added.	the new record to ered. The existing r	the existing record is					
0	Select this option to e existing record is reta Update existing record Select this option to to record; i.e. the existin retained. Update new record wi Select this option to c created. Complement new reco	nter data from the ined and the new d ransfer all the data ing fields are overv th existing data opy all the fields in ord with existing d nter data from the	record is not added. a entered in the fields of written if new data is ent n the existing record to t	the new record to ered. The existing r the new record. A r	the existing record is new record is					
0	Select this option to e existing record is reta Update existing recorn Select this option to tr record; i.e. the existin retained. Update new record wi Select this option to c created. Complement new rec Select this option to e	nter data from the ined and the new d ransfer all the data og fields are overv th existing data opy all the fields in ord with existing d nter data from the ,	record is not added. a entered in the fields of witten if new data is ent n the existing record to t lata	the new record to ered. The existing r the new record. A r	the existing record is new record is					
0	Select this option to e existing record is reta Update existing record Select this option to tr record; i.e. the existin retained. Update new record wi Select this option to c created. Complement new reco Select this option to e new record is created	nter data from the ined and the new d ransfer all the data og fields are overv th existing data opy all the fields in ord with existing d nter data from the ,	record is not added. a entered in the fields of witten if new data is ent n the existing record to t lata	the new record to ered. The existing r the new record. A r	the existing record is new record is					

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

Editing, Viewing and Deleting records

Records can be edited, displayed or deleted.

You can display records as follows:

- Start the search, enter search criteria and search for the record you wish to display.
- Depending on your configuration, you can open your favorites and recent records from the navigation bar, see Favorites and History.

Persons I>	😭 Mr. Jonne Aaron
New Person	Ms. Chris Aki
	MS. CHIIS AKI
Search & E-mail Search	Mr. Jonne Aaron

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 86, Editing Records in Tab View on page 84 and Deleting Records on page 89.

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. Double-click on the record or select **Tab View** from the context menu left of the selected record.

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

3. The record is displayed in the tab view.

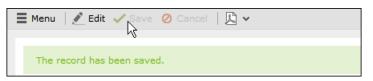
🗍 Comp	pany Krist Intl	, 0Y									
≡ Menu	🖋 Edit 🛛 🖌 Save	Ø Cance	Co	ру 🕒 👻							
	Company K	rist Intl. O	Y								
		lannerheim					Post	al Code 00120)		4
	City H	lelsinki						Country Finlan	d		
Addre	ss Type	Classifi	cation	Event							
Country	y Code			Are	a Code			1	Telephone 0038912	3456	
	Fax			E	-mail 1				E-mail 2		
Re	ep 1 ID <u>Miranda M</u>	eyer		Re	ep 2 ID 🛔	Miranda	Meyer		Website		
111											
	Label Andis Labe	el .									
Related	l Data		Innortun	ities (Offers	On	ders Install	ed Bases	Service Contract	ts Tickets	Sales G O O
Related			Opportun	ities 0	Offers	On	ders Install	ed Bases	Service Contract		Sales G O O
Related	I Data		Opportuni	ities (Offers	On	ders Install	ed Bases	Service Contract		
Related	I Data rsons Activit 6 of 6 ≥ 3>	ties (On				∎ New 🛏 Dis	play All Records
Related	I Data rsons Activit 6 of 6 > 35 Last Name	fies (0r	Company Krist Intl. OY			∎ New 🛏 Dis	play All Records
Related	I Data rsons Activit 6 of 6 ≥ ≫ Last Name Saarinen	ties (Fi Aine		Depar	A		Company Krist Intl. OY	E-m		New → Dis Private	play All Records
Related	I Data sons Activit 6 of 6 > >> Last Name Saarinen Aaron	ties C Fi Aino Jonne	F	Depar	A		Company Krist Intl. OY Krist Intl. OY	E-m		New → Dis Private	play All Records
Related	I Data rsons Activit 6 of 6 ≥ ≫ Last Name Saarinen Aaron Ornena	Fi Aino Jonne Jorma	F	Depar Finances Research	A		Company Krist Intl. OY Krist Intl. OY Krist Intl. OY	E-m		New → Dis Private	play All Records

- 4. Switch to edit mode using the following options:
 - Click on 🖉 (Edit).
 - Double-click on a field or field name in the mask. The field is automatically given focus.

- 5. You can now update the record or simply view the details in the tab view.
- 6. 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, see **Inbox**.

Buttons in the Tab View

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

This does not work if you are using unicode character sets, in which case your e-mails need to be sent by the server. If you have configured you system to send e-mails from the client, you need to write and send your Unicode e-mails in your e-mail client and add the corresponding activity records to Aurea CRM web manually.

You cannot add attachments to e-mails sent by the client.

- Click on a URL to access the company's website entered in the company record.
- Click on a 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 **Q** to link the current record **with a record in another info area.** The search dialog is opened, allowing you to search for the record you want to link to. Double-click on the desired record or choose **Select** from the context menu to confirm the link.
- Click on + (Find or Add Catalog Values) to search for or add catalog values.
- Click on (Select Date) next to a date field to open the date picker.

Editing Records in List View

Learn to edit records in List View.

To edit records in list view:

1. Click on Click 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 Q (Select) next to a link field to select a record in another info area, see Link Fields.
- 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

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.
- 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:

	Edit multiple records	\square ×
✓ Modify records		
First Name		
Last Name		
Country	Τ	+ ^
Postal Code		
City	Austria Brazil	
E-mail	China	
	Finland	
_	France Germany	=
	Italy	
	Japan	
	Norway	
	Portugal Russia	
	South Korea	
	Spain	
	Sweden	-

If all selected records contain the same value in a field, the vale 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 \equiv (Show Menu) next to one of the highlighted records.
- 3. Select Delete from the menu.

The selected records are deleted from the database.

Editing Data in Predefined Processes

Learn to edit data in Predefined Processes.

Processes consisting of a number of phases are available in some info areas to add or edit data. For example, a process has been defined for documenting visits that guides you through the steps and ensure you enter the necessary data.

A process is divided into individual phases with various tasks.

By default, the currently active phase is highlighted in orange in the header.

	Activities	Overview Q	POS Monitoring 떠	POS Material	(€) 02.04.2015 (€) Ge
۰ [111			,	
	Visit on 02.04.2	015 at 16:43			^
	Type 👗 Visit	Assigned	d by	Rep Arno Ac	lmin (9200)

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

Help texts are available for the individual phases (and possibly the entire process), and icons inform you of the current status and tasks that still need to be completed.

	Order	Product Detailing	Samples
1	the products that ha	ng" phase allows you ente ve been discussed. uct detailing items requirir	
l	displayed.		2

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 <a>(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":

max. 15 🛛 Records per page	Context:	Krist OY	^
		Entire Database	
		Mr. Jonne Aaron	
		Krist OY	

Deleting Records

This topic explains deleting a record.

To delete records:

- 1. In the results list, select the record you want to delete.
- 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 email.

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.

Depending on your access rights, you display a record's history in some info areas. The changes in the history include both changes made by users and changes applied by automated processes (e.g. import, triggers or the business logic).

If available, the history is displayed under **Related Data**. The history is not always updated immediately for performance reasons.

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.

Related Data	1			■ ~ Ξ			
< History × Portfolio × > <							
«< < 1 - 15 o	40 > >>	🕑 Most R	lecent Changes 🜘	All Changes 🛛 🚺 🗸			
Date & Time	Field	Changed by	Old Value	New Value			
09.11.2012 13:0	5 Won Opportuniti	Sunny Sales	1	2			
25.01.2010 18:0	9 VAT/Tax ID No.	Simon Seller	а	A			
03.02.2015 15:3	2 Updated (Geo-c	SU	2015020315325.	2015020315325			
09.11.2012 13:0	5 Update Lead St	Sunny Sales	false	true			
19.01.2015 11:1	1 Update Lead St	Sunny Sales	true	false			

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

- Click ⁽¹⁾ (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
- MITML (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 \checkmark and select the desired option, e.g. \blacksquare (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

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:

- Click on the ² (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.

Select Rep	Ξ×
be	Find
List Tree Hierarchy	
Bernd Boss (9200) Bettina Backoffice (9200)	
	-

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.

mir	2
Miranda Meyer	
Wladimir Kral	

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

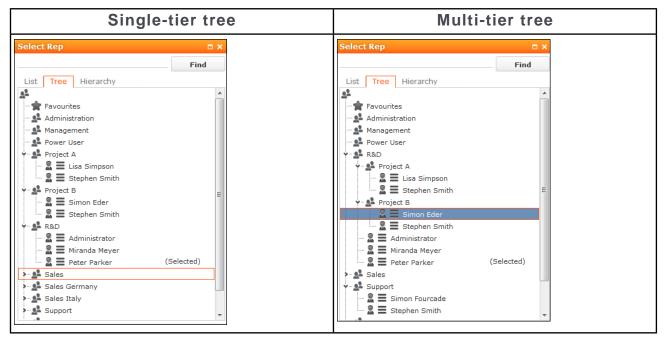
2. Click on a name, if more than one rep meets the search criteria.

The selected name is entered in the rep field.

Selecting Reps from the Tree View

To select a rep from the tree view:

- Click on the a (Select Rep) icon to the right of the field. The Select Reps dialog box is displayed.
- 2. Click on the Tree tab.



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

Rep Favorites

Learn how to set certain Rep as favourite.

If you require a certain rep regularly (e.g. yourself for internal activities, or coworkers 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.

You can add participants to detail plans and assign roles to each participant, e.g. contact person or end customer. You can also enter additional information on participants, such as their attitude or level of influence.

To add a participant to a details plan:

- 1. Switch to the desired details plan.
- 2. Click on \oplus (New) on the Detail Plan Participant tab.
- 3. Choose whether to add a company, person, contact person or one of your favorites as a participant.
- 4. Select the participant's role.
- 5. Click on Save.
- 6. Enter additional data such as the participant's attitude and influence.
- 7. Save the record.

Default Values

Aurea CRM web includes default values for various info areas.

The standard version of Aurea CRM web includes default values for various info areas. You administrator can define further default values for all other 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 $\begin{bmatrix} 101 \end{bmatrix}$ (**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 with 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 longer be displayed correctly.

Applying Default Values

To apply a previously defined set of default values:

- 1. Click on [101] (**Default Values**) in the search mask.
- Click on Q (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.
- 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 $\begin{bmatrix} 101 \end{bmatrix}$ (**Default Values**) in the search mask.
- 2. Click on X (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.

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, see User Configuration on page 58.

Note: For a more detailed description of the calendar and information on adding activities can be found in the Appointment Management chapter of the Business Logic Manual for your vertical.

The calendar in Aurea CRM web contains the following elements:

• • 07.01 - 13.01.2013	New (alendar Entry		Day	y Work	Week	Veek	Month	2
< Jan 2013 >	1	Mon 07.01.20	Tue 08.01.2013	Wed 09.01.20	Thu 10.01.2013	Fri 11.01.2013	Sat 12.01.201	3 Sun 13.01.20	
W Mon Tue Wed Thu Fri Sat Sun 1 31 1 2 3 4 5 6 2 7 8 9 10 11 12 13	0700			^	^				-
2 7 6 9 10 11 12 13 3 14 15 16 17 18 19 20 4 21 22 23 24 25 26 27	0800								
5 28 29 30 31 1 2 3 6 4 5 6 7 8 9 10	0900		(Öst. Biathlon Simon						
Today: Tue 22 Jan, 2013	1000		Simon			📞 (AkiCo			
~ 2	1100	📞 (Gewo		(ÖSV, Simon Eder)	€ Business lunch				
ly Next Activities 💦 🔺	1200			Ederi	(update software AG,				
Weekly project review 28.01.2013 13:00	h				Simon				
ly Next Tasks 🔥	1300		🔝 (Gabrieli,						
Prepare Product Launch Due 08.01.2013 16:00	1400	🐛 (Gewo	Stephen	Estimate					
Estimate time expenditure		Baugen	Product Launch	B	Create				
Due 08.01.2013 17:30 Estimate costs	1500		(Project)	Create docume	marketi brochur (Sub-Pr				
Due 09.01.2013 14:00 Create documents	1600		🛱 Estimate	(Sub-Pr	Create				
Due 09.01.2013 17:00	10		time expendi		sales docume				
Create marketing brochu Due 10.01.2013 16:00	1700	📞 (AkiCo	(Sub-Pr		(Sub-Pr				
	1800								

- 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

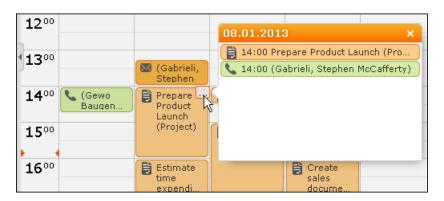
• If appointments have been entered that cannot be displayed in the visible area, the following icon is displayed at the bottom edge of the visible area:



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

	Mon	21.01.20	Tue 22.01.2	
	Project Installation (upd)			
07 00				

• 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.
- You can display or hide the sidebar:



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

• Holidays are color-coded.

Navigating in the Calendar

Learn to navigate in the calender.

You can navigate in the calendar using the following options:

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



- You can use the calendar in the sidebar to:
 - Click on a day to switch the view to just that day.
 - Click on a calendar week to display that work week.
 - Click on the month or year and select an entry from the drop-down list update the calendar accordingly (the view type remains unchanged).



- Use the arrows to move forward or back one month
- When in the day view, hold down Ctrl and click on days in the calendar to display multiple days at once.
- Click on **Today** to display the current date in the day view.
- Click on (Daily & Weekly Planning) to open the daily and weekly planner, >> Daily and Weekly Planning on page 99.

Daily and Weekly Planning

Learn to create plans and appointments on the calender.

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.

Timeline

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

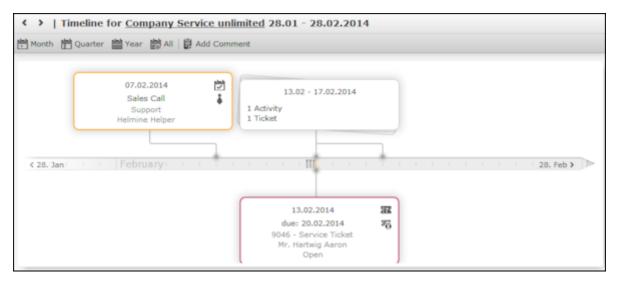
The selected records are displayed along a time axis in so-called "bubbles". You can configure the overview to display different types of records using different colors, icons and text.

By default, the **Timeline** is available for both companies and persons, and the **Marketing Timeline** if available for persons. Your administrator can however configure additional timelines.

To display a timeline:

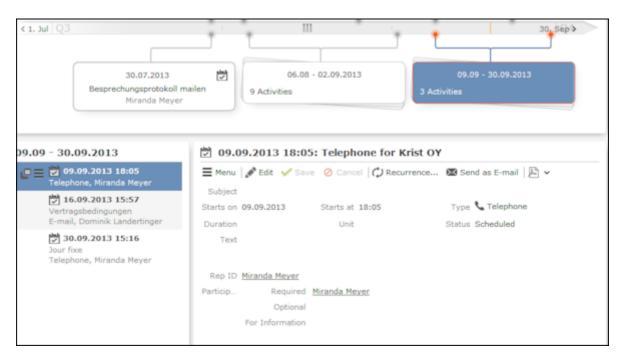
- 1. Switch to the desired company or person, see Searching on page 63.
- 2. Select Timeline or Marketing Timeline from the context menu.

The timeline is displayed.



- 3. Click on select the time period that is displayed in the timeline: Month, Quarter, Year or All.
- 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 (AII) or the yearly view, the display switches to the quarterly view.
 - If you are displaying the quarterly of monthly view, the view switches to the previous quarter or month.
 - Drag the III 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.
 - Use your mouse wheel to zoom in or out.
- 5. Click on a bubble to display the details of the record beneath the timeline.

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



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

6. Click on a bubble containing one or multiple records to display all the records in the bubble on the timeline.

Queries

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

You can define, load and execute complex queries in Aurea CRM web and define queries for other users. Queries can be applied to data across multiple info areas. Your administrator can determine that fields in other info areas are displayed as links. Click on a link to switch to the default view of the associated record.

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 Languge (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, see AQL (Aurea Query Language) in the Aurea CRM web Administrator Guide.

A field with an AQL statement containing multiple conditions and using the same operator AND is interpreted as OR. Similarly, a multiple condition statement using only OR is interpreted as AND. This is the default behaviour of AQL in the context of a single field and applies only for a single field having multiple conditions defined with the same operator. The AND and OR operators behave as expected in all other cases. For example, consider the following multiconditions on a fields and how they are interpreted:

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

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

P Query my visits	^					
✓ Save 🗙 Delete + 🖁 Send to Reps ≫ Run Query in Background ≫ Run Query						
Query name my visits	OPrivate Public query query					
Include Affiliations 🔞						
✓ UQL Syntax						
<pre>select (Contact, Date, EndDate) from (NA) where (Contact='#1' AND Date='20141101' AND EndDate='20141231') orderby (Date)</pre>						
✓ Formatted						
Add Info Area [x] Group AND [x] Group OR						
Activity						
Output Fields: Type, Starts on, Ends on Sort by Starts on						
E Type = "Visk"						
AND Starts on = "01.11.2014"						
Ends on = "31.12.2014"						
Max. 100 Y rows D Run Query	>> Run Query in Background					

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

Defining a New Query

You can define queries in two ways:

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

To define a new query:

1. Click on **(Queries & Analyses**) and select **New Query** from the menu.

The New: Query page is displayed.



 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, see **Sending a Query Definition to another Rep** on page 124.

- 3. Enable the **Include Affiliations** option (if available) 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.
- 4. Click on 📩 (Add Info Area) to open the Select Info Area dialog box.

Note: All info areas that you can access are listed. Your administrator is responsible for determining which info areas you can access.

5. Select an info area. The Select Fields dialog box is opened.

Select Field(s) in Info Area: Activity					
Available Fields	Output Fields	Sort by			
Subject (103,C)	Type (0,X) Starts on (2,D) Ends on (120,D)	Starts on (2,D)	ţ		
By No.		Update Query Cancel			

- 6. 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, 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 I and T 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 \bigcirc to remove all the sort fields from the list. Use the \downarrow and \uparrow buttons, to change the sort order of the fields.

Note: You can select multiple fields by pressing the Ctrl key, see **Selecting** Multiple Records.

- 7. Click the Add to Query button to add your selection to the query.
- 8. Define the conditions in the query, see Conditions on page 110.
- 9. 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 (Reporting) > Queries.

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

Queries Wew X Delete + Send to Reps >> Run Query Settings				^
Query Name my*	Created since			~
User	Changed since			~
Private ?				
Max. 15 Y records per page				Start Search
Queries				
Query Name	New	Update	User	State
my AB customers	27.11.2014 07:49		AKI	Private
my visits	26.11.2014 09:56	26.11.2014 12:17	AKI	Private

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

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

P Query my visits ✓ Save X Delete + [®] ₂ Send to Reps ≫ Run Query in Background ≫ Run Query	^
Query name my visits	Private Public query query
Include Affiliations 🔃	
✓ UQL Syntax	
<pre>select (Contact, Date, EndDate) from (MA) where (Contact='#1' AND Date='20141101' AND EndDate='20141231') orderby (Date)</pre>	
✓ Formatted	
Add Info Area [X] Group AND [X] Group OR	
Activity Output Fields: Type, Starts on, Ends on Sort by Starts on	
Type = "Visit"	
AND ■ Starts on = "01.11.2014"	
Ends on = "31.12.2014"	
Max. 100 V rows	un Query 👀 Run Query in Background

- 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, 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.

- 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.
- Click (Export (MS Excel)) to export your query to an Excel file, see Exporting on page 91.

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), see **Background Queries** on page 125.

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.

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, 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 (**« < 16 - 30 of 45+ > »**) to switch between pages.

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

Deleting Queries

You can delete queries in two ways:

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

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

Adding Info Areas

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.

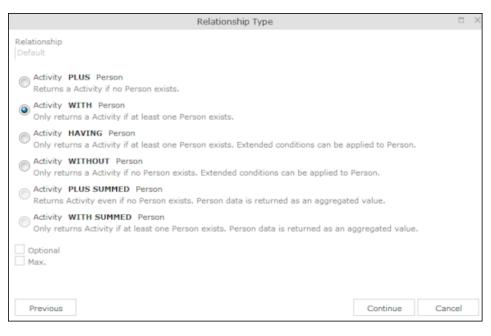
A window is displayed listing all info areas linked to the parent info area.

The **Quick Links** contains a list of the most frequently used info areas. 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.

Select Info Area						
pe		۹	0	Quick Links		
ID	Info Area Label			Activity		
PE	Person					
					Select	Cancel

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



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

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

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

Note: Sort fields are only available for the relation types PLUS and WITH. Sort fields cannot be defined for WITHOUT, PLUS SUMMED or WITH SUMMED. Furthermore, no fields are available for WITHOUT.Only numeric fields can return summed values when using the SUMMED options. Other fields cannot be totaled and therefore cannot be selected from the **Available Fields** list. If you select the relation type WITH but do not select any fields, the child info area is only used to check the criteria. For example, if you select all companies with persons but do not select any fields, a list of all companies to which persons are assigned is shown, but not the information about the persons.

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

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

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

Select Field(s) in Info Area: Person				
Available Fields Search Field Name	q	Output Fields	Sort by	
PE-StaNo (0,S) PE-SerNo (1,L) Form of address (2,X) Country (6,K) Postal Code (7,C) City (8,C) Street (9,C) County (10,C) Country Code (11,Z) Area Code (12,C) Private Tel. (13,C) Private Tel. (13,C) Private Fax (14,C) Date of Birth (15,D) Language (17,K) Acad. Title (18,K) ✓		Last Name (3,C) First Name (4,C) E-mail (5,C) +	Last Name (3,C)	1

- 8. Define the output and sort fields, see Selecting the Fields in the List.
- 9. Click Add to Query. You are returned to the query overview.

10.Define your conditions, see Conditions on page 110.

11.From here, you can execute the query using the **Run** button, see **Executing** Queries.

Activity Output Fields: Type, Starts on, Ends on Sort by Starts on
Type = "Visit"
WITH Person Output Fields: Last Name, First Name, E-mail Sort by Last Name
City = "Vienna"
Max. 100 Y rows

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.

Relationship Type		×
Relationship		
Default (
_		
1. PE-StaNo, PE-SerNo -> PE_1_StaNo, PE_1_SerNo		
2. PE-StaNo,PE-SerNo -> PE_2_StaNo,PE_2_SerNo		
3. PE-StaNo,PE-SerNo -> PE_3_StaNo,PE_3_SerNo		
126. 'KM', PE-StaNo, PE-SerNo -> Link to Info Area, Link_StaNo, Link_SerNo		
Ticket HAVING Person Only returns a Ticket if at least one Person exists. Extended conditions can be applied to Person.		
© Ticket WITHOUT Person Only returns a Ticket if no Person exists. Extended conditions can be applied to Person.		
Ticket PLUS SUMMED Person Returns Ticket even if no Person exists. Person data is returned as an aggregated value.		
Ticket WITH SUMMED Person Only returns Ticket if at least one Person exists. Person data is returned as an aggregated value.		
Optional Max.		
Previous Continue Can	cel	

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.

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 123.

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 \equiv to the left of **Conditions** and select **Add Condition** from the menu.

The following window opens:

	Select Field(s) in Info	Area: Activity	×
Select	the field in the Activity info ar	ea to add to your condition:	
Searc	n Field Name Q		φ.
No.	Field Name	Field Type	_
0	Туре	Catalog	
1	Status	Catalog	Ξ
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	-
		Next Cancel	

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.
- 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.

Value(s) of Type in the	Activity Info A	rea	×
Enter a condition for the Type field in the Activ Field Type = (equal) <> (not equal) Value: Fixed Field	vity info area.		
Available Fields	Selected Fields		
Use as parameter (requires user input) Telephone Visit Letter Event E-mail Fax Info			
Internet			
	Previous	ОК	Cancel

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, see Parameters and Predefined Queries on page 123.

- 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.
- 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 substrings. To do so:

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

Value(s) of Country in the Per	son Info /	Area	×
Enter a condition for the Country field in the Person Field Country = (equal) <> (not equal)	info area.		
Value: Fixed Field Text			
*land Use as parameter (requires user input)			
Pre	vious	ОК	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 **Characteristic** field in the **Characteristic** info area), you need to specify the parent catalog value (e.g. **Characteristic group**) before you can define the condition for the child catalog.

The following example uses the Characteristic field in the Characteristic info area:

Value(s) of Characteristic in th	e Characteristic Info Area 🛛 👋
Enter a condition for the Characteristic field in a Please select the parent catalog value: Hobbies Field Characteristic = (equal) <> (not equal) Value: Fixed Field	the Characteristic info area. رآس
Available Fields Use as parameter (requires user input) no value Cooking Culture Golf Kanzashi Soccer Tennis Travelling	Selected Fields Baseball
	Previous OK Cancel

Conditions applied to child conditions are otherwise defined the same as for all other catalogs, 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, see **Comparing Field Contents**.
- 4. Select either Yes, (true) No (false) or Use as parameter as the comparison value, see Parameters and Predefined Queries on page 123.
- 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.

Value(s)	of E	Ends	on	in th	e Ac	tivity	y Inf	o Are	ea ×
Enter a condition for the Ends on Field Ends on = (equal) <> (not equal)									< (less) <= (less or equal)
Value: Fixed Variable Field 27.11.2014									ر آس
	< W 1	Mon	Tue	Nov Wed	2014 Thu		Sat	>	\cup
	44	27	28	29	30	31	1	2	
	45	3	4	5	6	7	8	9	
	46	10	11	12	13	14	15	16	
	47	17	18	19	20	21	22	23	
	48	24	25	26	27	28	29	30	
	49	1	2	3	4	5	6	7	
		Тос	day:	Thu	27 N	lov, 2	2014		

- 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, see Variable Conditions, Comparing Field Contents and Parameters and Predefined Queries on page 123.
- 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.

Value(s) of Ends at in the	Activity Info Ar	ea	×
Enter a condition for the Ends at field in the Activit Field Ends at	ity info area.		
= (equal) <> (not equal) > (greater) >= (g	reater or equal)	< (less) <:	= (less or equal)
Value: Fixed Variable Field			
13:00			
Use as parameter (requires user input)			
	Previous	ОК	Cancel

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), 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, see Parameters and Predefined Queries on page 123.
- 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, see Parameters and Predefined Queries on page 123.

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, 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, see Parameters and Predefined Queries on page 123.

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), seeSelecting Reps on page 92.

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

<u>Elke Führer; Gudrun Peischer; Miranda Meyer</u>

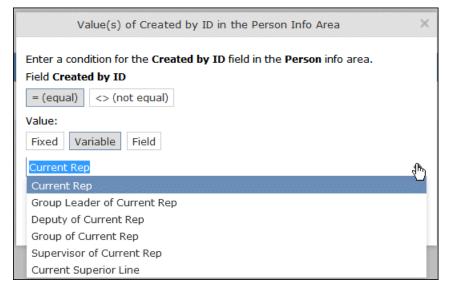
Variable Conditions

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.

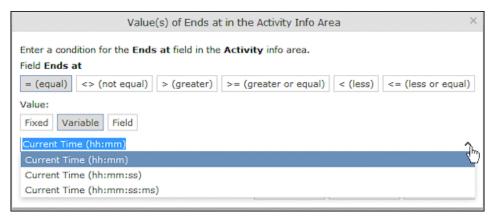
		ted on field in	the Activity info area.		
Field Created		> (greater)	>= (greater or equal)	< (less)	<= (less or equal
Value: Fixed Varia					
+ - 7 + -	Days Weeks Months				
+ -	Quarters Years		Previous	OK	Cancel

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.

Value(s) of Cre	ated by ID in t	he Activity Info	Area >
Enter a condition for area.	the Created by	ID field in the A	ctivity info
Field Created by ID			
= (equal) <> (not	equal)		
Value:			
Fixed Variable F	field		
Rep ID			Q
	Previous	ОК	Cancel

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

Conditions in the Overview

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

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

		nd e-mails* +& Send to Reps >> Run Query in Background >> Run Query		^
Query name	Visits and	e-mails	Private query	Public query
✓ UQL S	yntax			
		Date, Rep) from (NA) #1' OR Contact='#5') AND (Date='20150112' OR Date='20150119' OR Dat	te='20150126	•))
✓ Forma	tted			
H Add Info	o Area [×]	Group AND K Group OR		
E Activit	t y			
Output	Fields: Typ	e, Starts on, Rep		
	∎ ⊤уре -	("Visit" OR "E-mail")		
■ AND		■ Starts on = "12.01.2015"		
		Starts on = "19.01.2015"		
		Starts on = "26.01.2015"		
Max. 100	✓ rows	🔊 Run Query 🔊	Run Query in B	Background

Linking Conditions

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

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

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

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

	× Delete	Ind e-mails* → Send to Reps ≫ Run Query in Background ≫ Run Query d e-mails	Private	Public query
✓ UQL S	yntax		quary	quary
		Date, Rep) from (MA) '#1' OR Contact='#5') AND (Date='20150112' OR Date='20150119' OR Dat	te='20150126	'))
✓ Forma	atted			
∟th Add Inf	o Area [X]	Group AND]x[Group OR		
E Activi	ty			
Output	Fields: Typ	be, Starts on, Rep		
	≣ ⊤уре	= ("Visit" OR "E-mail")		
■ AND		Starts on = "12.01.2015"		
	∎ OR	Starts on = "19.01.2015"		
		■ Starts on = "26.01.2015"		
Max. 100	✓ rows	≫ Run Query →	Run Query in I	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.

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

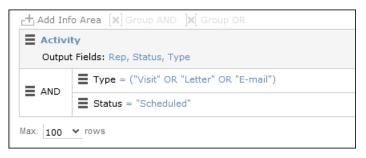
Comparing the value in a catalog field to one or more values

CatField1 = Value1a OR Value1b OR Value1c

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

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

AND Status = 'Scheduled'



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.

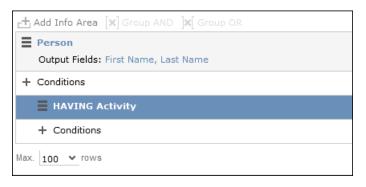
You can use advanced conditions to use sum totals to restrict your query results. For example, you can list all companies with more than 10 employees exist using advanced conditions.

Defining Advanced Conditions

To define an advanced condition:

1. Link two info areas in a query using either HAVING or WITHOUT, see Adding Info Areas.

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.

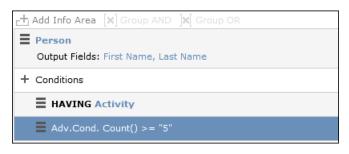
3. Select a field and click on Next.

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 A Field Count	Activity info area.			
= (equal) <> (not equal) > (greater)	>= (greater or equal)	< (less) <=	(less or equal)	
Value: Fixed 5				
Use as parameter (requires user input)				
	Previous	ОК	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.



Parameters and Predefined Queries

Learn about the use of parameters and predefined queries.

Most users do 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, see Defining Conditions on page 110.

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

1. Open a query, see Loading Queries.

H Add Info Area [X] Group AND X Group OR				
Activity				
Output Fields: Typ	e, Starts on, Ends on			
AND Starts	on >= <u>Parameters</u>			
	on <= <u>Parameters</u>			
✓ Parameters				
Starts on >=	19.01.2015 ~			
Starts on <=	23.01.2015 🗸			
Max. 100 V rows		እ Run Query		

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

Tip:

- 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:

- 1. Load a query (see Loading Queries) or select a query in the list of queries.
- 2. Click 📲 (Send to Reps).

A dialog box is displayed.

Click on a (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.
- 5. Enable **Notify Rep(s)** to determine that the recipients should receive a message informing that they have received the query.
- 6. Enable the **Overwrite existing query definition** option to overwrite any queries with the same name owned by the recipients.
- 7. Click Send Query.

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

Saving, Loading and Exporting Query Results

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 \checkmark (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 (\checkmark) 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.

Au	New Quick Query			Q• Search
•		Compose Run Query	Finalize	^
) II 4	Root Info Area Relationship Type L Please select des ¥ Add another condition	nked Info Area Where Field Logic where	al Operator Condition Fields	
<u> </u>	33 Run Query			

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

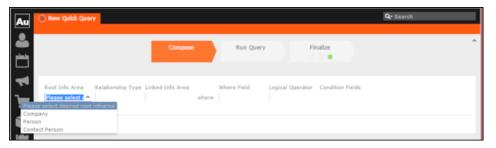
To create a quick query, perform the following steps:

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

Queries			Q• Sea	nch
/ Queries				
🛞 New Query 🛞 New Quick Query 🗙 Delete +🚊 Send to Reps.				
Query Name	Created since DD.HM.YYYY		~	
User	Changed since DOLMORYYYY		~	
Private [7]				
Max. 15 👻 records per page		5	tart Search	
Queries				
Query Name	New	Update	User	State
>> A new test query	15.01.2016 13:04	15.01.2016 13:04	SU	Public
A public query for me	15.01.2016 13:06		SU	Public
>> Another test query	15.01.2016 22:40		SU	Public
>> company_with_rep	20.01.2016 16:49		SUSI	Public
E P CompanyTest	03.02.2016 00:47		SU	Public
S CRM-3339-Query	19.01.2016 10:12		SU	Public
35 k123	19.01.2016 13:31		SU	Public
KiranPublicQuery	19.01.2016 05:46		SU	Public
55 KiranPublicQuickQuery	19.01.2016 06:51		su	Public
>> Manuels QuickQuery	19.01.2016 08:30	19.01.2016 08:30	SU	Public
>> Manuels working QuickQuery	19.01.2016 13:43		su	Public
MyFI	06.11.2015 14:17		HEMANT	Public

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

- 2. Click New Quick Query to open the window at the Compose tab.
- 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.

Au New Quick Query Sea	rch Contact Time linked to 24.11.2015 0	41 ×	Q. Search
Root Info Area Relationship	Compose	tun Query Fin	halize
Company with Add another condition Run Query	a Type Linked Info Area Where w <u>Copositionis</u> where Select Mailing Message Message to interests Note Offer Item Offer Item Partial Delivery Opportunity Competitor Opportunity Participant Opportunity Product Order Item Partial Delivery Opportunity Participant Opportant Product Order Item Partial Delivery Opportant Product Order Item Participant		Condition Fields

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.

New Quick Query Search Contact Time linked	d to 24.11.2015 04: ×	Q• Search
	se Run Query Finalize	^
Root Info Area Relationship Type Linked Info Area Company v with v Opportunity v Add another condition v >> Run Query		

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.

Au	New Quick Query Search	Contact Time linked to 24.11.2015 04: ×	Q• Search
≗ ≅		Compose Run Query	Finalize
i 🔹 🗹 🛓	Root Info Area Relationship Type Company V with Add another condition X Run Query	Linked Info Area Where Field Logical Ope Opportunity where Completion Is between	
₽ 3 ° 9 4			

- 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

Au	New Quick Query Search Contact Time linked to 24.11.2015 04: × Qr Search	
2	Compose Run Query Finalize	^
Ë		
4	Root Info Area Relationship Linked Info Area Where Field Logical Operator Condition Fields	П
	Company v with v Opportunity v where Completion v Is between v 08.02.2. v and 12.02.2. v	- 1
Add	Add another condition	- 1
	Add records that meet the following conditions Add records from the following query	- 1
Θs	Subtract records that meet the following conditions Subtract records from the following query	
3		

9. Click Run Query to test the results.

Au	< 🕐 New Quick Query	Search Contact Time lin	iked to 24 🕨 🗸	Q• Search
•	Con	ipose Run Q	Juery Fin	alize
	Query Result			🔛 Export All (MS Excel)
<u>,</u>	Company		City	Country
	Apple		Geneva	Switzerland
	Henschel Gm	ЬН	Kassel	Germany
	Dell		Budapest	Hungary

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.

۱u	New Quick Qu	ery Sea	rch Contact Time linked	:o 24.11.2015 04: ×	Q- Search	
			Compose	Run Query	Finalize	
	Root Info Area	Relationship Type with	Linked Info Area Opportunity ~ where	Where Field Logical Operator Completio V Is between	Condition Fields	,
	Add records					
1	Root Info Area	Relationship Type	Linked Info Area	Where Field Logical Operator	Condition Fields	× Delete
	Company	with 🗸	Opportunity ¥ where	Project M Y Equals (=)	👻 Susi 🙎	
	Add another co	ndition 🗸	,			
Š	>> Run Quer	V				

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.

Au	New Quick Query Search	Contact Time linked	to 24.11.2015 04: ×		Q• Search
•		Compose	Run Query	Finalize	^
-	Query Result				Export All (MS Excel)
_	Company			City	Country
	AMBEG Dr. J. Dichte	r GmbH		Berlin	Germany
	Apple			Geneva	Switzerland
	Henschel GmbH			Kassel	Germany
	Datsun			ROMA	Italy
r -	Dell			Budapest	Hungary
3 G					

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.

) New Quick Qu	ery Sea	rch Contact Time linked	to 24.11.2015 04: ×	Q+ Search
		Compose	Run Query	Finalize
Root Info Area	Relationship Type	Linked Info Area	Where Field Logical Operator	Condition Fields
Company 👻	with	• Opportunity • when	e Completio 🖌 Is between	✓ 08.02 ✓ and 12.02 ✓
Add records	that meet t	~		
Root Info Area	Relationship Type	Linked Info Area	Where Field Logical Operator	Condition Fields X De
Company	with	• Opportunity • when	e Project M Y Equals (=)	👻 Susi U 🙎
⊙ Subtract rec	ords from t	~		
com				× De
comp-ita_hung				
Comp-query-ge				
company_basic				
company_with CompanyTest	rep			
Comp-query-ge	er.			
	nn hasir rev			

b. Click Run Query to view the results of the new enhancement.

Au Sew Quid	k Query Search Contac	t Time linked to 24.11.2	>	earch
	Compose	Run Query	Finalize •	Ŷ
Query Resu	ilt Company		City	Export All (MS Excel)
	AMBEG Dr. J. Dichter GmbH		Berlin	Germany
· ·	Apple		Geneva	Switzerland
۰ ۱۳	Dell		Budapest	Hungary

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.

Au	P New Quick Query			Q• Search	
≗ ≌	Cor	npose	Run Query	Finalize	^
\$ ↓	Define visibility Save as Go back to query list		uery Public Query List	Save	
► ~					
3					

- 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:

Watchille									Q :	Search
9. Wa	tchlist									
	Creat	tor .	1	Watched	Walda Search Held Name	Q,	0			
		Created by me	-							
	latched Irifa Ar	sa Select infoarea	~							
	reation Date fro	an Period WYY	÷							
	Creation Date	the AMAZONYYYYY	~							
		Dashboard Notification Popup Notification Email Notification Record Only Is Active								
						Clear Search				
atchli	st Subscrip									
	4	Creation Data 06/06/3016 13:23 am	Creator Supi Uper(SUSI)	In Active	Dashboard Netification	Popup Notification	Email Notification	Record Only	Watched Item Lamplanet	Watched Fields AddiveSince.CostsRef
	3	06/06/2016 11:21 am	Super User(SU)	~	2	~	2	2	Zummatechi	
	2	06/06/20 011/21 am	Super User(SU)	2	2	2	2	2	Lamplanet	

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.

I Zumr	≣ Henu	×								
E Mary	to the Ver	· By Select Affiliates								
Addres	Analysis: Buying Prequency Analysis: Contact Prequency Q, Timeline I Visit Planning Relationship Hierarchy Relationship Natuork	, Baiy					Logo			0
			Are	a Code		1	elephone (25255)	555		
	X Delete			t-mail dnits.kharmardiaara	8.0070			theymoul@euree.co	10	
	# Add to Reverites Copy Link to Clipboard Herge with			+p 1 1D			Website grammati	healam		
Relate	Nalus Call									$\mathbb{H}\times\mathbb{H}$
Person		> portunities = Offers = Orders	Installed Bases	 Service Contracts × 	Tickets - Sales Group -	Document Links	Map × C	ontact Times 😒		
	Go to All Related								Hiter in Diple	y All Records
1	Q Rothing	Add Item To Wetchist	Function	Department	Area Code	Tel 1	Company	E-mail	Date	of Birth
	Monary 10	View All Watchers					Zummatechi	dmitrukhaum	CORRECTA COM	
	Resi	Orlando					Zummatechi			
	Smith	2phn					Zummatechi			

After adding an item to the Watchlist the Watchlist context menu allows you to perform the following tasks:

- Delete items from the watchlist.
- View all watchers.
- Deactivate watchlist items.
- View change notifications.
- Edit watchlist item.
- See the screenshot below:

E Lample	anet				
🛛 Lam	E Menu	×			
E Menu	E: Tree View Analysis: Buying Frequency Analysis: Contact Frequency Q. Timeline		v ⁸ ⊚ Select Affiliates		
Addres	Visit Planning		агу		
	Relationship Network				Area Code
	➤ Delete ★ Add to Favorites Copy Link to Clipboard				E-mail <u>dmitry.khaymov2@aurea.com</u> Rep 2 ID
Relate	Merge with Subscriptson Make Call				
Person		>	portunities × Offers × Orders	X Installed Ba	ases 🛛 Service Contracts 🖄 Tickets
1	Go to All Related	>	First Name	Function	Department
	Q Watchlist	>	Delete Item From Watchlist		
	Mertens		View All Watchers Deactivate Watchlist Item View Change Notifications Edit Watchlist Item		

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

- A notification request is set for any change to the record of interest and a change is made to the record.
- A notification request is set for changes made to specific fields of a record and one or more of the specified fields are changed.
- The following screenshot shows the change notifications visible on the Dashboard:

Start Page	Se Smith
Aurea Welcome to Aurea CRM, Super User	
Recent notifications A X	Today's notifications
2 Recent notifications	2 Today's notifications
Zummatechi changed by Super User at 06/05/2016 15	Lamplanet changed by Super User at 06/05/2016 15:58
Quick Start A X	Sales Radar
🛱 Companies 🚊 Persons in Company 🛗 Calendar 🏴 Queries	
My Week A X	
Hon 05/30/2016 Tue 05/31/2016 Wed 06/01/2016 Thu 06/02/2016 Pri 06/03/2016	Category 'Level' 0.1
8 20 AM	
910	6.1

• The following screenshot shows a popup change notification:

	Change Notification	Details		
Change Notification D				
Changed Item Person in Com Author Super User - S		Date of Change Is Read	2016/06/2005 12:00	am
Changed Fiel((s				
Field Id	Field Name	Field Type	Updated Value	
	Street	Character	wrwrerw	
20	ZipCode	Character		
19	Country	Catalog	4	
6	Tel1	Character	7474747474	
		м	ark As Read	Close

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

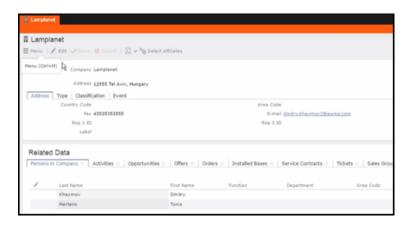
Adding items to the Watchlist

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.

📱 Lampla	net		
🛱 Lamp	E Menu	×	
■ Menu	Tree View Analysis: Buying Frequency		∽ [©] ® Select Affiliates
Addres	Analysis: Contact Frequency Q. Timeline Visit Planning Relationship Hierarchy		angary
	Relationship Network Celete		
	Add to Favorites Copy Link to Clipboard		
Relate	Merge with So Make Call		
Person	• New	>	portunities × Offers × Orders ×
1	Go to All Related	>	First Name
	Q Watchlist	>	Add Item To Watchlist
	Mertens		View All Watchers

The Add Item to Watchlist window displays.

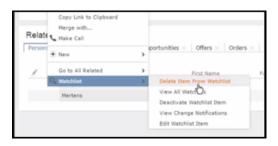
Add Item To Watchlist	\times
Please select notification option and add item to personal watch list to get notified if something changes with the record.	
Notification Types Dashboard Notification	
Popup Notification Email Notification	
Record Only	
Notify On	~
Save	

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

- 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:

- Select Change on Specific Fields from the Notify On dropdown list.
- 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.

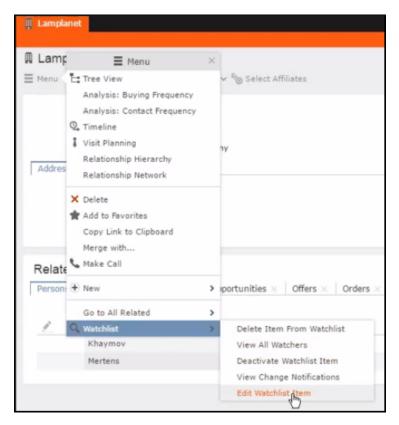


Editing Watchlist Item

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.

	Edit Watchlist Item	×
₫,	Please select notification option and update watch list item to get notified i something changes with the record.	f
✓ Das ✓ Pop ✓ Ema	tion Types Suboard Notification aup Notification ail Notification Sord Only	
Notify O Every C		~
	Save	_

3. Select or Deselect 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:
 - Select Change on Specific Fields from the Notify On dropdown list.
 - 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 record is successfully added to the watchlist.

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.
- 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.

		Watchers of - Company-Lamplanet(x0000006400000001)								
Watc	hers									
	#	Creator	Create Date	Is Active	Notify On	Dashboard	Popup Noti	Email Notif	Record Only	Specific Fie
		Super User	06/16/201	Z	Every Cha		~	Z	~	
	21	Susi User	06/18/201	~	Every Cha	\checkmark	×	×	v	

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:

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

Q Watchlist	Created by me	2	Watched Fields Search Field Name	٩	0
Watched Info Area Creation Date from	Select infoarea	*			
Creation Date to	Dashboard Notification Popup Notification Popup Notification Preced Only Record Only Is Active	*		Clear	Search
			There is no found w	atchlist subscript	ions.

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

Watchlist Subscript	tions								
	Creation Date	Creator	Is Active	Dashboard Notification	Popup Notification	Email Notification	Record Celly	Watched Darn	Watched Fields
13	06/36/2036 02:35 pm	Super User(SU)	12	2	R.	2	2	Zummatechi	
1	06/34/2036 62:17 pm	Super Uner(SU)	2	2	2	2	2	Lamplanet	

Note: The **Is Active** column shows if a watchlist item is active or not. A check mark indicates that the watchlist item is active. A blank check box shows that the watchlist item is deactivated.

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

Watchlist Subscriptions E Actions	×	n Date	Creator	Is Active	Dashboard Notification	Popup Notification
Deactivate Watchlist Item		02:35 pm	Super User(SU)	2	×	×
Delete Watchlist Item		02:17 pm	Super User(SU)	~	1	
Edit Watchlist Item						

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

Watchlist Subscrip	tions			
1	Creation Date	Creator	Is Active	Dashboard Notification
11	06/16/2016 02:35 pm	Super User(SU)		V
1	06/16/2016 02:17 pm	Super User(SU)	×	×

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

Watch	hlist Subscriptions					
	Actions	×	n Date	Creator	Is Active	Dashboard Notification
\equiv	Activate Watchlist Item		02:35 pm	Super User(SU)		×
Actions	Delete Witchlist Item Edit Watchlist Item		02:17 pm	Super User(SU)	V	8

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

Watchlist Subscrip	tions			
1	Creation Date	Creator	Is Active	Dashboard Notification
11	06/16/2016 02:35 pm	Super User(SU)	v	¥
1	06/16/2016 02:17 pm	Super User(SU)	1	v

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.

Watchlist							
Creator		91	Watched Fields	city		Q	0
	Created by me			No.	Field Name	Field Type	
Watched Info Area	Person in Company	~		21 99	City Home Office City	Text	
Creation Date from	MM/DD/YYYY	~		33	nome once city	TEXL	
Creation Date to	MM/DD/YYYY	~					
	Dashboard Notification Popup Notification Email Notification Record Only Is Active						

- 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:

- 12-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.
- Image: Content of the state of

To select an item perform the following:

a. To activate a filter item, click 2.

The icon changes to a checkbox(\Box).

- b. To set the value of the filter as true, click the checkbox (☑). Leave the checkbox empty (□) to set the filter as false. For example, for the Dashboard Notification filter, setting it to true (☑) would mean a notification is included in the watchlist item, if the dashboard notification type was configured in the watchlist item generating the notification.
- 4. Click Search.

The search result is displayed in the bottom pane.

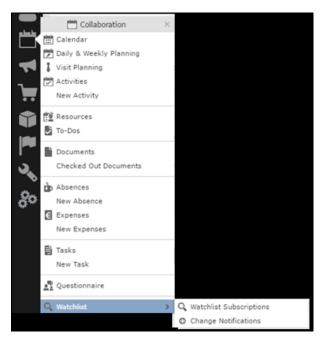
Watc?	hlist Subscripti	ons								
		Creation Date	Creator	Is Active	Dashboard Notification	Popup Notification	Email Notification	Record Celly	Watched Item	Watched Fields
	3.5	06/36/2036 02:35 pm	Super User(SU)	100	2	2	2	2	Zummatechi	
	1	06/36/2016 02:17 pm	Super Uner(SU)	2	2	2	2	2	Lamplanet	

Searching Notifications

You can search the set of all notifications issued on all the subscribed records in the CRM database.

To search the history of all change notifications, perform the following steps:

- 1. Select the Collaboration > Watchlist > Change Notifications. Open the record to which you have added the watchlist item.
- 2. Select Menu > Watchlist > Change Notifications.



The Change Notification page displays.

thang	e Notificat	lons								Q. Search	
0 Ch	nange N	otificati	ions								
		Author				91	Changed Fields	Search Field Name	. q	<u>2</u>	
	Changed	Infoarea	Select info	area		~					
Dr	ate of Char	nge from	MM/DD/111	rr.		~					
	Date of C	hange to	мм/ро/пп	rr.		~					
			7 Popup N						Clear	Search	
ang	je Notifi	cations									
	#		of Change	Author	Is Read	Dashboard No	Popup Notifica	Email Notificat	Record Only	Changed Item	Changed Field
	6	06/16	2016 03	Super User(SU)		~	~		2	Hr. Carlene Hc	ZipCode
	5	06/16/	2016 03	Super User(SU)	×	V	2	2	V	Lamplanet	ZipCode
	4	06/16/	2016 02	Super User(SU)	~	1	1	×	1	Zummatechi	ZipCode
	3	06/16/	2016 02	Super User(SU)	~	¥	×	~	~	Zummatechi	ZipCode
	2	06/16/	2016 02	Super User(SU)	~	×	×	~	1	Lamplanet	ZipCode
		06/16/				~	1				

- 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:

- 12-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.
- Image: Ima

To select an item perform the following:

a. To activate a filter item, click 2.

The icon changes to a checkbox(\Box).

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	1s Read	Dashboard Notification	Popup Notification	Email Notification	Record Only	Changed Item	Changed Fields
View Change Notification Details	12:06 pm	Super User(SU)		2	2	2	R.	Lamplanet	RepID
Mark As Read	12:06 pm	Super User(SU)		2	2	2	2	Lamplanet	Country
0									

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

Chang	e Notification	15						
		Date of Change	Author	Is Read	Dashboard Notification	Popup Notification	Email Notification	Record Only
	2	06/06/2016 12:06 pm	Super User(SU)	2	2	2	2	2
≡	1	06/06/2016 12:06 pm	Super User())		~	2	2	2

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.

Chang	e Notifications									
	Actions ×	Change	Author	1s Read	Dashboard Notification	Popup Notification	Email Notification	Record Only	Changed Item	Changed Fields
- C	View Change Notification Details	12:06 pm	Super User(SU)		2	2	2	2	Lamplanet	RepID
	Hark As Read	12:06 pm	Super User(SU)		2	2	2	2	Lamplanet	Country
	0									

• The Change Notifications Details window displays.

	Change Notification	Details	×
Change Notification Det Changed Item Person in Comp Author Super User - SU	any-Mr. Carlene Mcnary	Date of Chang Is Rea	e 06/16/2016 03:29 pm d
Changed Fields			
Field Id	Field Name	Field Type	Updated Value
20	ZipCode	Character	34343
		Ma	ark As Read Close

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

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.

Change Notific	ations								
Auth	и	2	Changed Field	Barren Field Name	Q	0			
Character & Indonesia				No. Field Name	Field Type				
Changes presare	 Company Lamplacet 			4212 (Created on)int	ernal. Numeric				
Date of Change fro	- PERSONAL	v		4206 (Updated on)int	ierna Numeric				
				25 ABC	Text				
Date of Change	MPEDERTTY	v		165 Accommodation	Cos. Numeric				
	T Deshboard Notification			176 Accommodation	Cas. Decoded				
	7 Popup Notification 7 Email Notification			191 Active since	Date				
	7 Record Only 7 Is Read								
					Cear Seard	h			
hange Notificatio	ns								
	Date of Change	Author		Dashboard Notification	Popup Notification	Email Notification	Record Only	Changed Item	Changed Fields
2	06/06/2016 12:06 pm	Super User(SU)		2	2	2	2	Lampianet	RepID
1	06/06/2016 12:06 pm	Super User(SU)		2	2	2	2	Lamplanet	Country
	-								

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

- **3.** To search for specific notifications you can select the filters from the following list:
 - Author—Filter the notifications issued to the specified subscriber. Only one person can be selected.
 - Changed Infoarea—Not editable. This is restricted to the record you selected.
 - **Date of Change from**—Select the start date from which you want to view notifications issued.
 - **Date of Change to**—Select the end date before which you want to view notifications issued.
 - **Changed Fields**—Filter the notifications issued for changed to specific fields. You can select multiple fields from the listed fields

Note: When you select multiple filters from the above list, the search would select notifications that satisfy all the selected criteria.

4. Select the notification type and read status filters from the list of items.



Note: If multiple filters are selected, then search would select a notification if it satisfies any one of the criteria.

These filters can toggle between the following three states, indicated by the changing icon. You can click on a filter to toggle between the states. The states and their effect on the filter is described below:

- 12-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.
- 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 2.

The icon changes to a checkbox(\Box).

- 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	K Change	Author	1s Read	Dashboard Notification	Popup Notification	Email Notification	Record Only	Changed Item	Changed Fields
View Change Notification Details	12:06 pm	Super User(SU)		2	2	2	2	Lamplanet	RepID
Hark Ag Rend	12:06 pm	Super User(SU)		2	2	2	2	Lamplanet	Country
0									

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

Chang	ge Notification	15						
		Date of Change	Author	Is Read	Dashboard Notification	Popup Notification	Email Notification	Record Only
	2	06/06/2016 12:06 pm	Super User(SU)	2	×	¥.	× .	8
≡	1	06/06/2016 12:06 pm	Super User())		2	2	2	2

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	X Change	Author	Is Read	Dashboard Notification	Popup Notification	Email Notification	Record Only	Changed Item	Changed Fields
View Change Notification Detail	la 12:06 pm	Super User(SU)		2	8	2	8	Lamplanet	RepID
Hark As Read	12:06 pm	Super User(SU)		2	20	2	2	Lamplanet	Country
0									

• The Change Notifications Details window displays.

	Change Notification	Details		×
Change Notification Det Changed Item Person in Comp Author Super User - SU	any-Mr. Carlene Mcnary	Date of Chang Is Rea	e 06/16/2016 03:29 pm d 🗌	
Changed Fields				
Field Id	Field Name	Field Type	Updated Value	
20	ZipCode	Character	34343	
		Ma	ark As Read Close	

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

Marking Change Notification as Read

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

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

To mark a change notification from the dashboard, double the notification and the **Change Notification Details window** displays. In this window click **Mark as Read** to mark the notification.

luirea /elcome to Aurea CRM, Super User						
Recent notifications			* X	Today's notificati	ons	
2 Recent notifications				2 Today's	notifications	
Zummatechi changed by Super User at 06/36/2056 14	atachi changed by Super User at 66/36/2016 14:48					
Quick Start			~ ×	Sales Radar		
🛱 Companies 📃 Persons in Company	Calen	c	hange Notification	Details		
My Week Men 06/13/2016 Tue 06/14/2016 Y	Changed Dr. Auto	ification Details m Company-Zummated or Super User - SU (100		Date of Change Of	/16/2016 02:48 pm	
800	Changed Fi		ield Name	Field Type	Updated Value	
900		7	ZpCode	Character	4556	
AH 10 ⁰⁰						
AR						
11 ⁰⁰						
12 ⁰⁰				Ha	rk As Read Close	
100	_					

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.

Change No	tification	•							Q. Search	
© Chan	ge Not	ifications								
	А	uthor			2	Changed Fields	Search Field Name	, q	0	
Chi	inged Inf	oarea Select info	parea		¥					
Date o	f Change	from MM/DD/11	nnr		~					
Dat	e of Char	ge to MM/DD/m	m		~					
hange N	latifica	 Popup Email 1 Record Is Read 						Clear	Search	
-	:	Date of Change	Author	Is Read	Dashboard No.	Popup Notifica	Email Notificat	Record Only	Changed Item	Changed Field
	5		Super User(SU)		Z	2		~	Mr. Carlene Mc	ZipCode
	5		Super User(SU)	2	2	- 	2	2	Lamplanet	ZipCode
	1	06/16/2016 02	Super User(SU)	~	2	2	2	2	Zummatechi	ZipCode
			Property in sectors in	2	2	1	~	~	Zummatechi	ZipCode
= :	3	06/16/2016 02	super user(su)							
			Super User(SU)	~	×	~	2	~	Lamplanet	ZipCode

- 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.

Chang	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)	2	2	2	2	2	
≡	1	06/06/2016 12:06 pm	Super User())		2	2	2	2	

- b. Marking the item as read from the change notification details window.
 - Click the Action context menu, and select View Change Notification Details.

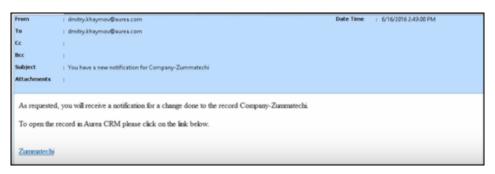
Change Notifications									
Actions ×	Change	Author	1s Read	Dashboard Notification	Popup Notification	Email Notification	Record Only	Changed Item	Changed Fields
View Change Notification Details	12:06 pm	Super User(SU)		2	2	2	8	Lamplanet	RepID
Mark As Read	12:06 pm	Super User(SU)		2	2	2	2	Lamplanet	Country
0									

• The Change Notifications Details window displays.

	Change Notification	Details	
Change Notification De Changed Item Person in Com Author Super User - S	pany-Mr. Carlene Mcnary	Date of Chang Is Rea	ge 06/16/2016 03:29 pm
Changed Fields			
Field Id	Field Name	Field Type	Updated Value
20	ZipCode	Character	34343
20	ZipCode	Character	34343
		м	ark As Read Close

• 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.

The dashboard can display two types of change notifications, recent change notifications and today's change notifications. See the screenshot below.

Stat Page							Qr Search
lurea							
/elcome to Aurea CRM	I, Super User						00 ~
Recent notifications					А Ж	Today's notifications	A 1
S Recent notific	ations					S Today's notifications	
Ht. Dmitry Khaymov char	ged by Super User at 0	6/05/2016 16:03				χ Lamplenet changed by Super User at 06/05/2016 17:01 $${\rm k}_{\rm c}$$,
Quick Start					• ×	Sales Radar	A 1
🖺 Companies 📃 🏦 Pe	rsons in Company	🖽 Calendar 🛛 🖡	Queries				
Hy Wask					e x		- ab - 10
Her 05/30/2016	Tue 05/31/2006	Wed 06/01/2016	Thu 06/02/2016	Pri 06/03/2016		Category "Level"	
8.00						6.1	0.1
ADI						0.1	0.1
9.00						-1	1.1
1000						6.1	0.1
AN							
11 ⁰⁰						8.1	0.1
12 ⁰⁰					- 11		

Note: What you see on the dashboard is mostly configured by your CRM administrator. If you do not see the above, please contact your CRM administrator to enable the notifications.

The **Today's Notification** widget shows you all the change notifications generated today till the current time. This widget is live and gets updated as soon as subscribed watchlist item is changed. The **Recent Notification** widget shows you all the notifications in the previous 30 days, including today. The number of days is configured by the CRM administrator.

When you hover the mouse over either of the widgets, the scroll buttons are activated. Click the scroll buttons to move forward (>) or backward (<) through the list of change notifications.

Double a change notification to open the **Change Notification Details** window. You can mark a change notification as read, by clicking the **Mark as Read** button in this window.

Analyses

Analyses are based upon queries and display the resulting records in an aggregated form including a graphical representation of relationships.

For further details, see Queries on page 101.

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 (**Reporting**) > **Analyses** from the menu.

All available analyses are listed. You can use search criteria to restrict the analyses displayed.

2. Select Tab View from the context menu.

The details of the analysis are displayed.

You can:

- Edit the analysis, see Editing the Analysis on page 162.
- Execute the analysis, see Executing an Analysis on page 155.

Executing an Analysis

Learn to execute and analysis.

To execute an analysis:

- 1. Load an analysis, see Loading an Analysis on page 155. 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			R	Results (10 record(s))		X8 -
Category Type 🗸			Туре	Count Activity	Sum Duration	
Values				Visit	435	2.829,00
Count (Activity)	Count (Activity) Sum (Duration)			Letter	259	617,00
Sum (Duration)				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
Add	Edit	Delete		Internet	1	0,00
Filter					929	5.283,00
Туре	all	~				
Status	Completed	~				
Starts on from		~				
Starts on to		*				
		>> Run				

5. Click on Export (IM) to export the data as either CSV or XML, depending on your settings, see 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 155.
- 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 dh	n I
	Туре	
	Starts on (monthly)	
.y)	Starts on (quarterly)	
n)	Starts on (yearly)	ŝ
	Starts on	ŝ.
	Country	
		12.

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		
Туре	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 155.
- 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.

Category "Type"												.dt
Category					Bar (2	D)		~ ×	Show L	egend 🖌	Show Valu	les
0	Category	Туре		¥								
Values					300							
Count (Activity)												
Sum (Duration)	Sum (Duration)				250							
						210						
					200							
					150	_						
					100							
Add	Ed	iit	Delete			62						
ilter					50		29					
Т	ype all			~			9	10 13	4 6	3 0	2 4	1 2
	tus Com	pleted		~		Visit	E-mail	Letter	Fax	Social	Service	Event
Starts on fi	rom			~		AIPIC	C-III4II	rettel	FdX	Activity	Visit	Event
Starts on to 🗸				~			11.	Count Acti	ivity 📊	Sum Dural	tion	
	Country Germany V		~									

Defining Analyses

Learn to define an analysis.

To define an analysis:

- 1. Select (Queries & Analyses) > New Analysis.
- 2. The New: Analysis window is displayed.

■ New:Analysis * ✓ Save × Delete ≫ Run Analysis								
Analysis name			🕽 Private 🔘 Publi	ic				
Query name	Select a query	Q						
≫ Run Analys	s							

- 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).
- Click on Q (Select) next to the Query name field and select the query to base your analysis on.

Various settings are displayed:

Kew:Analysis *	n Analysis					
nalysis name	in Analysis		Private	Public		
uery name PE_MA (Pub	(ic)		9	- Grand		
Categories, Values, Filte	r List					
Categories		Hide unused	Values			= Hide unused
-	Disable	e Show all			Currency-dep	Percentage-de
🗹 Last Name (Person)			 Activity 	Count		
First Name (Person)			Person	Count		
Country (Person)			Filter			= Hide unuser
Date of Birth (Person)					Filter must be se	elected
 Type (Activity) 			Last Name (Perso	n)		
Status (Activity)			First Name (Perso	n)		
Starts on (Activity)			Country (Person)			
			Date of Birth (Per	son)		
			✓ Type (Activity)			
			Status (Activity)			
			Starts on (Activity)		
Default Values						
Maximum number of bars	10		Default for category		~	
Currency field	not selected	~	Percentage field	not selected	*	

- 6. Configure the settings as desired. The following options are available:
 - Categories, see Defining Analysis Categories
 - Values, see Defining Analysis Values
 - Filters, see Defining Analysis Filters
 - List, see Defining the Analysis List View
- 7. Save the analysis.

Defining Analysis Categories

To define the categories in an analysis:

- 1. Define an analysis, see **Defining Analyses** on page 158 or load an existing one.
- 2. Define the categories in the Categories area:

Categories	Hide unused			
	Disable	Show all		
✓ Last Name (Person)				
First Name (Person)				
✓ Country (Person)				
Date of Birth (Person)				
✓ Type (Activity)				
✓ Status (Activity)				
✓ Starts on (Activity)				

- 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, see **Defining Analyses** on page 158 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
 Activity 	Count		
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, see **Defining Analyses** on page 158 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			
🖌 Last Name (Person)					
First Name (Person)					
✓ Country (Person)					
Date of Birth (Person)					
✓ Type (Activity)					
✓ Status (Activity)					
✓ Starts on (Activity)					

- 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 158 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			Display All
	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%	

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 155.
- 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, >> Executing an Analysis on page 155.
- 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.

Re	sults (10 record(s))		XII ~
	Туре	Count Activity	Count Person
	≣ Menu ×	1.204	84
E	Drill down Starts on (monthly)	510	127
	Drill down Starts on (duarterly)	406	102
	Drill down Starts on (yearly)	161	34
	Drill down Starts on	74	4
	Drill down Country	54	8
	Event	47	10
1	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.

Re	esults (10 record(s))		×II ~
	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
1	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 201	2") (Category "Country"		
Category		Results (8 record(s))		10 v
Category Type	~	Country	Count Activity	Count Contact Pers
Values		Austria	78	35
Count (Activity)		Hungary	13	5
Count (Contact Person)		France	8	2

Displaying the Details of an Analysis

To display the details of an analysis, you need to determine the fields that are displayed when defining the analysis, >> Defining the Analysis List View.

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))					X V
1	Last Name	First Name	Туре	Country	Status	Date of Birth
∎ = 3m	Aki	Chris	Visit	Italy	Sched	
Display De	etails	Chris	Visit	Italy	Compl	

3. Click on • (Display Details) to display an entry's MiniDetails.

Results (7	record(s))					XII ~
1	Last Name	First Name	Туре	Country	Status	Date of Birth
₽≡ ^	Aki	Chris	Visit	Italy	Sched	
Acad. Title	5	Language English		Nationality		
Date of Bi	07.02.1977	Rep		Office Rep		

Quick Add

The quick add function allows you to easily enter items (e.g. POS monitoring items) without needing to add item records individually.

To use the quick add function, you first need to add the parent record (e.g. POS monitoring record) 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 some areas, the quick add function has been customized for a specific process. These areas are covered in the corresponding topics; this section applies to the standard implementation.

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.

All	Overview	Last Entries					-	 To	Total	Total Out	Total Quant
	Item Item No.,	Item Name		Product Group		+ •					The rotal Quant
	+ Add more		v					 	0 0 I'm	o o I'm de	o o I'm done
fax. 15 ¥ R	Records / Page				Reset	Start Search					

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:

AII	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 also 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 in the Quick Add Area

The quick add area is similar across all applicable info areas. The following example describes using the quick add area to enter POS monitoring items.

To enter data in the quick add area:

- 1. Switch to the desired activity and select **Call Documentation** from the context menu.
- 2. Switch to the POS Monitoring phase.

The quick add area for POS monitoring items is opened.

All	Overvie	sw Specia	l Offer Las	t POS Monitoring	Listing		
Item No.			Item type	+ 、	,		_ 0
Item name Product type		+ ~	Brand	+ 、	Product	+ ~	
+	Add more	. v					
ax. 15 ¥	records per p	bage				Start Search	
« < 1 - 1	5 of 15+ > >	0				D	Duplicate Record 🗙 Delet
4	mage	Item No.	Item name	Out of stock	Stock	Facings Facing space	
		1234	Update Powe				
× 0		1234 3214	Renni Power				

- 3. Restrict the items that are listed:
 - Enter search criteria and start the search to restrict the listed items.
 - Click on one of the special filters above the search criteria to apply that filter to the listed items, >> Special Filters on page 165.
- Click on the item you want to add, and enter the desired values (facings, shelf price) directly in the list.

Note: If you enter a quantity of 0 (zero) in an existing item, you are asked whether you want to delete the item or to replace the previous value with 0.

Information such as the number of items ordered, the total quantity and the net price are displayed next to the shopping cart (top right).

- 5. If you switch to the next item, your entries are saved automatically. You can also use the Ø (Cancel) and ✓ (Save) buttons. A small shopping cart icon is displayed in those rows where data has been entered.
- 6. Further information on the currently selected item is displayed under **Related Items** beneath the list (if present).
- **7.** Once you have entered all the items, click on **I'm done**. If this button is unavailable, data is saved automatically.

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:

n Name	e + ~	Product Group	+ •	Total Quantity 112,00 Net Total 4.320,00
<< <	1 - 2 of 2 🔉 🔊			
1	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
				<t -="" 1="" 2="" <="" of=""> 2</t>

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).

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 message 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 representative if you want to acquire Social CRM.

Social Inbox

To access the social inbox:

1. Select (Marketing) > Social Inbox.

The social inbox is displayed.

	3		/		
P Se	earch Social Message				~
🔁 Mari	k As Read 📆 Mark As Spam 🍖 Show S	Spam 🛛 🗘			
1	Title	Content	Author	Lecture Su	Source
	O GACME Hello ACME; I do have	@ACME Hello ACME, still have no information of y	Hans Schreiber		
	O Do you have more of these vid	Do you have more of these videos, our laboratory	Hans Schreiber		
	Problem with adjusting the ce	Hi, I have a problem with the adjustment of the c	Hans Schreiber		

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 reads the individual twists and needs 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 an further processing is necessary, e.g. whether a medical inquiry 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 medical inquiry or idea is added, as adding a medical inquiry 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:

			<u> </u>			
Search Social	Message					
earch Results						
	Mark As Spam 80 Show Sp					
p ⁹ Title	Content		Author	Lecture Su So	urce f	Person
•	-	nt of Hansgrohe North America st	_			
•		eratons in Germany have Hansgro	_			
•		where can I meet you at the next	MKaymer_US			
0	UB created an ACME_H		ACHE		1	<u>tr. Admin Admin</u>
•	-	on de: Hansgrohe Metaflex Brause				
•	-	ohe Technical Tip: How to clean a	-			
문 🗸 🚯 Sep 6, 2	013 12:32pm Sep 6, 3	12:32pm Pipettes hints from.	I PAINE		,	tr, Admin Admin
wist Messages			P p	CME: Sep 6, 201	3 12:32pm	
wist Messages > Move Twist to "Eng	age" 📢 Mark Twist as Spar	m 4 ₀ Assign Person 50 Close Twist		ipettes hints from	3 12:32pm	
wist Messages Move Twist to "Eng Date	age" 👯 Mark Twist as Spar Time Author	m 4 ₀ Assign Person 😡 Close Twist Content He			3 12:32pm 11	
wist Messages Move Twist to "Eng Date	age" 📢 Mark Twist as Spar	m 4 ₀ Assign Person 50 Close Twist		ipettes hints from O D Site www.facebook.co	3 12:32pm n	
wist Messages Move Twist to "Eng Date	age" 👯 Mark Twist as Spar Time Author	m 4 ₀ Assign Person 😡 Close Twist Content He		ipettes hints from	3 12:32pm n m Message. Sentimen 12pm	. Initial t 🖗 Unknown
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• **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 **P** (**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 **1** (Mark As Spam or Mark Twist as Spam).
- Click on *o (Show Spam) in the search results header to display messages marked as spam. The button changes to o (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 **D** (**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 a (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, >> Linking Messages to a Person on page 173.

To send a message to an author:

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

Send reply	r to bigscreen [Sarah Social]	×
Title	Your request	
Content	Hello Nick,	G
	we received your last request, we are currently evaluating the different options.	
	Thanks & have a nice day, Sarah Social	
	Outbound may not be possible	
	Send	Cancel

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 medical inquiry. You can also link the message to an existing medical inquiry if the problem is already known. Once the medical inquiry has been added, the twist is automatically moved to the **Process** phase.

The medical inquiry is then processed by the responsible service employee, >> Customer Service in the vertical-specific manual.

To add a medical inquiry:

- 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 Medical Inquiry**) and choose whether to add a new medical inquiry or link the message to an existing medical inquiry.
- 4. Enter the medical inquiry's details and save it.

This medical inquiry needs to be assigned to a service employee. Once the medical inquiry 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 medical inquiry 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.
- Click on Q (Select) next to the Medical Inquiry or Idea field to select the record you want to link the twist to.

When linking a twist to a medical inquiry or idea, activities of the type **Social** are added automatically and are linked to the medical inquiry or idea.

Sending Feedback to an Author

Once a medical inquiry has been processed, the **Write Feedback to Social Inbox** option is available in the medical inquiry (provided it 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.
- 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:

1. Select (Marketing) > Social Inbox Flow Analysis.

The analysis is displayed.

Idea Management

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.

Searc	:h Idea						~
earch F	tesults			ø ch	ange Community Stage	🖥 New Idea 🕱 🗸	Modify List Fields
ø	Title	Person	Company	Created on	Created at	Created by ID	Social Commu
₽≡ ◄	O 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
elated		nternal Colutions X	Community	ommente X Co	mmunity Calestians X	Carial Activities	
Interna	Comments × 1	nternal Solutions \times	Community C	comments × Co	mmunity Solutions ×	Social Activites	×OO
						1	Comment 1 Browse

- 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 \oplus (New Idea) in the idea management process.

The input mask is displayed.

⊽ Idea	a Managemen	t OBacklog	Evaluation 0	Rea	o	Archive	^
\$ 	New: Idea						
Ĩ	Titl	e My Idea I have a great idea concerning	product line A, you	should			
	Perso	Mr. Hans Schreiber	Q, <mark>X</mark>	Company (Customer	Q, X	t

- 2. Enter a name for the idea in the **Title** field and a description in the **Content** field. Click on **Q** (**Select**) to link the idea to a **Person** or **Company** in the database.
- 3. Save.

The idea is added to the **Backlog** and can be processed.

Sending Feedback to the Social Inbox's Rep

If an idea was added by the rep responsible for the social inbox (the idea is linked to a twist), you can send feedback. Based on the feedback you provide, the rep responsible for the social inbox can contact the author who originally submitted the idea.

To send feedback:

- 1. Select the desired idea.
- 2. Click on 🧟 (Feedback) This button is only active if an idea is linked to a twist.
- 3. Enter the text.
- 4. Save.

Changing the Community Phase of an Idea

To change the community phase of an idea:

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

Sear	rch Idea						
earch	Results			ø ch	ange Community Stage	🖥 New Idea 🛛 🕱 🗸	O Modify List Fields
P	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
lated	Data						• ~ =
Intern	al Comments ×	nternal Solutions ×	Community C	comments × Co	mmunity Solutions \times	Social Activites	× OO
						16 2	Comment 🕒 Browse

- **3.** Switch to the desired tab and click on \oplus (**New**) to add a new record.
- 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, >> News Feed in Aurea CRM web on page 180.
- Feeds are collated to form a project in Yammer, >> Projects in Yammer on page 181.

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

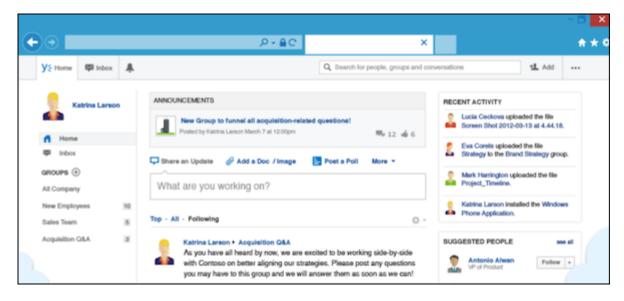
News Feed in Aurea CRM web

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

Compar	ny My Social Company		
≡ 💉 🗸 🥝			
 Name Company 	y My Social Company	Logo	J
Addres	s Bar 123 Vienna	ومروقا والمروقا والم	
Parent Da	ita Related Data	~~~~	▶ ~ ≡
y≑ Like	Y € Followed		
Write s	omething about My Social Company		
T.	Peter Product this is the next comment		
	Unlike · Reply · View Conversation · 40 seconds ago from BASE_TEM	PLATE	
	Peter Product: this is a comment to a comment 20 seconds ago from BASE_TEMPLATE - Like - Reply		
	Write a reply		
T	Peter Product this is a comment on a company		
	Like - Reply - View Conversation - 1 minute ago from BASE_TEMPLAT	Έ	

Projects in Yammer

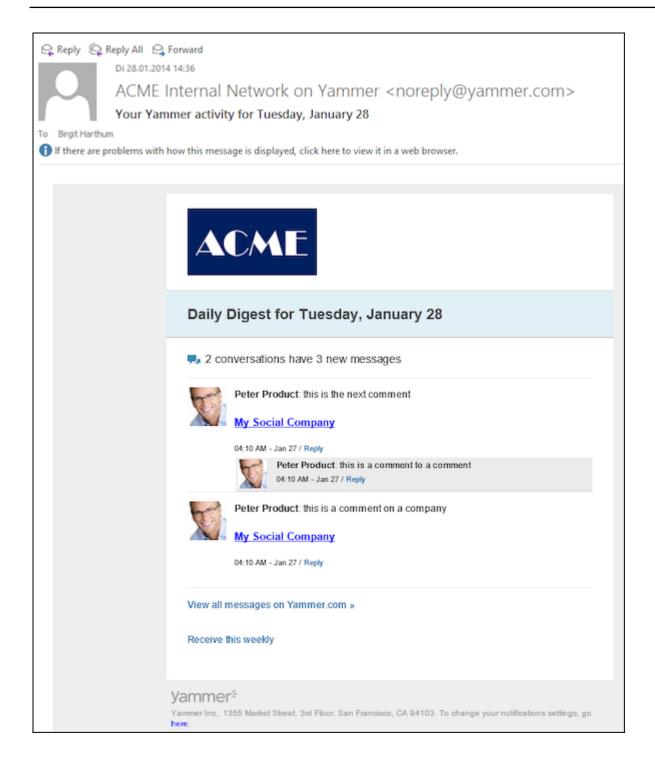
All registered users' news feeds are displayed in Yammer at www.yammer.com/<Your Company>.



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.



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.

							\$1000
ar 175							
New Loads	Been Opper, had 10 days	Average curbiner validacion	Average A customer satisfacts		an visits for work opps, 12 month		
Rea Confidences	Contamers With Orders	a sequence		Transform .	-	Renor tongs	·
100							
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1	() Taken	() Appendication					
Was Spps. Tear	() to back of out open and	() Panishad sind squarks work					
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au 1775							
Placed cole fits week	()Rusher of state	() Analyzed Schele					
fran Oppe duration							
	-						

You can find the following metrics displayed in the KPI dashboard under various categories:

KPI Cate- gory	Туре	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.

KPI Cate- gory	Туре	Name on the dashboard	Description
General	Query	Customers With Orders	Number of customers have placed total or- ders 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 pre- vious year (measured per calendar year).
General	3D Bar	Average A-cus- tomer 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.

KPI Cate- gory	Туре	Name on the dashboard	Description
Sales Rep	Query	Unfinished visit re- ports week	Number of unfinished visit reports for this week for the current sales representative.
Sales Rep	Query	Finished visit re- ports 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 repre- sentative.
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 repre- sentative.
Service Rep	Query	Assigned tickets	Number of assigned tickets.
Manage- ment	3D Bar	Median Opps Dura- tion	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.

CRM.launcher

CRM.launcher (included with Aurea CRM web) is required to perform certain actions in the application. The first time you initiate an action that requires CRM.launcher, a message that CRM.launcher needs to be installed on your computer is displayed. You can install CRM.launcher by clicking the link in this message, >> Installing CRM.launcher on page 188.

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. Aurea software recommends using Google Chrome as your browser, as problems may occur under certain circumstances when using Firefox.

Installing CRM.launcher

To install CRM.launcher:

1. Perform an action that requires CRM.launcher, e.g. check out a document.

The following message is displayed:



2. Download the application and execute 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.

Security W	arning
	You are about to install a certificate from a certification authority (CA) claiming to represent: localhost Windows cannot validate that the certificate is actually from "localhost". You should confirm its origin by contacting "localhost". The following number will assist you in this process: Thumbprint (sha1): C277DF64 42AB1685 38767B17 CFBB0531 3F694852 Warning: If you install this root certificate, Windows will automatically trust any certificate issued by this CA. Installing a certificate with an unconfirmed thumbprint is a security risk. If you click "Yes" you acknowledge this risk. Do you want to install this certificate?
	Yes No

5. Return to Aurea CRM web and perform the action again.

CRM.launcher in the Windows Taskbar

Once you have started CRM.launcher, the (CRM.launcher) icon is displayed in the Windows taskbar on the right. Right-click on the icon to access the available functions:

- 1. Right-click on 🖲 in the taskbar.
- 2. Select the desired option:
 - Check for Updates, >> Check for Updates on page 190.
 - Open offline CRM or Open online CRM, >> Starting Aurea CRM web offline in Offline or Online Mode on page 192.

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

- Settings, >> Switching Languages on page 190, Creating Bug Reports on page 191 and Port Settings on page 191.
- 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:

🚗 CRM.launcher	- • •
Open offline CRM Open online CRM	O pdate
Success!	
Your version is up-to-date.	
	ок

Switching Languages

To change the language:

- 1. Right-click on the CRM.launcher icon (a) 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.

 Enter a path for the log file in the Bug report zip file field and enable the check boxes to determine what to include in the file (CRM.designer configuration, CRM database, Log files). By default, Log files is enabled.

Note: Including the CRM database in the file may take a long time and require significant storage space on your hard disk.

- 4. Click **OK** to save create the ZIP file.
- 5. You can then send the file to your administrator.

Port Settings

Note: Only change these settings if requested to do so by your administrator! Your administrator should provide you with information on which port to enter.

Your administrator can determine that you cannot change the port.

Closing and Restarting CRM.launcher

If CRM.launcher is already installed, but you are unable to perform actions requiring CRM.launcher, verify that CRM.launcher is running (the 🛋 icon is displayed in the system tray). If the icon is not display, start CRM.launcher from the Windows Start menu.

If CRM.launcher is active, and you are notified that a new version can be installed, you need to close CRM.launcher before installing the new version. Click on and select **Exit** from the popup menu to close CRM.launcher. CRM.launcher is automatically started after installing the update.

Uninstalling CRM.launcher

If necessary, you can uninstall CRM.launcher from Window's control panel (as with any other application).

Using CRM.launcher with Mozilla Firefox

If you are using Mozilla Firefox, you may be unable to perform actions (e.g. check out a document) despite CRM.launcher being installed. In this case, switch to another browser (Google Chrome or Internet Explorer). If you need to work with Mozilla Firefox, contact your administrator.

Aurea CRM web offline

Aurea CRM web generally accesses data in the database in online mode. Depending on your tasks (e.g. if you are often in the field) and your network connection, you may not always have online access to the database. You can work in offline mode instead in such cases.

Note: In order to work in offline mode, you require Aurea CRM web offline. Aurea CRM web offline is not included with Aurea CRM web by default. Contact your Aurea representative if you wish to acquire this add-on.

Starting Aurea CRM web offline in Offline or Online Mode

To start Aurea CRM web in either online or offline mode:

1. Start Aurea CRM web using CRM.launcher. Two options are available:

- Click on either (Open offline CRM) or (Open online CRM) after installing the latest version.
- Select on either **Open offline CRM** or **Open online CRM** from CRM.launcher's context menu.
- 2. The system then checks when data was last synchronized, and you can choose whether you wish to synchronize data. You can only synchronize data if you can connect to the online database.

Note: Synchronize your data as often as possible. Note that depending on your network connection and the volume of data you are synchronizing, the synchronization process may take some time.

- 3. Click Offline Synchronization to start synchronizing.
- 4. Once synchronization is complete, you can choose to use Aurea CRM web in online mode or to switch to offline mode.

Administrative Tasks

You can perform administrative tasks in Aurea CRM web. However, you require the necessary access rights to do so, >> Roles and CRM Processes on page 18. If you do not have the necessary access rights, contact your system administrator.

For further information on administrative tasks (including those not described in this manual), >> Aurea CRM web Administrator Guide.

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 topics of the User Manual.

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.

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.

- 1. Select (Master data) > Checked Out Documents.
- 2. Select the desired document and undo the check out.

LSI Configuration

Use the **LSI Configuration** area to define parameters that are taken into account when planning calls. For example, you could assign a country to a rep; when planning calls, calls are only added for this rep for customers in that country.

Select Settings () > Maintenance > LSI Configuration to list the current parameters.

You can edit existing parameters as required (e.g. define work hours for your sales staff) and add new parameters.

Variables

You can define variables and values that change according to the current rep's data (e.g. country, tenant etc.).

These variables can be used in various areas in Aurea CRM, such as workflows, triggers and reports. For example, a trigger can be used to display yearly revenue figures for the current rep's country or enter a variable value in a specific field.

For more information, >> CRM.core Administrator Guide and the Aurea CRM web Administrator Guide.

Defining Variables

To add a new variable:

- 1. Select Settings () > Maintenance > Variables .
- 2. Start the search and click on \oplus (**New**) in the search results' header.

🕺 New: Variable	New: Variable						
√ Ø							
Name	Text - Variable						
Description					1		
Info Area Code	MA	Q, ×	Info Area	Activity			
Field Number	0	Q, <mark>×</mark>	Field Name	Туре			
Lock							

- 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 \oplus (New) on the Variable Value tab.

x'æ	New: Variable	Value		
~	0			
	Info Area	Activity	Field Name	Subject
	Stat. No.		Station	Q, X
			Tenant Name	Q, X
		2	Rep ID	2
			Language	Q, 🗙
	Country	~	Login role	Q, 🗙
	Default			
ſ	Variable Value			
	Catalog Text	Q, 🗙	Var. Rep ID	2
	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.

- 3. Enter the variable value in the lower section.
 - For numeric, date, time, rep and Boolean fields:

Variable Value			
Catalog Text	Q, 🗙	Var. Rep ID	2
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.

Variable Value			
1st Par.Cat.Text		Parent Catalog	
Catalog Text	United Kingdom (BASE)	🔍 🗙 Var. Number/Catal	2

Click on **Q** (Select) to select the desired value.

• For fixed catalogs:

In order to display the input mask for fixed catalogs, you first need to save the variable value.

Variable Value	
Index of Catalog V	Catalog Value Telephone

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.

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.

- Click on A (Show/Hide Columns) to determine which columns are displayed in the list.
- 4. Enter all or part of the field name you want to edit in the search field to restrict the listed fields.
- 5. You can only edit the name in the languages you have been granted access to by your administrator. Click on the desired field. The field's name in all languages is displayed on the right.
- 6. Click on (Help) to display information on how you can reuse existing field names.
- **7.** Click on **</** (**Apply all changes**) to apply your changes to the data model.

Catalog Maintenance

Catalogs can only be maintained on the catalog maintenance station. Ask your system administrator which station is your catalog maintenance station, >> CRM.core Administrator Guide.

Catalog maintenance in Aurea CRM web covers the following tasks:

- Add new catalog values
- Edit existing catalog values (except in the base language)
- Define how catalogs are sorted
- · Lock/unlock catalog values and edit external keys

Your access rights determine which catalogs you may edit and in which languages.

Note: You cannot merge or delete catalog values in Aurea CRM web. You also cannot edit texts and external keys in the catalog base language.

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.

Find or Add Catalog Value	×
Field Company type of Company	
	Q, Find
	*
Beverage market	
Beverage market	
Channel of distribution	=
Gastronomy	
Headquarters	
Hotel	
Node	
Office	-
New value in TE_English_CG:	
New value in base language TE_CATALOG_BASE_LANG:	
	New
Go to Catalog Maintenance	
Select	Cancel

- 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 sea	arch is dis	; -				
	+ Catalog I	Maintenance				0
	Info Area		~	Catalog		*
	TenNo			External Key	(
	Text		1	TE_CATALOG_BASE_LANG	<i></i>	
	CU_German [CU_English		
	CU_French [CU_Spanish		
	CU_Dutch [CU_Italian		
	CU_Polish [CU_Japanese	1	
	CU_Chinese [
played.	Max. 15 ¥	records per page				Start Search

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

		Edit value fo	or catalog "Expe	ense Budget Type		×
	Catalog "Expense Bud	get Type" (No. 5069)	is used in: Rece	ipt, Call Expense, Ex	pense Budget	
	Base language - TE	_CATALOG_BASE	LANG:			
	Text	Meal (BASE)		Catalog Code 2		
	External Key	10002_5069_2		Sort 0)	
	TenNo	9000		Lock		
	Description	LSI&CG				
	Valid from		~	Valid until		~
displayed:			<	>	Save	Cancel

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.

Adding New Catalog Values

To add a new catalog value:

- 1. Search for the desired catalog, >> Maintaining Catalogs on page 199.
- 2. Click on \oplus (New) in the results list.

The **New value for catalog** dialog is displayed.

- 3. Enter the new catalog value's data in the catalog base language and then enter any translations.
- 4. Save the record.

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 need to be assigned to a new rep. You can apply a mass update in order to search for and assign all the old rep's customers to the new rep in a single step.

Note: If you only wish to update a small number of records, you can also use the functions described in Editing Multiple Records in the List Simultaneously. The mass data update function is intended for large volumes of data.

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

Note: Mass updates are applied asynchronously via CRM.server.

Performing Mass Updates

To carry out a mass update:

- 1. Select Settings () > Maintenance > Mass Data Operations .
- 2. Select the info area the changes should be applied to and click on Show Search.
- **3.** Enter your search criteria or define a filter, >> Searching on page 63.

- 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.

Mass Data Update Fiel	ds to be Changed	□ ×			
✓ Start mass update + A	✓ Start mass update + Add fields				
Туре >	Telephone	*			
Starts on >	(~			
Starts at >	(
Ends at >					
_	Scheduled	~			
Subject >	۱ <u>ــــــــــــــــــــــــــــــــــــ</u>				

- 7. Enter can add further fields to this dialog, >> Adding Fields on page 202. Click on X (Remove Field) to remove a field from the dialog.
- 8. If you enter a new value to be entered in the field, the check box to the left of the field is enabled automatically.
- **9.** Enable the check box without entering a value for the field to remove existing values in that field.
- 10.Click on Start Mass Update.

You 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.

Select	Field		□ ×
Search	Field Name Q		•
No.	Field Name	Field Type	
7004	My Custom Percentage Field	Numeric	L A
7003	My HTML Field	Text	E
7001	04_SerNo	Numeric	
7000	04_StaNo	Numeric	
4005	Currency	Catalog	
170	VR_SerNo	Numeric	
169	VR_StaNo	Numeric	
168	Social Outbound Key	Text	
167	URL	Text	
166	GUID (Twist)	Text	
165	External ID (Post)	Numeric	
164	GUID (Social Message)	Text	
163	Social Activity Type	Catalog	
162	Social Communication Layer	Catalog	-
		Apply Canc	el

- 2. Restrict the list of fields by entering the field name (or a portion thereof) in the search field.
- 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 .
- Select the info area, define your search criteria or a filter and verify that you want to delete the records in the list, >> Mass Data Updates on page 201.
- Click on × (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

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

To import data:

1. Select Settings () > Maintenance > Import .

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

The Import dialog opens.

Form	at FI	Q, <mark>X</mark>	File Select F	File No file selected
elds in th	e selected form	nat		
osition	Info area	Field Name	Length	Transformation
	Company	Ext. System	80	
	Company	External Key	80	
	Company	Company	120	
	Company	Synonym	30	
	Company	Country	80	
	Company	Postal Code	10	
	Company	City	40	
	Company	Country Code	6	
	Company	Area Code	6	
	Company	Telephone	40	
0	Company	Rep 1 ID	10	
1	Company	Revenue	13	
2	Company	Employees	13	
3	Company	ABC	1	~
4	Company	Lead Status	255	
5	Company	FreeC1	20	~
-	<u>_</u>		~	
Separator		Fie	ld format	
	Record Cr/Lf	~	Date	
	Field ;	~	Time	
Field	d border	~	Decimal sep.	

2. Select the desired import format from the **Format** field. The fields defined in the import format are displayed and provide you with information on how the import file needs to be structured. The **Transformation** field indicates whether data in a selected field is transformed during the import process.

Note: Formats are defined by your administrator.

3. Click on Browse to select the file to import.

Click on \times (**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 tooltip containing the entire contents of a field if the field contents are too long to be displayed completely.

8. Click on **Execute** to import the data into the database.

Note: The import cannot be undone.

Viewing the Import Log File

Whenever you import data, all changes are written to a log file.

To view this log file:

1. Click on 🌇 (Show Log) after importing the data.

The log record is displayed.

Note: You can also access the logs from the **Communication Log** option in the administration menu.

2. Select Create Report from the menu.

The contents of the log file is displayed in a new browser tab.

Import Results

If errors occur during an import, import results records are added.

These errors are displayed under **Import Results** in the **Related Data** area and contain the row number and corresponding error message.

Select **Open Affected Record** from the context menu to switch to the import result record.

Exchange Rate

Aurea CRM allows you to use multiple currencies in parallel. Exchange rates are used to convert values between currencies.

Select Settings () > Maintenance > Exchange Rate to manage exchange rates.

100 C	Currency	Base Curre	Conversion
	EUR	EUR	1,0000000
	GBP	EUR	0,8000000
	JPY	EUR	117,3200000
	USD	EUR	1,3210000

Currencies are converted using so-called **base currencies**.

Example: The base currency is euro. Using the exchange rate defined above, you can convert yen to euro. You can also use this record to convert from euro to yen, or from yen to any other currency that has an exchange rate entered for euro.

Note: For further information contact your administrator.

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.

Managing Reps

You can add new reps or edit existing reps' data, e.g. to assign a different telephone profile or access rights.

To edit a rep's data:

1. Select Settings () > Maintenance > Reps .

	Rep		Organiz	ationa			2	Superior		2
Busir	ness area		+ 🗸 🛛 10	D-TenNo				Language No.		
	+ Add mor	e	~	With me						
lax. j	10 Y records per	page						Rese	t Sta	rt Search
ear	chResults « <	1 - 10 of 10	+ > >0	+	New Rep	+ New R	ep (without l	.ogin) + New Resou	irce + New	
Ø.	Rep	Person	Organizatio	Ту	Supe	Busine	ID-Te	Tenant Name	Langua	Langua
	Adam Aussend	Arno Ad	Sales Rx Team	Em	Bella	Rx	9500	Demo German - LSI	100	TE Germ
	Adam Aussend	Adam Au	Sales Rx Team	Em	Bella	Rx	9100	Test German - LSI	100	TE Germ
	Arno Admin (9	Arno Ad		Em			9100	Test German - LSI	101	TE Engli
	Arno Admin (9 Arno Admin (9	Arno Ad		Em			9100 9500	Test German - LSI Demo German - LSI		TE Engli
		Arno Ad								
	Arno Admin (9	Arno Ad		Em					100 100	TE Germ
	Arno Admin (9 Arno Admin (S	Arno Ad	Key Account M	Em Em	Bella	Rx	9500	Demo German - LSI TEMPLATE MAIN - L	100 100	TE Germ TE Germ TE Engli
	Arno Admin (9 Arno Admin (S Arno Admin (T	Arno Ad Arno Ad Auqust A	Key Account M Key Account M	Em Em Em			9500 9000	Demo German - LSI TEMPLATE MAIN - L	100 100 101 100	TE_Germ TE_Germ TE_Engli TE_Germ
	Arno Admin (9 Arno Admin (S Arno Admin (T August Account	Arno Ad Arno Ad Auqust A		Em Em Em			9500 9000 9500	Demo German - LSI TEMPLATE MAIN - L Demo German - LSI	100 100 101 100	<u>TE Germ</u> <u>TE Germ</u>

- 2. Click on the filters (**Reps**, **Groups**, **Resources**) in the search area to restrict the results to employees, groups or resources.
- 3. Select the desired record.

You can edit contact data, settings, work hours and access rights. You can add a login and assign roles to reps, maintain the login centrally, assign additional tenants and define the expense budget available.

4. Save the record.

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 \oplus (New Rep) to add a new record and start the process.

New Rep	Select Account	Select Person			
Select the sys	em company				,
Account name Acc	ount name, Synonym	Account type		+ ~	
Filter 🗙 Syst	em Company	+ Add m	nore	~	
Max. 15 👻 records p	er page				Reset Start Search
Search Results					+ New Account
Account t	/pe Account name	Postal Code	City	Street	Telephone
Other	UPDATE SYSTEM C	O 1040	Vienna	Operngas	sse 17

3. 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.

4. 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.

- 5. 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.
- 6. The Add Login phase allows you to assign a login name and password (mandatory).

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.

- 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.
- 8. Click on **Do not add roles** if you do not want to assign roles to the rep. In this case, the roles need to be assigned later.
- 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

To add a new rep, group or resource:

1. Click on \oplus (New Rep (without Login), New Group or New Resource) in the rep search results.

The input mask is displayed. Less fields are available for groups and resources.

- 2. Enter the data. Which fields are available depends on the type of record:
 - For reps: Enter data such as the rep's name, address, superior, deputy etc.
 The following fields are used by the following CRM processes:
 - E-mail : Required for SaaS customers.
 - City: Used by the call planning CRM process
 - Superior: Used by the approval process.

Note: An employee must always be linked to a person in the Aurea CRM database via the **Person** field.

- Group: Enter the name of the group in the Rep (name).
- Resource: You can determine whether the resource is only available internally or is public, for example.

Note: The type is assigned automatically when adding the record and cannot be edited.

- **3.** You can set reps, groups and resources as **Inactive** (e.g. if an employee leaves your company).
- 4. You can enter additional information on the following tabs:
 - **Rights :** You can assign a default language, tenant, and station, group and rep access rights etc.
 - Use the **Customer/Country Rights** field to assign group access rights by selecting the desired group.
 - **Settings**: You can assign a default telephone profile (if you are using CRM.phone), define Aurea CRM web offline settings and the rep's signature used in e-mails.
 - Working Hours: You can define work hours for an employee (e.g. part-time staff).
 - **update.CRM**: Enable the **Billable** field if adding the rep represents a service for which the customer is invoiced.
 - **Geo-coordinates**: The geo-coordinates of the address entered under **Contact Data** are displayed here.

Additional Rep Information

You can store additional information on reps, e.g. the business area the rep is responsible for.

To enter additional information:

- 1. Switch to the desired rep.
- 2. Switch to the Rep Additional Info tab under Related Data.
- 3. Click on \oplus (New).

The input mask is displayed.

4. Enter the rep's Business area (e.g. OTC or Rx). You can also determine whether the rep has access to a company or private car, the territory the rep is responsible for etc.

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 \oplus (New).
- Click on Q (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.

Sear	ch Results	
	Name	Login role
	TE_Administration_LSI	Administration
	TE_Administration_Catalogue_LSI	Administration Catalogue
	TE_Analytics	Analytics
	TE Backoffice LSI	Backoffice
	Menu X	CRM Social Productmanager
	Lore (remplate)	Customer Core
	CU_Country (Template)	Customer Country

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 \oplus (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 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 \oplus (**New**) to assign additional tenants.

Defining Expense Budgets

You can determine that a rep has a certain budget available for expenses. To do so:

- 1. Switch to the desired rep.
- 2. Switch to the Expense Budget tab under Related Data.
- **3.** Click on \oplus (**New**) in the search results.
- 4. Expense budgets are defined for a particular year and a particular budget type.
- You can define budgets for other time periods (e.g. a quarter) To do so, select All Fields from the expense budget's context menu and enter the start and end dates in the Period End and Period Start fields.

Managing Login Roles

You can define login roles and assign access rights to these roles. You can then assign the role to users or user groups.

To add a new login role:

- 1. Select Settings (Maintenance > Login Roles .
- **2.** Click on \oplus (**New**).

The input mask is displayed.

Fred		Rights Format		+ ~ Q X
		Undeted on		
	*			*
			Rights Format Read only	Rights Format Read only Updated on

- 3. Enter a **Name** for the login role. Select a **Login role** if you want the login role to inherit the settings assigned to another role. The access rights defined in both login roles are then combined.
- 4. Click on Q (Select) and select an access rights format.
- You can set the login role to Read only or Inactive and enter a Description of the role.

Configuring Logins

Reps require a login in order to log on to the system.

To configure a login:

- 1. Select Settings () > Maintenance > Logins .
- 2. Search for the rep whose login you want to configure.
- 3. Click on \oplus (New).
- 4. Enter a user name, assign a password if required etc.
- 5. Define which Aurea CRM modules the rep can access under Module Access Rights.
- 6. Define the login's password settings on the Password Settings tab. Enable the PW Update next login field to determine that the user needs to change their password the next time they log in. Use the Frq. PW Update in days to determine how often users need to change their password etc.
- **7.** Use the options under **Lock** to restrict access, e.g. to lock the Windows module to prevent the rep from accessing it.

Tenants, Languages, Countries, Cities, Stations and Station Configurations

For more information on these elements, >> CRM.core 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.

Customizing the Field Help

Aurea software includes a Microsoft Excel file that includes descriptions of the fields in the standard version of the software. This Excel file has already been imported into your Aurea CRM database, meaning that users can access the field help. The field help is displayed as a tooltip when hovering the mouse over a field name.

You can edit the default field help:

1. Select Settings () > Maintenance > Field Help .

The search is displayed.

2. Search for the desired field using the Info area code/Field Number.

The field help is displayed in your current language.

Activi	ty Field No.:2			
11	0			
Overv	iew			
Info	area code MA		Field Number 2	
	Info Area Activit	Y	Field Name Type Reference	
	Short Text Type	of activity (visit, phone call, I	letter, event, fax, e-mail, info).	
	Long Text update	CRM win:		
	The *	(81)* info area provides you	u with an overview of all telephone calls and visits with each person and company over the course of a year.	-
	Comment			
· Syster	m			
	FH_Stalio 10002		PH_SerNo 919	
		2013 - 08:53:38.887	Updated on	
	ated by ID		Updated by ID	
Created	in Module Config	ruration	Updated in Hodule Configuration	
Related				■ ~ ≡
Short	Languag	Language	Text	
	Candond.	Language	Type of activity (visit, phone call, letter, event, fax, e-mail, info).	
-				
	100			
	100	TE_German_LSI TE_English_LSI	Art der Aktivität (Besuch, Telefon, Brief, Veranstaltung, Fax, E-Mail, Info) Type of activity (visit, phone call, letter, event, fax, e-mail, info).	

- 3. You can enter a description of the field in the following fields:
 - **Short Text**: Short description of the contents of the field; this entry should be present for all fields.
 - Long Text: Longer description of the field and its function.
 - Administrator Information : Important information that is not displayed in the field help.

Note: The administrator information is only displayed if the **Display the administrator information in the field help** option is enabled on the **Handling** tab in the user settings, >> Handling Tab.

4. Many fields occur multiple times in the database, e.g. account names or person names. These fields can share the same field help entry. To determine that a field should reference another field's field help, click on a (Select) next to the Reference field and select the desired field.

Note: If a field help entry is reference by another field, changes to the referenced text affect the field help for **all** texts that reference it. The texts are only stored in the database once.

5. Enable the **Do not update** option if you have customized the field help to prevent the entry from being overwritten by future imports.

Note: This option ensures your changes to the field help are not overwritten when importing the field help in future. However, if the standard text for a field has been changed by Aurea CRM, the new text is also not imported.

- 6. You can format the texts using the Markdown syntax, >> http://en.wikipedia.org/wiki/Markdown. Aurea CRM web converts the syntax automatically when displaying texts.
- 7. The default field help contains placeholders, e.g. {PE} for the **Person** info area and {FI/Country} for the **Country** field in the **Company** info area. Use the info area code to reference info areas and the XML name of fields to reference fields. Placeholders are automatically replaced when displaying texts in Aurea CRM web.

Note: You cannot generate a list of the XML names yourself if you are using the SaaS model. In this case, contact your Aurea representative.

System Configuration

The system configuration settings define global settings, e.g. for sending e-mails, debugging etc.

Select Settings () > Maintenance > System Configuration .

System Configuration						
~						
$\left[\right]$	Log	Letter	E-mails	System	Offline	Data Model
				Client d	ebugging 🔲	

Note: Aurea recommends only changing these settings after consulting your Aurea representative.

Application Settings

As administrator, you can determine the appearance of Aurea CRM web and determine which actions are available by default, e.g. in sub-lists.

To configure Aurea CRM web:

- 1. Select Settings () > Maintenance > Application Configuration .
- Switch to the desired tab, >> Layout Tab on page 217, Handling Tab on page 218, Queries Tab on page 220, Analyses Tab on page 222 and CRM.phone Tab on page 223.
- 3. Define the desired settings.
- 4. Save the settings.

Note: Some settings are not applied immediately. You should therefore log out of Aurea CRM web and then log on again.

Layout Tab

Use the Layout tab to configure Aurea CRM web's display.

🌣 Applicati	on Settings				
×					
Layout	Handling	Queries	Analyses	CRM.phone	
Initial letters	s for rep list (em	pty to use 'Rep	Utils_text' Nr 58)	A,B,C,D,E,F,G,H,	I,J,K,L,M,N,O,P,Q,R,S,T,U,V,W,X,
	Max. nun	nber of reps pe	r click in rep tree	30	
	Gle	obal node settin	igs for tree views	Only show the	mber of records for group nodes icon for expanding branches if the y contains records
		D	efault ListParams	includeConditiona	alRights,true
		Default ListPa	rams for Sublists	showCount,50	

- Initial letters for rep list (empty to use 'RepUteils-text' No. 58): Enter the letters that should be displayed as links in the rep list. If you do not have any employees whose name begins with "X", you do not need to include the letter "X" in the list. Separate individual letters by a semicolon (;).
- Max. number of reps per click in rep tree: Determine the maximum number of reps that are displayed within a group in the tree. If more reps are stored in the database than can be displayed, this is indicated by displaying "..." as the last visible entry.
- Global node settings for tree views: The following options are available:
 - **Display the number of records for group nodes:** Determines whether the number of records is displayed per node in brackets.
 - Only show the icon for expanding branches if the branch actually contains records: Enable this option to display an icon next to nodes in the tree if child data is available. Clicking on the icon opens the branch.
- Default ListParams: The default parameters applied to lists.
- Default ListParams for Sublists: The default parameters applied to sub-lists.

Handling Tab

Use the **Handling** tab to configure Aurea CRM web's behavior.

Layout	Handling	Queries	Analyses	CRM.phone	
		Documen	t overwrite mode	Prompt before overwriting documents	~
		1	E-mail icon action	Open e-mail	~
		E-ma	il open separator	Semicolon (Outlook)	~
	Max. rec	ords for search	(0 for unlimited)		
	Μ	lax. number of	exported records	1000	
	Default men	u action when a	record is clicked	A_Expand	
		Default a	ction for sub-lists		
		Proc	ess default action	A_Select	
		Proc	ess default menu	M_Wizard	
		Company-R	elated" option off	AU	
			Favourites	PE,FI,KP,CM	
Info area	as (or "ALL") wi	th disabled Tab	le Caption Cache		
	AutoSearch	default value fo	r linked searches	×	
		Max. number (of history records	10	
Tr	ansfer configur	ation informatio	on to XML exports		
		Er	able link deletion	×	
	Only mat	ch up persons i	in same company		
1	Users can rear	ange tabs and	groups on masks		

- **Document overwrite mode:** Determines the behavior of Aurea CRM web if a user attempts to overwrite an existing document. The following options are available:
 - Never overwrite existing documents (default)
 - Prompt before overwriting documents
 - Always overwrite existing documents
- E-mail icon action: Determines the behavior of Aurea CRM web if a user clicks on the e-mail icon.
 - Open e-mail: Opens the user's e-mail client and enters the e-mail address in the **To:** field.
 - Add activity: E-mails can only be sent once a new activity has been added.
 - Ask user: Allows users to choose whether to add an activity or start their e-mail client.
- E-mail open separator: Define the separator used between multiple e-mail addresses in fields (To, Cc, Bcc) in the e-mail client; e.g. semicolon (;) for Microsoft Outlook and comma (,) for Lotus Notes. The default value is Semicolon (Outlook).

• Max. records for search (0 for unlimited): Determine the maximum number of search results. The default value is 0, which lists all results that meet the defined search criteria.

Use this setting to restrict the number of results. If less hits are returned, all results are listed. If more hits are found, a message is displayed asking users to further restrict their search criteria.

- Max. number of exported records: Define the maximum number of records that are exported. The default value is 1000. Enter -1 for no limit.
- **Default menu action when a record is clicked:** Determine the default action that is carried out when clicking on a record in a list.
- **Default action for sub-lists:** Determine the default action carried out whenever a user double-clicks in a sub-list.
- **Process default action:** Determine the default action carried out whenever a user double-clicks on an entry in a list within a process (wizard). The default value is A_Select.
- **Process default menu:** Determine the default menu displayed for list entries in processes (wizards).
- "Company-related" option off: Specify the info areas where the Company-related check box should not be displayed on the mask.
- Favorites: Specify which info areas' records can be added to a user's favorites.
- Info areas (or "ALL") with disabled Table Caption Cache: Enter the info areas whose table captions should be queried anew directly from the server. Separate entries using a comma. If you enter "ALL", data in all info areas is reloaded. This can impact negatively on the performance of the system.
- AutoSearch default value for linked searches: If this option is enabled, linked searches (e.g. from a linked field) are started automatically.
- Max. number of history records: Define the maximum number of entries in the history.
- **Transfer configuration information to XML exports:** Enable this check box to export additional information in XML files, such as field names and types.
- Enable link deletion: Determines whether users may delete links.
- Only match up persons in same company: Determines whether persons added to the database are only matched up within the same company, or with all persons in the database.

Queries Tab

Use the **Queries** tab to configure the display of queries.

Layout Handling Queries Analyses	CRM.phone
Load query from	Both; CRM.designer first 🗸
Save query to	update.CRM 🗸
Store public queries in	CU_Customer
Show from all parent configurations	
Highlighted info areas	FI,KP,MA
Max. number of records returned by query	1000
Limit for count requests	0
Steps for query records	20,50,100,1000,10000
Default number of records for query execution	100
Query rights	all 🗸
Info areas with generic links	
Info areas to be used in generic links	
Encoding of exported queries (e.g. "Export.Encoding=UTF-1	
Query parameters	 Disable exporting of query results Disable saving of query results

- Load query from: Enter the database (Aurea CRM or CRM.designer) from which queries are loaded.
- Save query to: Enter the database to which queries should be written.
- **Store public queries in:** Enter the configuration used to store global queries and analyses. If you leave this entry empty (default), global queries and analyses are saved to the user's highest level write-enabled configuration.
- Show from all parent configurations: Determines whether queries defined in parent configurations should also be displayed in addition to the queries in the current configuration.
- **Highlighted info areas:** Specify the info areas that are displayed in bold when creating a new query. Separate entries using a comma.
- Max. number of records returned by query: Define the maximum number of records that are returned by a query. The default value is 1000. Enter -1 for no limit.
- Limit for count requests: The count function only counts the number of records returned, rather than carrying out the query. Aurea recommends disabling this function by setting this value to 0, as this function requires system resources.

Use this setting to restrict the number of results. If less hits are returned, the number of hits is displayed. If more hits are returned, a message is displayed. Enter -1 for no limit.

• Steps for query records: Determine steps for the number of records displayed per page. Before executing the query, users can select one of these values from a list.

- **Default number of records for query execution:** Determines the default number of results displayed per page for each step.
- Query Rights: Assign appropriate query access rights:
 - disabled: Users are unable to execute queries.
 - read-only: Users can carry out predefined queries but are unable to define new analyses.
 - read + define: Users can edit existing queries and add new queries. Queries can be saved as private queries.
 - all: Users can also define global queries.
- Info areas with generic links: Determine which info areas can be linked to other areas using generic links. Separate entries using a comma.
- Info areas to be used in generic links: Determine the info areas that can be accessed using generic links from the info areas defined under Info areas with generic links. Separate entries using a comma.
- Encoding of exported queries (e.g. "Export.Encoding=UTF-16"): Determine the character set used to export queries; e.g. UTF-16 or UTF-8.
- Query parameters: The following options are available:
 - **Disable exporting of query results:** Determines whether users may export query results.
 - **Disable saving of query results:** Determines whether users may save query results.

Analyses Tab

Use the **Analyses** tab to configure the display of analyses.

Layout Handling Queries Analyses	CRM.phone
Max. records in analysis	1000
Analysis rights	all 🗸 🗸
Analysis criteria are case-sensitive	
Available categories for date fields in analyses	DateMonthly,DateQuarterly,DateYearly,\$

• Max. records in analysis: Determine the maximum number of records returned by the query used as the basis for an analysis. If less records are returned, they

are displayed. If more records are returned, a message is displayed. The default value is 1000. Enter -1 for no limit.

- Analysis rights: Assign appropriate analysis access rights:
 - disabled: Users are unable to execute analyses.
 - read-only: Users can carry out predefined queries but are unable to define new analyses.
 - read + define: Users can edit existing analyses and add new ones. Analyses can be saved as private analyses.
 - all: Users can also define global analyses.
- Analysis criteria are case-sensitive: Enable this check box to restrict the results of the analysis using upper and lower case.
- Available categories for date fields in analyses: Enter the categories available to users for evaluating data.

CRM.phone Tab

Use the **CRM.phone** tab to influence the behavior of CRM.phone.



- **Incoming call action:** Determine the action that is carried out when an incoming call is received:
 - Do nothing: No action is carried out
 - Popup question: The user is prompted when an incoming call is received.
 - Automatic URL redirect: The URL/process defined in the telephone profile is opened.
- Format of area and country code suggestions for telephone: The format used to display the entire phone number.
- Show CRM.phone panel on phone event: Enable this check box to display the CRM.phone toolbar at the top of the application when Aurea CRM web is started.

CRM.designer Maintenance

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, >> 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.

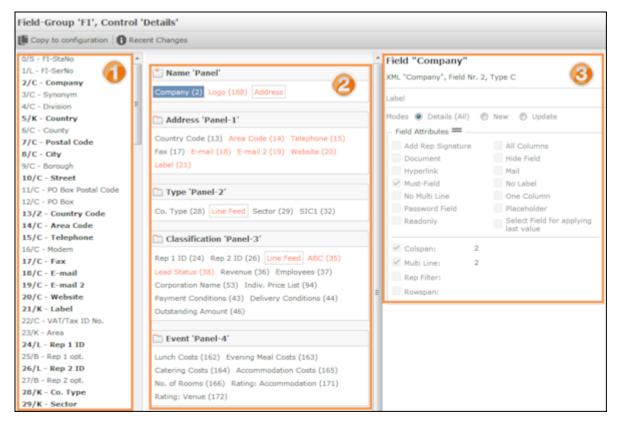
Customizing Configurations in CRM.designer

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. Which functions are available depends on your access rights. A detailed description can be found in the Aurea CRM web Administrator Guide, which 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 (¹¹). 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. Which attributes are available depends on the type of object (panel, field). Which attributes are available 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, >> CRM.designer User Interface on page 226.

- 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, >> 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 \times 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 nonfield elements). Combined fields can be assigned to panels in the same way as normal fields. For more information, >> 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, >> 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 **x** (**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

You can define field attributes for each field, e.g. whether the field is read-only or is a mandatory field. Which field attributes are available for a 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, >> Field Attributes in the Aurea CRM web Administrator Guide.

Defining 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, >> 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, >> 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 v in the Select a text dialog to select the desired text group and text.

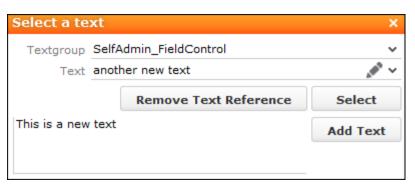


- 3. Click on **Select** to assign the text.
- 4. To remove the text, click on 🖉 (Edit Text) and then on Remove Text Reference.

Adding a New Label Text

To add a new text:

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



 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 **SelfAd-minDev.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 (e.g. 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

The following default keyboard shortcuts are available in Aurea CRM web. Your administrator can define additional shortcuts or reassign the following standard shortcuts.

Global Keyboard Shortcuts

Shortcut	Description	
F1	Opens the online help.	
Alt+Q	Moves to the next text field in the quick search.	

Search Area and Results Lists in Edit Mode

Shortcut	Description	
Tab	Moves to the next editable field or the next action.	
Shift+Tab	Moves to the previous editable field or previous action.	
Alt+0	Activates the Related Data area.	
Alt+ <num- ber></num- 	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.

	Switches to the same field in the next row. Changes to the cur- rent 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+ <num- ber></num- 	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 calen- dar.
Del	Deletes the selected entry.

Resource View / Visit Planning in Edit Mode

Shortcut	Description
Del	Deletes the selected entry.

2

Customer Data – LSI

Learn to view and process customer data as per your requirement.

A company's most valuable asset is comprehensive information on customers and interested parties that is available quickly. This information forms the basis for providing customer care.

You can enter all information relevant to accounts and persons (names, addresses, telephone numbers) in the customer base.

Data added and edited by field reps can be verified and approved by office staff.

You can use all data stored in the customer base as criteria for sending letters, event invitations, promotional material and newsletters.

You can store additional addresses for each customer (e.g. delivery of billing addresses) as well as all contact information (e.g. telephone numbers and e-mail addresses). You can upload documents (e.g. special agreements) and images to accounts and persons.

You can display a company's location in Bing Maps based on the address information entered in the system. For further details, see Map View.

Accounts, Persons and Roles

Learn about accounts, persons in the accounts and roles assigned to the persons.

You can store both accounts and persons in Aurea CRM web.

- Persons can be active in various roles at different accounts, e.g. a doctor may work at several clinics or have both a private practice and work at a shared practice.
- Any number of persons can occupy various roles at an account, e.g. as an employee and/or manager.
- When adding an account, enter data such as the account's name and address.
- When adding a person, enter their personal details and private contact data (e.g. their date of birth, private e-mail address).
- When adding a role at an account, enter the person's contact data at the company (e.g. their corporate e-mail address and telephone extension).
- Select (Master Data) > Accounts to search for persons.

Open a record (e.g. by double-clicking in the results list) and switch to the **Persons** node in the tree to display all persons with a role at the account.

• Select (Master Data) > Persons to search for persons.

Open a record (e.g. by double-clicking in the results list) and switch to the **Roles** node in the tree to display all the person's roles at all accounts.

• Select **Open related Account** or **Open Related Person** from the context menu to open the associated account or person record.

Example: Tree view of an account

When accessing an account (or person), data is displayed in the tree view by default:

Ran Klinik		ph osite mail	Accou Hoss Accou Activ Key A 🗸		
Ran Klinik - Persons (2) - Activities (>5) - Activities (>5) - Account Manager (3) - Relationships (4) - Key Account Management - Account Plans (2) - Detail Plans (2) - Karketing objectives (3) - Marketing objectives (3) - Orders (>5) - KPI (0) - Contact Times (0) - Call Expense (1) - POS Material (>5)	 Ran Klinik Ran Klinik Account Ran Klinik Account Hospital Key Acc ✓ Sunshin Address Classification Address Ranstraße 8-12 1010 Wien Austria 	Account Activ Synonym Additional Info Telephone Fax E-mail Website	ve	Show in Bing Maps Geo-coordinates Brick No. Brick MicroBri 12345 MicroBrick	Admin
 Additional Addresses (0) Requests for Change Bulletin Board (0) Documents (2) Tasks (0) 	Related Data Map × Activities × Per «« « 1 - 15 of 23 > »» Acco Pers Ran Kl Ran Kl Ran Kl	Start Type 11.08 Visit 25.06 Visit	Start End t 12:37 13:0 t 09:43 10:1 t 00:00 00:3	+ New Subj Rep 77 <u>Adam</u> 13 <u>Vera</u>	D OD I ■ I ≡ Status Sched Sched Sched

This 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: Child info areas are displayed in the tree. The number of child records of each type is displayed in brackets.
- Details mask: This area displays the data in the selected record. The header contains the context menu and buttons that allow you to edit the data. Move your mouse cursor over a button to display a tooltip containing the button's function.

Adding Accounts and Assigning Persons

To add a new account:

- 1. Select (Master data) > New Account. The input mask is displayed.
- 2. Enter the data.
- 3. Save the record.
- 4. You are asked whether you want to assign a person to the account.
- 5. Click on one of the following:
 - No: The account is displayed.
 - Yes: Select an existing person or add a new one and then specify the person's role at the account. Enter additional information on the person in the context of the account, e.g. their business e-mail address.
- 6. Save the record.
- 7. You can assign additional persons to the account.

Adding Persons and Assigning Persons to Accounts

To add a new person:

- 1. Select (Master Data) > New Person.
- 2. Enter the person's data.
- 3. Save the record.
- 4. You are asked whether you want to assign the person to an account.
- 5. Click on one of the following:
 - No: The person is displayed
 - Yes: Select an existing account or add a new one and then specify the person's role at the account. Enter additional information on the person in the context of the account, e.g. their business e-mail address.
- 6. Save the record.
- **7.** You can assign additional the person to the additional accounts.

Adding a Person's Roles

To store a person's role at an account:

- 1. Switch to the desired person.
- 2. Click on the Roles node in the tree.
- **3.** Click on \oplus (**New**) in the results list.
- 4. Select the desired account or add a new one.
- 5. Enter person's role (Function field) at the account, e.g. "Manager".

- 6. Enter additional information on the person in the context of the account, e.g. their business e-mail address.
- 7. Save the record.
- 8. You can assign the person to additional accounts.

Assigning Persons to an Account

To assign a person to an account:

- 1. Switch to the desired account.
- 2. Click on the **Persons** node in the tree.
- **3.** Click on \oplus (**New**) in the results list.
- 4. Search for the desired person or add a new person.
- 5. Enter person's role (Function field) at the account, e.g. "Manager".
- 6. Enter additional information on the person in the context of the account, e.g. their business e-mail address.
- 7. Save the record.
- 8. You can assign additional persons to the account.

Adding Accounts and Assigning Persons

To add a new account:

- 1. Select (Master data) > New Account. The input mask is displayed.
- 2. Enter the data.
- 3. Save the record.
- 4. You are asked whether you want to assign a person to the account.
- 5. Click on one of the following:
 - No: The account is displayed.
 - Yes: Select an existing person or add a new one and then specify the person's role at the account. Enter additional information on the person in the context of the account, e.g. their business e-mail address.
- 6. Save the record.
- 7. You can assign additional persons to the account.

Adding Persons and Assigning Persons to Accounts

To add a new person:

- 1. Select (Master Data) > New Person.
- 2. Enter the person's data.
- 3. Save the record.
- 4. You are asked whether you want to assign the person to an account.
- 5. Click on one of the following:
 - No: The person is displayed
 - Yes: Select an existing account or add a new one and then specify the person's role at the account. Enter additional information on the person in the context of the account, e.g. their business e-mail address.
- 6. Save the record.
- **7.** You can assign additional the person to the additional accounts.

Adding a Person's Roles

To store a person's role at an account:

- 1. Switch to the desired person.
- 2. Click on the Roles node in the tree.
- 3. Click on \oplus (**New**) in the results list.
- 4. Select the desired account or add a new one.
- 5. Enter person's role (Function field) at the account, e.g. "Manager".
- 6. Enter additional information on the person in the context of the account, e.g. their business e-mail address.
- 7. Save the record.
- 8. You can assign the person to additional accounts.

Assigning Persons to an Account

To assign a person to an account:

- 1. Switch to the desired account.
- 2. Click on the Persons node in the tree.
- 3. Click on \oplus (New) in the results list.

- 4. Search for the desired person or add a new person.
- 5. Enter person's role (Function field) at the account, e.g. "Manager".
- 6. Enter additional information on the person in the context of the account, e.g. their business e-mail address.
- 7. Save the record.
- 8. You can assign additional persons to the account.

Organizational Chart

You can display an accounts organizational structure in an organigram.

To display the organigram for an account:

- 1. Switch to the desired account.
- 2. Click on & (Organigram). The organizational chart is displayed.

	Bem Hospital	
	Specialty: Surgery ABC: - Postal Code: 1010 City: Wien Telephone: - Actual visits/period: 0 Last visit: -	
	Person: 2	•
Bem Pharmacy East		Bem Pharmacy
Specialty: - ABC: - Postal Code: 1010 City: Wien Telephone: - Actual visits/period: 0 Last visit: -		Specialty: - ABC: - Postal Code: 1010 City: Wien Telephone: - Actual visits/period: 0 Last visit: -

The organigram displays the most account's important data such as the specialty, address, date of the last visit etc.

3. Click on + to display the persons stored for the account. Click on - to hide the persons again.

Click on \oplus at the top left of the organigram to display all persons for all accounts; click on \bigcirc to hide all contact persons.

4. Click on 🖶 (**Print**) to print the organizational chart.

Fact Sheet

The fact sheet contains an overview of the information stored for an account and is suitable for printing.

To display the fact sheet:

- 1. Switch to the desired account.
- 2. Click on 🗟 (Fact Sheet) in the header. The fact sheet is generated.

Note: Your browser's popup blocker may prevent the fact sheet from being displayed.

In order for the fact sheet to contain data, at least one person and at least one activity must be present.

The fact sheet includes information on scheduled and open activities and the last five completed activities, for example.

Click on 🖶 to print the fact sheet.

Additional Addresses

Learn how to store additional address.

You can store additional addresses for an account. A large clinic may have several departments, for example. Each department may be located in a separate building and have its address. You can also define the address of another account as an additional address, e.g. as the billing or delivery address.

To add an additional address:

- 1. Switch to the desired account.
- 2. Click on the Additional Addresses node in the tree.
- **3.** Click on \oplus (**New**) in the results list.
- 4. You can click on Q (Select) to the right of the Target Account field and select an account to use that account's address as an additional address for the current account. The address data entered for the selected account is transferred automatically.
- 5. Select the Address type (e.g. delivery or billing address).

Note: You can only add one additional address per account and **Address type**.

6. Save the record.

Contact Times

Learn to add contact times.

You can enter contact times for account and persons, e.g. a doctor's consultation hours or the opening hours of a pharmacy. These times are color-coded in the calendar to aid you in planning appointments whenever you add an activity for the customer 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 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. In Aurea CRM web, such holidays are taken into account when planning visits.

To enter contact times for an account or person:

- 1. Switch to the desired record.
- 2. Click on the Contact Times node in the tree.
- 3. Click on \oplus (New) in the results list.
- 4. Select the **Type** and **Weekday** and enter the contact times in the appropriate fields.
- 5. Save the record.

Characteristics

Learn to store special characteristics.

You can store special characteristics for accounts and persons, e.g. information on the number of employees or the location of accounts, or hobbies, memberships, etc. for persons. This information can be used in marketing campaigns. it may also useful when meeting business partners, in order to strike up a conversation.

Characteristics are defined by your administrator.

To assign characteristics:

- 1. Switch to the desired record (account/person).
- 2. Click on the Characteristics node in the tree.

3. Click on \oplus (**New**) in the results list. A dialog opens.

David Riedel			□ × □
Characteristics for	David Riedel		Completed
Hobbies			
Cooking	Culture	Kanzashi	🖌 Tennis

- 4. Enable the corresponding check boxes to assign characteristics to the account or person.
- 5. Click on 🕒 (Completed).

Defining Characteristics

Characteristics need to be defined before characteristics can be assigned to accounts/persons.

Note: You can define characteristics if you have the necessary access rights.

A characteristic is defined using the following criteria:

Defining Characteristic Groups

To define a characteristic group:

1. Select (Settings) > Maintenance > Characteristic Definitions.

- 2. Click on \oplus (New) in the results list.
- **3.** Enter the data. Select whether the characteristic applies to accounts or persons from the **Dependence** field.
- 4. Enable the Lock option to determine that the characteristics group is not available for selection by users. Enable the Single Selection check box to determine that only one entry in the group may be selected.

Note: The **Brand**, **Percentage** and **Classification axis** have no function in Aurea CRM web; these are used to classify projects in CRM.pad.

5. Save the record.

Adding Characteristics to Characteristic Groups

To define a characteristic:

- 1. Select (Settings) > Maintenance > Characteristic Definitions.
- 2. Click on the desired characteristic group in the results list. The **Related Data** area is displayed below the list.
- **3.** Switch to the **Characteristic Definition** tab and click on \oplus (**New**).
- 4. Select the **Characteristic group** and **Characteristic**. Enable the **Lock** option to determine that the characteristic is **not** available for selection by users.
- 5. Enter a number in the **Sort** field to determine the position within the group the characteristic is displayed at.

Note: You can assign points to characteristics in order to define the importance of a characteristic. The importance is used by CRM.pad.

- 6. If a large number of characteristics have been defined, so that not all characteristics in a group can be displayed (e.g. a maximum of five characteristics may be displayed in your configuration), the system indicates that more entries are available (e.g. ">>5") in the default configuration. Enable the Interactive Administration check box to display the actual number of characteristics (instead of ">>5").
- 7. Save the record.

Defining Restrictions for Characteristic Groups

You can define restrictions that determine which characteristics are available for which accounts or persons.

To define a restriction:

- 1. Select (Settings) > Maintenance > Characteristic Definitions.
- 2. Click on the desired characteristic group in the results list. The **Related Data** area is displayed below the list.
- **3.** Switch to the **Characteristic Restriction** tab and click on \oplus (**New**).
- 4. Select the Account type, Person type and/or Specialty. Characteristics are only available for selection if all restrictions apply to the account/person.
- 5. Save the record.

Defining Characteristics

Characteristics need to be defined before characteristics can be assigned to accounts/persons.

Note: You can define characteristics if you have the necessary access rights.

A characteristic is defined using the following criteria:

- Characteristic group, >> Defining Characteristic Groups on page 246.
- Characteristics, >> Adding Characteristics to Characteristic Groups on page 246.
- Restrictions, >> Defining Restrictions for Characteristic Groups on page 247.

Individual characteristics are grouped together in characteristic groups (e.g. one group for "hobbies" which includes the "sport", "travel" and "culture" characteristics). Restrictions can be defined, e.g. to determine that a characteristic group only applies to persons whose person type is "doctor".

Defining Characteristic Groups

To define a characteristic group:

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- 2. Click on \oplus (New) in the results list.
- **3.** Enter the data. Select whether the characteristic applies to accounts or persons from the **Dependence** field.
- 4. Enable the Lock option to determine that the characteristics group is not available for selection by users. Enable the Single Selection check box to determine that only one entry in the group may be selected.

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- 3. Switch to the **Characteristic Restriction** tab and click on \oplus (New).
- 4. Select the Account type, Person type and/or Specialty.

Characteristics are only available for selection if all restrictions apply to the account/person.

5. Save the record.

Relationship Management

Relationships are used to depict hierarchies and networks between accounts and persons.

You can depict relationships between doctors and hospitals/practices, for example. Listings are also inherited based on relationships.

Depending on your configuration, you can depict relationships in the relationship chart and/or relationship network.

The relationship network displays all that an account or person's relationships with other companies and persons, see **Relationship Network** on page 254.

The relationship chart displays all that an account's relationships with other accounts and persons, see Relationship Chart.

Switch to the **Relationships** node in the tree view of a person or account, and switch to either the **Relationship Chart** or **Relationship Network** tab in the main area.

Adding Relationships

To add a new relationship:

1. Switch to the desired record. Click on the **Relationships** node in the tree.

The results list is displayed. The header of the results list contains buttons that you can use to restrict the results to a particular type of relationship (e.g. **General relationships** or **Personal relationships**).

- 2. Click on \oplus (New) in the results list.
- 3. Choose whether you want to add a relationship with a company (account) or a person.
- 4. Select the desired record from the search results to add a relationship with that account/person.

Relationship Levels General relationships Personal relationships Company structure Associations Fugh level Low level No Filter						
Supplier & retailer	has channel of distribution	1	Supplier & retailer	is channel of distribution of	2	
Supplier & retailer	has wholesaler	2	Supplier & retailer	is a wholesaler of	1	
Supplier & retailer	is a customer of	2	Supplier & retailer	is a supplier of	1	
Supplier & retailer	is a supplier of	1	Supplier & retailer	is a customer of	2	
Supplier & retailer	is a wholesaler of	1	Supplier & retailer	has wholesaler	2	
Supplier & retailer	is channel of distribution of	2	Supplier & retailer	has channel of distribution	1	

5. Double-click on the desired relationship. The relationship is added and a reciprocal relationship is added in the background automatically.

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 \oplus (**New**).

- 3. Define the **Relationship category**, **Relationship** and **Business Area** for both the relationship and the reciprocal relationship, and enter the appropriate **Level**.
- 4. Save the record.

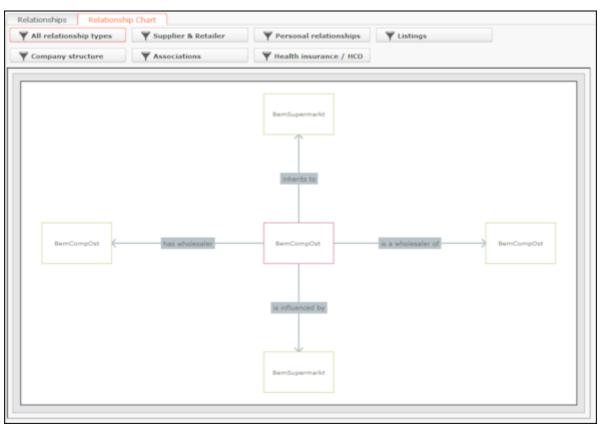
The defined relationship can then be selected when adding relationships.

Relationship Chart

The relationship hierarchy provides a graphical overview of all accounts and persons that are directly or indirectly linked to other companies or persons.

To display the relationship hierarchy:

- 1. Switch to the desired account/person.
- 2. Click on Relationships in the tree.
- 3. Click on the Relationship Chart tab.
- Determine which relationships to display in the chart. You can restrict the chart to certain types of relationships (e.g. Supplier & Retailer).

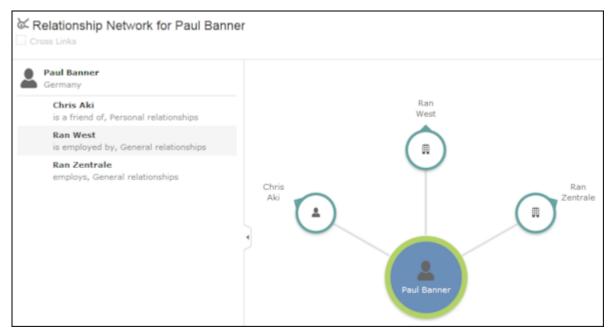


5. Click on a person or account in the chart to open the person or account record.

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. Each level represents a degree of separation from the current record (i.e. the first level corresponds to those companies/persons directly linked to the current record, the second level corresponds to those companies/persons linked to the companies/persons in the first level etc.).



- 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

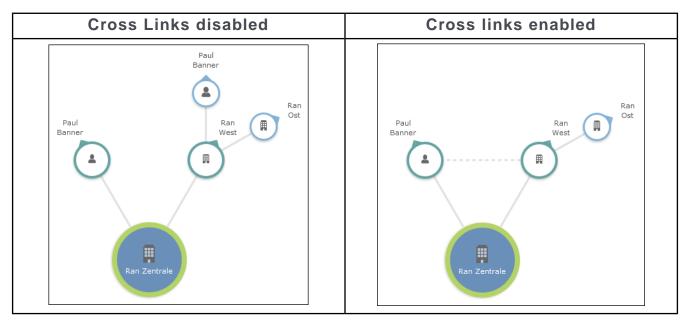
company's name to display the company or person in the quick view. Click on boost to close the side bar.

- Click on a node to select it. The list of relationships in the sidebar is updated.
- 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).
- 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 the scroll the view and reposition nodes in the network:
 - Click anywhere in the network where the rouse cursor is displayed to scroll in the network.
 - Click on a node and then click on it again while holding down the mouse button 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 ondes 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).

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.

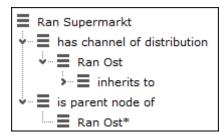


Relationship Tree

The relationship tree provides a graphical overview of all companies that are directly or indirectly linked to other companies using relationships.

To display the relationship tree:

- 1. Switch to the desired company.
- 2. Click on the Relationships node in the tree.
- 3. Switch to the **Relationship Tree** tab in the main area.



The company you access the relationship hierarchy from is displayed in bold.

Adding Relationships

To add a new relationship:

1. Switch to the desired record. Click on the **Relationships** node in the tree.

The results list is displayed. The header of the results list contains buttons that you can use to restrict the results to a particular type of relationship (e.g. **General relationships**).

- 2. Click on \oplus (**New**) in the results list.
- 3. Choose whether you want to add a relationship with a company (account) or a person.
- 4. Select the desired record from the search results to add a relationship with that account/person.

Relationships General relationships General relationships Personal relationships Company structure Associations Supplier & retailer High level No Filter							
Select a record							
Relationship categ	Relationship	Level	Relationship category	Relationship reciprocal	Reciprocal Rel		
Supplier & retailer	has channel of distribution	1	Supplier & retailer	is channel of distribution of	2		
Supplier & retailer	has wholesaler	2	Supplier & retailer	is a wholesaler of	1		
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Supplier & retailer	is a supplier of	1	Supplier & retailer	is a customer of	2		
Supplier & retailer	is a wholesaler of	1	Supplier & retailer	has wholesaler	2		
Supplier & retailer	is channel of distribution of	2	Supplier & retailer	has channel of distribution	1		

5. Double-click on the desired relationship. The relationship is added and a reciprocal relationship is added in the background automatically.

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 \oplus (New).
- 3. Define the **Relationship category**, **Relationship** and **Business Area** for both the relationship and the reciprocal relationship, and enter the appropriate **Level**.
- 4. Save the record.

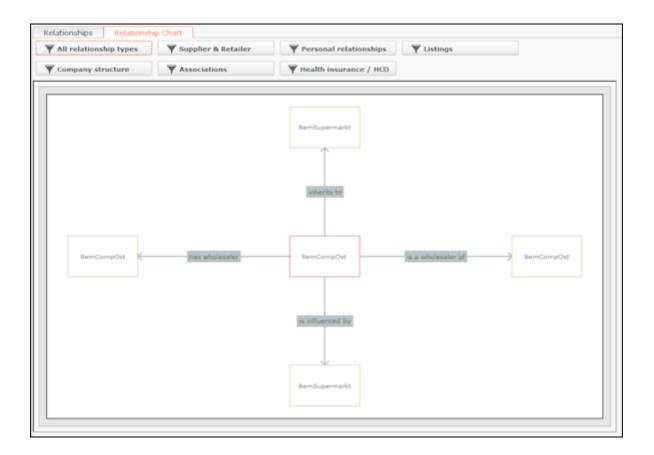
The defined relationship can then be selected when adding relationships.

Relationship Chart

The relationship hierarchy provides a graphical overview of all accounts and persons that are directly or indirectly linked to other companies or persons.

To display the relationship hierarchy:

- 1. Switch to the desired account/person.
- 2. Click on Relationships in the tree.
- 3. Click on the Relationship Chart tab.
- 4. Determine which relationships to display in the chart. You can restrict the chart to certain types of relationships (e.g. **Supplier & Retailer**).

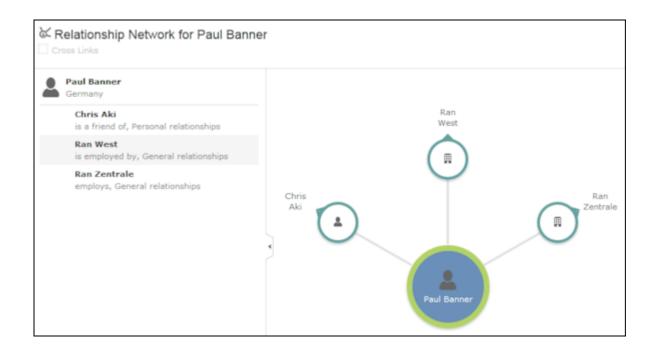


5. Click on a person or account in the chart to open the person or account record.

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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. Each level represents a degree of separation from the current record (i.e. the first level corresponds to those companies/persons directly linked to the current record, the second level corresponds to those companies/persons linked to the companies/persons in the first level etc.).



- 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 to select it. The list of relationships in the sidebar is updated.
- 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).
- 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.

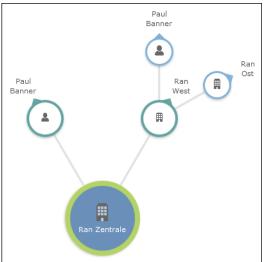
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 - Click on a node and then click on it again while holding down the mouse button to move the node. Any child nodes are also moved.
- If the current record has relationships with more than 10 records (by default), the

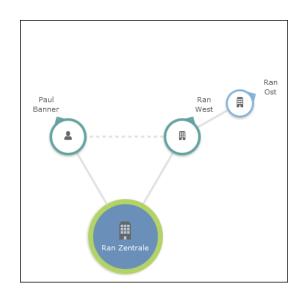
• and • nodes are displayed. Click on these nodes to display additional records that relationships have been defined with.

• 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).

Example: If a relationship is defined between a person and two companies, and a relationship has also been defined between these two companies, the person is displayed twice, once for the relationship with each company. If the **Cross Links** option is enabled, the person is only displayed once and a dotted line links the second company to the person.







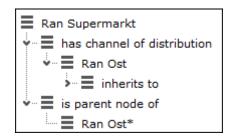
Cross links enabled

Relationship Tree

The relationship tree provides a graphical overview of all companies that are directly or indirectly linked to other companies using relationships.

To display the relationship tree:

- 1. Switch to the desired company.
- 2. Click on the Relationships node in the tree.
- 3. Switch to the Relationship Tree tab in the main area.



The company you access the relationship hierarchy from is displayed in bold.

- 4. Click on an entry to display additional information below the hierarchy and to edit it if desired.
- 5. Click on ≡ (Show Menu) next to an entry in the hierarchy and select Tab View from the context menu to edit an entry.

Cyclical Relationships

If cyclical relationships exists (A is partner of B, B is partner of C, C is partner of A), the company/person needs to be displayed multiple times: If a company needs to be displayed more than once, one is defined as the **main instance** and the other as duplicates. Duplicates are indicated with a *.

No further relationships are displayed for duplicates. All relationships are displayed for the main record, except for with the company/person directly above the main record in the tree. This includes relationships with companies/persons that are in turn linked to duplicates. This allows you to display all relationships for this company/person at a single point in the tree.

Portfolios

Portfolios allow you to classify your customers by answering a series of questions.

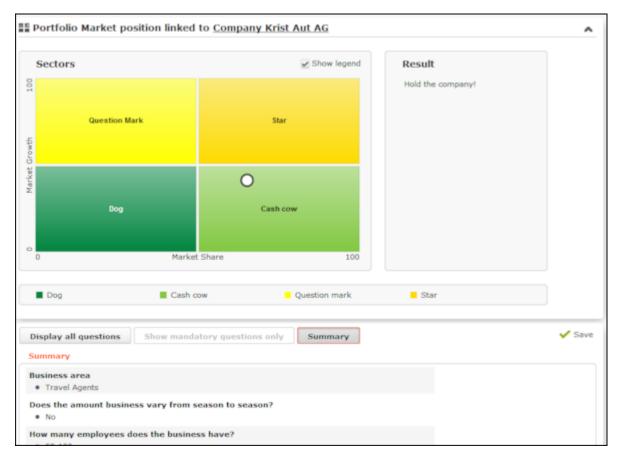
Customer classifications help you define your customer support strategy.

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 account.
- 2. Switch to the **Portfolio** tab and click on \oplus (New).
- 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.

5. Click Save.

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 \oplus (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. Save the record.

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. Click on \oplus (New) in the search results' header.
- 3. Select the type of portfolio you want to add.
- 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 portfolio 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.
- Enter an Info are code and Field Number to determine that the classification is written to the selected field.

Note: The result of the portfolio is the text entered in the **Classification** field of portfolio sector description. Whether the entire classification or only a portion thereof is written to 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 \oplus (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 the text to be displayed in the portfolio's legend in the Name field and the text displayed in the sector in the Classification field. 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, see Defining Questions on page 329 and Defining Answers on page 331.

12.Save the record.

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.

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- 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. Save the record.

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To define a portfolio:

- 1. Select (Settings) > Maintenance > Portfolio.
- **2.** Click on \oplus (**New**) in the search results' header.
- 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 portfolio 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.
- Enter an Info are code and Field Number to determine that the classification is written to the selected field.

Note: The result of the portfolio is the text entered in the **Classification** field of portfolio sector description. Whether the entire classification or only a portion thereof is written to the target field depends on the length of the target field.

9. Save the record.

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- 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 the text to be displayed in the portfolio's legend in the Name field and the text displayed in the sector in the Classification field. Enter a text in the Result field that is displayed of 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 329 and Defining Answers on page 331.

12.Save the record.

Key Performance Indicators (KPI)

Key Performance Indicators (KPIs) can be used to monitor your progress towards your objectives, e.g. compare the scheduled visits per account to the actual visits over a particular time period (quarter, year).

When calculating the KPIs, the account hierarchy is taken into account to prevent data from being counted multiple times. For example - if a field rep visits several persons in a department or several departments of an account, such a visit is only counted once at the department and account level respectively.

Aurea CRM differentiates between the following types of KPIs:

- Account-related KPIs, used to evaluate data such as specialties, brands, target visits and ABC classification per quarter and per year.
- Person-related KPIs, used in addition to account-related KPIs allow you to evaluate the contact person's role, level, specialty, prescription potential, loyalty and product opinions.

All KPIs defined for an account and persons linked to the account are displayed in the **KPI** node (**Account-related** and **Person-related** tabs).

Person-related KPIs are also displayed in the person tree (**Roles** node, select the account to view the KPIs on the **KPI** tab) as well as in the account tree (**Persons** node, select the desired person to view the KPIs on the **KPI** tab).

The number of activities of the **Type** "Visit" with the **Status** "Completed" is automatically entered in the **Actual visits/period** field of the KPI record.

The start page for sales reps includes an overview of KPIs including the actual and target number of visits for the current period.

Note: Visits added for persons linked to an account are displayed for both the person and the account and are counted as a completed visit for both.

Adding KPIs for Accounts and Persons

Note: You can only add KPIs if you have the necessary access rights.

To add a KPI:

- 1. Switch to the desired account/person.
- Click on the KPI node in the tree for accounts or open the Roles tab for persons, select the desired account and switch to the KPI tab.
- **3.** Click on \oplus (**New**) in the results list.
- 4. Enter data such as the Year, the Period, the Business area, the Specialty, Brand etc.

- 5. You can enter further details in the **Customer Classification** area, such as the **Potential** (current and target), the **Intimacy** (actual and target values) etc.
- 6. Save the record.

Adding Global KPIs

Note: You can only add global KPIs if you have the necessary access rights.

To add a global KPI:

- 1. Select **W** (Sales) > KPI (Global).
- 2. Click on \oplus (New) in the results list.
- 3. Enter data such as the Country, Year, Period, Target visits/year, Actual visits/year etc.
- 4. Enter the **KPI type** and **Account type** and/or the **Specialty**. The KPI type determines whether KPI records are generated for accounts or persons.
- 5. Save the record.
- 6. Click on Fill Targets. A To-Do is added that is used to generate the KPI records automatically.

Note: KPI records are only added automatically if an account manager has been entered for matching persons or accounts, see **Territory Management – LSI** on page 494.

Note: To change the target number of visits in the generated KPI records, edit the global KPI record and click on **Fill Targets** again.

Note: Depending on the configuration defined by your administrator, the values may be transferred to customer records at a later time, e.g. during the night to reduce the impact on the system's performance.

KPI Report

The KPI report for field reps display an overview of how customer calls are distributed in comparison to the target numbers defined in the KPIs.

Depending on your business area, calls are either broken down by account type (OTC) or the specialty of persons (Rx).

Note: You can only generate KPI reports if you have the necessary access rights.

Select

(**Reporting**) > **KPI Report** to generate the report.

Select 🖨 (Print) to print the report.

Example (OTC):

Г

ы ке	porcio	or Sally Sales (
1	1	Workdays	Administration	Others	Visit	Conference	Sick leav	e M	leeting/Educa	tion	Holiday
stal		10		0,00 1,00	8,00	1,00	0,0	00		0,00	1,
2	Visits	Product Detailing	Medical Insuing	Tandem activity	10	isits / Workday	3				0,
0-	0	0	0	0		Sits / Horksey	9				
A	8	0	0	0				Visit spr	ead		
в	0	0	0	0							
c	1	0	0	0				-			
D	0	0	0	0		А	, 88% ~				
]E	0	0	0	0				1			
Total	9	0	0	0						E,0% D,0% -,0% C,11%	
	– Targete	d accounts							в,		
		d accounts	No. of v	isits			0	1-4	5-7	8-12	13+
4		Actual	Target	ėsits Ratio	Tar	geted accounts			5-7	8-12	
4		Actual	Target 0 0	Ratio		geted accounts	0 0	0	5-7	8-12	
4		Actual	Target 0 0 8 25	Ratio 32%		geted accounts	0 0 3 1	0	5-7 0 1	8-12 0 0	
4)	Actual	Target 0 0	Ratio		geted accounts	0 0 3 1 2 1	0	5-7	8-12	
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	tal Hoseital Hoseita	Actual	Target 0 0 0 0 8 25 17 3 8 0 0 0 0 1 5 5	Ratio 32% 29% 38% 20%	6	geted accounts	0 0 3 11 2 11 1 0 1 0 1 0 0 0 1 0	0 1 0 1 1 1 1 1 1 1 1	5-7 0 1 1 5 0 0 0 0 0 0	8-12 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	

1	Displays the work you have entered and your work days for the current year up to the current date. This data is taken from the entries in the occupation report, see Occupation Reporting – LSI on page 455.
2	Displays the number of completed visits broken down by the classification defined in the KPI. This table only displays visits during the current period (the Period defined in the KPI record).
3	Displays a pie chart breaking down the visits over the current period by classification. The number at the top right indicates the average number of visits per work day.
4	Displays details on visits completed during the current period. Click on - (unclassified), A , B , C etc. to view additional details. The Target column displays the target visits entered in the KPI records for the period. The Ratio column displays the percent- age of the target that has been reached (Actual / Target). The 0 , 1-4 , 5-7 etc. columns display the number of companies visited that often. Visits are then broken down by account type (OTC) or specialty (Rc). The figure displayed in this column for a company/person indicates the actual number of visits for that person. The Total row at the bottom of the table displays the sum totals.

The following requirements must be met to display the KPI report correctly:

- You must be assigned to a **Business area**, see Managing Reps on page 208.
- You need to be entered as the account manager of companies/persons, see Territory Management – LSI on page 494.
- KPI records containing a suitable **Classification** must have been added for companies/persons, see Key Performance Indicators (KPI) on page 262.
- Your Business area must be the same as that entered in activities and the KPI record.
- You need to have entered your activities and occupations (using the occupation reporting function or in the calendar). Activities added to the calendar need to first be transferred to the occupation report, see Occupation Reporting – LSI on page 455 and Phase 2 - Edit on page 461.

Adding KPIs for Accounts and Persons

Note: You can only add KPIs if you have the necessary access rights.

To add a KPI:

- 1. Switch to the desired account/person.
- Click on the KPI node in the tree for accounts or open the Roles tab for persons, select the desired account and switch to the KPI tab.
- **3.** Click on \oplus (**New**) in the results list.
- Enter data such as the Year, the Period, the Business area, the Specialty, Brand etc.
- 5. You can enter further details in the **Customer Classification** area, such as the **Potential** (current and target), the **Intimacy** (actual and target values) etc.
- 6. Save the record.

Adding Global KPIs

Note: You can only add global KPIs if you have the necessary access rights.

To add a global KPI:

- 1. Select **I** (Sales) > KPI (Global).
- 2. Click on \oplus (New) in the results list.
- 3. Enter data such as the Country, Year, Period, Target visits/year, Actual visits/year etc.
- 4. Enter the **KPI type** and **Account type** and/or the **Specialty**. The KPI type determines whether KPI records are generated for accounts or persons.

- 5. Save the record.
- 6. Click on Fill Targets. A To-Do is added that is used to generate the KPI records automatically.

Note: KPI records are only added automatically if an account manager has been entered for matching persons or accounts, >> Territory Management – LSI on page 494.

Note: To change the target number of visits in the generated KPI records, edit the global KPI record and click on **Fill Targets** again.

Note: Depending on the configuration defined by your administrator, the values may be transferred to customer records at a later time, e.g. during the night to reduce the impact on the system's performance.

KPI Report

The KPI report for field reps display an overview of how customer calls are distributed in comparison to the target numbers defined in the KPIs.

Depending on your business area, calls are either broken down by account type (OTC) or the specialty of persons (Rx).

Note: You can only generate KPI reports if you have the necessary access rights.

Select (**Reporting**) > **KPI Report** to generate the report.

Select 🖨 (**Print**) to print the report.

Example (OTC):

PI Re											
1	1	Workdays	Administration	Others	Visit	Conference	Sick lea	ve P	Meeting/Educa	ation	Holiday
tal		10		0,00 1,00	8,00	1,00	0	.00		0,00) 1,
2	Visits	Product Detailing	Medical Inquiry	Tandem activity	Vi	sits / Workday	3)			0
0-	0	0	0	0							
A	8	0	0	0				Visit sp	read		
в	0	0	0	0							
с	1	0	0	0				-	-		
D	0	0	0	0		A	, 88% ~				
[E	0	0	0	0				1			
Total	9	0	0	0						E,0% D,0%	
	— Targete	ed accounts									
		d accounts	No. of y	isits			0	1-4	5-7	8-12	13+
4		d accounts	No. of y Target	ėsits Ratio	Tar	geted accounts	0	1-4	5-7	8-12	13+
4		Actual	Target 0 0		Tar	geted accounts	0 0		5-7		0
4		Actual	Target 0 0 8 25	Ratio 329		geted accounts	0 0	0	0	(0
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1	Displays the work you have entered and your work days for the current year up to the current date. This data is taken from the entries in the occupation report, >> Occupation Reporting – LSI on page 455.
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3	Displays a pie chart breaking down the visits over the current period by classification. The number at the top right indicates the average number of visits per work day.
	Displays details on visits completed during the current period. Click on - (unclassified), A , B , C etc. to view additional details.
	The Target column displays the target visits entered in the KPI records for the period. The Ratio column displays the percent-age of the target that has been reached (Actual / Target).
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Note: The following requirements must be met to display the KPI report correctly:

- You must be assigned to a **Business area**, >> Managing Reps on page 208.
- You need to be entered as the account manager of companies/persons, >> Territory Management LSI on page 494.
- KPI records containing a suitable **Classification** must have been added for companies/persons, >> Key Performance Indicators (KPI) on page 262.
- Your **Business area** must be the same as that entered in activities and the KPI record.
- You need to have entered your activities and occupations (using the occupation reporting function or in the calendar). Activities added to the calendar need to first be transferred to the occupation report, >> Occupation Reporting – LSI on page 455 and Phase 2 - Edit on page 461.

Merging Accounts and Persons

Duplicate account 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 from which the merge process is started is referred to as the source record below. The record it is being merged with is referred to as the target records. The source record is removed from the database. The target record is saved and contains the merged data.

To merge accounts or persons:

 Select Merge with from the account 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.

Note: You need the necessary access rights to access this function.

The process used to merge the records is started and the account/person search is displayed.

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: Ran Supermarkt Jarget: Ran Super	Prepare	Resolve 0%	Run		,	
Overview of records to be merged						
Source Record (will be deleted)		Target Record (will be a	cept)			
Company name Ran Supermarkt		Company name	Ran Super			
Synonym		Synonym				
Company type Supermarket		Company type	Supermarket			
Telephone		Telephone				
E-mail		E-mail				
Website		Website				
Postal Code 1050		Postal Code	1040			
City Wien		City	Wien			
Street		Street				
Country Austria		Country	Austria			
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 [account/person]** column.

Field	Source Ran Supermarkt	Target Ran Super
Company name	✓ Ran Supermarkt 24.04.2014 12:46	Ran Super 16.05.2014 09:40
Postal Code	✓ 1050 19.05.2014 13:03	1040 19.05.2014 13:04
Postcode ID	✓ 1 06.06.2014 15:53	6 26.05.2014 10:12
Account no.	✓ 1-82517 24.04.2014 12:46	1-82527 16.05.2014 09:40
Next visit	✓ 06.06.2014 06.06.2014 15:53	
Created on	✓ 24.04.2014	16.05.2014
Updated on	✓ 06.06.2014 06.06.2014 15:53	26.05.2014 26.05.2014 10:12
Latitude	✓ 48,1880074 19.05.2014 13:03	48,1921921 19.05.2014 13:04
Longitude	✓ 16,3556957 19.05.2014 13:03	16,3707256 19.05.2014 13:04
Updated (Geo-coordinates)	20140519130335112 19.05.2014 13:03	20140519130421972 19.05.2014 13:04

Note: Attention: Ensure that you choose to retain consistent data (e.g street and geo-coordinates from the same record).

- 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 .

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.

8. Click on Start Merge Process.

Requests for Change

You cannot apply changes to customer data yourself; these changes need to be approved by back office staff.

A request for change is added whenever you add, edit or delete account and person data. You can also request that duplicate companies and persons (not roles) are merged. Back office staff are informed of the request and can also apply the necessary changes to your ERP system.

When **adding** an account, person or role for a person in a company, a request for change is automatically submitted.

- 1. Switch to the desired person.
- 2. Click on Request for Change in the tree.

Note: If you want to change the person's role, select the desired role from the Role node in the person tree or under **Persons** in the company tree. Switch to the **Requests for Change** tab under Related Data.

- 3. Switch to the Person-related tab.
- 4. Select the desired option from the drop-down list, i.e. Update Person Data, Merge Persons or Delete Person.



 If you select **Delete Person**, a new request for change is added with the **RfC** type set to **Delete person** and the RfC status **New**. Click on (Submit) to submit the request for change. The RfC status is set to "Submitted".

- If you select Update Person Data:
 - 1. Enter a **Comment (Request)** if necessary.
 - 2. Save the record.
 - 3. The mask used to update records is displayed.
 - 4. Enter the desired changes in the fields on the rights. The current values are displayed on the left.
 - 5. Save the record.

A new request for change is added with the RfC type set to "Update person" and the RfC status "New". The desired changes are highlighted in yellow. You can still edit the record.

Chris Aki	Person T Administration Qualificat	Private e Specialty		Language German
 Chris Aki 	Person Related Role Rel	Vew or		ests 🍸 Approved Requests
- Characteristics - 🔀 Job Cards	Search Results			ubmit 🏟 Modify List Fields 🔺
- Complaints - Documents - Contact Times	Request date	RfC type Update person	RfC status New	Requested by <u>Alex Aussendienst (</u>
Requests for Change	Request for Change	Person		
	E I V V O Last Name (ori Aki First name (ori Chris Private e-mail Private phone Private Fax (or		Private phone Private Fax	Chris chris.aki@gmail.com
	Private mobile Private Countr Austria Private Postal		Private mobile Private Country a rivate Postal	

- 6. Click on » (Submit) to submit the request for change. The RfC status is set to "Submitted".
- If you select Merge Persons:
 - 1. Select the Target Person.
 - 2. Save the record.

A new request for change is added with the RfC type set to "Merge person" and the RfC status "New".

3. Click on » (Submit) to submit the request for change. The RfC status is set to "Submitted".

Your back office is informed on their start page that a request for change requires approval and can edit it, approve it (\checkmark) or reject it (\diamond). The RfC status is set to "Approved" or "Rejected". Back office staff can also merge companies and persons, see Merging Accounts and Persons on page 268.

You are informed of requests for changed that have been accepted or rejected on your start page.

Select **(Reference book**) > **Requests for Change** to display an overview of all requests for change.

The Account Related, Person Related, and Role Related tabs display requests for change by record type. Select one or more new requests for change (Ctrl+click) and click on » (Submit) to submit the requests for change.

Back office staff can select **(Reference Book)** > **Requests for Change** to edit, approve or reject requests for change.

3

Appointment Management

Learn to manage appointment.

Aurea CRM web's appointment management supports you in collaborating efficiently within your company and with your customers. You can:

- Display an overview of your appointments in the calendar, see Calendar on page 274.
- Display, edit and delete appointments, see Adding Appointments on page 280, Adding Activities on page 292, Adding Tasks on page 304 and Adding Other Appointments on page 307.
- Use filters to determine which appointments are displayed in the calendar, see Filtering Appointments on page 281.
- Handle conflicting appointments, see Appointment Planning on page 285.
- Send and reply to e-mails from appointments, see Activities and E-mails on page 299.
- Store other appointments such as conference visits, absences etc., see Other Appointments on page 306.
- Use tasks to structure your work, see Tasks on page 303.
- Schedule customer visits in the daily and weekly planning view, see Daily and Weekly Planning on page 308.

Calendar

The calendar displays activities, tasks and other appointments.

To open the calendar, select **Daily business**) > **Calendar**.

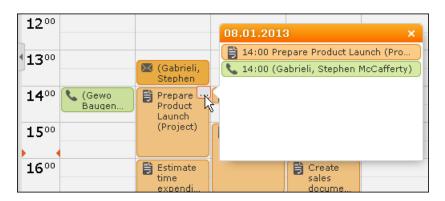
> 07.01 - 13.01.2013	New C	alendar Entry		Day	Work	Week V	Veek	Month	2 <
€ Jan 2013 እ		Mon 07.01.20	Tue 08.01.2013	Wed 09.01.20	Thu 10.01.2013	Fri 11.01.2013	Sat 12.01.201	3 Sun 13.01.20	
W Mon Tue Wed Thu Fri Sat Sun 1 31 1 2 3 4 5 6 2 7 8 9 10 11 12 13	07.00			•	^				1
3 14 15 16 17 18 19 20 4 21 22 23 24 25 26 27	0800								
5 28 29 30 31 1 2 3 6 4 5 6 7 8 9 10	0900		(Öst. Biathlon Simon						
Today: Tue 22 Jan, 2013 🗸 🔻	1000					📞 (AkiCo			
~ e	1100	📞 (Gewo		(ÖSV, Simon Eder)	Business lunch (update				
ly Next Activities 🛛 🔺	1200				software AG,				
Weekly project review 28.01.2013 13:00					Simon				
ly Next Tasks 🛛 🔺	1300		🔝 (Gabrieli,						
Prepare Product Launch Due 08.01.2013 16:00	1400	📞 (Gewo	Stephen Prepare Product	Estimate					
Estimate time expenditure Due 08.01.2013 17:30		Baugen	Launch (Project)		Create marketi				
Estimate costs Due 09.01.2013 14:00	1500		(Project)	Create docume (Sub-Pr	brochur (Sub-Pr				
Create documents Due 09.01.2013 17:00	1600		Estimate time expendi		Create sales docume				
Create marketing brochu Due 10.01.2013 16:00	17.00	📞 (AkiCo	(Sub-Pr		(Sub-Pr				1
	1800								

The different functions and features are explained below:

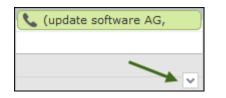
- Different types of appointment are indicated using different icons (for telephone calls, visits etc.). Click on (Edit Settings) to determine how appointments are color-coded (e.g. by type or rep).
- Click on **(Legend**) to display an overview of the color-coding in the calendar.
- Click on the entries 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).

	Mon	21.01.20	Tue 22.01.2
	•	Project Inst	allation (upd
0700			

• 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 281.
- Holidays are color-coded.
- If the time zone used by your device is changed (automatically or manually), you can determine that Aurea CRM takes the current time zone into account (provided you have the necessary access rights), see Date & Time Tab. You need to close and restart your web browser to display the new time zone in the calendar.

Various tasks that can be performed on calender are:

Navigating in the Calendar

You can navigate in the calendar using the following options:

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

<	₼	January 2013
<	Next	Jan 2013

- 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 308.
- Click on (Call Planning) to open the call planning area, see Call Planning on page 317.

Adding Appointments

To add a new appointment in the calendar:

1. Double-click on a free time slot in the calendar or click on a free time slot and click on New Calendar Entry.

Note: You can also add appointments from outside the calendar using the menus, see Adding Activities on page 292, Adding Tasks on page 304 and Adding Other Appointments on page 307.

2. Select whether to add a new activity, task or other appointment, or to add a new activity for yourself, your company or the last company/person you viewed, see Appointment Types on page 285.



- 3. When adding an activity, select the account or person the activity should be added for.
- 4. When adding an activity with a person, select their role (the function of the person at a particular company).
- 5. 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 half 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 285.

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.

Navigating in the Calendar

You can navigate in the calendar using the following options:

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

<	₽	January 2013
<	Next	Jan 2013

- 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).

<			Jan	2013	>
W	Mon	Tue	Wed	2006	Sun
1	31	1	2	2007	6
2	7	8	9	2008	13
3	14	15	16	2009	20
4	21	22	23	2010 2011	27
5	28	29	30	2012	3
6	4	5	6	2013	10
Today: Tue				2014	
				2015	
				2016	
				2017	2
				2018	. 🌥
My Next Activiti				2019	
My	vext	Act	with	2020	- ^

• Use the arrows to move forward or back one month

- When in the day view, hold down Ctrl and click on days in the calendar to display multiple days at once.
- Click on **Today** to display the current date in the day view.
- Click on (Daily & Weekly Planning) to open the daily and weekly planner, >> Daily and Weekly Planning on page 308.
- Click on (Call Planning) to open the call planning area, >> Call Planning on page 317,.

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Note: You can also add appointments from outside the calendar using the menus, >> Adding Activities on page 292, Adding Tasks on page 304 and Adding Other Appointments on page 307.

 Select whether to add a new activity, task or other appointment, or to add a new activity for yourself, your company or the last company/person you viewed, >> Appointment Types on page 285.



- 3. When adding an activity, select the account or person the activity should be added for.
- 4. When adding an activity with a person, select their role (the function of the person at a particular company).
- 5. 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 half 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 in the sidebar by clicking on their icon.
- You can reschedule appointments by dragging the appointment to the desired time (in all views except the month view) or to the desired date (in all views except the day view). Drag the top or bottom edge of the appointment to change the length of the appointment (not available in the month view).

Editing Appointments

Edit an appointment by entering the desired data in the fields. For more details, >> Appointment Types on page 285.

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.



Defining General Filters

To define a filter:

- 1. Click on **Y** (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 110.
- 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 **Y** (**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 2 (Reps and Rep Groups) in the sidebar. The Reps and Rep Groups window is displayed.

Reps and	Rep Groups	×
🗸 Save 🗦	🗙 Delete 🛛 💂 Add/Remove Reps	
Rep Set:	1	_
	Current Rep	
	Group	
<u>2</u> 2	Groupleader	
🗹 💁	Deputy	
	OK Cancel	

- 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 92.

b. Select the desired rep and click on OK.

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 110.
- 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 **Y** (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 **2** (Reps and Rep Groups) in the sidebar.

The Reps and Rep Groups window is displayed.

Reps an	d Rep Grou	ıps		×
🗸 Save	🗙 Delete	💂 Add/Remove Reps		
Rep Set:				
Solution	🚨 Current F	?ер		
	Group			
	🔓 Grouplea	der		
2	Deputy			
			OK	Cancel

- 2. Enable the check boxes next to the reps or groups whose appointments should be displayed.
- 3. To add additional reps to the list:
 - a. Click on Add/Remove Reps.

The **Select Rep** window is displayed, >> **Selecting Reps** on page 92.

- 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 **a** (**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. You can move the appointment in this area while taking into account the availability of all reps.

Scheduling							
Reps		09.01.20	13 13:00 -	16:00			
John Doe		1		I			
Simon Eder			2	L.			
Simon Fourcade		ſ∰ E	-				

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

Activities are used to store details regarding contact with customers

For further details, see Activities on page 285.

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 303.

Other appointments allow you to store when you are unavailable (conferences, sick leave, vacations, visits to doctors etc.), see Other Appointments on page 306.

Activities

Learn about activities appointment types.

You can add an activity as follows:

- In the calendar, see Adding Appointments on page 280.
- From outside the calendar, see Adding Activities on page 292.

For information on recurring activities, see Recurring Activities on page 294.

For information on e-mails, see Activities and E-mails on page 299.

Adding Activities

To add an activity:

- 1. Select (Daily business) > New Activity.
- 2. Select who the activity should be added for (person, account, record in your favorites). Search for and select the desired account or person.
- **3.** When adding an activity with a person, you need to select or add their role (the function of the person at a particular company).
- 4. The activity is opened.

🖄 New: A	ctivity						
IType	🜡 Visit 🗸	Assigned by	Arno Admin (9500)	8	!Rep	Sandra Service	9
Subject							
Business ar	+ ~	Purpose		+ ~ <u>IA</u>	ctivity sta	Scheduled	~
Satisfaction	Indifferent ~	Activity result		~	Starts on	07.05.2013	~
					Starts at	16:42	
All day activ		Private			Ends on	07.05.2013	~
					Ends at	17:12	
Fixed activit		Follow-up d		~	Location	Borsteler Chausser 22453 Hamburg, G	
Subject	Participants Ques	tionnaires / Po	ortfolios Marketi	ing Activi	ty Link	s System	
Text	1						<u>×</u> ₿
Sample car		Decument C					
Sample car		Document S					

- 5. The current date and time are automatically entered as the start of the activity. You can edit the date and time.
- 6. Enter further information concerning the activity on the following tabs (not all tabs are available for all activity types):
 - Subject
 - **Participants:** Select the activity's participants.
 - Questionnaires/Portfolios: 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 332.
 - Marketing Activity: You can enter a person's response to a marketing activity here, see Responses on page 533.
 - Links: The fields in this tab are used to 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.
- 8. Choose whether to open the activity in the calendar or tree view.

You can add additional external participants, see LINK.

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 a (Select Rep), to select the desired rep in a separate window, see Selecting Reps on page 92. You can then select the desired participation type from the rep's context menu.

List	Tree				
🛖 I 🛖	BCDEFG	H I J K L	M N O P Q	RISITIUIVI	WIXIYIZI
<	🗏 Menu	×			÷.
	Required				
	Optional			Requ	ired
	For Information	Ф			
	Add to Favorites				

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: $\mathbf{0}$ = Required, $\mathbf{0}$ = Optional and $\mathbf{0}$ = For Information
- In the S (Status) column: = Accepted, = Open, = Declined, = Not relevant

The person or company for which the appointment was added is displayed as a link.

- 3. To change the participation type and status, select the options available under **Participation Type** or **Participation Status** in the participant's context menu.
- 4. Save the record.

Recurring Activities

You can add recurring activities that take place at regular intervals.

You can determine the frequency (e.g. daily, weekly, monthly or yearly) in the first activity (the main activity), from which you can then generate the remaining appointments.

Adding Recurring Activities

To add a series of recurring activities:

- 1. Add the first (main) activity.
- 2. Select **Recurrence** from the context menu. The **Appointment Recurrence** window is displayed.

Appointment Recurr	ence	×
Recurrence pattern		
 Daily Weekly Monthly Yearly 	Every 1 week(s) on: Monday Tuesday Wednesday Thursday Friday Saturday Sunday	
Include Weekends Holidays		
Series duration		
Ends after <u>10</u> Ends on	occurences	
Delete Recurrence	Save Cance	I

- 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.
- Save the data. The activities are generated. Recurring activities are indicated using the O icon.

Note: The following fields are **not** transferred from the main activity to subsequent activities: **Start**, **Activity result**, **Activity costs**, **Activity status**, **Response** (Marketing Act.) 1-5, Survey on, Follow-up date, 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 on page 297.

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.
- 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. Select **Recurrence** from the main activity's context menu.
- 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. Select **Recurrence** from the context menu.
- 3. Edit the recurrence pattern and click on **Save**.

A message is displayed informing you that this activity is part of a series of activities, and you are asked if you wish to use the activity as the main activity of a new series.

4. Click on OK.

All activities in the series following this activity are deleted and the appointments in the series are generated anew.

Activities and E-mails

Notifying Reps

You can send an e-mail to all an activity's **internal participants**, e.g. if you need to reschedule the appointment.

To notify the reps:

1. Select Notify Recipients from the context menu of the activity.

If your administrator has determined that e-mails are sent from your e-mail client, your e-mail client is opened. If e-mails are sent by via the Aurea CRM server, the following window opens:

Notify about record			n x
You can send this record to any other rep and/or external recipient. Please specify	what you want	to send:	<u>^</u>
Recipients:			
Simon Eder (
John Doe (j.doe@test.com)			
Ms. Chris Aki (
CC:			
 Handas Har-affalis (angine strendfint, Tapainte ent) 			
Additional internal recipients:		2	
Additional external recipients:			
Subject: Rescheduling			E
Body: Unfortunately we have to reschedule for 17:00 due to the room being booked until kind regards, Arthur	16:45/		
Insert update CRM web link	Inse	rt Signature	
Request a delivery receipt	Send	Cancel	-

- 2. Enable the check boxes next to the persons you wish to notify under **Recipients**.
- 3. You can add additional recipients to the **Additional internal recipients** and **Additional external recipients** fields.
- 4. The contents of the **Subject** and **Text** fields in the activity are transferred to the e-mail, but you can still edit them in the e-mail.
- 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.

Adding Activities

To add an activity:

- 1. Select (Daily business) > New Activity.
- 2. Select who the activity should be added for (person, account, record in your favorites). Search for and select the desired account or person.
- **3.** When adding an activity with a person, you need to select or add their role (the function of the person at a particular company).
- 4. The activity is opened.

🗟 New: A	ctivity						
IType Subject	🕹 Visit	✓ Assigned by	Arno Admin (9500)	2	!Rep	Sandra Service	2
Business ar		+ v Purpose		+ ~ 9	Activity sta	Scheduled	~
Satisfaction	Indifferent	✓ Activity result		~	!Starts on	07.05.2013	~
					Starts at	16:42	
All day activ		Private			Ends on	07.05.2013	~
					Ends at	17:12	
Fixed activit		Follow-up d		~	Location	Borsteler Chausse 22453 Hamburg, (
Subject	Participants	Questionnaires / Po	ortfolios Marketin	a Activ	vity Link	ks System	
Text	11						<u>×</u> ₿
Sample car		Document S					

- 5. The current date and time are automatically entered as the start of the activity. You can edit the date and time.
- 6. Enter further information concerning the activity on the following tabs (not all tabs are available for all activity types):
 - Subject
 - Participants: Select the activity's participants.
 - Questionnaires/Portfolios: 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, >> Carrying Out a Survey on page 332.

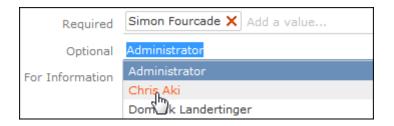
- Marketing Activity: You can enter a person's response to a marketing activity here, >> Responses on page 533.
- Links: The fields in this tab are used to link the activity to various other records. This can occur automatically as part of a process or you can enter the link manually in the appropriate field.
- 7. Save the record.
- 8. Choose whether to open the activity in the calendar or tree view.

You can add additional external participants, >> LINK.

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 a (Select Rep), to select the desired rep in a separate window, >> Selecting Reps on page 92. You can then select the desired participation type from the rep's context menu.

List	Tree				
🛖 I 🛖	BCDEF		M N O P Q	RISITIUN	VIWIXIYIZI
	🗏 Menu	×			+
	Required				
	Optional			R	equired
	For Information	(hr)			
0404	Add to Favorites	U			

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: ① = Required, ② = Optional and ① = For Information

The person or company for which the appointment was added is displayed as a link.

- 3. To change the participation type and status, select the options available under **Participation Type** or **Participation Status** in the participant's context menu.
- 4. Save the record.

Recurring Activities

You can add recurring activities that take place at regular intervals.

You can determine the frequency (e.g. daily, weekly, monthly or yearly) in the first activity (the main activity), from which you can then generate the remaining appointments.

Adding Recurring Activities

To add a series of recurring activities:

- 1. Add the first (main) activity.
- 2. Select Recurrence from the context menu.

The **Appointment Recurrence** window is displayed.

Appointment Recurre	ence ×
 Recurrence pattern Daily Weekly Monthly Yearly 	Every 1 week(s) on: Monday ✓ Tuesday Wednesday Thursday Friday Saturday Sunday
Include Weekends Holidays	
Series duration Series duration Ends after 10 o Ends on	ccurences
Delete Recurrence	Save Cancel

- 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.
- Save the data. The activities are generated. Recurring activities are indicated using the O icon.

Note: The following fields are **not** transferred from the main activity to subsequent activities: **Start**, **Activity result**, **Activity costs**, **Activity status**, **Response** (Marketing Act.) 1-5, Survey on, Follow-up date, 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 on page 297.

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.
- 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. Select **Recurrence** from the main activity's context menu.
- 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. Select Recurrence from the context menu.
- 3. Edit the recurrence pattern and click on Save.

A message is displayed informing you that this activity is part of a series of activities, and you are asked if you wish to use the activity as the main activity of a new series.

4. Click on OK.

All activities in the series following this activity are deleted and the appointments in the series are generated anew.

Adding Recurring Activities

To add a series of recurring activities:

- 1. Add the first (main) activity.
- 2. Select Recurrence from the context menu.

The **Appointment Recurrence** window is displayed.

Appointment Recurr	ence	×
 Recurrence pattern — Daily Weekly Monthly Yearly 	Every 1 week(s) on: Monday Tuesday Wednesday Thursday Friday Saturday Sunday	
Include Weekends Holidays		
 Series duration Ends after 10 c Ends on 	ccurences	
Delete Recurrence	Save	Cancel

- 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 Q icon.

Note: The following fields are **not** transferred from the main activity to subsequent activities: **Start**, **Activity result**, **Activity costs**, **Activity status**, **Response** (Marketing Act.) 1-5, **Survey on**, **Follow-up date**, **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 on page 297.

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. Select **Recurrence** from the main activity's context menu.
- 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. Select Recurrence from the context menu.
- 3. Edit the recurrence pattern and click on Save.

A message is displayed informing you that this activity is part of a series of activities, and you are asked if you wish to use the activity as the main activity of a new series.

4. Click on OK.

All activities in the series following this activity are deleted and the appointments in the series are generated anew.

Activities and E-mails

Learn about activities and e-mails.

Notifying Reps

You can send an e-mail to all an activity's **internal participants**, e.g. if you need to reschedule the appointment.

To notify the reps:

1. Select Notify Recipients from the context menu of the activity.

If your administrator has determined that e-mails are sent from your e-mail client, your e-mail client is opened. If e-mails are sent by via the Aurea CRM server, the following window opens:

Notify about record			•	×
You can send this record to any other rep and/or external recipient. Please specify a	what you wa	ant to send:		-
Simon Eder (
✓ John Doe (j.doe@test.com)				
Ms. Chris Aki (
CC:				
🖌 Haarian Herriffinis (anapitas constitute ("papitas ant)				
Additional internal recipients:			E 0	
Additional external recipients:				
Subject:				11
Rescheduling				
Body: Unfortunately we have to reschedule for 17:00 due to the room being booked until kind regards, Arthur	16:45/			
Insert update CRM web link				
more opage even not inte	I	nsert Signature	8	
Request a delivery receipt	Send	Cancel		-

- 2. Enable the check boxes next to the persons you wish to notify under **Recipients**.
- 3. You can add additional recipients to the **Additional internal recipients** and **Additional external recipients** fields.
- 4. The contents of the **Subject** and **Text** fields in the activity are transferred to the e-mail, but you can still edit them in the e-mail.
- 5. Use the following check boxes to carry out the corresponding action: Insert Aurea CRM web link, Insert Aurea CRM win link, Request a delivery receipt, Request a read receipt. Your administrator is responsible for defining which options are available.

- 6. If your administrator has enabled the corresponding option, click on **Insert Signature** to insert your e-mail signature.
- 7. The documents linked to the activity are added as attachments.

Note: Your administrator can determine that certain types of files or files exceeding a certain size are not sent. When sending e-mails from your e-mail client, no attachments can be added.

8. Click on Send to send the e-mail.

Notifying Reps

You can send an e-mail to all an activity's **internal participants**, e.g. if you need to reschedule the appointment.

To notify the reps:

1. Select Notify Recipients from the context menu of the activity.

If your administrator has determined that e-mails are sent from your e-mail client, your e-mail client is opened. If e-mails are sent by via the Aurea CRM server, the following window opens:

Notify about record	c	⊐ × □
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:		
 Harden (and a standard and a standard and) 		
Additional internal recipients:	2	
Additional external recipients:		
Subject:		E
Rescheduling		- 11
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	Insert Signature	
Request a delivery receipt Ser	nd Cancel	

- 2. Enable the check boxes next to the persons you wish to notify under **Recipients**.
- 3. You can add additional recipients to the Additional internal recipients and Additional external recipients fields.
- 4. The contents of the **Subject** and **Text** fields in the activity are transferred to the e-mail, but you can still edit them in the e-mail.
- Use the following check boxes to carry out the corresponding action: Insert Aurea CRM web link, Insert Aurea CRM win link, Request a delivery receipt, Request a read receipt. Your administrator is responsible for defining which options are available.
- 6. If your administrator has enabled the corresponding option, click on **Insert Signature** to insert your e-mail signature.
- 7. The documents linked to the activity are added as attachments.

Note: Your administrator can determine that certain types of files or files exceeding a certain size are not sent. When sending e-mails from your e-mail client, no attachments can be added.

8. Click on Send to send the e-mail.

Tasks

Learn about task appointment types.

You can add tasks as follows:

- In the calendar, see Adding Appointments on page 280.
- From outside the calendar, see Adding Tasks on page 304.

In order to organize complex tasks, you can:

- Add tasks for yourself or for (several) other reps.
- Divide tasks into sub-tasks.
- Reschedule tasks, in which case the reps entered in the task receive appropriate messages.

Adding Tasks

To add a new task:

1. Select (Daily business) > New Task.

	New:	Task							
~	0								
		User	Sandra Service	2 .	ssigned by (na	Arno Admin (9500)		Private	
		Status	Open	~	Priority	* * *		Туре	~
		Subject	Review trial results						
		Text							
		Link		Q, X					
6		LINK		~ ~					
	Date	L							
		Starts on	07.05.2013	¥	*Due on		~		
		Starts at	16:45		Due at				
		Ends on		~	Completed on		~		
		Ends at			Completed at				

- 2. Enter a date in the **Due on** field.
- 3. Use the Link field to link the task to another record.
- 4. Save the record.

Filtering Tasks

You can use filters in the task search to restrict the search to those tasks assigned to you or to your open tasks:

1. Select (Daily business) > Tasks.

Search Results 🕊 🖞 1 - 1 of 1 🗦 ≫						🖺 New 🕞	Completed 🛛 N	tissed 🗷 🗸 🗘	Modify List Fields
1	User (na	Assigned by	Status	Priority	Туре	Due on	Subject	Private	Link
	Arno Admin	Arno Admin (95	Open	High					

- 2. Click on **My Tasks** to restrict the view to only those tasks where you have been entered as the task's rep or that you have assigned to another rep.
- 3. Click on All completed tasks to restrict the view to completed tasks where you have been entered as the task's rep or that you have assigned to another rep.
- 4. Click on **Forwarded Tasks** to restrict the view to incomplete tasks that you have assigned to another rep.
- 5. Click on **No Filter** 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:

🖹 Tas	ik Deliver	product presentation			
$\equiv \mathscr{N}$	< 0 W	🗸 🕞 Completed 🛛 Missed			
	User	Arno Admin (9500)	Assigned by (na An	no Admin (9500)	Private
	Status	Open	Priority 🕇	* * *	Туре
	Subject	Deliver product presentation			
	Text				
	Link				
Date	e				
	Start	21.04.2011 - 10:35	Due		
	End		Completed		

Or select the task in the search results and click on **Completed** or **Missed** in the header:

Search	Results << < 1	1 of 1 > >>		📓 New 😡	Completed	Missed 🗷 🗸 🛱	Modify List Fields		
1	User (na	Assigned by	Status	Priority	Туре	Due on	Completed	Private	Link
$\mathcal{O} \equiv \mathbf{v}$	Arno Admin	Arno Admin (95	Open	High			Deliver produc.		

Task Hierarchy

You can create a hierarchy of tasks to depict complex structures for projects.

To structure a project with sub-tasks, add a new sub-task to a task on the **Sub-Tasks** tab under **Related Data**.

Adding Tasks

To add a new task:

1. Select (Daily business) > New Task.

	New: Task						
~	0						
1	User	Sandra Service	Assigned	l by (na Arno Admin (9500)		Private	
		Open		Priority 🗙 🗙 🗙		Туре	\sim
	Subject	Review trial results					
	Text						
			×				
	Link		· ^				
1	Date						
	Starts on	07.05.2013	¥	*Due on	~		
	Starts at	16:45		Due at			
	Ends on		Y Co	mpleted on	¥		
	Ends at		Co	impleted at			

- 2. Enter a date in the **Due on** field.
- 3. Use the **Link** field to link the task to another record.
- 4. Save the record.

Filtering Tasks

You can use filters in the task search to restrict the search to those tasks assigned to you or to your open tasks:

1. Select (Daily business) > Tasks.

5	Search Results « < 1 - 1 of 1 > >> 📓 New 😡 Completed 🔕 Missed 🖼 🗸 🖄 Modify List Fie											
	1	User (na	Assigned by	Status	Priority	Туре	Due on	Subject	Private	Link		
		Arno Admin	Arno Admin (95	Open	High							

- 2. Click on **My Tasks** to restrict the view to only those tasks where you have been entered as the task's rep or that you have assigned to another rep.
- 3. Click on All completed tasks to restrict the view to completed tasks where you have been entered as the task's rep or that you have assigned to another rep.
- 4. Click on **Forwarded Tasks** to restrict the view to incomplete tasks that you have assigned to another rep.
- 5. Click on **No Filter** 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 Deli	iver product presentation		
≡ 🖋 🗸 ⊘	👿 🗸 🕞 Completed [🖸 Missed		
	User Arno Admin (9500)	Assigned by (na Arno Admin (9	9500) Private
St	tatus Open	Priority 🚖 🚖 🚖	Туре
Sul	bject Deliver product presentation		
	Text		
	Link		
Date			
1	Start 21.04.2011 - 10:35	Due	
	End	Completed	

Or select the task in the search results and click on **Completed** or **Missed** in the header:

Search	Results << < 1	1 of 1 > >>	Completed	Missed 🗷 🗸 🔅	Modify List Fields				
1	User (na	Assigned by	Status	Priority	Туре	Due on	Completed	Private	Link
e≡×	Arno Admin	Arno Admin (95	Open	High			Deliver produc		

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**.

Other Appointments

Learn about other appointment types.

You can add other appointments as follows:

- In the calendar, see Adding Appointments on page 280.
- From outside the calendar, see Adding Other Appointments on page 307.

Adding Other Appointments

To add other appointments:

- 1. Select (Daily business) > Other Appointments.
- 2. Click on \oplus (New).

Ď New: Other A	New: Other Appointment												
	Arno Admin (9500) 07.05.2013	ý	Occupation Ends on	Holiday 08.05.2013	+	Duration	1						
Starts at	00:00		Ends at			Unit	Day(s) 🗸						
Approval by (na Details			Status	Open		All day							
Subject Text						Private							

- 3. Enter the type of appointment in the **Occupation** field and edit the dates and times as required.
- 4. The rep who needs to approve the appointment is entered automatically in the Approval by (name) field. This rep is informed that an appointment requires approval on their start page.
- 5. Save the record.

Adding Other Appointments

To add other appointments:

- 1. Select (Daily business) > Other Appointments.
- 2. Click on \oplus (New).

D New: Other ∧													
	Arno Admin (9500) 07.05.2013	÷	Occupation Ends on	Holiday 08.05.2013	+ -	Duration	1						
Starts at							Day(s)	~					
Approval by (na Details			Status	Open		All day							
Subject						Private							
Text													

- 3. Enter the type of appointment in the **Occupation** field and edit the dates and times as required.
- 4. The rep who needs to approve the appointment is entered automatically in the Approval by (name) field. This rep is informed that an appointment requires approval on their start page.
- 5. Save the record.

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:

- Select (Daily business) > Daily & Weekly Planning. Or click on 2 (Daily & Weekly Planning) in the calendar. The search area and calendar are displayed.
- 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. Select the type of record you wish to add activities for in the drop-down list in the header:

(крі	^
Account	
KPI	
Role	

Note: By default, you can search for accounts, roles (i.e. persons assigned a role at an account) and KPI. Your administrator can configure additional search options, see DayWeekPlanning in the Aurea CRM web Administrator Guide.

4. Open the search area using the arrow at the top of the screen. Enter your search criteria and click on **Start Search**.

The search results are displayed in the results list between the search mask and calendar.

Account	t name Account n	ame, Synonym	Acco	unt type			Str	reet			
	City			from PC			MicroB				,
	ristic			ification		,	Key Acco				
	cteristic		~								
	+ Add more		~								
.ax. 5	✓ Records per pa	ige						Res	et	Start Sea	arch
earch	Results << < 1	- 5 of 50+ > >>				New	🗷 🗸 🗘 Mo	dify List F	ields 🖁	Quick Can	npaig
1	Account	Account	Classific	Postal	City		Street	Telep	phone	Action r	e
	Pharmacy	_Albanien Ap	-								
	Pharmacy	_Albanien Ap	-								
	Pharmacy	_Albanien Ap	С								
	Other	1	С		Stuttgart						
	Health ins	61	÷	80802	München		Karlsplatz				
>	06.01 - 11.01 Mon 06.01.201		w Calendar E		Day	_	rk Week	Week		ath 20.01.2014	12
						_					12
						,	Thu 09.01.2014				Ì
800						,					12
9 ⁰⁰						,	Thu 09.01.2014				
3 ⁰⁰ 9 ⁰⁰ 1 ⁰⁰						,	Thu 09.01.2014				5
3°°° 9°°° 1°°°						,	Thu 09.01.2014				10
300 900 100 200 300						1 • (E	Thu 09.01.2014				
B ⁰⁰ 9 ⁰⁰ 1 ⁰⁰ 2 ⁰⁰ 3 ⁰⁰						1 • (E	Thu 09.01.2014				
300 300 300 300 300 500						1 • (E	Thu 09.01.2014				

5. Drag the desired account or person to the desired time slot in the calendar to add an activity.

If contact times have been defined for the account or person (see Contact Times on page 243), these times are colored white in the calendar.

The activity is added with the activity default values your have defined.

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 274.
- 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.

To open the resource view:

1. Select (Daily Business) > Resources.

																		1	с.
23	.04	- 2	6.04	1.20	14		New /	Activi	ty		e	-				•			
c			Apr	2014			>	2	Reps	Wed 23.04.2	2014	Thu 3	24.04.3	2014		ri 25	i.04.	201	4
Ν	Mon	Tue	Wed	Thu	Fri	Sat	Sun			04 08 12 10	5 20 0	4 08	12 1	6 20	04	08	12	16	20
4		1	2	3	4	5	6	^	R&D										
5	7	8	9	10	11	12	13		Miranda Meyer				٩.						
6	14	15	16	17	18	19	20		Peter Parker				-		0				
7	21	22	23	24	25	26	27	^	Sales Italy						_				
8	28	29	30	1	2		4		Lisa Simpson	1 No.									
9	5	6	7	8	9					📞 Mo									
	То	day:	Tue	13 M	ay, 3	2014		^	Support										
							~ 🔻		Simon Fourcade										
							v ģ		Stephen Smith										

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.

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:

 \oplus

Θ

• Click on the header and drag it left or right to scroll:

Reps	т	14	Fri 02.05.2014							
	04	08	12	16	20	04	08	12	16	20
Stephen Smith								I		

• 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.

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 A (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.

2	Reps	014							
		28	29	30	1	2	3	4	1
^	R&D								
	Miranda Meyer								
	Peter Parker								
^	Sales Italy								
	Lisa Simpson			۵	0				
^	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

You can edit the activities as follows:

- Use the mouse to move activities 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 (rep): Solution
 You can drag these activities to another rep using the mouse.
- 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.

Private activities (i.e. where the **Private** field is enabled) are indicated with the **B** icon.

- 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.

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 - 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:

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• Click on the header and drag it left or right to scroll:

💂 Reps	т	14	Fri 02.05.2014								
	04	08	12	16	20	04	08	12	16	20	
Stephen Smith											

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- 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.
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 - 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.

8	Reps	CW 18/Apr 2014								
		28	29		30	1	2	2	3	4
^	R&D									
	Miranda Meyer									
	Peter Parker									
^	Sales Italy									
	Lisa Simpson				ø	0				
^	Support									
	Simon Fourcade									
	Stephen Smith		I	I					I	

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).

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- 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.

Private activities (i.e. where the **Private** field is enabled) are indicated with the **B** icon.

- 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.

Planning Routes

You can define routes that determine the order in which you visit customers.

You can add accounts and persons to routes and automatically add activities for the customers on your route.

To add and manage routes:

1. Select (Daily business) > Route planning.

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2. Your routes are listed under Search Route.

Click on \oplus (**New**) to add a new route. Enter a **Route name** and **Route-No.** You are automatically entered as the **Route User**.

3. The **Search Route member** area displays all accounts and persons on the selected route.

Click on **Add Account** or **Add Person** to add a new account or person to the route.

Enter a value in the **Order** field to determine the order in which customers assigned to the route are visited. Records where no value is entered in this field are added to the start of the route.

Enable the **Plan** check box to add an activity for this customer when automatically generating routes.

Note: You can also assign customers to routes by selecting **Add to route** from the record's context menu.

- Enter the date the route should start on in the Starts on field. Click on Start Search to list your activities on this date.
- 5. Click on **Plan route** to automatically create the defined activities (**Type** "Visit") on the selected date.

Call Planning

Learn about the call planning feature.

The automatic call planning feature allows you to schedule and add customer visits for certain times based on the following criteria:

- ABC classification of the account or person
- The contact times entered (e.g. visiting or opening hours)
- The target number of visits per year
- Geo-coordinates
- The rep's work hours
- · Marketing objectives due to end soon

To access the call planning area:

1. Select (Daily business) > Call Planning.



- 2. Define a time period in the Date from and Date to.
- 3. Select a **Start location**. If your visit lasts for several days, enter your **Overnight Location** to determine where you are based each day.
- 4. Select the Account Manager that the calls should be generated for.
- 5. Click on **Select Filter** to load a filter to restrict the customers to visit and thereby define a target group.
- 6. Click on Start.
- 7. A list of suggested activities is displayed.

Select one of the suggested activities to display the location of the associated company of person in the map beneath the list.

Enable the **Plan call** check box in those suggested activities you wish to create a call for.

8. Click on Create Calls to create the activities.

Note: For further information contact your administrator. If your company has purchased the necessary licenses, your administrator can choose to activate the option to use geo-coordinates.

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 into account when planning routes. Such as open work orders, the customer's ABC classification, the ratio of actual visits to target visits, etc.

You can also plan routes manually without suggestions by adding customers to a route. Routes you have planned manually can be optimized by the Aurea CRM web.

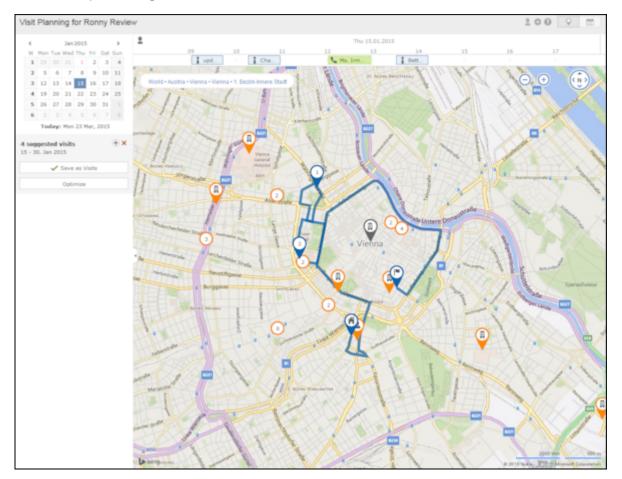
Routes can be planned for a single day or over several days. Only the stops on the route on the day selected in the calendar are displayed. If you edit a route (e.g. add customers or activities), the route is recalculated automatically.

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 work hours are determined by the general work hours.

Select (Collaboration) > Visit Planning to open the visit planning area or select Visit Planning from a company or person's context menu.

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:

Мар

- The location of your customers on the map are color-coded:
 - Orange: The location of your customers (🗡 companies and 🚩 persons).
 - Orange circle with number (¹²): 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 (V): Customers originally suggested in the route, but that you have manually removed from the route.
- Gray (
): Customers that are either part of a route or suggested as part of a route on another day.
- The currently selected location is indicated by a circle below the pin (\mathbf{X}) .
- 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).

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.

7 8	New Suggestions						
5	Start Date	15.01.2015	~	End Date	15.01.2015 ~		
÷	Start from	Home	~	Start next days from	Home		
	Suggestions wi	II be created f	or Ronn	y Review.			
				Create Suggested Route	Cancel		

- 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. 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.

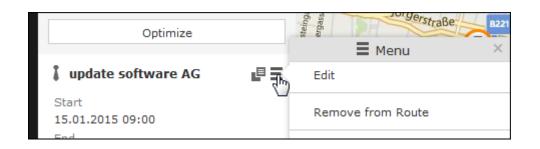
• Once you are satisfied with the route, click on **Save as Visits**. Activities are automatically generated (type = "Visit") based on the suggestions in the route.

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 l icon in both the timeline and sidebar. Existing activities and absences are indicated using the same icon as in the calendar (e.g. I for a visit).
- Click on an activity or visit suggestion to highlight the customer on the map with a circle beneath the pin (2).
- 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 **a** (**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, see Defining General Filters on page 283. 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.

Planning Visits on the Map

You can display your visits and customers on a map in Aurea CRM.

This allows you to schedule additional visits based on where you are at a specific time.

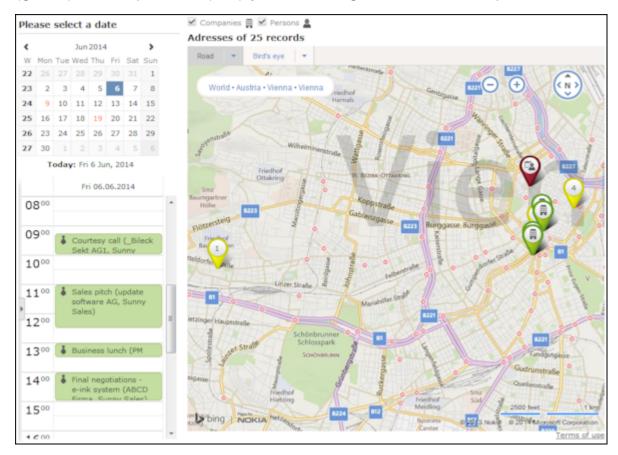
Two methods are available for adding visits on the map:

- **Method 1:** Display all scheduled visits and add visits for any account or person displayed on the map.
 - 1. Select (Daily business) > Plan Visits on Map to open the map.

By default, today's date is selected in the calendar on the left and the visits scheduled for the selected day are displayed on the map (in yellow). Select a different date in the calendar to display that day's visits. The numbers indicate the order in which the visits are scheduled.

The day's schedule is displayed beneath the calendar.

2. Enable the **Accounts** and/or **Persons** check boxes to display the accounts (green) and/or persons (red) you are assigned to on the map.



 Click on a yellow pin to display further information concerning the visit (e.g. time and address).



4. Click on a customer (green or red pins) to display a popup containing information on the customer. Click on New Visit in the popup to add a new visit. The new visit is displayed in the list on the left and is displayed in the map once the

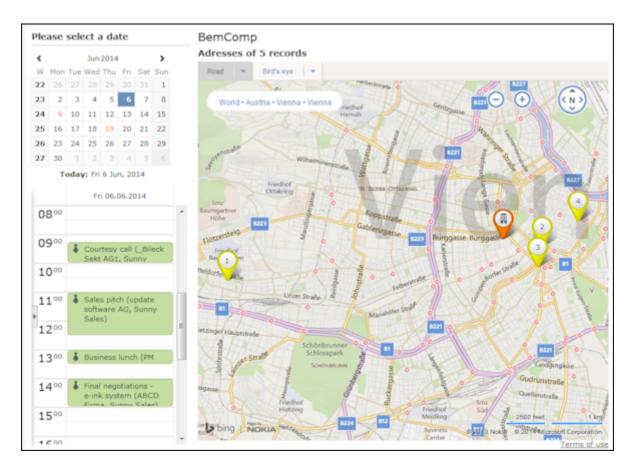
view is refreshed (🏧 > Refresh Working Ar	ea).
---	------

Mr. Sido Murat	×
Form of address Mr. Acad. Title	0
Last Name Murat	27 4
First Name Sido	
Company JOST AG	÷ []
New Visit	

Note: If no visits are scheduled on the currently selected date, the map centers on your current location.

• Method 2: Add new visits for a person/account based on nearby scheduled visits.

Click on \mathbb{R} (**Plan Visit on Map**) when viewing an account or person. The map is displayed. The account/person is displayed as an orange pin.



You can access the general functions described above, however the check boxes used to display accounts and persons on the map are not available.

4

Surveys

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 How the Activity is Executed on page 534.

Defining Questionnaires

Learn to define questionnaires.

To define a questionnaire:

- 1. Select (Settings) > Maintenance > Questionnaire.
- 2. Click on \oplus (New).
- 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.
- Define the questions and answers, see Defining Questions on page 329 and Defining Answers on page 331.

Defining Questions

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 331), 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 331.

• 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 Code and Field Number 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 or activity: 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 Code** and **Field Number** 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

To define an answer:

- 1. Click on **Answers** 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.

Defining Questions

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 331), 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 331.

- 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 Code and Field Number 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 or activity: 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 Code** and **Field Number** 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

To define an answer:

- 1. Click on **Answers** 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 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.

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Contact Person Julian Eberhard		
Form of address	Title	
First Name Julian	Last Name Eberhard	1
Tel 1	Mobile Tel.	
Company Gewo Baugenossenschaft		
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Street	Country	
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- 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.

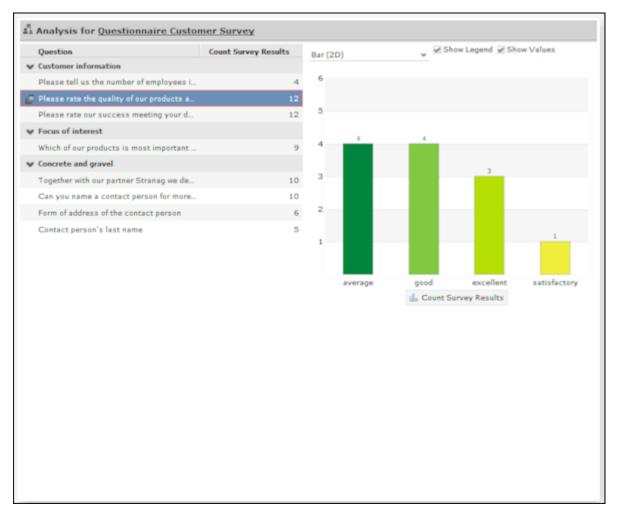
You can still edit the answers in a questionnaire that has been saved. Once you have clicked on **Finalize survey**, the questionnaire can only be edited by your administrator.

Evaluating Questionnaires

Learn to graphically evaluate questionnaires.

To display the evaluation of a questionnaire:

- 1. Select **Questionnaire Analysis** from the questionnaire's context menu.
- 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.

5

Document Management

You can store existing documents in Aurea CRM web's database, e.g. 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 create and manage documents.

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 Master data) > Documents and start the search.
- Open a record (e.g. an offer) and switch to the **Document Links** or **Documents** tab.
- 2. You can 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 187.

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 (Master data) > My 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 and click on Q (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

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 \square (Master Data) > Documents and click on \oplus (New).
 - Open the record (e.g. an activity) and switch to the Document Links tab under Related Data. Click on ⊕ (New) and select Upload new document.
- 2. Click on **Select Files** in the **Upload Documents** window and select the desired document(s).

You can also drag the document(s) to the window using your mouse.

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Keyword		Drop your W ⁴ e.	
			Cancel

- **3.** Enter data used to search for the document(s) later, e.g. the **Document Class**.
- Select an entry in the Document Group field to determine who can access the document(s), e.g. "Sales" or "Management".
- 5. Save the record. The record is displayed in tab view.

Linking an Aurea CRM Document with a Record

- 1. Open the record (e.g. an activity) and switch to the **Document Links** tab under **Related Data**. Click on ⊕ (New) and select **Existing update.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. Either:
 - Open a record containing a document field, e.g. the **Logo** field in an account.
 - Select (Master Data) > Documents from the menu and search for the document you want to replace. Click on the Title field in the search results.
- 2. Click on Q (Select/Upload Document) next to the document field.
- 3. Select Upload Document from the menu.
- 4. Click on **Browse** and select the desired document.
- 5. Enter data used to search for the document later, e.g. the **Document Class**.

- 6. Select an entry in the **Document Group** field to determine who can access the document, e.g. "Sales" or "Management".
- 7. Save the record.

Deleting Documents

To delete a document:

- 1. Select (Master data) > 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 \times (**Delete**) to remove the current document from the field.

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 **Master data**) > **Documents** and start the search.
- Open a record (e.g. an offer) and switch to the **Document Links** or **Documents** tab.
- 2. You can 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, >> CRM.launcher on page 187.

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.

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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

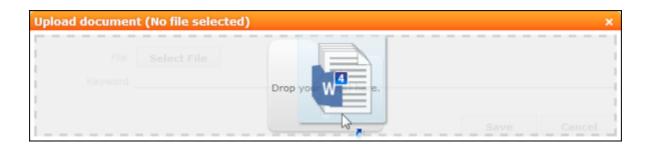
Note: If your administrator has determined that you can upload multiple documents at once (see Configuration Settings > Documents in the CRM.core Administrator Guide), you can select multiple documents of various types or drag them from your local file system to Aurea CRM.

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 (Master Data) > Documents and click on ⊕ (New).
 - Open the record (e.g. an activity) and switch to the **Document Links** tab under **Related Data**. Click on ⊕ (New) and select **Upload new document**.
- Click on Select Files in the Upload Documents window and select the desired document(s).

You can also drag the document(s) to the window using your mouse.



- **3.** Enter data used to search for the document(s) later, e.g. the **Document Class**.
- Select an entry in the Document Group field to determine who can access the document(s), e.g. "Sales" or "Management".
- 5. Save the record.

The record is displayed in tab view.

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- 1. Open the record (e.g. an activity) and switch to the **Document Links** tab under **Related Data**. Click on ⊕ (New) and select **Existing update.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. Either:
 - Open a record containing a document field, e.g. the **Logo** field in an account.
 - Select (Master Data) > Documents from the menu and search for the document you want to replace. Click on the Title field in the search results.
- 2. Click on Q (Select/Upload Document) next to the document field.
- 3. Select Upload Document from the menu.
- 4. Click on Browse and select the desired document.
- 5. Enter data used to search for the document later, e.g. the **Document Class**.
- 6. Select an entry in the **Document Group** field to determine who can access the document, e.g. "Sales" or "Management".
- 7. Save the record.

Deleting Documents

To delete a document:

- 1. Select (Master data) > 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 \times (**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.

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

Learn to create mail merges.

Quick campaigns allow you to generate a letter for several persons, without needing to first add a campaign and associated marketing activities etc., see Quick Campaigns on page 516.

You can also create mail merges within the scope of marketing activities, see Marketing Activities on page 521.

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.
- 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.

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.

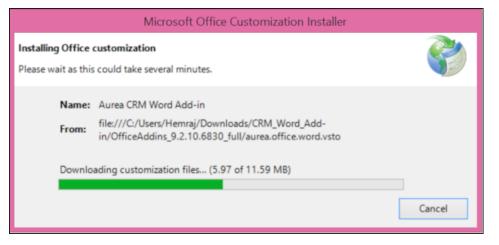
To install the Aurea CRM add-in for Word:

1. Browse to the network shared central location provided by your CRM administrator.

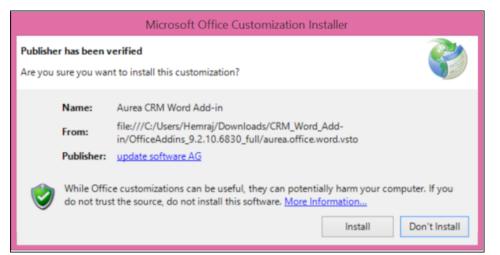
Or

Unzip the package <code>OfficeAddins_<versionNo>_full.zip</code>. The <code><versionNo></code> is the latest version available on the customer support site.

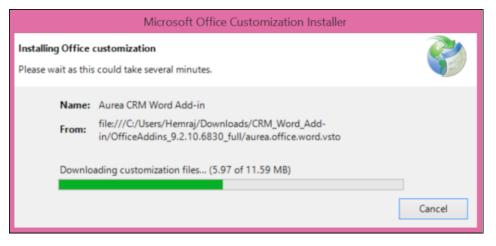
2. Double click aurea.office.word.vsto file in the shared location or the unzipped folder. The Microsoft Office Customization Installer window opens.



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.

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7. To work with the plugin you have to be connected to Aurea CRM. Click **Settings** to open the connection dialog.

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- 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. Select the Use RAS authentication checkbox.
 - b. Click Open RAS Advanced Settings. The following RAS settings dialog

	✓ Use RAS authentication Close RAS advanced settings	
	RAS Url http://localhost/	
displays.	RAS Application Id	

- 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.
- 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 are then happen 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.

Note: 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.

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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**.

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		Aurea Software GmbH Product version: 9. Help link fi	2.0.13361 le:///C:/Users/Hemraj/Documents/A	lurea/2016-Q2/

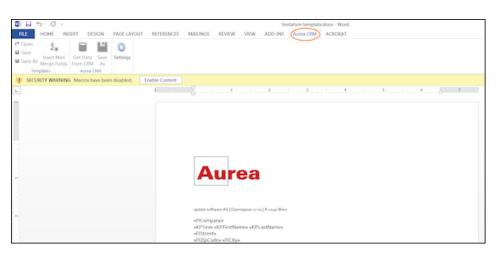
Unzip the package <code>officeAddins_<version no>_release.zip</code>. The <code><version no> is</code> the latest version available on the customer support site. Follow the installation instructions in Installing Aurea CRM Add-in for Microsoft Word.

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.

[] [] [] [] []	Invitation template.docx - Word
FLE HOME INSERT DESIGN PAGE LAYOUT REFER	ENCES MAILINGS REVIEW VIEW ADD-INS Aurea CRM ACROBAT
C Open Save Insert Mail Save As Merger Fields Templers Auras Obu	
SECURITY WARNING Macros have been disabled. Enable Co.	intent
L .	······································
	Aures CIM URL (tép://arm.domo.aures.com//s_m)
	etPicre etFilipNence et etBicete etBicete etCipCodee =RCitya

- 5. Enter the following details in the connection dialog:
 - a. Enter the URL of the update 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 update.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)

Save As		Х
File Name	TemplateInvitation	.docx
Document Class	MailMerge Template	
	Sa	ive

In this case, we save the template document as a MailMerge Template class.

Note: The document class is drawn from the CRM, therefore the drop-down values can be different based on your installation.

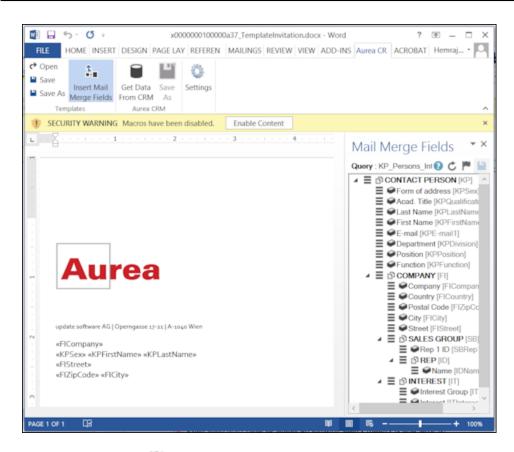
7. Click **Save**. The template document is saved to the D1 infoarea of the Aurea CRM server.

Note:	After a	template	is sa	aved t	to	Aurea	CRM,	the	Insert	Mail	Merge	Fields
menu i	tem is a	activated.									-	

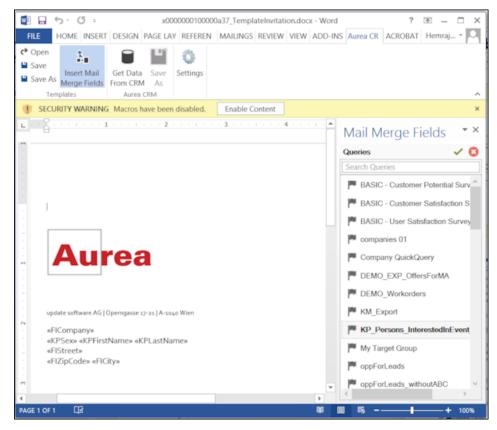
8. Login to the Aurea CRM server with the same username and password and search for the document. The saved document should be visible in the search list as shown in the screenshot below:

Au	Search Doc	uments						Q• Se
⊕■■	Search	Document	s					
		Title						
	D	ocument Class	Add a value	~	Keywa	brd		
		Erfasser		2	Created	on MM/DD/YYYY		~
۱.		Read only	7		Prive	ste ?		
		+	Add more	~	With r	me		
	Max. 15 👻	records per pa	ge					Start Search
PF.	Search Re	esults « «	1 - 15 of 50+ > >>					New 🗐 🗸
э.	1	Title		Document Cl	Keyword	Created by	Created on	Updated on
~		Offer No 1-	2160000049-1 - Open 20160727.pdf			Ben Boss	07/27/2016	07/27/2016
		revenue 201	60715_0621.xml			Simon Seller	07/15/2016	07/15/2016
		Projektliste V	/erkÄnufer.pdf			Beatrice Base	07/13/2016	07/13/2016
	${\bf v}^{\pm}\equiv - {\bf v}$	AureaCRM E	interprise Apr 2016 EN.PDF			Paul Project	07/04/2016	07/04/2016
		Offre No 1-	2160000012-1 - 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 Einlad	lung_Event.docx	Template	update.groupware	SU	06/28/2016	07/13/2016
		QuickCampa	ign_bf784a6b-6677-4ee3-a5bf-7b36f784			Mona Market	06/27/2016	06/27/2016
		Invitation ter	mplate.docx	Mail Merge T	Invitation Templa	su	12/02/2015	12/02/2015
		photo.jpg				Simon Seller	04/02/2015	04/02/2015

9. Click Insert Mail Merge Fields, to update the document with information from the records on Aurea CRM server. The Mail Merge Fields column displays.



10.Click Queries (F) 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.

Queries	10
	· · ·
com	
companies 01	0

b. Right click on the root record node and select Remove.



This creates a blank quey, as shown in the screenshot below.



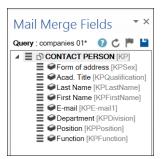
c. Click Add Info Area to open the Select info Area dialog.



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.

Available Fields	Selected Fields	
fun Function 2 Function 3 Function 4 Function 5	Form of address Acad. Title Last Name First Name E-mail Department Position Function	

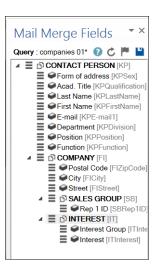
e. Select the required fields in the Available Fields pane and click ► to move it to the Selected Fields pane. Click OK. The selected infoarea and fields are displayed in the Mail Merge Fields.



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.

Relationship Type	Х
Relationship	
Default	\sim
O Interest PLUS Contact Person	^
Interest WITH Contact Person	
O Interest HAVING Contact Person	
O Interest WITHOUT Contact Person	
Interest PLUS SUMMED Contact Person	~
Optional	
Maximum Count	
	Select

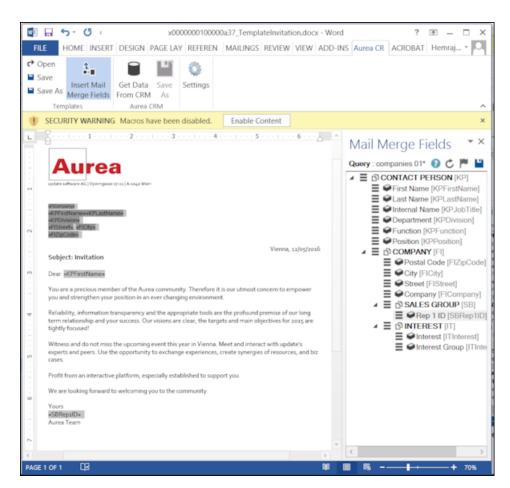
g. Select the required fields from for the new infoarea. The following screenshot shows the **Mail Merge Fields** with the selected info areas and parameters.



h. Click 💾 to save the modified query.

Note: This overwrites the before selected query and the changes are 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.

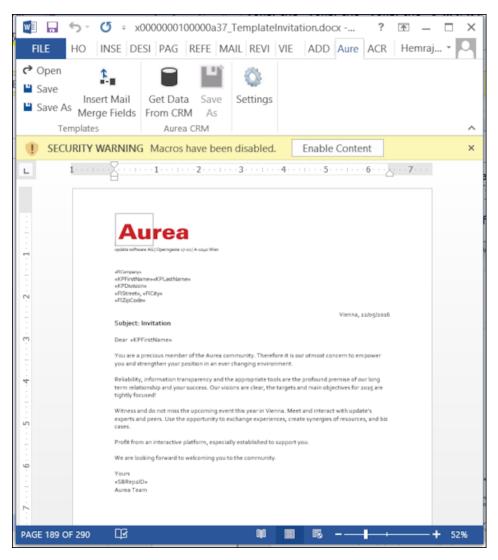
To open an existing template:

- 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.

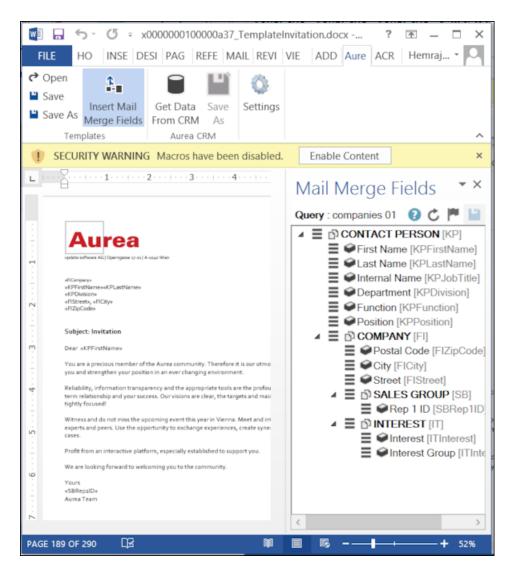
invi		Deserved Olese	Templete (BASE)	
Invi		Document Class	Template (BASE)	*
	Document Name		All MailMarga Tamplata	
	Modele Invitation.doc		MailMerge Template Template (BASE)	
	Plantilla Invitacion.doc		SU	
B	Template Invitation.doc			
B	Template Invitation.doc			
	Template Invitation.docx		SU	
<				>
				-

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.

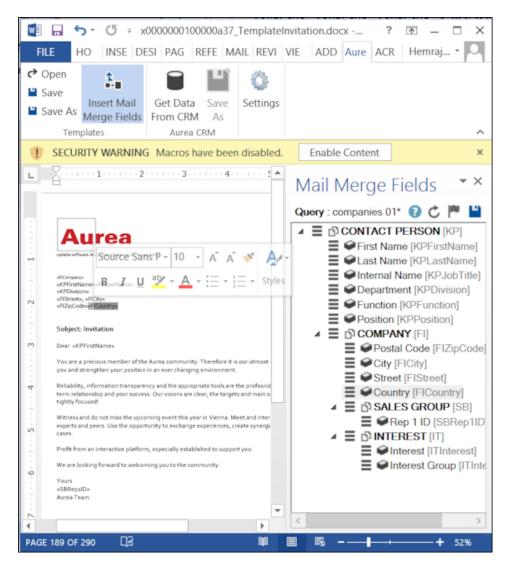
 The selected template document is retrieved from the Server and loaded into Microsoft Word. For example, the screenshot below shows the Template Invitation.docx.



- 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.

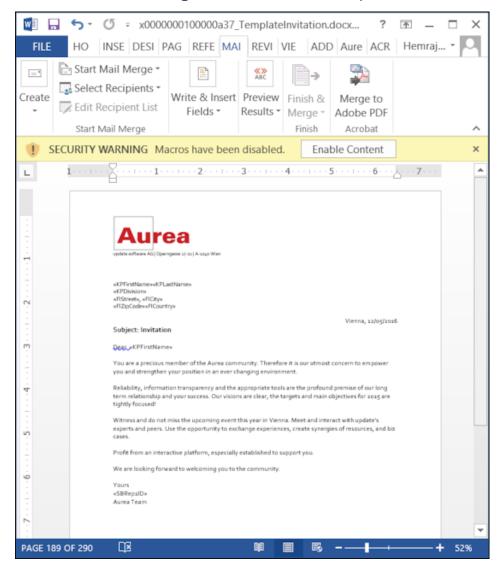
Mail Merge Using Document Templates

To generate a document for several persons using the document template:

- 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.

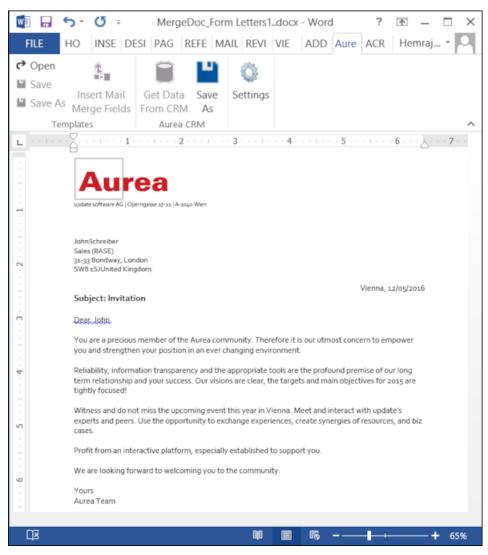
	First Name	Last Name	Internal Name	Department	Department 2	Department 3	Department
v	Ron	Anderson	Managing Director	Sales (BASE)			
	Ron	Anderson	Managing Director	Sales (BASE)			
	Ron	Anderson	Managing Director	Sales (BASE)			
	Ron	Anderson	Managing Director	Sales (BASE)			
✓	Charles	Darwin	Director	Management Board (BASE)			
	Charles	Darwin	Director	Management Board (BASE)			
	Charles	Darwin	Director	Management Board (BASE)			
	Charles	Darwin	Director	Management Board (BASE)			
~	Denise	Paltrow	Program Manager	Marketing (BASE)			
	Denise	Paltrow	Program Manager	Marketina (BASE)			>

3. Click Start Mail Merge. The document is opened is 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.



 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.

Search	Documents					
	Title					
	ocument Class Add a value	Ý	Keywo	rd		
	Erfasser	2	Created	on MM/DD/YYYY		
	Read only ?	_	Priva	te ?		
	+ Add more	~	With r	ne 🗌		
Max. 15 ~	records per page					Start Sea
Search R	esults << < 1 - 15 of 50+ > >>					
Search R	Title	Document Cl.	Keyword	Created by	Created on	Updated
Search R	00010		. Keyword	Created by Ben Boss	Created on 07/27/2016	Updated
Search R	Title		. Keyword			Updated 07/27/20
Search R	Title Offer No 1-2160000049-1 - Open 2010		. Keyword	Ben Boss	07/27/2016	Updated 07/27/20 07/15/20
Search R	Title Offer No 1-2160000049-1 - Open 2010 revenue 20160715 0621.xml	60727.pdf	. Keyword	Ben Boss Simon Seller	07/27/2016 07/15/2016	Updated 07/27/20 07/15/20 07/13/20
2	Title Offer No 1-2160000049-1 - Open 2010 revenue 20160715 0621.xml Proiektliste VerkÄ-ufer.pdf	60727.pdf Æ	. Keyword	Ben Boss Simon Seller Beatrice Base	07/27/2016 07/15/2016 07/13/2016	Updated 07/27/20 07/15/20 07/13/20 07/04/20
2	Title Offer No. 1-2160000049-1 - Open 2010 revenue: 20160715_0621.xml Projektilate VerkÄwufer.pdf AureaCRM Enterprise Apr. 2016; EN.PD	60727.pdf 2E 1160629.pdf	. Keyword	Ben Boss Simon Seller Beatrice Base Paul Project	07/27/2016 07/15/2016 07/13/2016 07/04/2016	Updated 07/27/20 07/15/20 07/13/20 07/04/20 06/29/20
2	Title Offer No. 1-2160000049-1 - Open 2019 revenue. 20160715.0621.xml Projektliste VerkÄwufer.pdf AureaCRM Enterprise Apr. 2016. EN.PD Offre No. 1-2160000012-1 - Otwérz 20	60727.pdf 2E 1160629.pdf	. Keyword update.groupware	Ben Boss Simon Seller Beatrice Base Paul Project Simon Seller Simon Seller	07/27/2016 07/15/2016 07/13/2016 07/04/2016 06/29/2016	Updated 07/27/20 07/15/20 07/13/20 07/04/20 06/29/20 06/29/20
2	Title Offer No. 1-2160000049-1 - Open 2019 revenue. 20160715.0621.xml Projektliste VerkÄwufer.pdf AurzaGRM Enterprise Apr 2016. EN.PD Offre No. 1-2160000012-1 - Otwérz 20 Offre No. 1-2140000273-1 - Otwérz 20	<u>60727.pdf</u> ≝ <u>1160629.pdf</u> <u>1160629.pdf</u> Template		Ben Boss Simon Seller Beatrice Base Paul Project Simon Seller Simon Seller	07/27/2016 07/15/2016 07/13/2016 07/04/2016 06/29/2016 06/29/2016	Updated 07/27/20 07/15/20 07/13/20 07/13/20 06/29/20 06/29/20 07/13/20
2	Title Offer. No. 1-2160000049-1 - Open. 2011 revenue. 20160715.0621.xml Projektilate.Verkå-ufer.pdf AureaCRM. Enterprise. Apr. 2016. EN.PO. Offre. No. 1-216000012-1 - Otwdrz. 20 Offre. No. 1-2140000273-1 - Otwdrz. 20 DEMO. Einladung. Event.docx	50727.edf 1160629.edf 1160629.edf Template 55bf-7b36f786.		Ben Boss Simon Seller Beatrice Base Paul Project Simon Seller SU Nona Market	07/27/2016 07/15/2016 07/13/2016 07/04/2016 06/29/2016 06/29/2016 06/28/2016	New Updated 07/27/20 07/27/20 07/15/20 07/13/20 06/29/20 06/29/20 06/29/20 07/13/20 06/27/20 12/02/20

Deleting a Template Document

You can delete a template document from the CRM server. This deletes the template document along with all linked information in Aurea CRM and the D1 infoarea.

To delete a template document:

- 1. Search for your documents in Aurea CRM using **Colloborate > Documents** menu option.
- 2. Open the required document from the search results.
- 3. Select the **Delete** option from the context menu for the document.

Au	Search Documents		
Ð	Search Documents		
_	Title		
L.	Document Class Add a value	~	Keyword
	Erfasser	2	Created on MM/DD/YYYY
~	Read only 2		Private ?
	+ Add more	~	With me
· 👅 🖏 🛒 📑 🕩 🕀	Max. 15 👻 records per page		
	Search Results << < 1 - 15 of 50+ > >>		
.	🗶 Title	Document Cl Ke	eyword Created by
~	Offer No 1-2160000049-1 - Open 2016	0727.pdf	Ben Boss
	revenue 20160715 0621.xml		Simon Seller
	Projektliste VerkÄ×ufer.pdf		Beatrice Base
	AureaCRM Enterprise Apr 2016 EN.PDF		Paul Project
	Offre No 1-2160000012-1 - Otwórz 201	60629.pdf	Simon Seller
	Offre No 1-2140000273-1 - Otwórz 201	60629.pdf	Simon Seller
	DEMO_Einladung_Event.docx	Template up	odate.groupware SU
	Menu × 7-4ee3-a5	<u>bf-7b36f784</u>	Mona Market
	🛃 📰 Open	Mail Merge T In	vitation Templa SU
	Dpen document		Simon Seller
-	Check Out & Edit		Simon Seller
\mathbf{E}	Notify Rep		Simon Seller
	neset Layout		Simon Seller
T	No. 1		Simon Seller
P	X Delete	Te	st 123 Sunny Sales

Working with Images in the Template Document

You can add images and then modify them in the template document. The following steps show a sample of adding an image to the template document and modifying then making some modifications to the image. You are to use the standard functions available in Microsoft Word to process an image, like resizing and adding borders.

Perform the following steps:

- Create a new blank template document. Perform steps 1 to 11 in the topic, Creating and Saving a New Document Template above. In step eleven you have to create a query that retrieves the fields from the infoarea that has the images you require. For this example steps, we have created a simple query to retrieve the Company infoarea records that has the Logo field containing images of company logos (F1Image), the name of the company (F1Company), and the country (F1Country) it is located in.
- 2. Add the three fields the company name, country, and logo fields to the template document. The Word add-in automatically detects that the added field is an image field and adds the appropriate code, see the screenshot below.

⊟ ⁵	• U	•						ר	000006400000012	2_Demo.d	ocx - Word	Kenith Mclain		-	٥	×
File	Home	Insert	Design	Layout	References	Mailings	Review	View	Aurea CRM	🛛 Те	ll me what you want to do		۶	🖡 Share	P	۲
CP Open Save Save As	Insert Merge F Template	Aail Insert ields Table	Get Data From CRM Aurea	1 As	Settings											^
												Mail Merge	Field	ds	Ŧ	×
												Query : Companies			00	P 🖬
			{ MERC	GEFIELD	FICompany} FICountry] URE "(IF TRUE	" (MERGEFIE	LD Filmage)	"]"* M	ERGEFORMAT	0	I	Z ⊕ COMPA E ⊕ Comp E ⊕ Count E ⊕ Loge	any (FIC	untry]	1	

- **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 from to execute the mail merge and fetch the data and 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.

«FICompan	A.	
«FICountry		
	. ↓	
	Style Crop	
	CMPAN - INVIS	
	there are cut	
XX	Ella Cobh	
	Paste Options:	
	A	
	LA	
	Edit Picture	
	Save as Picture	
	Insert <u>Caption</u>	
	Borders and Shading	
	> Picture	
	byperlink	
	Dew Comment	

- **7.** Add a border using the standard Borders dialog in MS Word.
- 8. Click Frem CMM to execute Mail Merge again.

The resulting document is shown in the screenshot below.

Foxtrot

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 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 a New Document Template* above. In step eleven 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.

85	• • • •														
					Reference	es Mailings			Aurea CRM	V Tell me what you want to a			A Share	. p	۲
C Open Save Save As	Insert M Merge Fir Templates	ail Insert Ids Table	Get Data From CRM Aurea C	As	Ö Settings										^
												Mail Merge	Fields	*	×
						Table Builder	Wizard (S	tep 1/2)			Х	Query : Persons In	Company	001	-
			_		iCompany	0	tha rec sul	t will grou ord or se p-records	up the sub-rec	t will be used as the one ords of a root info area ping field" if no grouping of	Next		try [FICompan try [FICountry]	NY [KP] rstName] stName] try]	

 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.

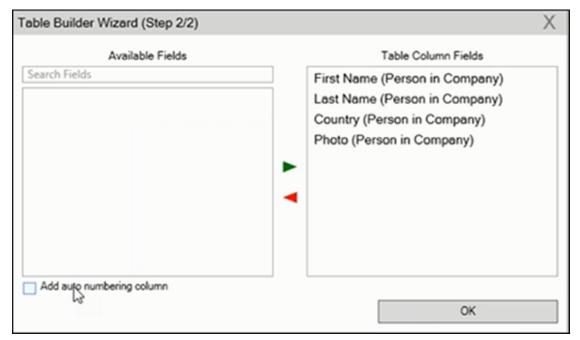
To add a table without grouping fields, perform the following steps:

a. Click Next. The Table Builder Wizard (Step2/2) dialog displays.

Table Builder Wizard (Step 2/2)			Х
Available Fields		Table Column Fields	
Country (Person in Company) First Name (Person in Company) Last Name (Person in Company) Photo (Person in Company)	•		
Add auto numbering column		OK	

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. Select the Add auto numbering column checkbox, 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.

⊟ \$	· 0 ·							×0	000006400000012_	Demo.docx - Word	
File	Home	Insert	Design	Layout	References	Mailings	Review	View	Aurea CRM	Q Tell me what you want to do	
✔ Open Save Save As	Insert Ma Merge Fiel Templates		Get Data Fron CRM Aurea	1 As	Settings						
			SET Cu FirstGi LastRo PL { MER	rrentMer roupRecor otKey }" " EASE DO N	geSeq "{MERG rdMergeSeq + ROW" "HEADE IOT EDIT ABO ICompany}	SESEQ }" } S 1 * MERGE R" }" }	ET Numberi FORMAT }" }	ng"{= 0	urrentMergeSe	eq "{ MERGESEQ }" }" "" }{ q- F { RootKey }= "{	
			MER (Tab	nbering* SEFORMA leRowTyp SEFORMA	T) KPFirstN	FIELD	Last Name (MERGEFIE KPLastNam		Country [MERGEFIELD KPCountry]	Photo (INCLUDEPICTURE "(IF TRUE "(MERGEFIELD KPImage)")"* MERGEFORMAT)	
			SET L	astRootKe	NOTEDIT BELO 29 "{ MERGEFIE 36 GEFORMAT }"	ELD FIComp		E - * ME	RGEFORMAT)	MERGEFIELD FICountry 🖁	

g. Click General to execute the mail merge. The Select Records dialog is displayed.

eiec	t Records						~
•	Company	Country	Logo	First Name	Last Name	Country	Photo
•	Company Super User	Schweiz	C:\\Users\\Konstantinos\\AppData\\L_	Person	Super User		C://Use
•	Contoso	Osterreich	C:\\Users\\Konstantinos\\AppData\\L_	Lucia	Parker	Italien	C://Use
✓	Contoso	Osterreich	C:\\Users\\Konstantinos\\AppData\\L_	Freddie	Lambert	Deutschland	C://Use
✓	Foxtrot	Italien	C:\\Users\\Konstantinos\\AppData\\L_	Kristy	Greene	Deutschland	C://Use
✓	Foxtrot	Italien	C:\\Users\\Konstantinos\\AppData\\L_	Brad	Paul	Osterreich	C://Use
•	Foxtrot	Italien	C:///Users//Konstantinos//AppData//L_	Michelle	Schultz	Deutschland	C://Use
<							>
						Start Mail M	lerg

- h. Select the records you want to add to the result document.
- i. Click Start Mail Merge.
- j. The results documents are created. Sample pages containing the tables for companies are shown below.

Contoso				
Österreich				
	First Name	Last Name	Country	Photo
1	Lucia	Parker I	Italien	2
2	Freddie	Lambert	Deutschland	

Another page:

C Open Save Save As	Insert Mail Merge Fields Templates	Insert Table	Get Data From CRM Aures C	Settings						
				8	Foxtrot Italien	F	fist Name	Last Name	Country	Photo
					1		risty	Greene	Deutschland	S
					2	B	rad	Paul	Österreich	and the
					3	M	tichelle	Schultz	Deutschland	

- **k.** You can add formatting to the table by selecting the table format in the template document and add the required formatting.
- I. To format the table, go to the template document, right click the table and select Table Properties.

bes Labels reate	Start Ma	t Edit ts Recipient List il Merge """ }" "" } IF { Ro SET Current Merg	Merge Fields NotKey } <> "{ reSeq "{MER dMergeSeq+ cow" "HEAD ↓ A [*] A [*] A [*] A [*]	Block I Wr LastRootK GESEQ.)" M 1* MERG ER")") S	etoing Insert Merge Line Field - te & Insert Fields (SET Numbering "(EFORMAT)")(SET	= CurrentMerge	Preview Prind Recipient Results Check for Error. Preview Results	Finish
		X Cuş Sopy C Insert Delete Iable Distribute Row Distribute Colu	s Evenly	e HELD me]	Last Name (MERGEFIELD KPLastName)	Country (MERGEFIE KPCountry)		
	1	Distribute Colu <u>R</u> order Styles <u>AutoFit</u> Tegt Direction Insert <u>Caption</u> Table Propertie New Comment				MERGEFORMAT	T ¥ MERGEFIELD FICountry	l) K

- m.In this example, we are setting the borders to the table. See the screenshot below for the Table properties à Borders and Shading dialog.
- n. Next, 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 KPFirstName }	{ MERGEFIELD KPLastName }	{MERGEFIELD KPCountry}	{ INCLUDEPICTURE "{IF TRUE "{ MERGEFIELD KPImage }" }" * MERGEFORMAT }
{ TableRowType * MERGEFORMAT }				

o. 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.

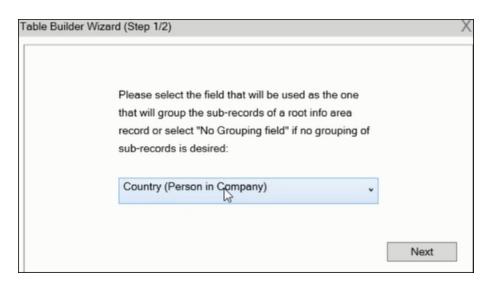
«FICompany»				
«FICountry»				
	First Name	Last Name	Country	Photo
1	«KPFirstName»	«KPLastName»	«KPCountry»	
HEADER				

p. 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.

	First Name	Last Name	Country	Photo
1	Lucia	Parker	Italien	2
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.

Table Builder Wizard (Step 2/2)	Х
Available Fields Search Fields	Table Column Fields
First Name (Person in Company) Last Name (Person in Company) Photo (Person in Company)	
	ОК

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 from the Available

Fields panel, and click for add the records to the Table Column Fields panel. 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.

Insert	Get Data Save	Settings				
Table	From CRM As Aurea CRM					
	IF { MERGESI LastGroupKe """ }" "" } IF "" } SET Curn FirstGroupKe "GROUP_HE PLEASE C { MERGEFIEL	ey }"" { GroupKey rentMergeS ecordMerge ecordMerge ADER" }" 'GROUF ADER" }" }" } OO NOT EDIT D FICompar	SET LastGroupKey "-1" }" ' } <> "{LastGroupKey }" "{ eq "{MERGESEQ}" }{ SET I Seq + 1 * MERGEFORMAT ^_ROW" "{IF{ RootKey } < {SET GroupingField "KPCo ABOVE THIS LINE ty} RGEFIELD FICountry}	SET FirstGroupRecordMe Numbering"{ = CurrentMe }" }{ SET TableRowType " > "{ LastRootKey }" "GROU	rgeSeq "{ MERGESEQ }" }" ergeSeq - (IF { GroupKey } = "{	
	{ MERGEFIEL	D KPCountry	First Name	Last Name	Photo	
	{ Numberin MERGEFOR		{ MERGEFIELD KPFirstName }	{ MERGEFIELD KPLastName }	{INCLUDEPICTURE "{IF TRUE "{ MERGEFIELD KPImage }"}" * MERGEFORMAT }	
	{ TableRow MERGEFOR					
	PLEASE D	ONOTEDIT	BELOW THIS LINE			
	•		RGEFIELD FICompany X QU		MERGEFIELD FICountry X	

- e. Click free to execute the mail merge. The **Select Records** dialog displays with a list of available records. Click the checkbox to add a record to the result document. See the screenshot below.

elec	t Records						B
2	Company	Country	Logo	First Name	Last Name	Country	Photo
1	Company Super User	Schweiz	C:IlUsersIlKonstantinosIlAppDataIIL.	Person	Super User		C:IUM
2	Contoso	Osterreich	CillUsersilKonstantinosilAppDataliL	Lucia	Parker	Italien	C:IUse
7	Contoso	Osterreich	C1IUsersIlKonstantinosIlAppDataIIL	Freddie	Lambert	Deutschland	C:lUs
•	Faxtrot	Italien	C://Users//Konstantinos//AppData//L_	Kristy	Greene	Deutschland	C:IIUse
2	Foxtrot	Italien	C:1IUsers1iKonstantinos1iAppData1iL	Brad	Paul	Osterreich	C:IUM
2	Featrot	Italien	C:1/Users//Konstantinos/IAppData//L.	Michelle	Schultz	Deutschland	C:IUs
¢							
						Start Mail M	lerge

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.

Contoso Company Country	:: Österreich			
Deutschland	First Name	Last Name	Photo	
1	Freddie	Lambert		
Italien	First Name	Last Name	Photo	
1	Lucia	Parker		

6. Click Save As to save the template document. The Save As dialog displays.

Save As		Х
File Name	Demo_2016-12-21_SU	.docx
Document Class	v]
	S	ave

A default name in the following format is automatically displayed, <document-Name>_<date>_<user name>.docx. In the screenshot above the default name is Demo_2016-12-21_SU.docx.

7. Click **Save**. The template document is saved to the D1 infoarea of the Aurea CRM server.

Using Aurea CRM Addin for Microsoft Word

Aurea CRM addin 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 <code>OfficeAddins_<versionNo>_full.zip</code>. The <code><versionNo></code> 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.

-	Installing Office customization Please wait as this could take several minutes.					
Name: From:	Aurea CRM Word Add-in file:///C:/Users/Hemraj/Downloads/CRM_Word_Add- in/OfficeAddins_9.2.10.6830_full/aurea.office.word.vsto					
Downlo	ading customization files (5.97 of 11.59 MB)	Cancel				

The installer verifies the publisher, in this case Aurea CRM, and then displays the following window.

Microsoft Office Customization Installer						
Publisher has been verified Image: Comparison of the second sec						
	Name:	Aurea CRM Word Add-in				
From: file:///C:/Users/Hemraj/Downloads/CRM_Word_Add- in/OfficeAddins_9.2.10.6830_full/aurea.office.word.vsto						
	Publisher:	update software AG				
٧		e customizations can be useful, they can potentially harm your computer. If you at the source, do not install this software. <u>More Information</u> Install Don't Install				

3. Click Install. The Installing Office Customization message displays.

	Microsoft Office Customization Installer						
Installing Office of Please wait as this	c ustomization could take several minutes.	Ś					
Name: From:	Aurea CRM Word Add-in file:///C:/Users/Hemraj/Downloads/CRM_Word_Add- in/OfficeAddins_9.2.10.6830_full/aurea.office.word.vsto						
Downlo	ading customization files (5.97 of 11.59 MB)	Cancel					

- 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.

🗊 🖬 S- O -	Document1 - Word	?	* –	\Box ×
FILE HOME INSERT DESIGN PAGE LAYO REFERENCE	E MAILINGS REVIEW VIEW ADD-INS Aurea CRM	ACROBAT	Hemraj.	. - D
C Open Save Save As Templates Save CRM S Open Get Data Save From CRM As Aurea CRM				^
Navigation • •				3 · ·
Search document 🔎 -				
HEADINGS PAGES RESULTS				
Create an interactive outline of your document.				
It's a great way to keep track of where you are or quickly move your content around.				
To get started, go to the Home tab and apply Heading styles to the headings in your document.	-			
PAGE 1 OF 1 C	10 m 05		+	120%

7. To work with the plugin you have to be connected to Aurea CRM. Click **Settings** to open the connection dialog.

🗊 🖬 🕤 · ೮ =	Document1 - Word	? 🗈 🗕 🗆 🗙
FILE HOME INSERT DESIGN PAGE L	AYO REFERENCE MAILINGS REVIEW VIEW ADD-INS Aure	ea CRM ACROBAT Hemraj
C Open Save Save As Merge Fields Templates Templates	Settings	~
Navigation	Aurea CRM URL http://172.30.74.151/CRM_ISI	2
Search document HEADINGS PAGES RESULTS	Username Password	
Create an interactive outline of your docur	CRM Language English ~	
It's a great way to keep track of where you move your content around.	Log In Cancel	
To get started, go to the Home tab and app styles to the headings in your document.	Ny Heading	
PAGE 1 OF 1	· · · · · · · · · · · · · · · · · · ·	IIG + 120%

- 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. Select the Use RAS authentication checkbox.
 - b. Click Open RAS Advanced Settings. The following RAS settings dialog displays.

✓ Use RAS authentication	Close RAS advanced settings
RAS Url http://localhost/	
RAS Application Id	

- 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.
- 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 are then happen 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.

Note: You may have to login to the shared network location to ensure that it is accessible to the ClickOnce installer to check for a new version of the CRM Add-in and perform the upgrade.

If you have used a network shared central location to install CRM Add-in for word, your upgrade should start automatically. If a new version is published to the shared location, on starting MS Word, ClickOnce installer will check the shared folder for a newer version and if a new version is available, it automatically starts the update process.

Bit Internet Description Internet Advantable Advant	1 - 5 - 0 -
Description A A A A A A A A A A A A A A A A A A A	FLE HOME INSERT DESIGN PAGE LAYOUT IN
Native State	the officery B J U + in X, X ¹ A + Z +
Instants Account D Instants In	Navigation + x
HALEMAN PAGES RESULTS	
Microsoft Office Customization Installer Space customization Space customization Person wat is thin United Add in Installer Name: Aussi CMM Word Add in Aussi CMM Word Add in Installer Brane: Installer CMM Word Add in Space CMM Word Add in Installer Brane: Installer CMM Word Add in Space CMM Word Add in Installer	
Updating Offse castinulation Image: Preserved monotory Preserve west on this candid label provided monotory Image: Annotory Control (Annotory Control (Annoto	
Updating Offse castinulation Image: Preserved monotory Preserve west on this candid label provided monotory Image: Annotory Control (Annotory Control (Annoto	
Preser well as this could like several minutes. Name: Avers CMM Word Add in - Avers CMM Word Add in Figure: Int(C,C)any Nenry (Download) COM (Nord Add - in Figure: Int(C,C)any Nenry (Download) COM (Nord Add - in	
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in/thereof/surves.office.execd.edu	
Downloading customization Nex. (122 of 11.00 MB)	
Canot	

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**.

Ş		Control Panel\Programs\Programs and Featur	es 🗕 🗖 🗙
۲) 🕘 🔹 🕆 🔞 🕨 Control Pa	nel	✓ C Search Programs and Features <i>P</i>
	Control Panel Home View installed updates Turn Windows features on or	Uninstall or change a program To uninstall a program, select it from the list and then click U	ninstall, Change, or Repair.
Ľ	off	Organize - Uninstall	III • 😡
		Name	Publisher
		Adobe Acrobat XI Standard	Adobe Systems
		Agent Ransack x64	Mythicsoft Ltd
		AOMEI Backupper Standard	AOMEI Technology Co., Ltd.
		Arduino	Arduino LLC
		Atom	GitHub Inc.
		✓ ■ Aurea CRM Word Add-in	Aurea Software GmbH
		in calibre	Kovid Goyal 🗸
		<	>
		Aurea Software GmbH Product version: 9.2.0.1 Help link file;//	3361 C:/Users/Hemraj/Documents/Aurea/2016-Q2/

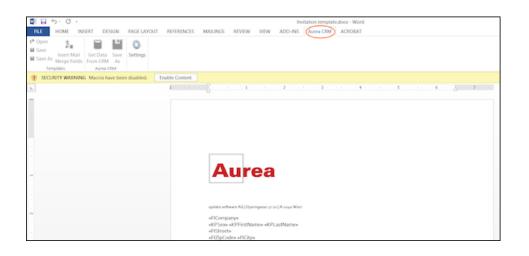
Unzip the package <code>OfficeAddins_<version no>_release.zip</code>. The <version no> will be the latest version available on the customer support site. Follow the installation instructions in Installing Aurea CRM Add-in for Microsoft Word.

Creating and Saving new Document Template

You can create document templates for documents that you regularly use for recurring tasks.

To create a new document template:

- 1. Open a Microsoft Word document containing basic text.
- 2. Edit the content of the document.
- 3. Click on the Aurea CRM menu item.



4. Click **Settings** to open the connection dialog.

🗐 🖬 5·0 -	Invitation template.docx - Word
FILE HOME INSERT DESIGN PAGE LAW	OUT REFERENCES MAILINGS REVIEW VIEW ADD-INS Aurea CRM ACROBAT
C* Open Save As Meeror Hall Save As Meeror Telds From OBM As Templates Aurea CBM	
SECURITY WARNING Macros have been disabled.	Enable Content
L	1 · · · · · · · · · · · · · · · · · · ·
	Auros CIM LEE: teg:/crm.domo.auros.com/or_m/ equitar software A6 (c)puengare el Scoregary el Storegary el Storegary el Storegary el Storegary

- 5. Enter the following details in the connection dialog:
 - a. Enter the URL of the update 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 update.CRM sub-menu items are activated until you login.

AUREA CONFIDENTIAL

- 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)

Save As		Х
File Name	TemplateInvitation	docx
Document Class	MailMerge Template	
	Save	3

In this case, we save the template document as a MailMerge Template class.

Note: The document class is drawn from the CRM, therefore the drop-down values can be different based on your installation.

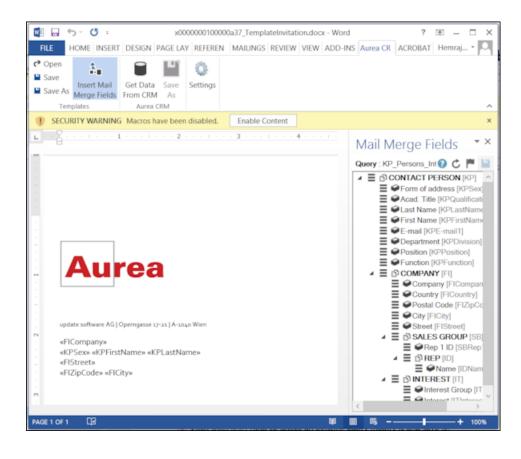
7. Click **Save**. The template document is saved to the D1 infoarea of the Aurea CRM server.

Note: After a template is saved to Aurea CRM, the **Insert Mail Merge Fields** menu item is activated.

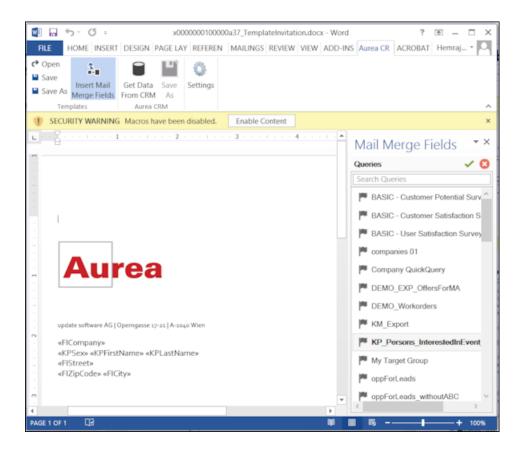
8. Login to the Aurea CRM server with the same username and password and search for the document. The saved document should be visible in the search list as shown in the screenshot below:

Au	Search Doc	uments						Q• Ser
$\overline{lackslash}$	_							
	Search	Document	s					
-		Title						
alada	D	ocument Class	Add a value	~	Keywa	ord		
		Erfasser		2	Created	on MM/DD/YYYY		~
_		Read only				ate ?		
		+	Add more	Ŷ	With r	me		
	Max. 15 👻	records per pa	ge					Start Search
100								
	Search R	esults « «	1 - 15 of 50+ > >>					🕀 New 🕅 🗸
э.	1	Title		Document Cl	Keyword	Created by	Created on	Updated on
~		Offer No 1-	2160000049-1 - Open 20160727.pdf			Ben Boss	07/27/2016	07/27/2016
		revenue 20	160715_0621.xml			Simon Seller	07/15/2016	07/15/2016
		Projektliste	VerkÄ×ufer.pdf			Beatrice Base	07/13/2016	07/13/2016
	$\mathbf{r}_{\mathrm{B}}\equiv~\sim$	AureaCRM	Enterprise Apr 2016 EN.PDF			Paul Project	07/04/2016	07/04/2016
		Offre No 1-	2160000012-1 - 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_Einla	dung_Event.docx	Template	update.groupware	SU	06/28/2016	07/13/2016
		QuickCampa	ign_bf784a6b-6677-4ee3-a5bf-7b36f784_			Mona Market	06/27/2016	06/27/2016
		Invitation te	mplate.docx	Mail Merge T	Invitation Templa	SU	12/02/2015	12/02/2015
		photo.jpg				Simon Seller	04/02/2015	04/02/2015

9. Click Insert Mail Merge Fields, to update the document with information from the records on Aurea CRM server. The Mail Merge Fields column displays.



10.Click Queries (P) 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.

Mail Merge Fields	~ ×
Queries	Solution (1998)
com	
companies 01	Ô

b. Right click on the root record node and select **Remove**.



This creates a blank quey, as shown in the screenshot below.



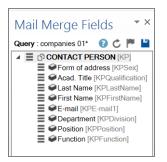
c. Click Add Info Area to open the Select info Area dialog.



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.



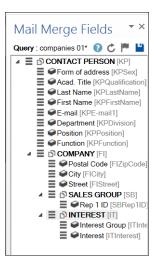
e. Select the required fields in the Available Fields pane and click **>** to move it to the Selected Fields pane. Click OK. The selected infoarea and fields are displayed in the Mail Merge Fields.



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.

Relationship Type	Х
Relationship	
Default	V
O Interest PLUS Contact Person	^
Interest WITH Contact Person	
O Interest HAVING Contact Person	
O Interest WITHOUT Contact Person	
Interest PLUS SUMMED Contact Person	~
Optional	
Maximum Count	
	Select

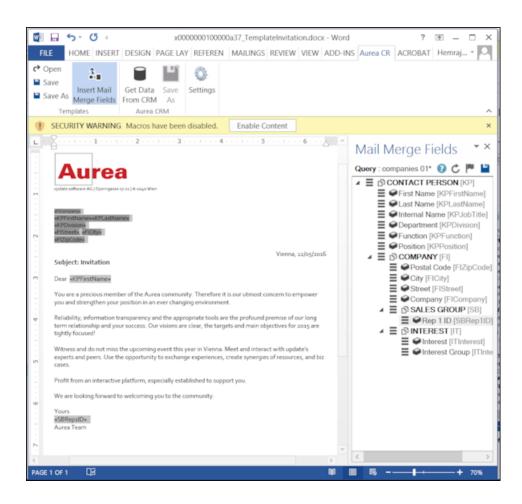
g. Select the required fields from for the new infoarea. The following screenshot shows the **Mail Merge Fields** with the selected info areas and parameters.



h. Click 💾 to save the modified query.

Note: This overwrites the before selected query and the changes are done in the CRM solution. Please ensure that the query can be modified to your requirements to avoid conflicts with queries set up by other users.

12.To populate the template document with the fields from infoarea records, drag and drop the fields in the required places. The following screenshot shows the template document enriched with fields.



13.Click **Save**. The template document will be saved to the D1 infoarea on Aurea CRM server.

Opening and Editing document templates

You can open an existing template and edit and save it. You can also rename it and save it with a different template name.

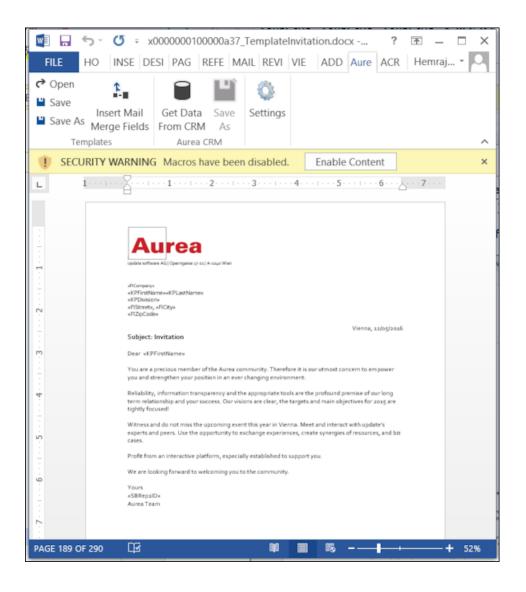
To open an existing template:

- 1. In the Microsoft Word, click on the Aurea CRM menu item.
- 2. Click Settings, and login to the Aurea CRM server.
- 3. Click Open. The Documents dialog is displayed.

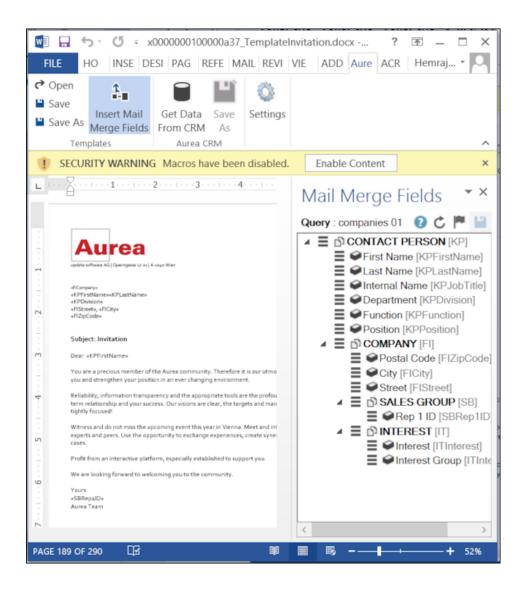
nvi		Document Class	Template (BASE)	
		Document Class	All	
	Document Name		MailMerge Template	
B	Modele Invitation.doc		Template (BASE)	
	Plantilla Invitacion.doc		SU	
	Template Invitation.doc			
	Template Invitation.doc			
	Template Invitation.docx		SU	
<				>

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.

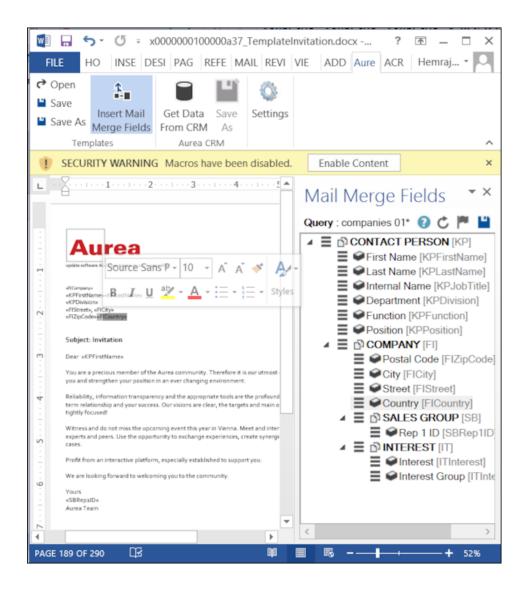
4. The selected template document is retrieved from the Server and loaded into Microsoft Word. For example, the screenshot below shows the **Template Invitation.docx**.



- 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.

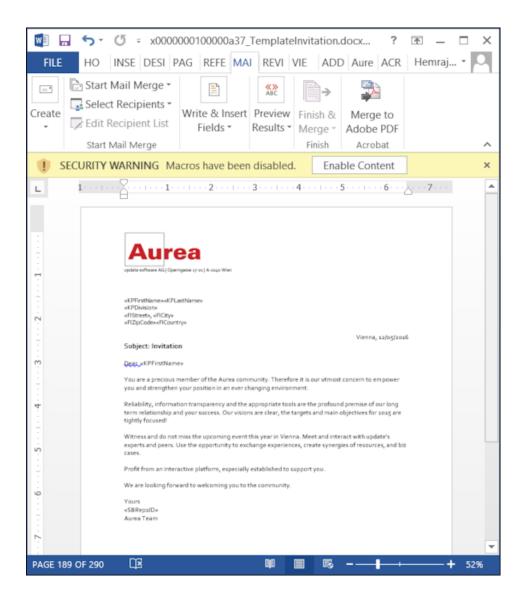
Mail Merge Using Document Templates

To generate a document for several persons using the document template:

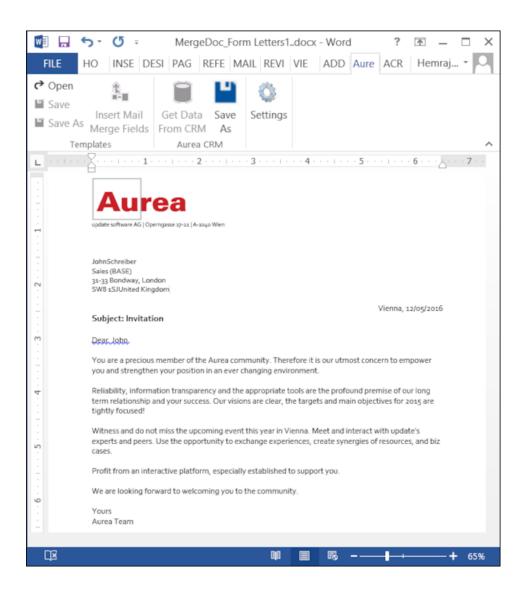
- 1. From the Aurea CRM menu, login to the CRM server and open the Mail Merge template document. Edit the template document if necessary. For more information, see >> Opening and Editing document templates.
- 2. Click **Get Data From CRM**. The Select Records dialog displays single record or a list of records, showing the data fields you selected. You can then select the data you want use with the document template.

	First Name	Last Name	Internal Name	Department	Department 2	Department 3	Department
v	Ron	Anderson	Managing Director	Sales (BASE)			
	Ron	Anderson	Managing Director	Sales (BASE)			
	Ron	Anderson	Managing Director	Sales (BASE)			
	Ron	Anderson	Managing Director	Sales (BASE)			
✓	Charles	Darwin	Director	Management Board (BASE)			
	Charles	Darwin	Director	Management Board (BASE)			
	Charles	Darwin	Director	Management Board (BASE)			
	Charles	Darwin	Director	Management Board (BASE)			
√	Denise	Paltrow	Program Manager	Marketing (BASE)			
	Denise	Paltrow	Program Manager	Marketina (BASE)			

3. Click Start Mail Merge. The document is opened is 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.

Searc	h Documents					
	Title					
	Document Class Add a value	Ý	Keywi	ord		
	Erfasser	2	Created	on MM/DD/YYYY		
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1	Tisle Offer: No. 1-2160000049-1 - Open. 20160727.pdf revenue. 20160715.0621.xml Projektliste Verkävifer.pdf AureaCRM. Enterprise. Apr. 2016. EN.PDE Offer. No. 1-2160000012-1 - Otwórz. 20160629.p Offre. No. 1-2140000273-1 - Otwórz. 20160629.p DEMO. Einladung. Event.docx	f odf Stemplate f784		Ben Boss Simon Seller Beatrice Base Paul Project Simon Seller Sil SU Mona Market	07/27/2016 07/15/2016 07/13/2016 07/04/2016 06/29/2016 06/29/2016 06/28/2016	 New Updated 07/27/20 07/15/20 07/13/20 07/04/20 06/29/20 06/29/20 07/13/20 06/27/20 12/02/20

Deleting a Template Document

You can delete a template document from the CRM server. This deletes the template document along with all linked information in Aurea CRM and the D1 infoarea.

To delete a template document:

- 1. Search for your documents in Aurea CRM using **Colloborate > Documents** menu option.
- 2. Open the required document from the search results.
- 3. Select the **Delete** option from the context menu for the document.

Au	Search Documents			
⊕•¶ 1	Search Documents			
-	Title			
	Document Class Add a value	~	Keywo	ord
	Erfasser	91	Created	on MM/DD/YYYY
~	Read only ?		Priva	ite ?
	+ Add more	~	With r	ne
): 🗶 🗶	Max. 15 👻 records per page			
	Search Results « < 1 - 15 of 50+ > »			
э.	🖉 Title	Document Cl	Keyword	Created by
~	Offer No 1-2160000049-1 - Open 20160727.pdf			Ben Boss
	revenue 20160715 0621.xml			Simon Seller
	Projektliste VerkÄ×ufer.pdf			Beatrice Base
	AureaCRM Enterprise Apr 2016 EN.PDF			Paul Project
	Offre No 1-2160000012-1 - Otwórz 20160629.pdf			Simon Seller
	Offre No 1-2140000273-1 - Otwórz 20160629.pdf			Simon Seller
	DEMO Einladung Event.docx	Template	update.groupware	SU
	■ Menu × <u>7-4ee3-a5bf-7b36f784</u>			Mona Market
	🛃 🗮 🖿 Open	Mail Merge T	Invitation Templa	SU
	Dpen document			Simon Seller
	Check Out & Edit			Simon Seller
\mathbf{E}	Notify Rep			Simon Seller
	n Reset Layout			Simon Seller
T	N a lu			Simon Seller
P	× Delete		Test 123	Sunny Sales

Working with Images in the Template Document

You can add images and then modify them in the template document. The following steps show a sample of adding an image to the template document and modifying then making some modifications to the image. You will be using the standard functions available in Microsoft Word to process an image, like resizing and adding borders.

Perform the following steps:

- Create a new blank template document. Perform steps 1 to 11 in the topic, Creating and Saving a New Document Template above. In step eleven you have to create a query that will retrieve the fields from the infoarea that has the images you require. For this example steps, we have created a simple query to retrieve the Company infoarea records that has the Logo field containing images of company logos (F1Image), the name of the company (F1Company), and the country (F1Country) it is located in.
- 2. Add the three fields the company name, country, and logo fields to the template document. The Word add-in automatically detects that the added field is an image field and adds the appropriate code, see the screenshot below.

×

- **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 I to execute the mail merge and fetch the data and 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 will contain two pages for the two companies and all the employees of a company grouped in a single page.

The sample table created in the procedure described below uses a query to retrieve a company along with the employees of the company. Perform the following steps:

- Create a new blank template document. Perform steps 1 to 11 in the topic, Creating and Saving a New Document Template above. In step eleven you have to create a query that will retrieve the fields from the infoarea that has the information that you want to tabulate. For this example steps, we have created a complex query to retrieve the Company infoarea records along with its employee information.
- 2. From the **Mail Merge Fields** add the Company name and the Country fields to the template document.
- 3. Click Insert Table.

The Table Builder Wizard (Step1/2) dialog displays. See the screenshot below.

×

4. You can add tables to the template document based on a grouping field or without a grouping field. A grouping field groups the sub-records of a selected parent record.

To add a table based on a grouping field, go to step 5.

To add a table without grouping fields, perform the following steps:

a. Click Next. The Table Builder Wizard (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. Select the Add auto numbering column checkbox, 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 I to execute the mail merge. The **Select Records** dialog is displayed.

×

- h. Select the records you want to add to the result document.
- i. Click Start Mail Merge.
- j. The results documents are created. Sample pages containing the tables for companies are shown below.

×

Another page:

×

- **k.** You can add formatting to the table by selecting the table format in the template document and add the required formatting.
- I. To format the table, go to the template document, right click the table and select Table Properties.

×

- m.In this example, we will set the borders to the table. See the screenshot below for the Table properties à Borders and Shading dialog.
- n. Next, we apply a simple formatting to the table. All borders to the table grid. See the screenshot below.

×

o. 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.

×

p. 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. ×

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: 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 from the Available

Fields panel, and click to add the records to the **Table Column Fields** panel. 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 I to execute the mail merge. The **Select Records** dialog displays with a list of available records. Click the checkbox to add a record to the result document. 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.

Contoso Company Country	r: Österreich			
Deutschland	First Name	Last Name	Photo	
1	Freddie	Lambert	CIT	
Italien	First Name	Last Name	Photo	
1	Lucia	Parker		

6. Click Save As to save the template document. The Save As dialog displays.

Save As			Х
File Name	Demo_2016-12-21_SU		.docx
Document Class		۷	
		Sa	ive

A default name in the following format is automatically displayed, <document-Name>_<date>_<user name>.docx. In the screenshot above the default name is Demo_2016-12-21_SU.docx.

7. Click **Save**. The template document is saved to the D1 infoarea of the Aurea CRM server.

6

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.
- Automatically transfer item details to other info areas (e.g. offer items).
- Classify items by item type, brand, product and product type.
- Define various price lists in various currencies that are used to automatically price items when adding orders and POS material, see Price Lists and Pricing on page 421.
- Define bulk discounts (at the order and item level), fixed prices and discounts in kind for customer groups, items and/or special offer bundles, see Sample Management – LSI on page 490 and Sample Configuration on page 492.
- Group multiple items in bundles, see Item Bundles on page 411.

Note: Items in the item master and price lists can only be added by users with appropriate access rights.

Item Master

E IND 10mg							
= 💉 🗸 📀 😒	×						
 Overview 							
Item No.	1944						
Item name	IND 10mg						
Item short na		Sort Order					
Item type	Sample	Indication gro	Indication Group 1				
Brand	Brand 1	Registration t	Registration type 1				
Product	Product 1	Bundle	×				
Leaflet							
✓ Details							
				Manufacturer			
EAN-No.		Units per Indu					
National drug		Packaging Unit		Distributor			
Price Factor	1,00						
 Quick Add 							
Order standard	~	POS Monitorin	×	POS Material	1		
Order prio	~	POS Monitorin	×	POS Material	1		
Stock Control	×	Listing Item	\checkmark	Competition	~		

The Item Master info area stores basic information about individual items.

Select (Master data) > Item Master.

Item data plays an important role in other info areas:

- For example, you can define discounts for item types or indication groups, which then apply to all items of that type or that belong to that indication group.
- You can define any number of price lists for each item, see Price Lists on page 410.

The following info areas access the item master:

- Special Offer Item
- Order Item
- Condition
- Listings
- POS Monitoring Item
- Product Detailing Definition Item
- POS Material Item

Click on **Q** (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 etc.).

Price Lists

Any number of price lists can be defined per item. The prices for orders (and POST materials) are automatically calculated based on the price lists.

≡ I I V Ø X • Overview *	
Overview *	
Item No. 1844 Item name IND 10mg	
ICurrency EUR Valid from 27.03.2013 Valid to 30.10.2013	Ŷ
Customer Gro	
Country Austria	
Price list 🔪	
✓ Prices	
Price 10,00 Price (retail)	
Factory Price 2 Factory Price 3	
✓ Text	
Comment	

There are three types of price lists:

- Individual price lists (**Price list** field): A price list for an individual account. The price list can be selected in orders.
- Customer group price lists (Customer Group field): A price list for a group of accounts.
- Country-specific price lists (**Country** field): Price list for a country.

In each price list, **only one** of these three fields may contain data. When pricing items, individual price lists take precedence. 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 421.

Note: Price lists are added for items in the **Item Master** info area from the search. Price lists are only valid for orders (and POS materials) in the same currency as the price list. Currencies cannot be converted.

Time Limitations for Price Lists

Define the time period the price list is valid for in the **Valid from** and **Valid to** fields. For example, you can add new price lists for an item for various countries each year, without needing to delete the old price lists. These time periods may not overlap one another for the same item, country and currency (i.e. only one price list can be valid for at any time).

If you add a new price list, whose time period overlaps the time period entered for an existing price list, a message is displayed.

Defining the Structure of Price Lists

Add a price list in the local currency for every country and item. This price list is then used for orders if no individual or customer group price lists apply.

You only need to add individual and customer group price lists if prices for individual accounts or groups of accounts differ from the standard prices (i.e. the country prices).

Use customer group price lists if you want to define a price list for a group of customers, especially if you want define conditions (discounts) for this group, see Defining Conditions on page 110.

Use individual price lists to define specific price lists for accounts that are part of a customer group, but to which prices that differ from the group's prices apply.

Individual price lists must be entered in orders, i.e. you can choose whether an individual price list should be used when adding an offer or order.

Item Bundles

You can group items in bundles (e.g. starter packs, showcase items etc.).

Bundles are added as items in the item master; you can add bundle items to any of the items in the item master, see Item Master on page 409.

Select (Master Data) > New Item. Enter the relevant data.

To add items to the bundle:

- Select the desired entry in the item master and click on ⊕ (New) on the Bundle Items tab.
- Click on Q (Select) next to the Item No. field to select an item. The Item Name is entered automatically.
- 3. Enter a Quantity.

Note: Once you have added a bundle item to an entry in the item master, the **Bundle** field is enabled in the item record corresponding to the bundle (the parent record).

Item Master

IND 10mg					
= 🖉 🗸 ⊘ 🕽	×				
• Overview					
Item No.	1844				
Item name	IND 10mg				
Item short na		Sort Order			
Item type	Sample	Indication gro	Indication Group 1		
Brand	Brand 1	Registration t	Registration type 1		
Product	Product 1	Bundle	×		
Leaflet					
✓ Details					
EAN-No.		Units per Indu		Manufacturer	
National drug		Packaging Unit		Distributor	
Price Factor	1,00				
 Quick Add 					
Order standard	~	POS Monitorin	×	POS Material	~
Order prio	~	POS Monitorin	×	POS Material	~
Stock Control	×	Listing Item	×	Competition	\$

The Item Master info area stores basic information about individual items.

Select (Master data) > Item Master.

Item data plays an important role in other info areas:

- For example, you can define discounts for item types or indication groups, which then apply to all items of that type or that belong to that indication group.
- You can define any number of price lists for each item, see Price Lists on page 410.

The following info areas access the item master:

- Special Offer Item
- Order Item
- Condition
- Listings
- POS Monitoring Item

- Product Detailing Definition Item
- POS Material Item

Click on **Q** (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 etc.).

Price Lists

Any number of price lists can be defined per item. The prices for orders (and POST materials) are automatically calculated based on the price lists.

Pricelist EUR								
$\equiv \swarrow \checkmark \otimes \times$								
• Overview *								
Item No.	1844	Item name	IND 10mg					
(Currency	EUR Y	Valid from	27.03.2013	Valid to	30.10.2013 ~			
Customer Gro	~							
Country	Austria 🗸 🗸							
Price list	~							
· Prices								
Price	10,00	Price (retail)						
Factory Price 1		Factory Price 2		Factory Price 3				
• Text								
Comment								
Comment								

There are three types of price lists:

- Individual price lists (**Price list** field): A price list for an individual account. The price list can be selected in orders.
- Customer group price lists (**Customer Group** field): A price list for a group of accounts.
- Country-specific price lists (Country field): Price list for a country.

In each price list, **only one** of these three fields may contain data. When pricing items, individual price lists take precedence. 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 421.

Note: Price lists are added for items in the **Item Master** info area from the search. Price lists are only valid for orders (and POS materials) in the same currency as the price list. Currencies cannot be converted.

Time Limitations for Price Lists

Define the time period the price list is valid for in the **Valid from** and **Valid to** fields. For example, you can add new price lists for an item for various countries each year, without needing to delete the old price lists. These time periods may not overlap one another for the same item, country and currency (i.e. only one price list can be valid for at any time).

If you add a new price list, whose time period overlaps the time period entered for an existing price list, a message is displayed.

Defining the Structure of Price Lists

Add a price list in the local currency for every country and item. This price list is then used for orders if no individual or customer group price lists apply.

You only need to add individual and customer group price lists if prices for individual accounts or groups of accounts differ from the standard prices (i.e. the country prices).

Use customer group price lists if you want to define a price list for a group of customers, especially if you want define conditions (discounts) for this group, >> Defining Conditions on page 110.

Use individual price lists to define specific price lists for accounts that are part of a customer group, but to which prices that differ from the group's prices apply.

Individual price lists must be entered in orders, i.e. you can choose whether an individual price list should be used when adding an offer or order.

Item Bundles

You can group items in bundles (e.g. starter packs, showcase items etc.).

Bundles are added as items in the item master; you can add bundle items to any of the items in the item master, >> Item Master on page 409.

Select (Master Data) > New Item. Enter the relevant data.

To add items to the bundle:

- Select the desired entry in the item master and click on ⊕ (New) on the Bundle Items tab.
- 2. Click on Q (Select) next to the Item No. field to select an item. The Item Name is entered automatically.
- 3. Enter a **Quantity**.

Note: Once you have added a bundle item to an entry in the item master, the **Bundle** field is enabled in the item record corresponding to the bundle (the parent record).

7

Order Management

Learn about order management in Aurea CRM.

If the customer places an order, you can store the order in Aurea CRM.

Orders are managed as part of the call documentation process, >> Call Documentation on page 205. New orders are added within the scope of customer calls.

You can:

- Add orders, see Adding Orders on page 417.
- Add items to orders, see Adding Items to Orders on page 416.
- Enter order deliveries, see Order Deliveries on page 420.
- View order delivery items, see Order Deliveries on page 420.
- Calculate prices for individual order items, see Pricing on page 421.

Select **E**(**Reference book**) > **Orders** to display an overview of all your orders.

Adding Items to Orders

Individual items are added to orders using order item records.

To add an order item:

- 1. Switch to the desired order (Orders) node in the tree view of an account.
- 2. Click on \oplus (Quick Add) on the Order Items tab. The Currency is transferred from the order and cannot be edited.
- 3. Enter data such as the **Quantity** and any discount. The **Value** is calculated automatically.

If suitable price lists are present, the **Price** in the price list is transferred to the item, see **Price Lists** on page 410 and **Pricing** on page 421.

You can manually change the **Price**.

Note: The **Price** entered in the price list (if present) is only displayed in the quick add area once the item has been saved. Apply the **Special Offer** filter to only display items for which a special offer is currently valid. If a **Special Offer** has been entered in the order, only special offer items added for the special offer are listed. You cannot add other items to the order. Apply the **Sales Organization** filter to only display those items that have been assigned to a sales organization.

4. Click **Save**. The order item's serial number is entered automatically.

Note: If you have already entered items in an order, you can no longer edit the **Rep** and **Stock** fields in the order record. For further information on calculating the value of order items, contact your administrator.

Adding Orders

Orders consist of a "header record" that contains data relating to the entire order (e.g. order number, currency), and item records that contain data concerning the individual items in the order.

Orders are added for accounts.

Note the following when adding orders:

- If you commonly add orders in various currencies, decide on the currency to be used by the order. Once the order has been saved, you can **no longer** edit the **Currency** field. The currency is transferred to the order items.
- **Prices** are calculated for the individual **order items**. If **price lists** for the items have been defined in the same currency as the offer, these price lists are used to price the items, see **Pricing** on page 421.

Conditions, bulk discounts and special prices must be defined before adding an order, see Conditions on page 419 and Price Lists on page 410.

Conditions

You can define conditions in order to define flexible prices, which are automatically used to price items in orders:

- You can define conditions with fixed prices for individual items.
- Conditions can either apply to an individual item, all items or the items with the same indication group, item type, brand or product.
- For each discount entered in a condition, you can define whether an additional discount can be granted or whether the discount in the condition only applies if no manual discount has been defined.

In order for conditions to be automatically applied to the pricing of items, the following must apply:

- Reps need to be assigned to business areas.
- Valid weightings need to be defined per item and business area.

Note: For further information please contact your administrator.

• Valid prices must be available for the items, see Price Lists on page 410.

Conditions are defined in the **Condition** info area, see **Defining Conditions** on page 419.

For information on the order in which conditions are applied when adding orders, see Pricing on page 421.

Defining Conditions

To define conditions:

- 1. Select **[]** (Sales) > Conditions.
- 2. Click on \oplus (New).
- 3. Enter the Currency.
- 4. Define the time period the conditions are valid for in the Valid from and Valid to fields.
- 5. Select a **Customer Group** if you want the conditions to only apply to orders added for accounts assigned to a particular customer group.
- 6. Enter details on the items the conditions should apply to on the **Product** tab.
 - Item No./Item Name: Enter an item to apply the conditions to a particular item.

Note: Fixed price conditions can only be defined for individual items.

Note: If you select an item from the **Item No.** field, leave the **Item type**, **Indication group**, **Brand** and **Product** fields empty in order for the conditions to be applied.

- Item type/Indication group/Brand/Product: Select an item type, indication group, brand or product to define conditions for all items where these values are entered. For example, if you want to define conditions that apply to all items in an indication group, enter an Indication group and leave the Item type, Brand, Product and Item No. fields empty.
- 7. Enter the conditions:
 - Enter a **Fixed price** to define a fixed price for an item.
 - Enter a **Discount (%)** to define a discount **at the order level**. This discount is applied to the weighted quantity of all order items that the conditions apply to.
- 8. Select what the Conditions apply to:
 - **Item: Additional:** The discount is applied in addition to the other discounts. The discount entered manually in order items is applied first, and then the additional discount from the conditions is calculated.
 - **Item: if nothing entered:** The discount is only applied if no other discount is entered in the order item.
 - **Item: Not Included:** This discount takes precedence over a discount entered manually in an order item; if a discount has been entered there, it is ignored.

Note: This setting has no effect on fixed price conditions.

9. Click Save.

Order Deliveries

Items may be delivered on different dates.

Switch to the **Order Delivery** and **Order Delivery Item** tabs to view information on deliveries.

You can add order delivery and order delivery item records from the call documentation area using the quick add function, see Call Documentation – LSI on page 432.

Pricing

Pricing and discounts are applied at the order level.

When adding an order, the value of the individual items and the total value of the order are determined automatically as follows:

- If a **special offer** is entered in the order, the volume scale and discounts defined for the special offer are applied to the order.
- If no special offer is entered, the item and order values are determined as follows:
 - 1. **Pricing** for the individual items (using prices in price lists and fixed conditions).
 - 2. Discount at the item level, i.e. percentage discounts and discounts in kind.
 - 3. Discount at the order level, i.e. percentage discounts defined in conditions that are applied to the weighted total quantity of the order.

Note: For further information on pricing, contact your administrator.

Adding Items to Orders

Individual items are added to orders using order item records.

To add an order item:

- 1. Switch to the desired order (Orders) node in the tree view of an account.
- 2. Click on \oplus (Quick Add) on the Order Items tab.

The **Currency** is transferred from the order and cannot be edited.

3. Enter data such as the **Quantity** and any discount. The **Value** is calculated automatically.

If suitable price lists are present, the **Price** in the price list is transferred to the item, >> **Price Lists** on page 410 and **Pricing** on page 421.

You can manually change the Price.

Note: The **Price** entered in the price list (if present) is only displayed in the quick add area once the item has been saved. Apply the **Special Offer** filter to only display items for which a special offer is currently valid. If a **Special Offer** has been entered in the order, only special offer items added for the special offer are listed. You cannot add other items to the order. Apply the **Sales Organization** filter to only display those items that have been assigned to a sales organization.

4. Save.

The order item's serial number is entered automatically.

Note: If you have already entered items in an order, you can no longer edit the **Rep** and **Stock** fields in the order record.For further information on calculating the value of order items, contact your administrator.

Adding Orders

Orders consist of a "header record" that contains data relating to the entire order (e.g. order number, currency), and item records that contain data concerning the individual items in the order.

Orders are added for accounts.

Note the following when adding orders:

- If you commonly add orders in various currencies, decide on the currency to be used by the order. Once the order has been saved, you can **no longer** edit the **Currency** field. The currency is transferred to the order items.
- **Prices** are calculated for the individual **order items**. If **price lists** for the items have been defined in the same currency as the offer, these price lists are used to price the items, >> **Pricing** on page 421.

Conditions, bulk discounts and special prices must be defined before adding an order, >> Conditions on page 419 and Price Lists on page 410.

To add an order:

- 1. Switch to the desired account.
- 2. Switch to the **Orders** node in the tree and click on \oplus (**New**).

Order 2130000159 (Direct order)									
 Order Details 									
Order No. 10002-2130000159	Order No. ERP								
Order type Direct order	Order status	Open				Order d	ate 27.03.2	013	
User Berta Basis (9100)	Business area	Rx				St	ock Default		
 Delivery Details 									
Delivery Date 29.03.2013	Currency	EUR							
Payment Terms									
Indiv. Price List	Payment term	60 days	net cash		1	Payment met	hod Cash pa	ayment	
Discount %	0,00%								
Delivery address Miscellaneou:	s Value Billing ad	dress							
Delivery account Bem Spital					[Delivery Acco	u		
Delivery address Neustraße 2						Delivery ph	one		
1010 Wien Austria						Delivery e-	nail		
Provide La real						Delivery	fax		
Parent Data Related Data									■ ~ ≡
Order Items × Order Delivery	× Order Delivery Iter	ns ×	Orde	r Comment	х	Documen	t Links 🗵		
							New	Mod	lify List Fields
Ø Ord Item	Item name	Q	Dir	Price	v	Disc	Disc	Disc	Net i
1 1844	IND 10mg	20		10,00	20				200,00

Default values are entered in some of the fields.

- 3. Enter data such as the **Stock**, **Payment method** (payment method) and any discount.
- 4. Save.

The order number is entered automatically.

Note: You can also add orders (and order items) when documenting calls, >> Call Documentation – LSI on page 432.

Conditions

You can define conditions in order to define flexible prices, which are automatically used to price items in orders:

- You can define conditions with fixed prices for individual items.
- Conditions can either apply to an individual item, all items or the items with the same indication group, item type, brand or product.
- For each discount entered in a condition, you can define whether an additional discount can be granted or whether the discount in the condition only applies if no manual discount has been defined.

In order for conditions to be automatically applied to the pricing of items, the following must apply:

- Reps need to be assigned to business areas.
- Valid weightings need to be defined per item and business area.

Note: For further information please contact your administrator.

• Valid prices must be available for the items, >> Price Lists on page 410.

Conditions are defined in the **Condition** info area, >> **Defining Conditions** on page 419.

For information on the order in which conditions are applied when adding orders, >> Pricing on page 421.

Defining Conditions

To define conditions:

- 1. Select **Sales**) > Conditions.
- 2. Click on \oplus (New).
- 3. Enter the Currency.
- Define the time period the conditions are valid for in the Valid from and Valid to fields.
- Select a Customer Group if you want the conditions to only apply to orders added for accounts assigned to a particular customer group.
- 6. Enter details on the items the conditions should apply to on the **Product** tab.
 - Item No./Item Name: Enter an item to apply the conditions to a particular item.

Note: Fixed price conditions can only be defined for individual items.

Note: If you select an item from the **Item No.** field, leave the **Item type**, **Indication group**, **Brand** and **Product** fields empty in order for the conditions to be applied.

- Item type/Indication group/Brand/Product: Select an item type, indication group, brand or product to define conditions for all items where these values are entered. For example, if you want to define conditions that apply to all items in an indication group, enter an Indication group and leave the Item type, Brand, Product and Item No. fields empty.
- 7. Enter the conditions:
 - Enter a **Fixed price** to define a fixed price for an item.
 - Enter a **Discount (%)** to define a discount **at the order level**. This discount is applied to the weighted quantity of all order items that the conditions apply to.
- 8. Select what the Conditions apply to:
 - **Item: Additional:** The discount is applied in addition to the other discounts. The discount entered manually in order items is applied first, and then the additional discount from the conditions is calculated.
 - **Item: if nothing entered:** The discount is only applied if no other discount is entered in the order item.
 - **Item: Not Included:** This discount takes precedence over a discount entered manually in an order item; if a discount has been entered there, it is ignored.

Note: This setting has no effect on fixed price conditions.

9. Click Save.

Order Deliveries

Items may be delivered on different dates.

Switch to the **Order Delivery** and **Order Delivery Item** tabs to view information on deliveries.

You can add order delivery and order delivery item records from the call documentation area using the quick add function, >> Call Documentation – LSI on page 432.

Pricing

Pricing and discounts are applied at the order level.

When adding an order, the value of the individual items and the total value of the order are determined automatically as follows:

- If a **special offer** is entered in the order, the volume scale and discounts defined for the special offer are applied to the order.
- If no special offer is entered, the item and order values are determined as follows:
 - 1. **Pricing** for the individual items (using prices in price lists and fixed conditions).
 - 2. Discount at the item level, i.e. percentage discounts and discounts in kind.
 - **3. Discount at the order level**, i.e. percentage discounts defined in conditions that are applied to the weighted total quantity of the order.

Note: For further information on pricing, contact your administrator.

Special Offers

You can define special offers for items.

You can define staggered fixed prices and discounts applied to items on special offer, as well as define discounts in kind. Special offer items can be displayed in the quick add areas (for samples, orders, POS).

Use special offers to:

- Add special offer items, which can be displayed in the quick add area.
- Define fixed prices and discounts for various volumes for special offer items, see Special Offer Item Volume Scales on page 427.
- Define discount scales for special offer bundles, see Special Offer Bundle Discounts on page 428.
- Link special offers to activities and associated marketing objectives, see Special Offer Management on page 428.

Note: You can also add special offers within the scope of key account management, see Adding Marketing Objectives on page 486.

Note: For further information on special offers, contact your administrator.

Adding Special Offers

Special offers are not account-specific.

To add a special offer:

- 1. Select **I** (Sales) > Special Offers. Click on ⊕ (New).
- Enter the Special Offer No., Special Offer Name and the time period the special offer is valid (Starts on and Ends on), >> Special Offer Management on page 428.
- 3. Enter data such as the customer group etc. and link the special offer to a marketing activity, if desired, see Marketing Activities on page 521.
- 4. Save.

Special Offer Items

You can add special offer items to special offers. These items are then available in the quick add area, see Quick Add on page 164.

To add special offer items:

- Switch to the desired special offer, and click on ⊕ (Quick Add) on the Special Offer Items tab.
- 2. Enter data such as the Special Offer Quantity, Special Offer Price etc.

Note: The **Order**, **POS Monitoring**, **POS Material** and **Sample** fields determine whether a link to the corresponding info area should be established when linking the special offer with an activity, see **Special Offer Management** on page 428.

3. Save.

Note: You can group special offer items in the **Special Offer Bundle** info area, see **Special Offer Bundle Discounts** on page 428.

Special Offer Item Volume Scales

You can define bulk volumes for individual special offer items in order to determine fixed prices, bulk discounts and discounts in kind depending on the quantity of an item entered in an order item record.

You can also define discounts scales that apply to all special offer items in a particular indication group or of a particular type etc.

To define special offer volume scales, switch to the desired special offer item and click on \oplus (**New**) on the **Special Offer Item Scale** tab.

To define volume-based fixed prices for individual items:

- 1. Select "Fixed price scale" in the **Volume Type** field.
- 2. Enter the Volume From and Volume Up To to define the quantity range.
- 3. Select "Order Item" in the **Comp. value** field.
- 4. Enter a Fixed price.

To define discounts for the weighted total quantity of all items added to an order:

- 1. Select "Scale of discount (weighted total quantity)" in the Volume Type field.
- 2. Enter the Volume From and Volume Up To to define the quantity range.
- 3. Select "Total Order" in the **Comp. value** field.
- 4. Enter a **Discount %** (percentage discount).

To define bulk discounts and/or discounts in kind at the item level:

- 1. Select "Scale of discount" in the Volume Type field.
- 2. Enter the Volume From and Volume Up To to define the quantity range.
- 3. Select "Order Item" in the Comp. value field.
- Enter the discount in kind in the Discount in kind field and/or a bulk discount in the Discount % field.

Note: You can combined bulk discounts and discounts in kind. However the volume ranges must be the same.

Define any additional scales as required.

Special offer item scales are taken into account prior to all conditions and price lists when pricing items and applying discounts, >> Pricing on page 421.

Note: For further information please contact your administrator.

Special Offer Bundle Discounts

You can define bundles and define quantity scales for the bundle in order to define price discounts or discounts in kind in the child **Special Offer Bundle Scale** info area.

To add a bundle:

1. Select **Select** (Sales) > Special Offer Bundles.

- 2. Click on \oplus (New).
- Enter a name for the bundle and select a Currency for the amount (amounts are automatically converted to the currency entered in the order when adding an order) and enter the Discount type.
- 4. Save the record.
- 5. Open the special offer bundle and click on \oplus (New) on the Special Offer Bundle Scales tab.

- 6. Enter the quantity the discount applies to in the Quantity from/to fields for bulk discounts or a value range in the Value from/to fields for discounts based on the value. Enter the desired discount and/or discount in kind.
- 7. Save.

Once you have defined a special offer bundle, you can add items to the bundle. To do so:

 Switch to the Special Offer Item info area and enter the desired bundle in the Special Offer Bundle field of those items you wish to group. If you are using discounts in kind, you also need to enter the percentage of the (group's) discount in kind to apply to the item in the Discount in kind share field.

Discounts are applied when entering orders once the quantity or value of all items surpasses the threshold defined in the scale. This means that, irrespective of which items in the group are actually added to the order, the discount is applied to all items (in the group). Each time items are added, the item discounts are recalculated, see Pricing on page 421.

Special Offer Management

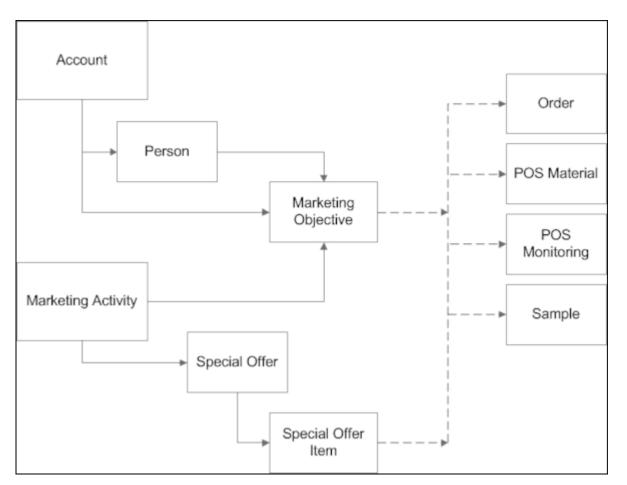
Use Aurea CRM's special offer management features to assign special offers to target groups and access special offer items automatically in the quick add area.

Associating Special Offers with Marketing Activities

Special offers can be associated with existing marketing activities and the related marketing objectives generated within the scope of the marketing activity.

Linking via the Quick Add Function

A link to the special offer is established via a marketing objective record and is only established when adding items using the quick add function, see Quick Add on page 164.



This association with the marketing activity and marketing objective allows multiple special offers and consequently specific items to be assigned to an account. The rep assigned to an account receives an overview of the planned marketing activity steps, carries out these steps and then enters the feedback in the **Marketing Objective** info area. For example, if the marketing activity involved monitoring a POS, the rep can access the items for which a special offer exists in the quick add area. The time period entered in the marketing objectives and special offer are taken into account.

Special Offer Management: Workflow

To use the special offer management features:

- 1. Add a marketing activity including all necessary related data (e.g. a target group) and execute the activity, see Marketing Activities on page 521.
- 2. By automatically or manually generating marketing objectives, tasks are added for the selected accounts or persons.

Note: If you add a marketing objective manually, enter the associated marketing activity.

3. Add a special offer and assign a marketing activity to it.

Note: The Additional items check box must be enabled in the special offer.

Note: Enter a validity period in the **Start date** and **End date** in the special offer, see Adding Special Offers on page 426.

- 4. Add the special offer items. Determine in which info areas the item should be available using the quick add function, see Special Offer Items on page 426.
- 5. For example, if you add a new order for a member of a target group, the items currently on special offer are listed.

Note: For further information on special offers, contact your administrator.

Adding Special Offers

Special offers are not account-specific.

To add a special offer:

- 1. Select **I** (Sales) > Special Offers. Click on ⊕ (New).
- Enter the Special Offer No., Special Offer Name and the time period the special offer is valid (Starts on and Ends on), >> Special Offer Management on page 428.
- 3. Enter data such as the customer group etc. and link the special offer to a marketing activity, if desired, >> Marketing Activities on page 521.
- 4. Save.

Special Offer Items

You can add special offer items to special offers. These items are then available in the quick add area, see Quick Add on page 164.

To add special offer items:

- Switch to the desired special offer, and click on ⊕ (Quick Add) on the Special Offer Items tab.
- 2. Enter data such as the Special Offer Quantity, Special Offer Price etc.

Note: The **Order**, **POS Monitoring**, **POS Material** and **Sample** fields determine whether a link to the corresponding info area should be established when linking the special offer with an activity, see **Special Offer Management** on page 428.

3. Save.

Note: You can group special offer items in the **Special Offer Bundle** info area, see **Special Offer Bundle Discounts** on page 428.

Special Offer Item Volume Scales

You can define bulk volumes for individual special offer items in order to determine fixed prices, bulk discounts and discounts in kind depending on the quantity of an item entered in an order item record.

You can also define discounts scales that apply to all special offer items in a particular indication group or of a particular type etc.

To define special offer volume scales, switch to the desired special offer item and click on \oplus (New) on the Special Offer Item Scale tab.

To define volume-based fixed prices for individual items:

- 1. Select "Fixed price scale" in the Volume Type field.
- 2. Enter the Volume From and Volume Up To to define the quantity range.
- 3. Select "Order Item" in the **Comp. value** field.
- 4. Enter a Fixed price.

To define **discounts for the weighted total quantity** of all items added to an order:

- 1. Select "Scale of discount (weighted total quantity)" in the Volume Type field.
- 2. Enter the Volume From and Volume Up To to define the quantity range.
- 3. Select "Total Order" in the **Comp. value** field.
- 4. Enter a **Discount %** (percentage discount).

To define bulk discounts and/or discounts in kind at the item level:

- 1. Select "Scale of discount" in the Volume Type field.
- 2. Enter the Volume From and Volume Up To to define the quantity range.
- 3. Select "Order Item" in the Comp. value field.
- Enter the discount in kind in the Discount in kind field and/or a bulk discount in the Discount % field.

Note: You can combined bulk discounts and discounts in kind. However the volume ranges must be the same.

Define any additional scales as required.

Special offer item scales are taken into account prior to all conditions and price lists when pricing items and applying discounts, >> Pricing on page 421.

Note: For further information please contact your administrator.

Special Offer Bundle Discounts

You can define bundles and define quantity scales for the bundle in order to define price discounts or discounts in kind in the child **Special Offer Bundle Scale** info area.

To add a bundle:

- 1. Select **Sales**) > Special Offer Bundles.
- 2. Click on \oplus (New).
- 3. Enter a name for the bundle and select a **Currency** for the amount (amounts are automatically converted to the currency entered in the order when adding an order) and enter the **Discount type**.
- 4. Save the record.
- 5. Open the special offer bundle and click on \oplus (New) on the Special Offer Bundle Scales tab.
- 6. Enter the quantity the discount applies to in the Quantity from/to fields for bulk discounts or a value range in the Value from/to fields for discounts based on the value. Enter the desired discount and/or discount in kind.
- 7. Save.

Once you have defined a special offer bundle, you can add items to the bundle. To do so:

 Switch to the Special Offer Item info area and enter the desired bundle in the Special Offer Bundle field of those items you wish to group. If you are using discounts in kind, you also need to enter the percentage of the (group's) discount in kind to apply to the item in the Discount in kind share field.

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Special Offer Management

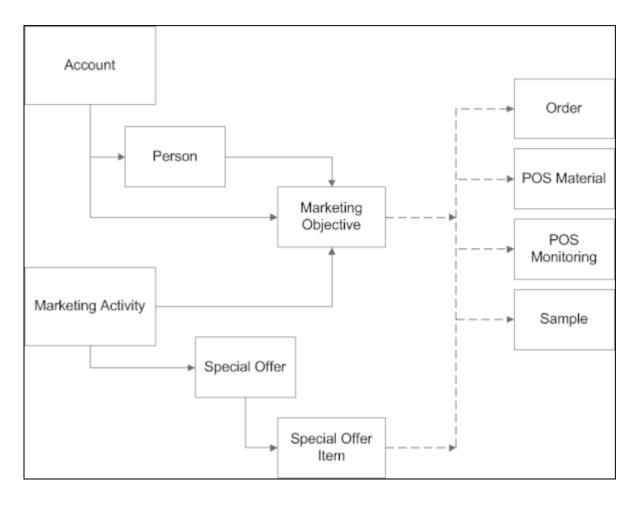
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Special Offer Management: Workflow

To use the special offer management features:

- 1. Add a marketing activity including all necessary related data (e.g. a target group) and execute the activity, see Marketing Activities on page 521.
- 2. By automatically or manually generating marketing objectives, tasks are added for the selected accounts or persons.

Note: If you add a marketing objective manually, enter the associated marketing activity.

3. Add a special offer and assign a marketing activity to it.

Note: The Additional items check box must be enabled in the special offer.

Note: Enter a validity period in the **Start date** and **End date** in the special offer, see Adding Special Offers on page 426.

- 4. Add the special offer items. Determine in which info areas the item should be available using the quick add function, see Special Offer Items on page 426.
- 5. For example, if you add a new order for a member of a target group, the items currently on special offer are listed.

Note: For further information on special offers, contact your administrator.

Special Offer Management: Workflow

To use the special offer management features:

- 1. Add a marketing activity including all necessary related data (e.g. a target group) and execute the activity, see Marketing Activities on page 521.
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Note: If you add a marketing objective manually, enter the associated marketing activity.

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Note: The Additional items check box must be enabled in the special offer.

Note: Enter a validity period in the **Start date** and **End date** in the special offer, see Adding Special Offers on page 426.

- 4. Add the special offer items. Determine in which info areas the item should be available using the quick add function, see Special Offer Items on page 426.
- **5.** For example, if you add a new order for a member of a target group, the items currently on special offer are listed.

Note: For further information on special offers, contact your administrator.

8

Call Documentation – LSI

Use the Call Documentation process to prepare for and document your customer calls.

The process consists of several phases where you can enter data relating to a visit step by step. By default, you can only start the **Call Documentation** process from activities of the type "Visit". Your administrator can however determine that the process is available for other types of activities (e.g. phone calls).

You can start the process as follows:

• Your start page displays a list of all **Undocumented activities**. Double-click on an activity or select Call Documentation from the activity's context menu. The process is started in the **Overview** phase, see **Overview** on page 444.

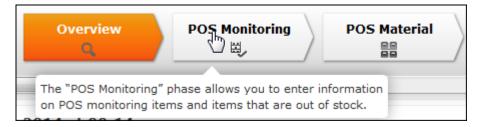
Note: Only activities whose Type is "Visit" and Status is "Scheduled", where the start date is before or on today's date and where you are entered are listed.

- Switch to the desired activity in the calendar, using the activity search from the Activities node in the company tree etc. Select **Visit Documentation** from the context menu of the activity. The process is started in the Overview phase.
- Select (Daily business) > Call Documentation. The process is started in the Activities phase, see Activities on page 443.
- If you add an activity by selecting (Daily Businesss) > New Activity, you can switch to the call documentation process after saving the record.

Click on an arrow in the header to switch to the corresponding phase. Any data you have entered is saved automatically. The currently selected phase is highlighted in orange.

You can exit the call documentation process at any time and continue at a later date.

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.



Data on the current visit is displayed at the top right next to the phases (e.g. the visited person/company).



Data entered in the quick add area is saved automatically.

The following sections cover all phases delivered by Aurea software. Your administrator is responsible for defining which phases are available to you.

Activities

The "Activities" phase displays a list of the activities scheduled over the past 7 days that have already been documented and those still requiring documentation.

Note: This <u>phase</u> is only displayed if you access the call documentation process

by selecting (Daily Business) > Call Documentation or click on the Activities phase arrow. When opening the process from an activity, the **Overview** phase is opened.

2 1	Overview Q	POS Monitoring 리,	POS Material	Order	⑦ 06.06.2014 ○ Ran Superm
					•
Undocumented act	tivities over the last 7	/ days			
					🖉 Set to Misse
Company	Person	Starts on	Starts at	Subject	Status
Ran Supermark	t	06.06.2014	15:53		Scheduled
Documented activi	ities over the last 7 d	ays			
					all Documentation Repo

- Double-click on an activity under **Undocumented activities over the last 7 days** to open the activity in the **Overview** phase, see **Overview** on page 444. You can now switch between phases in the process by clicking on the arrows in the header.
- Select one of more activities (Ctrl+click) under Undocumented activities over the last 7 days and click on
 (Set to Missed) to set the status of the selected activities to "Missed".
- Click on (Call Documentation Report) under Documented activities over the last 7 days to generate a report containing all information entered for the visit (e.g. POS monitoring data, orders, visit expenses, tasks, completed marketing objectives). Click on (Print) to print the report.

Overview

The "Overview" phase provides you with an overview of the information entered concerning the visit and any marketing objectives and follow-up objectives that require completion. Any documents added to the activity (e.g. product brochures, product videos) and open tasks are also displayed. Click on (Quick View) to display information on these records in the quick view.

The phase allows you to prepare for upcoming visits. You cannot add or edit any child data in this phase.

₿1 / C	POS Monitoring	POS Material		der (2000.00 ■. Ran	Superm
				,	
】 Visit on 06.06.2014 at	14:00				
/ 🗸 Ø					
Type 👗 Visit	Assigned by		Rep	Arno Admin (9200)	1
Subject					
Business area Consumer goods	Purpose		Status	Scheduled	
Satisfaction Indifferent	Result Activity pla	anned	Run	06.06.2014 - 14:00)
All day activity	Private		End	06.06.2014 - 16:00)
ixed contact	Follow-up date		Event Location	1050 Wien, Austria	1
Text Participants Question Text	nnaires / Portfolios Samples Mai	rketing Activity	Links System		
	nnaires / Portfolios Samples Mai	rketing Activity	Links System		
Text					
	nnaires / Portfolios Samples Mar	rketing Activity			
Text					
Text Valid and Open Job Cards	Start Ends Co An 29.04 29.04	≡ My Open Task			

POS Monitoring

The "POS Monitoring" phase allows you to enter information on facings at a point of sale, e.g. a pharmacy, see Point of Sale on page 467.

Switching to this phase opens the quick add area for POS monitoring items, see Quick Add on page 164.

Enter the information on the items at the point of sale. Click on **Listing** in the quick add area, to display the listings valid for the company, including those inherited from companies higher up the corporate hierarchy, see Relationship Management on page 247. Apply the **Last POS Monitoring** filter to display the POS monitoring items entered in the last POS monitoring. Apply the **Special Offer** filter to only display items for which a special offer is currently valid.

All	Overv	iew Special O	ffer Last POS M	Ionitoring	Listing			
Item N	0.	Iter	m type	~				
Item nan	ne							
Indication		~	Brand	~	Product	~		
	+ Add more	. ¥						
Max. 15	 records per 	page			Reset	Start Search		
Max. 15	 records per 	page			Reset	Start Search		
_	<pre>records per 15 of 15+ > >></pre>				Reset	Start Search	Duplicate Reco	ord 🗙 Delet
			Out of stock	Stock			Duplicate Reco Placement	
<< < 1 - 1	15 of 15+ > >> Item No.		Out of stock	Stock 33	Facings	Facing spac		Shelf pric
((< 1 -))	15 of 15+ > >> Item No.	Item name	Out of stock		Facings	Facing spac	Placement	Shelf pric
((< 1 -)))	15 of 15+ > >> Item No. 00001 00002	Item name HeartHealth C	Out of stock		Facings 5	Facing spac	Placement In front of cou	Shelf pric
(((1 -))))	15 of 15+ > >> Item No. 00001 00002	Item name HeartHealth C OrangeMED C	Out of stock	33	Facings 5	Facing spac 95%	Placement In front of cou	Shelf pric

You can flag items as being **Out of stock**. The number of items that are currently out of stock is displayed under **Total out of stock** to the right of the search criteria.

POS Material

The "POS Material" phase allows you to enter information on promotional material you have distributed.

Switching to this phase opens the quick add area for POS material items, see Quick Add on page 164.

If several POS material records have been added for the activity, an overview is displayed.

0	Q F	POS Monitoring 떠	POS Materi	ord	er	Questionnaires	06.06.2014
							•
8	Search POS Mate	rial linked to I	Ran Supermarkt			–	Today 🖉 No Filter 🛚
	Search POS Mate	rial linked to	Ran Supermarkt			Y	Today ⊘ No Filter ♥ + New POS Material
	Search POS Mate	rial linked to Date	Ran Supermarkt Order status	Rep	POS Materia		
		Date			POS Materia		+ New POS Material

- Click on a POS material record in the list to display the POS material items added for the record.
- Click on $\mathbf{\overline{Y}}$ (**Today**) to display the POS material distributed on the current date.
- Double-click on a POS material record to open the quick add area.
- Click on

 (New POS Material) to add a new POS material record. The quick add area is opened.

Over)	Monitoring し	POS Materia		Order L	Question	indires (06.06.2014 Ran Superm
			ш				÷	
Items	s of <u>POS Material</u>	2140000050	- 06.06.2014				+ New POS M	aterial Q Overview
All	Overview							
Item I		Item type		+ ~				
Item nar	me							Total Quantity
Product ty	y	+ 🗸 🛛 Brand		+ ~	Product	+ ~		Total Value
	+ Add more	~						0
Max. 15	✓ records per page				Reset	Start Search		
≪ < 1 -	15 of 15+ 🕽 🔊						Duplicate	Record 🗙 Delete
1	Item No.	Item	name				Quantity	Price
v 0	1234	Updal	e Power pills					
	3214	Renni	Power pills					
	50000702	Displa	y-Aufsteller Saiso	n-Promot	ion			
	40189703	Miner	alwasser					

Enter quantities in the quick add area:

- Enter item quantities in the quick add area.
- Click on **H** (New POS Material) to add a new POS material record.
- Click on Q (Overview) in the quick add area to display an overview of all POS material records.

Order

You can add and edit orders and order items in the "Order" phase. Different delivery dates can be entered for items in the order if the order is split over multiple deliveries. Order items are added using the quick add area, see Quick Add on page 164.

When switching to this phase, the new mask for orders is displayed, see Adding Orders on page 417. The quick add area for order items is opened once the order has been saved. A delivery date is added automatically for the order and item that is delivered on this date can be entered in the quick add area. If you switch to this phase and only a single order exists on the same date as the activity, the quick add area is opened automatically.

Click on *o* (**Cancel**) to switch to the overview without adding an order.

The **overview** displays an overview of the orders.

Select an order to display the order items, delivery dates and delivery items.

Sear	rch Orders linked	to Run Supern					T .ouay	No Filter
					+ New	Order + New	Delivery	Order Prev
P.1	Order No.	Order date	Order type	Order	status	Order net	value Curr	ency
₽≡ •	10002-2140000063	06.06.2014	Direct order	Open			EUR	
	10002-2140000064	06.06.2014	Direct order	Open			EUR	
elated	Data							
Ord	er Items		^ ×	∃ Order	Delivery Iter	ns		^
			-→ Browse					→ Brows
d -	0 Ite Item	name QLEI	VACDON	ø	Order Item	Delivery	Quantity	Discount
	2 3214 Renni I	Power pills 2			Renni Powe	09.06.2014	2	
	1 1234 Update	Power 3			Update Po	09.06.2014	3	
Ord	er Deliveries		^ ×					
	Delivery Date	Delivery No.	Order					
	09.05.2014	1	Direct order 06					

- Click on
 (Show/Hide) in the search area at the top of the page to expand or contract the order search.
- Click on **Y** (Today) to display orders with the current date. This filter is enabled by default.
- Click on **H** (New Order) to add a new order.
- Double-click on an order to open the quick add area and enter the order items.
- Select an order and click on (Order Preview) to generate a report containing information on the order (e.g. the items, deliveries, discount and total value).
 Click on (Print) to print the report.

The quick add area for order items is opened automatically after adding a new order or when double-clicking on an order in the overview.

All	Ove	erview Last Ord	fer Special	Offer Lis	ting					
Sales 0	rganizatio	n						٦∎2	Tota	al Quant
Item No		Item	type	+ ~					7	fotal Va
tem nam	e									
oduct ty.		+ ~	Brand	+ ~	Product		+ ~		lota	Wtd. Q
	+ Add more	e 🗸							1.	m done
ix. 15	records ;	per page			Reset		Start Search			
< 1 - 1	5 of 15+ >	>>						+ New D	alivary	¥ Dela
,	Item	Item name	Product type	Brand	Q	Brice	D Disco	Net it S		
10	1234	Update Power pills	Product type	branu		Frice	D Disco	Net It 5	Late	LOUNC
``-		Renni Power pills			2					
11		Display-Aufsteller S		Private label s	~					
		Mineralwasser	Water	Private label s						
		Helles Bier	Cookies	Private label						
		Schokoriegel	Chocolates	White label be						
		Schokolade-Osterh	Chocolates	White label be						
	123456	Schoko-Pralinen	Chocolates	White label be						
	456789	Erdbeer-Pralinen	Chocolates	White label be						
	789456	Vanille-Pralinen	Chocolates	White label be						
	9600_0	Spezialaufsteller Ge	Soft-Drinks							
	9600_0	Displayaufsteller Pr								
	9600_0	Kekse mit Schokost	Cookies	Private label s						
	9600_0	Kekse mit kleinen S	Cookies	White label s						
	9600_0	Weihnachtskekse	Cookies	Private label s						
					5	0,00		0,00 << <	1 - 15 of	15+ >
elated	Data									0 🖿
Recent o	rders indu	ding this item: ×								

- Click on **Q** (**Overview**) in the quick add area to return to the overview.
- Click on # (New Order) in the quick add area to add a new order. Click on # (New Delivery) to add a new delivery for the order.
- Click in the **Quantity** cell of an item. The dates you have defined as delivery dates are displayed as separate cells. Enter the quantity that is delivered on each date in the appropriate cells. Once you switch to another row to confirm the quantities, the sum total entered for all delivery dates is displayed in the **Quantity** cell.

Click on **Listing** in the quick add area, to display the listings valid for the company, including those inherited from companies higher up the corporate hierarchy, see **Relationship Management** on page 247. Apply the **Last Order** filter to display the items entered in the last order. Apply the **Special Offer** filter to only display items for which a special offer is currently valid. Apply the **Sales Organization** filter to only display those items that have been assigned to a sales organization.

Note: If a **Special Offer** has been entered in the order, only special offer items added for the special offer are listed in the quick add area. You cannot add other items to the order.

 If an item has previously been ordered, the quantity ordered is displayed under Related Data. Select an order on the left to display the deliveries on the right. Click on (Show Order) to display information on the order.

Product Detailing

The "Product Detailing" phase allows you enter to information on the products that have been discussed. The number of items requiring discussion is displayed in the phase arrow.

Switching to this phase opens the quick add area for product detailing items, see Quick Add on page 164.

All product detailing items valid for this activity are listed, see Product Detailing – LSI on page 502. The PD prio and PD standard filters restrict the display to only those items defined as the being of the corresponding type.

Items o	f <u>Visit o</u>	n 05.06.20	14 at 10:00	0						SH CU
All	Ove	rview	D prio	PD standard						
Item No.			Item type		~			7		
Item name Product ty		Ŷ	Brand		Ŷ	Product		÷		
+	Add more	v								
Max. 15 ¥	records p	er page				Reset	Start Sea	rch		
										× Delete
Ø 1	tem No.	Item na	Brand	Product	Discussed	Response	Brand R	Comment	Category	Order
	500_001	Anti Pain	Original dr							
9	500_006	HearthHea	Generic dr	Indication						
0	500_005	orangeMed	Original dr	Indication						

If you are using the closed loop marketing add-on supplied by our partner SKURA, click on **S** (**CLM**) to access your presentation on the SKURA server.

Samples

The "Samples" phase allows you to enter the samples your have distributed and those requested by the customer. Samples can only be distributed to persons; this phase is therefore only available for visits to a person.

Switching to this phase opens the quick add area for samples, see Quick Add on page 164. Click on **Samples** to restrict the display to the items for which a valid sample configuration exists and with an **Available Quota**, see **Sample Configuration** on page 492. Apply the **Special Offer** filter to only display items for which a special offer is currently valid.

Sampl	es of <u>Visit</u>	on 05.06.2014 at 10:00					
Overv	iew Sa	mples Special Offer					
	Busines	is Area -x- Rx					
		Date 05.06.2014					Total Issued
Item N	io.	Item type	~				
Item nar	ne						Total ordered
Product ty	/	✓ Brand	~	Produc	t	~	0
	+ Add more						
Max. 15	✓ records p	er page		Rese	st Start Se	earch	
≪ < 1 -	15 of 15+ 🕽	>>					🕞 Sign 🗙 Delete
d l	Item No.	Item name	Quantity is	sued Q	uantity order	Available Quota	Stock Lot No.
√ 0	00001	HeartHealth Capsules 10 mg		5			
	00002	OrangeMED Capsules				100	
	00003	PainlessCRM Capsules				150	
	00005	update Brain Capsules				150	
	1214	milg 300 NHK				-	

To generate a receipt that can be signed by a doctor receiving samples:

- 1. Click on 🕮 (Sign) and select a template. A Microsoft Word document is generated containing information on the samples.
- 2. Click on $\stackrel{X}{\longrightarrow}$ at the end of the document to insert a digital signature.
- 3. Close the document.

The document is automatically linked to the activity. You can access the document in the **Complete** phase.

Note: If you are using a touch device, customers can sign the report with a stylus.

Questionnaires

The "Questionnaires" phase allows you to complete questionnaires that are valid for the current visit. This phase is unavailable if no questionnaires are valid. This number of available questionnaires is displayed in the phase arrow.

When switching to this phase, all questionnaires are listed that have been added for this activity or assigned to the company you are visiting using marketing objectives.

- The status of the questionnaire (finalized or open) is displayed in brackets.
- Double-click on a questionnaire to answer the questions, see Carrying Out a Survey on page 332.
- Click on **(Overview**) to return to the overview of available questionnaires.

Characteristics

The "Characteristics" phase allows you to enter or change the characteristics defined for the company and/or person you are visiting, see Characteristics on page 243.

Samples	uestionnaires	Characteristics	Complaint	Free Sample
				Þ
E				
Characteristics	s for Prof Dr.med	Bernd Hummel		
• characteristic	s for Prof.Dr.inet	. Derna nammer		
Group Name = Ho	bbbies (single selection			
Baseball		Cooking	✓ Golf	
Soccer		Travelling		

Medical Inquiry

The "Medical Inquiry" phase allows you to add medical inquiries, see Customer Service – LSI on page 796.

Switching to this phase opens the new mask for medical inquiries. If medical inquiries have already been added for this customer, these are listed.

Search Medical Inqui Alexander Kiefer Lab			▼ op	en 🝸 In Progress + New Me	🖉 No Filter dical Inquiry
Search Results					
A Medic Due on	Subject	Inquiry topic	Inquiry	Status	Created on
11.06.2014				Open	06.06.2014
a Medical Inquiry 175					
≡ 🖋 🗸 ⊘					
Account <u>Alexander Kiefer</u> Laborarztpraxis	Person				
Please call b	Please reply				
Please call b	Please reply				
Request details Social					
Medical inqu	Entered on	06.06.2014	Due date to 11	1.06.2014-15:00	
Inquiry topic	Inquiry				
Status Open	Item No.				

- Click on
 (Show/Hide) in the search area to expand or contract the medical inquiries search.
- Click on **H** (New Medical Inquiry) to add a new medical inquiry.
- Click on ▼ (Open) or ▼ (In Progress) to only display medical inquiries that are open or in progress.

Complete

The "Complete" phase allows you to enter the costs associated with your visit and complete the call. You can add and edit related records (e.g. add tasks and set marketing objectives to "Completed").

💆 Visit on 27.08.2014 at 16:25				~
🚍 🖋 🧹 ⊘ 层 Call Documentation Rep	ort 🕞 Complete			
Type 👗 Visit	Assigned by		Rep	Adam Aussendienst
Subject Kontaktplanung:				
Business area Rx	Purpose		Status	Scheduled
Satisfaction Indifferent	Result Activity	/ planned	Run	27.08.2014 - 16:25
All day activity	Private 📃		End	27.08.2014 - 16:55
ixed contact	Follow-up date		Event Location	Carl-Zeiss-Str. 41 b, 55129 Mainz, Germany
Text				
Text				
Valid and Open Marketing Objectives	s 🔺	🗏 My Open Tasi	15	
	s 🔺	😑 My Open Tasł		
	🕞 Completed 👻	My Open Task Documents		
Valid and Open Marketing Objective Valid and Open Follow-Up Objective	🕞 Completed 👻			w 🕞 Completed 🥝 Missed
Valid and Open Marketing Objective Valid and Open Follow-Up Objective	Completed v			ew 🕞 Completed 🤗 Missed

 Click on I (Call Documentation Report) to generate a report containing information entered for the visit (e.g. POS monitoring data, orders, visit expenses, tasks, completed marketing objectives). Click on (Print) to print the report.

Note: You can only add expenses with the **Receipt type** "Sponsoring" if the visit was added for a company, not a person.

- Click on + (New) under Call Expenses to enter the costs associated with your visit. When adding new expenses, an overview of your expenses budget is displayed.
- To complete the visit, set the **Status** to "Completed" or click on (Complete) to set the status automatically. The "Activities" phase is opened and you can document the next visit.

Activities

The "Activities" phase displays a list of the activities scheduled over the past 7 days that have already been documented and those still requiring documentation.

Note: This phase is only displayed if you access the call documentation process

by selecting (Daily Business) > Call Documentation or click on the Activities phase arrow. When opening the process from an activity, the **Overview** phase is opened.

Activities	Overview	POS Monitoring 閊,	POS Material	Order	06.06.2014
	/	/		_/	
Undocumented activ	ities over the last 7	days			^
					🖉 Set to Missed
Company	Person	Starts on	Starts at	Subject	Status
Ran Supermarkt		06.06.2014	15:53		Scheduled
Documented activiti	es over the last 7 da	iys			^
				Cal	Documentation Report
		The query return	ned no results.		

- Double-click on an activity under **Undocumented activities over the last 7 days** to open the activity in the **Overview** phase, >> **Overview** on page 444. You can now switch between phases in the process by clicking on the arrows in the header.
- Select one of more activities (Ctrl+click) under Undocumented activities over the last 7 days and click on ⊘ (Set to Missed) to set the status of the selected activities to "Missed".
- Click on (Call Documentation Report) under Documented activities over the last 7 days to generate a report containing all all information entered for the visit (e.g. POS monitoring data, orders, visit expenses, tasks, completed marketing objectives). Click on (Print) to print the report.

Overview

The "Overview" phase provides you with an overview of the information entered concerning the visit and any marketing objectives and follow-up objectives that require completion. Any documents added to the activity (e.g. product brochures,

product videos) and open tasks are also displayed. Click on 僅 (Quick View) to display information on these records in the quick view.

The phase allows you to prepare for upcoming visits. You cannot add or edit any child data in this phase.

Activities	Overview Q	POS Monitoring 떤	POS Material		der 🔁 06.06.2014
					•
Z Visit on 06.06.	2014 at 14:00				
/ 🗸 Ø					
Type 👗 Visit		Assigned by		Rep	Arno Admin (9200)
Subject					
Business area Consum		Purpose		Status	Scheduled
Satisfaction Indiffer	ent	Result Activity	y planned	Run	06.06.2014 - 14:00
All day activity 🔲		Private 📃		End	06.06.2014 - 16:00
ixed contact		Follow-up date		Event Location	1050 Wien, Austria
Text Participants	Questionnaires /	Portfolios Samples	Marketing Activity Li	nks System	
Text Participants Text	Questionnaires /	Portfolios Samples	Marketing Activity Li	nks System	
		Portfolios Samples	Marketing Activity Li	nks System	
Text	b Cards Text Sta			nks System	
Text Valid and Open Jo Text (Mark	b Cards Text Sta	rt Ends Co An	⊟ My Open Tasks	nks System	

POS Monitoring

The "POS Monitoring" phase allows you to enter information on facings at a point of sale, e.g. a pharmacy, see Point of Sale on page 467.

Switching to this phase opens the quick add area for POS monitoring items, see Quick Add on page 164.

Enter the information on the items at the point of sale. Click on **Listing** in the quick add area, to display the listings valid for the company, including those inherited from companies higher up the corporate hierarchy, see **Relationship Management** on page 247. Apply the **Last POS Monitoring** filter to display the POS monitoring items entered in the last POS monitoring. Apply the **Special Offer** filter to only display items for which a special offer is currently valid.

All	Overv	iew Special O	ffer Last POS M	Ionitoring	Listing			
Item N	0.	Iter	m type	~				
Item nan	ne							
ndication		~	Brand	× 1	Product	~		
	+ Add more	. v						
May. 15	 records per 							
		Dage			Reset	Start Search		
10	records per	page			Reset	Start Search		
	15 of 15+ > >>				Reset	Start Search	Duplicate Reco	ord X Delet
			Out of stock	Stock			Duplicate Reco	
« < 1 -) P	15 of 15+ > >>		Out of stock	Stock 33	Facings	Facing spac		Shelf pric
((< 1 -) ()	15 of 15+ > >> Item No.	Item name	Out of stock		Facings	Facing spac	Placement	Shelf pric
((< 1 -)))]	Item No.	Item name HeartHealth C	Out of stock		Facings	Facing spac 95%	Placement	Shelf pric
((< 1 -)))]	15 of 15+ > >> Item No. 00001 00002	Item name HeartHealth C OrangeMED C	Out of stock	33	Facings 5	Facing spac 95%	Placement In front of cou	Shelf pric

You can flag items as being **Out of stock**. The number of items that are currently out of stock is displayed under **Total out of stock** to the right of the search criteria.

POS Material

The "POS Material" phase allows you to enter information on promotional material you have distributed.

Switching to this phase opens the quick add area for POS material items, >> Quick Add on page 164.

If several POS material records have been added for the activity, an overview is displayed.

0	Q I	POS Monitoring 리,	POS Materi	al Ord	er	Questionnaires	06.06.2014
							•
	Search POS Mate	erial linked to	Ran Supermarkt			Y	Today 🖉 No Filter 🕚
	Search POS Mate	Date	Ran Supermarkt Order status	Rep	POS Material		+ New POS Materia
e s		Date	-		POS Material		Yoday ⊘ No Filter ↑ + New POS Materia Number of Ite

- Click on a POS material record in the list to display the POS material items added for the record.
- Click on $\mathbf{\overline{Y}}$ (**Today**) to display the POS material distributed on the current date.

- Double-click on a POS material record to open the quick add area.
- Click on + (New POS Material) to add a new POS material record. The quick add area is opened.

Oven Q)	S Monitori ⊠_		laterial	Order		ionnaires	💆 06.06.2014 ∰ Ran Superm
							P	
Items	of POS Mater	ial 21400	00050 - 06.06	.2014			+ New PO:	5 Material Q, Overview
All Item N Item nam Product ty		1	tem type	+ *	Product	+		Total Quantity Total Value
	Add more records per page				Reset	Start Search		Ū
<< < 1 -	15 of 15+ 🕽 🚿						🐚 Duplic	ate Record 🗙 Delete
de la	Item No.		Item name				Quantity	Price
~ 0	1234		Update Power p	ills				
	3214		Renni Power pill	s				
	50000702		Display-Aufstell	er Saison-Promot	ion			
	40189703		Mineralwasser					

Enter quantities in the quick add area:

- Enter item quantities in the quick add area.
- Click on **H** (New POS Material) to add a new POS material record.
- Click on Q (Overview) in the quick add area to display an overview of all POS material records.

Order

You can add and edit orders and order items in the "Order" phase. Different delivery dates can be entered for items in the order if the order is split over multiple deliveries. Order items are added using the quick add area, see Quick Add on page 164.

When switching to this phase, the new mask for orders is displayed, see Adding Orders on page 417. The quick add area for order items is opened once the order has been saved. A delivery date is added automatically for the order and item that will be delivered on this date can be entered in the quick add area. If you switch to this phase and only a single order exists on the same date as the activity, the quick add area is opened automatically.

Click on *o* (**Cancel**) to switch to the overview without adding an order.

The **overview** displays an overview of the orders.

Select an order to display the order items, delivery dates and delivery items.

			+ New	Order + New Delivery	Order Previe
Order No.	Order date	Order type	Order status	Order net value Cu	rrency
10002-2140000063	06.06.2014	Direct order	Open	EUI	
0002-2140000064	06.06.2014	Direct order	Open	EUI	R
ata					
Items		A X	🗏 Order Delivery Ite	ms	^
		→ Browse			→ Browse
0 Ite Item n	ame QLE	PVAEDEN	🖉 🛛 Order Item	Delivery Quantit	y Discount
2 3214 Renni P	ower pills 2		Renni Powe.	09.06.2014	2
1 1234 Update	Power 3		Update Po	09.06.2014	3
Deliveries		A X			
	0002-2140000063 0002-2140000064 ata Items 0 Ite Item n 2 3214 Renni P 1 1234 Update	0 Item name Qs C 2 3214 Renni Power pills 2 1 1234 Update Power 3	00002-2140000063 06.06.2014 Direct order Items 0 Item. Item name QL C P Va C N 2 3214 Renni Power pills 2 1 1234 Update Power 3 0 I </td <td>00002-2140000063 06.06.2014 Direct order Open 0002-2140000064 06.06.2014 Direct order Open ata Items A X E Order Delivery Ite 0 Ite Item name QL P Va C D K 2 3214 Renni Power pills 2 Renni Powe. Update Po 1 1234 Update Power 3 Image: State St</td> <td>00002-2140000063 06.06.2014 Direct order Open EU 0002-2140000064 06.06.2014 Direct order Open EU ata Items</td>	00002-2140000063 06.06.2014 Direct order Open 0002-2140000064 06.06.2014 Direct order Open ata Items A X E Order Delivery Ite 0 Ite Item name QL P Va C D K 2 3214 Renni Power pills 2 Renni Powe. Update Po 1 1234 Update Power 3 Image: State St	00002-2140000063 06.06.2014 Direct order Open EU 0002-2140000064 06.06.2014 Direct order Open EU ata Items

- Click on
 (Show/Hide) in the search area at the top of the page to expand or contract the order search.
- Click on **(Today)** to display orders with the current date. This filter is enabled by default.
- Click on H (New Order) to add a new order.
- Double-click on an order to open the quick add area and enter the order items.
- Select an order and click on + (New Delivery) to add a new delivery on a new date for the order.
- Select an order and click on 🖼 (**Order Preview**) to generate a report containing information on the order (e.g. the items, deliveries, discount and total value).

Click on 🖨 (Print) to print the report.

The quick add area for order items is opened automatically after adding a new order or when double-clicking on an order in the overview.

All	Ove	erview Last Ord	er Special	Offer Lis	ting					
Sales 0	rganizatio	n						٦_4	Tot	tal Quanti
Item No		Item	type	+ ~						Total Val
tem name			.,,,,,							
oduct ty		+ ~ 8	irand	+ ~	Product		+ ~		Tota	al Wtd. Q
	Add more								I	'm done
ax. <u>15</u> •	records p	er page			Reset		Start Search			
< 1 - 1	5 of 15+ 🕽	>>						+ New	Delivery	× Dele
P	Item	Item name	Product type	Brand	Q	Price	D Disco	Net it	Scale	Lot No
/0	1234	Update Power pills								
,iii	3214	Renni Power pills			2					
	50000702	Display-Aufsteller S		Private label s						
	40189703	Mineralwasser	Water	Private label s						
	40189501	Helles Bier	Cookies	Private label						
	40176230	Schokoriegel	Chocolates	White label be						
	40176129	Schokolade-Osterh	Chocolates	White label be						
	123456	Schoko-Pralinen	Chocolates	White label be						
	456789	Erdbeer-Pralinen	Chocolates	White label be						
	789456	Vanille-Pralinen	Chocolates	White label be						
	9600_0	Spezialaufsteller Ge	Soft-Drinks							
	9600_0	Displayaufsteller Pr								
	9600_0	Kekse mit Schokost	Cookies	Private label s						
	9600_0	Kekse mit kleinen S	Cookies	White label s						
	9600_0	Weihnachtskekse	Cookies	Private label s						
					5	0,00		0,00 «<	\$ 1 - 15 o	f 15+ 🕽
elated I	Data									00 🖿
Recent o	rders indu	ding this item: ×								

- Click on **(Overview**) in the quick add area to return to the overview.
- Click on ± (New Order) in the quick add area to add a new order. Click on ± (New Delivery) to add a new delivery for the order.
- Click in the **Quantity** cell of an item. The dates you have defined as delivery dates are displayed as separate cells. Enter the quantity that will be delivered on each date in the appropriate cells. Once you switch to another row to confirm the quantities, the sum total entered for all delivery dates is displayed in the **Quantity** cell.

Click on **Listing** in the quick add area, to display the listings valid for the company, including those inherited from companies higher up the corporate hierarchy, see **Relationship Management** on page 247. Apply the **Last Order** filter to display the items entered in the last order. Apply the **Special Offer** filter to only display items for which a special offer is currently valid. Apply the **Sales Organization** filter to only display those items that have been assigned to a sales organization.

Note: If a **Special Offer** has been entered in the order, only special offer items added for the special offer are listed in the quick add area. You cannot add other items to the order.

 If an item has previously been ordered, the quantity ordered is displayed under Related Data. Select an order on the left to display the deliveries on the right. Click on (Show Order) to display information on the order.

Product Detailing

The "Product Detailing" phase allows you enter to information on the products that have been discussed. The number of items requiring discussion is displayed in the phase arrow.

Switching to this phase opens the quick add area for product detailing items, see Quick Add on page 164.

All product detailing items valid for this activity are listed, see Product Detailing – LSI on page 502. The PD prio and PD standard filters restrict the display to only those items defined as the being of the corresponding type.

D Items o	of <u>Visit o</u>	n 05.06.20	14 at 10:0	0						St CD
All	Ove	rview	D prio	PD standard	1					
Item No. Item name			Item type		~			٦		
Product ty		Ý	Brand		~	Product		v		
+	Add more	v								
Max. 15 ¥	records p	er page				Reset	Start Sea	irch		
										X Delete
1	Item No.	Item na	Brand	Product	Discussed	Response	Brand R	Comment	Category	Order
×0	9500_001	Anti Pain	Original dr		×					
	9500_006	HearthHea	Generic dr	Indication						
	9500_005	orangeMed	Original dr	Indication						

If you are using the closed loop marketing add-on supplied by our partner SKURA, click on **S** (**CLM**) to access your presentation on the SKURA server.

Samples

The "Samples" phase allows you to enter the samples your have distributed and those requested by the customer. Samples can only be distributed to persons; this phase is therefore only available for visits to a person.

Switching to this phase opens the quick add area for samples, >> Quick Add on page 164. Click on **Samples** to restrict the display to the items for which a valid sample configuration exists and with an **Available Quota**, >> Sample Configuration on page 492. Apply the **Special Offer** filter to only display items for which a special offer is currently valid.

Overv	view Sar	nples Special Offer							
	Busines	s Area -x- Rx							
		Date 05.06.2014							Total Issu
Item I	No.	Item type	~						10001 1000
Item na	me							Т	otal order
roduct t	Y	✓ Brand	~	Product		~			
	+ Add more								
lax. 15	✓ records p			Reset	Start S	earch			
		er page		Reset	Start S	earch		Sign	X Dele
< < 1	♥ records p	er page	Quantity is	Reset sued Quantit					
× < 1 ·	✓ records per 15 of 15+ >	er page	Quantity is						
× < 1 ·	 records period 15 of 15+ Item No. 	er page	Quantity is	sued Quantil			e Quota		
x < 1 ·	 records per 15 of 15+ Item No. 00001 	er page Item name HeartHealth Capsules 10 mg	Quantity is	sued Quantil			e Quota		
	 records per 15 of 15+ Item No. 00001 00002 	er page Item name HeartHealth Capsules 10 mg OrangeMED Capsules	Quantity is	sued Quantil			Quota		X Dele

To generate a receipt that can be signed by a doctor receiving samples:

- 1. Click on 🕮 (Sign) and select a template. A Microsoft Word document is generated containing information on the samples.
- 2. Click on $\stackrel{X}{\longrightarrow}$ at the end of the document to insert a digital signature.
- 3. Close the document.

The document is automatically linked to the activity. You can access the document in the **Complete** phase.

Note: If you are using a touch device, customers can sign the report with a stylus.

Questionnaires

The "Questionnaires" phase allows you to complete questionnaires that are valid for the current visit. This phase is unavailable if no questionnaires are valid. This number of available questionnaires is displayed in the phase arrow.

When switching to this phase, all questionnaires are listed that have been added for this activity or assigned to the company you are visiting using marketing objectives.

- The status of the questionnaire (finalized or open) is displayed in brackets.
- Double-click on a questionnaire to answer the questions, see Carrying Out a Survey on page 332.
- Click on Q (**Overview**) to return to the overview of available questionnaires.

Characteristics

The "Characteristics" phase allows you to enter or change the characteristics defined for the company and/or person you are visiting, see Characteristics on page 243.

	Characteristics	Complaint	Free Sample
E			
• Characteristics for	Prof.Dr.med. Bernd Hummel		
Group Name = Hobbies	(single selection)		
Baseball	Cooking	✓Golf	
Soccer	Travelling		

Medical Inquiry

The "Medical Inquiry" phase allows you to add medical inquiries, see Customer Service – LSI on page 796.

Switching to this phase opens the new mask for medical inquiries. If medical inquiries have already been added for this customer, these are listed.

286		iries linked to orarztpraxis		▼ or	pen 🝸 In Progress 🕻 + New Medi	
Search Result	s					
Medic	Due on	Subject	Inquiry topic	Inquiry	Status	Created on
	11.06.2014				Open	06.06.2014
I Medical In	quiry 175					
= 💉 🗸 📀						
	xander Kiefer	Person				
Please call b		Please reply				
Please call b		Please reply				
Request details	s Social					
Medical inqu		Entered on	06.06.2014	Due date to 1	1.06.2014-15:00	
Inquiry topic		Inquiry				
Status Op	en	Item No.				

- Click on
 (Show/Hide) in the search area to expand or contract the medical inquiries search.
- Click on **■** (**New Medical Inquiry**) to add a new medical inquiry.
- Click on ▼ (Open) or ▼ (In Progress) to only display medical inquiries that are open or in progress.

Complete

The "Complete" phase allows you to enter the costs associated with your visit and complete the call. You can add and edit related records (e.g. add tasks and set marketing objectives to "Completed").

			~
🗮 🖉 🧹 🖉 🔚 Call Documentation Re	eport 🕞 Complete		
Type 👗 Visit	Assigned by	Rep	Adam Aussendienst
Subject Kontaktplanung:			
Business area Rx	Purpose	Status	Scheduled
Satisfaction Indifferent	Result Activity plan	nned Run	27.08.2014 - 16:25
All day activity	Private 📃	End	27.08.2014 - 16:55
Fixed contact	Follow-up date	Event Location	Carl-Zeiss-Str. 41 b, 55129 Mainz, Germany
Valid and Open Marketing Objectiv	es a	My Open Tasks	
E Valid and Open Marketing Objectiv	Completed V		w Completed O Missed
 Valid and Open Marketing Objectiv Valid and Open Follow-Up Objectiv 	🕞 Completed 🐱		^
	🕞 Completed 🐱	+ Ne	w Gompleted OMissed
	Completed v	+ Ne	w Gompleted O Missed

 Click on (Call Documentation Report) to generate a report containing information entered for the visit (e.g. POS monitoring data, orders, visit expenses,

tasks, completed marketing objectives). Click on 🖨 (**Print**) to print the report.

Note: You can only add expenses with the **Receipt type** "Sponsoring" if the visit was added for a company, not a person.

- Click on + (New) under Call Expenses to enter the costs associated with your visit. When adding new expenses, an overview of your expenses budget is displayed.
- To complete the visit, set the **Status** to "Completed" or click on **(Complete)** to set the status automatically. The "Activities" phase is opened and you can document the next visit.

9

Occupation Reporting – LSI

The occupation reporting process allows you to document the work you have performed and submit your report for approval.

You can enter expenses per day for traveling and enter receipts as well as document the work that was performed (visit, conference etc.). Your superior (or an office rep) monitors and approves the reports you have submitted for each month.

Click on (Occupation Report) to generate an report containing all relevant informa-

tion. Click on 👼 (Print) to print the report.

Occupation Reporting Process

The opportunity reporting process consists of three phases and is available to all employees.

Select **Daily business**) > **Occupation Report** to start the process. The process is opened in phase 1 (Add).

Phase	Phase Tasks
1) Add	 Displays an overview of all work requiring submission or which has been rejected (Approval status = "New" or "Rejected"). Add new reports
2) Edit	 Enter expenses, receipts and work performed for each month
3) Check	 Displays an overview of all work which has been approved or submitted (Approval status = "Approved" or "Submitted").

Click on the arrows in the header to switch between the various phases. Doubleclick on a record in phase 1 (Add) to open the record in phase 2 (Edit).

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: The reports awaiting approval are displayed on the sale manager's start page. Double-clicking on a record opens it in phase 2 (**Edit**).

Phase 1 - Add

In this phase, you can:

- Display all work requiring submission or which has been rejected (Approval status = "New" or "Rejected").
- Add new records
- · Edit rejected reports and resubmit them

To add a new record:

- 1. Click on New Month.
- 2. Select the year and month you want to add a record for.

G Occupa Manage		R	Add ejected mor	nths: 0	Edit	Appro	Check oved months: (,	Open months: Receipts appro Receipts subm	oved: 0 €
Searc	h Occupatio	n Approva	als							~
Search	n Results «	1 - 2 of 2	> >>					Ne 📔	w Month 🔛 I	Report (HTML)
1	User	Super	Year	Month	Appro	Busin	Privat	Total	Total	Milea
	Beatrice B	Ben Boss	2013	March	New					
	Beatrice B	Ben Boss	2013	April	New					
				Sek			with			

An approval record is added and default values are entered in some of the fields, e.g. **User**, **Superior**, **Cost Center**, **Currency** and **Approval status**. A record used to store expenses is also added for each day of the month, and default values are also entered in these records, e.g. **User**, **Currency**, **Weekday**, **Workday**.

To edit a record:

1. Select the desired and record and select **Open** from the context menu. The record is opened in edit mode.

Coccupations Management	Add Rejected months: 0	Edit	Check Approved months: 0	Open months: 2 Receipts approved: 0 € Receipts submitted: S5 €
	ment 2012, September			
🗮 🖉 🗸 ⊘ 🗲 Previous				
Rep Berta Basis	(9100) Superior	Bella Boss (9100)	Back office rep	
Occupation Ap New	Comment	<u> </u>		
Year 2012	Month	September		
Business milea	Private Mileage			
Mileage Allowa	Total Flat Rates			

- 2. Enter other details, e.g. enter a **Comment**.
- 3. Save.

Note: Click on Previous to exit edit mode and close the record without saving.

Phase 2 - Edit

During this phase, you can enter details concerning the work you performed, and associated expenses and receipts.

Your work hours are entered automatically, however you can edit them. You administrator can define individual work hours for each user.

To edit the details of your work and expenses:

1. While in phase 1 (Add), double-click on a record to switch to phase 2.

The records for all days in the month are displayed. Click on \checkmark to display the search area and define additional search criteria.

C Add Coccupations Rejected months: 0								Edit Check Days entered: 3 Approved months: 0							Open months: 3 Receipts approved: 0 € Receipts submitted: 0 €		
6 s	earch Oc	cupation	s												v		
Sean	h Result	te (C C 1 -	31 0 31 3	35										AL CARD	A under		
Sear		ts << < 1 -			Holi	Den	Arri	Ove	Orr	Orr	Orr	Dec			C Update		
Sean	User Destric	Date	31 of 31 ≯ ₩e Wednes	Wo	Holi	Dep	Arri	Ove	Occ	Occ Visit	Occ Visit	Occ Visit	Tot	>> Submit	C Update Mil 12,18		
Sean //	User	Date 01.05.2	We	Wo	Holi										Mil		
Sean	User Beatric	Date 01.05.2 02.05.2	We Wednes	Wo	Holi	08:00	17:00		Visit	Visit		Visit	Tot		Hil		

2. Enter the details of the work you have performed for each applicable day.

If you enter a value in the **Occupation 1/4** cell, the same value is entered in all the **Occupation** cells. If you enter a value in the **Occupation 2/4** cell, the same value is entered in **Occupation 3/4** and **Occupation 4/4** cells etc. If you edit an existing value, only that value is changed.

3. Enable the check box in the **Overnight stay** cell should be taken into account (from the previous day to this day).

To enter expenses and receipts for a day:

1. Double-click on a the day or select **Select** from the record's context menu. Flat rates (e.g. for meals etc.) are entered automatically.

Occupations - 03.05.2013	3				
🗏 🖋 🗸 🥝 😿 🗸 🖒 Previous					
User Beatrice Base	Bac	k office rep	Supe	rior Ben Boss	
Business area OTC		Cost Center	Personnel	No.	
Total receipts 101,80	Tota	al Flat Rates	Curre	ncy EUR	
Travel Car Allowance					
Departure date 03.05.2013	Dep	parture time 08:00	Departure	city Vienna	
Arrival Date 03.05.2013	1	Arrival Time 17:00	Arrival C	City Hainburg	
Related Data					≥ × ≡
≪ < 1 - 2 of 2 > >>				li i	New Dodify List Fields
P Created on	Receipt No.	Receipt Type	Amount	VAT	Currency
10.05.2013		Travel expenses	88,90		EUR
10.05.2013		Food	12,90		EUR

- 2. Enter additional data such as the **Departure city**, whether a **Company car** or **Hired car** was used etc.
- Click on ⊕ (New) on the Receipts tab to add a new receipt. Enter the desired data.

The **Total Flat Rates** and **Total receipts** fields in the occupation record are calculated automatically and track the total expenses of each type.

4. Save the record.

Note: Click on Previous to exit edit mode and close the record without saving.

Click on **>>** (**Submit**) in the list of days to submit your entries for the month. Phase 3 (**Check**) is opened. The **Approval status** is automatically set to "Submitted". Your superior is informed on their start page that they need to approve your submission.

Note: Click on C (**Update**) in the list of days to transfer activities entered in your calendar and receipts added during the call documentation process to the report.

Phase 3 - Check

In this phase, only those records whose **Approval status** is "Approved" or "Submitted" are displayed.

0 Occupat Manage			Add Rejected mo		Edit	Appro	Check oved months: (Open months Receipts app Receipts sub	roved: 0 €
Searc	h Occupatio	n Approva	ls							~
Search	n Results «	(1-1of1)	>>							
1	User	Superi	Year	Month	Appro	Busine	Privat	Total	Total r	Mileag
	Beatrice B	Ben Boss	2013	May	Submitted	62	4		101,80	12,18

Select **Open** from a record's context menu to open it. You cannot edit submitted or approved records.

The approval status is also color-coded: green = approved, yellow = submitted, red = rejected.

Approval

Work that needs to be approved by you (as sales manager) is displayed on your start page. Double-click on a record to edit display it; the record is opened in phase 2 (**Edit**). You cannot edit the record.

Work requiring approval are also displayed in phase 3 if you have the necessary rights. You cannot edit records that require approval.

Click on (Approve) or (Reject) to approve or reject a work report. The Approval status is set to either "Approved" or "Rejected" accordingly.

You can subsequently approve records you have rejected, but cannot approve ones that have already been rejected.

Occupation Reporting Process

The opportunity reporting process consists of three phases and is available to all employees.

Select (Daily business) > Occupation Report to start the process. The process is opened in phase 1 (Add).

Phase	Phase Tasks
1) Add	 Displays an overview of all work requiring submission or which has been rejected (Approval status = "New" or "Rejected"). Add new reports
2) Edit	 Enter expenses, receipts and work performed for each month
3) Check	 Displays an overview of all work which has been approved or submitted (Approval status = "Approved" or "Submitted").

Click on the arrows in the header to switch between the various phases. Doubleclick on a record in phase 1 (Add) to open the record in phase 2 (Edit).

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: The reports awaiting approval are displayed on the sale manager's start page. Double-clicking on a record opens it in phase 2 (**Edit**).

Phase 1 - Add

In this phase, you can:

- Display all work requiring submission or which has been rejected (Approval status = "New" or "Rejected").
- Add new records
- · Edit rejected reports and resubmit them

To add a new record:

- 1. Click on New Month.
- 2. Select the year and month you want to add a record for.

0 Occupat Manage		R	Add ejected mor	nths: 0	Edît	Appr	Check oved months: (,	Open months: Receipts appr Receipts subn	oved: 0 €
Searc	h Occupatio	n Approva	als							*
Search	n Results «	1 - 2 of 2	> >>					🚺 Ne	w Month 🔛	Report (HTML)
1	User	Super	Year	Month	Appro	Busin	Privat	Total	Total	Milea
	Beatrice B	Ben Boss	2013	March	New					
	Beatrice B	Ben Boss	2013	April	New					
				Sel			with			

An approval record is added and default values are entered in some of the fields, e.g. **User**, **Superior**, **Cost Center**, **Currency** and **Approval status**. A record used to store expenses is also added for each day of the month, and default values are also entered in these records, e.g. **User**, **Currency**, **Weekday**, **Workday**.

To edit a record:

1. Select the desired and record and select **Open** from the context menu.

The record is opened in edit mode.

Coccupations Management	Add Rejected months: 0	Edit	Check Approved months: 0	Open months: 2 Receipts approved: 0 € Receipts submitted: 55 €
Occupations Manageme	ent 2012, September			
🗏 🖉 🗸 ⊘ 🗲 Previous				
Rep Berta Basis (9	2100) Superior	Bella Boss (9100)	Back office rep	
Occupation Ap New	Comment	I		
Year 2012	Month	September		
Business milea	Private Mileage			
Mileage Allowa	Total Flat Rates			

- 2. Enter other details, e.g. enter a Comment.
- 3. Save.

Note: Click on Previous to exit edit mode and close the record without saving.

Phase 2 - Edit

During this phase, you can enter details concerning the work you performed, and associated expenses and receipts.

Your work hours are entered automatically, however you can edit them. You administrator can define individual work hours for each user.

To edit the details of your work and expenses:

1. While in phase 1 (Add), double-click on a record to switch to phase 2.

The records for all days in the month are displayed. Click on \checkmark to display the search area and define additional search criteria.

Add Edit Check Open months: 3 Occupations Management Rejected months: 0 Days entered: 3 Approved months: 0 Receipts approved: 0										roved: 0 €					
_		cupation		>>										33 Submit	V Update
1	User	Date	We	Wo	Holi	Dep	Arri	Ove	Occ	0cc	Occ	0cc	Tot	Tot	Mil
	Beatric	01.05.2	Wednes			00:00	17:00	2	Visit	Visit	Visit	Visit			12,18
	Beatric	02.05.2	Thursday			00:80	17:00								
	Beatric	03.05.2	Friday			08:00	17:00		Confere	Confere	Confere	Confere			
		04.05.2				08:00	17:00	~		Confere					

2. Enter the details of the work you have performed for each applicable day.

If you enter a value in the **Occupation 1/4** cell, the same value is entered in all the **Occupation** cells. If you enter a value in the **Occupation 2/4** cell, the same value is entered in **Occupation 3/4** and **Occupation 4/4** cells etc. If you edit an existing value, only that value is changed.

3. Enable the check box in the **Overnight stay** cell should be taken into account (from the previous day to this day).

To enter expenses and receipts for a day:

1. Double-click on a the day or select **Select** from the record's context menu.

Flat rates (e.g. for meals etc.) are entered automatically.

Occupations - 03.05	.2013			
≡ 🖋 🗸 🥝 👿 🗸 🖒 Pre	vious			
User Beatrice Br	0.90	Back office rep	Superio	r <u>Ben Boss</u>
Business area OTC		Cost Center	Personnel No	L.
Total receipts 101,80		Total Flat Rates	Currency	y EUR
Travel Car Allow	vance			
Departure date 03.05.2013	1	Departure time 08:00	Departure city	y Vienna
Arrival Date 03.05.2013	1	Arrival Time 17:00	Arrival City	/ Hainburg
Related Data Receipts × ≪ < 1 - 2 of 2 > >>				► ~
Ø Created on	Receipt No.	Receipt Type	Amount VA	T Currency
10.05.2013		Travel expenses	88,90	EUR
10.05.2013		Food	12,90	EUR

- 2. Enter additional data such as the **Departure city**, whether a **Company car** or **Hired car** was used etc.
- 3. Click on \oplus (New) on the **Receipts** tab to add a new receipt. Enter the desired data.

The **Total Flat Rates** and **Total receipts** fields in the occupation record are calculated automatically and track the total expenses of each type.

4. Save the record.

Note: Click on Previous to exit edit mode and close the record without saving.

Click on **>>** (**Submit**) in the list of days to submit your entries for the month. Phase 3 (**Check**) is opened. The **Approval status** is automatically set to "Submitted". Your superior is informed on their start page that they need to approve your submission.

Note: Click on C (**Update**) in the list of days to transfer activities entered in your calendar and receipts added during the call documentation process to the report.

Phase 3 - Check

In this phase, only those records whose **Approval status** is "Approved" or "Submitted" are displayed.

0 Occupa Manage			Add Rejected mo		Edit	Appre	Check		Open months Receipts app Receipts sub	roved: 0 €
Searc	h Occupatio	n Approva	ls							~
Search	h Results < 🤆	(1-1 of 1 ≯	>>							
1	User	Superi	Year	Month	Appro	Busine	Privat	Total	Total r	Mileag
		Ben Boss	2013	May	Submitted	62			101,80	12,18

Select **Open** from a record's context menu to open it. You cannot edit submitted or approved records.

The approval status is also color-coded: green = approved, yellow = submitted, red = rejected.

Approval

Work that needs to be approved by you (as sales manager) is displayed on your start page. Double-click on a record to edit display it; the record is opened in phase 2 (**Edit**). You cannot edit the record.

Work requiring approval are also displayed in phase 3 if you have the necessary rights. You cannot edit records that require approval.

Click on (Approve) or (Reject) to approve or reject a work report. The Approval status is set to either "Approved" or "Rejected" accordingly.

You can subsequently approve records you have rejected, but cannot approve ones that have already been rejected.

10 OTC Business – LSI

Learn to manage over the counter business.

You can document (POS monitoring) the situation at a point of sale (POS) and store information on promotional material (POS material) available at the POS.

You can define conditions and special offers in order to define flexible prices, which are automatically used to price items in orders.

Point of Sale

Aurea CRM allows you to store the facings of your own products at a point of sale (POS monitoring), as well as analyze the points of sale per rep and item.

You can use the quick add function to enter items (POS monitoring items) monitored at the POS.

Select (Reference book) > POS Monitoring to display all POS monitoring records.

POS Monitoring

POS monitoring records are used to store information on the facings of your products at the point of sale **on a specific date**. You can store various information on your business partners.

POS monitoring records are added automatically as part of the Call Documentation process, and you can enter POS monitoring items there, see Call Documentation – LSI on page 432.

Note: You can add multiple visits per day and account, but only a single POS monitoring record. This means that if you visit the same account twice on the same day, and enter POS monitoring data for the firs visit, this data (including items) is also displayed for the second visit. You can edit the data from the second visit, but the data continues to be linked to the first visit.

Points of sale monitoring data is always added for an account.

To add a POS monitoring record manually:

- Switch to the activity you want to add the record to in the account's tree view. Click on ⊕ (New) on the POS Monitoring tab. The Business area and Status are entered automatically.
- 2. Enter the **Date** on which the POS was monitored.

3. Save.

POS Monitoring Items

You can add multiple POS monitoring items to a POS monitoring record in order to store the facings at a customer at the item level. You can store stock situations, facing situations and the distribution status, so as to identify weak points and to take necessary measures.

You can add POS monitoring items using the quick add function, see Quick Add on page 164.

Select **Quick Add (Items)** from the POS monitoring context menu to use the quick add function. You can also use the quick add function from within the call documentation process, see **Quick Add** on page 164.

Note: The **Last POS Monitoring** button in the quick add area displays the items in the last POS monitoring record added for the selected account.

POS Materials

Use the **POS Material** info area to document promotional material you have distributed (folders, brochures) at the POS. You can use the quick add function to enter items, see Quick Add on page 164.

Select (Reference book) > POS Materials to display all POS material records.

To add POS material records:

- 1. Switch to the **POS Material** node in the tree view of an account.
- 2. Click on \oplus (New).

C POS Material 2110000032 - 24.10.2011					
$\equiv 1 \swarrow \checkmark \oslash$					
POS Materi	POS Materi	10002-2110000032	U	ser Sally Sales	
POS Materi	Currency	EUR	Business a	IT	
Order type Direct order	Stock		D	ate 24.10.2011	
Order status Open	Items		Contact Pe	IT	
Text					
Comment					
Related Data					• • =
POS Material Item ×					
					→ Browse
The query returned no results.					

Default values are entered in some of the fields.

- 3. Enter the data.
- 4. Save.

The **POS Material No.** is entered automatically.

You can add POS material items using the quick add function, see Quick Add on page 164. Switch to the desired POS material record and select Quick Add (Items) from the context menu. You can also use the quick add function from within the call documentation process, see Call Documentation – LSI on page 432. You can also add new POS material records there.

Note: The **Value** of the POS material item is calculated automatically (= **Quantity x Price**).

The **POS Material value** in the POS material record is calculated from the sum total of all POS material items.

Listing

Use the **Listing** info area to store the items listed for an account, including information that shelf space has been paid for.

Note: You can add listings for accounts of the type "Pharmacy". The **Listing** node is displayed in the account tree of pharmacies.

The following functions are available:

- You can define the time period that the listing (and listing items) is valid for.
- Listings (and listing items) can be inherited from a parent company or wholesaler, i.e. you do not need to enter individual listings for each branch. You can however also add individual listings per branch.
- You can list the same item more than once (e.g. for items with more than one placement, such as on the counter and at the cash desk).
- You can display listed items in when using the quick add function to enter POS monitoring records and order items (Listing filter). You can store information on facings, prices and store positions related to POS monitoring records.

Note: Listing items are displayed multiple times (if present) when adding POS monitoring records, whereas they are only displayed once when adding order items.

Select (**Reference book**) > Listings to display all listings.

Select (Reference book) > Listing Items to display all listing items.

Adding Listings

You can add any number of listings per account. You can add listings manually or using the key account management features (bulk listings), see Key Account Management on page 478.

The time periods defined for listings may overlap.

Listings consist of a "header record" that contains data relating to the entire listing (e.g. the name and valid time period), and item records that contain data concerning the individual items in the listing.

You can use the quick add function to enter listing items, see Quick Add on page 164. If the same item is placed in different locations, duplicate the record and enter a **Placement** per record.

To add a listing manually:

- 1. Switch to the desired account.
- 2. Switch to the Listings node in the tree and click on \oplus (New).
- 3. Enter a name for the listing and define the time period the listing is valid for in the **Valid from** and **Valid to** fields. If you do not enter a date in the **Valid from** field, the listing is valid without a start date (i.e. it also applies to the past).

Note: The time period the listing is valid for is automatically transferred to all the listing's items. You can however change the time period entered in listing items manually, e.g. to determine that a specific item is not currently listed.

To add listing items:

- 1. Switch to the desired listing (Listings node in the tree view of an account).
- 2. Click on \oplus (Quick Add) to open the quick add area.
- 3. Select a **Store type** to determine that a listing item applies to a specific type of store (small outlet, flagship store etc.). If you do not enter a **Store type**, the listing item applies to the current account and all accounts that inherit the listing from the current account.
- Enter information on the item's placement in the Facings, Shelf position etc. fields.

Note: For further information on how listings are inherited, contact your administrator.

Point of Sale

Aurea CRM allows you to store the facings of your own products at a point of sale (POS monitoring), as well as analyze the points of sale per rep and item.

You can use the quick add function to enter items (POS monitoring items) monitored at the POS.

Select (Reference book) > POS Monitoring to display all POS monitoring records.

POS Monitoring

POS monitoring records are used to store information on the facings of your products at the point of sale **on a specific date**. You can store various information on your business partners.

POS monitoring records are added automatically as part of the Call Documentation process, and you can enter POS monitoring items there, >> Call Documentation – LSI on page 432.

Note: You can add multiple visits per day and account, but only a single POS monitoring record. This means that if you visit the same account twice on the same day, and enter POS monitoring data for the firs visit, this data (including items) is also displayed for the second visit. You can edit the data from the second visit, but the data continues to be linked to the first visit.

Points of sale monitoring data is always added for an account.

To add a POS monitoring record manually:

- Switch to the activity you want to add the record to in the account's tree view. Click on ⊕ (New) on the POS Monitoring tab. The Business area and Status are entered automatically.
- 2. Enter the **Date** on which the POS was monitored.

3. Save.

POS Monitoring Items

You can add multiple POS monitoring items to a POS monitoring record in order to store the facings at a customer at the item level. You can store stock situations, facing situations and the distribution status, so as to identify weak points and to take necessary measures.

You can add POS monitoring items using the quick add function, >> Quick Add on page 164.

Select **Quick Add (Items)** from the POS monitoring's context menu to use the quick add function. You can also use the quick add function from within the call documentation process, >> Quick Add on page 164.

Note: The **Last POS Monitoring** button in the quick add area displays the items in the last POS monitoring record added for the selected account.

POS Materials

Use the **POS Material** info area to document promotional material you have distributed (folders, brochures) at the POS. You can use the quick add function to enter items, >> Quick Add on page 164.

Select (Reference book) > POS Materials to display all POS material records.

To add POS material records:

- 1. Switch to the **POS Material** node in the tree view of an account.
- 2. Click on \oplus (New).

© POS Material 2110000032	- 24.10.201	1			
≡ 💉 🗸 ⊘					
POS Materi	POS Materi	10002-2110000032	User	Sally Sales	
POS Materi	Currency	EUR	Business ar		
Order type Direct order	Stock		Date	24.10.2011	
Order status Open	Items		Contact Per		
Text					
Comment					
Related Data					• • =
POS Material Item ×					
					→ Browse
	The quer	y returned no results.			

Default values are entered in some of the fields.

- **3.** Enter the data.
- 4. Save.

The **POS Material No.** is entered automatically.

You can add POS material items using the quick add function, >> Quick Add on page 164. Switch to the desired POS material record and select Quick Add (Items) from the context menu. You can also use the quick add function from within the call documentation process, >> Call Documentation – LSI on page 432. You can also add new POS material records there.

Note: The **Value** of the POS material item is calculated automatically (= **Quantity x Price**).

The **POS Material value** in the POS material record is calculated from the sum total of all POS material items.

Listing

Use the **Listing** info area to store the items listed for an account, including information that shelf space has been paid for.

Note: You can add listings for accounts of the type "Pharmacy". The **Listing** node is displayed in the account tree of pharmacies.

The following functions are available:

- You can define the time period that the listing (and listing items) is valid for.
- Listings (and listing items) can be inherited from a parent company or wholesaler, i.e. you do not need to enter individual listings for each branch. You can however also add individual listings per branch.
- You can list the same item more than once (e.g. for items with more than one placement, such as on the counter and at the cash desk).
- You can display listed items in when using the quick add function to enter POS monitoring records and order items (**Listing** filter). You can store information on facings, prices and store positions related to POS monitoring records.

Note: Listing items are displayed multiple times (if present) when adding POS monitoring records, whereas they are only displayed once when adding order items.

Select (Reference book) > Listings to display all listings.

Select (Reference book) > Listing Items to display all listing items.

Adding Listings

You can add any number of listings per account. You can add listings manually or using the key account management features (bulk listings), >> Key Account Management on page 478.

The time periods defined for listings may overlap.

Listings consist of a "header record" that contains data relating to the entire listing (e.g. the name and valid time period), and item records that contain data concerning the individual items in the listing.

You can use the quick add function to enter listing items, >> Quick Add on page 164. If the same item is placed in different locations, duplicate the record and enter a **Placement** per record. To add a listing manually:

- 1. Switch to the desired account.
- **2.** Switch to the **Listings** node in the tree and click on \oplus (**New**).
- 3. Enter a name for the listing and define the time period the listing is valid for in the **Valid from** and **Valid to** fields. If you do not enter a date in the **Valid from** field, the listing is valid without a start date (i.e. it also applies to the past).

Note: The time period the listing is valid for is automatically transferred to all the listing's items. You can however change the time period entered in listing items manually, e.g. to determine that a specific item is not currently listed.

To add listing items:

- 1. Switch to the desired listing (Listings node in the tree view of an account).
- 2. Click on \oplus (Quick Add) to open the quick add area.
- 3. Select a Store type to determine that a listing item applies to a specific type of store (small outlet, flagship store etc.). If you do not enter a Store type, the listing item applies to the current account and all accounts that inherit the listing from the current account.
- Enter information on the item's placement in the Facings, Shelf position etc. fields.

Note: For further information on how listings are inherited, contact your administrator.

11 Sales Cycle – LSI

A sales cycle defines a time period during which a specific item is sold and/or during which specific targets (KPI) should be achieved for a specific target group.

A sales cycle can consist of several phases. For example, a rep may first prepare outlets for the sale of an item, then the item is promoted during the marketing phase before the item is put on display and made available for sale in the final phase.

Example:An ice cream manufacturer offers single ice creams, multipacks, tubs and desserts throughout the year. The target group for multipacks is the same throughout the year, but the target group for single ice creams varies. During the summer months, more single ice creams are sold by supermarkets and kiosks and more promotional material is available during this time. Two sales cycles are thus defined (summer and winter) with different target groups, KPIs and requirements.

The sales manager of back office staff define a sales cycle, including targets for reps, special offers that apply to items etc. Sales cycles can overlap.

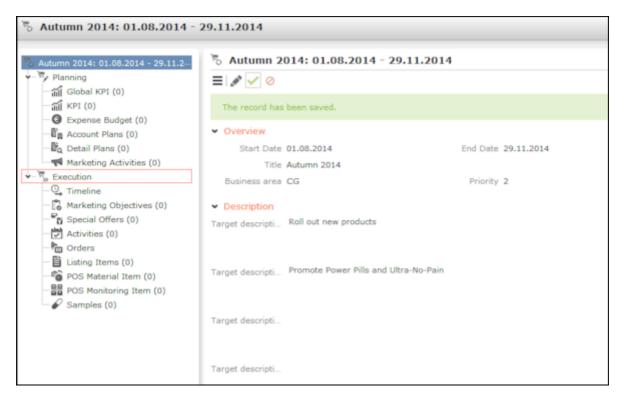
Marketing activities can be assigned to a sales cycle. Each marketing activity includes the target group for a specific activity in the sales cycle (e.g. sending brochures). Special offers including items (and possible conditions) that are relevant to the sales cycle can be linked to each marketing activity. Items are defined in the item master info area, and can then be added as special offer items. The quick add flags (e.g. Order) need to be enabled in the item master. For further details, see Special Offers on page 421.

A campaign can consist of several marketing activities, and thus may include multiple sales cycles. Individual marketing activities in a campaign can target different audiences at different times, but still be related to the same sales cycle. Marketing objectives generated within the scope of a sales cycle are assigned to marketing activities.

Adding and Editing Sales Cycles

To add a sales cycle:

- 1. Select **I** (Sales) > Sales Cycles.
- 2. Click on \oplus (New).
- 3. Enter a Start Date, End Date and Priority.
- 4. Enter additional information, such as the **Title** (name of the sales cycle) and **Business area**.
- 5. Save the record.



- When opening a sales cycle, all records related to the sales cycle (activities, special offers, expense budget) are displayed. Sales cycles are divided into three sections (planning, execution and analysis).
- You can enter a **Sales cycle** in targets (e.g. global KPI, KPI, expense budgets, account plant, marketing activities). These targets then apply to that specific sales cycle. If you add a details plan to an account plan, the sales plan entered in the account plan is automatically transferred to the details plan.
- If you add POS monitoring items, order items, POS material items, samples, activities and marketing objectives during a sales cycle's validity period, the currently valid sales cycle is entered automatically, >> Assigning Sales Cycles on page 476.
- Click on Timeline under Execution in the tree to display the sales cycle's timeline, including information on activities, special offers, POS material items etc., >> Timeline on page 99.
- You can access an analyses from the Marketing Objectives and Orders nodes (Analysis tab), >> Analyses on page 154.
 - Marketing objectives: open and completed marketing objectives
 - Orders: Number of orders, number of order item and sum total of the net order value grouped by item type

Note: If CRM.intelligence is installed, you can also access it from a node in the sales cycle tree.

Assigning Sales Cycles

If you enter a sales cycle in a marketing activity or special offer, the sales cycle is automatically linked to records that are linked to the marketing activity or special offer (e.g. activities, order items).

Your administrator can determine that a sales cycle is automatically entered in new records based on the date and business area in the new record.

 If a marketing activity is assigned to a sales cycle, and linked to a special offer, activity or marketing objective, the sales cycle entered in the marketing activity is entered in the linked record.

Note: The sales cycle's duration is transferred to special offers, but can be edited. If a special offer is added to a sales cycle and linked to a marketing activity, the sales cycle entered in the marketing activity is entered in the special offer.

• If a sample, POS material item, listing item, POS monitoring item or order item is linked to a **special offer**, the sales cycle entered in the special offer is transferred to the linked record.

Note: If the link to the marketing activity or special offer is changed, the sales cycle entered in the linked records is overwritten (or **deleted** if the newly linked marketing activity or special offer is not linked to a sales cycle). If the sales cycle in the marketing activity or special offer is changed, this change is not applied to linked records.

- When adding POS monitoring items, order item, POS material items, samples, activities and marketing objectives, these records are linked to a sales cycle (if present) based on the **date and business area**.
 - The date entered in the record must be within the sale cycle's validity period and the business area (of the rep) must match the business area entered in the sales cycle. If the rep is not assigned to a business area, the system searches for sales drives that are not assigned to a business area.
 - If several sales drives are active, the system searches for the sales drive with the latest start date. If several sales drives begin on the latest start date, the sales drive with the highest priority is used.

Note: The business area is determined based on the business area assigned to the rep entered in the record (and defined in the **Rep Additional Info** area). Your administrator can determine that sales cycles are not linked automatically. For further information contact your administrator. When merging accounts and persons, sales cycles are not updated in linked records. When defining recurring activities, the sales cycle is not copied from the main activity, but is calculated for each activity based on the activity's date.

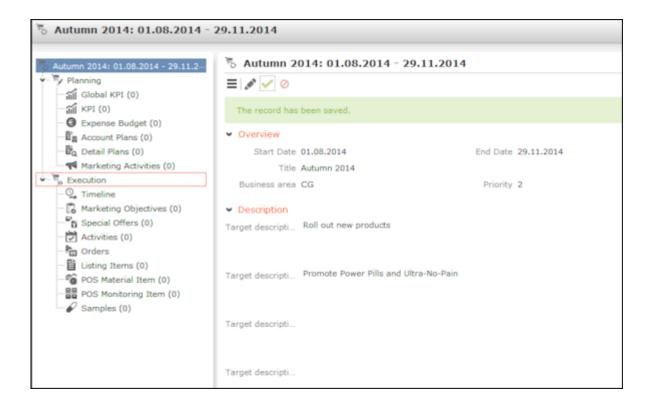
If a sample, POS monitoring item or order item is entered in the quick add area (**Special Offer** filter), the sales cycle entered in the special offer is transferred to the linked record.

Note: The quick add area is available for orders where a special offer has been entered that is linked to a sales cycle, for example. If configured by your administrator, the **Special Offer** filter is displayed in the quick add area. All items and their prices and discounts entered in the sales cycle are listed.

Adding and Editing Sales Cycles

To add a sales cycle:

- 1. Select **Sales** (Sales) > Sales Cycles.
- 2. Click on \oplus (New).
- 3. Enter a Start Date, End Date and Priority.
- 4. Enter additional information, such as the **Title** (name of the sales cycle) and **Business area**.
- 5. Save the record.



- When opening a sales cycle, all records related to the sales cycle (activities, special offers, expense budget) are displayed. Sales cycles are divided into three sections (planning, execution and analysis).
- You can enter a **Sales cycle** in targets (e.g. global KPI, KPI, expense budgets, account plant, marketing activities). These targets then apply to that specific sales cycle. If you add a details plan to an account plan, the sales plan entered in the account plan is automatically transferred to the details plan.
- If you add POS monitoring items, order items, POS material items, samples, activities and marketing objectives during a sales cycle's validity period, the currently valid sales cycle is entered automatically, >> Assigning Sales Cycles on page 476.
- Click on Timeline under Execution in the tree to display the sales cycle's timeline, including information on activities, special offers, POS material items etc., >> Timeline on page 99.
- You can access an analyses from the **Marketing Objectives** and **Orders** nodes (**Analysis** tab), >> **Analyses** on page 154.
 - Marketing objectives: open and completed marketing objectives
 - Orders: Number of orders, number of order item and sum total of the net order value grouped by item type

Note: If CRM.intelligence is installed, you can also access it from a node in the sales cycle tree.

Assigning Sales Cycles

If you enter a sales cycle in a marketing activity or special offer, the sales cycle is automatically linked to records that are linked to the marketing activity or special offer (e.g. activities, order items).

Your administrator can determine that a sales cycle is automatically entered in new records based on the date and business area in the new record.

• If a **marketing activity** is assigned to a sales cycle, and linked to a special offer, activity or marketing objective, the sales cycle entered in the marketing activity is entered in the linked record.

Note: The sales cycle's duration is transferred to special offers, but can be edited. If a special offer is added to a sales cycle and linked to a marketing activity, the sales cycle entered in the marketing activity is entered in the special offer.

• If a sample, POS material item, listing item, POS monitoring item or order item is linked to a **special offer**, the sales cycle entered in the special offer is transferred to the linked record.

Note: If the link to the marketing activity or special offer is changed, the sales cycle entered in the linked records is overwritten (or **deleted** if the newly linked marketing activity or special offer is not linked to a sales cycle). If the sales cycle in the marketing activity or special offer is changed, this change is not applied to linked records.

- When adding POS monitoring items, order item, POS material items, samples, activities and marketing objectives, these records are linked to a sales cycle (if present) based on the **date and business area**.
 - The date entered in the record must be within the sale cycle's validity period and the business area (of the rep) must match the business area entered in the sales cycle. If the rep is not assigned to a business area, the system searches for sales drives that are not assigned to a business area.
 - If several sales drives are active, the system searches for the sales drive with the latest start date. If several sales drives begin on the latest start date, the sales drive with the highest priority is used.

Note: The business area is determined based on the business area assigned to the rep entered in the record (and defined in the **Rep Additional Info** area). Your administrator can determine that sales cycles are not linked automatically. For further information contact your administrator. When merging accounts and persons, sales cycles are not updated in linked records. When defining recurring activities, the sales cycle is not copied from the main activity, but is calculated for each activity based on the activity's date.

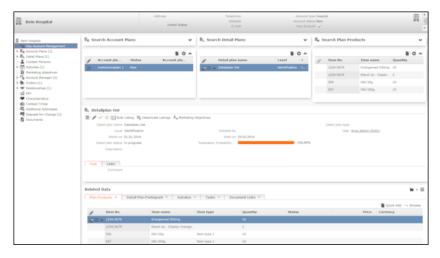
If a sample, POS monitoring item or order item is entered in the quick add area (**Special Offer** filter), the sales cycle entered in the special offer is transferred to the linked record.

Note: The quick add area is available for orders where a special offer has been entered that is linked to a sales cycle, for example. If configured by your administrator, the **Special Offer** filter is displayed in the quick add area. All items and their prices and discounts entered in the sales cycle are listed.

12 Key Account Management

The key account management functions provide access to processes relevant to key accounts (e.g. major customers).

These functions are only available to accounts where the **Key Account** check box is enabled. If this is the case, the **Key Account Management** node is displayed in the account's tree view.

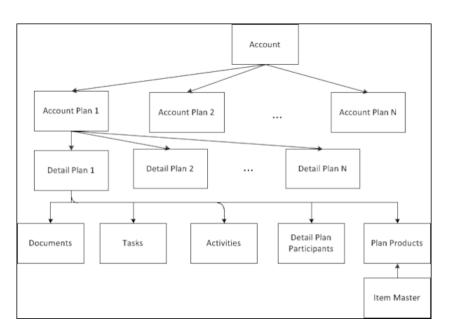


The **Key Account Management** area provides you with an overview of the account plans for an account, including associated detail plans and products.

You can:

- Add account plans, see Account Plans on page 479.
- Define detail plans and products, see Detail Plans and Detail Plan Products on page 481.
- Display an overview of all relevant detail plans in a timeline, see Timeline on page 99.
- Apply mass updates to listings, see Bulk Listing on page 482 and Removing Items from Listings on page 484.
- Add marketing objectives, see Adding Marketing Objectives on page 486.

The following diagram illustrates the key account management hierarchy.



Depending on the corporate structure of your customers, you may have several account plans, e.g. one for each sales cycle with several detail plans including products for each account plan. Detail plans allow you to plan out your approach in detail.

Select (Sales) > Account Plans or Detail Plans to display an overview of all account plans or detail plans added for all accounts.

Select (Reporting) > KAM Calendar to display an overview of all marketing activities, see Key Account Management Calendar on page 488.

Account Plans

You can add account plans including detail plans to accounts marked as key accounts.

To add an account plan:

- 1. Switch to the desired account.
- 2. In the tree view of the account:
 - Switch to the **Key Account Management** node and click on ⊕ (New) in the list of account plans.

or

- Click on the Account Plans node in the tree and then click on \oplus (New).
- 3. Enter data such as the Account plan name, Currency, Budget and a time period.
- 4. Save the record.

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5. Use the **Detail Plans** tab under **Related Data** to add detail plans to the account plan, see **Detail Plans and Detail Plan Products** on page 481. You can also add document links, see **Document Management** on page 336.

Note: Select **Timeline** from the account plan's context menu to open the timeline and display an overview of all detail plans added to the account plan, see **Timeline** on page 99.If you enter a sales cycle in an account plan and add a details plan, the sales cycle entered in the account plan is automatically transferred to the details plan.

Detail Plans and Detail Plan Products

Detail plans allow you to plan your strategies for key accounts (e.g. special offers, new product listings).

To add a detail plan:

- 1. Switch to the desired account.
- 2. In the tree view of the account:
 - Switch to the **Key Account Management** node, select the desired account plan from the list and click on \oplus (**New**) in the list of detail plans.

or

- Click on the Account Plans node and select the account plan you wish to add the detail plan to. Click on ⊕ (New) on the Detail Plans tab, see Account Plans on page 479.
- 3. Enter data such as the **Detail plan name** and a time period.
- 4. Save the record.

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- 5. You can add further data to the detail plan from the tabs under **Related Data**.
 - Plan Products : Click on \oplus (Quick Add) to add items in the item master as products to the detail plan, see Quick Add on page 164. Detail plans can be used

to define listings quickly for multiple items and are relevant to marketing objectives, see Bulk Listing on page 482, Removing Items from Listings on page 484 and Adding Marketing Objectives on page 486.

- Detail Plan Participants, see Participants and Roles on page 95.
- Activities, see Activities on page 285.
- Tasks, see Tasks on page 303.
- Document Links, see Document Management on page 336.

Note: If a sales cycle is entered in the in the account plan, it is transferred to the details plan. The validity period of the details plan does not need to be the same as that of the sales cycle.

Bulk Listing

Use the bulk listing function to assign products to a details plan and to automatically generate and update listings and listing items for several accounts

For further details, see Detail Plans and Detail Plan Products on page 481 and Listing on page 470.

To access the bulk listing function:

- 1. Switch to the desired detail plan (e.g. from the **Key Account Management** node in the tree view of the desired account, see Detail Plans and Detail Plan Products on page 481.
- 2. Click on 🗄 (Bulk Listing).

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3. Select the products you wish to assign to the listing (you can select multiple records, see Editing Multiple Records in the List Simultaneously).

You can add and edit detail plan products in the quick add area, see Quick Add on page 164.

4. Enter the **Store position** of the products. If the same product has multiple

placements, click on **S** (**Duplicate Record**) in the quick add area to duplicate the record, and enter the next placement.

- 5. Select the target account(s). You can select multiple entries in the list.
 - **Target Accounts** tab: This tab lists all accounts that are related to the account the detail plan was added for (the type of relationship depends on your configuration), see Relationship Management on page 247.
 - Search tab: Use this tab to search for a particular account.
- 6. Enter the Listing name, Listing status and a validity period in the Default Values Listing area.
- 7. Click on Start Bulk Listing.

If no matching listing records exist, a listing record is added automatically for each selected account using the default values you specified. The selected products are added to these listings as listing items.

If matching listing records already exist, the selected products are either added to the listing as new listing items or existing listing items for the selected products are updated.

The validity period in the listing items added by the system is the same as the validity period of the listing.

A message is displayed with an overview of the number of new and updated records.

Click on v in the **History** to display further details. Click on a listing in the **History Details** to display it.

Removing Items from Listings

You can deactivate a listing item in a currently valid listing, or change the listing item's validity period.

To remove multiple items from a listing:

- 1. Switch to the desired detail plan (e.g. from the **Key Account Management** node in the tree view of the desired account), see **Detail Plans and Detail Plan Products** on page 481.
- 2. Click on 🗄 (Deactivate Listings).

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	Einlistung	13.08.2014	13:05	Arno Admin (9200)				

- 3. Select the listing items whose validity period you want to change from the search results (you can select multiple entries in the list, see Editing Multiple Records in the List Simultaneously).
- 4. Select the target account(s).
 - **Target Accounts** tab: This tab lists all accounts where a relationship of the type "has channel of distribution" exists with the account the detail plan was added for, see Relationship Management on page 247.
 - Search tab: Use this tab to search for a particular account.
- 5. Click on Start Search under Search Listing Items (on the right).

The listing items defined for the selected accounts are listed under Listing Items.

The **Valid** filter is enabled by default and only currently valid listing items are displayed (i.e. where the current date is between the dates in the **Valid from** and **Valid to** fields).

- 6. Select the listing items whose validity period you want to change.
- 7. Enter a new Valid to date under Default Values for Deactivate Listing.
- 8. Click on **Deactivate Listing** to change the validity period. This button is only active if you have selected at least one listing item.

A message is displayed with information on the updated records.

Click on • (**Mini details**) under **History** to display further details on listing items. Click on a listing item under **History Details** to view the item.

Adding Marketing Objectives

Marketing objectives allow you (as key account manager) to inform sales reps of approved special offers and orders for specific customers, and to supply reps with general information.

Accounts can be part of hierarchies and networks, see **Relationship Management** on page 247. You can use you customers' relationship hierarchies and networks to add marketing objectives.

To add a marketing objective:

- Switch to the desired detail plan (e.g. from the Key Account Management node in the tree view of the desired account), see Detail Plans and Detail Plan Products on page 481.
- 2. Click on 🛱 (Marketing Objectives).
- 3. Select the detail plan products you want to add a special offer for (you can select multiple entries in the list, see Editing Multiple Records in the List Simultaneously). The Add Special Offer check box is automatically enabled. If this check box is enabled, a special offer is created and linked to the marketing objective. You can disable this check box.

You do not need to select any products if you do not with to add special offers.

You can add and edit detail plan products in the quick add area, see Quick Add on page 164.

- 4. Select the accounts. You can select multiple entries in the list.
 - Accounts tab: This tab lists all accounts that are related to the account the detail plan was added for (the type of relationship depends on your configuration).
 - Search tab: Use this tab to search for a particular account.
- 5. Enter the details of the marketing activity in the **Default Values Marketing Activity** area.
- 6. Enter the details of the marketing objective in the **Default Values Marketing Objective** area.

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Note: Depending on your configuration, several fields are automatically filled with default values.

7. Click on Create Marketing Objectives.

A message is displayed with an overview of the number of new and updated records.

Click on v in the **History** to display further details. Click on a link in the **History Details** to display it.

The business logic defined for campaigns and marketing activities is used to create marketing objectives, see Campaigns and Marketing Activities on page 516.

Marketing activities including target groups and marketing objectives are added for the selected accounts. These marketing objectives are linked to any special offers created. The selected products are added to these special offers as special offer items. A suitable execution record is also added for each marketing activity. If matching marketing activity records linked to a special offer already exist, the selected products are either added as new special offer items or existing special offer items for the selected products are updated. The execution records stored for existing marketing activities are also updated.

Key Account Management Calendar

The key account management calendar provides you with an overview of all marketing activities

For further details, see Marketing Activities on page 521.

Select (Marketing) > KAM Calendar to open the key account management calendar. The number of marketing objectives defined for each marketing activity is displayed as well as the number of objectives that have been completed. The extent to which the marketing objectives have been completed is displayed as a percentage.

Click on a marketing activity to open it in a new tab.

The marketing objectives associated with the marketing activity are listed on the **Marketing Objectives** tab under **Related Data**.

Click on 🖨 (**Print**) to print the key account management calendar.

13 Opinion Leaders and Speaker Management – LSI

You can flag persons in Aurea CRM as opinion leaders and enter information on speakers.

To flag the person as an opinion leader or speaker, switch to the **Opinion leader / speaker** tab when viewing the desired person:

- Enable the Opinion leader check box to flag the person as an opinion leader.
- Enable the Speaker check box to flag the person as a speaker. Refresh the person tree (Au) > Refresh Working Area).
 - The **Speaker Profile** node is then displayed in the person tree. You can enter information on the speaker's education, lectures and publications here.

Switch to the **Consultancy Agreements** node to enter details on contracts agreed with the person (e.g. fees).

14

Sample Management – LSI

You can define samples in the item master and document samples issued to customers (e.g. doctors).

You can manage medication samples and medical technology products.

You can store information on samples you have issued and samples you still need to send in the call management process, see Call Documentation – LSI on page 432.

- You can define the launch phase per item and business area and determine how many samples (i.e. the quota) may be distributed during and after the launch phase, see Sample Configuration on page 492. The end of the launch phase is the latest end date in all an item's sample configuration records.
- Use the Sample info area to store how many samples of an item have been issued to a person and how many still need to be sent, see Issuing and Sending Samples on page 493. The quick add function is available for entering samples, see Quick Add on page 164.

Note: You can access the quick add area for samples from the Activity info area (e.g. in the tree view for persons). The samples entered there are linked to the activity record.

• Select (Reference book) > Samples/Year to display an overview of all samples

you have issued to a person over the course of a year. Select **EE**(Reference **book > Samples** to display a list of all samples that have been issued or still need be sent.

Sample Configuration

Use the **Sample Configuration** info area to that an item can be distributed as samples.

For each item and business area, you can define the launch phase and the amount of samples that can be distributed per person during and after this phase, or whether the item is not subject to quotas.

The sample configuration applies to all reps assigned to the corresponding business area.

To add a sample configuration record:

- 1. Select **Master data**) > Item Master, see Item Master on page 409.
- 2. Click on the desired item.

- **3.** Switch to the **Sample Configuration** tab and click on \oplus (**New**).
- 4. Enter the desired **Business Area**.
- 5. Enter the following details:
 - If the **Allocated** field is **disabled**, there are no restrictions imposed on the number of items that can be distributed to persons as samples. ('*' is displayed for these items in the **Quota** column in the quick add area.)
 - Enable the **Allocated** field to determine that the item is subject to a quota. Use the remaining fields in the info area to determine the quota and duration of the launch phase.
 - Launch start: Start of the launch phase
 - Launch end: End of the launch phase
 - Units during launch: Quota that can be issued per person and year during the launch phase.
 - Units after launch: Quota that can be issued per person and year after the launch phase.
 - The quotas defined here are compared to the sum total in the **Samples/Year** info area when issuing samples.
- 6. Save.

You can define different launch phases and quotas for each business area.

When entering samples, the system checks the number of items currently available (based on the current date) to be distributed as samples based on the information in the **Sample Configuration** and **Samples/Year** info areas, see Issuing and Sending Samples on page 493.

Note: For further information on date-based quotas and persons not subject to quotas, contact your administrator.

Issuing and Sending Samples

You can enter the samples you have issued or still need to send either directly or using the quick add function, see Quick Add on page 164.

You can access the **quick add** function for samples from an activity added for a person. You can also use the quick add function from within the call documentation process, see Call Documentation – LSI on page 432.

In order to be able to enter an item as a sample, the following conditions need to be met:

- The date of the activity must be either during or after the launch phase (except for items that are not subject to quotas).
- A sample configuration record needs to be present for the rep's **Business Area**, see **Sample Configuration** on page 492.

Enter the **Quantity issued** and the amount that you still need to (**Order Quantity**).

The Lot No. and current quantity are displayed in the quick add area.

The available quota (**Quota**) field is calculated from the maximum available quota minus the quantity of samples that still need to be sent. If a person or sample item is not subject to a quota, '*' is displayed in the **Quota** field.

Sample Configuration

Use the **Sample Configuration** info area to that an item can be distributed as samples.

For each item and business area, you can define the launch phase and the amount of samples that can be distributed per person during and after this phase, or whether the item is not subject to quotas.

The sample configuration applies to all reps assigned to the corresponding business area.

To add a sample configuration record:

- 1. Select **Master data**) > **Item Master**, see **Item Master** on page 409.
- 2. Click on the desired item.
- **3.** Switch to the **Sample Configuration** tab and click on \oplus (**New**).
- 4. Enter the desired Business Area.
- 5. Enter the following details:
 - If the **Allocated** field is **disabled**, there are no restrictions imposed on the number of items that can be distributed to persons as samples. ('*' is displayed for these items in the **Quota** column in the quick add area.)
 - Enable the **Allocated** field to determine that the item is subject to a quota. Use the remaining fields in the info area to determine the quota and duration of the launch phase.
 - Launch start: Start of the launch phase
 - Launch end: End of the launch phase
 - Units during launch: Quota that can be issued per person and year during the launch phase.
 - Units after launch: Quota that can be issued per person and year after the launch phase.
 - The quotas defined here are compared to the sum total in the **Samples/Year** info area when issuing samples.
- 6. Save.

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Note: For further information on date-based quotas and persons not subject to quotas, contact your administrator.

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- The date of the activity must be either during or after the launch phase (except for items that are not subject to quotas).
- A sample configuration record needs to be present for the rep's **Business Area**, see **Sample Configuration** on page 492.

Enter the Quantity issued and the amount that you still need to (Order Quantity).

The Lot No. and current quantity are displayed in the quick add area.

The available quota (**Quota**) field is calculated from the maximum available quota minus the quantity of samples that still need to be sent. If a person or sample item is not subject to a quota, '*' is displayed in the **Quota** field.

15

Territory Management – LSI

Learn about territory management.

You can assign sales reps and account managers to accounts and persons in a range of functions.

Select (Settings) > Maintenance > Territory Management to access the territory management settings.

Select **Master Data) > Account Manager** to display an overview of all assigned account managers.

All account managers assigned to an account and persons linked to the account are displayed in the **Account Manager** node in the account tree (**Account-related** and **Person-related** tabs).

Account managers assigned to a person are displayed in the person tree: **Roles** node > **desired person** > **Related Data: Account Manager** tab.

Account managers assigned to a persons are displayed in the account tree: **Persons** node > **desired contact person** > **Account Manager** node.

Note: The data you can access depends on your role. By default, sales reps can only view accounts that they are responsible for in the search, for example. For more details, contact your administrator.

Adding Account Managers Manually

You manually or automatically add account managers in the **Account Manager** info area, see Allocating Account Managers on page 499.

To add account managers manually:

- Switch to the desired account (account tree > Account Manager node, Account-related tab) or person (person tree > Role node > desired role > Related Data, Account Manager tab).
- 2. Click on \oplus (New).

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3. Enter the Account Managers. You can also enter a Region Manager and Sales Manager.

The **Manual** field is automatically enabled for records that are added manually. If an account manager record is added automatically, the **Manual** field is enabled automatically if the record is subsequently edited.

Note: You need appropriate access rights to be able to add account managers manually.

Allocating Account Managers

As a rule, account managers are allocated based on a customer's address. Reps area assigned to accounts based on the geographic settings (**Country** field and postal code range) defined in the **Allocation** info area. The **From Micro brick No.** and **To Micro brick No.** fields can also be used. You can add multiple allocation records with different account managers for the same postal code range but with different microbrick numbers. The microbrick number is compared to the **MicroBrick No.** entered in the account. If a microbrick number is entered for an account, the postal code is **ignored** even if no allocation record is found for the microbrick number.

Select (Settings) > Maintenance > Territory Management and use the Allocation and Allocation Configuration tab to define how account managers are allocated.

Use the **Allocation Configuration** tab to define business areas for accounts and persons based on the account type, specialty and allocation code.

Use the **Allocation** tab to assign account managers to accounts and persons based on the business area and address (e.g. country, postal code).

Note: Account managers can only be assigned to accounts and persons linked to an account. The specialty and allocation code apply to persons.

Allocation Configuration

Use the **Allocation Configuration** info area to allocate accounts and persons to a business area. Use the **Specialty** field to further limit the allocation for persons (e.g. "Practice" account type and "Sports doctor" as specialty).

Account managers are assigned to accounts instead of persons if only the **Business Area** and **Account type** are entered in the business line. If you also enter data in the **Specialty** or **Allocation Code** fields the account manager is allocated to persons.

Allocation

Use the **Allocation** info area to determine which account managers are responsible for which countries and business areas. You can also define postal code and Micro-Brick ranges.

You can further subdivide MicroBrick and postal code ranges. In this case, the smallest range is used.

Example: Sam Shine is responsible for the post codes from "75001-75020", but Warren Teed is responsible for "75010-75013". Consequently, an account with the post code "75012" is assigned to Warren Teed.

The geographic MicroBrick number allocations take precedence over postal codes.

You can also allocate up to 8 reps to an account.

Allocating Reps

Account managers can be allocated automatically in several ways:

- Click on the Allocate button on the Allocation Configuration tab in the Territory Management area. Account managers are then assigned to accounts and persons according to the defined settings.
- By adding new accounts and persons
- Accounts Whenever an account or person is added or edited (the Account type, address and MicroBrick fields in an account record, the Specialty and Allocation code fields in a person record).

Note: You can enter more than one account type for accounts or specialties for persons. As a result, multiple account manager records are added. Account managers added or edited manually (i.e. the **Manual** field is enabled) are not updated, see Adding Account Managers Manually on page 497. For more information, contact your administrator.

The system checks the following:

- Whether a record exists in the Allocation Configuration info area where the Account type and Specialty (or Allocation code) fields are the same as in the person or account record.
- Whether a record exists in the **Allocation** info area for the same country and where the MicroBrick or postal code ranges match the data entered for the account or person.
- Whether the business area in the allocation record matches the business area in the allocation configuration record.

If **all three of the above conditions** are met by an account or persons, an account manager record is automatically added using the rep entered in the allocation record for the business area.

If you restructure your sales team, you only need to update the entries in the Allocation and Allocation Configuration info areas, and click on Allocate in the Allocation Configuration info area to reallocate the account managers. The account managers are updated.

You can also add or delete records to change the allocation criteria or add territories.

Several account manager records can be added for an account or person, for example if several specialties are entered for a person, meaning that reps from various business areas may be required.

Adding Account Managers Manually

You manually or automatically add account managers in the **Account Manager** info area, see Allocating Account Managers on page 499.

To add account managers manually:

- Switch to the desired account (account tree > Account Manager node, Account-related tab) or person (person tree > Role node > desired role > Related Data, Account Manager tab).
- 2. Click on \oplus (New).

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Note: Account managers can only be assigned to accounts and persons linked to an account. The specialty and allocation code apply to persons.

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You can further subdivide MicroBrick and postal code ranges. In this case, the smallest range is used.

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For more information, contact your administrator.

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You can also add or delete records to change the allocation criteria or add territories.

Several account manager records can be added for an account or person, for example if several specialties are entered for a person, meaning that reps from various business areas may be required.

16

Product Detailing – LSI

You can select certain products in your item master that should receive special attention for a specific time period.

Use the **Product Detailing Definition** info area to define products and various items that is the subject of your focus for the defined time period, see Adding Product **Detailing Definitions** on page 504. Reps can link these items to activity records using the quick add features and enter the customer responses, see **Discussing Products** on page 505 and **Quick Add** on page 164.

Adding Product Detailing Definitions

Product detailing definitions and items (focus products) are used for product detailing within the scope of an activity, see Call Documentation – LSI on page 432.

To add a product detailing definition:

- 1. Select **W** (Sales) > Product Detailing Definition.
- 2. Click on \oplus (New).

🗊 Produ	ict Detailing	g Definition Pharm	a Painless		
= 🖉 🗸	⊘ X Close	Tab			
	Name	Pharma Painless		Type PD prio	
	Business area	Rx		Specialty Pain Medicine	
	Starts on	01.01.2009		Ends on 31.12.2011	
Related Product		efinition Items ×			
					+ New -> Browse
ø	Line No.	Item No.	Item name	Indication group	Brand
	1	00003	PainlessCRM Capsules	Indication Group 1	Original drug - prescri
	2	1844	IND 10mg	Indication Group 1	Original drug - non-pr

- 3. Enter a name in the Name field.
- Select the type of focus product in the Type field. The items displayed in the quick add area can be filtered based on this type, see Discussing Products on page 505.
- Enter the time period that this product should be focused on in the Starts on and Ends on fields. Only those items are displayed in the Quick Add (Product Discussions) area where the current date is in the defined time period.

- 6. Enter the **Business area** and/or **Specialty**. The items that are displayed in the quick add area for product detailing are determined based on this data as follows:
 - Items where the business area entered in the product detailing definition matches the rep assigned to the activity are displayed.
 - Items where no specialty is entered are displayed.
 - Items where the specialty matches the specialty entered in the person record the activity was added for are displayed.

Note: Only one record may exist for the same combination of **Type**, **Business** area and **Specialty** for a certain time period.

7. Save.

To add product detailing definition items:

1. Switch to the desired product detailing definition, and click on ⊕ (New) on the **Product Discussion Definition Items** tab.

New: Produc	t Discussion	Definition Iter	n		
~ 0					
Line No.			Item No. 564	Q, X	
Item name	Flyer A				
Item type	Pills	+ ~ Inc	dication gro	+ ~	Brand Original drug - non-pre + 🗸
Product		+ ~			
Key message					
Competitor inf					

- 2. Select an item from the Item No. field. The Item name, Item type, Brand, Product and Indication group are entered automatically.
- 3. Click Save. The Item No. is assigned automatically.

Discussing Products

Products are discussed with customers with the scope of activities (e.g. visits). You can store the customer's response the various items.

You can enter information on products that have been discussed when documenting calls, see Call Documentation – LSI on page 432. You can use the quick add function to enter items.

To add a product detailing record to an activity:

- 1. Switch to the desired activity or add a new one, see Adding Activities on page 292.
- Select Quick Add (Product Discussions) from the context menu, see Quick Add on page 164.
- Select a filter to display the items defined for the selected type (PD prio or PD standard).

Select **All** to display all items in the currently valid product detailing definitions (of all types) where the business area is the same as your own and where the specialty matches that of the person the activity is linked to.

Adding Product Detailing Definitions

Product detailing definitions and items (focus products) are used for product detailing within the scope of an activity, >> Call Documentation – LSI on page 432.

To add a product detailing definition:

- 1. Select **Sales**) > Product Detailing Definition.
- 2. Click on \oplus (New).

Prod	uct Detailing	g Definition Pharm	a Painless		
= 🖉 🗸	🖉 🖉 🗙 Close	Tab			
	Name	Pharma Painless		Type PD prio	
	Business area	Rx		Specialty Pain Medicine	
	Starts on	01.01.2009		Ends on 31.12.2011	
Related	Data				
		efinition Items ×			
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		efinition Items ×	Item name	Indication group	
Product	t Discussion D		Item name PainlessCRM Capsules	Indication group Indication Group 1	+ New \-> Browse

- 3. Enter a name in the Name field.
- Select the type of focus product in the Type field. The items displayed in the quick add area can be filtered based on this type, >> Discussing Products on page 505.
- Enter the time period that this product should be focused on in the Starts on and Ends on fields. Only those items are displayed in the Quick Add (Product Discussions) area where the current date is in the defined time period.
- 6. Enter the **Business area** and/or **Specialty**. The items that are displayed in the quick add area for product detailings are determined based on this data as follows:
 - Items where the business area entered in the product detailing definition matches the rep assigned to the activity are displayed.
 - Items where no specialty is entered are displayed.
 - Items where the specialty matches the specialty entered in the person record the activity was added for are displayed.

Note: Only one record may exist for the same combination of **Type**, **Business area** and **Specialty** for a certain time period.

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1. Switch to the desired product detailing definition, and click on ⊕ (New) on the **Product Discussion Definition Items** tab.

10				
0				
Line No.		Item No. 564	Q, 🗙	
Item name	Flyer A			
Item type	Pills	+ v Indication gro	+ ~	Brand Original drug - non-pre +
Product		+ ~		
Key message				
Competitor inf				

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- 3. Save.

The Item No. is assigned automatically.

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Products are discussed with customers with the scope of activities (e.g. visits). You can store the customer's response the various items.

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- 1. Switch to the desired activity or add a new one, see Adding Activities on page 292.
- Select Quick Add (Product Discussions) from the context menu, see Quick Add on page 164.
- Select a filter to display the items defined for the selected type (PD prio or PD standard).

Select **All** to display all items in the currently valid product detailing definitions (of all types) where the business area is the same as your own and where the specialty matches that of the person the activity is linked to.

Click on **Overview** to display an overview of the entered items.

4. Enter the desired data.

- 5. Save.
- 6. A product detailing record and product detailing item record is added for each of the items you have entered.

Note: Open the activity from the account's tree view to view the data. Open a product detailing record on the **Product Detailing** tab to display the associated items.

17

Inventory Management

Learn about inventory management.

You can manage company-independent stocks for each item and lot inventory management consists of taking inventory and managing stock transactions, see Stock Inventory on page 507 and Stock Transactions on page 509.

When taking inventory, sales reps can count their current stocks and submit these figures for verification. Back office staff can apply any changes in stocks to the system once stocks have been approved.

Stock transactions allow sales reps to order items for their stocks, report items as lost or stolen, return goods to the warehouse or transfer stocks to other sales reps.

Stocks can be maintained per rep and item, see **Stock** on page 507. When a rep receives items from storage, their personal stock increases; when a rep distributes items, their personal stock is decreased.

Stock

The **Stock** info area provides you with an overview of your current stocks.

You **cannot** enter data manually. Aurea CRM automatically adds records that increase or decrease stocks per rep, stock, item and lot for all stock transaction item, order item, POS material item and sample records that affect stocks.

Stocks are always counted in units (Quantity Unit field).

Select **Select** (Sales) > Stock to display your stocks.

Stock Inventory

When taking inventory, sales reps can count their current stocks and submit these figures for verification.

Back office staff then verify the inventory. This allows stocks entered in the database to be compared to the stocks actually available to sales reps.

Counting has no effect on stocks, but stocks can be updated by back office staff by **applying differences** between the actual quantity and expected quantity to stocks.

When counting stocks, the sum total takes stock movements in various records (e.g. POS material items, order items, samples) into account. Quantities are always given in single units. Once the stocks have been counted by the system, the quantity needs to be compared to the actual stocks.

To perform the inventory:

- 1. Select **Sales**) > Stock Inventory.
- 2. Click on \oplus (New).

A new stock inventory record is added for you with the current date entered. The **Status** is set to "Open".

A stock inventory item record is added for each of your stock records where the **Quantity Unit** is greater than zero.

You can edit the stock inventory record and stock inventory items.

To add stock inventory items manually, open the stock inventory record and click on \oplus (**Quick Add**) in the **Stock Management Item** tab, see **Quick Add** on page 164. Select the desired item and enter the desired details.

You can filter stock inventory records in the stock inventory search:

- **Pending**: Records where a date is entered in the **Inventory declined on** field and/or the **Status** is "Open" or "Canceled".
- Submitted: Records where the Status is "to be verfied".
- Completed: Records where the Status is "Completed" or Transferred".

Submitting, Approving and Finalizing the Stock Inventory

Learn to manage stock inventory.

Submitting Stock Inventories

Once you have performed the inventory in the CRM system and have entered the actual quantity of stocks, click on **(Submit)** to submit the data for approval.

The **Status** is set to "To be verified". The current date is automatically entered in the **Counting completed on** field. You can no longer edit the record.

Your superior is informed on their start page that they need to approve your stock inventory.

If you superior rejects your stock inventory, you are informed on your start page. You can edit the stock inventory items, add new ones and resubmit the stock inventory.

If your stock inventory is approved, you can no longer edit the record.

Approving Stock Inventories

Stock inventories that needs to be approved by you (as sales manager) are displayed on your start page.

Double-click on a record to open it. You can edit existing stock inventory items (**Quantity counted** and **Difference Reason**) and add new items.

Click on (Approve) or (Reject) to approve or reject a stock inventory record. The Status is set to either "Transferred" or "Canceled". You can no longer edit records that have been approved. The responsible back office rep is informed that the stock inventory data needs to be booked into the system.

If you reject the stock inventory, the submitter is informed on their start page. You can no longer edit the record.

Completing the Stock Inventory

Stock inventories that you need to book (e.g. in your back office role) are displayed on your start page (back office start page).

Edit the records if necessary and then click on **(Complete**)to apply any difference between the actual and expected stocks to the system.

The **Status** is set to "Closed". Any differences between the actual quantity of stocks and the expected quantity are applied to the system to update current stocks. The records can no longer be edited.

The **Booked** field in the stock inventory record is enabled.

Stock Transactions

Stock transactions allow sales reps to order items for their stocks, report items as lost or stolen, return goods to the warehouse or transfer stocks to other sales reps.

Depending on the type of transaction (order, loss, theft, return, transfer), the transaction may require approval, either by back office staff or a superior.

The following stock transactions are available:

- Order items, see Stock Orders on page 511.
- Report losses of thefts, see Reporting Losses and Thefts on page 512.
- Return items, see Returns on page 513.
- Transfer items to another sales rep, see Transfers on page 514.

Note: Your administrator can determine that your superior is responsible for approving transactions instead of back office staff.

Adding Stock Transactions

Learn to add Stock Transactions.

To add a stock transaction:

1. Select **Sales**) > Stock Transaction to open the search.

saction	Userstat		Stock			ransaction date		~		
10	+ Add more	¥	With me			Res	et Start Sea	rch		
¢ 1 - 10	0 of 10+ > 30	-		-		ew Loss notification		_		
	Transaction 2130000845	Transaction 10.10.2013	User Adam Aussendien-		Transfer to R	Transaction type	Open	Reason	Number of i	
≡ ×	2130000838	09.10.2013	Adam Aussendien		August Account		to be verified			
	2130000758	10.09.2013	Adam Aussendien	Berta Basis		Order	Transfered			
	2130000749	03.09.2013	Adam Aussendien	Berta Basis		Order	Transfered			
	2130000750	03.09.2013	Adam Aussendien	Berta Basis		Order	to be verified			
	2130000739	02.09.2013	Adam Aussendien	Berta Basis		Order	Delivered			
	2130000662	29.08.2013	Adam Aussendien	Berta Basis		Loss notification	to be verified			
	2130000658	29.08.2013	Adam Aussendien	Berta Basis		Order	Completed			
	2130000660	29.08.2013	Adam Aussendien	Berta Basis		Order	Completed			
	2130000667	29.08.2013	Adam Aussendien	Berta Basis		Reshipment	to be verified			
ated D	Data							-	K ≮ 1 - 10 of 10+	•
tock Tr	ansaction Items ×	1						4	Browse 📓 Quick	Ad
	Stock Man I	tem No.	Ite	m name					ity Lot No.	

You display stock transactions that are in progress or have been completed, or display all transactions using *O* (**No Filter**).

Note: Sales reps can only view their own stock transactions while back office staff can view all transactions.

2. Select an option, e.g. \oplus (New Order) to add a new order.

The quick add area for stock transaction items is opened, see Quick Add on page 164.

Note: Only those items are displayed in the quick add area where the **Stock Control** field is enabled in the item master record.

- 3. Enter the details of the items.
- 4. Click on l'm done.

A stock transaction record is added including the corresponding stock transaction item records. The **Transaction status** is set to "Open". The **Transaction type** is set to the appropriate value (e.g. "Order").

Double-click on the stock transaction record to open the quick add area.

Select **Open** from the stock transaction record's context menu to open the record in tab view.

 Click on ✓ (Submit) to submit the stock transaction record to you superior or back office staff for approval.

The Transaction status is set to "to be verified".

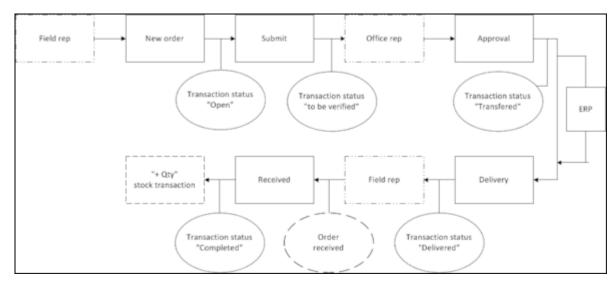
Note: Some buttons (e.g. || (**Approve**) and \checkmark (**Submit**)) are only displayed once you have selected a record in the search. If you want to transfer items in your stocks to a colleague (\oplus (**New Transfer**), you first need to select the recipient. The quick add area for stock transaction items is then opened.

The following topics described the further steps required for stock transaction (e.g. orders, losses etc.).

Stock Orders

Learn to manage stock orders.

The diagram below illustrates how goods are ordered by sales reps. The order is received approved by back office staff and the items are transferred to the sale rep:



1. Sales Rep

The sales rep places an order, see Adding Stock Transactions on page 510.

The sales rep can no longer edit the record.

2. Office Staff

The stock transactions requiring verification are displayed on the office worker's start page.

Select **Open** from the context menu to open the stock transaction. Double-click on a record to open the stock transaction search.

The stock transaction and stock transaction items can be edited.

The office worker can select the following options:

• (Approve): The Transaction status is set to "Transferred".

The transaction is transferred to the ERP system. If the ERP confirms the transaction, the item can be handed over to the sales rep. If the full quantity of the order cannot be delivered, the office worker can edit the stock transaction items.

Once the office worker clicks on $\frac{1}{2}$ (**Delivered**), the **Transaction status** is set to "Delivered" and the sales rep is informed of this on the start page.

• X (Reject): The Transaction status is set to "Cancelled". Rejected stock transactions are displayed on the submitter's start page. The stock transactions can be edited and resubmitted.

3. Sales Rep

Stock transactions that have been received or rejected (or canceled) are displayed on the submitter's start page under **Stock Management**.

Select **Open** from the context menu to open the stock transaction. Double-click on a record to open the stock transaction search.

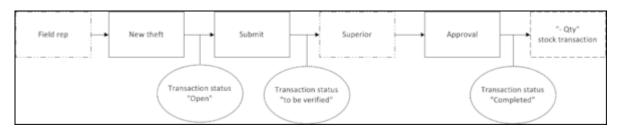
Click on ²⁺ (**Received**) to confirm that the ordered items have been received. The **Transaction status** is set to "Closed" and the stock transaction items now **affect stocks**. The rep's stocks are updated to include a transaction using the quantity factor "+Qty".

Reporting Losses and Thefts

Learn to report losses and theft.

Reporting losses and thefts require the same steps.

The diagram below illustrates reporting a loss. A sales rep reports the loss, which then needs to be approved by the rep's superior:



1. Sales Rep

The sales rep reports the loss or theft of items, see **Stock Transactions** on page 509. The sales rep's superior is notified on their start page.

2. Superior

The stock transactions requiring verification are displayed on the superior's start page.

Select **Open** from the context menu to open the stock transaction. Double-click on a record to open the stock transaction search.

The following options are available:

• I (Approve): The Transaction status is set to "Closed".

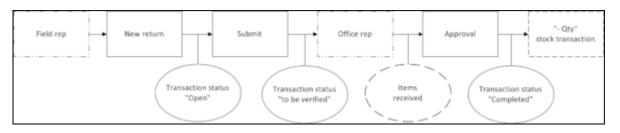
The stock transaction items now **affect stocks**. The rep's stocks are updated to include a transaction using the quantity factor "-Qty".

• X (Reject): The Transaction status is set to "Canceled". Rejected stock transactions are displayed on the submitter's start page. The stock transactions can be edited and resubmitted.

Returns

Learn about returning orders.

The diagram below illustrates how goods are returned by sales reps. The goods are received by back office staff and the return is confirmed:



1. Sales Rep

The sales rep returns the item, see Adding Stock Transactions on page 510. The back office employee is notified on their start page.

2. Office Staff

The stock transactions requiring verification are displayed on the office worker's start page.

Select **Open** from the context menu to open the stock transaction. Double-click on a record to open the stock transaction search.

The office worker can select the following options:

• **(Approve**): Once the return has been received, select this option to approve the stock transaction. The **Transaction status** is set to "Closed".

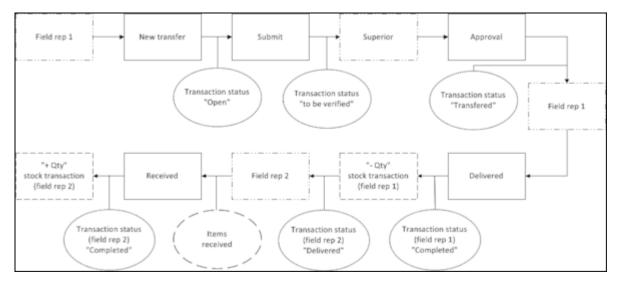
The stock transaction items now **affect stocks**. The rep's stocks are updated to include a transaction using the quantity factor "-Qty".

• X (Reject): The Transaction status is set to "Canceled". Rejected stock transactions are displayed on the submitter's start page. The stock transactions can be edited and resubmitted.

Transfers

You can transfer items between stocks.

The diagram below illustrates transferring items between stocks. A sales rep wants to transfer an item from his stock to that of a colleague. The sales rep's superior needs to approve the transfer:



1. Sales Rep 1

Sales rep 1 applies to transfer the item, see Adding Stock Transactions on page 510. The sales rep's superior is notified on their start page.

2. Superior

The stock transactions requiring verification are displayed on the superior's start page.

Select **Open** from the context menu to open the stock transaction. Double-click on a record to open the stock transaction search.

The following options are available:

- **(Approve)**: The **Transaction status** is set to "Transferred". Sale rep 1 is informed thereof on their start page.
- X (Reject): The Transaction status is set to "Canceled". Rejected stock transactions are displayed on rep 1's start page. The stock transactions can be edited and resubmitted.

3. Sales Rep 1

The stock transfers that have been approved are displayed on sales rep 1's start page.

Select **Open** from the context menu to open the stock transaction. Double-click on a record to open the stock transaction search.

Sales rep 1 then hands over or ships the items. Click on ***** (**Delivered**) to set the **Transaction status** to "Closed" for sales rep 1. Rep 1's stocks are updated to include a transaction using the quantity factor "-Qty".

Sale rep 2 is informed thereof on their start page. The **Transaction status** for sales rep 2 is "Delivered".

4. Sales Rep 2

The stock transfers that have been delivered are displayed on sales rep 2's start page.

Select **Open** from the context menu to open the stock transaction. Double-click on a record to open the stock transaction search.

Click on # (**Received**) to confirm that the items have been received. The **Transaction status** is set to "Closed" and the stock transaction items now **affect stocks**. Rep 2's stocks are updated to include a transaction using the quantity factor "+Qty".

18

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, marketing objectives or mailings
- · Generate mass mailings and faxes
- Send SMS and e-mails
- Trigger follow-up marketing activities automatically based on responses
- Monitor the results

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.

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 accounts, persons and in queries.

- Ensure that persons/accounts are only present once in the query results.
- If both an account and a person from that account are present, the person is used for the quick campaign.
- 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 results list, see Selecting Multiple Records.
- 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.

Marketing Calendar

The marketing calendar is an important tool for managing campaigns.

The marketing calendar displays a graphical overview of activities and campaigns including an indicator that represents a campaign or marketing activity's progress or success.

To display campaigns and marketing activities in the marketing calendar:

 Select (Marketing) > Marketing Calendar. The marketing calendar is displayed.

5.1	1.20)14	- 23	3.07	.20	15				9	5 4	9	0 0				
¢			Nov	2014			>	^	Campaigns	2014				2015			
W	Mon	Tue	Wed	Thu	Fri	Sat	Sun			November December	January	February	March	April	May	June	July
44						1	2	^	Quick Campaign 'Lette	0							
45	3	4	5	6	7	8	9										
46	10	11	12	13	14	15	16	^	Upgrade offer - 25% off		Θ Upgrad	le offer - 259	6 off				
47	17	18	19	20	21	22	23					-					
48	24	25	26	27	28	29	30										
49				-4		6											
	Tod	day:	Mon	23 1	lar, 3	2015											
							~ ¥										

Individual elements (campaigns, sales cycles, marketing activities) are displayed as colored blocks.

Note: If no end date is entered in a marketing activity, it is displayed as lasting for a single day.

The current date is indicated by a vertical line.

You can edit and display campaigns and activities in a number of ways:

- Use the icons in the header to choose what to display:
 - Campaigns and marketing activities
 - Sales cycles and marketing activities
 - Conly marketing activities
- To display or hide the marketing activities that make are part of a campaign, click on ^ or ~ in the left-most column. Click on ^ or ~ in the column header to hide/show all marketing activities for all campaigns.



- Edit Settings): Choose whether to color-code elements by type (info area) or status.
- 😰 (Legend): Displays information on the colors in the calendar
- To configure the time period that is displayed:
 - Click on the desired day or start of the time period in the small calendar in the sidebar.
 - Select the time period that is displayed using the slider in the header: drag the slider to the left or right or click on the plus and minus signs on either side to zoom in or out.

Θ

- Drag the timeline at the top of the calendar to the left of right to scroll the time period.
- Select a filter from the drop-down list in the sidebar to determine which elements should be displayed. You can also define you own filter, see Defining General Filters on page 283.
- If the full duration of an element in the calendar is not visible, an arrow is displayed indicating that the element's duration exceeds the display area:



• To change an entry's start or end, click on the left or right border and drag it to the desired position:



• To reschedule an element, click on it and drag it to the desired time.

Click on (Move linked items) to determine whether activity execution records and agenda items should also be rescheduled accordingly. For more information on the affected fields in the activity execution and agenda item records, refer to the online field help.

- Click on a campaign or marketing activity to display a summary of the record.
- Double-click on a campaign or marketing activity in the marketing calendar to edit it.

Campaigns

A campaign consists of one or more marketing activities that take place sequentially.

You can also add marketing activities that are not part of a campaign, see **Defining** Marketing Activities on page 523.

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 550. 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.

Text Approval & Verification Target Group Size & Costs Success (Overview) Success (Details)								
Ends on 25.12.2013 V Responsible Event location Q Text Approval & Verification Target Group Size & Costs Success (Overview) Success (Details)	Name	Christmas Campa	ign	Туре	~			
Text Approval & Verification Target Group Size & Costs Success (Overview) Success (Details)	Starts on	17.10.2013	~	Language	~	Status	Scheduled	~
Approval & Verification Target Group Size & Costs Success (Overview) Success (Details)	Ends on	25.12.2013	~	Responsible	2	Event location		Q, 🗙
	Text							
	Approval 8	Varification	Target Gree	in Cize & Coste	Surges (Quantiaw)	Gurraee	(Dataile)	
Verification r				up Size & Costs Budget appr				,

- 2. Click Save.
- Add the marketing activities that make up the campaign, see Defining Marketing Activities on page 523.

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, >> Campaign and Marketing Activity Templates on page 550. 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.

 								
Name	Christmas Car	npaign	Туре	~				7
Starts on	17.10.2013	~	Language	~	Status	Scheduled	~	
Ends on	25.12.2013	~	Responsible	2	Event location		Q, 🗙	
Text								
Approval &	Verification	Target Gro	up Size & Costs	Success (Overview)	Success	(Details)		
Budget appr		E	Budget appr	2	Budget appr		~	
Verification r			Verification by		Verified on		~	

- 2. Save.
- 3. Add the marketing activities that make up the campaign, >> Defining Marketing Activities on page 523.

Marketing Activities

Learn about the marketing activities.

Marketing activities are executed in the following steps:

- 1. Preparation, see Planning and Preparing Marketing Activities on page 522.
- 2. Define the marketing activity and any additional information, see Defining Marketing Activities on page 523.
- 3. Create the target group, see Creating Target Groups on page 542.
- 4. Edit the target group, see Editing Target Groups on page 542.
- 5. Generate and edit the data, see Executing Marketing Activities on page 543.
- 6. Monitor the results, see Monitoring Results on page 545.

Related marketing activities can be grouped together to form campaigns, see Campaigns on page 519.

Note: You can also generate marketing activities and marketing objectives using the key account management functions, see Key Account Management on page 478.

Planning and Preparing Marketing Activities

This topic explains Planning and Preparing Marketing Activities

Before executing a marketing activity, you need to enter its details and create any necessary documents and records:

- 1. Determine how you wish to contact your customers or prospects:
 - Mailings: Letters, e-mails, faxes or SMS can be created automatically within the scope of the marketing activity.
 - Telephone: Activity records are automatically generated and can be edited by telemarketing staff.
 - Combined channels: The customer/prospect is contacted using their preferred channel.
 - 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 101.

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 on page 550. If you require additional fields, contact your administrator. Your administrator can define transfer fields that you can select for marketing activities.

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 326.

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

Learn 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 >> Adding and Editing Templates on page 550. 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.

📢 New: Mar	keting Activity
~	
Marketing Acti	<u>+</u>
Starts on	
Ends on	Christmas Card
	Confirmation
Text	Consultation
	Event
	Follow-up
	Invitation
	Newsletter
	Offer
	Product Information
	Quick Campaign
	Survey

- 4. Enter the start and ed date in the Start on and Ends on fields.
- 5. Save.
- 6. Enter the following data:
 - Responses, see Responses on page 533.
 - Reps, see Reps on page 533.
 - Details on how the activity is executed, see Defining How the Activity is Executed on page 534.

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 \oplus (**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 followup marketing activity's target group.

₽ New: Resp	onse (Market	ing Activity)		
Marketing Acti	Survey		Response	I'm interested	+ ~
Follow-up Mar	Invitation	<u>R×</u>			
Number (Plan)	150	Select	Individual poi	10	Max. number 200
Number (Act.)			Points (Act.)		
Registration		~			
Participation s		*			
Result		~			

- Enter the number of points assigned to this response in the Individual points field and enter the expected number of responses in the Number (Plan) field. The target and actual points can then be compared in the statistics, see Monitoring Results on page 545.
- 6. Click Save.

Reps

Add the reps who are responsible for handling the campaign in addition to the rep responsible for the campaign itself:

- 1. Click on \oplus (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 on page 542.

Note: The **Telephone** and **E-mail** fields have no function in the default configuration.

4. Click Save.

Defining How the 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 marketing objectives
- 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 101.
- 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 / Edit 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 **Repeated: Frequency** and **Repeated: Frequency (Unit)** fields on the **Repeated** tab):

• **Repeated: Create target group based on selection / query 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 responses:**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 selection / 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 selection/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 accounts 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
- 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
 - Marketing Objectives: Details on the generated marketing objectives

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 345.

- **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 marketing objectives should be generated within the scope of the marketing activity, enable the corresponding options under Generate (work order = marketing objective). Activities are added as appointments for the telemarketing reps or account managers. Marketing objectives 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.
 - I 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 522. 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. Business E-Mail

2. Private E-mail

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 accounts:

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**

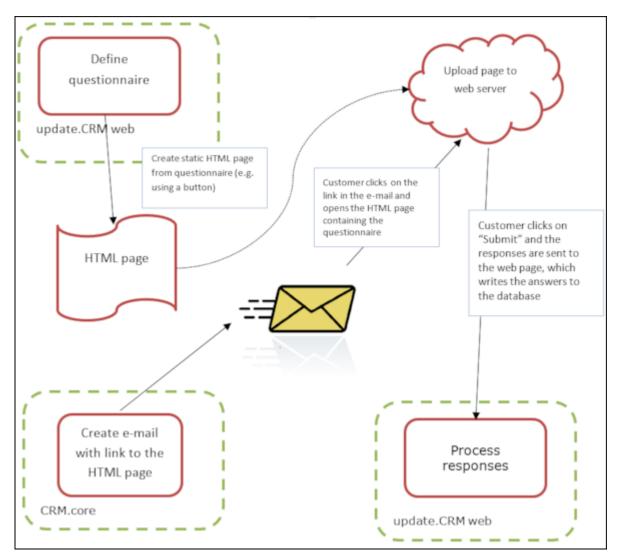
3. E-mail 2

If none of the fields contains an e-mail address, no e-mail is sent to this account or person.

- **Ignore assigned labels:** Replaces the label formats defined for accounts 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).
- Save the record and click on (Back). The marketing activity format is transferred to the Marketing Activity Format field in the execution record.

Surveys in Mass E-mails

Surveys can be integrated in e-mails. Recipients receive an e-mail containing a link to an HTML page where they can answer the questions. The answers are stored in Aurea CRM's database for the corresponding person.



To generate e-mails with an integrated questionnaire:

1. Define a questionnaire, see Defining Questionnaires on page 326.

The questionnaire can include questions with multiple and text-based answers. The following is not supported:

- Skipping questions that depend on the answer to a previous question
- Default answers using data in the database
- Mandatory questions
- · Automatically adding records based on answers
- Executing triggers
- 2. Generate an HTML page based on the questionnaire:
 - a. Select (Administration) > SDK (this requires administrator privileges).
 - b. Select Surveys > External Survey.
 - c. Enter the first letter of the name of the questionnaire under step 1 (Select a Survey) and select the desired questionnaire from the list.

d. Click on the download link in step 2 (Options).

Surveys	External Survey
Conduct Survey External Survey Sdk Index Reload	 External survey This sample creates external surveys. External surveys are HTML pages. Links to this HTML page are sent to customers via e-mail (e.g. using a campaign). The HTML page has to be hosted on the companies web server. The response is posted to HTTP channel "api/externalSurveys/Respond". Follow these steps to simulate the workflow of creating, sending and conducting external workflows: Select a Survey Enter a survey name Customer Satisfaction
	Options Review the options for creating the external survey. Options passed to channel method "SurveyChannel.CreateExternalSurveyHtml": 1 { 2 // override the default name of the razor template 3 view: "crm/survey.cshtml" 4 } 5 You can now download the external survey as a HTML page, or continue the simulation with point 3.

- e. You can change the content by either editing the HTML file or by editing the Razor template (web\data\surveys\crm\survey.cshtml) used to generate the HTML file. For more information, see the article External Survey's Architecture at https://support.aurea.com.
- f. Upload the HTML page to the web server so that it is accessible from the link in the e-mail sent to recipients.
- 3. Define a transfer fields format containing the fields in the **Person** and **Person in Company** info areas you want to use in the e-mail.
- 4. Create the e-mail using person data as in the example below:

The placeholders beginning with "KP" reference the transfer fields in the **Person in Company** (KP) info area.

The <%LinkQuestionnaire%> placeholder generates a link to the questionnaire.

- 5. Add a marketing activity.
- 6. Add an execution record for the marketing activity and enter data in the following fields:
 - Marketing Activity Format, Execution Type, Base, Target group definition, see Defining How the Activity is Executed on page 534.
 - Subject: The e-mail's subject
 - E-mail: Template Document: E-mail template for unpersonalized e-mails
 - Template Document (TXT): E-mail template for personalized e-mails
 - E-mail: Send as: Select "HTML" to ensure that the link to the questionnaire is displayed correctly.
 - E-mail from: The e-mail address used as the sender of the e-mail
 - E-mail: not personalized: Enable this option to determine that no personal information should be included in the e-mail.
 - Send questionnaire: Enable this option.
 - Questionnaire (e-mail): Choose the questionnaire you prepared earlier.
 - Web server address: Enter the full URL of the HTML file, e.g. http://my.company.com/Questionnaire/CustomerSatisfaction.html.

Menu 🖋 Edit 🧹 Save 🥝	Cancel 🕴 🖣 Create target group 🕻 Start Marke	ting Activity	2 ×		
Marketing Activity Format	E-mail questionnaire				Q, X
Execution Type	One-off, execute selection/query				v
Base	Private query	~	Target group definition	Simons	Q, 🗙
Start on	22.08.2014	~	Start at	12:44	
Executing Rep ID	mmserver1	2	Start automatically	×	
Target Group Generate	Activities Mailings Work Orders Sen	d Repeat	Automat. Log		
SMS: Text File (TXT)		Q,	SMS: not personalized		
Letter: Template Document		Q,	Save letters	0	
E-mail: Template Document	A1-183	Q, 🗙	E-mail: Send as	HTML	
E-mail from	simon.eder@update.com		E-mail: not personalized		
E-mail Priority	High	~			
Subject					
Attach.1		Q,	Attach.2		0
Send questionnaire	2				
Questionnaire (e-mail)	QuestionnaireForCatalogCustomers	Q, 🗙	Web server address	http://updocu02/survey/Questionnaire.html	

- 7. Switch to the marketing activity format (see Defining the Marketing Activity Format on page 536).
 - Select E-mail and Activity in the Preferred Channel section.
 - Enter the transfer field's format on the E-mail tab.
- 8. Execute the activity, see Executing Marketing Activities on page 543.

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 \oplus (**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 followup marketing activity's target group.

🌳 New: Resp	onse (Marke	ting Activity)			
~						
Marketing Acti	Survey		Response	I'm interested	+ ~	
Follow-up Mar	Invitation	<u>e ×</u>				
		Select				
Number (Plan)	150		Individual poi	10		Max. number 200
Number (Act.)			Points (Act.)			
Registration		~				
Participation s		~				
Result		~				

- 5. Enter the number of points assigned to this response in the Individual points field and enter the expected number of responses in the Number (Plan) field. The target and actual points can then be compared in the statistics, >> Monitoring Results on page 545.
- 6. Save.

Reps

Add the reps who are responsible for handling the campaign in addition to the rep responsible for the campaign itself:

- 1. Click on \oplus (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 on page 542.

Note: The **Telephone** and **E-mail** fields have no function in the default configuration.

4. Save.

Defining How the 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 marketing objectives
- File formats and other information on mailings, e-mails, SMS and faxes.

To enter the details of how a marketing activity is executed:

- 1. Select Create / Edit Execution from the marketing activity's context menu.
- 2. Use the **Base** field to determine the basis for the target group. The target group can be determined using a global query or private query, >> Queries on page 101.
- 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.

- Select a Marketing Activity Format or select Create / Edit 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 **Repeated: Frequency** and **Repeated: Frequency (Unit)** fields on the **Repeated** tab):

• **Repeated: Create target group based on selection / query 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 responses:**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 selection / 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 selection/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 accounts 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
- 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
 - Marketing Objectives: Details on the generated marketing objectives

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, >> Mail Merges on page 345.

- **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 marketing objectives should be generated within the scope of the marketing activity, enable the corresponding options under Generate (work order = marketing objective). Activities are added as appointments for the telemarketing reps or account managers. Marketing objectives 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.
 - I you have selected a fixed channel or not specified a channel, select the appropriate type (e.g. **Activity** for the phone channel).
 - If you have chosen variable channels, select all the applicable options. The first option that is selected in the order mailing, activity, work order is taken into account (when using the phone channel, only activity or work order).
- 4. Use the tabs in the lower portion of the screen to determine further settings for all channels apart from "Phone":
 - **Transfer Fields:** Select the predefined transfer fields, >> Planning and Preparing Marketing Activities on page 522. 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. Business E-Mail

2. Private E-mail

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 accounts:

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.

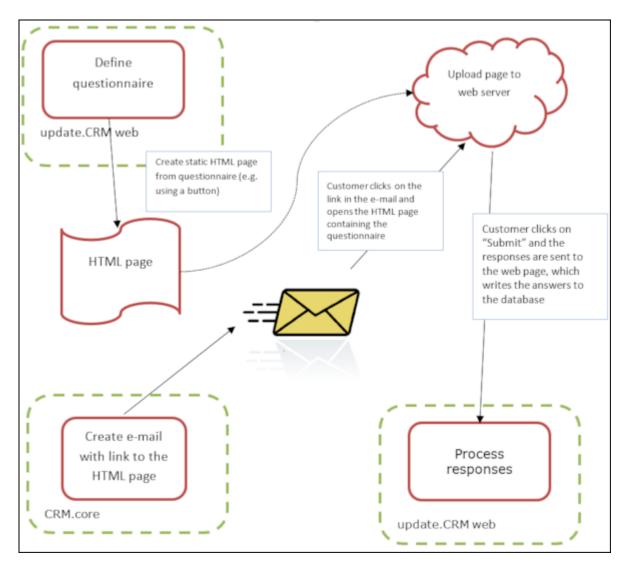
- 2. E-mail
- 3. E-mail 2

If none of the fields contains an e-mail address, no e-mail is sent to this account or person.

- **Ignore assigned labels:** Replaces the label formats defined for accounts 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).
- Save the record and click on (Back). The marketing activity format is transferred to the Marketing Activity Format field in the execution record.

Surveys in Mass E-mails

Surveys can be integrated in e-mails. Recipients receive an e-mail containing a link to an HTML page where they can answer the questions. The answers are stored in Aurea CRM's database for the corresponding person.



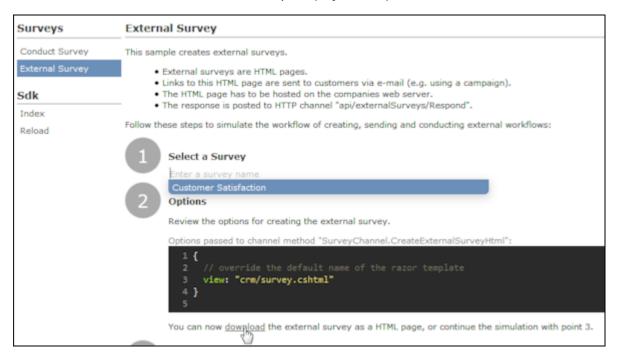
To generate e-mails with an integrated questionnaire:

1. Define a questionnaire, >> Defining Questionnaires on page 326.

The questionnaire can include questions with multiple and text-based answers. The following is not supported:

- Skipping questions that depend on the answer to a previous question
- Default answers using data in the database
- Mandatory questions
- · Automatically adding records based on answers
- Executing triggers
- 2. Generate an HTML page based on the questionnaire:
 - a. Select (Administration) > SDK (this requires administrator privileges).
 - b. Select Surveys > External Survey.

- c. Enter the first letter of the name of the questionnaire under step 1 (Select a Survey) and select the desired questionnaire from the list.
- d. Click on the download link in step 2 (Options).



- e. You can change the content by either editing the HTML file or by editing the Razor template (web\data\surveys\crm\survey.cshtml) used to generate the HTML file. For more information, see the article External Survey's Architecture at https://support.aurea.com.
- f. Upload the HTML page to the web server so that it is accessible from the link in the e-mail sent to recipients.
- 3. Define a transfer fields format containing the fields in the **Person** and **Person in Company** info areas you want to use in the e-mail.
- 4. Create the e-mail using person data as in the example below:

```
<body>
Dear <%KPFirstName%> <%KPLastName%>,<br /><br /><br /><br /><br /><pr //<pr //></pr //</pr //</p>
```

The placeholders beginning with "KP" reference the transfer fields in the **Person in Company** (KP) info area.

The <%LinkQuestionnaire%> placeholder generates a link to the questionnaire.

- 5. Add a marketing activity.
- 6. Add an execution record for the marketing activity and enter data in the following fields:
 - Marketing Activity Format, Execution Type, Base, Target group definition, >> Defining How the Activity is Executed on page 534.
 - Subject: The e-mail's subject
 - E-mail: Template Document: E-mail template for unpersonalized e-mails
 - Template Document (TXT): E-mail template for personalized e-mails
 - E-mail: Send as: Select "HTML" to ensure that the link to the questionnaire is displayed correctly.
 - E-mail from: The e-mail address used as the sender of the e-mail
 - E-mail: not personalized: Enable this option to determine that no personal information should be included in the e-mail.
 - Send questionnaire: Enable this option.
 - Questionnaire (e-mail): Choose the questionnaire you prepared earlier.
 - Web server address: Enter the full URL of the HTML file, e.g. http://my.company.com/Questionnaire/CustomerSatisfaction.html.

🗮 Menu 🖉 Edit 🗸 Save 🥝	Cancel 🖣 Create target group 🔉 Start M	farketing Activity	2 *		
Marketing Activity Format	E-mail questionnaire				Q, 🗙
Execution Type	One-off, execute selection/query				~
Base	Private query	~	Target group definition	Simons	Q, 🗙
Start on	22.08.2014	~	Start at	12:44	
Executing Rep ID	mmserver1	2	Start automatically	×	
Target Group Generate	Activities Mailings Work Orders	Send Repeat	Automat. Log		
		Q,	SMS: not personalized		
Letter: Template Document		Q,	Save letters		
E-mail: Template Document	A1-183	Q, 🗙	E-mail: Send as	HTML	~
E-mail from	simon.eder@update.com		E-mail: not personalized		
E-mail Priority	High	~			
Subject		0			0
Attach.1		Q,	Attach.2		ų
Send questionnaire					
Questionnaire (e-mail)	QuestionnaireForCatalogCustomers	Q, X	Web server address	http://updocu02/survey/Questionnaire.html	

- Switch to the marketing activity format (>> Defining the Marketing Activity Format on page 536).
 - Select E-mail and Activity in the Preferred Channel section.
 - Enter the transfer field's format on the E-mail tab.
- 8. Execute the activity, >> Executing Marketing Activities on page 543.

Creating Target Groups

Learn to create target groups.

To create a target group:

1. Click on **Create Target Group** in the execution record's header.

If you do not create the target group yourself, it is automatically generated at the point in time specified in the execution record (**Start on/at** fields).

The reps that have been assigned to editing the target group receive a To-Do once the target group has been generated.

Editing Target Groups

Learn to edit 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. Click on the **Target Group** node of the marketing activity's tree view. The target group generated automatically is displayed.
- 2. Edit the target group:
 - Click on # (Add Company), A (Add Person) or * (Add Company Favorites or Add Person Favorites) to add further companies or persons 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 an 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 marketing objectives 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:

Editing Generated Records

To edit the records generated for a marketing activity:

- Contact the recipients and store their response(s) in the **Response (Marketing Act.) 1 - Response (Marketing Act.) 5** 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 332.
- 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").

Editing Generated Records

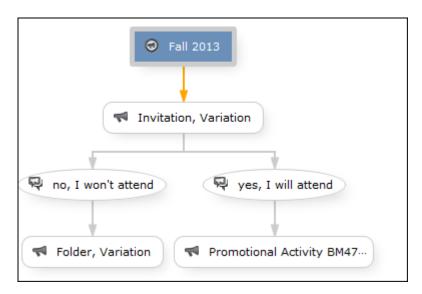
To edit the records generated for a marketing activity:

- Contact the recipients and store their response(s) in the **Response (Marketing Act.) 1 - Response (Marketing Act.) 5** 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 332.
- 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 Graph

The **Graph** tab in a campaign or marketing activity record displays the structure of the campaign graphically.

The campaign is displayed at the top. Marketing activities in the campaign are displayed with rounded corners, responses are displayed in ovals.



The following options are available:

- Drag the graph to move it.
- Use your mouse wheel to zoom.
- Double-click on an empty area in 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 to monitor results.

You can monitor the success and status of campaigns and marketing activities by performing calculations.

1. Click on **(Calculate**) in the campaign or marketing activity record.

Based on the responses received, the success of a marketing activity is determined by comparing the actual results with the target results. The success of a campaign is calculated based on the success of the individual marketing activities that make up the campaign.

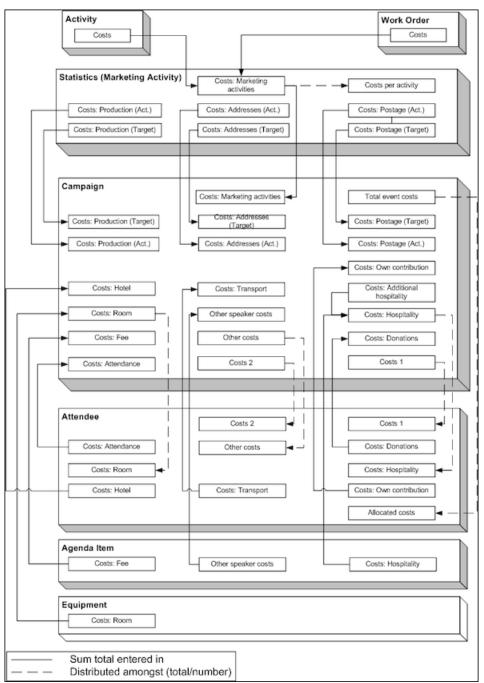
The statistics for a marketing activity are available from the **Statistics** tab and contain information on the number of responses, the points scored and statistics concerning the records generated within the scope of the marketing activity. You can edit the **Weighting** field in the statistics to determine the weighting of the marketing activity within the campaign's statistics.

The statistics for a campaign are stored on the **Success (Overview)** and **Success (Details)** tabs in the campaign record and include details on the target number of records and the total points scored by the responses. Furthermore, an overview of the associated costs in the default currency is available on the **Target Group Size & Costs** tab.

The charts on the following pages illustrate how costs and points are calculated for individual fields.

Further data is available in the campaign analysis. To carry out the campaign analysis, 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.

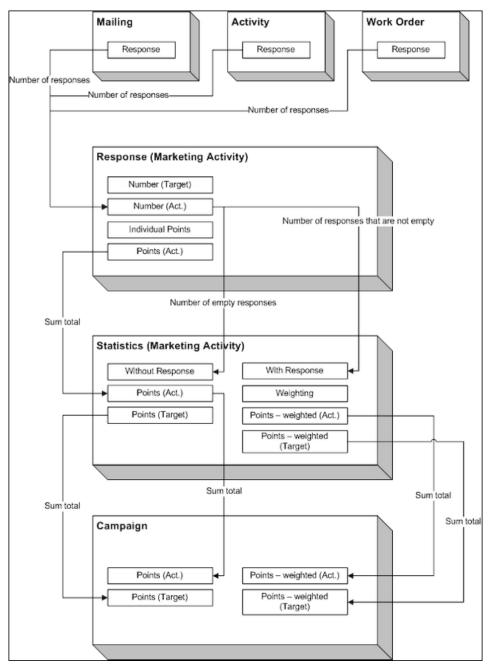


Costs

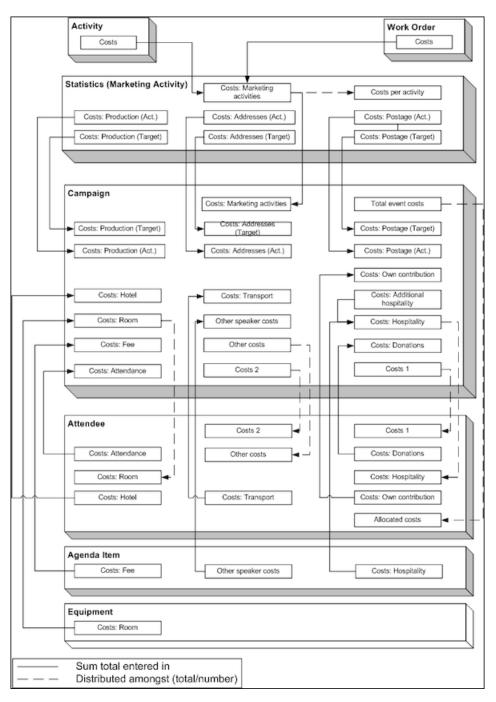
Campaign costs calculated based on data entered in the **Attendee**, **Agenda Item** and **Equipment** info areas are updated whenever you add a new record or edit an existing one. You can also click on **Calculate** in the **Campaign** info area to calculate the costs.

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



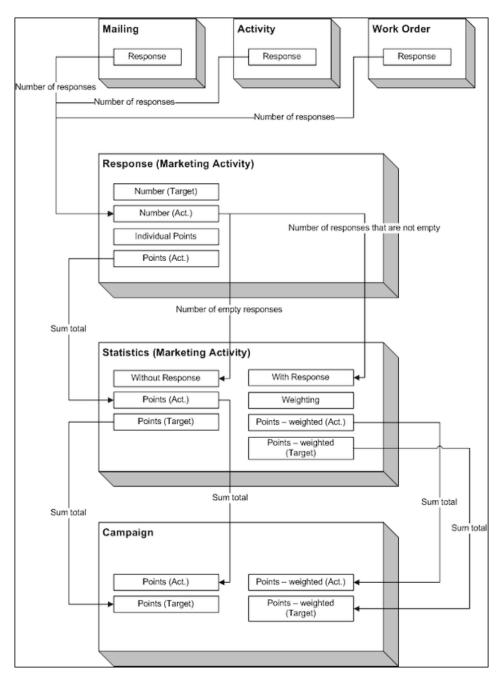
Costs



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 manually update the 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 customize existing documents, see Adding and Editing Templates on page 550.

Adding and Editing Templates

Learn to add and edit templates.

To display templates:

- Select (Marketing) > Campaign Templates.
- Select (Marketing) > Marketing Activity Templates.

Click \oplus (New) to add a new template. Enter "Template" in the Status field.

- Select (Master data) > 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
- 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 336.

Predefined Campaign Templates

This topic explains the 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 followup 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.

Marketing Objectives

Marketing objectives can be generated within the scope of marketing activities and linked to an account in the target group.

They contain information on questions that should be asked or invitations to events for the customer.

To display all marketing objectives:

1. Select (Marketing) > Marketing Objectives.

To display the current marketing objectives for an account:

1. Switch to the tree Marketing & Follow-up Objectives node in the tree view of an account.

Click on ((Yes) or ((No)) to set a marketing objective as having been completed or not having been completed respectively, representing positive or negative feedback. You can add follow-up objectives for marketing objectives.

Select **Start Survey** from the context menu to carry out a survey if a questionnaire is entered in the marketing objective.

Note: You can also generate marketing objectives (including questionnaires) using the key account management functions, see Key Account Management on page 478.

Campaigns for Sunshine Act Reports

Add a campaign and marketing activity to document transfers of value to accounts and persons that are relevant to Sunshine Act reports.

For information on campaigns and marketing activities, see Marketing Activities on page 521. The accounts/persons need to be added to the marketing activity as participants, see Adding Participants on page 788.

This following are used specifically for Sunshine Act reports:

- Select the appropriate **Type** and **Sub-type** in the campaign, e.g. "Research & Development" for clinical trials or "Donations & Grants".
- You can enter details on the costs for participating in a clinical trial, accommodation, meals etc. on the **Costs** tab of a participant.

Note: The **Costs: Donations** field is only displayed for participants that are accounts. Donations cannot be entered for persons.

- You can enter details on the expected costs for the entire campaign on the **Target Group Size & Costs** tab.
- Click on **Calculate** to calculate the sum total of all costs entered in all participant records and write these values to the costs fields in the campaign record, so that you can compare the actual costs to the target costs, see **Costs** on page 548.
- You can enter information on any contracts concluded with participants for each participant. You can enter details on the fee and when it was paid.

For more details on the cost fields in the Sunshine Act report, see Sunshine Act – LSI on page 802 and the online field help.

19 Campaign Management (Enterprise CRM) – LSI and FSI

Learn to design and manage marketing campaign in Aurea CRM.

CampaignManagement(EnterpriseCRM)overview

The Campaign designer allows you to quickly create a campaign in an intuitive way and uses a graphical representation to make the campaign design process simple.

You can create campaigns and their marketing activities with clear representation of the works flows involved. Campaigns, marketing activities, and response are represented as containers in the graphical view.

Note: Campaign management is an enterprise feature, you need to have enterprise license for Aurea CRM to use this feature.

Components of the Campaign Management:

- Campaign calendar
- Campaign Designer

Working with Campaign Calendar

The campaign calendar shows all the campaigns and marketing activities.

You can start a new campaign from this window by clicking the Create New Campaign button. You can also select and open a campaign shown in this window to open it in the campaign designer.

The following screenshot shows a campaign calendar.

		Channel & Form	at Definition			•
Channel & Format Definition		Define Channel(s)	Define Format	Define Default Values		
*						
Default Values Name: Lock			Internal_x0000006400000	D4d		
*						
Туре	Telephone	~	Status Sci	neduled	~	
Starts on MM	M/DD/YYYY	~	Ends on MM	/DD/YYYY	*	
Starts at			Ends at			
Priority 📌	**		Create To-Do			
Result		~	Private			
Subject						
Subject Details Links	Marketing Activity Survey					
Rep ID		9	Assigned by Rep ID		91	
Participant ID	Required Add a value					
	Optional Add a value					
I.	For Add a value				-	
10	inormation.			Load Default Values Sa	ave Default Values	Proceed

The campaign calendar tab at the top is visible when you open any campaign.

Working with Campaign Designer

You can create, edit, and delete campaigns and their marketing activities in the campaign designer.

You can create a new campaign using an existing campaign as a template or create a new campaign from scratch.

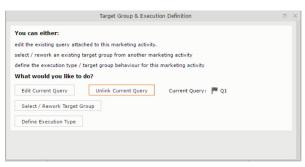
Creating a new campaign from scratch

To create a new campaign from scratch, perform the following steps:

1. Click the Marketing menu icon, and select New Campaign from the menu.

Current Query: 🏴 Q1

2. Click Empty Campaign.

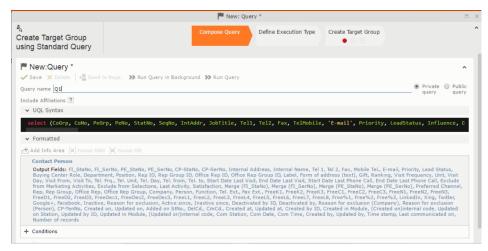


3. Enter the following details in the New Campaign window:

Note: All fields that are in orange are mandatory fields.

- **Name** Enter a name for the campaign. (Mandatory field)
- Starts On Enter the start date of the campaign. (Mandatory field)

- **Type** Select the type of the campaign: Event; Questionnaire; or User Satisfaction. (Mandatory field)
- Target Group Size (Target) Enter the number of recipients expected to participate in the campaign.
- Ends On Enter the end date of the campaign.
- Status Select the status of the campaign. (Mandatory field)
- **Costs**: Enter the estimated cost of the campaign.
- **Currency** Enter the currency in which the campaign cost is estimated.
- **Resp.Rep ID** Enter the ID of the responsible rep for the campaign.
- **Budget approval required** Select the check box if an approval is required for the estimated budget of the campaign.
- Verification required Select the check box if a verification is required for the campaign.
- 4. Click Save. The Campaign Designer opens.



5. To add marketing activity to the campaign, click the context menu on the right of the campaign container. You can select an existing marketing activity or create a new marketing activity from scratch.

		P Query	Q1		
[₽] α Create Target Group using Standard Query		Compose Query	Define Execution Type	Create Target Group	
	One-off, execute selection One-off, do not execute selection One-off, only response processing Repeated, always execute selection/ Repeated, execute selection once Repeated, never execute selection				~
	Repeated, only response processing Repeated, packages Repeated, extend selection/query				

- To use an existing marketing activity:
 - 1. From the context menu select **Reuse Marketing Activity**. The **Reuse Marketing Activity** window opens.
 - 2. Search for the marketing activities from a campaign and select it from the search list.
 - 3. Enter a New Start Date for the marketing activity, in the resulting window.

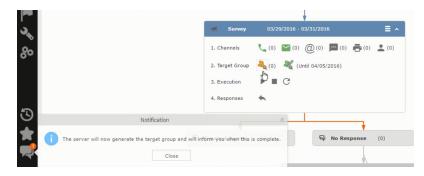
		P Query	Q1		×
್ಡಿ Create Target Group using Standard Query		Compose Query	Define Execution Type	Create Target Group	^
	target group, by clicking the button	n below.		Create Target Group	

Note: If you do not provide a start date for the marketing activity then the start date on the reused marketing activity is used as start date.

4. Click OK. The marketing activity and its descendent marketing activities are added to the campaign designer.

	P Query	Q1	
♣ Create Target Group using Standard Query	Compose Query	Define Execution Type	Create Target Group
Target group cannot be created because of the following reasons: 1. Execution Type has not been defined. 2. Edit target group until date has not been defined. Create Target Group	G		

- 5. Next you can make further additions to the marketing activity.
- To create a new marketing activity:
 - 1. From the context menu select **New Marketing Activity**. The **New Marketing Activity** window opens.



- 2. Enter the following details for the new marketing activity:
 - **Marketing activity** Select the marketing activity type from the following: Confirmation, Event, Follow-up, Invitation, Survey, Survey-remainder. (Mandatory field)
 - Starts on The start date for the marketing activity.
 - Ends-on The end date for the marketing activity.
 - Resp.Rep ID The ID of the rep responsible for the marketing activity.
 - **Costs** The estimated cost of the marketing activity.
 - Currency Select the currency the cost is estimated in.
 - **Text** Provide a description and other relevant information in this text field.
- 3. Click Save to create the new marketing activity container in the campaign



Note: A blue arrow points from the campaign container to the marketing activity container.

- 4. In the next step you need to define some responses for this marketing activity.
- 6. The context menu for the marketing activity container allows you to perform the following: Define responses, Channel and Format definition; Target group and Execution definition; Edit Target group; Notify Rep; Edit/View Responses (Activities); Edit the marketing activity; Delete; Delete (including Generated Record).

In this case we define a response to the survey marketing activity, we have defined.

2

7. Select **Define Responses** from the context menu. A pop-up window is displayed.

			🔓 Edit Target G	iroup		•
Edit Target (Group	Campaign Question Starts on 03/25/2 Ends on 04/06/2	016	Type Questionnaire Status Scheduled	Resp. Rep ID Edit target g 04/05/2016	^
Max. 15 ¥ r	Company Rep ID + Add more		01 ~	Last Name Inactive ? With me	Start Search	
Search Re		active 🗙 Delete 💄 Add Person 💡	Add Person in Co Rep ID	mpany 💄 Add Contact Person 🖡 Response	Add Company 🗸 🚺 🗸 🏟 M	odify List Fields Executed
	immatechi	Orlando Rizzi	Nep 10	Response		Exceded
Zu	ummatechi	Carlene Mcnary				
Zu	immatechi	John Smith			\checkmark	
					×	

Note: The list of available responses are defined in the catalog entries for marketing activities. If no entries are present you get the catalog entries window and you have to define the response catalog entries in that window.

8. Select the responses you want to define and click **OK**. The responses are added to the graph view under marketing activity container.

				🔓 Create Target Grou	p using Quick Query		
	[≜] Create Target Gr using Quick Que		Compose Query	Run Query	Finalize Query	Define Execution Type	Create Target Group
∋ Camp	Root Info Area	Relationship Type	Linked Info Area	Where Field	Logical Operator	Condition Fields	
Cor	ase select desired root in mpany son						

Now you can further define the follow-up marketing activity to the responses defined above.

9. To define a follow-up marketing activity, select the Define Follow-up Marketing Activity from the context menu for the "No Response" container. The New Follow-up Marketing Activity window displays.

	signer					
		÷	Create Target Group u	sing Quick Query		
	A Create Target Group using Quick Query	Compose Query	Run Query	Finalize Query	Define Execution Type	Create Target Group
⊜ Camp		reate the target group, by c	licking the button	below.		

This window gives you the option to create a new follow-up marketing activity or use an existing one.

10.To create a new marketing activity or to reuse an existing one, perform the sub-steps described in step 5. In this case we add a follow-up marketing activity (Survey Reminder) to the No Response marketing activity.

	#a.	Create Target Group us	sing Quick Query		
Create Target Group Ising Quick Query	Compose Query	Run Query	Finalize Query	Define Execution Type	Create Target Group
0				c	reate Target Group
Target group cannot be created beca 1. Target group has already be	-				

11.Next we define the responses to the **Survey Reminder** follow-up marketing activity. Select **Define Responses** from the context menu. The **Responses (Survey Reminder)** window opens.

ಕ್ಷೆ Select/ Group ⊛ Camp	/Rework Target		Construction Select/Rework	Target Group			×
Select/ Group			Select/Rew				
@ Camp			Disco, non	ork Target Group	Execution Definition		^
	Target Groups					7	and All 💿 🖸 🕥
Se	arch Marketing Activities					o ^	
	Marketing Activity Add a val	ue	+ ~	Level			
	Variant Add a val	ue	+ ~	Resp. Rep ID		<u>e</u>	
	+ Add more		~	With me			
Max	x. 5 👻 records per page					Start Search	
Se	earch Results « < 1 - 5 of 5 Marketing Activity	;+ > » 🔓	Marketing Status		Campaign	▲ Campaign	
	Confirmation		Internal_x Scheduled		Spring Promotion Event 2016	Event	
	Event		Scheduled		Source Campaign	Event	
	Event		Scheduled		Spring Promotion Event 2016	Event	
	Follow-up		Scheduled		Spring Promotion Event 2016	Event	
	Invitation		Scheduled		Spring Promotion Event 2016	Event ≪ < 1 - 5 of 5+ > >>	

12.Select Finished and No Response options and click OK.

			₽ _q s	elect/Rework Target Group		
ect/Rewo	ork Target			Select/Rework Target Group	Execution Definition	
✓ Target C	Groups					
Search	Marketing Activities					0 -
Search	Results « < 1 - 5 of 11 >	>>				^
1	Marketing Activity		Marketing	Status	Campaign	Campaign
	Confirmation		Internal_x	Scheduled	Spring Promotion Event 2016	Event
e = ·	Event			Scheduled	Source Campaign	Event
	Event			Scheduled	Spring Promotion Event 2016	Event
	Follow-up			Scheduled	Spring Promotion Event 2016	Event
	Invitation			Scheduled	Spring Promotion Event 2016	Event
						<< < 1 - 5 of 11 > >>
✓ Target (Group Entities					
	Company	Person		Rep ID	Response Generated	Inact Executed
1						

13.Next we want to send the survey reminder to those who have not responded. This loops the defined actions. To do this, select **Define Follow-up marketing activity** from the context menu of the **No Response** container.

	₽ _Q Select/Rework Target Group
್ಧೆ Select/Rework Target Group	Select/Rework Target Group Execution Definition

14.Click Use Existing button.



Note: Since we want to send a survey reminder from the same campaign named "Questionnaire" we restrict the search content to the **Questionnaire** campaign. By changing the **Context** to **Entire Database** you can search for and add marketing activity from other Campaigns. To do that it is recommended that you use the **Re-use Marketing Activity** function described in step 5.

15.Click Start Search and select Survey Reminder from the search result.

	å,	Edit Target Group		
Edit Target Group	Campaign Questionnaire Starts on 03/25/2016 Ends on 04/06/2016	Type Que Status In Pr		25p. Rep ID it target g 04/05/2016
Company Rep ID Rep ID + Add more Max. 15 • records per page	1	Last Name Inactive ? With me		Start Search
Search Results Set Inactive >	🕻 Delete 💄 Add Person 💄 Ad	d Person in Company 🙎 Add Cor	ntact Person 📱 Add Con	npany 🗸 🕅 🗸 🏟 Modify List Fields
Company	Person	Rep ID	Response Generat	ed Inacti Executed
Zummatechi	<u>Orlando Rizzi</u>		~	
Zummatechi	Carlene Mcnary		~	
Zummatechi	John Smith		\checkmark	
	Tonia Mertens		×	

16.Next a confirmation follow-up marketing activity is added to the Finished Survey activity. To do this select Define Follow-up Marketing Activity from the Finished Survey context menu. To create a new marketing activity, perform the sub-steps described in step 5. In this case we add a new follow-up marketing activity (Confirmation) to the Finished Survey activity.

	Campaign Calendar Campaign Designer	
	Define Execution Type	e , ×.
Define Executio	п Туре	
🗸 Proceed		_
*Edit target group until	04/05/2016	~
*Execution Type	One-off, execute selection/query	^
		_
	Repeated, always execute selection/query	
	Repeated, execute selection once	
	✓ Proceed *Edit target group until	Define Execution Type Proceed *Edit target group until 04/05/2016 *Execution Type One-off, execute selection/query One-off, do not execute selection One-off, do not execute selection One-off, always execute selection One-off, always execute selection/query

Viewing a campaign

To view an existing campaign, perform the following:

1. Select Campaigns from the Marketing menu of CRM web.

Campaign Designer / Campaign	
	Campaign Calendar Campaign Designer
ອ Campaign Questionnaire	
	 Questionnaire Scheduled 03/25/2016 - 04/06/2016
	Statistics
	Survey 03/29/2016 - 03/31/2016
	1. Channels 📞 (0) 🔛 (0) @ (ရှ) 🧮 (0) 🚔 (0) 👱 (0)
	2. Target Group $\&_{Q}(0)$
	3. Execution 🕨 🔳 C
	4. Responses
	Finished Survey (0) 🖓 No Response (0)

2. The Search Campaigns window opens. Enter the required criteria and click Search. The search results displays the list of campaigns.

Rq (0)

Notice that the campaigns list shows the status and type of the campaign.

3. Select a campaign and double click it to open it in the campaign designer.

	Target Group	& Execution Definition	>
You can either:			
create a target gro he Quick Query Ge		ith an empty query using the standard Query Generator or	
select / rework an	existing target group from an	nother marketing activity	
define the executio	n type / target group behavio	our for this marketing activity	
What would you	like to do?		
New Query	New Quick Query	Load Query	
	Target Group		
Select / Rework	larget Group		
Select / Rework Define Execution			

Deleting a Campaign from designer

To delete a campaign from a campaign designer:

- 1. Open the campaign in a campaign designer.
- 2. Click the context menu from the campaign container.
- 3. Select the **Delete** option. The Question window pops up with the query "Do you really want to delete the selected record(s)?"
- 4. Click OK to confirm the deletion.

Note:	Please	note	that	this	deletes	the	campaign	along	with	all	the	activities	s in
	mpaign.							0					

Viewing the Campaign Statistics

To view a campaign's statistics:

1. On the Campaign container, click to expand the container. The Statistics button is visible.



2. Click the **Statistics** button or select **Statistic**s from the campaign container context menu.



Note: The statistics shown in the Statistics window is calculated in the Edit Campaign window, as shown in the screenshot below.

*

Viewing a campaign

Learn how to view an existing campaign.

To view an existing campaign, perform the following:

1. Select Campaigns from the Marketing menu of CRM web.

Campaign Designer / Campaign		
	Campaign Calendar Campaign Designer	
·		
	 Questionnaire Scheduled 03/25/2016 - 04/06/2016 	
	Statistics	
	≪ Survey 03/29/2016 - 03/31/2016 Ξ ∧	
	1. Channels 📞 (0) 🎦 (0) @ (A) 💻 (0) 📑 (0) 👱 (0)	
	2. Target Group 🖧 (0) 🦓	
	3. Execution 🕨 🔳 🕑	
	4. Responses 🖌	
	¥¥	
R	Finished Survey (0) Response (0)	

2. The **Search Campaigns** window opens. Enter the required criteria and click **Search**. The search results displays the list of campaigns.

RQ (0)

Notice that the campaigns list shows the status and type of the campaign.

3. Select a campaign and double click it to open it in the campaign designer.

	Target Group	& Execution Definition	
'ou can either:			
reate a target gro he Quick Query Ge		ith an empty query using the standard Query Generato	or or
elect / rework an	existing target group from ar	nother marketing activity	
efine the executio	n type / target group behavi	our for this marketing activity	
	like to do?		
Vhat would you	like to do?		
Vhat would you	like to do?		
Vhat would you New Query Select / Rework	New Quick Query	Load Query	
	New Quick Query Target Group	Load Query	

Creating a new campaign from scratch

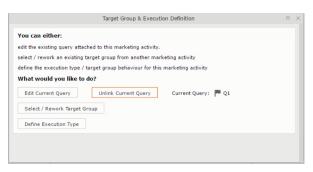
This topic guides you to create a new campaign from scratch.

To create a new campaign from scratch, perform the following steps:

1. Click the Marketing menu icon, and select **New Campaign** from the menu.

Current Query: 🏴 Q1

2. Click Empty Campaign.



3. Enter the following details in the New Campaign window:

Note: All fields that are in orange are mandatory fields.

- Name Enter a name for the campaign. (Mandatory field)
- Starts On Enter the start date of the campaign. (Mandatory field)
- **Type** Select the type of the campaign: Event; Questionnaire; or User Satisfaction. (Mandatory field)
- **Target Group Size (Target)** Enter the number of recipients expected to participate in the campaign.
- Ends On Enter the end date of the campaign.
- Status Select the status of the campaign. (Mandatory field)
- **Costs**: Enter the estimated cost of the campaign.
- **Currency** Enter the currency in which the campaign cost is estimated.
- **Resp.Rep** ID Enter the ID of the responsible rep for the campaign.

- **Budget approval required** Select the check box if an approval is required for the estimated budget of the campaign.
- Verification required Select the check box if a verification is required for the campaign.
- 4. Click Save. The Campaign Designer opens.

		Mew: Que	ery *		
reate Target Group sing Standard Query		Compose Query	Define Execution Type	Create Target Group	
New:Query *					^
Save 🗙 Delete +2 Send t	to Reps 🔊 Run Query in Back	ground 🔊 Run Query			
uery name Q1					🖲 Private 🔘 Public
nclude Affiliations ?					query query
✓ UOL Syntax					
🛨 Add Info Area 🏼 [¥] Group AND)x[Group OR				
Buying Center Role, Departm Day, Visit From, Visit To, Tel. from Marketing Activities, Exit Rep, Rep Group, Office Rep, FreeD1, FreeD2, FreeD3, Free Google+, Facebook, Inactive, (Person), CP-TenNo, Created	SerNo, PE_StaNo, PE_SerNo, CP- tent, Position, Rep ID, Rep Group Frq., Tel. Unit, Tel. Day, Tel. fron clude from Selections, Last Activ Office Rep Group, Company, Per Decl., FreeDec2, FreeDec3, Free Decl., FreeDec3, FreeDec3, Free on, Updated on, Added on StNo pdated in Module, (Updated on)i	b ID, Office Rep ID, Office R n, Tel. to, Start Date Last Vi ity, Satisfaction, Merge (FI_ son, Function, Tel. Ext., Fax el1, FreeL2, FreeL3, FreeL4, nce, Inactive since, Deactiv ., DelCd., CmCd., Created ai	ep Group ID, Label, Form of sit, End Date Last Visit, Start StaNo), Merge (FI_SerNo), N Ext., FreeK1, FreeK2, FreeK FreeL5, FreeL5, FreeL7, Fre ated by ID, Deactivated by, R , Updated at, Created by ID,	address (text), Gift, Ranking, V Date Last Phone Call, End Date 4erge (PE_StaNo), Merge (PE_S 3, FreeC1, FreeC2, Free eL8, Free%1, Free%2, Free%3, teason for exclusion (Company), Created in Module, (Created o	sit Frequency, Unit, Visit Last Phone Call, Exclude erNo), Preferred Channel, EN1, FreeN2, FreeN3, LinkedIn, Xing, Twitter, I, Reason for exclusion njinternal code, Updated
+ Conditions					

5. To add marketing activity to the campaign, click the context menu on the right of the campaign container. You can select an existing marketing activity or create a new marketing activity from scratch.

P Query Q1						
් _ය Create Target Group using Standard Query		Compose Query	Define Execution Type	Create Target Group	^	
V Proceed						
*Edit target group until	04/05/2016				~	
*Execution Type					^	
	One-off, execute selection/query One-off, do not execute selection One-off, only response processing Repeated, always execute selection/ Repeated, execute selection once Repeated, never execute selection Repeated, only response processing Repeated, packages Repeated, extend selection/query	query				

- To use an existing marketing activity:
 - 1. From the context menu select **Reuse Marketing Activity**. The **Reuse Marketing Activity** window opens.
 - 2. Search for the marketing activities from a campaign and select it from the search list.
 - 3. Enter a New Start Date for the marketing activity, in the resulting window.

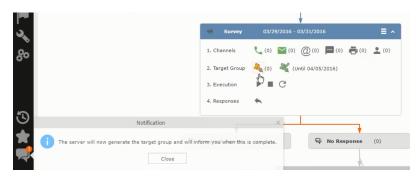
		P Query	01		
^え Create Target Group using Standard Query		Compose Query	Define Execution Type	Create Target Group	
You can now attempt to create the Create Target Group	e target group, by clicking the butto	n below.		Create Target Group	

Note: If you do not provide a start date for the marketing activity then the start date on the reused marketing activity is used as start date.

4. Click OK. The marketing activity and its descendent marketing activities are added to the campaign designer.

	P Query	Q1	
್ಷಿ Create Target Group using Standard Query	Compose Query	Define Execution Type	Create Target Group
Target group cannot be created because of the following reasons: 1. Execution Type has not been defined. 2. Edit target group unbil date has not been defined. Create Target Group	Ą		

- 5. Next you can make further additions to the marketing activity.
- To create a new marketing activity:
 - 1. From the context menu select **New Marketing Activity**. The **New Marketing Activity** window opens.



- 2. Enter the following details for the new marketing activity:
 - Marketing activity Select the marketing activity type from the following: Confirmation, Event, Follow-up, Invitation, Survey, Survey-remainder. (Mandatory field)
 - Starts on The start date for the marketing activity.
 - Ends-on The end date for the marketing activity.
 - **Resp.Rep ID** The ID of the rep responsible for the marketing activity.
 - **Costs** The estimated cost of the marketing activity.

- Currency Select the currency the cost is estimated in.
- **Text** Provide a description and other relevant information in this text field.
- 3. Click **Save** to create the new marketing activity container in the campaign

Note: A blue arrow points from the campaign container to the marketing activity container.

- 4. In the next step you need to define some responses for this marketing activity.
- 6. The context menu for the marketing activity container allows you to perform the following: Define responses, Channel and Format definition; Target group and Execution definition; Edit Target group; Notify Rep; Edit/View Responses (Activities); Edit the marketing activity; Delete; Delete (including Generated Record).

In this case we define a response to the survey marketing activity, we have defined.

×

7. Select **Define Responses** from the context menu. A pop-up window is displayed.

		🔓 Edit Target Group)		•
Edit Target Group	Campaign Question Starts on 03/25/20 Ends on 04/06/20	16	Type Questionnaire Status Scheduled	Resp. Rep ID Edit target g 04/05/2016	^
Company Rep ID		94	Last Name		
+ Add n	nore	~	With me		
Max. 15 🗸 records per page				Start Search	
Search Results	et Inactive 🗙 Delete 💄 Add Person 🌡	Add Person in Compa	ny 💄 Add Contact Person	🛱 Add Company 🗸 🊺 🖌 🏟 M	odify List Fields
Company	Person	Rep ID	Response	Generated Inacti	Executed
Zummatechi	Orlando Rizzi			~	
Zummatechi	Carlene Mcnary			\checkmark	
	<u>Carlene Mcnary</u> John Smith			V V	

Note: The list of available responses are defined in the catalog entries for marketing activities. If no entries are present you get the catalog entries window and you have to define the response catalog entries in that window.

8. Select the responses you want to define and click **OK**. The responses are added to the graph view under marketing activity container.

			🔓 Crea	te Target Group usi	ng Quick Query		
م Create Targe using Quick 0		Compose Query		Run Query	Finalize Query	Define Execution Type	Create Target Group
Camp Root Info Area Please select desired t Company Person Contact Person	Relationship Type	Linked Info Area	where	Where Field	Logical Operator	Condition Fields	

Now you can further define the follow-up marketing activity to the responses defined above.

9. To define a follow-up marketing activity, select the Define Follow-up Marketing Activity from the context menu for the "No Response" container. The New Follow-up Marketing Activity window displays.

		Ą	Create Target Group u	sing Quick Query		
	A Create Target Group using Quick Query	Compose Query	Run Query	Finalize Query	Define Execution Type	Create Target Grou
∋ Camp	You can now attempt to create Target Group	ate the target group, by o	licking the button	below.		

This window gives you the option to create a new follow-up marketing activity or use an existing one.

10.To create a new marketing activity or to reuse an existing one, perform the sub-steps described in step 5. In this case we add a follow-up marketing activity (Survey Reminder) to the No Response marketing activity.

	å.	Create Target Group us	ing Quick Query		
^ຄ ິດ Create Target Group using Quick Query	Compose Query	Run Query	Finalize Query	Define Execution Type	Create Target Group
Target group cannot be created bec	cause of the following reasons:			C	reate Target Group
1. Target group has already	been created.				
Create Target Group					

11.Next we define the responses to the Survey Reminder follow-up marketing activity. Select Define Responses from the context menu. The Responses (Survey Reminder) window opens.

	er					Q• Sean	ch
			₽ _a s	elect/Rework Tar	rget Group	Ξ.	×
	elect/Rework Target roup			Select/Rework	Target Group Execution Definition		^
ອ Camp	✓ Target Groups					-	and All 🕘 😑 🐒
	Search Marketing Act	tivities				÷ ^	
	Marketing Activity	Add a value		+ ~	Level		
	Variant	Add a value		+ ~	Resp. Rep ID	2	
	+	Add more		~	With me		
	Max. 5 👻 records per page					Start Search	
	Search Results « «	N	Marketing	Status	Campaign	▲ Campaign	
	Confirmation		Internal_x	Scheduled	Spring Promotion Event 20	16 Event	
	Event			Scheduled	Source Campaign	Event	
	Event			Scheduled	Spring Promotion Event 20	16 Event	
	Follow-up			Scheduled	Spring Promotion Event 20	16 Event	
	Invitation			Scheduled	Spring Promotion Event 20	16 Event	

12.Select Finished and No Response options and click OK.

			₽ _q s	elect/Rework Target Group		
ect/Rew oup	ork Target			Select/Rework Target Group	Execution Definition	
✓ Target (Groups					
Search	Marketing Activities					o •
Search	Results « < 1 - 5 of 11	> >>				^
1	Marketing Activity		Marketing	Status	Campaign	Campaign
	Confirmation		Internal_x	Scheduled	Spring Promotion Event 2016	Event
通用で	Event			Scheduled	Source Campaign	Event
	Event			Scheduled	Spring Promotion Event 2016	Event
	Event Follow-up			Scheduled Scheduled	Spring Promotion Event 2016 Spring Promotion Event 2016	Event Event
	Follow-up			Scheduled	Spring Promotion Event 2016	Event
	Follow-up Invitation	Person		Scheduled	Spring Promotion Event 2016	Event

13.Next we want to send the survey reminder to those who have not responded. This loops the defined actions. To do this, select **Define Follow-up marketing activity** from the context menu of the **No Response** container.

		Select/Rework Target Group	
ام Select/Rework Target Group		Select/Rework Target Group	Execution Definition
V Proceed			
*Edit target group until	04/05/2016		
*Execution Type	One-off, execute selection/query		

14.Click Use Existing button.



Note: Since we want to send a survey reminder from the same campaign named "Questionnaire" we restrict the search content to the **Questionnaire** campaign. By changing the **Context** to **Entire Database** you can search for and add marketing activity from other Campaigns. To do that it is recommended that you use the **Re-use Marketing Activity** function described in step 5.

15.Click Start Search and select Survey Reminder from the search result.

		🗞 Edit	Target Group		
Edit Target Group		Campaign Questionnaire Starts on 03/25/2016 Ends on 04/06/2016	Type Questic Status In Prog		p ID et g 04/05/2016
Company Rep ID + Ad Max. 15 • records per page	ld more	9 <u>8</u> *	Last Name Inactive ? With me		Start Search
Search Results Company Zummatechi Zummatechi Ummatechi Ummatechi Ummatechi Ummatechi	Set Inactive X Delete Person Orlando Carlene John Sm Tonia Mr	Rep Rizzi Monary iith		Add Company Response Generated	♥ ♥ ♥ ♥ Modify List Fields Inacti Executed

16.Next a confirmation follow-up marketing activity is added to the Finished Survey activity. To do this select Define Follow-up Marketing Activity from the Finished Survey context menu. To create a new marketing activity, perform the sub-steps described in step 5. In this case we add a new follow-up marketing activity (Confirmation) to the Finished Survey activity.

Campaign Designer					
		c	Campaign Calendar	Campaign Designer	
			🛱 Define Executio	on lype	
	Define Executio	on Type			
	V Proceed				
	*Edit target group until	04/05/2016			~
	*Execution Type	One-off, execute select	tion/query		^
		One-off, execute select			
		One-off, do not execut			
		One-off, only response Repeated, always exec			
		Repeated, execute sele			
		Repeated, never execu			
		Repeated, only response	ise processing		
		Repeated, packages			
		Repeated, extend select	ction/query		

Deleting a Campaign from designer

Learn to delete a campaign from designer.

To delete a campaign from a campaign designer:

- 1. Open the campaign in a campaign designer.
- 2. Click the context menu from the campaign container.
- 3. Select the **Delete** option. The Question window pops up with the query "Do you really want to delete the selected record(s)?"
- 4. Click OK to confirm the deletion.

Note: Please note that this deletes the campaign along with all the activities in the campaign.

Viewing the Campaign Statistics

Learn to view campaign statistics.

To view a campaign's statistics:

1. On the Campaign container, click to expand the container. The Statistics button is visible.

	T. C.	
📢 Survey	03/29/2016 - 03/31/2016	≡ ^
1. Channels	(4) (0) (0) (0) (0) (0)	. (0)
2. Target Group	المربح (Until 03/29/2016) 🍇	
3. Execution	▶ (03/29/2016) ■ C	
4. Responses	~	

 Click the Statistics button or select Statistics from the campaign container context menu.

22

Note: The statistics shown in the Statistics window is calculated in the Edit Campaign window, as shown in the screenshot below.

*

Working with Marketing Activities

Learn to work with marketing activities.

Creating a marketing activity involves the following steps:

- 1. Creating channels and formats used in a marketing activity.
- 2. Adding the target groups to the marketing activity, see page 606.
- 3. Defining the execution definition, see page 606.
- 4. Executing a marketing activity, see Executing a Marketing Activity
- 5. Editing and viewing responses to a marketing activity, see Editing/Viewing the Responses for a Marketing Activity

Defining Channels and Formats used in a Marketing Activity

To define the channels and formats for a marketing activity, perform the following steps:

- 1. Open the required campaign in the campaign designer.
- 2. On the marketing activity container, click **OK** to expand the container.

	Question	×
?	Are you sure you want to start the execution of this marketing activity? The preconditions for starting the execution of this campaign step will be checked and if satisfied the execution will start.	
	OK Cancel	

The following screenshot shows the **Survey** marketing activity container.

Last Name F + Add more V Max. 15 V records per page	irst Name With me
+ Add more 🗸	With me
ax. 15 🗸 records per page	Charle Council
	Start Search
earch Results	🖾 ~ 🌣
Type Company Person	Response 1 (Marketing Act.)
Telephone <u>Zummatechi</u> <u>Orlando Riz</u>	<u>zi</u>
Telephone Zummatechi Carlene Mc	mary
Telephone Zummatechi John Smith	
	ens

The following is a brief description of the components of a marketing activity:

Channels - The first row shows the available channels of communication for a marketing activity. The following channels are available:

• Phone

	Last Name			First Name		
	+ Add more		~	With me		
Max. 15	✓ records per page					Start Search
Search	Results					XII ~ 🌣
1	Туре	Company		Person	Response 1 (Mark	eting Act.)
V 0	Telephone	Zummatechi		<u>Orlando Rizzi</u>	Add 5 more	+ ~]
	Telephone	Zummatechi		Carlene Mcnary		
	Telephone	Zummatechi		John Smith		
	Telephone	Lamplanet		Tonia Mertens		

• Letter

all/vi	ew Responses (Activit	ties)			÷ •
	Company				
	Last Name			First Name	
	+ Add more .		~	With me	
ax. 15	✓ records per page				Start Search
earch	n Results				
P	Туре	Company		Person	Response 1 (Marketing Act.)
	Telephone	Zummatechi		<u>Orlando Rizzi</u>	Finished Survey
	Telephone	Zummatechi		Carlene Mcnary	No Response
	Telephone	<u>Zummatechi</u>		John Smith	Finished Survey + ^
	Telephone	Lamplanet		Tonia Mertens	
					Response

• Email

	*
r Survey	03/29/2016 - 03/31/2016
1. Channels	(4) ≥ (0) (0) = (0) = (0) ≥ (0)
2. Target Group	🦓 (4) 🦧 (Until 03/29/2016)
3. Execution	▶ (03/29/2016) ■ C
4. Responses	*
¥	
💐 Finished Survey	(2) 🗧 🖓 No Response (2)
	L. C.
	Survey Reminder 03/29/2016 - 03/31/2016

• SMS

4. Responses	`	
स्थ Finished Survey (2)	No Response (2)
	📢 Survey Ren	ninder 03/29/2016 - 03/31/2016
	1. Channels	L (0) M (0) (0) M (0) L (0)
	 Target Group Execution 	
	4. Responses	*

• Fax

	¥
Survey	03/29/2016 - 03/31/2016
1. Channels	📞 (4) 🔛 (0) @(0) 💻 (0) 📑 (0) 💄 (0)
2. Target Group	🦓 (4) 🛛 🦧 (Until 03/29/2016)
3. Execution	▶ (03/29/2016) ■ C
4. Responses	*
•	
Finished Survey	(2) = No Response (2)
	40
	Survey Reminder 03/29/2016 - 03/31/2

In-person

	₽ ^a a	Edit Target Group		=, ×
Edit Target Group	Campaign Questionnaire Starts on 03/25/2016 Ends on 04/06/2016	Type Ques Status In Pr		^
Company Rep ID + Add more Max. 15 • records per page	9 		Start Search	
Company Per Lamplanet Tor	velete 🙎 Add Person 🙎 Add rson nia Mertens rlene Mcnary	Person in Company 🙎 Add Cor Rep ID Super User Super User	ntact Person () Add Company v () () v () Response Generated Ina No Response No Response	Modify List Fields

The numbers in brackets besides each channel represents the number of target group entities that is processed using this channel.

Target Group – In this step you can define the target groups (customers etc) who are to be the participants of this marketing activity.

Execution – In this step, you can execute and start the marketing activity.

Responses – After the execution of the marketing you can evaluate the responses from participants.

3. Click on any of the channel icons to open the **Channel & Format Definition** window.



The channel and format definition process contains three phases: **Define Channel(s)** > **Define Format** > **Define Default Values**. The window opens on the **Define Channel(s)** phase.

- **Define Channels** In this phase you can select the channels that are used to approach the customers for the marketing activities.
- **Define Format** In this phase you can define the formats to be used for each of the channels you selected in the first phase. For example a template document for an email or fax, the fields that are used in the generation of a letter and similar formats for each of the required channels. The fields you want to include from different CRM info areas in the templates.
- **Define Default values** You can define the default values for the marketing activities that are generated.
- 4. Provide the following information in the **Define Channel(s)** phase:

Format Definition

- Format Name You can give a name to the format definition or retain the automatically generated name. This field is mandatory.
- Lock Select this check box to lock the message format for the marketing activity.
- **Private** Select this check box to keep the message generated for the marketing activity private.

Preferred Channels

• Fixed – You can select one fixed channel.

Note: You cannot select variable channel, if you select a fixed channel.

- **Variable (Priority)** You can select multiple channels with variable priorities for the channels.
- **Generate** This selection generates activities for all entities to represent the successful generation during the marketing activity execution. This is selected by default and cannot be changed.

Save Channel(s) – Click this button to save the Channel format details you configured on this page.

Load Format – Click this button to open the Channel Formats search window. Select the required format previously created, from the search result and load it. You can then edit the format as required.

Proceed – Click this button to go to the next step, **Define Format**.

Note: If you have not saved the channel definition, you are prompted to save the channel configuration details before proceeding.

5. Click Save Channel(s). Click Proceed to open the Define Format window.

C

The Define Format window opens with tabs for each of the channel you selected. You can define the information required for the message formats required for the selected channels by clicking each of the tabs.

Note: The Phone and In-Person channels do not require and further configuration information. The remaining channels Letter, Email, SMS, and Fax require further configuration information you can define in this window. The fields that are in Orange are mandatory fields. If you do not fill the mandatory fields then you can still save the channel format but you cannot execute the channel definition.

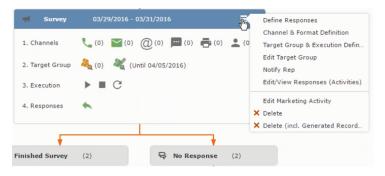
If you do not fill in a mandatory field and save the channel format, then if you go back to the Campaign designer you can see that the channels you selected is not green in color. See the screenshot below. The phone channel is in green color, but the Letter and Email channels are in grey.

	Question	×
?	Are you sure you want to reset the execution of this marketing activity?	
	The target group entities marked as "Generated" will be deleted, and the target group will be generated based on the selection/query attached to the marketing activity (if any). However, the target group entities marked as non Generated will be retained. The "Executed" flag of the target group entities will remain on the same state for all the current target group entities.	is
	OK Cancel	

 Click on the Letter icon and it directly opens the Letter tab in the Define Format process step. Enter the format details of the channels including all the mandatory steps.



7. After providing the required information, click **Save Default Values**. Then click **Proceed** to move to the **Define Default Values** phase.



You provide a **Default Values Name** or use the automatically generated one. You can also search for and load a previously saved default values by using the **Load Default Values** button.

8. After entering the default values, click **Save Default Values** and then click **Proceed** to return to the campaign designer window.

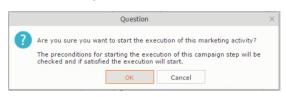
Notify about record		
You can send this record to any other rep and/or external recipient. Please spe	cify what you want to send:	
Recipients: Additional internal recipients:		
Additional Internal recipients:		2
Additional external recipients:		
Subject:		
Survey (In Progress) 03/29/2016		
Body:		
Request a delivery receipt		
Request a read receipt		
	Send	Cancel

Notice that the Phone and Letter channels icons are now in green.

Adding the Target Group and Execution Definition

To define the channels and formats for a marketing activity, perform the following steps:

- 1. Open the required campaign in the campaign designer.
- 2. On the marketing activity container:
 - Click to expand the container.



• Click the target group icon to open the Target Group.

◄ Campaign: Questionnaire; Marketing Activity: Survey	
🛃 Edit 🗸 Save 🖉 Cancel 🗮 Calculate 🖳 🖾 🖏	
Marketing Activity Survey	
Starts on 03/29/2016 Ends on 03/31/2016 Target group size (Target)	
Resp. Rep ID Super User Costs Planned	
Text	

and Execution Definition window.

	Questionnaire; Mar	• •	Survey				
*Marketing Activity	Survey						+ ~
*Starts on	03/29/2016	~	*Ends on	03/31/2016	~	Target group size	
Resp. Rep ID	Super User	01	Costs	<i>k</i> ₂		(Target)	
			Currency		+ ~		
Text							

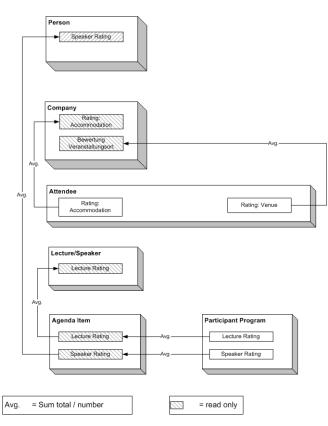
You can create the target group and define execution type using the following buttons:

- New Query Use this to create a target group using the Standard Query process.
- New Quick Query Use this to create a target group using the Quick Query process.
- Load Query Use this to search for and load a query that is already created and saved.
- Select/Rework Target Group Use this to select a different target group or modify the target group.
- Define Execution Type This allows you to define the dates until which the queries are executed to update the target group. You can also define the execution types.

If you were to start creating the target group, but stop in between and reopen this window it also shows the current query you were working on. It now have options to edit or unlink the current query from the marketing activity. For example:

New: Equipme	ent			
✓ Save				
Equipment	Beamer	+ ~		
Description				
Costs			Currency	+ ~
Quantity	1		Equipment Unit	+ ~

the above screenshot shows the current query that was being worked on to create the target group. The flag icon indicates that the current query is a standard type query.



- 3. To create the target groups and define the execution type, perform one of the following:
 - Using the New Query button:
 - 1. Click New Query to open the standard New: Query window.
 - Enter the Query Name and the UQL syntax for the query and run the query to get a list of entities for the target group. These are added to the target group.

Note: Instead of using an UQL, you can specify the infoarea, the fields to search, and the conditions by using the buttons in the Formatted and Conditions sections.

- 3. Click **Save** to proceed to the next step, **Define Execution Type** window. In this window you can specify the following information:
 - Edit target group until Specify the date until the target group can be updated based on the result of the query.
 - Execution Type Select the execution type from the drop-down list.
- 4. Click to open the **Create Target Group** step window.

Export (HTML)				
55 - Shipment cannot be delivered	Ticket 55	5 - B2 - Shipment ca	nnot be delivere	d
55 B - Shipment cannot be delivered 55 - B2 - Shipment cannot be delivered 55 C - Shipment cannot be delivered	E Menu 📝 E	idit 🗸 Save ⊘ Cancel	> Hierarchy Tree	📱 Dispatching Dashboard 🔑
723 - Two items in shipment damaged	End Customer	Krist Intl. OY	Contact Comp	Krist Intl. OY
	End Customer	Mr. Jonne Aaron	Contact Person	Mr. Jonne Aaron
	Subject	Shipment cannot be delive	red No.	55 - B2
	Priority		Status	🔞 Open
	Service Level		Туре	
	Problem Group		Problem	
	Item No.		Item Name	
	Link		Predecessor	55 B - Shipment cannot be delivered
	Problem & Sol	lution Customs informed us they required!	gave us wrong inform	nation. Form No. 2378 is

If any of the items in the previous two steps are incomplete, you get warning messages. For example, if you had not defined the execution type and edit target group until date fields in the Define Execution Type window then Create Target Group window displays the incomplete steps as shown below. Also notice that the Create Target Group tab at the top has a red dot in it instead of a green dot.

- 5. Click **Create Target Group** to complete the creation of the target group process. A notification window along with some progress indicators are created as shown in the screenshot below.

The Target Group icon is now orange in color to indicate that the target group creation is in progress. Also the Target Group row now has date until which the target group list can be updated. Once the target group is processed then the channels and target group icons has the target group numbers in the brackets besides the respective icons.

Once the server creates the target group and updates the marketing activity is to be executed on the date specified. The icons is displayed in green. See the screenshot below.

J C							of 24		<i>.</i>			_		_						_				¥ ~	1.25
				Prio Medi			Subje		Status Open	Created on 19.04.2013	Gabr	Cust	om	eru		Proble				Proc			ID		
ı۵	=			Medi			Probl		Open	05.03.2014	SunT				_	Mainte				_	ko Kar				
	-			- Hour			11001		open	0010012014	<u></u>					Humed	lanc	-		Ruzur				f 24	> >>
24	.04	- 2	6.0	4.20	014		New	Activ	ity					(Э									⊕ [in 4
٤			Apr	2014	1		>	2	Reps		т	'hu 2	4.04	1.20	14		Fri 2	5.04	.201	4	Sat	26.	04.2	014	
N	Mon	Tue	Wed	l Thu	Fri	Sat	Sun				04	08	12	16	20	04	08	12	16	20	04	08	12	16	
4	31	1	2	3	4	5	6		Chris Aki						٩)									
5	7	8	9	10	11	12	13		Dominik I	Landertinger											٩				
6	14	15	16	17	18	19	20		John Doe						٩)									
7	21	22	23	24	25	26	27		Kazuko K	anzaki					1	1									
8	28	29	30	1	2	3	4		Simon Ed	ler					٩) –									
9	5			8					Stephen	Smith					_	1									
		-		13 M			▼ ▼ 2																		
ick	et-re	elate	d rep		uping		Ĭ																		
AC		•		ults ephor			~	•																	
		ject		501101	10		•										5								
	Dura																								
		Unit					~	1																	

6. To edit the target group click . The Edit Target Group window opens. You can use the search queries to add more recipients to the target group.

Note: The target group icon turns Red (⁴⁴) after the "Until" date.

- To create the target groups and define the execution type using the New Quick Query option, perform one of the following:
 - Click the New Quick Query button from the Target Group & Execution Definition window. The Create Target Group using Quick Query window is opened.

👒 CRM.launcher	×
Aurea	
crm.web is requesting following services:	g permission for the
- MailMerge	
- DocumentEdit	
- AppLauncher	
Deny	ок

- 2. Select the Root Info Area from the dropdown list.
- 3. Click Run Query. The query results are listed. Click Finalize Query.
- 4. Define if the query results are Private Query or Public Query. Enter a name in **Save As ...** field.
- 5. Click Save to finalize the results and attach the query results to this marketing activity. The Create Target Group window opens.

Campaign De	ssigner					
		÷.	Create Target Group u	sing Quick Query		
	ಕ್ಷಿ Create Target Group using Quick Query	Compose Query	Run Query	Finalize Query	Define Execution Type	Create Target Group
⊛ Camp	You can now attempt to creat Create Target Group	e the target group, by cl	icking the button l	below.		

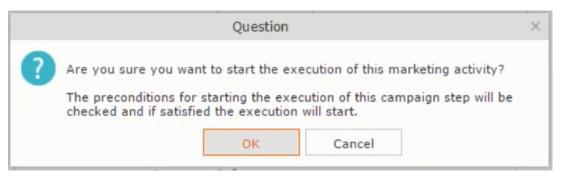
If any of the intermediate process steps are incomplete, you get a warning message, including if the target group is already created. A sample screenshot is provided below:

	a a	Create Target Group us	ng Quick Query		
R Create Target Group	Compose Query	Run Query	Finalize Query	Define Execution Type	Create Target Group
Using Quick Query Target group cannot be created because 1. Target group has already been Create Target Group	-			Cr	eate Target Group

6. Click Create Target Group to complete creating the target group.

Selecting or modifying the target group

- 1. Open the required campaign in the campaign designer.
- 2. On the marketing activity container:
 - Click OK to expand the container.



• Click the target group icon to open the Target Group

	📢 Campaign: Questionnaire; Marketing Activ	ity: Survey	□, ×
dampaign: Questionnaire; Marketing	Activity: Survey		
🔮 Edit 🗸 Save ⊘ Cancel 🗐 Calculate 🖳			
Marketing Activity Survey			
Starts on \$3/29/2016	Ends on 03/31/2016	Target group size (Target)	
Resp. Rep ID Super User	Costs Planned		
Text			

• and Execution Definition window.

	Questionnaire; Marketing Cancel 🗐 Calculate 🖳 🕼		urvey					
*Marketing Activity	Survey							+ ~
*Starts on	03/29/2016	~	*Ends on	03/31/2016		~	Target group size	
Resp. Rep ID	Super User	93	Costs		\square		(Target)	
			Currency			+ ~		
Text								

3. Click Select/Rework Target Group. The Select/Rework Target Group window displays.

			A (Select/Rework Ta	raet Group		×
			4.				<u>^</u>
	elect/Rework Target roup			Select/Reworl	k Target Group Execution Definition		
np	✓ Target Groups					1	and All 🛞
	Search Marketing Activities					0 ·	
	Marketing Activity Add a value			+ ~	Level		
	Variant Add a value			+ ~	Resp. Rep ID	2	
	+ Add more			~	With me		
	Max. 5 👻 records per page					Start Search	
	Search Results « < 1 - 5 of 5+ > 3	» &	Marketing	Status	Campaign	▲ Campaign	
	Confirmation		Internal_x	Scheduled	Spring Promotion Event 2016	Event	
	Event			Scheduled	Source Campaign	Event	
	Event			Scheduled	Spring Promotion Event 2016	Event	
	Follow-up			Scheduled	Spring Promotion Event 2016	Event	
	Invitation			Scheduled	Spring Promotion Event 2016	Event	

4. You can search for marketing activities and select the desired marketing activity. The target group entities for the selected marketing activity are listed below.

			₽ _q S	elect/Rework Target Group		
ect/Rev up	work Target			Select/Rework Target Group	Execution Definition	
✓ Targel	t Groups					-
Search	n Marketing Activitie	s				o •
Search	n Results 《〈1-50	f11 > >>				^
	Marketing Activity		Marketing	Status	Campaign	Campaign
	Confirmation		Internal_x	Scheduled	Spring Promotion Event 2016	Event
e = ·	✓ Event			Scheduled	Source Campaign	Event
₽E.	v Event Event			Scheduled Scheduled	Source Campaign Spring Promotion Event 2016	Event
e = ·						
e = ·	Event			Scheduled	Spring Promotion Event 2016	Event
U U U U U	Event Follow-up			Scheduled Scheduled	Spring Promotion Event 2016 Spring Promotion Event 2016	Event Event
	Event Follow-up			Scheduled Scheduled	Spring Promotion Event 2016 Spring Promotion Event 2016	Event Event Event
	Event Follow-up Invitation	Person		Scheduled Scheduled	Spring Promotion Event 2016 Spring Promotion Event 2016	Event Event Event

5. Double click on the marketing activity to add the target group from the selected marketing activity to the target group of the current marketing activity. The Execution Definition window displays.

	a Select/Rework Target Group
್ಡಿ Select/Rework Target Group	Select/Rework Target Group Execution Definition
Proceed *Edit target group until *Execution Type	4/05/2016 Dine-Off, execute selection/query

- 6. Specify the following information:
 - Edit target group until Specify the date until the target group can be updated.
 - Execution Type Select the execution type from the drop-down list.

7. Click Proceed. The campaign designer window opens.



8. Click **I** to view the newly added participant to the target group.

			🖧 Edit Target	Group		
Edit Target Group		Campaign Quest Starts on 03/25 Ends on 04/06	5/2016	Type Questionnair Status In Progress		D 04/05/2016
Comp Reg Max. 15 🗸 records pe	+ Add more		9 <u>1</u> ~	Last Name Inactive ? With me	S	Start Search
Search Results	Set Inactive 🗙	Delete 💄 Add Person	Add Person in	Company 🙎 Add Contact Per	rson 🗒 Add Company 🗸	🛛 🔽 🗸 🛛 🏟 Modify List Fields
Company		erson	Rep ID	Respo		
Zummatech	<u>ii 0</u>	rlando Rizzi			~	
Zummatech	i <u>C</u>	arlene Mcnary			~	
Zummatech	ii Jo	hn Smith			~	
Lamplanet	.fba	onia Mertens			~	
	Ü					

Defining Execution Type

To define an execution type, perform the following:

- 1. Open the required campaign in the campaign designer.
- 2. On the marketing activity container:
 - Click OK to expand the container.

	Question	×
?	Are you sure you want to start the execution of this marketing activity? The preconditions for starting the execution of this campaign step will be checked and if satisfied the execution will start.	
	OK Cancel	

• Click the target group icon to open the Target Group

	📢 Campaign: Questionnaire; Marketing Activity	y: Survey	□, ×
← Campaign: Questionnaire; Marketi			
Marketing Activity Survey Starts on p3/29/2016	Ends on 03/31/2016	Target group size (Target)	
Resp. Rep ID <u>Super User</u> Text	Costs Planned		

• and Execution Definition window.

	Questionnaire; Marketing Cancel 🖩 Calculate 🖳 🖉		urvey				
*Marketing Activity	Survey						+ ~
*Starts on	03/29/2016	~	*Ends on	03/31/2016	~		
Resp. Rep ID	Super User	93	Costs		6	(Target)	
			Currency		+ ~		
Text							
101							

- 3. Specify the following information:
 - Edit target group until Specify the date until the target group can be updated.
 - Execution Type Select the execution type from the drop-down list.
- 4. Click Proceed. The campaign designer window opens.



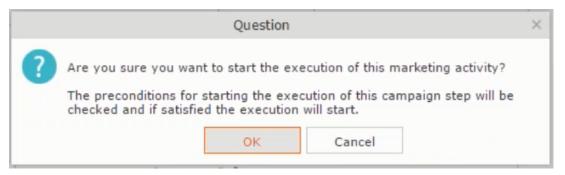
Executing a Marketing Activity

To execute a marketing activity, the following conditions should be met:

- All the selected channels and their formats should be defined. The selected channel icons would be green in color.
- The target groups should be defined. The Target group icons would be green in color.
- The current date should be within the scope of the start and end dates of the campaign.
- The "Edit target group until date" has to be defined. This date is visible besides the edit target group icon (I).

To execute a marketing activity, perform the following steps:

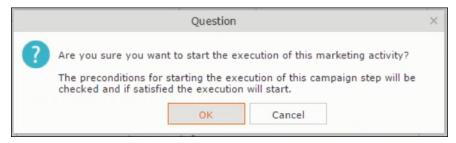
- 1. Open the required campaign in the campaign designer.
- 2. On the marketing activity container:
 - Click OK to expand the container.



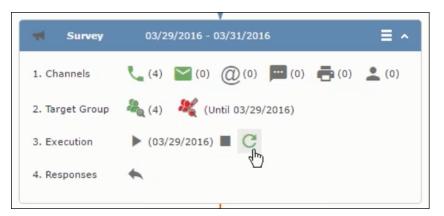
• The following screenshot shows the **Survey** marketing activity container.

Company Last Name + Add more			Kesponses	(Activities)			
Last Name First Name + Add more With me Hax. 15 ~ records per page Start Search Search Results Start Search * Type Company Person Response 1 (Marketing Act.) * Telephone Zummatechi Orlando Rizzi Telephone Zummatechi Carlene Mcnary Telephone Zummatechi John Smith	Edit/View	Responses (Activities)			¢ ^		
+ Add more With me Hax. 15 • records per page Start Search Search Results Search Results		Company					
Start Search Start Search <th colspan="2" start<="" th=""><th></th><th>Last Name</th><th></th><th>First Name</th><th></th></th>	<th></th> <th>Last Name</th> <th></th> <th>First Name</th> <th></th>			Last Name		First Name	
Search Results Type Company Person Response 1 (Marketing Act.) Telephone Zummatechi Orlando Rizzi Telephone Zummatechi Carlene Monary Telephone Zummatechi Dahn Smith		+ Add more	¥	With me			
Type Company Person Response 1 (Marketing Act.) Telephone Zummatechi Orlando Rizzi Telephone Zummatechi Carlene Monary Telephone Zummatechi John Smith	lax. 15 🗸	records per page			Start Search		
Type Company Person Response 1 (Marketing Act.) Telephone Zummatechi Orlando Rizzi Telephone Zummatechi Carlene Monary Telephone Zummatechi John Smith							
Telephone Zummatechi Orlando Rizzi Telephone Zummatechi Carlene Monary Telephone Zummatechi John Smith	Search Re	esults			X - 0		
Telephone Zummatechi Carlene Mcnary Telephone Zummatechi John Smith	(¹m) ∨ Ту	ype	Company	Person	Response 1 (Marketing Act.)		
Telephone Zummatechi John Smith	🖉 🗮 🗸 Те	elephone	Zummatechi	<u>Orlando Rizzi</u>			
	Te	elephone	Zummatechi	Carlene Mcnary			
Telephone Lamplanet Tonia Mertens	Te	elephone	Zummatechi	John Smith			
	Te	elephone	Lamplanet	Tonia Mertens			

3. Click the ► button on the **Execution** row. A query window pops up asking you to confirm the operation.



4. Click **OK**. A server notification informs you that the marketing activity has started and informs you when it is completed.



The Execute button is now greyed and the date on which the execution starts automatically is displayed in brackets besides it.

Note: The edit target group icon is now in red ($\overset{\&}{}$). The abort button is greyed out once the execution starts. And reset button is now activated. The Responses button remains grey until the all the participants have responded.

Editing/Viewing the Responses for a Marketing Activity

To edit or view the responses for a marketing activity, perform the following steps:

1. Click icon in the responses row. The Edit/View Response (Activities) window opens.

[Edit/V	iew Responses	(Activities)			×
	Edit/View Responses (Activities)				0	^	
	Company Last Name			First Name			
	+ Add more		~	With me			
	Max. 15 💙 records per page				Start Search	1	
	Search Results				XIV	ø	
	Type	Company		Person	Response 1 (Marketing Act.)		
	Telephone	<u>Zummatechi</u>		<u>Orlando Rizzi</u>			
	Telephone	Zummatechi		Carlene Mcnary			
	Telephone	Zummatechi		John Smith			
	Telephone	Lamplanet		Tonia Mertens			

You can search for specific participants and view/edit their responses.

2. Select a row and click on Response 1 (Marketing Act.) column to activate and record the response.

		Keit/View F	Responses (Activities)	r.
dit/Vi	ew Responses (Activiti	es)		¢ ^
	Company			
	Last Name		First Name	
	+ Add more		♥ With me	
ax. 15	✓ records per page			Start Search
earch	n Results			
P	Туре	Company	Person	Response 1 (Marketing Act.)
10	Telephone	<u>Zummatechi</u>	<u>Orlando Rizzi</u>	Add 5 more + V
	Telephone	Zummatechi	Carlene Mcnary	
	Telephone	Zummatechi	John Smith	
	Telephone	Lamplanet	Tonia Mertens	
	Telephone	Lamplanet	<u>Ionia Mertens</u>	
	Telephone	<u>Lamplanet</u>	<u>Ionia Mertens</u>	
	Telephone	<u>Lamplanet</u>	Ionia Mertens	

3. Click the drop-down list to select the response type. Click on the + button to add more response types to the response catalogue entries.

dit/View	Responses (Activities)			
				\$ ^
	Company			
	Last Name		First Name	
	+ Add more		✓ With me	
ax. 15 🗸	records per page			Start Search
earch R	esults			
<u>Р</u> т	Туре	Company	Person	Response 1 (Marketing Act.)
т	Telephone	Zummatechi	Orlando Rizzi	Finished Survey
Т	Telephone	Zummatechi	Carlene Mcnary	No Response
	Telephone	<u>Zummatechi</u>	<u>John Smith</u>	Finished Survey + ^
т	Telephone	Lamplanet	Tonia Mertens	
				Response

Edit the responses for all the participants.

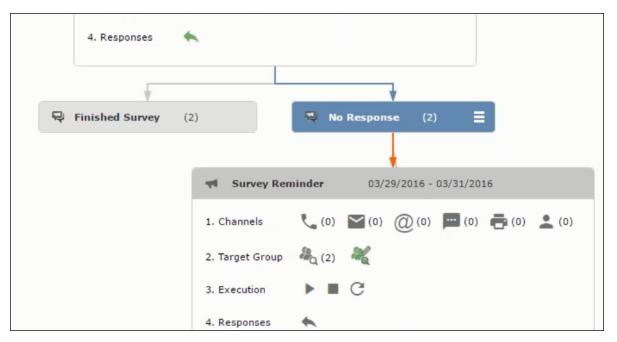
4. Close the window to come back to the campaign manager window. The response icon is be green in color. This shows that response for all the participants is recorded.

	*
Survey	03/29/2016 - 03/31/2016
1. Channels	(4) (0) (0) (0) (0) (0) (0) (0) (0)
2. Target Group	المعلى (Until 03/29/2016) 🍇 🖓
3. Execution	▶ (03/29/2016) ■ C
4. Responses	*
· · · ·	
Finished Survey	(2)
	- Long
	Survey Reminder 03/29/2016 - 03/31/201
	4

Notice the "(2)" in the response containers for the Survey marketing activity: **Finished Survey** and **No Response** show. This indicates that two participants completed the survey and two members did not respond.

5. Click the button to expand the **Survey Reminder** follow-up marketing activity container for those participants who did not respond to the Survey.

	Question	×
?	Are you sure you want to start the execution of this marketing activity? The preconditions for starting the execution of this campaign step will be checked and if satisfied the execution will start.	



You can see that two participants who did not respond are already added to the target group of the follow-up marketing activity.

6. Click to open the Edit Target Group window for the Survey Reminder follow-up marketing activity.

		🖧 Edit Target Group			Ξ.
Edit Target Group	Campaign Question Starts on 03/25/20 Ends on 04/06/20	16	Type Questionnaire tatus In Progress	Resp. Rep ID Edit target g	
Company		Las	t Name		
Rep ID		<u>2</u> I	nactive ?		
+ Add	more	~ V	/ith me		
Max. 15 👻 records per page				Start Search	
Search Results	iet Inactive 🗙 Delete 💄 Add Person 🌡	Add Person in Company	Add Contact Person	Add Company 🗸 🕅 🗸 d	🛱 Modify List Fields
Company	Person	Rep ID	Response	Generated Ina	acti Executed
Lamplanet	Tonia Mertens	Super User	No Response		
Zummatechi	Carlene Mcnary	Super User	No Response		

You can see that the two members with "No Response" in the **Response** column are listed.

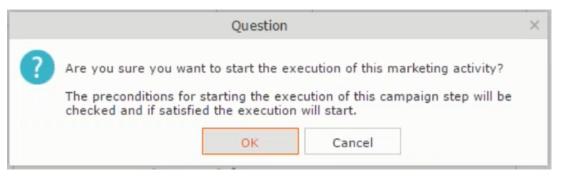
Resetting the Marketing Activity Execution

Restarting a marketing activity is possible if the marketing activity execution is completed. It results in the following:

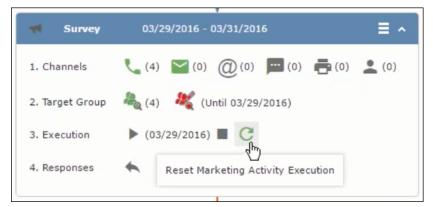
- All generated target group entities marked as "Generated" are deleted.
- The target group entities marked as "non Generated" are retained.
- The target group entities are regenerated based on the selection/query attached to this marketing activity.
- The target group entities that are marked as executed remains in the same state for the current target group.

To reset a marketing activity execution, perform the following:

- 1. Open the required campaign in the campaign designer.
- 2. On the marketing activity container, click to expand the container.

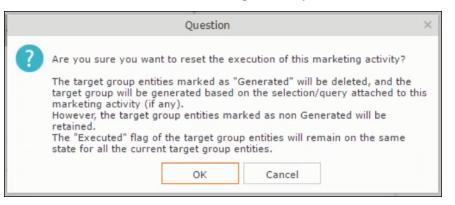


The following screenshot shows the **Survey** marketing activity container.



Notice that the execution button and the abort button are in grey. The reset button is in green and is active.

3. Click ^{CC} to reset the marketing activity execution. A confirmation window displays.



 Click OK. The target group is reset and the target group is regenerated. The edit target group until date is reset.

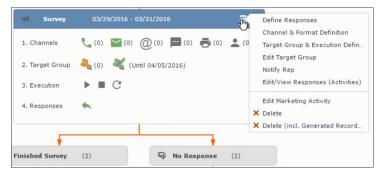
M Survey	03/29/2016 - 03/31/2016
1. Channels	(0)
2. Target Group	ዲ (0) 🛛 💐 (Until 04/05/2016)
3. Execution	▶ ■ C
4. Responses	*

Notice that the Target group button is yellow and once the target group generation is completed, the execution button is active and ready for execution. The colors of the target group icon and execute button are in green.

Notifying Reps about a marketing activity

To notify reps, perform the following:

1. From the context menu of a marketing activity container, select **Notify Rep**.



2. The Notify about record opens.

Notify	about record		
You can send this record to any other rep and/or extern Recipients:	rnal recipient. Please spe	ecify what you want to send:	
Additional internal recipients:			9
Additional external recipients:			
Subject: Survey (In Progress) 03/29/2016			
Body:			
✓ Insert Aurea CRM web link			
Request a delivery receipt			
Request a read receipt			
		Send	Cancel

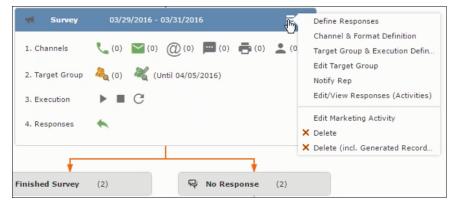
Enter the following information:

- **Recipients** Add the internal and external recipients (reps) who receive the notification.
- **Subject** Edit the subject of the notification email in this text field. You can also use the automatically generated subject.
- **Body** Enter the notification content in the Body field.
- Insert Aurea CRM web link Select this checkbox if you want to add the company URL in the notification.
- Request a delivery receipt Select this checkbox if you want a receipt of delivery.
- **Request a read receipt** Select this checkbox if you want to know if the notification was read by the recipient.
- 3. Click **Send** to send the notification to the selected reps.

Editing a Marketing Activity

To edit a marketing activity, perform the following:

- 1. Open the required campaign in the campaign designer.
- 2. From the context menu of a marketing activity container, select Edit Marketing Activity.



3. The marketing activity window opens.

	📢 Campaign: Questionnaire; Marketing Activit	y: Survey	□, ×
Campaign: Questionnaire; Marketin Cate of the save of the calculate of the save of the calculate of the save of t			
Marketing Activity Survey			
Starts on \$2/29/2016	Ends on 03/31/2016	Target group size (Target)	
Resp. Rep ID Super User	Costs Planned		
Text			

4. Click Edit to start editing the marketing activity.

	Questionnaire; Marketing A Cancel Calculate Calculate Cancel Ca		irvey					+ ~
*Starts on	03/29/2016	~	*Ends on	03/31/2016		¥	Target group size (Target)	
Resp. Rep ID	Super User	93	Costs		R		(luiget)	
			Currency		+	~		
Text								

5. Make the required changes and click Save.

Defining Channels and Formats used in a Marketing Activity

To define the channels and formats for a marketing activity, perform the following steps:

- 1. Open the required campaign in the campaign designer.
- 2. On the marketing activity container, click OK to expand the container.

	Question	×
?	Are you sure you want to start the execution of this marketing activity? The preconditions for starting the execution of this campaign step will be checked and if satisfied the execution will start.	
	OK Cancel	

The following screenshot shows the **Survey** marketing activity container.

dit/Vie	w Responses (Activiti	es)		\$ A
	Company			
	Last Name		First Name	
	+ Add more		✓ With me	
ax. 15	 records per page 			Start Search
earch	Results			X - X
ĥ, ∽	Туре	Company	Person	Response 1 (Marketing Act.)
	Telephone	Zummatechi	<u>Orlando Rizzi</u>	
	Telephone	Zummatechi	Carlene Mcnary	
	Telephone	Zummatechi	John Smith	
	Telephone	Lamplanet	Tonia Mertens	

The following is a brief description of the components of a marketing activity:

Channels - The first row shows the available channels of communication for a marketing activity. The following channels are available:

• Phone

	Last Name			First Name		
	+ Add more		~	With me		
lax. 15	✓ records per page					Start Search
Search	Results					XII ~ 🌣
	Туре	Company		Person	Response 1 (Market	ing Act.)
v 0	Telephone	<u>Zummatechi</u>		<u>Orlando Rizzi</u>	Add 5 more	+ ~]
	Telephone	Zummatechi		Carlene Mcnary		
	Telephone	Zummatechi		John Smith		
	Telephone	Lamplanet		Tonia Mertens		

• Letter

			ew Responses (A		
dit/Vie	ew Responses (Activi	ties)			o ~
	Company				
	Last Name			First Name	
	+ Add more		~	With me	
ax. 15	 records per page 				Start Search
earch	Results				XI - 🗘
1	Туре	Company		Person	Response 1 (Marketing Act.)
	Telephone	Zummatechi		Orlando Rizzi	Finished Survey
	Telephone	Zummatechi		Carlene Mcnary	No Response
10	Telephone	<u>Zummatechi</u>		John Smith	Finished Survey + ^
	Telephone	Lamplanet		Tonia Mertens	
					Response

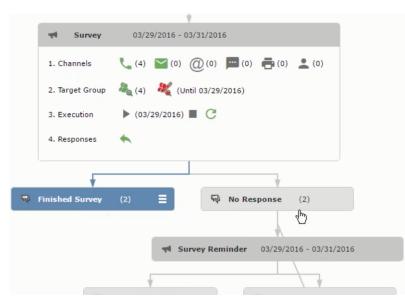
• Email

	¥
rt Survey	03/29/2016 - 03/31/2016
1. Channels	🐛 (4) 🔛 (0) @(0) 🔲 (0) 🚔 (0) 💄 (0)
2. Target Group	ዲ (4) 🛛 🦧 (Until 03/29/2016)
3. Execution	▶ (03/29/2016) ■ C
4. Responses	*
Finished Survey	(2) = No Response (2)
rinisheu Survey	
	Survey Reminder 03/29/2016 - 03/31/201

• SMS

4. Responses 🔶	
Finished Survey (2	2) 🐱 No Response (2) 🚍
4	
	Survey Reminder 03/29/2016 - 03/31/2016
	1. Channels 📞 (0) 🎦 (0) @ (0) 🚍 (0) 🚔 (0) 👤 (0)
	2. Target Group 🦓 (2)
	3. Execution 🕨 🔳 C
	4. Responses 📉 🍋

• Fax



In-person

	#	Edit Target Group		□, ×
Edit Target Group	Campaign Questionnaire Starts on 03/25/2016 Ends on 04/06/2016	Type Ques Status In Pr		^
Company Rep ID + Add more Max. 15 • records per page	<u></u>		Sta	irt Search
Company F	Person Tonia Mertens	l Person in Company 🙎 Add Cor Rep ID Super User	ntact Person 🗒 Add Company 🛩 Response Generated No Response	☑ ∨ ✿ Modify List Fields Inacti Executed
Zummatechi	Carlene Mcnary	Super User	No Response	

The numbers in brackets besides each channel represents the number of target group entities that is processed using this channel.

Target Group – In this step you can define the target groups (customers etc) who are to be the participants of this marketing activity.

Execution – In this step, you can execute and start the marketing activity.

Responses – After the execution of the marketing you can evaluate the responses from participants.

3. Click on any of the channel icons to open the **Channel & Format Definition** window.



The channel and format definition process contains three phases: **Define Channel(s)** > **Define Format** > **Define Default Values**. The window opens on the **Define Channel(s)** phase.

- **Define Channels** In this phase you can select the channels that are used to approach the customers for the marketing activities.
- **Define Format** In this phase you can define the formats to be used for each of the channels you selected in the first phase. For example a template document for an email or fax, the fields that are used in the generation of a letter and similar formats for each of the required channels. The fields you want to include from different CRM info areas in the templates.
- **Define Default values** You can define the default values for the marketing activities that are generated.
- 4. Provide the following information in the Define Channel(s) phase:

Format Definition

- Format Name You can give a name to the format definition or retain the automatically generated name. This field is mandatory.
- Lock Select this check box to lock the message format for the marketing activity.
- **Private** Select this check box to keep the message generated for the marketing activity private.

Preferred Channels

• **Fixed** – You can select one fixed channel.

Note: You cannot select variable channel, if you select a fixed channel.

- Variable (Priority) You can select multiple channels with variable priorities for the channels.
- **Generate** This selection generates activities for all entities to represent the successful generation during the marketing activity execution. This is selected by default and cannot be changed.

Save Channel(s) – Click this button to save the Channel format details you configured on this page.

Load Format – Click this button to open the Channel Formats search window. Select the required format previously created, from the search result and load it. You can then edit the format as required.

Proceed – Click this button to go to the next step, **Define Format**.

Note: If you have not saved the channel definition, you are prompted to save the channel configuration details before proceeding.

5. Click Save Channel(s). Click Proceed to open the Define Format window.

C

The Define Format window opens with tabs for each of the channel you selected. You can define the information required for the message formats required for the selected channels by clicking each of the tabs.

Note: The Phone and In-Person channels do not require and further configuration information. The remaining channels Letter, Email, SMS, and Fax require further configuration information you can define in this window.

The fields that are in Orange are mandatory fields. If you do not fill the mandatory fields then you can still save the channel format but you cannot execute the channel definition.

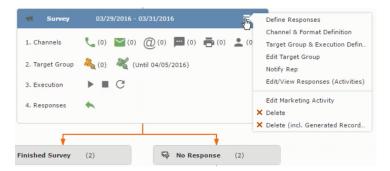
If you do not fill in a mandatory field and save the channel format, then if you go back to the Campaign designer you can see that the channels you selected is not green in color. See the screenshot below. The phone channel is in green color, but the Letter and Email channels are in grey.

	Question ×
?	Are you sure you want to reset the execution of this marketing activity? The target group entities marked as "Generated" will be deleted, and the target group will be generated based on the selection/query attached to this marketing activity (if any). However, the target group entities marked as non Generated will be retained. The "Executed" flag of the target group entities will remain on the same state for all the current target group entities.
	OK Cancel

 Click on the Letter icon and it directly opens the Letter tab in the Define Format process step. Enter the format details of the channels including all the mandatory steps.

📢 Survey	03/29/2016 - 03/31/2016
1. Channels	L (0) M (0) (0) (0) (0) (0) (0)
2. Target Group	ዲ (0) 🛛 💐 (Until 04/05/2016)
3. Execution	▶ ■ C
4. Responses	*

7. After providing the required information, click **Save Default Values**. Then click **Proceed** to move to the **Define Default Values** phase.



You provide a **Default Values Name** or use the automatically generated one. You can also search for and load a previously saved default values by using the **Load Default Values** button.

8. After entering the default values, click **Save Default Values** and then click **Proceed**. You are returned to the campaign designer window.

	Notify about record		
You can send this record to any other rep	p and/or external recipient. Please spec	cify what you want to send:	
Recipients:			
Additional internal recipients:			9
Additional external recipients:			
Subject:			
Survey (In Progress) 03/29/2016			
✓ Insert Aurea CRM web link			
Request a delivery receipt Request a read receipt			

Notice that the Phone and Letter channels icons are now in green.

Adding the Target Group and Execution Definition

To define the channels and formats for a marketing activity, perform the following steps:

- 1. Open the required campaign in the campaign designer.
- 2. On the marketing activity container:
 - Click to expand the container.

	Question	×
?	Are you sure you want to start the execution of this marketing activity? The preconditions for starting the execution of this campaign step will be checked and if satisfied the execution will start.	
	OK Cancel	

• Click the target group icon to open the Target Group.

	📢 Campaign: Questionnaire; Marketing Activity	: Survey	□, ×
🖪 Campaign: Questionnaire; Market	ing Activity: Survey		
🐔 Edit 🖌 Save 🖉 Cancel 🖩 Calculate 🛽			
Marketing Activity Survey			
Starts on \$2/29/2016	Ends on 03/31/2016	Target group size (Target)	
Resp. Rep ID Super User	Costs Planned		
Text			

and **Execution Definition** window.

	Questionnaire; Ma	rketing Activity: Su 🗉 🗈 🕼	irvey				
*Marketing Activity	Survey						+ ~
*Starts on	03/29/2016	~	*Ends on	03/31/2016	~	Target group size	
Resp. Rep ID	Super User	91	Costs	\searrow		(Target)	
			Currency		+ ~		
Text							

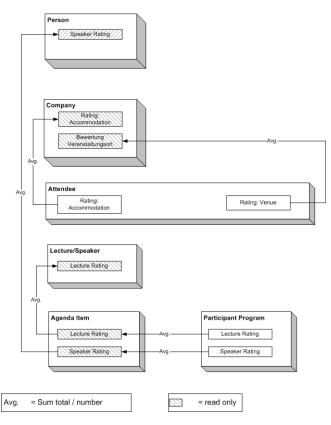
You can create the target group and define execution type using the following buttons:

- New Query Use this to create a target group using the Standard Query process.
- New Quick Query Use this to create a target group using the Quick Query process.
- Load Query Use this to search for and load a query that is already created and saved.
- Select/Rework Target Group Use this to select a different target group or modify the target group.
- Define Execution Type This allows you to define the dates until which the queries are executed to update the target group. You can also define the execution types.

If you were to start creating the target group, but stop in between and reopen this window it also shows the current query you were working on. It now have options to edit or unlink the current query from the marketing activity. For example:

New: Equipme	ent			
✓ Save				
Equipment	Beamer	+ ~		
Description				
Costs			Currency	+ ~
Quantity	1		Equipment Unit	+ ~

the above screenshot shows the current query that was being worked on to create the target group. The flag icon indicates that the current query is a standard type query.



- **3.** To create the target groups and define the execution type, perform one of the following:
 - Using the New Query button:
 - 1. Click New Query to open the standard New: Query window.
 - 2. Enter the **Query Name** and the **UQL syntax** for the query and run the query to get a list of entities for the target group. These are added to the target group.

Note: Instead of using an UQL, you can specify the infoarea, the fields to search, and the conditions by using the buttons in the Formatted and Conditions sections.

- 3. Click **Save** to proceed to the next step, **Define Execution Type** window. In this window you can specify the following information:
 - Edit target group until Specify the date until the target group can be updated based on the result of the query.
 - Execution Type Select the execution type from the drop-down list.

4. Click to open the **Create Target Group** step window.

Export (HTML)										
55 - Shipment cannot be delivered	Ticket 55 - B2 - Shipment cannot be delivered									
55 B - Shipment cannot be delivered 55 - B2 - Shipment cannot be delivered 55 C - Shipment cannot be delivered	= Menu ✔ Edit ✓ Save ⊘ Cancel → Hierarchy Tree Dispatching Dashboard Æ									
223 - Two items in shipment damaged	End Customer K	rist Intl. OY	Contact Comp	Krist Intl. OY						
	End Customer M	r. Jonne Aaron	Contact Persor	Mr. Jonne Aaron						
	Subject S	hipment cannot be delivere	ed No	. 55 - B2						
	Priority		Status	s 🔞 Open						
	Service Level		Туре	5						
	Problem Group		Problem	1						
	Item No.		Item Name	e						
	Link		Predecesso	r <u>55 B - Shipment cannot be</u> <u>delivered</u>						
	Problem & Solut	ion								

If any of the items in the previous two steps are incomplete, you get warning messages. For example, if you had not defined the execution type and edit target group until date fields in the Define Execution Type window then Create Target Group window displays the incomplete steps as shown below. Also notice that the Create Target Group tab at the top has a red dot in it instead of a green dot.

5. Click **Create Target Group** to complete the creation of the target group process. A notification window along with some progress indicators are created as shown in the screenshot below.

The Target Group icon is now orange in color to indicate that the target group creation is in progress. Also the Target Group row now has date until which the target group list can be updated. Once the target group is processed then the channels and target group icons has the target group numbers in the brackets besides the respective icons.

Once the server creates the target group and updates the marketing activity is to be executed on the date specified. The icons are displayed in green. See the screenshot below.

								>															_	26	/ 🌣
	·			Prio			Subj		Status	Created on			om	er C						Processed by ID					
	_	_		Medi					Open	19.04.2013	Gabr	_			_	Monitor				_	er Park				
٤		♥ 1	23	Medi	um		Prob	lem	Open	05.03.2014	<u>SunT</u>	<u>ea</u>				Mainter	nanc	e		<u>Kazı</u>	uko Ka			6.0.4	
_												_	_	_	_						~~	< 1	- 5 0	of 24	, ,,
24	.04	- 2	5 . 0	4.20)14		New	Activi	ty					(9									÷ ا	Eşi 🕯
<			Apr	2014	ı		>	2	Reps		т	hu 2	4.04	1.20	14	F	Fri 2	5.04	.201	4	Sa	t 26.	04.2	2014	
W	Mon	Tue	Wed	Thu	Fri	Sat	Sun				04	08	12	16	20	04	08	12	16	20	04	08	12	16	
14	31	1	2	3	4	5	6		Chris Aki						٩	1					I.	I			
15	7	8		10					Dominik L	andertinger												6			
				17			20		John Doe						٩	1									
17 18	21 28	22		24 1		26 3			Kazuko Ka	anzaki															
10 19	5			8					Simon Ede	er					٩) – –									
				13 M					Stephen	Smith															
		uuy.	Tue	10 10	.uy, .		~ 🔻																		
							v 🚊																		
Gro	up re	eps b	y No	grou	uping)	~																		
Tick	cet-re	elated	l rep)																					
Act	tivit	y De	efai	ılts				4																	
	т	уре	Tele	phon	ne		~										1								
	Sub	ject															20								
	Dura	tion																							
		Unit					~																		
		ose																							

6. To edit the target group click . The Edit Target Group window opens. You can use the search queries to add more recipients to the target group.

Note: The target group icon turns Red (⁴⁴) after the "Until" date.

- To create the target groups and define the execution type using the New Quick Query option, perform one of the following:
 - 1. Click the New Quick Query button from the Target Group & Execution Definition window. The Create Target Group using Quick Query window is opened.

🗟 CRM.	launcher		\times
A	urea		
	n.web is requesting pe llowing services:	rmission for the	
- N	lailMerge		
- 0	ocumentEdit		
- A	ppLauncher		
	Deny	ОК	

- 2. Select the Root Info Area from the dropdown list.
- 3. Click Run Query. The query results are listed. Click Finalize Query.
- 4. Define if the query results are Private Query or Public Query. Enter a name in **Save As ...** field.
- 5. Click Save to finalize the results and attach the query results to this marketing activity. The Create Target Group window opens.

Campaign De	signer					
		ł	Create Target Group u	sing Quick Query		
	A Create Target Group using Quick Query	Compose Query	Run Query	Finalize Query	Define Execution Type	Create Target Group
⊜ Camp	You can now attempt to creat	te the target group, by c	licking the button	below.		

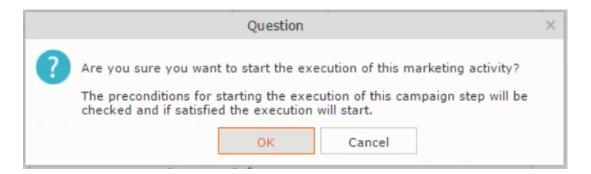
If any of the intermediate process steps are incomplete, you get a warning message, including if the target group is already created. A sample screenshot is provided below:

	#a	Create Target Group usi	ng Quick Query		
Ra Create Target Group	Compose Query	Run Query	Finalize Query	Define Execution Type	Create Target Group
using Quick Query					
Target group cannot be created because	of the following reasons:			C	eate Target Group
1. Target group has already been	created.				
Create Target Group					

6. Click Create Target Group to complete creating the target group.

Selecting or modifying the target group

- 1. Open the required campaign in the campaign designer.
- 2. On the marketing activity container:
 - Click OK to expand the container.



• Click the target group icon to open the Target Group

	📢 Campaign: Questionnaire; Marketing Activi	ty: Survey	□, ×
🛪 Campaign: Questionnaire; Marketing	Activity: Survey		
🛃 Edit 🗸 Save 🖉 Cancel 🖩 Calculate 🖳 🕅			
Marketing Activity Survey			
Starts on \$3/29/2016	Ends on 03/31/2016	Target group size (Target)	
Resp. Rep ID Super User	Costs Planned		
Text			

• and Execution Definition window.

eting Activity:	Survey				
					+ ~
~	*Ends on	03/31/2016	~	Target group size	
9	Costs	\searrow		(Target)	
	Currency		+ ~		
		*Ends on Costs			

3. Click Select/Rework Target Group. The Select/Rework Target Group window displays.

	er						4	Search
			≜ _q s	elect/Rework Tar	get Group			a. ×
	elect/Rework Target roup			Select/Rework	Target Group	xecution Definition		^
Camp	- 🗸 Target Groups							and All 🛞 🕞
	Search Marketing Activities						÷ ^	
	Marketing Activity Add a valu	e		+ ~	Level			
	Variant Add a valu	e		+ ~	Resp. Rep ID		2	
	+ Add more			~	With me			
	Max. 5 👻 records per page						Start Search	
	Search Results « < 1 - 5 of 5-	• > >>					^	
	Marketing Activity	R.	Marketing	Status		Campaign	Campaign	
	Confirmation		Internal_x	Scheduled		Spring Promotion Event 2016	Event	
	Event			Scheduled		Source Campaign	Event	
	Event			Scheduled		Spring Promotion Event 2016	Event	
	Follow-up			Scheduled		Spring Promotion Event 2016	Event	
	Invitation			Scheduled		Spring Promotion Event 2016	Event << < 1 - 5 of 5+ > >>	
	Taraat Crown Entition							_

4. You can search for marketing activities and select the desired marketing activity. The target group entities for the selected marketing activity are listed below.

			₽ _q s	elect/Rework Target Group			
ect/Rewo	ork Target			Select/Rework Target Group	Execution D	efinition	
✓ Target (Groups						-
Search	Marketing Activities	3					÷ •
Search	Results « < 1 - 5 of	11 > >>					^
1	Marketing Activity		Marketing	Status	Campaign		Campaign
	Confirmation		Internal_x	Scheduled	Spring Pro	motion Event 2016	Event
	Event			Scheduled	Source Car	mpaign	Event
	Event			Scheduled	Spring Pro	motion Event 2016	Event
	Follow-up			Scheduled	Spring Pro	motion Event 2016	Event
	Invitation			Scheduled	Spring Pro	motion Event 2016	Event ≪ < 1 - 5 of 11 ≯ ≫
✓ Target (Group Entities						
		Person		Rep ID	Response	Generated	Inact Executed
1	Company	Ferson					

5. Double click on the marketing activity to add the target group from the selected marketing activity to the target group of the current marketing activity. The Execution Definition window displays.

	a Select/Rework Target Group
م Select/Rework Target Group	Select/Rework Target Group Execution Definition
Proceed *Edit target group until 05/05/2016 *Execution Type One-off, execute selection/query	

- 6. Specify the following information:
 - Edit target group until Specify the date until the target group can be updated.
 - Execution Type Select the execution type from the drop-down list.
- 7. Click Proceed. The campaign designer window opens.

M Survey	03/29/2016 - 03/31/2016	≡ ^
1. Channels	🐛 (4) 🔛 (0) @(0) 💻 (0) 🖶 (0)	. (0)
2. Target Group	الله (Until 04/05/2016) الله (Until 04/05/2016)	
3. Execution		
4. Responses	*	

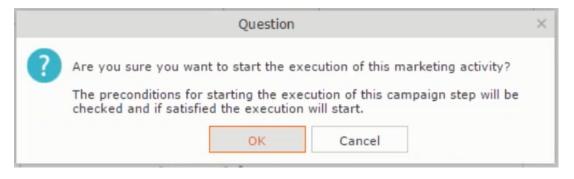
8. Click 🔳 to view the newly added participant to the target group.

		🖧 Edit Target Group			
Edit Target Group	Campaign Quest Starts on 03/25, Ends on 04/06,	/2016	Type Questionnaire Status In Progress	Resp. Rep ID Edit target g 04/05/201	6
Company Rep ID + A Max. 15 • records per page	dd more	01	st Name Inactive ? With me	Start Search	
Search Results	Set Inactive 🗙 Delete 💄 Add Person	L Add Person in Company	💄 Add Contact Person	🗒 Add Company 🗸 🔣 🖌 🛱	Modify List Fields
Company	Person	Rep ID	Response	Generated Inac	ti Executed
Zummatechi	Orlando Rizzi			\checkmark	
Zummatechi	Carlene Mcnary			\checkmark	
Zummatechi	John Smith			\checkmark	
₽	Tonia Mertens			V	

Defining Execution Type

To define an execution type, perform the following:

- 1. Open the required campaign in the campaign designer.
- 2. On the marketing activity container:
 - Click OK to expand the container.



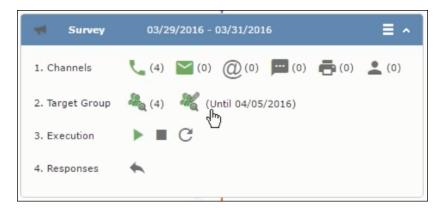
• Click the target group icon to open the Target Group

	📢 Campaign: Questionnaire; Marketing Activit	y: Survey	
← Campaign: Questionnaire; Marketi			
Starts on \$3/29/2016	Ends on 03/31/2016	Target group size (Target)	
Resp. Rep ID <u>Super User</u> Text	Costs Planned		
1645			

• and Execution Definition window.

	Questionnaire; Marketing) Cancel 📓 Calculate 📙 🧊		irvey				
*Marketing Activity	Survey						+ ~
*Starts on	03/29/2016	~	*Ends on	03/31/2016			
Resp. Rep ID	Super User	91	Costs		R	(Target)	
			Currency		+ 、	/	
Text							

- 3. Specify the following information:
 - Edit target group until Specify the date until the target group can be updated.
 - Execution Type Select the execution type from the drop-down list.
- 4. Click Proceed. The campaign designer window opens.



Executing a Marketing Activity

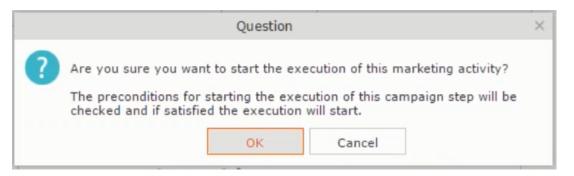
To execute a marketing activity, the following conditions should be met:

- All the selected channels and their formats should be defined. The selected channel icons would be green in color.
- The target groups should be defined. The Target group icons would be green in color.

- The current date should be within the scope of the start and end dates of the campaign.
- The "Edit target group until date" has to be defined. This date is visible besides the edit target group icon (3).

To execute a marketing activity, perform the following steps:

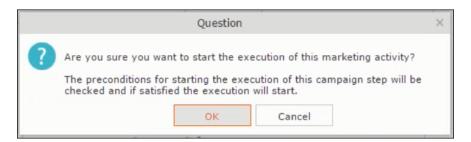
- 1. Open the required campaign in the campaign designer.
- 2. On the marketing activity container:
 - Click OK to expand the container.



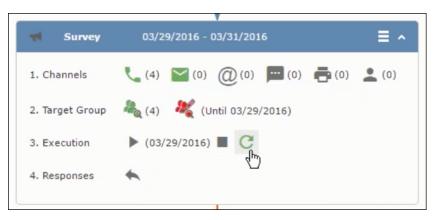
• The following screenshot shows the Survey marketing activity container.

Company			
Last Name		First Name	
+ Add mor	e	✓ With me	
ax. 15 👻 records per page			Start Search
earch Results			
м Туре	Company	Person	Response 1 (Marketing Act.)
🗏 🚽 🗸 Telephone	<u>Zummatechi</u>	<u>Orlando Rizzi</u>	
Telephone	Zummatechi	Carlene Mcnary	
Telephone	Zummatechi	John Smith	
Telephone	Lamplanet	Tonia Mertens	

3. Click the ► button on the **Execution** row. A query window pops up asking you to confirm the operation.



4. Click **OK**. A server notification informs you that the marketing activity has started and informs you when it is completed.



The Execute button is now greyed and the date on which the execution starts automatically is displayed in brackets besides it.

Note: The edit target group icon is now in red ($\overset{\&}{}$). The abort button is greyed out once the execution starts. And reset button is now activated. The Responses button remains grey until the all the participants have responded.

Editing/Viewing the Responses for a Marketing Activity

To edit or view the responses for a marketing activity, perform the following steps:

1. Click icon in the responses row. The Edit/View Response (Activities) window opens.

		H Edit/View	Responses (A	ctivities)			
Edit/Vi	ew Responses (Activities)				1	¢ ^	
	Company Last Name			First Name			
	+ Add more		~	With me			
Max. 15	✓ records per page				Start Sea	arch	
Search	n Results					10	
\$ ⁶ ~	Туре	Company	P	erson	Response 1 (Marketing Act.)		
	✓ Telephone	<u>Zummatechi</u>	<u>0</u>	Irlando Rizzi			
	Telephone	Zummatechi	<u>c</u>	arlene Mcnary			
	Telephone	Zummatechi	<u>]</u>	ohn Smith			
	Telephone	Lamplanet	I	onia Mertens			

You can search for specific participants and view/edit their responses.

2. Select a row and click on Response 1 (Marketing Act.) column to activate and record the response.

		dit/V	iew Responses (Ac	tivities)	
Edit/Vi	ew Responses (Activit	ties)			۵ ۸
	Company				
	Last Name			First Name	
	+ Add more .		~	With me	
Max. 15	 records per page 				Start Search
Search	Results				XI ~ 🔅
1	Туре	Company	Pe	erson	Response 1 (Marketing Act.)
v 0	Telephone	Zummatechi		rlando Rizzi	Add 5 more + v
	Telephone	Zummatechi	Ci	arlene Mcnary	
	Telephone	Zummatechi	<u>]0</u>	hn Smith	
	Telephone	Lamplanet	Is	onia Mertens	

3. Click the drop-down list to select the response type. Click on the + button to add more response types to the response catalogue entries.

		r Edit/View	Responses (Activities)	E. C.
Edit/Vi	iew Responses (Activitie	es)		¢ •
	Company			
	Last Name		First Name	
	+ Add more		✓ With me	
lax. 15	✓ records per page			Start Search
Search	h Results			XII ~ 4
1	Туре	Company	Person	Response 1 (Marketing Act.)
	Telephone	Zummatechi	Orlando Rizzi	Finished Survey
	Telephone	Zummatechi	Carlene Mcnary	No Response
	Telephone	<u>Zummatechi</u>	<u>John Smith</u>	Finished Survey + ^
	Telephone	Lamplanet	Tonia Mertens	
				Thished Survey

Edit the responses for all the participants.

4. Close the window to come back to the campaign manager window. The response icon is be green in color. This shows that response for all the participants is recorded.

	×
Survey	03/29/2016 - 03/31/2016
1. Channels	🐛 (4) 🔛 (0) @(0) 📼 (0) 🚍 (0) 💄 (0)
2. Target Group	المراجع (Until 03/29/2016)
3. Execution	▶ (03/29/2016) ■ C
4. Responses	*
R Finished Survey	
	(h)
	Survey Reminder 03/29/2016 - 03/31/2016

Notice the "(2)" in the response containers for the Survey marketing activity: **Finished Survey** and **No Response** show. This indicates that two participants completed the survey and two members did not respond.

5. Click the button to expand the **Survey Reminder** follow-up marketing activity container for those participants who did not respond to the Survey.

	Question	×
?	Are you sure you want to start the execution of this marketing activity? The preconditions for starting the execution of this campaign step will be checked and if satisfied the execution will start.	
	OK Cancel	

4. Responses 🔶	
Finished Survey (2	2) Response (2) =
	Survey Reminder 03/29/2016 - 03/31/2016
	1. Channels 📞 (0) 🔛 (0) 🔘 (0) 💼 (0) 🚔 (0) 👤 (0)
	2. Target Group 🦓 (2) 💐
	3. Execution C 4. Responses

You can see that two participants who did not respond are already added to the target group of the follow-up marketing activity.

6. Click to open the Edit Target Group window for the Survey Reminder follow-up marketing activity.

		🖧 Edit Target Group		□, ×
Edit Target Group	Campaign Question Starts on 03/25/20 Ends on 04/06/20	016 Туре		Rep ID rget g
Company Rep ID + A Max. 15 Y records per page	dd more	Last Name	?	Start Search
Search Results Company Lamplanet Zummatechi	Set Inactive X Delete & Add Person & Person Tonia Mertens Carlene Monary	Add Person in Company & Add Rep ID Super User Super User	Contact Person III Add Compan Response Generated No Response No Response	

You can see that the two members with "No Response" in the **Response** column are listed.

Resetting the Marketing Activity Execution

Restarting a marketing activity is possible if the marketing activity execution is completed. It results in the following:

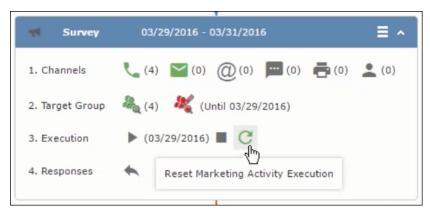
- All generated target group entities marked as "Generated" are deleted.
- The target group entities marked as "non Generated" are retained.
- The target group entities are regenerated based on the selection/query attached to this marketing activity.
- The target group entities that are marked as executed remains in the same state for the current target group.

To reset a marketing activity execution, perform the following:

- 1. Open the required campaign in the campaign designer.
- 2. On the marketing activity container, click to expand the container.

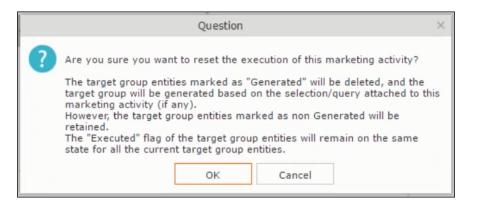
	Question	×
?	Are you sure you want to start the execution of this marketing activity? The preconditions for starting the execution of this campaign step will be checked and if satisfied the execution will start.	

The following screenshot shows the **Survey** marketing activity container.



Notice that the execution button and the abort button are in grey. The reset button is in green and is active.

3. Click C to reset the marketing activity execution. A confirmation window displays.



4. Click **OK**. The target group is reset and the target group is regenerated. The edit target group until date is reset.

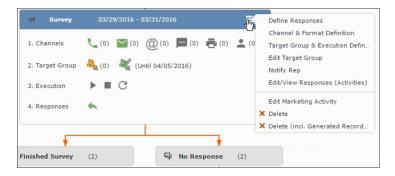
r Survey	03/29/2016 - 03/31/2016
1. Channels	(0) (0) (0) (0) (0) (0) (0) (0) (0)
2. Target Group	ዲ (0) 🛛 💐 (Until 04/05/2016)
3. Execution	▶ ■ C
4. Responses	*

Notice that the Target group button is yellow and once the target group generation is completed, the execution button is active and ready for execution. The colors of the target group icon and execute button are in green.

Notifying Reps about a marketing activity

To notify reps, perform the following:

1. From the context menu of a marketing activity container, select Notify Rep.



2. The Notify about record opens.

Notify about recor	d	□ ×
You can send this record to any other rep and/or external recipie	nt. Please specify what you want to	send:
Recipients:		
Additional internal recipients:		9
Additional external recipients:		<u> </u>
Subject:		
Survey (In Progress) 03/29/2016		
Body:		
☑ Insert Aurea CRM web link		
Request a delivery receipt		
Request a read receipt		
	Send	Cancel

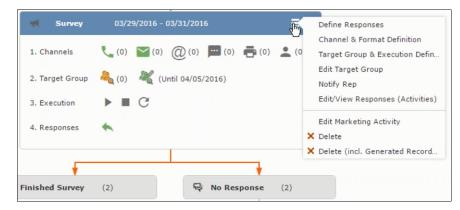
Enter the following information:

- **Recipients** Add the internal and external recipients (reps) who receive the notification.
- **Subject** Edit the subject of the notification email in this text field. You can also use the automatically generated subject.
- **Body** Enter the notification content in the Body field.
- Insert Aurea CRM web link Select this checkbox if you want to add the company URL in the notification.
- Request a delivery receipt Select this checkbox if you want a receipt of delivery.
- **Request a read receipt** Select this checkbox if you want to know if the notification was read by the recipient.
- 3. Click **Send** to send the notification to the selected reps.

Editing a Marketing Activity

To edit a marketing activity, perform the following:

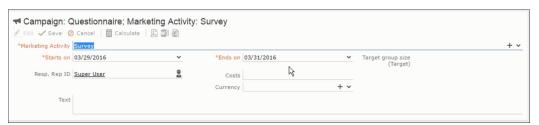
- 1. Open the required campaign in the campaign designer.
- 2. From the context menu of a marketing activity container, select Edit Marketing Activity.



3. The marketing activity window opens.

	📢 Campaign: Questionnaire; Marketing Activit	ty: Survey	□, ×
◀ Campaign: Questionnaire; Market ي Edit ✓ Save ⊘ Cancel			
Marketing Activity Survey			
Starts on 23/29/2016	Ends on 03/31/2016	Target group size (Target)	
Resp. Rep ID Super User	Costs Planned		
Text			

4. Click Edit to start editing the marketing activity.



5. Make the required changes and click Save.

Email Campaign Management

Email Campaign Management Using Aurea Campaign Manager (formerly called Lyris HQ)

As part of a campaign, the marketing activities can be carried out using multiple channels, like letters, fax, telephone, and email. Generally the email channel is the most preferred channel for marketing activities. While Aurea CRM provides its own email channel, it does not provide all the capabilities of a dedicated Email marketing solution. In order to provide a sophisticated email marketing channel Aurea CRM is integrated with Aurea Lyris HQ, a full-fledged Email marketing solution. Aurea CRM Enterprise edition users can use Lyris HQ to handle their email marketing activities and take full advantage of the sophisticated email marketing capabilities of Lyris HQ.

Note: Aurea CRM Enterprise license enables you to access Lyris HQ features. In order to use Lyris HQ features you require a separate license for Lyris HQ. Please contact email:support@aurea.com for more information on licensing Lyris HQ. You have to enable Lyris HQ in Aurea CRM in order to use Lyris HQ features from Aurea CRM.

Aurea Campaign Manager (CAM) notifies Aurea CRM of the actions it performs by using the event flow mechanism to send event notifications. Events are generated by the Aurea Campaign Manager, when it performs some action on Contacts, Mailing lists, Segments, and Messages. Events are also generated by user actions, like opening an email message or clicking a response link provided within the email message. The event notifications generated by the Campaign Manager is placed in event queues in the CRM Sync Middleware and received by the CRM.Server listening for event notifications.

Cross product integration between Aurea CRM and Aurea Lyris HQ allows you to perform the following tasks:

- Transfer a marketing activity to Lyris HQ.
- Transfer a CRM Target group to Lyris HQ.
- Receive Notifications and updates from Lyris HQ.

The following sections provide more details:

Transferring a Marketing Activity to Lyris HQ

Learn to transfer market activity to lyris HQ.

As part of a campaign you create one or more marketing activities. These activities could be conducted via multiple channels with email as one of the marketing channels. You can then transfer the marketing activity to Lyris and let Lyris HQ handle the marketing activity through the email channel.

This section describes how to transfer a marketing activity to Lyris, however it does not explain the full steps involved in creating a new campaign with marketing activities. For more information on working with marketing activity using the Campaign Designer, see Working with Marketing Activities on page 573.

You can transfer a marketing activity to Lyris HQ from the campaign designer or from the standard editor for marketing activities.

To illustrate the process of Lyris HQ as the email marketing channel, we can create a **NewProductLaunchEvent** campaign and invite our loyal and potential customers to the event, as part of the marketing activity. The invitations are extended using only the email channel.

Transferring from the Campaign Designer

To transfer a marketing activity to Lyris HQ from the campaign designer, perform the following:

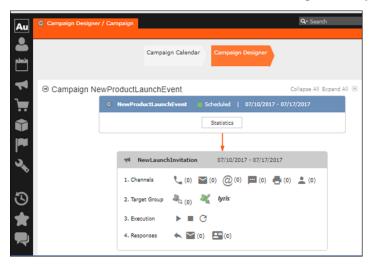
1. Open an existing campaign or create a new campaign. For more information, see Viewing a campaign on page 564 or Creating a new campaign from scratch on page 565. The following screenshot shows the example **NewProductLaunchEvent** campaign.

Campaign Calendar Ca	mpaign Designer	
unchEvent		Collapse All Expand All 🛞 🕞 🏚
NewProductLaunchEvent	Scheduled	03/24/2017 - 03/31/2017

 From the campaign container context menu select New Marketing Activity. The New Marketing Activity window displays.

Au	Campaign Designer / Campaign	Q- Search
₽	Campaign Calendar Campaign Designer	
▼	Campaign NewProductLaunchEvent C NewProductLaunchEvent Scheduled 07/10/2017 - 07/17/2017 New: Marketing Activity	Collapse All Expand All
\$ ■ >~	New Marketing Activity	Ţ
Ð	Activity Activity Starts on [07/10/2017 Fends on [07/17/2017 Target group size (Target) Resp. Rep ID Alax Currency Text	

- 3. Enter the required details. In this example we create a NewLaunchInvitation as the Marketing Activity.
- 4. Click Save to create the new marketing activity container in the campaign designer.



5. Click (email channel). The Channel & Format Definition page displays.

Au	Campaign Designer /	Campaign			Q- Search	
				_		
ونطو		c	hannel & Format Defini	tion		×
↓	Channel & Format Definition	Define Channel(s)	Define Format	Default Values (Contact	:) Default Values (Mailing)	^
•	✓ Format Definition	1				
Û	Format Name	Interr	nal_x000000640000007 vate			
	 Preferred Channel 					
· ·	Define by which channe	el(s) the customer shall be app	proached. Subsequently o	hoose how you want to docur	ment the contact.	- 18
3	Fixed Phone Letter E-mail SMS Fax In Person	Pho Let E-r SM Fao	ter nail S	Generate Activity Mailing		
${\mathfrak S}$						
+				Load Format Save	Channel(s) Proceed	

- a. Select the E-mail channel radio button under the Fixed column.
- **b.** Select the Activity and Mailing options under the Generate column. These are optional.

Note: If you wish to use multiple channels for the marketing activity, you can select the E-mail checkbox along with other required channels under the Variable (Priority) column.

- 6. Click Save Channel(s).
- Click Proceed, to go to the format definition phase. The Define Format page displays.

	/ Campaign					Q+ Search	
			Channel & Format (Definition			
Channel & Format Definition	Define C	hannel(s)	Define Format	Default V	alues (Contact)	Default Val	ues (Mailin
✓ Format Definit	on						
Format Name			estionnaire-Survey Private				
Lock							
*							
¥ E-mail							
*							
E-mail	In order the trar	nsfer to Lyris to	to be possible, all the	required fields have	to be completed)		
E-mail Iyris Create In Lyris		nsfer to Lyris to	to be possible, all the	required fields have	to be completed)		
E-mail	ist	nsfer to Lyris to	to be possible, all the r	required fields have	to be completed)		+ -
E-mail Iyris Create In Lyris Lyris Mailing	ist	nsfer to Lyris ti	to be possible, all the r	required fields have	to be completed)		+ -
✓ E-mail Lyris ▲ Create In Lyris Lyris Mailing E-mail: Sen	ist las om	nsfer to Lyris ti	to be possible, all the r	equired fields have	to be completed)		+ -

You can see that Lyris Email channel definition page is available. If Lyris is not enabled then the standard email channel definition page would be visible. Contact your CRM administrator to enable the Lyris email marketing channel.

8. Populate the fields as described below. These fields are mandatory in order to transfer the marketing activity to Lyris.

Note: The Create in Lyris button is activated once all the fields are populated and the channel format is saved.

- Lyris Mailing List:Click to get a drop-down list of mailing lists in Lyris. Select the required mailing list. You can also create a new mailing list. To create a new mailing list, perform the following:
 - 1. Click +. The Create new mailing list in Lyris dialog displays.

Create new mailing list	t in Lyris \times
Name: CRM-NewProductLaunchEv	vent - NewLaunc
ОК	Cancel

A default name (CRM-NewProductLaunchEvent - NewLaunchInvitation) is provided which is a concatenation of three names: default mailing list prefix configured in the CRM Designer (CRM-) + the campaign name (NewProductLaunchEvent) + the marketing activity name (NewLaunchInvitation). In case the marketing activity does not belong to a campaign then the prefix and the activity name is used. For this example, CRM-NewLaunchInvitation. You can rename it to a desired name. In this example, we change the name to CRM- NewLaunchInvitation.

2. Click OK. A new blank mailing list is created in Lyris.

If for some reason the mailing list could not be created in Lyris then the dialog displays the appropriate error message. For example, the following screenshot shows the error message that a mailing with the same name already exists.

Create	new mailing lis	t in Lyris \times
Name:		
CRM-Nev	LaunchInvitation	n
	r: Another mailir ady exists	ng list with this
	ОК	Cancel

- E-mail: Send as: Select the desired format of the email you wish to send: HTML or Text
- E-mail From: Enter the email address of the marketing email sender.
- From Name: Enter the name of the sender.
- Subject: Enter the subject for the email.

Note: The above fields are used as properties of the email messages that are created in Lyris.

 Click Save Channel Format(s). After the channel format is saved, the Create in Lyris button gets activated.

10.Click Create in Lyris.

A dummy message is created in Lyris for the marketing activity. Depending on your selection for the E-mail Send as field the dummy message is a text or HTML message. A tick appears besides the *lyris* icon on successful creation of the message. And a Detach message button displays. The ids for the mailing list and message created in Lyris are displayed along with the links to the instances in Lyris. See the screenshot below.

Au	00	ampaign Designer / Camp	aign C	Q• Search
•			Channel & Format Definition	σ×
		Channel & Format Definition	Define Channel(s) Define Format Default Values (Contact)	Default Valu
1				
`		 Format Definition 		_
		Format Name	Questionnaire-Survey	
		Lock	Private	
		*		_
		E-mail		
1.5		lyris V		
э.		P Detter	h message	
~		Please note that modif	ving the fields below will result to the update of the corresponding fields in the linked	Lyris message.
			CRM-NewLaunchInvitation	
		Lyris Message Id		
		E-mail: Send as		~
			dirk@ecogreen.com	
		Lyris From Name		
-		Subject	New Product Launch - Invitation	
3				
~				
*			Load Format Save Channel Format(s)	Proceed
<u> </u>				

Click Detach Message to delete the message created in Lyris. Once the message is detached, all the attributes of the message are cleared, including the links in the Lyris Message ID and Lyris Mailing List fields. The corresponding message created in Lyris is also deleted. If the message is already sent then any responses received for the message are ignored by Lyris and Aurea CRM does not get any event corresponding to the message.

11.Click Save Channel Format(s).

12.Click Proceed.

Transferring from the Standard Editor

If you prefer to use the standard editor for creating marketing activities instead of the Campaign Designer, you can still transfer a marketing activity to Lyris from the standard editor.

To transfer a marketing activity from the standard editor to Lyris, perform the following:

- 1. Select Marketing > Marketing Activities from the CRM menu. The Search Marketing activities page displays.
- 2. Enter the search filters and click Start Search. The search results list displays.
- 3. Open the context menu of the required marketing activity from the result list and select Tab View or Tree View. The Marketing Activity window displays.

Marketing Activity Survey,	Variation event			Q. Search		
				<	×	- > -
Marketing Activity Su	rvey, Variation event					
≣ Menu 🖉 Edit 🗸 Save 🤅	Cancel 🛛 🔠 Calculate 🖧 Create tar	get group 👀 Start Marketin	g Activity 🛛 🗋 🗐 🗃			
Marketing Activity S	urvey					
Starts on 0	3/21/2017		Ends on 04/04/2017			
Variant e	vent		Resp. Rep ID Super User			
Level			Sales Cycle			
Marketing Activity Detail	s Extras					
Status I	Progress		Туре			
Execution status		Cam	paign starts on			
Campaign status S	cheduled	Carr	ipaign ends on			
Event Location						
Text						
						-
Parent Data Relate	d Data					- ≡
Graph X Target Group	X Responses X Reps X Ac	tivities $ imes$ Mailings $ imes$	Work Orders 🖂 🛛 Execution	N X Statistics	Document	> ~
🔲 Add Company 🚨 Add	Person in Company 🚨 Add Person 🚨	Add Contact Person 🔺 Add	l from Company Favorites 🔺	Add Person in Com	any from Favorit	es
			📌 Add from P	erson Favorites 🛛 🛏	Display All Recor	ds
Company	Person	Rep ID	Marketing Activity	Response	Inac Ge	n
Realty Zone	Mr. Peter Austerlitz	Super User	Survey			

Note: Double clicking a marketing activity from the result list opens the marketing activity in the campaign designer.

- 4. Select Create Marketing Activity Format from the context menu. The Marketing Activity Format window displays.
- 5. Select the preferred channel. Click the E-mail radio button under Fixed, then click the Email tab.

Marketing Activity Forma	t for Marketing Act	Q• Search
Marketing Activity F	Format for Marketing Activity S	Survey, Variation event
Previous 🛛 🗸 Save		
♥ Preferred Channel		
Fixed Phone Letter E-mail SMS Fax In Person Letter Letter	Variable Phone Letter E-mail SMS Fax In Person	Cenerate ≪ Activity Mailing Work Order
lyris A Create In Lyris (In order	the transfer to Lyris to be possible, all the	required fields have to be completed)
Lyris Mailing List		~
E-mail: Send as		~
E-mail from		
From Name		
Subject		

You should see the Lyris Email channel definition page. If Lyris is not enabled then the standard email channel definition page would be visible. Contact your CRM administrator to enable the Lyris email marketing channel.

6. The remaining steps are similar to those listed for transferring a marketing activity to Lyris from the campaign designer, see steps 8 to 10 in the topic Transferring from the Campaign Designer on page 632.

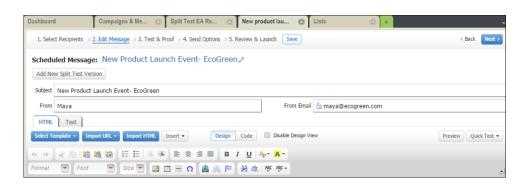
Making changes to the marketing activity transferred to Lyris

When you modify and save the message details of a marketing activity that is already transferred to Lyris, the changes are automatically transferred to the corresponding Lyris instance of the marketing activity's message.

For example, in the screenshots below, the E-mail from, Lyris From Name and Subject field values are changed and the channel format is saved. The screenshots of Lyris show the changes reflected in the corresponding fields of the message.

Au	Campai	ign Designer / Campaign		Q. Search	
•			Channel & Format Definition		×
Ë		Channel & Format Definition	Define Channel(s) Define Format Default Values (Contact) Default Values (Mailing)		î
ዩ 🗦 🖝 🖿 🖍	⊜ Can	The record has been saved. Format Definition Format Name Lock E-mail Uyris Detach mess	©versionnane-Survey ☐ Private 1997 . *Faids below will result to the update of the corresponding field in the linked Lyris message.		
<u>ب</u> ۲		Lyris Message Id E-mail: Send as E-mail from Lyris From Name	HTML maya@ecogreen.com	Proceed	

The values are changed from **dirk@ecogreen.com**, Dirk, and "New Product Launch Invitation" to **maya@ecogreen.com**, Maya, and "New Product Launch Event – Ecogreen" respectively. The corresponding changes are reflected in the Lyris message.



Note: Automatic transfer of changes to Lyris can take some time.

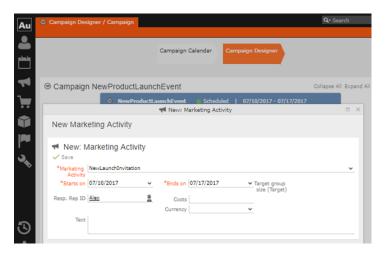
Transferring from the Campaign Designer

To transfer a marketing activity to Lyris HQ from the campaign designer, perform the following:

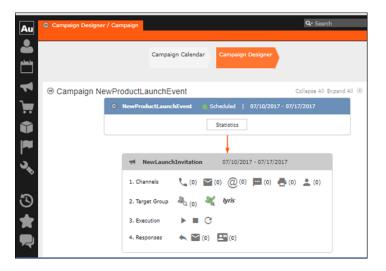
1. Open an existing campaign or create a new campaign. For more information, see Viewing a campaign on page 564 or Creating a new campaign from scratch on page 565. The following screenshot shows the example **NewProductLaunchEvent** campaign.

	Campaign Calendar	Campaign Designer	
Campaign NewProductLa	unchEvent		Collapse All Expand All 🛞 💿 们
	NewProductLaunchE	went 🌐 Scheduled	03/24/2017 - 03/31/2017

2. From the campaign container context menu select New Marketing Activity. The New Marketing Activity window displays.



- 3. Enter the required details. In this example we create a NewLaunchInvitation as the Marketing Activity.
- 4. Click Save to create the new marketing activity container in the campaign designer.



5. Click (email channel). The Channel & Format Definition page displays.

Au	Campaign Designer /	Campaign			Q- Search	
ĕ						×
وتعلم		Ch	hannel & Format Defir	hition		
	Channel & Format Definition	Define Channel(s)	Define Format	Default Values (Contact)	Default Values (Mailing)	^
•••	 Format Definition 	n				
Û	Format Name	Intern	al_x000000640000000 vate	7		
	 Preferred Chann 					
				choose how you want to docume	ent the contact.	
~	Fixed Phone	Variab	le (Priority)	Generate Activity		
	O Letter	Lett		 Mailing 		
	 E-mail SMS 	E-m SMS				
	O Fax	E Fax				
	In Person	In F	Person			
3						
*				Load Format Save C	Channel(s) Proceed	

- a. Select the E-mail channel radio button under the Fixed column.
- **b.** Select the Activity and Mailing options under the Generate column. These are optional.

Note: If you wish to use multiple channels for the marketing activity, you can select the E-mail checkbox along with other required channels under the Variable (Priority) column.

- 6. Click Save Channel(s).
- **7.** Click Proceed, to go to the format definition phase. The Define Format page displays.

		Channel & Format Defin	ition		
Channel & Format Definition	Define Channel(s)	Define Format	Default Values (Co	ntact) Default V	'alues (Mailing
✓ Format Definition					
Format Name	Qu	uestionnaire-Survey Private			
*					
+ E-mail					
E-mail Iyris Create In Lyris (In o	rder the transfer to Lyris	to be possible, all the requi	red fields have to be co	mpleted)	+ ~
E-mail Lyris Create In Lyris (In o Lyris Mailing List E-mail: Send as	rder the transfer to Lyris	to be possible, all the requi	red fields have to be co	mpleted)	+ •
✓ E-mail Lyris ▲ Create In Lyris (In o Lyris Mailing List E-mail: Send as E-mail from	rder the transfer to Lyris	to be possible, all the requi	red fields have to be co	mpleted)	+ \
E-mail Lyris Create In Lyris (In o Lyris Mailing List E-mail: Send as	rder the transfer to Lyris	to be possible, all the requi	red fields have to be co	mpleted)	+ 、

You can see that Lyris Email channel definition page is available. If Lyris is not enabled then the standard email channel definition page would be visible. Contact your CRM administrator to enable the Lyris email marketing channel.

8. Populate the fields as described below. These fields are mandatory in order to transfer the marketing activity to Lyris.

Note: The Create in Lyris button is activated once all the fields are populated and the channel format is saved.

- Lyris Mailing List:Click to get a drop-down list of mailing lists in Lyris. Select the required mailing list. You can also create a new mailing list. To create a new mailing list, perform the following:
 - 1. Click +. The Create new mailing list in Lyris dialog displays.

Create new mailing list	in Lyris \times
Name:	
CRM-NewProductLaunchEv	vent - NewLaunc
OK	Cancel
OK	Cancer

A default name (CRM-NewProductLaunchEvent - NewLaunchInvitation) is provided which is a concatenation of three names: default mailing list prefix configured in the CRM Designer (CRM-) + the campaign name (NewProductLaunchEvent) + the marketing activity name (NewLaunchInvitation).

In case the marketing activity does not belong to a campaign then the prefix and the activity name is used. For this example, CRM-NewLaunchInvitation. You can rename it to a desired name. In this example, we change the name to CRM- NewLaunchInvitation.

2. Click OK. A new blank mailing list is created in Lyris.

If for some reason the mailing list could not be created in Lyris then the dialog displays the appropriate error message. For example, the following screenshot shows the error message that a mailing with the same name already exists.

Create new mailing list in Lyris X							
Name:							
CRM-Nev	CRM-NewLaunchInvitation						
Lyris Error: Another mailing list with this name already exists							
			1				
	OK	Cancel					

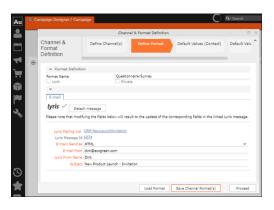
- E-mail: Send as: Select the desired format of the email you wish to send: HTML or Text
- E-mail From: Enter the email address of the marketing email sender.
- From Name: Enter the name of the sender.
- Subject: Enter the subject for the email.

Note: The above fields are used as properties of the email messages that arecreated in Lyris.

9. Click Save Channel Format(s). After the channel format is saved, the Create in Lyris button gets activated.

10.Click Create in Lyris.

A dummy message is created in Lyris for the marketing activity. Depending on your selection for the E-mail Send as field the dummy message is a text or HTML message. A tick appears besides the *lyris* icon on successful creation of the message. And a Detach message button displays. The ids for the mailing list and message created in Lyris are displayed along with the links to the instances in Lyris. See the screenshot below.



Click Detach Message to delete the message created in Lyris. Once the message is detached, all the attributes of the message are cleared, including the links in the Lyris Message ID and Lyris Mailing List fields. The corresponding message created in Lyris is also deleted. If the message is already sent then any responses received for the message are ignored by Lyris and Aurea CRM does not get any event corresponding to the message.

11.Click Save Channel Format(s).

12.Click Proceed.

Transferring from the Standard Editor

If you prefer to use the standard editor for creating marketing activities instead of the Campaign Designer, you can still transfer a marketing activity to Lyris from the standard editor.

To transfer a marketing activity from the standard editor to Lyris, perform the following:

- 1. Select Marketing > Marketing Activities from the CRM menu. The Search Marketing activities page displays.
- 2. Enter the search filters and click Start Search. The search results list displays.
- 3. Open the context menu of the required marketing activity from the result list and select Tab View or Tree View. The Marketing Activity window displays.

	farketing	Activity Survey, Variati	on event			Q• Search		
teru								
Marketing Activity Survey Ends on 04/04/2017 Starts on 00/21/2017 Variant event Level Sales Cycle tarketling Activity Details Excision Progress Type Excercition status Campaign status so Campaign status Shedold Campaign ends on Event Sales Cycle Text Text Campaign status Shedold Campaign ends on Event Loation Text Campair Shedold Castle Document 2 Add Company Responses × Responses × Responses × Add Contact Person * Add from Company Front Shedols * Castles Company * Add Person Resons * Castles in the Company Front Shedols * Castles in Company Front Shedols * Castles in Campany * Add Contact Person * Add from Company Front Shedols * Shedold France Natures * Castles in Campany * Add Person Resons * Castles * Tailings * Work Orders × Execution × Statistics * Document * Shedold from Person Resons * Castles in Campany * Add Person Resons * Castles in Campany * Add Person Resons * Castles in Campany * End Person Resons * Castles in Castles * Castl	Marketir	ng Activity Survey,	Variation event					
Starts on 02/12/0377 Ends on 04/04/037 Variest event Preps. Pero D Super Utars Level Starts of 02/04/057 Press Exercision Activity Details Exercision Status its Naropass Tyre Exercision Status its Scheduled Campairy Status Scheduled Campairy Status Scheduled Text Text Campairy Status Scheduled Campairy Status Scheduled Campairy Status Scheduled Campairy Status Scheduled Add Company Add Person In Company Status Scheduler to Company From Torontes Add Contact Person Add Ternon Add Terno Person Franches to Displary Response Add Company Add Center Activities to Delate The Status to Company From Torontes Add Company Add Center Person Mathine Person Franches to Displary Response Company Person Rop ID Matheting Activity Response Response Sci Oen	tenu 🥒	Edit 🗸 Save ⊘ Cano	el 📗 Calculate 🖧 Create targe	et group 🔉 Start Marketi	ing Activity 🗈 📶 🔞			
Valuet event Level Peers. Rep ID Super Usar Sales Cycle Extreming Activity Details Extra Extreming Activity Details Extra Extreming Activity Campaign status Scheduled Campaign status Scheduled Campaign ends on Event Location Text Type arrent Data Related Data Image: Campaign ends on Event Cocation Text Image: Campaign ends on Campaign ends on Event Cocation Text arrent Data Related Data Image: Campaign ends on Event Cocation in Company & Add Person & Add Contact Person & Add Frem Company Favorites & Execution X Statistics & Decument A # Add Frem Person Favorites : Dialpar All Revolts Company Add Company Add Person in Company & Add Person & Add Contact Person & Add Frem Company Favorites & Dialpar All Revolts # Add frem Person Favorites : Dialpar All Revolts Company	м	arketing Activity Survey						
Level Sales Cycle Sarketing Additivity Details Execution status Type Execution status Campaign starts on Campaign ends on Event Location Text anonent Data Related Data Graph ×: Target Group ×: Reps ×: Add Company & Add Person In Company * Add Contact Person * # Add Company & Add Person In Company * Add Contact Person * # Add Company & Add Person Revoltes *: >> Company Person Rep ID Marketing Addity		Starts on 03/21/20	017		Ends on 04/04/2017			
tarketing Activity Details Extra s Status to Progress Type Execution status Campaign ends on Campaign status Scheduled Campaign ends on Event Location Test arrent Data Related Data Graph × Target Group × Responses × Raps × Target Group × Responses × Add Company & Add Person in Company & Add Person & Add Contact Person Add Company Person Rep ID Marketing Activity		Variant event			Resp. Rep ID Super User			
Status In Progress Type Execution status Campaign status on Campaign status Scheduled Campaign ends on Event Location Text		Level			Sales Cycle			
Company stats on Company Person Rep ID Kateling Active Reports Company Person Rep ID Kateling Active Reports Company	larketing	Activity Details Ex	tras					
Campulys status Scheduled Campulys ends on Event Lotation Text arent Data Related Data Graph × Target Group × Responses × Reps × Activities × Mallings × Work Orders × Execution × Statistics × Document > ∰ Add Company & Add Person In Company & Add Person & Add Costsct Person & Add From Company Favorites & did Person In Company Four Favorites & Company Person Rep ID Narketing Activity Responses Loc. Gen		Status In Progre	55		Туре			
Event Location Text arrent Data Related Data Graph × Target Group × Responses × Reps × Activities × Mallings × Work Orders × Execution × Statistics × Decument → Add Company & Add Person In Company & Add Person & Add Contact Person & Add from Company Sworths & Add Person In Company form Family Add Company & Add Person In Company & Add Person & Add Contact Person & Add from Company Sworths & Decument A	8	Execution status		Car	mpaign starts on			
Text arent Data Related Data Graph × Target Group × Responses × Reps × Activities × Mailings × Work Orders × Execution × Statistics × Document > Add Company Add Person Add Contact Person Add from Company Favorites Diplay All Record Company Person Rep ID Marketing Activity Reponse Diplay All Record Company Person Rep ID Marketing Activity Reponse Diplay All Record Company Person Rep ID Marketing Activity Reponse Diplay All Record Person Rep ID Marketing Activity Reponse Diplay All Record Person Rep ID Marketing Activity Reponse Diplay All Record Person Rep ID Marketing Activity Reponse Diplay All Record Person Rep ID Marketing Activity Reponse Diplay All Record Person Rep ID Marketing Activity Reponse Diplay All Record Person Rep ID Marketing Activity Reponse Diplay All Record Person Rep ID Person Rep ID Person Reponse Diplay All Record Per	0	Campaign status Schedule	d	Ca	mpaign ends on			
arent Data Related Data Graph % Target Group % Responses × Reps % Activities × Mallings % Work Orders × Execution × Statistics % Decument J # Add Company & Add Person In Company & Add Person & Add Contact Person & Add from Company Shorithes we Display All Renor # Add Company & Responses we Depart All Person Renorms we Display All Renorms Data Company Company Person Rep ID Harketing Activity Response		Event Location						
Graph × Target Group × Responses × Resp Activities × Mallings × Work Orders × Execution × Statistics × Document > ∰ Add Company & Add Person in Company & Add Person & Add Contact Person & Add Feron Ompany Newtes & Add Feron In Company frem Yarothe & Add Feron Newtes > Document > Add Contact Person & Add Contact Person & Add Contact Person & Add Feron Newtes > Document > Document > Z Company Person Rep ID Marketing Addity Reponse Dace. Bace.		Text						
Graph × Target Group × Responses × Reps × Activities × Mailings × Work Orders × Execution × Statistics × Document > III Add Company & Add Person in Company & Add Person & Add Cottact Person & Add Form Company Favorites & Add Form Person Favorites >>> Graph Add Company & Add Cottact Person & Add Cottact Person & Add Form Person Favorites >>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>			-					
🚆 Add Company 🔔 Add Person in Company 🚊 Add Person 🛔 Add Contact Person 🌸 Add from Company Favorites 🌸 Add Person in Company from Favorites 🌸 Add Ionn Person Favorites 🛏 Diplay All Record 🖉 Company Person Person Rep ID Marketing Activity Response Inac Gen							_	
	Graph	Target Group ×	Responses × Reps × Activ	vities × Mailings ×	Work Orders × Execution	n × Statistics	Document	t >
	🔲 Add C	Company 🚨 Add Person	in Company 💄 Add Person 💄 A	idd Contact Person 🏾 🌟 Ac				
Realty Zone Mr. Peter Austerlitz Super User Survey	1	Company	Person	Rep ID	Marketing Activity	Response	Inac G	en
		Realty Zone	Mr. Peter Austerlitz	Super User	Survey			

Note: Double clicking a marketing activity from the result list opens the marketing activity in the campaign designer.

- 4. Select Create Marketing Activity Format from the context menu. The Marketing Activity Format window displays.
- 5. Select the preferred channel. Click the E-mail radio button under Fixed, then click the Email tab.

Marketing Activity Format for	Marketing Act	Q + Search	
Marketing Activity For	mat for Marketing Activity Su	rvey, Variation event	
🗲 Previous 🛛 🗸 Save			
 Preferred Channel 			
Fixed Phone Letter SHS Fax In Person Letter Ermail SMS Create in Lyris Create in Lyris	Variable Phone Hone Letter F	Generate Achity Haling Wark Order guired fields have to be completed)	
Lyris Mailing List E-mail: Send as E-mail from		پ ب	
From Name Subject			
		Save	

You should see the Lyris Email channel definition page. If Lyris is not enabled then the standard email channel definition page would be visible. Contact your CRM administrator to enable the Lyris email marketing channel.

6. The remaining steps are similar to those listed for transferring a marketing activity to Lyris from the campaign designer, see steps 8 to 10 in the topic Transferring from the Campaign Designer on page 632.

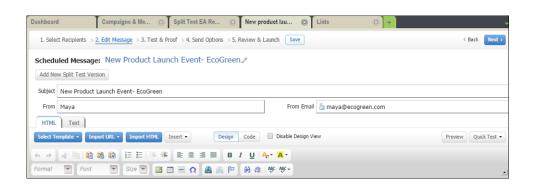
Making changes to the marketing activity transferred to Lyris

When you modify and save the message details of a marketing activity that is already transferred to Lyris, the changes are automatically transferred to the corresponding Lyris instance of the marketing activity's message.

For example, in the screenshots below, the E-mail from, Lyris From Name and Subject field values are changed and the channel format is saved. The screenshots of Lyris show the changes reflected in the corresponding fields of the message.

Au	Campa	ign Designer / Campaign		Q• Search
			Channel & Format Definition	a x
		Channel & Format Definition	Define Channel(s) Define Format Default Values (Contact) Default Values (Mailing)	î
ች 🗦 🚭 🖬 🔧	⊛ Can	The record has been saved. Format Definition Format Name Lock Frmail Lyris: Detach mess	Oversionnane-Survey	
Č 🚖		Lyris Mailing List Lyris Message Id E-mail: Send as E-mail from Lyris From Name	HTML mays@ecogreen.com	Proceed

The values are changed from **dirk@ecogreen.com**, Dirk, and "New Product Launch Invitation" to **maya@ecogreen.com**, Maya, and "New Product Launch Event – Ecogreen" respectively. The corresponding changes are reflected in the Lyris message.



Note: Automatic transfer of changes to Lyris can take some time.

Transferring a CRM Target group to Lyris HQ

Learn to transfer a CRM target group to Lyris HQ.

Once you have transferred the marketing activity to Lyris, you have to create the target group and execution definition for the marketing activity, for more information see Adding the Target Group and Execution Definition on page 606. Next, you can transfer the target group to Lyris.

Note: If you try to transfer a target group for a marketing activity before transferring the marketing activity to Lyris, you are reminded to transfer the marketing activity first. The following message displays: "*Target group transfer cannot be started, because marketing activity has not yet been transferred to Lyris. Please retry after transferring the marketing activity to Lyris.*"

Transferring a target group to Lyris involves the following phases:

- Pick CRM Fields—select the CRM fields listed for the info areas. These fields are added as attributes of a contact that is created in Lyris for each of the target group members transferred to Lyris. The CRM fields are limited to the following infoareas:
 - Company (FI)
 - Contact Person (CP)
 - Person (PE)
 - Person in Company (KP)
- Map CRM fields—the fields selected in the first step are mapped to equivalent demographics present in Lyris or new demographics can be created and added to the Lyris demographics.
- 3. Create Segment—associate the target group with a segment in Lyris. This is important because multiple marketing activities can use the same mailing list.

And segments enables you to identify the mailing list members in the context of a marketing activity.

- 4. **Overview**—this phase displays the number of active target group entities that are eligible to be transferred to Lyris.
- 5. Schedule Transfer—this phase schedules the transfer and ensures that the transfer process remains active until all the entities are transferred to Lyris. For example, if a connection time out happens during the transfer to Lyris, then CRM would try again at a later time until the transfer is complete.

On transferring a target group, an instance for each of the target group member is created in Lyris, using their email contact and demographic details. The target group members are then added as participants to the corresponding mailing list created in Lyris. Aurea CRM ensures the inclusion of the target group members to the segment created in Lyris. You can transfer a target group to Lyris HQ from the campaign designer or from the standard editor for marketing activities

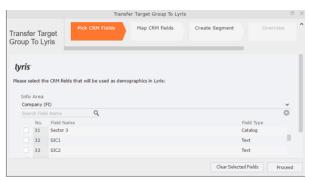
Transferring from the Campaign designer

To transfer a target group for a marketing activity to CRM designer:

1. Open the marketing activity in the campaign designer.



2. Click in the Target Group row. The Transfer Target Group to Lyris page displays.



- 3. Click the Pick CRM Fields tab. To select the required CRM fields to be included as attributes for the contacts in the target group, perform the following:
 - a. Select the required Infoarea from the Info Area dropdown list.
 - b. Click the check box to select the required field from each infoarea. You can search for specific fields by typing the field name in the Search Field Name filter. You can sort the displayed fields by name or type by clicking the respective field headers: Field Name or Field Type.
 - c. Repeat the above steps to select the required fields from different infoareas.

The following fields from the infoareas are not displayed:

- The SeqNo, and StatNo fields.
- The fields for which the user does not have view rights.
- The fields containing email addresses. They are automatically transferred.
- 4. Click Proceed. The Map CRM fields tab gets activated and the following message displays: *Please wait until the mappings between CRM fields and Lyris demographic mappings are loaded...*

Aurea CRM communicates with Lyris server to retrieve the corresponding Lyris demographics and displays the mapping table.

To map the CRM fields listed in the table with the retrieved Lyris demographics, perform the following:

a. Click in the Lyris Demographics column to display the list of demographics retrieved from the Lyris server and select the appropriate demographic for each of the listed CRM field. The demographics listed available are the ones that are compatible with the CRM field based on the CRM Field type. See the screenshot below:

		Transfer Target Group To Lyris	
Transfer Targe Group To Lyris	et	CRM Fields Create Segment	
lyris Please, select the L	yris demographic	s that each of the CRM fields below will be mapped to: Lyris Demographic	
Last Name	Person (PE)	CRM.LastName	+ ~
First Name	Person (PE)	Ι	+ ^
Country	Person (PE)	CRM.ActivityExecutionId	
Date of Birth	Person (PE)	CRM.City CRM.FirstName	
Private customer	Person (PE)	CRM.LastName CRM.LastName CRM.LastName-Demo CRM.PrivateTel CRM.Test CRM-Division CRM-Division 1 CRM-Division 2 CRM-Division 4	

If you cannot find an appropriate Lyris demographic for the CRM field, you can create a new Lyris demographic. See the next step.

- b. To create a new demographic, perform the following:
 - a. Click +. The Create new demographic dialog displays.
 - b. Enter a name for the demographic. A suggested name (name of the corresponding CRM field) is displayed for the demographic to be created in the Name textbox. You can also specify a name according to your preference.
 - c. Select the type of the demographic from the Type field.

In the screenshot below a new demographic for the field private customer is created. It is named CRM.PrivateCustomer and the type selected is a Checkbox.

		Transfer Target Gro	oup To Lyris	
ransfer Target Froup To Lyris	Pick CRM Fields	Map CRM fie	Ids Create Segment Overview	v S
lyris Please, select the Lyr	is demographics that each o	f the CRM fields below v	vill be mapped to:	
CRM Field	Info Area	Lyris Demographic	Create new demographic	×
Last Name	Person (PE)	CRM.LastName		+ ~
First Name	Person (PE)	CRM.FirstName	lyris	+ ~
Country	Person (PE)	CRM.Country1		+ ~
Date of Birth	Person (PE)	CRM.DateOfBirth	EcoGreenInc-NewProductLaunchEvent	+ ~
Private customer	Person (PE)		Name: CRM.PrivateCustomer	+ ~
			Type: Checkbox	
			QK Cancel	
				Proceed

- d. Click OK. The new demographic is created in Lyris.
- e. To view the mapped demographic attributes in Lyris, open Attributes tab and select the required mailing list from the List filter. The Attribute column should show the list of mapped attributes from CRM. See the screenshot below.

lyris <mark>HQ</mark>		Hi Pradeep Kumar. <u>opstest</u> +	Settings Help Logof
Semail Marketing	Dashboard Attributes 💿 +		
🗉 Lists	Email Marketing - Attributes		Options IE.
Attributes		® A	dd 🖉 Edit 🔆 Disable
🍰 Contacts	List: EcoGreenInc-NewProductL		9
Segments		-	
🐟 Campaigns &	Attribute	✓ Type	ID
Messages	Email	Text	0
Le Reports	CRM.PrivateCustomer	Checkbox	32002
Email Test Overview	CRM LastName	Text	31981
Asset Library	CRM.FirstName	Text	31990
	CRM.DateOfBirth	Date	31982
Launch EmailLabs	CRM.Country1	Select List	31978

- 5. Click Proceed. The Create Segment tab displays.
- 6. Click Create Segment. A segment for this mailing list is created in Lyris.

The name of the segment created in Lyris is displayed. Clicking the named URL opens the required Lyris segment in a new tab. The name generated is a concatenation of the name and the record id of the marketing activity.

	Tr	ransfer Target Group To	Lyris	
Transfer Target Group To Lyris	Pick CRM Fields	Map CRM fields	Create Segment	
Lyris Segment exists in Lyris: <u>Invitation_x000006460800022b</u> Create Segment Segment was created in Lyris. Please click on button 'Proceed'	below to proceed to next step.			

When the segment for this target group is created in Lyris, it generates the Segment generated event. You can view the segment information in the Segment tab of the Edit/View Target group window.

7. Click Proceed. The Overview tab displays.

		Transfer Target Group To	o Lyris			0 X
Transfer Target Group To Lyris	Pick CRM Fields	Map CRM fields	Create Segment	Overview	Schedule Transfer	^
Lyris 2 target group entities will be transferred to Lyris. (Active target group entities that are going to be handled using "Email" chan	nel)					

The number of active target group entities that are eligible to be transferred to Lyris is mentioned.

Note: If there are no target group entities for the email channel available to be transferred to Lyris, then a message "*No target group entities are eligible to be transferred to Lyris*" is displayed. You should go back and create the target group.

- 8. Click Proceed. The Schedule Transfer tab displays.
- Click Schedule Target Group Transfer. A tick mark appears signifying that the transfer process is scheduled.

Transfer Target Group To Lyris									
Transfer Target Group To Lyris	Pick CRM Fields	Map CRM fields	Create Segment	Overview	Schedule Transfer				
Lyris \checkmark Transfer of target group to Lyris has been scheduled. Schedule Target Group Transfer									

10.To check the status of the transfer, open the Collaboration > To-Dos menu and search for the required scheduled activity. The status of the scheduled transfer should be visible. The following screenshot shows the status of the transfer is In Progress.

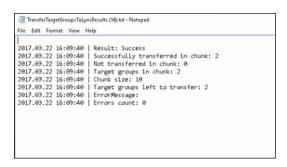
Campaign	Designer / Campaign ×	📓 Search To-Dos 🛛			
Search T	o-Dos Rep/Group ID <u>Super User</u>			Type Add a value	~
-	Due on MM/DD/mm		~	Status Add a value	~
	+ Add more .		~	With me	
Max. 15 ¥	records per page				Start Search
Search R	esults				
N 2	Due on	Туре		Status	Subject
∎= = ~	03/22/2017	Calculate	(here)	In Progress	
	03/22/2017	Calculate	Ð	Completed	
	03/22/2017	Calculate		Completed	
io (03/22/2017	Calculate		Completed	
	02/22/2017	Caleslate		Completed	

The transfer status changes to Completed, once the target group is transferred successfully.

11.To view the details of the transfer process, open the scheduled entity from the To-Do search list. The Related Data tab contains a link to a text file that contains information about the target group transfer process.

Crm	🕝 Campaign Designer / Campaign × 🔡 To-Do - Cal	culate K	
-	To-Do - Calculate		
	Edit V Save @ Cancel	ber User	
1	Type Ca Link <u>03</u>		
	Subject Appointments Details		
	Due on 03, Starts on 03, Ends on 03,	/22/2017	
2	Duration		
80	Related Data		
	2 Title	Keyword	Size (bytes)
	TransferTargetGroupsToLyrisResults.txt		155

Open the document to find the information on the transfer process.



- 12.You can check the contacts created in Lyris for the transferred target group members. To list the contacts in Lyris and view the contact details created, perform the following:
 - a. Open the Contacts tab and select the mailing list from the List filter. The contacts created for his mailing list is displayed.



b. Click View to open the details of the contact generated. The View Contacts dialog displays.

			Attributes			
Email:	john smith 1@ aurea.com		First Name	John 🕞		
			Last Name	Smith		
Status:	C Active		CRM.ActivityExecutionId	x000000640000022b		
	Proof Contact		CRM.Country	Deutschland		Ŧ
Added:	Mar 22, 2017 7:00 AM		CRM.DateOfBirth	01/03/17		
Apply	enabled triggers		CRM.PrivateCustomer			
			Last Name-Demo			
Inail Hist	ory			Sert	Opened Clic	\$Thru
Email Sut	iject Line	Message	Name		Sent	
			No Data Av			
			No Results Found			

The field values of the mapped fields are transferred from CRM and populated in the corresponding mapped demographics in Lyris

Transferring from the Standard Editor

If you prefer to use the standard editor for creating marketing activities instead of the Campaign Designer, you can still transfer a marketing activity to Lyris from the standard editor.

To transfer a marketing activity from the standard editor to Lyris, perform the following:

- 1. Select Marketing > Marketing Activities from the CRM menu. The Search Marketing activities page displays.
- 2. Enter the search filters and click Start Search. The search results list displays.
- 3. Open the context menu of the required marketing activity from the result list and select **Tab View** or **Tree View**. The **Marketing Activity window** displays.

					۲.	v	>
Marketing Activity Inivitation, V	ariation						
	🔲 Calculate 🦂 Create target group 🗴	Start Marketing Activity Transfer Ta	rget Group To Lyris 📙 🗿 🗑				
Marketing Activity Inivit	ation						
Starts on 05/25	i/2016		Ends on 05/28/2016				
Variant			Resp. Rep ID Super User				
Level			Sales Cycle				
Marketing Activity Details Extras							
Status Scheo	duled		Туре				
Execution status			Campaign starts on				
Campaign status Schee	duled		Campaign ends on				
Event Location							
Text							
Parent Data Related Data							-
	a la contra la com						-
Graph × Target Group × Responses	s × Reps × Activities × Mailin	gs × Work Orders × Execution	× Statistics × Document Links ×				
🗒 Add Company 🚨	Add Person in Company 🛛 🚨 Add Persor	Add Contact Person 👚 Add from	m Company Favorites 👚 Add Person in C	Company from Favorites	Add from Perso → Display		
J Company	Person	Rep ID	Marketing Activity	Response	Inactive	e Genera	a
Company Super User	Person Super User	Super User	Inivitation				

Note: Double clicking a marketing activity from the result list opens the marketing activity in the campaign designer.

- 4. Select Related Data > Target Group tab.
- 5. If there are no items listed in the Target Group Tab, click on the **Create Target Group** link.
- 6. Once your target group is defined, click the Transfer Target Group to Lyris link. The Transfer Target Group to Lyris page displays.

			Transf	er Target Group To Lyri	s		
ransfe Group		rget	ck CRM Fields	Map CRM fields	Create Segment	Ove	erview
lyris		o CDM Folds that	will be used as demo	graphics in Lyris:			
Flease st	erect th	e crustineus unac	the be used as define				
Info Com	Area apany (FI)					×
Info Com	Area apany (Q			Field Type	ŏ
Info Com	Area npany (rch Fiel No.	FI) d Name				Field Type Catalog	
Info Com Sear	Area npany (rch Fiel No.	FI) d Name Field Name					
Info Com Sear	Area pany (rch Fiel No. 31 32	FI) d Name Field Name Sector 3				Catalog	0

7. The rest of the steps to transfer the target to Lyris from the standard editor is similar to the way the target group is transferred from the Campaign Designer. Perform the steps 3 to 12 as described in the topic Transferring from the Campaign designer on page 647.

The remaining sections in this chapter talk about the effect of making changes to the target group in Aurea CRM and the corresponding changes in Lyris.

Adding or Deleting member(s) from a Target group

When you add a member to or delete a member from a target group that is already transferred to Lyris, a corresponding member entity is added or deleted from the corresponding mailing list on Lyris.

Adding a member to the target group

In the screenshots below, a fourth member is added to the target group and the corresponding change in Lyris is shown.

			🖧 Edit Target	t Group				- 2
Edit Targe	t Group	Campaign Event 2 Starts on 05/26/2 Ends on 06/16/2	016		pe Simple us In Progress	Resp. Re Edit target		2
Max. 15 🗸	Company Rep ID + Add more records per page	<u>88</u> >	In	Name		Start Search		
Search R	Results	Set Inactive 🗙 Delefe 💄	Add Person 🙎 Ad	ld Person in Com	pany 💄 Add Contact P	erson 🗒 Add Compa	any 🗸 🔣 🗸 🗄	🗱 Modify List Fields
1	Company	Person	Rep ID		Response Genera	ted In	nacti Executed	Lyris Contact
		Travis Conner	Super User					
	Tonzone1		Super User					lyris
	Stancare	Luz Yates	Super User					lyris
		Marie Cole	Super User					lyris

As visible in the screenshot above, a new member (Travis Conners) is added to the target group. The user is automatically added to the corresponding mailing list participants on Lyris, as shown in the screenshot below.

			-		
	SEARCH	FIND		UNSUBSCRIBE	
ctive Members	Proof List Unsubscribed Bo	unced Admin Trash	All Trashed		Configure D
members					
Profile	Email	First Name	Last Name	Address	Company Name
	annete_cole_new@example.com	Marie	Cole	Glenwood Avenue	
				Grove Avenue	Tonzone1
	info@tonzone.com				
	info@tonzone.com luz_yates@stancare.com	Luz	Yates	9236 Hudson Street	Stancare

As you can see the new person is added to the list of active participants in the corresponding mailing list.

Deleting a member from the target group

If you delete a member from the target group on Aurea CRM, the corresponding mailing list member in Lyris is moved from **Active members** to the **Admin Trash** list.

	Delete						
PE.							lyris
- C	Stancare Set Inactive	Luz Yates	Super User				lyris
	Tonzone1		Super User				lyris
		Travis Conner	Super User				lyris
1	Company	Person	Rep ID	Response	Generated	Inacti Executed	Lyris Contact

Member Marie Cole is deleted from the target group.

CRM-Event (x00000064	40000001c)				Jun 07, 2016 ? User Guid	e Contact Support	Logo
Member Record	ds ⊨ View Records						
		SEARCH TRASHED ADD	RESSES		FIND		
							2
Active Members	Proof List Unsub	cribed Bounced	Admin Trash	All Trashed		Configu	re Dis
1 members							
Profile	Email		First Name	Last Name	Address	Company Name	
🗉 🔍 🏹	annete_cole_new@e>	ample.com	Marie	Cole	Glenwood Avenue		
	ELETE CHECKED	2					

Member Marie Cole is moved from Active Members list to Admin Trash list.

Activating or deactivating a target group entity

Deactivating a target group member in Aurea CRM, moves the corresponding member record to the unsubscribed list in Lyris. The following screenshot shows the person entity (Travis Conners) deactivated (**Inactive**) in **Edit Target Group** window.

		🖧 Edit Target G	roup		· 기
Edit Target Group	Campaign Event 2 Starts on 05/26/2 Ends on 06/16/2	2016	Type Simple Status In Progress	Resp. Rep ID s Edit target gr	
Company Rep ID + Add more Max. 15 • records per page	88 V		me 2 me	Start Search	
Search Results	Set Inactive 🗙 Delete 🛔	Add Person 💄 Add F	Person in Company 🙎 Add	Contact Person 🖩 Add Company	🗸 🚺 🗸 🛱 Modify List Fields
Company	Person	Rep ID	Response	Generated Inacti	Executed Lyris Contact
		Super User		⊻	tyris
Tonzone1		Super User			lyris
Stancare	Luz Yates	Super User			tyris
	Marie Cole	Super User			lyris

The corresponding entity is now moved to the unsubscribed list of member records in Lyris.

CRM-Event (x000000640000001c)			Jun 07, 2016 ? User Guide	e Contact Support 🔒 Logout
Member Records > View Records				
SEARCH TRASHED ADDRE	SSES		FIND	
Active Members Proof List Unsubscribed Bounced	Admin Trash	All Trashed		Configure Display
1 members				
1 members Profile Email	First Name	Last Name	Address	Company Name
	First Name Travis	Last Name Conner	Address 8140 Garfield Avenue	Company Name
Profile Email				Company Name
Profile Email				Company Name

Similarly, activating an inactive member in the **Edit Target Group** window, moves the member record in Lyris from the **Unsubscribed** list to the **Active Members** list.

Changing the attributes of a target group entity

If the attribute of a target group member already transferred to Lyris is changed, the changes are automatically transferred to Lyris.

In the following screenshots the last name of person entity Conner is changed to Smith, and his email id is changed to the same is reflected in Lyris.

						< ~
vis Smith						
u 🖉 Edit 🗸 Save 🙆 Cancel 🗍	N Ro Select Affiliates					
1 2 content 1 2	g · @ select Animotes					
Form of address	~	Street	8140 Garfield Avenue		Photo	Q
First Name Travis		Postal Code				
Last Name Smith		City	Berlin			
Acad. Title	~	Country	Germany	+ ~		
E-mail travis_conner_new	example.com 🖂	Private Tel.		C		
Date of Birth MM/DD/YYYY	~	Private mobile tel.		e,		
Language	+ ~	Nationality		+ ~		
Rep ID	- <u>8</u>	Office Rep ID		91		
ABC	1	Lead Status	Cold	~	LinkedIn	6
					Xing	÷
					Twitter	٢
					Google+	Ð
					Facebook	•

The corresponding changes to the member record in Lyris is shown in the screenshot below.

	SEARCH	FIND		UNSUBSCRIBE	
					2
tive Members	Proof List Unsubscribed Bou	nced Admin Trash	All Trashed		Configure Disp
members			Pla Hashed		
Profile	Email	First Name	Last Name	Address	Company Name
	info@tonzone.com			Grove Avenue	Tonzone1
🔍 🌛					
	luz_yates@stancare.com	Luz	Yates	9236 Hudson Street	Stancare

Transferring from the Campaign designer

To transfer a target group for a marketing activity to CRM designer:

1. Open the marketing activity in the campaign designer.



2. Click in the Target Group row. The Transfer Target Group to Lyris page displays.

			trans	sfer Target Group To Ly	115		
	er Tai To Ly	rget	ck CRM Fields	Map CRM fields	Create Segm	ov	erview
lyris							
			will be used as dom	encephics in Loris			
		e CRM fields that	will be used as dem	tographics in Lyns:			
Info	Area		will be used as dem	rographics in Lyns:			v
Info Com	o Area npany (I		Q.	rographics in Lyns:			č
Info Com	o Area npany (I	FI)		rographics in Lyris:		Field Type	
Info Com	Area Apany (I rch Field No.	FI) d Name		rographics in Lyris:		Field Type Catalog	
Info Com Sear	Area Apany (I rch Field No.	FI) d Name Field Name		rograpnics in Lyris:			
Info Com Sear	Area Apany () rch Field No. 31 32	FI) d Name Field Name Sector 3		rograpnics in Lyris:		Catalog	

- **3.** Click the Pick CRM Fields tab. To select the required CRM fields to be included as attributes for the contacts in the target group, perform the following:
 - a. Select the required Infoarea from the Info Area dropdown list.
 - b. Click the check box to select the required field from each infoarea. You can search for specific fields by typing the field name in the Search Field Name filter. You can sort the displayed fields by name or type by clicking the respective field headers: Field Name or Field Type.
 - c. Repeat the above steps to select the required fields from different infoareas.

The following fields from the infoareas are not displayed:

- The SeqNo, and StatNo fields.
- The fields for which the user does not have view rights.
- The fields containing email addresses. They are automatically transferred.
- 4. Click Proceed. The Map CRM fields tab gets activated and the following message displays: Please wait until the mappings between CRM fields and Lyris demographic mappings are loaded...

Aurea CRM communicates with Lyris server to retrieve the corresponding Lyris demographics and displays the mapping table.

To map the CRM fields listed in the table with the retrieved Lyris demographics, perform the following:

a. Click in the Lyris Demographics column to display the list of demographics retrieved from the Lyris server and select the appropriate demographic for each of the listed CRM field. The demographics listed available are the ones that are compatible with the CRM field based on the CRM Field type. See the screenshot below:

		Transfer Target Group To Lyris	
ransfer Targe roup To Lyris	et	Create Segment	
lyris			
lease, select the L	yris demographics	s that each of the CRM fields below will be mapped to:	
CRM Field	Info Area	Lyris Demographic	
Last Name	Person (PE)	CRM.LastName	+ ~
First Name	Person (PE)	Ι	+ ^
Country	Person (PE)	CRM.ActivityExecutionId	
Date of Birth	Person (PE)	CRM.City	_
Private customer	Person (PE)	CRM.FirstName CRM.LastName	
	,	CRM.LastName-Demo	
		CRM.PrivateTel	
		CRM.Test	
		CRM-Division	
		CRM-Division1	
		COM Division 3	
		CRM-Division2	
		CRM-Division2 CRM-Division4 CRM-Division-5	

If you cannot find an appropriate Lyris demographic for the CRM field, you can create a new Lyris demographic. See the next step.

- b. To create a new demographic, perform the following:
 - a. Click +. The Create new demographic dialog displays.
 - b. Enter a name for the demographic. A suggested name (name of the corresponding CRM field) is displayed for the demographic to be created in the Name textbox. You can also specify a name according to your preference.

c. Select the type of the demographic from the Type field.

In the screenshot below a new demographic for the field private customer is created. It is named CRM.PrivateCustomer and the type selected is a Checkbox.

		Transfer Target Gro	oup To Lyris	
ransfer Target Group To Lyris	Pick CRM Fields	Map CRM fie	Ids Create Segment Overview	
lyris Please, select the Lyr	is demographics that each o	f the CRM fields below v	vill be mapped to: Create new demographic ×	
Last Name	Person (PE)	CRM.LastName		+ ~
First Name	Person (PE)	CRM.FirstName	lyris	+ ~
Country	Person (PE)	CRM.Country1		+ ~
Date of Birth	Person (PE)	CRM.DateOfBirth	EcoGreenInc-NewProductLaunchEvent	+ ~
Private customer	Person (PE)		Name: CRM.PrivateCustomer	+ ~
			Type: Checkbox	

- d. Click OK. The new demographic is created in Lyris.
- e. To view the mapped demographic attributes in Lyris, open Attributes tab and select the required mailing list from the List filter. The Attribute column should show the list of mapped attributes from CRM. See the screenshot below.

lyr	is <mark>hq</mark>				н	Pradeep Kumar. <u>opstest</u> ~	Settings Help Logoff
-	Email Marketing	Dashboard Attributes	0 +				
	Lists	Email Marketing - Attributes					Options II.,
۹	Attributes					® A	55 CEdit 🙀 Disable
20	Contacts	List: EcoGreenInc-NewProductL v					9
¢	Segments	Attribute				Туре	ID
•	Campaigns & Messages		_				NO IN
ian.	Reports	Email CRM.PrivateCustomer				Text Checkbox	0
_							32002
۲	Email Test Overview	CRM.LastName				Text	31981
	Asset Library	CRM.FirstName				Text	31990
_		CRM.DateOfBirth				Date	31982
습	Launch EmailLabs	CRM.Country1				Select List	31978

- 5. Click Proceed. The Create Segment tab displays.
- 6. Click Create Segment. A segment for this mailing list is created in Lyris.

The name of the segment created in Lyris is displayed. Clicking the named URL opens the required Lyris segment in a new tab. The name generated is a concatenation of the name and the record id of the marketing activity.

	Tr	ansfer Target Group To	Lyris	
Transfer Target Group To Lyris	Pick CRM Fields	Map CRM fields	Create Segment	
Lyris Segment exists in Lyris: <u>Invitation x000000610000022b</u> Create Segment Segment was created in Lyris. Please click on button 'Proceed' belo	w to proceed to next step.			

When the segment for this target group is created in Lyris, it generates the Segment generated event. You can view the segment information in the Segment tab of the Edit/View Target group window.

7. Click Proceed. The Overview tab displays.



The number of active target group entities that are eligible to be transferred to Lyris is mentioned.

Note: If there are no target group entities for the email channel available to be transferred to Lyris, then a message "*No target group entities are eligible to be transferred to Lyris*" is displayed. You should go back and create the target group.

- 8. Click Proceed. The Schedule Transfer tab displays.
- **9.** Click Schedule Target Group Transfer. A tick mark appears signifying that the transfer process is scheduled.

Transfer Target Group To Lyris								
Transfer Target Group To Lyris	Pick CRM Fields	Map CRM fields	Create Segment	Overview	Schedule Transfer			
Lyris V Transfer of target group to Lyris has been scheduled. Schedule Target Group Transfer								

10.To check the status of the transfer, open the Collaboration > To-Dos menu and search for the required scheduled activity. The status of the scheduled transfer should be visible. The following screenshot shows the status of the transfer is In Progress.

Crm	⊖ Campaign	Designer / Campaign 🗵	📓 Search To-Dos	¢		
ĭ 1 ₪	Search To	D-DOS Rep/Group ID <u>Super Use</u> Due on <u>MN/DD///</u> + Add more records per page		*	Type Add a value Status Add a value With me	v v Start Search
Û	Search R					
		Due on	Туре		Status	Subject
·	∎∃ ~	03/22/2017	Calculate	Ð	In Progress	
2		03/22/2017	Calculate	0	Completed	
		03/22/2017	Calculate		Completed	
80		03/22/2017	Calculate		Completed	
~		02/22/2017	Calendate		Completed	

The transfer status changes to Completed, once the target group is transferred successfully.

11.To view the details of the transfer process, open the scheduled entity from the To-Do search list. The Related Data tab contains a link to a text file that contains information about the target group transfer process.

Crm	🐵 Campaign Designer / Campaign 🛛 📓 To-Do - Calculate 🐋		
2	B To-Do - Calculate ≣ Menu		
	Rep/Group ID Super User Type Calculate Link <u>0.07/27/2017 3:09 pm</u> Subject Details Due on 03/22/2017 Starts on 03/22/2017 Ends on 03/22/2017 Ends on 03/22/2017 Duration		
80	Related Data Document Links × Inte Inte Inte Inte Inte	Keyword	Size (bytes) 155

Open the document to find the information on the transfer process.

2017.03.22 16:09:40	Result: Success	
2017.03.22 16:09:40	Successfully transferred in chunk: 2	
2017.03.22 16:09:40	Not transferred in chunk: 0	
2017.03.22 16:09:40	Target groups in chunk: 2	
2017.03.22 16:09:40	Chunk size: 10	
2017.03.22 16:09:40	Target groups left to transfer: 2	
2017.03.22 16:09:40	EnnonMessage:	
2017.03.22 16:09:40	Errors count: 0	

- 12.You can check the contacts created in Lyris for the transferred target group members. To list the contacts in Lyris and view the contact details created, perform the following:
 - a. Open the Contacts tab and select the mailing list from the List filter. The contacts created for his mailing list is displayed.



b. Click View to open the details of the contact generated. The View Contacts dialog displays.

			Attributes			
Email:	johnsnith1@aurea.com		First Name	John D		
			Last Name	Smith		
Status: Active Proof Contact Added: Mar 22, 2017 7:00 AM Apply enabled triggers			CRM.ActivityExecutionId	x000000640000022b		
			CRM.Country	Deutschland	(v)	
			CRM.DateOfBirth	CRM.DateOfBirth 01/03/17		
			CRM.PrivateCustomer			
			Last Name-Demo			
Email Hist	bry			Sert	Opened OlickThru	
Email Hist Email Sul	bry bject Line	Message	Name	Sert	Opened ClickThru Sent	
			Name No Data Av No Results Found			
					appende anorthe	

The field values of the mapped fields are transferred from CRM and populated in the corresponding mapped demographics in Lyris

Transferring from the Standard Editor

If you prefer to use the standard editor for creating marketing activities instead of the Campaign Designer, you can still transfer a marketing activity to Lyris from the standard editor.

To transfer a marketing activity from the standard editor to Lyris, perform the following:

- 1. Select Marketing > Marketing Activities from the CRM menu. The Search Marketing activities page displays.
- 2. Enter the search filters and click Start Search. The search results list displays.
- 3. Open the context menu of the required marketing activity from the result list and select **Tab View** or **Tree View**. The **Marketing Activity window** displays.

					۲.	~	>
Marketing Activity Inivitation, Variation							
Edit 🗸 Save ⊘ Cancel 🖩 Calcula	te 🖧 Create target group	>> Start Marketing Activity Transfer Targe	et Group To Lyris 📙 🗱 🗃				
Marketing Activity Inivitation							
Starts on 05/25/2016			Ends on 05/28/2016				
Variant			Resp. Rep ID Super User				
Level			Sales Cycle				
Marketing Activity Details Extras							_
Status Scheduled			Туре				
Execution status			Campaign starts on				
Campaign status Scheduled			Campaign ends on				
Event Location							
Text							
							_
Parent Data Related Data						100	~ =
Graph × Target Group × Responses × Re	os × Activities × Mai	lings × Work Orders × Execution ×	Statistics X Document Links				
🗒 Add Company 🚨 Add Perso	n in Company 💄 Add Pers	ion 💄 Add Contact Person 🌟 Add from 1	Company Favorites 🔺 Add Person in	Company from Favorites	Add from Per	son Favori	tes
						y All Reco	
d Company	Person	Rep ID	Marketing Activity	Response	Inact	ive Gene	ra
Company Super User	Person Super User	Super User	Inivitation				_

Note: Double clicking a marketing activity from the result list opens the marketing activity in the campaign designer.

- 4. Select Related Data > Target Group tab.
- 5. If there are no items listed in the Target Group Tab, click on the **Create Target Group** link.
- 6. Once your target group is defined, click the Transfer Target Group to Lyris link. The Transfer Target Group to Lyris page displays.



7. The rest of the steps to transfer the target to Lyris from the standard editor is similar to the way the target group is transferred from the Campaign Designer. Perform the steps 3 to 12 as described in the topic Transferring from the Campaign designer on page 647.

The remaining sections in this chapter talk about the effect of making changes to the target group in Aurea CRM and the corresponding changes in Lyris.

Adding or Deleting member(s) from a Target group

When you add a member to or delete a member from a target group that is already transferred to Lyris, a corresponding member entity is added or deleted from the corresponding mailing list on Lyris.

Adding a member to the target group

In the screenshots below, a fourth member is added to the target group and the corresponding change in Lyris is shown.

			R _q Edit	t Target Group				
Edit Target	t Group	Campaign Eve Starts on 05/ Ends on 06/	26/2016		Type Simple Status In Progres		. Rep ID irget gr	200
Max. 15 🗸	Company Rep ID + Add more records per page		90 >	Last Name Inactive ? With me		Start Search		
Search R	lesults	Set Inactive 🔀 Delete	🙎 Add Person	🚨 Add Person in	Company 💄 Add	Contact Person 🗒 Add Co	mpany 🗸 🕅 🗸	🕼 Modify List Fields
1	Company	Person	Rep ID		Response	Generated	Inacti Executed	Lyris Contact
		Travis Conner	Super User					
	Tonzone1		Super User					lyris
1	Stancare	Luz Yates	Super User					lyris
		Marie Cole	Super User					lyris
1								

As visible in the screenshot above, a new member (Travis Conners) is added to the target group. The user is automatically added to the corresponding mailing list participants on Lyris, as shown in the screenshot below.

- Member 1	Records . View Records		-		
	SEARCH	FIND		UNSUBSCRIBE	
					2
Active Members	Proof List Unsubscribed Bo	unced Admin Trash	All Trashed	1	Configure Di
members					
Profile	Email	First Name	Last Name	Address	Company Name
1 Torne					
	annete_cole_new@example.com	Marie	Cole	Glenwood Avenue	
	annete_cole_new@example.com info@tonzone.com	Marie	Cole	Glenwood Avenue Grove Avenue	Tonzone1
۵ 💭		Marie Luz	Cole Yates		Tonzone1 Stancare

As you can see the new person is added to the list of active participants in the corresponding mailing list.

Deleting a member from the target group

If you delete a member from the target group on Aurea CRM, the corresponding mailing list member in Lyris is moved from **Active members** to the **Admin Trash** list.

1	Company	Person	Rep ID	Response	Generated	Inacti Executed	Lyris Contact
		Travis Conner	Super User				lyris
	Tonzone1		Super User				tyris
	Stancare	Luz Yates	Super User				lyris
	Set Inactive	Marie Cole	Super User				lyris
_	× Deigte	1					

Member Marie Cole is deleted from the target group.

CRM-Event (x000000640000001c)	Jun 07, 2016 ? User Guid	e Contact Support 🔒 Logout
Wember Records > View Records		
SEARCH TRASHED ADDRESSES	FIND	
		2
Active Members Proof List Unsubscribed Bounced Admin Trash	All Trashed	Configure Display
1 members		
Profile Email First Name	Last Name Address	Company Name
annete_cole_new@example.com Marie	Cole Glenwood Avenue	
RESTORE CHECKED DELETE CHECKED		
Select All De-select All		

Member Marie Cole is moved from Active Members list to Admin Trash list.

Activating or deactivating a target group entity

Deactivating a target group member in Aurea CRM, moves the corresponding member record to the unsubscribed list in Lyris. The following screenshot shows the person entity (Travis Conners) deactivated (**Inactive**) in **Edit Target Group** window.

		🖧 Edit Target (Group			
dit Target Group	Campaign Eve Starts on 05/ Ends on 06/	26/2016	Type Simple Status In Progre		Rep ID get gr	
Company Rep ID + Add more Max. 15 • records per page		-	lame ctive ? h me	Start Search		
Search Results	Set Inactive 🗙 Delete	e 🚊 Add Person 💄 Add	Person in Company 💄 Ad	d Contact Person 🖩 Add Cor	npany 🗸 🗐 🗸 🛱	Modify List Field
Company	Person	Rep ID	Response	Generated	Inacti Executed	Lyris Contact
₽ = ×	Travis Conner	Super User			Z	lyris
		Super User				lyris
Tonzone1		Super Oser				Guis
Tonzone1 Stancare	Luz Yates	Super User				lyris

The corresponding entity is now moved to the unsubscribed list of member records in Lyris.

R CRM-Event (x000000640000001c)			Jun 07, 2016 ? User Guide	e Contact Support 🔒 Logout
Wember Records ▹ View Records				
SEARCH TRASHED ADDRE	SSES		FIND	
Active Members Proof List Unsubscribed Bounced	Admin Trash	All Trashed		Configure Display
1 members				
Profile Email	First Name	Last Name	Address	Company Name
🔲 🔯 travis_conner@example]com	Travis	Conner	8140 Garfield Avenue	
RESTORE CHECKED DELETE CHECKED				
Select All De-select All				

Similarly, activating an inactive member in the **Edit Target Group** window, moves the member record in Lyris from the **Unsubscribed** list to the **Active Members** list.

Changing the attributes of a target group entity

If the attribute of a target group member already transferred to Lyris is changed, the changes are automatically transferred to Lyris.

In the following screenshots the last name of person entity Conner is changed to Smith, and his email id is changed to the same is reflected in Lyris.

							< ×
avis Smith							
nu 🖉 Edit 🗸 S	ave 🙋 Cancel 🚊 🛩 🗞 Select Affili	ates					
Form of address		~	Street	8140 Garfield Avenue		Photo	۹
First Name	Travis		Postal Code	12345			
Last Name	Smith		City	Berlin			
Acad. Title		~	Country	Germany	+ ~		
E-mail	travis_conner_new@example.com	\times	Private Tel.		C		
Date of Birth	MM/DD/YYYY	~	Private mobile tel.		e.		
Language		+ ~	Nationality		+ ~		
Rep ID		9	Office Rep ID		91		
ABC	1		Lead Status	Cold	~	LinkedIn	۲
						Xing	© ©
						Twitter	٢
						Google+	
						Facebook	۲

The corresponding changes to the member record in Lyris is shown in the screenshot below.

CRM-Event (x00	0000640000001c) lecords ⊳ View Records			Jun 07, 2016 ? User Guide	Contact Support 🔒 Logout
	SEARCH	FIND		UNSUBSCRIBE	
					Configure Display
Active Members	Proof List Unsubscribed Bounced	Admin Trash	All Trashed		configure oropia;
3 members					
Profile	Email	First Name	Last Name	Address	Company Name
Q	info@tonzone.com			Grove Avenue	Tonzone1
۵	luz_yates@stancare.com	Luz	Yates	9236 Hudson Street	Stancare
🔍 🤰	bavis_conner_new@example.com	Travis	Smith	8140 Garfield Avenue	

20 Campaign Management (Enterprise CRM) – LSI and FSI

Learn to design and manage marketing campaign in Aurea CRM.

CampaignManagement(EnterpriseCRM)overview

The Campaign designer allows you to quickly create a campaign in an intuitive way and uses a graphical representation to make the campaign design process simple.

You can create campaigns and their marketing activities with clear representation of the works flows involved. Campaigns, marketing activities, and response are represented as containers in the graphical view.

Note: Campaign management is an enterprise feature, you need to have enterprise license for Aurea CRM to use this feature.

Components of the Campaign Management:

- Campaign calendar
- Campaign Designer

Working with Campaign Calendar

The campaign calendar shows all the campaigns and marketing activities.

You can start a new campaign from this window by clicking the Create New Campaign button. You can also select and open a campaign shown in this window to open it in the campaign designer.

The following screenshot shows a campaign calendar.

	Channel & Format	Definition			
hannel & Format efinition	Define Channel(s)	Define Format	Define Default Values		
v					
Default Values Name: Lock		nternal_x00000064000000	4d		
*					
Type 📞 Telephone	*	Status Sch	eduled	~	
Starts on MM/DD/YYYY	~	Ends on MM	DD/YYYY	~	
Starts at		Ends at			
Priority 🚖 🚖 🚖		Create To-Do			
Result	~	Private			
Subject					
Subject Details Links Marketing Activit	Survey Activity Details				
Rep ID	9	Assigned by Rep ID		9	
Participant ID Required Add a	value				
Optional Add a	value				
For Add a	value			<u> </u>	
			Load Default Values Sa	ve Default Values	Proceed

The campaign calendar tab at the top is visible when you open any campaign.

Working with Campaign Designer

You can create, edit, and delete campaigns and their marketing activities in the campaign designer.

You can create a new campaign using an existing campaign as a template or create a new campaign from scratch.

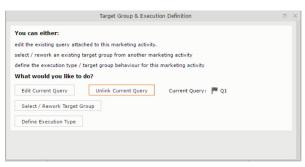
Creating a new campaign from scratch

To create a new campaign from scratch, perform the following steps:

1. Click the Marketing menu icon, and select New Campaign from the menu.

Current Query: 🏴 Q1

2. Click Empty Campaign.

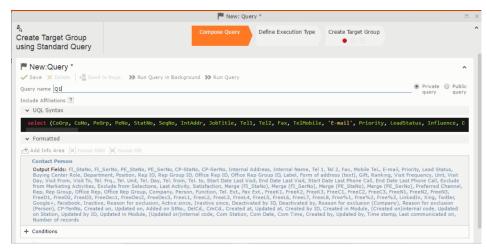


3. Enter the following details in the New Campaign window:

Note: All fields that are in orange are mandatory fields.

- **Name** Enter a name for the campaign. (Mandatory field)
- Starts On Enter the start date of the campaign. (Mandatory field)

- **Type** Select the type of the campaign: Event; Questionnaire; or User Satisfaction. (Mandatory field)
- Target Group Size (Target) Enter the number of recipients expected to participate in the campaign.
- Ends On Enter the end date of the campaign.
- Status Select the status of the campaign. (Mandatory field)
- **Costs**: Enter the estimated cost of the campaign.
- Currency Enter the currency in which the campaign cost is estimated.
- **Resp.Rep ID** Enter the ID of the responsible rep for the campaign.
- **Budget approval required** Select the check box if an approval is required for the estimated budget of the campaign.
- Verification required Select the check box if a verification is required for the campaign.
- 4. Click Save. The Campaign Designer opens.



5. To add marketing activity to the campaign, click the context menu on the right of the campaign container. You can select an existing marketing activity or create a new marketing activity from scratch.

		🏴 Query	Q1		
್ಧೆ Create Target Group using Standard Query		Compose Query	Define Execution Type	Create Target Group	
V Proceed					
*Edit target group until	04/05/2016				~
*Execution Type					^
	One-off, execute selection/query				
	One-off, do not execute selection				
	One-off, only response processing				
	Repeated, always execute selection/q	luery			
	Repeated, execute selection once				
	Repeated, never execute selection				
	Repeated, only response processing				
	Repeated, packages Repeated, extend selection/query				
	Repeated, extend selection/query				

- To use an existing marketing activity:
 - 1. From the context menu select **Reuse Marketing Activity**. The **Reuse Marketing Activity** window opens.
 - 2. Search for the marketing activities from a campaign and select it from the search list.
 - 3. Enter a New Start Date for the marketing activity, in the resulting window.

	P Query	Q1		×
♣ Create Target Group using Standard Query	Compose Query	Define Execution Type	Create Target Group	^
You can now attempt to create the target group, by clicking the buttor Create Target Group	1 below.		Create Target Group	

Note: If you do not provide a start date for the marketing activity then the start date on the reused marketing activity is used as start date.

4. Click OK. The marketing activity and its descendent marketing activities are added to the campaign designer.

	🏴 Query		
[#] α Create Target Group using Standard Query	Compose Query	Define Execution Type	Create Target Group
Target group cannot be created because of the following reasons: 1. Execution Type has not been defined. 2. Edit target group until date has not been defined. Create Target Group	L _S		

- 5. Next you can make further additions to the marketing activity.
- To create a new marketing activity:
 - 1. From the context menu select **New Marketing Activity**. The **New Marketing Activity** window opens.

3		📢 Survey	03/29/2016 - 03/31/2016	≡ ^
20		1. Channels	🐛 (0) 🔛 (0) @(0) 💻 (0) 🖶 (0)	. (0)
W ¹		2. Target Group	🍓 (0) 💐 (Until 04/05/2016)	
_		3. Execution	🖗 🔳 C	
_		4. Responses	*	
3	Notification		v	
	Notification		^	
The server	will now generate the target group and will	inform you when this	is complete. No Response	(0)
	Close		*	

- 2. Enter the following details for the new marketing activity:
 - **Marketing activity** Select the marketing activity type from the following: Confirmation, Event, Follow-up, Invitation, Survey, Survey-remainder. (Mandatory field)
 - Starts on The start date for the marketing activity.
 - Ends-on The end date for the marketing activity.
 - **Resp.Rep ID** The ID of the rep responsible for the marketing activity.
 - **Costs** The estimated cost of the marketing activity.
 - Currency Select the currency the cost is estimated in.
 - **Text** Provide a description and other relevant information in this text field.
- 3. Click Save to create the new marketing activity container in the campaign



Note: A blue arrow points from the campaign container to the marketing activity container.

- 4. In the next step you need to define some responses for this marketing activity.
- 6. The context menu for the marketing activity container allows you to perform the following: Define responses, Channel and Format definition; Target group and Execution definition; Edit Target group; Notify Rep; Edit/View Responses (Activities); Edit the marketing activity; Delete; Delete (including Generated Record).

In this case we define a response to the survey marketing activity, we have defined.

2

7. Select **Define Responses** from the context menu. A pop-up window is displayed.

			🖧 Edit Tar	get Group		
Edit Target	t Group	Star	aign Questionnaire ts on 03/25/2016 Is on 04/06/2016	Type Questionnaire Status Scheduled	Resp. Rep ID Edit target g 04/05/2	016
	Company Rep ID + Ad	d more	<u>*</u>	Last Name Inactive ? With me		
Max. 15 🗸	records per page				Start Searc	h
Search R	lesults	Set Inactive 🗙 Delete 💄	Add Person 💄 Add Person	in Company 💄 Add Contact Pers	son 🛱 Add Company 🗸 🕅 🖌 🛛	🏟 Modify List Fields
1	Company	Person	Rep ID	Respon	se Generated In	acti Executed
	Zummatechi	Orlando Rizz	i		>	
1	Zummatechi	Carlene Mcn	ary		\checkmark	
	Zummatechi	John Smith			\checkmark	
	Lamplanet	Tonia Merter	15		\checkmark	

Note: The list of available responses are defined in the catalog entries for marketing activities. If no entries are present you get the catalog entries window and you have to define the response catalog entries in that window.

8. Select the responses you want to define and click **OK**. The responses are added to the graph view under marketing activity container.

		a Create Target Group using Quick Query									
	ام Create Target Gr using Quick Que		Compose Query	Run C	Query	Finalize Query	Define Execution Type	Create Target Group			
∋ Camp	Root Info Area	Relationship Type	Linked Info Area	Wher	e Field	Logical Operator	Condition Fields				
Cor	ase select desired root in mpany son ntact Person										

Now you can further define the follow-up marketing activity to the responses defined above.

9. To define a follow-up marketing activity, select the Define Follow-up Marketing Activity from the context menu for the "No Response" container. The New Follow-up Marketing Activity window displays.

	signer					
		Ą	Create Target Group u	sing Quick Query		
	A Create Target Group using Quick Query	Compose Query	Run Query	Finalize Query	Define Execution Type	Create Target Group
⊖ Camp		eate the target group, by c	licking the button	below.		

This window gives you the option to create a new follow-up marketing activity or use an existing one.

10.To create a new marketing activity or to reuse an existing one, perform the sub-steps described in step 5. In this case we add a follow-up marketing activity (Survey Reminder) to the No Response marketing activity.

	#a.	Create Target Group u	sing Quick Query		
create Target Group Ising Quick Query	Compose Query	Run Query	Finalize Query	Define Execution Type	Create Target Group
Target group cannot be created beca 1. Target group has already b				c	reate Target Group

11.Next we define the responses to the **Survey Reminder** follow-up marketing activity. Select **Define Responses** from the context menu. The **Responses (Survey Reminder)** window opens.

Campaign Designer							Q- :	Search
			° _q S	elect/Rework T	arget Group			□ ×
م Select/R Group	Rework Target			Select/Rewo	rk Target Group	Execution Definition		^
	rget Groups							and All 🛞 🗇 🕥
Sear	rch Marketing Activiti	es					© ^	
	Marketing Activity Add a	i value		+ ~	Level			
	Variant Add	value		+ ~	Resp. Rep ID		01	
	+ Add i	nore		~	With me			
Max.	5 👻 records per page						Start Search	
Sear	rch Results « < 1 - 5 Marketing Activity	of 5+ > >>	Marketing	Status		Campaign	Campaign	
	Confirmation		Internal_x	Scheduled		Spring Promotion Event 2016	Event	
	Event			Scheduled		Source Campaign	Event	
	Event			Scheduled		Spring Promotion Event 2016	Event	
	Follow-up			Scheduled		Spring Promotion Event 2016	Event	
	Invitation			Scheduled		Spring Promotion Event 2016	Event ≪ < 1 - 5 of 5+ > >>	
								-

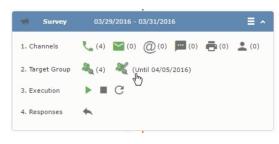
12.Select Finished and No Response options and click OK.

		₽ ₀ 5	elect/Rework Target Group		
ork Target			Select/Rework Target Group	Execution Definition	
Groups					
Marketing Activities					0. v
Results « < 1 - 5 of 11 >	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~				^
Marketing Activity		Marketing	Status	Campaign	Campaign
Confirmation		Internal_x	Scheduled	Spring Promotion Event 2016	Event
Event			Scheduled	Source Campaign	Event
Event			Scheduled	Spring Promotion Event 2016	Event
Follow-up			Scheduled	Spring Promotion Event 2016	Event
Invitation			Scheduled	Spring Promotion Event 2016	Event
					<< < 1 - 5 of 11 > >>
Group Entities					
Company	Person		Rep ID	Response Generated	Inact Executed
	Groups Marketing Activities Results « < 1 - 5 of 11 > Marketing Activity Confirmation Event Event Follow-up Invitation Group Entities	Sroups Marketing Activities Results « < 1 - 5 of 11 > >> Marketing Activity Confirmation Event Event Follow-up Invitation Group Entities	ork Target Groups Marketing Activities Results « < 1 - 5 of 11 > >> Marketing Activity Marketing Confirmation Internal_x Event Event Follow-up Invitation Group Entities	Stroups Marketing Activities Results 《 < 1 - 5 of 11 > >> Marketing Activity Marketing Status Confirmation Internal_x Scheduled Event Scheduled Follow-up Scheduled Invitation Scheduled	Select/Rework Target Group Execution Definition Stroups Stroups Marketing Activities Campaign Results « < 1 - 5 of 11 > » Marketing Activity Marketing Activity Marketing Status Campaign Confirmation Internal_x Scheduled Spring Promotion Event 2016 Event Scheduled Spring Promotion Event 2016 Follow-up Scheduled Spring Promotion Event 2016 Scheduled Spring Promotion Event 2016 Scheduled Scheduled Spring Promotion Event 2016

13.Next we want to send the survey reminder to those who have not responded. This loops the defined actions. To do this, select **Define Follow-up marketing activity** from the context menu of the **No Response** container.

	a Select/Rework Target Group
ام Select/Rework Target Group	Select/Rework Target Group Execution Definition
✓ Proceed *Edit target group until *Execution Type	04/05/2016 One-off, execute selection/query

14.Click Use Existing button.



Note: Since we want to send a survey reminder from the same campaign named "Questionnaire" we restrict the search content to the **Questionnaire** campaign. By changing the **Context** to **Entire Database** you can search for and add marketing activity from other Campaigns. To do that it is recommended that you use the **Re-use Marketing Activity** function described in step 5.

15.Click Start Search and select Survey Reminder from the search result.

		🖧 Edit Target Group		
Edit Target Group	Campaign Questionna Starts on 03/25/2016 Ends on 04/06/2016	Type Ques		tep ID get g 04/05/2016
Company Rep ID + Add mon Max. 15 • records per page	e	Last Name Inactive ? With me		Start Search
Search Results Set In	nactive 🗙 Delete 💄 Add Person 💄	Add Person in Company 🙎 Add Cor	ntact Person 🛛 🗮 Add Company	/ 🗸 🚺 🗸 🏟 Modify List Fields
S Company	Person	Rep ID	Response Generated	Inacti Executed
Zummatechi	Orlando Rizzi		\checkmark	
Zummatechi	Carlene Mcnary		\checkmark	
Zummatechi	John Smith		\checkmark	
u ∃ → Lamplanet	<u>Tonia Mertens</u>		×	

16.Next a confirmation follow-up marketing activity is added to the Finished Survey activity. To do this select Define Follow-up Marketing Activity from the Finished Survey context menu. To create a new marketing activity, perform the sub-steps described in step 5. In this case we add a new follow-up marketing activity (Confirmation) to the Finished Survey activity.

Campaign Designer			
		Campaign Calendar Campaign Designer	
		🛱 Define Execution Type	
	🛱 Define Executio	п Туре	
	V Proceed		
	*Edit target group until	04/05/2016	~
	*Execution Type	One-off, execute selection/query	^
		One-off, execute selection/query	
		One-off, do not execute selection	
		One-gff, only response processing	
		Repeated, always execute selection/query	
		Repeated, execute selection once Repeated, never execute selection	
		Repeated, only response processing	
		Repeated, packages	
		Repeated, extend selection/query	

Viewing a campaign

To view an existing campaign, perform the following:

1. Select Campaigns from the Marketing menu of CRM web.

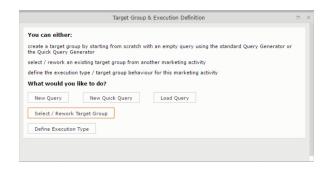
Campaign Designer / Campaign	
	Campaign Calendar Campaign Designer
ອ Campaign Questionnaire	
	Statistics
	Survey 03/29/2016 - 03/31/2016
	1. Channels 📞 (0) 🔛 (0) @ (a) 🔛 (0) 🖶 (0)
	2. Target Group 🦓 (0) 💐
	3. Execution 🕨 🔳 C
	4. Responses
Q.	Finished Survey (0) 🖓 No Response (0)

2. The Search Campaigns window opens. Enter the required criteria and click Search. The search results displays the list of campaigns.

Rq (0)

Notice that the campaigns list shows the status and type of the campaign.

3. Select a campaign and double click it to open it in the campaign designer.



Deleting a Campaign from designer

To delete a campaign from a campaign designer:

- 1. Open the campaign in a campaign designer.
- 2. Click the context menu from the campaign container.
- 3. Select the **Delete** option. The Question window pops up with the query "Do you really want to delete the selected record(s)?"
- 4. Click OK to confirm the deletion.

```
Note: Please note that this deletes the campaign along with all the activities in the campaign.
```

Viewing the Campaign Statistics

To view a campaign's statistics:

1. On the Campaign container, click to expand the container. The Statistics button is visible.



2. Click the **Statistics** button or select **Statistic**s from the campaign container context menu.



Note: The statistics shown in the Statistics window is calculated in the Edit Campaign window, as shown in the screenshot below.

*

Viewing a campaign

Learn how to view an existing campaign.

To view an existing campaign, perform the following:

1. Select Campaigns from the Marketing menu of CRM web.

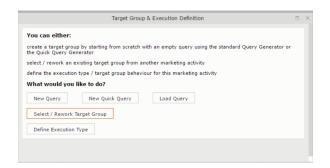
Campaign Designer / Campaign	
	Campaign Calendar Campaign Designer
· G Campaign Questionnaire	
	 Questionnaire Scheduled 03/25/2016 - 04/06/2016
	Statistics
	Survey 03/29/2016 - 03/31/2016
	1. Channels 📞 (0) 🔛 (0) @ (٩) 📼 (0) 📑 (0) 👤 (0)
	2. Target Group
	3. Execution
	4. Responses
	+
	Finished Survey (0) Response (0)

2. The **Search Campaigns** window opens. Enter the required criteria and click **Search**. The search results displays the list of campaigns.

A (0)

Notice that the campaigns list shows the status and type of the campaign.

3. Select a campaign and double click it to open it in the campaign designer.



Creating a new campaign from scratch

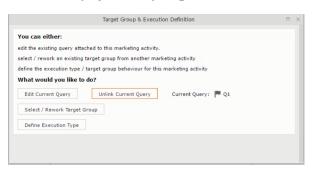
This topic guides you to create a new campaign from scratch.

To create a new campaign from scratch, perform the following steps:

1. Click the Marketing menu icon, and select **New Campaign** from the menu.

Current Query: 🏴 Q1

2. Click Empty Campaign.



3. Enter the following details in the New Campaign window:

Note: All fields that are in orange are mandatory fields.

- Name Enter a name for the campaign. (Mandatory field)
- Starts On Enter the start date of the campaign. (Mandatory field)
- **Type** Select the type of the campaign: Event; Questionnaire; or User Satisfaction. (Mandatory field)
- Target Group Size (Target) Enter the number of recipients expected to participate in the campaign.
- Ends On Enter the end date of the campaign.
- Status Select the status of the campaign. (Mandatory field)
- **Costs**: Enter the estimated cost of the campaign.
- Currency Enter the currency in which the campaign cost is estimated.
- **Resp.Rep** ID Enter the ID of the responsible rep for the campaign.

- **Budget approval required** Select the check box if an approval is required for the estimated budget of the campaign.
- Verification required Select the check box if a verification is required for the campaign.
- 4. Click Save. The Campaign Designer opens.

ing Standard Query New:Query Save ≥ Delete ≤ Send to Reps. ⇒> Run Query in Background ⇒> Run Query uery name [q1] equery er			🏴 New: Qu	ery *		
<pre>/ Save X Defail Send to Repu: Public guery Public Public guery Public guery Public guery Public guery Public Publi</pre>	reate Target Group sing Standard Query		Compose Query	Define Execution Type	Create Target Group	
<pre>uery name [q1]</pre>	New:Query *					^
udue Affiliations ? udue Aff	,	Reps 🔊 Run Query in Backg	round 🔊 Run Query			
<pre>vbdude Affiliations ? v UQL Syntax select (CoGrp, CoNo, PeGrp, PeNo, StatHo, SeqNo, IntAddr, JobTitle, Tell, Tell, Pax, TelMobile, 'E-mail', Priority, LeadStatus, Influence, E v Formatted / Add Info Area [x] Group AND [x] Group CB. Contact Peson Output Fidder: StatAo, PE, StatAo, PE, StatAo, PE, StatAo, CP, StarNo, CP, SarNo, Internal Address, Internal Name, Tel 1, Tel 2, Fax, Mobile Tal., E-mail, Priority, Lead Status, Buryog Contact Folder: StatAo, PE, StatAo, PE, StatAo, CP, StarNo, CP, SarNo, Internal Address, Internal Name, Tel 1, Tel 2, Fax, Mobile Tal., E-mail, Priority, Lead Status, Daving Contact Peson Output Fidder: StatAo, PE, StatAo, PE, StatAo, CP, StarNo, CP, SarNo, Internal Address, Internal Name, Tel 1, Tel 2, Fax, Mobile Tal., E-mail, Priority, Lead Status, Davy, Visit From, Visit Ton, Visit Dav, Tel, Long, Tel, Torn, Tel, to, StatA Cate Last Visit, End Date Last Visit, Start Date Last Visit, ForeQ (P, SarNo), Prefered Channel, Rep, Rep Group, Office Rep Office Rep Group, Company, Person, Finction, Tel, Kt, Fax Ett, FreelX, FreelX, FreeX, Fre</pre>	uery name Q1					
<pre>select (CoGrp, CoNo, PeGrp, PeNo, Statko, SeqNo, IntAddr, JobTitle, Tell, Tell, Fax, TelMobile, "E-mail', Priority, LeadStatus, Influence, D Formatted Add Info Are res Contact Person Output Fields: If_Statko, FL_SerNo, PE_StaNo, PE_SerNo, CP-StaNo, CP-SerNo, Internal Address, Internal Name, Tel 1, Tel 2, Fax, Mobile Tel, E-mail, Priority, LeadStatus, Buying Center Role, Department, Position, Rep ID, Rep Group ID, Office Rep Group ID, Label, Form of address (text), Gift, Ranking, Visit Frequency, Unit, Visit Day, Visit From, Visit To, Tel, Fra, Tel, Unit, Tel Day, Tel, form, Tel to, Start Date Last Visit, End Date Last Visit, Start Date Last Visit, FreeXJ, FreeXJ, FreeXJ, FreeZJ, F</pre>	clude Affiliations ?					query query
Formatted Add Info Area [x] Group AND [x] Group ON Contact Person Output Fields: F_Stalo, FL_Serio, PE_Stalo, CP-Stalo,	✓ UOL Syntax					
Output Fields FT, Statio, FT, Sertio, PE, Statio, PE, Sertio, CP-Starlio, CP-Starlio, Internal Address, Internal Name, Tel 1, Tel 2, Fax, Mobile Tel, E-mail, Prinrity, Lead Status, Buying Carter Ralo, Department, Reetion, Rep 10, Rep Group, 10, Office Rep Group, 10, Label, Form of address (text), Grift, Raning, Visit Frequency, Junit, Visit Day, Visit From, Visit To, Tel, Fra, Tel, Unit, Tel, Day, Tel, Ion, Tel, to, Start Date Last Visit, End Date Last Visit, Start Date Last Phone Call, End Date Last Phone Call, End Date Last Phone Call, End Date Last Visit, Start Date Last Phone Call, End Date Last Phone Call, End Date Last Visit, Start Date Last Visit, Fend Date Last Visit, Start Date Last Visit, Start Date Last Visit, Fend Date Last Visit, Start Date Last Visit, Freet2, Freet3, Freet3]x[Group OR				
	Output Fields: FI_StaNo, FI_S Buying Center Role, Departm Day, Visit From, Visit To, Tel. I from Marketing Activities, Exo Rep, Rep Group, Office Rep, (FreeD1, FreeD2, FreeD3, Free Googlet, Facebook, Inactive, (Person), CP-TenNo, Created on Station, Updated by ID, Up	ent, Position, Rep ID, Rep Group ira., Tel. Unit, Tel. Day, Tel. from, lude from Selections, Last Activit liffice Rep Group, Company, Pers Dec1, FreeDec2, FreeDec3, Freel Reason for exclusion, Active sim on, Updated on, Added on StNo.	ID, Office Rep ID, Office R Tel. to, Start Date Last V y, Satisfaction, Merge (FI on, Function, Tel. Ext., Fax 1, FreeL2, FreeL3, FreeL4 ce, Inactive since, Deactiv DelCd., CmCd., Created a	ep Group ID, Label, Form of sit, End Date Last Visit, Start StaNo), Merge (FI_SerNo), N Ext., FreeK1, FreeK2, FreeK , FreeL5, FreeL5, FreeL7, Fre ated by ID, Deactivated by, P, Updated at, Created by ID,	address (text), Gift, Ranking, V Date Last Phone Call, End Date derge (PE_StaNo), Merge (PE_S 3, FreeC1, FreeC2, FreeC3, Fre eL8, Free%1, Free%2, Free%3, eason for exclusion (Company Created in Module, (Created o	fisit Frequency, Unit, Visit Last Phone Call, Exclude SerNo), Preferred Channel, eN1, FreeN2, FreeN3, , LinkedIn, Xing, Twitter,), Reason for exclusion njinternal code, Updated

5. To add marketing activity to the campaign, click the context menu on the right of the campaign container. You can select an existing marketing activity or create a new marketing activity from scratch.

		P Query Q	21		□, ×
් _ය Create Target Group using Standard Query		Compose Query	Define Execution Type	Create Target Group	^
V Proceed					
*Edit target group until	04/05/2016				~
*Execution Type					^
	One-off, execute selection/query One-off, do not execute selection One-off, only response processing Repeated, always execute selection/ Repeated, execute selection once Repeated, never execute selection Repeated, only response processing Repeated, packages Repeated, extend selection/query	query			

- To use an existing marketing activity:
 - 1. From the context menu select **Reuse Marketing Activity**. The **Reuse Marketing Activity** window opens.
 - 2. Search for the marketing activities from a campaign and select it from the search list.
 - 3. Enter a New Start Date for the marketing activity, in the resulting window.

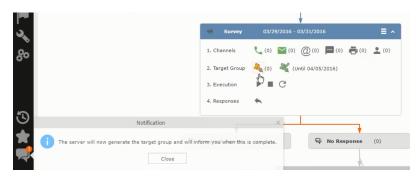
	Query Q1	□, ×
^ε α Create Target Group using Standard Query	Compose Query Define Execution Type	Ŷ
You can now attempt to create the target grou	p, by clicking the button below. Create Target C	roup
Create Target Group		

Note: If you do not provide a start date for the marketing activity then the start date on the reused marketing activity is used as start date.

4. Click OK. The marketing activity and its descendent marketing activities are added to the campaign designer.

	P Query	Q1	
[#] a Create Target Group using Standard Query	Compose Query	Define Execution Type	Create Target Group
Target group cannot be created because of the following reasons: 1. Execution Type has not been defined. 2. Edit target group unbil date has not been defined. Create Target Group	G.		

- 5. Next you can make further additions to the marketing activity.
- To create a new marketing activity:
 - 1. From the context menu select **New Marketing Activity**. The **New Marketing Activity** window opens.



- 2. Enter the following details for the new marketing activity:
 - Marketing activity Select the marketing activity type from the following: Confirmation, Event, Follow-up, Invitation, Survey, Survey-remainder. (Mandatory field)
 - Starts on The start date for the marketing activity.
 - Ends-on The end date for the marketing activity.
 - **Resp.Rep ID** The ID of the rep responsible for the marketing activity.
 - **Costs** The estimated cost of the marketing activity.

- Currency Select the currency the cost is estimated in.
- **Text** Provide a description and other relevant information in this text field.
- 3. Click **Save** to create the new marketing activity container in the campaign

	*
	Survey 03/29/2016 - 03/31/2016
	1. Channels ¹
er.	Kg Finished Survey (0) No Response (0)

Note: A blue arrow points from the campaign container to the marketing activity container.

- 4. In the next step you need to define some responses for this marketing activity.
- 6. The context menu for the marketing activity container allows you to perform the following: Define responses, Channel and Format definition; Target group and Execution definition; Edit Target group; Notify Rep; Edit/View Responses (Activities); Edit the marketing activity; Delete; Delete (including Generated Record).

In this case we define a response to the survey marketing activity, we have defined.

2

7. Select **Define Responses** from the context menu. A pop-up window is displayed.

		🔓 Edit Target Group)		•
Edit Target Group	Campaign Question Starts on 03/25/20 Ends on 04/06/20	16	Type Questionnaire Status Scheduled	Resp. Rep ID Edit target g 04/05/2016	^
Company Rep ID		94	Last Name		
+ Add n	nore	~	With me		
Max. 15 🗸 records per page				Start Search	
Search Results	et Inactive 🗙 Delete 💄 Add Person 🌡	Add Person in Compa	ny 💄 Add Contact Person	📱 Add Company 🗸 🚺 🖌 🏟 M	odify List Fields
Company	Person	Rep ID	Response	Generated Inacti	Executed
Zummatechi	Orlando Rizzi			~	
Zummatechi	Carlene Mcnary			\checkmark	
	<u>Carlene Mcnary</u> John Smith			V V	

Note: The list of available responses are defined in the catalog entries for marketing activities. If no entries are present you get the catalog entries window and you have to define the response catalog entries in that window.

8. Select the responses you want to define and click **OK**. The responses are added to the graph view under marketing activity container.

				🖧 Crea	ate Target Group usi	ng Quick Query		
	Reate Target Gr using Quick Que		Compose Query		Run Query	Finalize Query	Define Execution Type	Create Target Group
Camp	Root Info Area Please select desi ^ ase select desired root in	Relationship Type	Linked Info Area	where	Where Field	Logical Operator	Condition Fields	
Pers	npany son							

Now you can further define the follow-up marketing activity to the responses defined above.

9. To define a follow-up marketing activity, select the Define Follow-up Marketing Activity from the context menu for the "No Response" container. The New Follow-up Marketing Activity window displays.

		Ą	Create Target Group u	sing Quick Query		
	A Create Target Group using Quick Query	Compose Query	Run Query	Finalize Query	Define Execution Type	Create Target Grou
∋ Camp	You can now attempt to create Target Group	ate the target group, by o	licking the button	below.		

This window gives you the option to create a new follow-up marketing activity or use an existing one.

10.To create a new marketing activity or to reuse an existing one, perform the sub-steps described in step 5. In this case we add a follow-up marketing activity (Survey Reminder) to the No Response marketing activity.

# _,	Create Target Group usi	ng Quick Query		
Compose Query	Run Query	Finalize Query	Define Execution Type	Create Target Group
			C	reate Target Group
ause of the following reasons:				
been created.				
	Compose Query	Compose Query Run Query	ause of the following reasons:	Compose Query Run Query Finalize Query Define Execution Type ause of the following reasons:

11.Next we define the responses to the Survey Reminder follow-up marketing activity. Select Define Responses from the context menu. The Responses (Survey Reminder) window opens.

											_
					₽ _a s	elect/Rework Tar	get Group				<
	lect/Rev oup	vork Target				Select/Rework	: Target Group	Execution Definition		^	
Camp	✓ Target	Groups								-	and All 🛞 🕞
	Search	Marketing Act	ivities						o ~		
		Marketing Activity	Add a value			+ ~	Level				
		Variant	Add a value			+ ~	Resp. Rep ID		2		
		+	Add more			~	With me				
	Max. 5	 records per page 							Start Search		
	Search	Results « ‹	1 - 5 of 5+ > >>						~		
	1	Marketing Activity	(ß	Marketing	Status		Campaign	Campaign		
		Confirmation			Internal_x	Scheduled		Spring Promotion Event 2016	Event		
		Event				Scheduled		Source Campaign	Event		
		Event				Scheduled		Spring Promotion Event 2016	Event		
		Follow-up				Scheduled		Spring Promotion Event 2016	Event		
		Invitation				Scheduled		Spring Promotion Event 2016	Event << < 1 - 5 of 5+ > >		
									11 1 1 0 01 D + V /		

12.Select Finished and No Response options and click OK.

			₽ ₀ 5	elect/Rework Target Group		1
lect/Rew oup	vork Target			Select/Rework Target Group	Execution Definition	
✓ Target	Groups					
Search	Marketing Activities					÷ •
Search	Results « < 1 - 5 of 11 3	> >>				^
				Chebus	Campaign	Campaign
<u>_</u>	Marketing Activity		Marketing	Status	campaign	campaign
<u>/</u>	Marketing Activity Confirmation		Internal_x		Spring Promotion Event 2016	Event
	Confirmation		-			
	Confirmation		-	Scheduled	Spring Promotion Event 2016	Event
	Confirmation Event		-	Scheduled Scheduled	Spring Promotion Event 2016 Source Campaign	Event Event
	Confirmation • Event Event		-	Scheduled Scheduled Scheduled	Spring Promotion Event 2016 Source Campaign Spring Promotion Event 2016	Event Event Event
	Confirmation Event Event Follow-up		-	Scheduled Scheduled Scheduled Scheduled	Spring Promotion Event 2016 Source Campaign Spring Promotion Event 2016 Spring Promotion Event 2016	Event Event Event Event
₽≡∨	Confirmation Event Event Follow-up		-	Scheduled Scheduled Scheduled Scheduled	Spring Promotion Event 2016 Source Campaign Spring Promotion Event 2016 Spring Promotion Event 2016	Event Event Event Event Event
旧日、	Confirmation Event Event Follow-up Invitation		-	Scheduled Scheduled Scheduled Scheduled	Spring Promotion Event 2016 Source Campaign Spring Promotion Event 2016 Spring Promotion Event 2016	Event Event Event Event Event

13.Next we want to send the survey reminder to those who have not responded. This loops the defined actions. To do this, select **Define Follow-up marketing activity** from the context menu of the **No Response** container.

		Select/Rework Target Group	
ಕ್ಷಿ Select/Rework Target Group		Select/Rework Target Group	Execution Definition
✓ Proceed			
*Edit target group until			
*Execution Type	One-off, execute selection/query		

14.Click Use Existing button.



Note: Since we want to send a survey reminder from the same campaign named "Questionnaire" we restrict the search content to the **Questionnaire** campaign. By changing the **Context** to **Entire Database** you can search for and add marketing activity from other Campaigns. To do that it is recommended that you use the **Re-use Marketing Activity** function described in step 5.

15.Click Start Search and select Survey Reminder from the search result.

		🗞 Edit Tarç	get Group		
Edit Target Group		ampaign Questionnaire Starts on 03/25/2016 Ends on 04/06/2016	Type Questionnaire Status In Progress	Resp. Rep ID Edit target g 04/05/2016	
Company Rep ID + Ar Max. 15 • records per page	dd more	<u>8</u> *	Last Name Inactive ? With me	Start Search	
Search Results Company Zummatechi Zummatechi Zummatechi EIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	Set Inactive X Delete Person Orlando Carlene John Sm	Rep ID Rizzi Mcnary ith	in Company 🙎 Add Contact Person Response	Add Company ♥ 図 ♥ ☆ Mou Generated Inacti ♥ ♥ ♥	

16.Next a confirmation follow-up marketing activity is added to the Finished Survey activity. To do this select Define Follow-up Marketing Activity from the Finished Survey context menu. To create a new marketing activity, perform the sub-steps described in step 5. In this case we add a new follow-up marketing activity (Confirmation) to the Finished Survey activity.

Campaign Designer					
			Campaign Calendar	Campaign Designer	
			🛱 Define Execut	ion Type	
	Define Execution	n Type			
	V Proceed				
	*Edit target group until	04/05/2016			~
	*Execution Type	One-off, execute sel	ection/query		^
		One-off, execute sel	ection/query		
		One-off, do not exec			
		One-off, only respon			
		Repeated, always es Repeated, execute s	ecute selection/query		
		Repeated, never exe			
		Repeated, only resp	onse processing		
		Repeated, packages			
		Repeated, extend se	election/query		

Deleting a Campaign from designer

Learn to delete a campaign from designer.

To delete a campaign from a campaign designer:

- 1. Open the campaign in a campaign designer.
- 2. Click the context menu from the campaign container.
- 3. Select the **Delete** option. The Question window pops up with the query "Do you really want to delete the selected record(s)?"
- 4. Click OK to confirm the deletion.

Note: Please note that this deletes the campaign along with all the activities in the campaign.

Viewing the Campaign Statistics

Learn to view campaign statistics.

To view a campaign's statistics:

1. On the Campaign container, click to expand the container. The Statistics button is visible.

03/29/2016 - 03/31/2016	≡ ^
(4) (0) (0) (0) (0) (0) (0)	. (0)
🍇 (4) 🛛 🦧 (Until 03/29/2016)	
▶ (03/29/2016) ■ C	
*	
	 (4) (0) (0) (0) (0) (0) (0) (4) (0) (0) (0) (0) (4) (0) (0) (0) (0)

 Click the Statistics button or select Statistics from the campaign container context menu.

2

Note: The statistics shown in the Statistics window is calculated in the Edit Campaign window, as shown in the screenshot below.

*

Working with Marketing Activities

Learn to work with marketing activities.

Creating a marketing activity involves the following steps:

- 1. Creating channels and formats used in a marketing activity.
- 2. Adding the target groups to the marketing activity, see page 606.
- 3. Defining the execution definition, see page 606.
- 4. Executing a marketing activity, see Executing a Marketing Activity
- 5. Editing and viewing responses to a marketing activity, see Editing/Viewing the Responses for a Marketing Activity

Defining Channels and Formats used in a Marketing Activity

To define the channels and formats for a marketing activity, perform the following steps:

- 1. Open the required campaign in the campaign designer.
- 2. On the marketing activity container, click **OK** to expand the container.

	Question	>
?	Are you sure you want to start the execution of this marketing activity? The preconditions for starting the execution of this campaign step will be checked and if satisfied the execution will start.	
	OK Cancel	

The following screenshot shows the **Survey** marketing activity container.

		📢 Edit/V	/iew Responses (Activitie	es)	c
Edit/Vie	w Responses (A	ctivities)			¢ ~
	Company				
	Last Name			First Name	
	+ Add n	nore	~	With me	
lax. 15	 records per page 				Start Search
earch	Results Type	Company	Person		🚺 🗸 🛱 Response 1 (Marketing Act.)
	Telephone	<u>Zummatechi</u>	Orlando	o Rizzi	
	Telephone	Zummatechi	Carlene	Monary	
	Telephone	Zummatechi	John Sr	mith	
	Telephone	Lamplanet	Tonia M	lertens	

The following is a brief description of the components of a marketing activity:

Channels - The first row shows the available channels of communication for a marketing activity. The following channels are available:

• Phone

	Last Name + Add more		~	First Name	
Max. 15	 records per page 				Start Search
Search	Results				K I ~ ¢
1	Туре	Company		Person	Response 1 (Marketing Act.)
√ ⊘	Telephone	Zummatechi		<u>Orlando Rizzi</u>	Add 5 more + 🗸
	Telephone	Zummatechi		Carlene Mcnary	
	Telephone	Zummatechi		John Smith	
	Telephone	Lamplanet		Tonia Mertens	

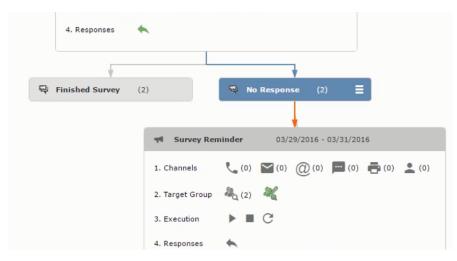
• Letter

.ait/VI	iew Responses (Activit	ies)			÷ -
	Company				
	Last Name			First Name	
	+ Add more .	•	~	With me	
lax. 15	✓ records per page				Start Search
earch	h Results				
1	Туре	Company		Person	Response 1 (Marketing Act.)
	Telephone	Zummatechi		Orlando Rizzi	Finished Survey
	Telephone	Zummatechi		Carlene Mcnary	No Response
	Telephone	<u>Zummatechi</u>		<u>John Smith</u>	Finished Survey + ^
	Telephone	Lamplanet		Tonia Mertens	
					Response

• Email

	*
M Survey	03/29/2016 - 03/31/2016
1. Channels	📞 (4) 🔛 (0) @(0) 📕 (0) 🖷 (0) 👱 (0)
2. Target Group	🦓 (4) 🛛 🥰 (Until 03/29/2016)
3. Execution	▶ (03/29/2016) ■ C
4. Responses	*
•	*
💀 Finished Survey	(2) 🗮 🖓 No Response (2)
	(m)
	Survey Reminder 03/29/2016 - 03/31/2016

• SMS



• Fax

	¥
rt Survey	03/29/2016 - 03/31/2016
1. Channels	🐛 (4) 🔛 (0) 🔘 (0) 💻 (0) 📥 (0) 🔔 (0)
2. Target Group	ዲ (4) 🛛 🦧 (Until 03/29/2016)
3. Execution	▶ (03/29/2016) ■ C
4. Responses	*
R Finished Survey	(2)
	<u>ر الم</u>
	Survey Reminder 03/29/2016 - 03/31/2016

In-person

	² a	Edit Target Group		□, ×
Edit Target Group	Campaign Questionnaire Starts on 03/25/2016 Ends on 04/06/2016	Type Ques Status In Pr		
Company Rep ID + Add more Max. 15 • records per page	4 4 1			Start Search
	Delete 💄 Add Person 💄 Add erson	l Person in Company 💄 Add Cor Rep ID	ntact Person 🛱 Add Company Response Generated	✓ X ✓ A Modify List Fields Inacti Executed
	onia Mertens arlene Mcnary	Super User Super User	No Response No Response	

The numbers in brackets besides each channel represents the number of target group entities that is processed using this channel.

Target Group – In this step you can define the target groups (customers etc) who are to be the participants of this marketing activity.

Execution – In this step, you can execute and start the marketing activity.

Responses – After the execution of the marketing you can evaluate the responses from participants.

3. Click on any of the channel icons to open the **Channel & Format Definition** window.



The channel and format definition process contains three phases: **Define Channel(s)** > **Define Format** > **Define Default Values**. The window opens on the **Define Channel(s)** phase.

- **Define Channels** In this phase you can select the channels that are used to approach the customers for the marketing activities.
- **Define Format** In this phase you can define the formats to be used for each of the channels you selected in the first phase. For example a template document for an email or fax, the fields that are used in the generation of a letter and similar formats for each of the required channels. The fields you want to include from different CRM info areas in the templates.
- **Define Default values** You can define the default values for the marketing activities that are generated.
- 4. Provide the following information in the **Define Channel(s)** phase:

Format Definition

- Format Name You can give a name to the format definition or retain the automatically generated name. This field is mandatory.
- Lock Select this check box to lock the message format for the marketing activity.
- **Private** Select this check box to keep the message generated for the marketing activity private.

Preferred Channels

• Fixed – You can select one fixed channel.

Note: You cannot select variable channel, if you select a fixed channel.

- **Variable (Priority)** You can select multiple channels with variable priorities for the channels.
- **Generate** This selection generates activities for all entities to represent the successful generation during the marketing activity execution. This is selected by default and cannot be changed.

Save Channel(s) – Click this button to save the Channel format details you configured on this page.

Load Format – Click this button to open the Channel Formats search window. Select the required format previously created, from the search result and load it. You can then edit the format as required.

Proceed – Click this button to go to the next step, **Define Format**.

Note: If you have not saved the channel definition, you are prompted to save the channel configuration details before proceeding.

5. Click Save Channel(s). Click Proceed to open the Define Format window.

C

The Define Format window opens with tabs for each of the channel you selected. You can define the information required for the message formats required for the selected channels by clicking each of the tabs.

Note: The Phone and In-Person channels do not require and further configuration information. The remaining channels Letter, Email, SMS, and Fax require further configuration information you can define in this window. The fields that are in Orange are mandatory fields. If you do not fill the mandatory fields then you can still save the channel format but you cannot execute the channel definition.

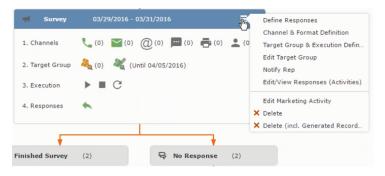
If you do not fill in a mandatory field and save the channel format, then if you go back to the Campaign designer you can see that the channels you selected is not green in color. See the screenshot below. The phone channel is in green color, but the Letter and Email channels are in grey.

	Question	×
?	Are you sure you want to reset the execution of this marketing activity?	
	The target group entities marked as "Generated" will be deleted, and the target group will be generated based on the selection/query attached to this marketing activity (if any). However, the target group entities marked as non Generated will be retained. The "Executed" flag of the target group entities will remain on the same state for all the current target group entities.	5
	OK Cancel	

 Click on the Letter icon and it directly opens the Letter tab in the Define Format process step. Enter the format details of the channels including all the mandatory steps.



7. After providing the required information, click **Save Default Values**. Then click **Proceed** to move to the **Define Default Values** phase.



You provide a **Default Values Name** or use the automatically generated one. You can also search for and load a previously saved default values by using the **Load Default Values** button.

8. After entering the default values, click **Save Default Values** and then click **Proceed** to return to the campaign designer window.

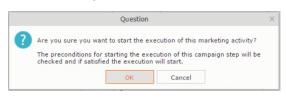
Notify about record	
You can send this record to any other rep and/or external recipient. Please specify what you want to send: Recipients: Additional internal recipients:	92
Additional external recipients:	
Subject: Survey (In Progress) 03/29/2016	
Body:	
☑ Insert Aurea CRM web link	
Request a delivery receipt	
Send	incel

Notice that the Phone and Letter channels icons are now in green.

Adding the Target Group and Execution Definition

To define the channels and formats for a marketing activity, perform the following steps:

- 1. Open the required campaign in the campaign designer.
- 2. On the marketing activity container:
 - Click to expand the container.



• Click the target group icon to open the Target Group.

◄ Campaign: Questionnaire; Marketing Activity: Survey	
🛃 Edit 🗸 Save 🖉 Cancel 🗮 Calculate 🖳 🖾 🖏	
Marketing Activity Survey	
Starts on 03/29/2016 Ends on 03/31/2016 Target group size (Target)	
Resp. Rep ID Super User Costs Planned	
Text	

and **Execution Definition** window.

🖉 Edit 🖌 Save 🖉	Questionnaire; Mar		Survey				
*Marketing Activity	Survey						+ ~
*Starts on	03/29/2016	~	*Ends on	03/31/2016	~	Target group size	
Resp. Rep ID	Super User	91	Costs	R		(Target)	
			Currency		+ ~		
Text							

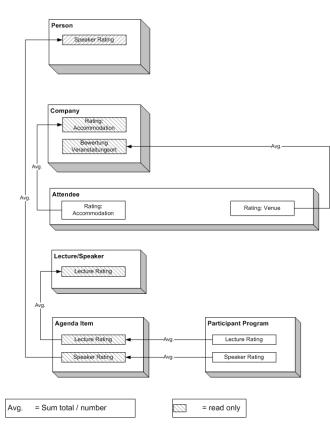
You can create the target group and define execution type using the following buttons:

- New Query Use this to create a target group using the Standard Query process.
- New Quick Query Use this to create a target group using the Quick Query process.
- Load Query Use this to search for and load a query that is already created and saved.
- Select/Rework Target Group Use this to select a different target group or modify the target group.
- Define Execution Type This allows you to define the dates until which the queries are executed to update the target group. You can also define the execution types.

If you were to start creating the target group, but stop in between and reopen this window it also shows the current query you were working on. It now have options to edit or unlink the current query from the marketing activity. For example:

New: Equipment								
🗸 Save								
Equipment	Beamer	+ ~						
Description								
Casta			0	+ ~				
Costs			Currency	+ *				
Quantity	1		Equipment Unit	+ ~				

the above screenshot shows the current query that was being worked on to create the target group. The flag icon indicates that the current query is a standard type query.



- 3. To create the target groups and define the execution type, perform one of the following:
 - Using the New Query button:
 - 1. Click New Query to open the standard New: Query window.
 - Enter the Query Name and the UQL syntax for the query and run the query to get a list of entities for the target group. These are added to the target group.

Note: Instead of using an UQL, you can specify the infoarea, the fields to search, and the conditions by using the buttons in the Formatted and Conditions sections.

- 3. Click **Save** to proceed to the next step, **Define Execution Type** window. In this window you can specify the following information:
 - Edit target group until Specify the date until the target group can be updated based on the result of the query.
 - Execution Type Select the execution type from the drop-down list.
- 4. Click to open the **Create Target Group** step window.

55 - Shipment cannot be delivered	I Ticket 55 - B2 - Shipment cannot be delivered							
55 B - Shipment cannot be delivered 55 - B2 - Shipment cannot be delivered 55 C - Shipment cannot be delivered	Edit	Save 🖉 Cancel	Hierarchy Tree	📱 Dispatching Dashboard 🖳				
723 - Two items in shipment damaged	End Customer Kr	ist Intl. OY	Contact Comp	Krist Intl. OY				
	End Customer M	. Jonne Aaron	Contact Person	Mr. Jonne Aaron				
	Subject St	nipment cannot be delivere	ed No.	55 - B2				
	Priority		Status	🔞 Open				
	Service Level		Туре					
	Problem Group		Problem					
	Item No.		Item Name					
	Link		Predecessor	55 B - Shipment cannot be delivered				

If any of the items in the previous two steps are incomplete, you get warning messages. For example, if you had not defined the execution type and edit target group until date fields in the Define Execution Type window then Create Target Group window displays the incomplete steps as shown below. Also notice that the Create Target Group tab at the top has a red dot in it instead of a green dot.

- 5. Click **Create Target Group** to complete the creation of the target group process. A notification window along with some progress indicators are created as shown in the screenshot below.

The Target Group icon is now orange in color to indicate that the target group creation is in progress. Also the Target Group row now has date until which the target group list can be updated. Once the target group is processed then the channels and target group icons has the target group numbers in the brackets besides the respective icons.

Once the server creates the target group and updates the marketing activity is to be executed on the date specified. The icons is displayed in green. See the screenshot below.

se.	arci						of 24		<i></i>		- 10		_									-	¥ ~	
				Prio Medi			Subje		Status Open	Created on 19.04.2013	End Co Gabrie		er C	0	Monito					r Parke	- 1	ID		
.E	=			Medi			Probl		Open	05.03.2014		_			Mainter		_		-	iko Kar				
	=	•	.23	meai	um		Probi	em	Open	05.05.2014	<u>SunTea</u>	1			Maintei	nanco	=		Kazı				of 24 🕽	> >>
24	.04	- 2	6.0	4.20)14	ſ	New	Activ	ity				(Э (•	is d
		-					>		Reps		The	J 24.0					5.04	201		6-4	26	04.7	2014	-
< W	Mon	Tue		2014		Sat	Sun	-	ĸeps			08 12					12					12		
14	31	1	2	3	4		6		Chris Aki			1 12		20			12					12		
5	7	8	9	10	11	12	13		Dominik L	andertinger					1					٩				
6	14	15	16	17	18	19	20		John Doe	-				٩						_				
7	21	22	23	24	25	26	27		Kazuko K	anzaki				_										
8	28	29	30	1	2	3	4		Simon Ed	er				٩	1									
19	5						11		Stephen	Smith				_	1									
Tick	up re et-re	eps b elater	y No d rep	13 M o grou o ults			× ₩ × ₩	4																
				ephor	ne		~	ſ								5								
		ject tion																						
	Juld	uon																						

6. To edit the target group click . The Edit Target Group window opens. You can use the search queries to add more recipients to the target group.

Note: The target group icon turns Red (⁴⁴) after the "Until" date.

- To create the target groups and define the execution type using the New Quick Query option, perform one of the following:
 - Click the New Quick Query button from the Target Group & Execution Definition window. The Create Target Group using Quick Query window is opened.

👒 CRM.launcher	×							
Aurea								
crm.web is requesting permission for the following services:								
- MailMerge								
 DocumentEdit AppLauncher 								
Appearicher								
Deny	ОК							

- 2. Select the Root Info Area from the dropdown list.
- 3. Click Run Query. The query results are listed. Click Finalize Query.
- 4. Define if the query results are Private Query or Public Query. Enter a name in **Save As ...** field.
- 5. Click Save to finalize the results and attach the query results to this marketing activity. The Create Target Group window opens.

Campaign De	Campaign Designer												
_	A Create Target Group using Quick Query												
	ಕ್ಷಿ Create Target Group using Quick Query	Compose Query	Run Query	Finalize Query	Define Execution Type	Create Target Group							
⊜ Camp	You can now attempt to creat Create Target Group	e the target group, by c	licking the button I	below.									

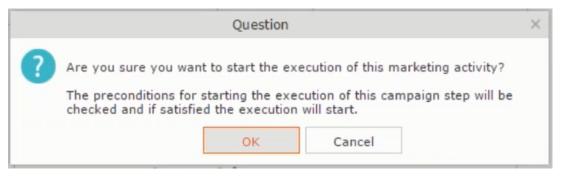
If any of the intermediate process steps are incomplete, you get a warning message, including if the target group is already created. A sample screenshot is provided below:

	a a	Create Target Group us	ng Quick Query		
R Create Target Group	Compose Query	Run Query	Finalize Query	Define Execution Type	Create Target Group
Using Quick Query Target group cannot be created because 1. Target group has already been Create Target Group	-			Cr	eate Target Group

6. Click Create Target Group to complete creating the target group.

Selecting or modifying the target group

- 1. Open the required campaign in the campaign designer.
- 2. On the marketing activity container:
 - Click OK to expand the container.



• Click the target group icon to open the Target Group

	📢 Campaign: Questionnaire; Marketing Activit	:y: Survey	D, X
◄ Campaign: Questionnaire; Marketing	Activity: Survey		
🛃 Edit 🗸 Save ⊘ Cancel 🗐 Calculate 🖳 🕅			
Marketing Activity Survey			
Starts on 23/29/2016	Ends on 03/31/2016	Target group size (Target)	
Resp. Rep ID Super User	Costs Planned		
Text			

• and Execution Definition window.

	Questionnaire; Marketing Cancel 🖩 Calculate 🖳 🖉		Survey				
*Marketing Activity	Survey						+ ~
*Starts on	03/29/2016	~	*Ends on	03/31/2016	~		
Resp. Rep ID	Super User	9	Costs		\mathbb{R}	(Target)	
			Currency		+ ~		
Text							

3. Click Select/Rework Target Group. The Select/Rework Target Group window displays.

					₿ s	elect/Rework Ta	rget Group			o x	
		vork Target			-	Select/Rework	k Target Group	Execution Definition		^	
amp	✓ Target	Groups								and All	• •
	Search	Marketing Ac	tivities						0	^	
		Marketing Activity	Add a value			+ ~	Level				
		Variant	Add a value			+ ~	Resp. Rep ID		91		
		+	Add more			~	With me				
	Max. 5	 records per page 	3						Start Search		
	Search	Results « «	1 - 5 of 5+ > >>							~	
	1	Marketing Activit	У	2	Marketing	Status		Campaign	Campaig	n	
		Confirmation			Internal_x	Scheduled		Spring Promotion Event 2016	Event		
		Event				Scheduled		Source Campaign	Event		
		Event				Scheduled		Spring Promotion Event 2016	Event		
		Follow-up				Scheduled		Spring Promotion Event 2016	Event		
		Invitation				Scheduled		Spring Promotion Event 2016	Event << < 1 - 5 of 5+ >		

4. You can search for marketing activities and select the desired marketing activity. The target group entities for the selected marketing activity are listed below.

			₽ _q s	elect/Rework Target Group		
ect/Re oup	ework Target			Select/Rework Target Group	Execution Definition	
✓ Targe	et Groups					1
Searc	h Marketing Activities	i				© •
Searc	h Results 《 < 1 - 5 of	11 > >>				^
1	Marketing Activity		Marketing	Status	Campaign	Campaign
	Confirmation		Internal_x	Scheduled	Spring Promotion Event 2016	Event
e =	✓ Event			Scheduled	Source Campaign	Event
	Event			Scheduled	Spring Promotion Event 2016	Event
	Follow-up			Scheduled	Spring Promotion Event 2016	Event
	Invitation			Scheduled	Spring Promotion Event 2016	Event
						<< < 1 - 5 of 11 > >>
✓ Targe	et Group Entities					
ſ	Company	Person		Rep ID	Response Generated	Inact Executed
-	Lamplanet	Tonia Mertens		Super User		

5. Double click on the marketing activity to add the target group from the selected marketing activity to the target group of the current marketing activity. The Execution Definition window displays.

	a Select/Rework Target Group
್ಡಿ Select/Rework Target Group	Select/Rework Target Group Execution Definition
Proceed *Edit target group until *Execution Type	4/05/2016 Dine-Off, execute selection/query

- 6. Specify the following information:
 - Edit target group until Specify the date until the target group can be updated.
 - Execution Type Select the execution type from the drop-down list.

7. Click Proceed. The campaign designer window opens.



8. Click **I** to view the newly added participant to the target group.

		🗞 Edit Target (Group		
Edit Target Group	Campaign Que: Starts on 03/2 Ends on 04/0	5/2016	Type Questionnaire Status In Progress	Resp. Rep ID Edit target g 04/05/2016	
Company Rep ID + Add Max. 15 • records per page	more	<u>*</u>	Last Name Inactive ? With me	Start Search	
	Person <u>Orlando Rizzi</u> <u>Carlene Mcnary</u> John Smith	n 💄 Add Person in Cr Rep ID	ompany 🚊 Add Contact Person 🚆 Response	Add Company v 🖾 v 🏟 Modify List Fit Generated Inacti Executed V V	lds
Lamplanet	<u>Tonia Mertens</u> ₩				

Defining Execution Type

To define an execution type, perform the following:

- 1. Open the required campaign in the campaign designer.
- 2. On the marketing activity container:
 - Click OK to expand the container.

	Question	×
?	Are you sure you want to start the execution of this marketing activity? The preconditions for starting the execution of this campaign step will be checked and if satisfied the execution will start.	
	OK Cancel	

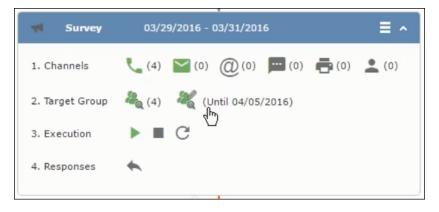
• Click the target group icon to open the Target Group

	📢 Campaign: Questionnaire; Marketing Activity	v: Survey	□. ×
🛪 Campaign: Questionnaire; Marketir	ng Activity: Survey		
🖋 Edit 🖌 Save ⊘ Cancel 🛛 🖩 Calculate 🛛 🖳			
Marketing Activity Survey			
Starts on \$3/29/2016	Ends on 03/31/2016	Target group size (Target)	
Resp. Rep ID Super User	Costs Planned		
Text			

• and Execution Definition window.

✓ Campaign: Questionnaire; Marketing Activity: Survey <i>E</i> Edit ✓ Save ⊘ Cancel □ □ Calculate □ □ □ Calculate □ □ □								
*Marketing Activity	Survey							+ ~
*Starts on	03/29/2016	~	*Ends on	03/31/2016		~	Target group size	
Resp. Rep ID	Super User	91	Costs		\square		(Target)	
			Currency			+ ~		
Text								

- 3. Specify the following information:
 - Edit target group until Specify the date until the target group can be updated.
 - Execution Type Select the execution type from the drop-down list.
- 4. Click Proceed. The campaign designer window opens.



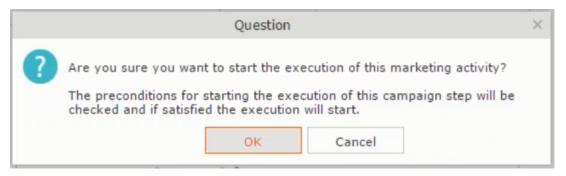
Executing a Marketing Activity

To execute a marketing activity, the following conditions should be met:

- All the selected channels and their formats should be defined. The selected channel icons would be green in color.
- The target groups should be defined. The Target group icons would be green in color.
- The current date should be within the scope of the start and end dates of the campaign.
- The "Edit target group until date" has to be defined. This date is visible besides the edit target group icon (().

To execute a marketing activity, perform the following steps:

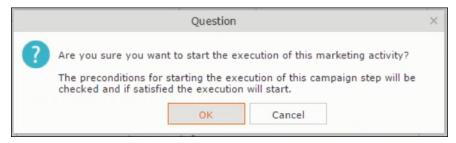
- 1. Open the required campaign in the campaign designer.
- 2. On the marketing activity container:
 - Click OK to expand the container.



The following screenshot shows the Survey marketing activity container.

		dit/Viev	w Responses (Activities)	E
Edit/Vie	ew Responses (Activities	5)		¢ ^
	Company			
	Last Name		First Name	
	+ Add more		✓ With me	
ax. 15	✓ records per page			Start Search
earch	Results			10 - 10
(m) ~	Туре	Company	Person	Response 1 (Marketing Act.)
	 Telephone 	<u>Zummatechi</u>	<u>Orlando Rizzi</u>	
	Telephone	Zummatechi	Carlene Mcnary	
	Telephone	Zummatechi	John Smith	
	Telephone	Lamplanet	Tonia Mertens	

3. Click the ► button on the **Execution** row. A query window pops up asking you to confirm the operation.



4. Click **OK**. A server notification informs you that the marketing activity has started and informs you when it is completed.

03/29/2016 - 03/31/2016	≡ ^
(4) (0) (0) (0) (0) (0)	(0)
🍇 (4) 🛛 🦧 (Until 03/29/2016)	
▶ (03/29/2016) ■ C	
*	
	 (4) ≤ (0) @ (0) = (0) = (0) (4) (Until 03/29/2016)

The Execute button is now greyed and the date on which the execution starts automatically is displayed in brackets besides it.

Note: The edit target group icon is now in red ($\overset{\&}{}$). The abort button is greyed out once the execution starts. And reset button is now activated. The Responses button remains grey until the all the participants have responded.

Editing/Viewing the Responses for a Marketing Activity

To edit or view the responses for a marketing activity, perform the following steps:

1. Click icon in the responses row. The Edit/View Response (Activities) window opens.

		r Edit,	/View Responses (Activities)		□ , ×
1	Edit/View Responses	(Activities)			÷ ^
	Company				
	Last Name		First	Name	
	+ A0	dd more	✓ W	ith me	
	Max. 15 🗸 records per page	e			Start Search
	Search Results				(I) ~ (C)
	(Type	Company	Person	Response	1 (Marketing Act.)
	📑 🗮 🗸 Telephone	Zummatechi	<u>Orlando Rizzi</u>		
	Telephone	Zummatechi	Carlene Mcnai	Y	
	Telephone	Zummatechi	John Smith		
	Telephone	Lamplanet	Tonia Mertens		

You can search for specific participants and view/edit their responses.

2. Select a row and click on Response 1 (Marketing Act.) column to activate and record the response.

		redit/Vie	ew Responses (Ad	tivities)		
Edit/Vi	ew Responses (Activiti	es)				0 ^
	Company					
	Last Name			First Name		
	+ Add more		~	With me		
lax. 15	 records per page 					Start Search
earch	n Results					Ø - Ø
ø	Туре	Company	P	erson	Response 1 (Mark	(eting Act.)
~0	Telephone	<u>Zummatechi</u>		rlando Rizzi	Add 5 more	+ ~1
	Telephone	Zummatechi	<u>c</u>	arlene Mcnary		
	Telephone	Zummatechi	<u>]</u>	hn Smith		
	Telephone	Lamplanet	D	onia Mertens		

3. Click the drop-down list to select the response type. Click on the + button to add more response types to the response catalogue entries.

		Edit/VI	ew Responses (Activities)	
dit/V	iew Responses (Activ	/ities)		\$ ^
	Company			
	Last Name		First Name	
	+ Add more		✓ With me	
ax. 15	✓ records per page			Start Search
earc	h Results			XI ~ Ø
1	Туре	Company	Person	Response 1 (Marketing Act.)
	Telephone	Zummatechi	Orlando Rizzi	Finished Survey
	Telephone	Zummatechi	Carlene Mcnary	No Response
	Telephone	<u>Zummatechi</u>	<u>John Smith</u>	Finished Survey + ^
	Telephone	Lamplanet	Tonia Mertens	
				Response

Edit the responses for all the participants.

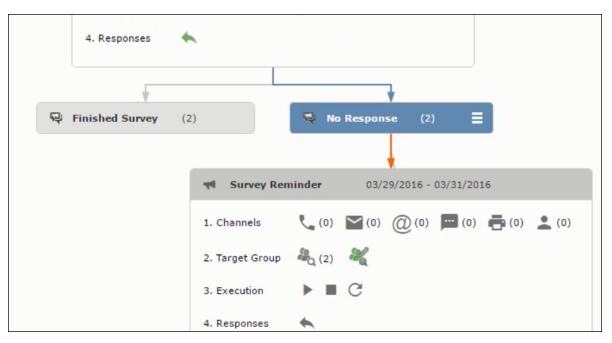
4. Close the window to come back to the campaign manager window. The response icon is be green in color. This shows that response for all the participants is recorded.

	*
Survey	03/29/2016 - 03/31/2016
1. Channels	📞 (4) 🔛 (0) @(0) 📼 (0) 🚔 (0) 👤 (0)
2. Target Group	🦓 (4) 🛛 l (Until 03/29/2016)
3. Execution	▶ (03/29/2016) ■ C
4. Responses	*
•	
Finished Survey	(2) 🗮 🖳 No Response (2)
	Survey Reminder 03/29/2016 - 03/31/20
	T T

Notice the "(2)" in the response containers for the Survey marketing activity: **Finished Survey** and **No Response** show. This indicates that two participants completed the survey and two members did not respond.

5. Click the button to expand the **Survey Reminder** follow-up marketing activity container for those participants who did not respond to the Survey.

	Question	×
?	Are you sure you want to start the execution of this marketing activity? The preconditions for starting the execution of this campaign step will be checked and if satisfied the execution will start.	



You can see that two participants who did not respond are already added to the target group of the follow-up marketing activity.

6. Click to open the Edit Target Group window for the Survey Reminder follow-up marketing activity.

	² a E	Edit Target Group		= ;;
Edit Target Group	Campaign Questionnaire Starts on 03/25/2016 Ends on 04/06/2016	Type Ques Status In Pr		^
Company Rep ID + Add more	<u>8</u>	Last Name Inactive ? With me		
Max. 15 records per page	Colore & Add Damas & Add	Barras in Company	Start Search	terre alle a state state
		Rep ID		cti Executed
Lamplanet T	onia Mertens	Super User	No Response	
Zummatechi C	arlene Mcnary	Super User	No Response	

You can see that the two members with "No Response" in the **Response** column are listed.

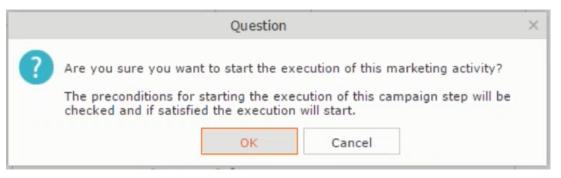
Resetting the Marketing Activity Execution

Restarting a marketing activity is possible if the marketing activity execution is completed. It results in the following:

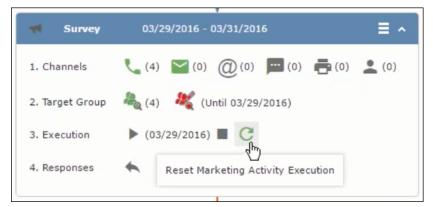
- All generated target group entities marked as "Generated" are deleted.
- The target group entities marked as "non Generated" are retained.
- The target group entities are regenerated based on the selection/query attached to this marketing activity.
- The target group entities that are marked as executed remains in the same state for the current target group.

To reset a marketing activity execution, perform the following:

- 1. Open the required campaign in the campaign designer.
- 2. On the marketing activity container, click to expand the container.

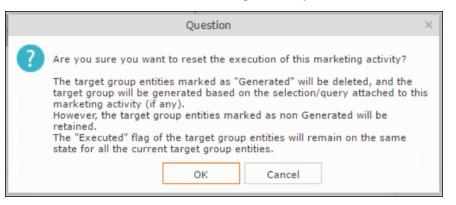


The following screenshot shows the **Survey** marketing activity container.



Notice that the execution button and the abort button are in grey. The reset button is in green and is active.

3. Click ^{CC} to reset the marketing activity execution. A confirmation window displays.



 Click OK. The target group is reset and the target group is regenerated. The edit target group until date is reset.

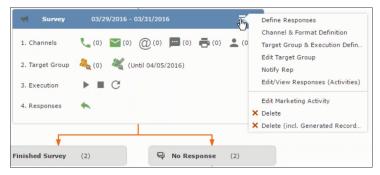
M Survey	03/29/2016 - 03/31/2016
1. Channels	(0)
2. Target Group	ዲ (0) 🛛 💐 (Until 04/05/2016)
3. Execution	▶ ■ C
4. Responses	*

Notice that the Target group button is yellow and once the target group generation is completed, the execution button is active and ready for execution. The colors of the target group icon and execute button are in green.

Notifying Reps about a marketing activity

To notify reps, perform the following:

1. From the context menu of a marketing activity container, select **Notify Rep**.



2. The Notify about record opens.

Notify	about record		
You can send this record to any other rep and/or extern Recipients:	rnal recipient. Please spe	ecify what you want to send:	
Additional internal recipients:			9
Additional external recipients:			
Subject: Survey (In Progress) 03/29/2016			
Body:			
✓ Insert Aurea CRM web link			
Request a delivery receipt			
Request a read receipt			
		Send	Cancel

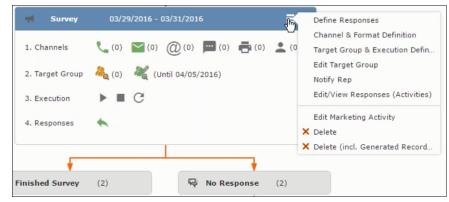
Enter the following information:

- **Recipients** Add the internal and external recipients (reps) who receive the notification.
- **Subject** Edit the subject of the notification email in this text field. You can also use the automatically generated subject.
- **Body** Enter the notification content in the Body field.
- Insert Aurea CRM web link Select this checkbox if you want to add the company URL in the notification.
- Request a delivery receipt Select this checkbox if you want a receipt of delivery.
- **Request a read receipt** Select this checkbox if you want to know if the notification was read by the recipient.
- 3. Click **Send** to send the notification to the selected reps.

Editing a Marketing Activity

To edit a marketing activity, perform the following:

- 1. Open the required campaign in the campaign designer.
- From the context menu of a marketing activity container, select Edit Marketing Activity.



3. The marketing activity window opens.

🛪 Campaign: Questionnaire; Marketing Act			
🛃 Edit 🗸 Save ⊘ Cancel 🛛 🖩 Calculate 🛛 🔝 🚳			
Marketing Activity Survey			
Starts on \$3/29/2016	Ends on 03/31/2016	Target group size (Target)	
Resp. Rep ID Super User	Costs Planned		
Text			

4. Click Edit to start editing the marketing activity.

	Questionnaire; Marketing A Cancel Calculate Calculate Cancel Can		irvey					+ ~
*Starts on	03/29/2016	~	*Ends on	03/31/2016		¥	Target group size (Target)	
Resp. Rep ID	Super User	93	Costs		R		(luiget)	
			Currency		+	~		
Text								

5. Make the required changes and click Save.

Defining Channels and Formats used in a Marketing Activity

To define the channels and formats for a marketing activity, perform the following steps:

- 1. Open the required campaign in the campaign designer.
- 2. On the marketing activity container, click **OK** to expand the container.

	Question	×
?	Are you sure you want to start the execution of this marketing activity? The preconditions for starting the execution of this campaign step will be checked and if satisfied the execution will start.	
	OK Cancel	

The following screenshot shows the **Survey** marketing activity container.

	Company Last Name		First Name	
	+ Add more		✓ With me	
ax. 15	 records per page 			Start Search
earch	Results			XI ~ Ø
ზე ∽	Туре	Company	Person	Response 1 (Marketing Act.)
	Telephone	Zummatechi	<u>Orlando Rizzi</u>	
	Telephone	Zummatechi	Carlene Mcnary	
	Telephone	Zummatechi	John Smith	
	Telephone	Lamplanet	Tonia Mertens	

The following is a brief description of the components of a marketing activity:

Channels - The first row shows the available channels of communication for a marketing activity. The following channels are available:

• Phone

	Last Name + Add more		~	First Name With me		
lax. 15	✓ records per page				5	Start Search
Search	Results					XI ~ O
1	Туре	Company		Person	Response 1 (Marketi	ng Act.)
v 0	Telephone	Zummatechi		<u>Orlando Rizzi</u>	Add 5 more	+ ~1
	Telephone	Zummatechi		Carlene Mcnary		
	Telephone	Zummatechi		John Smith		
	Telephone	Lamplanet		Tonia Mertens		

• Letter

		Edit/Vi	ew Responses (Activities)	Ξ.
Edit/Vi	ew Responses (Activi	ties)		0 ^
	Company			
	Last Name		First Na	me
	+ Add more		✓ With	me
Max. 15	 records per page 			Start Search
Search	n Results			II ~ 🔅
1	Туре	Company	Person	Response 1 (Marketing Act.)
	Telephone	Zummatechi	<u>Orlando Rizzi</u>	Finished Survey
	Telephone	Zummatechi	Carlene Mcnary	No Response
	Telephone	<u>Zummatechi</u>	<u>John Smith</u>	Finished Survey + ^
	Telephone	Lamplanet	Tonia Mertens	
				Response

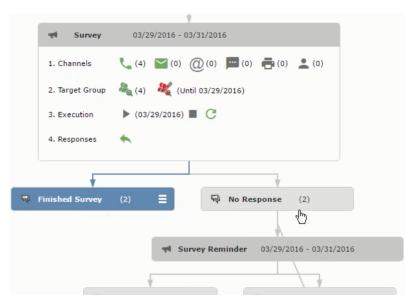
• Email

	*
Survey	03/29/2016 - 03/31/2016
1. Channels	📞 (4) 🔛 (0) @(0) 📕 (0) 📑 (0) 👱 (0)
2. Target Group	ዲ (4) 🛛 🤾 (Until 03/29/2016)
3. Execution	▶ (03/29/2016) ■ C
4. Responses	*
•	
R Finished Survey	(2) = No Response (2)
	d b
	Survey Reminder 03/29/2016 - 03/31/2016

• SMS

4. Responses	
😔 Finished Survey (2) No Response (2) =
	Survey Reminder 03/29/2016 - 03/31/2016
	1. Channels 📞 (0) 🎦 (0) @(0) 🚍 (0) 🚔 (0) 🔔 (0)
	2. Target Group Ag (2)
	3. Execution
	4. Responses

• Fax



In-person

		\$ G	Edit Target Group		
Edit Target	Group	Campaign Questionnaire Starts on 03/25/2016 Ends on 04/06/2016	Type Ques Status In Pr		^
Max. 15 🗸	Company Rep ID + Add more		Last Name Inactive ? With me	Start Search	
	Company	Person	Rep ID	ntact Person 🌐 Add Company 🗸 🖾 🗸 🏟 Moi Response Generated Inacti	
	<u>amplanet</u> Zummatechi	<u>Tonia Mertens</u> <u>Carlene Mcnary</u>	Super User Super User	No Response	

The numbers in brackets besides each channel represents the number of target group entities that is processed using this channel.

Target Group – In this step you can define the target groups (customers etc) who are to be the participants of this marketing activity.

Execution – In this step, you can execute and start the marketing activity.

Responses – After the execution of the marketing you can evaluate the responses from participants.

3. Click on any of the channel icons to open the **Channel & Format Definition** window.



The channel and format definition process contains three phases: **Define Channel(s)** > **Define Format** > **Define Default Values**. The window opens on the **Define Channel(s)** phase.

- **Define Channels** In this phase you can select the channels that are used to approach the customers for the marketing activities.
- **Define Format** In this phase you can define the formats to be used for each of the channels you selected in the first phase. For example a template document for an email or fax, the fields that are used in the generation of a letter and similar formats for each of the required channels. The fields you want to include from different CRM info areas in the templates.
- **Define Default values** You can define the default values for the marketing activities that are generated.
- 4. Provide the following information in the Define Channel(s) phase:

Format Definition

- Format Name You can give a name to the format definition or retain the automatically generated name. This field is mandatory.
- Lock Select this check box to lock the message format for the marketing activity.
- **Private** Select this check box to keep the message generated for the marketing activity private.

Preferred Channels

• Fixed – You can select one fixed channel.

Note: You cannot select variable channel, if you select a fixed channel.

- Variable (Priority) You can select multiple channels with variable priorities for the channels.
- **Generate** This selection generates activities for all entities to represent the successful generation during the marketing activity execution. This is selected by default and cannot be changed.

Save Channel(s) – Click this button to save the Channel format details you configured on this page.

Load Format – Click this button to open the Channel Formats search window. Select the required format previously created, from the search result and load it. You can then edit the format as required.

Proceed – Click this button to go to the next step, **Define Format**.

Note: If you have not saved the channel definition, you are prompted to save the channel configuration details before proceeding.

5. Click Save Channel(s). Click Proceed to open the Define Format window.

C

The Define Format window opens with tabs for each of the channel you selected. You can define the information required for the message formats required for the selected channels by clicking each of the tabs.

Note: The Phone and In-Person channels do not require and further configuration information. The remaining channels Letter, Email, SMS, and Fax require further configuration information you can define in this window.

The fields that are in Orange are mandatory fields. If you do not fill the mandatory fields then you can still save the channel format but you cannot execute the channel definition.

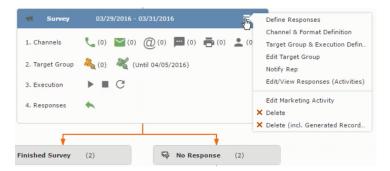
If you do not fill in a mandatory field and save the channel format, then if you go back to the Campaign designer you can see that the channels you selected is not green in color. See the screenshot below. The phone channel is in green color, but the Letter and Email channels are in grey.

	Question	<
?	Are you sure you want to reset the execution of this marketing activity? The target group entities marked as "Generated" will be deleted, and the target group will be generated based on the selection/query attached to this marketing activity (if any). However, the target group entities marked as non Generated will be retained. The "Executed" flag of the target group entities will remain on the same state for all the current target group entities.	
	OK Cancel	

 Click on the Letter icon and it directly opens the Letter tab in the Define Format process step. Enter the format details of the channels including all the mandatory steps.

📢 Survey	03/29/2016 - 03/31/2016
1. Channels	L (0) M (0) (0) (0) (0) (0) (0)
2. Target Group	ዲ (0) 🛛 💐 (Until 04/05/2016)
3. Execution	▶ ■ C
4. Responses	*

7. After providing the required information, click **Save Default Values**. Then click **Proceed** to move to the **Define Default Values** phase.



You provide a **Default Values Name** or use the automatically generated one. You can also search for and load a previously saved default values by using the **Load Default Values** button.

8. After entering the default values, click **Save Default Values** and then click **Proceed**. You are returned to the campaign designer window.

Notify about record	
You can send this record to any other rep and/or external recipient. Please specify what you want to send:	
Recipients:	
Additional internal recipients:	2
Additional external recipients:	
Subject:	
Survey (In Progress) 03/29/2016 Body:	
Insert Aurea CRM web link	
Request a delivery receipt Request a read receipt	
Send	ancel

Notice that the Phone and Letter channels icons are now in green.

Adding the Target Group and Execution Definition

To define the channels and formats for a marketing activity, perform the following steps:

- 1. Open the required campaign in the campaign designer.
- 2. On the marketing activity container:
 - Click to expand the container.

	Question	×
?	Are you sure you want to start the execution of this marketing activity? The preconditions for starting the execution of this campaign step will be checked and if satisfied the execution will start.	
	OK Cancel	

• Click the target group icon to open the Target Group.

	r Campaign: Questionnaire; Marketing Activity	: Survey	1
◀ Campaign: Questionnaire; Markei ፪ Edit ✔ Save ② Cancel	• • •		
Marketing Activity Survey Starts on §3/29/2016	Ends on 03/31/2016	Target group size (Target)	
13			

and **Execution Definition** window.

🖉 Edit 🖌 Save 🖉	Questionnaire; Marke		Survey				
*Marketing Activity	Survey						+ ~
*Starts on	03/29/2016	~	*Ends on	03/31/2016	~	Target group size	
Resp. Rep ID	Super User	93	Costs	G		(Target)	
			Currency		+ ~		
Text							

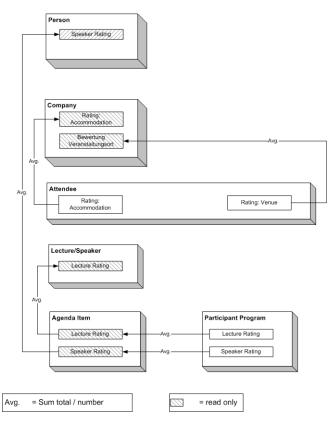
You can create the target group and define execution type using the following buttons:

- New Query Use this to create a target group using the Standard Query process.
- New Quick Query Use this to create a target group using the Quick Query process.
- Load Query Use this to search for and load a query that is already created and saved.
- Select/Rework Target Group Use this to select a different target group or modify the target group.
- Define Execution Type This allows you to define the dates until which the queries are executed to update the target group. You can also define the execution types.

If you were to start creating the target group, but stop in between and reopen this window it also shows the current query you were working on. It now have options to edit or unlink the current query from the marketing activity. For example:

🖳 New: Equipme	nt			
✓ Save				
Equipment	Beamer	+ ~		
Description				
Costs			Currency	+ ~
Quantity	1		Equipment Unit	+ ~

the above screenshot shows the current query that was being worked on to create the target group. The flag icon indicates that the current query is a standard type query.



- **3.** To create the target groups and define the execution type, perform one of the following:
 - Using the New Query button:
 - 1. Click New Query to open the standard New: Query window.
 - 2. Enter the **Query Name** and the **UQL syntax** for the query and run the query to get a list of entities for the target group. These are added to the target group.

Note: Instead of using an UQL, you can specify the infoarea, the fields to search, and the conditions by using the buttons in the Formatted and Conditions sections.

- 3. Click **Save** to proceed to the next step, **Define Execution Type** window. In this window you can specify the following information:
 - Edit target group until Specify the date until the target group can be updated based on the result of the query.
 - Execution Type Select the execution type from the drop-down list.

4. Click to open the **Create Target Group** step window.

55 - Shipment cannot be delivered	Ticket 55 - B2 - Shipment cannot be delivered								
55 B - Shipment cannot be delivered 55 - B2 - Shipment cannot be delivered 55 C - Shipment cannot be delivered	Edit	Save 🖉 Cancel 🗼	Hierarchy Tree	hy Tree 📲 Dispatching Dashboard 🖳					
723 - Two items in shipment damaged	End Customer K	rist Intl. OY	Contact Comp	Krist Intl. OY					
	End Customer M	Ir. Jonne Aaron	Contact Person	Mr. Jonne Aaron					
	Subject S	hipment cannot be delivered	No	55 - B2					
	Priority		Status	🔞 Open					
	Service Level		Туре						
	Problem Group		Problem						
	Item No.		Item Name						
	Link		Predecessor	55 B - Shipment cannot be delivered					

If any of the items in the previous two steps are incomplete, you get warning messages. For example, if you had not defined the execution type and edit target group until date fields in the Define Execution Type window then Create Target Group window displays the incomplete steps as shown below. Also notice that the Create Target Group tab at the top has a red dot in it instead of a green dot.

5. Click **Create Target Group** to complete the creation of the target group process. A notification window along with some progress indicators are created as shown in the screenshot below.

The Target Group icon is now orange in color to indicate that the target group creation is in progress. Also the Target Group row now has date until which the target group list can be updated. Once the target group is processed then the channels and target group icons has the target group numbers in the brackets besides the respective icons.

Once the server creates the target group and updates the marketing activity is to be executed on the date specified. The icons are displayed in green. See the screenshot below.

				Prio			Subj	> >>	Status	Created on	End	Curr	tor		•	Proble				Dec	cesse	d by	_	¥ ,	r W
P.4				Medi					Open	19.04.2013	Gabr		con			Monitor					er Park		10		
<u>ر</u> ا				Medi			Prob		Open	05.03.2014	SunT				-	Mainter		9		_	uko Ka	_	i		
-	-																							f 24	>
24	.04	- 2	6.0	4.20)14		New	Activi	ity					(Э (_				÷ (<u>[ş</u>] :
<			Apr	2014	ţ		>	2	Reps		т	hu 2	4.0	4.20	14	F	Fri 2	5.04	1.20	14	Sat	26.	04.2	014	
w	Mon	Tue				Sat	Sun				04	08	12	16	20	04	08	12	16	20	04	08	12	16	
14	31	1	2	3	4	5	6		Chris Aki						٩)									
15	7	8	9	10	11	12	13		Dominik L	andertinger															
16	14			17		19	20		John Doe						٩.) – – –					I				
17	21	22		24		26			Kazuko Ka	anzaki															
18	28		30	1	2	3	4		Simon Ede	er					٩.,)									
19	5			8					Stephen	Smith															
Gro				13 M			<u>~</u> <u>~</u>																		
Tick	et-re	elate y D	d rep		1 ping																				
		•		phor	ne		~										1								
	Sub	ject															10								

6. To edit the target group click . The Edit Target Group window opens. You can use the search queries to add more recipients to the target group.

Note: The target group icon turns Red (⁴⁴) after the "Until" date.

- To create the target groups and define the execution type using the New Quick Query option, perform one of the following:
 - 1. Click the New Quick Query button from the Target Group & Execution Definition window. The Create Target Group using Quick Query window is opened.

👒 CRM.launcher	\times
Aurea	
crm.web is requesting p following services: - MailMerge - DocumentEdit	permission for the
- AppLauncher Deny	ок

- 2. Select the Root Info Area from the dropdown list.
- 3. Click Run Query. The query results are listed. Click Finalize Query.
- 4. Define if the query results are Private Query or Public Query. Enter a name in **Save As ...** field.
- 5. Click Save to finalize the results and attach the query results to this marketing activity. The Create Target Group window opens.

Campaign De	signer					
		Ą	Create Target Group u	sing Quick Query		
	⁸ α Create Target Group using Quick Query	Compose Query	Run Query	Finalize Query	Define Execution Type	Create Target Group
⊜ Camp	You can now attempt to crea	te the target group, by c	licking the button	below.		

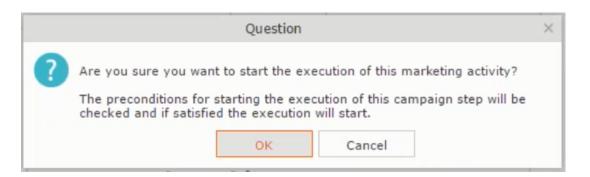
If any of the intermediate process steps are incomplete, you get a warning message, including if the target group is already created. A sample screenshot is provided below:

	#a	Create Target Group usi	ng Quick Query								
Ra Create Target Group	Compose Query	Run Query	Finalize Query	Define Execution Type	Create Target Group						
using Quick Query											
Target group cannot be created because	of the following reasons:			C	eate Target Group						
1. Target group has already been	1. Target group has already been created.										
Create Target Group											

6. Click Create Target Group to complete creating the target group.

Selecting or modifying the target group

- 1. Open the required campaign in the campaign designer.
- 2. On the marketing activity container:
 - Click OK to expand the container.



• Click the target group icon to open the Target Group

	📢 Campaign: Questionnaire; Marketing Activity:	Survey	□, ×
← Campaign: Questionnaire; Marke Edit ✓ Save ② Cancel Calculate Marketing Activity Survey	• • •		
Starts on p3/29/2016	Ends on 03/31/2016	Target group size (Target)	
Resp. Rep ID <u>Super User</u> Text	Costs Planned		

• and Execution Definition window.

	uestionnaire; Marketing Cancel 🖩 Calculate 🖳		: Survey				
*Marketing Activity	Survey						+ ~
*Starts on	03/29/2016	~	*Ends on	03/31/2016			
Resp. Rep ID	Super User	93	Costs		6	(Target)	
			Currency		+ 、	,	
Text							

3. Click Select/Rework Target Group. The Select/Rework Target Group window displays.

mpaign Desigr								
			₽ _q s	elect/Rework T	arget Group			
	elect/Rework Target Group			Select/Rewo	rk Target Group	execution Definition		^
Camp	✓ Target Groups							and All 🛞 🕞 🔮
	Search Marketing A	ctivities					0 ^	
	Marketing Activity	Add a value		+ ~	Level			
	Varian	t Add a value		+ ~	Resp. Rep ID		9	
	4	Add more		~	With me			
	Max. 5 👻 records per pa	ge					Start Search	
	Search Results 《						^	
	/ Marketing Activ	vity 🗟	Marketing	Status		Campaign	Campaign	
	Confirmation		Internal_x	Scheduled		Spring Promotion Event 2016	Event	
	Event			Scheduled		Source Campaign	Event	
	Event			Scheduled		Spring Promotion Event 2016	Event	
	Follow-up			Scheduled		Spring Promotion Event 2016	Event	
	Invitation			Scheduled		Spring Promotion Event 2016	Event	
							<< < 1 - 5 of 5+ > >>	

4. You can search for marketing activities and select the desired marketing activity. The target group entities for the selected marketing activity are listed below.

			₽ _q s	elect/Rework Target Group		
ect/Rewo up	ork Target			Select/Rework Target Group	Execution Definition	
✓ Target G	iroups					
Search N	Marketing Activities					• •
Search F	Results « < 1 - 5 of 1	1 > >>				^
1	Marketing Activity		Marketing	Status	Campaign	Campaign
	Confirmation		Internal_x	Scheduled	Spring Promotion Event 2016	Event
e = ·	Event			Scheduled	Source Campaign	Event
	Event			Scheduled	Spring Promotion Event 2016	Event
	Follow-up			Scheduled	Spring Promotion Event 2016	Event
	Invitation			Scheduled	Spring Promotion Event 2016	Event ≪ < 1 - 5 of 11 > >>
✓ Target G	roup Entities					
1	Company	Person		Rep ID	Response Generated	Inact Executed
	Lamplanet	Tonia Mertens		Super User		
	Lampionee	Toma Hercens		<u></u>		

5. Double click on the marketing activity to add the target group from the selected marketing activity to the target group of the current marketing activity. The Execution Definition window displays.

	a Select/Rework Target Group
್ಷಿ Select/Rework Target Group	Select/Rework Target Group
Proceed *Edit target group until 04/05/2016 *Execution Type One-off, execute selection/query	

- 6. Specify the following information:
 - Edit target group until Specify the date until the target group can be updated.
 - Execution Type Select the execution type from the drop-down list.
- 7. Click Proceed. The campaign designer window opens.

M Survey	03/29/2016 - 03/31/2016	≡ ^
1. Channels	🐛 (4) 🎦 (0) @(0) 💻 (0) 🖶 (0)	. (0)
2. Target Group	لام) المنا (Until 04/05/2016)	
3. Execution		
4. Responses	*	

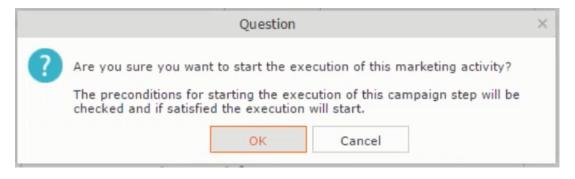
8. Click 🔳 to view the newly added participant to the target group.

		🖧 Edit Target Group			
Edit Target Group	Campaign Ques Starts on 03/25 Ends on 04/06	5/2016	Type Questionnaire Status In Progress	Resp. Rep ID Edit target g 04/05/2016	
Company Rep ID + Max. 15 <u></u> records per pag	Add more	9	Inactive ?	Start Search	
Search Results	Set Inactive 🗙 Delete 💄 Add Person	Add Person in Company	Add Contact Person	📕 Add Company 🗸 🕅 🗸 🏟	Modify List Fields
Company	Person	Rep ID	Response	Generated Inact	Executed
Zummatechi	Orlando Rizzi			 Image: A start of the start of	
Zummatechi	Carlene Mcnary			✓	
Zummatechi	John Smith			×	
u ⊟ → Lamplanet	Tonia Mertens			V	

Defining Execution Type

To define an execution type, perform the following:

- 1. Open the required campaign in the campaign designer.
- 2. On the marketing activity container:
 - Click OK to expand the container.



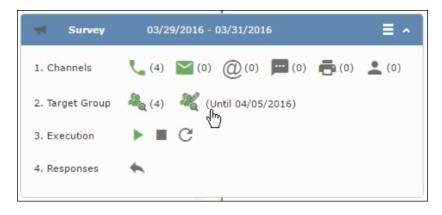
• Click the target group icon to open the Target Group

	📢 Campaign: Questionnaire; Marketing Activity: S	Survey	□, ×
	• • •		
Starts on \$3/29/2016	Ends on 03/31/2016	Target group size (Target)	
Resp. Rep ID Super User	Costs Planned		
Text			

• and Execution Definition window.

	Questionnaire; Marke		Survey				
*Marketing Activity	Survey						+ ~
*Starts on	03/29/2016	~	*Ends on	03/31/2016	~	Target group size	
Resp. Rep ID	Super User	8	Costs	l⊋		(Target)	
			Currency		+ ~		
Text							

- 3. Specify the following information:
 - Edit target group until Specify the date until the target group can be updated.
 - Execution Type Select the execution type from the drop-down list.
- 4. Click Proceed. The campaign designer window opens.



Executing a Marketing Activity

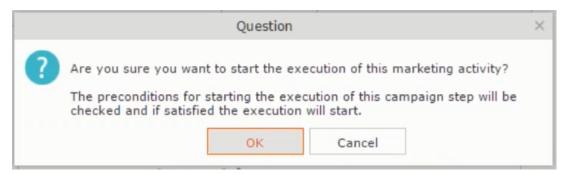
To execute a marketing activity, the following conditions should be met:

- All the selected channels and their formats should be defined. The selected channel icons would be green in color.
- The target groups should be defined. The Target group icons would be green in color.

- The current date should be within the scope of the start and end dates of the campaign.
- The "Edit target group until date" has to be defined. This date is visible besides the edit target group icon (3).

To execute a marketing activity, perform the following steps:

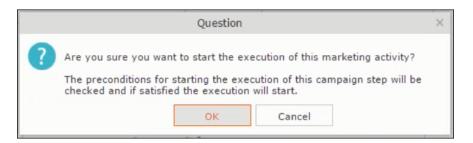
- 1. Open the required campaign in the campaign designer.
- 2. On the marketing activity container:
 - Click OK to expand the container.



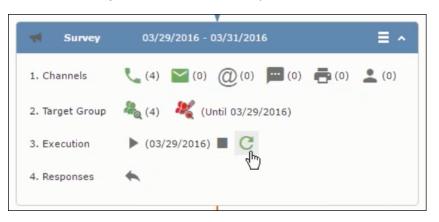
• The following screenshot shows the Survey marketing activity container.

dit//iou/ Boopopooo (Activit	ice)		<i>A</i> .
dit/View Responses (Activit	ies)		\$ ^
Company			
Last Name		First Name	
+ Add more		✓ With me	
ax. 15 🖌 records per page			Start Search
earch Results			🖾 ~ 🏟
🕅 🗸 Type	Company	Person	Response 1 (Marketing Act.)
투 🗮 👻 Telephone	<u>Zummatechi</u>	<u>Orlando Rizzi</u>	
Telephone	Zummatechi	Carlene Mcnary	
Telephone	Zummatechi	John Smith	
Telephone	Lamplanet	Tonia Mertens	

3. Click the ▶ button on the **Execution** row. A query window pops up asking you to confirm the operation.



4. Click **OK**. A server notification informs you that the marketing activity has started and informs you when it is completed.



The Execute button is now greyed and the date on which the execution starts automatically is displayed in brackets besides it.

Note: The edit target group icon is now in red ($\overset{\&}{}$). The abort button is greyed out once the execution starts. And reset button is now activated. The Responses button remains grey until the all the participants have responded.

Editing/Viewing the Responses for a Marketing Activity

To edit or view the responses for a marketing activity, perform the following steps:

1. Click icon in the responses row. The Edit/View Response (Activities) window opens.

Edit/View Resp	onses (Activities)				
Com					÷ ^
	npany				
Last	Name			First Name	
	+ Add more		~	With me	
ax. 15 👻 records	per page				Start Search
earch Results					XI ~ Ø
🖌 🗸 Type		Company		Person	Response 1 (Marketing Act.)
🗏 📃 🗸 Telephone	e	<u>Zummatechi</u>		<u>Orlando Rizzi</u>	
Telephone	e	Zummatechi		Carlene Mcnary	
Telephone	e	Zummatechi		John Smith	
Telephone	e	Lamplanet		Tonia Mertens	

You can search for specific participants and view/edit their responses.

2. Select a row and click on Response 1 (Marketing Act.) column to activate and record the response.

		📢 Edit/Vi	iew Responses (Activities)	□,
Edit/Vie	ew Responses (Activit	ties)		÷ ^
	Company			
	Last Name		First Name	
	+ Add more .		✓ With me □	
Max. 15	 records per page 			Start Search
Search	n Results			Ø - ¢
ſ	Туре	Company	Person	Response 1 (Marketing Act.)
10	Telephone	Zummatechi	<u>Orlando Rizzi</u>	Add 5 more + 🗸
	Telephone	Zummatechi	Carlene Mcnary	
	Telephone	Zummatechi	John Smith	
	Telephone	Lamplanet	Tonia Mertens	

3. Click the drop-down list to select the response type. Click on the + button to add more response types to the response catalogue entries.

Company Last Name + Add more Max. 15 V records per page Start Search			Edit/View	Responses (Activities)	□.
Last Name First Name + Add more With me Max. 15 v records per page Start Search Max. 15 v records per page Start Search Search Results Image: Company V pe Company Person Response 1 (Marketing Act.) Telephone Zummatechi Orlando Rizzi Finished Survey Telephone Zummatechi Zummatechi John Smith Telephone Zummatechi John Smith Finished Survey Telephone Lamplanet	Edit/Vi	iew Responses (Activiti	es)		÷ •
+ Add more With me Max. 15 v records per page Start Search Search Results Image: Start Search Image: Type Company Person Type Company Person Telephone Zummatechi Orlando Rizzi Telephone Zummatechi Carlene Monary V@ Telephone Zummatechi Telephone Zummatechi John Smith Telephone Lamplanet Tonia Mertens		Company			
Max. 15 v records per page Start Search Search Results Image: Start Search Image: Start Search Image: Type Company Person Response 1 (Marketing Act.) Telephone Zummatechi Orlando Rizzi Finished Survey Telephone Zummatechi Carlene Monary No Response V Image: Telephone Zummatechi John Smith Finished Survey Telephone Lamplanet Tonia Mertens Image: Telephone		Last Name		First Name	
Search Results Image: Company Person Response 1 (Marketing Act.) Image: Telephone Zummatechi Orlando Rizzi Finished Survey Image: Telephone Zummatechi John Smith Image: Finished Survey + Image: Finished Survey Image: Telephone Zummatechi John Smith Image: Finished Survey + Image: Finished Survey Image: Telephone Lamplanet Image: Finished Survey + Image: Finished Survey		+ Add more		✓ With me	
Type Company Person Response 1 (Marketing Act.) Telephone Zummatechi Orlando Rizzi Finished Survey Telephone Zummatechi Carlene Mcnary No Response Image: Carlene Mcnary No Response Image: Carlene Mcnary No Response Telephone Zummatechi John Smith Finished Survey Telephone Lamplanet Tonia Mertens Image: Carlene Survey	lax. 15	✓ records per page			Start Search
Type Company Person Response 1 (Marketing Act.) Telephone Zummatechi Orlando Rizzi Finished Survey Telephone Zummatechi Carlene Mcnary No Response Image: Carlene Mcnary No Response Image: Carlene Mcnary No Response Telephone Zummatechi John Smith Finished Survey Telephone Lamplanet Tonia Mertens Image: Carlene Survey					
Telephone Zummatechi Orlando Rizzi Finished Survey Telephone Zummatechi Carlene Mcnary No Response Image: Comparison of the structure Zummatechi John Smith Finished Survey Telephone Zummatechi John Smith Finished Survey Telephone Lamplanet Tonia Mertens (jipished Survey	Search	h Results			図 ~ 尊
Telephone Zummatechi Carlene Mcnary No Response Image: Construction of the system of t	1	Туре	Company	Person	Response 1 (Marketing Act.)
✓ O Telephone Zummatechi John Smith Finished Survey + ^ Telephone Lamplanet Tonia Mertens ()pished Survey ()pished Sur		Telephone	Zummatechi	Orlando Rizzi	Finished Survey
Telephone Lamplanet Tonia Mertens		Telephone	Zummatechi	Carlene Mcnary	No Response
(Haished Survey		Telephone	<u>Zummatechi</u>	John Smith	Finished Survey + ^
Ukished Survey		Telephone	Lamplanet	Tonia Mertens	
					Response

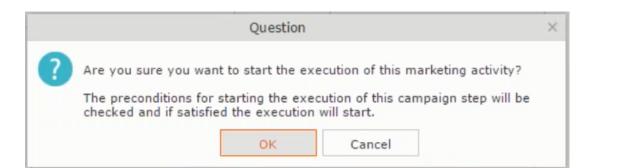
Edit the responses for all the participants.

4. Close the window to come back to the campaign manager window. The response icon is be green in color. This shows that response for all the participants is recorded.

	*
📢 Survey	03/29/2016 - 03/31/2016
1. Channels	(4) (0) (0) (0) (0) (0) (0) (0) (0)
2. Target Group	🦓 (4) 💐 (Until 03/29/2016)
3. Execution	▶ (03/29/2016) ■ C
4. Responses	*
💐 Finished Survey	(2) 🗮 🖓 No Response (2)
	40
	Survey Reminder 03/29/2016 - 03/31/2016

Notice the "(2)" in the response containers for the Survey marketing activity: **Finished Survey** and **No Response** show. This indicates that two participants completed the survey and two members did not respond.

5. Click the button to expand the **Survey Reminder** follow-up marketing activity container for those participants who did not respond to the Survey.



4. Responses 🔶	
Finished Survey (2	2) Response (2)
	Survey Reminder 03/29/2016 - 03/31/2016
	1. Channels 📞 (0) 🎦 (0) @(0) 🔤 (0) 🚔 (0) 👤 (0)
	2. Target Group 🦓 (2)
	3. Execution 3. Execution Image: Comparison of the second seco

You can see that two participants who did not respond are already added to the target group of the follow-up marketing activity.

6. Click to open the Edit Target Group window for the Survey Reminder follow-up marketing activity.

🖧 Edit Target Group						
Edit Target Group	Campaign Question Starts on 03/25/20 Ends on 04/06/20	016 Туре		Rep ID rget g		
Company Rep ID + A Max. 15 Y records per page	dd more	Last Name	?	Start Search		
Search Results Company Lamplanet Zummatechi	Set Inactive X Delete & Add Person & Person Tonia Mertens Carlene Monary	Add Person in Company & Add Rep ID Super User Super User	Contact Person III Add Compan Response Generated No Response No Response			

You can see that the two members with "No Response" in the **Response** column are listed.

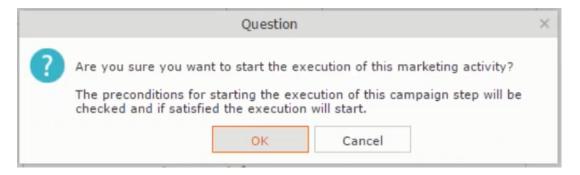
Resetting the Marketing Activity Execution

Restarting a marketing activity is possible if the marketing activity execution is completed. It results in the following:

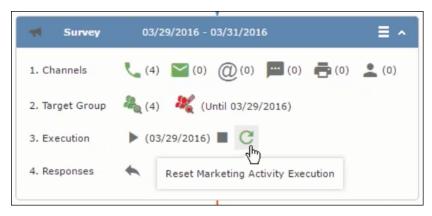
- All generated target group entities marked as "Generated" are deleted.
- The target group entities marked as "non Generated" are retained.
- The target group entities are regenerated based on the selection/query attached to this marketing activity.
- The target group entities that are marked as executed remains in the same state for the current target group.

To reset a marketing activity execution, perform the following:

- 1. Open the required campaign in the campaign designer.
- 2. On the marketing activity container, click to expand the container.

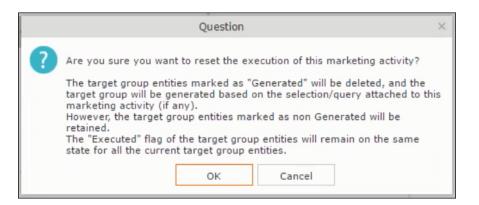


The following screenshot shows the **Survey** marketing activity container.



Notice that the execution button and the abort button are in grey. The reset button is in green and is active.

3. Click ^C to reset the marketing activity execution. A confirmation window displays.



4. Click **OK**. The target group is reset and the target group is regenerated. The edit target group until date is reset.

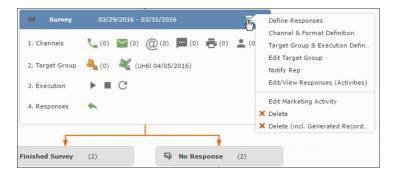
Survey	03/29/2016 - 03/31/2016
1. Channels	(0) (0) (0) (0) (0) (0) (0) (0) (0)
2. Target Group	ዲ (0) 🛛 💐 (Until 04/05/2016)
3. Execution	▶ ■ C
4. Responses	*

Notice that the Target group button is yellow and once the target group generation is completed, the execution button is active and ready for execution. The colors of the target group icon and execute button are in green.

Notifying Reps about a marketing activity

To notify reps, perform the following:

1. From the context menu of a marketing activity container, select Notify Rep.



2. The Notify about record opens.

Notify about red	ord		
You can send this record to any other rep and/or external recip	eient. Please specify	what you want to se	end:
Recipients:			
Additional internal recipients:			
			2
Additional external recipients:			
Subject:			
Survey (In Progress) 03/29/2016			
☑ Insert Aurea CRM web link			
✓ Insert Aurea CRM web link □ Request a delivery receipt			
Request a delivery receipt			
Request a delivery receipt			
Request a delivery receipt			
Request a delivery receipt			
Request a delivery receipt			

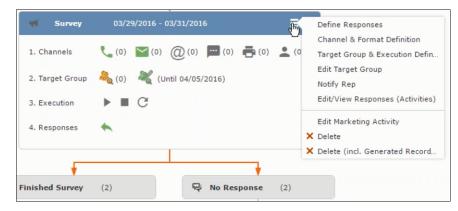
Enter the following information:

- **Recipients** Add the internal and external recipients (reps) who receive the notification.
- **Subject** Edit the subject of the notification email in this text field. You can also use the automatically generated subject.
- **Body** Enter the notification content in the Body field.
- Insert Aurea CRM web link Select this checkbox if you want to add the company URL in the notification.
- Request a delivery receipt Select this checkbox if you want a receipt of delivery.
- **Request a read receipt** Select this checkbox if you want to know if the notification was read by the recipient.
- 3. Click **Send** to send the notification to the selected reps.

Editing a Marketing Activity

To edit a marketing activity, perform the following:

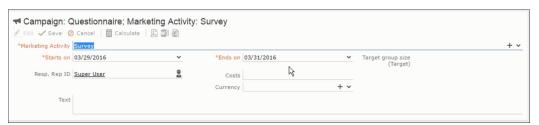
- 1. Open the required campaign in the campaign designer.
- 2. From the context menu of a marketing activity container, select Edit Marketing Activity.



3. The marketing activity window opens.

	📢 Campaign: Questionnaire; Marketing Activit	y: Survey	□, ×
✓ Campaign: Questionnaire; Market			
Marketing Activity Survey			
Starts on 23/29/2016	Ends on 03/31/2016	Target group size (Target)	
Resp. Rep ID Super User	Costs Planned		
Text			

4. Click Edit to start editing the marketing activity.



5. Make the required changes and click Save.

Email Campaign Management

Email Campaign Management Using Aurea Campaign Manager (formerly called Lyris HQ)

As part of a campaign, the marketing activities can be carried out using multiple channels, like letters, fax, telephone, and email. Generally the email channel is the most preferred channel for marketing activities. While Aurea CRM provides its own email channel, it does not provide all the capabilities of a dedicated Email marketing solution. In order to provide a sophisticated email marketing channel Aurea CRM is integrated with Aurea Lyris HQ, a full-fledged Email marketing solution. Aurea CRM Enterprise edition users can use Lyris HQ to handle their email marketing activities and take full advantage of the sophisticated email marketing capabilities of Lyris HQ.

Note: Aurea CRM Enterprise license enables you to access Lyris HQ features. In order to use Lyris HQ features you require a separate license for Lyris HQ. Please contact email:support@aurea.com for more information on licensing Lyris HQ. You have to enable Lyris HQ in Aurea CRM in order to use Lyris HQ features from Aurea CRM.

Aurea Campaign Manager (CAM) notifies Aurea CRM of the actions it performs by using the event flow mechanism to send event notifications. Events are generated by the Aurea Campaign Manager, when it performs some action on Contacts, Mailing lists, Segments, and Messages. Events are also generated by user actions, like opening an email message or clicking a response link provided within the email message. The event notifications generated by the Campaign Manager is placed in event queues in the CRM Sync Middleware and received by the CRM.Server listening for event notifications.

Cross product integration between Aurea CRM and Aurea Lyris HQ allows you to perform the following tasks:

- Transfer a marketing activity to Lyris HQ.
- Transfer a CRM Target group to Lyris HQ.
- Receive Notifications and updates from Lyris HQ.

The following sections provide more details:

Transferring a Marketing Activity to Lyris HQ

Learn to transfer market activity to lyris HQ.

As part of a campaign you create one or more marketing activities. These activities could be conducted via multiple channels with email as one of the marketing channels. You can then transfer the marketing activity to Lyris and let Lyris HQ handle the marketing activity through the email channel.

This section describes how to transfer a marketing activity to Lyris, however it does not explain the full steps involved in creating a new campaign with marketing activities. For more information on working with marketing activity using the Campaign Designer, see Working with Marketing Activities on page 573.

You can transfer a marketing activity to Lyris HQ from the campaign designer or from the standard editor for marketing activities.

To illustrate the process of Lyris HQ as the email marketing channel, we can create a **NewProductLaunchEvent** campaign and invite our loyal and potential customers to the event, as part of the marketing activity. The invitations are extended using only the email channel.

Transferring from the Campaign Designer

To transfer a marketing activity to Lyris HQ from the campaign designer, perform the following:

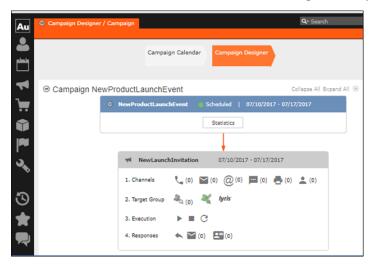
1. Open an existing campaign or create a new campaign. For more information, see Viewing a campaign on page 564 or Creating a new campaign from scratch on page 565. The following screenshot shows the example **NewProductLaunchEvent** campaign.

Campaign Calendar Ca	mpaign Designer	
unchEvent		Collapse All Expand All 🛞 🕞 🏚
NewProductLaunchEvent	Scheduled	03/24/2017 - 03/31/2017

2. From the campaign container context menu select New Marketing Activity. The New Marketing Activity window displays.

Au	Campaign Designer / Campaign	Q- Search
₽ ₩	Campaign Calendar Campaign Designer	
X	Campaign NewProductLaunchEvent C NewProductLaunchEvent Scheduld 67/10/2017 - 67/17/2017 New: Marketing Activity	Collapse All Expand All
\$ ₽ ₽ \$ ~	New Marketing Activity V Save Marketing Activity Save Marketing NewLaunchInvitation Activity Starts on 07/10/2017 Resp. Rep ID Alax Costs Currency Currency Currency Currency Currency Cu	*
3	Text	

- 3. Enter the required details. In this example we create a NewLaunchInvitation as the Marketing Activity.
- 4. Click Save to create the new marketing activity container in the campaign designer.



5. Click (email channel). The Channel & Format Definition page displays.

Au	Campaign Designer / C	Campaign			Q- Search	
			hannel & Format Defin	ition		
1 [Channel & Format Definition	Define Channel(s)	Define Format	Default Values (C	Contact) Default Valu	ues (Mailing)
). •	 Format Definition Format Name 		nal_x0000064000000	7		
	 Lock Preferred Channel Define by which channel((s) the customer shall be app		choose how you want t	to document the contact.	- 1
36	Fixed Phone Letter E-mail SMS Fax In Person	Pho Let E-r SM Fao	nail IS	Gener I Act Ma	tivity	
3 ★				Load Format	Save Channel(s)	Proceed

- a. Select the E-mail channel radio button under the Fixed column.
- **b.** Select the Activity and Mailing options under the Generate column. These are optional.

Note: If you wish to use multiple channels for the marketing activity, you can select the E-mail checkbox along with other required channels under the Variable (Priority) column.

- 6. Click Save Channel(s).
- 7. Click Proceed, to go to the format definition phase. The Define Format page displays.

	mpaign			Q- Search
		Channel & Format Defini	tion	
Channel & Format Definition	Define Channel(s)	Define Format	Default Values (Contact)	Default Values (Mailing
✓ Format Definition				
Format Name		itionnaire-Survey rivate		
*				
E-mail				
huric A				
Lyris A	rder the transfer to Lyris to	be possible, all the requir	ed fields have to be completed)	+ ~
Create In Lyris (In o Lyris Mailing List E-mail: Send as	rder the transfer to Lyris to	be possible, all the requin	ed fields have to be completed)	
Create In Lyris (In o Lyris Mailing List E-mail: Send as E-mail from	rder the transfer to Lyris to	be possible, all the requin	ed fields have to be completed)	
Create In Lyris (In o Lyris Mailing List E-mail: Send as	rder the transfer to Lyris to	be possible, all the requin	ed fields have to be completed)	
Create In Lyris (In o Lyris Mailing List E-mail: Send as E-mail from From Name	rder the transfer to Lyris to	be possible, all the requin	ed fields have to be completed)	
Create In Lyris (In o Lyris Mailing List E-mail: Send as E-mail from From Name	rder the transfer to Lyris to	be possible, all the requin	ed fields have to be completed)	

You can see that Lyris Email channel definition page is available. If Lyris is not enabled then the standard email channel definition page would be visible. Contact your CRM administrator to enable the Lyris email marketing channel.

8. Populate the fields as described below. These fields are mandatory in order to transfer the marketing activity to Lyris.

Note: The Create in Lyris button is activated once all the fields are populated and the channel format is saved.

- Lyris Mailing List:Click to get a drop-down list of mailing lists in Lyris. Select the required mailing list. You can also create a new mailing list. To create a new mailing list, perform the following:
 - 1. Click +. The Create new mailing list in Lyris dialog displays.

Create new mailing list	t in Lyris \times
Name: CRM-NewProductLaunchEv	vent - NewLaunc
ОК	Cancel

A default name (CRM-NewProductLaunchEvent - NewLaunchInvitation) is provided which is a concatenation of three names: default mailing list prefix configured in the CRM Designer (CRM-) + the campaign name (NewProductLaunchEvent) + the marketing activity name (NewLaunchInvitation). In case the marketing activity does not belong to a campaign then the prefix and the activity name is used. For this example, CRM-NewLaunchInvitation. You can rename it to a desired name. In this example, we change the name to CRM- NewLaunchInvitation.

2. Click OK. A new blank mailing list is created in Lyris.

If for some reason the mailing list could not be created in Lyris then the dialog displays the appropriate error message. For example, the following screenshot shows the error message that a mailing with the same name already exists.

Create new maili	ng list in Lyris $ imes$
Name:	
CRM-NewLaunchInv	itation
Lyris Error: Another name already exists	mailing list with this
ОК	Cancel

- E-mail: Send as: Select the desired format of the email you wish to send: HTML or Text
- E-mail From: Enter the email address of the marketing email sender.
- From Name: Enter the name of the sender.
- Subject: Enter the subject for the email.

Note: The above fields are used as properties of the email messages that are created in Lyris.

9. Click Save Channel Format(s). After the channel format is saved, the Create in Lyris button gets activated.

10.Click Create in Lyris.

A dummy message is created in Lyris for the marketing activity. Depending on your selection for the E-mail Send as field the dummy message is a text or HTML message. A tick appears besides the *lyris* icon on successful creation of the message. And a Detach message button displays. The ids for the mailing list and message created in Lyris are displayed along with the links to the instances in Lyris. See the screenshot below.

Au	00	ampaign Designer / Camp	aign O	Q• Search
			Channel & Format Definition	- ×
•		Channel & Format Definition	Define Channel(s) Define Format Default Values (Contact)	Default Valu
1		✓ Format Definitio		
		Format Name	Questionnaire-Survey Private	
		*		
100		E-mail		
r		lyris V		
3		P Detter	h message	
Ň		Please note that modif	ing the fields below will result to the update of the corresponding fields in the linked I	lyris message.
		Lyris Mailing List	CRM-NewLaunchInvitation	
		Lyris Message Id	5074	
		E-mail: Send as	HTML	~
		E-mail from	dirk@ecogreen.com	
		Lyris From Name	Dirk	
		Subject	New Product Launch - Invitation	
$\overline{\mathcal{C}}$				
~				
$\mathbf{\pi}$			Load Format Save Channel Format(s)	Proceed

Click Detach Message to delete the message created in Lyris. Once the message is detached, all the attributes of the message are cleared, including the links in the Lyris Message ID and Lyris Mailing List fields. The corresponding message created in Lyris is also deleted. If the message is already sent then any responses received for the message are ignored by Lyris and Aurea CRM does not get any event corresponding to the message.

11.Click Save Channel Format(s).

12.Click Proceed.

Transferring from the Standard Editor

If you prefer to use the standard editor for creating marketing activities instead of the Campaign Designer, you can still transfer a marketing activity to Lyris from the standard editor.

To transfer a marketing activity from the standard editor to Lyris, perform the following:

- 1. Select Marketing > Marketing Activities from the CRM menu. The Search Marketing activities page displays.
- 2. Enter the search filters and click Start Search. The search results list displays.
- 3. Open the context menu of the required marketing activity from the result list and select Tab View or Tree View. The Marketing Activity window displays.

	ht			Q• Search		
				<.		- 2
Marketing Activity Survey, Varia	ition event					
🗏 Menu 🖉 Edit 🛹 Save ⊘ Cancel 🗐	Calculate 🛱 Create targe	at group 🐌 Start Marketi	ng Activity 🖺 📶 👸			
Marketing Activity Survey						
Starts on 03/21/2017			Ends on 04/04/2017			
Variant event			Resp. Rep ID Super User			
Level			Sales Cycle			
Marketing Activity Details Extras						
Status In Progress			Туре			
Execution status		Car	ipaign starts on			
Campaign status Scheduled		Ca	npaign ends on			
Event Location						
Text						
						_
Parent Data Related Data					10.1	~ =
Graph × Target Group × Respon	ses × Reps × Activ	vities × Mailings ×	Work Orders × Execution >	Statistics ×	Document	> v
🔲 Add Company 🚨 Add Person in Comp	any R Add Parson R /	udd Contact Person	d from Company Exualtae 🖷 M	ld Person in Compa	inv from Eaunri	har
H Add Company Add Person In Comp	AND PEISON A	an contact verson T At		ion Favorites 🖙 🛙		
Company	Person	Rep ID		Response	Inac. Ge	
Realty Zone	Mr. Peter Austerlitz	Super User	Survey	Response	IndC Ge	31
really zone	m. Peter AUStenitz	Super User	Survey			

Note: Double clicking a marketing activity from the result list opens the marketing activity in the campaign designer.

- 4. Select Create Marketing Activity Format from the context menu. The Marketing Activity Format window displays.
- 5. Select the preferred channel. Click the E-mail radio button under Fixed, then click the Email tab.

Marketing Activity Format for	Marketing Act	Q• Search
Marketing Activity Form	nat for Marketing Activity S	Survey, Variation event
Previous 🖌 🖌 Save		
Preferred Channel		
Fixed Phone Letter Semail SMS Pax In Person Letter E-mail SMS Fax Create In Lyris (In order the	Variable Phone texter E-mail State ax ax transfer to Lyris to be possible, all the	Cenerate Activity Halling Work Order required fields have to be completed)
Lyris Mailing List E-mail: Send as		
E-mail from From Name		
Subject		

You should see the Lyris Email channel definition page. If Lyris is not enabled then the standard email channel definition page would be visible. Contact your CRM administrator to enable the Lyris email marketing channel.

6. The remaining steps are similar to those listed for transferring a marketing activity to Lyris from the campaign designer, see steps 8 to 10 in the topic Transferring from the Campaign Designer on page 632.

Making changes to the marketing activity transferred to Lyris

When you modify and save the message details of a marketing activity that is already transferred to Lyris, the changes are automatically transferred to the corresponding Lyris instance of the marketing activity's message.

For example, in the screenshots below, the E-mail from, Lyris From Name and Subject field values are changed and the channel format is saved. The screenshots of Lyris show the changes reflected in the corresponding fields of the message.

Au	Campa	ign Designer / Campaign		Q- Search	
•			Channel & Format Definition		×
Ë		Channel & Format Definition	Define Channel(s) Define Format Default Values (Contact) Default Values (Mailing)		^
4) ií 1	⊜ Can	The record has been saved. Y Format Definition Format Name	QuestionaineSurvey		I
► 3°		□ Lock ▼ E-mail lyris ⁻ ✓ Detach mess	Physice		
5		Lyris Mailing List Lyris Message Id E-mail: Send as E-mail from Lyris From Name	C28-1 Next Sunch Initiation 6223 HTML MRML	~	
© ★		Subject	Load Format Save Channel Format(s)	Proceed	

The values are changed from **dirk@ecogreen.com**, Dirk, and "New Product Launch Invitation" to **maya@ecogreen.com**, Maya, and "New Product Launch Event – Ecogreen" respectively. The corresponding changes are reflected in the Lyris message.

Dashboard	Campaigns & Me 🗊 Split Test EA Re 🗵 New p	oduct lau 🖾 Lists	5	8 +	
1. Selec	t Recipients \rightarrow 2. Edit Message \rightarrow 3. Test & Proof \rightarrow 4. Send Options \rightarrow 5. Review &	Launch Save			< Back Next >
	led Message: New Product Launch Event- EcoGreen タ v Split Test Version				
Subject	New Product Launch Event- EcoGreen				
From	Maya	From Email 🔓 r	maya@ecogreen	.com	
HTML	Text				
Select Te	mplate • Import URL • Import HTML Insert • Design Code	Disable Design View			Preview Quick Test -
← → Format	- √ 10 1 10 20 20 20 20 20 20 20 20 20 20 20 20 20				<u>_</u>

Note: Automatic transfer of changes to Lyris can take some time.

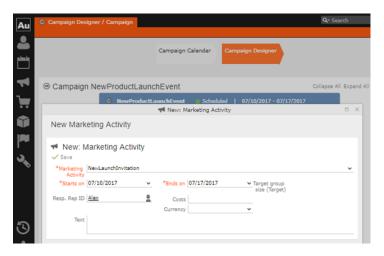
Transferring from the Campaign Designer

To transfer a marketing activity to Lyris HQ from the campaign designer, perform the following:

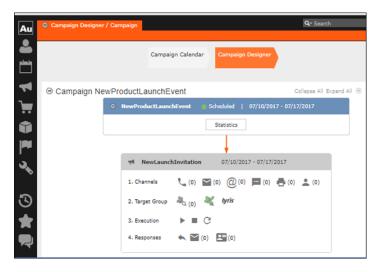
 Open an existing campaign or create a new campaign. For more information, see Viewing a campaign on page 564 or Creating a new campaign from scratch on page 565. The following screenshot shows the example NewProductLaunchEvent campaign.

	Campaign Calendar	Campaign Designer	
Campaign NewProductLa	unchEvent		Collapse All Expand All 🛞 💿 🕤
C	NewProductLaunchE	vent 🌒 Scheduled	03/24/2017 - 03/31/2017

2. From the campaign container context menu select New Marketing Activity. The New Marketing Activity window displays.



- 3. Enter the required details. In this example we create a NewLaunchInvitation as the Marketing Activity.
- 4. Click Save to create the new marketing activity container in the campaign designer.



5. Click (email channel). The Channel & Format Definition page displays.

Au	Campaign Designer /	Campaign			Q- Search	
			_			
		Ch	annel & Format Defi	nition	= ×	
	Channel & Format Definition	Define Channel(s)	Define Format	Default Values (Contact)	Default Values (Mailing)	
`	✓ Format Definition	1				
Û	Format Name	Intern	al_x00000064000000 /ate	17		
	 Preferred Channe Define by which channel 		roached. Subsequently	choose how you want to docume	ent the contact.	
36	Fixed Phone Letter E-mail SMS Fax In Person	Variab Pho Lett SMS Fax	le (Priority) ne ter tail 5	Generate Activity Ø Mailing		
3						ļ
*				Load Format Save C	hannel(s) Proceed	

- a. Select the E-mail channel radio button under the Fixed column.
- **b.** Select the Activity and Mailing options under the Generate column. These are optional.

Note: If you wish to use multiple channels for the marketing activity, you can select the E-mail checkbox along with other required channels under the Variable (Priority) column.

- 6. Click Save Channel(s).
- **7.** Click Proceed, to go to the format definition phase. The Define Format page displays.

			Channel & Format	Definition			
Chan Form	nel & at Definition	Define Channel(s	a) Define Forma	Default Va	elues (Contact)	Default Values (Mailir	ng)
~	Format Definition						
Form	nat Name Jock		Questionnaire-Survey				
~							
۲ الا	mail						
۲ الا	reate In Lyris (In o	rder the transfer to Ly	rris to be possible, all the	required fields have	to be completed)		
۲ الا	ris 🛕	rder the transfer to Ly	vris to be possible, all the	required fields have	to be completed)	+	• •
۲ الا	ris 🛕 reate In Lyris (In o Lyris Mailing List	rder the transfer to Ly	rris to be possible, all the	required fields have	to be completed)	+	• •
۲ الا	ris 🛦 reate In Lyris (In o Lyris Mailing List E-mail: Send as	rder the transfer to Ly	rris to be possible, all the	required fields have	to be completed)	+	> >

You can see that Lyris Email channel definition page is available. If Lyris is not enabled then the standard email channel definition page would be visible. Contact your CRM administrator to enable the Lyris email marketing channel.

8. Populate the fields as described below. These fields are mandatory in order to transfer the marketing activity to Lyris.

Note: The Create in Lyris button is activated once all the fields are populated and the channel format is saved.

- Lyris Mailing List:Click to get a drop-down list of mailing lists in Lyris. Select the required mailing list. You can also create a new mailing list. To create a new mailing list, perform the following:
 - 1. Click +. The Create new mailing list in Lyris dialog displays.

in Lyris $\qquad imes$
ent - NewLaunc
Cancel

A default name (CRM-NewProductLaunchEvent - NewLaunchInvitation) is provided which is a concatenation of three names: default mailing list prefix configured in the CRM Designer (CRM-) + the campaign name (NewProductLaunchEvent) + the marketing activity name (NewLaunchInvitation).

In case the marketing activity does not belong to a campaign then the prefix and the activity name is used. For this example, CRM-NewLaunchInvitation. You can rename it to a desired name. In this example, we change the name to CRM- NewLaunchInvitation.

2. Click OK. A new blank mailing list is created in Lyris.

If for some reason the mailing list could not be created in Lyris then the dialog displays the appropriate error message. For example, the following screenshot shows the error message that a mailing with the same name already exists.

Create new mailing list in Lyris	×				
Name:					
CRM-NewLaunchInvitation	_				
Lyris Error: Another mailing list with this name already exists					
	_				
OK Cancel					

- E-mail: Send as: Select the desired format of the email you wish to send: HTML or Text
- E-mail From: Enter the email address of the marketing email sender.
- From Name: Enter the name of the sender.
- Subject: Enter the subject for the email.

Note: The above fields are used as properties of the email messages that arecreated in Lyris.

9. Click Save Channel Format(s). After the channel format is saved, the Create in Lyris button gets activated.

10.Click Create in Lyris.

A dummy message is created in Lyris for the marketing activity. Depending on your selection for the E-mail Send as field the dummy message is a text or HTML message. A tick appears besides the *lyris* icon on successful creation of the message. And a Detach message button displays. The ids for the mailing list and message created in Lyris are displayed along with the links to the instances in Lyris. See the screenshot below.

00		algn		U	Q• Search
		c	channel & Format Definition		
	Channel & Format Definition	Define Channel(s) Define Format	Default Values (Contact)	Default Valu
9	✓ Format Definition	n			
	Format Name		estionnaire-Survey		
	Lock		Private		
	*				
	C.mail.				
	E-mail				
	huda (h message			
	lyris 🗸 Detad		ill result to the update of the	corresponding fields in the linked	Lyris message.
	lyris ✓ Detad Please note that modify	ring the fields below w		corresponding fields in the linked	Lyris message.
	lyris ✓ Detad Please note that modify Lyris Mailing List	ing the fields below w		corresponding fields in the linked	Lyris message.
	lyris ✓ Detad Please note that modify Lyris Mailing List Lyris Message 1d	ing the fields below w CRM-NewLaunchInvita		corresponding fields in the linked	Lyris message.
	lyris V Detad Please note that modify Lyris Mailing List Lyris Message Id E-mail: Send as	ing the fields below w CRM-NewLaunchInvita 5074 HTML		corresponding fields in the linked	Lyris message. V
	lyris V Detad Please note that modify Lyris Mailing List Lyris Message Id E-mail: Send as	ing the fields below w CRM-NewLaunchInvita 5074 HTML dirk@ecogreen.com		corresponding fields in the linked	Lyris message. V
	Lyris C Detad Please note that modify Lyris Massage 1d E-mail: Send as E-mail from Lyris From Name	ing the fields below w CRM-NewLaunchInvita 5074 HTML dirk@ecogreen.com	tion	corresponding fields in the linked	Lyris message.
	Lyris C Detad Please note that modify Lyris Massage 1d E-mail: Send as E-mail from Lyris From Name	ing the fields below w CRM-NewLaunchinvita 5074 HTML dirk@ecogreen.com Dirk	tion	corresponding fields in the linked	Lyris message.
	Lyris C Detad Please note that modify Lyris Massage 1d E-mail: Send as E-mail from Lyris From Name	ing the fields below w CRM-NewLaunchinvita 5074 HTML dirk@ecogreen.com Dirk	tion	corresponding fields in the linked	Lyris message.

Click Detach Message to delete the message created in Lyris. Once the message is detached, all the attributes of the message are cleared, including the links in the Lyris Message ID and Lyris Mailing List fields. The corresponding message created in Lyris is also deleted. If the message is already sent then any responses received for the message are ignored by Lyris and Aurea CRM does not get any event corresponding to the message.

11.Click Save Channel Format(s).

12.Click Proceed.

Transferring from the Standard Editor

If you prefer to use the standard editor for creating marketing activities instead of the Campaign Designer, you can still transfer a marketing activity to Lyris from the standard editor.

To transfer a marketing activity from the standard editor to Lyris, perform the following:

- 1. Select Marketing > Marketing Activities from the CRM menu. The Search Marketing activities page displays.
- 2. Enter the search filters and click Start Search. The search results list displays.
- 3. Open the context menu of the required marketing activity from the result list and select Tab View or Tree View. The Marketing Activity window displays.

Marketing Activity Survey, Variation event New Will East _ See _ Constant # _ Constant target group >>> Start Harketing Activity D = D = D = D = D = D = D = D = D = D	Marketing	Activity Survey, Variati	on event			Q• Search	_	
term Edit Vision Harkstring Activity Ends on 04/04/2017 Variante werk Ends on 04/04/2017 Variant werk Ends on 04/04/2017 Variant werket Sales Cycle Variant werk Sales Cycle Variant werk Sales Cycle Variant werk Sales Cycle Variant werk Campaign status Campaign status Statustica Campaign Status Reps Add Contact Herson Madd Person Statustica Document Add Stereson Statu						< .	×	
Matketing Adthirty Survey Ends on 04/04/2017 Starts on 03/21/2017 Ends on 04/04/2017 Valuet event Reso. Rep 10 Specificities Level Sales Cycle Matketing Adthirty Details Execution ritities Campaign starts on Campaign starts Scheduled Campaign starts Scheduled Campaign ends on Event Loation Text Text Parent Data Related Data Graph : Disgraf Group X Add Company Add Oreson in Company & Add Person & Add Contact Person & Add from Person Praventes +> Of Board Add Person high add Contact Person & Add from Person Praventes +> Campaign from Person Exact (See to Logingraf) Add Company Person Rep 10 Marketing Addrify Response in Sec. Gen.	Marketir	ng Activity Survey,	Variation event					
Statis on 34/1742172 Variante event Level Sales Color Astraktiming Activity Details Extras Execution status Execution status Schedulad Execution status Schedulad Execution status Execution status Schedulad Execution status Execution status Execution status Schedulad Execution status Execution	Menu 🥖	Edit 🗸 Save ⊘ Cano	el 📗 Calculate 🖧 Create targe	et group 🗱 Start Marketi	ing Activity 📙 🗐 🔞			
Variant event Level Resp. Rep ID Super User Harketing Activity Details Status the Progress Type Status the Progress Type Compainy status Scheduled Compainy ands on Event Location Text	м	arketing Activity Survey						
Level Sales Cycle Starketing Additivity Details Execution status Type Execution status Campaign status on Campaign status scheduled Campaign status scheduled Campaign ends on Event Location Text		Starts on 03/21/2	017		Ends on 04/04/2017			
Marketing Activity Details Extras Status to Responses Type Excercition status Campaign ends on Campaign status Scheduled Campaign ends on Excercition status Campaign ends on Excercition status Campaign ends on Parent Data Responses × Responses × Add Person Add Company Add Person Add Company Add Person Add Company Marketing Activities × Internet Company Person Rep ID Marketing Activity Response		Variant event			Resp. Rep ID Super User			
Status In Progress Type Execution status Campulgin status on Campulgin status on Event Location Text Campulgin status on Campulgin ands on Event Location Text Campulgin status on Campulgin ands on Event Location Text Event Location Text<		Level			Sales Cycle			
Execution status Schedund Campaign status on Campaign status on Campaign status Schedund Campaign ends on Test Percent Data Related Data Graph & Derget Group & Responses & Reps & Activities & Mallings & Work Orders & Execution & Statistics & Document > Activities & Mallings & Work Orders & Execution & Statistics & Document > Activities & Mallings & Work Orders & Execution & Statistics & Document > Activities & Mallings & Work Orders & Execution & Statistics & Document > Activities & Mallings & Work Orders & Execution & Statistics & Document > Activities & Mallings & Work Orders & Execution & Statistics & Document > Activities & Mallings & Work Orders & Execution & Statistics & Document > Activities & Mallings & Work Orders & Execution & Statistics & Document > Activities & Mallings & Work Orders & Execution & Statistics & Document > Activities & Mallings & Work Orders & Execution & Statistics & Document > Activities & Mallings & Work Orders & Execution & Statistics & Document > Activities & Mallings & Work Orders & Execution & Statistics & Document > Activities & Mallings & Work Orders & Execution & Statistics & Document > Activities & Mallings & Work Orders & Execution & Statistics & Document > Activities & Mallings & Work Orders & Execution & Statistics	Marketing	Activity Details Ex	tras					
Campaign ends on Event Lotation Text Arrent Data Related Data		Status In Progr	ess		Туре			
Event Location Text Text Parent Data Related Data Graph Target Group × Responses × Reps × Mailings × Work Orders × Execution × Statistics × Document > gl Add Company & Add Person in Company & Add Person & Add Contact Person & Add Fram Company Favorites * Mail Terror Person Provides * Mail Person # Add Contact Person & Add Fram Company Favorites * Mail Person # Add Contact Person * # Add Fram Person Provides * Mail Person # Add Contact Person * # Add Fram Person Provides * Mail Note: # Add Fram Person # Add Contact Person * # Add Fram Person Person # Add Fram Person	8	Execution status		Car	npaign starts on			
Text Graph × Target Group × Responses × Reps × Activities × Mailings × Work Orders × Execution × Statistics × Document > # Add Company ▲ Add Preson in Company ▲ Add Preson ★ Add Contact Person ★ Add Preson Pavoites + Description Person Pavoites + Description Person Pavoites + Difference P	0	ampaign status Scheduk	ed	Ca	mpaign ends on			
Parent Data Related Data Parent Data		Event Location						
Graph K Target Group X Responses X Reps X Activities X Hallings X Work Orders X Execution X Statistics X Document I III Add Company & Add Person In Company Gal Add Person & Add Costact Person & Add Form Company Favorets & Add Person In Company Favorets & Add Person Person Person Person Add Contact Person & Add Costact Person Marketing Addity Person Rep ID Marketing Addity Persone Inc. Gen.		Text						
Graph × Target Group × Responses × Responses × Responses × Hallings × Work Orders × Execution × Statistics × Document > III Add Company & Add Person In Company & Add Person & Add Contact Person & Add Form Company Favorites * Add Person In Company Favorites * Document > III Add Contact Person & Add Contact Person * Add Form Person Pervoltes * Document > III Company Person Rep ID Marketing Adding * Persone								
Graph K Target Group X Responses X Reps X Activities X Hallings X Work Orders X Execution X Statistics X Document I III Add Company & Add Person In Company Gal Add Person & Add Costact Person & Add Form Company Favorets & Add Person In Company Favorets & Add Person Person Person Person Add Contact Person & Add Costact Person Marketing Addity Person Rep ID Marketing Addity Persone Inc. Gen.								
👔 Add Company 🔹 Add Person in Company 🌋 Add Person 🌋 Add Contact Person 🌪 Add from Company Favorites 🌪 Add Person in Company from Favorites 👷 Add Person Favorites 👘 Diplay Al Records 👻 Company Person Pavorites Head Person Pavorites H	arent D	ata Related Da	ta				10	~ =
	Graph	Target Group X	Responses × Reps × Activ	vities × Mailings ×	Work Orders × Executio	n × Statistics ×	Document	> •
Company Person Rep ID Marketing Activity Response Inac Gen	🔲 Add	Company 🚨 Add Person	in Company 🚊 Add Person 🚊 A	idd Contact Person 🌟 Ac	id from Company Favorites 🤺	Add Person in Comp	any from Favor	ites
					🚖 Add from	Person Favorites 🖙	Display All Reco	ords
Reality Zone Mr. Peter Austerlitz Super User Survey	1	Company	Person	Rep ID	Marketing Activity	Response	Inac G	en
		Realty Zone	Mr. Peter Austerlitz	Super User	Survey			

Note: Double clicking a marketing activity from the result list opens the marketing activity in the campaign designer.

- 4. Select Create Marketing Activity Format from the context menu. The Marketing Activity Format window displays.
- Select the preferred channel. Click the E-mail radio button under Fixed, then click the Email tab.

Marketing Activity Format for M	arketing Act	Q• Search
Marketing Activity Forma	at for Marketing Activity S	survey, Variation event
🗲 Previous 🖌 🗸 Save		
✤ Preferred Channel		
Fixed Phone Letter * E-mail SMS Fax In Person Letter Fax Cyris: Create In Lyris (In order the training the tr	Variable Phone Letter Email SMS SMS Fax In Person	Generate Activity Mailing Work Order required fields have to be completed)
Lyris Mailing List E-mail: Send as E-mail from		* *
From Name Subject		
		Save

You should see the Lyris Email channel definition page. If Lyris is not enabled then the standard email channel definition page would be visible. Contact your CRM administrator to enable the Lyris email marketing channel.

6. The remaining steps are similar to those listed for transferring a marketing activity to Lyris from the campaign designer, see steps 8 to 10 in the topic Transferring from the Campaign Designer on page 632.

Making changes to the marketing activity transferred to Lyris

When you modify and save the message details of a marketing activity that is already transferred to Lyris, the changes are automatically transferred to the corresponding Lyris instance of the marketing activity's message.

For example, in the screenshots below, the E-mail from, Lyris From Name and Subject field values are changed and the channel format is saved. The screenshots of Lyris show the changes reflected in the corresponding fields of the message.

Au	Campa	ign Designer / Campaign		Q• Search
			Channel & Format Definition	a x
		Channel & Format Definition	Define Channel(s) Define Format Default Values (Contact) Default Values (Mailing)	î
ች 🗦 🚭 🖬 🔧	⊛ Can	The record has been saved. Format Definition Format Name Lock Frmail Lyris: Detach mess	Oversionnane-Survey	
Č 🚖		Lyris Mailing List Lyris Message Id E-mail: Send as E-mail from Lyris From Name	HTML mays@ecogreen.com	Proceed

The values are changed from **dirk@ecogreen.com**, Dirk, and "New Product Launch Invitation" to **maya@ecogreen.com**, Maya, and "New Product Launch Event – Ecogreen" respectively. The corresponding changes are reflected in the Lyris message.

Dashboard	d Campaigns & Me (2) Split Test EA Re (2) New product lau (2) Lists (2) +	-
1. Selec	t Recipients > 2. Edit Message > 3. Test & Proof > 4. Send Options > 5. Review & Launch Save	< Back Next >
	uled Message: New Product Launch Event- EcoGreen ۶ w Split Test Version	
Subject	New Product Launch Event- EcoGreen	
From	Maya From Email 🔓 maya@ecogreen.com	
HTML	Text	
Select Te	emplate • Import URL • Import HTML Insert • Design Code Disable Design View	Preview Quick Test •
6 7	∦ 10 10 8 00 ΞΞΞ ⊈ # ΞΞΞ Β Ζ <u>U</u> Α.• Α.•	
Format	Font Size Σ	<u> </u>

Note: Automatic transfer of changes to Lyris can take some time.

Deleting an Email Marketing Activity in Aurea CRM

Deleting an email marketing activity in Aurea CRM also deletes the corresponding segment created in the Aurea Campaign Manager. If any messages are received by the Aurea Campaign Manager related to the deleted Segment (marketing activity) then those messages are ignored by the Aurea Campaign Manager. A notification is also generated for the Rep responsible for the marketing activity.

The marketing activity container menu provides two delete menu options: Delete, and Delete (Incl Generated Records). Both the options work the same, with the added ability to also clear all the links and records generated in the scope of the marketing activity.

Default Values for Marketing Activity Mailings

The default Mailings values defined for a marketing activity are included in the Mailings records maintained for all email marketing activities and responses to an email message for each target group member. The Mailings record also maintains the status of an email message sent to the corresponding Contacts in Lyris. The Mailings record is updated in Aurea CRM by the events (EmailOpenedMessage, DeliveryStatusMessage, and BounceDetailsMessage) generated by Lyris. The Mailing record is first created by Aurea CRM on receiving the DeliveryStatusMessage event, when Lyris sends the email message to the target group member.

Click the response icon to open the Edit /View Responses (Mailings) page. See the screenshot below:

			Edit/View Response	s (Mailings)		
Edit/Vi	ew Responses (Mailings)					
	Company .					
	Last Name		First Name			
	+ Add more	¥				
Max. 15	✓ records per page			Start Search		
Search	Company		Person		Response 1 (Marketing Act.)	0
	Final Demo Company		Marek Grabka			
	Final Demo Company		Demo3			
	Final Demo Company		Demo2			
	Final Demo Company		Demo1			
		Ť				
		-				

Opening a Mailings records shows the default values set in the Default Values (Mailings) step of the Channel and Format definition, after transferring the marketing activity to Lyris. The default values are visible under the General tab of the Mailings record of the target group member.

Campaign Designer / Campaign ×	🔀 Mailing FinalDemoMA1 (2017-07-06)	
📮 Final Demo Company 👌 💄 Marek Gra	abica	
Mailing FinalDemoMA1 (20)	017-07-06)	
🗏 Menu 🛃 Edit 🗸 Save 🥝 Carried		
General Marketing Activity	Company Final Demo Company Person Marck Grabka Date 2017-07-06	Marketing Activity FinalDemoMA4
	Result Lyris Email Opened	Status 🗌
	Unit Cost 123,00	Currency Dollar
	Channel E-mail TXT	Sales Stage
Parent Data 말 문 ~ () Enal Demo Company 말 문 ~ (호 Marek Grabka 말 문 ~ (팩 Marek Grabka	DemoMAL Variation	

Notice that the Results field shows that the marketing email message was opened by the recipient target group member. The message reads Lyris Email Opened. The other possible values that are related to Lyris events are Lyris Email Sent, Lyris Email Delivered, and Lyris Email Bounced. These correspond to the state of the email messages that were sent to the contacts by Lyris.

You can manually change the status of the email message in the Mailing record, if for some reason Lyris did not generate the event to reflect the change in status of the email message for a target group member. This way the responsible Rep can maintain the flow of the email marketing activity.

Viewing Messages and Mailing Lists Created in Lyris

To view the details of the message created in Lyris, see perform the following:

- 1. Click the link for Lyris Message Id. The Lyris login page displays.
- 2. Enter your login credentials.

The Lyris Dashboard window displays.

3. Click on the Messages menu in the left panel.

The Messages panel displays.

- 4. Search for the message using the Message Id displayed in Aurea CRM.
- 5. Open the message.

You can see that the empty message is created and is open in the Edit Message view.

lyr	is/HQ	Hi Pradeep Kumar, op	stest - Settings Help Logofi
٠	Email Marketing	Dashboard Campaigns & Me 💿 New product lau 💿 Split Test EA Re 💿 Lists 💿 🔸	
_	Lists Attributes	1. Select Recipients > 2. Edit Message > 3. Test & Proof > 4. Send Options > 5. Review & Launch Seve	< Back Next >
2	Contacts	Scheduled Message: New product launch invitation /	
¢	Segments	Add New Split Test Version	
۰	Campaigns & Messages	Subject New product launch invitation	
ыłа,	Reports	Prom Email & dirk@ecogreen.com	
-	Email Test Overview	HTML Tet	
	Asset Library	Select Templet • Emport URL • Emport HTMR. Ensert • Design Code 🕀 Disable Design View	Preview Quick Test •
Ŷ	Launch EmailLabs		Frenen Gence reat .
		≪ 沙 北 別 総 総 注 目 / 年 単 単 単 ■ ■ Z U / A+ A・	
		Format 👻 Font 👻 Size 🔍 🖪 🖃 🕰 🍓 🚓 🏴 🔮 🚓 🥙 🏶	-
	Mobile Marketing		
	Content Managem	Multipart Text Only	Encoding & Character Set •

- 6. You can edit the email.
- **7.** Perform test and proofing and other tasks on email allowed in Lyris. See the Lyris documentation for more information.

To view the details of the mailing list created in Lyris, perform the following:

- 1. Click the link for Lyris Message Id. The Lyris login page displays.
- 2. Enter your login credentials.
 - The Lyris Dashboard window displays.
- 3. Click on the Lists menu in the left panel.



The Lyris Email Marketing - Lists page opens in a new

4. Scroll the mailing lists to find the mailing list id created in CRM in the List Name column. See the screenshot above. The mailing list id created in this example is CRM-NewProductLaunchEvent.

Note: Search for the mailing list using the Lyris Mailing List name displayed in Aurea CRM.

5. You can click on the different links and update the mailing list as required.

Transferring a CRM Target group to Lyris HQ

Learn to transfer a CRM target group to Lyris HQ.

Once you have transferred the marketing activity to Lyris, you have to create the target group and execution definition for the marketing activity, for more information see Adding the Target Group and Execution Definition on page 606. Next, you can transfer the target group to Lyris.

Note: If you try to transfer a target group for a marketing activity before transferring the marketing activity to Lyris, you are reminded to transfer the marketing activity first. The following message displays: "*Target group transfer cannot be started, because marketing activity has not yet been transferred to Lyris. Please retry after transferring the marketing activity to Lyris.*"

Transferring a target group to Lyris involves the following phases:

- Pick CRM Fields—select the CRM fields listed for the info areas. These fields are added as attributes of a contact that is created in Lyris for each of the target group members transferred to Lyris. The CRM fields are limited to the following infoareas:
 - Company (FI)
 - Contact Person (CP)
 - Person (PE)
 - Person in Company (KP)
- 2. Map CRM fields—the fields selected in the first step are mapped to equivalent demographics present in Lyris or new demographics can be created and added to the Lyris demographics.
- 3. Create Segment—associate the target group with a segment in Lyris. This is important because multiple marketing activities can use the same mailing list. And segments enables you to identify the mailing list members in the context of a marketing activity.
- 4. **Overview**—this phase displays the number of active target group entities that are eligible to be transferred to Lyris.
- 5. Schedule Transfer—this phase schedules the transfer and ensures that the transfer process remains active until all the entities are transferred to Lyris. For example, if a connection time out happens during the transfer to Lyris, then CRM would try again at a later time until the transfer is complete.

On transferring a target group, an instance for each of the target group member is created in Lyris, using their email contact and demographic details. The target group members are then added as participants to the corresponding mailing list created in Lyris. Aurea CRM ensures the inclusion of the target group members to the segment created in Lyris. You can transfer a target group to Lyris HQ from the campaign designer or from the standard editor for marketing activities

Transferring from the Campaign designer

To transfer a target group for a marketing activity to CRM designer:

1. Open the marketing activity in the campaign designer.



2. Click in the Target Group row. The Transfer Target Group to Lyris page displays.



- 3. Click the Pick CRM Fields tab. To select the required CRM fields to be included as attributes for the contacts in the target group, perform the following:
 - a. Select the required Infoarea from the Info Area dropdown list.
 - b. Click the check box to select the required field from each infoarea. You can search for specific fields by typing the field name in the Search Field Name filter. You can sort the displayed fields by name or type by clicking the respective field headers: Field Name or Field Type.
 - c. Repeat the above steps to select the required fields from different infoareas.

The following fields from the infoareas are not displayed:

- The SeqNo, and StatNo fields.
- The fields for which the user does not have view rights.
- The fields containing email addresses. They are automatically transferred.
- 4. Click Proceed. The Map CRM fields tab gets activated and the following message displays: *Please wait until the mappings between CRM fields and Lyris demographic mappings are loaded...*

Aurea CRM communicates with Lyris server to retrieve the corresponding Lyris demographics and displays the mapping table.

To map the CRM fields listed in the table with the retrieved Lyris demographics, perform the following:

a. Click in the Lyris Demographics column to display the list of demographics retrieved from the Lyris server and select the appropriate demographic for each of the listed CRM field. The demographics listed available are the ones that are compatible with the CRM field based on the CRM Field type. See the screenshot below:

	т	ransfer Target Group To Lyris		C	ı ×
Transfer Targe Group To Lyris		Fields Map CRM fields	Create Segment		^
lyris Please, select the l	yris demographics th	at each of the CRM fields below will be maj	oped to:		
CRM Field	Info Area	Lyris Demographic			
Last Name	Person (PE)	CRM.LastName		+	~
First Name	Person (PE)			+	^
Country	Person (PE)	CRM.ActivityExecutionId			1
Date of Birth	Person (PE)	CRM.City CRM.FirstName			
Private customer	Person (PE)	CRM.LastName CRM.LastName CRM.LastName-Demo			

If you cannot find an appropriate Lyris demographic for the CRM field, you can create a new Lyris demographic. See the next step.

- **b.** To create a new demographic, perform the following:
 - a. Click +. The Create new demographic dialog displays.
 - b. Enter a name for the demographic. A suggested name (name of the corresponding CRM field) is displayed for the demographic to be created in the Name textbox. You can also specify a name according to your preference.
 - c. Select the type of the demographic from the Type field.

In the screenshot below a new demographic for the field private customer is created. It is named CRM.PrivateCustomer and the type selected is a Checkbox.

		Transfer Target Gro	oup To Lyris	
ransfer Target Froup To Lyris	Pick CRM Fields	Map CRM fie	Ids Create Segment Overview	v S
lyris Please, select the Lyr	is demographics that each o	f the CRM fields below v	vill be mapped to:	
CRM Field	Info Area	Lyris Demographic	Create new demographic	×
Last Name	Person (PE)	CRM.LastName		+ ~
First Name	Person (PE)	CRM.FirstName	lyris	+ ~
Country	Person (PE)	CRM.Country1		+ ~
Date of Birth	Person (PE)	CRM.DateOfBirth	EcoGreenInc-NewProductLaunchEvent	+ ~
Private customer	Person (PE)		Name: CRM.PrivateCustomer	+ ~
			Type: Checkbox	
			QK Cancel	
				Proceed

- d. Click OK. The new demographic is created in Lyris.
- e. To view the mapped demographic attributes in Lyris, open Attributes tab and select the required mailing list from the List filter. The Attribute column should show the list of mapped attributes from CRM. See the screenshot below.

lyris <mark>HQ</mark>		Hi Pradeep Kumar. <u>opstest</u> +	Settings Help Logof
Semail Marketing	Dashboard Attributes 💿 +		
🗉 Lists	Email Marketing - Attributes		Options IE.
Attributes		® A	dd 🖉 Edit 🔆 Disable
🍰 Contacts	List: EcoGreenInc-NewProductL		9
Segments		-	
🐟 Campaigns &	Attribute	✓ Type	ID
Messages	Email	Text	0
Le Reports	CRM.PrivateCustomer	Checkbox	32002
Email Test Overview	CRM LastName	Text	31981
Asset Library	CRM.FirstName	Text	31990
	CRM.DateOfBirth	Date	31982
Launch EmailLabs	CRM.Country1	Select List	31978

- 5. Click Proceed. The Create Segment tab displays.
- 6. Click Create Segment. A segment for this mailing list is created in Lyris.

The name of the segment created in Lyris is displayed. Clicking the named URL opens the required Lyris segment in a new tab. The name generated is a concatenation of the name and the record id of the marketing activity.

	Transfer Target Group To Lyris					
Transfer Target Group To Lyris	Pick CRM Fields	Map CRM fields	Create Segment	Overview		
Lyris Segment exists in Lyriss <u>Invitation</u> x000008440000022b Create Segment Segment was created in Lyris. Please click on button 'Proceed'	below to proceed to next step.					

When the segment for this target group is created in Lyris, it generates the Segment generated event. You can view the segment information in the Segment tab of the Edit/View Target group window.

7. Click Proceed. The Overview tab displays.

	1	fransfer Target Group To	o Lyris			D X
Transfer Target Group To Lyris	Pick CRM Fields	Map CRM fields	Create Segment	Overview	Schedule Transfer	^
lyris: 2 Larget group entities mill be transferred to Lyris. (Active target group entities that are going to be handled using "Email" channe	D					

The number of active target group entities that are eligible to be transferred to Lyris is mentioned.

Note: If there are no target group entities for the email channel available to be transferred to Lyris, then a message "*No target group entities are eligible to be transferred to Lyris*" is displayed. You should go back and create the target group.

- 8. Click Proceed. The Schedule Transfer tab displays.
- Click Schedule Target Group Transfer. A tick mark appears signifying that the transfer process is scheduled.

	Т	ransfer Target Group To	Lyris		
Transfer Target Group To Lyris	Pick CRM Fields	Map CRM fields	Create Segment	Overview	Schedule Transfer
Lyris \checkmark Transfer of target group to Lyris has been scheduled. Schedule Target Group Transfer					

10.To check the status of the transfer, open the Collaboration > To-Dos menu and search for the required scheduled activity. The status of the scheduled transfer should be visible. The following screenshot shows the status of the transfer is In Progress.

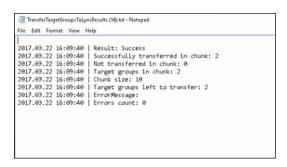
Campaign	Designer / Campaign ×	📓 Search To-Dos 🛛			
Search T	o-Dos Rep/Group ID <u>Super User</u>			Type Add a value	~
-	Due on MM/DD/mm		~	Status Add a value	~
	+ Add more .		~	With me	
Max. 15 ¥	records per page				Start Search
Search R	esults				
N 2	Due on	Туре		Status	Subject
∎= = ~	03/22/2017	Calculate	(here)	In Progress	
	03/22/2017	Calculate	Ð	Completed	
	03/22/2017	Calculate		Completed	
io (03/22/2017	Calculate		Completed	
	02/22/2017	Caleslate		Completed	

The transfer status changes to Completed, once the target group is transferred successfully.

11.To view the details of the transfer process, open the scheduled entity from the To-Do search list. The Related Data tab contains a link to a text file that contains information about the target group transfer process.

Crm	🕝 Campaign Designer / Campaign × 🔡 To-Do - Cal	culate K	
-	To-Do - Calculate		
	Edit V Save @ Cancel	ber User	
1	Type Ca Link <u>03</u>		
	Subject Appointments Details		
	Due on 03, Starts on 03, Ends on 03,	/22/2017	
2	Duration		
80	Related Data		
	2 Title	Keyword	Size (bytes)
	TransferTargetGroupsToLyrisResults.txt		155

Open the document to find the information on the transfer process.



- 12.You can check the contacts created in Lyris for the transferred target group members. To list the contacts in Lyris and view the contact details created, perform the following:
 - a. Open the Contacts tab and select the mailing list from the List filter. The contacts created for his mailing list is displayed.



b. Click View to open the details of the contact generated. The View Contacts dialog displays.

			Attributes			
Email:	john smith 1@ aurea.com		First Name	John D		
			Last Name	Smith x000000640000022b		
Status:	C Active		CRM.ActivityExecutionId			
	Proof Contact		CRM.Country			
Added: Mar 22, 2017 7:00 AM		CRM.DateOfBirth CRM.PrivateCustomer				
Inail Hist	ory			Sert	Opened Clic	\$Thru
Email Sut	iject Line	Message	Name		Sent	
			No Data Av			
			No Results Found			

The field values of the mapped fields are transferred from CRM and populated in the corresponding mapped demographics in Lyris

Transferring from the Standard Editor

If you prefer to use the standard editor for creating marketing activities instead of the Campaign Designer, you can still transfer a marketing activity to Lyris from the standard editor.

To transfer a marketing activity from the standard editor to Lyris, perform the following:

- 1. Select Marketing > Marketing Activities from the CRM menu. The Search Marketing activities page displays.
- 2. Enter the search filters and click Start Search. The search results list displays.
- 3. Open the context menu of the required marketing activity from the result list and select **Tab View** or **Tree View**. The **Marketing Activity window** displays.

					۲.	~	>
Marketing Activity Inivitation, Varia	ation						
		Start Marketing Activity Transfer Tar	get Group To Lyris 🖳 📶 🗃				
Marketing Activity Inivitation							
Starts on 05/25/20			Ends on 05/28/2016				
Variant			Resp. Rep ID Super User				
Level			Sales Cycle				
Marketing Activity Details Extras Status Schedule			Туре				
Execution status	a		Campaign starts on				
Campaign status Schedule			Campaign starts on Campaign ends on				
Event Location	a		Campaign ends on				
Event Location Text							
Text							
Parent Data Related Data							=
Graph × Target Group × Responses ×	Reps 🖂 Activities 🖂 Mailin	gs × Work Orders × Execution	Statistics S Document Links				
Add Company R Add	Person in Company R Add Person	n 🚊 Add Contact Person 🗯 Add from	Company Favorites 🔺 Add Person in C	omnany from Favorites	Add from Par	on Eavorite	
a kee company a kee	Add Person	And contact Person T Add Iron	Kun Person in c	Animpany num revolues		All Record	
J Company	Person	Rep ID	Marketing Activity	Response		e Genera	
Company Super User	Person Super User	Super User	Inivitation				

Note: Double clicking a marketing activity from the result list opens the marketing activity in the campaign designer.

- 4. Select Related Data > Target Group tab.
- 5. If there are no items listed in the Target Group Tab, click on the **Create Target Group** link.
- 6. Once your target group is defined, click the Transfer Target Group to Lyris link. The Transfer Target Group to Lyris page displays.

			Transf	er Target Group To Lyri	s		
ransfe Group		rget	ck CRM Fields	Map CRM fields	Create Segment	Ove	erview
lyris		o CDM Folds that	will be used as demo	graphics in Lyris:			
Flease st	erect th	e crustineus unac	the be used as define				
Info Com	Area apany (FI)					×
Info Com	Area apany (Q			Field Type	ŏ
Info Com	Area npany (rch Fiel No.	FI) d Name				Field Type Catalog	
Info Com Sear	Area npany (rch Fiel No.	FI) d Name Field Name					
Info Com Sear	Area pany (rch Fiel No. 31 32	FI) d Name Field Name Sector 3				Catalog	0

7. The rest of the steps to transfer the target to Lyris from the standard editor is similar to the way the target group is transferred from the Campaign Designer. Perform the steps 3 to 12 as described in the topic Transferring from the Campaign designer on page 647.

The remaining sections in this chapter talk about the effect of making changes to the target group in Aurea CRM and the corresponding changes in Lyris.

Adding or Deleting member(s) from a Target group

When you add a member to or delete a member from a target group that is already transferred to Lyris, a corresponding member entity is added or deleted from the corresponding mailing list on Lyris.

Adding a member to the target group

In the screenshots below, a fourth member is added to the target group and the corresponding change in Lyris is shown.

			R _q Edit	Target Group				
Edit Target	Group	Campaign Event 2 Starts on 05/26/2 Ends on 06/16/2	016		Type Simple Status In Progress		p. Rep ID arget gr	20
Max. 15 🗸	Company Rep ID + Add more records per page	9 <u>4</u> V		Last Name Inactive ? With me		Start Search		
Search R	esults	Set Inactive 🗙 Delete 💄	Add Person	🚨 Add Person in (Company 💄 Add	Contact Person 🗒 Add C	ompany 🗸 🔣 🗸 🗄	🗱 Modify List Fields
1 0	Company	Person	Rep ID		Response	Generated	Inacti Executed	Lyris Contact
		Travis Conner	Super User					
1	Tonzone1		Super User					lyris
4 al	Stancare	Luz Yates	Super User					tyris
		Marie Cole	Super User					lyris

As visible in the screenshot above, a new member (Travis Conners) is added to the target group. The user is automatically added to the corresponding mailing list participants on Lyris, as shown in the screenshot below.

			-		
	SEARCH	FIND		UNSUBSCRIBE	
ctive Members	Proof List Unsubscribed Bo	unced Admin Trash	All Trashed		Configure D
members					
Profile	Email	First Name	Last Name	Address	Company Name
	annete_cole_new@example.com	Marie	Cole	Glenwood Avenue	
				Grove Avenue	Tonzone1
۵.	info@tonzone.com				
	info@tonzone.com luz_yates@stancare.com	Luz	Yates	9236 Hudson Street	Stancare

As you can see the new person is added to the list of active participants in the corresponding mailing list.

Deleting a member from the target group

If you delete a member from the target group on Aurea CRM, the corresponding mailing list member in Lyris is moved from **Active members** to the **Admin Trash** list.

	Delete						
PE.							lyris
- C	Stancare Set Inactive	Luz Yates	Super User				lyris
	Tonzone1		Super User				lyris
		Travis Conner	Super User				lyris
1	Company	Person	Rep ID	Response	Generated	Inacti Executed	Lyris Contact

Member Marie Cole is deleted from the target group.

CRM-Event (x000000	54000001c)					Jun 07, 2016 ?	User Guide	Contact Support	Logo
Member Reco	rds » View Records	8							
		SEARCH	RASHED ADDRES	SES		FIND			
Active Members	Proof List Un	subscribed	Bounced	Admin Trash	All Trashed			Con	figure Dis
1 members									
Profile	Email			First Name	Last Name	Address		Company Name	
	annete_cole_new	@example.com		Marie	Cole	Glenwood Aven	Je		
🗉 🔍 🌖									

Member Marie Cole is moved from Active Members list to Admin Trash list.

Activating or deactivating a target group entity

Deactivating a target group member in Aurea CRM, moves the corresponding member record to the unsubscribed list in Lyris. The following screenshot shows the person entity (Travis Conners) deactivated (**Inactive**) in **Edit Target Group** window.

		🖧 Edit Target G	roup		· 기
Edit Target Group	Campaign Event 2 Starts on 05/26/2 Ends on 06/16/2	2016	Type Simple Status In Progress	Resp. Rep ID s Edit target gr	
Company Rep ID + Add more Max. 15 • records per page	88 V		me 2 me	Start Search	
Search Results	Set Inactive 🗙 Delete 🛔	Add Person 💄 Add F	Person in Company 🙎 Add	Contact Person 🖩 Add Company	🗸 🚺 🗸 🛱 Modify List Fields
Company	Person	Rep ID	Response	Generated Inacti	Executed Lyris Contact
		Super User		⊻	tyris
Tonzone1		Super User			lyris
Stancare	Luz Yates	Super User			tyris
	Marie Cole	Super User			lyris

The corresponding entity is now moved to the unsubscribed list of member records in Lyris.

CRM-Event (x000000640000001c)			Jun 07, 2016 ? User Guide	e Contact Support 🔒 Logout
Member Records > View Records				
SEARCH TRASHED ADDRE	SSES		FIND	
Active Members Proof List Unsubscribed Bounced	Admin Trash	All Trashed		Configure Display
1 members				
1 members Profile Email	First Name	Last Name	Address	Company Name
	First Name Travis	Last Name Conner	Address 8140 Garfield Avenue	Company Name
Profile Email				Company Name
Profile Email				Company Name

Similarly, activating an inactive member in the **Edit Target Group** window, moves the member record in Lyris from the **Unsubscribed** list to the **Active Members** list.

Changing the attributes of a target group entity

If the attribute of a target group member already transferred to Lyris is changed, the changes are automatically transferred to Lyris.

In the following screenshots the last name of person entity Conner is changed to Smith, and his email id is changed to the same is reflected in Lyris.

						< ~
vis Smith						
u 🖉 Edit 🗸 Save 🙆 Cancel 🗍	N Ro Select Affiliates					
1 2 content 1 2	g · @ select Animotes					
Form of address	~	Street	8140 Garfield Avenue		Photo	Q
First Name Travis		Postal Code				
Last Name Smith		City	Berlin			
Acad. Title	~	Country	Germany	+ ~		
E-mail travis_conner_new	example.com 🖂	Private Tel.		C		
Date of Birth MM/DD/YYYY	~	Private mobile tel.		e,		
Language	+ ~	Nationality		+ ~		
Rep ID	- <u>8</u>	Office Rep ID		91		
ABC	1	Lead Status	Cold	~	LinkedIn	6
					Xing	÷
					Twitter	٢
					Google+	Ð
					Facebook	•

The corresponding changes to the member record in Lyris is shown in the screenshot below.

	SEARCH	FIND		UNSUBSCRIBE	
					2
tive Members	Proof List Unsubscribed Bou	nced Admin Trash	All Trashed		Configure Disp
members			Pla Hashed		
Profile	Email	First Name	Last Name	Address	Company Name
	info@tonzone.com			Grove Avenue	Tonzone1
🔍 🌛					
	luz_yates@stancare.com	Luz	Yates	9236 Hudson Street	Stancare

Transferring from the Campaign designer

To transfer a target group for a marketing activity to CRM designer:

1. Open the marketing activity in the campaign designer.



2. Click in the Target Group row. The Transfer Target Group to Lyris page displays.

				sfer Target Group To Lyr	15		
	er Tai To Ly	rget	ck CRM Fields	Map CRM fields	Create Segment	ov	erview
lyris							
	elect th	e CRM fields that	will be used as dem	rographics in Lyris:			
Info Com	Area	FI)		nographics in Lyris:			, o
Info Com	Area		will be used as dem	nographics in Lyris:		Field Type	ŏ
Info Com	Area apany (I rch Field	FI) d Name		rographics in Lyris:		Field Type Catalog	
Info Com Sear	Area npany (I rch Fiek No.	FI) d Name Field Name		ographics in Lyris:			
Info Com Sear	Area npany (i rch Field No. 31 32	FI) d Name Field Name Sector 3		ographics in Lyris:		Catalog	

- **3.** Click the Pick CRM Fields tab. To select the required CRM fields to be included as attributes for the contacts in the target group, perform the following:
 - a. Select the required Infoarea from the Info Area dropdown list.
 - b. Click the check box to select the required field from each infoarea. You can search for specific fields by typing the field name in the Search Field Name filter. You can sort the displayed fields by name or type by clicking the respective field headers: Field Name or Field Type.
 - c. Repeat the above steps to select the required fields from different infoareas.

The following fields from the infoareas are not displayed:

- The SeqNo, and StatNo fields.
- The fields for which the user does not have view rights.
- The fields containing email addresses. They are automatically transferred.
- 4. Click Proceed. The Map CRM fields tab gets activated and the following message displays: Please wait until the mappings between CRM fields and Lyris demographic mappings are loaded...

Aurea CRM communicates with Lyris server to retrieve the corresponding Lyris demographics and displays the mapping table.

To map the CRM fields listed in the table with the retrieved Lyris demographics, perform the following:

a. Click in the Lyris Demographics column to display the list of demographics retrieved from the Lyris server and select the appropriate demographic for each of the listed CRM field. The demographics listed available are the ones that are compatible with the CRM field based on the CRM Field type. See the screenshot below:

		Transfer Target Group To Lyris	
ransfer Targe roup To Lyris	et	Create Segment	
lyris			
lease, select the L	yris demographics	s that each of the CRM fields below will be mapped to:	
CRM Field	Info Area	Lyris Demographic	
Last Name	Person (PE)	CRM.LastName	+ ~
First Name	Person (PE)	Ι	+ ^
Country	Person (PE)	CRM.ActivityExecutionId	
Date of Birth	Person (PE)	CRM.City	_
Private customer	Person (PE)	CRM.FirstName CRM.LastName	
	,	CRM.LastName-Demo	- 1
		CRM.PrivateTel	
		CRM.Test	
		CRM-Division	
		CRM-Division1	
		COM Division 2	
		CRM-Division2	
		CRM-Division2 CRM-Division4 CRM-Division-5	

If you cannot find an appropriate Lyris demographic for the CRM field, you can create a new Lyris demographic. See the next step.

- b. To create a new demographic, perform the following:
 - a. Click +. The Create new demographic dialog displays.
 - b. Enter a name for the demographic. A suggested name (name of the corresponding CRM field) is displayed for the demographic to be created in the Name textbox. You can also specify a name according to your preference.

c. Select the type of the demographic from the Type field.

In the screenshot below a new demographic for the field private customer is created. It is named CRM.PrivateCustomer and the type selected is a Checkbox.

		Transfer Target Gro	oup To Lyris	
ransfer Target Group To Lyris	Pick CRM Fields	Map CRM fie	Ids Create Segment Overvie	IW S
lyris Please, select the Lyr	ris demographics that each o	of the CRM fields below v	vill be mapped to: Create new demographic	×
Last Name	Person (PE)	CRM.LastName		+ ~
First Name	Person (PE)	CRM.FirstName	lyris	+ ~
Country	Person (PE)	CRM.Country1		+ ~
Date of Birth	Person (PE)	CRM.DateOfBirth	EcoGreenInc-NewProductLaunchEvent	+ ~
Private customer	Person (PE)		Name: CRM.PrivateCustomer	+ ~
			Type: Checkbox	~

- d. Click OK. The new demographic is created in Lyris.
- e. To view the mapped demographic attributes in Lyris, open Attributes tab and select the required mailing list from the List filter. The Attribute column should show the list of mapped attributes from CRM. See the screenshot below.

lyr	is <mark>HQ</mark>				н	Pradeep Kumar. <u>opstest</u> ~	Settings Help Logoff
-	Email Marketing	Dashboard Attribute	0+				
	Lists	Email Marketing - Attributes					Options II.
۹	Attributes					• 4	dd 🖉 Edit 💢 Disable
20	Contacts	List: EcoGreenInc-NewProductL v					9
¢	Segments	Attribute				Туре	D
•	Campaigns & Messages						IU II
ian.	Reports	Email CRM.PrivateCustomer				Text Checkbox	0
_							32002
۲	Email Test Overview	CRM.LastName				Text	31981
	Asset Library	CRM.FirstName				Text	31990
_		CRM.DateOfBirth				Date	31982
습	Launch EmailLabs	CRM.Country1				Select List	31978

- 5. Click Proceed. The Create Segment tab displays.
- 6. Click Create Segment. A segment for this mailing list is created in Lyris.

The name of the segment created in Lyris is displayed. Clicking the named URL opens the required Lyris segment in a new tab. The name generated is a concatenation of the name and the record id of the marketing activity.

	Tr	ansfer Target Group To	Lyris	
Transfer Target Group To Lyris	Pick CRM Fields	Map CRM fields	Create Segment	
Lyris Segment exists in Lyris: <u>Invitation x000000610000022b</u> Create Segment Segment was created in Lyris. Please click on button 'Proceed' belo	w to proceed to next step.			

When the segment for this target group is created in Lyris, it generates the Segment generated event. You can view the segment information in the Segment tab of the Edit/View Target group window.

7. Click Proceed. The Overview tab displays.



The number of active target group entities that are eligible to be transferred to Lyris is mentioned.

Note: If there are no target group entities for the email channel available to be transferred to Lyris, then a message "*No target group entities are eligible to be transferred to Lyris*" is displayed. You should go back and create the target group.

- 8. Click Proceed. The Schedule Transfer tab displays.
- **9.** Click Schedule Target Group Transfer. A tick mark appears signifying that the transfer process is scheduled.

Transfer Target Group To Lyris							
Transfer Target Group To Lyris	Pick CRM Fields	Map CRM fields	Create Segment	Overview	Schedule Transfer		
Lyris Transfer of target group to Lyris has been scheduled. Schedule Target Group Transfer							

10.To check the status of the transfer, open the Collaboration > To-Dos menu and search for the required scheduled activity. The status of the scheduled transfer should be visible. The following screenshot shows the status of the transfer is In Progress.

Crm	⊖ Campaign	Designer / Campaign 🗵	📓 Search To-Dos	¢		
ĭ 1 ₪	Search To	D-DOS Rep/Group ID <u>Super Use</u> Due on <u>MN/DD///</u> + Add more records per page		*	Type Add a value Status Add a value With me	v v Start Search
Û	Search R					
		Due on	Туре		Status	Subject
·	∎∃ ~	03/22/2017	Calculate	Ð	In Progress	
2		03/22/2017	Calculate	0	Completed	
		03/22/2017	Calculate		Completed	
80		03/22/2017	Calculate		Completed	
~		02/22/2017	Caleslate		Completed	

The transfer status changes to Completed, once the target group is transferred successfully.

11.To view the details of the transfer process, open the scheduled entity from the To-Do search list. The Related Data tab contains a link to a text file that contains information about the target group transfer process.

Crm	🐵 Campaign Designer / Campaign 🛛 📓 To-Do - Calculate 🐋		
2	B To-Do - Calculate ≣ Menu		
	Rep/Group ID Super User Type Calculate Link <u>0.07/27/2017 3:09 pm</u> Subject Details Due on 03/22/2017 Starts on 03/22/2017 Ends on 03/22/2017 Ends on 03/22/2017 Duration		
80	Related Data Document Links × Inte Inte Inte Inte Inte	Keyword	Size (bytes) 155

Open the document to find the information on the transfer process.

2017.03.22 16:09:40 Successfully transferred in chunk: 2 2017.03.22 16:09:40 Not transferred in chunk: 0 2017.03.22 16:09:40 Target groups in chunk: 2 2017.03.22 16:09:40 Chunk size: 10 2017.03.22 16:09:40 Chunk size: 10 2017.03.22 16:09:40 ErrorMessage: 2017.03.22 16:09:40 ErrorMessage: 2017.03.22 16:09:40 ErrorMessage:		16:09:40	Result: Success	
2017.03.22 16:09:40 Tanget groups in chunk: 2 2017.03.22 16:09:40 Chunk size: 10 2017.03.22 16:09:40 Tanget groups left to transfer: 2 2017.03.22 16:09:40 ErrorWessage:	2017.03.22	16:09:40	Successfully transferred in chunk: 2	
2817.03.22 16:09:40 Chunk size: 10 2017.03.22 16:09:40 Tanget groups left to transfer: 2 2017.03.22 16:09:40 ErnorMessage:	017.03.22	16:09:40	Not transferred in chunk: 0	
2017.03.22 16:09:40 Target groups left to transfer: 2 2017.03.22 16:09:40 ErrorMessage:	017.03.22	16:09:40	Target groups in chunk: 2	
2017.03.22 16:09:40 ErronMessage:	017.03.22	16:09:40	Chunk size: 10	
	017.03.22	16:09:40	Target groups left to transfer: 2	
2017.03.22 16:09:40 Engans count: 0	017.03.22	16:09:40	ErronMessage:	
	2017.03.22	16:09:40	Errors count: 0	

- 12.You can check the contacts created in Lyris for the transferred target group members. To list the contacts in Lyris and view the contact details created, perform the following:
 - a. Open the Contacts tab and select the mailing list from the List filter. The contacts created for his mailing list is displayed.



b. Click View to open the details of the contact generated. The View Contacts dialog displays.

			Attributes		
Email:	johnsnith1@aurea.com		First Name	John D	
			Last Name	Smith	
Status:	O Active		CRM.ActivityExecutionId	x000000640000022b	
	Proof Contact		CRM.Country	Deutschland	(v)
Added: Mar 22, 2017 7:00 AM			CRM.DateOfBirth	01/03/17	
			CRM.PrivateCustomer		
			Last Name-Demo		
Email Hist	bry			Sert	Opened OlickThru
Email Hist Email Sul	bry bject Line	Message	Name	Sert	Opened ClickThru Sent
			Name No Data Av No Results Found		

The field values of the mapped fields are transferred from CRM and populated in the corresponding mapped demographics in Lyris

Transferring from the Standard Editor

If you prefer to use the standard editor for creating marketing activities instead of the Campaign Designer, you can still transfer a marketing activity to Lyris from the standard editor.

To transfer a marketing activity from the standard editor to Lyris, perform the following:

- 1. Select Marketing > Marketing Activities from the CRM menu. The Search Marketing activities page displays.
- 2. Enter the search filters and click Start Search. The search results list displays.
- 3. Open the context menu of the required marketing activity from the result list and select **Tab View** or **Tree View**. The **Marketing Activity window** displays.

					۲.	~	>
Marketing Activity Inivitation, Variation							
Edit 🗸 Save ⊘ Cancel 🖩 Calcula	te 🖧 Create target group	>> Start Marketing Activity Transfer Targe	et Group To Lyris 📙 🗱 🗃				
Marketing Activity Inivitation							
Starts on 05/25/2016			Ends on 05/28/2016				
Variant			Resp. Rep ID Super User				
Level			Sales Cycle				
Marketing Activity Details Extras							_
Status Scheduled			Туре				
Execution status			Campaign starts on				
Campaign status Scheduled			Campaign ends on				
Event Location							
Text							
							_
Parent Data Related Data						100	~ =
Graph × Target Group × Responses × Re	os × Activities × Mai	lings × Work Orders × Execution ×	Statistics X Document Links				
🗒 Add Company 🚨 Add Perso	n in Company 💄 Add Pers	ion 💄 Add Contact Person 🌟 Add from 1	Company Favorites 🔺 Add Person in	Company from Favorites	Add from Per	son Favori	tes
						y All Reco	
d Company	Person	Rep ID	Marketing Activity	Response	Inact	ive Gene	ra
Company Super User	Person Super User	Super User	Inivitation				_

Note: Double clicking a marketing activity from the result list opens the marketing activity in the campaign designer.

- 4. Select Related Data > Target Group tab.
- 5. If there are no items listed in the Target Group Tab, click on the **Create Target Group** link.
- 6. Once your target group is defined, click the Transfer Target Group to Lyris link. The Transfer Target Group to Lyris page displays.



7. The rest of the steps to transfer the target to Lyris from the standard editor is similar to the way the target group is transferred from the Campaign Designer. Perform the steps 3 to 12 as described in the topic Transferring from the Campaign designer on page 647.

The remaining sections in this chapter talk about the effect of making changes to the target group in Aurea CRM and the corresponding changes in Lyris.

Adding or Deleting member(s) from a Target group

When you add a member to or delete a member from a target group that is already transferred to Lyris, a corresponding member entity is added or deleted from the corresponding mailing list on Lyris.

Adding a member to the target group

In the screenshots below, a fourth member is added to the target group and the corresponding change in Lyris is shown.

			R _q Edit	t Target Group				
Edit Target	t Group	Campaign Eve Starts on 05/ Ends on 06/	26/2016		Type Simple Status In Progres		. Rep ID irget gr	200
Max. 15 🗸	Company Rep ID + Add more records per page		90 >	Last Name Inactive ? With me		Start Search		
Search R	lesults	Set Inactive 🔀 Delete	🙎 Add Person	🚨 Add Person in	Company 💄 Add	Contact Person 🗒 Add Co	mpany 🗸 🕅 🗸	🕼 Modify List Fields
1	Company	Person	Rep ID		Response	Generated	Inacti Executed	Lyris Contact
		Travis Conner	Super User					
	Tonzone1		Super User					lyris
1	Stancare	Luz Yates	Super User					lyris
		Marie Cole	Super User					lyris
1								

As visible in the screenshot above, a new member (Travis Conners) is added to the target group. The user is automatically added to the corresponding mailing list participants on Lyris, as shown in the screenshot below.

- Member 1	Records . View Records		-		
	SEARCH	FIND		UNSUBSCRIBE	
					2
Active Members	Proof List Unsubscribed Bo	unced Admin Trash	All Trashed	1	Configure Di
members					
Profile	Email	First Name	Last Name	Address	Company Name
1 Torne					
	annete_cole_new@example.com	Marie	Cole	Glenwood Avenue	
	annete_cole_new@example.com info@tonzone.com	Marie	Cole	Glenwood Avenue Grove Avenue	Tonzone1
۵ 💭		Marie Luz	Cole Yates		Tonzone1 Stancare

As you can see the new person is added to the list of active participants in the corresponding mailing list.

Deleting a member from the target group

If you delete a member from the target group on Aurea CRM, the corresponding mailing list member in Lyris is moved from **Active members** to the **Admin Trash** list.

1	Company	Person	Rep ID	Response	Generated	Inacti Executed	Lyris Contact
		Travis Conner	Super User				lyris
	Tonzone1		Super User				tyris
	Stancare	Luz Yates	Super User				lyris
	Set Inactive	Marie Cole	Super User				lyris
_	× Deigte	1					

Member Marie Cole is deleted from the target group.

CRM-Event (x000000640000001c)	Jun 07, 2016 🕐 User Guide Contact Support 🔒 Logout
Wember Records >> View Records	
SEARCH TRASHED ADDRESSES	FIND
	21. E
Active Members Proof List Unsubscribed Bounced Admin Trash All Trashe	Configure Display
1 members	
Profile Email First Name Las	t Name Address Company Name
🔲 🔲 annete_cole_new@example.com Marie Cole	Glenwood Avenue
RESTORE CHECKED DELETE CHECKED	
Select All De-select All	

Member Marie Cole is moved from Active Members list to Admin Trash list.

Activating or deactivating a target group entity

Deactivating a target group member in Aurea CRM, moves the corresponding member record to the unsubscribed list in Lyris. The following screenshot shows the person entity (Travis Conners) deactivated (**Inactive**) in **Edit Target Group** window.

		🖧 Edit Target (Group			
dit Target Group	Campaign Eve Starts on 05/ Ends on 06/	26/2016	Type Simple Status In Progre		Rep ID get gr	
Company Rep ID + Add more Max. 15 • records per page		-	lame ctive ? h me	Start Search		
Search Results	Set Inactive 🗙 Delete	e 🚊 Add Person 💄 Add	Person in Company 💄 Ad	d Contact Person 🖩 Add Cor	npany 🗸 🗐 🗸 🛱	Modify List Field
Company	Person	Rep ID	Response	Generated	Inacti Executed	Lyris Contact
₽ = ×	Travis Conner	Super User			Z	lyris
		Super User				lyris
Tonzone1		Super Oser				Guis
Tonzone1 Stancare	Luz Yates	Super User				lyris

The corresponding entity is now moved to the unsubscribed list of member records in Lyris.

R CRM-Event (x000000640000001c)			Jun 07, 2016 ? User Guid	e Contact Support 🔒 Logout
Wember Records ▹ View Records				
SEARCH TRASHED ADDRE	SSES		FIND	
				2
Active Members Proof List Unsubscribed Bounced	Admin Trash	All Trashed		Configure Display
1 members				
Profile Email	First Name	Last Name	Address	Company Name
🔲 🔲 travis_conner@example]com	Travis	Conner	8140 Garfield Avenue	
RESTORE CHECKED DELETE CHECKED				
Select All De-select All				

Similarly, activating an inactive member in the **Edit Target Group** window, moves the member record in Lyris from the **Unsubscribed** list to the **Active Members** list.

Changing the attributes of a target group entity

If the attribute of a target group member already transferred to Lyris is changed, the changes are automatically transferred to Lyris.

In the following screenshots the last name of person entity Conner is changed to Smith, and his email id is changed to the same is reflected in Lyris.

							< ×
avis Smith							
nu 🖉 Edit 🗸 S	ave 🥝 Cancel 🚊 🛩 🎭 Select Affili	ates					
Form of address		~	Street	8140 Garfield Avenue		Photo	۹
First Name	Travis		Postal Code	12345			
Last Name	Smith		City	Berlin			
Acad. Title		~	Country	Germany	+ ~		
E-mail	travis_conner_new@example.com	\times	Private Tel.		C		
Date of Birth	MM/DD/YYYY	~	Private mobile tel.		e.		
Language		+ ~	Nationality		+ ~		
Rep ID	T	9	Office Rep ID		91		
ABC	1		Lead Status	Cold	~	LinkedIn	۲
						Xing	© ©
						Twitter	٢
						Google+	
						Facebook	۲

The corresponding changes to the member record in Lyris is shown in the screenshot below.

CRM-Event (x000	0000640000001c)			Jun 07, 2016 ? User Guide	Contact Support
Wember R	ecords » View Records	FIND		UNSUBSCRIBE	
)			Configure Display
Active Members	Proof List Unsubscribed Bou	inced Admin Trash	All Trashed		
3 members					
Profile	Email	First Name	Last Name	Address	Company Name
🔍 🤌	info@tonzone.com			Grove Avenue	Tonzone1
🔍 🍠	luz_yates@stancare.com	Luz	Yates	9236 Hudson Street	Stancare
۵ 🔁	bavis_conner_new@example.com	Travis	Smith	8140 Garfield Avenue	
E					

Viewing/Editing the Lyris Segment Details

When a target group is transferred to Lyris a segment definition is created in Lyris. It contains the list of contacts that correspond to the target group members of the marketing activity in Aurea CRM. When the segment is generated in Lyris, the actual email messages are created and sent to each of the target group members. To use an analogy, a segment is like a database query and segment generation is similar to executing the database query that generates the result set of records. The list of contacts for a segment can be edited and updated in Lyris.

When Lyris generates a segment, Aurea CRM on receiving the segment generation event stores the event data in the Segment Compact (EG) infoarea records.

To view the Segment information in Aurea CRM, perform the following:

- 1. Open the required Campaign containing the marketing activity container.
- 2. Click the Edit Marketing activity's target group () icon. The Target groups and Segment contacts page displays.
- 3. Click the Lyris Segment tab.

	Target groups and Segment conta	acts
Campaign Final Demo Campaign		
Starts on 2017-07-01	Type FinalDemoCampaign	Resp. Rep ID
Ends on 2017-07-31	Status Scheduled	Edit target group until
Target groups Lyris segment		
View segment contacts		
C Refresh		
Email	Trashed 2	
Matched 2		
+ Add more	~	
Max. 15 Y records per page	Start	t Search
Search Results		
	Trashed	Matched
		×
marek.grabka@aurea.com		*
marek.grabka@aurea.com demo2@test.com		~

4. ClickStartSearch

list of contacts in the segment generated in Lyris are displayed in the Search Results. If there are no results displayed for a segment that is generated in Lyris, click the Refresh button and the segment contacts are fetched from Lyris. If the state of a contact was set to Trashed in Lyris, the checkbox in the Trashed column is checked. The checkbox in the Matched column is checked when the email address of a target group member for the marketing activity in Aurea CRM, matches the Contacts email address.

5. Double click a Contact listed in the search result list. The EG info area record for the contact displays. The record is read only and cannot be edited.

Note that the target group that contains the matching member with the same email id is displayed in the Related Data section. Also, these records are deleted and recreated every time the Refresh button is clicked in the Target groups and Segment contacts page.

Lyris Event notification – FSI only

This topic explains the Lyris Event notifications.

Aurea Campaign Manager sends the following event notifications when the Contact status of target group member changes:

- Trashed A target group member is set to Trashed state in the Aurea Campaign Manager.
- Bounced A target group member is set to Bounced state in the Aurea Campaign Manager.
- Unsubscribed A target group member unsubscribes in the Aurea Campaign Manager.
- Active A target group member is set to Active state in the Aurea Campaign Manager.

Aurea Campaign Manager sends the following event notifications on the status of the Email messages for a marketing activity:

- Email Sent When Aurea Campaign Manager sends the marketing email message to a target group member.
- Email Delivered When Aurea Campaign Manager delivers marketing activity email message to the inbox of a target group member.
- Email Opened When the target group member opens the email message for the marketing activity.
- Email Bounced When the email for a target group member could not be delivered for some reason.

Other event notifications from Aurea Campaign Manager:

- URL Click Event When a user clicks on a response URL link in a marketing activity email message.
- Update Boolean Field When the value of a property (demographic) of type Boolean (checkbox), of a target group member in the Aurea Campaign Manager is updated.
- Update Date Field When the value of a property (demographic), of type Date, of a target group member in the Aurea Campaign Manager is updated. For example, the **Date of Birth** value of a target group member in the Aurea Campaign Manager is updated.
- Update Text Field When the value of a property (demographic), of type text or text area, of a target group member in the Aurea Campaign Manager is updated. For example, the First Name value of a contact in the Aurea Campaign Manager is updated.
- Update Catalog field When the value of a property (demographic), of type Select List, of a target group member in the Aurea Campaign Manager is updated. For example, the **Country** field of a target group member in the Aurea Campaign Manager is updated.

The following topics describe how Aurea CRM handles each of the different event notifications:

Handling Contact Trashed event

When a target group member's status is set to Trashed in Lyris, a notification message is generated for the responsible Rep of the marketing activity. In the Edit/View target group page, the target group member is set to Inactive, and the checkbox is selected. See the screenshot below:

💿 Campaig	n Designer / Campaign								
	Target groups and Segment contacts								
	Campaign Campaign C1								
	Starts on 07/11/2017	Type Simple	Resp	Rep ID					
	Ends on 07/26/2017	Status Scheduled	Edit target g	roup u					
@ Camp	Target groups Lyris segment								
	View Target Group								
	Company		Last Name						
	Rep ID	2	Inactive ?						
	+ Add more	*	With me						
	Max. 15 👻 records per page			Start Search					
		Id Person 👗 Add Person in Compa	any 🚨 Add Contact Person 🕴 🗒 Add C						
	Company Person	Rep ID	Generated	Inact Executed					
	Ms. Bass	Edith Super Use	r						
				\bigcirc					

A pop up in the notification area indicates a new event message. A link to the marketing activity is provided in the Message Information page. The notification contains information about the CRM target group member that was set to Trashed status in the Aurea Campaign Manager. See the screenshot below:

Au	S Message Information	
₽	Message Information	
	Ξ Menu 🖉 Edit 🛩 Save ⊘ Cencel [L] Υ	
-	Rep/Group ID <u>Super User</u> Type Information	Assigned by Rep ID Super User
1 () I () 1	Message Lyris contact linked to marketing activity target group set to tras	hed.
	Generated on 07/07/2017	Generated at 02:34 pm
	Text Marketing activity (\rget group for Person Ms. Bass Edith-Stewar	t was set to inactive status as its linked Lyris contact status was updated to 'trashed'.
5	Archive	Assigned by Rep Group
	Link <u>Invitation</u>	

Handling Contact Active event

When an inactive (or trashed) target group member is set to Active in the Aurea Campaign Manager, a notification message is sent to the responsible rep of the marketing activity. In the Edit/View target group page, the target group member is set to active and the Inactive checkbox is unselected.

The Message Information page, contains a link to the marketing activity, it also contains the reasons for setting the target group to active, and the name of the target group member set to Active in the Aurea Campaign Manager.

Handling Contact Bounced event

When Aurea Campaign Manager changes the status of a contact to bounced, the event is received by Aurea CRM and it executes a predefined named trigger. You can define the trigger logic based on your business requirements. For example, a trigger can be executed to set the inactive field to true for bounced target group member.

To set up the required trigger, contact your Aurea CRM System administrator.

Handling Contact Unsubscribed Event

When Lyris changes the status of a contact to Unsubscribed, the event is received by Aurea CRM and it executes a predefined named trigger. You can define the trigger logic based on your business requirements.

To set up the required trigger, contact your Aurea CRM System administrator.

Handling Email Marketing Message Deleted Event

When an Email marketing message is deleted from Lyris, the event is received by Aurea CRM and it executes a predefined named trigger. You can define the trigger logic based on your business requirements. For example, a trigger can be executed to clear the Email properties in Aurea CRM. To set up the required trigger, contact your Aurea CRM System administrator.

A notification message informs the responsible Rep for the marketing activity of the message deletion in the Aurea Campaign Manager. Also, the Create in Lyris button is deactivated and visible in the Define Format tab of the Channel and Format definition page of the marketing activity, as shown in the screenshot below. If required, you can define and save the message format again, before saving it to Lyris.

Campaign Designer							
		Campaign Calendar Campaign Designer					
	Channel & Format Definition						
⊛ Campaign Fin	Channel & Format Definition	Define Channel(s) Define Format Default Values (Contact) Default Values (Mailing)					
	▼ Format Definition						
	Format Name	Internal_x000006400000006					
	v E-mail						
	lyris 🛕						
InalDemoMA	Create In Lyris (In order the transfer to Lyris to be possible, all the n	equired fields have to be completed)					
1. Channels 🤻	Lyris Hailing List E-mail: Send as	rek Grabka	+ •				
2. Target Group	E-mail from						
3. Execution	Subject						
4. Responses							

Handling events with faulty data

Sometimes information received from Aurea Campaign Manager might be faulty and Aurea CRM is unable to perform further processing. Such events are presented as tasks to the Rep responsible for the corresponding marketing activity whose event data could not be processed by Aurea CRM. This enables the Rep to identify the issue and update the proper records manually. All the tasks set up for a Rep can be viewed in the Person, Person Company info areas. In the screenshot below, the Task tab shows all the tasks assigned to the Rep in the Related Data section.

🛢 Task Automatic update of PE record due to	≚ 🚨 Ms. Bass E	dith-Stewart			
& Ms. Bass Edith-Stewart					
🗏 Menu 🖉 Edit 🗸 Save ⊘ Cancel 🖺 🗸 I	🕤 Select Affiliates				
Name Ms. Bass Edith-Stewart		Addre	. Switzerland		
E-mail edith_bass@aurea.com		Private T	el.		
Date of Birth 11/01/2000		Private mobile t	el.		
Language		National	ity		
Rep ID		Office Rep	ID		
ABC		Lead Stat	tus Cold		
Private customer 🗹					
Related Data					
Activities × Tickets × Task × Map ×	Contact Times X				
	contact nines ~				
Rep ID	Status	Priority	Due on	Due at	S
Super User	Open	High			A

Events generated with invalid data also generate appropriate log messages that are useful in understanding the type of invalid data and provide meaningful clues about the fault. Some of the invalid data scenarios are listed below:

- Invalid Message ID
- Invalid Mailing list ID
- Click events generated by recipients who are not members of Aurea CRM.

To illustrate this lets consider a scenario where the contact's demographics property country is updated. This demographics property in the Aurea Campaign Manager is mapped to the field land and its value needs to be selected from a catalog. The Contact's information cannot be updated by Aurea CRM in the Person (PE) info area record, if the new country value is not present in the CRM catalog.

To handle such events, perform the following steps:

- 1. Select Collaboration () à Tasks from the main menu. The Search Task page opens.
- 2. Set the required filter criteria and click Start Search. The search results display.

Search T	ask									\$
	Rep ID	Alex				2	St	tatus Add a val	Je	
	Due on	MM/DD/Y	YYY			~	Pri	ority Add a valu		
	Subject									
	+	Add more	·			~	With	h me 🗌		
lax. 15 ¥	records p	er page								Start Search
Search R	Results									+ XI ~ +
jî .	Rep ID	Status	Priority	Due on	Due at	Subject				
			High					Record due to L		

3. Double click on the task. The task page displays.



The Subject field provides the information about the failed attempt to update the Person record.

4. Click the Details tab. You can find more information about the reasons for the failed activity. Which should inform you about the subsequent actions to take.

📄 Task Automatic update of PE Reco	ord due to	Q- Search
		< 🗸
Task Automatic update of	PE Record due to Lyris Contact update, failed.	
🗮 Menu 🛛 🖉 Edit 🗸 Save 🥝 Cano	el 🛛 🔟 🗸 👌 Hierarchy Tree	
Rep ID Alex	Created by Rep ID Alex	
Туре	Status Open	
Subject Automatic up	date of PE Record due to Lyris Contact update, failed.	
Link		
Appointments Details		
Priority High	Private	
Single Task	Subtask	
Predecessor Task	A1_1_SerNo	
Participant ID Required	Alex	
Optional		
For Information		
Text Failed to upda	ate field Land of PE record with value Greece communicated by Lyris S	ync Middleware.

In the screenshot above, from the information provided in the Text field you can conclude that the catalog needs to be updated with the new country name. And then the person record needs to be updated with the new country field.

Handling Contact Trashed event

When a target group member's status is set to Trashed in Lyris, a notification message is generated for the responsible Rep of the marketing activity. In the Edit/View target group page, the target group member is set to Inactive, and the checkbox is selected. See the screenshot below:

🔘 Campaig	n Designer / Campaign			
		Target groups and Segment conta	acts	
	Campaign Campaign C1			
	Starts on 07/11/2017	Type Simple	Resp. Rep ID	
	Ends on 07/26/2017	Status Scheduled	Edit target group u	
	Target groups Lyris segment			
	View Target Group			
	Company	Last Nar	me	
	Rep ID	2 Inact	ive ?	
	+ Add more	✓ With	me	
	Max. 15 👻 records per page			Start Search
	Search Results Set Inactive × Delete 💄 Add Per	rson 💄 Add Person in Company 💄 Add	d Contact Person 🗐 Add Company	
	🖉 Company Person	Rep ID	Generated	Inact Executed
	Ms. Bass Edit	Super User		

A pop up in the notification area indicates a new event message. A link to the marketing activity is provided in the Message Information page. The notification contains information about the CRM target group member that was set to Trashed status in the Aurea Campaign Manager. See the screenshot below:

Au	S Message Information	
-	Message Information	
	Ξ Menu 🖉 Edit 🖋 Save ⊘ Cancel 🗋 Υ	
-	Rep/Group ID Super User	Assigned by Rep ID Super User
••	Type Information	
የ 🗦 😭 🛃 🗸	Message Lyris contact linked to marketing activity target group set to trashe	d.
	Generated on 07/07/2017	Generated at 02:34 pm
	Text Marketing activity great group for Person Ms. Bass Edith-Stewart w	vas set to inactive status as its linked Lyris contact status was updated to 'trashed'.
	- 0	
5	Archive	Assigned by Rep Group
~	Link Invitation	

Handling Contact Active event

When an inactive (or trashed) target group member is set to Active in the Aurea Campaign Manager, a notification message is sent to the responsible rep of the marketing activity. In the Edit/View target group page, the target group member is set to active and the Inactive checkbox is unselected.

The Message Information page, contains a link to the marketing activity, it also contains the reasons for setting the target group to active, and the name of the target group member set to Active in the Aurea Campaign Manager.

Handling Contact Bounced event

When Aurea Campaign Manager changes the status of a contact to bounced, the event is received by Aurea CRM and it executes a predefined named trigger. You can define the trigger logic based on your business requirements. For example, a trigger can be executed to set the inactive field to true for bounced target group member. To set up the required trigger, contact your Aurea CRM System administrator.

Handling Contact Unsubscribed Event

When Lyris changes the status of a contact to Unsubscribed, the event is received by Aurea CRM and it executes a predefined named trigger. You can define the trigger logic based on your business requirements. To set up the required trigger, contact your Aurea CRM System administrator.

Handling Email Marketing Message Deleted Event

When an Email marketing message is deleted from Lyris, the event is received by Aurea CRM and it executes a predefined named trigger. You can define the trigger logic based on your business requirements. For example, a trigger can be executed to clear the Email properties in Aurea CRM. To set up the required trigger, contact your Aurea CRM System administrator.

A notification message informs the responsible Rep for the marketing activity of the message deletion in the Aurea Campaign Manager. Also, the Create in Lyris button is deactivated and visible in the Define Format tab of the Channel and Format definition page of the marketing activity, as shown in the screenshot below. If required, you can define and save the message format again, before saving it to Lyris.

	Ciampaga Calendar Canayan Degan Channel R Format Definition							
	Channel & Format Definition	Define Channel(s) Define Format Default Values (Contact) Default Values (Mailing)						
	✓ Format Definition							
	Format Name	Internal_x00000640000006						
	*							
	E-mail							
	tyris 🛕							
• FinalDemoMd		se, at the regured fields have to be completed)						
FinalDemoMA	Create in Lyris (Chi doc) the transfer to Lyris to be possible by the transfer to Lyris to the Possible by the transfer to Lyris Halling Let (CMH - Possible CMH - Possible							
1. Channels	Course is (yrs) (On one transfer to (yrs to be possible Lyris fishing Lot) (OH - Fishing Lot) (yris fishing Lot) (OH - Fishing Lot) (-mail: Send an							
	Control In tyres (De novel the transfer to tyres to be possible Upen Maling Lie Constrol on tyres Constrol on tyres Cons							
1. Channels	Course is (yrs) (On one transfer to (yrs to be possible Lyris fishing Lot) (OH - Fishing Lot) (yris fishing Lot) (OH - Fishing Lot) (-mail: Send an							

Handling events with faulty data

Sometimes information received from Aurea Campaign Manager might be faulty and Aurea CRM is unable to perform further processing. Such events are presented as tasks to the Rep responsible for the corresponding marketing activity whose event data could not be processed by Aurea CRM. This enables the Rep to identify the issue and update the proper records manually. All the tasks set up for a Rep can be viewed in the Person, Person Company info areas. In the screenshot below, the Task tab shows all the tasks assigned to the Rep in the Related Data section.

🗎 Task Autom	natic update of PE record due to $ imes$	👗 Ms. Bass Ed	ith-Stewart			
	s Edith-Stewart Edit 🗸 Sava ⊘ Cancel 🖳 🗸 🇞	Select Affiliates				
	Name Ms. Bass Edith-Stewart		Addres	s . Switzerland		
0.0	E-mail <u>edith bass@aurea.com</u> te of Birth 11/01/2000		Private Te Private mobile te	l.		
	Language		Nationalit	У		
	Rep ID ABC		Office Rep II Lead Statu			
Private	customer 🗹					
Related D	Data					
Activities ×	Tickets X Task X Map X	Contact Times ×				
1	Rep ID	Status	Priority	Due on	Due at	S
	Super User	Open	High			A

Events generated with invalid data also generate appropriate log messages that are useful in understanding the type of invalid data and provide meaningful clues about the fault. Some of the invalid data scenarios are listed below:

- Invalid Message ID
- Invalid Mailing list ID
- Click events generated by recipients who are not members of Aurea CRM.

To illustrate this lets consider a scenario where the contact's demographics property country is updated. This demographics property in the Aurea Campaign Manager is mapped to the field land and its value needs to be selected from a catalog. The Contact's information cannot be updated by Aurea CRM in the Person (PE) info area record, if the new country value is not present in the CRM catalog.

To handle such events, perform the following steps:

- 1. Select Collaboration () à Tasks from the main menu. The Search Task page opens.
- 2. Set the required filter criteria and click Start Search. The search results display.

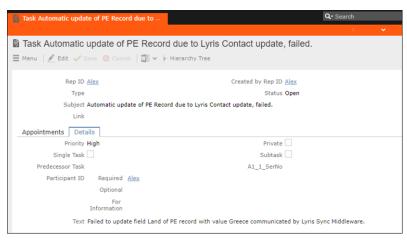
Search T	ask								\$
	Rep ID	Alex				9	Status Add a v	value	
	Due on	MM/DD/Y	YYY			~	Priority Add a v	value	
	Subject								
	+	Add more	·			~	With me		
1ax. 15 🗸	records pe	er page							Start Search
Search R	esults								+ XI ~ ;
1	Rep ID	Status	Priority	Due on	Due at	Subject			
	Alex	Open	High			Automaticu	odate of PE Record due t	o Lucio Contactu	undate failed

3. Double click on the task. The task page displays.

Task Automatic update of PE Record due to	Q- Search
	<
Task Automatic update of PE Record	I due to Lyris Contact update, failed.
🗏 Menu 🖉 Edit 🗸 Save ⊘ Cancel 🏧 🗸 🔆	Hierarchy Tree
Rep ID <u>Alex</u>	Created by Rep ID Alex
Туре	Status Open
Subject Automatic update of PE Recor	d due to Lyris Contact update, failed.
Link	
Appointments Details	
Create To-Do	Escalate To-Do
Due on	Due at
Completed on	Completed at
Starts on 07/07/2017	Starts at 09:51 am
Ends on	Ends at

The Subject field provides the information about the failed attempt to update the Person record.

4. Click the Details tab. You can find more information about the reasons for the failed activity. Which should inform you about the subsequent actions to take.



In the screenshot above, from the information provided in the Text field you can conclude that the catalog needs to be updated with the new country name. And then the person record needs to be updated with the new country field.

URLs for a Marketing Response – FSI only

You can configure the marketing activity messages to display links for each response type, that the recipients can click to record his/her response.

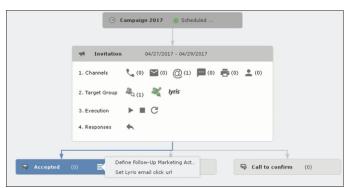
The steps described in the sections below, assume an example "Invitation" marketing activity. The expected response from the recipient is to 1. Accept the invitation, 2.Reject the invitation, or 3. Call to confirm. Each of the response to the marketing activity could be configured with a URL that correspond to a link that is presented to the recipients of the Invitation email message. In the steps described below, we set the response URL for the Accepted response.

Important: The corresponding email marketing message in the Aurea Campaign Manager should be edited to include the response links, and their URLs should match the values set in Aurea CRM exactly.

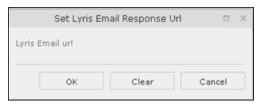
Specifying a Response URL from the Campaign Designer

To specify response URLs for a marketing activity from the Campaign Designer, perform the following steps:

1. Click \equiv in the Accepted response. The context menu displays.



2. Select Set Lyris Email Click URL. The dialog displays.



3. Enter the required Response URL. For example, http://www.aurea.com?response=Accepted.

Note: Use the Clear button to clear any long URL value set previously.

4. Click OK.

Specifying a Response URL from the Standard Editor

To specify response URLs for a marketing activity from the Standard Editor, perform the following steps:

- Select Marketing > Marketing Activities from the CRM menu. The Search Marketing activities page displays.
- 2. Enter the search filters and click Start Search. The search results list displays.
- 3. Open the context menu of the required marketing activity from the result list and select Tab View or Tree View. The Marketing Activity window displays.

Note: Double clicking a marketing activity from the result list opens the marketing activity in the campaign designer.

4. Click the Responses tab. The configured responses are listed.

Marketing	Activity Invitation,	Variation		
🗏 Menu 🛛 🖉 Ed	t 🖌 Save ⊘ Cancel	Calculate	$\bar{P}_{\rm Q}$ Create target group	>> Start Marketing Activity
	Marketing Activity In	uitation		
	Starts on 04			
		/2//201/		
	Variant			
	Level			
Marketing Act	ivity Details Extra	s		
	Status So	heduled		
	Execution status			
	Campaign status So	heduled		
	Event Location			
	Text			
Denvert Det	Dalata d Dala			
Parent Data	Related Data			
Graph 🔨 Ta	rget Group 🛛 🛛 Resp	onses 🛛 Rep	os 🛛 Activities 🖂 I	Mallings × Work Orders ×
				$\mathbf{\lambda}$
6	Marketing Activity		Response	Follow-up Mark
		վեղ		Pollow-up Mark
■ = ×	Invitation	0	Accepted	
	Invitation		Rejected	
	Invitation		Call to confirm	

5. Double click on any of the response to open it. The following screenshot shows the Rejected response.

🗟 Response Rejected	
🗏 Menu 🛃 Edit 🗸 Save 🥝 Cancel 🖳 🗸	,
Response Rejected	
Registration	
LyrisEmailResponseUrl	
Follow-up Marketing Activity Numbers & I	Points
Follow-up Marketing Activity	
Level (Follow-up Marketing Act.)	
Code (Follow-up Marketing Act.)	

6. Click Edit.

7. Enter the required URL for this response, in the LyrisEmailResponseURL field.

8. Click Save.

Handling URL Click Events

Aurea CRM marketing activity email messages generated by the Aurea Campaign Manager can contain response URL links to capture response from the target group members. When a recipient clicks on an URL, Aurea Campaign Manager generates an Email click event. On receiving the Email click event from the CRM Sync Middleware, Aurea CRM records the response in the Mailings (BR) info area record for the target group member, for each marketing activity. The response recorded in the Mailing record for the marketing activity is based on the URL received in the URL click even. The response URL found in the response event data should exactly match the value set in the URL response. If there is no match the response is ignored.

While the user can send different responses set for a marketing activity, an event is generated by the Aurea Campaign Manager only for the first response. Subsequent responses are ignored by the Aurea Campaign Manager.

Viewing the Responses in the Mailings Info Area

When a message recipient clicks on a response URL, the response is recorded in the Mailings info area. The user can click on multiple responses and they are recorded. A maximum of five responses per recipient can be recorded in the Mailing Info area. Using the same example scenario described for specifying the response URL, we assume that the recipient clicks on two response links for Accepted, and Call to confirm.

To view the response for a marketing activity, perform the following steps:

- 1. Select Marketing > Mailings from the CRM menu. The Search Mailings page displays.
- Enter the required search criteria and click Start Search. The search results displays.

Crm	Campaign Designer 🛛 🔛	Search Mailings 🛛							
	Search Mailings								
	Date			~	Marketing Activity			+ ~	
-	Result			~	Channel	Add a value		~	
44	+	Add more		~					
•	Max. 15 👻 records per pa	ge						Start Search	
Û	Search Results								
	2 Company		Person		Marketing A	ctivity	Level	Variant (Marketing Act.)	Date
1	up ≡ ×	Jm							04/27/2
3		0							

3. Double click on the required Mailing record from the Search Results list. The Mailing page for the target group member and the marketing activity opens.

Note: In the sample scenario the marketing activity was named Invitation and the Mailing page for this instance is named Mailing Invitation.

4. Click the Marketing Activity tab. The Responses from the target group member are listed in the Response 1 (Marketing Activity) field. This field can record up to five responses.

Mailing Invitation (04/27/2017)	
🚨 Ms. Dixie Watts	
Mailing Invitation (04/27/2017)	
🗮 Menu 🖋 Edit 🛹 Save 🖉 Cancel 🛄 🛩	
Company	
Person Ms. Dixie Watts	
Date 04/27/2017	Marketing Activity Invitation
General Marketing Activity	
Level	Variant (Marketing Act.)
Response 1 (Marketing Act.) Accepted , Call to confirm	
Parent Data	

In the sample scenario the user has clicked on two response URLs: Accepted and Call to confirm

Specifying a Response URL from the Campaign Designer

To specify response URLs for a marketing activity from the Campaign Designer, perform the following steps:

1. Click ≣in the Accepted response. The context menu displays.

	\ominus Campaign 2017 🛛 Scheduled
	Invitation 04/27/2017 - 04/29/2017
	1. Channels 📞 (0) 🔛 (0) @(1) 🔤 (0) 🚔 (0) 👱 (0)
	2. Target Group 🖧 (1) 🍇 lyris
	3. Execution 🕨 🔳 C
	4. Responses 🧄
¥.	
R Accepted	(0) E Define Follow-Up Marketing Act Set Lyris email click url Q Call to confirm (0)

2. Select Set Lyris Email Click URL. The dialog displays.

	Set Lyris Er	nail Response U	rl		×
Lyris Er	mail url				
	OK	Clear	Can	cel	

3. Enter the required Response URL. For example, http://www.aurea.com?response=Accepted. Note: Use the Clear button to clear any long URL value set previously.

4. Click OK.

Specifying a Response URL from the Standard Editor

To specify response URLs for a marketing activity from the Standard Editor, perform the following steps:

- 1. Select Marketing > Marketing Activities from the CRM menu. The Search Marketing activities page displays.
- 2. Enter the search filters and click Start Search. The search results list displays.
- 3. Open the context menu of the required marketing activity from the result list and select Tab View or Tree View. The Marketing Activity window displays.

Note: Double clicking a marketing activity from the result list opens the marketing activity in the campaign designer.

4. Click the Responses tab. The configured responses are listed.

 Marketing Activity Invitation, Variation 	
🗏 Menu 🗶 Edit 🛹 Save ⊘ Cancel 🗐 Calculate	$B_{\mathbf{Q}}$ Create target group \gg Start Marketing Activity \equiv
Marketing Activity Invitation	
Starts on 04/27/2017	
Variant	
Level	
Marketing Activity Details Extras	
Status Scheduled	
Execution status	
Campaign status Scheduled	
Event Location	
Text	
Parent Data Related Data	
Graph X Target Group X Responses X Re	ps × Activities × Manings × Work Orders ×
Marketing Activity	Response Follow-up Mark
	Accepted
Invitation	Rejected
Invitation	Call to confirm

 Double click on any of the response to open it. The following screenshot shows the Rejected response.

Response Rejected	
🗮 Menu 🛛 🛃 Edit 🖌 Save ⊘ Cancel	
Response R - mail Registration	ejected
LyrisEmailResponseUrl	bers & Points
Follow-up Marketing Activity	
Level (Follow-up Marketing Act.)	
Code (Follow-up Marketing Act.)	

- 6. Click Edit.
- 7. Enter the required URL for this response, in the LyrisEmailResponseURL field.
- 8. Click Save.

Handling URL Click Events

Aurea CRM marketing activity email messages generated by the Aurea Campaign Manager can contain response URL links to capture response from the target group members. When a recipient clicks on an URL, Aurea Campaign Manager generates an Email click event. On receiving the Email click event from the CRM Sync Middleware, Aurea CRM records the response in the Mailings (BR) info area record for the target group member, for each marketing activity. The response recorded in the Mailing record for the marketing activity is based on the URL received in the URL click even. The response URL found in the response event data should exactly match the value set in the URL response. If there is no match the response is ignored.

While the user can send different responses set for a marketing activity, an event is generated by the Aurea Campaign Manager only for the first response. Subsequent responses are ignored by the Aurea Campaign Manager.

Viewing the Responses in the Mailings Info Area

When a message recipient clicks on a response URL, the response is recorded in the Mailings info area. The user can click on multiple responses and they are recorded. A maximum of five responses per recipient can be recorded in the Mailing Info area. Using the same example scenario described for specifying the response URL, we assume that the recipient clicks on two response links for Accepted, and Call to confirm.

To view the response for a marketing activity, perform the following steps:

- Select Marketing > Mailings from the CRM menu. The Search Mailings page displays.
- Enter the required search criteria and click Start Search. The search results displays.



3. Double click on the required Mailing record from the Search Results list. The Mailing page for the target group member and the marketing activity opens.

Note: In the sample scenario the marketing activity was named Invitation and the Mailing page for this instance is named Mailing Invitation.

 Click the Marketing Activity tab. The Responses from the target group member are listed in the Response 1 (Marketing Activity) field. This field can record up to five responses.

Marketing Activity Invitation
Variant (Marketing Act.)

In the sample scenario the user has clicked on two response URLs: Accepted and Call to confirm

21 Events – LSI

Learn to plan and execute events.

Aurea CRM allows you to depict the thematic and organizational structure of events by adding events as campaigns and executing the following steps:

- Planning: Estimate the number of participants, select a venue and speakers and create a program, see Planning Events on page 779.
- Approval: The responsible persons verify and approve the event (regarding the budget/and or compliance), see Verifying and Approving Events on page 784.
- Execution: Generate the target group, add any necessary additional customers to the target group, send out invitations, administrate the participants and organize hotels, transfers etc., see Executing Events on page 786.
- Follow-up: You can evaluate the event and calculate the costs, see Rating Events on page 791 and Monitoring Event Costs on page 795.

For general information on campaigns and marketing activities, see Campaigns and Marketing Activities on page 516. Functions specific to events are described in the following sections.

Planning Events

Learn to plan events.

To plan an event:

- 1. Add a new campaign, see Adding Campaigns on page 520.
- 2. Enter yourself as the **Responsible** rep in the campaign (so that you receive any messages concerning the approval of the event).
- 3. Add the necessary marketing activities such as sending out invitations, the main event itself, mailings (for persons that cannot attend), and sending out brochures (for persons who did not attend), see Defining Marketing Activities on page 523.
- **4.** Add marketing activity responses to the activities and select the corresponding follow-up marketing activities for the responses.
- 5. The values in the **Registration** and **Participation Status** fields of marketing activity responses are used to manage the marketing activity's participants, see Managing Participants on page 790.
- 6. Enter the details of the hotels and venue, see Hotels and Venues on page 782.

- **7.** Enter information on any required equipment in the **Equipment** info area, see Adding Equipment on page 782.
- 8. Add the agenda, see Creating an Agenda on page 783.
- **9.** Select speakers and lecture topics, see Adding Lecture Subjects on page 783 and Adding Speakers on page 783.
- **10.**Create a query that returns the persons and accounts that should attend the event, see **Queries** on page 101. You can also add participants manually.
- 11.Switch to the marketing activity, select **New/Edit Execution** from the context menu and determine how the marketing activity should be executed, see **Defining** the Marketing Activity Format on page 536.
- 12Ask for quotes and enter the estimated costs of the event in the **Costs: Entire** event field of the campaign.
- **13.**Submit the event for approval. A message is sent to you once the event has been approved, see Requesting Approval/Verification on page 785.
- 14.Execute the event, see Executing Events on page 786.

Hotels and Venues

Add hotels, venues and other partners (e.g. catering, entertainment) as accounts in Aurea CRM and assign a company type (e.g. "Hotel").

Enter the corresponding account in the **Event Location** field in the marketing activity.

Adding Equipment

If your event requires special equipment not available at the venue, for example, you can enter information on the equipment.

- 1. Switch to the **Equipment** node in the campaign's tree view.
- 2. Click on \oplus (New).

New: Equipment					
 					
Equipment	Extra Seats	×			
Description	Seats for key n	ote speeches			
Quantity	100	Equipme	~		
Currency	EUR	×			
Costs		Costs (2C)			

- 3. Enter the equipment's details, such as the type, associated costs, quantity etc.
- 4. Click Save.

Adding Lecture Subjects

Add topics available for all events in the **Lecture Subject** info area.

To add a new lecture subject:

- 1. Select **Select** (Marketing) > Lecture Subjects.
- 2. Click on Start Search and then on \oplus (New).
- 3. Enter details on the topic, such as the field, duration and whether the topic represents a lecture or training subject.
- 4. Click Save.

Adding Speakers

Speakers need to be added to Aurea CRM as persons.

Assigning Lecture Subjects to Speakers

To assign a subject to a speaker:

- 1. Open the account tree view and switch to the Lecture Subjects node under the desired person.
- 2. Click on \oplus (New).
- 3. Select a lecture subject.
- 4. Save.

To assign a lecture subject to a speaker:

- 1. Select (Marketing) > Lecture Subjects.
- 2. Click on Start Search.
- 3. Open the desired lecture subject.
- 4. Click on \oplus (**New**) on the **Speakers** tab.
- 5. Select the desired person.
- 6. Click Save.

Creating an Agenda

You can add an agenda for each campaign representing an event or track. Add agenda items to the agenda, such as lectures, coffee and lunch breaks, entertainment etc.

To add an agenda item:

- 1. Switch to the **Agenda Items** node in the campaign's tree view.
- **2.** Click on \oplus (**New**).

- 3. Select the speaker:
 - a. Click on Q (Select) next to the Person field.
 - b. Click on Start Search.
 - c. Select the desired person.
- 4. Select the Lecture Subject.
- 5. Enter further information, such as the time and location.
- 6. Switch to the **Speaker** tab to enter further information such as the date of the invitation, the date of confirmation and fee.
- 7. Save the record.

Hotels and Venues

Add hotels, venues and other partners (e.g. catering, entertainment) as accounts in Aurea CRM and assign a company type (e.g. "Hotel").

Enter the corresponding account in the **Event Location** field in the marketing activity.

Adding Equipment

If your event requires special equipment not available at the venue, for example, you can enter information on the equipment.

- 1. Switch to the **Equipment** node in the campaign's tree view.
- **2.** Click on \oplus (**New**).

🖳 New:	Equipment		
 Image: A second s			
Equipment	Extra Seats	v	
Description	Seats for key note	speeches	
Quantity	100	Equipme	~
Currency	EUR	~	
Costs		Costs (2C)	

3. Enter the equipment's details, such as the type, associated costs, quantity etc.

4. Save.

Adding Lecture Subjects

Add topics available for all events in the Lecture Subject info area.

To add a new lecture subject:

- 1. Select **Select** (Marketing) > Lecture Subjects.
- 2. Click on Start Search and then on \oplus (New).
- **3.** Enter details on the topic, such as the field, duration and whether the topic represents a lecture or training subject.
- 4. Click Save.

Adding Speakers

Speakers need to be added to Aurea CRM as persons.

Assigning Lecture Subjects to Speakers

To assign a subject to a speaker:

- 1. Open the account tree view and switch to the Lecture Subjects node under the desired person.
- 2. Click on \oplus (New).
- 3. Select a lecture subject.
- 4. Save.

To assign a lecture subject to a speaker:

1. Select **Marketing**) > Lecture Subjects.

- 2. Click on Start Search.
- 3. Open the desired lecture subject.
- 4. Click on \oplus (New) on the Speakers tab.
- 5. Select the desired person.
- 6. Save.

Creating an Agenda

You can add an agenda for each campaign representing an event or track. Add agenda items to the agenda, such as lectures, coffee and lunch breaks, entertainment etc.

To add an agenda item:

- 1. Switch to the **Agenda Items** node in the campaign's tree view.
- 2. Click on \oplus (New).
- 3. Select the speaker:
 - a. Click on Q (Select) next to the Person field.
 - b. Click on Start Search.
 - c. Select the desired person.
- 4. Select the Lecture Subject.
- 5. Enter further information, such as the time and location.
- 6. Switch to the **Speaker** tab to enter further information such as the date of the invitation, the date of confirmation and fee.
- 7. Save the record.

Verifying and Approving Events

Depending on your internal organization, events may require approval or verification.

Approval consists of two steps:

- 1. The rep submits the event for approval, see Requesting Approval/Verification on page 785.
- 2. The responsible person approves the event and/or verifies that it complies with necessary regulations, see Approving/Rejecting/Verifying Events on page 786.
 - Approval: An employee, e.g. head of marketing, must approve whether the planned event is within budget.
 - Verification: An employee, e.g. from the legal department, verifies that the event complies with the legal requirements. This can be of particular relevance in the pharmaceutical industry.

Note: Once the status of a campaign is set to "Budget Approval", it can no longer be executed. Only once the campaign has been approved and verified (which automatically sets the status to "Scheduled") can you execute the campaign.

Requesting Approval/Verification

The rep that scheduled the event submits the campaign for approval.

To submit an event for approval:

- 1. Switch to the desired campaign.
- 2. Switch to the Approval & Verification tab.
- 3. Enable the **Budget approval required** check box and enter the person responsible for approving the event in the **Budget approval by** field.
- 4. Enable the **Verification required** check box and enter the person responsible for verifying the event complies with legal provisions in the **Verification by** field.

Note: The campaign's start date must be in the future, otherwise the **Budget approval required** and **Verification required** check boxes cannot be enabled. If the start date is not in the future at the time of submission, these check boxes are disabled automatically by the system (without notification).

5. Save the record.

The campaign is forwarded to the employee responsible for approving/verifying the event.

You receive a message when the campaign has been approved or verified.

Approving/Rejecting/Verifying Events

If you are responsible for approving or verifying events, you are informed using a To-Do record whenever a campaign has been submitted.

To approve or reject a campaign:

- 1. Select **Open Link** from the To-Do's context menu. The campaign is opened. Verify that the event is within budget or that all legal requirements are met.
- 2. Select the appropriate options from the context menu. The campaign is approved or rejected.
- 3. Save the record.

The rep responsible for the campaign receives a message about whether the event has been approved, verified or rejected.

Requesting Approval/Verification

The rep that scheduled the event submits the campaign for approval.

To submit an event for approval:

- 1. Switch to the desired campaign.
- 2. Switch to the Approval & Verification tab.
- 3. Enable the **Budget approval required** check box and enter the person responsible for approving the event in the **Budget approval by** field.
- 4. Enable the **Verification required** check box and enter the person responsible for verifying the event complies with legal provisions in the **Verification by** field.

Note: The campaign's start date must be in the future, otherwise the **Budget approval required** and **Verification required** check boxes cannot be enabled. If the start date is not in the future at the time of submission, these check boxes are disabled automatically by the system (without notification).

5. Save the record.

The campaign is forwarded to the employee responsible for approving/verifying the event.

You receive a message when the campaign has been approved or verified.

Approving/Rejecting/Verifying Events

If you are responsible for approving or verifying events, you are informed using a To-Do record whenever a campaign has been submitted.

To approve or reject a campaign:

- 1. Select **Open Link** from the To-Do's context menu. The campaign is opened. Verify that the event is within budget or that all legal requirements are met.
- Select the appropriate options from the context menu. The campaign is approved or rejected.
- 3. Save the record.

The rep responsible for the campaign receives a message about whether the event has been approved, verified or rejected.

Executing Events

Learn to manage events.

To execute an event:

- 1. Switch to the marketing activity you wish to execute.
- 2. Add the event's participants, see Adding Participants on page 788.
- 3. You can determine which lectures participants attend, see Creating a Participant Program on page 789.
- 4. Upon receiving responses, e.g. to invitations, enter the responses, see Managing Participants on page 790.
- 5. Once the event has been held, you need to enter whether participants actually attended the event, see Editing Generated Records on page 544.

Adding Participants

Event participants are added to the campaign. Participants can be added automatically based on a selection or query, or can be added manually. For example, the participants can be generated based on their participation status (e.g. "Registered" or "Participated").

To add participants manually:

- 1. Switch to the desired marketing activity or campaign.
- 2. Click on the Attendees node in the campaign tree.
- 3. Click on \oplus (New).
- 4. Enter details on the participant, e.g.:
 - Name
 - The type of participant (e.g. participant), participation status (e.g. registered or confirmed)
 - Enterinformation concerning the participant's registration date, any cancellations etc. on the **Registration** tab
 - Enter information on the participant's accommodation on the **Hotel** tab, e.g. name of the hotel, type of room
 - Enter information on the **Travel Information** tab such as the date of arrival and departure, mode of transportation, whether a transfer is required etc.
- 5. Save the record.

Creating a Participant Program

To create a program for individual participants, add a participant program:

- 1. Click on the desired participant in the campaign tree.
- 2. Click on 🕀 (New) on the Agenda Items tab.
- 3. Select an agenda item.
- 4. Click Save.

Alternatively, add the participant to the agenda item:

- 1. Click on the desired agenda item in the campaign tree.
- 2. Click on \oplus (New) on the Attendees tab.
- 3. Select the participant.
- 4. Click Save.

Managing Participants

You can manage participants for each marketing activity in two ways:

- By changing the **Participation Status** in the participant record (Registered, Confirmed, Canceled, Participated, Missed).
- By entering responses in the generated activities, mailings or work orders. Depending on the **Registration** and **Participation Status** defined for the response, participants are added or edited automatically:
 - Registration field:
 - Register: A target group record is automatically added to the follow-up activity entered and a participant record added to the campaign (Participation Status = "Registered" and Registered on = current date).
 - Unregister: A target group record is automatically added for the follow-up marketing activity entered (but **no** participant record is added to the campaign).
 - Participation Status field:
 - Participated: The participations status in the participant record is set to "Participated" and a target group record is added for the follow-up marketing activity.
 - Missed: The participations status in the participant record is set to "Missed" and a target group record is added for the follow-up marketing activity.
- If you change the response at a later date, the target group and participant records are updated:

"Yes, I'm coming" -> "I can't make it": The participant record is set to "Canceled"', the registration date is deleted and the cancellation date entered. The target group record added for the original follow-up activity is deleted, and a new target group record is added for the new follow-up activity.

Note: Attention: When entering responses, ensure that you only select a single answer. Multiple responses can lead to undesired results.

Adding Participants

Event participants are added to the campaign. Participants can be added automatically based on a selection or query, or can be added manually. For example, the participants can be generated based on their participation status (e.g. "Registered" or "Participated").

To add participants manually:

- 1. Switch to the desired marketing activity or campaign.
- 2. Click on the Attendees node in the campaign tree.
- **3.** Click on \oplus (**New**).

- 4. Enter details on the participant, e.g.:
 - Name
 - The type of participant (e.g. participant), participation status (e.g. registered or confirmed)
 - Enter information concerning the participant's registration date, any cancelations etc. on the **Registration** tab
 - Enter information on the participant's accommodation on the **Hotel** tab, e.g. name of the hotel, type of room
 - Enter information on the **Travel Information** tab such as the date of arrival and departure, mode of transportation, whether a transfer is required etc.
- 5. Save the record.

Creating a Participant Program

To create a program for individual participants, add a participant program:

- 1. Click on the desired participant in the campaign tree.
- 2. Click on \oplus (New) on the Agenda Items tab.
- 3. Select an agenda item.
- 4. Save.

Alternatively, add the participant to the agenda item:

- 1. Click on the desired agenda item in the campaign tree.
- 2. Click on \oplus (New) on the Attendees tab.
- 3. Select the participant.
- 4. Save.

Managing Participants

You can manage participants for each marketing activity in two ways:

- By changing the **Participation Status** in the participant record (Registered, Confirmed, Canceled, Participated, Missed).
- By entering responses in the generated activities, mailings or work orders. Depending on the **Registration** and **Participation Status** defined for the response, participants are added or edited automatically:
 - Registration field:
 - Register: A target group record is automatically added to the follow-up activity entered and a participant record added to the campaign (**Participation Status** = "Registered" and **Registered on** = current date).
 - Unregister: A target group record is automatically added for the follow-up marketing activity entered (but **no** participant record is added to the campaign).
 - Participation Status field:
 - Participated: The participations status in the participant record is set to "Participated" and a target group record is added for the follow-up marketing activity.
 - Missed: The participations status in the participant record is set to "Missed" and a target group record is added for the follow-up marketing activity.
- If you change the response at a later date, the target group and participant records are updated:

"Yes, I'm coming" -> "I can't make it": The participant record is set to "Canceled"', the registration date is deleted and the cancelation date entered. The target group record added for the original follow-up activity is deleted, and a new target group record is added for the new follow-up activity.

Note: Attention: When entering responses, ensure that you only select a single answer. Multiple responses can lead to undesired results.

Rating Events

Once an event has been held, you can collect information on how the participants rated the event using a questionnaire.

Once an event has been held, you can collect information on how the participants rated the event using a questionnaire. This rating can then be entered in Aurea CRM web. Ratings can be entered for the venue, speakers and accommodation.

Rating Speakers

Enter the ratings of speakers received from individual participants in the corresponding agenda item of the participant program.

To rate a speaker:

- 1. Click on the desired participant in the campaign tree.
- 2. Select an agenda item on the Agenda Items tab.
- 3. Enter the rating from the questionnaire in the Evaluation: Lecture Subject and Evaluation: Speaker fields.
- 4. Save.

Note: You can enter anonymous ratings in the agenda item (in the campaign). Enter the number and sum total from the anonymous ratings here.

Rating the Venue and Hotels

Enter the rating of the venue and accommodation in the participant record.

To rate the venue and hotel:

- 1. Click on the desired participant in the campaign tree.
- 2. Enter the rating of the venue in the Rating: Venue field.
- 3. Enter the hotel's rating in the Rating: Accommodation field.

Calculating the Overall Rating

You can calculate the average rating of the event, accommodation and speakers based on all the individual ratings.

Your administrator defines a date. All events with the same or a later start date are included in the calculation. The result is the mean of all ratings entered for the event, accommodation and speakers.

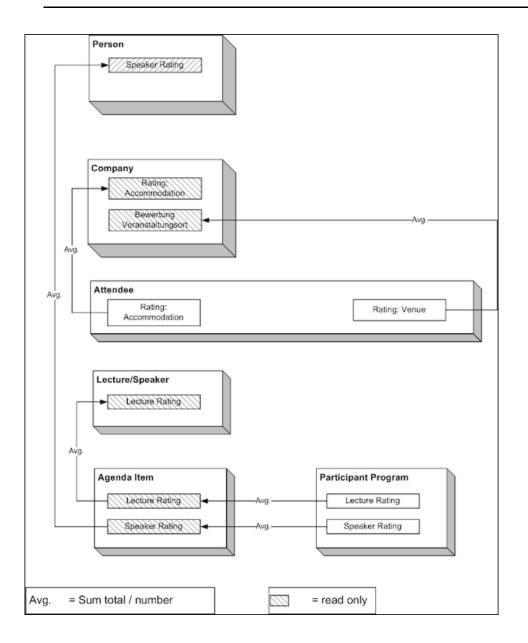
To calculate the rating:

1. Select (Marketing) > Calculate Lecture/Speaker Rating or (Marketing) > Calculate Accommodation/Venue Rating from the application menu.

The mean value of all ratings is entered in the **Rating** field in the corresponding records:

- Agenda item: Lecture Rating and Speaker Rating
- Lecture subject with the same lecture subject and speaker: Lecture Rating
- Person record of the speaker: Speaker Rating
- Company record of the venue: Rating: Venue
- Company record of the hotel entered for participants: Rating: Accommodation

Note: These **Evaluation** fields are not write-protected. You can enter the overall rating manually. Values in the **Rating** fields are overwritten the next time the calculation is performed.



Rating Speakers

Enter the ratings of speakers received from individual participants in the corresponding agenda item of the participant program.

To rate a speaker:

- 1. Click on the desired participant in the campaign tree.
- 2. Select an agenda item on the Agenda Items tab.
- 3. Enter the rating from the questionnaire in the **Evaluation: Lecture Subject** and **Evaluation: Speaker** fields.
- 4. Save.

Note: You can enter anonymous ratings in the agenda item (in the campaign). Enter the number and sum total from the anonymous ratings here.

Rating the Venue and Hotels

Enter the rating of the venue and accommodation in the participant record.

To rate the venue and hotel:

- 1. Click on the desired participant in the campaign tree.
- 2. Enter the rating of the venue in the Rating: Venue field.
- 3. Enter the hotel's rating in the Rating: Accommodation field.

Calculating the Overall Rating

You can calculate the average rating of the event, accommodation and speakers based on all the individual ratings.

Your administrator defines a date. All events with the same or a later start date are included in the calculation. The result is the mean of all ratings entered for the event, accommodation and speakers.

To calculate the rating:

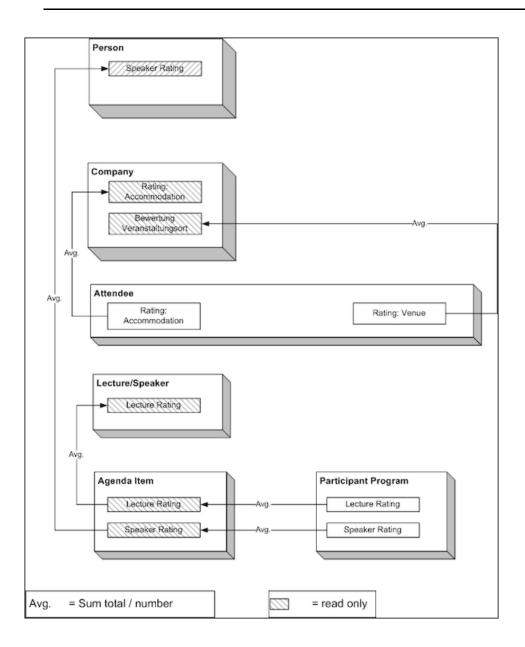
Select (Marketing) > Calculate Lecture/Speaker Rating or (Marketing) > Calculate Accommodation/Venue Rating from the application menu.

The mean value of all ratings is entered in the **Rating** field in the corresponding records:

- Agenda item: Lecture Rating and Speaker Rating
- Lecture subject with the same lecture subject and speaker: Lecture Rating

- Person record of the speaker: Speaker Rating
- Company record of the venue: Rating: Venue
- Company record of the hotel entered for participants: Rating: Accommodation

Note: These **Evaluation** fields are not write-protected. You can enter the overall rating manually. Values in the **Rating** fields are overwritten the next time the calculation is performed.



Monitoring Event Costs

Learn to monitor expenses incurred for events.

When holding an event, various costs are accrued, e.g. for renting rooms, transportation costs etc. You can enter the costs for accommodation (hotel) and transport in the corresponding participant records. The costs entered for all participants are totaled and displayed in the campaign record.

To display the costs of a campaign:

1. Switch to the desired campaign.

- 2. Switch to the **Costs** tab. The following costs are totaled for all participants:
 - Accommodation costs in the Costs: Hotel field.
 - Transportation costs in the **Costs: Transport** field.
 - The participant's own contribution in the **Costs: Own costs contribution** field.
- 3. You can enter any further costs (e.g. rent for the venue and equipment, fees and travel expenses for speakers) in the **Costs: Entire Event** field.

22

Customer Service – LSI

Storing customer data.

You can store data relevant to customer service processes, such as:

- Medical inquiries, see Medical Inquiries.
- Information in your knowledge base, see Knowledge Base.

Medical Inquiries

Health specialists often make specific product inquiries. You can store these inquiries in Aurea CRM, document them and process them.

To add a new medical inquiry:

1. The following options are available:

- Select (Service) > New Medical Request. Search for the person you want to add the inquiry for.
- Switch to the person you want to add the inquiry for. Click on the **Medical Requests** node in the tree. Click on ⊕ (**New**).
- You can add inquiries when documenting calls, see Call Documentation LSI on page 432.
- 2. Select the appropriate role.
- 3. Enter data such as the Request topic, Item No., Cause etc.
- 4. Save the record.

Note: Click on + (**Copy to Knowledge Base**) in the header to add the inquiry to your knowledge base, see Knowledge Base on page 797.

Select (Service) > Medical Requests to display an overview of all medical inquiries.

Knowledge Base

You can store best practice examples and FAQs in the knowledge base, and use this to quickly solve any issues. You can add medical inquiries to the knowledge for future reference, see Medical Inquiries on page 797.

Select **(Service) > Knowledge Base** to access the knowledge base.

Medical Inquiries

Health specialists often make specific product inquiries. You can store these inquiries in Aurea CRM, document them and process them.

To add a new medical inquiry:

1. The following options are available:

- Select (Service) > New Medical Request. Search for the person you want to add the inquiry for.
- You can add inquiries when documenting calls, see Call Documentation LSI on page 432.
- 2. Select the appropriate role.
- 3. Enter data such as the Request topic, Item No., Cause etc.
- 4. Save the record.

Note: Click on + (**Copy to Knowledge Base**) in the header to add the inquiry to your knowledge base, see Knowledge Base on page 797.

Select (Service) > Medical Requests to display an overview of all medical inquiries.

Knowledge Base

You can store best practice examples and FAQs in the knowledge base, and use this to quickly solve any issues. You can add medical inquiries to the knowledge for future reference, >> Medical Inquiries on page 797.

Select (Service) > Knowledge Base to access the knowledge base.

23 Bulletin Board – LSI

Bulletin Board can be used for information broadcasting and exchange.

Use the bulletin board to exchange information within your company, e.g. to provide sales reps with information relevant to customer appointments. Topics can be added to the bulletin board for a specific customer or as independent entries.

earch	n Results				🖺 New 🗷 🗸 🛱 M	Modify List Fields
ø	Title	Starts on	Ends on	Link	Rep	
₽≡	Pharmacy has new owners	05.12.2011	30.12.2011	_Albanien Ap	otheke 3 Access	denied
	Current trends	08.12.2011	22.03.2012		Access	denied
	Company internal news	01.01.2012	31.12.2099		Access	denied
elate	d Data					III ~
		letin Board Group ×			New	
		letin Board Group × Category 1		Category 2	Rep	
Bulle	tin Board Post × Bul	Category 1		Category 2		I v → Browse
Bulle	tin Board Post × Bul	Category 1		Category 2	Rep	(9101)

The user that adds a topic (e.g. back office staff) can define which other users can view the topic. Any number of posts can be submitted for a single topic.

Select **Select** (Sales) > Bulletin Board to access the bulletin board. The bulletin board may also be accessible from your start page.

Switch to the Bulletin Board node in the tree to display all topics that are currently valid for a customer.

Note: You need appropriate access rights to be able to add topics and groups.

Adding Bulletin Board Topics

To add a bulletin board topic:

- 1. Select 🔙 (Sales) > Bulletin Board.
- 2. Click on \oplus (New).

The mask used to add new records is opened.

You are automatically entered in the **Rep** field.

- 3. Enter a **Title** and define the topic's validity period.
- 4. If the topic is company-specific, click on ^Q (Select) next to the Link field to select the customer.
- 5. Save the record.

Defining Bulletin Board Groups

Bulletin board groups are used to define which reps/groups can view a specific topic.

To define a bulletin board group:

- 1. Switch to the desired bulletin board topic.
- 2. Click on \oplus (New) on the Bulletin Board Group tab.
- 3. Enter the desired rep or group in the **Rep** field.
- 4. Save the record.

Note: Define multiple bulletin board groups to allow multiple reps/groups to access a topic.

Posting Messages to the Bulletin Board

All posts in a topic are displayed when the topic is selected. Any number of posts can be added to a topic.

All reps who can access a bulletin board topic can view the posts and submit new ones, see Defining Bulletin Board Groups on page 800.

To post a message to the bulletin board:

- 1. Switch to the desired bulletin board topic.
- 2. Click on \oplus (New) on the Bulletin Board Post tab.

You are automatically entered in the **Rep** field.

- 3. Enter the Text.
- 4. You can assign categories to the post (e.g. Competitor information, USP).
- 5. Save the record.

You can add documents to messages:

- Open the message and switch to the **Document Links** tab under Related Data. Click on ⊕ (New), >> Document Management on page 336.
- Select a topic, select the desired message under Related Data and click on ⊕
 (New) under Documents.

Adding Bulletin Board Topics

To add a bulletin board topic:

- 1. Select **I** (Sales) > Bulletin Board.
- 2. Click on \oplus (New).

The mask used to add new records is opened.

You are automatically entered in the **Rep** field.

- 3. Enter a **Title** and define the topic's validity period.
- 4. If the topic is company-specific, click on Q (Select) next to the Link field to select the customer.
- 5. Save the record.

Defining Bulletin Board Groups

Bulletin board groups are used to define which reps/groups can view a specific topic.

To define a bulletin board group:

- 1. Switch to the desired bulletin board topic.
- 2. Click on \oplus (New) on the Bulletin Board Group tab.
- 3. Enter the desired rep or group in the **Rep** field.
- 4. Save the record.

Note: Define multiple bulletin board groups to allow multiple reps/groups to access a topic.

Posting Messages to the Bulletin Board

All posts in a topic are displayed when the topic is selected. Any number of posts can be added to a topic.

All reps who can access a bulletin board topic can view the posts and submit new ones, see **Defining Bulletin Board Groups** on page 800.

To post a message to the bulletin board:

- 1. Switch to the desired bulletin board topic.
- **2.** Click on \oplus (New) on the Bulletin Board Post tab.

You are automatically entered in the **Rep** field.

- 3. Enter the Text.
- 4. You can assign categories to the post (e.g. Competitor information, USP).
- 5. Save the record.

You can add documents to messages:

- Open the message and switch to the **Document Links** tab under Related Data. Click on ⊕ (New), >> Document Management on page 336.
- Select a topic, select the desired message under **Related Data** and click on ⊕ (New) under **Documents**.

24

Sunshine Act – LSI

Learn about Sunshine Act and how to create it.

As of 2015, the European Federation of Pharmaceutical Industries and Associations requires all transfers of value to healthcare professionals and healthcare organizations to be documented and disclosed (Disclosure Code). Aurea CRM includes the ability to generate and publish a Sunshine Act report in order to meet these requirements. This report is generally published once a year, but can however be created at any time during the year in order to verify and correct the data in it.

Note: Different information may be required for different countries, depending on the applicable legislation. Your administrator is responsible for defining the country the report applies to, and only those doctors are listed that are primarily active in that country. The report is output in your language.

The data in the Sunshine Act report is taken from the Sunshine Act Data info area. Back office staff can generate sunshine act data automatically based on the data entered in the system. The data in the report (e.g. sponsorship agreements, registration fees) are taken from a variety of areas (e.g. call expenses, event participants, information on clinical trials).

Back office staff can edit the data in the corresponding areas and then generate the data included in the report anew.

To create a Sunshine Act report:

- 1. Select (Reporting) > Sunshine Act.
- 2. Click on one of the following:
 - Create records for previous year: Generates records for the previous year.
 - Create records for current year: Generates records for the current year.

A Sunshine Act record is added and the data required by the Sunshine Act report (Sunshine Act Data info area) is generated. Two To-Do records are added and assigned to CRM.server and used to calculate the data in the report.

To-Do									
Sear	rch Sunshine	Act Year					0		
Search	n Results	(iii) Creat	e records for	previous year	Create records for current y	year 🔓 Create Report 🕞 Comp	lete 🛛 🚺 🗍 🏟 Modify List Fields		
£ 1	fear	Title		Starts on	Ends on	Publication	Created on		
≣ 2							18.11.2014		
2	2013	Sunshine Ac	Sunshine Act 2013		31.12.2013		03.09.2014		
	d Data ne Act Data × _ E	Document Links ×							
<c <<="" td=""><td>1 - 15 of 37 > >></td><td></td><td></td><td></td><td></td><td></td><td>→ Browse</td></c>	1 - 15 of 37 > >>						→ Browse		
1	Person	Account	Sponsor	Travel & Acc	Donations & Registration	f Consulting fe Other consult			
	Ben Aki			215,00	88,00		303,00		
	Kai-Uwe He			200,00		78,00 89,00	367,00		
		310 Klinik AG		90,00			90,00		
	Mira Nora			50,00			50,00		
		Ran Mitte		50,00	200,00		250,00		

3. Verify the data.

If necessary, correct data entered in relevant records (e.g. campaign or attendee records) and create a new Sunshine Act record. Delete the previous record.

4. Click on 🕮 (Create Report) to generate the report. The report is opened in a new tab.

Sunshine Act Report 2014 (EUR)									8				
					DEA		Contribution to event costs			Consultation fee		December 1	
					No.	Donations & Grants	Sponsorship agreements	Registration fees	Travel & Accommodation	Consulting fees	Other consulting expenses	Research & Development	
HCP	P INDIVIDUAL NAMED EISCLOSURE - one line per HCP												
HCP	MD Ben Aki	Nümberg 90402	Germany	Mittestraße				88,00	215,00	0,00	0,00		303,00
HCP	MD Kai-Uwe Helmers	Hamburg 22089	Germany	Wandsbeker Chaussee 313				0,00	200,00	78,00	89,00		367,00
HCP	OP Other, not included above												
HCP	Aggregate an	nount attributable	to transfers	of values to such re-	ipients			0,00	85,00	0,00	0,00		85,00
HCP	Number of recipients					0	2	0	0				
HCP		% of total transfe	rs of value t	o individuals in this c	stegory			0%	50%	0%	0%		
нсо	CO BIOINDUAL, NAMED DISCLOSURE - one line per HCO												
нсо	Ran Mitte	Nümberg 90402	Germany	Mittestraße		200,00	0,00	0,00	50,00	0,00	0,00		250,00
нсо	310 Klinik	Nümberg 90411	Germany	Neumeyerstr. 45-43		0,00	0,00	0,00	90,00	0,00	0,00		90,00
нсо	O Other, not included above												
нсо	Aggregate ar	nount attributable	to transfers	of values to such re-	ipients	0,00	0,00	0,00	0,00	0,00	0,00		
нсо				Number of re-	ipients	0	0	0	0	0	0		
ю	% of total transfers of value to individuals in this category					0%	0%	0%	0%	0%	0%		
							Total						
						200,00	0.00	88,00	640.00	78,00	89,00	0,00	1095,00

If the Non individual named disclosure check box is disabled for an account/person, the costs for the person or account is listed individually in the report. If this field is enabled, the costs are aggregated under Other, not included above.

Each person and account is only listed in the report once.

5. Click on 🖶 (Print) to print the report.

You can save the report (e.g. using the save option in your browser's File menu) and add it to the sunshine act data record on the Document Links tab under Related Data.

6. Click on ^C (Complete) if the data in the report is correct. You can then publish this version.

Once the Sunshine Act record for a year has been set to completed, the data included in the report can no longer be generated.

Note: Only those persons and accounts are included in the Sunshine Act report where the Sunshine Act relevant field is enabled. If the same person occupies multiple roles at various accounts, the role where the Sunshine Act address field is enabled is taken into account in the Sunshine Act report, see Accounts, Persons and Roles on page 236. Only one address can be used per person in the Sunshine Act report.

Sunshine Act Data	Source
Person	Salutation, First name, Last Name and DEA No. of the person
Role	Street , Postal Code , City and Country in the person's role (the role where Sun- shine Act relevant is enabled in the case of multiple roles)
Account	Account name, Street, Postal Code, City, and Country of the account
Donations & Grants	Amount entered in call expenses where the Receipt type is "Sponsoring" and the associated activity's end date (Ends on field) is within the reporting period
Sponsorship Agreements	Costs: Donations (actual) entered for an attendee if the Type of the associated campaign is "Donations & Grants" and the Event ends on date is within the re- porting period
Registration Fees	Costs: Attendance (actual) entered for an attendee if the Type of the associated campaign is "Event" and the Event ends on date is within the reporting period
Travel & Accommodation	Amount entered in call expenses where the Receipt type is either "Hospitality" or "Beverages" and the associated activ- ity's end date (Ends on field) is within the reporting period
	Costs: Hospitality (actual) , Costs: Ho- tel (actual) entered for an attendee if the Type of the associated campaign is "Event" and the Event ends on date is within the reporting period
Consulting Fees	Costs: Fees (actual) entered in an agenda item if the Type of the associated campaign is "Event" and the Event ends on date is within the reporting period

The Sunshine Act report includes data taken from the following areas:

Sunshine Act Data	Source
Other consulting expenses	Other speaker costs (actual) entered in an agenda item if the Type of the associ- ated campaign is "Event" and the Event ends on date is within the reporting peri- od
Research & Development	Costs : Fee entered in a fee record if the Type of the associated campaign is "Research & Development" and the Fee paid on date entered in the fee lies within the reporting period.
	Note: The transactions of value are only output as a sum total for research and development in the report, not individually per person or account.

For information on using campaigns for Sunshine reports, see Campaigns for Sunshine Act Reports on page 553.

25 CRM.intelligence – LSI

CRM.intelligence is used for in depth data analysis.

Various analyses are available in Aurea CRM web. However, these analyses do not equate to a fully-fledged analysis tool. You can use CRM.intelligence to further analyze your data. CRM.intelligence is based on QlikView technology and is not part of Aurea CRM web.

To analyze Aurea CRM data using CRM.intelligence:

1. Select (Reporting) > CRM.intelligence.

The CRM.intelligence login page is displayed.

2. Enter your user name and password.

The application is started.

Note: CRM.intelligence is not described in this manual.