Customer Relationship Management

Crm

LSI User Manual

Version 14.1

Aurea

Unlimited Possibility

Notices

Table of Contents

Preface

For details, see the following topics:

- About this documentation
- Notation conventions
- Aurea global support

About this documentation

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

Notation conventions

This document uses the following notation conventions:

Convention	Meaning
`Fixed-width`	`Fixed-width` font indicates code, path names, file names, environment variable names, parameter names, command names, machine names, URLs.
`Bold Fixed-width`	**`Bold Fixed-width`** font is used to indicate user input or to emphasize certain lines of code.
Italic Fixed-width	*Italic Fixed-width* 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, *italic serif* typeface indicates the first use of an important term. The term is defined in the glossary.
Underlined	Underlined text in command lines and parameter descriptions indicate that you only have to enter the underlined part of the command or parameter name. For example, if you use the `-LOGFILE` 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 fully-fledged CRM solution. The data displayed by the system depends on your role. Access rights are defined by your administrator.

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

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

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

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

3. Select the role(s) you want to log in with. You can select multiple roles.

4. Click on **OK** to log on.

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

Switching between Telephone Profiles

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

The name of the telephone profile in use is displayed in the system information, see System Information on page 62.

To change your telephone profile:

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

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

2. Enter your user name and password.

3. Click on **Log In**. The **Select Settings for this Session** dialog box is displayed.

4. Select the desired profile from the **Telephone Profile** drop-down list. By default, **Do not show phone toolbar** is selected.

5. Click on **OK**.

6. Aurea CRM web is started and CRM.phone uses the selected profile.

Logging Out

For security reasons, always exit Aurea CRM web by clicking on [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 ⊕ (**New**) button.

Areas

Learn about the areas of Aurea CRM web user interface.

The Aurea CRM web user interface consists of:

• The sidebar (on the left)
• The working area (to the right)
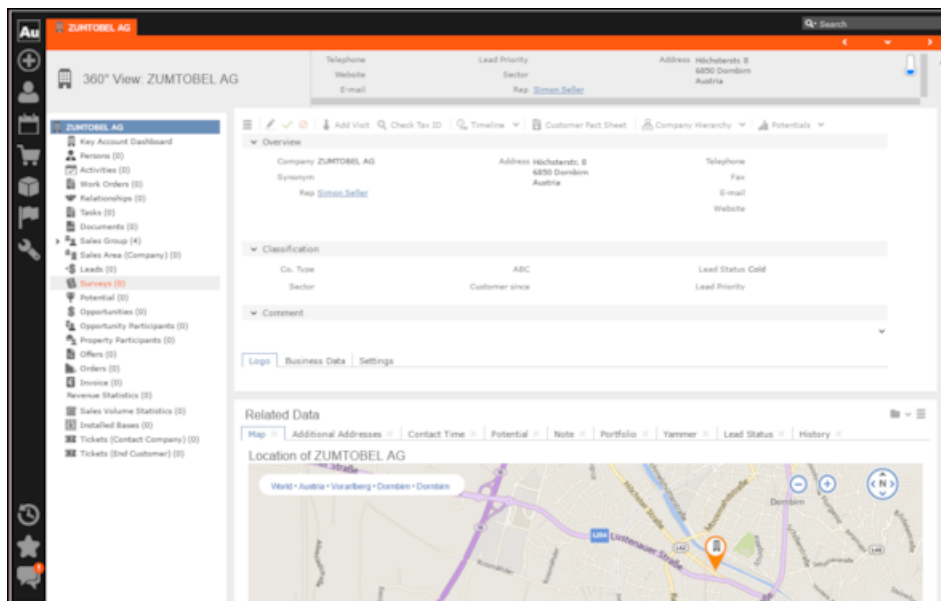
Start Page

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

Your start page is displayed once you have logged on.
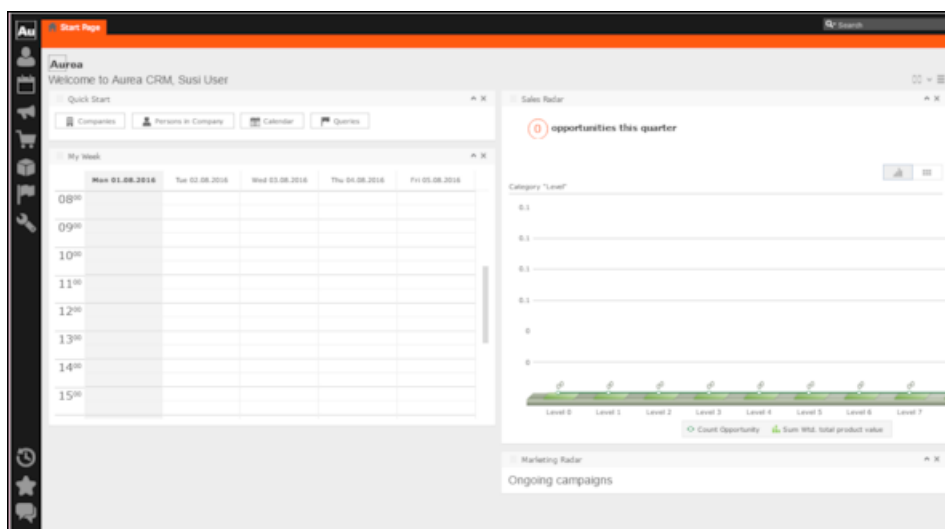
The start page's content depends on your current role (e.g. the start page for marketing employees is different from that for service technicians) and the configuration defined by your administrator.

You can customize the layout of your start page. Drag an area to the desired position and release the mouse button. Click on ✖ 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:
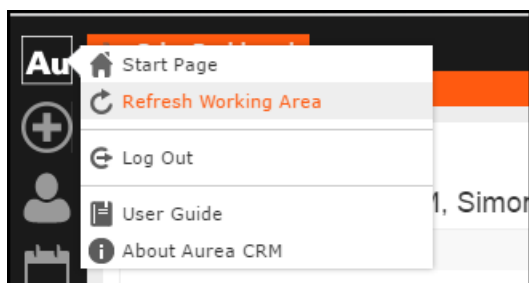
- **Start Page**: Switches to Aurea CRM web's start page.
- **Refresh Working Area**: Refreshes the current screen.
- **Log Out**: Closes Aurea CRM web. For security reasons, always exit Aurea CRM web using this option.

- **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. [icon] for the **Daily business** menu). Click on the icon and select the desired option:
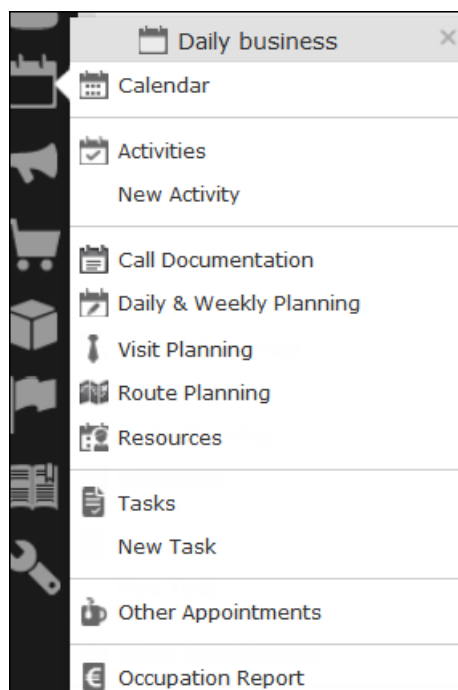
History

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**).
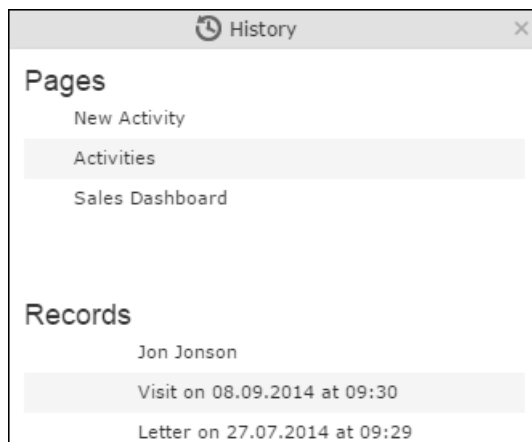
Your history is divided into two sections:

- 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 (**Favorites**). Your favorites are displayed.

The top section displays your quick links. Your favorites are displayed below the quick links, grouped by info area.
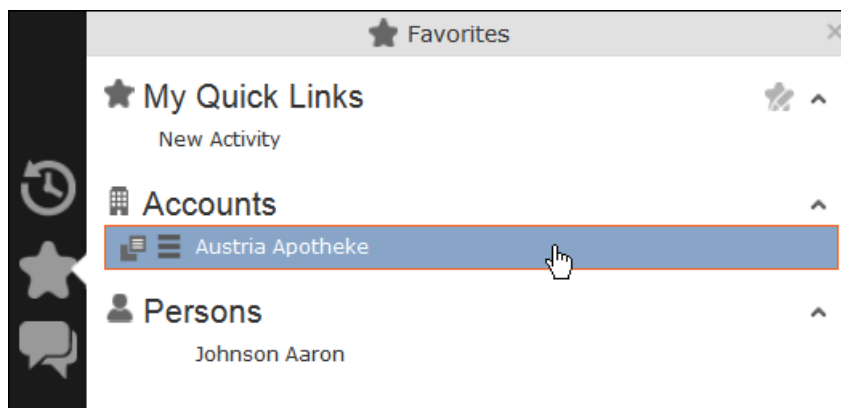
2. You can access the context menu (≡) and quick view (▣) for all entries in the list. Double-click on a record to open it in the default view.

3. If you have added records to your list of favorites, you can also access these records from the corresponding menu entry (e.g. you can access your favorite companies from the **Companies** menu):
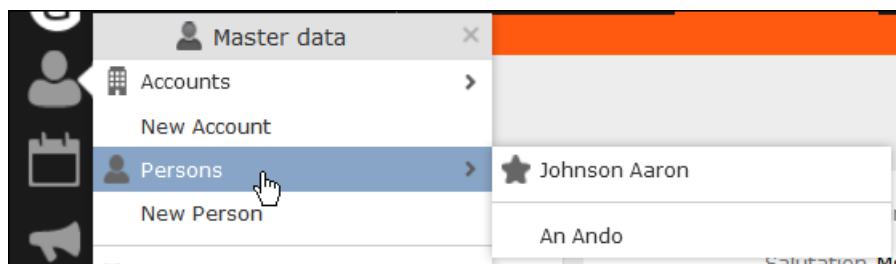
Adding Records to your Favorites

To add a record to your favorites:

1. Switch to the desired record, see Searching on page 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 (**Favorites**).

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

   The **My Quick Links** dialog is displayed.
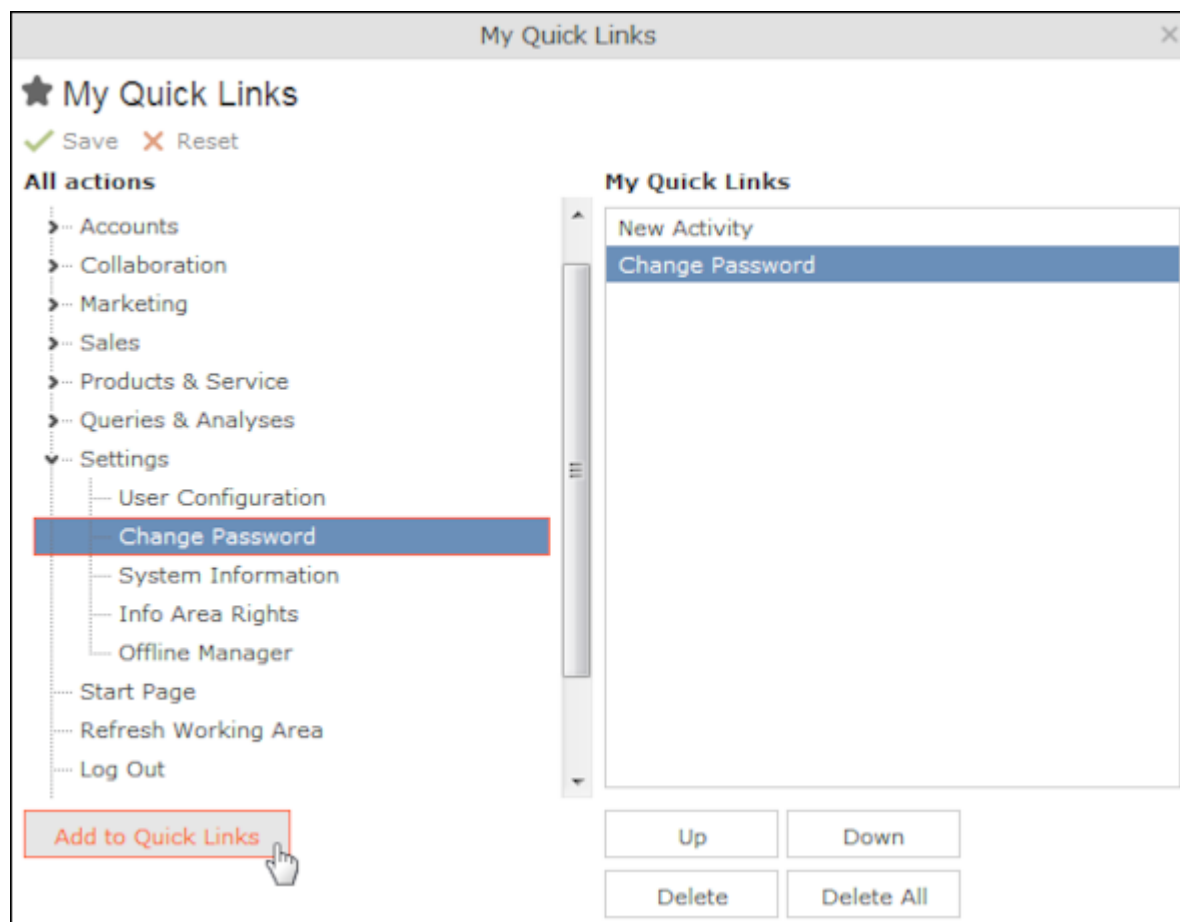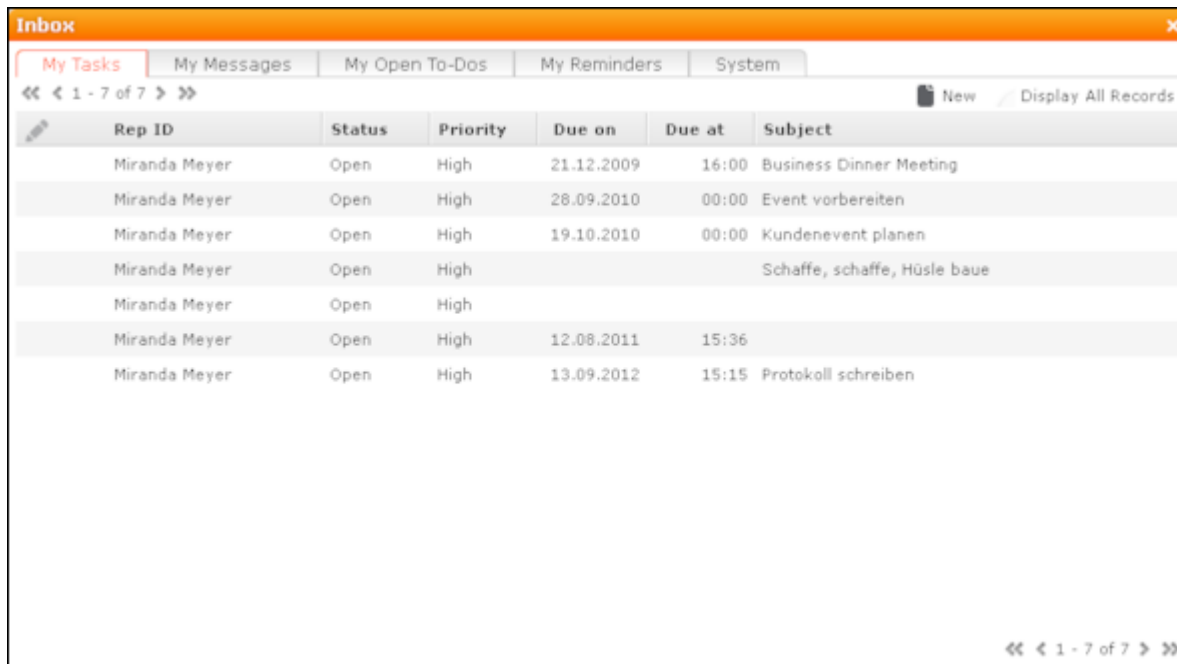
3. Click on the ❯ icon under **All actions** next to one of the sections. All available menu options are displayed.

4. Select an entry and click on **Add to Quick Links**. The entry is displayed under **My Quick Links**.

5. Use the **Up** and **Down** buttons to determine the desired position of the entry.

6. To delete an entry, select it and click on **Delete**. Use the **Delete All** button to delete all entries in the list.

7. Click on **Save** to accept your settings. Click on **Reset** to revert to the default settings.

Inbox

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

To display your inbox:

1. Click on ![Inbox icon] (**Inbox**). Your inbox is opened.

The following tabs are displayed:

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

- **My Messages:** Messages you have received are listed here.

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

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

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

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

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

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

  exclamation mark (![icon]).

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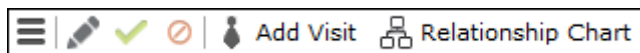
- Some buttons, e.g. **Save**, are only displayed following certain actions:

- 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 - 20 of 50+ › »

        20 records are displayed per page.

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

        Example: « ‹ 1 - 20 of 50+ › »

        50 records are returned by the server in each query step. The + icon indicates that additional results are available but have not been loaded yet.

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

Breadcrumbs

The breadcrumb trail is located to the top of the screen, and provides you with an overview of your current position.
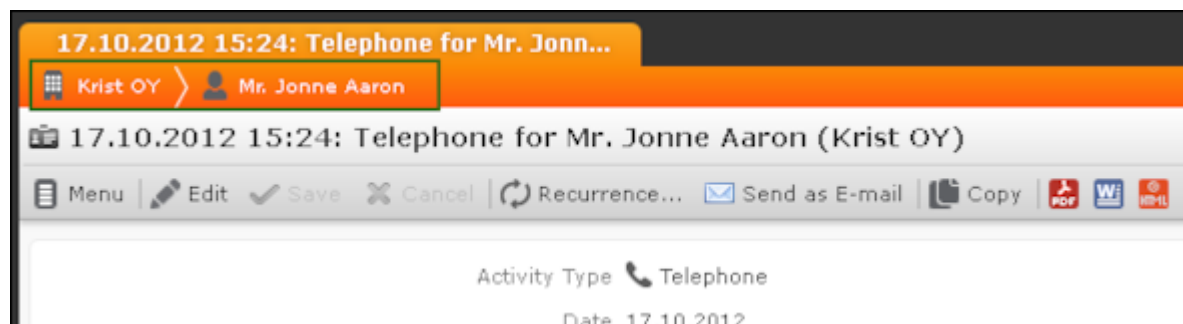
Click on a parent record in the breadcrumb trail to switch to that record.

Search Area

The search area allows you to search for records using search criteria, 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 🔍 (**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:
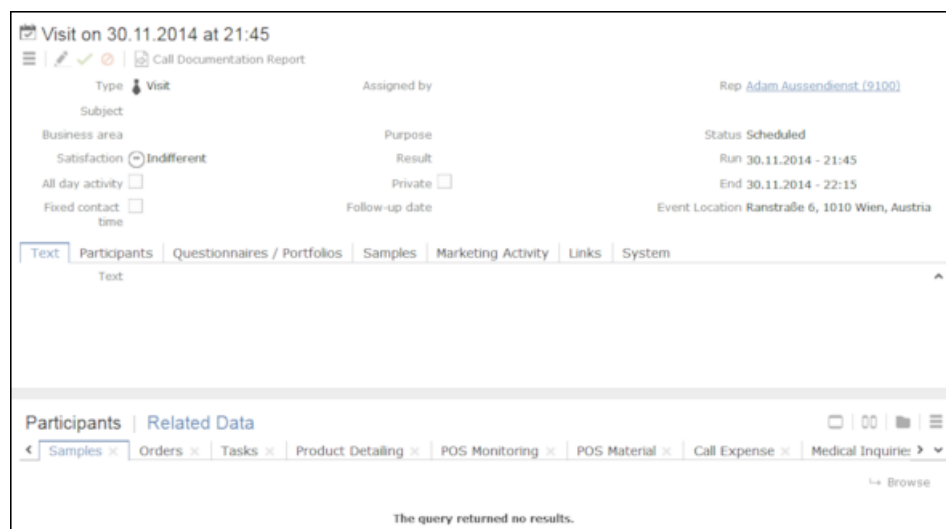
  The record is displayed in the upper area. You can edit the data and export the record. The breadcrumb trail is also displayed, see Breadcrumbs.

  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:

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:

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:

When moving a tab, the gray area indicates the tab's new position; release the mouse to place the tab here:
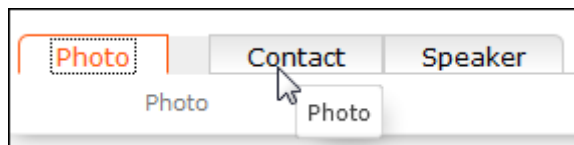
Note: You can also change the order of the tabs/groups displayed in the **Related Data** area in the same way.

- **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:

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

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

  To display the quick view:

  1. To open quick view, do any of the following:

  - Click on ![Quick View icon] (**Quick View**) in a list.
  - Click on a link in a list or on a tab and keep pressing the mouse button ("long click").
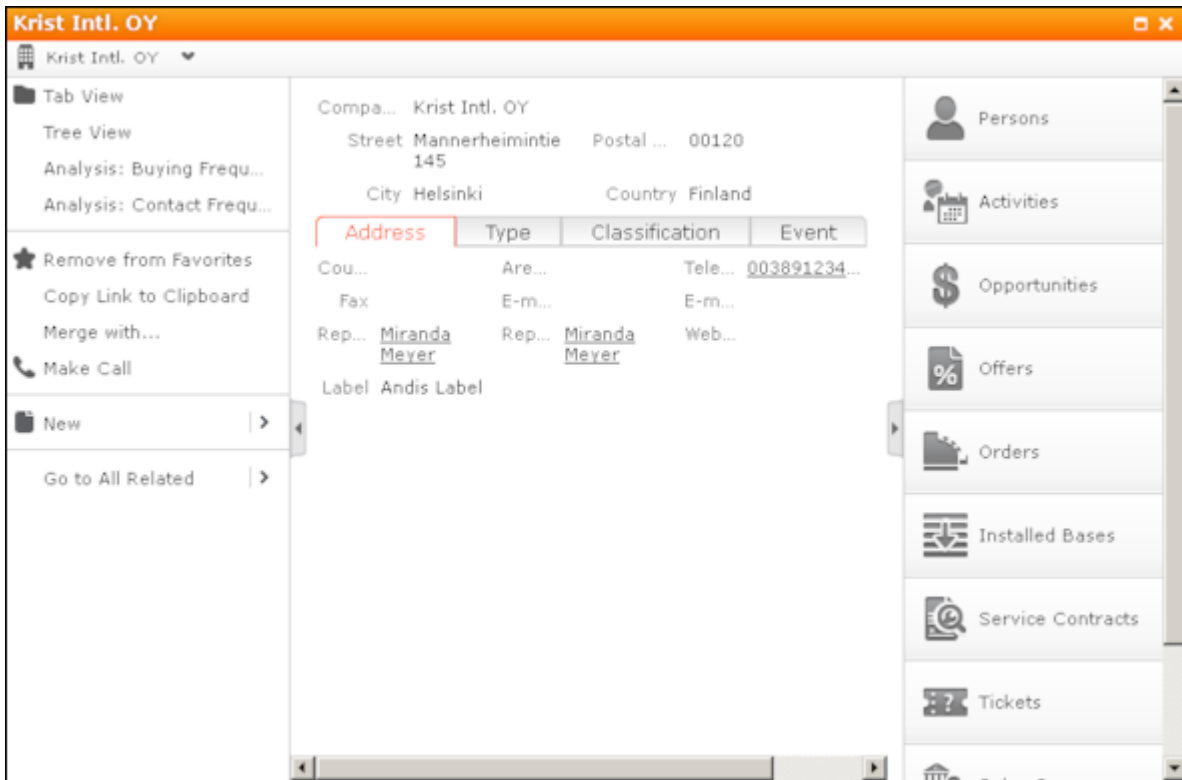
  The record's details are displayed in the center (and cannot be edited).

  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.
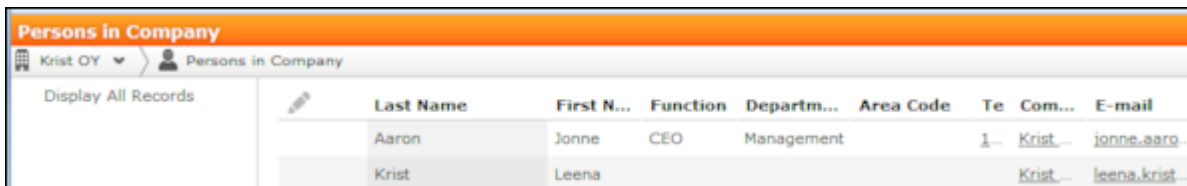
  3. Click on ![left arrow] and ![right arrow] to hide or show the right and left areas.

  Breadcrumb Trail in the Quick View

  The breadcrumb trail is also available in the quick view:

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

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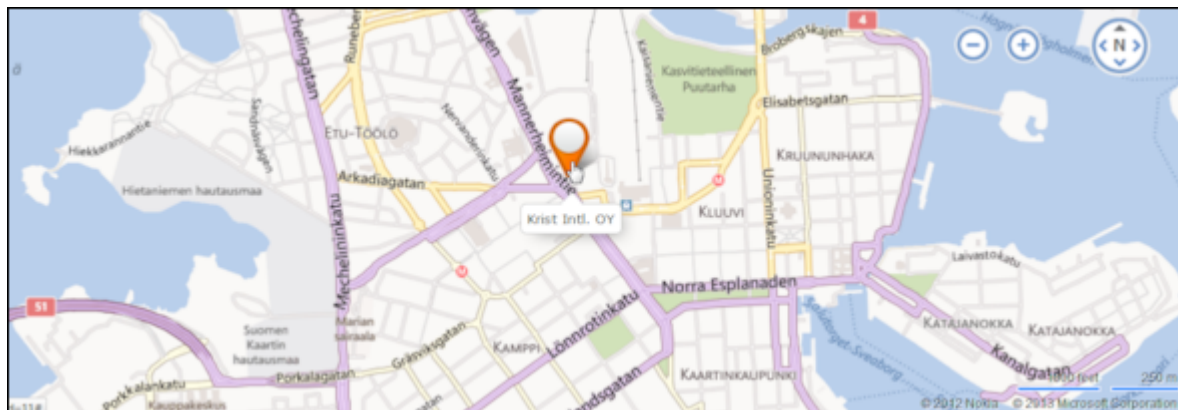
  If fields are available that contain geographic coordinates, this data is used to display the location (even if the coordinates differ from the address). If no geographic coordinates are available, the address data entered in the database is used to determine the location.

  Click on the orange marker to display details concerning the address:
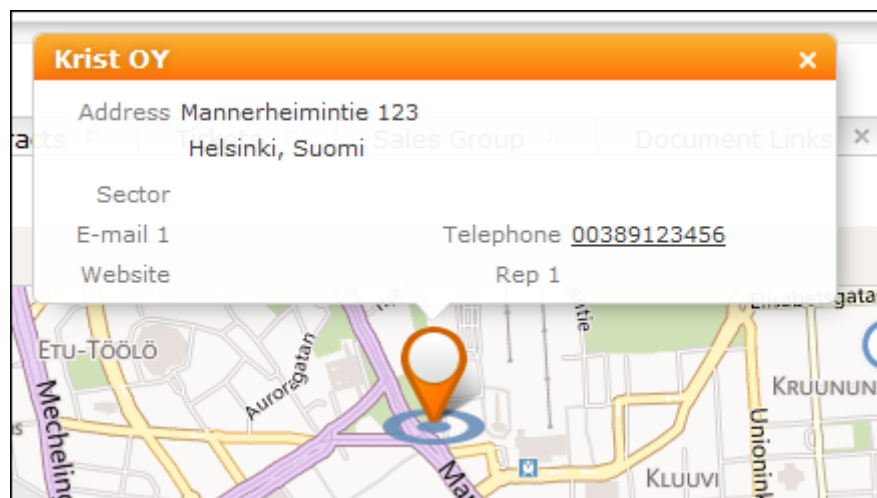
  The map view for activities or calendar entries displays records at the location of the person or company the activity was added for.

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

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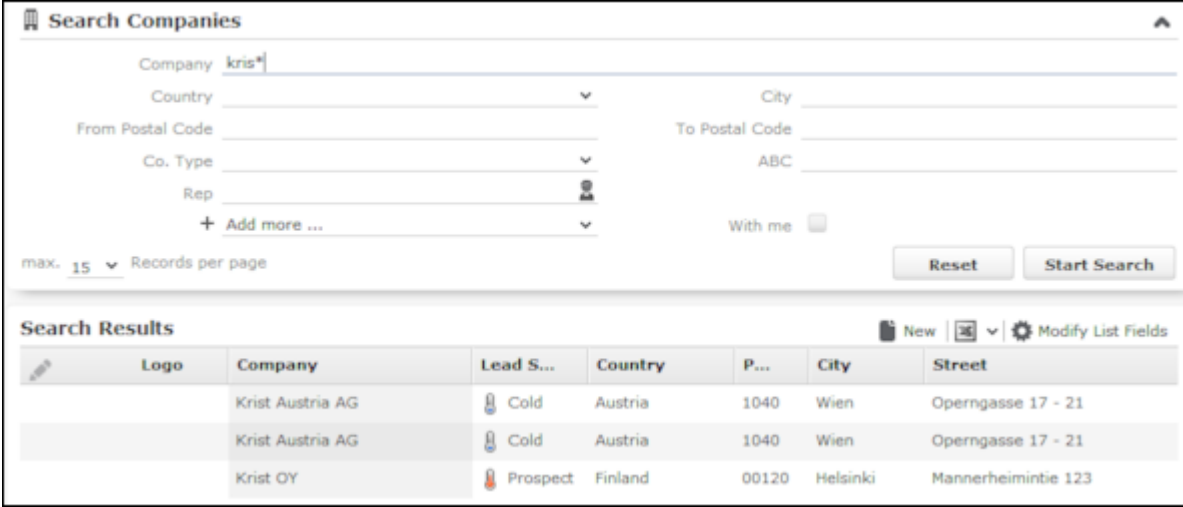
You can edit records directly in the results list, export the data, or display a record's important details in the MiniDetails.

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.

- ≡ (**Show Menu**): Displays the record's context menu, see Context Menu on page 45.

- ⌄ (**Display Details**): Displays the record's details, see Display Details.

Result Lists

The following screenshot shows the results of a search:

If the list contains a large number of columns, the text in the column headers and cells may be shortened with "..." displayed at the end of the text. Move the mouse cursor over the cell to display a tooltip containing the contents of the cell.

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

You can edit records in the results list as well in lists displayed under **Related Data**, see Editing Records in List View on page 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.
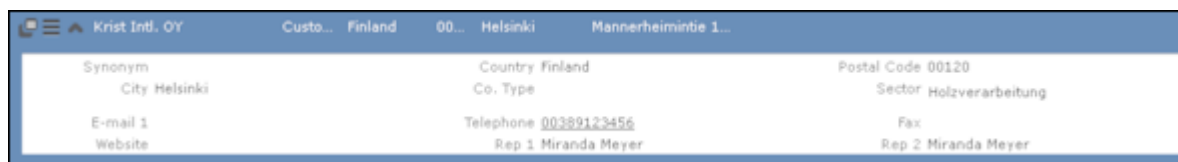
- Click on ▲ (**Hide Details**) next to the desired record to hide the details of that record.

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).

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:
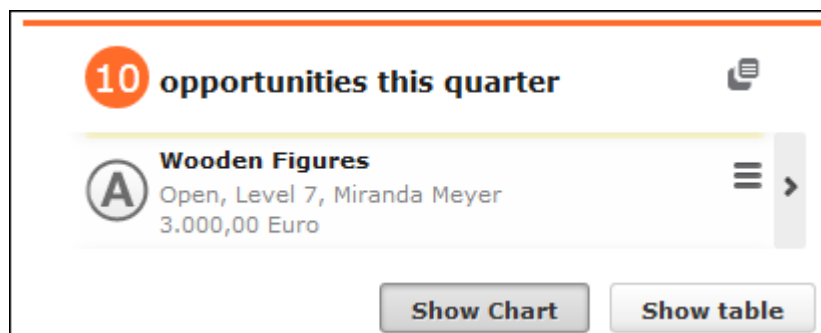
The live tile consists of two elements:

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

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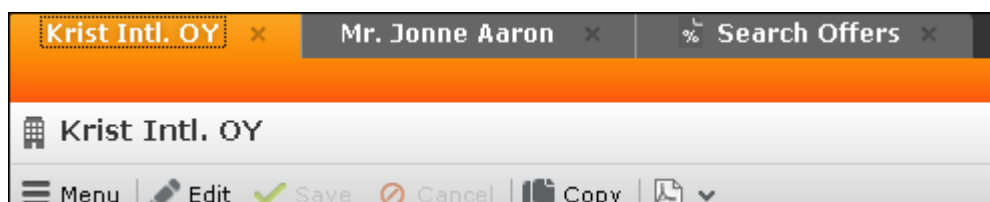
2. Click on a tab at the top of the screen to switch to that tab.

   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 ◄ (**Previous**) and ▶ (**Next**) buttons to scroll. Click on ▼ (**Show all tabs**) to display a list of all open tabs:
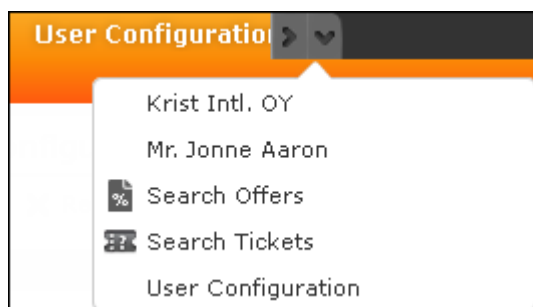
   Select an entry from the list to switch to that tab.

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

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

You can configure the layout of areas on the screen.

To change the layout:

1. Click on ⌄ and choose an option:

   • ▭ (**one column**): Areas are displayed beneath one another spanning the entire width.

   • ▯▯ (**two columns**): Areas are split over two columns.

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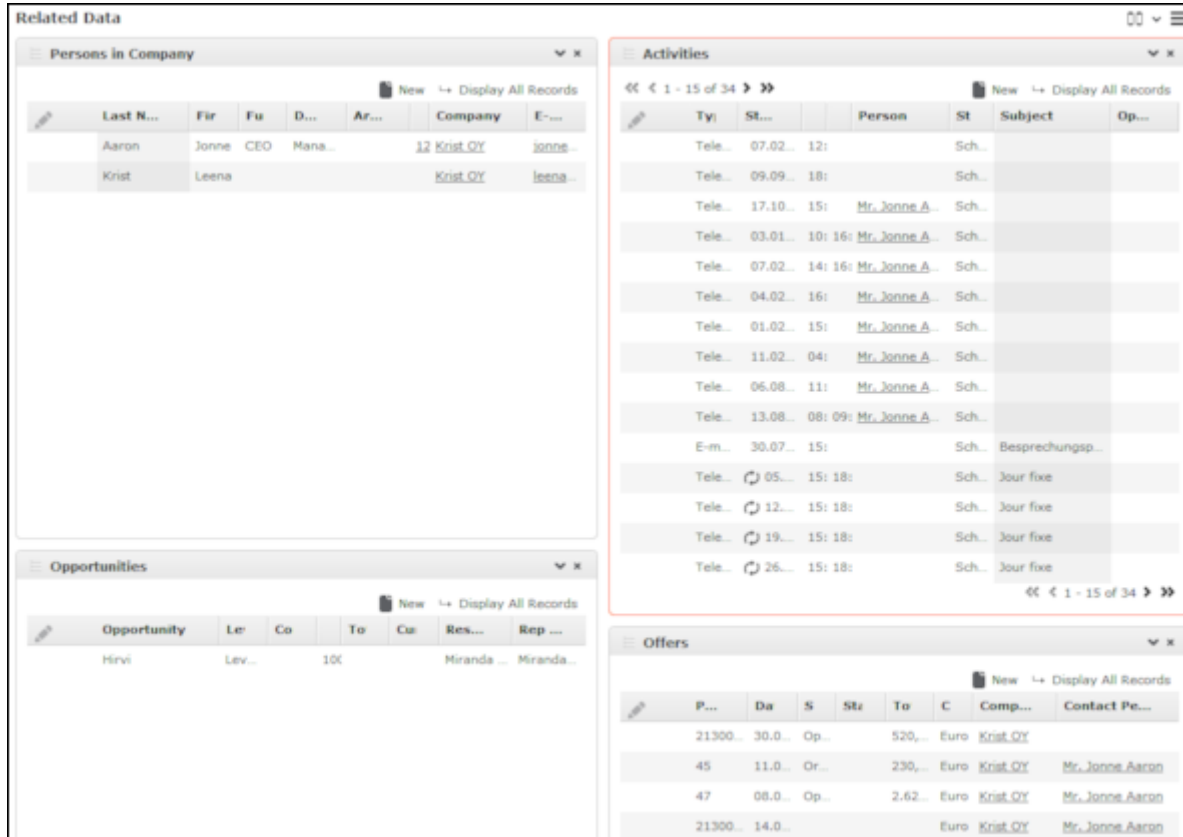
- ■ (**tabbed**): Displays the areas in separate tabs.

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

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

To change the order of areas:

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

2. Release the mouse button.

Links

Various fields are displayed as links in Aurea CRM web.

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

By default, links are displayed underlined.

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:
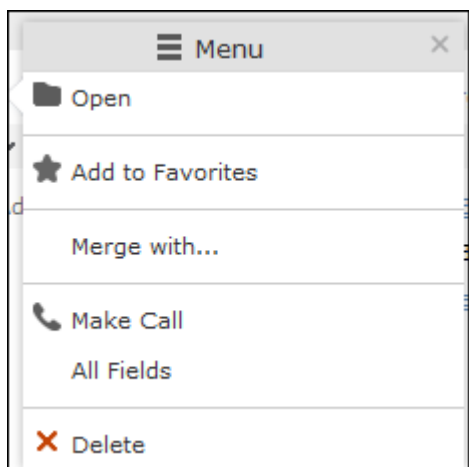
Date Picker

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 ﹀ button is displayed. Click on this button to increase the size of the text field to display the full contents.

Numeric Fields

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

Catalog Fields (Drop-down Lists)

Catalogs are displayed as drop-down lists.

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

Your administrator can determine how catalogs are sorted:

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

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

To select an option from a drop-down list:

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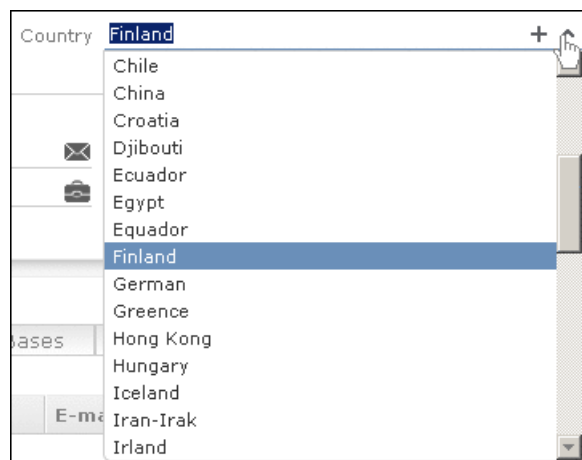
2. Select the option you want to enter in the field. Alternatively you can navigate in the drop-down list by typing the first character (e.g. typing 'F' highlights the "Finland" entry). If you select a value, the drop-down list is closed.

Adding Catalog Values

To add catalog values:

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

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

2. Enter the new catalog value in the text field.

3. Click on **New** to add the entry to the catalog.

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

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

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

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

Multiple Catalog Values in a Field

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

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

To enter multiple catalog values:

1. Click on the catalog field or the downwards arrow next to the field.

2. The drop-down list is displayed.
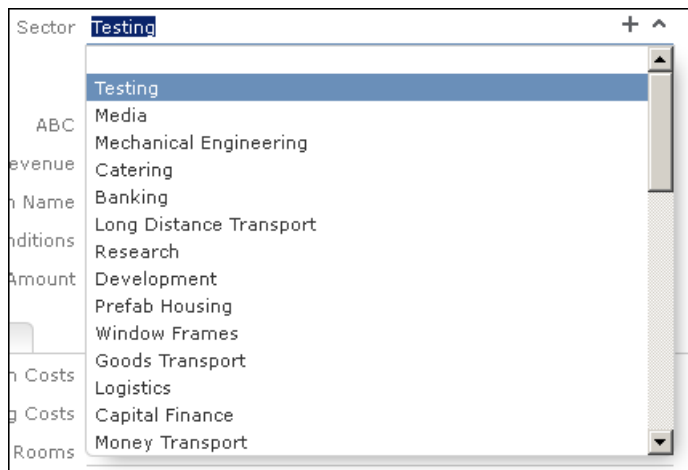
3. Select the desired entry. Depending on your access rights, you may also be able to add new catalog values when needed. To do so, click on **+** (**Add/Find Catalog Values**).

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

Date Fields

You can enter the date in date fields directly or use the pop-up calendar, 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

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.

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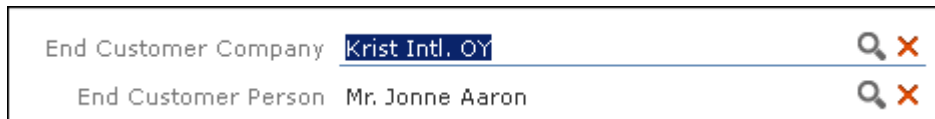
Boolean Fields

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

Link Fields

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

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

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

Your administrator can determine that

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

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

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

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

Displaying Percentage and Catalog Fields Graphically

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

Catalog Field Examples

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

or

or

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

Percentage Field Examples

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

Default slider:

Slider for positive and negative values:

To enter a percentage value:

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

HTML Fields

HTML fields allow you to enter and format content using an HTML editor. Your administrator can add HTML fields to info areas. The most common formatting options, e.g. bold, italics, numbered lists etc. are available. When sending e-mails the text is sent as HTML.

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

Example:
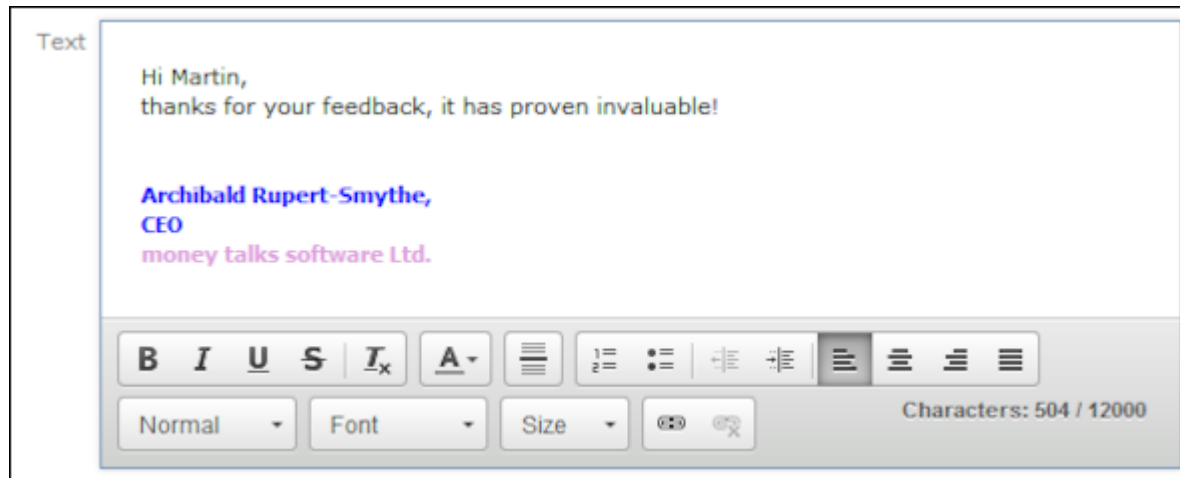
Field Data Types

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

The following data types are available:

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

Displaying Content from Multiple Fields in a Single Field

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

Address Vorgartenstraße 40
1020 Wien, Austria

The fields are displayed separately in edit mode:

Street	Vorgartenstraße 40	
Postal Code	1020	🔍 ✕
City	Wien	
Country	Austria	➕ ⌄

Field Help

Learn about the Field Help user interface.

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

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

Example:

Company Megabucks FC

Name of the company

In this field you should enter the legally correct name of the company. This includes entering the company name as well as the legal form of the company (e.g. update Software AG).
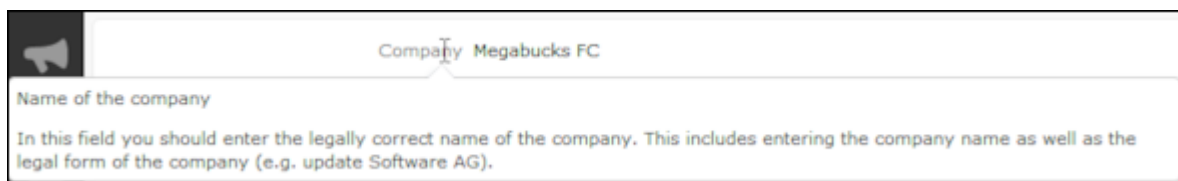
Write-protected Records and Field Access

This topic explains Write-protected Records and Field Access.

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

Access to data is indicated as follows:

• **Access denied** is displayed in fields to which access is denied in list view.

• If access is denied to the entire record, an icon is displayed on the left border whose tooltip is "[info area name] cannot be edited."

You can only move the cursor to those fields that you are allowed to edit.

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 ✉ (**Send as E-mail**) in a record.

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

  - To: The name of the contact person and the name of additional participants (e.g. in an appointment) and the responsible rep.

  - Cc: The current rep (the one sending the e-mail)

- Subject: The activity's subject
- Text: The contents of the **Text** field in the activity record.

When sending e-mails via the server:

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

When sending e-mails from your client:

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

Notifying Reps

Learn about notifying reps user interface.

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

To notify reps:

1. Switch to the desired record, e.g. an activity.

2. Select **Notify Rep** from the context menu.

    The following dialog box is displayed:

3. The following recipients are suggested by the system:

   • Recipients: The rep entered in the record and the contact person or company's e-mail address

   • Cc: All required participants

   • Bcc: All additional participants (optional and for information)

4. You can enter **Additional internal recipients**, >>

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.

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

9. Click on **Send** to send the e-mail.

Hiding/Showing the CRM.phone toolbar

Learn how to hide/show the CRM.phone toolbar.

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

1. Click on to display the CRM.phone toolbar.
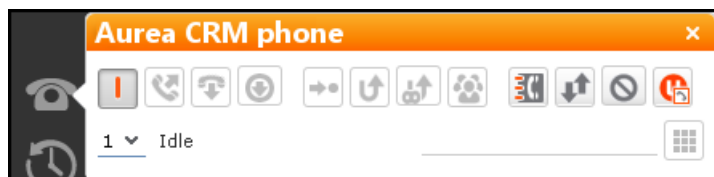
2. Click on (**Close**) to hide the toolbar.

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

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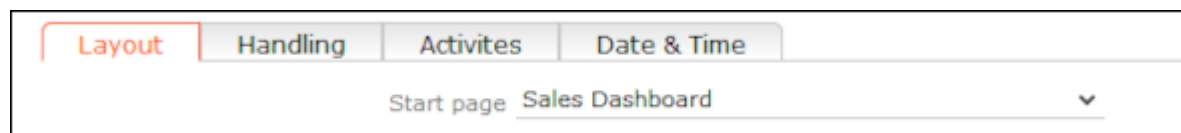
Start page: Select the start page here; i.e. the page that should be displayed after you have logged on to Aurea CRM web. You can choose to display generic pages (e.g. the company search) as well as predefined start pages (e.g. marketing home page, sales home page).

Handling Tab

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 ✔ 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:

- **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**.
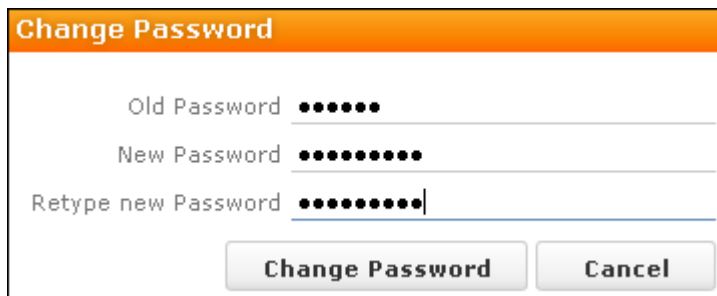
- **Digit grouping symbol**: Determines the character used to separate millions, thousands etc. You can choose between "**,**", "**.**", "**'**", **Space** and **Server**.

- **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 ![wrench icon] (**Settings**) > **Change Password** from the menu.

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

3. Click the **Change Password** button. A message appears informing you that your password has been changed successfully.

System Information

Settings: Learn about System Information function.

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

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

1. Select ![wrench icon] (**Settings**) > **System Information**. The system information dialog box is displayed.

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

---

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

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

Searching

Learn about the search function in Aurea CRM web.

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

The search functions are defined in below topics:

Search Area

Learn about the search area function.

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

by selecting (**Master Data**) > **Accounts**):

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

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

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

• **Clear Search Criteria:** Removes all search criteria. If you have added additional fields to the search mask, those fields continue to be displayed.

• **Reset Search Settings:** Resets the search mask to the default settings defined by your administrator. The search criteria you have entered are removed and any fields you have added to the search mask are also removed.

Searching For Data

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 ⌄ next to **Add more**.
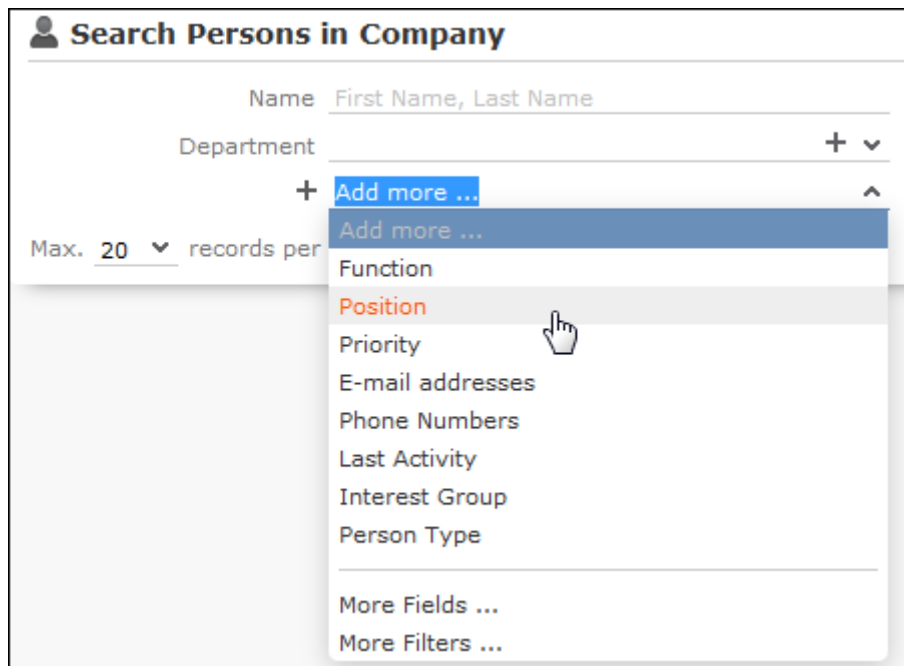
2. Select the desired field and click on **+** (**Add**) to add the field to the search mask.

3. If the field you want to use is not in the list, select **More Fields** from the list. A dialog containing all fields you can access is displayed.
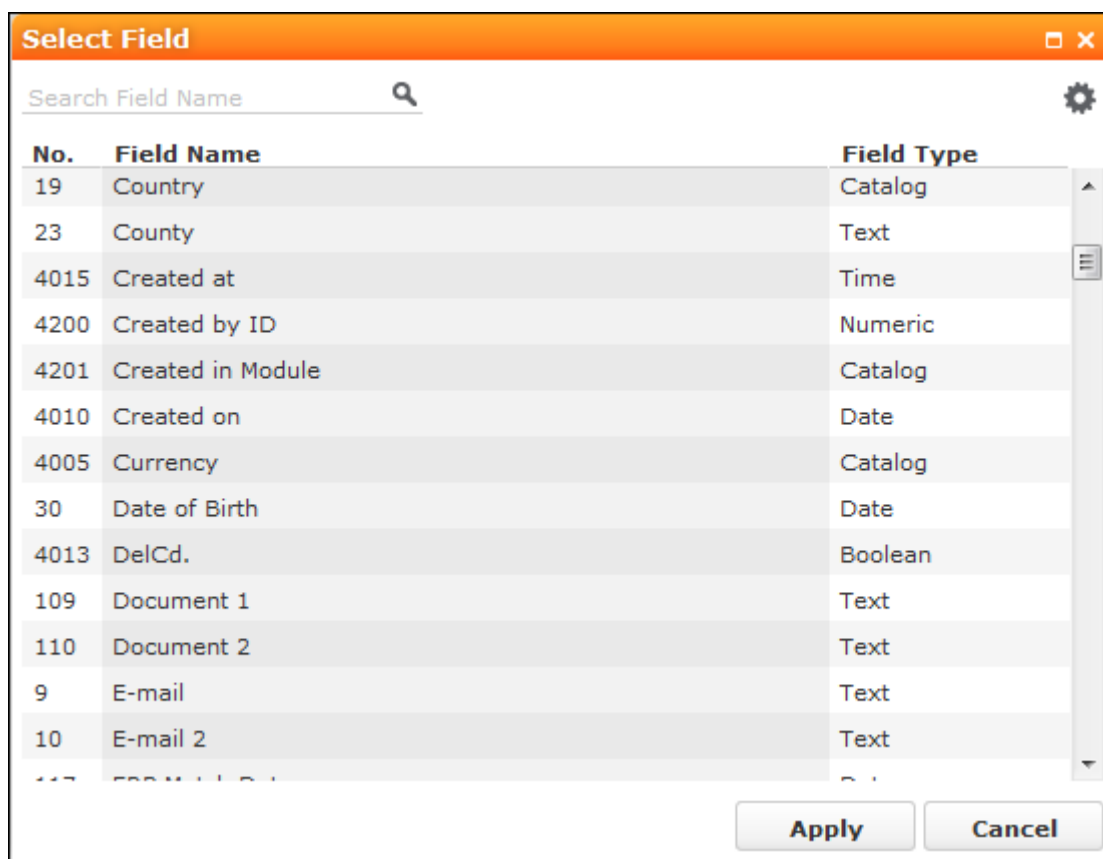
4. Select the desired field and click on **Apply**.

Searching in Combined Fields

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

Name First Name, Last Name

If you enter a search criteria in a combined field, the system searches for matches in both fields:
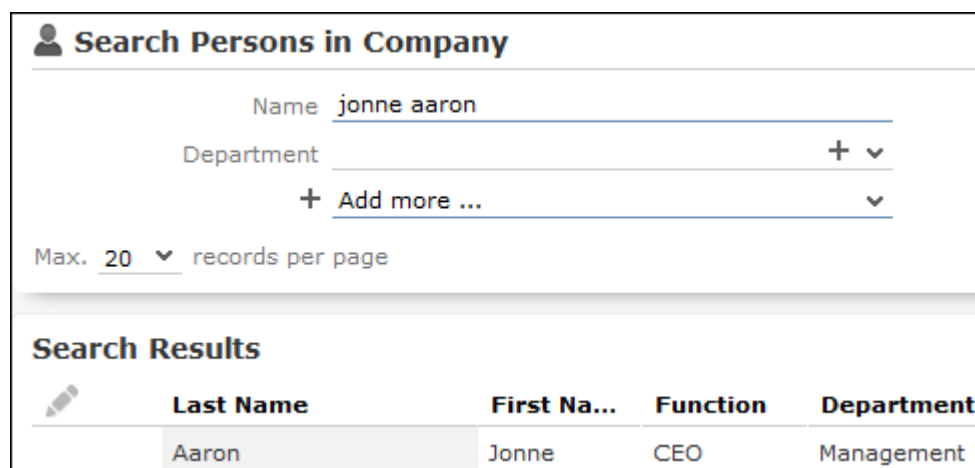
You can enter multiple search terms (e.g. first and last name) in the combined field.

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.

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.

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

Selecting Filters

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

To select a filter:

1. The available filters can be accessed from the drop-down field below the search fields. Select the desired filter from the drop-down list.
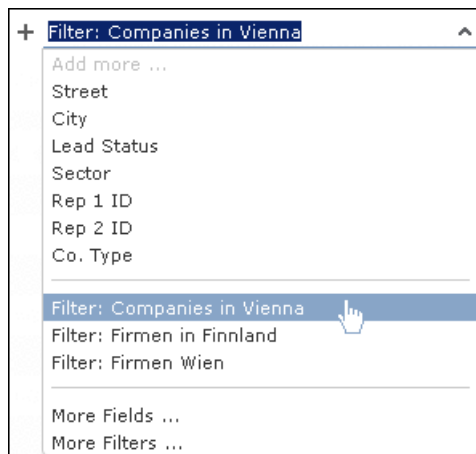
2. Click on **+** (**Add**) to add the filter to the search criteria. The filter is applied when searching.

Defining Filters

To define a filter:

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

   The **Filter** dialog is displayed.
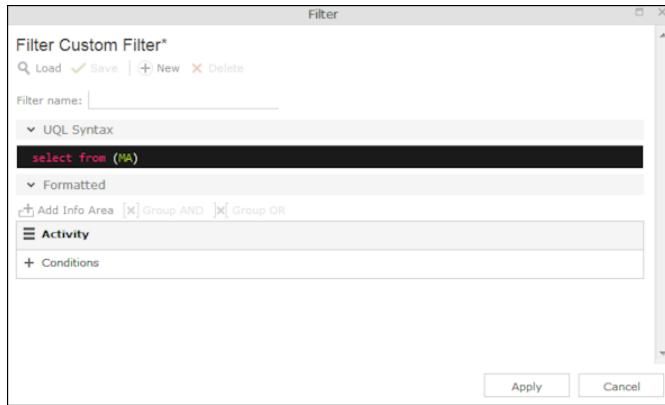
2. Click on ⊕ (**New**) to define a new filter. Click on **Load** to load an existing filter.

You can define filters in two ways:

- As AQL (Aurea Query language) in the **AQL Syntax** field. For more information on the AQL syntax, >> Aurea CRM web Administrator Guide.

- Using the graphical user interface to select fields and enter filter criteria. This method is described in this manual.

3. Select **Add Condition** from the info area or condition's context menu to define a condition.
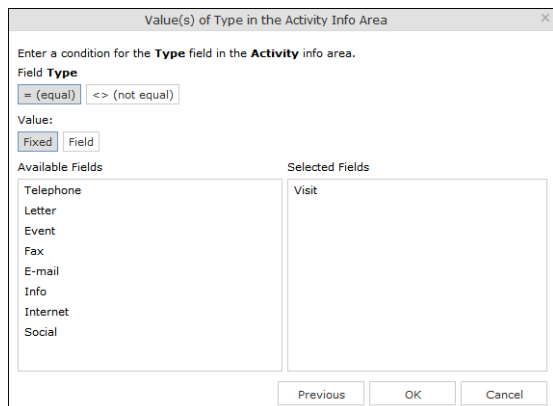
The **Select Fields in Info Area: <Info Area>** dialog is displayed. All available fields in the info area are listed.
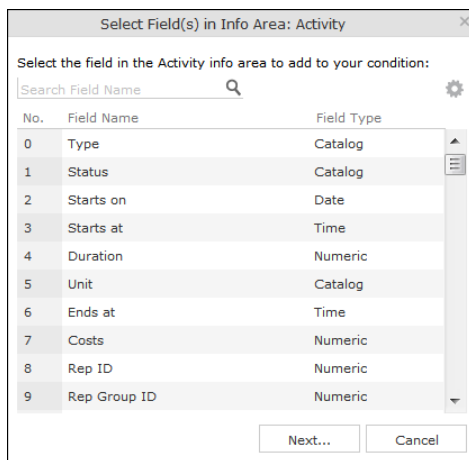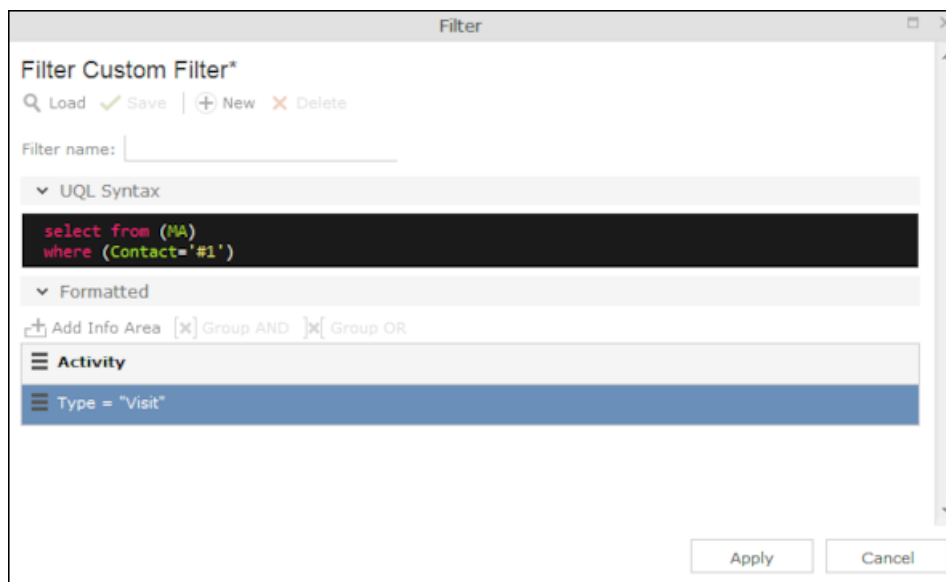
4. Click on a column heading to sort the list by the entries in that column.

5. Click on ⚙ (**Show/Hide Columns**) to determine which columns are displayed in the list.

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

- Enter one or two letters to list all fields whose name begins with those letters.

- Enter three or more letters to list all fields whose name contains the text you have entered.

You can also search for fields by field number.

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

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

- Text fields, see Conditions for Numeric, Alphanumeric and Time Fields
- Date fields, see Conditions for Date Fields and Variable Conditions
- Catalog fields, see Conditions for Catalogs and Conditions for Child Catalogs
- Numeric fields, see Conditions for Numeric, Alphanumeric and Time Fields
- Boolean fields, see Conditions for Boolean Fields
- Time fields, see Conditions for Numeric, Alphanumeric and Time Fields
- Rep fields, see Conditions for Rep Fields and Variable Conditions

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

10. Define any additional conditions:.

   a. Click on ☰ next to an existing condition and select **Add Condition** from the context menu.

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

11. You can apply the filter without saving it, however it 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.

Q▾ Search

☐
Select all

☑
Companies

☑
Persons

☑
Activities

☐
Opportunities

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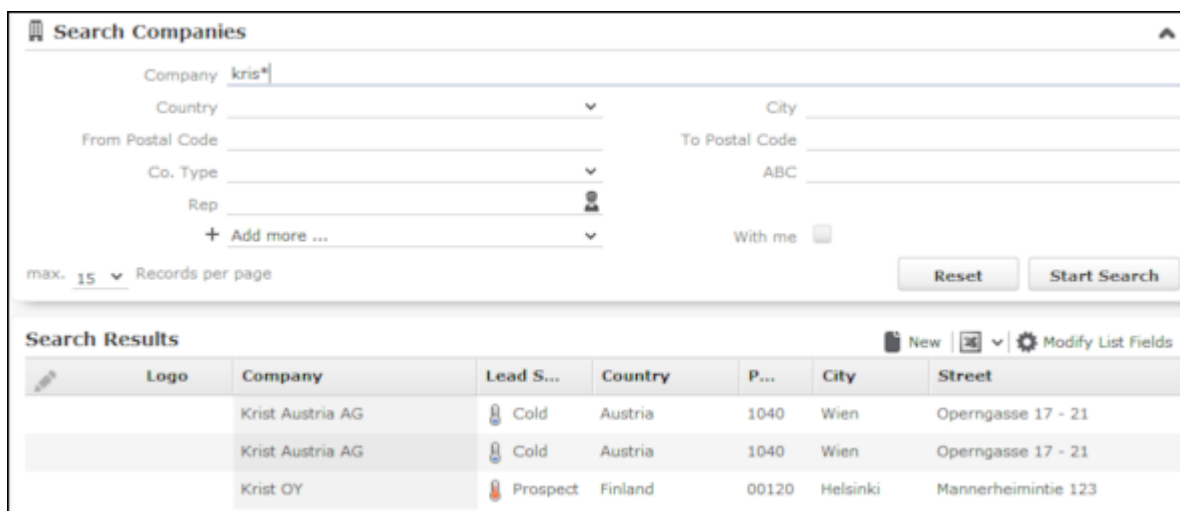
If a query returns more results than can be displayed on a single page, use the navigation bar to scroll through the rest of the list, >> Navigation Bar.

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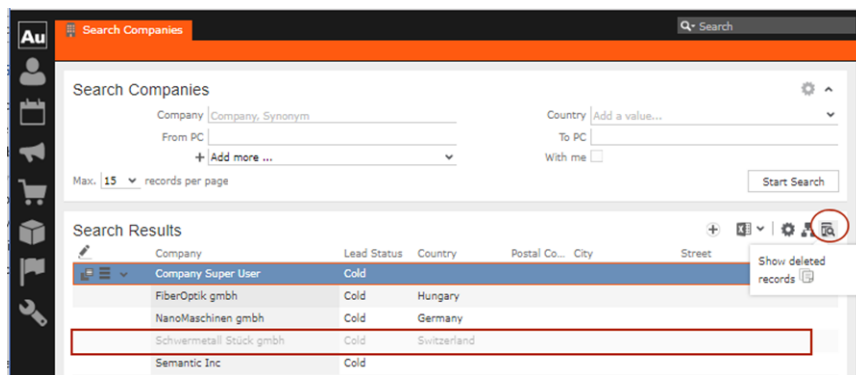
If the button is not visible contact your system administrator to configure and provide access to view deleted records.

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
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.

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.

2. Drag the separator to the desired position.

Selecting the Fields in the List

You can determine which fields are displayed in the list.

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

To select fields:

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

The **Modify List Fields** dialog is displayed:
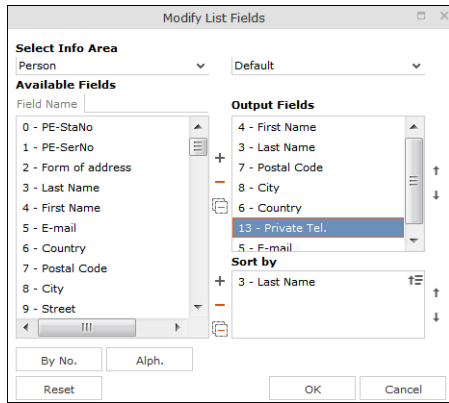
The info area that you accessed the search for is entered in the **Select Info Area** field.

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

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

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

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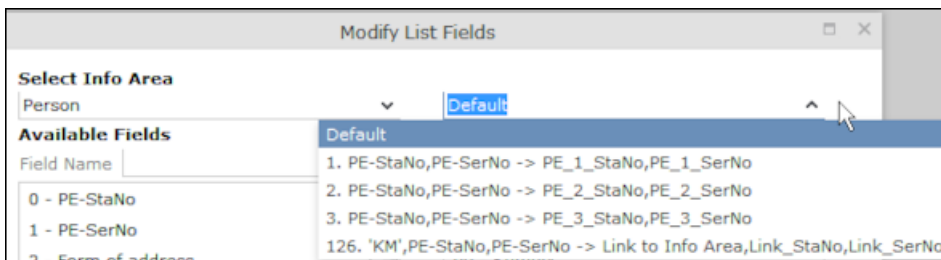
  If only one link is available, only the **default** option is available.

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

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

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

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

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

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

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

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

---

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

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

Adding Records

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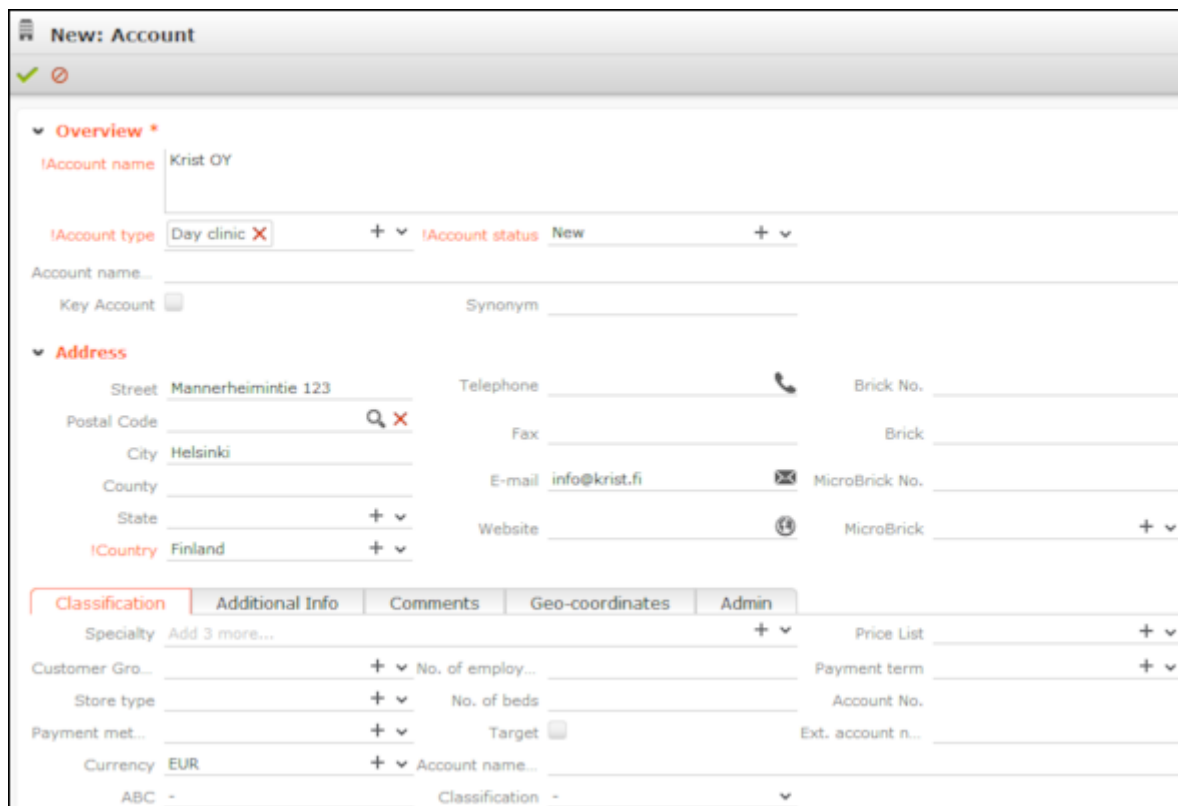
In certain info areas, such as **Account** or **Person**, Aurea CRM web matches up new data with existing records to prevent duplicate records from being added to Aurea CRM's database, see

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 ![icon](Master Data) > **New Account** from the menu to open the search area.
2. Click on **Search**.
3. Click on ⊕ (**New**)in company search's results list.

    The **New: Company** page is displayed.

4. Enter all the relevant information.
5. Click on ✔ (**Save**). Aurea CRM web automatically checks whether the company is already stored in the database, see Match-up on page 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.
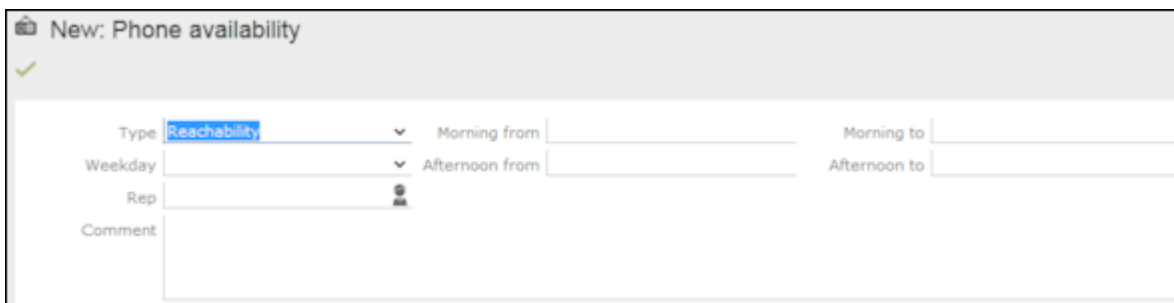
  You can add new child records in the tree view of a record (e.g. a person) using the child info area or child records' context menu (e.g. a contact times).

  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 ⊕ (**New**) in the results list.

  4. The new record mask is displayed.

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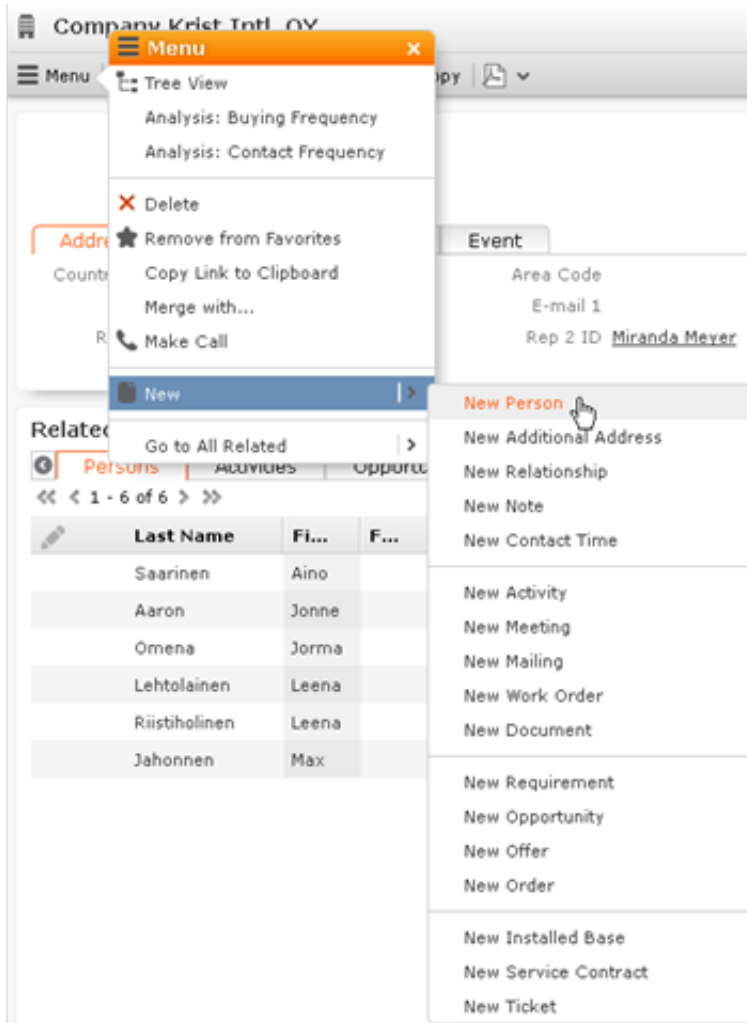
As it is clear which record is the parent record in this case, you are immediately switched to the mask where you can enter the new record's data. Proceed as with independent records, see Adding new Independent Records.

Example: Adding a new Person within a Company

To add a new person to a company:

1. 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.
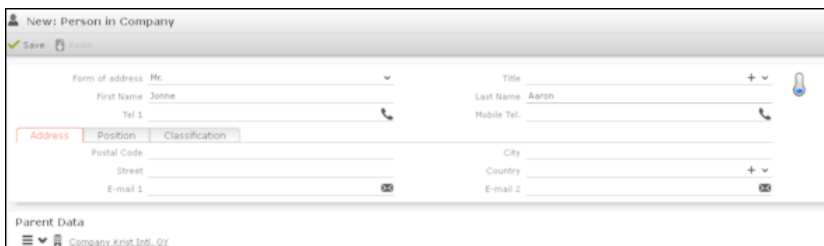
2. Enter the person's data.

3. Save the record. The record is displayed in the default view.

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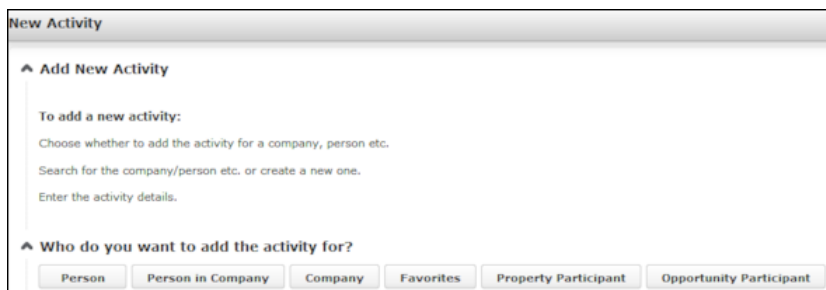
You are guided through the steps of adding new records in various info areas, in particular if new records cannot be added directly due to a lack of information. For example, an activity can only be added if a company or person has been selected.

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
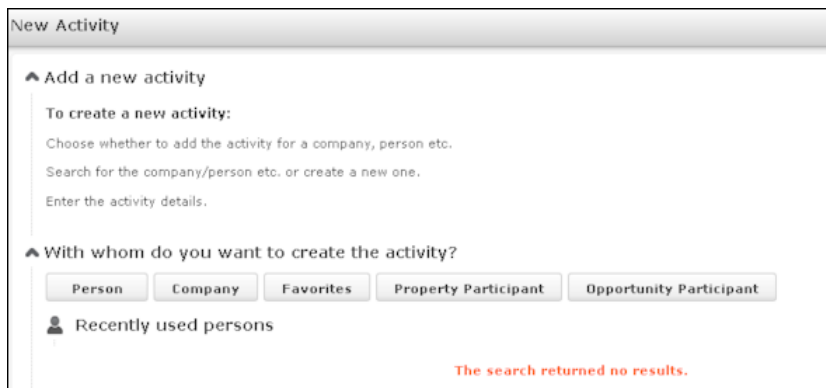
To add a new activity:

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.

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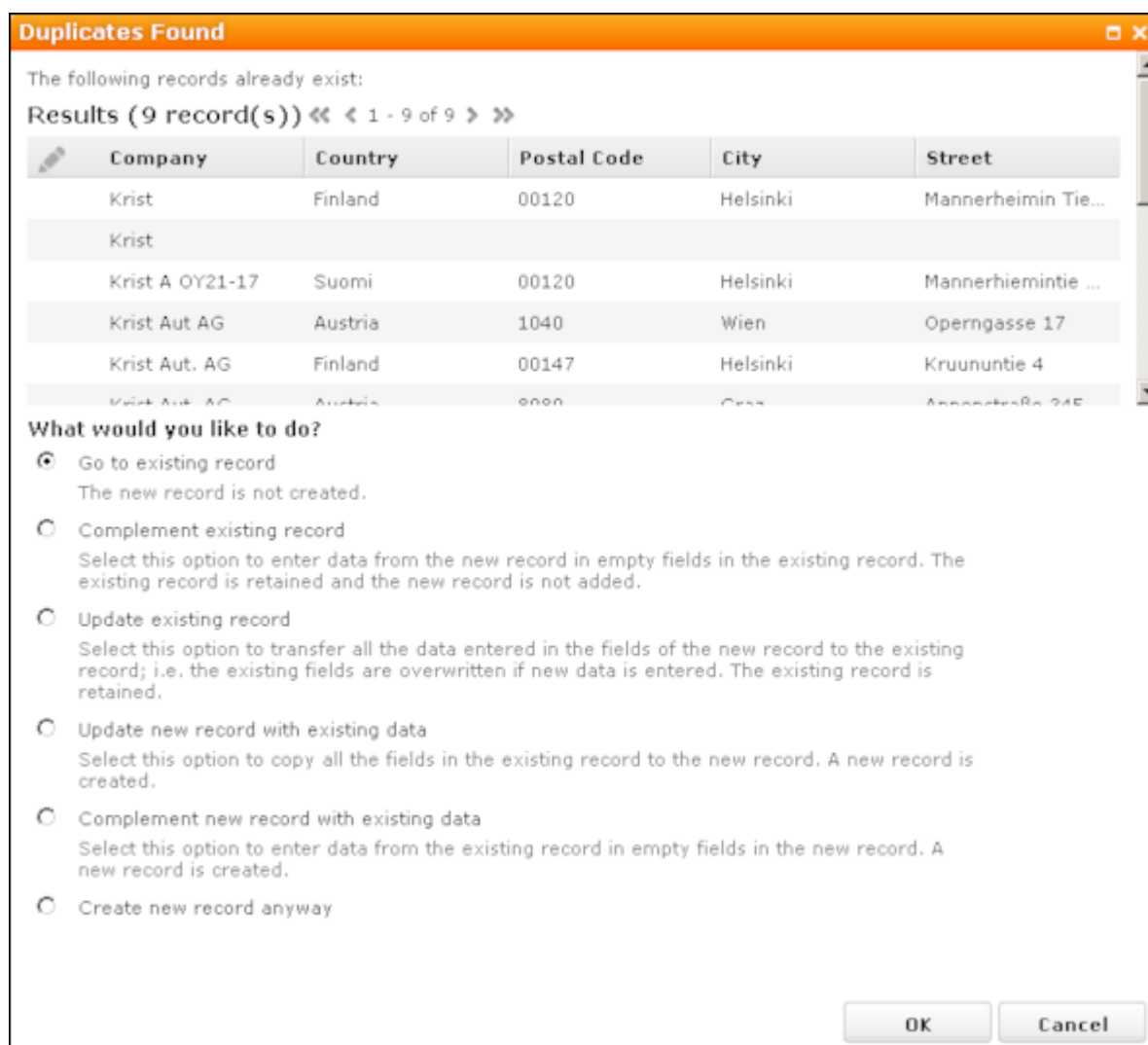
Select one of the available actions and click on **OK**.

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.
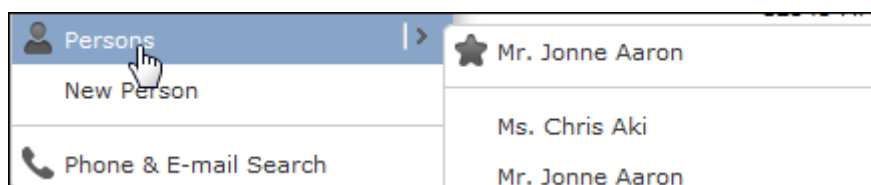
You can edit records in list and tab view. You are asked to confirm the deletion of records, see Editing Records in List View on page 86, Editing Records in Tab View on page 84 and Deleting Records on page 89.

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
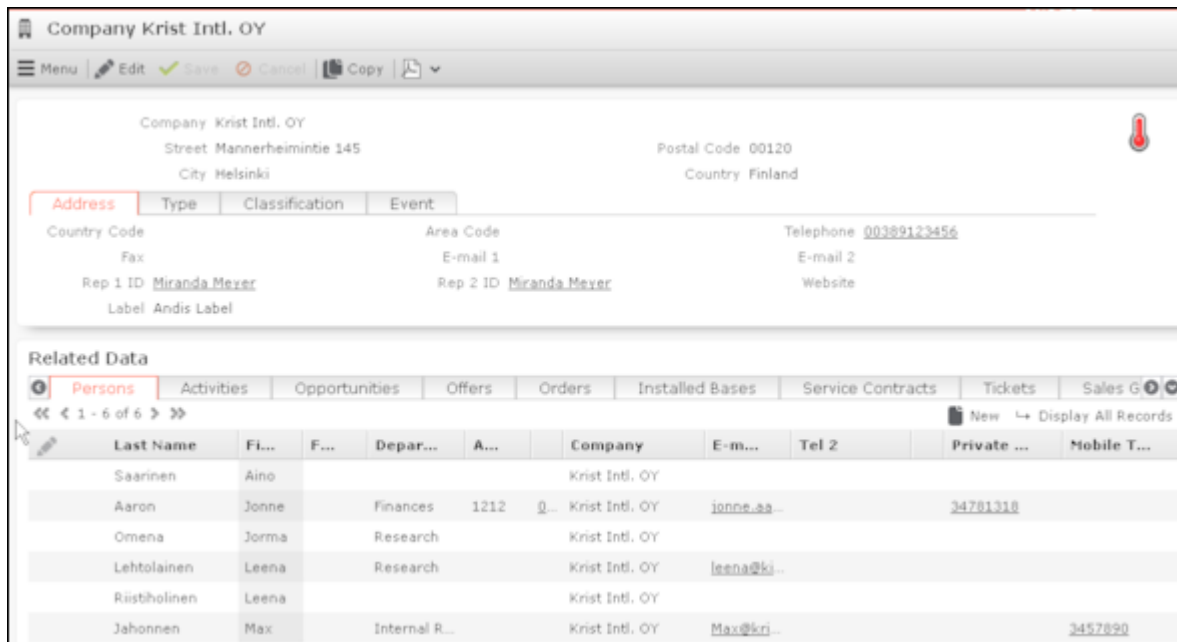
Learn to edit records in Tab view.

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.

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.
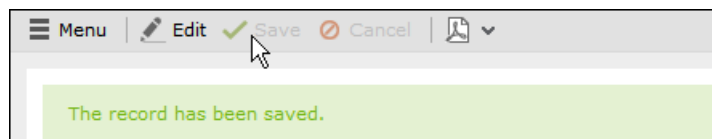
Additional messages such as system messages or information that a record has been added to your favorites are displayed in the inbox, see Inbox.

Buttons in the Tab View

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

- Click on the **e-mail** icon ✉ to the right of the e-mail address to send an e-mail.

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

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

- Click on a URL to access the company's website entered in the company record.

- Click on 👤 to enter a rep using the rep catalog.

- Click on 📞 (**Make Call**) while in edit mode to call the number using CRM.phone. CRM.phone must be installed to use this button.

    If several telephone numbers have been entered for a company or person, your administrator can determine that you can select the desired number from a list.

- Click on 🔍 to link the current record **with a record in another info area.** The search dialog is opened, allowing you to search for the record you want to link to. Double-click on the desired record or choose **Select** from the context menu to confirm the link.

- Click on **+** (**Find or Add Catalog Values**) to search for or add catalog values.

- Click on ⌄ (**Select Date**) next to a date field to open the date picker.

Editing Records in List View

Learn to edit records in List View.

To edit records in list view:

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

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

   • Select catalog values from the drop-down list, see Catalog Fields (Drop-down Lists).

   • Select reps from the dialog box, see Rep Fields.

   • Use the small calendar to enter dates, see Date Fields.

   • Click on 🔍 (**Select**) next to a link field to select a record in another info area, see Link Fields.

2. Click on the **Save** button (✅) to the left of the record you are currently editing to save your changes, or click on the **Cancel** button (🚫) if you wish to cancel any changes.

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

Editing Multiple Records in the List Simultaneously

Selecting Multiple Records

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

• Press the Ctrl key and select the desired records using the mouse.

• Press the Shift key to select **all** records between the current record and the record you subsequently click on.

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

Editing Multiple Records

To edit multiple records in a list:

1. Select the desired records, see Selecting Multiple Records.

2. Click on ☰ (**Show Menu**) next to one of the selected records. The context menu for editing multiple records is opened.

3. Select **Edit** from the menu. The fields displayed in the list view are displayed:
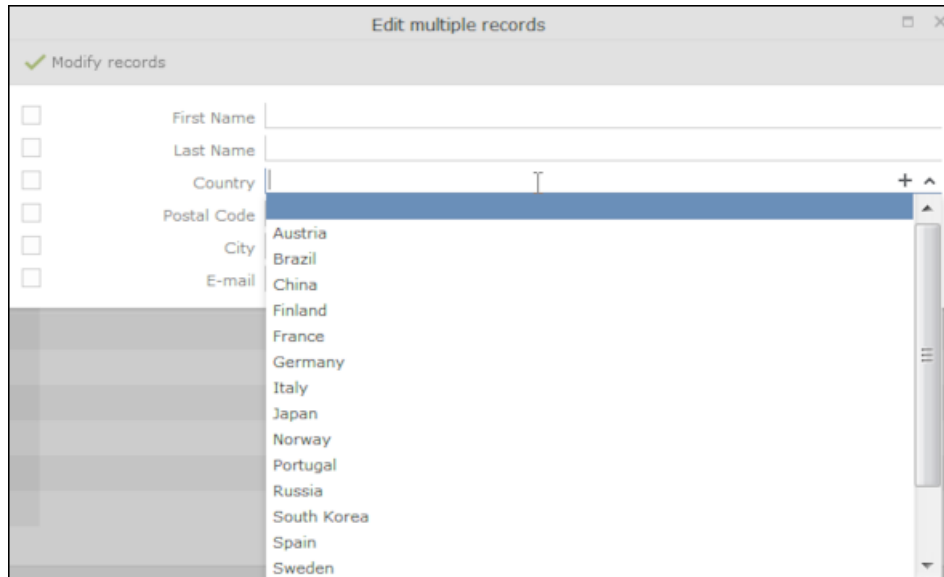
If all selected records contain the same value in a field, the vale is displayed. Otherwise the field is empty.

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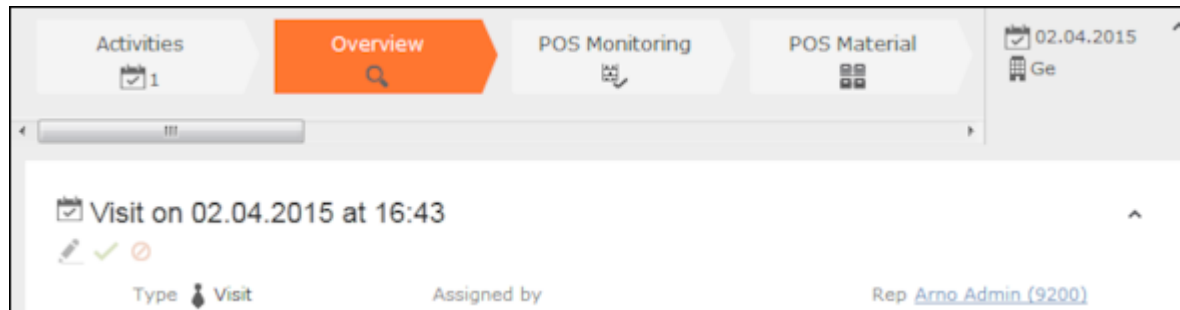
Depending on the process, you may be able to switch back and forth between phases, or may only be able to proceed to the next phase once you have completed all the necessary tasks.

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.
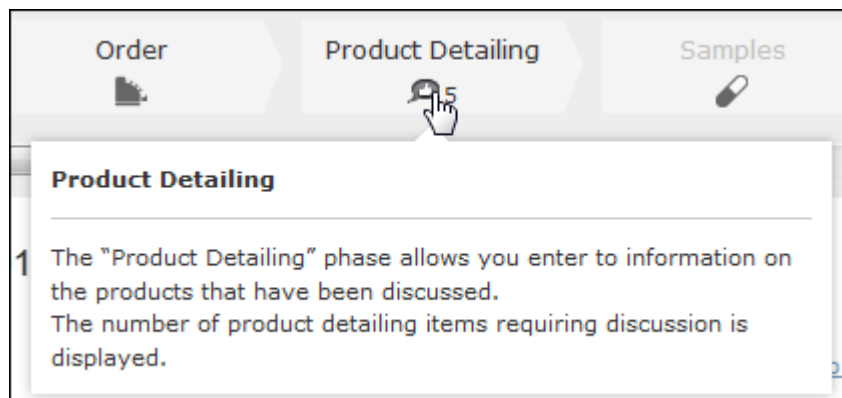
Linking Records

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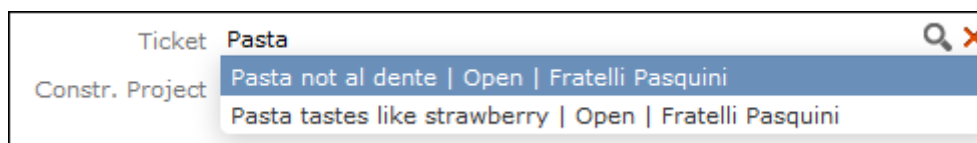
- Click on 🔍 (**Select**) to search for the desired record. Select the search context before starting the search. Your administrator can determine whether you can choose to search for the target record in the current context (i.e. a record related to the current record or its parent record) or in the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

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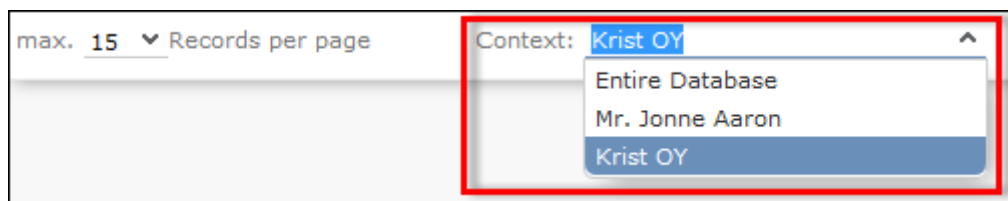
Deleting Records

This topic explains deleting a record.

To delete records:

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

2. Click on ☰ (**Show Menu**)to the left of the desired record to open the context menu.

3. Select **Delete** from the menu.

4. Confirm that you want to delete the record.

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

Copying the Link to a Record to the Clipboard

This topic explains Copying a Link to a Record to the Clipboard.

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

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

To copy a link to the clipboard:

1. Switch to the desired record (in tab view) or select the desired record in list view.

2. Select **Copy Link to Clipboard** from the context menu.

3. You can then paste the link from the clipboard into another application.

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

Displaying a Record's History
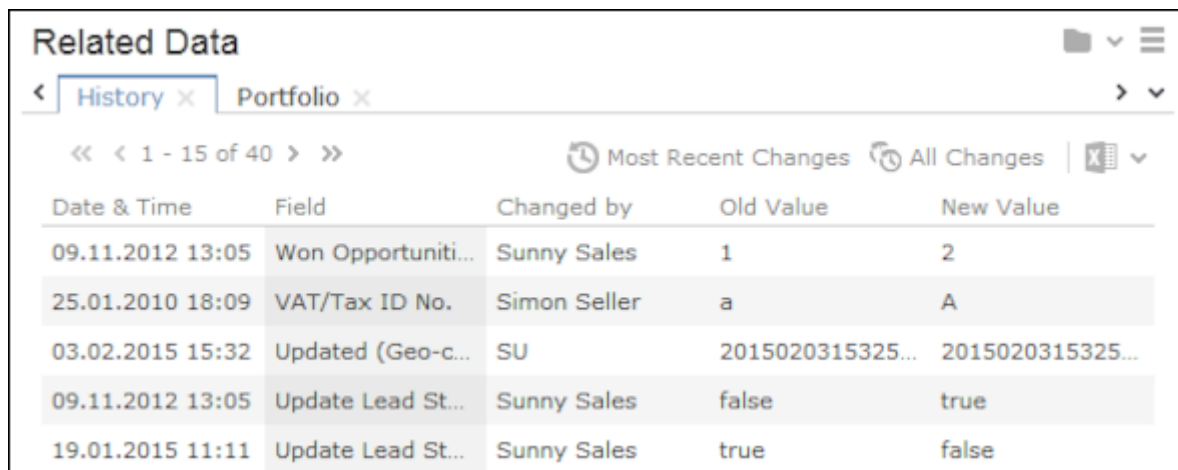
Learn how to display a record's history.

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				
History ×	Portfolio ×			
« ‹ 1 - 15 of 40 › »		Most Recent Changes	All Changes	
Date & Time	Field	Changed by	Old Value	New Value
09.11.2012 13:05	Won Opportuniti...	Sunny Sales	1	2
25.01.2010 18:09	VAT/Tax ID No.	Simon Seller	a	A
03.02.2015 15:32	Updated (Geo-c...	SU	2015020315325...	2015020315325...
09.11.2012 13:05	Update Lead St...	Sunny Sales	false	true
19.01.2015 11:11	Update Lead St...	Sunny Sales	true	false

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

• Click ⏱ (**Most Recent Changes**) to display the most recent changes to each field. Edits are sorted by date and time.

• Click ⏱ (**All Changes**) to display all changes. Edits are sorted by field name.

Exporting

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

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

Examples:

- Microsoft Excel (current page)

- Microsoft Excel (all records)

- Microsoft Word

- HTML (corresponds to a web-based print preview)

- PDF (the document cannot be edited).

All fields (including empty fields) are exported.

Exporting from Tab View

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

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

Exporting from a List

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

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

To export data in a list:

1. Search for the records you want, e.g. all companies in Austria.

2. The default export functions are available by clicking on ⊠ ⌄.

3. Click on ⌄ and select the desired option, e.g. ⊠ (**Export (MS Excel)**.

4. Save the file.

5. Enter a name for the file and choose the desired directory to save it in.

6. Click **Save**.

The records are exported to the file.

Reps

Reps are people that manage data in the CRM system.

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

Selecting Reps

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

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

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

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

Selecting Reps from the List

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

To select a rep from the list view:

1. Click on the ▲ (**Select Rep**) icon to the right of the field. The **Select Reps** dialog box is displayed.
2. Click on a letter or enter the start of the rep's name and click on **Find**.

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

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

Selecting Reps with the "Find as you type" Function

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

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

1. Enter all or a portion of the rep's name in the **Rep** field. Depending on your configuration, the following entries are listed:

   • Reps whose names begin with these letters.

   • Reps whose name contains the text.

   A list containing all matches is displayed.
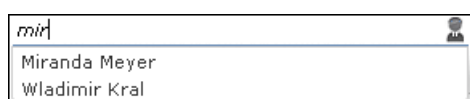
If only one match is returned, the name of the rep is automatically completed.

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

   The selected name is entered in the rep field.

Selecting Reps from the Tree View

To select a rep from the tree view:

1. Click on the ⚊ (**Select Rep**) icon to the right of the field. The **Select Reps** dialog box is displayed.

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

Single-tier tree	Multi-tier tree
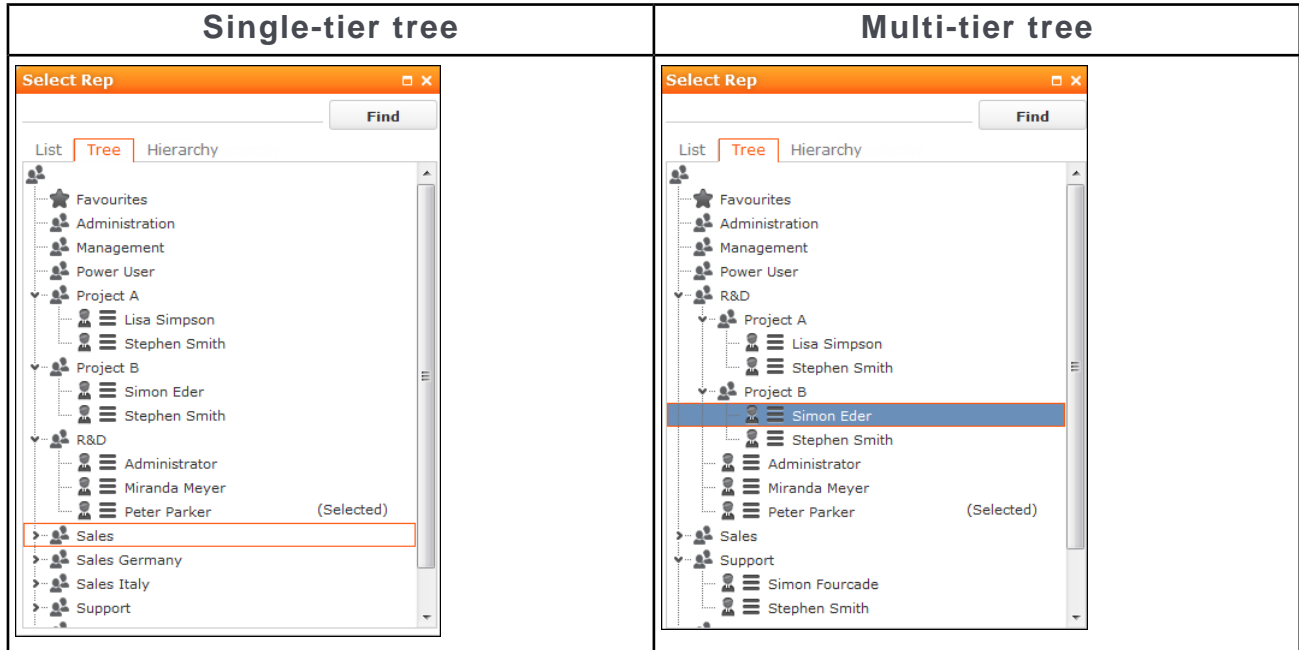
3. The reps are displayed in tree view. Each rep is accessible from the group they have been assigned to. Use the ❯ and ❯ to expand or contract the tree structure and display the reps allocated to a group.

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

Rep Favorites

Learn how to set certain Rep as favourite.

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

To add a rep to your favorites:

1. Search for the rep.

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

Participants and Roles

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

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 ⊕ (**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 [101] (**Default Values**) in the activity search.

2. Define the default values.

3. Click on ✔ (**Save**) to save the default values.

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

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

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

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

The default values are saved, and you are asked if you 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.

2. Click on 🔍 (**Load**) in the **Default Value** dialog box. The **Load default values** dialog box is displayed.

3. Select the set of default values from the list and click on **Load**.

4. Click on ☑ (**Apply**) to use the default values automatically in future when adding new records.

Resetting Default Values

To remove default values that have been defined:

1. Click on ⌊101⌉ (**Default Values**) in the search mask.

2. Click on ✖ (**Reset**).

3. Confirm the prompt with **Yes** to continue working without default values.

The default values are reset to the standard settings.

Calendar

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

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:
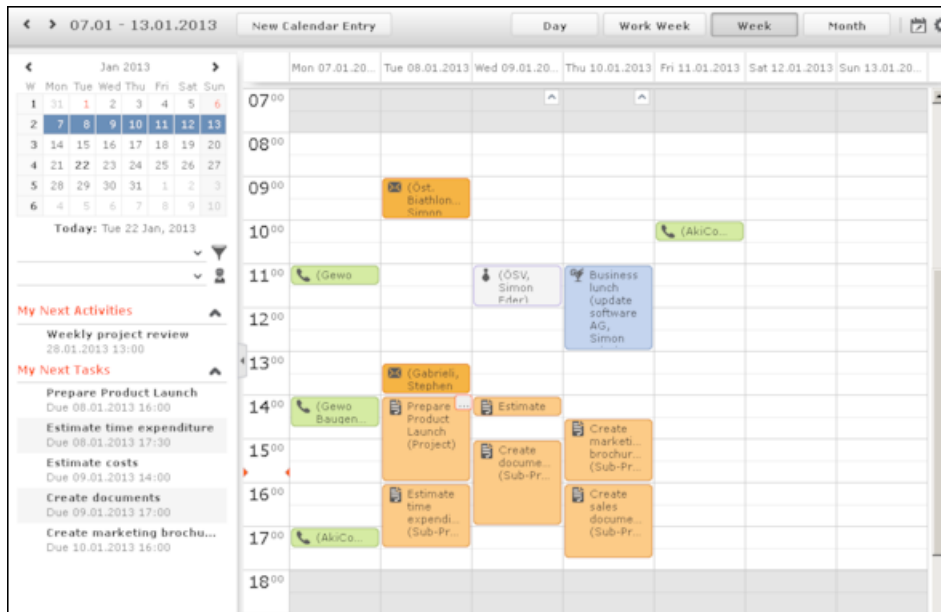
- Different types of appointment are indicated using different icons (for telephone calls, visits etc.).

- You can determine that certain entries are color-coded, e.g. based on the type of appointments or status (⚙ (**Edit Settings**)).

- Click on the entries in the header to determine whether to display a **Day**, **Work Week**, full **Week** or **Month** in the calendar.

- The orange cursor in the time bar indicates the current time.

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

- Appointments lasting all day or spanning several days are displayed in a bar at the top of the calendar (below the date).
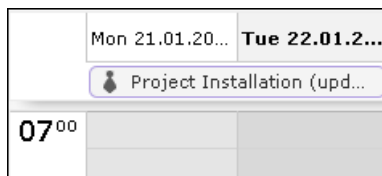
- Concurrent appointments cannot be displayed in the week view of the calendar. Click on "…" to display these appointments in a new window.
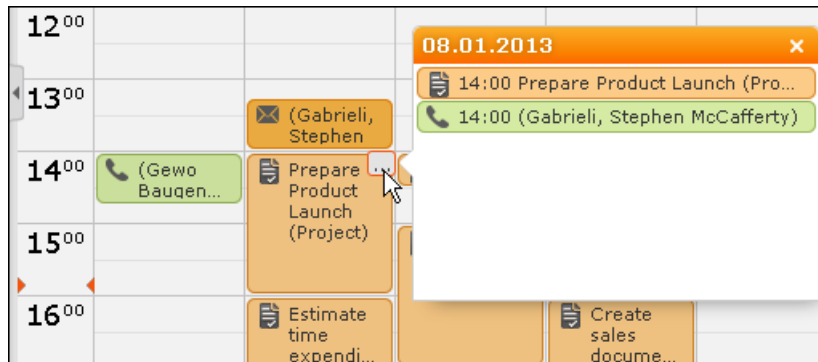
- Only a limited number of appointments can be displayed per day in the monthly view. Click on **+ x more** to display all the appointments in a separate window.

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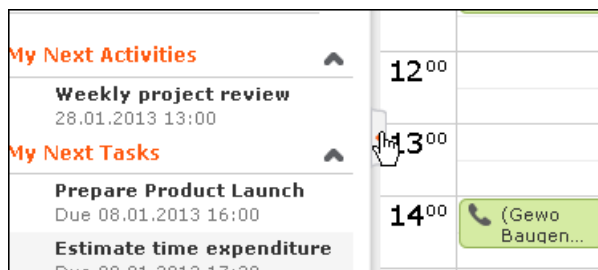
  Your upcoming activities, tasks and any absences are displayed in the left sidebar by default. You can also select and define filter sets or rep groups.

- 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.
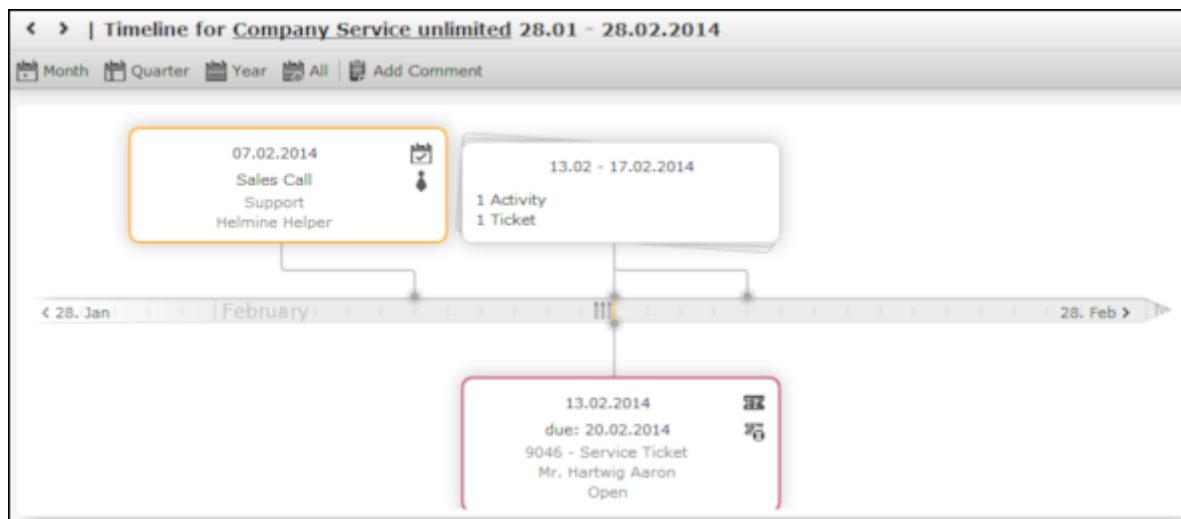
3. Click on to select the time period that is displayed in the timeline: **Month**, **Quarter**, **Year** or **All**.

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 (**All**) 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 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:

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.

2. 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.
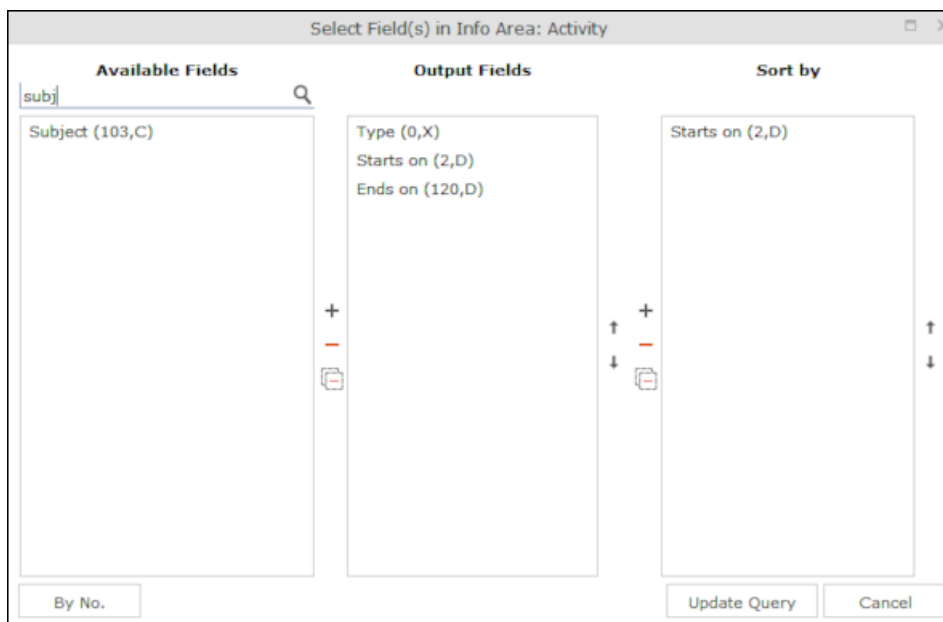
6. Select the fields from this info area that you want to display.

- **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 ↓ and ↑ buttons, to change the order of the fields.

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

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

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

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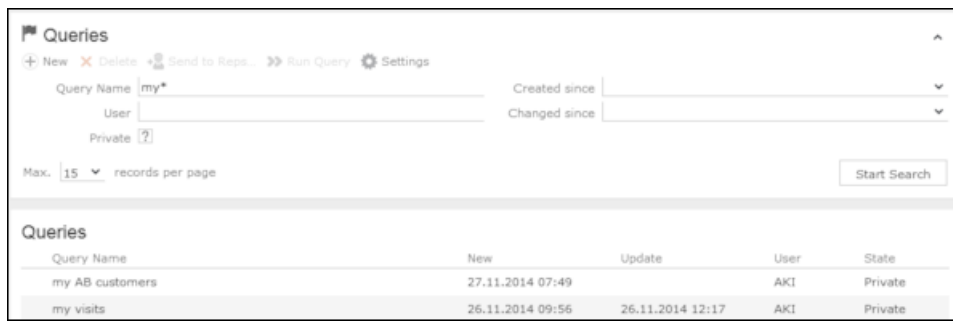
Select **Run** from the context menu to run a query directly from the list.

2. Enter search criteria to restrict the queries displayed.

3. Use the context menu or double-click on a query to open it. The query is loaded.

4. Edit the query by adding or removing info areas and conditions.

5. Define the maximum number of rows displayed by the query.

6. Click **Run Query** to run the query.

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

7. Click on **Save as Query Snapshot** to save the results list. Define the maximum number of rows to be saved and whether the result should be saved as public or private.

8. Click ▨ (**Export (MS Excel)**) to export your query to an Excel file, 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.

- Click on ➤ (**Run Query in Background**). You can continue working with the application and the query is scheduled for execution in the background. You receive a message when the query has executed, see Background Queries on page 125.

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

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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.

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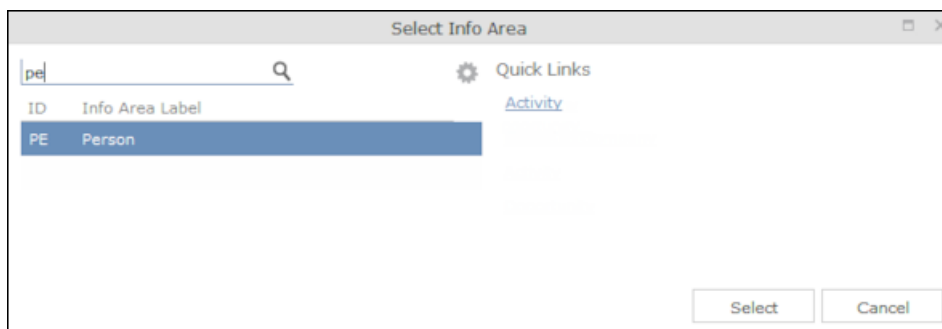
3. Select the info area from the list. The **Relationship Type** dialog box opens.

---
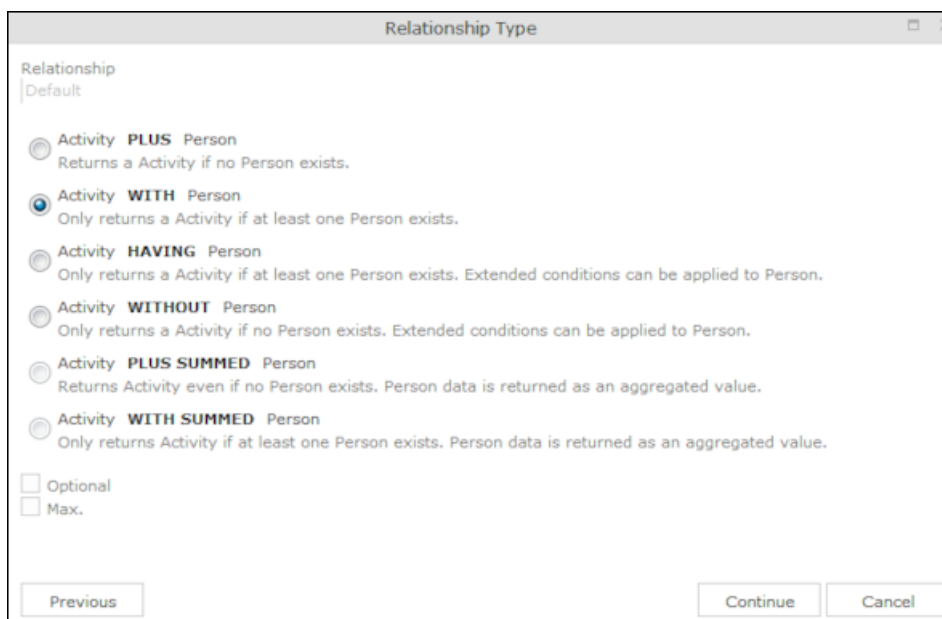
4. Select the desired relationship type. The following relation types are available for activities and persons:

   - **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.

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

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

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

7. Click **Continue**. The **Select Fields** dialog box opens.
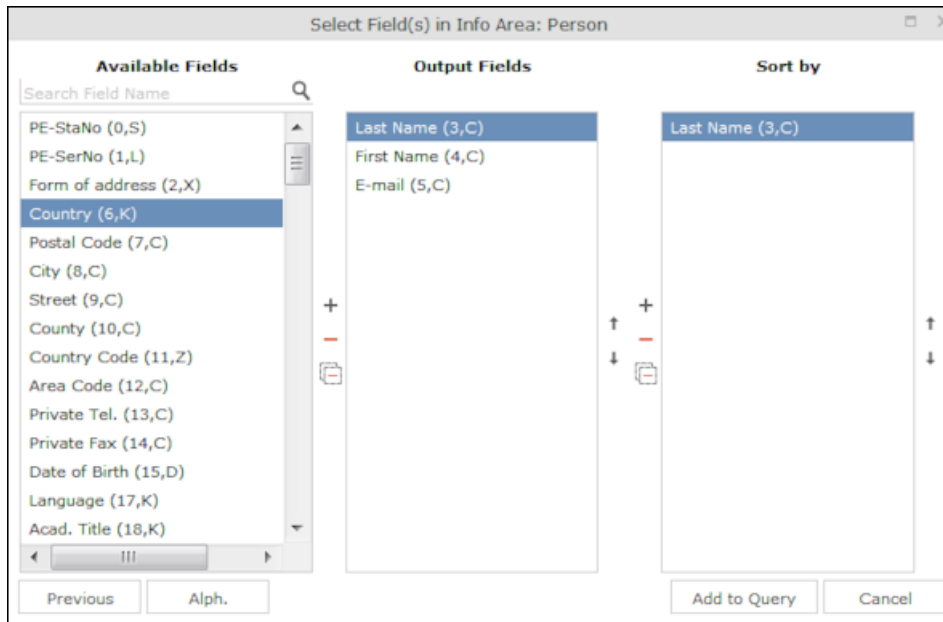
8. Define the output and sort fields, see Selecting the Fields in the List.

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.

Selecting Links between Info Areas

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

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

Example:

A query is defined for the **Ticket** info area. The **Person** info area is added to the query. Four links are available for selection between the **Ticket** and **Person** info area.
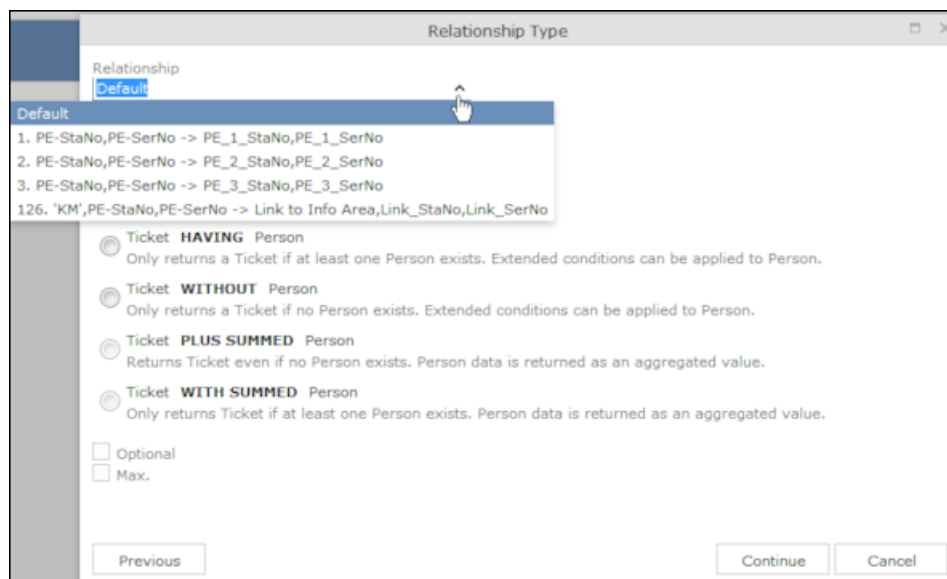
The area surrounded by the frame in the screenshot above lists the relationships between the **Ticket** and **Person** info areas.

The link type is displayed in the query as follows:
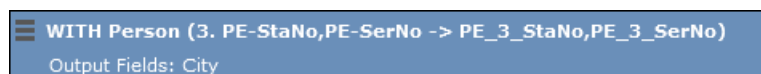
Conditions

You can define conditions for the fields in a selected info area.

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

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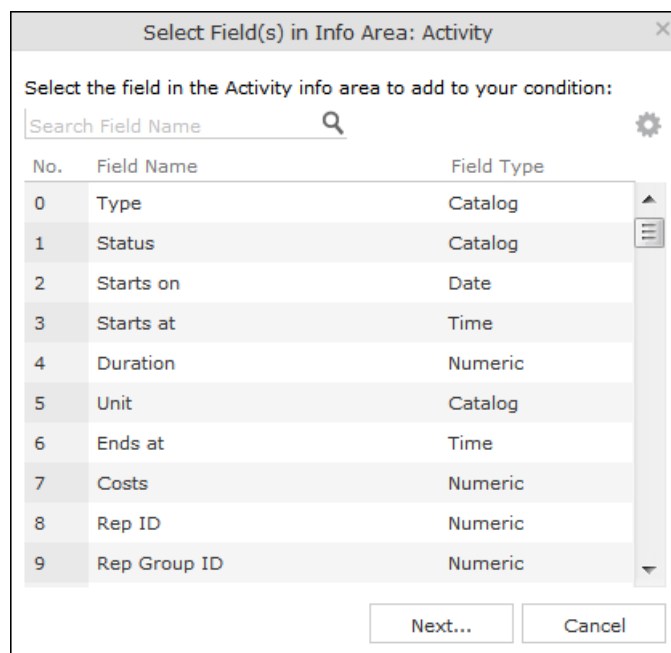
The fields that you can access based on your Aurea CRM access rights are displayed. Your administrator is responsible for defining your access rights.

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

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

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

   • Enter one or two letters to list all the fields that begin with those letters.

   • Enter more than two letters to list all fields that contain the sub-string in their name.

5. Define your condition. Depending on the **Field Type**, you can define the following conditions:

   • Text field; see Conditions for Numeric, Alphanumeric and Time Fields.

   • Date field; see Conditions for Date Fields and Variable Conditions.

   • Catalog field; see Conditions for Catalogs and Conditions for Child Catalogs.

   • Numeric field; see Conditions for Numeric, Alphanumeric and Time Fields

   • Logical (Boolean) field; see Conditions for Boolean Fields.

   • Time field; see Conditions for Numeric, Alphanumeric and Time Fields.

   • Rep field; see Conditions for Rep Fields and Variable Conditions.

6. Click on **OK**. This condition displayed in the overview.

Conditions for Catalogs

To define a condition for a catalog:

1. Select a catalog field. A dialog box is opened, allowing you to define the condition for the field.

The available catalog values are listed to the left. **Use as Parameter** is at the top of the list. You can use this value if the comparison value should be entered whenever the query is run, see Parameters and Predefined Queries on page 123.

2. Choose the appropriate operator, e.g. = **(equal)** to determine that the condition should return records where the value of the catalog field matches the comparison value.

3. Select **Fixed** to compare the contents of the field with a fixed value from the list of entries. Select **Field** to compare the contents of a field, see Comparing Field Contents. The **Text** option is also available for variable catalogs, see Conditions for Variable Catalogs.

4. Double-click on an entry under **Available fields** to use it as a comparison value. The entry is moved to the right under **Selected Fields**.

5. Double-click on an item in the right area to remove it.

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

Conditions for Variable Catalogs

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

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

2. Click on **Text**.

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

    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:

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.

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.
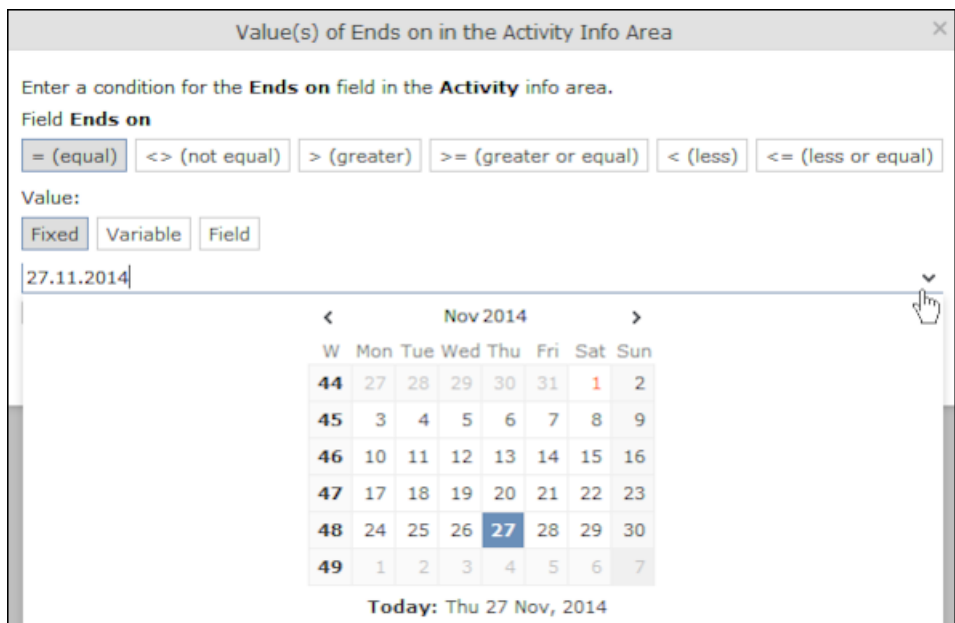
2. Select the type of comparison (**equal**, **not equal** etc.).

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.

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.
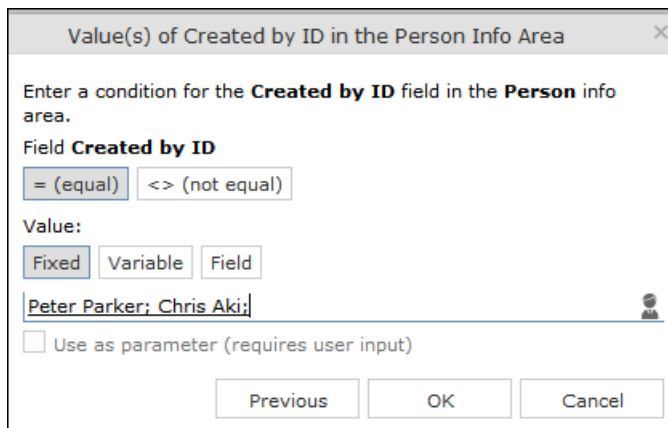
2. Specify the type of comparison (**equal**, **not equal**).

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.

Elke Führer; Gudrun Peischer; Miranda Meyer

Variable Conditions

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

Variable Reps

To define a variable condition applied to rep field:

1. Select a rep field and enable the **Variable** option.
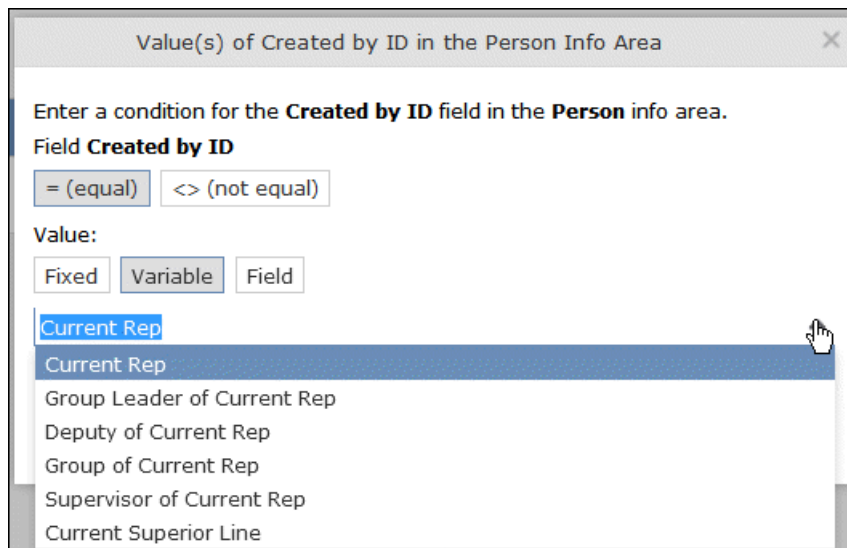
2. Select an option from the drop-down list. The appropriate user is used by the query as a comparison value when it is executed.

Variable Date Fields

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

To define a variable condition for a date field:

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

2. Select the reference date from the drop-down list.

3. Determine time period added (**Plus**) or subtracted (**Minus**) from the reference date.
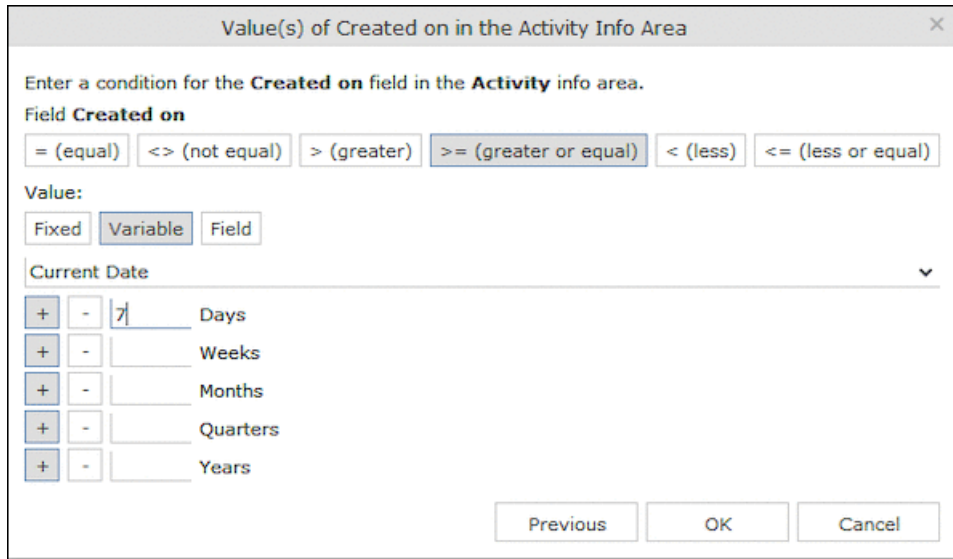
Variable Time Fields

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

To define a variable condition for a time field:

1. Select a time field and choose the desired comparison type.

2. Select the desired time format from the drop-down list.
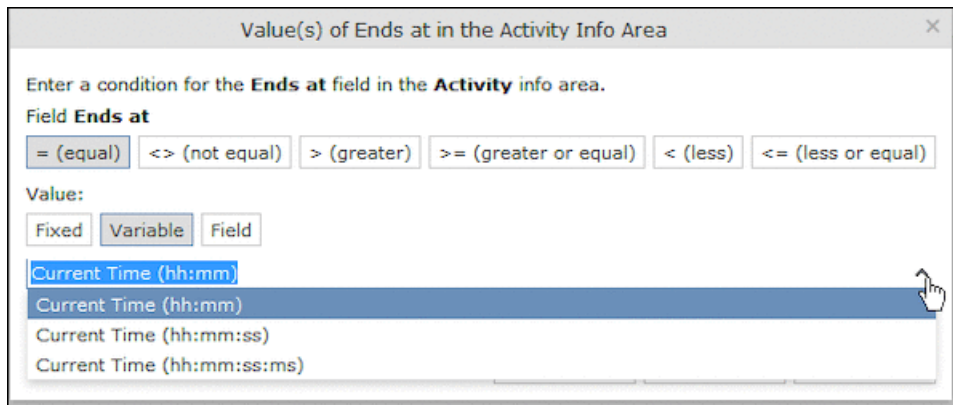
Comparing Field Contents

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

You can compare the following fields:

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

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

1. Define a condition.

2. Select the **Field** option.
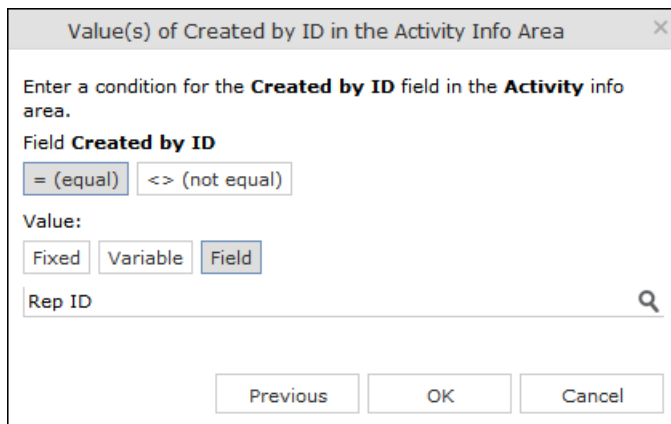
3. Click on 🔍 (**Select**). All fields of the same type in the info area are listed.

4. Select the desired field for the comparison.

Conditions in the Overview

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

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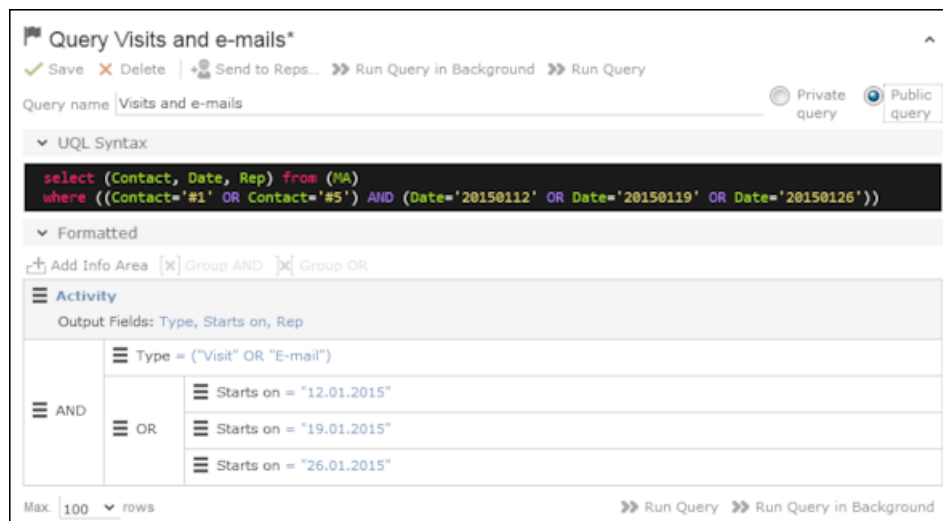
Linking Conditions

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

• Select **Change to AND** or **Change to OR** from the context menu next to the operator.

• Select the condition whose link operator you want to change and click on ⊠ (**Group AND**) or ⊠ (**Group OR**). Only the currently inactive option is available for selection.

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

You can also define conditions hierarchically and thus link multiple conditions. In the following example, the individual tiers of the hierarchy are indented:
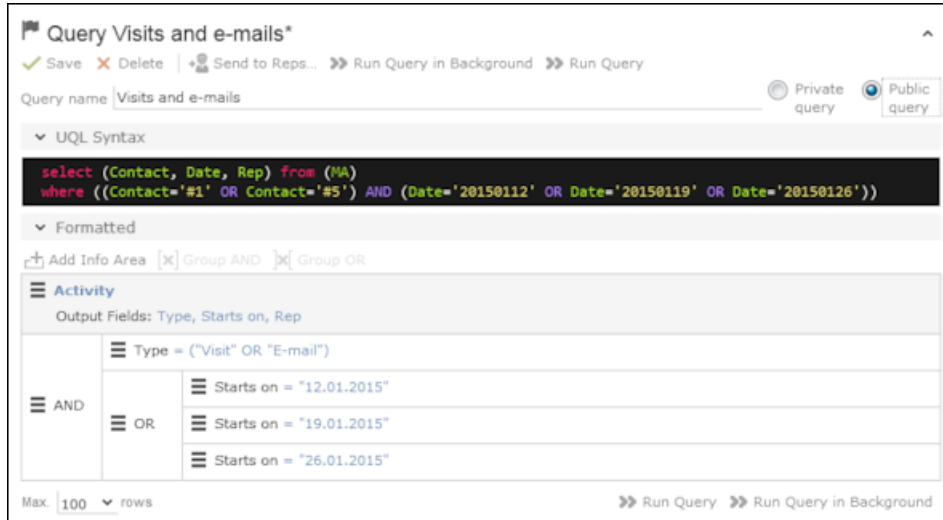
Each condition is evaluated separately and then combined when the other linked conditions using the appropriate operator (AND/OR).

Examples of Linked Conditions

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

Comparing the contents of one or more fields with a value

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

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

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

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

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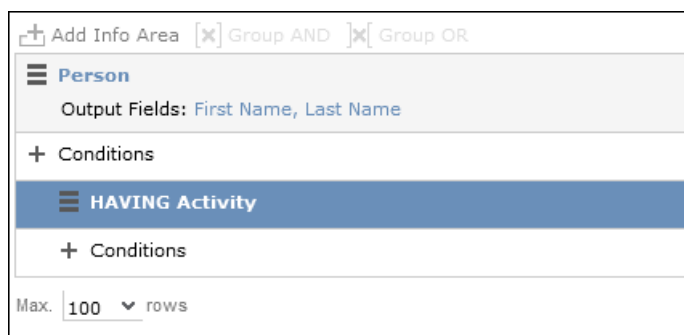
2. Select **Add Advanced Condition** from the context menu.

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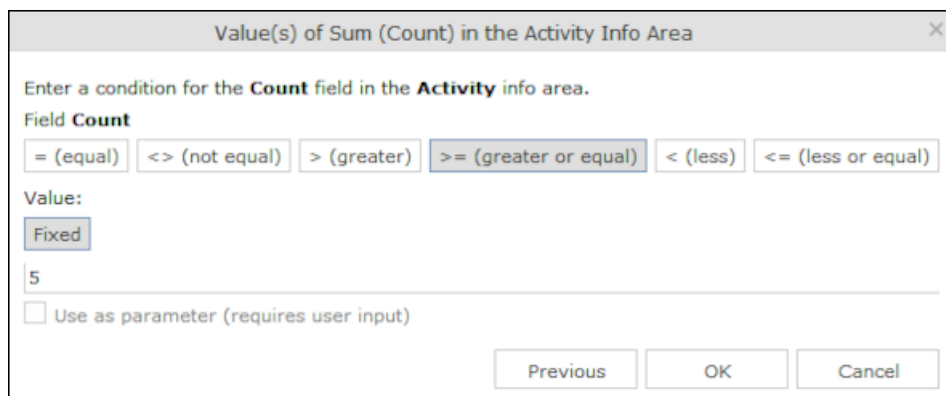
   The condition defined in the screenshot above determines that only persons for whom five or more activities are stored in the database are returned by the query.

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.
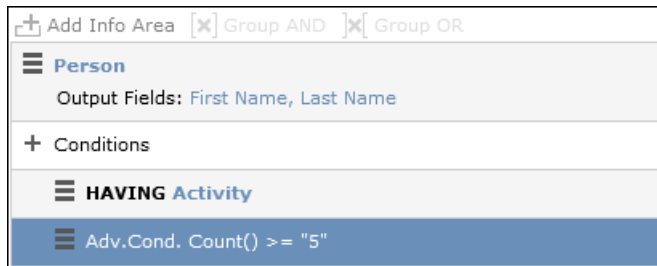
Parameters and Predefined Queries

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.
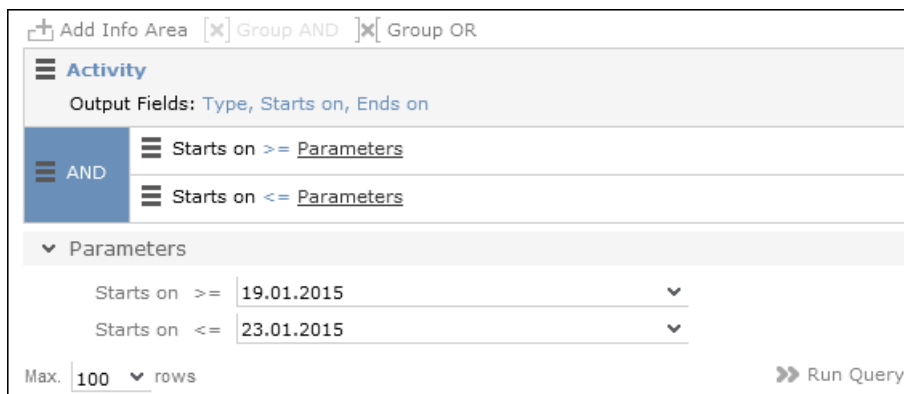
2. The conditions defined using parameters are listed under **Parameters**. Enter the desired comparison values for the parameters, or select the value from the drop-down list. One field is available for each condition defined using a parameter.

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.

3. Click on 👤 (**Select Rep**) to select the desired reps or groups in the **Recipient(s)** field, see Rep Fields.

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

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

5. Enable **Notify Rep(s)** to determine that the recipients should receive a message informing that they have received the query.

6. Enable the **Overwrite existing query definition** option to overwrite any queries with the same name owned by the recipients.

7. Click **Send Query**.

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

Saving, Loading and Exporting Query Results

Learn to save, load and export query result.

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

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

Background Queries

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

Queries may take some time to execute, depending on the volume of data that needs to be searched. Note that executing complex queries may impact negatively on the performance of the server.

Your administrator can determine that queries are always executed in the background at a specific time (e.g. at night). The results are then available the next day.

A To-Do record is created for each background query with the type set to "Calculation". The server is either executed by the server immediately or at a point in time set by your administrator using the rep's access rights. The rep is sent a message once the query has finished executing.

To display To-Dos for background queries:

1. Select **Queries & Analyses > Background Queries** from the menu

   The To-Dos stored for background queries are listed. Queries that have already been executed are indicated by a tick (✓) in the **Status** column.

2. Click in the **Link** column to display the results of the query.

1-N links handled on data access layer

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

UQL:

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

SQL

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

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


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

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

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

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

Quick Query (Enterprise CRM)

Quick Query is an enterprise querying tool that provides easy access to Aurea CRM data and information without requiring a deep technical knowledge of the querying tools.

Quick Queries is designed to improve your productivity whether you are a sales, marketing, management, or a service personnel.

Quick Queries are designed to:

• Simplify query composition

• Help you easily complete all relevant steps required to create effective queries, by providing guided process flows.

• Provide the convenience of easy access to key information, required to perform day to day activities, and render decisions.

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

- As a marketing specialist responsible for planning and conducting campaigns, you could query for select target groups, for a complete campaign execution.

- As a sales personnel, you could query for potential candidates satisfying several different criteria, to make a sales call.

- As a manager, you want to create queries and analysis to supervise the performance of your sales representatives.

Understanding Quick Queries

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

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

1. Composing a query

2. Enhancing the query

3. Query Execution

4. Finalizing the Query

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

The following screenshot shows the New Quick Query window, displaying the **Compose** tab of a quick query definition.
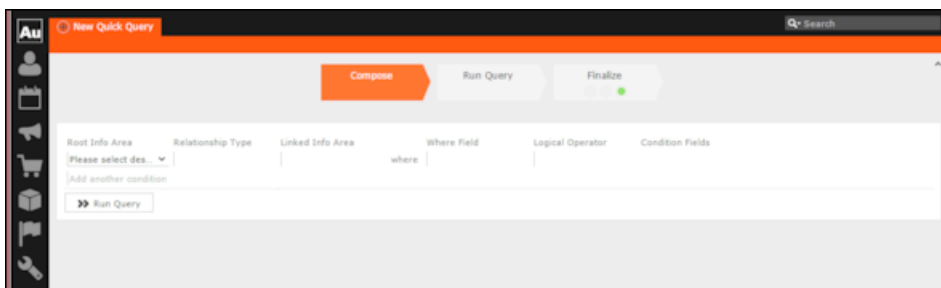
Note: The **Compose** tab allows you to implement the Compose and Enhance stages of a quick query definition.

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

- A quick query can be composed with the base info areas of Company (FI), Person (PE), and Contact Person (CP). Hence a Quick Query always returns a list of customers. It is mandatory to select one of the info areas.

- You are allowed the relationship type of "With" or "Without" when selecting a related or linked info area.

- Allows enhancement of the standard query with addition or subtraction of other queries (Quick Queries as well as standard queries.

- Allows you to execute the query immediately to test the query.

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

- All queries that refer to the root info areas Company (FI), Person (PE), and Contact Person (CP) are available for enhancement.

- Queries defined by you and public queries are made available.

- You can delete expendable conditions.

- You can execute the enhanced query to test the results.

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

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

Creating a Quick Query

To create a quick query, perform the following steps:

1. From the **Queries and Analysis** menu select **Queries**. The Queries window displays.
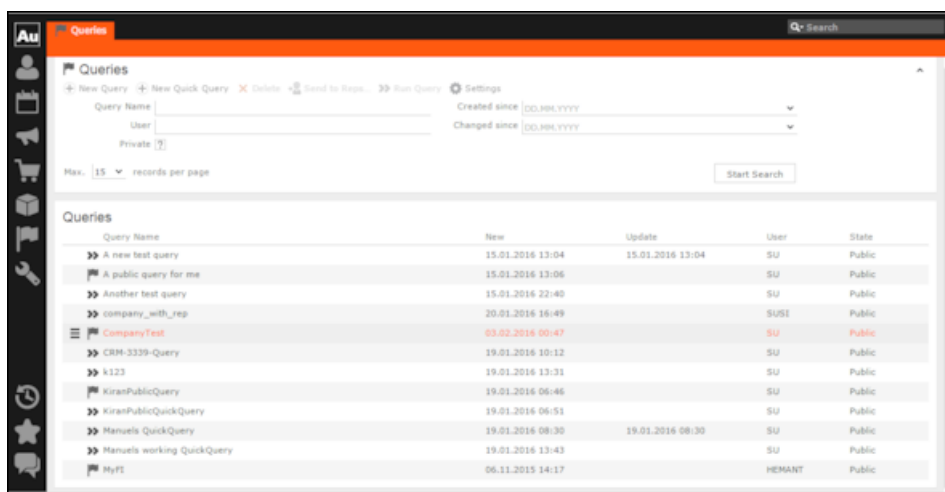
Note: The list of queries displayed contains both Quick Queries and standard queries. The Quick Queries in the Queries list are tagged with the » icon.

---

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

3. Select the **Root Info Area** of the query you want to create from the drop down list. You have the following choices: Company; Person, Contact Person. The **Relationship Type** column is activated.
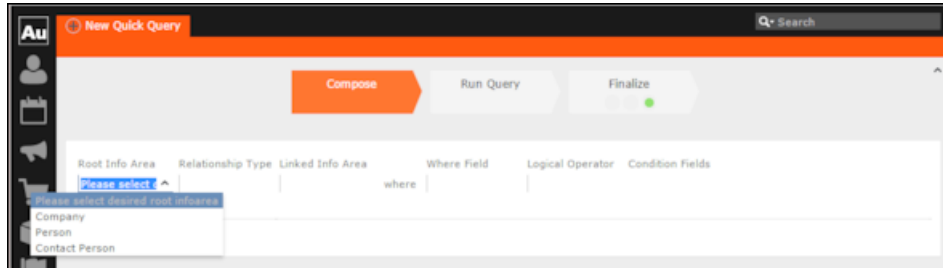
4. Select the **Relationship Type** from the drop down list for the linked info area.

   The Where Field activates and is populated with applicable fields for the linked info area. In the screenshot example, the root info area is company, and the relationship type **With** for the **Linked Info Area** Opportunities.
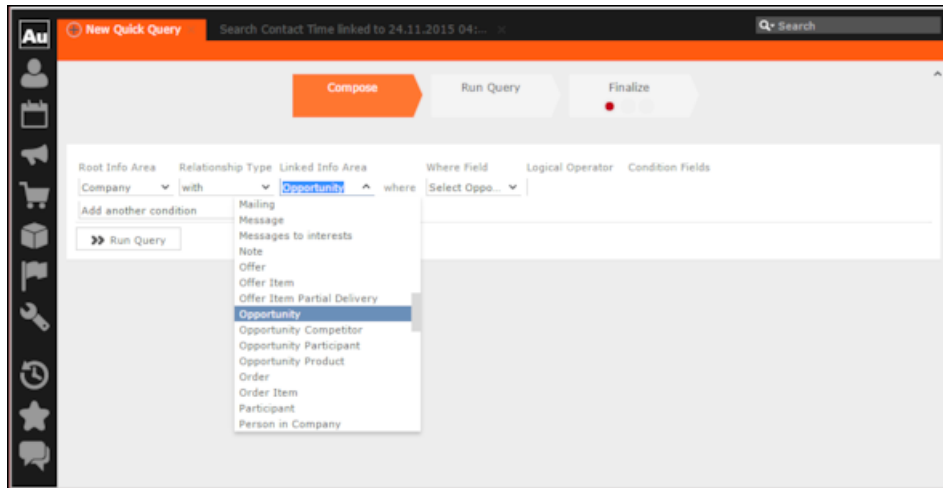
Note: It is not necessary to add a Relationship Type to another info area. You can directly create conditions on the root info area. In such case, you can directly select a **Where Field** and ignore the **Relationship Field** and **Linked Info Area** fields.

---

5. After that select the Linked Info area from the drop down list. The following screenshot shows the **Company** info area, and the relationship type **With** for the **Linked Info Area** Opportunities. The **Where Field** drop down list is populated with fields from the linked info area.
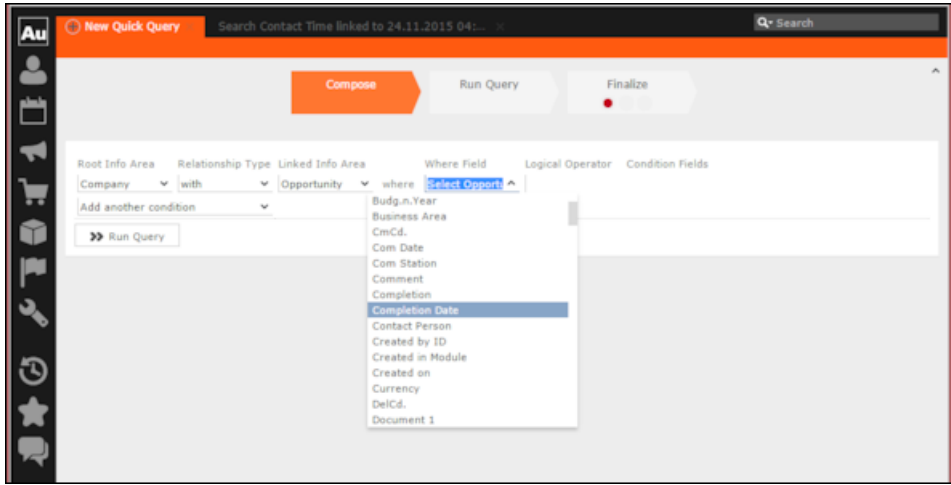
Note: The Where Field column gets activated and shows the fields from the linked info area, in this case the Company fields.

6. Scroll down and select the required info area field from the **Where Field** drop down list.

   The Logical Operator field column activates. In this example screenshot, **Completion Date** is selected.

7. Select the applicable **Logical Operator** from the drop down list. You have the following options: Equals (=); Not equals; Is empty; Is not empty; Is true; Is not true; Is smaller than; Is greater than; Is between; Is current date.

Note: The options populated in the **Logical Operator** depends on the data type of the **Where Field**. For example, a Boolean field type gets the operators: Is true; Is not true.

The Condition Fields column activates and the drop down list is populated with the available values. In this case it displays the available country names. In this example screenshot, the **Logical Operator** Is between is selected and in the **Condition Fields** the start and end dates between which the completion dates for opportunities are set is selected.
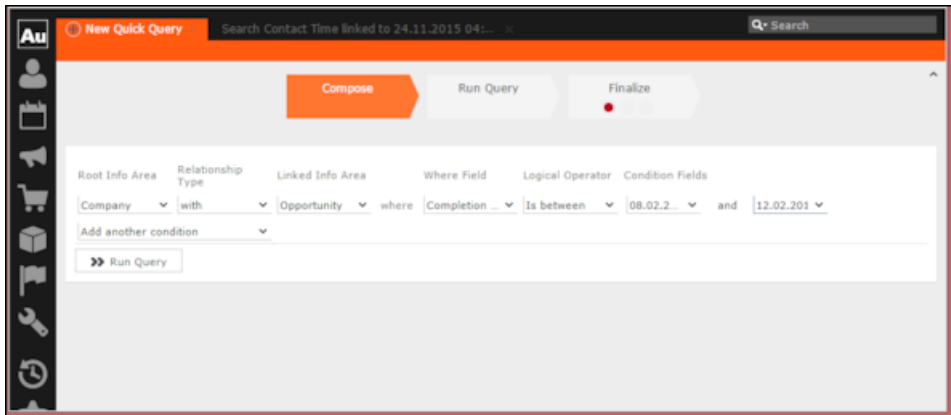
8. To Add Another Condition, select one of the following from the drop down list:

- Add records that meet the following conditions
- Add records from the following query
- Subtract records that meet the following conditions
- Subtract records from the following query
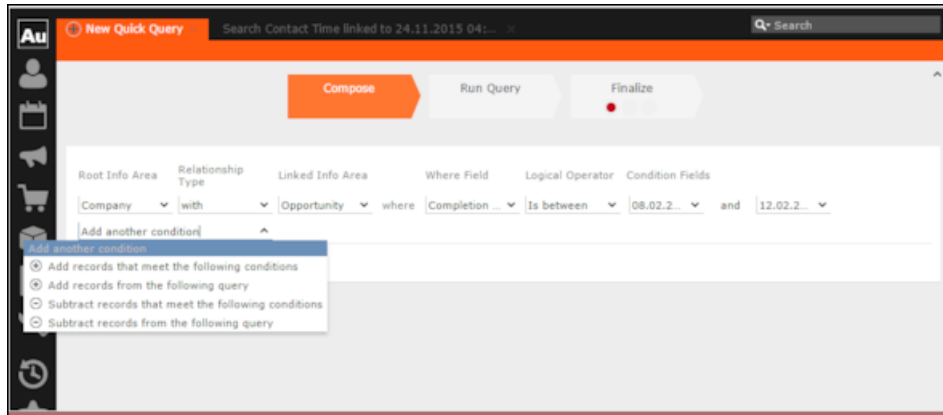
9. Click Run Query to test the results.
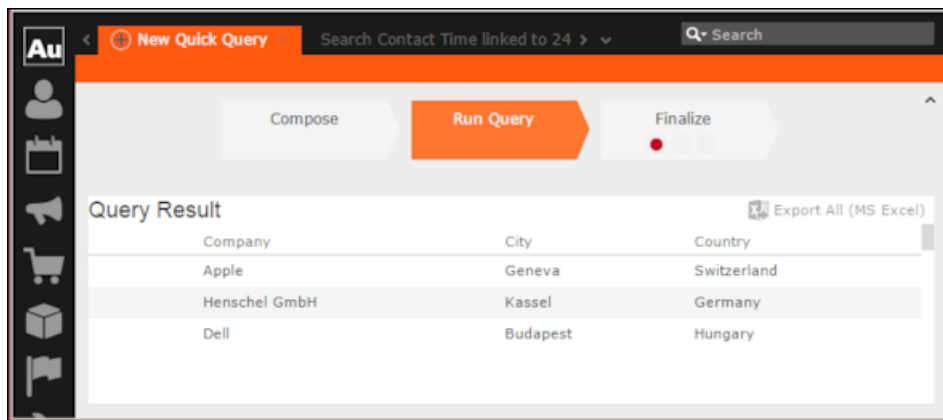
10. Depending on your choice, perform the following sub-steps.

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

---

a. For the options to **Add records that meet the following conditions** or **Subtract records that meet the following conditions**, repeat the instructions in steps 3 to 7 above. The example screenshot shows the **Add records that meet the following conditions**. Companies with Opportunities and Where the Project Manager is a specific person.
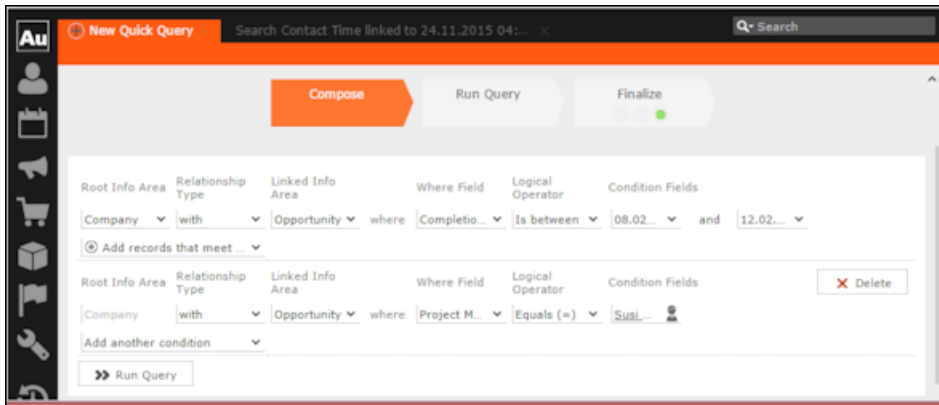
Note: The above screenshot shows the **Finalize** tab with a green dot. This demonstrates that you can move between different stages of a Quick Query independently. In this case, the Quick Query was finalized after adding the above records. Now we can move to the Enhance stage of a Quick Query definition, and use the remaining two options of adding or subtracting records from other queries.

b. Click Run Query to evaluate the results of your quick query.
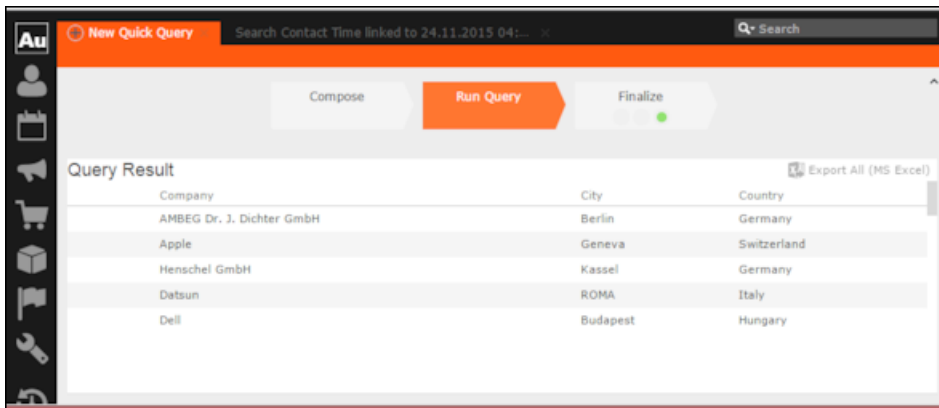
Note: In this run additional records are added to the run on the base query run in step 9 above.

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

a. Select **Subtract records from the following query**.

A search box is displayed. Start typing the name of the query and list of possible matches are displayed as you type, as shown in the screenshot below. For this example, we select the query **company_basic_revenue**. This query removes the records for companies that have a revenue of less than 100,000 from the base Quick Query.
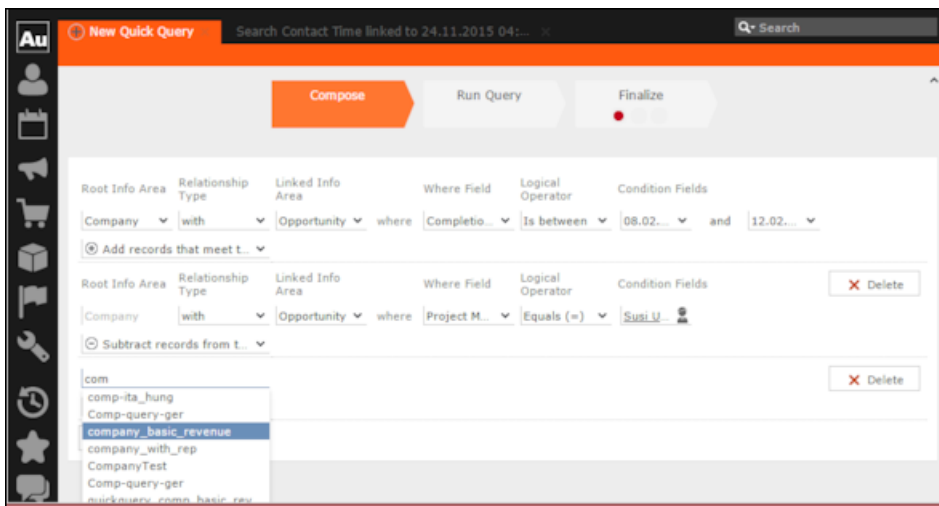
b. Click **Run Query** to view the results of the new enhancement.
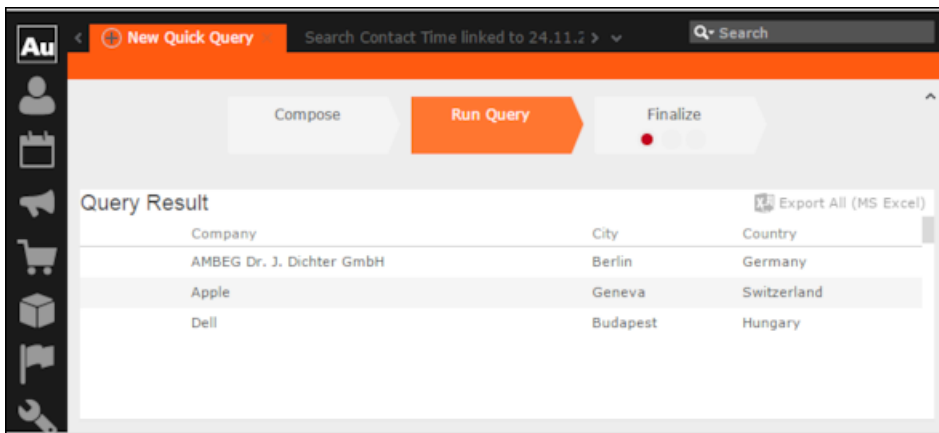
c. To **Add a record from the following query** type the name of the query in the search box.

11. To finalize a Quick Query, click the **Finalize** tab.

Note: You can finalize a quick query at any stage of the query definition.
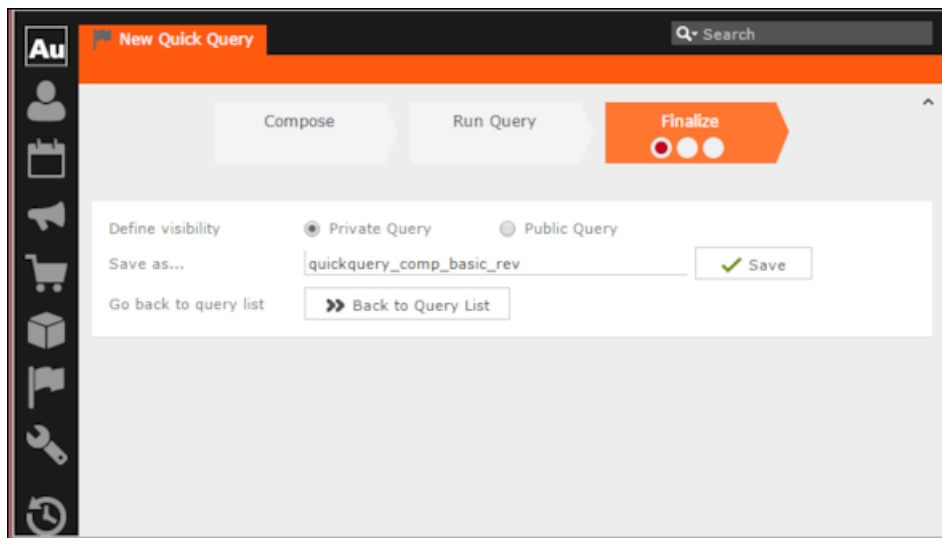
a. Check **Private Key** to save the Quick query for your personal use or check **Public Query** to share the Quick Query with others.

b. Enter a name for the Quick Query in the **Save as...** text field.

c. Click **Save** to finalize the Quick Query.

Note: Click Back to Query List to show a list of queries with the finalized quick query highlighted.

Change Notifications Service (Enterprise CRM)

Aurea CRM change notification service notifies you about changes to records and events of interest to you.

You can track the changes on your dashboard, as well as use other notification types like Email, Popup, and Record. You can add items of interest to your personal Watchlist.

To enable change notifications service on an infoarea, request your CRM system administrator to add the watchlist menu to the infoarea's context menu.

Note: Change Notification Service is an enterprise feature.

Overview of Watchlists and Notifications

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

For example, an accounts manager might be interested in knowing when a change occurs with his key accounts and he can add the accounts to his watchlist and set the notification types.

The following screenshot shows the list of watchlist items subscribed by all users:
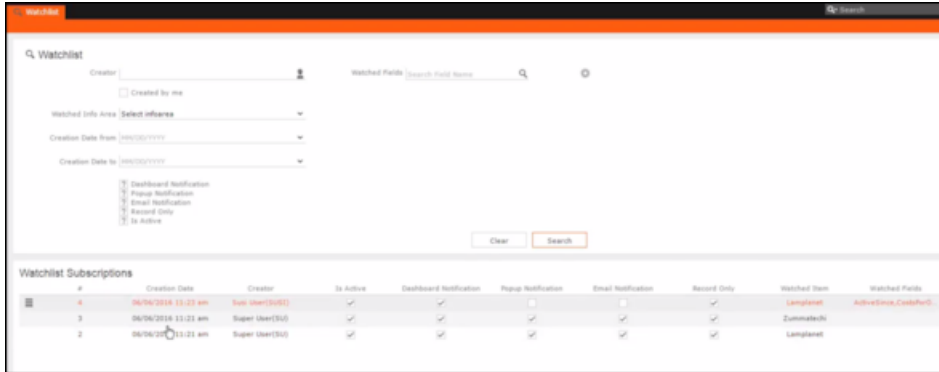
For a given record or infoarea the Watchlist context menu initially allows you to add a Watchlist item. For example, the screenshot below shows the **Add Item to Watchlist** and **View all Watchers** sub-menu items for the Company infoarea.
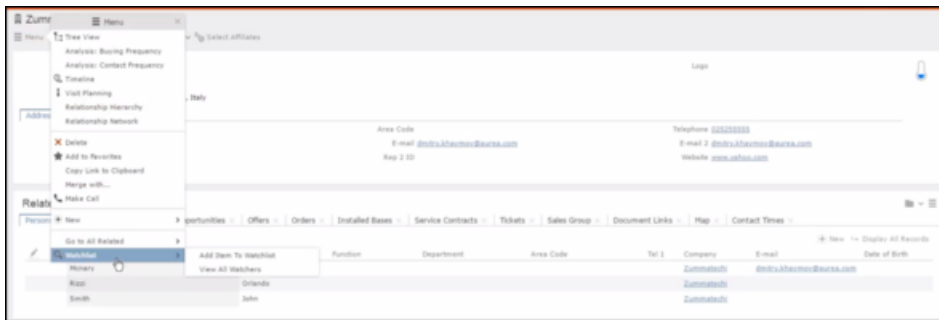
After adding an item to the Watchlist the Watchlist context menu allows you to perform the following tasks:

• Delete items from the watchlist.

• View all watchers.

• Deactivate watchlist items.

• View change notifications.

• Edit watchlist item.

• See the screenshot below:
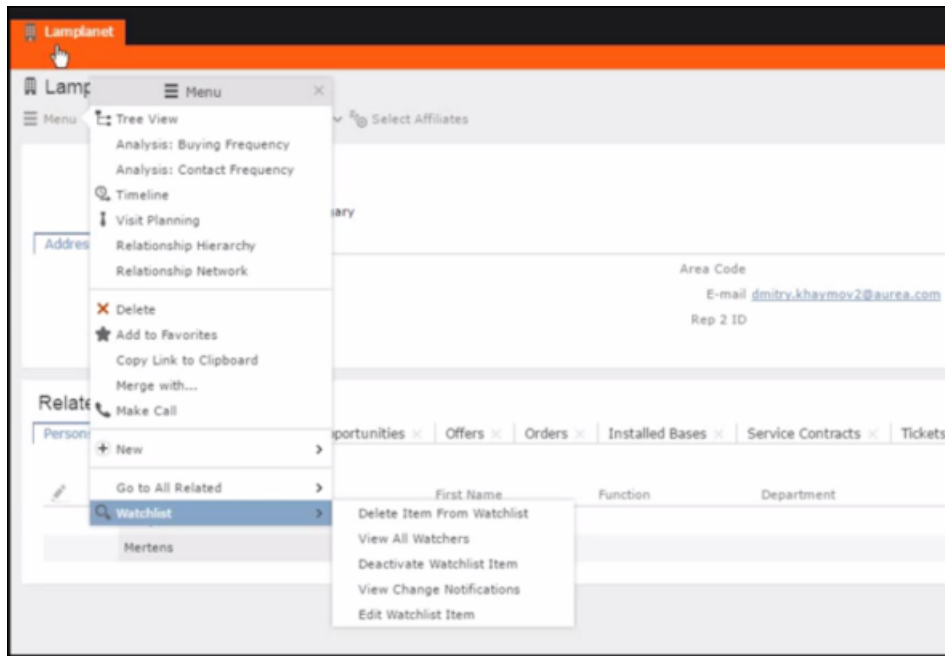
A notification is generated when one of the following condition is fulfilled:

- A notification request is set for any change to the record of interest and a change is made to the record.

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

- The following screenshot shows the change notifications visible on the Dashboard:
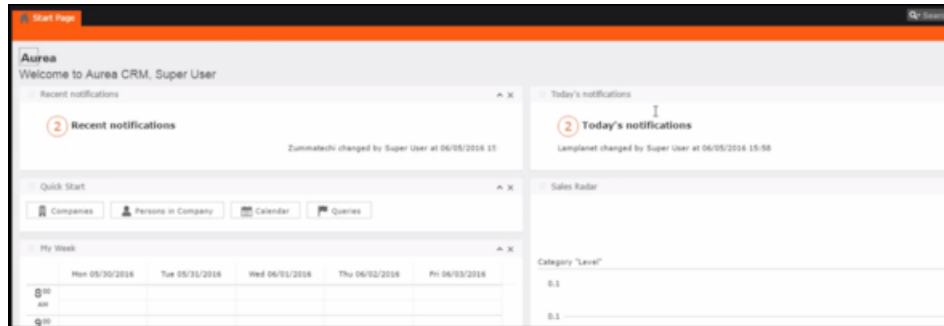
- The following screenshot shows a popup change notification:
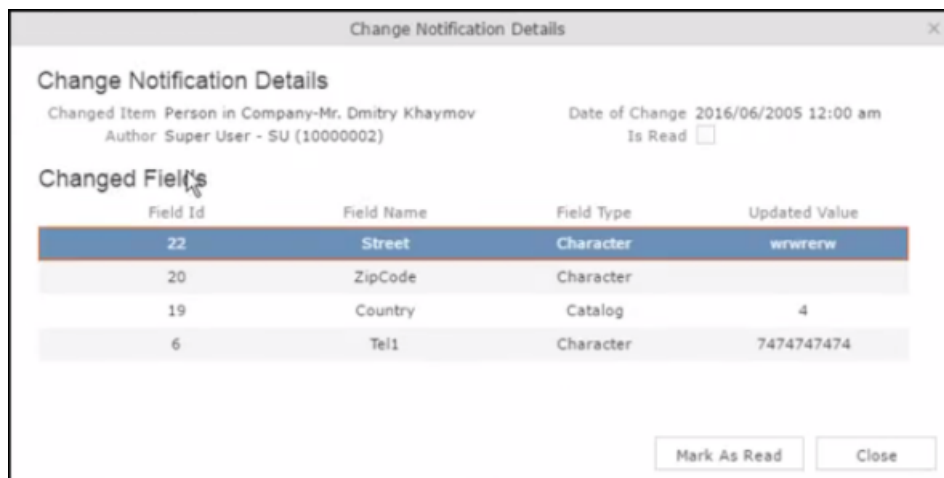
- The remaining sections describe the various tasks required to create and work with Watchlist items.

Adding items to the Watchlist

Learn to add items to watchlist.

To add items to a watch list perform the following steps:

1. Open the infoarea and search for the record that you are interested in adding to the watchlist.

    The record window displays. For example, the following screenshot shows the **Lamplanet** Company record infoarea.
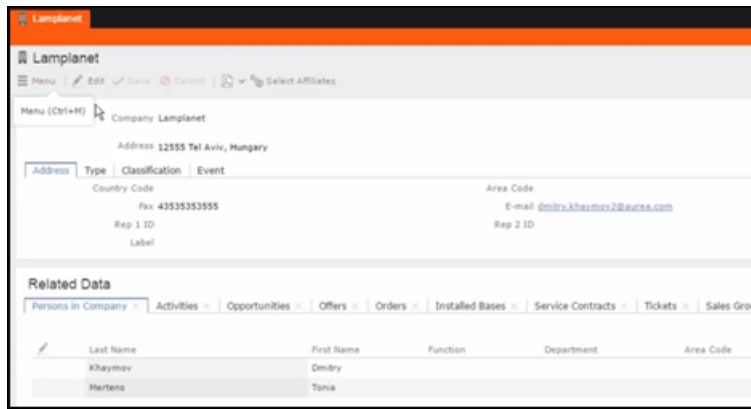
2. From the context menu items, select **Menu** > **Watchlist** > **Add Items to Watchlist**.
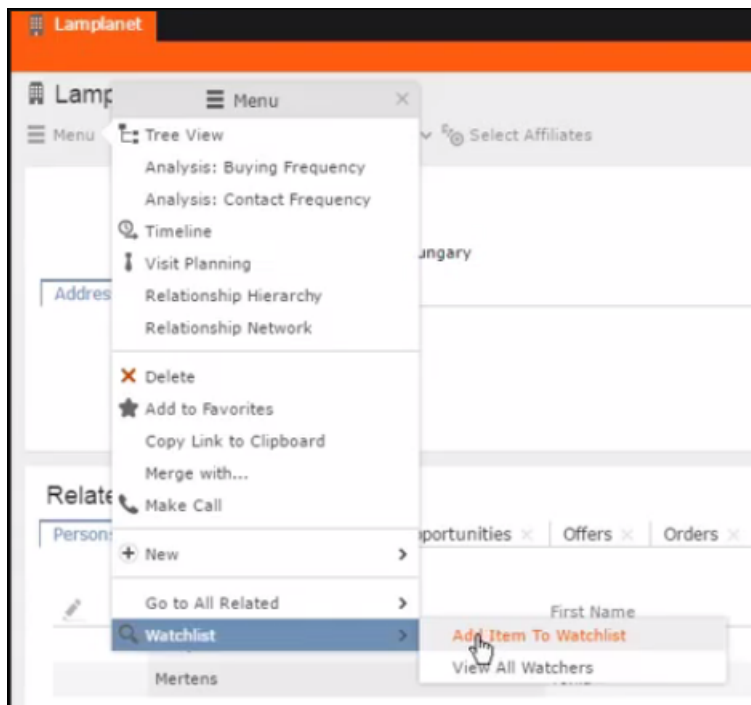
The **Add Item to Watchlist** window displays.
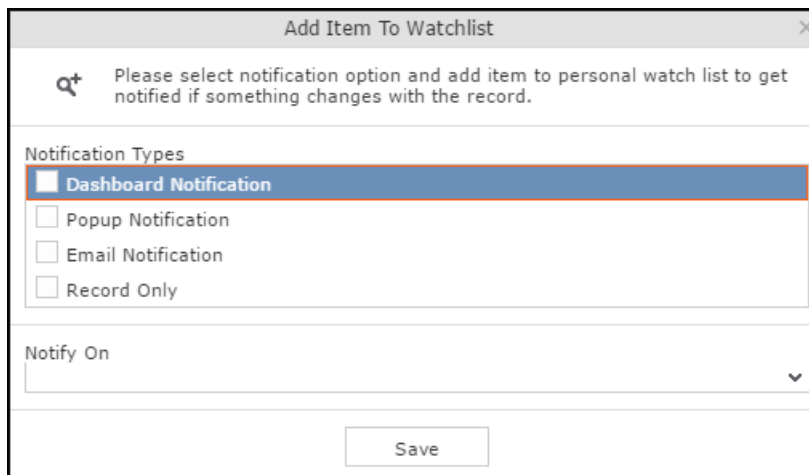
Note: You have to select at least one **Notification Type** and also specify a **Notify On** event to successfully add a watchlist item.

---

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.
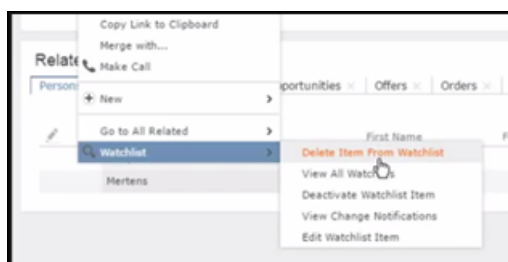
Editing Watchlist Item

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**.
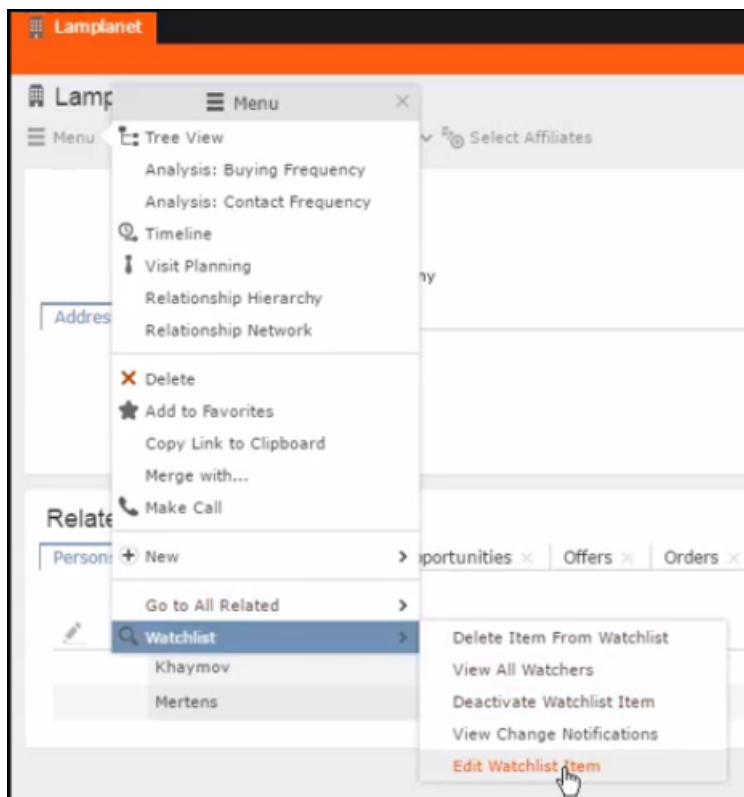
The **Edit Watchlist Item** window displays.
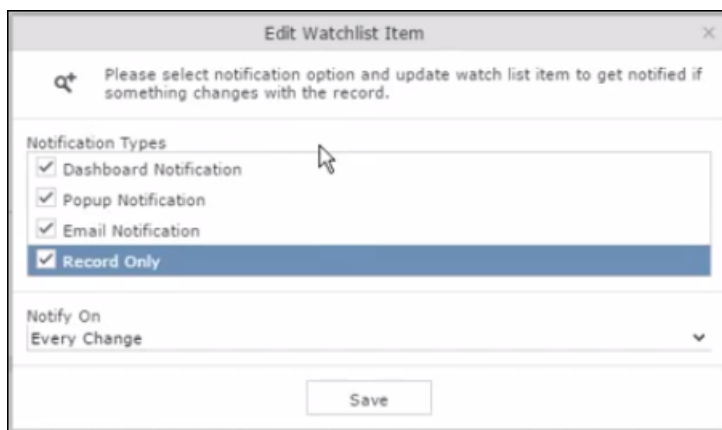
3. Select or Deselect the **Notification Types**.

> **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.

2. Select **Menu** > **Watchlist** > **Delete Item from Watchlist**. A confirmation window displays.
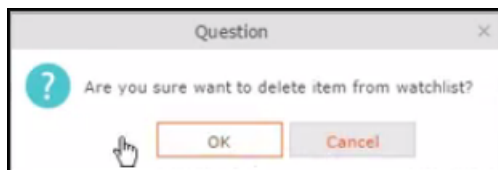
3. Click OK. The item is removed from the watch list.

View all Watchers of a Watchlist item

Navigate to view all watchers of a Watchlist item.

To view all watchers subscribed to a watchlist item:

1. Open the record to which containing the watchlist item.

2. Select **Menu** > **Watchlist** > **View all Watchers**.

   The **View Watchers** window displays the list of subscribers to the watchlist item.

Activate/Deactivate watchlist subscription item

Learn to stop / start watchlist subscription item.

To stop a watchlist item from generating change notifications, you can deactivate the watchlist item. Similarly, you can activate the watchlist item when you want to receive change notifications.

You can activate or deactivate a watchlist item from two locations. You can search for watchlist item from the Watchlist subscriptions search page and deactivate or activate it from there.

On the other hand if you know the record for which watchlist item was created, then you can deactivate it from the record's watchlist context menu.

Activate/Deactivate from watchlist subscription search page

To deactivate or activate watchlist item from the watchlist subscription search page, perform the following steps:

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

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

> **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.

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

4. To activate a watchlist item:

   a. Click the **Actions** context menu. The **Actions** menu displays.

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

Search watchlist subscriptions

Learn to search the watchlist subscriptions.

To search the watchlist subscriptions, perform the following steps:

1. Select **Collaboration** > **Watchlist** > **Watchlist Subscriptions**.

   The Watchlist Subscription Search page displays.
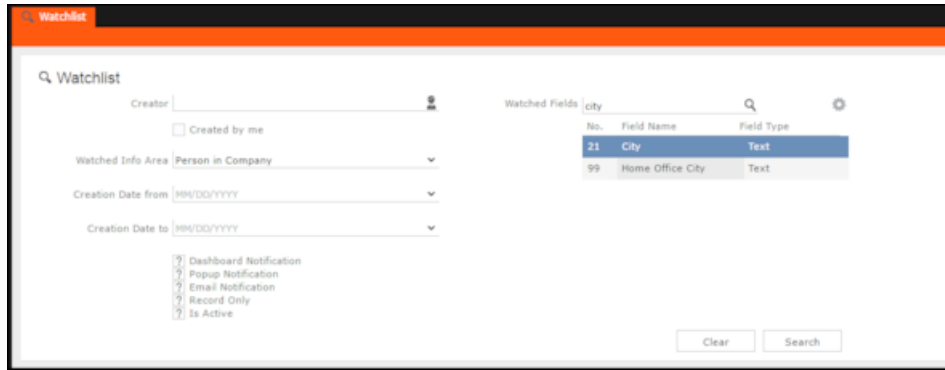
2. Select the search filters from the following list:

   • **Creator** —Filter watchlist subscriptions created by the specified subscriber.

     Only one person can be selected. If select the [✓ Created by me] filter, the search is restricted to watchlist items created by you.

   • **Watched Info Area**—Filter watchlist subscriptions on records from the selected infoarea. The **Selected Fields** filter is activated and populated with selected fields to be watched when the watch list was created.

   • **Selected Fields**—Specify the selected fields to be watched when the watch list was created.

   > **Note:** The fields populated in this filter depends on the infoarea selected in the **Watched Info Area** filter. In the example, in the screenshot in step 1, the **Watched Info Area** is **person in company**, and the corresponding fields for the infoarea is displayed.

   • **Date of Change from**—Select the start date from which you want to view the subscriptions created.

   • **Date of Change to**—Select the end date before which you want to view the subscriptions created.

3. Select the notification type and read status filters of the watchlist subscriptions.
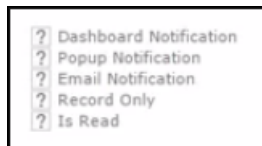
> **Note:** If multiple filters are selected, then search would select a notification type if it satisfies any one of the criteria.

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

- ⍰—In this state, the filter is ignored and not included in the search.

- ☐(Blank checkbox)—In this state, the filter is added as false. This means the notification is selected if the filter item value is false. For example, for the **Is Read** filter, this would mean that a notification is selected if it is marked as not read.

- ☑(selected checkbox)—In this state, the filter is added as true. This means the notification is selected if the filter item value is true. For example, for the **Is Read** filter, this would mean that a notification is selected if it is marked as read.

To select an item perform the following:

a. To activate a filter item, click ⍰.

The icon changes to a checkbox(☐).

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

4. Click Search.

The search result is displayed in the bottom pane.

| Watchlist Subscriptions | | | | | | | | | |
#	Creation Date	Creator	Is Active	Dashboard Notification	Popup Notification	Email Notification	Record Only	Watched Item	Watched Fields
11	06/16/2016 02:35 pm	Super User(SU)	✓	✓	✓	✓	✓	Zummatechi	
1	06/16/2016 02:17 pm	Super User(SU)	✓	✓	✓	✓	✓	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**.
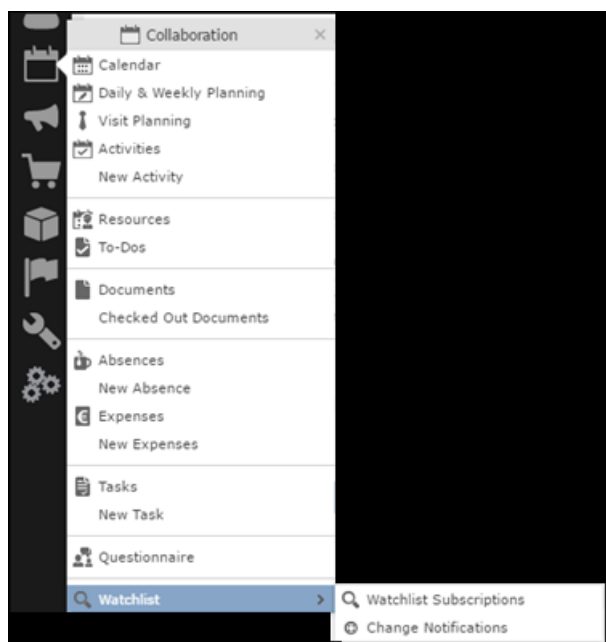
The Change Notification page displays.
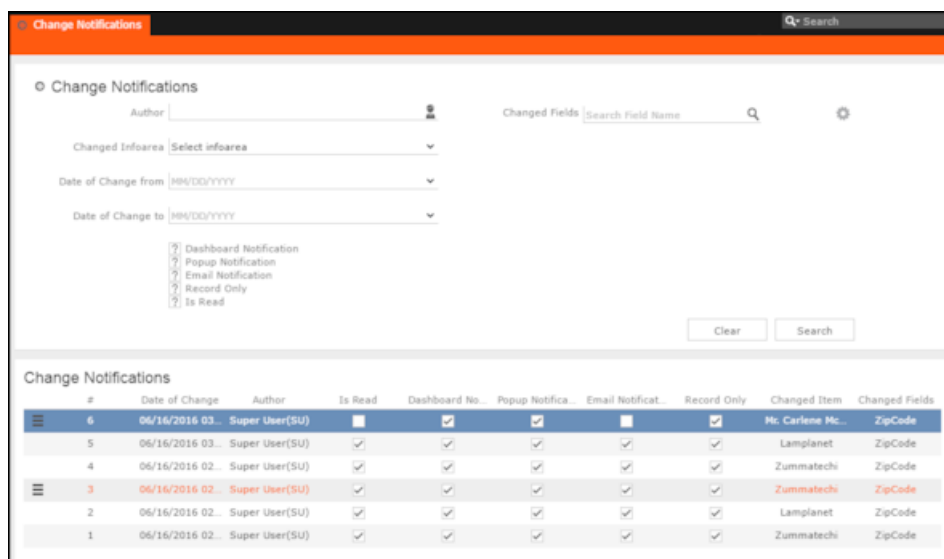
3. To search for specific notifications you can select the filters from the following list:

• **Author**—Filter notifications issued to the specified subscriber. Only one person can be selected.

• **Changed Infoarea**—Filter notifications issued to all subscribed records of the selected infoarea from the dropdown list.

• **Date of Change from**—Select the start date from which you want to view notifications issued.

- **Date of Change to**—Select the end date before which you want to view notifications issued.

- **Changed Fields**—Filter the notifications issued for changed to specific fields. You can select multiple fields from the listed fields.

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

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

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

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

- ?—In this state, the filter is ignored and not included in the search.

- ☐(Blank checkbox)—In this state, the filter is added as false. This means the notification is selected if the filter item value is false. For example, for the **Is Read** filter, this would mean that a notification is selected if it is marked as not read.

- ☑(selected checkbox)—In this state, the filter is added as true. This means the notification is selected if the filter item value is true. For example, for the **Is Read** filter, this would mean that a notification is selected if it is marked as read.

To select an item perform the following:

a. To activate a filter item, click ?.

The icon changes to a checkbox(☐).

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

5. Click Search. The search result is displayed.

6. For each item in the search list, you can perform the following tasks:

a. Marking the notification item as read.

To mark the item as read:

- Click the Action context menu, and select **Mark as Read**.

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

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**.

- The Change Notifications Details window displays.

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

Viewing Change Notifications for a Record

You can view the history of change notifications issued for a specific record or watchlist subscribed item.

Similarly you can view the change notifications for all watchlist item subscriptions. This topic describes how to view change notifications issued to all subscribers of a watchlist item.

To view change notifications for a record, perform the following steps:

1. Open the record to which you have added the watchlist item.

2. Select **Menu** > **Watchlist** > **View Change Notifications**.

   The search notification page displays.

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

---

3. To search for specific notifications you can select the filters from the following list:

   - **Author**—Filter the notifications issued to the specified subscriber. Only one person can be selected.

   - **Changed Infoarea**—Not editable. This is restricted to the record you selected.

   - **Date of Change from**—Select the start date from which you want to view notifications issued.

   - **Date of Change to**—Select the end date before which you want to view notifications issued.

   - **Changed Fields**—Filter the notifications issued for changed to specific fields. You can select multiple fields from the listed fields

   ---

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

   ---

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

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

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

- ?—In this state, the filter is ignored and not included in the search.

- ☐(Blank checkbox)—In this state, the filter is added as false. This means the notification is selected if the filter item value is false. For example, for the **Is Read** filter, this would mean that a notification is selected if it is marked as not read.

- ☑(selected checkbox)—In this state, the filter is added as true. This means the notification is selected if the filter item value is true. For example, for the **Is Read** filter, this would mean that a notification is selected if it is marked as read.

To select an item perform the following:

a. To activate a filter item, click ?.

The icon changes to a checkbox(☐).

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

5. Click Search. The search result is displayed.

6. For each item in the search list, you can perform the following tasks:

a. Marking the notification item as read.

To mark the item as read:

- Click the Action context menu, and select **Mark as Read**.

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

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**.

- The Change Notifications Details window displays.

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

Marking Change Notification as Read

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

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

To mark a change notification from the dashboard, double the notification and the **Change Notification Details window** displays. In this window click **Mark as Read** to mark the notification.
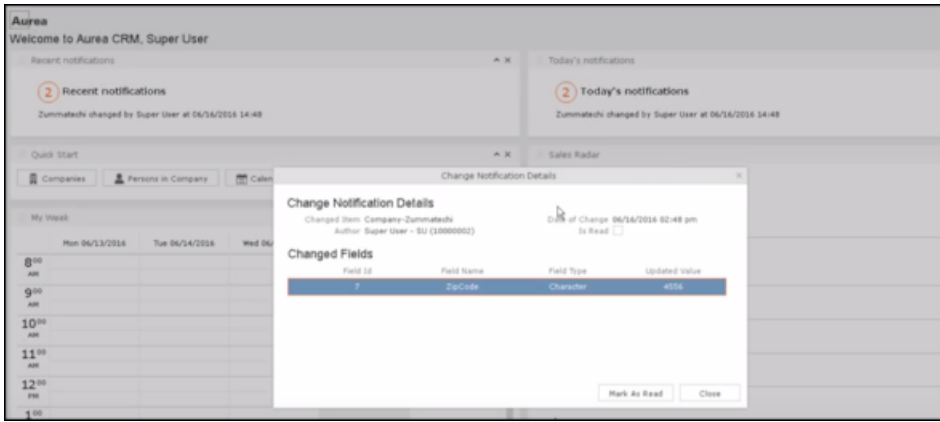
You can also mark a change notification from the change notification search page. To do this:

1. Select **Collaboration** > **Watchlist** > **Change Notifications.**

   The Change notification search page displays.

2. Enter the required search filters and click Search.

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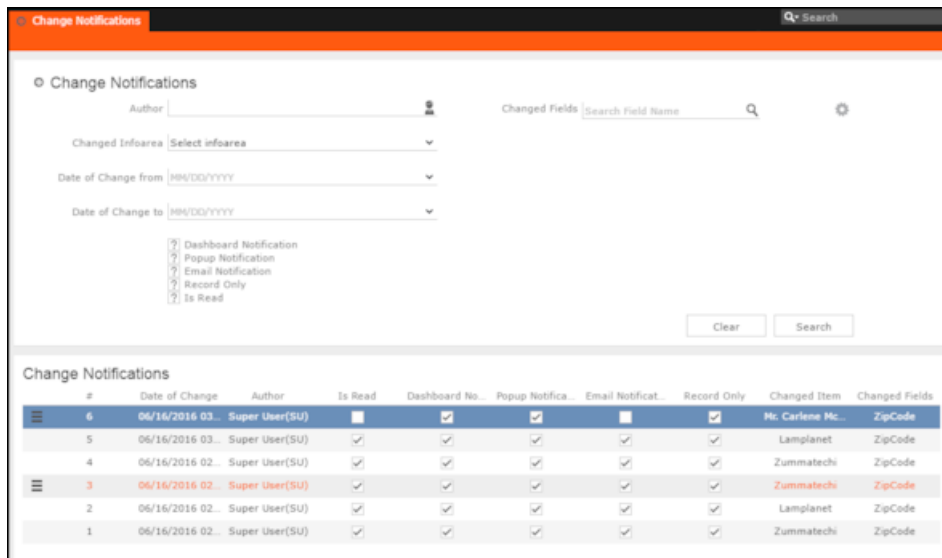
3. For the required change notification, you can mark it as read in one of the following ways:

   a. Marking the notification item as read.

      To mark the item as read:

      • Click the Action context menu, and select **Mark as Read**.

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

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

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

- The Change Notifications Details window displays.

- Click **Mark as Read**.

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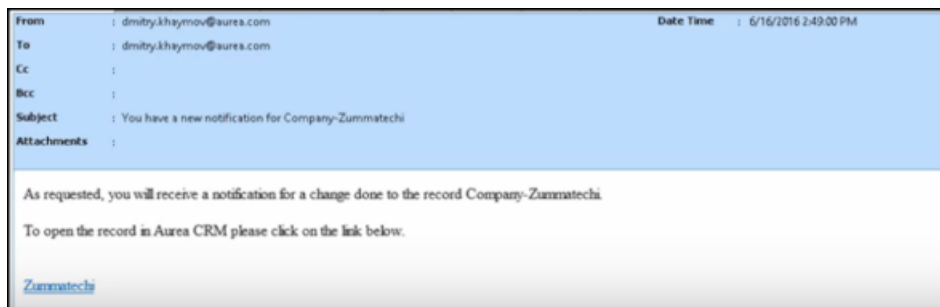
Change Notifications on the Dashboard

The dashboard can display two types of change notifications.

The dashboard can display two types of change notifications, recent change notifications and today's change notifications. See the screenshot below.
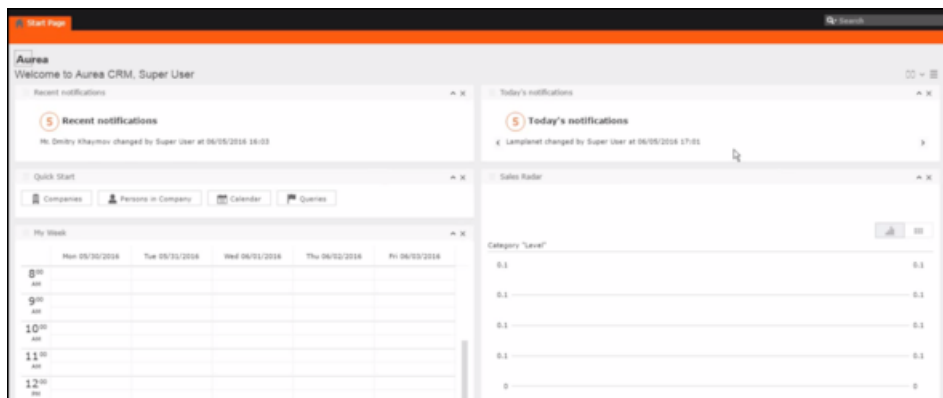
Note: What you see on the dashboard is mostly configured by your CRM administrator. If you do not see the above, please contact your CRM administrator to enable the notifications.

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

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

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

Analyses

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

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 ![icon] (**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 ![icon] (**Queries & Analyses**) **> Analyses**). Select **Run** from the context menu.

   The results of the quick analysis are displayed to the right of the mask.

5. Click on **Export** (🖼️) 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.

3. If fields have been defined as filters in the analysis, you can define filter criteria in order to restrict the results of the analysis.

Filter		
Type	Visit	⌄
Status	Completed	⌄
Starts on from		⌄
Starts on to		⌄
Country	Austria	⌄
	≫ Run	

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

Cumulative Analyses

Learn how cumulative analysis can be set.

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

Displaying Results as Charts

You can display the results of your analysis graphically.

You can choose between bar or pie charts.

To display your results graphically:

1. Execute the analysis, see Executing an Analysis on page 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.
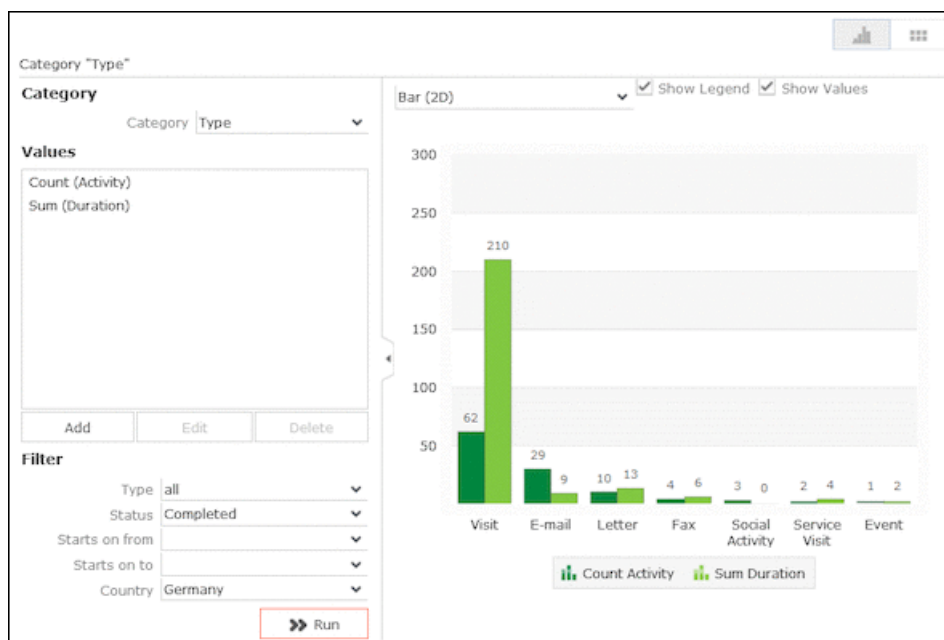
Defining Analyses

Learn to define an analysis.

To define an analysis:

1. Select ![flag icon] (**Queries & Analyses**) > **New Analysis**.

2. The **New: Analysis** window is displayed.

3. Enter the name of the analysis. You must enter a name to save the analysis.

4. Determine whether the analysis is **Private** (only you can access it) or **Public** (anyone can access it).

5. Click on 🔍 (**Select**) next to the **Query name** field and select the query to base your analysis on.

   Various settings are displayed:
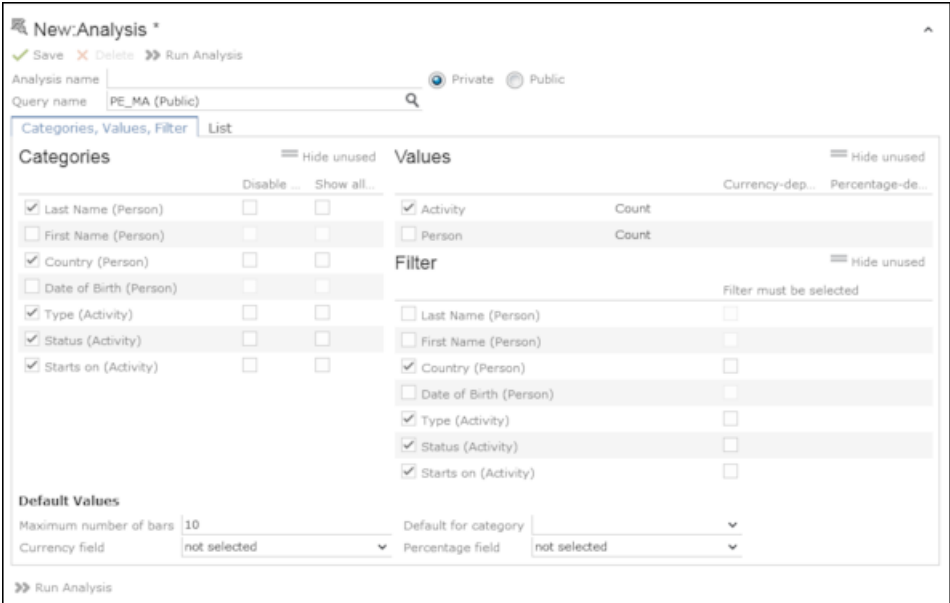
6. Configure the settings as desired. The following options are available:

- 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:
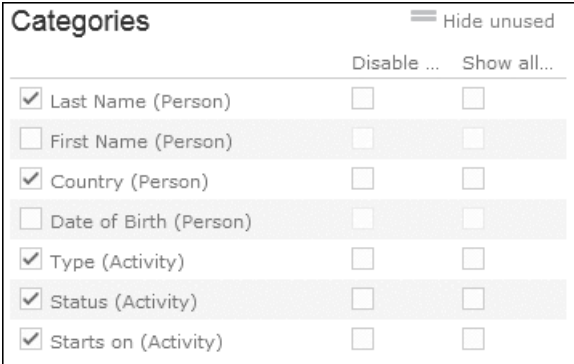
3. The following options are available:

- 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.

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.

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.

2. Select **Drill-Down** from the context menu to further analyze a value according to further criteria. You can also click on a bar or pie in the graphic to display the context menu.

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.

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.
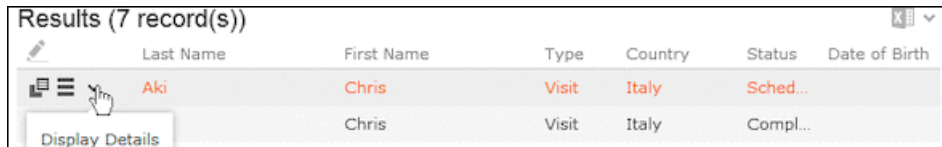
Displaying the Details of an Analysis

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:
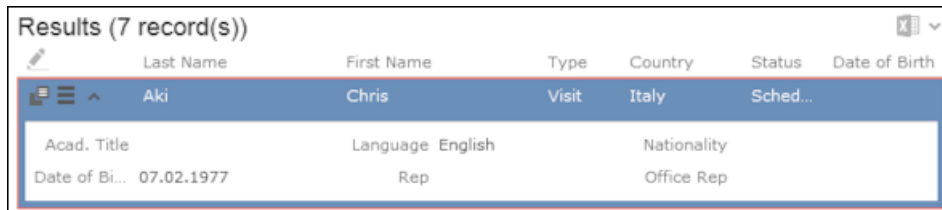
1. Select **Display Details** from the context menu.

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.

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

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.

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

Which filters are available depend on:

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

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

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

Your administrator can 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.

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.

4. 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 ⊘ (**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:

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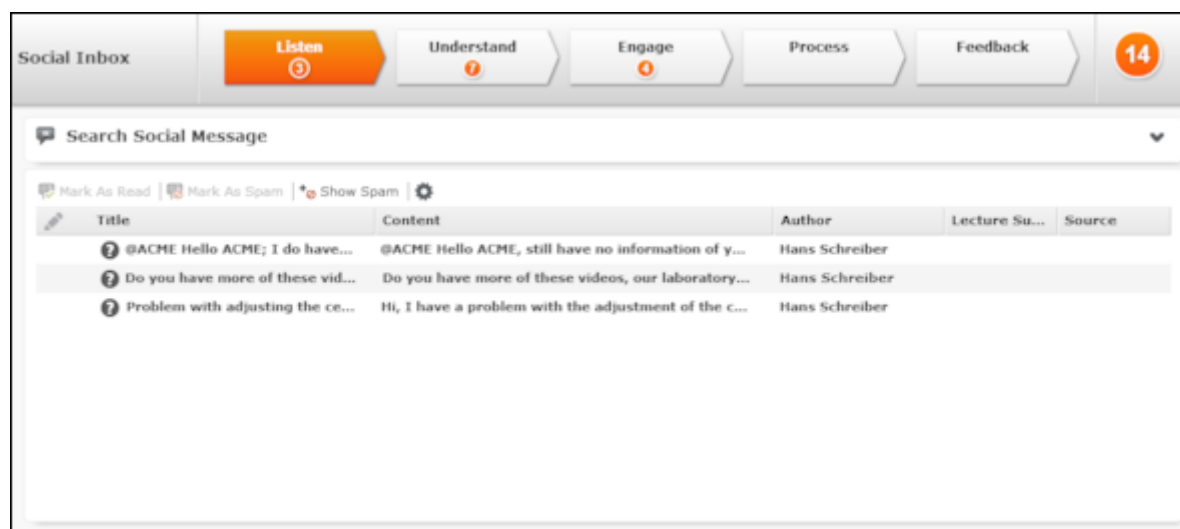
   The twists are provided by the social dispatcher and are automatically imported into the social inbox.

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:
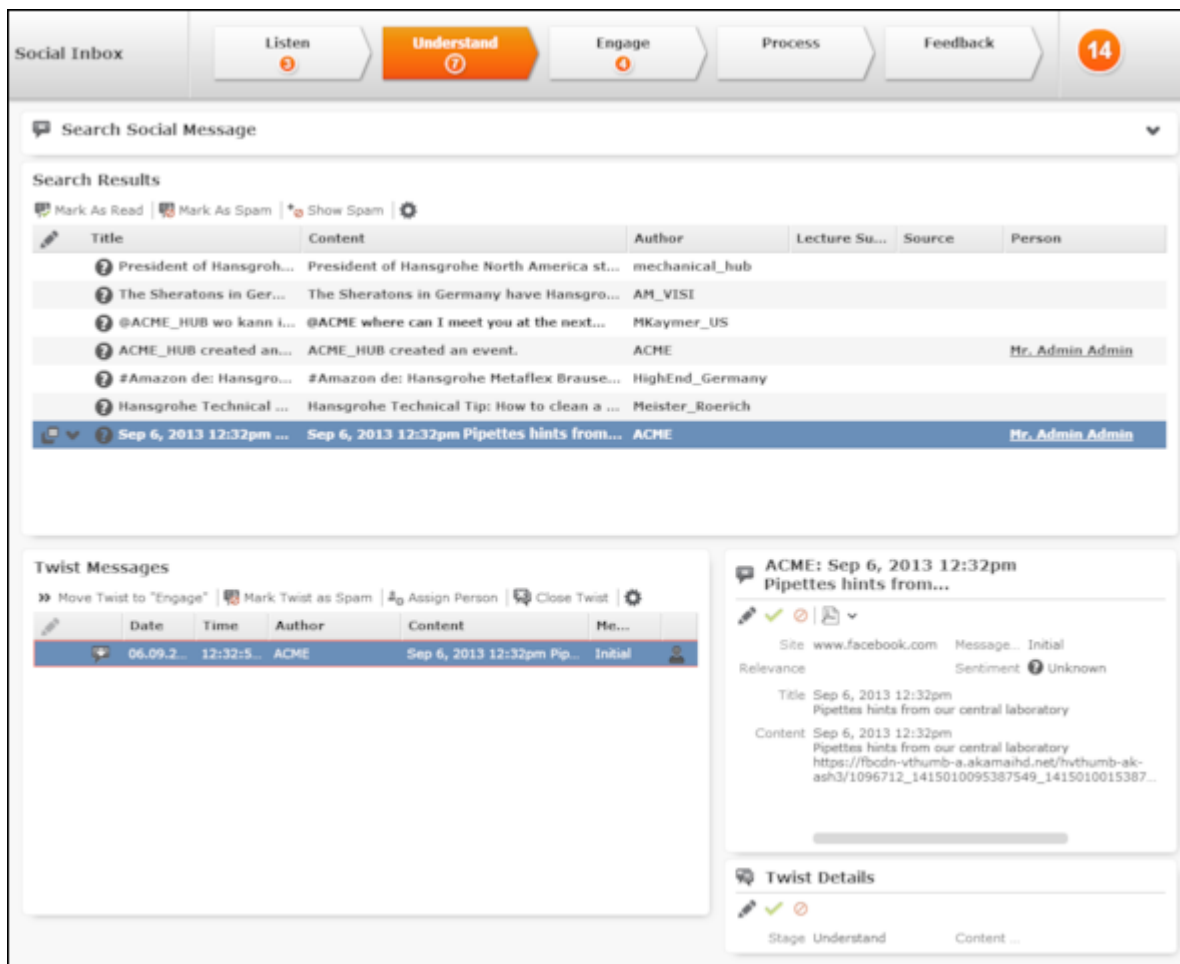
- **Header**: Click on the phase arrows in the header to switch between phases in the social inbox.

  Hover the mouse cursor over a phase arrow to display information on that phase in a tooltip.

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

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

• **Twist Messages**: If you click on an entry in the search results, all the messages in the same twist are displayed here:

   • The original message posted to the social media platform

   • The individual responses you posted to the social media platform from the social inbox

   • All replies and comments from other persons on the social media platform who were involved in the discussion

• Information on the sender and content of the currently selected message are displayed to the right of the **Twist Messages** area. If available, additional **Twist Details** are also displayed.

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

Message Types

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

• To the left of the message:

   • 🗨 (Inbound): Messages originating from the social media platform.

   • 🗨 (Outbound): Messages sent from the social inbox.

• In the **Message type** column:

   • Initial: The initial message. The twist starts with this message.

   • Answer: Outgoing messages, i.e. those sent from the social inbox.

   • Reaction: An incoming message in reply to an answer.

   • Related: All messages that are not one of the previous types.

Marking Twists as Read

Unread twists are displayed in bold.

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

Marking Messages as Spam

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

To mark a twist or message as spam:

1. Select the desired twist or message.

2. Click on ▦ (**Mark As Spam** or **Mark Twist as Spam**).

3. Click on ⁺⊘ (**Show Spam**) in the search results header to display messages marked as spam. The button changes to ⁻⊘ (**Hide Spam**). Click on the button again to view the messages and twists not marked as spam.

Moving Twists Between Phases

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

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

Determining the Sentiment and Relevance of a Message

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

To enter the sentiment or relevance of a message:

1. Select a message in the desired twist in the search results and select the desired message in the twist under **Twist Messages**.

   The details of the message are displayed on the right.

2. Click on ✎ (**Edit**).

3. Enter the **Sentiment** and **Relevance**.

4. Save.

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

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

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

Linking Messages to a Person

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

To link a message to a person:

1. Select a message in the desired twist in the search results.

   All messages in the twist are displayed under **Twist Messages**.

2. Select the desired message and click on 🔧 (**Assign Person**).

3. Search for and select the desired person or add a new person.

   The message is linked with the person (using a social profile record).
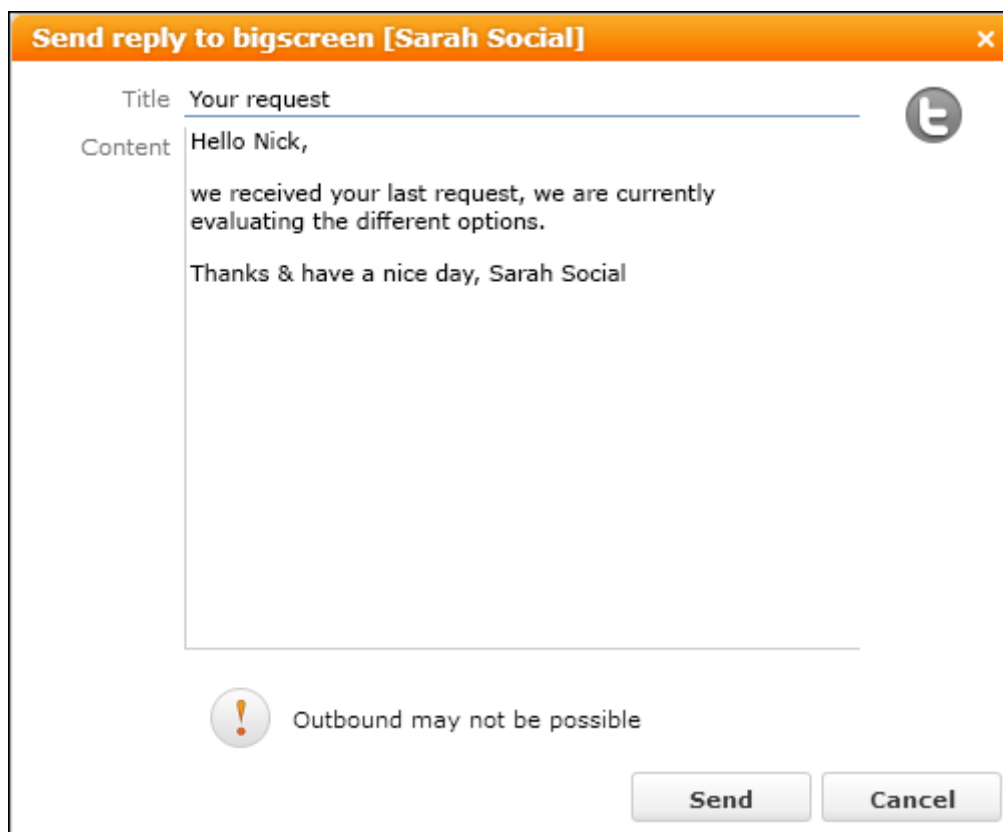
Sending Messages to an Author

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

In order to be able to contact a person, they must be stored in the Aurea CRM database and the message must be linked to the person, >> 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**).

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.

5. Click on 🔍 (**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**.

2. Enter the minimum number of posts required by opinion leaders in the **Number of records** field.

3. Click on **Start Query**.

   All persons who have posted at least this number of messages are listed.

4. Select the desired option from the context menu to further process the record.

Communication Flow

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

To analyze the communication flow:

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

The analysis is displayed.
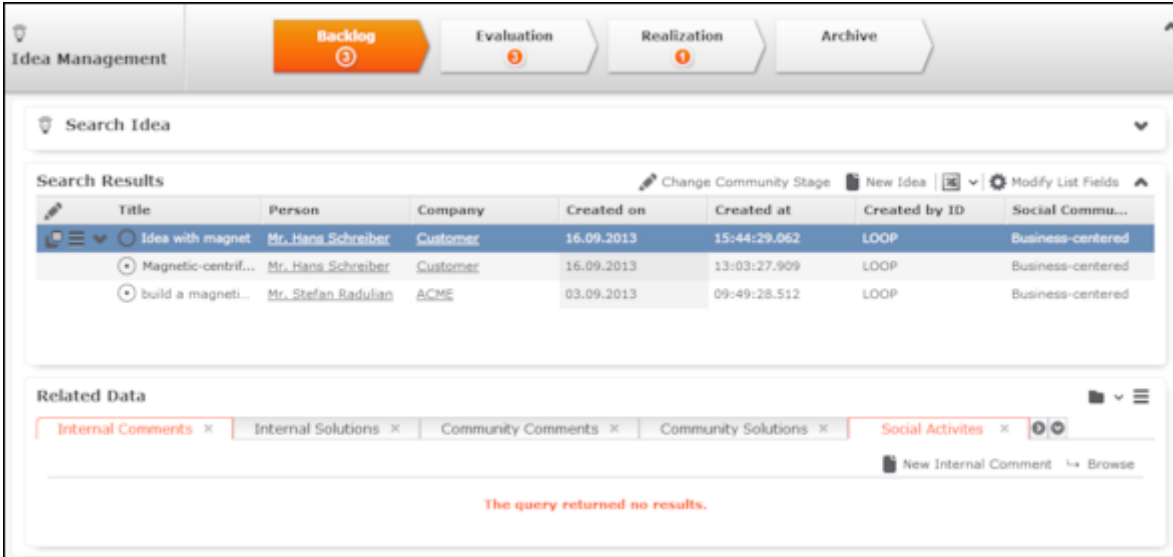
Idea Management

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.

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

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

   • **Evaluation**: During this phase, the idea is analyzed further. The rep needs to decide whether any further processing is necessary, e.g. whether an idea contains a usable suggestion on how to solve the issue that can be feasibly implemented. You can also return the idea to the **Backlog** phase or to the **Archive**.

   • **Realization:** The ideas that are being implemented are listed in this phase.

   • **Archive:** The ideas whose processing is complete are listed in this phase.
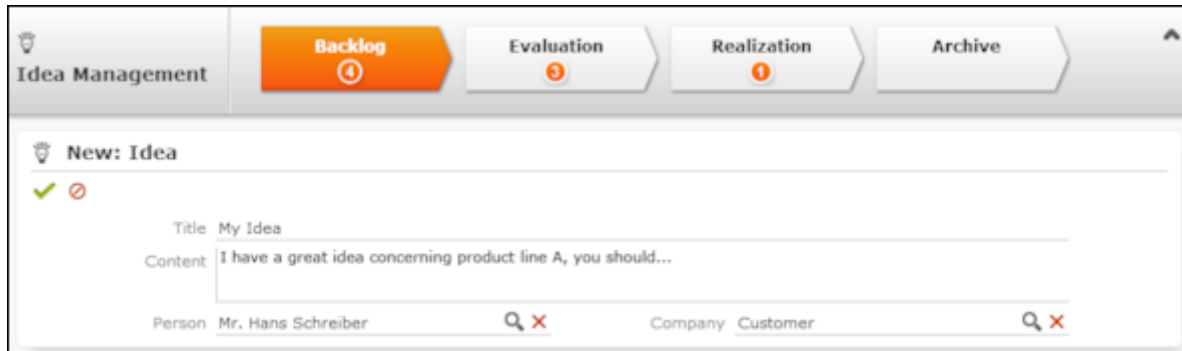
Adding Ideas

To add an idea:

1. You can:

- Select ▢ (**Service**) > **New Idea**.

- Click on ⊕ (**New Idea**) in the idea management process.

    The input mask is displayed.

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

3. 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.
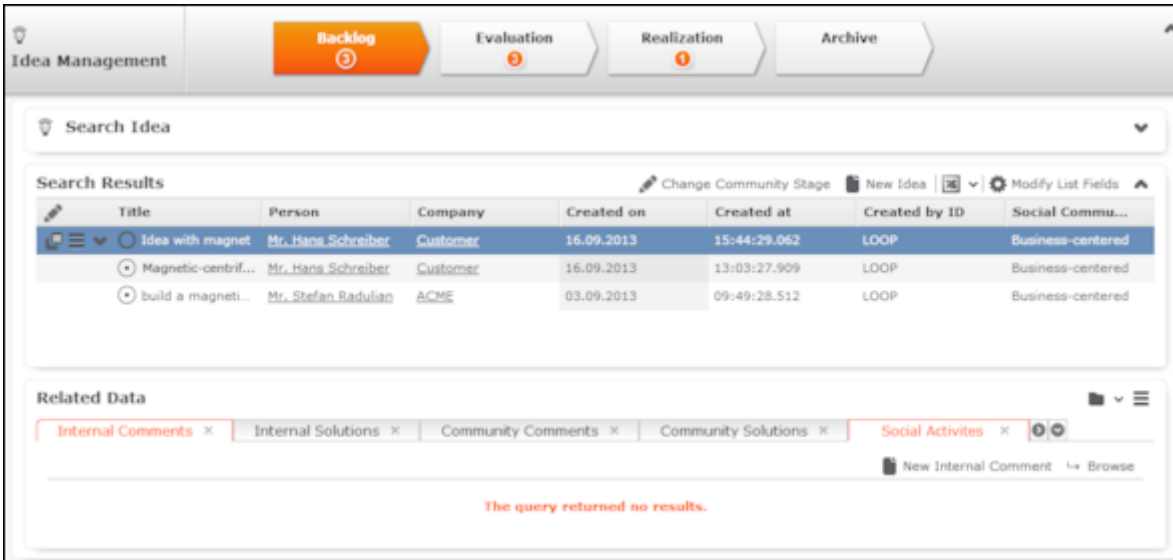
Adding Comments and Solutions to Ideas

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 re-sults.

3. Switch to the desired tab and click on ⊕ (**New**) to add a new record.

4. Activities generated automatically from the social inbox are listed on the **Social Activities** tab.

Yammer

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

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

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

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

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

- The news feed for a record (e.g. a company or opportunity) is displayed in the **Yammer** tab in Aurea CRM web, >> 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:

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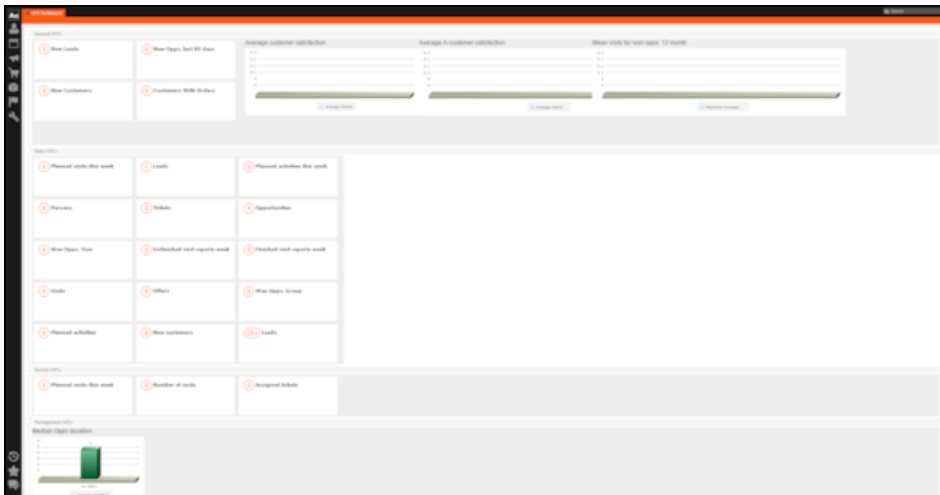
You can find the following metrics displayed in the KPI dashboard under various categories:

KPI Category	Type	Name on the dashboard	Description
General	Query	New leads	Number of new potential customers (leads) developed per 90 days.
General	Query	New Opps. last 90 days	Number of new opportunities in the last 90 days.
General	Query	New Customers	Number of new customers (have placed 1 order) in the last 90 days.

KPI Category	Type	Name on the dashboard	Description
General	Query	Customers With Orders	Number of customers have placed total orders greater than X in the last 12 months. **Note:** The size of an order in the query is defined by your management. Contact your administrator to reset the order size according to your requirement.
General	3D Bar	Average Customer Satisfaction	Average Customer satisfaction score of all customers this year and value from the previous year (measured per calendar year).
General	3D Bar	Average A-customer satisfaction	Average customer satisfaction score in A customers and the value from the previous year.
General	3D Bar	Mean visits for won opps. 12 month	Mean number of visits for the opportunities won in the last 12 months.
Sales Rep	Query	Planned visits this week	Number of visits planned for this week for the current sales representative.
Sales Rep	Query	Leads	Number of leads (potential customers) for the current sales representative.
Sales Rep	Query	Planned activities this week	Number of visits planned for this week for the current sales representative.
Sales Rep	Query	Persons	Number of new persons planned for the current sales representative.
Sales Rep	Query	Tickets	Number of tickets for the current sales representative.
Sales Rep	Query	Opportunities	Number of opportunities for the current sales representative.
Sales Rep	Query	Won Opps. Year	Number of won opportunities for this year for the current sales representative.

KPI Category	Type	Name on the dashboard	Description
Sales Rep	Query	Unfinished visit reports week	Number of unfinished visit reports for this week for the current sales representative.
Sales Rep	Query	Finished visit reports week	Number of finished visit reports this week for the current sales representative.
Sales Rep	Query	Visits	Number of visits planned for the current sales representative.
Sales Rep	Query	Offers	Number of offers for the current sales representative.
Sales Rep	Query	Won Opps. Group	Number of won opportunities for rep's sales team (org group) can be used to compared to other teams (gamification).
Sales Rep	Query	Planned activities	Number of appointments planned for the current sales representative.
Sales Rep	Query	New customers	Number of new customers for the current sales representative.
Sales Rep	Query	Leads	Number of leads (potential customers) for the current sales representative.
Service Rep	Query	Planned visits this week	Number of visits planned for this week.
Service Rep	Query	Number of visits	Number of visits done by the service representative.
Service Rep	Query	Assigned tickets	Number of assigned tickets.
Management	3D Bar	Median Opps Duration	Graph depicting the median of the duration of each opportunity.

Note: If you wish to have KPIs that show more custom information, contact your Aurea CRM administrator to configure your custom KPI queries and Analyses.

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.
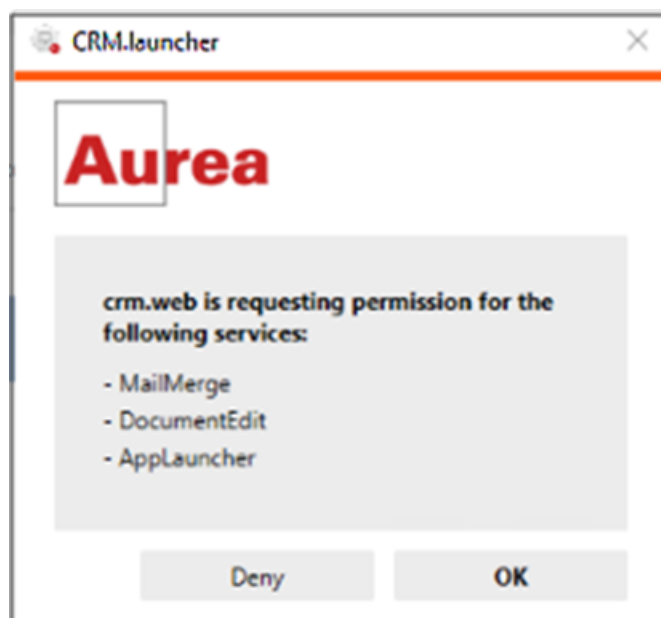
Note: If you switch to a different browser, or clear your browser's cache you are prompted to authorize the communication again.Aurea software recommends using Google Chrome as your browser, as problems may occur under certain circumstances when using Firefox.

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:
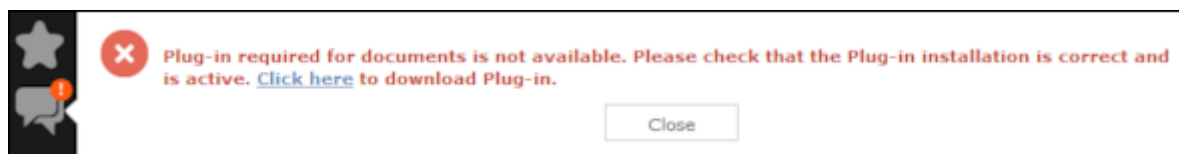
2. Download the application and execute `CRM.launcher.exe`.

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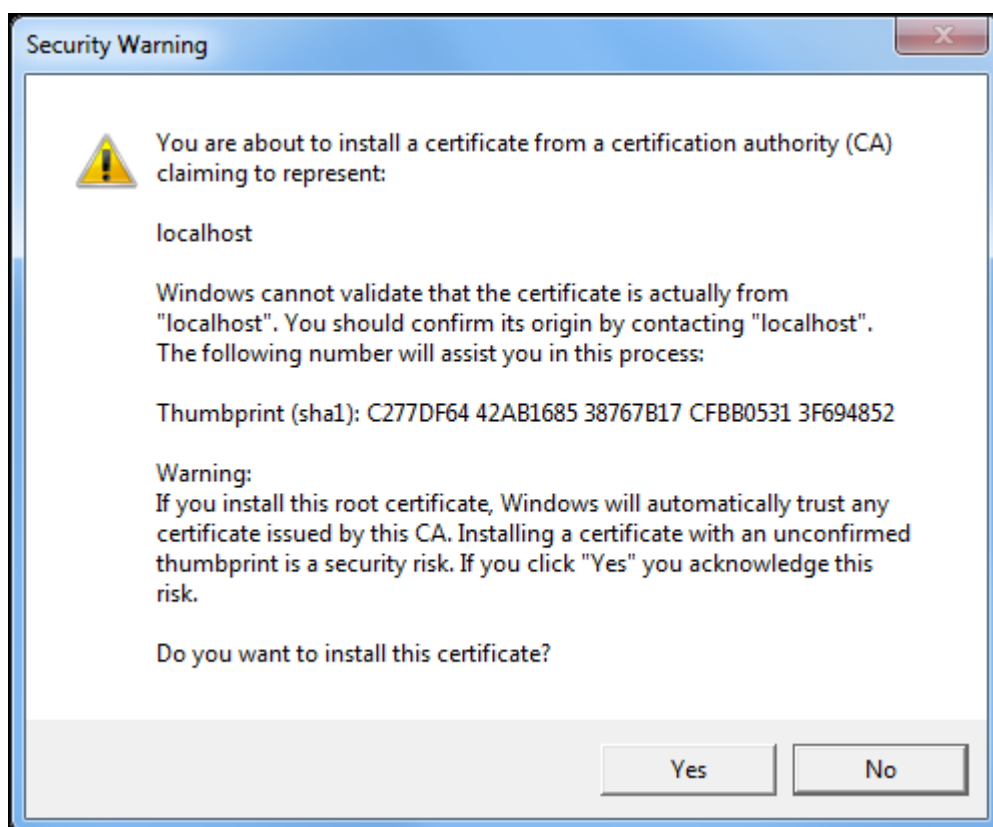
5. Return to Aurea CRM web and perform the action again.

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:
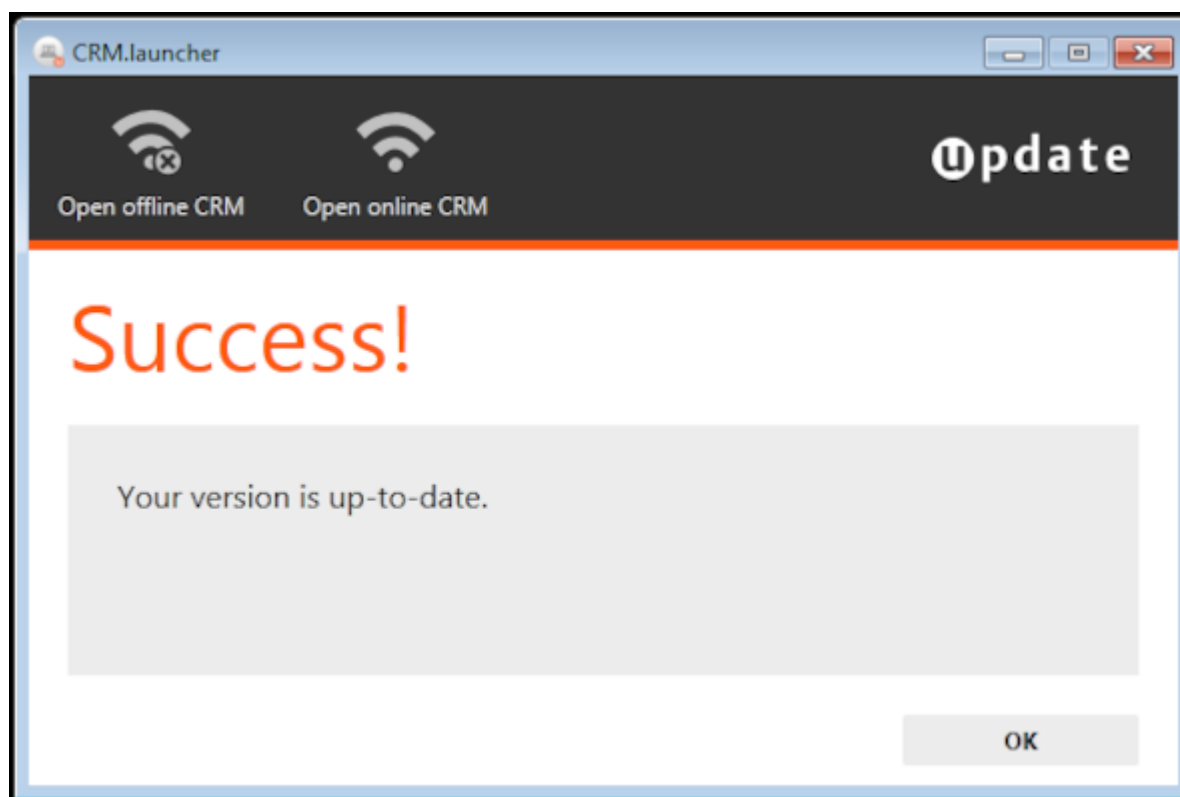
Switching Languages

To change the language:

1. Right-click on the CRM.launcher icon () in the taskbar and select **Settings** from the context menu.

2. Select the desired **Language** from the drop-down list on the **General** tab.

3. Click on **OK**.

Creating Bug Reports

If problems occur while working with Aurea CRM web offline, you can create a ZIP file and send it to your administrator for analysis.

To create an error report:

1. Right-click on the CRM.launcher icon (![icon]) in the taskbar and select **Settings** from the context menu.

2. Switch to the **Troubleshooting** tab and click on (**Create Bug Report**).

   The **Bug Report - Options** dialog is displayed.

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

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

---

4. Click **OK** to save create the ZIP file.

5. You can then send the file to your administrator.

Port Settings

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

Your administrator can determine that you cannot change the port.

Closing and Restarting CRM.launcher

If CRM.launcher is already installed, but you are unable to perform actions requiring CRM.launcher, verify that CRM.launcher is running (the ![icon] 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 ![icon] 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 ![icon](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 (** ![icon] **)** > **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 (** ![icon] **)** > **Maintenance** > **Variables** .

2. Start the search and click on ⊕ (**New**) in the search results' header.

3. Enter a unique **Name** and a **Description** of the variable.

4. To choose the variable's data type, select a field of the same type in the **Info Area Code** and **Field Number** fields.

5. Enable the **Lock** check box to lock the variable and prevent it from being used.

6. Save the record.

Defining Values for Variables

You can define any number of variable values based on a combination of criteria applied to the current rep or station.

Example: Your company has regional offices in several countries. Whenever new records are added, the currency fields should contain "USD" for employees in the US, "EUR" for employees in the eurozone and "SFR" for employees in Switzerland.

To add suitable variable values:

1. Switch to the desired variable and click on ⊕ (**New**) on the **Variable Value** tab.

2. 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:

Enter the value in the appropriate field for the selected field type (**Info Area Code** and **Field Number** selected in the parent variable). Values entered in other fields are not saved.

- For variable catalogs:

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

  Click on 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.

  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.

3. Click on ⚙ (**Show/Hide Columns**) to determine which columns are displayed in the list.

4. Enter all or part of the field name you want to edit in the search field to restrict the listed fields.

5. You can only edit the name in the languages you have been granted access to by your administrator. Click on the desired field. The field's name in all languages is displayed on the right.

6. Click on ❓ (**Help**) to display information on how you can reuse existing field names.

7. Click on ✔ (**Apply all changes**) to apply your changes to the data model.

Catalog Maintenance

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

Catalog maintenance in Aurea CRM web covers the following tasks:

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

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

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

Maintaining Catalogs

To carry out catalog maintenance:

1. You can access catalog maintenance in the following ways:

- From the desired info area when in editing mode:

  1. Click on (**Add/Find Catalog Value**) next to the desired catalog field.

  2. If you have the administrator access rights, click on the **Go to Catalog Maintenance** link in the dialog. This link is not displayed if you do not have administrator privileges.

- From the (Settings) menu:

  1. Select **Settings (** **)** > **Maintenance** > **Catalog Maintenance** .

The search is dis-

played.

2. Enter search criteria to find the catalog you wish to edit:

The Info Area and Catalog drop-down lists only contain those entries that you are permitted to access.

If you select an info area, the Catalog drop-down list only displays catalogs used in the selected info area. If you do not select an info area, all catalogs that you are able to access are listed in the Catalog field.

Enable the language check boxes to limit the search to texts in the selected languages. By default, the catalog base language and the language you are currently using are selected. The catalog base language is automatically selected and cannot be unselected.

3. Click on **Start Search**.

The corresponding catalog values in the selected languages are listed.

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

2. The following dialog is

displayed:

Information on the catalog is displayed at the top, such as the name of the catalog, the catalog number, the info areas the catalog is used in, the parent catalog etc.

You can only edit the sort order and lock/unlock entries in the catalog base language. You can edit the texts in all other languages as well as the external key.

3. Enter the desired values.

4. Click on **Save** to close the dialog. You can use the navigation buttons to move to the previous and next catalog values. When using the navigation buttons, any changes are saved automatically before navigating.

Adding New Catalog Values

To add a new catalog value:

1. Search for the desired catalog, >> Maintaining Catalogs on page 199.

2. Click on ⊕ (**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.
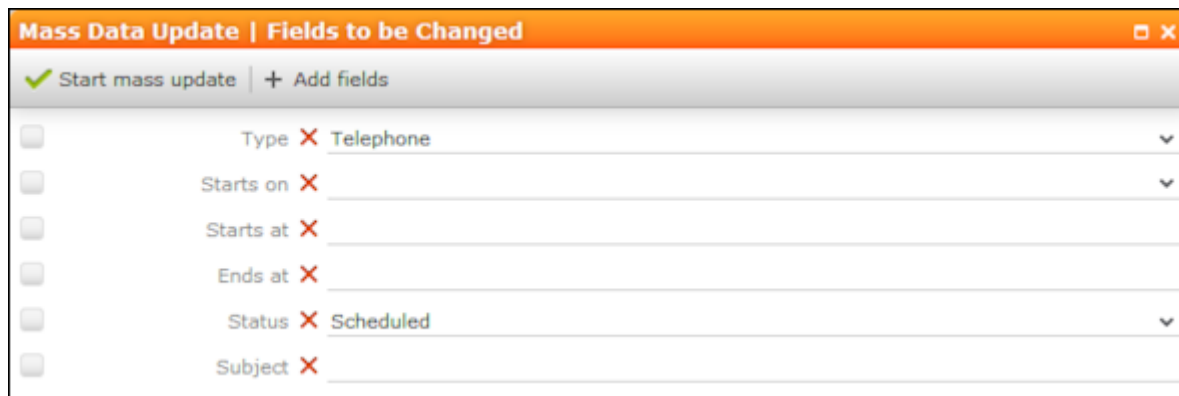
7. Enter can add further fields to this dialog, >> Adding Fields on page 202. Click on ✖ (**Remove Field**) to remove a field from the dialog.

8. If you enter a new value to be entered in the field, the check box to the left of the field is enabled automatically.

9. Enable the check box without entering a value for the field to remove existing values in that field.

10. Click on **Start Mass Update**.

   You are asked to confirm the changes.

11. Confirm the prompt to apply the changes to all records meeting your search criteria.

Adding Fields

To add fields to the **Mass Data Update | Fields to be Changed** dialog:

1. Click on ✚ (**Add fields**).

   All fields in the info area are listed in the **Select Field** dialog.
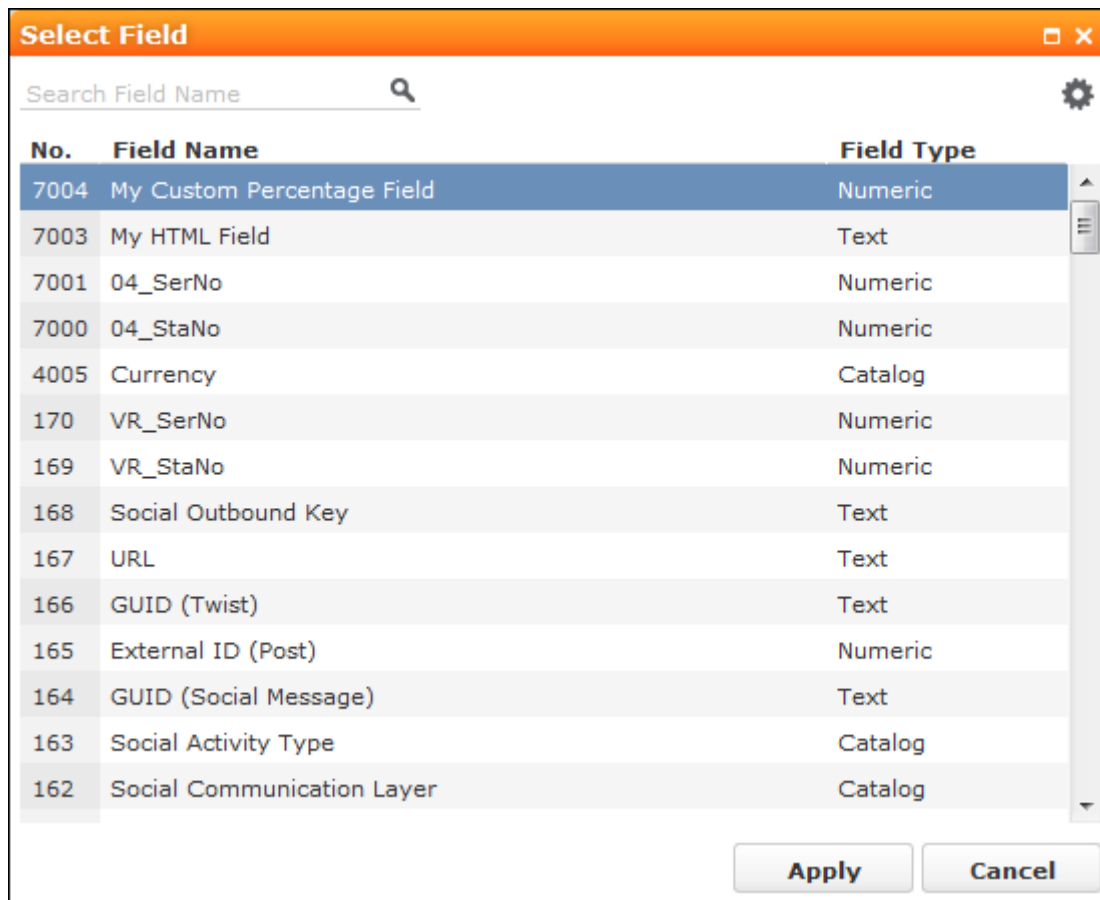
2. Restrict the list of fields by entering the field name (or a portion thereof) in the search field.

3. Click on ⚙ (**Show/Hide Columns**) to determine which columns are displayed in the list.

4. Click on a column header to sort the list by the entries in that column.

5. Click on **Apply** to add the field to the **Mass Data Updates | Fields to be Changed** dialog.

Mass Deletions

To carry out a mass deletion:

1. Select **Settings (🔧)** > **Maintenance** > **Mass Data Operations** .

2. Select the info area, define your search criteria or a filter and verify that you want to delete the records in the list, >> .

3. 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.

Import ✕

ıl↓ Test Import   ▶ Execute   ⬚ Show Log

Format   FI   🔍 ✕   File   **Select File**   No file selected ✕

Fields in the selected format ^

Position	Info area	Field Name	Length	Transformation
0	Company	Ext. System	80	☐
1	Company	External Key	80	☐
2	Company	Company	120	☐
3	Company	Synonym	30	☐
4	Company	Country	80	☐
5	Company	Postal Code	10	☐
6	Company	City	40	☐
7	Company	Country Code	6	☐
8	Company	Area Code	6	☐
9	Company	Telephone	40	☐
10	Company	Rep 1 ID	10	☐
11	Company	Revenue	13	☐
12	Company	Employees	13	☐
13	Company	ABC	1	✓
14	Company	Lead Status	255	☐
15	Company	FreeC1	20	✓

┌─ Separator ──────────────────┐ ┌─ Field format ──────────────────┐

Record   Cr/Lf   ⌄   Date   ⌄

Field   ;   ⌄   Time   ⌄

Field border   ⌄   Decimal sep.   ⌄

First record row   1

Reset

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

Note: Formats are defined by your administrator.

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

Click on ✕ (**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.

	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** .

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 ⊕ (**New Rep**) to add a new record and start the process.

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.

7. 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 ⊕ (**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 ⊕ (**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 ⊕ (**New**).

4. Click on 🔍 (**Select**) next to the **Login role** field to select the role. You can determine the following:

   - Whether the role is **Active** (i.e. can be selected when logging in)

   - Whether the role has **Read only** access

   - Whether the role is the rep's **Default** role. The default role is selected automatically when logging on.

Assigning Multiple Rep Roles

You can assign multiple roles to a rep.

To assign multiple roles:

1. Switch to the desired rep.

2. Switch to the **Rep Role** tab under **Related Data**.

3. Click ⊕ (**Add Multiple Roles**).

4. You can enter a name and login role to restrict the search results.

5. Select the desired entries (Ctrl+Click).

6. Select **Add Role(s) for Rep** from the context menu.
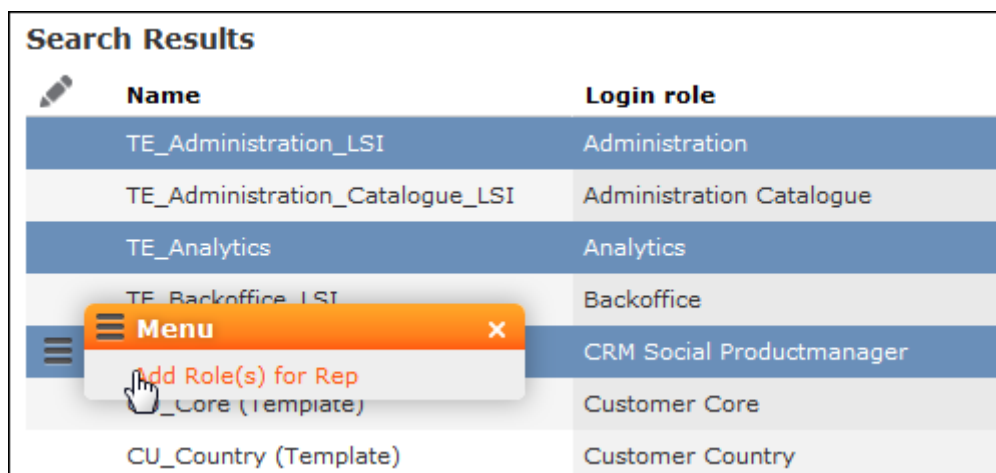
Central Login Configuration

Use the **Central Login Configuration** area to manage logins for offline stations centrally.

To define a central login:

1. Switch to the desired rep.

2. Switch to the **Central Login Configuration** tab under **Related Data**.

3. Click on ⊕ (**New**).

4. Define the following:

   - Enter the users login name, alias, station number etc. under **Overview**.

   - Define which Aurea CRM modules the rep can access under **Module Access Rights**.

   - Define the password under **Password Settings** tab, as well as how often the password needs to be changed etc.

   - Define whether the rep can log on to the system multiple times and whether system locks are ignored under **Lock**.

Assigning Additional Tenants

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

To assign an additional tenant:

1. Switch to the desired rep.

2. Switch to the **Rep Add. Tenant** tab under **Related Data**.

3. Click on ⊕ (**New**) to assign additional tenants.

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 ⊕ (**New**) in the search results.

4. Expense budgets are defined for a particular year and a particular budget type.

5. 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 ⊕ (**New**).

   The input mask is displayed.

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 🔍 (**Select**) and select an access rights format.

5. 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 ⊕ (**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.
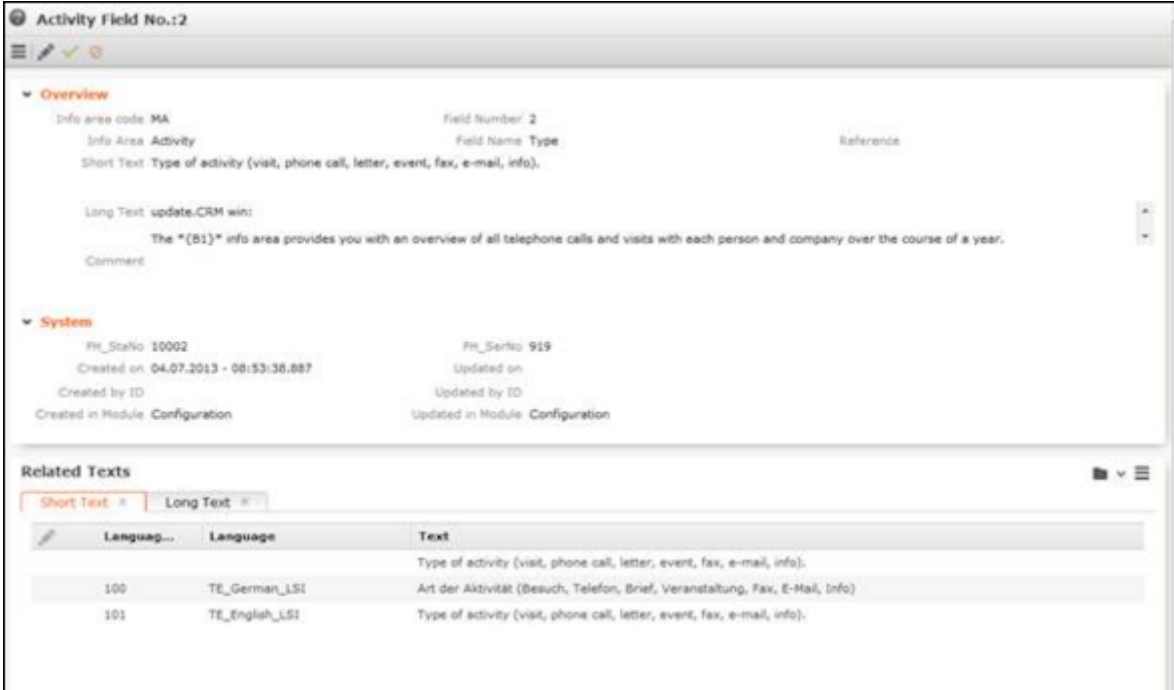
You can edit the default field help:

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.

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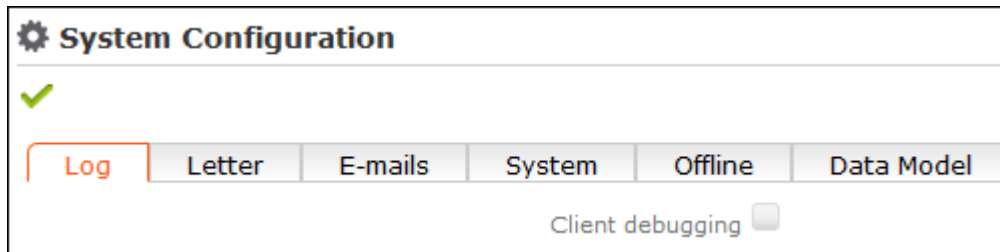
Note: Aurea recommends only changing these settings after consulting your Aurea representative.

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** .
2. 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.

- **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

Document overwrite mode	Prompt before overwriting documents ⌄
E-mail icon action	Open e-mail ⌄
E-mail open separator	Semicolon (Outlook) ⌄
Max. records for search (0 for unlimited)	
Max. number of exported records	1000
Default menu action when a record is clicked	A_Expand
Default action for sub-lists	
Process default action	A_Select
Process default menu	M_Wizard
Company-Related" option off	AU
Favourites	PE,FI,KP,CM
Info areas (or "ALL") with disabled Table Caption Cache	
AutoSearch default value for linked searches	☑
Max. number of history records	10
Transfer configuration information to XML exports	☐
Enable link deletion	☑
Only match up persons in same company	☐
Users can rearrange 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.

- **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.

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

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

- **Analysis rights:** Assign appropriate analysis access rights:

  - disabled: Users are unable to execute analyses.

  - read-only: Users can carry out predefined queries but are unable to define new analyses.

  - read + define: Users can edit existing analyses and add new ones. Analyses can be saved as private analyses.

  - all: Users can also define global analyses.

- **Analysis criteria are case-sensitive:** Enable this check box to restrict the results of the analysis using upper and lower case.

- **Available categories for date fields in analyses:** Enter the categories available to users for evaluating data.

CRM.phone Tab

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

Layout	Handling	Queries	Analyses	CRM.phone	
		Incoming call action	Popup question		⌄
Format of area and country code suggestions for telephone ...		+{countryCode}({areaCode}) {number}			
	Show CRM.phone panel on phone event	☐			

- **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 (**![icon]**)** > **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 (**![icon]**)** > **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:
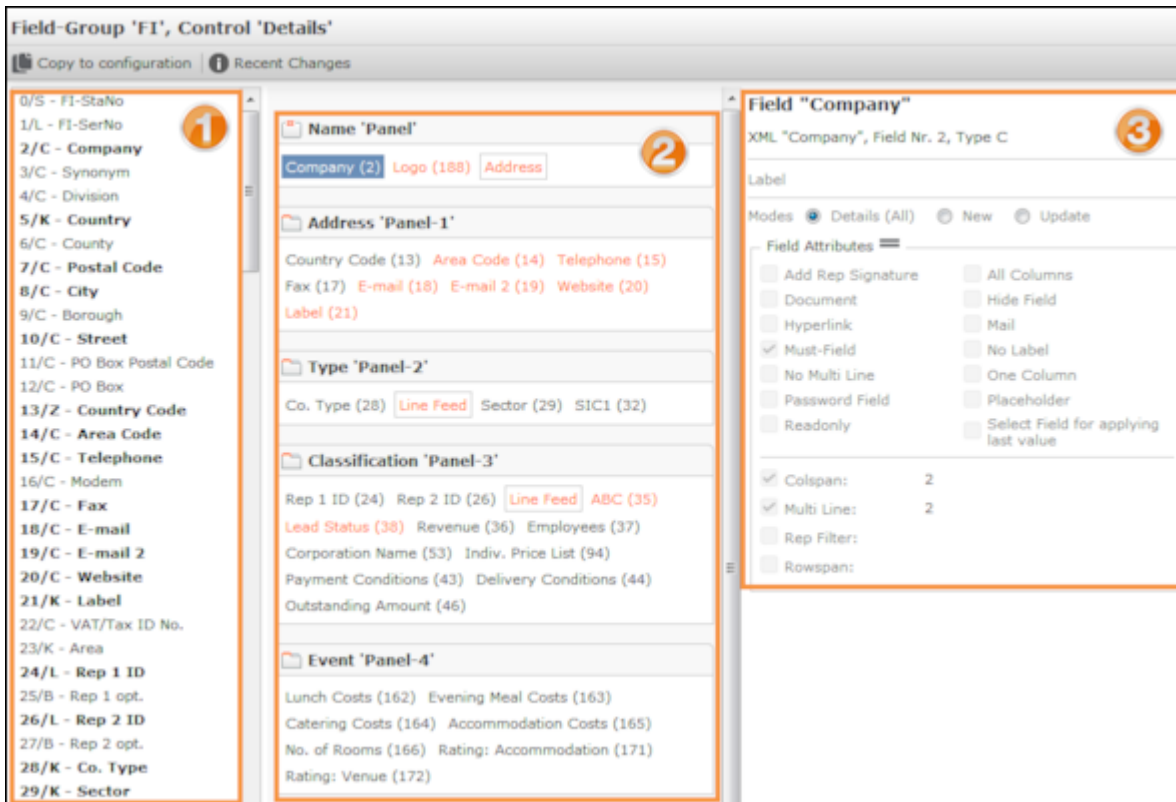
The CRM.designer window consists of the following areas:

- 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 (). Fields added to a panel are displayed in bold.

- The **panels** and the fields added to the panels (). 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 ✖ to remove a panel (or combined field).

    • **Add combined fields**: Click on **Add new Combined Field**. Drag the fields you want to combine in the field to the combined field. Combined fields are indicated with the 🖼 icon.

       A combined field displays information from multiple fields in a single field in view mode.

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

For more information, >> 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 × (**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 ⌄ in the **Select a text** dialog to select the desired text group and text.
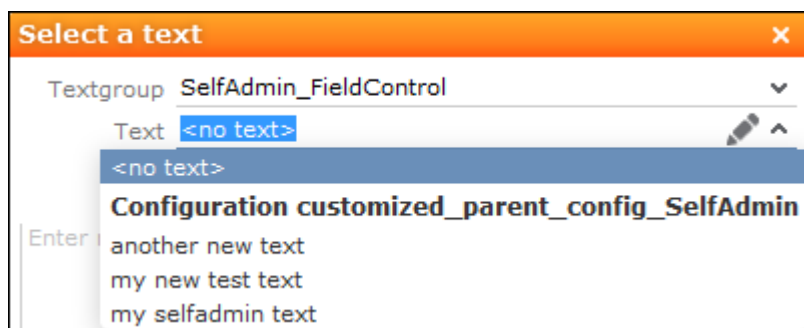
3. Click on **Select** to assign the text.

4. To remove the text, click on ✎ (**Edit Text**) and then on **Remove Text Reference**.

Adding a New Label Text

To add a new text:

1. Click on ✎ (**Edit Text**) to the right of the **Label** field.
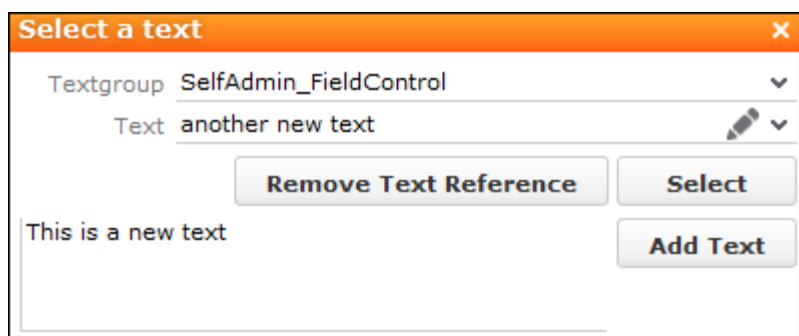
2. Enter the new text in the text field at the bottom of the dialog and click on **Add Text**.

Texts are stored in text groups. If you have entered a new text and the `*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+<Number>	Displays the tab at the corresponding position, e.g. Alt+3 opens the third tab. **Note:** You first need to activate the **Related Data** area with Alt+0.
Enter	Starts the search (provided the cursor is in the search area).
Alt+L	Activates the results list (the first record in the list is selected).

Lists in View Mode

Shortcut	Description
Up cursor key	Selects the previous entry.
Down cursor key	Selects the next entry.
Page Up	Selects the first entry on the current page. If the first entry is already selected, the view switches to the previous page.

Page Down	Selects the last entry on the current page. If the last entry is already selected, the view switches to the next page.
Home	Switches to the first page.
End	Switches to the last page.
Space	Switches to edit mode.
Esc	Quits edit mode. Any changes are not saved and the previously saved data is restored. If a drop-down list is open, use Esc to close it.

Lists in Edit Mode

Shortcut	Description
Esc	Quits edit mode. Any changes are not saved and the previously saved data is restored. If a drop-down list is open, use Esc to close it.
Right cursor key	Moves one character to the right within a field.
Left cursor key	Moves one character to the left within a field.
Tab	Moves to the next editable field. If the current field is the last editable field in a row, the cursor moves to the first editable field in the next row. Changes to the current row are saved in the process.
Shift+Tab	Moves to the previous editable field. If the current field is the first editable field in a row, the cursor moves to the last editable field in the previous row. Changes to the current row are saved in the process.
Up cursor key	Switches to the same field in the previous row. Changes to the current row are saved in the process. **Note:** If the field is a drop-down list, use Ctrl+Up instead.

Down cursor key	Switches to the same field in the next row. Changes to the current row are saved in the process. **Note:** If the field is a drop-down list, use Ctrl+Up instead.
Ctrl+Alt+N	Adds a new record to the info area displayed in the list.

MiniDetails

Shortcut	Description
+	Displays the mini details for the selected record in a list.
-	Closes the mini details for the selected record in a list.

Tab View in Edit Mode

Shortcut	Description
Tab	Switches to the next field and saves all data entered in the current field.
Shift+Tab	Moves to the previous editable field or previous action.
Alt+0	Activates the **Related Data** area.
Alt+<Number>	Displays the tab at the corresponding position, e.g. Alt+3 opens the third tab. **Note:** You first need to activate the **Related Data** area with Alt+0.
Ctrl+S	Saves the record.

Catalog Fields in Edit Mode

Shortcut	Description
Down cursor key	Opens a closed drop-down list and displays the available values.
Alt+ or Esc	Closes an opened drop-down list and resets the value to the previous value.
Enter	Selects the currently highlighted value.
Up cursor key	Moves to the previous value in the drop-down list.
Down cursor key	Moves to the next value in the drop-down list.
Page Up	Moves up one page in an opened drop-down list.
Page Down	Moves down one page in an opened drop-down list.
Any letter	The first entry that begins with the letter is highlighted.

Check Boxes / Radio Buttons in Edit Mode

Shortcut	Description
Space	Toggles the status of the check box/radio button.

Popups

Shortcut	Description
Esc	Closes the popup.

Calendar / Daily and Weekly Planning in Edit Mode

Shortcut	Description
Any letter	If a time period has been selected, a text field is displayed.
Enter	If you have entered text in a text field in the calendar, adds a new activity with the text as its subject.
Tab	Moves to the next entry if an entry is selected in the calendar.
Shift+Tab	Moves to the previous entry if an entry is selected in the calendar.
Del	Deletes the selected entry.

Resource View / Visit Planning in Edit Mode

Shortcut	Description
Del	Deletes the selected entry.

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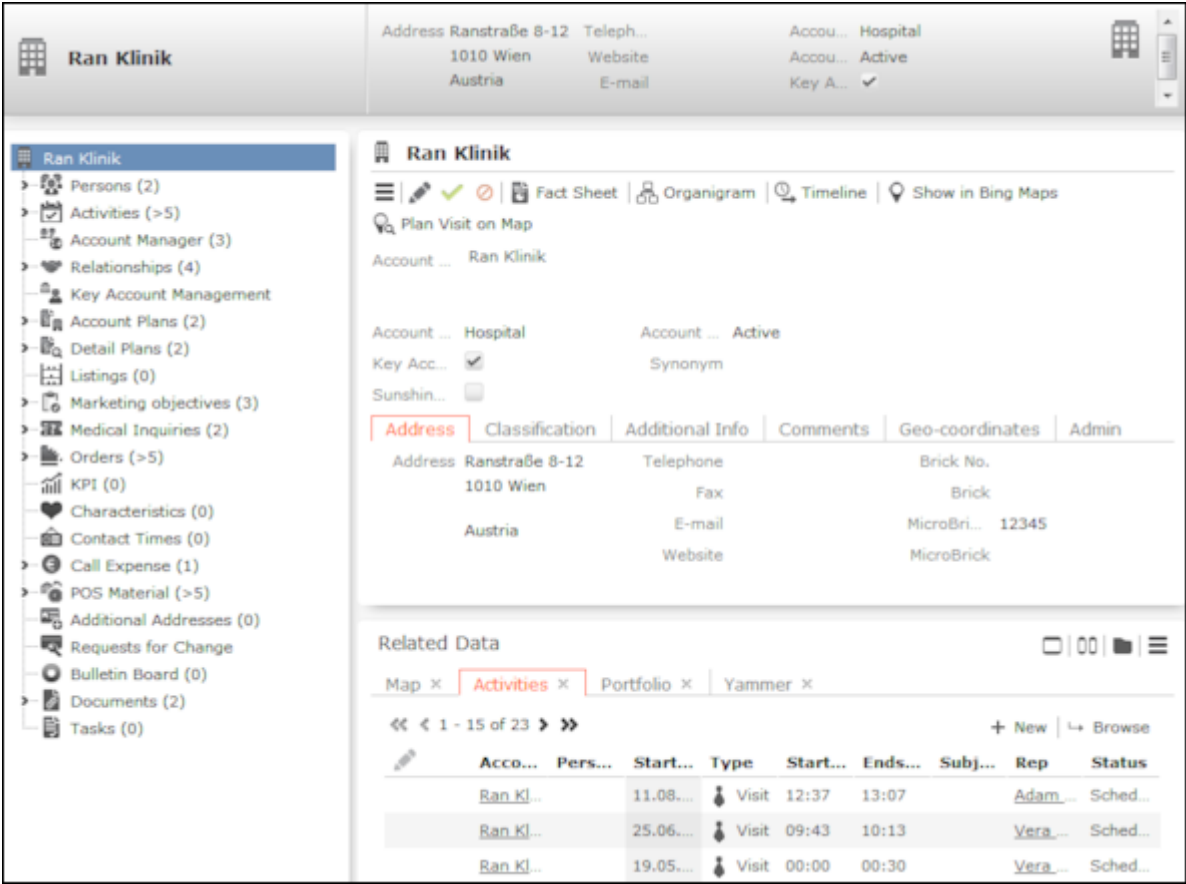
* Select 👤 (**Master Data**) > **Persons** to search for persons.

  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:

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 ![icon] (**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 ![icon] (**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 ⊕ (**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 ⊕ (**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 ![icon](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 ⊕ (**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 ⊕ (**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.

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 + at the top left of the organigram to display all persons for all accounts; click on - 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 ![icon] (**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.

3. Click on ![icon] 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 ⊕ (**New**) in the results list.

4. You can click on 🔍 (**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 ⊕ (**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 ⊕ (**New**) in the results list. A dialog opens.

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 ⊕ (**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.

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5. Save the record.

Adding Characteristics to Characteristic Groups

To define a characteristic:

1. Select ![Settings icon] (**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 ⊕ (**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 icon] (**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 ⊕ (**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:

1. Select ![icon] (**Settings**) > **Maintenance** > **Characteristic Definitions**.

2. Click on ⊕ (**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 ![icon] (**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 ⊕ (**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 ![wrench icon] (**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 ⊕ (**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 ⊕ (**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.

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 ⊕ (**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.

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 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 ⊕ mouse cursor is displayed to scroll in the network.

  - Click on a node and then click on it again while holding down the mouse button 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 disabled	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.

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 ⊕ (**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.

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 ![icon] (**Settings**) > **Maintenance** > **Relationship level**.

2. Click on ⊕ (**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.

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 ◀ 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 ⊕ mouse cursor is displayed to scroll in the network.

  - Click on a node and then click on it again while holding down the mouse button 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 disabled	**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 ⊕ (**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):
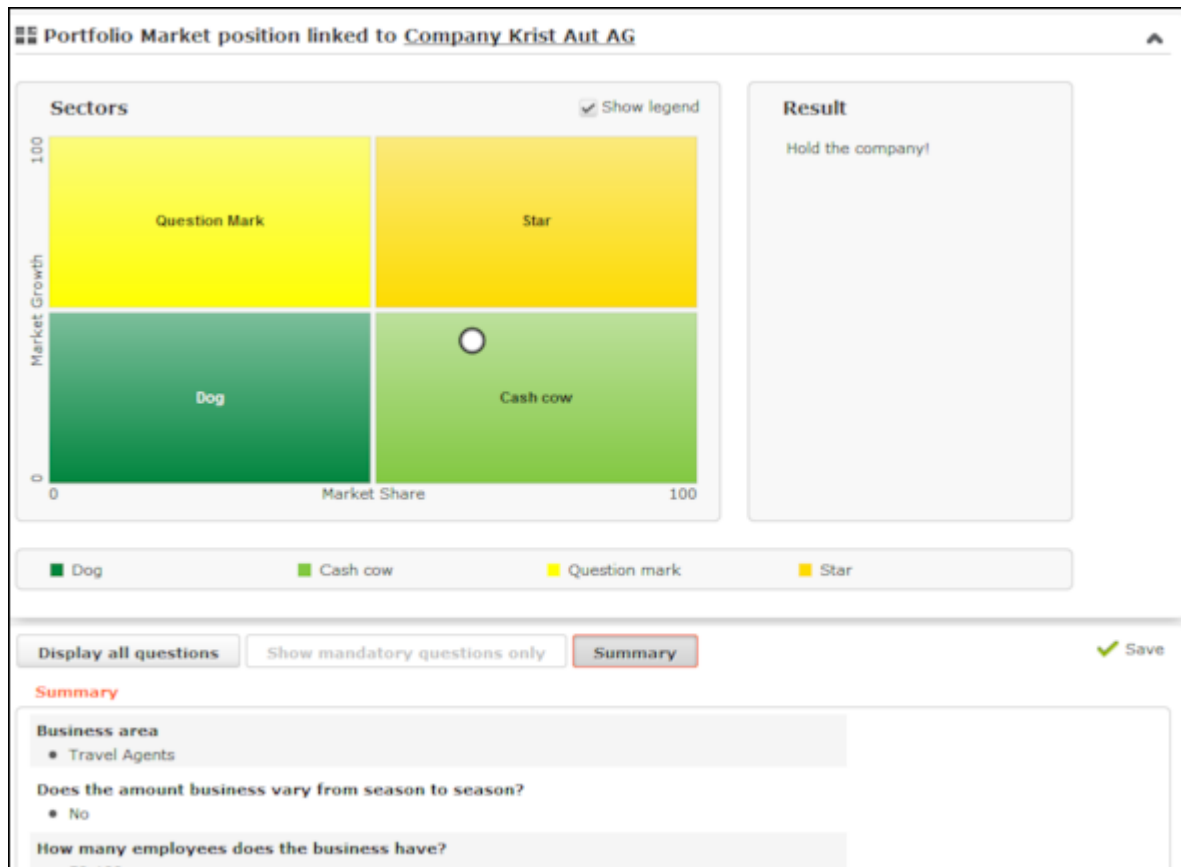
4. Answer the questions. The white circle in the sector overview moves to the appropriate sector depending on your answers.

   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 ⊕ (**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 ⊕ (**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.

8. 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 ⊕ (**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.

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 ⊕ (**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.

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

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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**.

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8. 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 ⊕ (**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 ot 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.
2. 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 ⊕ (**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 ![icon] (**Sales**) > **KPI (Global)**.

2. Click on ⊕ (**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 ![icon] (**Reporting**) > **KPI Report** to generate the report.

Select ![icon] (**Print**) to print the report.

Example (OTC):

KPI Report for Sally Sales (9101)

①	Workdays	Administration	Others	Visit	Conference	Sick leave	Meeting/Education	Holiday
Total	10	0,00	1,00	8,00	1,00	0,00	0,00	1,00

②

	Visits	Product Detailing	Medical Inquiry	Tandem activity
-	0	0	0	0
A	8	0	0	0
B	0	0	0	0
C	1	0	0	0
D	0	0	0	0
E	0	0	0	0
Total	9	0	0	0

③ Visits / Workday — 0,90

Visit spread

A , 88%
E , 0%
D , 0%
- , 0%
C , 11%
B , 0%

— Targeted accounts —

④

	No. of visits Actual	Target	Ratio	Targeted accounts	0	1-4	5-7	8-12	13+
-	0	0			0	0	0	0	0	0
A	8	25	32%		3	1	1	1	0	0
Hospital	5	17	29%		2	1	0	1	0	0
Bern Hospital					0					
BernWest Hospital							5			
Pharmacy	3	8	38%		1	0	1	0	0	0
Aki Pharmacy					3					
B	0	0			0	0	0	0	0	0
C	1	5	20%		1	0	1	0	0	0
Hospital	1	5	20%		1	0	1	0	0	0
Rot Hospital					1					
D	0	0			0	0	0	0	0	0
E	0	0			0	0	0	0	0	0
Total	9	30	30%		4	1	2	1	0	0

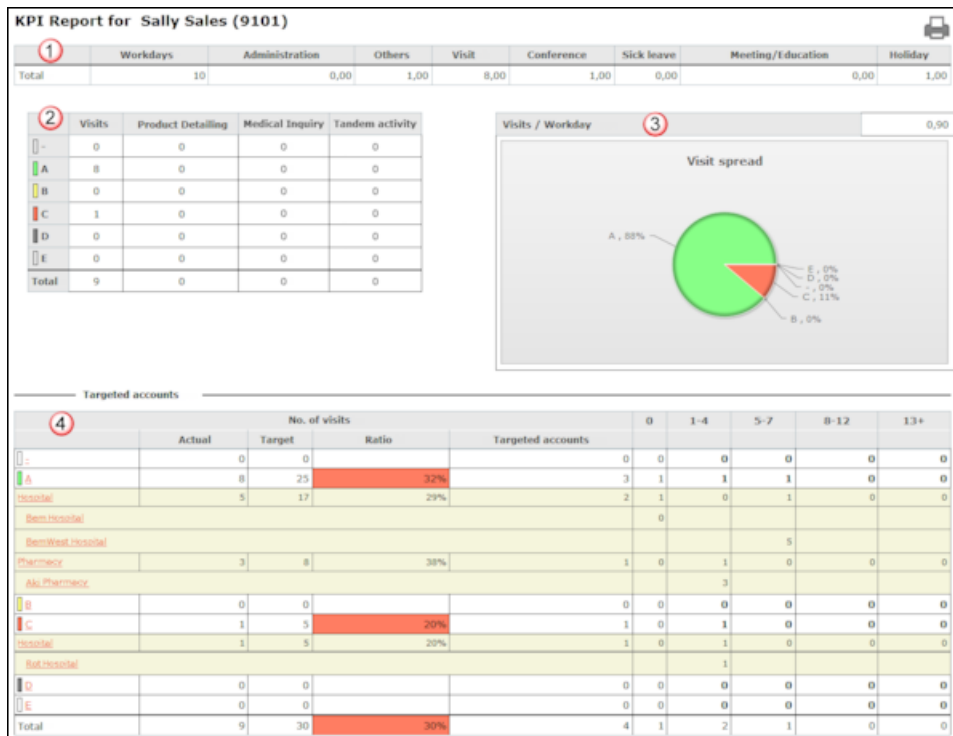|	
①	Displays the work you have entered and your work days for the current year up to the current date. This data is taken from the entries in the occupation report, see Occupation Reporting – LSI on page 455.
②	Displays the number of **completed** visits broken down by the **classification** defined 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 percentage 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.

2. 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 ⊕ (**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 (**Sales**) > **KPI (Global)**.

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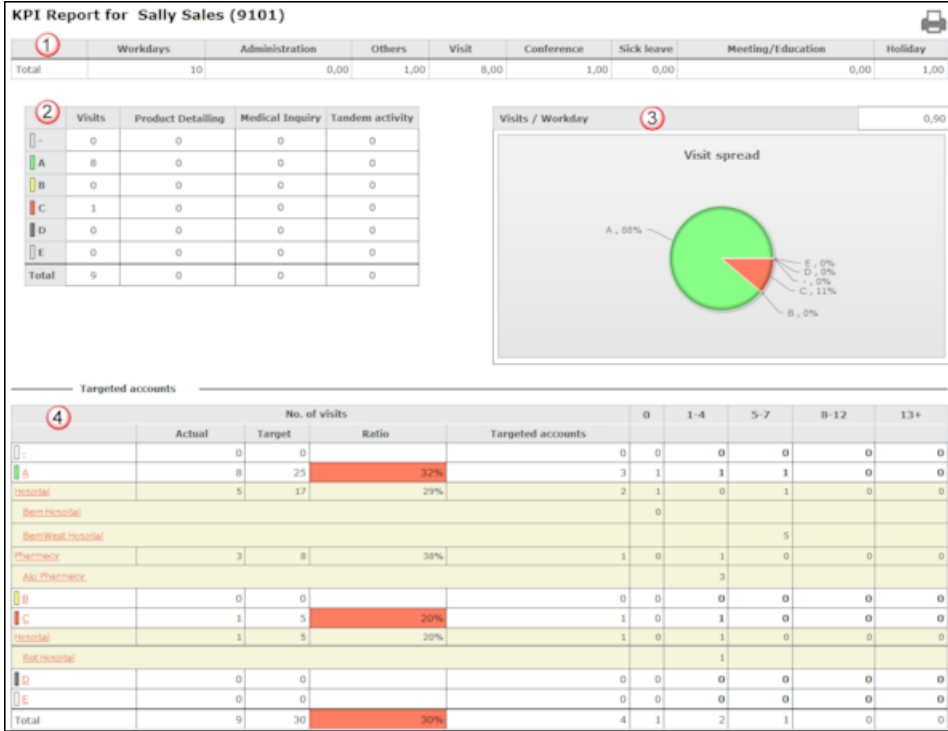
Depending on your business area, calls are either broken down by account type (OTC) or the specialty of persons (Rx).

> **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):

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.
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 percentage 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.

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:

1. 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.

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.

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.
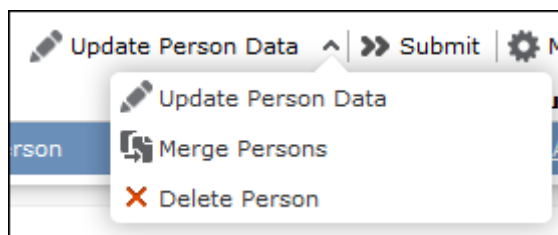
A request for change is added whenever you add, edit or delete account and person data. You can also request that duplicate companies and persons (not roles) are merged. Back office staff are informed of the request and can also apply the necessary changes to your ERP system.

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**.
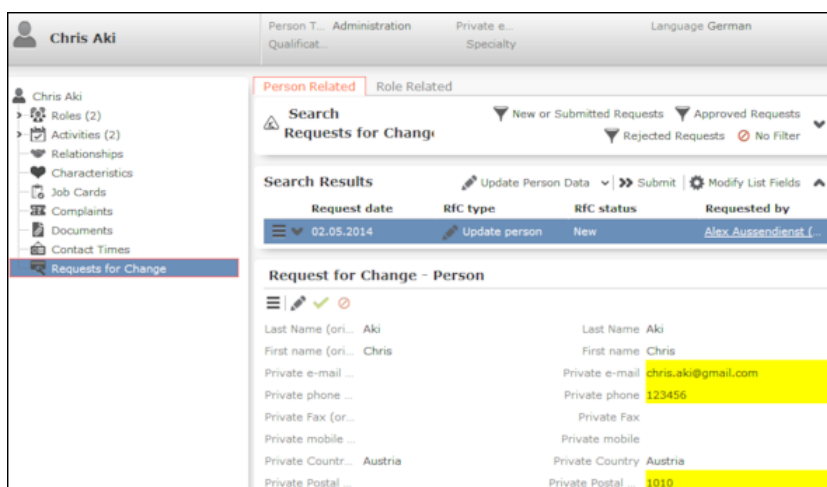

• If you select **Delete Person**, a new request for change is added with the **RfC type** set to **Delete person** and the RfC status **New**.

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.

    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 (✔) or reject it (⊘). 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 ![icon] (**Reference book**) > **Requests for Chang**e 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 ![icon] (**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.
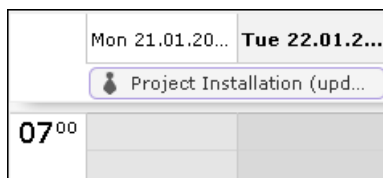
Calendar

The calendar displays activities, tasks and other appointments.

To open the calendar, select (**Daily business**) > **Calendar**.
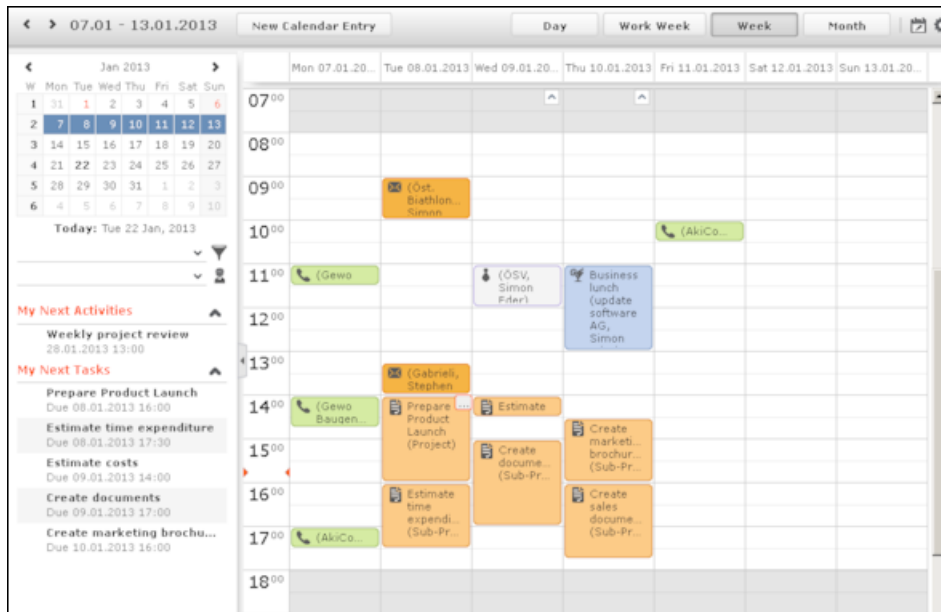
The different functions and features are explained below:

- 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 ❷ (**Legend**) to display an overview of the color-coding in the calendar.

- Click on the entries in the header to determine whether to display a **Day**, **Work Week**, full **Week** or **Month** in the calendar.

- The orange cursor in the time bar indicates the current time.

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


- Concurrent appointments cannot be displayed in the week view of the calendar. Click on "…" to display these appointments in a new window.
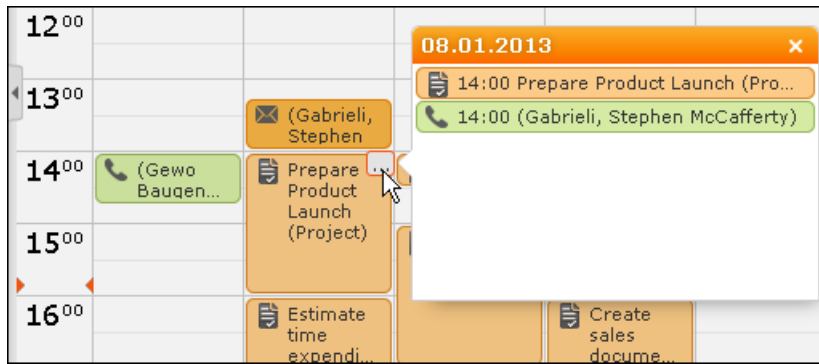
- Only a limited number of appointments can be displayed per day in the monthly view. Click on **+ x more** to display all the appointments in a separate window.

- If appointments have been entered that cannot be displayed in the visible area, the following icon is displayed at the bottom edge of the visible area:
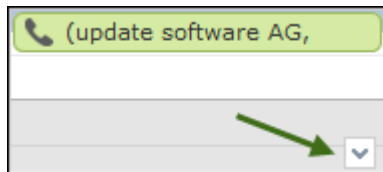
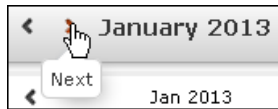- You can display or hide the sidebar.
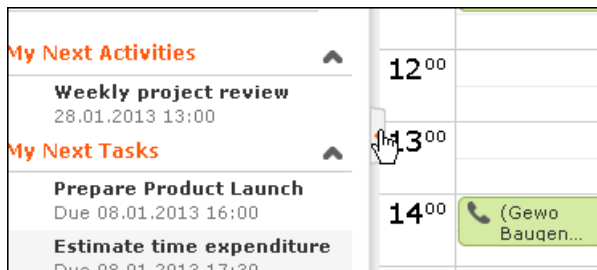
- You can display your most important appointments (e.g. your next 5 activities) in the sidebar. Select (**Settings**) > **User Configuration** to select which items to display in the sidebar (**Activities** tab). Your administrator can determine how many records are displayed.

- You can filter the records displayed in the calendar to only display those you require, see Filtering Appointments on page 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.

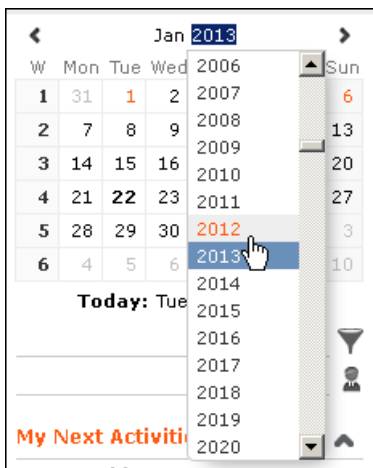Various tasks that can be performed on calender are:

Navigating in the Calendar

You can navigate in the calendar using the following options:

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

- 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.
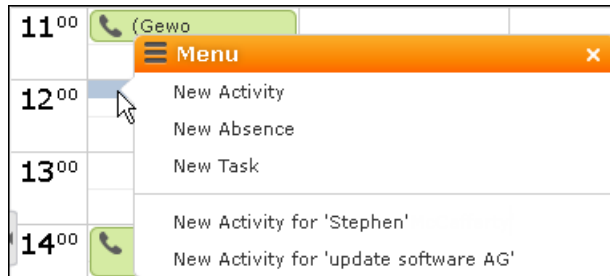
Adding Appointments

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.
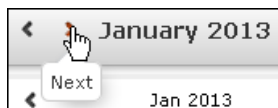
To delete an appointment:

• 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.

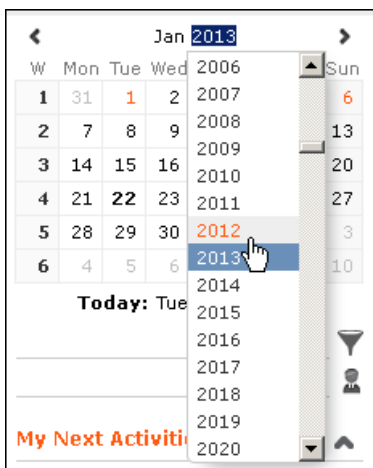• Select **Delete** from the context menu.

Navigating in the Calendar

You can navigate in the calendar using the following options:

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

• 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 308.

- Click on ▣ (**Call Planning**) to open the call planning area, >> 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, >> Adding Activities on page 292, Adding Tasks on page 304 and Adding Other Appointments on page 307.

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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, >> 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.

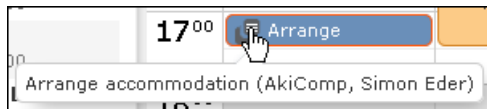2. Click on a free time slot in the calendar.

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 (**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.

4. To save your selection to be reused later, enter a name in the **Rep Set** field and click on **Save**. The filter set is saved.

> **Note:** The first value in the drop-down list has no name; however you can select this entry and change its settings. Changes made to this entry are saved automatically. To delete a filter set, select the desired filter from the drop-down list, click on (**Define Filters and Filter Sets**) and then click on **Delete**.

5. Click on **OK**.

Defining Rep Filters

To define a rep filter:

1. Click on (**Reps and Rep Groups**) in the sidebar. The **Reps and Rep Groups** window is displayed.

2. Enable the check boxes next to the reps or groups whose appointments should be displayed.

3. To add additional reps to the list:

   a. Click on **Add/Remove Reps**.

   The **Select Rep** window is displayed, see Selecting Reps on page 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.

4. To save your selection to be reused later, enter a name in the **Rep Set** field and click on **Save**. The filter set is saved.
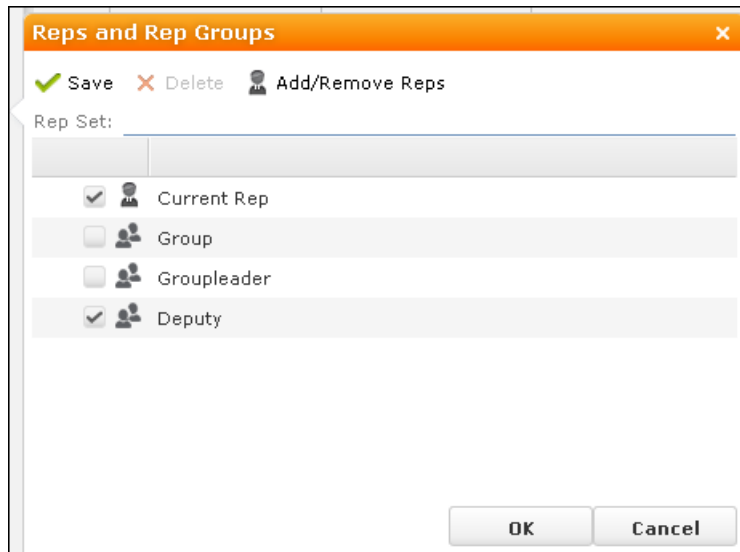

Note: The first value in the drop-down list has no name; however you can select this entry and change its settings. Changes made to this entry are saved automatically.To delete a filter set, select the desired filter from the drop-down list, click on ▼ (**Define Filters and Filter Sets**) and then click on **Delete**.

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5. Click on **OK**.

Defining Rep Filters

To define a rep filter:

1. Click on 🮲 (**Reps and Rep Groups**) in the sidebar.

   The **Reps and Rep Groups** window is displayed.

2. Enable the check boxes next to the reps or groups whose appointments should be displayed.

3. To add additional reps to the list:

   a. Click on **Add/Remove Reps**.

      The **Select Rep** window is displayed, >> Selecting Reps on page 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 🮲 (**Reps and Rep Groups**) and then click on **Delete**.

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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.
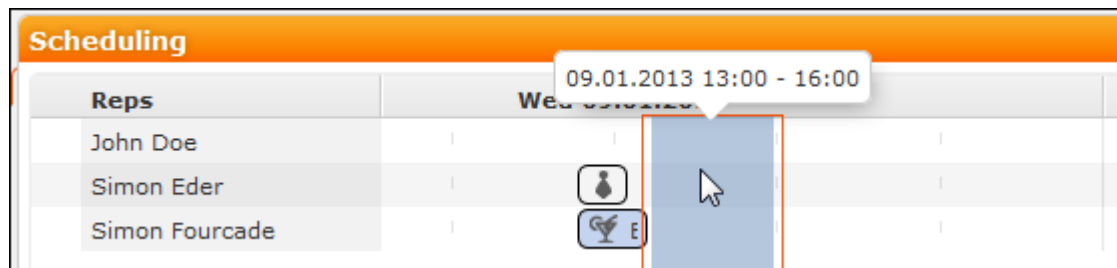
Note: Enable the check for conflicting appointments in the user settings, see Activities Tab. Conflicting appointments are only checked when adding activities from outside the calendar. Conflicting appointments are displayed next to one another in the calendar.

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.
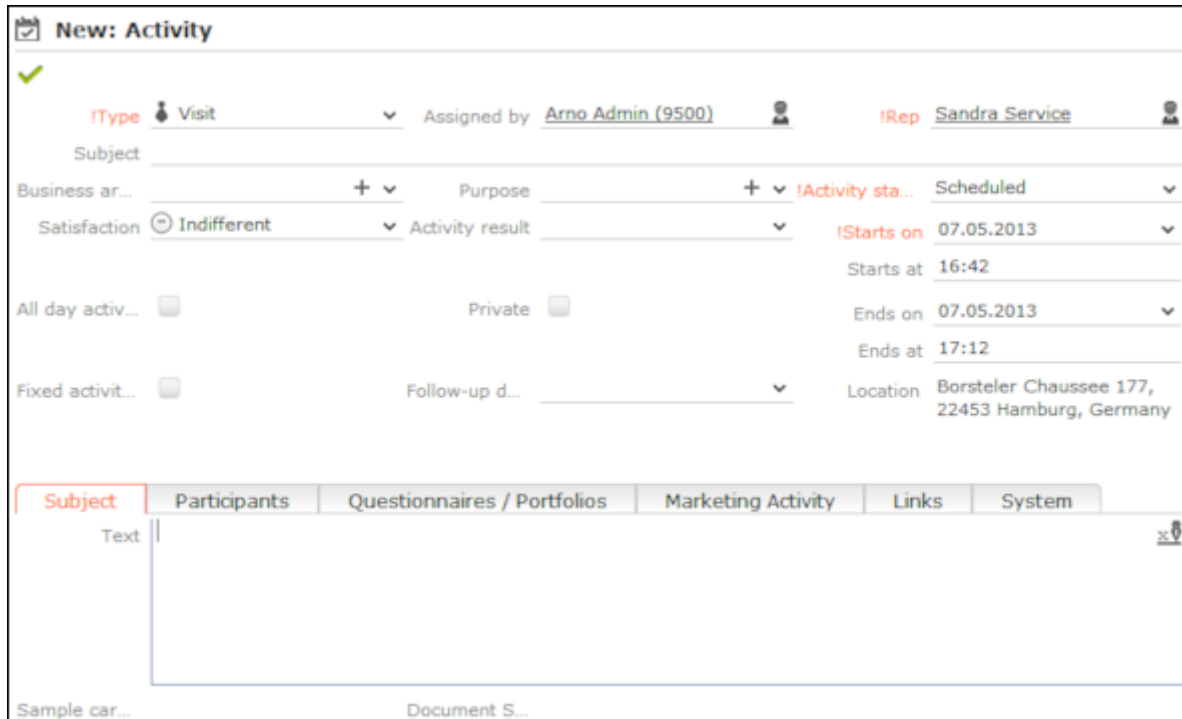
For information on recurring activities, see Recurring Activities on page 294.

For information on e-mails, see Activities and E-mails on page 299.

Adding Activities

To add an activity:

1. Select ![calendar icon] (**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.

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:
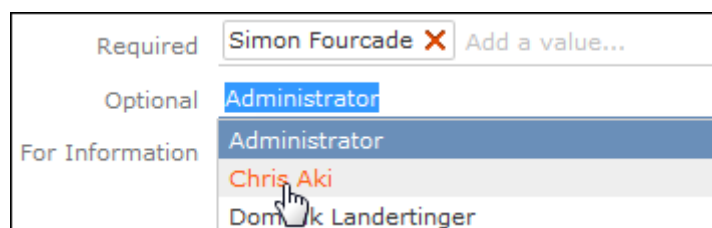
- Or click on **Add a value** and begin typing the name of the rep. Aurea CRM lists all matching reps.

- Click on 🛇 (**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.

Adding External Participants

You can add external participants to an activity under **Participants** below the record.

1. You can choose to add a company, person, a person linked to the current company or a record in your favorites.

2. Select the desired person or company.

The selected participants are displayed under **Participants** below the record.

The participation type is indicated with an icon:

- In the **T** (Type) column: 🛈 = Required, ❓ = Optional and 🛈 = For Information

- In the **S** (Status) column: ✓ = Accepted, ⊠ = Open, ✕ = Declined, ⬇ = Not relevant

The person or company for which the appointment was added is displayed as a link.

3. To change the participation type and status, select the options available under **Participation Type** or **Participation Status** in the participant's context menu.

4. Save the record.

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.

3. Determine the whether the activities should recur on a **Daily**, **Weekly**, **Monthly** or **Yearly** basis.

4. Depending on your settings, you can determine when the activity is repeated:

   • **Daily**: The number of days before the activity is repeated.

   • **Weekly**: The number of weeks before the activity is repeated and the day of the week. You can select multiple weekdays.

   • **Monthly**: The number of months before the activity is repeated; the day of the month; the day of the week.

   • **Yearly**: The number of years before the activity is repeated; the day and month; the day of the week.

   When repeating activities on a monthly or yearly basis, enable **Do not create substitute activities** to prevent activities that would fall on a holiday or weekend from being moved to the next work day.

5. Enable the **Weekends** and **Holidays** options if activities should also be added on holidays or weekends.

6. Define the **Series duration**:

   • **Ends after**: The number of recurring appointments after which the series ends.

   • **Ends on**: Date on which the series should end.

7. Save the data. The activities are generated. Recurring activities are indicated using the ↻ icon.

Note: The following fields are **not** transferred from the main activity to subsequent activities: **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 .

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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

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:

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.

Adding Activities

To add an activity:

1. Select ![icon](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.

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 👤 (**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.

Adding External Participants

You can add external participants to an activity under **Participants** below the record.

1. You can choose to add a company, person, a person linked to the current company or a record in your favorites.

2. Select the desired person or company.

   The selected participants are displayed under **Participants** below the record.

   The participation type is indicated with an icon:

   • In the **T** (Type) column: ⬤ = Required, ❓ = Optional and ⓘ = For Information

   • In the **S** (Status) column: ✔ = Accepted, ⧗ = Open, ✖ = Declined, ⬇ = Not relevant

   The person or company for which the appointment was added is displayed as a link.

3. To change the participation type and status, select the options available under **Participation Type** or **Participation Status** in the participant's context menu.

4. Save the record.

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.

3. Determine the whether the activities should recur on a **Daily**, **Weekly**, **Monthly** or **Yearly** basis.

4. Depending on your settings, you can determine when the activity is repeated:

   • **Daily**: The number of days before the activity is repeated.

   • **Weekly**: The number of weeks before the activity is repeated and the day of the week. You can select multiple weekdays.

   • **Monthly**: The number of months before the activity is repeated; the day of the month; the day of the week.

   • **Yearly**: The number of years before the activity is repeated; the day and month; the day of the week.

   When repeating activities on a monthly or yearly basis, enable **Do not create substitute activities** to prevent activities that would fall on a holiday or weekend from being moved to the next work day.

5. Enable the **Weekends** and **Holidays** options if activities should also be added on holidays or weekends.

6. Define the **Series duration**:

   • **Ends after**: The number of recurring appointments after which the series ends.

   • **Ends on**: Date on which the series should end.

7. Save the data. The activities are generated. Recurring activities are indicated using the ⟳ icon.

Note: The following fields are **not** transferred from the main activity to subsequent activities: **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.

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.

3. Determine the whether the activities should recur on a **Daily**, **Weekly**, **Monthly** or **Yearly** basis.

4. Depending on your settings, you can determine when the activity is repeated:

   • **Daily**: The number of days before the activity is repeated.

   • **Weekly**: The number of weeks before the activity is repeated and the day of the week. You can select multiple weekdays.

- **Monthly**: The number of months before the activity is repeated; the day of the month; the day of the week.
- **Yearly**: The number of years before the activity is repeated; the day and month; the day of the week.

When repeating activities on a monthly or yearly basis, enable **Do not create substitute activities** to prevent activities that would fall on a holiday or weekend from being moved to the next work day.

5. Enable the **Weekends** and **Holidays** options if activities should also be added on holidays or weekends.

6. Define the **Series duration**:

- **Ends after**: The number of recurring appointments after which the series ends.
- **Ends on**: Date on which the series should end.

7. Save the data.

The activities are generated. Recurring activities are indicated using the ↻ icon.

Note: The following fields are **not** transferred from the main activity to subsequent activities: **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:

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:

2. Enable the check boxes next to the persons you wish to notify under **Recipients**.

3. You can add additional recipients to the **Additional internal recipients** and **Additional external recipients** fields.

4. The contents of the **Subject** and **Text** fields in the activity are transferred to the e-mail, but you can still edit them in the e-mail.

5. Use the following check boxes to carry out the corresponding action: **Insert Aurea CRM web link, Insert Aurea CRM win link**, **Request a delivery receipt**, **Request a read receipt**. Your administrator is responsible for defining which options are available.

6. If your administrator has enabled the corresponding option, click on **Insert Signature** to insert your e-mail signature.

7. The documents linked to the activity are added as attachments.

Note: Your administrator can determine that certain types of files or files exceeding a certain size are not sent.When sending e-mails from your e-mail client, no attachments can be added.

---

8. Click on **Send** to send the e-mail.

Tasks

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.
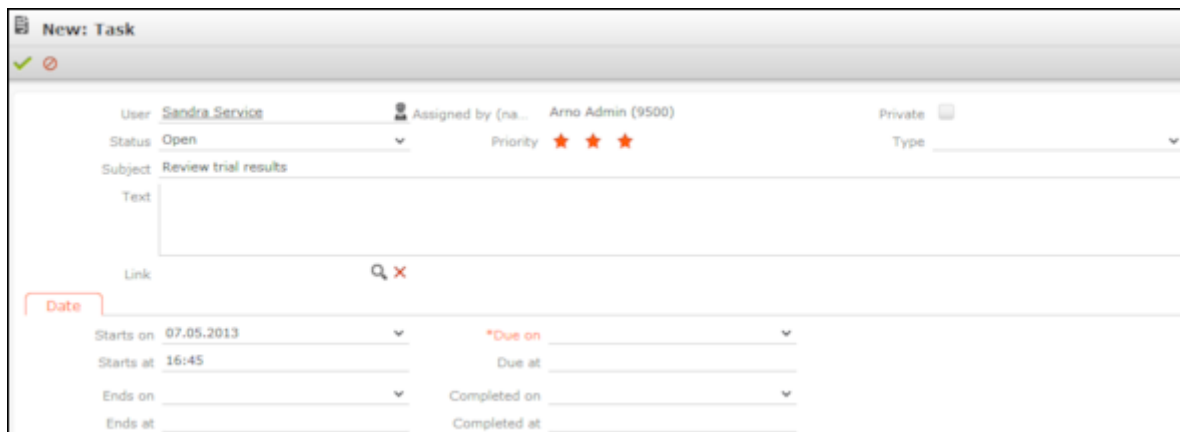
In order to organize complex tasks, you can:

- 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 ![icon] (**Daily business**) > **New Task**.

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

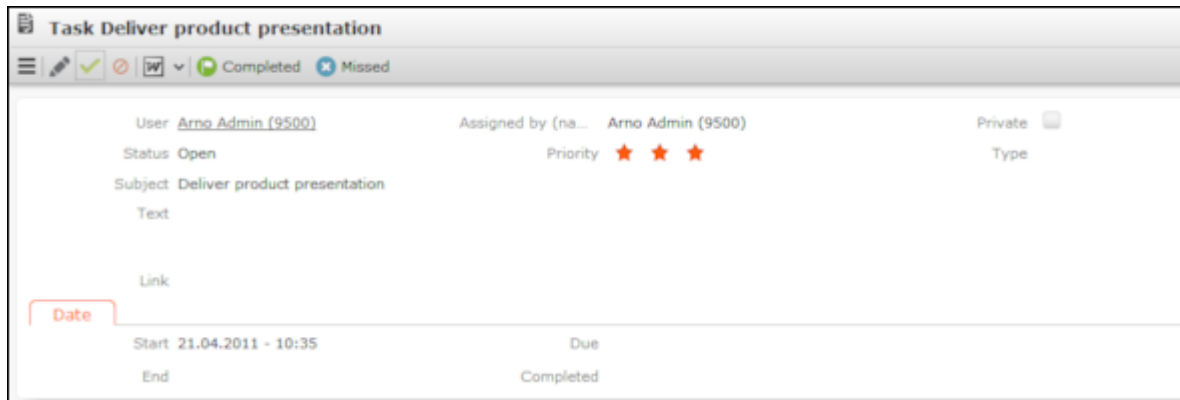You can use filters in the task search to restrict the search to those tasks assigned to you or to your open tasks:
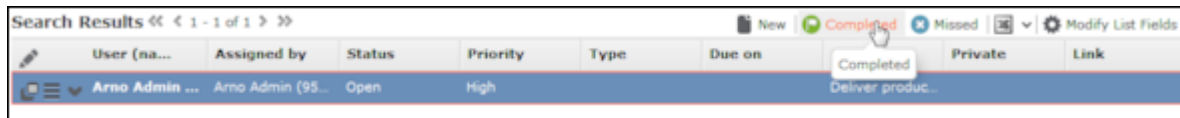
1. Select ![icon] (**Daily business**) > **Tasks**.

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:

Or select the task in the search results and click on **Completed** or **Missed** in the header:

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**.

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**.

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:

Or select the task in the search results and click on **Completed** or **Missed** in the header:

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 ⊕ (**New**).

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 ⊕ (**New**).

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:

1. Select ![icon](Daily business) > **Daily & Weekly Planning**. Or click on ![icon] (**Daily & Weekly Planning**) in the calendar. The search area and calendar are displayed.

2. You can define default values for certain values under **Activity Defaults** in the sidebar. These values are automatically transferred to activities you add in the daily & weekly planning area.

   These default values are only valid as long as you are in the daily & weekly planning area. If you switch to another info area and then reopen the daily & weekly planning area, the default values are reset.

3. Select the type of record you wish to add activities for in the drop-down list in the header:
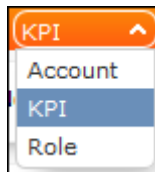
   Note: By default, you can search for accounts, roles (i.e. persons assigned a role at an account) and KPI. Your administrator can configure additional search options, see DayWeekPlanning in the Aurea CRM web Administrator Guide.

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.

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 ![icon] (**Daily Business**) > **Resources**.
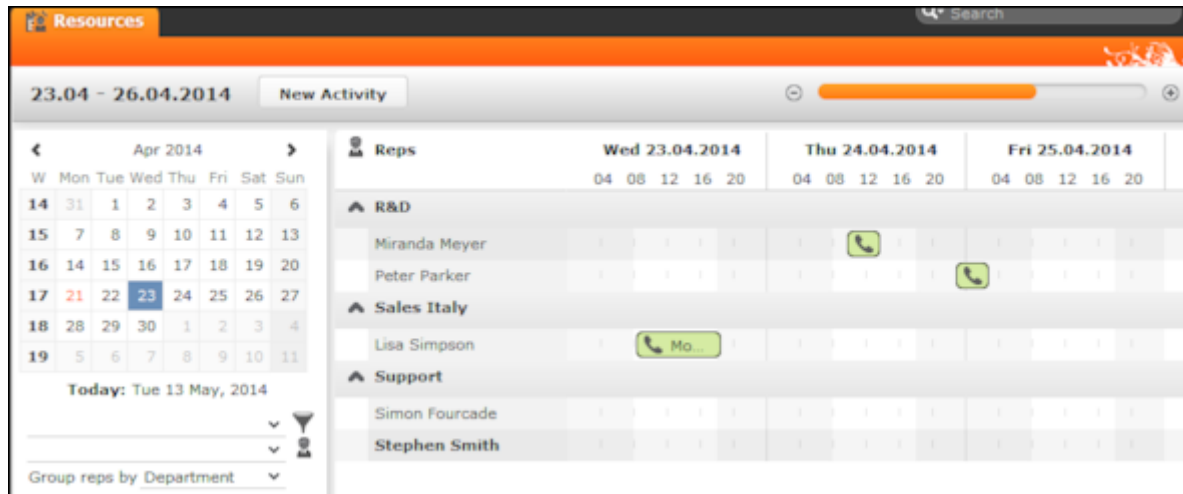
The current date and time is indicated by a vertical line. Holidays are color-coded.

You can customize the resource view, see Daily and Weekly Planning.

You can edit the displayed activities and absences and add new ones, see *Editing Activities and Absences*.

Customizing the Resource View

You can customize the resource view as follows:

• Display the sidebar if it is currently hidden by clicking on the arrow:

• To configure the time period that is displayed:
  • Click on the desired day or start of the time period in the small calendar in the sidebar.
  • Select the time period that is displayed using the slider in the header or by clicking on the + and minus icons:

  • Click on the header and drag it left or right to scroll:

- 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 ⚙ (**Edit Settings**):
  - Select the **Color Coding** criteria used to color activities. Click on ❷ (**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.

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): 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 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.
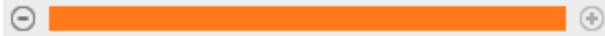
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You can customize the resource view as follows:

• Display the sidebar if it is currently hidden by clicking on the arrow:

- To configure the time period that is displayed:

  - Click on the desired day or start of the time period in the small calendar in the sidebar.

  - Select the time period that is displayed using the slider in the header or by clicking on the + and minus icons:

  - Click on the header and drag it left or right to scroll:

- 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 ⚙ (**Edit Settings**):

  - Select the **Color Coding** criteria used to color activities. Click on ❷ (**Legend**) to display an overview of the color-coding in the calendar.

  - Determine whether you wish to **Show working hours only**.

  - Enable the **Show group column** option to display reps' groups in a separate column.

  - Enable the **Show hidden items** option to include those appointments whose duration is less than the minimum duration for the selected view. These appointments are only displayed for reference and cannot be edited in the resource view.

👤 Reps		CW 18/Apr 2014						
		28	29	30	1	2	3	4
▲ **R&D**								
Miranda Meyer								
Peter Parker								
▲ **Sales Italy**								
Lisa Simpson				⚭	○			
▲ **Support**								
Simon Fourcade								
Stephen Smith								

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

Editing Activities

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): 📞 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 🔒 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**.

2. Your routes are listed under **Search Route**.

   Click on ⊕ (**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.

---

4. 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.
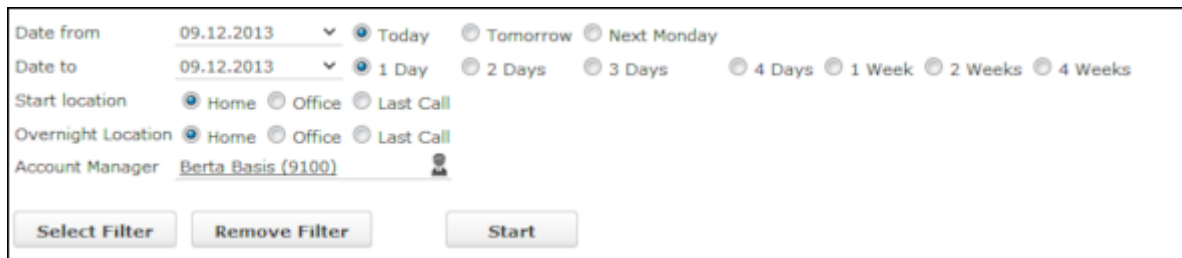
Call Planning

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 ![icon] (**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:
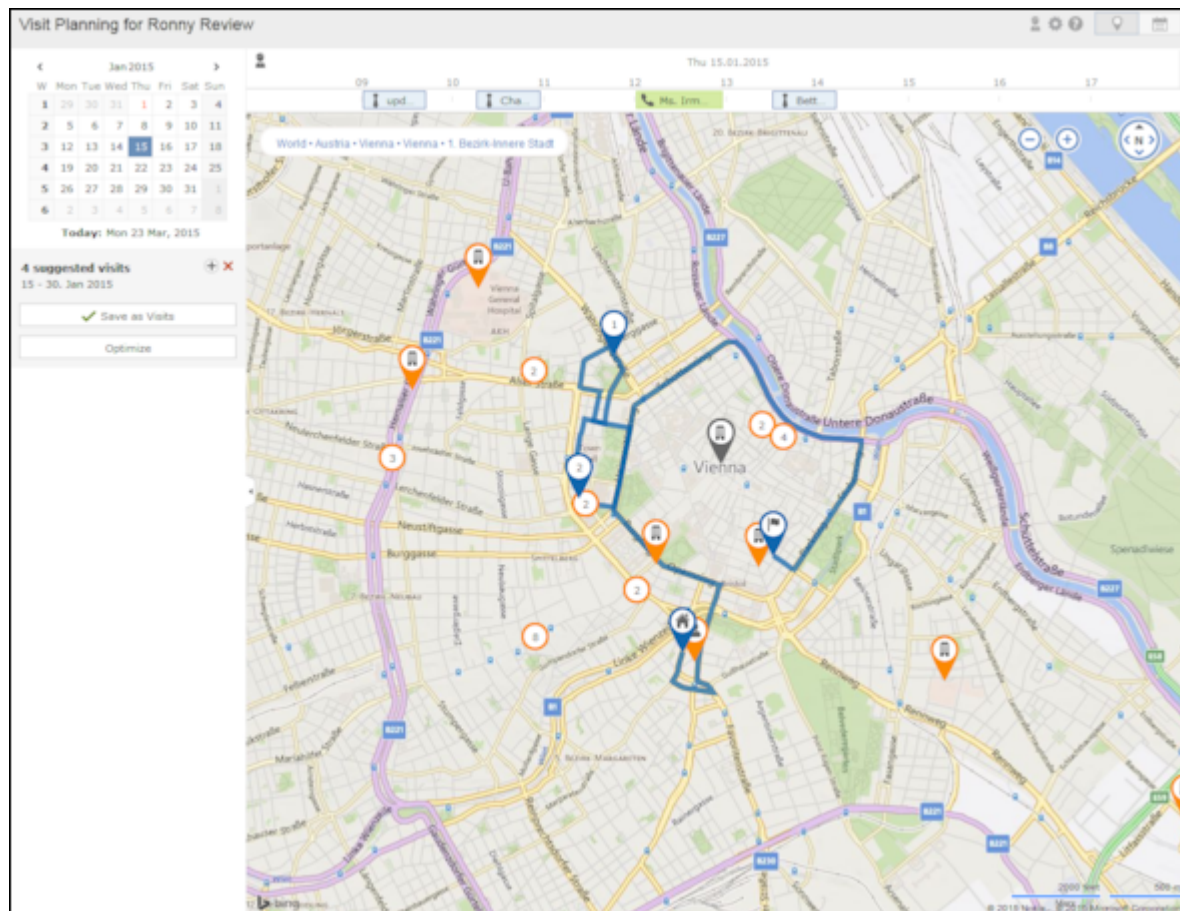
Map

* The location of your customers on the map are color-coded:

  * Orange: The location of your customers (companies and persons).

  * Orange circle with number (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 ( ): 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 ( ).

- Click on a pin or a customer in the list if multiple customers are grouped at the same location. Information on the customer and the activity/suggestion is displayed below the mini calendar. The activity/suggestion is highlighted in the timeline (if it exists).

- Click on a location on the map or click on ≡ (**Show Menu**) in the list of customers at a location to open the context menu. Select **Add to Route** or **Remove from Route** to add the customer to the route or remove them from it. Select **Edit** to edit the corresponding visit suggestion.

Note: If you add a customer to a route or remove a customer, the start and end time of existing suggestions are not updated. Click on **Optimize** to recalculate the route.

- Messages, e.g. concerning long idle times, exceeded travel times, conflicting appointments and appointments outside of work hours or on holidays are displayed and highlighted with an icon according to severity ((information), (warning), (error)). These messages are either displayed on the route between two locations, or at the starting location if the message applies to the starting location. Click on an icon to display the message. The record the message applies to is highlighted in the timeline.

Sidebar

- Use to display or hide the sidebar.
- Select a date in the mini calendar to display the route on the selected date or to plan a route on that date.
- To generate visit suggestions:

  1. Click on ⊕ (**New Suggestions**) below the calendar. A window is opened where you can define the settings used to generate the suggested route.

2. Choose where to start the route from (Home, Office, Last Visit) and the start and end date (by default, the start and end date are the same). If the route spans several days, determine where the route should start from on the subsequent days (Last Visit starts the next day from the location of the last visit on the previous day).

3. Click on **Create Suggested Route**. The route is created (any existing visit suggestions are deleted) and is displayed on the map. You can now edit the route (e.g. add customers).


Note: Calculating the route may take a while. By default, the route is created for you. To generate a route for another rep, click on ⛊ (**Select Rep**) in the header and select the desired rep. The selected rep is remembered and reused the next time you access the visit planning area. If you apply a filter (⚙ (**Settings**) in the header), the filter is taken into account when generating visit suggestions. If you add or reschedule an activity outside of the rep's work hours, the rep's work hours for that day are extended accordingly. Routes can span 31 days at most.

• Click on **Optimize** to optimize the route if you have edited it or added the route manually. The route is recalculated. The order of visits in the route may change. Existing activities and the starting location are not changed.

Note: Calculating the route may take a while. A message is displayed if the route is already optimized or cannot be optimized further.

• Once you are satisfied with the route, click on **Save as Visits**. Activities are automatically generated (type = "Visit") based on the suggestions in the route.

   If you are planning a route over several days, you can choose whether to generate activities for all the suggestions or only for a specific day.

• Click on ✖ (**Discard all Suggestions**) in the sidebar next to the number of suggested visits. **All** visit suggestions are deleted (not just those on the current day).

• Click on a location on the map or on an activity/suggestion in the timeline to display information on the record in the sidebar.

   Move your mouse cursor over the record's header (e.g. the name of the customer) to display the icons used to access the menu (≡) and quick view (⊡). Select **Remove from Route** from the menu to remove the customer from the route.
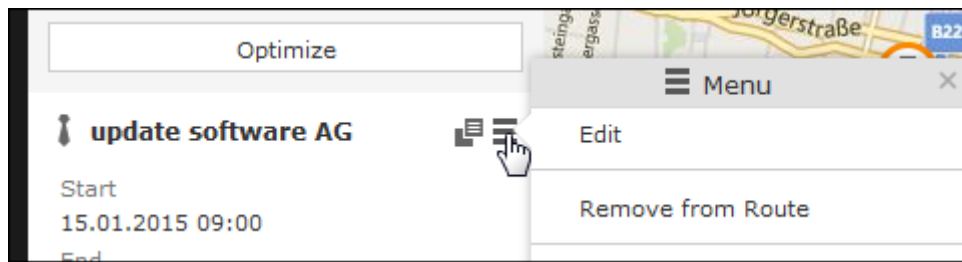
Timeline

- A timeline is displayed above the map containing suggestions that are currently part of the route (blue) or not part of the route (violet). Existing activities and absences are colored the same as they are in the calendar.

- Visit suggestions are indicated by the ⬇ icon in both the timeline and sidebar. Existing activities and absences are indicated using the same icon as in the calendar (e.g. ⬇ for a visit).

- Click on an activity or visit suggestion to highlight the customer on the map with a circle beneath the pin (📍).

- You can reschedule activities and suggestions by dragging them to the desired time in the timeline. Drag the left or right borders to change the start and end time (and the duration).

- Double-click on an activity or visit suggestion to open a popup where you can edit its details.

Header

- The rep the route is being planned for is displayed in the header. By default, routes are created for you.

  Click on 👤 (**Select Rep**) to select a different rep. The selected user is stored and selected by default the next time you open the visit planning area.

- Click on 📍 (**Map**) and 📅 (**Calendar**) to switch between the map and calendar view of activities and suggestions. You can edit activities in the calendar view, e.g. move an appointment to reschedule it.

- Click on ❓ (**Legend**) to display the legend.

- Select ⚙ (**Settings**) > ▼ (**Filter**) to Determine which customers are displayed on the map (e.g. companies, persons) and define filters, see 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.

    3. 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 (![Au] > **Refresh Working Area**).

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 ![icon] (**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 ⊕ (**New**).

3. Click on **+** (**Add/Find Catalog Values**) next to the **Questionnaire** field. The **Find or Add Catalog Value** window opens.

4. Enter a name for the questionnaire.

5. Click on **New**.

6. Save the record.

7. Define the questions and answers, see Defining Questions on page 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.

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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.

- 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.
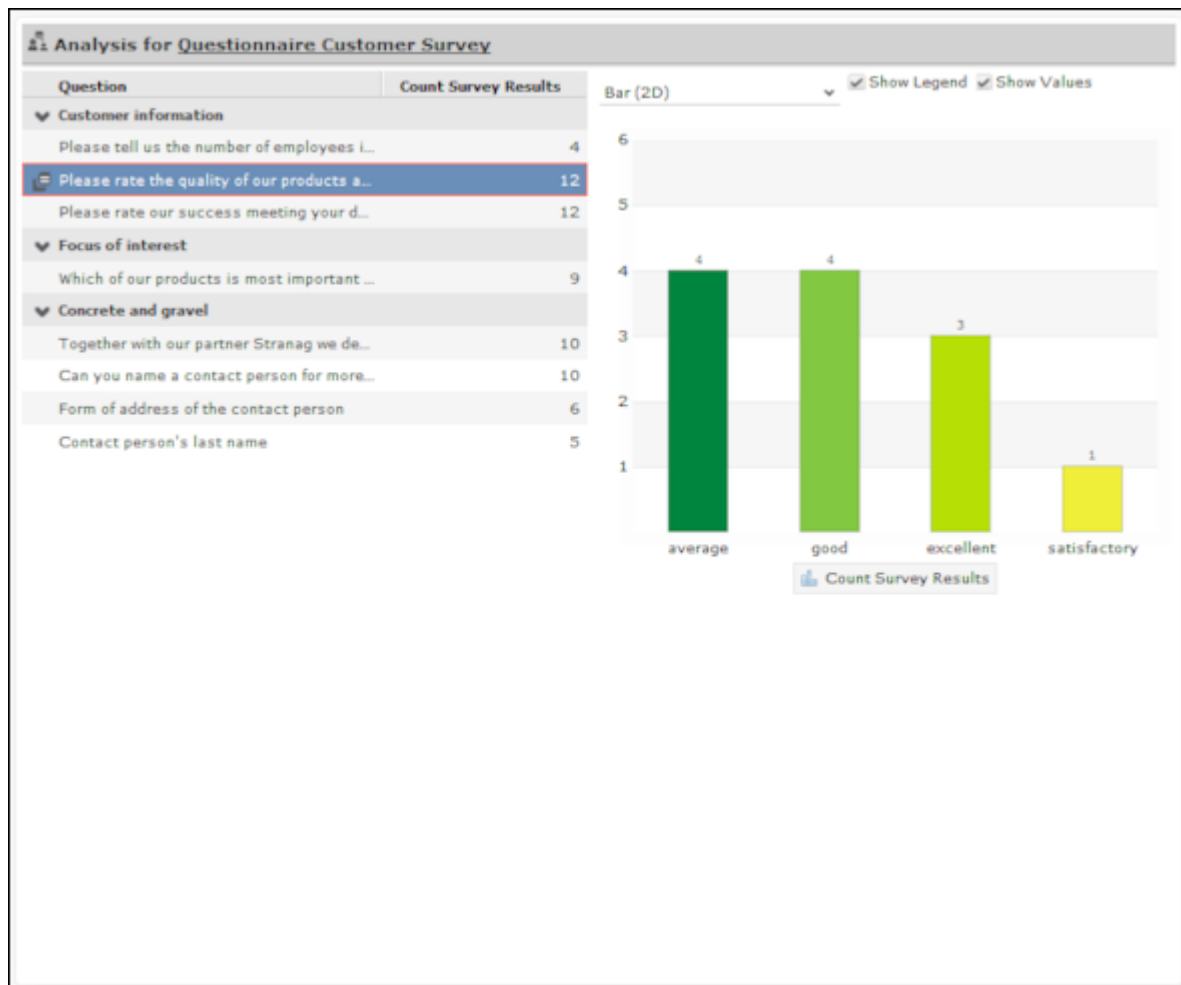
- The answers given to individual questions are displayed on the right (selected answers graphically, answers entered as text in a list).

- 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 ![icon] (**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 🔍 (**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 ![icon](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**.

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.

3. Enter data used to search for the document(s) later, e.g. the **Document Class**.

4. 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 ![icon](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 🔍 (**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 [icon] (**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 🔍 (**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 ✖ (**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.

Displaying Checked Out Documents

To display the documents you have checked out:

1. Select [icon] (**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 🔍 (**Select**) next to the **File** field to upload the document manually.

    • **Undo Check Out**

If you log out of Aurea CRM web and you have checked out documents, you are asked whether you want to:

• Cancel logging out in order to upload the document

• Upload the document the next time you use the system. The document remains checked out.

• Undo the check out before logging off.

Saving Documents in the Database

Note: If your administrator has determined that you can upload multiple documents at once (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 [icon] (**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**.

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.

3. Enter data used to search for the document(s) later, e.g. the **Document Class**.

4. 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 🔍 (**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 ![icon](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 🔍 (**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 ✖ (**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.

2. Switch to the **Document Links** tab. The documents available in Aurea CRM are listed.

   You can identify mass mailings as documents that were created by a **Marketing Activity**. The **Serial Letter** and **Read only** check boxes are automatically enabled.

3. Click on the title of the document or select **Check Out & Edit** from the context menu. The document is opens in Microsoft Word.

Document Templates

Learn to create and manage document templates.

Using Aurea CRM Addin for Microsoft Word

Aurea CRM add-in for Microsoft Word allows CRM users to create documents based on templates that meet the corporate customer interaction (CI) guidelines and enrich the documents with content from the CRM.

CRM administrator and users can create template documents that can be used for various recurring tasks. Some of the tasks for different user roles include the following:

- A Sales representative could create and maintain template documents for offer letters, order sheets, e-mail etc. Use the different information in the CRM system to enrich the document.

- Marketing personnel could create new templates to meet the latest customer interaction guidelines. Create templates for marketing campaigns sent by letters or flyers using information from the CRM.

- Service representatives can create solution documents or other documents for different services and use the CRM information in those documents.

- Field service representatives can create service report documents at the customer site along with the current ticket.

- All users can ensure that customers receive information in their preferred language.

Note: To send email in a language other than the default languages, you should use UTF-16 encoding for the template documents. For example, to send a mail in Cyrillic, encode the HTML template document in UTF-16.

The Aurea CRM word Add-in supports the following features:

- Allows you to use the same set of methods used by Aurea CRM web.

- Template documents can use fields that are used to store information in Aurea CRM.

- You can generate the documents on CRM.pad using the same templates from Aurea CRM.

- Serial and single letter fields can be easily integrated into the templates using drag and drop features.

- You can create template documents in multiple languages.

- You can create formatted text, when merging documents and mail merge.

- Allows you to embed additional information in the documents like images and pictograms.

Installing Aurea CRM Add-in for Microsoft Word

The recommended way to install Aurea CRM Word Add-in is to use a network shared location containing the latest installation package. Ask your CRM administrator for the central shared location for the CRM Add-in for Word installation package. Using this process ensures that the latest version of the CRM Add-in for Word is automatically upgraded to the latest version. You only have to install it once using the shared central location.

If your organization does not provide a shared location, the Aurea CRM add-in for Word installation package can be found on the Aurea CRM customer support site.

To install the Aurea CRM add-in for Word:

1. Browse to the network shared central location provided by your CRM administrator.

   Or

Unzip the package `OfficeAddins_<versionNo>_full.zip`. The `<versionNo>` is the latest version available on the customer support site.

2. Double click `aurea.office.word.vsto` file in the shared location or the unzipped folder. The Microsoft Office Customization Installer window opens.

The installer verifies the publisher, in this case Aurea CRM, and then displays the following window.

3. Click **Install**. The Installing Office Customization message displays.

4. The window automatically closes on successful installation.

5. Start Microsoft Word and open a blank document, the **Aurea CRM** menu item should be visible.

6. Click the **Aurea CRM** menu.

7. To work with the plugin you have to be connected to Aurea CRM. Click **Settings** to open the connection dialog.

8. Enter the following details in the connection dialog:

    a. Enter the URL of the Aurea CRM server.

    b. If Aurea CRM web is deployed on a RAS server, perform the following steps:

        a. Select the Use RAS authentication checkbox.

        b. Click Open RAS Advanced Settings. The following RAS settings dialog

        displays.

        c. Enter the URL for the RAS server and the Application ID of Aurea CRM web instance on the RAS server.

        d. Click Close RAS advanced settings.

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.
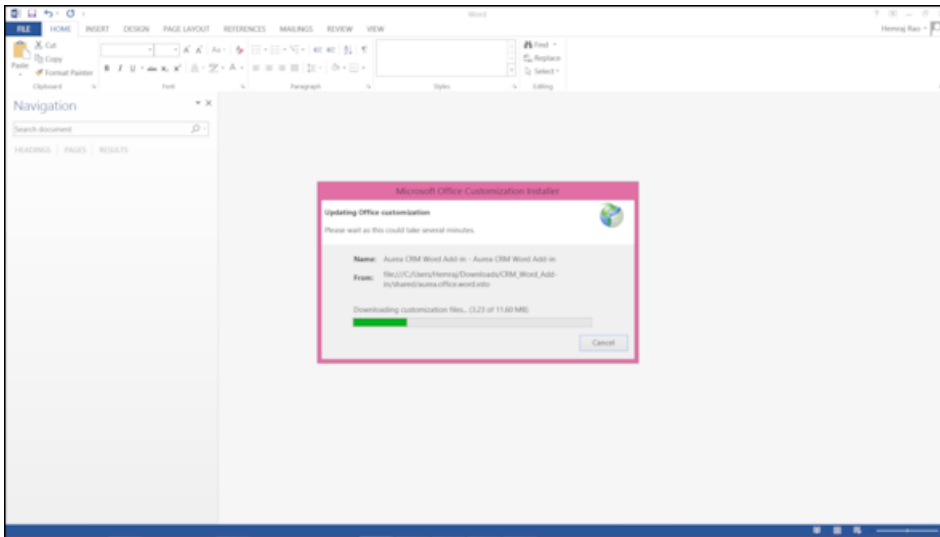
If you have installed the word plugin using the installer package from the support site, then you have to uninstall the existing Aurea CRM Word Add-in from **Control Panel > Programs > Programs and Features**.
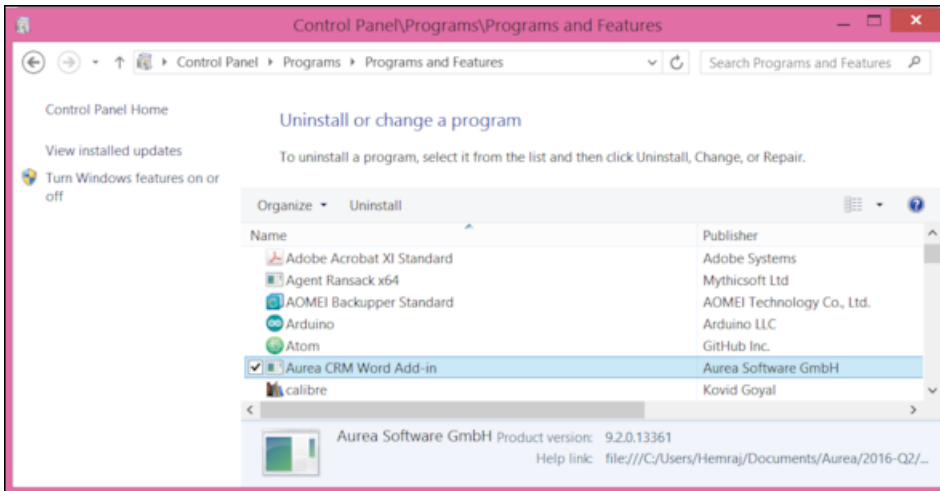
Unzip the package `OfficeAddins_<version no>_release.zip`. The `<version no>` is the latest version available on the customer support site. Follow the installation instructions in Installing Aurea CRM Add-in for Microsoft Word.

Creating and Saving new Document Template

You can create document templates for documents that you regularly use for recurring tasks.

To create a new document template:

1. Open a Microsoft Word document containing basic text.

2. Edit the content of the document.

3. Click on the **Aurea CRM** menu item.

4. Click **Settings** to open the connection dialog.

5. Enter the following details in the connection dialog:

   a. Enter the URL of the 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)**

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:

9. Click **Insert Mail Merge Fields**, to update the document with information from the records on Aurea CRM server. The **Mail Merge Fields** column displays.

10. Click **Queries ( )** to list existing queries.

11. You can create a new query by selecting an existing query then modifying, and saving it.

To create a new query, perform the following:

a. Select any query or record and click ✓ . In the following screenshot, typing **com** in the filters text box shows **companies 01**.

b. Right click on the root record node and select **Remove**.

This 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.

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.

You can type in the text box to filter for a specific document. You can also select the name of the template document. In the screenshot above, **Template (BASE)** was the document class selected and **invi** was typed in the filter text box, to find the **Template Invitation.docx** template.

4. The selected template document is retrieved from the Server and loaded into Microsoft Word. For example, the screenshot below shows the **Template Invitation.docx**.

5. You can edit the template document and make modifications. For example, in the Invitation template.docx, you might want to add the country name, after the City name.

6. Click Insert Mail Merge Fields. The Mail Merge Fields column displaying the fields from the selected infoarea is displayed to the right of the editing pane. See the screenshot below.

7. To add a field from the infoarea to the template document, select the field and drag and drop it in the document at the appropriate position. For example, the Country field was selected and added to the document. See the screenshot below.

8. Click **Save**. The template document is saved to the D1 area of Aurea CRM.

Mail Merge Using Document Templates

To generate a document for several persons using the document template:

1. From the Aurea CRM menu, login to the CRM server and open the Mail Merge template document. Edit the template document if necessary. For more information, see >> Opening and Editing document templates.

2. Click **Get Data From CRM**. The Select Records dialog displays single record or a list of records, showing the data fields you selected. You can then select the data you want use with the document template.

3. Click **Start Mail Merge**. The document is opened 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.

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.

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:

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 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 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 [Get Data From CRM] to execute Mail Merge again.

The resulting document is shown in the screenshot below.

Adding Tables to a Template Document

Aurea CRM add-in for Microsoft Word provides an Insert Table feature that allows you to create a hierarchical grouping of records.

For example, if you want to group all the employees of a company into separate documents, you have to use the **Insert Table** feature. If you have two companies and three employees in each company then a simple mail merge would create six pages containing the company name and one employee name. If you use the Insert Table feature then the result document contains two pages for the two companies and all the employees of a company 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.

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 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.

l. To format the table, go to the template document, right click the table and select Table Properties.

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.

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.
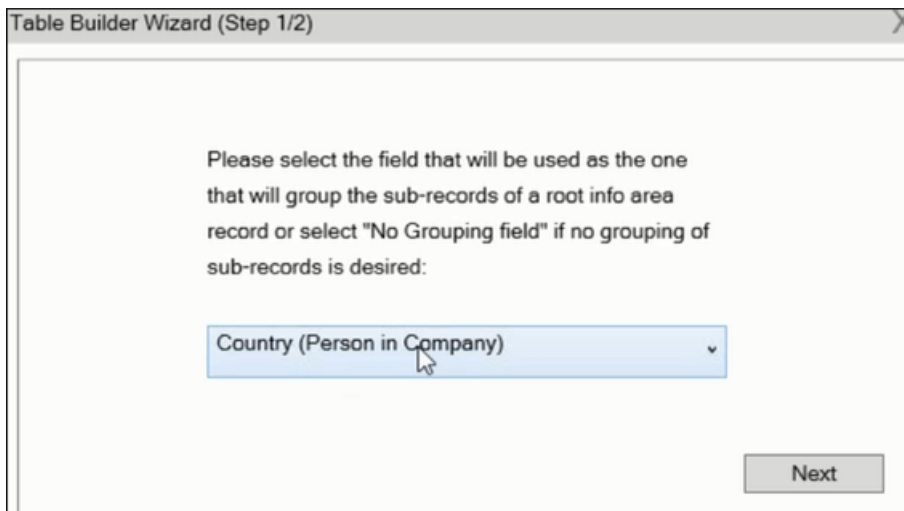

This completes the steps required to generate documents without using a grouping field.

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.

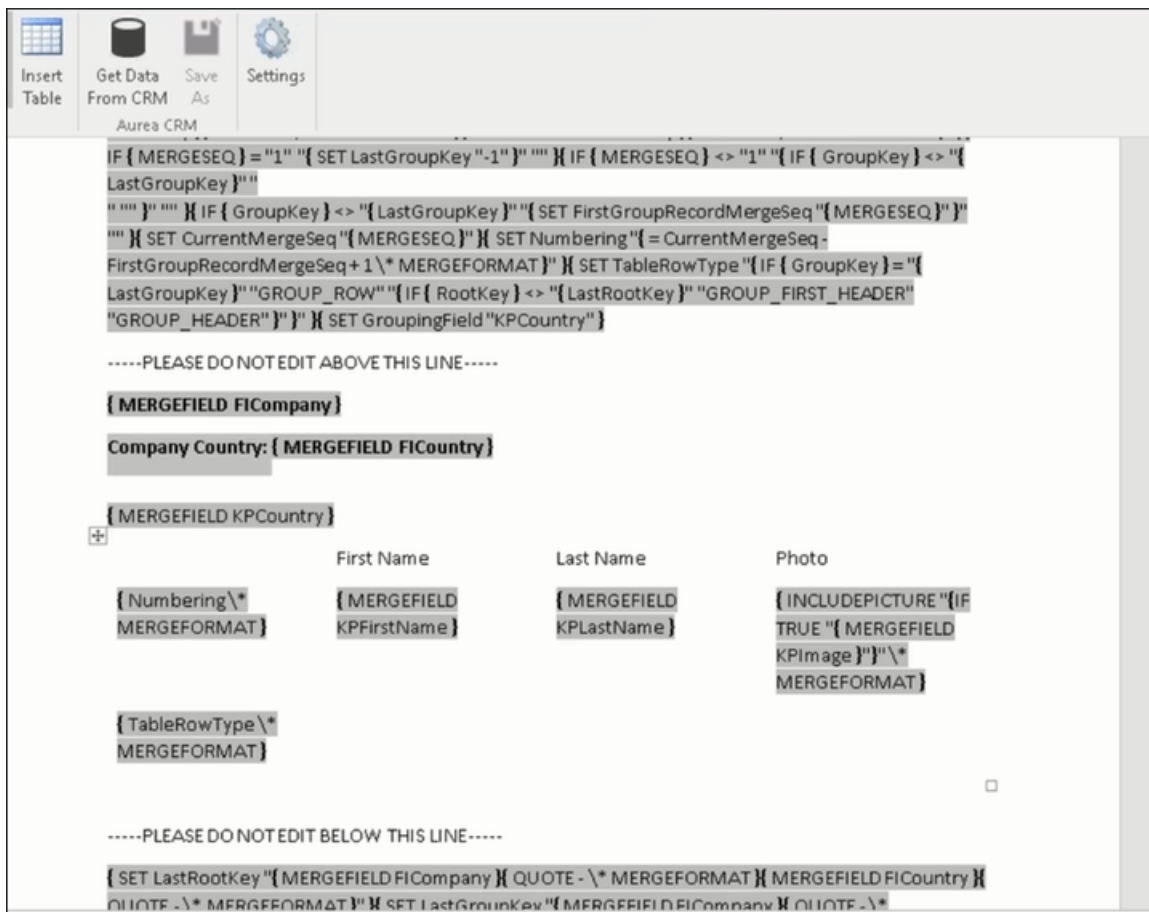b. Click **Next**. The **Table Builder Wizard (Step2/2)** dialog displays.

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.
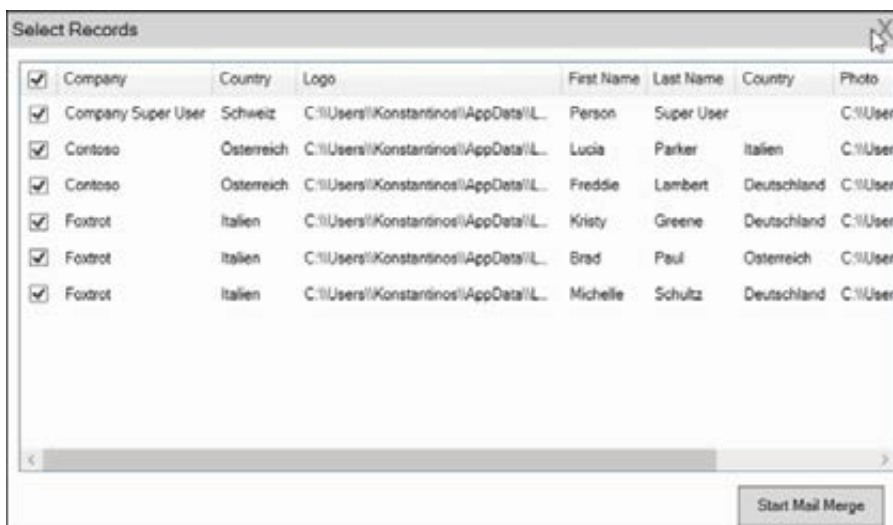
---

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.

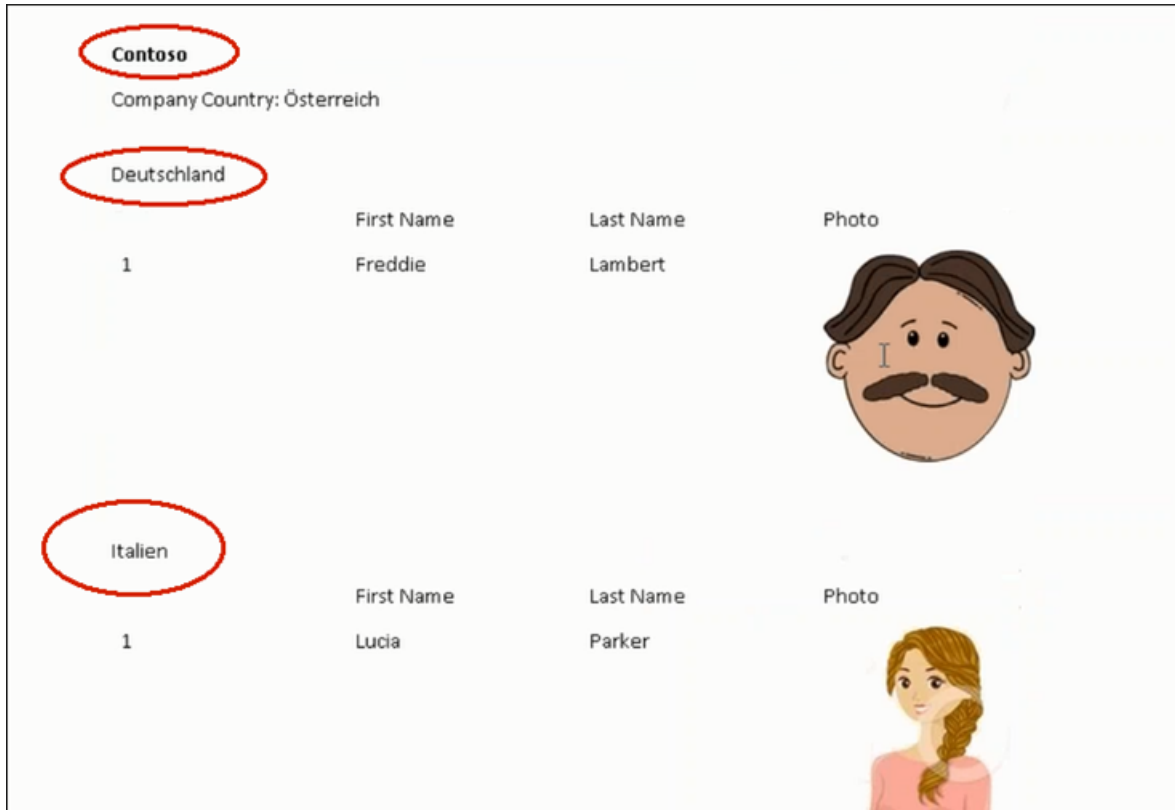d. Add the **Company name** and the **Company Country** records to the template document. See the screenshot below.

IF { MERGESEQ } = "1" "{ SET LastGroupKey "-1" }" "" }{ IF { MERGESEQ } <> "1" "{ IF { GroupKey } <> "{ LastGroupKey }""

" "" }" "" }{ IF { GroupKey } <> "{ LastGroupKey }" "{ SET FirstGroupRecordMergeSeq "{ MERGESEQ }" }" "" }{ SET CurrentMergeSeq "{ MERGESEQ }" }{ SET Numbering "{ = CurrentMergeSeq - FirstGroupRecordMergeSeq + 1 * MERGEFORMAT }" }{ SET TableRowType "{ IF { GroupKey } = "{ LastGroupKey }" "GROUP_ROW" "{ IF { RootKey } <> "{ LastRootKey }" "GROUP_FIRST_HEADER" "GROUP_HEADER" }" }" }{ SET GroupingField "KPCountry" }

-----PLEASE DO NOT EDIT ABOVE THIS LINE-----

{ MERGEFIELD FICompany }

Company Country: { MERGEFIELD FICountry }

{ MERGEFIELD KPCountry }

	First Name	Last Name	Photo
{ Numbering * MERGEFORMAT }	{ MERGEFIELD KPFirstName }	{ MERGEFIELD KPLastName }	{ INCLUDEPICTURE "{ IF TRUE "{ MERGEFIELD KPImage }" }" * MERGEFORMAT }
{ TableRowType * MERGEFORMAT }			

-----PLEASE DO NOT EDIT BELOW THIS LINE-----

{ SET LastRootKey "{ MERGEFIELD FICompany }{ QUOTE - * MERGEFORMAT }{ MERGEFIELD FICountry }{ QUOTE - * MERGEFORMAT }" }{ SET LastGroupKey "{ MERGEFIELD FICompany }{ QUOTE - *

e. Click ![icon] 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.
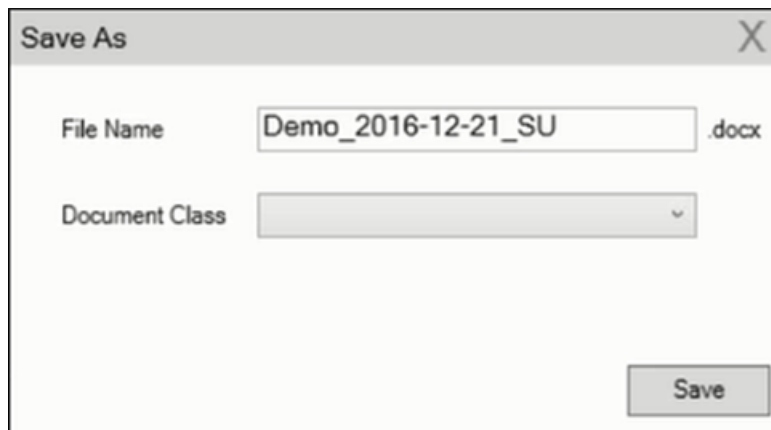

f. Click **Start Mail Merge** to generate the result document.

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.

6. Click **Save As** to save the template document. The **Save As** dialog displays.

A default name in the following format is automatically displayed, `<document-Name>_<date>_<user name>.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.

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- Field service representatives can create service report documents at the customer site along with the current ticket.

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   Or

   Unzip the package `OfficeAddins_<versionNo>_full.zip`. The `<versionNo>` is the latest version available on the customer support site.

2. Double click `aurea.office.word.vsto` file in the shared location or the unzipped folder. The Microsoft Office Customization Installer window opens.
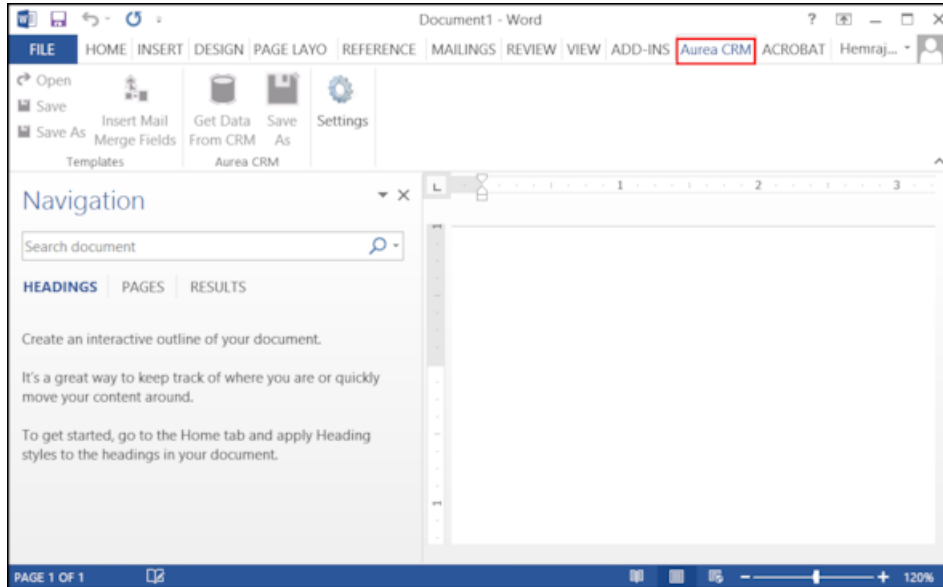

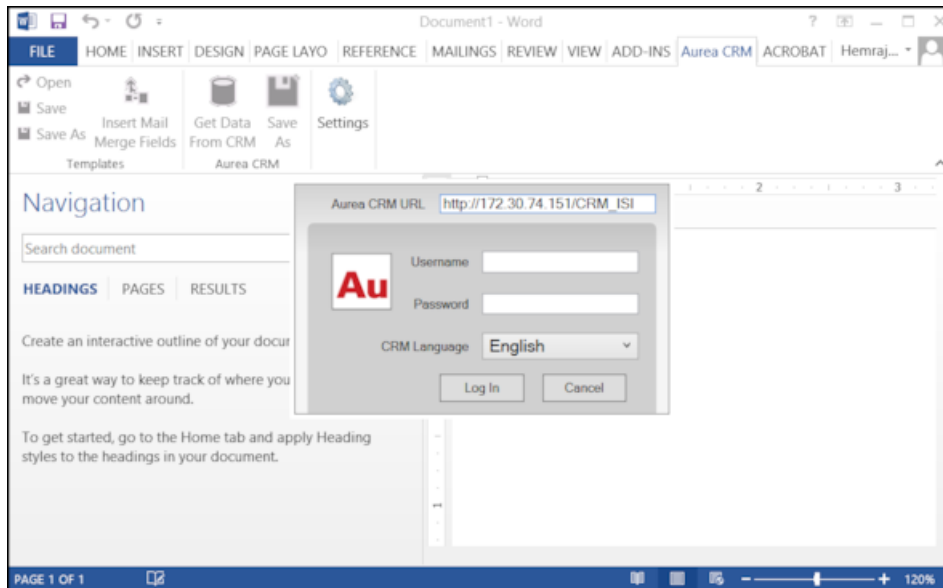   The installer verifies the publisher, in this case Aurea CRM, and then displays the following window.

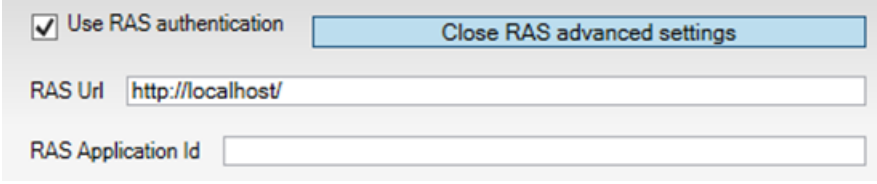**3.** Click **Install**. The Installing Office Customization message displays.

4. The window automatically closes on successful installation.

5. Start Microsoft Word and open a blank document, the **Aurea CRM** menu item should be visible.

6. Click the **Aurea CRM** menu.

7. To work with the plugin you have to be connected to Aurea CRM. Click **Settings** to open the connection dialog.

8. Enter the following details in the connection dialog:

   a. Enter the URL of the Aurea CRM server.

   b. If Aurea CRM web is deployed on a RAS server, perform the following steps:

      a. Select the Use RAS authentication checkbox.

      b. Click Open RAS Advanced Settings. The following RAS settings dialog displays.

c. Enter the URL for the RAS server and the Application ID of Aurea CRM web instance on the RAS server.

d. Click Close RAS advanced settings.

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.
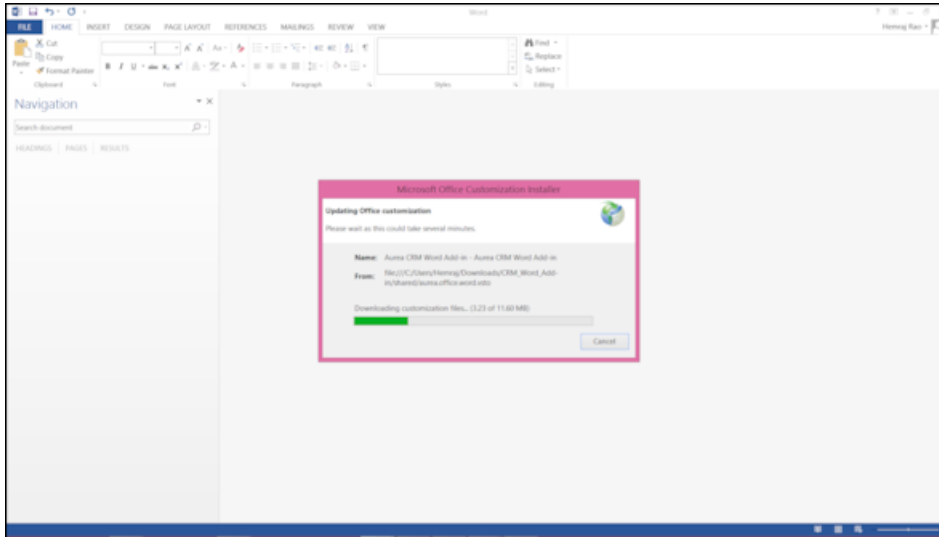
If you have installed the word plugin using the installer package from the support site, then you have to uninstall the existing Aurea CRM Word Add-in from **Control Panel > Programs > Programs and Features**.
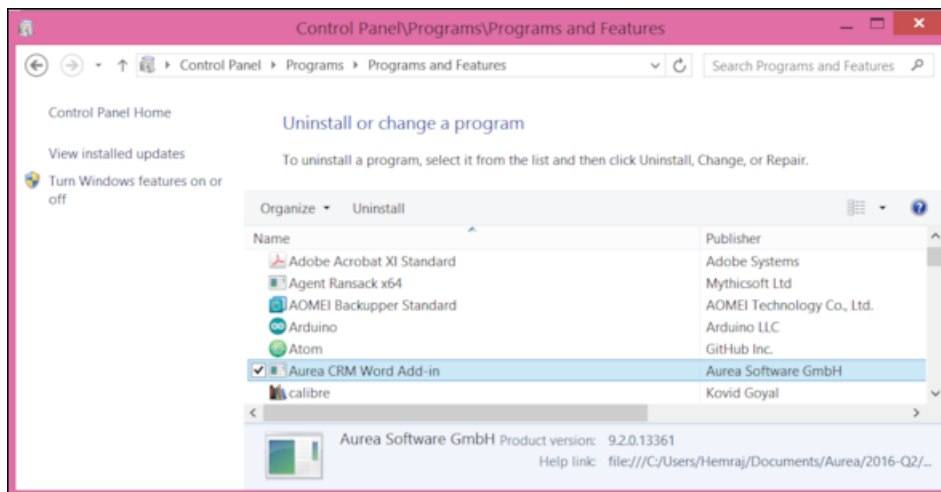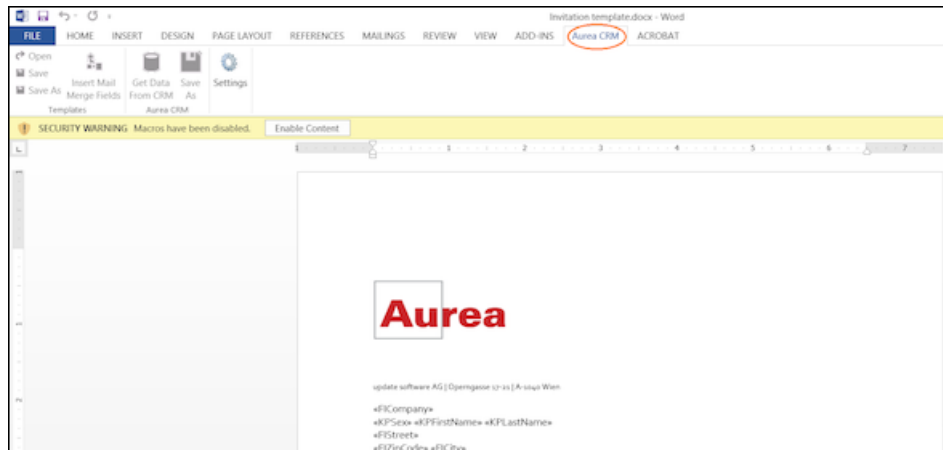

Unzip the package `OfficeAddins_<version no>_release.zip`. The `<version no>` will be the latest version available on the customer support site. Follow the installation instructions in Installing Aurea CRM Add-in for Microsoft Word.
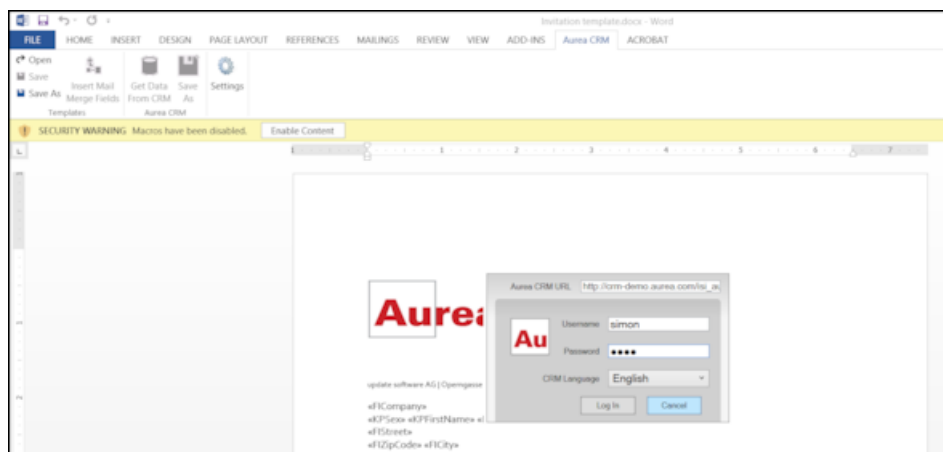
Creating and Saving new Document Template

You can create document templates for documents that you regularly use for recurring tasks.

To create a new document template:

1. Open a Microsoft Word document containing basic text.

2. Edit the content of the document.
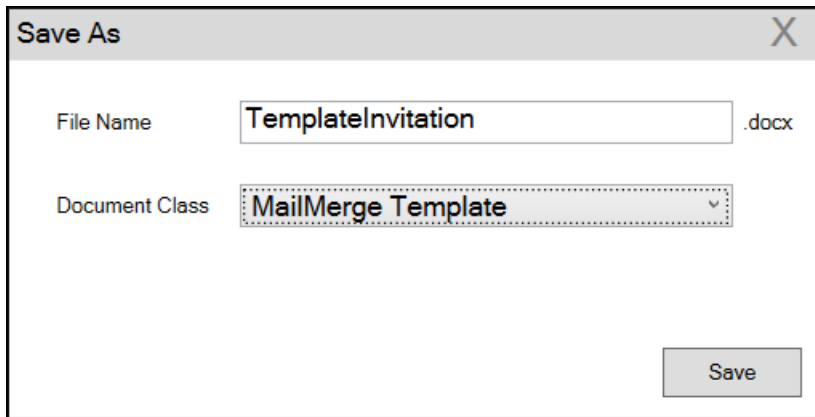
3. Click on the **Aurea CRM** menu item.

4. Click **Settings** to open the connection dialog.

5. Enter the following details in the connection dialog:

   a. Enter the URL of the 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:

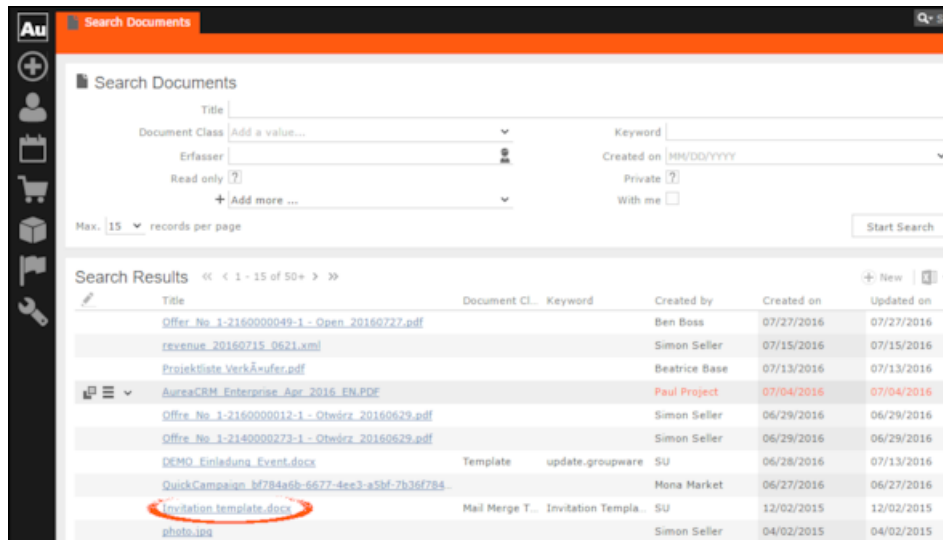   • **MailMerge Template**

      • **Template (BASE)**

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.
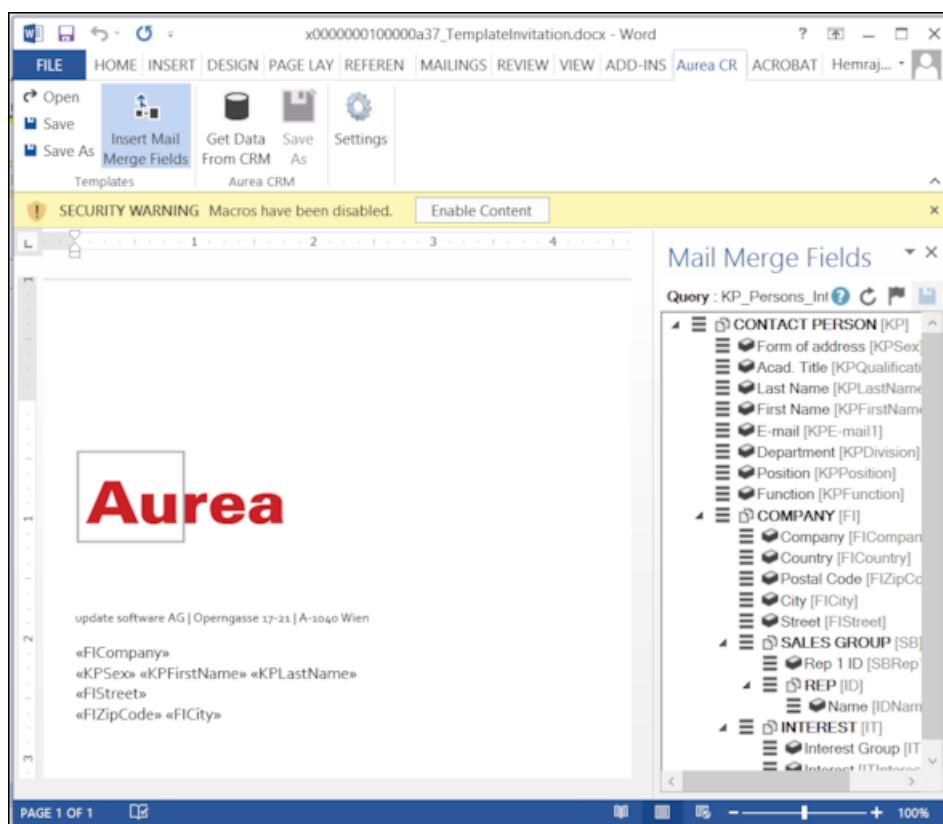
7. Click **Save**. The template document is saved to the D1 infoarea of the Aurea CRM server.

Note: After a template is saved to Aurea CRM, the **Insert Mail Merge Fields** menu item is activated.
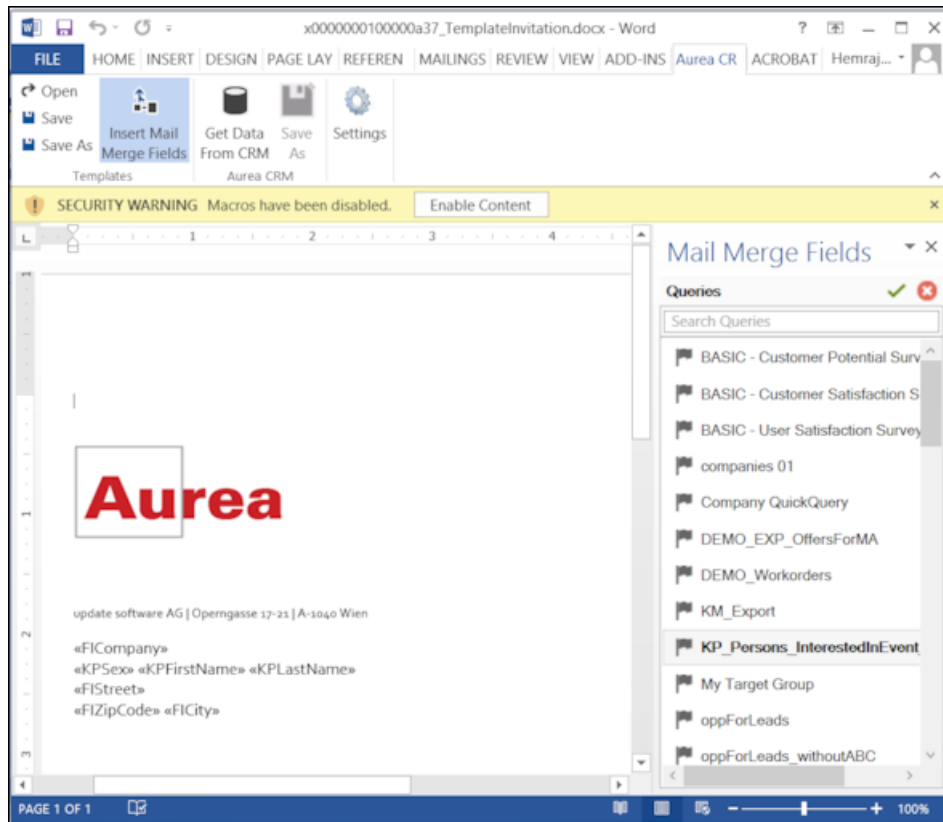
8. Login to the Aurea CRM server with the same username and password and search for the document. The saved document should be visible in the search list as shown in the screenshot below:

9. Click **Insert Mail Merge Fields**, to update the document with information from the records on Aurea CRM server. The **Mail Merge Fields** column displays.

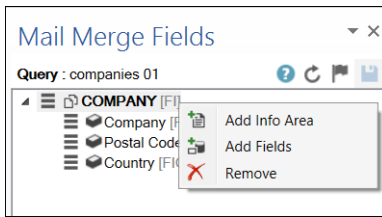10. Click **Queries ( )** to list existing queries.

11. You can create a new query by selecting an existing query then modifying, and saving it.

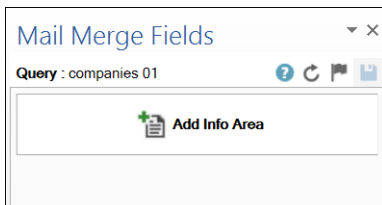   To create a new query, perform the following:

    a. Select any query or record and click ✓ . In the following screenshot, typing **com** in the filters text box shows **companies 01**.
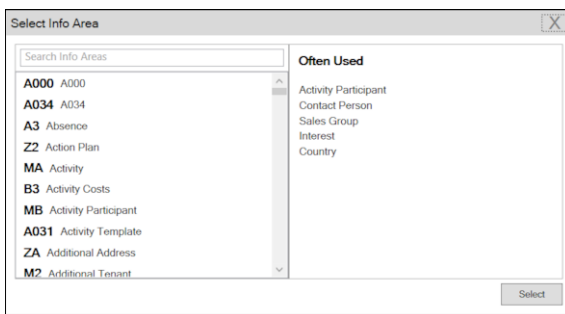

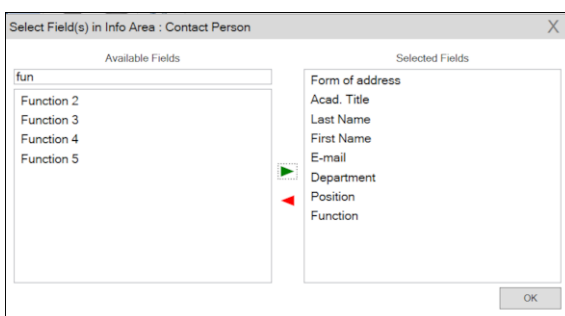   b. Right click on the root record node and select **Remove**.

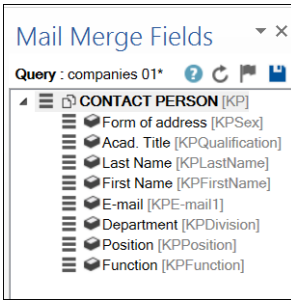This creates a blank quey, as shown in the screenshot below.

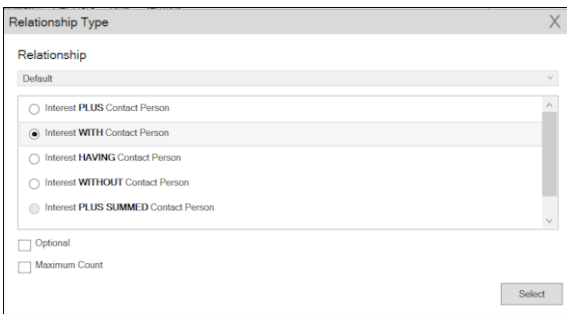c. Click **Add Info Area** to open the **Select info Area** dialog.

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.
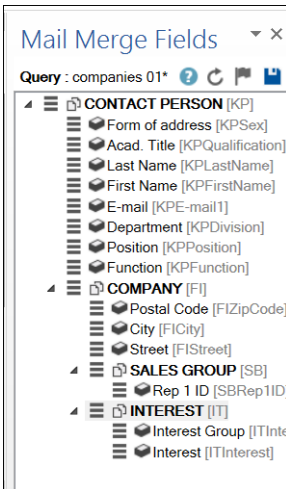

e. Select the required fields in the **Available Fields pane and click** ▶ **to move it to the Selected Fields pane**. Click **OK**. The selected infoarea and fields are displayed in the Mail Merge Fields.

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.
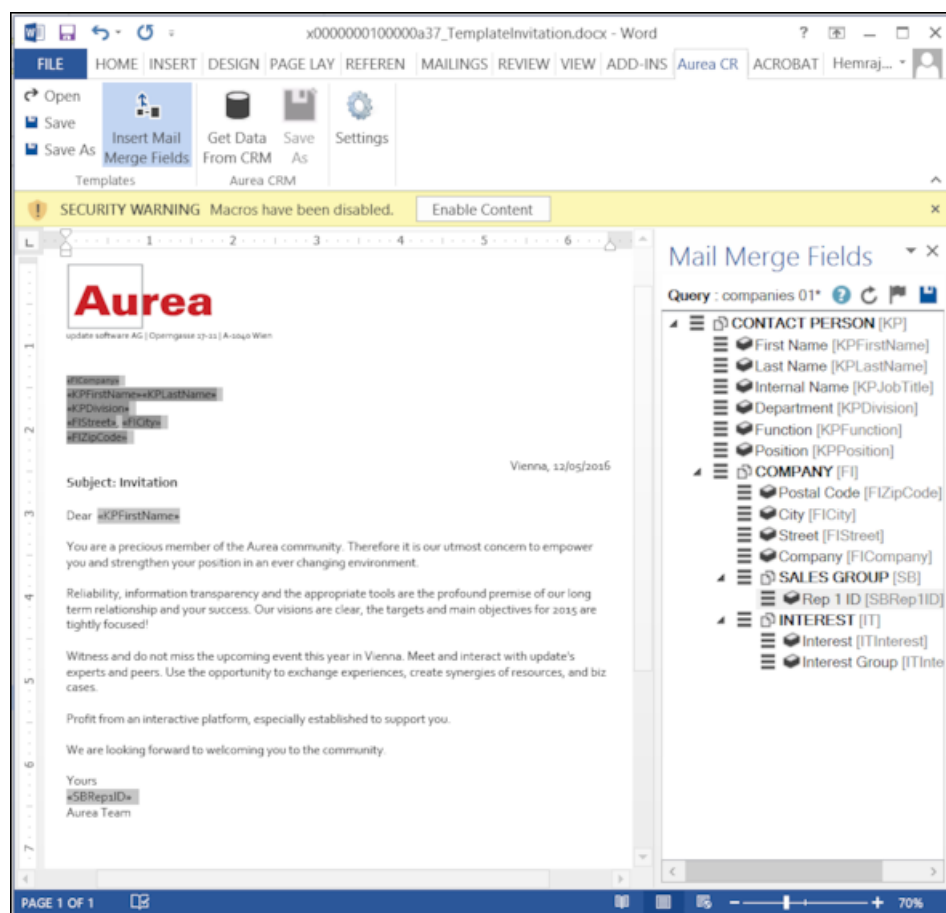

g. Select the required fields from for the new infoarea. The following screenshot shows the **Mail Merge Fields** with the selected info areas and parameters.

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.
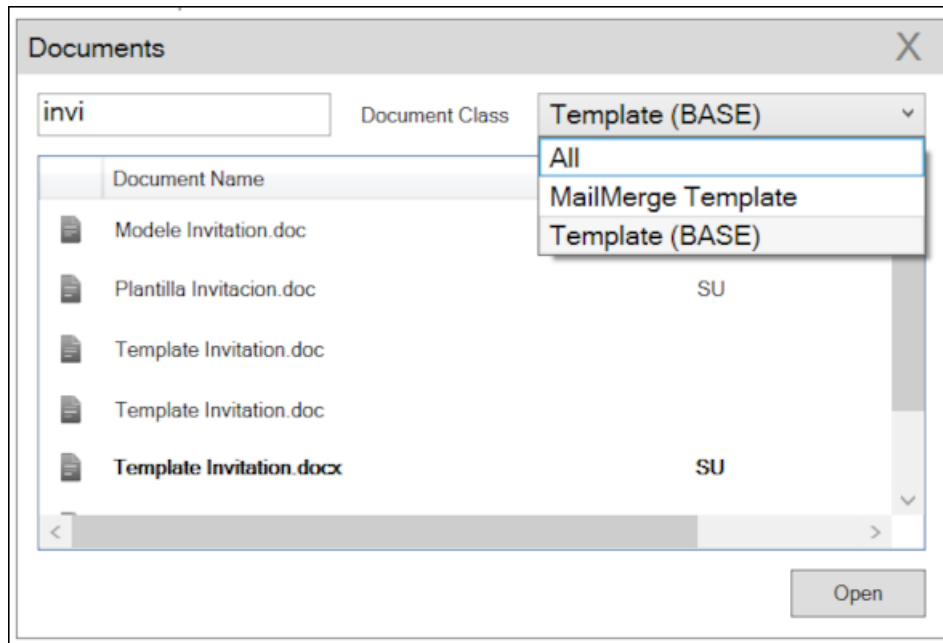

13. Click **Save**. The template document will be saved to the D1 infoarea on Aurea CRM server.

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.
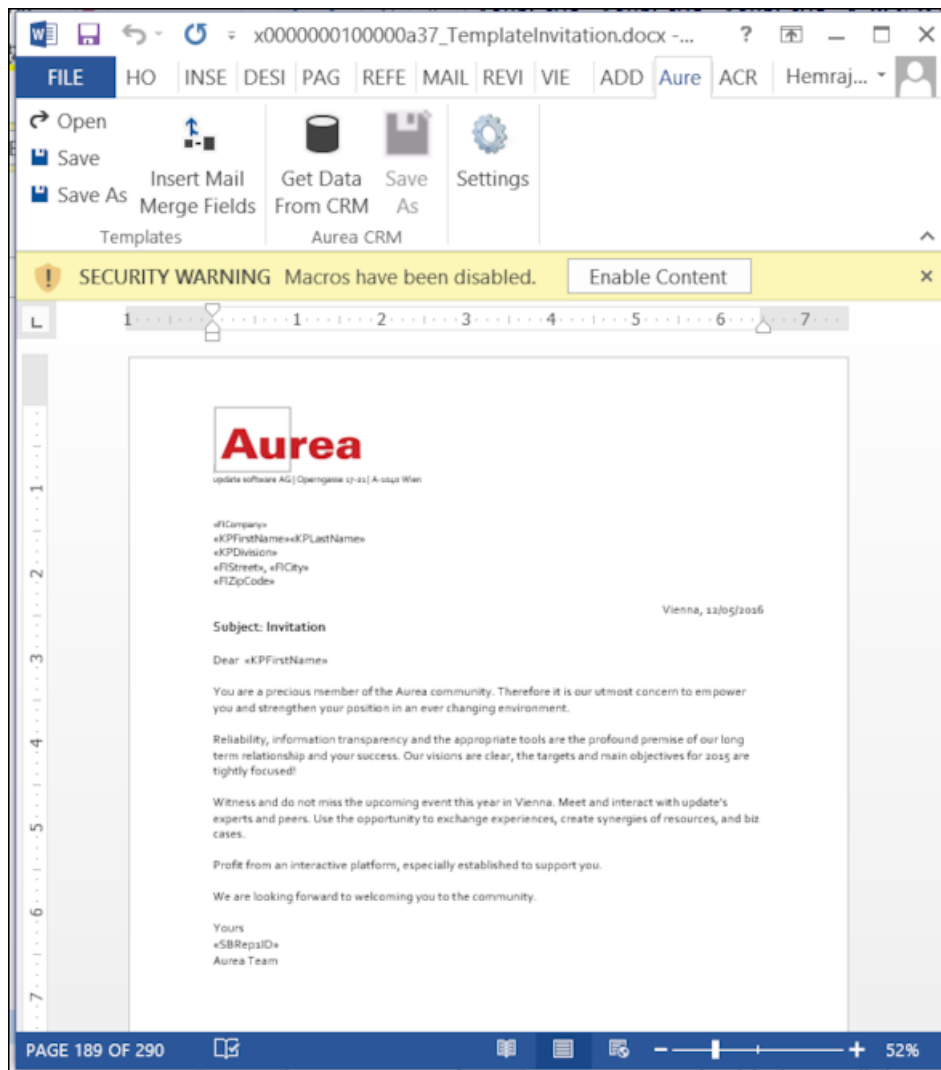
To open an existing template:

1. In the Microsoft Word, click on the **Aurea CRM** menu item.

2. Click **Settings**, and login to the Aurea CRM server.

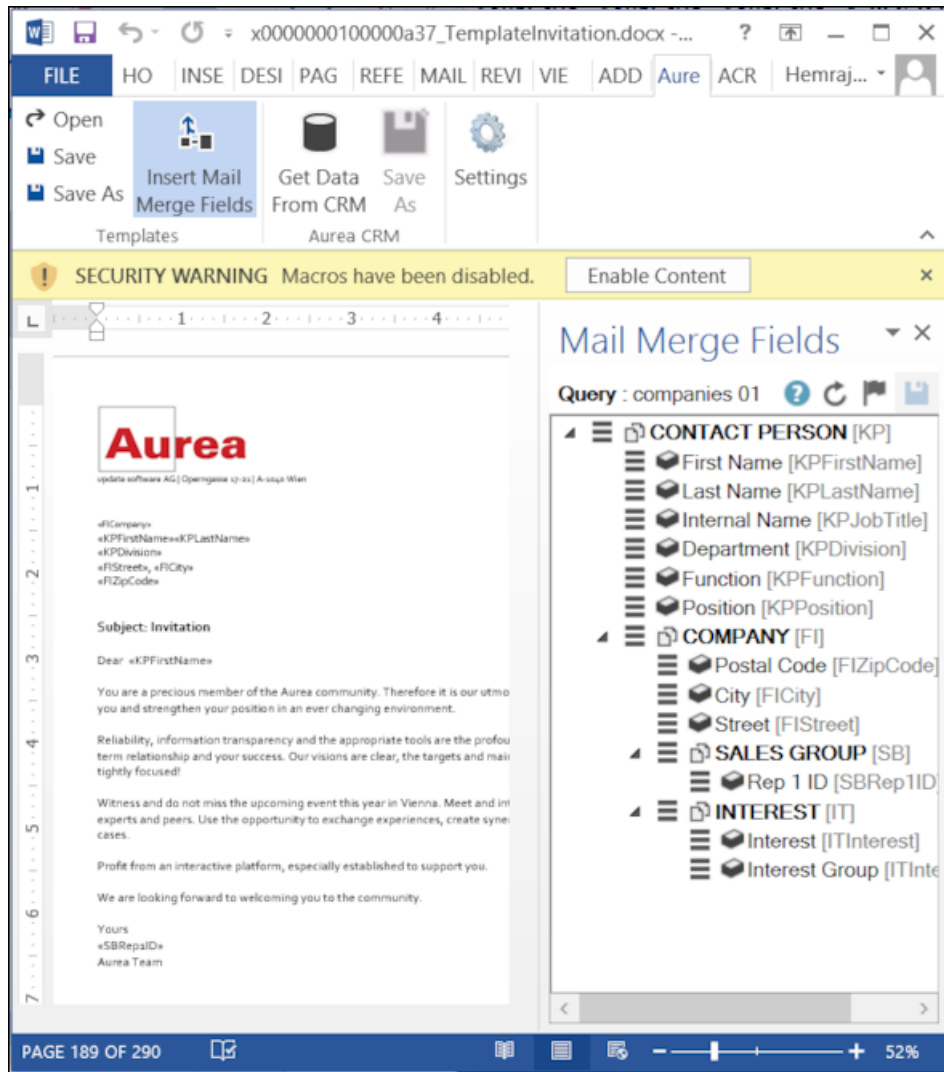**3.** Click **Open**. The **Documents** dialog is displayed.

You can type in the text box to filter for a specific document. You can also select the name of the template document. In the screenshot above, **Template (BASE)** was the document class selected and **invi** was typed in the filter text box, to find the **Template Invitation.docx** template.
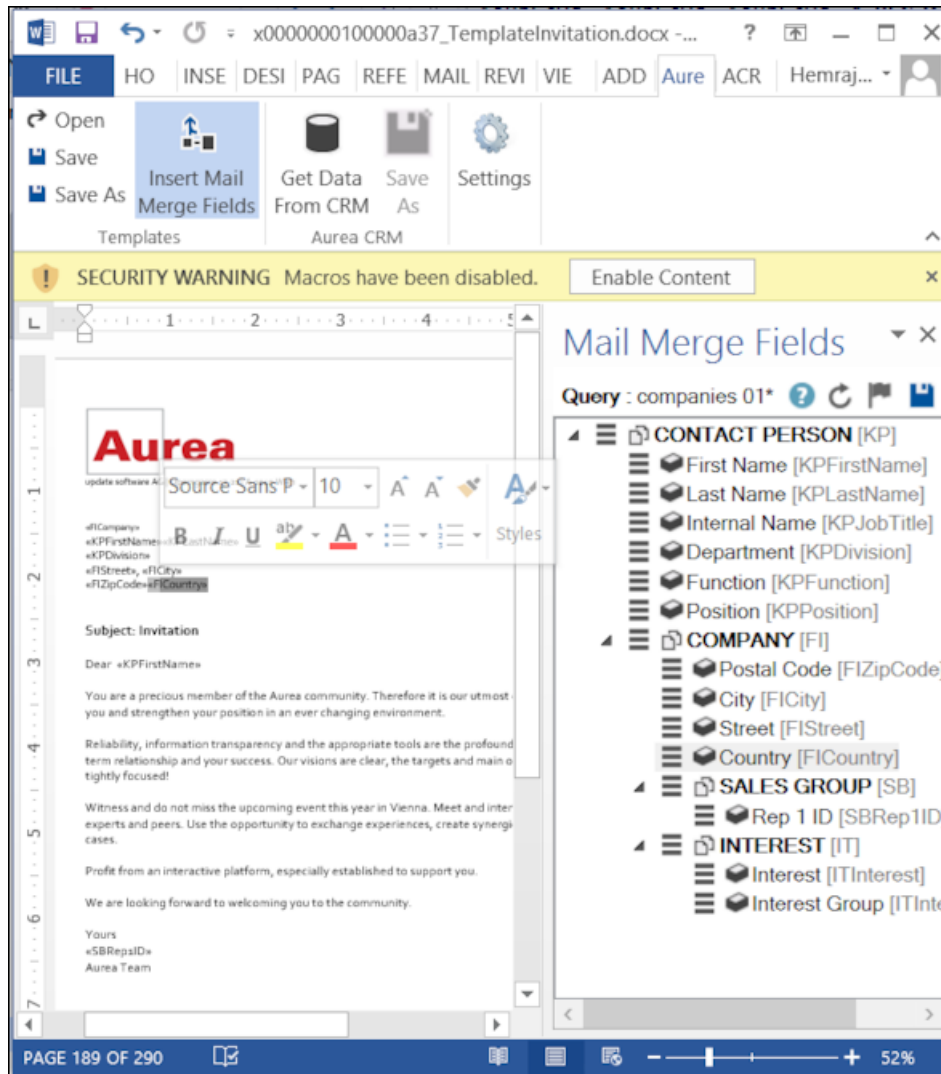
4. The selected template document is retrieved from the Server and loaded into Microsoft Word. For example, the screenshot below shows the **Template Invitation.docx**.

5. You can edit the template document and make modifications. For example, in the Invitation template.docx, you might want to add the country name, after the City name.

6. Click Insert Mail Merge Fields. The Mail Merge Fields column displaying the fields from the selected infoarea is displayed to the right of the editing pane. See the screenshot below.

7. To add a field from the infoarea to the template document, select the field and drag and drop it in the document at the appropriate position. For example, the Country field was selected and added to the document. See the screenshot below.
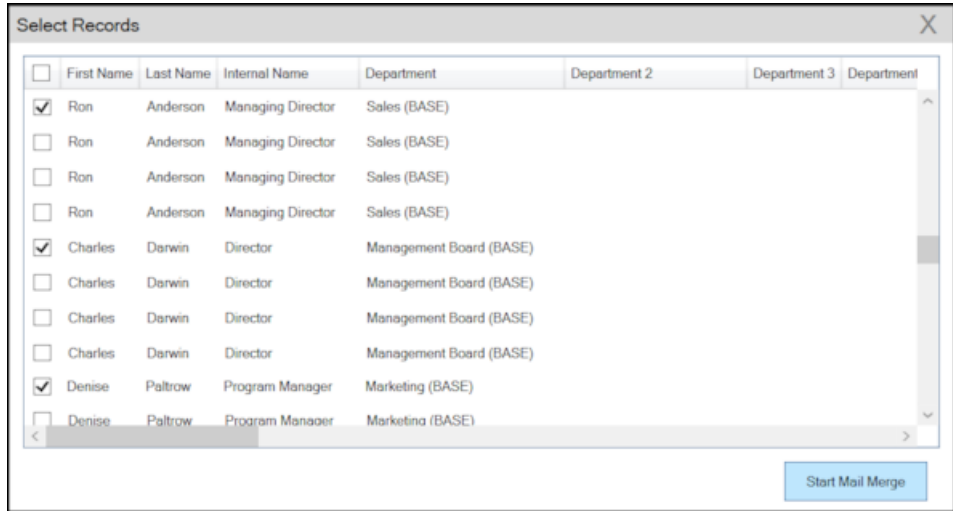
8. Click **Save**. The template document is saved to the D1 area of Aurea CRM.
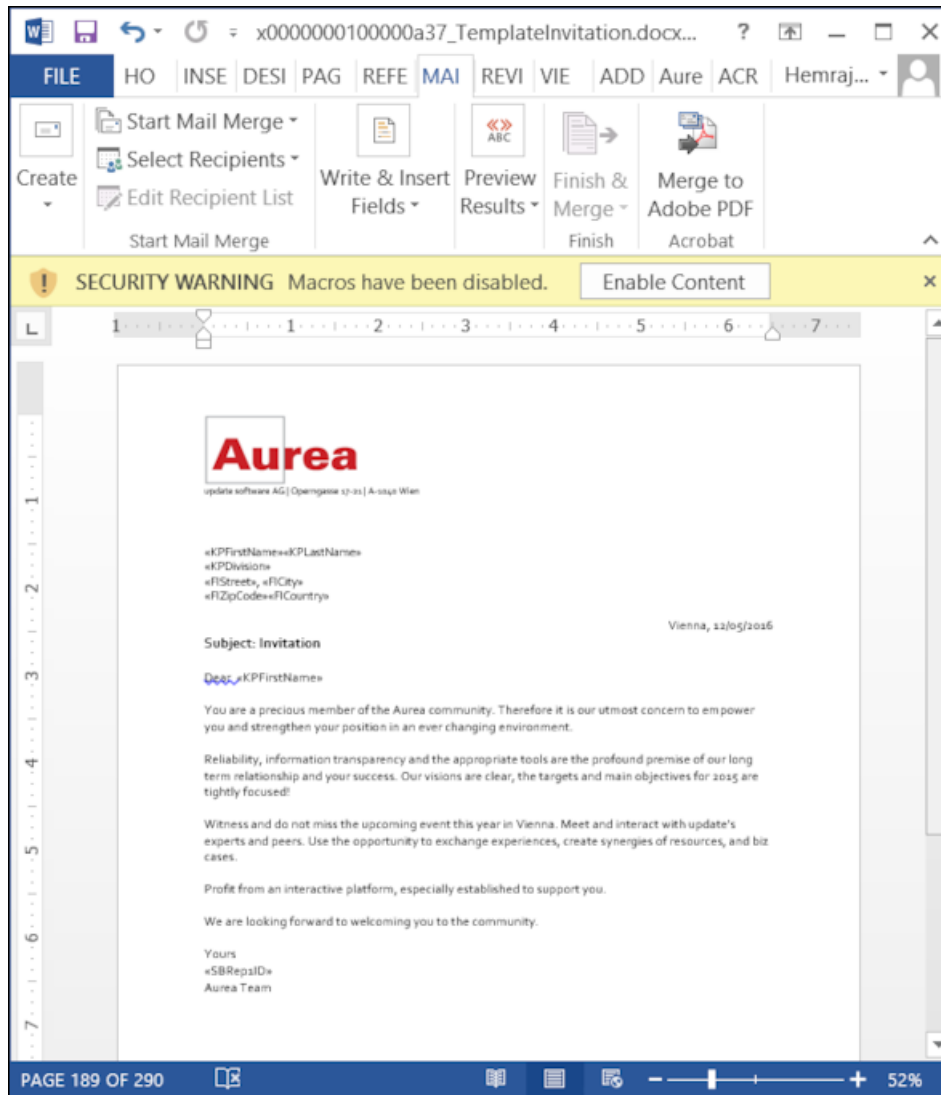
Mail Merge Using Document Templates

To generate a document for several persons using the document template:

1. From the Aurea CRM menu, login to the CRM server and open the Mail Merge template document. Edit the template document if necessary. For more information, see >> Opening and Editing document templates.

2. Click **Get Data From CRM**. The Select Records dialog displays single record or a list of records, showing the data fields you selected. You can then select the data you want use with the document template.

3. Click **Start Mail Merge**. The document is opened 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.

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.

Working with Images in the Template Document

You can add images and then modify them in the template document. The following steps show a sample of adding an image to the template document and modifying then making some modifications to the image. You will be using the standard functions available in Microsoft Word to process an image, like resizing and adding borders.

Perform the following steps:

1. Create a new blank template document. Perform steps 1 to 11 in the topic, *Creating and Saving 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 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:

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 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 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.

l. 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 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.

6. Click **Save As** to save the template document. The **Save As** dialog displays.

A default name in the following format is automatically displayed, `<document-Name>_<date>_<user name>.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

The **Item Master** info area stores basic information about individual items.

Select ![icon] (**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

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 ![icon] (**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.

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:

1. Select the desired entry in the item master and click on ⊕ (**New**) on the **Bundle Items** tab.

2. Click on 🔍 (**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).

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Select ![icon] (**Master data**) > **Item Master**.

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- 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.

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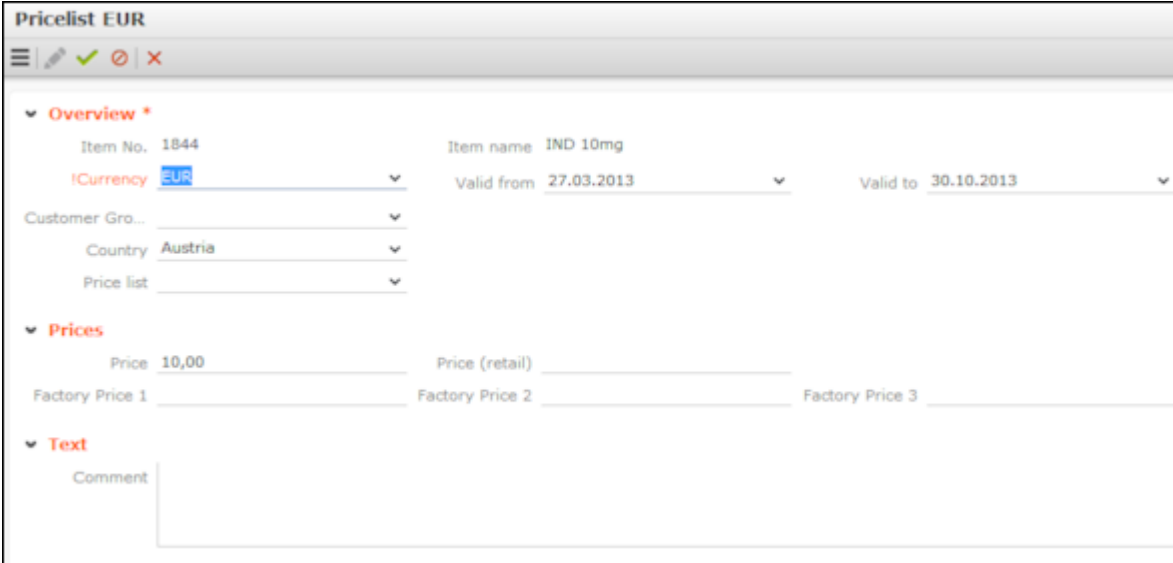
The following info areas access the item master:

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- **POS Monitoring Item**

- **Product Detailing Definition Item**

- **POS Material Item**

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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:

1. Select the desired entry in the item master and click on ⊕ (**New**) on the **Bundle Items** tab.

2. Click on 🔍 (**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 (**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 ⊕ (**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.

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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 ⊕ (**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.

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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

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 ⊕ (**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, >>

   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

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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 ⊕ (**New**).

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 ⊕ (**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, >> 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 (**Sales**) > **Special Offers**. Click on ⊕ (**New**).

2. 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:

1. 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 ⊕ (**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.

4. 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 > **Special Offer Bundles**.

2. Click on ⊕ (**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 ⊕ (**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:

1. 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.

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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 🛒 (**Sales**) > **Special Offers**. Click on ⊕ (**New**).
2. 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:

1. 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 ⊕ (**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.

4. 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 ![icon] (**Sales**) > **Special Offer Bundles**.

2. Click on ⊕ (**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 ⊕ (**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:

1. 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, >> 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.

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.

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.

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* 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 Business**s) > **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.
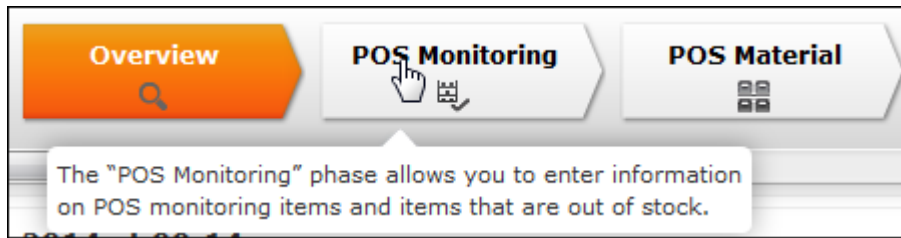
Data on the current visit is displayed at the top right next to the phases (e.g. the visited person/company).
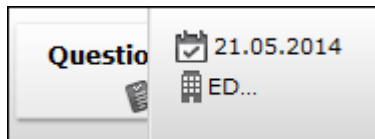
Data entered in the quick add area is saved automatically.

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 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.

- Double-click on an activity under **Undocumented activities over the last 7 days** to open the activity in the **Overview** phase, see 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.

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.

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.

- Click on a POS material record in the list to display the POS material items added for the record.

- Click on ▼ (**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.

Enter quantities in the quick add area:

- Enter item quantities in the quick add area.
- Click on ➕ (**New POS Material**) to add a new POS material record.
- Click on 🔍 (**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 ⊘ (**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.

- 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 ✛ (**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.

- 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 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.

If you are using the closed loop marketing add-on supplied by our partner SKURA, click on 🖳 (**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.

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 X̲ 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.

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.

- 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").

- 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.

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.

- 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 re-quire 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.

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.

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.

- Click on a POS material record in the list to display the POS material items added for the record.

- Click on ▼ (**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.

Enter quantities in the quick add area:

- Enter item quantities in the quick add area.

- Click on + (**New POS Material**) to add a new POS material record.

- Click on ⚲ (**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 ⊘ (**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.

- 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 ＋ (**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.

- 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.

If you are using the closed loop marketing add-on supplied by our partner SKURA, click on ▇ (**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.

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 X̲ 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.
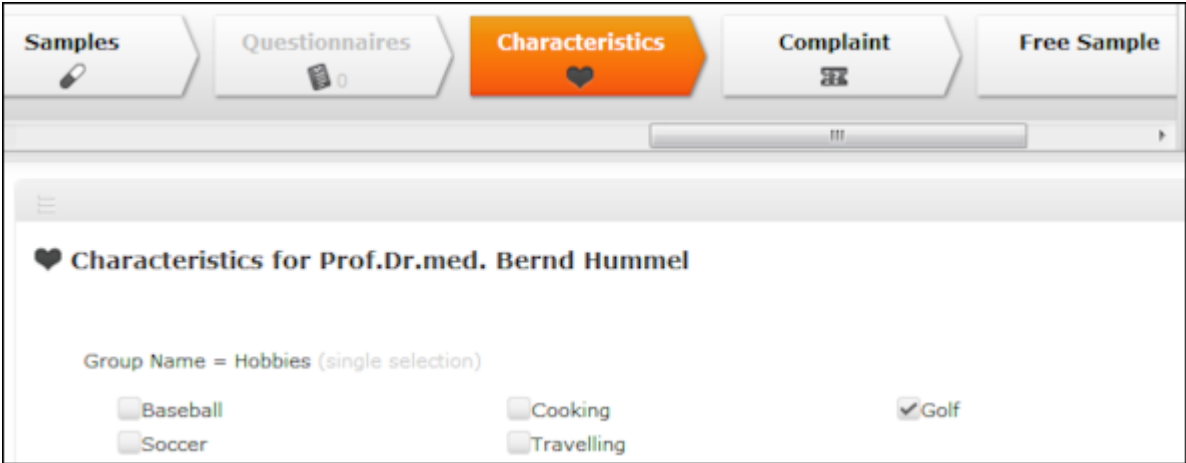

Questionnaires

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.

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.

- 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").

- 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 information. 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. Double-click 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**).
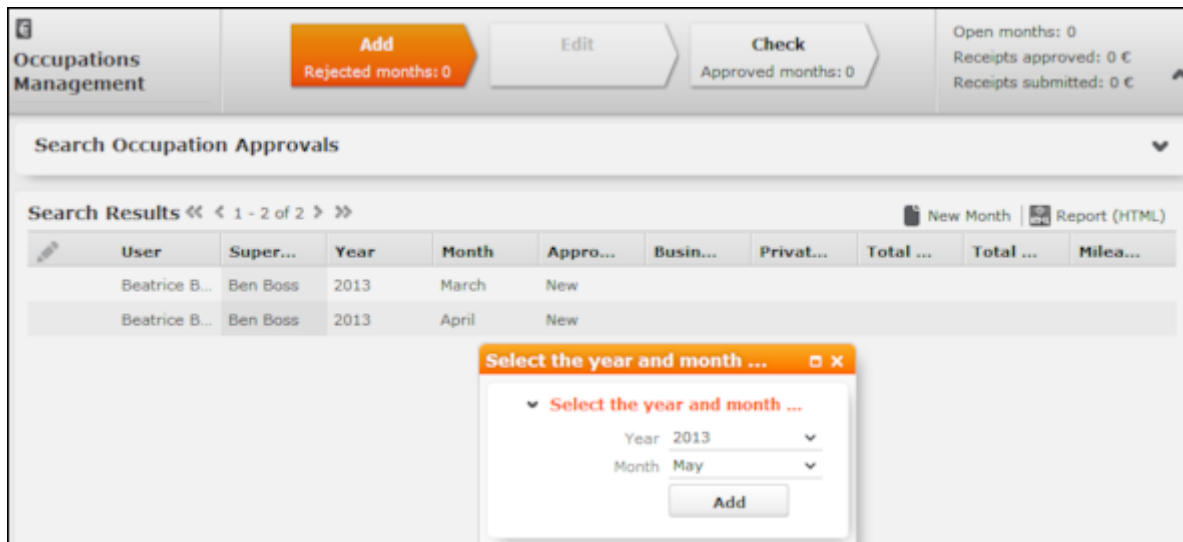
Phase 1 - Add

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
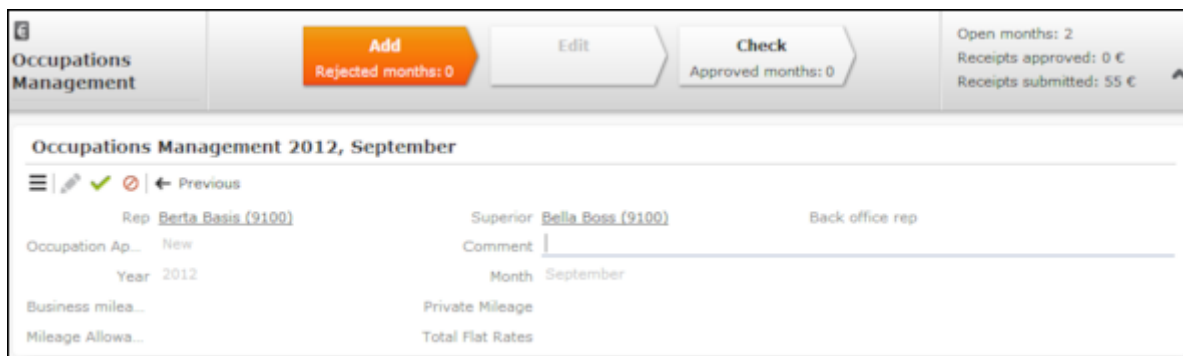
To add a new record:

1. Click on **New Month**.

2. Select the year and month you want to add a record for.

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.

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 ⌄ to display the search area and define additional search criteria.
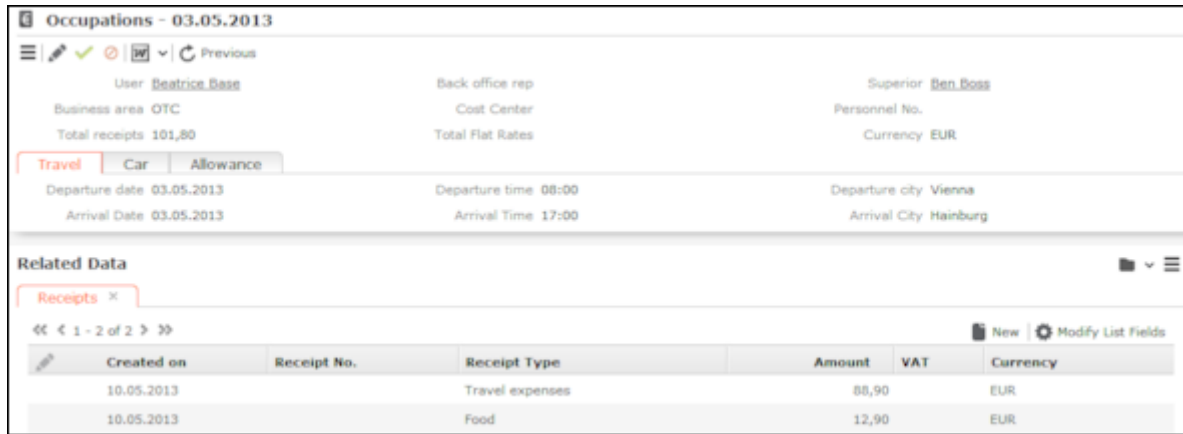

2. Enter the details of the work you have performed for each applicable day.

   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.

2. Enter additional data such as the **Departure city**, whether a **Company car** or **Hired car** was used etc.

3. 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.
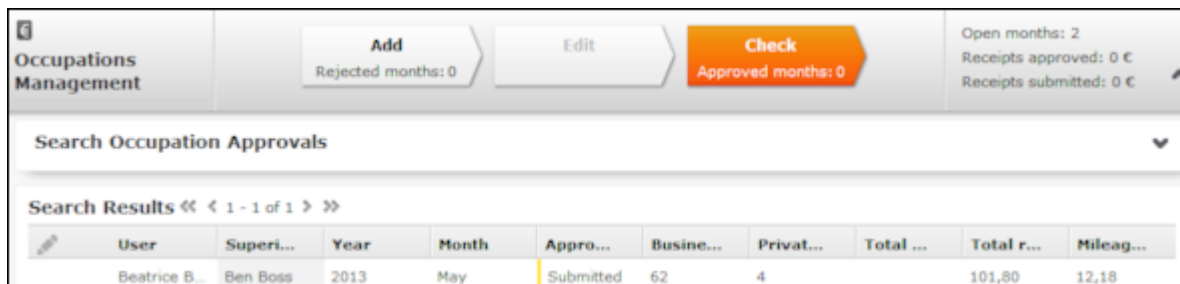
4. Save the record.

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 ↻ (**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.

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. Double-click 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**).
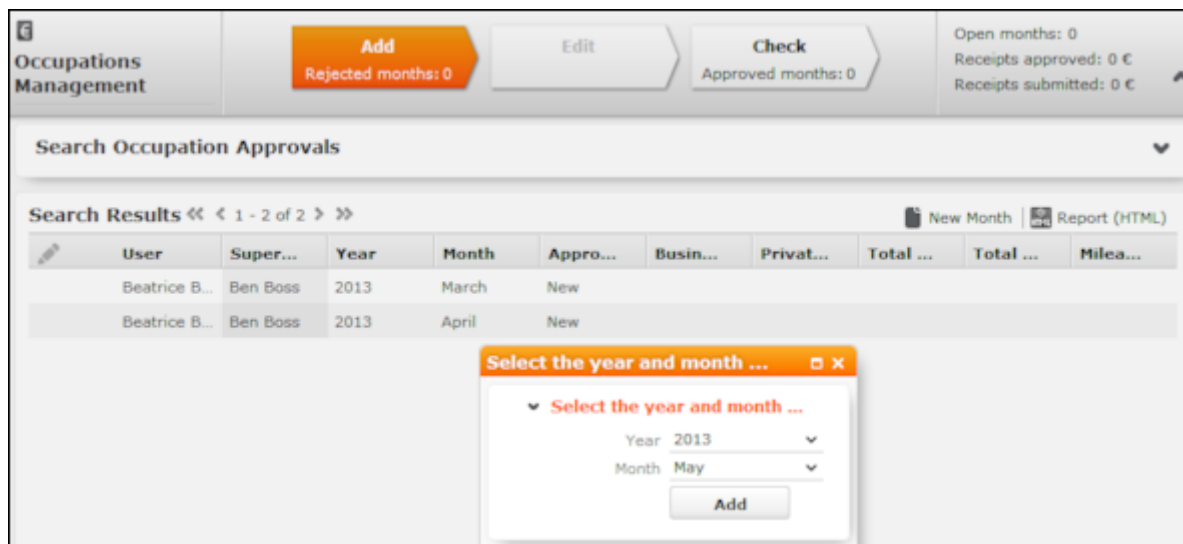
Phase 1 - Add

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.

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.

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 ❤ to display the search area and define additional search criteria.

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.

2. Enter additional data such as the **Departure city**, whether a **Company car** or **Hired car** was used etc.

3. 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.
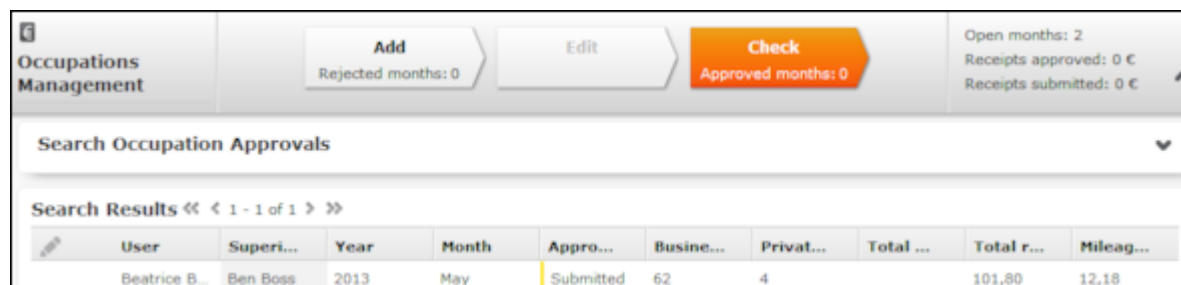
4. Save the record.

   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 ↻ (**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.

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:

1. 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.
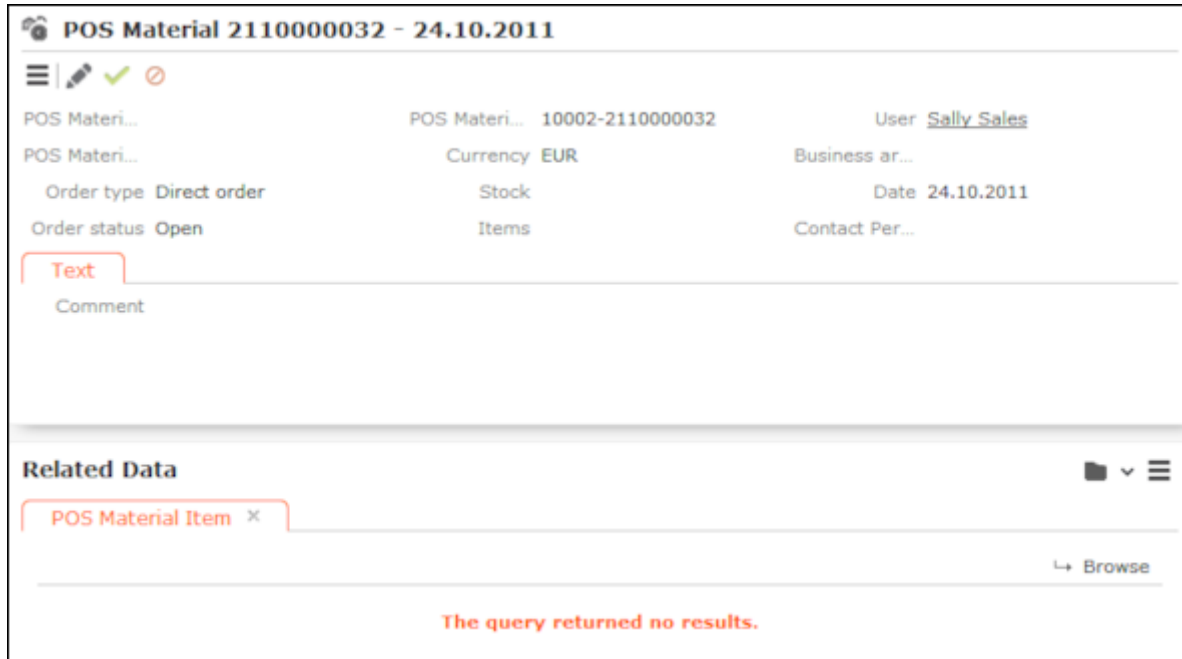

POS Materials

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 ⊕ (**New**).

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 ⊕ (**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 ⊕ (**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.

4. 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:

1. 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 ⊕ (**New**).

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.

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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 ![icon](Reference book) > **Listings** to display all listings.

Select ![icon](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 ⊕ (**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 ⊕ (**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.

4. 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 (**Sales**) > **Sales Cycles**.
2. Click on ⊕ (**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

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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 ![cart icon] (**Sales**) > **Sales Cycles**.

2. Click on ⊕ (**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.
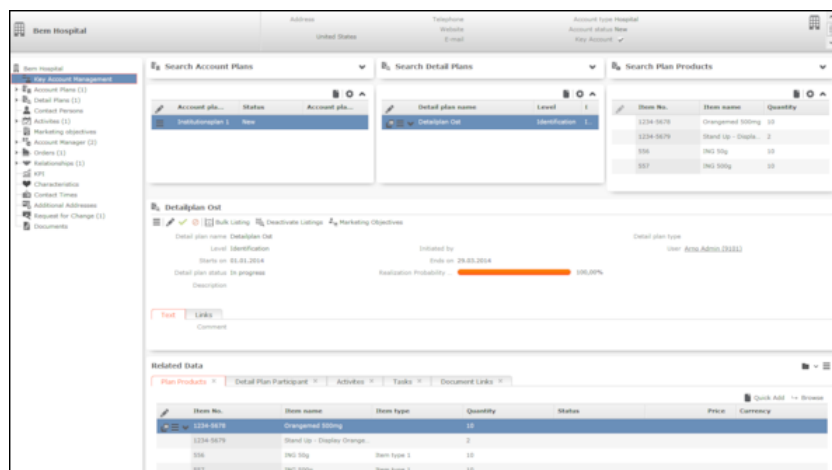
The **Key Account Management** area provides you with an overview of the account plans for an account, including associated detail plans and products.

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.
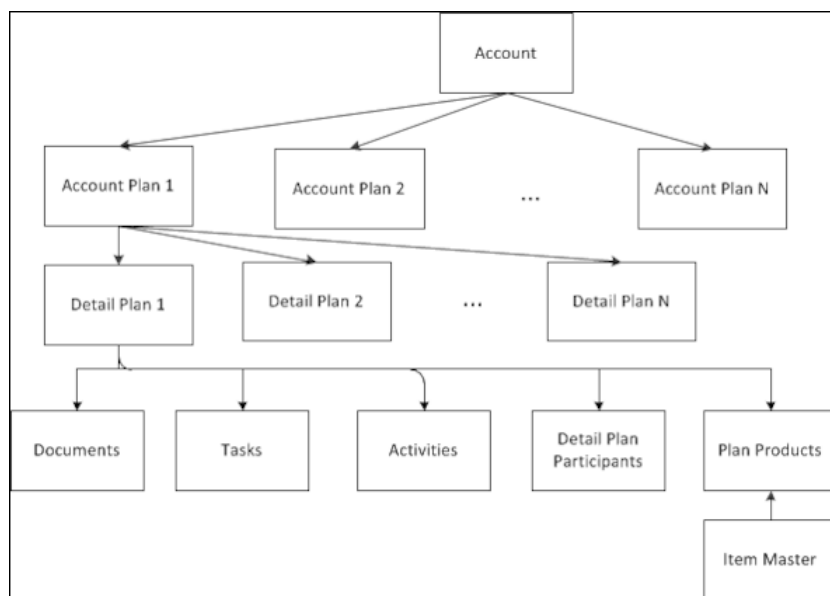
Depending on the corporate structure of your customers, you may have several account plans, e.g. one for each sales cycle with several detail plans including products for each account plan. Detail plans allow you to plan out your approach in detail.

Select > Account Plans or Detail Plans to display an overview of all account plans or detail plans added for all accounts.

Select > KAM Calendar to display an overview of all marketing activities, see .

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 ⊕ (**New**).

3. Enter data such as the **Account plan name**, **Currency**, **Budget** and a time period.

4. Save the record.

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 ⊕ (**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.

5. You can add further data to the detail plan from the tabs under **Related Data**.

   • **Plan Products :** Click on ⊕ (**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**).

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 (**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 ∨ 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**).

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:

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 🗈 (**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.

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 ⌄ 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 [icon] (**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 [icon] (**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 () > **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 **(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 ⊕ (**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 ![icon] (**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 ⊕ (**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.

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:

1. 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 ⊕ (**New**).

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 . 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:

1. 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 ⊕ (**New**).

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 > **Maintenance** > **Territory Management** and use the **Allocation** and **Allocation Configuration** tab to define how account managers are allocated.

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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.

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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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You can also allocate up to 8 reps to an account.

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* 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.

16

Product Detailing – LSI

You can select certain products in your item master that should receive special attention for a specific time period.
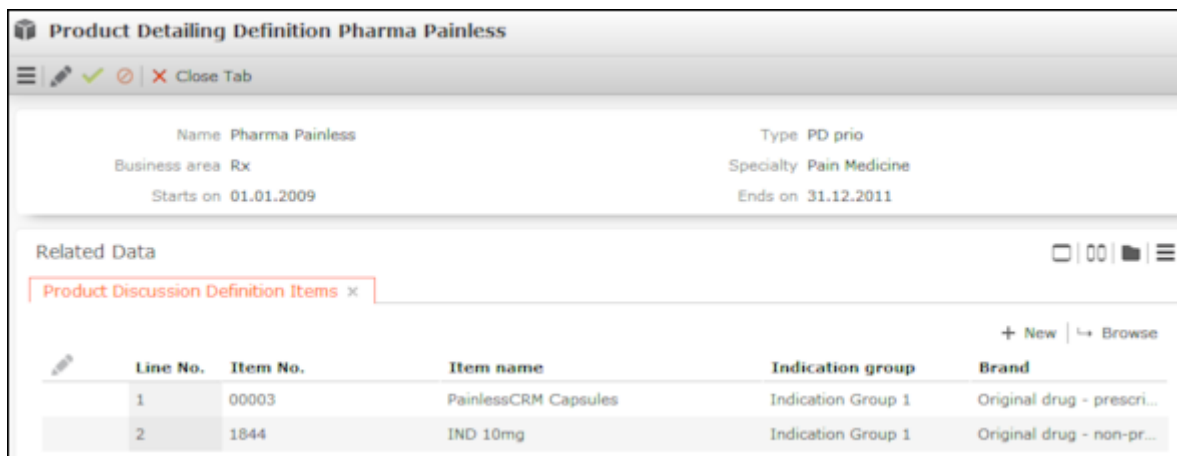
Use the **Product Detailing Definition** info area to define products and various items that is the subject of your focus for the defined time period, see Adding Product Detailing Definitions on page 504. Reps can link these items to activity records using the quick add features and enter the customer 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 ![cart icon] (**Sales**) > **Product Detailing Definition**.

2. Click on ⊕ (**New**).

3. Enter a name in the **Name** field.

4. 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.

5. 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.
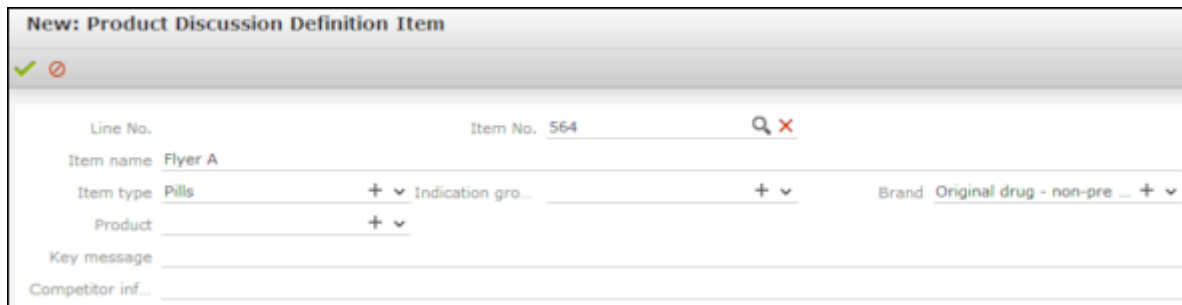
6. Enter the **Business area** and/or **Specialty**. The items that are displayed in the quick add area for product detailing are determined based on this data as follows:

* 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.

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.
2. Select **Quick Add (Product Discussions)** from the context menu, see Quick Add on page 164.
3. 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 ⊕ (**New**).

3. Enter a name in the **Name** field.

4. 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.

5. 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.

---

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.

2. Select an item from the **Item No.** field. The **Item name**, **Item type**, **Brand**, **Product** and **Indication group** are entered automatically.

3. 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.

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1. Switch to the desired activity or add a new one, see Adding Activities on page 292.

2. Select **Quick Add (Product Discussions)** from the context menu, see Quick Add on page 164.

3. 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 🛒 (**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 ⊕ (**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 ⊕ (**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.
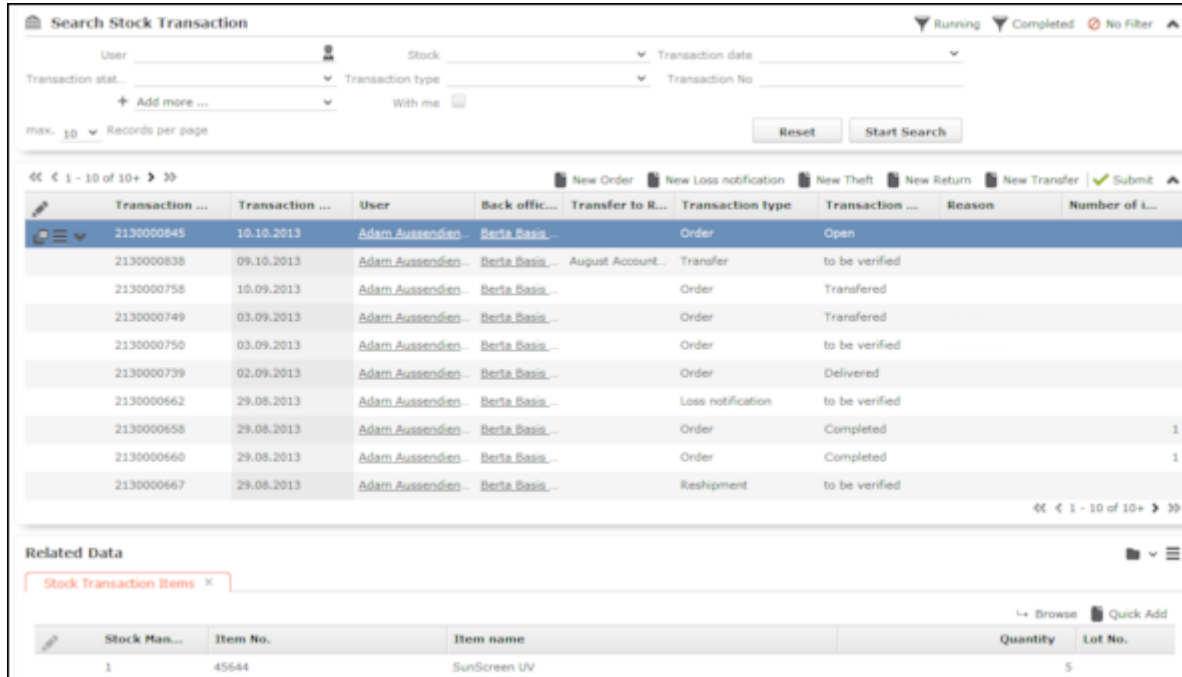
Note: Your administrator can determine that your superior is responsible for approving transactions instead of back office staff.

Adding Stock Transactions

Learn to add Stock Transactions.

To add a stock transaction:

1. Select ![cart] (**Sales**) > **Stock Transaction** to open the search.

You display stock transactions that are in progress or have been completed, or display all transactions using ⊘ (**No Filter**).

Note: Sales reps can only view their own stock transactions while back office staff can view all transactions.

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2. Select an option, e.g. ⊕ (**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 **I'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.

5. 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 ✔ (**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 (⊕ (**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:
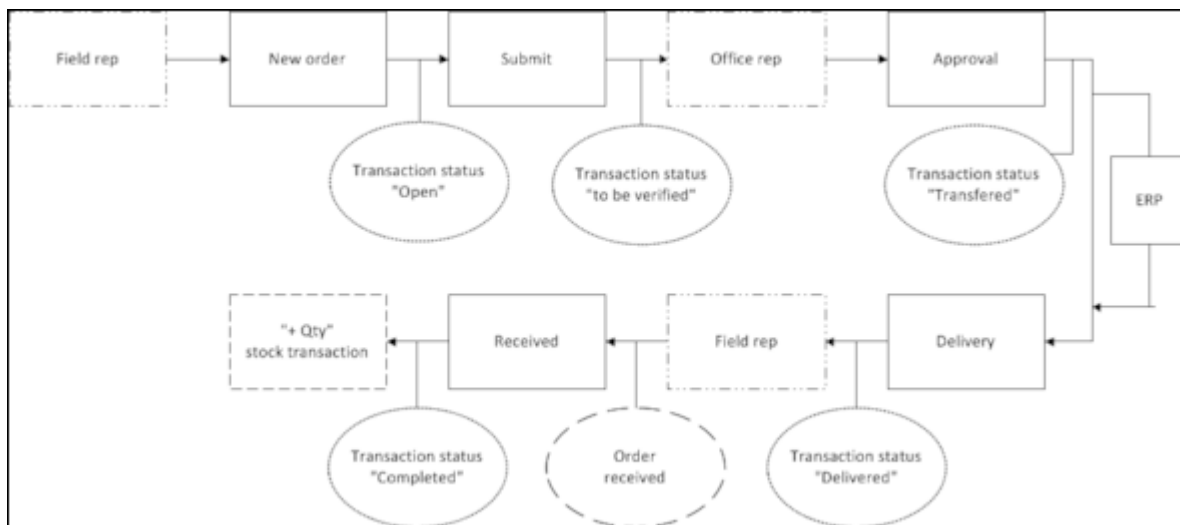
1. **Sales Rep**

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 👤 (**Delivered**), the **Transaction status** is set to "Delivered" and the sales rep is informed of this on the start page.

- ✖ (**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 ⬇ (**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:
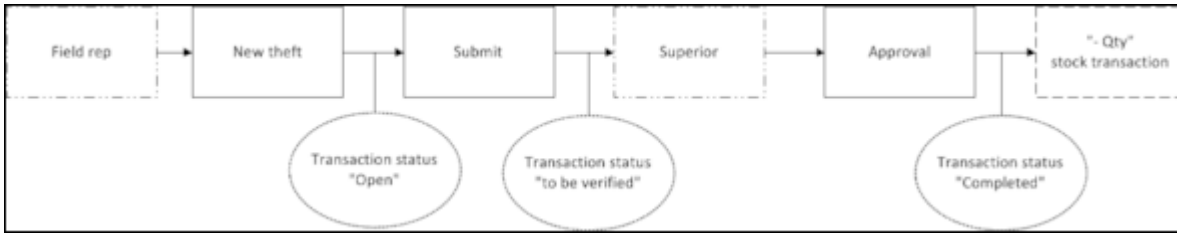
1. **Sales Rep**

   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:

   - ⚑ (**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".

   - ✖ (**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:
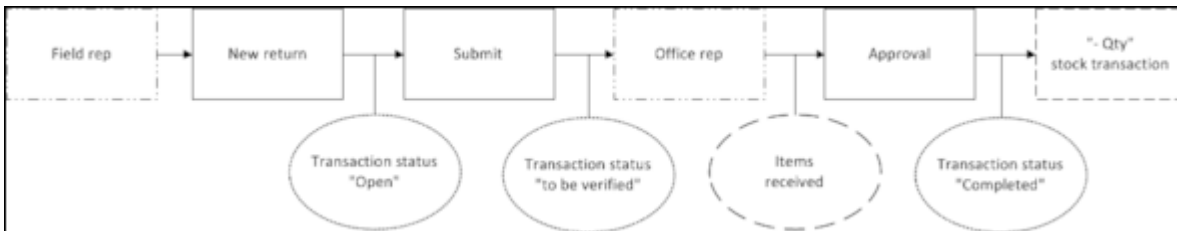
1. **Sales Rep**

   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".

- ✖ (**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:
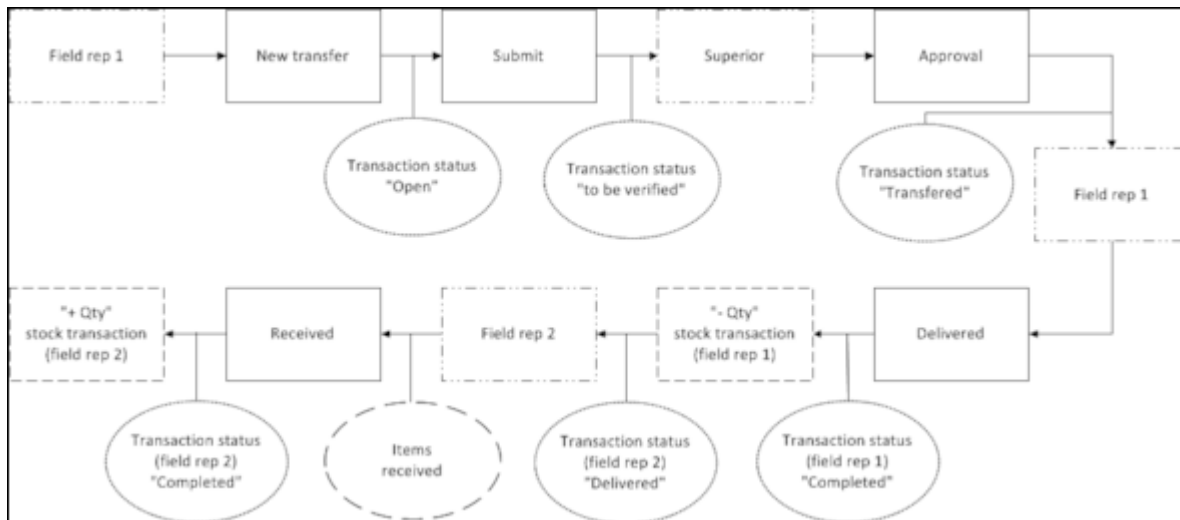
1. **Sales Rep 1**

   Sales rep 1 applies to transfer the item, see . 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.
- ✖ (**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:

1. Select ▨ (**Marketing**) > **Marketing Calendar**. The marketing calendar is displayed.
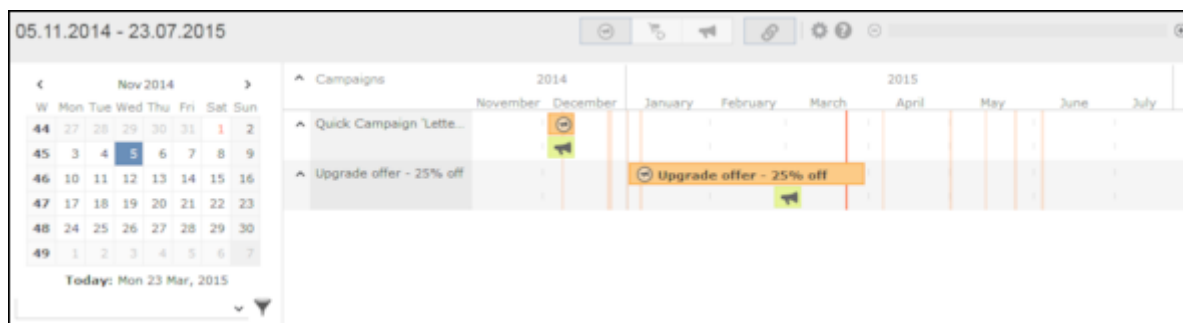
   Individual elements (campaigns, sales cycles, marketing activities) are displayed as colored blocks.

> **Note:** If no end date is entered in a marketing activity, it is displayed as lasting for a single day.

The current date is indicated by a vertical line.

You can edit and display campaigns and activities in a number of ways:

*   Use the icons in the header to choose what to display:

    *   ⊖ : Campaigns and marketing activities

    *   ⅋ : Sales cycles and marketing activities

    *   📢 : Only marketing activities

*   To display or hide the marketing activities that make are part of a campaign, click on ⌃ or ⌄ in the left-most column. Click on ⌃ or ⌄ in the column header to hide/show all marketing activities for all campaigns.
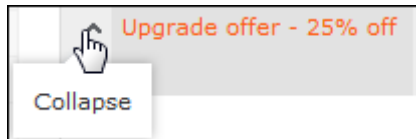
*   ⚙ (**Edit Settings**): Choose whether to color-code elements by type (info area) or status.

*   ❷ (**Legend**): Displays information on the colors in the calendar

*   To configure the time period that is displayed:

    *   Click on the desired day or start of the time period in the small calendar in the sidebar.

    *   Select the time period that is displayed using the slider in the header: drag the slider to the left or right or click on the plus and minus signs on either side to zoom in or out.
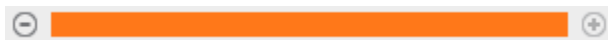
    *   Drag the timeline at the top of the calendar to the left of right to scroll the time period.

*   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:
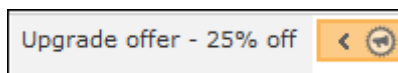
- To change an entry's start or end, click on the left or right border and drag it to the desired position:
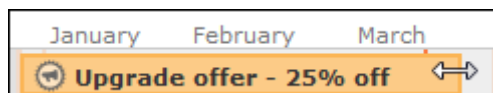
- To reschedule an element, click on it and drag it to the desired time.

  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.

2. Click **Save**.

3. 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 ![icon] (**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.

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.
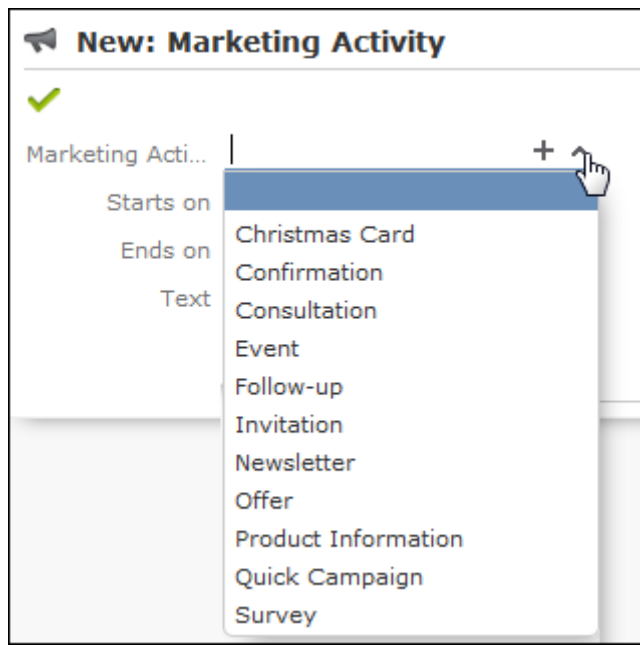
4. Enter the start and ed date in the **Start on** and **Ends on** fields.

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 ⊕ (**New**).

3. Enter the **Response** (e.g. "Yes, send me an offer").

4. Select the second marketing activity in the **Follow-up Marketing Activity** field.

   If this response is received, the respondent is automatically assign to the follow-up marketing activity's target group.

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, 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 ⊕ (**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

7. Enter the rep assigned to CRM.server in the **Executing user** field. (Ask your administrator for this information.) This ensures that CRM.server processes the execution automatically.

8. Define additional options in the following tabs:

   • **Letter, E-Mail, Fax, SMS:** Information on the contents of the information that is sent, e.g. the e-mail's text; settings for surveys sent out in e-mails.

   • **Activities:** Details on the generated activities and information on surveys

   • **Mailings:** Details on the generated mailings

   • **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).

5. 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**).

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:

```html
<body>
    <p style="font-family:verdana; font-size:10pt">
    Dear <%KPFirstName%> <%KPLastName%>,<br /><br />

        We would like to invite you to take part in our customer satisfaction survey.
        <br />
        Please tak the time to tell us your
        <a href="<%LinkQuestionnaire%>">opinion</a>
        on our catalogs and delivery service.<br /><br />

    Thank you for your time!<br /><br />

    Your Flora Bouquets team.<br /><br />
     </p>
    <p style="font-family:verdana; font-size:8pt">
    This e-mail was sent to mailto:<%KPE_Mail%>.
    </p>
</body>
```

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.

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 ⊕ (**New**).

3. Enter the **Response** (e.g. "Yes, send me an offer").

4. Select the second marketing activity in the **Follow-up Marketing Activity** field.

If this response is received, the respondent is automatically assign to the follow-up marketing activity's target group.

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 ⊕ (**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.

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

7. Enter the rep assigned to CRM.server in the **Executing user** field. (Ask your administrator for this information.) This ensures that CRM.server processes the execution automatically.

8. Define additional options in the following tabs:

- **Letter, E-Mail, Fax, SMS:** Information on the contents of the information that is sent, e.g. the e-mail's text; settings for surveys sent out in e-mails.

- **Activities:** Details on the generated activities and information on surveys

- **Mailings:** Details on the generated mailings

- **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).

5. 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>
    <p style="font-family:verdana; font-size:10pt">
    Dear <%KPFirstName%> <%KPLastName%>,<br /><br />

        We would like to invite you to take part in our customer satisfaction survey.
        <br />
        Please tak the time to tell us your
        <a href="<%LinkQuestionnaire%>">opinion</a>
        on our catalogs and delivery service.<br /><br />

    Thank you for your time!<br /><br />

    Your Flora Bouquets team.<br /><br />
     </p>
    <p style="font-family:verdana; font-size:8pt">
    This e-mail was sent to mailto:<%KPE_Mail%>.
    </p>
</body>
```

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.

7. 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**), 👤 (**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.
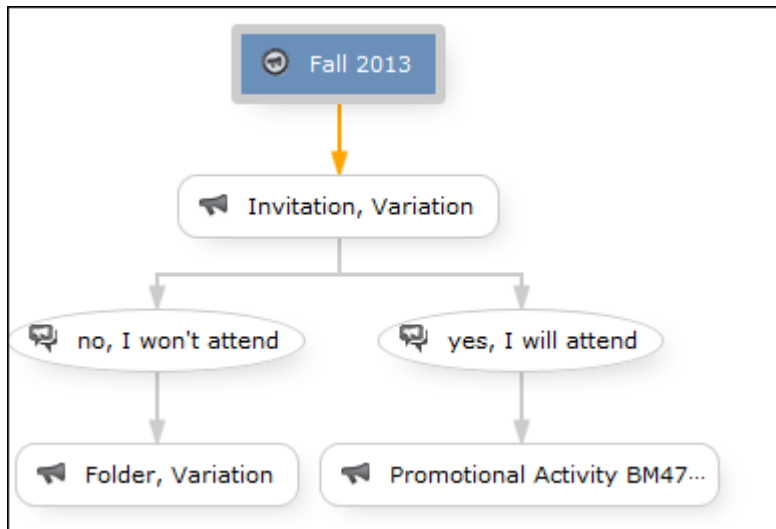
The following options are available:

- 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
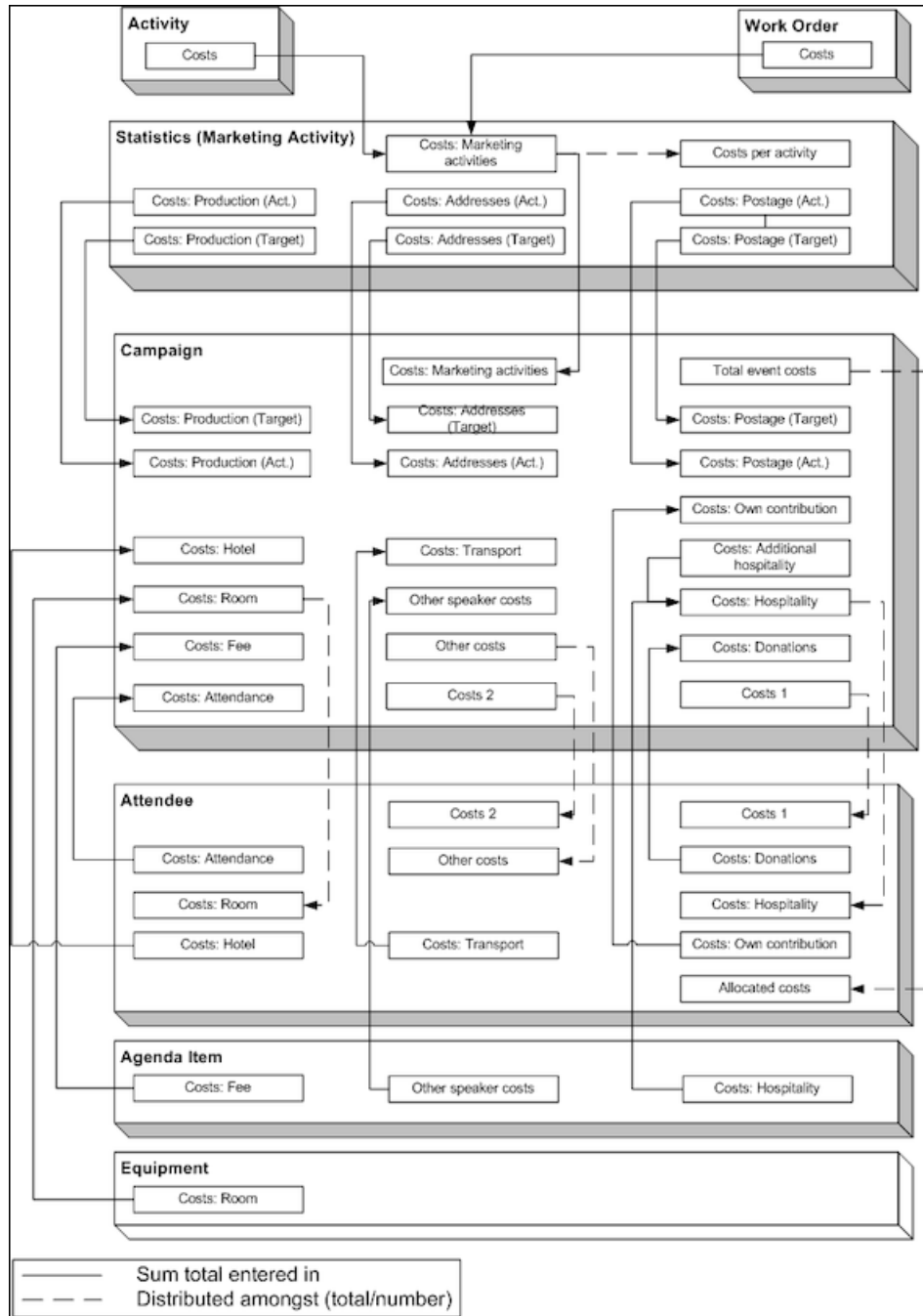
Campaign costs calculated based on data entered in the **Attendee**, **Agenda Item** and **Equipment** info areas are updated whenever you add a new record or edit an existing one. You can also click on **Calculate** in the **Campaign** info area to calculate the costs.

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
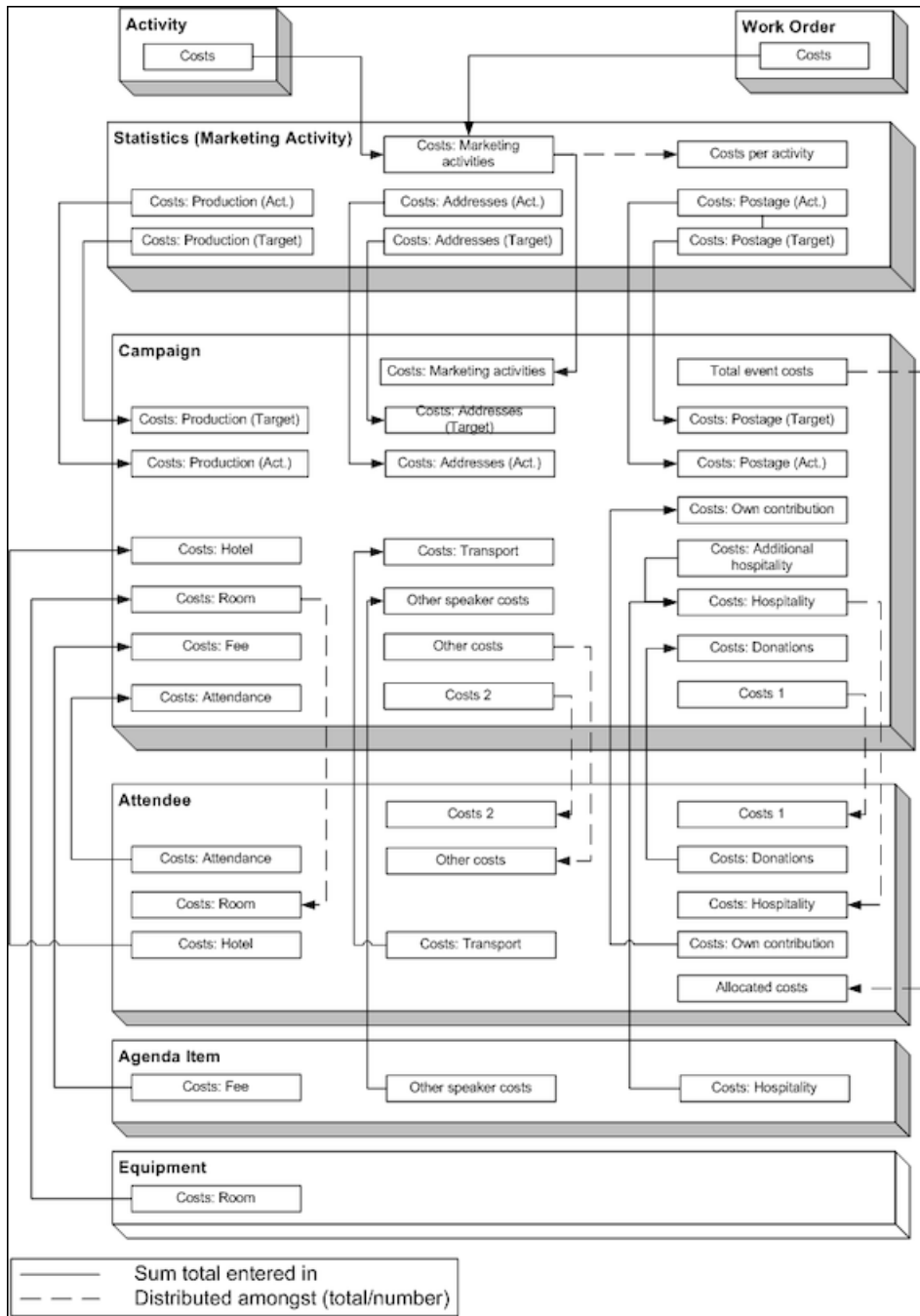
Campaign costs calculated based on data entered in the **Attendee**, **Agenda Item** and **Equipment** info areas are updated whenever you add a new record or edit an existing one. You can also click on **Calculate** in the **Campaign** info area to calculate the costs.

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
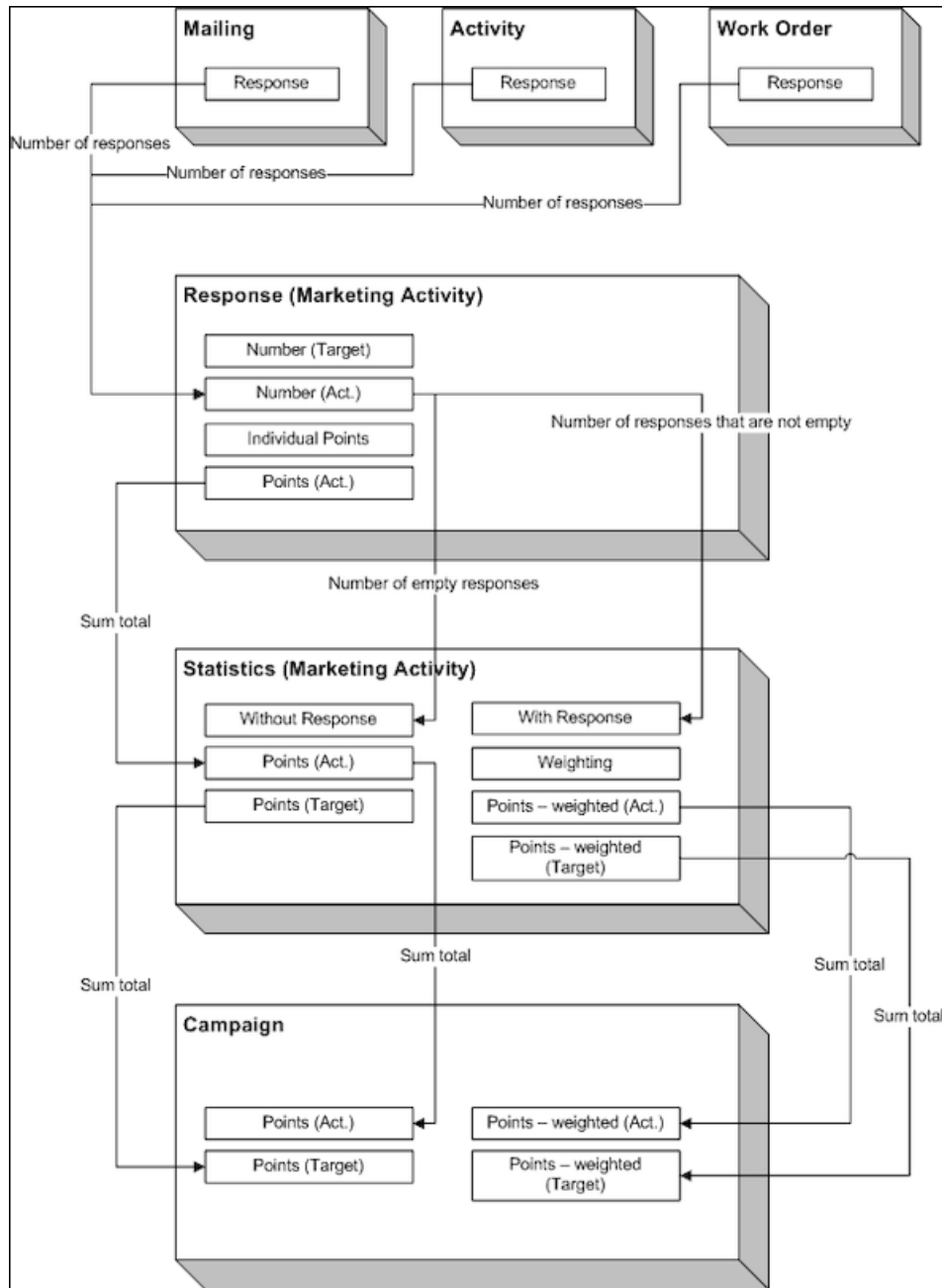
Campaign and Marketing Activity Templates

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 ⊕ (**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

2. A Microsoft Word message may be displayed if you are opening a Word document. Confirm with **Yes**.

3. The document is opened in the associated application.

4. Edit the document:

You can edit the text.

You can add additional fields to the document (**Mailings** tab, **Insert Merge Field** option).

HTML files may contain additional fields in comments.

Save the document locally.

You can either directly enter the updated document in a marketing activity execution record or first upload it to the Aurea CRM database (**Documents** info area), see Documents on page 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 follow-up by telephone or a personal consultation depending on the response to the e-mail.

- "Product Information" marketing activity: This marketing activity sends out e-mails and create activities. The target group is created using a query. The activity uses the CORE_ProductInformation_E-Mail.htm document template to send out the e-mail.

  Three responses are defined: The response "Interested" assigns the respondent to the "Consultation" marketing activity; "No response" assigns the recipient to the "Follow-up" marketing activity; "Not interested" has no follow-up marketing activity.

- "Follow-up" marketing activity: Creates telephone activities; the target group is generated automatically for those recipients where "No response" is entered in the "Product Information" marketing activity.

  Three responses are defined: The response "Interested" assigns the respondent to the "Consultation" marketing activity; "No response" assigns the recipient to the "Follow-up" marketing activity; "Not interested" has no follow-up marketing activity.

- "Consultation" marketing activity: Creates visit activities; the target group is generated automatically for those respondents who replied with "Interested" to either the "Product Information" or "Follow-up" marketing activity.

Event

- "Invitation" marketing activity: This marketing activity creates activities and letters. The target group is created using a query. The activity uses the CORE_English_Invitation.doc. document template for the letter.

  Three responses are defined: The response "Accepted" assigns the respondent to the "Confirmation" marketing activity; "No response" assigns the recipient to the "Follow-up" marketing activity; "Declined" has no follow-up marketing activity.

- "Follow-up" marketing activity: Creates telephone activities; the target group is generated automatically for those recipients where "No response" is entered in the "Product Information" marketing activity.

  Three responses are defined: The response "Interested" assigns the respondent to the "Confirmation" marketing activity; "No response" assigns the recipient to the "Follow-up" marketing activity; "Not interested" has no follow-up marketing activity.

- "Confirmation" marketing activity: Creates e-mail activities; the target group is generated automatically for those respondents who replied with "Accepted" to either the "Invitation" or "Follow-up" marketing activity. The e-mail document template CORE_Confirmation_E-Mail.htm is used by this marketing activity.

  Only one response is defined, "OK", which assigns the respondent to the "Event" marketing activity.

- "Event" marketing activity: This marketing activity corresponds to the actual event. The target group is made up of those respondents whose responded with "OK" to the "Confirmation" marketing activity.

  Two responses are defined: "Attended" and "Did Not Attend". 50 points are assigned to the "Attended" response.

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 ![icon] (**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 ![icon] (**Yes**) or ![icon] (**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.

Campaign Management (Enterprise CRM) overview

The Campaign designer allows you to quickly create a campaign in an intuitive way and uses a graphical representation to make the campaign design process simple.

You can create campaigns and their marketing activities with clear representation of the works flows involved. Campaigns, marketing activities, and response are represented as containers in the graphical view.

Note: Campaign management is an enterprise feature, you need to have enterprise license for Aurea CRM to use this feature.

Components of the Campaign Management:

- Campaign calendar
- Campaign Designer

Working with Campaign Calendar

The campaign calendar shows all the campaigns and marketing activities.

You can start a new campaign from this window by clicking the Create New Campaign button. You can also select and open a campaign shown in this window to open it in the campaign designer.

The following screenshot shows a campaign calendar.

The campaign calendar tab at the top is visible when you open any campaign.

Working with Campaign Designer

You can create, edit, and delete campaigns and their marketing activities in the campaign designer.

You can create a new campaign using an existing campaign as a template or create a new campaign from scratch.

Creating a new campaign from scratch

To create a new campaign from scratch, perform the following steps:

1. Click the Marketing menu icon, and select **New Campaign** from the menu.

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.

- To use an existing marketing activity:

    1. From the context menu select **Reuse Marketing Activity**. The **Reuse Marketing Activity** window opens. ✓ Proceed

    2. Search for the marketing activities from a campaign and select it from the search list.

    3. Enter a New Start Date for the marketing activity, in the resulting window.

    Note: If you do not provide a start date for the marketing activity then the start date on the reused marketing activity is used as start date.

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    4. Click OK. The marketing activity and its descendent marketing activities are added to the campaign designer.

    5. Next you can make further additions to the marketing activity.

- To create a new marketing activity:

    1. From the context menu select **New Marketing Activity**. The **New Marketing Activity** window opens.

2. Enter the following details for the new marketing activity:

- **Marketing activity** – Select the marketing activity type from the following: Confirmation, Event, Follow-up, Invitation, Survey, Survey-remainder. (Mandatory field)

- **Starts on** – The start date for the marketing activity.

- **Ends-on** – The end date for the marketing activity.

- **Resp.Rep ID** – The ID of the rep responsible for the marketing activity.

- **Costs** – The estimated cost of the marketing activity.

- **Currency** – Select the currency the cost is estimated in.

- **Text** – Provide a description and other relevant information in this text field.

3. Click **Save** to create the new marketing activity container in the campaign

designer.

Note: A blue arrow points from the campaign container to the marketing activity container.

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4. In the next step you need to define some responses for this marketing activity.

6. The context menu for the marketing activity container allows you to perform the following: Define responses, Channel and Format definition; Target group and Execution definition; Edit Target group; Notify Rep; Edit/View Responses (Activities); Edit the marketing activity; Delete; Delete (including Generated Record).

In this case we define a response to the survey marketing activity, we have defined.

7. Select **Define Responses** from the context menu. A pop-up window is displayed.

Note: The list of available responses are defined in the catalog entries for marketing activities. If no entries are present you get the catalog entries window and you have to define the response catalog entries in that window.

8. Select the responses you want to define and click **OK**. The responses are added to the graph view under marketing activity container.

Now you can further define the follow-up marketing activity to the responses defined above.

9. To define a follow-up marketing activity, select the **Define Follow-up Marketing Activity** from the context menu for the "**No Response**" container. The **New Follow-up Marketing Activity** window displays.

This window gives you the option to create a new follow-up marketing activity or use an existing one.

10. To create a new marketing activity or to reuse an existing one, perform the sub-steps described in step 5. In this case we add a follow-up marketing activity (**Survey Reminder**) to the **No Response** marketing activity.

11. Next we define the responses to the **Survey Reminder** follow-up marketing activity. Select **Define Responses** from the context menu. The **Responses (Survey Reminder)** window opens.

12. Select **Finished** and **No Response** options and click **OK**.

13. Next we want to send the survey reminder to those who have not responded. This loops the defined actions. To do this, select **Define Follow-up marketing activity** from the context menu of the **No Response** container.

14.Click **Use Existing** button.

Note: Since we want to send a survey reminder from the same campaign named "Questionnaire" we restrict the search content to the **Questionnaire** campaign. By changing the **Context** to **Entire Database** you can search for and add marketing activity from other Campaigns. To do that it is recommended that you use the **Re-use Marketing Activity** function described in step 5.

15.Click **Start Search** and select **Survey Reminder** from the search result.

16.Next a confirmation follow-up marketing activity is added to the **Finished Survey** activity. To do this select **Define Follow-up Marketing Activity** from the **Finished Survey** context menu. To create a new marketing activity, perform the sub-steps described in step 5. In this case we add a new follow-up marketing activity (**Confirmation**) to the **Finished Survey** activity.

Viewing a campaign

To view an existing campaign, perform the following:

1. Select **Campaigns** from the **Marketing** menu of CRM web.

2. The **Search Campaigns** window opens. Enter the required criteria and click **Search**. The search results displays the list of campaigns.

   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.

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4. Click **Save**. The Campaign Designer opens.

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   1. From the context menu select **Reuse Marketing Activity**. The **Reuse Marketing Activity** window opens.

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     - **Resp.Rep ID** – The ID of the rep responsible for the marketing activity.

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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:
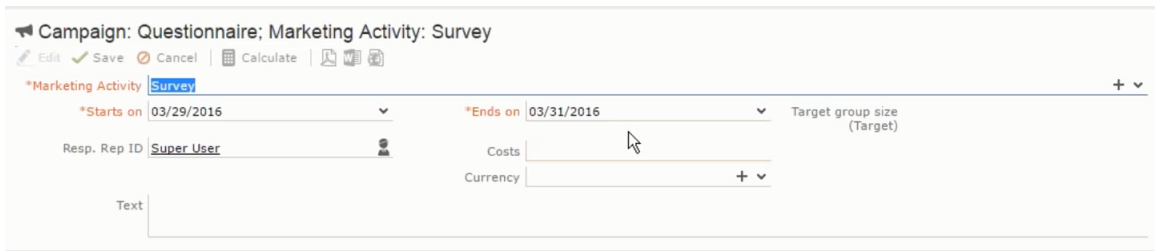
1. Open the required campaign in the campaign designer.

2. On the marketing activity container, click **OK** to expand the container.

The following screenshot shows the **Survey** marketing activity container.

The following is a brief description of the components of a marketing activity:

Channels - The first row shows the available channels of communication for a marketing activity. The following channels are available:

- Phone

- Letter

- Email

- SMS

• Fax

• In-person

The numbers in brackets besides each channel represents the number of target group entities that is processed using this channel.

Target Group – In this step you can define the target groups (customers etc) who are to be the participants of this marketing activity.

Execution – In this step, you can execute and start the marketing activity.

Responses – After the execution of the marketing you can evaluate the responses from participants.

3. Click on any of the channel icons to open the **Channel & Format Definition** window.

The channel and format definition process contains three phases: **Define Channel(s)** > **Define Format** > **Define Default Values** . The window opens on the **Define Channel(s)** phase.

- **Define Channels** – In this phase you can select the channels that are used to approach the customers for the marketing activities.
- **Define Format** – In this phase you can define the formats to be used for each of the channels you selected in the first phase. For example a template document for an email or fax, the fields that are used in the generation of a letter and similar formats for each of the required channels. The fields you want to include from different CRM info areas in the templates.
- **Define Default values** – You can define the default values for the marketing activities that are generated.

4. Provide the following information in the **Define Channel(s)** phase:

Format Definition

- **Format Name** – You can give a name to the format definition or retain the automatically generated name. This field is mandatory.
- **Lock** – Select this check box to lock the message format for the marketing activity.
- **Private** - Select this check box to keep the message generated for the marketing activity private.

Preferred Channels

- **Fixed** – You can select one fixed channel.

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.

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5. Click **Save Channel(s)**. Click **Proceed** to open the **Define Format** window.

The Define Format window opens with tabs for each of the channel you selected. You can define the information required for the message formats required for the selected channels by clicking each of the tabs.

Note: The Phone and In-Person channels do not require and further configuration information. The remaining channels Letter, Email, SMS, and Fax require further configuration information you can define in this window. The fields that are in Orange are mandatory fields. If you do not fill the mandatory fields then you can still save the channel format but you cannot execute the channel definition.

If you do not fill in a mandatory field and save the channel format, then if you go back to the Campaign designer you can see that the channels you selected is not green in color. See the screenshot below. The phone channel is in green color, but the Letter and Email channels are in grey.

6. Click on the Letter icon and it directly opens the Letter tab in the Define Format process step. Enter the format details of the channels including all the mandatory steps.

7. After providing the required information, click **Save Default Values**. Then click **Proceed** to move to the **Define Default Values** phase.

You provide a **Default Values Name** or use the automatically generated one. You can also search for and load a previously saved default values by using the **Load Default Values** button.

8. After entering the default values, click **Save Default Values** and then click **Proceed** to return to the campaign designer window.

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**.

and **Execution Definition** window.

You can create the target group and define execution type using the following buttons:

- New Query – Use this to create a target group using the Standard Query process.
- New Quick Query – Use this to create a target group using the Quick Query process.
- Load Query – Use this to search for and load a query that is already created and saved.
- Select/Rework Target Group – Use this to select a different target group or modify the target group.
- Define Execution Type – This allows you to define the dates until which the queries are executed to update the target group. You can also define the execution types.

If you were to start creating the target group, but stop in between and reopen this window it also shows the current query you were working on. It now have options to edit or unlink the current query from the marketing activity. For example:

the above screenshot shows the current query that was being worked on to create the target group. The flag icon indicates that the current query is a standard type query.

Avg.	= Sum total / number

	= read only

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.

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   3. Click **Save** to proceed to the next step, **Define Execution Type** window. In this window you can specify the following information:

      - Edit target group until – Specify the date until the target group can be updated based on the result of the query.

      - Execution Type – Select the execution type from the drop-down list.

   4. Click ▶ to open the **Create Target Group** step window.

If any of the items in the previous two steps are incomplete, you get warning messages. For example, if you had not defined the execution type and edit target group until date fields in the Define Execution Type window then Create Target Group window displays the incomplete steps as shown below. Also notice that the Create Target Group tab at the top has a red dot in it instead of a green dot.

5. Click **Create Target Group** to complete the creation of the target group process. A notification window along with some progress indicators are created as shown in the screenshot below.

   The Target Group icon is now orange in color to indicate that the target group creation is in progress. Also the Target Group row now has date until which the target group list can be updated. Once the target group is processed then the channels and target group icons has the target group numbers in the brackets besides the respective icons.

   Once the server creates the target group and updates the marketing activity is to be executed on the date specified. The icons is displayed in green. See the screenshot below.

6. To edit the target group click [icon]. 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 ([icon]) 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.

2. Select the Root Info Area from the dropdown list.

3. Click **Run Query**. The query results are listed. Click Finalize Query.

4. Define if the query results are Private Query or Public Query. Enter a name in **Save As …** field.

5. Click Save to finalize the results and attach the query results to this marketing activity. The Create Target Group window opens.

If any of the intermediate process steps are incomplete, you get a warning message, including if the target group is already created. A sample screenshot is provided below:

6. Click **Create Target Group** to complete creating the target group.

Selecting or modifying the target group

1. Open the required campaign in the campaign designer.

2. On the marketing activity container:

   • Click OK to expand the container.

   • Click the target group icon to open the **Target Group**

   • and **Execution Definition** window.

3. Click **Select/Rework Target Group**. The **Select/Rework Target Group** window displays.

4. You can search for marketing activities and select the desired marketing activity. The target group entities for the selected marketing activity are listed below.

5. Double click on the marketing activity to add the target group from the selected marketing activity to the target group of the current marketing activity. The Execution Definition window displays.

6. Specify the following information:

- **Edit target group until** – Specify the date until the target group can be updated.
- **Execution Type** – Select the execution type from the drop-down list.

7. Click Proceed. The campaign designer window opens.

8. Click 🔽 to view the newly added participant to the target group.

Defining Execution Type

To define an execution type, perform the following:

1. Open the required campaign in the campaign designer.

2. On the marketing activity container:

- Click OK to expand the container.

- Click the target group icon to open the **Target Group**

- and **Execution Definition** window.

3. Specify the following information:
   - **Edit target group until** – Specify the date until the target group can be updated.
   - **Execution Type** – Select the execution type from the drop-down list.

4. Click Proceed. The campaign designer window opens.

Executing a Marketing Activity

To execute a marketing activity, the following conditions should be met:

- All the selected channels and their formats should be defined. The selected channel icons would be green in color.
- The target groups should be defined. The Target group icons would be green in color.
- The current date should be within the scope of the start and end dates of the campaign.
- The "Edit target group until date" has to be defined. This date is visible besides the edit target group icon (🖭).

To execute a marketing activity, perform the following steps:

1. Open the required campaign in the campaign designer.

2. On the marketing activity container:

   • Click OK to expand the container.

   • The following screenshot shows the **Survey** marketing activity container.

3. Click the ▶ button on the **Execution** row. A query window pops up asking you to confirm the operation.

4. Click **OK**. A server notification informs you that the marketing activity has started and informs you when it is completed.

The Execute button is now greyed and the date on which the execution starts automatically is displayed in brackets besides it.

Note: The edit target group icon is now in red (🛰). The abort button is greyed out once the execution starts. And reset button is now activated. The Responses button remains grey until the all the participants have responded.

Editing/Viewing the Responses for a Marketing Activity

To edit or view the responses for a marketing activity, perform the following steps:

1. Click ↰ icon in the responses row. The Edit/View Response (Activities) window opens.

You can search for specific participants and view/edit their responses.

2. Select a row and click on Response 1 (Marketing Act.) column to activate and record the response.

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3. Click the drop-down list to select the response type. Click on the + button to add more response types to the response catalogue entries.

Edit the responses for all the participants.

4. Close the window to come back to the campaign manager window. The response icon is be green in color. This shows that response for all the participants is recorded.

Notice the "(2)" in the response containers for the Survey marketing activity: **Finished Survey** and **No Response** show. This indicates that two participants completed the survey and two members did not respond.

5. Click the button to expand the **Survey Reminder** follow-up marketing activity container for those participants who did not respond to the Survey.

You can see that two participants who did not respond are already added to the target group of the follow-up marketing activity.

6. Click to open the **Edit Target Group** window for the **Survey Reminder** follow-up marketing activity.

You can see that the two members with "No Response" in the **Response** column are listed.

Resetting the Marketing Activity Execution

Restarting a marketing activity is possible if the marketing activity execution is completed. It results in the following:

- All generated target group entities marked as "Generated" are deleted.
- The target group entities marked as "non Generated" are retained.
- The target group entities are regenerated based on the selection/query attached to this marketing activity.
- The target group entities that are marked as executed remains in the same state for the current target group.

To reset a marketing activity execution, perform the following:

1. Open the required campaign in the campaign designer.

2. On the marketing activity container, click to expand the container.

The following screenshot shows the **Survey** marketing activity container.

Notice that the execution button and the abort button are in grey. The reset button is in green and is active.

3. Click to reset the marketing activity execution. A confirmation window displays.

4. Click **OK**. The target group is reset and the target group is regenerated. The edit target group until date is reset.

Notice that the Target group button is yellow and once the target group generation is completed, the execution button is active and ready for execution. The colors of the target group icon and execute button are in green.

Notifying Reps about a marketing activity

To notify reps, perform the following:

1. From the context menu of a marketing activity container, select **Notify Rep**.

2. The Notify about record opens.

Enter the following information:

- **Recipients** – Add the internal and external recipients (reps) who receive the notification.
- **Subject** – Edit the subject of the notification email in this text field. You can also use the automatically generated subject.
- **Body** – Enter the notification content in the Body field.
- **Insert Aurea CRM web link** – Select this checkbox if you want to add the company URL in the notification.
- **Request a delivery receipt** – Select this checkbox if you want a receipt of delivery.
- **Request a read receipt** – Select this checkbox if you want to know if the notification was read by the recipient.

3. Click **Send** to send the notification to the selected reps.

Editing a Marketing Activity

To edit a marketing activity, perform the following:

1. Open the required campaign in the campaign designer.

2. From the context menu of a marketing activity container, select **Edit Marketing Activity**.

3. The marketing activity window opens.

4. Click Edit to start editing the marketing activity.

5. Make the required changes and click **Save**.

Defining Channels and Formats used in a Marketing Activity

To define the channels and formats for a marketing activity, perform the following steps:

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- **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.

The Define Format window opens with tabs for each of the channel you selected. You can define the information required for the message formats required for the selected channels by clicking each of the tabs.

Note: The Phone and In-Person channels do not require and further configuration information. The remaining channels Letter, Email, SMS, and Fax require further configuration information you can define in this window.

The fields that are in Orange are mandatory fields. If you do not fill the mandatory fields then you can still save the channel format but you cannot execute the channel definition.

If you do not fill in a mandatory field and save the channel format, then if you go back to the Campaign designer you can see that the channels you selected is not green in color. See the screenshot below. The phone channel is in green color, but the Letter and Email channels are in grey.

6. Click on the Letter icon and it directly opens the Letter tab in the Define Format process step. Enter the format details of the channels including all the mandatory steps.

7. After providing the required information, click **Save Default Values**. Then click **Proceed** to move to the **Define Default Values** phase.

You provide a **Default Values Name** or use the automatically generated one. You can also search for and load a previously saved default values by using the **Load Default Values** button.

8. After entering the default values, click **Save Default Values** and then click **Proceed**. You are returned to the campaign designer window.

Notice that the Phone and Letter channels icons are now in green.

Adding the Target Group and Execution Definition

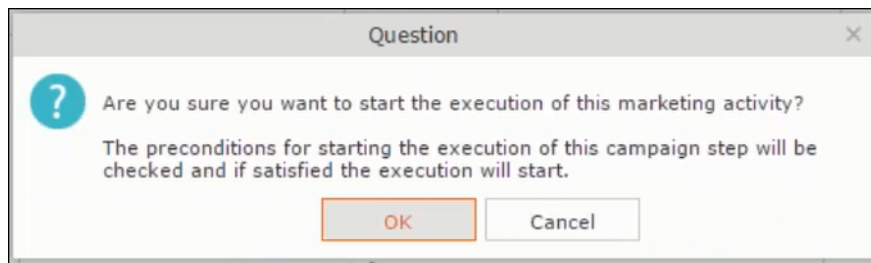To define the channels and formats for a marketing activity, perform the following steps:

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**.

and **Execution Definition** window.

You can create the target group and define execution type using the following buttons:

- New Query – Use this to create a target group using the Standard Query process.

- New Quick Query – Use this to create a target group using the Quick Query process.

- Load Query – Use this to search for and load a query that is already created and saved.

- Select/Rework Target Group – Use this to select a different target group or modify the target group.

- Define Execution Type – This allows you to define the dates until which the queries are executed to update the target group. You can also define the execution types.

If you were to start creating the target group, but stop in between and reopen this window it also shows the current query you were working on. It now have options to edit or unlink the current query from the marketing activity. For example:

the above screenshot shows the current query that was being worked on to create the target group. The flag icon indicates that the current query is a standard type query.

3. To create the target groups and define the execution type, perform one of the following:

  • Using the New Query button:

    1. Click New Query to open the standard New: Query window.

    2. Enter the **Query Name** and the **UQL syntax** for the query and run the query to get a list of entities for the target group. These are added to the target group.

    > **Note:** Instead of using an UQL, you can specify the infoarea, the fields to search, and the conditions by using the buttons in the Formatted and Conditions sections.

    3. Click **Save** to proceed to the next step, **Define Execution Type** window. In this window you can specify the following information:

      • Edit target group until – Specify the date until the target group can be updated based on the result of the query.

      • Execution Type – Select the execution type from the drop-down list.

4. Click to open the **Create Target Group** step window.

If any of the items in the previous two steps are incomplete, you get warning messages. For example, if you had not defined the execution type and edit target group until date fields in the Define Execution Type window then Create Target Group window displays the incomplete steps as shown below. Also notice that the Create Target Group tab at the top has a red dot in it instead of a green dot.

5. Click **Create Target Group** to complete the creation of the target group process. A notification window along with some progress indicators are created as shown in the screenshot below.

The Target Group icon is now orange in color to indicate that the target group creation is in progress. Also the Target Group row now has date until which the target group list can be updated. Once the target group is processed then the channels and target group icons has the target group numbers in the brackets besides the respective icons.

Once the server creates the target group and updates the marketing activity is to be executed on the date specified. The icons are displayed in green. See the screenshot below.

6. To edit the target group click [icon] . The Edit Target Group window opens. [icon]
   You can use the search queries to add more recipients to the target group.

Note: The target group icon turns Red ([icon]) 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.

2. Select the Root Info Area from the dropdown list.

3. Click **Run Query**. The query results are listed. Click Finalize Query.

4. Define if the query results are Private Query or Public Query. Enter a name in **Save As …** field.

5. Click Save to finalize the results and attach the query results to this marketing activity. The Create Target Group window opens.

If any of the intermediate process steps are incomplete, you get a warning message, including if the target group is already created. A sample screenshot is provided below:

6. Click **Create Target Group** to complete creating the target group.

Selecting or modifying the target group

1. Open the required campaign in the campaign designer.

2. On the marketing activity container:

- Click OK to expand the container.

- Click the target group icon to open the **Target Group**

- and **Execution Definition** window.

3. Click **Select/Rework Target Group**. The **Select/Rework Target Group** window displays.

4. You can search for marketing activities and select the desired marketing activity. The target group entities for the selected marketing activity are listed below.

5. Double click on the marketing activity to add the target group from the selected marketing activity to the target group of the current marketing activity. The Execution Definition window displays.

6. Specify the following information:

   • **Edit target group until** – Specify the date until the target group can be updated.

   • **Execution Type** – Select the execution type from the drop-down list.

7. Click Proceed. The campaign designer window opens.

8. Click 🔽 to view the newly added participant to the target group.

Defining Execution Type

To define an execution type, perform the following:

1. Open the required campaign in the campaign designer.

2. On the marketing activity container:

- Click OK to expand the container.

- Click the target group icon to open the **Target Group**

- and **Execution Definition** window.

3. Specify the following information:

- **Edit target group until** – Specify the date until the target group can be updated.

- **Execution Type** – Select the execution type from the drop-down list.

4. Click Proceed. The campaign designer window opens.

Executing a Marketing Activity

To execute a marketing activity, the following conditions should be met:

- All the selected channels and their formats should be defined. The selected channel icons would be green in color.

- The target groups should be defined. The Target group icons would be green in color.

- The current date should be within the scope of the start and end dates of the campaign.

- The "Edit target group until date" has to be defined. This date is visible besides the edit target group icon (⊡).

To execute a marketing activity, perform the following steps:

1. Open the required campaign in the campaign designer.

2. On the marketing activity container:

   - Click OK to expand the container.

   - The following screenshot shows the **Survey** marketing activity container.

3. Click the ▶ button on the **Execution** row. A query window pops up asking you to confirm the operation.

4. Click **OK**. A server notification informs you that the marketing activity has started and informs you when it is completed.

The Execute button is now greyed and the date on which the execution starts automatically is displayed in brackets besides it.

Note: The edit target group icon is now in red (🎯). The abort button is greyed out once the execution starts. And reset button is now activated. The Responses button remains grey until the all the participants have responded.

Editing/Viewing the Responses for a Marketing Activity

To edit or view the responses for a marketing activity, perform the following steps:

1. Click ↰ icon in the responses row. The Edit/View Response (Activities) window opens.

You can search for specific participants and view/edit their responses.

2. Select a row and click on Response 1 (Marketing Act.) column to activate and record the response.

3. Click the drop-down list to select the response type. Click on the + button to add more response types to the response catalogue entries.

Edit the responses for all the participants.

4. Close the window to come back to the campaign manager window. The response icon is be green in color. This shows that response for all the participants is recorded.

Notice the "(2)" in the response containers for the Survey marketing activity: **Finished Survey** and **No Response** show. This indicates that two participants completed the survey and two members did not respond.

5. Click the button to expand the **Survey Reminder** follow-up marketing activity container for those participants who did not respond to the Survey.

You can see that two participants who did not respond are already added to the target group of the follow-up marketing activity.

6. Click to open the **Edit Target Group** window for the **Survey Reminder** follow-up marketing activity.

You can see that the two members with "No Response" in the **Response** column are listed.

Resetting the Marketing Activity Execution

Restarting a marketing activity is possible if the marketing activity execution is completed. It results in the following:

- All generated target group entities marked as "Generated" are deleted.
- The target group entities marked as "non Generated" are retained.
- The target group entities are regenerated based on the selection/query attached to this marketing activity.
- The target group entities that are marked as executed remains in the same state for the current target group.

To reset a marketing activity execution, perform the following:

1. Open the required campaign in the campaign designer.
2. On the marketing activity container, click to expand the container.

The following screenshot shows the **Survey** marketing activity container.

Notice that the execution button and the abort button are in grey. The reset button is in green and is active.

3. Click to reset the marketing activity execution. A confirmation window displays.

4. Click **OK**. The target group is reset and the target group is regenerated. The edit target group until date is reset.

Notice that the Target group button is yellow and once the target group generation is completed, the execution button is active and ready for execution. The colors of the target group icon and execute button are in green.

Notifying Reps about a marketing activity

To notify reps, perform the following:

1. From the context menu of a marketing activity container, select **Notify Rep**.

2. The Notify about record opens.

Enter the following information:

- **Recipients** – Add the internal and external recipients (reps) who receive the notification.

- **Subject** – Edit the subject of the notification email in this text field. You can also use the automatically generated subject.

- **Body** – Enter the notification content in the Body field.

- **Insert Aurea CRM web link** – Select this checkbox if you want to add the company URL in the notification.

- **Request a delivery receipt** – Select this checkbox if you want a receipt of delivery.

- **Request a read receipt** – Select this checkbox if you want to know if the notification was read by the recipient.

3. Click **Send** to send the notification to the selected reps.

Editing a Marketing Activity

To edit a marketing activity, perform the following:

1. Open the required campaign in the campaign designer.

2. From the context menu of a marketing activity container, select **Edit Marketing Activity**.

3. The marketing activity window opens.

4. Click Edit to start editing the marketing activity.

5. Make the required changes and click **Save**.

Email Campaign Management

Email Campaign Management Using Aurea Campaign Manager (formerly called Lyris HQ)

As part of a campaign, the marketing activities can be carried out using multiple channels, like letters, fax, telephone, and email. Generally the email channel is the most preferred channel for marketing activities. While Aurea CRM provides its own email channel, it does not provide all the capabilities of a dedicated Email marketing solution. In order to provide a sophisticated email marketing channel Aurea CRM is integrated with Aurea Lyris HQ, a full-fledged Email marketing solution. Aurea CRM Enterprise edition users can use Lyris HQ to handle their email marketing activities and take full advantage of the sophisticated email marketing capabilities of Lyris HQ.

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.
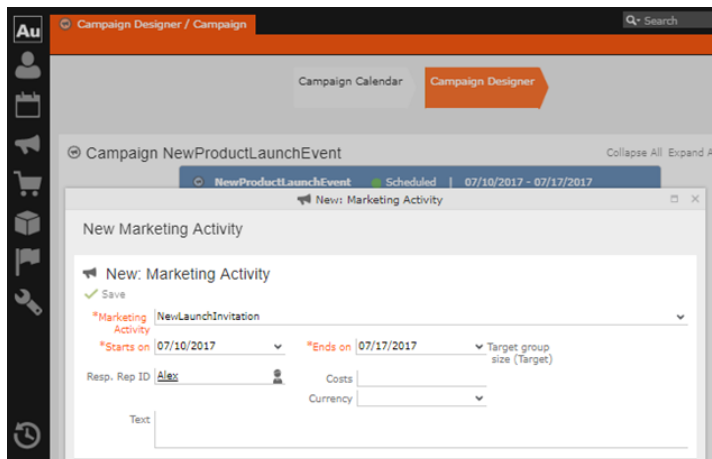
Transferring from the Campaign Designer

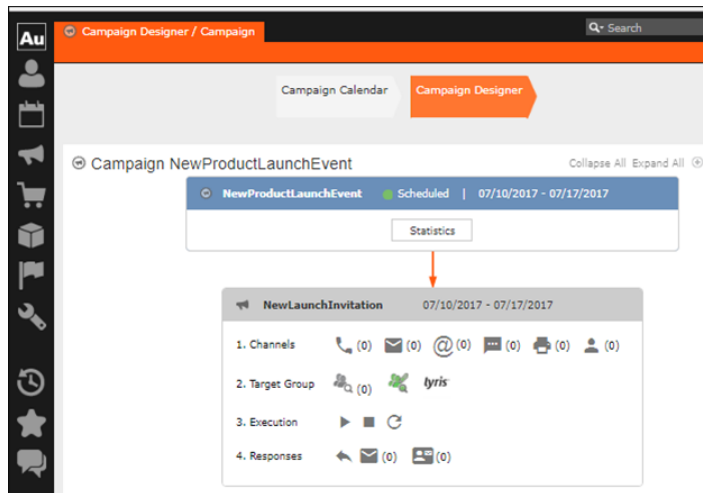To transfer a marketing activity to Lyris HQ from the campaign designer, perform the following:

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.
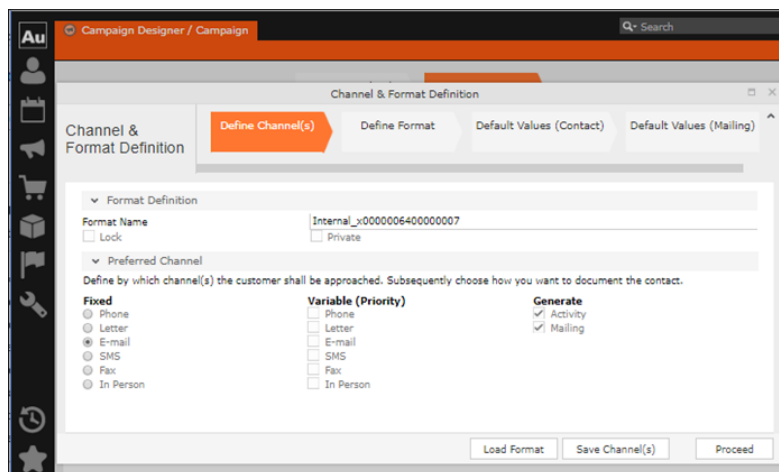

2. From the campaign container context menu select New Marketing Activity. The New Marketing Activity window displays.

3. Enter the required details. In this example we create a NewLaunchInvitation as the Marketing Activity.

4. Click Save to create the new marketing activity container in the campaign designer.
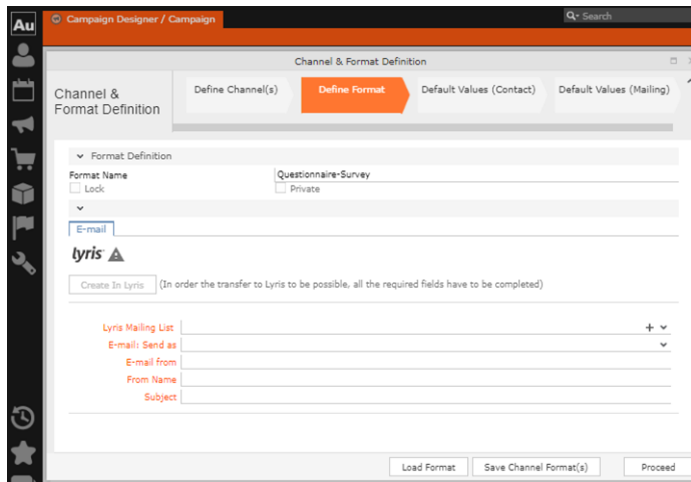

5. Click (email channel). The Channel & Format Definition page displays.

a. Select the E-mail channel radio button under the Fixed column.

b. Select the Activity and Mailing options under the Generate column. These are optional.

Note: If you wish to use multiple channels for the marketing activity, you can select the E-mail checkbox along with other required channels under the Variable (Priority) column.

6. Click Save Channel(s).

7. Click Proceed, to go to the format definition phase. The Define Format page displays.
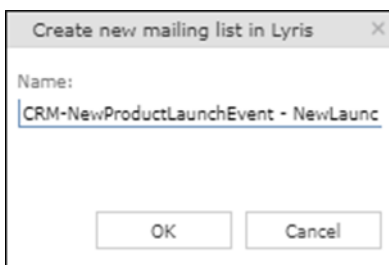

You can see that Lyris Email channel definition page is available. If Lyris is not enabled then the standard email channel definition page would be visible. Contact your CRM administrator to enable the Lyris email marketing channel.

8. Populate the fields as described below. These fields are mandatory in order to transfer the marketing activity to Lyris.

Note: The Create in Lyris button is activated once all the fields are populated and the channel format is saved.

- Lyris Mailing List:Click to get a drop-down list of mailing lists in Lyris. Select the required mailing list. You can also create a new mailing list. To create a new mailing list, perform the following:

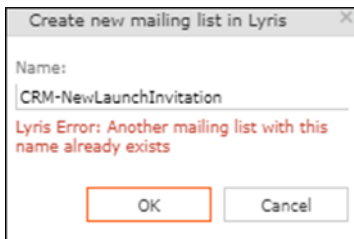   1. Click +. The Create new mailing list in Lyris dialog displays.

   A default name (CRM-NewProductLaunchEvent - NewLaunchInvitation) is provided which is a concatenation of three names: default mailing list prefix configured in the CRM Designer (CRM-) + the campaign name (NewProductLaunchEvent) + the marketing activity name (NewLaunchInvitation).

In case the marketing activity does not belong to a campaign then the prefix and the activity name is used. For this example, CRM-NewLaunchInvitation. You can rename it to a desired name. In this example, we change the name to CRM- NewLaunchInvitation**.**

2. Click OK. A new blank mailing list is created in Lyris.

If for some reason the mailing list could not be created in Lyris then the dialog displays the appropriate error message. For example, the following screenshot shows the error message that a mailing with the same name already exists.
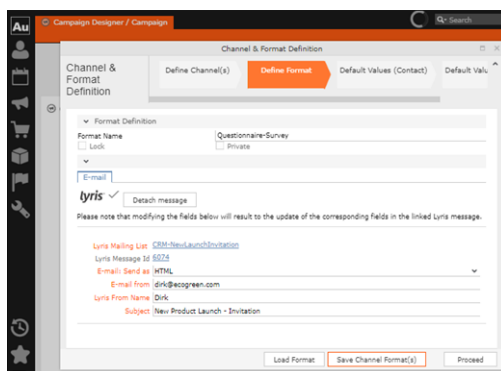

- **E-mail: Send as**: Select the desired format of the email you wish to send: HTML or Text
- **E-mail From**: Enter the email address of the marketing email sender.
- **From Name**: Enter the name of the sender.
- **Subject**: Enter the subject for the email.

Note: The above fields are used as properties of the email messages that are created in Lyris.

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9. Click Save Channel Format(s). After the channel format is saved, the Create in Lyris button gets activated.

10. Click Create in Lyris.

A dummy message is created in Lyris for the marketing activity. Depending on your selection for the E-mail Send as field the dummy message is a text or HTML message. A tick appears besides the *lyris* icon on successful creation of the message. And a Detach message button displays. The ids for the mailing list and message created in Lyris are displayed along with the links to the instances in Lyris. See the screenshot below.

Click Detach Message to delete the message created in Lyris. Once the message is detached, all the attributes of the message are cleared, including the links in the Lyris Message ID and Lyris Mailing List fields. The corresponding message created in Lyris is also deleted. If the message is already sent then any responses received for the message are ignored by Lyris and Aurea CRM does not get any event corresponding to the message.
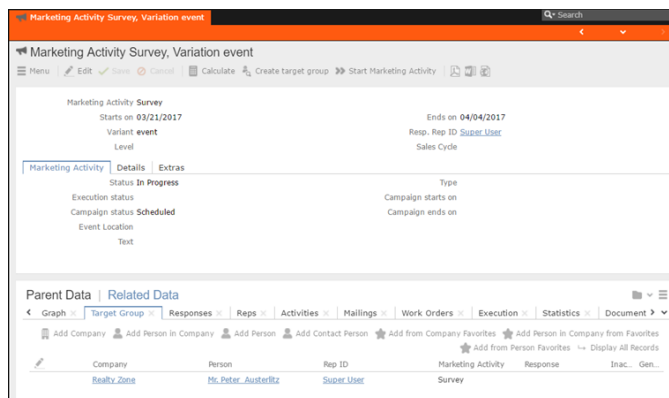
11. Click Save Channel Format(s).

12. Click Proceed.

Transferring from the Standard Editor

If you prefer to use the standard editor for creating marketing activities instead of the Campaign Designer, you can still transfer a marketing activity to Lyris from the standard editor.

To transfer a marketing activity from the standard editor to Lyris, perform the following:

1. Select Marketing > Marketing Activities from the CRM menu. The Search Marketing activities page displays.

2. Enter the search filters and click Start Search. The search results list displays.

3. Open the context menu of the required marketing activity from the result list and select Tab View or Tree View. The Marketing Activity window displays.

Note: Double clicking a marketing activity from the result list opens the marketing activity in the campaign designer.

4. Select Create Marketing Activity Format from the context menu. The Marketing Activity Format window displays.

5. Select the preferred channel. Click the E-mail radio button under Fixed, then click the Email tab.

You should see the Lyris Email channel definition page. If Lyris is not enabled then the standard email channel definition page would be visible. Contact your CRM administrator to enable the Lyris email marketing channel.

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.

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.

2. From the campaign container context menu select New Marketing Activity. The New Marketing Activity window displays.

3. Enter the required details. In this example we create a NewLaunchInvitation as the Marketing Activity.

4. Click Save to create the new marketing activity container in the campaign designer.

5. Click (email channel). The Channel & Format Definition page displays.

a. Select the E-mail channel radio button under the Fixed column.

b. Select the Activity and Mailing options under the Generate column. These are optional.

Note: If you wish to use multiple channels for the marketing activity, you can select the E-mail checkbox along with other required channels under the Variable (Priority) column.

6. Click Save Channel(s).

7. Click Proceed, to go to the format definition phase. The Define Format page displays.

You can see that Lyris Email channel definition page is available. If Lyris is not enabled then the standard email channel definition page would be visible. Contact your CRM administrator to enable the Lyris email marketing channel.

8. Populate the fields as described below. These fields are mandatory in order to transfer the marketing activity to Lyris.

Note: The Create in Lyris button is activated once all the fields are populated and the channel format is saved.

- Lyris Mailing List:Click to get a drop-down list of mailing lists in Lyris. Select the required mailing list. You can also create a new mailing list. To create a new mailing list, perform the following:

  1. Click +. The Create new mailing list in Lyris dialog displays.

  A default name (CRM-NewProductLaunchEvent - NewLaunchInvitation) is provided which is a concatenation of three names: default mailing list prefix configured in the CRM Designer (CRM-) + the campaign name (NewProductLaunchEvent) + the marketing activity name (NewLaunchInvitation).

  In case the marketing activity does not belong to a campaign then the prefix and the activity name is used. For this example, CRM-NewLaunchInvitation.

  You can rename it to a desired name. In this example, we change the name to CRM- NewLaunchInvitation.

  2. Click OK. A new blank mailing list is created in Lyris.

If for some reason the mailing list could not be created in Lyris then the dialog displays the appropriate error message. For example, the following screenshot shows the error message that a mailing with the same name already exists.

- **E-mail: Send as**: Select the desired format of the email you wish to send: HTML or Text
- **E-mail From**: Enter the email address of the marketing email sender.
- **From Name**: Enter the name of the sender.
- **Subject**: Enter the subject for the email.

Note: The above fields are used as properties of the email messages that 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.

Note: Double clicking a marketing activity from the result list opens the marketing activity in the campaign designer.

4. Select Create Marketing Activity Format from the context menu. The Marketing Activity Format window displays.

5. Select the preferred channel. Click the E-mail radio button under Fixed, then click the Email tab.

You should see the Lyris Email channel definition page. If Lyris is not enabled then the standard email channel definition page would be visible. Contact your CRM administrator to enable the Lyris email marketing channel.

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

Making changes to the marketing activity transferred to Lyris

When you modify and save the message details of a marketing activity that is already transferred to Lyris, the changes are automatically transferred to the corresponding Lyris instance of the marketing activity's message.

For example, in the screenshots below, the E-mail from, Lyris From Name and Subject field values are changed and the channel format is saved. The screenshots of Lyris show the changes reflected in the corresponding fields of the message.

The values are changed from **dirk@ecogreen.com**, Dirk, and "New Product Launch Invitation" to **maya@ecogreen.com**, Maya, and "New Product Launch Event – Ecogreen" respectively. The corresponding changes are reflected in the Lyris message.

Note: Automatic transfer of changes to Lyris can take some time.

Transferring 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:

1. **Pick CRM Fields**—select the CRM fields listed for the info areas. These fields are added as attributes of a contact that is created in Lyris for each of the target group members transferred to Lyris. The CRM fields are limited to the following infoareas:

   - Company (FI)
   - Contact Person (CP)
   - Person (PE)
   - Person in Company (KP)

2. **Map CRM fields**—the fields selected in the first step are mapped to equivalent demographics present in Lyris or new demographics can be created and added to the Lyris demographics.

3. **Create Segment**—associate the target group with a segment in Lyris. This is important because multiple marketing activities can use the same mailing list.

And segments enables you to identify the mailing list members in the context of a marketing activity.

4. **Overview**—this phase displays the number of active target group entities that are eligible to be transferred to Lyris.

5. **Schedule Transfer**—this phase schedules the transfer and ensures that the transfer process remains active until all the entities are transferred to Lyris. For example, if a connection time out happens during the transfer to Lyris, then CRM would try again at a later time until the transfer is complete.

On transferring a target group, an instance for each of the target group member is created in Lyris, using their email contact and demographic details. The target group members are then added as participants to the corresponding mailing list created in Lyris. Aurea CRM ensures the inclusion of the target group members to the segment created in Lyris. You can transfer a target group to Lyris HQ from the campaign designer or from the standard editor for marketing activities

Transferring from the Campaign designer

To transfer a target group for a marketing activity to CRM designer:

1. Open the marketing activity in the campaign designer.

2. Click in the Target Group row. The Transfer Target Group to Lyris page displays.

3. Click the Pick CRM Fields tab. To select the required CRM fields to be included as attributes for the contacts in the target group, perform the following:

   a. Select the required Infoarea from the Info Area dropdown list.

   b. Click the check box to select the required field from each infoarea. You can search for specific fields by typing the field name in the Search Field Name filter. You can sort the displayed fields by name or type by clicking the respective field headers: Field Name or Field Type.

   c. Repeat the above steps to select the required fields from different infoareas.

The following fields from the infoareas are not displayed:

- The SeqNo, and StatNo fields.
- The fields for which the user does not have view rights.
- The fields containing email addresses. They are automatically transferred.

4. Click Proceed. The Map CRM fields tab gets activated and the following message displays: *Please wait until the mappings between CRM fields and Lyris demographic mappings are loaded...*

   Aurea CRM communicates with 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:

   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.

d. Click OK. The new demographic is created in Lyris.

e. To view the mapped demographic attributes in Lyris, open Attributes tab and select the required mailing list from the List filter. The Attribute column should show the list of mapped attributes from CRM. See the screenshot below.

5. Click Proceed. The Create Segment tab displays.

6. Click Create Segment. A segment for this mailing list is created in Lyris.

   The name of the segment created in Lyris is displayed. Clicking the named URL opens the required Lyris segment in a new tab. The name generated is a concatenation of the name and the record id of the marketing activity.

   When the segment for this target group is created in Lyris, it generates the Segment generated event. You can view the segment information in the Segment tab of the Edit/View Target group window.

7. Click Proceed. The Overview tab displays.

   The number of active target group entities that are eligible to be transferred to Lyris is mentioned.

> **Note:** If there are no target group entities for the email channel available to be transferred to Lyris, then a message "*No target group entities are eligible to be transferred to Lyris*" is displayed. You should go back and create the target group.

8. Click Proceed. The Schedule Transfer tab displays.

9. Click Schedule Target Group Transfer. A tick mark appears signifying that the transfer process is scheduled.

10. To check the status of the transfer, open the Collaboration > To-Dos menu and search for the required scheduled activity. The status of the scheduled transfer should be visible. The following screenshot shows the status of the transfer is In Progress.

The transfer status changes to Completed, once the target group is transferred successfully.

11. To view the details of the transfer process, open the scheduled entity from the To-Do search list. The Related Data tab contains a link to a text file that contains information about the target group transfer process.

Open the document to find the information on the transfer process.

12. You can check the contacts created in Lyris for the transferred target group members. To list the contacts in Lyris and view the contact details created, perform the following:

   a. Open the Contacts tab and select the mailing list from the List filter. The contacts created for his mailing list is displayed.

   b. Click View to open the details of the contact generated. The View Contacts dialog displays.

   The field values of the mapped fields are transferred from CRM and populated in the corresponding mapped demographics in Lyris

Transferring from the Standard Editor

If you prefer to use the standard editor for creating marketing activities instead of the Campaign Designer, you can still transfer a marketing activity to Lyris from the standard editor.

To transfer a marketing activity from the standard editor to Lyris, perform the following:

1. Select Marketing > Marketing Activities from the CRM menu. The Search Marketing activities page displays.

2. Enter the search filters and click **Start Search**. The search results list displays.

3. Open the context menu of the required marketing activity from the result list and select **Tab View** or **Tree View**. The **Marketing Activity window** displays.

Note: Double clicking a marketing activity from the result list opens the marketing activity in the campaign designer.

4. Select **Related Data** > **Target Group** tab.

5. If there are no items listed in the Target Group Tab, click on the **Create Target Group** link.

6. Once your target group is defined, click the Transfer Target Group to Lyris link. The Transfer Target Group to Lyris page displays.

7. The rest of the steps to transfer the target to Lyris from the standard editor is similar to the way the target group is transferred from the Campaign Designer. Perform the steps 3 to 12 as described in the topic Transferring from the Campaign designer on page 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.

As visible in the screenshot above, a new member (Travis Conners) is added to the target group. The user is automatically added to the corresponding mailing list participants on Lyris, as shown in the screenshot below.

As you can see the new person is added to the list of active participants in the corresponding mailing list.

Deleting a member from the target group

If you delete a member from the target group on Aurea CRM, the corresponding mailing list member in Lyris is moved from **Active members** to the **Admin Trash** list.

Member **Marie Cole** is deleted from the target group.

Member Marie Cole is moved from **Active Members** list to **Admin Trash** list.

Activating or deactivating a target group entity

Deactivating a target group member in Aurea CRM, moves the corresponding member record to the unsubscribed list in Lyris. The following screenshot shows the person entity (Travis Conners) deactivated (**Inactive**) in **Edit Target Group** window.

The corresponding entity is now moved to the unsubscribed list of member records in Lyris.

Similarly, activating an inactive member in the **Edit Target Group** window, moves the member record in Lyris from the **Unsubscribed** list to the **Active Members** list.

Changing the attributes of a target group entity

If the attribute of a target group member already transferred to Lyris is changed, the changes are automatically transferred to Lyris.

In the following screenshots the last name of person entity Conner is changed to Smith, and his email id is changed to the same is reflected in Lyris.

The corresponding changes to the member record in Lyris is shown in the screenshot below.

Transferring from the Campaign designer

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20

Campaign Management (Enterprise CRM) – LSI and FSI

Learn to design and manage marketing campaign in Aurea CRM.

Campaign Management (Enterprise CRM) overview

The Campaign designer allows you to quickly create a campaign in an intuitive way and uses a graphical representation to make the campaign design process simple.

You can create campaigns and their marketing activities with clear representation of the works flows involved. Campaigns, marketing activities, and response are represented as containers in the graphical view.

Note: Campaign management is an enterprise feature, you need to have enterprise license for Aurea CRM to use this feature.

Components of the Campaign Management:

- Campaign calendar
- Campaign Designer

Working with Campaign Calendar

The campaign calendar shows all the campaigns and marketing activities.

You can start a new campaign from this window by clicking the Create New Campaign button. You can also select and open a campaign shown in this window to open it in the campaign designer.

The following screenshot shows a campaign calendar.

The campaign calendar tab at the top is visible when you open any campaign.

Working with Campaign Designer

You can create, edit, and delete campaigns and their marketing activities in the campaign designer.

You can create a new campaign using an existing campaign as a template or create a new campaign from scratch.

Creating a new campaign from scratch

To create a new campaign from scratch, perform the following steps:

1. Click the Marketing menu icon, and select **New Campaign** from the menu.

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.

- To use an existing marketing activity:

  1. From the context menu select **Reuse Marketing Activity**. The **Reuse Marketing Activity** window opens. ✓ Proceed

  2. Search for the marketing activities from a campaign and select it from the search list.

  3. Enter a New Start Date for the marketing activity, in the resulting window.

  > **Note:** If you do not provide a start date for the marketing activity then the start date on the reused marketing activity is used as start date.

  4. Click OK. The marketing activity and its descendent marketing activities are added to the campaign designer.

  5. Next you can make further additions to the marketing activity.

- To create a new marketing activity:

  1. From the context menu select **New Marketing Activity**. The **New Marketing Activity** window opens.

2. Enter the following details for the new marketing activity:

   • **Marketing activity** – Select the marketing activity type from the following: Confirmation, Event, Follow-up, Invitation, Survey, Survey-remainder. (Mandatory field)

   • **Starts on** – The start date for the marketing activity.

   • **Ends-on** – The end date for the marketing activity.

   • **Resp.Rep ID** – The ID of the rep responsible for the marketing activity.

   • **Costs** – The estimated cost of the marketing activity.

   • **Currency** – Select the currency the cost is estimated in.

   • **Text** – Provide a description and other relevant information in this text field.

3. Click **Save** to create the new marketing activity container in the campaign

   designer.

Note: A blue arrow points from the campaign container to the marketing activity container.

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4. In the next step you need to define some responses for this marketing activity.

6. The context menu for the marketing activity container allows you to perform the following: Define responses, Channel and Format definition; Target group and Execution definition; Edit Target group; Notify Rep; Edit/View Responses (Activities); Edit the marketing activity; Delete; Delete (including Generated Record).

   In this case we define a response to the survey marketing activity, we have defined.

7. Select **Define Responses** from the context menu. A pop-up window is displayed.

Note: The list of available responses are defined in the catalog entries for marketing activities. If no entries are present you get the catalog entries window and you have to define the response catalog entries in that window.

8. Select the responses you want to define and click **OK**. The responses are added to the graph view under marketing activity container.

Now you can further define the follow-up marketing activity to the responses defined above.

9. To define a follow-up marketing activity, select the **Define Follow-up Marketing Activity** from the context menu for the "**No Response**" container. The **New Follow-up Marketing Activity** window displays.

This window gives you the option to create a new follow-up marketing activity or use an existing one.

10. To create a new marketing activity or to reuse an existing one, perform the sub-steps described in step 5. In this case we add a follow-up marketing activity (**Survey Reminder**) to the **No Response** marketing activity.

11. Next we define the responses to the **Survey Reminder** follow-up marketing activity. Select **Define Responses** from the context menu. The **Responses (Survey Reminder)** window opens.

12. Select **Finished** and **No Response** options and click **OK**.

13. Next we want to send the survey reminder to those who have not responded. This loops the defined actions. To do this, select **Define Follow-up marketing activity** from the context menu of the **No Response** container.

14. Click **Use Existing** button.

> **Note:** Since we want to send a survey reminder from the same campaign named "Questionnaire" we restrict the search content to the **Questionnaire** campaign. By changing the **Context** to **Entire Database** you can search for and add marketing activity from other Campaigns. To do that it is recommended that you use the **Re-use Marketing Activity** function described in step 5.

15. Click **Start Search** and select **Survey Reminder** from the search result.

16. Next a confirmation follow-up marketing activity is added to the **Finished Survey** activity. To do this select **Define Follow-up Marketing Activity** from the **Finished Survey** context menu. To create a new marketing activity, perform the sub-steps described in step 5. In this case we add a new follow-up marketing activity (**Confirmation**) to the **Finished Survey** activity.

Viewing a campaign

To view an existing campaign, perform the following:

1. Select **Campaigns** from the **Marketing** menu of CRM web.

2. The **Search Campaigns** window opens. Enter the required criteria and click **Search**. The search results displays the list of campaigns.

   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.

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- **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.

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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.

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   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.

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> **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.

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3. Click **Save** to create the new marketing activity container in the campaign

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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 .

3. Defining the execution definition, see .

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.

The following screenshot shows the **Survey** marketing activity container.

The following is a brief description of the components of a marketing activity:

Channels - The first row shows the available channels of communication for a marketing activity. The following channels are available:

• Phone

• Letter

• Email

- SMS

- Fax

- In-person

The numbers in brackets besides each channel represents the number of target group entities that is processed using this channel.

Target Group – In this step you can define the target groups (customers etc) who are to be the participants of this marketing activity.

Execution – In this step, you can execute and start the marketing activity.

Responses – After the execution of the marketing you can evaluate the responses from participants.

3. Click on any of the channel icons to open the **Channel & Format Definition** window.

The channel and format definition process contains three phases: **Define Channel(s)** > **Define Format** > **Define Default Values** . The window opens on the **Define Channel(s)** phase.

- **Define Channels** – In this phase you can select the channels that are used to approach the customers for the marketing activities.

- **Define Format** – In this phase you can define the formats to be used for each of the channels you selected in the first phase. For example a template document for an email or fax, the fields that are used in the generation of a letter and similar formats for each of the required channels. The fields you want to include from different CRM info areas in the templates.

- **Define Default values** – You can define the default values for the marketing activities that are generated.

4. Provide the following information in the **Define Channel(s)** phase:

Format Definition

- **Format Name** – You can give a name to the format definition or retain the automatically generated name. This field is mandatory.

- **Lock** – Select this check box to lock the message format for the marketing activity.

- **Private** - Select this check box to keep the message generated for the marketing activity private.

Preferred Channels

- **Fixed** – You can select one fixed channel.

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.

The Define Format window opens with tabs for each of the channel you selected. You can define the information required for the message formats required for the selected channels by clicking each of the tabs.

Note: The Phone and In-Person channels do not require and further configuration information. The remaining channels Letter, Email, SMS, and Fax require further configuration information you can define in this window. The fields that are in Orange are mandatory fields. If you do not fill the mandatory fields then you can still save the channel format but you cannot execute the channel definition.

If you do not fill in a mandatory field and save the channel format, then if you go back to the Campaign designer you can see that the channels you selected is not green in color. See the screenshot below. The phone channel is in green color, but the Letter and Email channels are in grey.

6. Click on the Letter icon and it directly opens the Letter tab in the Define Format process step. Enter the format details of the channels including all the mandatory steps.

7. After providing the required information, click **Save Default Values**. Then click **Proceed** to move to the **Define Default Values** phase.

You provide a **Default Values Name** or use the automatically generated one. You can also search for and load a previously saved default values by using the **Load Default Values** button.

8. After entering the default values, click **Save Default Values** and then click **Proceed** to return to the campaign designer window.

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**.

and **Execution Definition** window.

You can create the target group and define execution type using the following buttons:

- New Query – Use this to create a target group using the Standard Query process.
- New Quick Query – Use this to create a target group using the Quick Query process.
- Load Query – Use this to search for and load a query that is already created and saved.
- Select/Rework Target Group – Use this to select a different target group or modify the target group.
- Define Execution Type – This allows you to define the dates until which the queries are executed to update the target group. You can also define the execution types.

If you were to start creating the target group, but stop in between and reopen this window it also shows the current query you were working on. It now have options to edit or unlink the current query from the marketing activity. For example:

the above screenshot shows the current query that was being worked on to create the target group. The flag icon indicates that the current query is a standard type query.

Avg. = Sum total / number   = read only

3. To create the target groups and define the execution type, perform one of the following:

- Using the New Query button:

  1. Click New Query to open the standard New: Query window.

  2. Enter the **Query Name** and the **UQL syntax** for the query and run the query to get a list of entities for the target group. These are added to the target group.

  ***

  Note: Instead of using an UQL, you can specify the infoarea, the fields to search, and the conditions by using the buttons in the Formatted and Conditions sections.

  ***

  3. Click **Save** to proceed to the next step, **Define Execution Type** window. In this window you can specify the following information:

  - Edit target group until – Specify the date until the target group can be updated based on the result of the query.

  - Execution Type – Select the execution type from the drop-down list.

  4. Click ▶ to open the **Create Target Group** step window.

If any of the items in the previous two steps are incomplete, you get warning messages. For example, if you had not defined the execution type and edit target group until date fields in the Define Execution Type window then Create Target Group window displays the incomplete steps as shown below. Also notice that the Create Target Group tab at the top has a red dot in it instead of a green dot.

5. Click **Create Target Group** to complete the creation of the target group process. A notification window along with some progress indicators are created as shown in the screenshot below.

The Target Group icon is now orange in color to indicate that the target group creation is in progress. Also the Target Group row now has date until which the target group list can be updated. Once the target group is processed then the channels and target group icons has the target group numbers in the brackets besides the respective icons.

Once the server creates the target group and updates the marketing activity is to be executed on the date specified. The icons is displayed in green. See the screenshot below.

6. To edit the target group click . The Edit Target Group window opens.
You can use the search queries to add more recipients to the target group.

Note: The target group icon turns Red ( ) after the "Until" date.

- To create the target groups and define the execution type using the New Quick Query option, perform one of the following:

  1. Click the New Quick Query button from the Target Group & Execution Definition window. The Create Target Group using Quick Query window is opened.

2. Select the Root Info Area from the dropdown list.

3. Click **Run Query**. The query results are listed. Click Finalize Query.

4. Define if the query results are Private Query or Public Query. Enter a name in **Save As …** field.

5. Click Save to finalize the results and attach the query results to this marketing activity. The Create Target Group window opens.

If any of the intermediate process steps are incomplete, you get a warning message, including if the target group is already created. A sample screenshot is provided below:

6. Click **Create Target Group** to complete creating the target group.

Selecting or modifying the target group

1. Open the required campaign in the campaign designer.
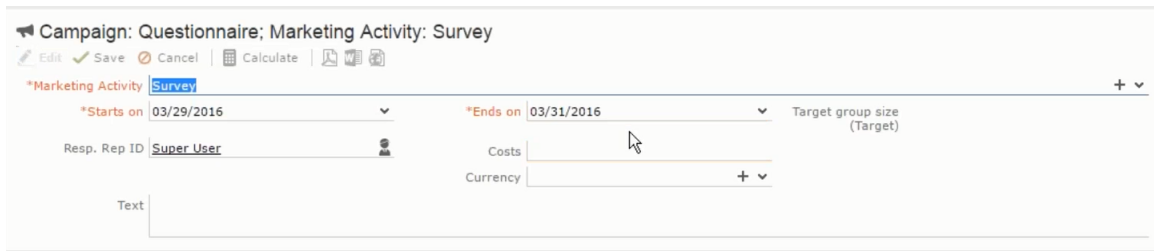2. On the marketing activity container:
   - Click OK to expand the container.

   - Click the target group icon to open the **Target Group**

   - and **Execution Definition** window.

3. Click **Select/Rework Target Group**. The **Select/Rework Target Group** window displays.

4. You can search for marketing activities and select the desired marketing activity. The target group entities for the selected marketing activity are listed below.

5. Double click on the marketing activity to add the target group from the selected marketing activity to the target group of the current marketing activity. The Execution Definition window displays.

6. Specify the following information:

   • **Edit target group until** – Specify the date until the target group can be updated.

   • **Execution Type** – Select the execution type from the drop-down list.

7. Click Proceed. The campaign designer window opens.

8. Click ⬇ to view the newly added participant to the target group.

Defining Execution Type

To define an execution type, perform the following:

1. Open the required campaign in the campaign designer.

2. On the marketing activity container:

- Click OK to expand the container.

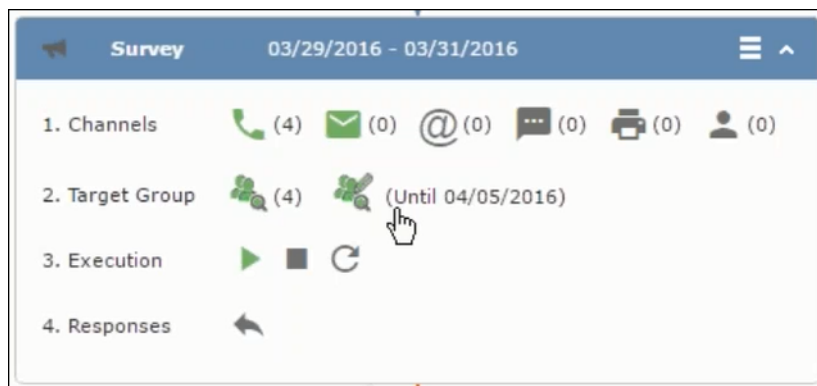- Click the target group icon to open the **Target Group**

- and **Execution Definition** window.

3. Specify the following information:

- **Edit target group until** – Specify the date until the target group can be updated.
- **Execution Type** – Select the execution type from the drop-down list.

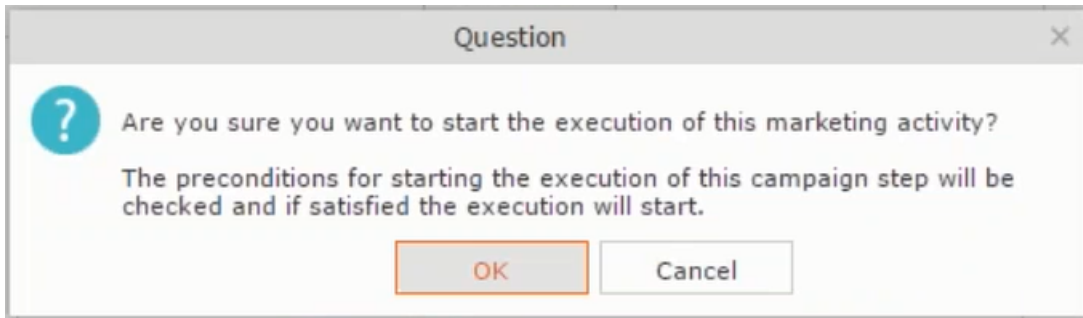4. Click Proceed. The campaign designer window opens.

Executing a Marketing Activity

To execute a marketing activity, the following conditions should be met:
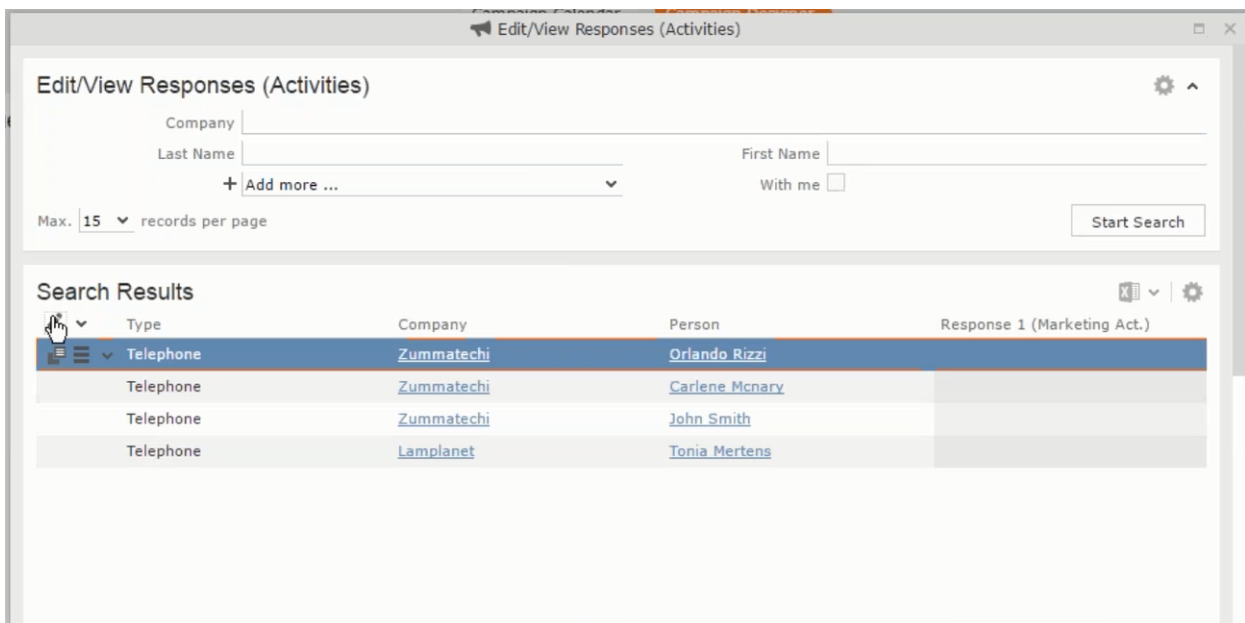
- All the selected channels and their formats should be defined. The selected channel icons would be green in color.
- The target groups should be defined. The Target group icons would be green in color.
- The current date should be within the scope of the start and end dates of the campaign.
- The "Edit target group until date" has to be defined. This date is visible besides the edit target group icon (🖭).

To execute a marketing activity, perform the following steps:
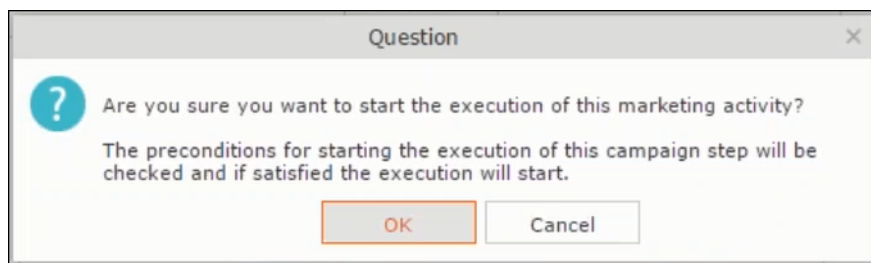
1. Open the required campaign in the campaign designer.
2. On the marketing activity container:
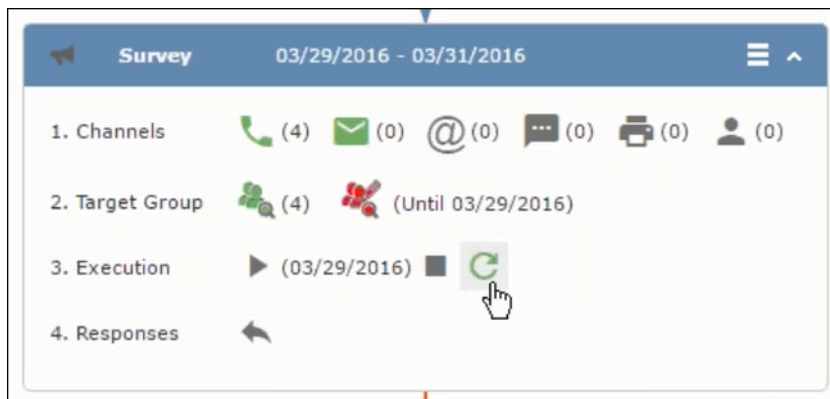   - Click OK to expand the container.

   - The following screenshot shows the **Survey** marketing activity container.

3. Click the ▶ button on the **Execution** row. A query window pops up asking you to confirm the operation.

4. Click **OK**. A server notification informs you that the marketing activity has started and informs you when it is completed.
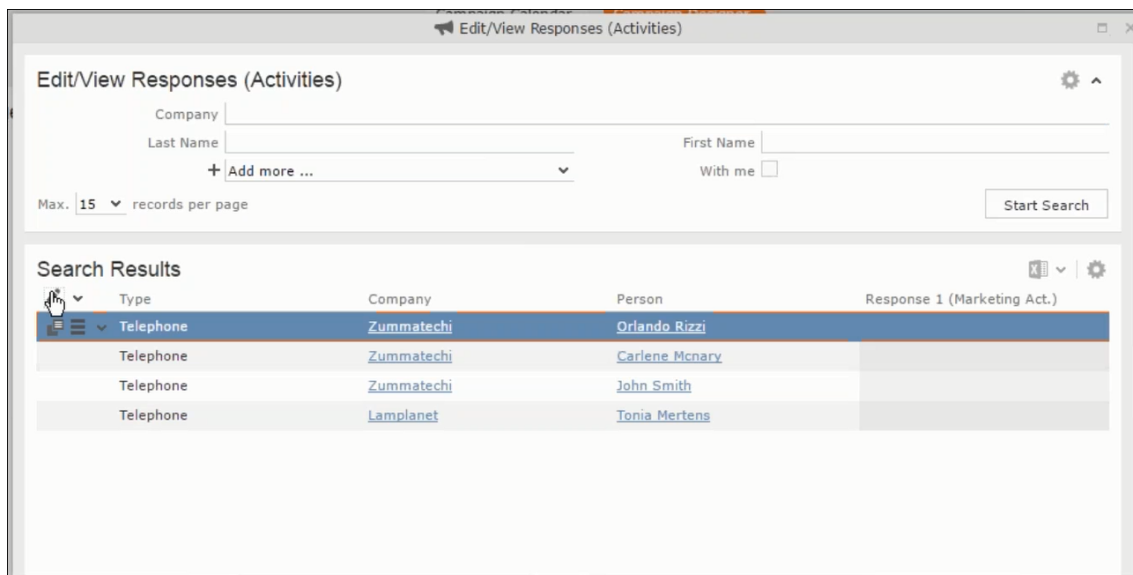
The Execute button is now greyed and the date on which the execution starts automatically is displayed in brackets besides it.

Note: The edit target group icon is now in red ( ). The abort button is greyed out once the execution starts. And reset button is now activated. The Responses button remains grey until the all the participants have responded.

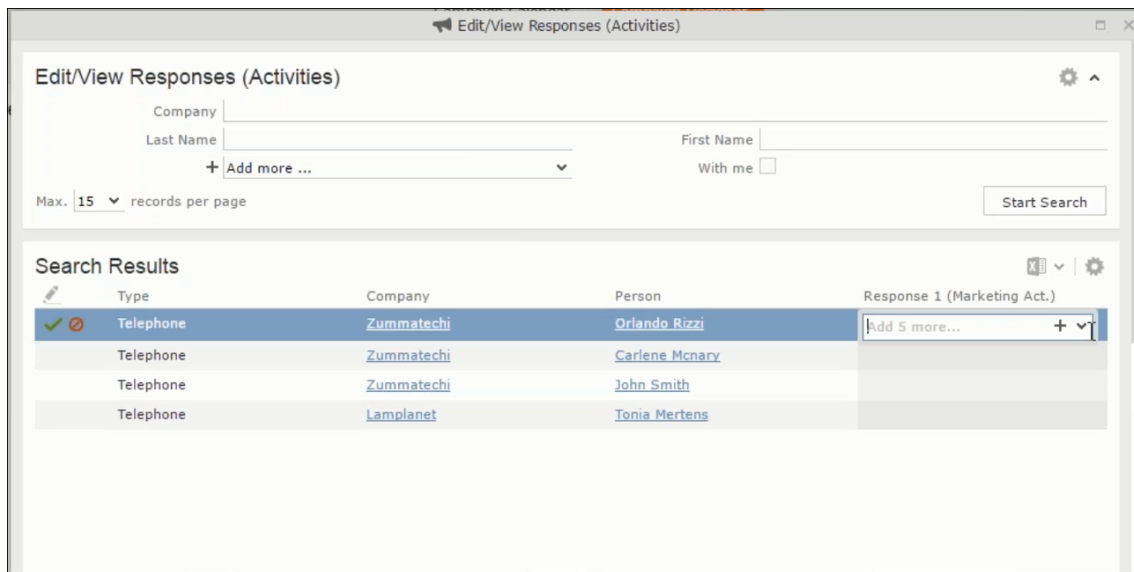### Editing/Viewing the Responses for a Marketing Activity

To edit or view the responses for a marketing activity, perform the following steps:

1. Click icon in the responses row. The Edit/View Response (Activities) window opens.
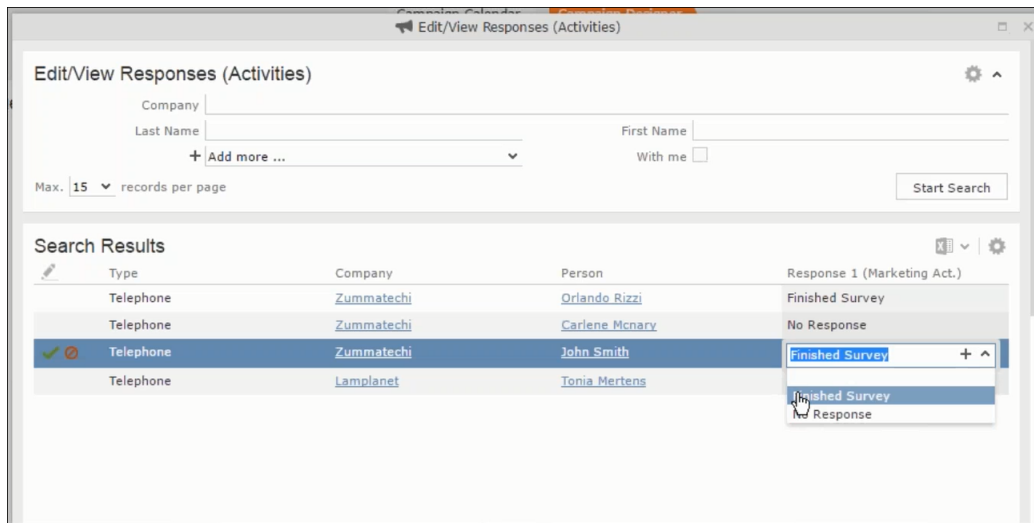

You can search for specific participants and view/edit their responses.

2. Select a row and click on Response 1 (Marketing Act.) column to activate and record the response.
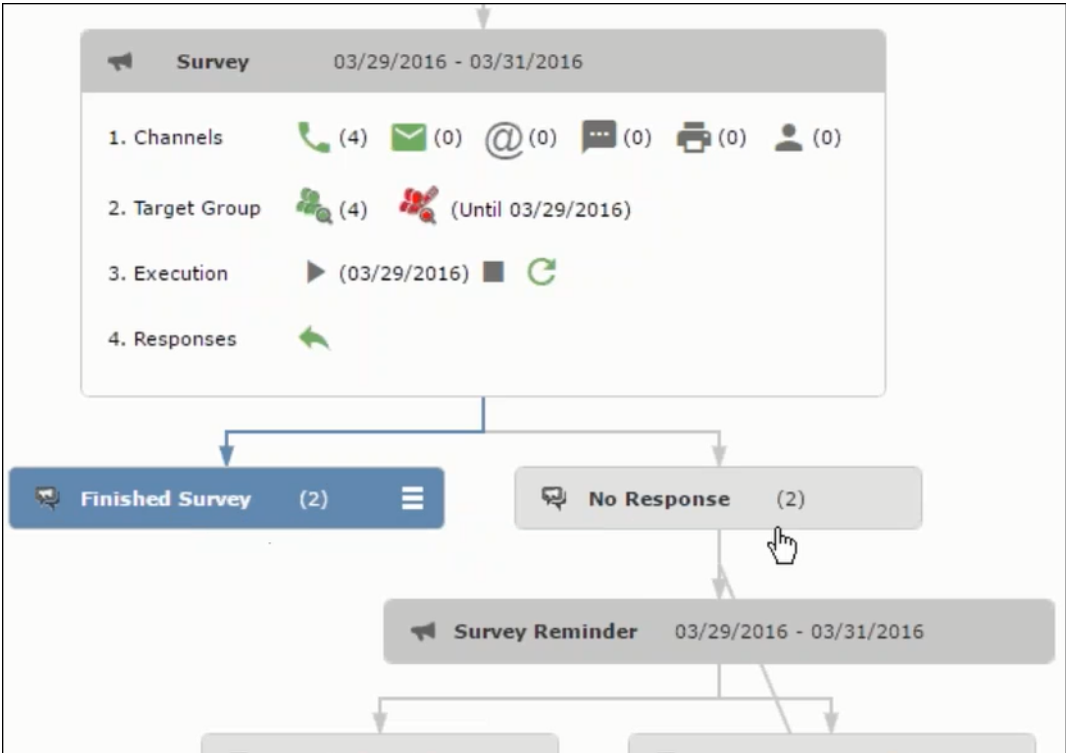
---

3. Click the drop-down list to select the response type. Click on the + button to add more response types to the response catalogue entries.
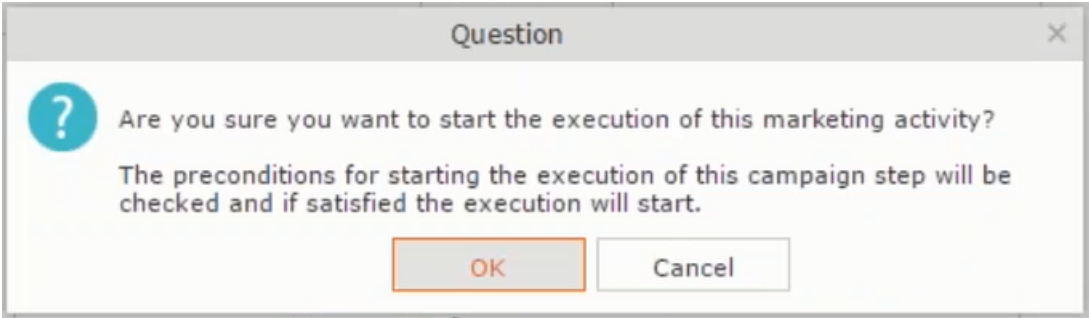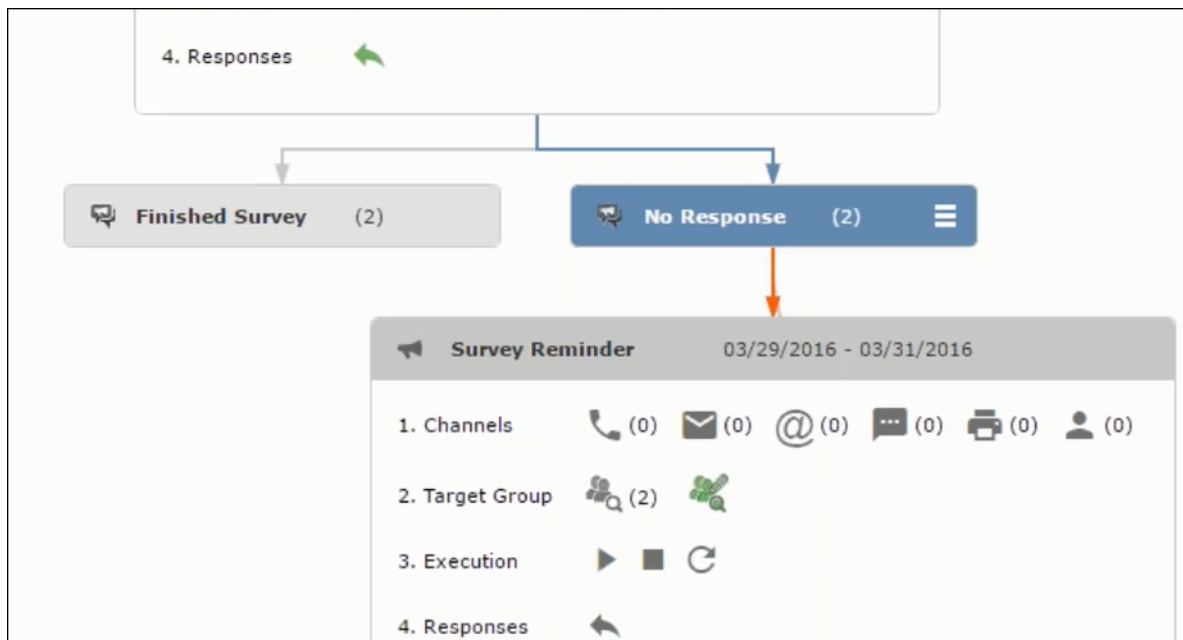

Edit the responses for all the participants.

4. Close the window to come back to the campaign manager window. The response icon is be green in color. This shows that response for all the participants is recorded.

Notice the "(2)" in the response containers for the Survey marketing activity: **Finished Survey** and **No Response** show. This indicates that two participants completed the survey and two members did not respond.
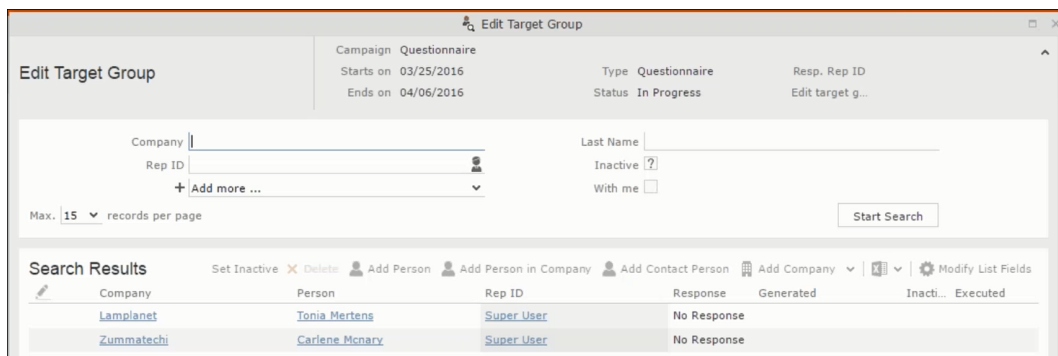
5. Click the button to expand the **Survey Reminder** follow-up marketing activity container for those participants who did not respond to the Survey.

You can see that two participants who did not respond are already added to the target group of the follow-up marketing activity.

6. Click to open the **Edit Target Group** window for the **Survey Reminder** follow-up marketing activity.

You can see that the two members with "No Response" in the **Response** column are listed.
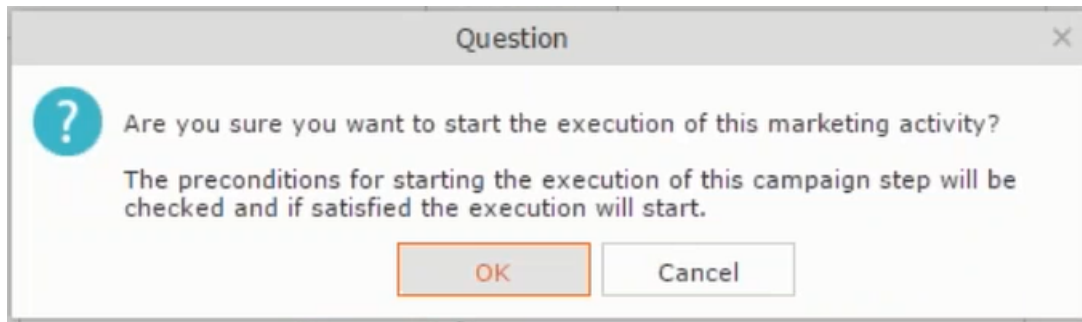
Resetting the Marketing Activity Execution

Restarting a marketing activity is possible if the marketing activity execution is completed. It results in the following:
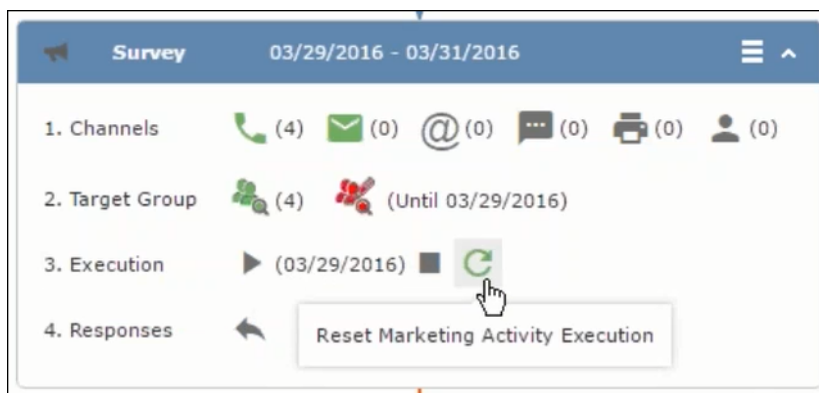
- All generated target group entities marked as "Generated" are deleted.
- The target group entities marked as "non Generated" are retained.
- The target group entities are regenerated based on the selection/query attached to this marketing activity.
- The target group entities that are marked as executed remains in the same state for the current target group.

To reset a marketing activity execution, perform the following:

1. Open the required campaign in the campaign designer.

2. On the marketing activity container, click to expand the container.

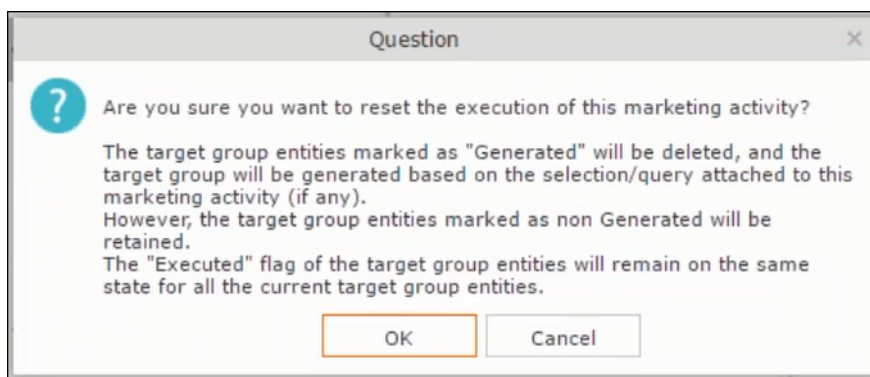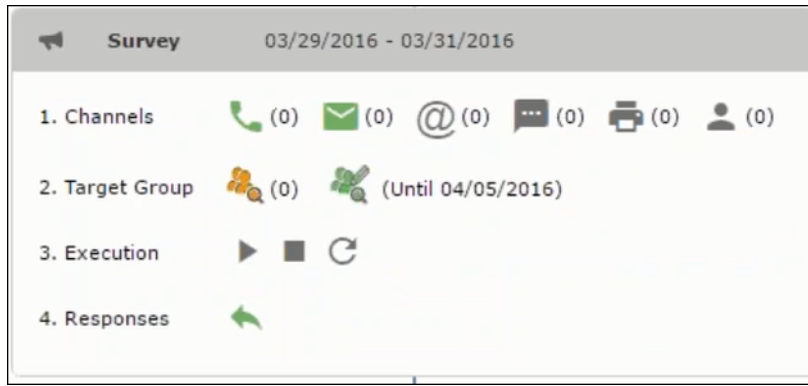The following screenshot shows the **Survey** marketing activity container.

Notice that the execution button and the abort button are in grey. The reset button is in green and is active.

3. Click to reset the marketing activity execution. A confirmation window displays.

4. Click **OK**. The target group is reset and the target group is regenerated. The edit target group until date is reset.

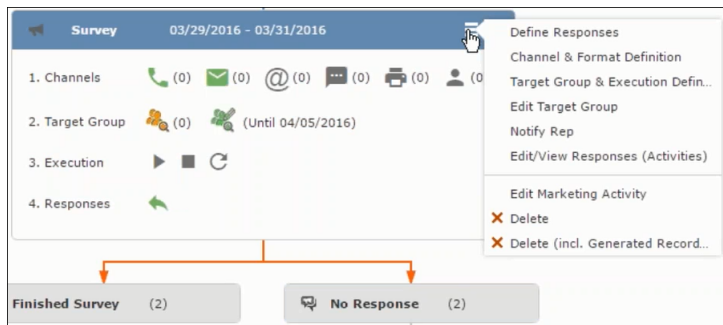Notice that the Target group button is yellow and once the target group generation is completed, the execution button is active and ready for execution. The colors of the target group icon and execute button are in green.
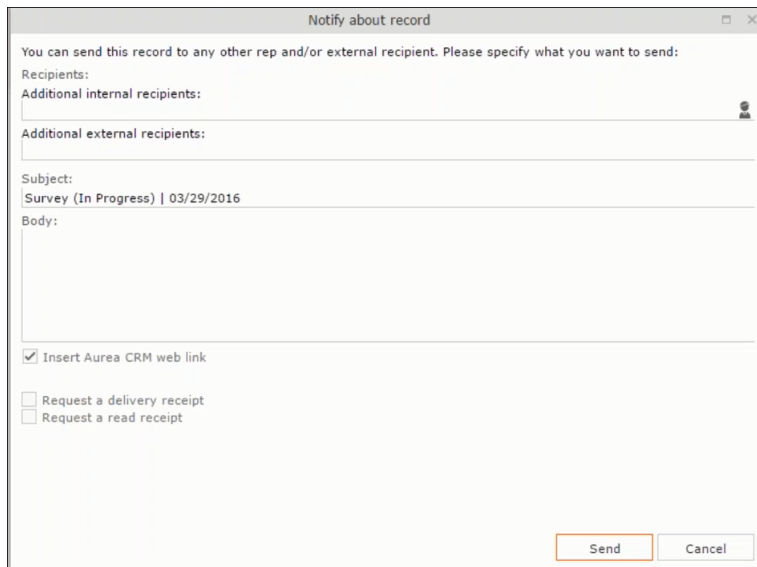
Notifying Reps about a marketing activity

To notify reps, perform the following:

1. From the context menu of a marketing activity container, select **Notify Rep**.

2. The Notify about record opens.

Enter the following information:

- **Recipients** – Add the internal and external recipients (reps) who receive the notification.

- **Subject** – Edit the subject of the notification email in this text field. You can also use the automatically generated subject.

- **Body** – Enter the notification content in the Body field.

- **Insert Aurea CRM web link** – Select this checkbox if you want to add the company URL in the notification.

- **Request a delivery receipt** – Select this checkbox if you want a receipt of delivery.

- **Request a read receipt** – Select this checkbox if you want to know if the notification was read by the recipient.

3. Click **Send** to send the notification to the selected reps.

Editing a Marketing Activity

To edit a marketing activity, perform the following:

1. Open the required campaign in the campaign designer.

2. From the context menu of a marketing activity container, select **Edit Marketing Activity**.

3. The marketing activity window opens.

4. Click Edit to start editing the marketing activity.

5. Make the required changes and click **Save**.

Defining Channels and Formats used in a Marketing Activity

To define the channels and formats for a marketing activity, perform the following steps:

1. Open the required campaign in the campaign designer.

2. On the marketing activity container, click **OK** to expand the container.

The following screenshot shows the **Survey** marketing activity container.

The following is a brief description of the components of a marketing activity:

Channels - The first row shows the available channels of communication for a marketing activity. The following channels are available:

- Phone

- Letter

- Email

- SMS

- Fax

- In-person

The numbers in brackets besides each channel represents the number of target group entities that is processed using this channel.

Target Group – In this step you can define the target groups (customers etc) who are to be the participants of this marketing activity.

Execution – In this step, you can execute and start the marketing activity.

Responses – After the execution of the marketing you can evaluate the responses from participants.

3. Click on any of the channel icons to open the **Channel & Format Definition** window.
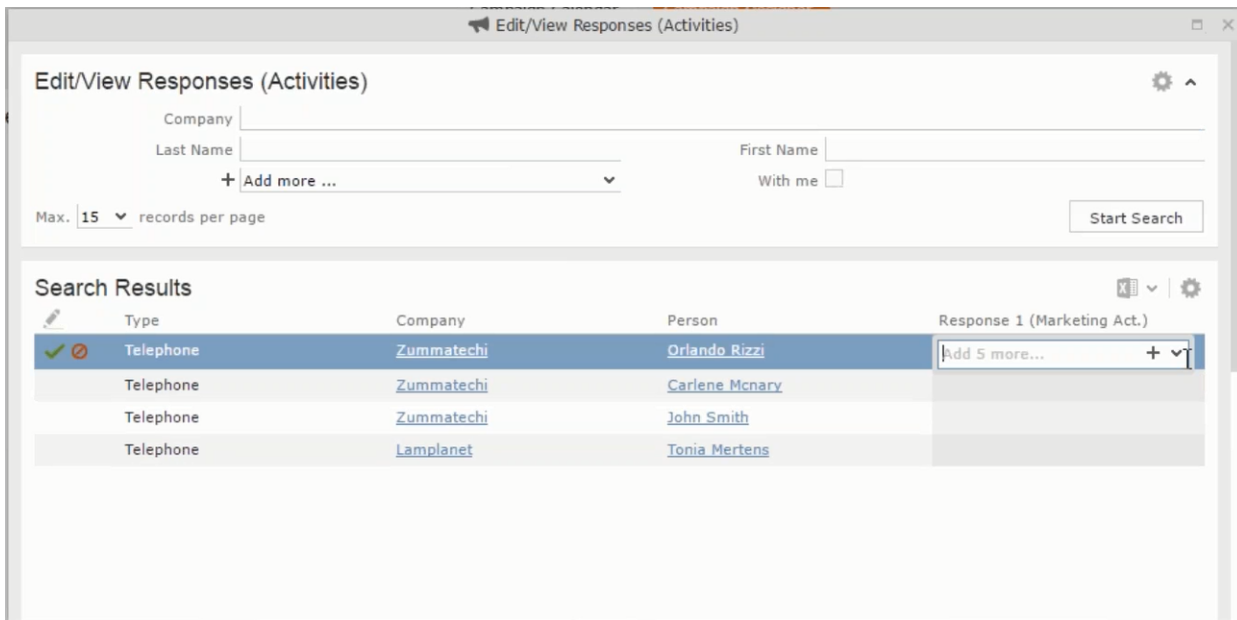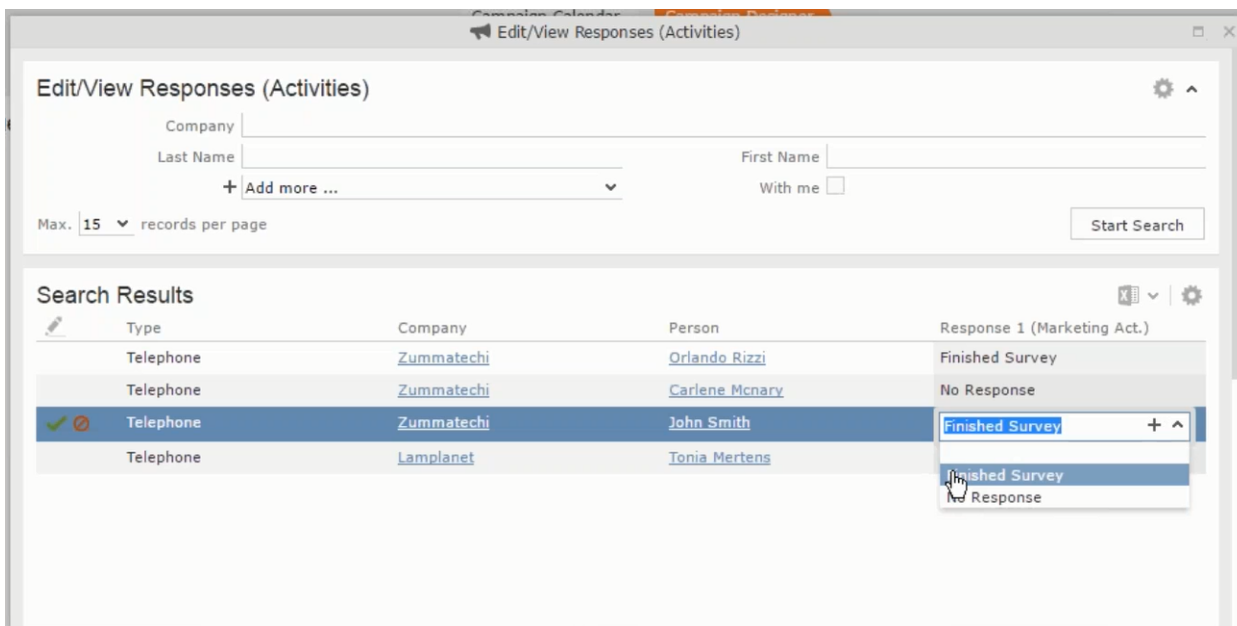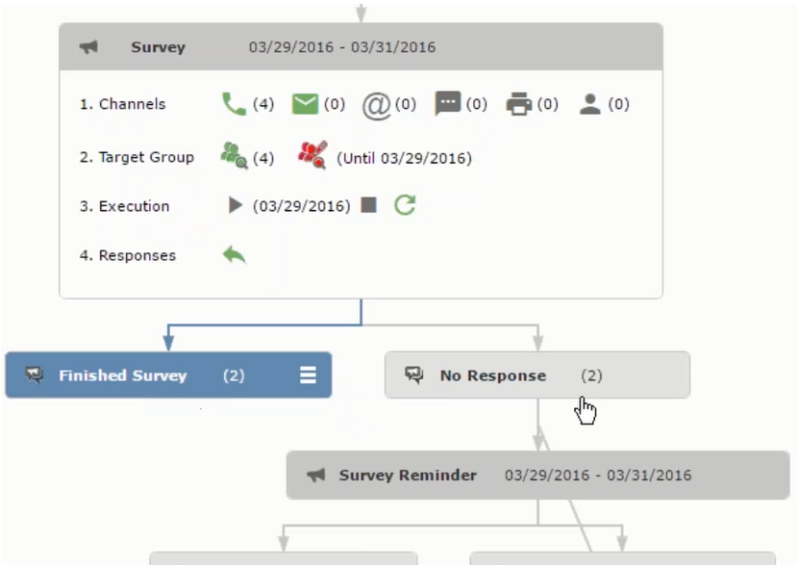

The channel and format definition process contains three phases: **Define Channel(s)** > **Define Format** > **Define Default Values** . The window opens on the **Define Channel(s)** phase.

- **Define Channels** – In this phase you can select the channels that are used to approach the customers for the marketing activities.

- **Define Format** – In this phase you can define the formats to be used for each of the channels you selected in the first phase. For example a template document for an email or fax, the fields that are used in the generation of a letter and similar formats for each of the required channels. The fields you want to include from different CRM info areas in the templates.

- **Define Default values** – You can define the default values for the marketing activities that are generated.

4. Provide the following information in the **Define Channel(s)** phase:

Format Definition

- **Format Name** – You can give a name to the format definition or retain the automatically generated name. This field is mandatory.

- **Lock** – Select this check box to lock the message format for the marketing activity.

- **Private** - Select this check box to keep the message generated for the marketing activity private.

Preferred Channels

- **Fixed** – You can select one fixed channel.

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.

↻

The Define Format window opens with tabs for each of the channel you selected. You can define the information required for the message formats required for the selected channels by clicking each of the tabs.

Note: The Phone and In-Person channels do not require and further configuration information. The remaining channels Letter, Email, SMS, and Fax require further configuration information you can define in this window.

The fields that are in Orange are mandatory fields. If you do not fill the mandatory fields then you can still save the channel format but you cannot execute the channel definition.

If you do not fill in a mandatory field and save the channel format, then if you go back to the Campaign designer you can see that the channels you selected is not green in color. See the screenshot below. The phone channel is in green color, but the Letter and Email channels are in grey.

6. Click on the Letter icon and it directly opens the Letter tab in the Define Format process step. Enter the format details of the channels including all the mandatory steps.

7. After providing the required information, click **Save Default Values**. Then click **Proceed** to move to the **Define Default Values** phase.

You provide a **Default Values Name** or use the automatically generated one. You can also search for and load a previously saved default values by using the **Load Default Values** button.

8. After entering the default values, click **Save Default Values** and then click **Proceed**. You are returned to the campaign designer window.

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**.

and **Execution Definition** window.

You can create the target group and define execution type using the following buttons:

- New Query – Use this to create a target group using the Standard Query process.

- New Quick Query – Use this to create a target group using the Quick Query process.

- Load Query – Use this to search for and load a query that is already created and saved.

- Select/Rework Target Group – Use this to select a different target group or modify the target group.

- Define Execution Type – This allows you to define the dates until which the queries are executed to update the target group. You can also define the execution types.

If you were to start creating the target group, but stop in between and reopen this window it also shows the current query you were working on. It now have options to edit or unlink the current query from the marketing activity. For example:

the above screenshot shows the current query that was being worked on to create the target group. The flag icon indicates that the current query is a standard type query.

3. To create the target groups and define the execution type, perform one of the following:

- Using the New Query button:

    1. Click New Query to open the standard New: Query window.

    2. Enter the **Query Name** and the **UQL syntax** for the query and run the query to get a list of entities for the target group. These are added to the target group.

    Note: Instead of using an UQL, you can specify the infoarea, the fields to search, and the conditions by using the buttons in the Formatted and Conditions sections.

    ---

    3. Click **Save** to proceed to the next step, **Define Execution Type** window. In this window you can specify the following information:

        - Edit target group until – Specify the date until the target group can be updated based on the result of the query.

        - Execution Type – Select the execution type from the drop-down list.

4. Click to open the **Create Target Group** step window.

If any of the items in the previous two steps are incomplete, you get warning messages. For example, if you had not defined the execution type and edit target group until date fields in the Define Execution Type window then Create Target Group window displays the incomplete steps as shown below. Also notice that the Create Target Group tab at the top has a red dot in it instead of a green dot.

5. Click **Create Target Group** to complete the creation of the target group process. A notification window along with some progress indicators are created as shown in the screenshot below.

The Target Group icon is now orange in color to indicate that the target group creation is in progress. Also the Target Group row now has date until which the target group list can be updated. Once the target group is processed then the channels and target group icons has the target group numbers in the brackets besides the respective icons.

Once the server creates the target group and updates the marketing activity is to be executed on the date specified. The icons are displayed in green. See the screenshot below.

6. To edit the target group click . The Edit Target Group window opens.
You can use the search queries to add more recipients to the target group.

Note: The target group icon turns Red () after the "Until" date.

- To create the target groups and define the execution type using the New Quick Query option, perform one of the following:

  1. Click the New Quick Query button from the Target Group & Execution Definition window. The Create Target Group using Quick Query window is opened.

2. Select the Root Info Area from the dropdown list.

3. Click **Run Query**. The query results are listed. Click Finalize Query.

4. Define if the query results are Private Query or Public Query. Enter a name in **Save As …** field.

5. Click Save to finalize the results and attach the query results to this marketing activity. The Create Target Group window opens.

If any of the intermediate process steps are incomplete, you get a warning message, including if the target group is already created. A sample screenshot is provided below:

6. Click **Create Target Group** to complete creating the target group.

Selecting or modifying the target group

1. Open the required campaign in the campaign designer.

2. On the marketing activity container:

- Click OK to expand the container.

- Click the target group icon to open the **Target Group**

- and **Execution Definition** window.

3. Click **Select/Rework Target Group**. The **Select/Rework Target Group** window displays.

4. You can search for marketing activities and select the desired marketing activity. The target group entities for the selected marketing activity are listed below.

5. Double click on the marketing activity to add the target group from the selected marketing activity to the target group of the current marketing activity. The Execution Definition window displays.

6. Specify the following information:

   • **Edit target group until** – Specify the date until the target group can be updated.

   • **Execution Type** – Select the execution type from the drop-down list.

7. Click Proceed. The campaign designer window opens.

8. Click ⊡ to view the newly added participant to the target group.

Defining Execution Type

To define an execution type, perform the following:

1. Open the required campaign in the campaign designer.

2. On the marketing activity container:

• Click OK to expand the container.

• Click the target group icon to open the **Target Group**

- and **Execution Definition** window.

3. Specify the following information:

- **Edit target group until** – Specify the date until the target group can be updated.
- **Execution Type** – Select the execution type from the drop-down list.

4. Click Proceed. The campaign designer window opens.

Executing a Marketing Activity

To execute a marketing activity, the following conditions should be met:

- All the selected channels and their formats should be defined. The selected channel icons would be green in color.
- The target groups should be defined. The Target group icons would be green in color.

- The current date should be within the scope of the start and end dates of the campaign.

- The "Edit target group until date" has to be defined. This date is visible besides the edit target group icon (🔽).

To execute a marketing activity, perform the following steps:

1. Open the required campaign in the campaign designer.

2. On the marketing activity container:

   - Click OK to expand the container.

   - The following screenshot shows the **Survey** marketing activity container.
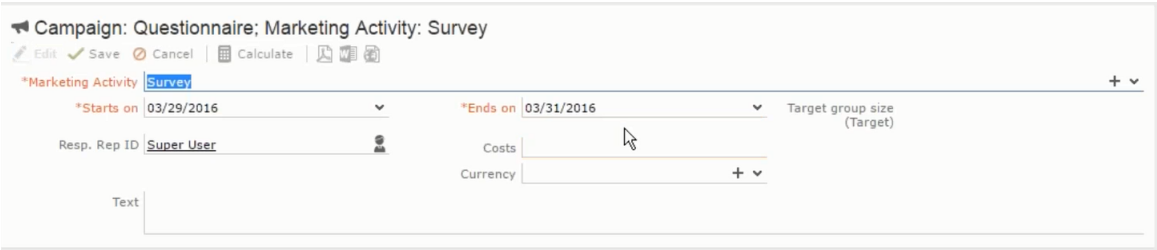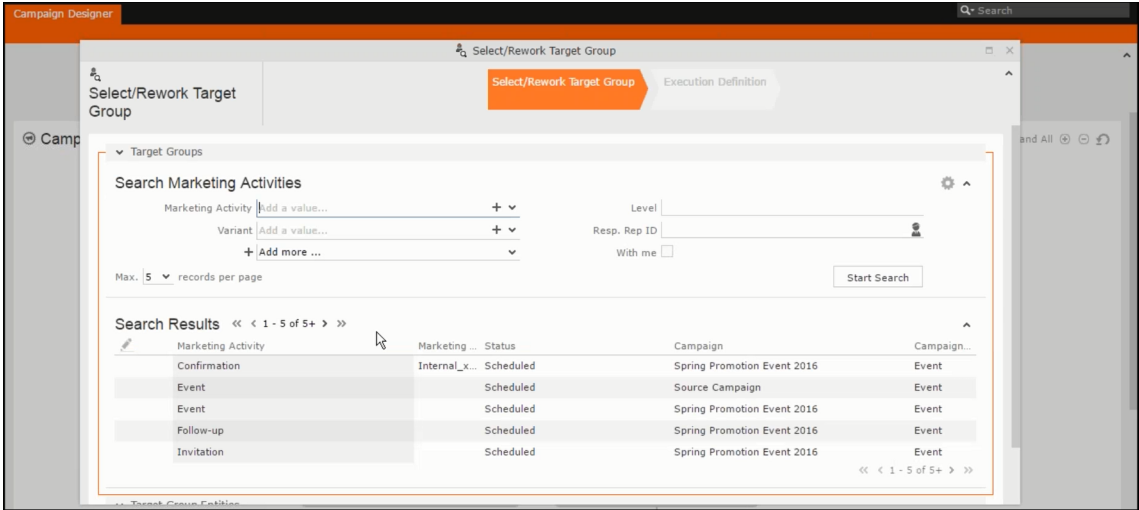

3. Click the ▶ button on the **Execution** row. A query window pops up asking you to confirm the operation.

4. Click **OK**. A server notification informs you that the marketing activity has started and informs you when it is completed.

The Execute button is now greyed and the date on which the execution starts automatically is displayed in brackets besides it.

Note: The edit target group icon is now in red (🎯). The abort button is greyed out once the execution starts. And reset button is now activated. The Responses button remains grey until the all the participants have responded.

Editing/Viewing the Responses for a Marketing Activity

To edit or view the responses for a marketing activity, perform the following steps:

1. Click ↰ icon in the responses row. The Edit/View Response (Activities) window opens.

You can search for specific participants and view/edit their responses.

2. Select a row and click on Response 1 (Marketing Act.) column to activate and record the response.

3. Click the drop-down list to select the response type. Click on the + button to add more response types to the response catalogue entries.

Edit the responses for all the participants.

4. Close the window to come back to the campaign manager window. The response icon is be green in color. This shows that response for all the participants is recorded.

Notice the "(2)" in the response containers for the Survey marketing activity: **Finished Survey** and **No Response** show. This indicates that two participants completed the survey and two members did not respond.

5. Click the button to expand the **Survey Reminder** follow-up marketing activity container for those participants who did not respond to the Survey.

You can see that two participants who did not respond are already added to the target group of the follow-up marketing activity.

6. Click to open the **Edit Target Group** window for the **Survey Reminder** follow-up marketing activity.

You can see that the two members with "No Response" in the **Response** column are listed.

Resetting the Marketing Activity Execution

Restarting a marketing activity is possible if the marketing activity execution is completed. It results in the following:

- All generated target group entities marked as "Generated" are deleted.
- The target group entities marked as "non Generated" are retained.
- The target group entities are regenerated based on the selection/query attached to this marketing activity.
- The target group entities that are marked as executed remains in the same state for the current target group.
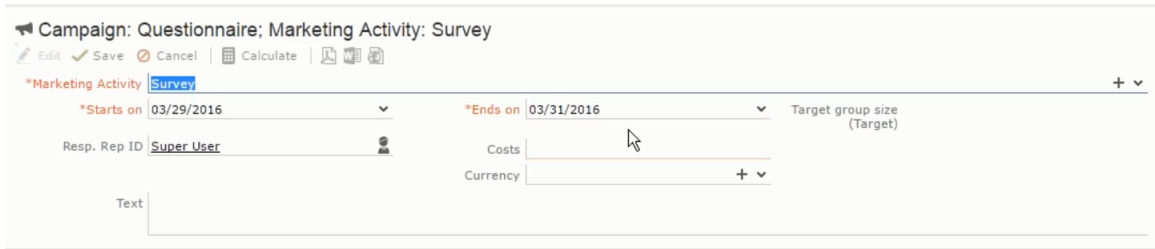
To reset a marketing activity execution, perform the following:

1. Open the required campaign in the campaign designer.

2. On the marketing activity container, click to expand the container.

The following screenshot shows the **Survey** marketing activity container.

Notice that the execution button and the abort button are in grey. The reset button is in green and is active.

3. Click to reset the marketing activity execution. A confirmation window displays.

4. Click **OK**. The target group is reset and the target group is regenerated. The edit target group until date is reset.

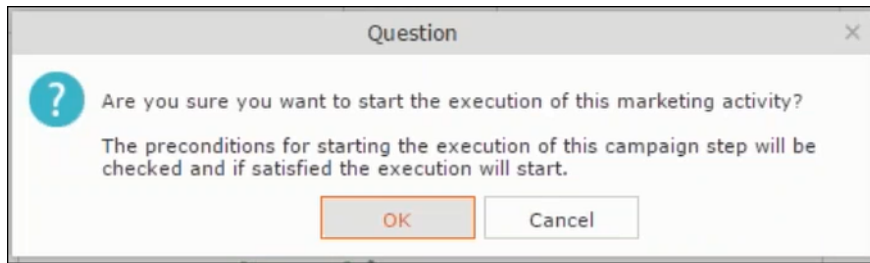Notice that the Target group button is yellow and once the target group generation is completed, the execution button is active and ready for execution. The colors of the target group icon and execute button are in green.

Notifying Reps about a marketing activity

To notify reps, perform the following:

1. From the context menu of a marketing activity container, select **Notify Rep**.

2. The Notify about record opens.

Enter the following information:

- **Recipients** – Add the internal and external recipients (reps) who receive the notification.

- **Subject** – Edit the subject of the notification email in this text field. You can also use the automatically generated subject.

- **Body** – Enter the notification content in the Body field.

- **Insert Aurea CRM web link** – Select this checkbox if you want to add the company URL in the notification.

- **Request a delivery receipt** – Select this checkbox if you want a receipt of delivery.

- **Request a read receipt** – Select this checkbox if you want to know if the notification was read by the recipient.

3. Click **Send** to send the notification to the selected reps.

Editing a Marketing Activity

To edit a marketing activity, perform the following:

1. Open the required campaign in the campaign designer.

2. From the context menu of a marketing activity container, select **Edit Marketing Activity**.

3. The marketing activity window opens.

4. Click Edit to start editing the marketing activity.

5. Make the required changes and click **Save**.

Email Campaign Management

Email Campaign Management Using Aurea Campaign Manager (formerly called Lyris HQ)

As part of a campaign, the marketing activities can be carried out using multiple channels, like letters, fax, telephone, and email. Generally the email channel is the most preferred channel for marketing activities. While Aurea CRM provides its own email channel, it does not provide all the capabilities of a dedicated Email marketing solution. In order to provide a sophisticated email marketing channel Aurea CRM is integrated with Aurea Lyris HQ, a full-fledged Email marketing solution. Aurea CRM Enterprise edition users can use Lyris HQ to handle their email marketing activities and take full advantage of the sophisticated email marketing capabilities of Lyris HQ.

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.

2. From the campaign container context menu select New Marketing Activity. The New Marketing Activity window displays.

3. Enter the required details. In this example we create a NewLaunchInvitation as the Marketing Activity.

4. Click Save to create the new marketing activity container in the campaign designer.

5. Click (email channel). The Channel & Format Definition page displays.

a. Select the E-mail channel radio button under the Fixed column.

b. Select the Activity and Mailing options under the Generate column. These are optional.

> **Note:** If you wish to use multiple channels for the marketing activity, you can select the E-mail checkbox along with other required channels under the Variable (Priority) column.

6. Click Save Channel(s).

7. Click Proceed, to go to the format definition phase. The Define Format page displays.

You can see that Lyris Email channel definition page is available. If Lyris is not enabled then the standard email channel definition page would be visible. Contact your CRM administrator to enable the Lyris email marketing channel.

8. Populate the fields as described below. These fields are mandatory in order to transfer the marketing activity to Lyris.

> **Note:** The Create in Lyris button is activated once all the fields are populated and the channel format is saved.

• Lyris Mailing List:Click to get a drop-down list of mailing lists in Lyris. Select the required mailing list. You can also create a new mailing list. To create a new mailing list, perform the following:

1. Click +. The Create new mailing list in Lyris dialog displays.

A default name (CRM-NewProductLaunchEvent - NewLaunchInvitation) is provided which is a concatenation of three names: default mailing list prefix configured in the CRM Designer (CRM-) + the campaign name (NewProductLaunchEvent) + the marketing activity name (NewLaunchInvitation).

In case the marketing activity does not belong to a campaign then the prefix and the activity name is used. For this example, CRM-NewLaunchInvitation. You can rename it to a desired name. In this example, we change the name to CRM- NewLaunchInvitation.

2. Click OK. A new blank mailing list is created in Lyris.

   If for some reason the mailing list could not be created in Lyris then the dialog displays the appropriate error message. For example, the following screenshot shows the error message that a mailing with the same name already exists.

- **E-mail: Send as**: Select the desired format of the email you wish to send: HTML or Text
- **E-mail From**: Enter the email address of the marketing email sender.
- **From Name**: Enter the name of the sender.
- **Subject**: Enter the subject for the email.

Note: The above fields are used as properties of the email messages that are created in Lyris.

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9. Click Save Channel Format(s). After the channel format is saved, the Create in Lyris button gets activated.

10. Click Create in Lyris.

   A dummy message is created in Lyris for the marketing activity. Depending on your selection for the E-mail Send as field the dummy message is a text or HTML message. A tick appears besides the *lyris* icon on successful creation of the message. And a Detach message button displays. The ids for the mailing list and message created in Lyris are displayed along with the links to the instances in Lyris. See the screenshot below.

Click Detach Message to delete the message created in Lyris. Once the message is detached, all the attributes of the message are cleared, including the links in the Lyris Message ID and Lyris Mailing List fields. The corresponding message created in Lyris is also deleted. If the message is already sent then any responses received for the message are ignored by Lyris and Aurea CRM does not get any event corresponding to the message.

11. Click Save Channel Format(s).

12. Click Proceed.

Transferring from the Standard Editor

If you prefer to use the standard editor for creating marketing activities instead of the Campaign Designer, you can still transfer a marketing activity to Lyris from the standard editor.

To transfer a marketing activity from the standard editor to Lyris, perform the following:

1. Select Marketing > Marketing Activities from the CRM menu. The Search Marketing activities page displays.

2. Enter the search filters and click Start Search. The search results list displays.

3. Open the context menu of the required marketing activity from the result list and select Tab View or Tree View. The Marketing Activity window displays.

Note: Double clicking a marketing activity from the result list opens the marketing activity in the campaign designer.

4. Select Create Marketing Activity Format from the context menu. The Marketing Activity Format window displays.

5. Select the preferred channel. Click the E-mail radio button under Fixed, then click the Email tab.

You should see the Lyris Email channel definition page. If Lyris is not enabled then the standard email channel definition page would be visible. Contact your CRM administrator to enable the Lyris email marketing channel.

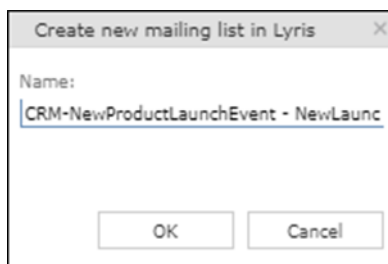6. The remaining steps are similar to those listed for transferring a marketing activity to Lyris from the campaign designer, see steps 8 to 10 in the topic Transferring from the Campaign Designer on page 632.

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.

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.

2. From the campaign container context menu select New Marketing Activity. The New Marketing Activity window displays.

3. Enter the required details. In this example we create a NewLaunchInvitation as the Marketing Activity.

4. Click Save to create the new marketing activity container in the campaign designer.

5. Click (email channel). The Channel & Format Definition page displays.

a. Select the E-mail channel radio button under the Fixed column.

b. Select the Activity and Mailing options under the Generate column. These are optional.

Note: If you wish to use multiple channels for the marketing activity, you can select the E-mail checkbox along with other required channels under the Variable (Priority) column.

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6. Click Save Channel(s).

7. Click Proceed, to go to the format definition phase. The Define Format page displays.

You can see that Lyris Email channel definition page is available. If Lyris is not enabled then the standard email channel definition page would be visible. Contact your CRM administrator to enable the Lyris email marketing channel.

8. Populate the fields as described below. These fields are mandatory in order to transfer the marketing activity to Lyris.

Note: The Create in Lyris button is activated once all the fields are populated and the channel format is saved.

- Lyris Mailing List:Click to get a drop-down list of mailing lists in Lyris. Select the required mailing list. You can also create a new mailing list. To create a new mailing list, perform the following:

  1. Click +. The Create new mailing list in Lyris dialog displays.

  A default name (CRM-NewProductLaunchEvent - NewLaunchInvitation) is provided which is a concatenation of three names: default mailing list prefix configured in the CRM Designer (CRM-) + the campaign name (NewProductLaunchEvent) + the marketing activity name (NewLaunchInvitation).

  In case the marketing activity does not belong to a campaign then the prefix and the activity name is used. For this example, CRM-NewLaunchInvitation.

  You can rename it to a desired name. In this example, we change the name to CRM- NewLaunchInvitation.

  2. Click OK. A new blank mailing list is created in Lyris.

If for some reason the mailing list could not be created in Lyris then the dialog displays the appropriate error message. For example, the following screenshot shows the error message that a mailing with the same name already exists.

- **E-mail: Send as**: Select the desired format of the email you wish to send: HTML or Text

- **E-mail From**: Enter the email address of the marketing email sender.

- **From Name**: Enter the name of the sender.

- **Subject**: Enter the subject for the email.

Note: The above fields are used as properties of the email messages that 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.

Note: Double clicking a marketing activity from the result list opens the marketing activity in the campaign designer.

4. Select Create Marketing Activity Format from the context menu. The Marketing Activity Format window displays.

5. Select the preferred channel. Click the E-mail radio button under Fixed, then click the Email tab.

You should see the Lyris Email channel definition page. If Lyris is not enabled then the standard email channel definition page would be visible. Contact your CRM administrator to enable the Lyris email marketing channel.

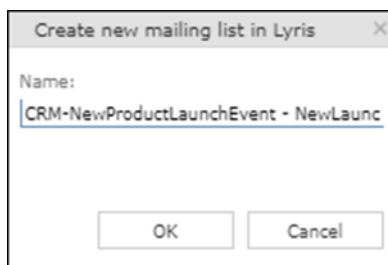6. The remaining steps are similar to those listed for transferring a marketing activity to Lyris from the campaign designer, see steps 8 to 10 in the topic Transferring from the Campaign Designer on page 632.

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.

The values are changed from **dirk@ecogreen.com**, Dirk, and "New Product Launch Invitation" to **maya@ecogreen.com**, Maya, and "New Product Launch Event – Ecogreen" respectively. The corresponding changes are reflected in the Lyris message.

Note: Automatic transfer of changes to Lyris can take some time.

Deleting an Email Marketing Activity in Aurea CRM

Deleting an email marketing activity in Aurea CRM also deletes the corresponding segment created in the Aurea Campaign Manager. If any messages are received by the Aurea Campaign Manager related to the deleted Segment (marketing activity) then those messages are ignored by the Aurea Campaign Manager. A notification is also generated for the Rep responsible for the marketing activity.

The marketing activity container menu provides two delete menu options: Delete, and Delete (Incl Generated Records). Both the options work the same, with the added ability to also clear all the links and records generated in the scope of the marketing activity.

Default Values for Marketing Activity Mailings

The default Mailings values defined for a marketing activity are included in the Mailings records maintained for all email marketing activities and responses to an email message for each target group member. The Mailings record also maintains the status of an email message sent to the corresponding Contacts in Lyris. The Mailings record is updated in Aurea CRM by the events (EmailOpenedMessage, DeliveryStatusMessage, and BounceDetailsMessage) generated by Lyris. The Mailing record is first created by Aurea CRM on receiving the DeliveryStatusMessage event, when Lyris sends the email message to the target group member.

Click the response icon to open the Edit /View Responses (Mailings) page. See the screenshot below:
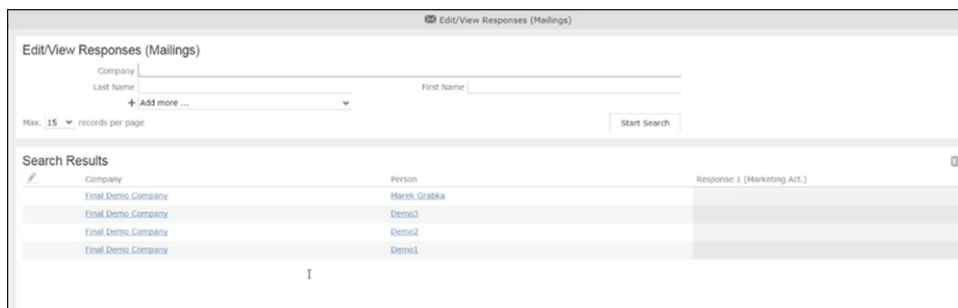
Opening a Mailings records shows the default values set in the Default Values (Mailings) step of the Channel and Format definition, after transferring the marketing activity to Lyris. The default values are visible under the General tab of the Mailings record of the target group member.
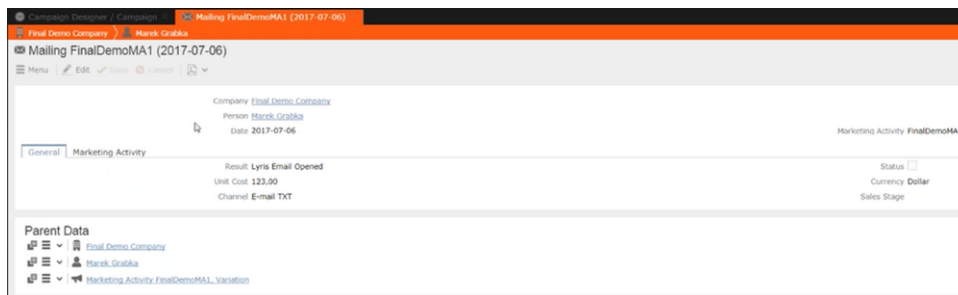
Notice that the Results field shows that the marketing email message was opened by the recipient target group member. The message reads Lyris Email Opened. The other possible values that are related to Lyris events are Lyris Email Sent, Lyris Email Delivered, and Lyris Email Bounced. These correspond to the state of the email messages that were sent to the contacts by Lyris.

You can manually change the status of the email message in the Mailing record, if for some reason Lyris did not generate the event to reflect the change in status of the email message for a target group member. This way the responsible Rep can maintain the flow of the email marketing activity.

Viewing Messages and Mailing Lists Created in Lyris

To view the details of the message created in Lyris, see perform the following:

1. Click the link for Lyris Message Id. The Lyris login page displays.

2. Enter your login credentials.

    The Lyris Dashboard window displays.

3. Click on the Messages menu in the left panel.

    The Messages panel displays.

4. Search for the message using the Message Id displayed in Aurea CRM.

5. Open the message.

    You can see that the empty message is created and is open in the Edit Message view.
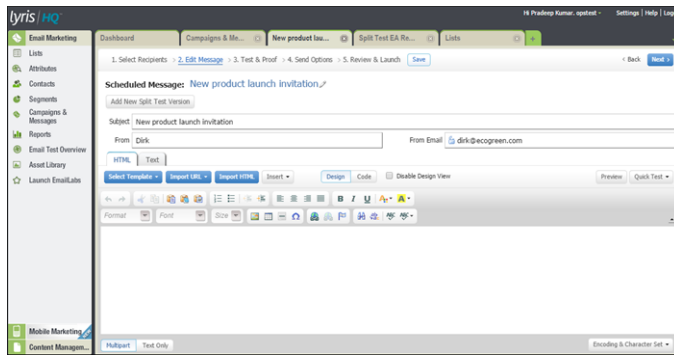
6. You can edit the email.

7. Perform test and proofing and other tasks on email allowed in Lyris. See the Lyris documentation for more information.

To view the details of the mailing list created in Lyris, perform the following:

1. Click the link for Lyris Message Id. The Lyris login page displays.

2. Enter your login credentials.

   • The Lyris Dashboard window displays.

3. Click on the Lists menu in the left panel.

   • The Lyris Email Marketing - Lists page opens in a new
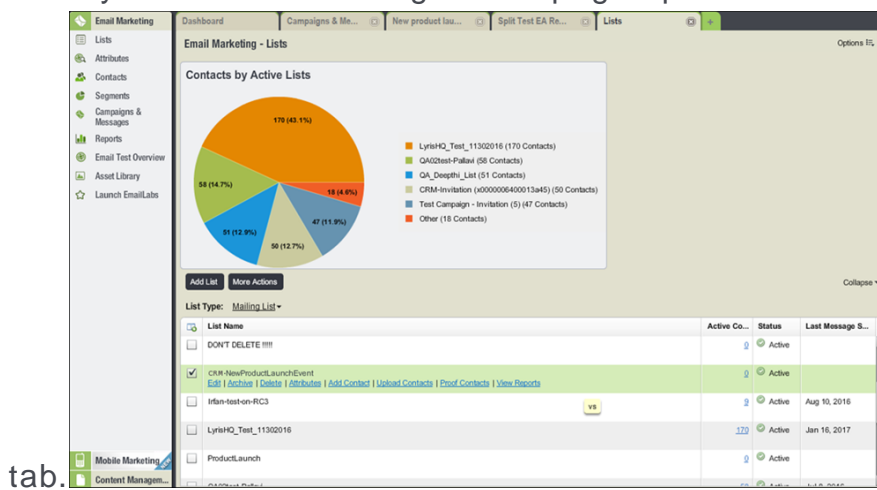
   tab.

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:

1. **Pick CRM Fields**—select the CRM fields listed for the info areas. These fields are added as attributes of a contact that is created in Lyris for each of the target group members transferred to Lyris. The CRM fields are limited to the following infoareas:

   - Company (FI)
   - Contact Person (CP)
   - Person (PE)
   - Person in Company (KP)

2. **Map CRM fields**—the fields selected in the first step are mapped to equivalent demographics present in Lyris or new demographics can be created and added to the Lyris demographics.

3. **Create Segment**—associate the target group with a segment in Lyris. This is important because multiple marketing activities can use the same mailing list. And segments enables you to identify the mailing list members in the context of a marketing activity.

4. **Overview**—this phase displays the number of active target group entities that are eligible to be transferred to Lyris.

5. **Schedule Transfer**—this phase schedules the transfer and ensures that the transfer process remains active until all the entities are transferred to Lyris. For example, if a connection time out happens during the transfer to Lyris, then CRM would try again at a later time until the transfer is complete.

On transferring a target group, an instance for each of the target group member is created in Lyris, using their email contact and demographic details. The target group members are then added as participants to the corresponding mailing list created in Lyris. Aurea CRM ensures the inclusion of the target group members to the segment created in Lyris. You can transfer a target group to Lyris HQ from the campaign designer or from the standard editor for marketing activities

Transferring from the Campaign designer

To transfer a target group for a marketing activity to CRM designer:

1. Open the marketing activity in the campaign designer.

2. Click in the Target Group row. The Transfer Target Group to Lyris page displays.

3. Click the Pick CRM Fields tab. To select the required CRM fields to be included as attributes for the contacts in the target group, perform the following:

   a. Select the required Infoarea from the Info Area dropdown list.

   b. Click the check box to select the required field from each infoarea. You can search for specific fields by typing the field name in the Search Field Name filter. You can sort the displayed fields by name or type by clicking the respective field headers: Field Name or Field Type.

   c. Repeat the above steps to select the required fields from different infoareas.

   The following fields from the infoareas are not displayed:

   • The SeqNo, and StatNo fields.

   • The fields for which the user does not have view rights.

   • The fields containing email addresses. They are automatically transferred.

4. Click Proceed. The Map CRM fields tab gets activated and the following message displays: *Please wait until the mappings between CRM fields and Lyris demographic mappings are loaded...*

Aurea CRM communicates with 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:

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.

d. Click OK. The new demographic is created in Lyris.

e. To view the mapped demographic attributes in Lyris, open Attributes tab and select the required mailing list from the List filter. The Attribute column should show the list of mapped attributes from CRM. See the screenshot below.

5. Click Proceed. The Create Segment tab displays.

6. Click Create Segment. A segment for this mailing list is created in Lyris.

The name of the segment created in Lyris is displayed. Clicking the named URL opens the required Lyris segment in a new tab. The name generated is a concatenation of the name and the record id of the marketing activity.

When the segment for this target group is created in Lyris, it generates the Segment generated event. You can view the segment information in the Segment tab of the Edit/View Target group window.

7. Click Proceed. The Overview tab displays.

The number of active target group entities that are eligible to be transferred to Lyris is mentioned.

> **Note:** If there are no target group entities for the email channel available to be transferred to Lyris, then a message "*No target group entities are eligible to be transferred to Lyris*" is displayed. You should go back and create the target group.

8. Click Proceed. The Schedule Transfer tab displays.

9. Click Schedule Target Group Transfer. A tick mark appears signifying that the transfer process is scheduled.

10. To check the status of the transfer, open the Collaboration > To-Dos menu and search for the required scheduled activity. The status of the scheduled transfer should be visible. The following screenshot shows the status of the transfer is In Progress.

The transfer status changes to Completed, once the target group is transferred successfully.

11. To view the details of the transfer process, open the scheduled entity from the To-Do search list. The Related Data tab contains a link to a text file that contains information about the target group transfer process.

Open the document to find the information on the transfer process.

12. You can check the contacts created in Lyris for the transferred target group members. To list the contacts in Lyris and view the contact details created, perform the following:

a. Open the Contacts tab and select the mailing list from the List filter. The contacts created for his mailing list is displayed.

b. Click View to open the details of the contact generated. The View Contacts dialog displays.

The field values of the mapped fields are transferred from CRM and populated in the corresponding mapped demographics in Lyris

Transferring from the Standard Editor

If you prefer to use the standard editor for creating marketing activities instead of the Campaign Designer, you can still transfer a marketing activity to Lyris from the standard editor.

To transfer a marketing activity from the standard editor to Lyris, perform the following:

1. Select Marketing > Marketing Activities from the CRM menu. The Search Marketing activities page displays.

2. Enter the search filters and click **Start Search**. The search results list displays.

3. Open the context menu of the required marketing activity from the result list and select **Tab View** or **Tree View**. The **Marketing Activity window** displays.

> **Note:** Double clicking a marketing activity from the result list opens the marketing activity in the campaign designer.

4. Select **Related Data** > **Target Group** tab.

5. If there are no items listed in the Target Group Tab, click on the **Create Target Group** link.

6. Once your target group is defined, click the Transfer Target Group to Lyris link. The Transfer Target Group to Lyris page displays.

7. The rest of the steps to transfer the target to Lyris from the standard editor is similar to the way the target group is transferred from the Campaign Designer. Perform the steps 3 to 12 as described in the topic Transferring from the Campaign designer on page 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.

As visible in the screenshot above, a new member (Travis Conners) is added to the target group. The user is automatically added to the corresponding mailing list participants on Lyris, as shown in the screenshot below.

As you can see the new person is added to the list of active participants in the corresponding mailing list.

Deleting a member from the target group

If you delete a member from the target group on Aurea CRM, the corresponding mailing list member in Lyris is moved from **Active members** to the **Admin Trash** list.

Member **Marie Cole** is deleted from the target group.

Member Marie Cole is moved from **Active Members** list to **Admin Trash** list.

Activating or deactivating a target group entity

Deactivating a target group member in Aurea CRM, moves the corresponding member record to the unsubscribed list in Lyris. The following screenshot shows the person entity (Travis Conners) deactivated (**Inactive**) in **Edit Target Group** window.

The corresponding entity is now moved to the unsubscribed list of member records in Lyris.

Similarly, activating an inactive member in the **Edit Target Group** window, moves the member record in Lyris from the **Unsubscribed** list to the **Active Members** list.

Changing the attributes of a target group entity

If the attribute of a target group member already transferred to Lyris is changed, the changes are automatically transferred to Lyris.

In the following screenshots the last name of person entity Conner is changed to Smith, and his email id is changed to the same is reflected in Lyris.

The corresponding changes to the member record in Lyris is shown in the screenshot below.

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:

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.

d. Click OK. The new demographic is created in Lyris.

e. To view the mapped demographic attributes in Lyris, open Attributes tab and select the required mailing list from the List filter. The Attribute column should show the list of mapped attributes from CRM. See the screenshot below.

5. Click Proceed. The Create Segment tab displays.

6. Click Create Segment. A segment for this mailing list is created in Lyris.

The name of the segment created in Lyris is displayed. Clicking the named URL opens the required Lyris segment in a new tab. The name generated is a concatenation of the name and the record id of the marketing activity.

When the segment for this target group is created in Lyris, it generates the Segment generated event. You can view the segment information in the Segment tab of the Edit/View Target group window.

7. Click Proceed. The Overview tab displays.

The number of active target group entities that are eligible to be transferred to Lyris is mentioned.

Note: If there are no target group entities for the email channel available to be transferred to Lyris, then a message "*No target group entities are eligible to be transferred to Lyris*" is displayed. You should go back and create the target group.

8. Click Proceed. The Schedule Transfer tab displays.

9. Click Schedule Target Group Transfer. A tick mark appears signifying that the transfer process is scheduled.

10. To check the status of the transfer, open the Collaboration > To-Dos menu and search for the required scheduled activity. The status of the scheduled transfer should be visible. The following screenshot shows the status of the transfer is In Progress.

The transfer status changes to Completed, once the target group is transferred successfully.

11. To view the details of the transfer process, open the scheduled entity from the To-Do search list. The Related Data tab contains a link to a text file that contains information about the target group transfer process.

Open the document to find the information on the transfer process.

12. You can check the contacts created in Lyris for the transferred target group members. To list the contacts in Lyris and view the contact details created, perform the following:

a. Open the Contacts tab and select the mailing list from the List filter. The contacts created for his mailing list is displayed.

b. Click View to open the details of the contact generated. The View Contacts dialog displays.

The field values of the mapped fields are transferred from CRM and populated in the corresponding mapped demographics in Lyris

Transferring from the Standard Editor

If you prefer to use the standard editor for creating marketing activities instead of the Campaign Designer, you can still transfer a marketing activity to Lyris from the standard editor.

To transfer a marketing activity from the standard editor to Lyris, perform the following:

1. Select Marketing > Marketing Activities from the CRM menu. The Search Marketing activities page displays.

2. Enter the search filters and click **Start Search**. The search results list displays.

3. Open the context menu of the required marketing activity from the result list and select **Tab View** or **Tree View**. The **Marketing Activity window** displays.

Note: Double clicking a marketing activity from the result list opens the marketing activity in the campaign designer.

4. Select **Related Data** > **Target Group** tab.

5. If there are no items listed in the Target Group Tab, click on the **Create Target Group** link.

6. Once your target group is defined, click the Transfer Target Group to Lyris link. The Transfer Target Group to Lyris page displays.

7. The rest of the steps to transfer the target to Lyris from the standard editor is similar to the way the target group is transferred from the Campaign Designer. Perform the steps 3 to 12 as described in the topic

The remaining sections in this chapter talk about the effect of making changes to the target group in Aurea CRM and the corresponding changes in Lyris.

Adding or Deleting member(s) from a Target group

When you add a member to or delete a member from a target group that is already transferred to Lyris, a corresponding member entity is added or deleted from the corresponding mailing list on Lyris.

Adding a member to the target group

In the screenshots below, a fourth member is added to the target group and the corresponding change in Lyris is shown.

As visible in the screenshot above, a new member (Travis Conners) is added to the target group. The user is automatically added to the corresponding mailing list participants on Lyris, as shown in the screenshot below.

As you can see the new person is added to the list of active participants in the corresponding mailing list.

Deleting a member from the target group

If you delete a member from the target group on Aurea CRM, the corresponding mailing list member in Lyris is moved from **Active members** to the **Admin Trash** list.

Member **Marie Cole** is deleted from the target group.

Member Marie Cole is moved from **Active Members** list to **Admin Trash** list.

Activating or deactivating a target group entity

Deactivating a target group member in Aurea CRM, moves the corresponding member record to the unsubscribed list in Lyris. The following screenshot shows the person entity (Travis Conners) deactivated (**Inactive**) in **Edit Target Group** window.

The corresponding entity is now moved to the unsubscribed list of member records in Lyris.

Similarly, activating an inactive member in the **Edit Target Group** window, moves the member record in Lyris from the **Unsubscribed** list to the **Active Members** list.

Changing the attributes of a target group entity

If the attribute of a target group member already transferred to Lyris is changed, the changes are automatically transferred to Lyris.

In the following screenshots the last name of person entity Conner is changed to Smith, and his email id is changed to the same is reflected in Lyris.

The corresponding changes to the member record in Lyris is shown in the screenshot below.

Viewing/Editing the Lyris Segment Details

When a target group is transferred to Lyris a segment definition is created in Lyris. It contains the list of contacts that correspond to the target group members of the marketing activity in Aurea CRM. When the segment is generated in Lyris, the actual email messages are created and sent to each of the target group members. To use an analogy, a segment is like a database query and segment generation is similar to executing the database query that generates the result set of records. The list of contacts for a segment can be edited and updated in Lyris.

When Lyris generates a segment, Aurea CRM on receiving the segment generation event stores the event data in the Segment Compact (EG) infoarea records.

To view the Segment information in Aurea CRM, perform the following:

1. Open the required Campaign containing the marketing activity container.

2. Click the Edit Marketing activity's target group () icon. The Target groups and Segment contacts page displays.

3. Click the Lyris Segment tab.
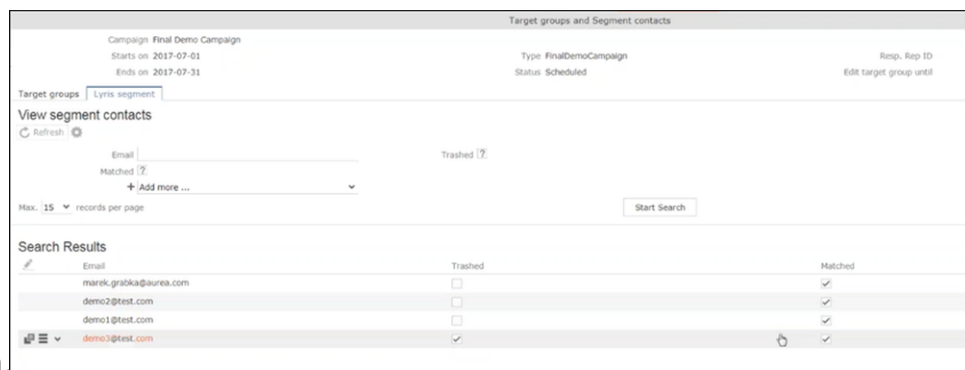
4. Click Start Search   The list of contacts in the segment generated in Lyris are displayed in the Search Results. If there are no results displayed for a segment that is generated in Lyris, click the Refresh button and the segment contacts are fetched from Lyris.

If the state of a contact was set to Trashed in Lyris, the checkbox in the Trashed column is checked. The checkbox in the Matched column is checked when the email address of a target group member for the marketing activity in Aurea CRM, matches the Contacts email address.

5. Double click a Contact listed in the search result list. The EG info area record for the contact displays. The record is read only and cannot be edited.

Note that the target group that contains the matching member with the same email id is displayed in the Related Data section. Also, these records are deleted and recreated every time the Refresh button is clicked in the Target groups and Segment contacts page.

Lyris Event notification – FSI only

This topic explains the Lyris Event notifications.

Aurea Campaign Manager sends the following event notifications when the Contact status of target group member changes:

- Trashed - A target group member is set to Trashed state in the Aurea Campaign Manager.
- Bounced – A target group member is set to Bounced state in the Aurea Campaign Manager.
- Unsubscribed – A target group member unsubscribes in the Aurea Campaign Manager.
- Active - A target group member is set to Active state in the Aurea Campaign Manager.

Aurea Campaign Manager sends the following event notifications on the status of the Email messages for a marketing activity:

- Email Sent – When Aurea Campaign Manager sends the marketing email message to a target group member.
- Email Delivered – When Aurea Campaign Manager delivers marketing activity email message to the inbox of a target group member.
- Email Opened – When the target group member opens the email message for the marketing activity.
- Email Bounced – When the email for a target group member could not be delivered for some reason.

Other event notifications from Aurea Campaign Manager:

- URL Click Event – When a user clicks on a response URL link in a marketing activity email message.

- Update Boolean Field – When the value of a property (demographic) of type Boolean (checkbox), of a target group member in the Aurea Campaign Manager is updated.

- Update Date Field – When the value of a property (demographic), of type Date, of a target group member in the Aurea Campaign Manager is updated. For example, the **Date of Birth** value of a target group member in the Aurea Campaign Manager is updated.

- Update Text Field – When the value of a property (demographic), of type text or text area, of a target group member in the Aurea Campaign Manager is updated. For example, the **First Name** value of a contact in the Aurea Campaign Manager is updated.

- Update Catalog field – When the value of a property (demographic), of type Select List, of a target group member in the Aurea Campaign Manager is updated. For example, the **Country** field of a target group member in the Aurea Campaign Manager is updated.

The following topics describe how Aurea CRM handles each of the different event notifications:

Handling Contact Trashed event

When a target group member's status is set to Trashed in Lyris, a notification message is generated for the responsible Rep of the marketing activity. In the Edit/View target group page, the target group member is set to Inactive, and the checkbox is selected. See the screenshot below:

A pop up in the notification area indicates a new event message. A link to the marketing activity is provided in the Message Information page. The notification contains information about the CRM target group member that was set to Trashed status in the Aurea Campaign Manager. See the screenshot below:

Handling Contact Active event

When an inactive (or trashed) target group member is set to Active in the Aurea Campaign Manager, a notification message is sent to the responsible rep of the marketing activity. In the Edit/View target group page, the target group member is set to active and the Inactive checkbox is unselected.

The Message Information page, contains a link to the marketing activity, it also contains the reasons for setting the target group to active, and the name of the target group member set to Active in the Aurea Campaign Manager.

Handling Contact Bounced event

When Aurea Campaign Manager changes the status of a contact to bounced, the event is received by Aurea CRM and it executes a predefined named trigger. You can define the trigger logic based on your business requirements. For example, a trigger can be executed to set the inactive field to true for bounced target group member.

To set up the required trigger, contact your Aurea CRM System administrator.

Handling Contact Unsubscribed Event

When Lyris changes the status of a contact to Unsubscribed, the event is received by Aurea CRM and it executes a predefined named trigger. You can define the trigger logic based on your business requirements.

To set up the required trigger, contact your Aurea CRM System administrator.

Handling Email Marketing Message Deleted Event

When an Email marketing message is deleted from Lyris, the event is received by Aurea CRM and it executes a predefined named trigger. You can define the trigger logic based on your business requirements. For example, a trigger can be executed to clear the Email properties in Aurea CRM. To set up the required trigger, contact your Aurea CRM System administrator.

A notification message informs the responsible Rep for the marketing activity of the message deletion in the Aurea Campaign Manager. Also, the Create in Lyris button is deactivated and visible in the Define Format tab of the Channel and Format definition page of the marketing activity, as shown in the screenshot below. If required, you can define and save the message format again, before saving it to Lyris.

Handling events with faulty data

Sometimes information received from Aurea Campaign Manager might be faulty and Aurea CRM is unable to perform further processing. Such events are presented as tasks to the Rep responsible for the corresponding marketing activity whose event data could not be processed by Aurea CRM. This enables the Rep to identify the issue and update the proper records manually. All the tasks set up for a Rep can be viewed in the Person, Person Company info areas. In the screenshot below, the Task tab shows all the tasks assigned to the Rep in the Related Data section.

Events generated with invalid data also generate appropriate log messages that are useful in understanding the type of invalid data and provide meaningful clues about the fault. Some of the invalid data scenarios are listed below:

- Invalid Message ID
- Invalid Mailing list ID
- Click events generated by recipients who are not members of Aurea CRM.

To illustrate this lets consider a scenario where the contact's demographics property country is updated. This demographics property in the Aurea Campaign Manager is mapped to the field land and its value needs to be selected from a catalog. The Contact's information cannot be updated by Aurea CRM in the Person (PE) info area record, if the new country value is not present in the CRM catalog.

To handle such events, perform the following steps:

1. Select Collaboration () à Tasks from the main menu. The Search Task page opens.

2. Set the required filter criteria and click Start Search. The search results display.

3. Double click on the task. The task page displays.

The Subject field provides the information about the failed attempt to update the Person record.

4. Click the Details tab. You can find more information about the reasons for the failed activity. Which should inform you about the subsequent actions to take.

In the screenshot above, from the information provided in the Text field you can conclude that the catalog needs to be updated with the new country name. And then the person record needs to be updated with the new country field.

Handling Contact Trashed event

When a target group member's status is set to Trashed in Lyris, a notification message is generated for the responsible Rep of the marketing activity. In the Edit/View target group page, the target group member is set to Inactive, and the checkbox is selected. See the screenshot below:

A pop up in the notification area indicates a new event message. A link to the marketing activity is provided in the Message Information page. The notification contains information about the CRM target group member that was set to Trashed status in the Aurea Campaign Manager. See the screenshot below:

Handling Contact Active event

When an inactive (or trashed) target group member is set to Active in the Aurea Campaign Manager, a notification message is sent to the responsible rep of the marketing activity. In the Edit/View target group page, the target group member is set to active and the Inactive checkbox is unselected.

The Message Information page, contains a link to the marketing activity, it also contains the reasons for setting the target group to active, and the name of the target group member set to Active in the Aurea Campaign Manager.

Handling Contact Bounced event

When Aurea Campaign Manager changes the status of a contact to bounced, the event is received by Aurea CRM and it executes a predefined named trigger. You can define the trigger logic based on your business requirements. For example, a trigger can be executed to set the inactive field to true for bounced target group member. To set up the required trigger, contact your Aurea CRM System administrator.
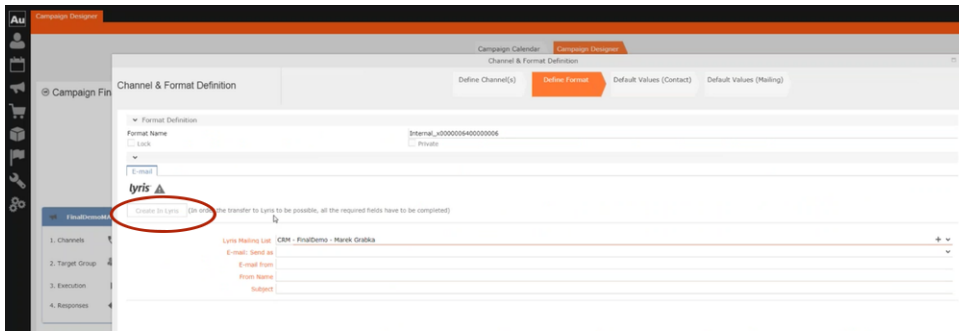
Handling Contact Unsubscribed Event

When Lyris changes the status of a contact to Unsubscribed, the event is received by Aurea CRM and it executes a predefined named trigger. You can define the trigger logic based on your business requirements. To set up the required trigger, contact your Aurea CRM System administrator.

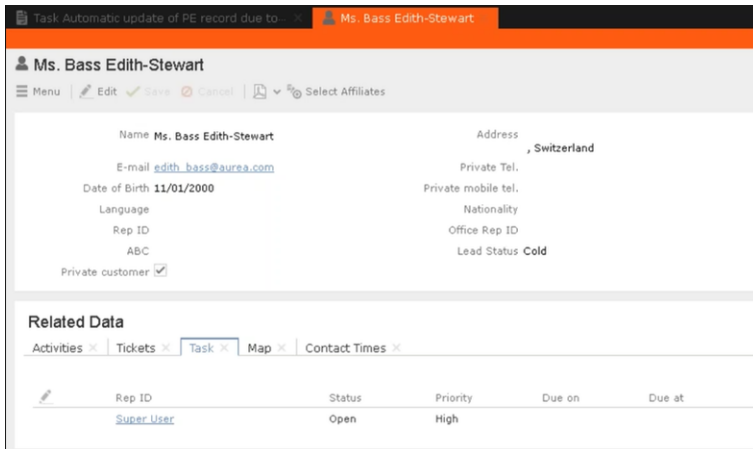## Handling Email Marketing Message Deleted Event

When an Email marketing message is deleted from Lyris, the event is received by Aurea CRM and it executes a predefined named trigger. You can define the trigger logic based on your business requirements. For example, a trigger can be executed to clear the Email properties in Aurea CRM. To set up the required trigger, contact your Aurea CRM System administrator.

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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.

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• Click events generated by recipients who are not members of Aurea CRM.
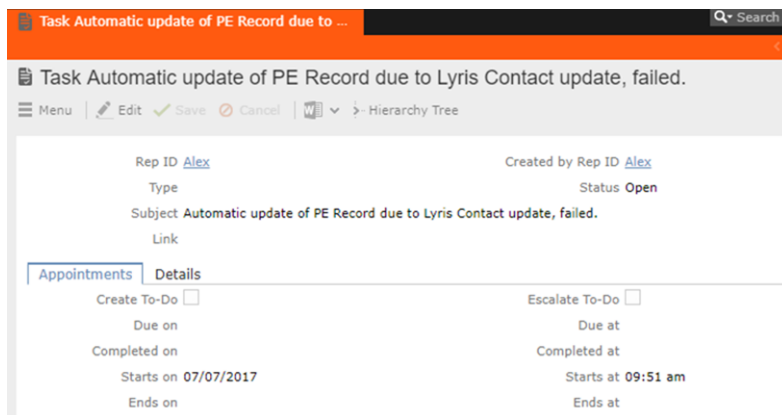
To illustrate this lets consider a scenario where the contact's demographics property country is updated. This demographics property in the Aurea Campaign Manager is mapped to the field land and its value needs to be selected from a catalog. The Contact's information cannot be updated by Aurea CRM in the Person (PE) info area record, if the new country value is not present in the CRM catalog.

To handle such events, perform the following steps:

1. Select Collaboration () à Tasks from the main menu. The Search Task page opens.

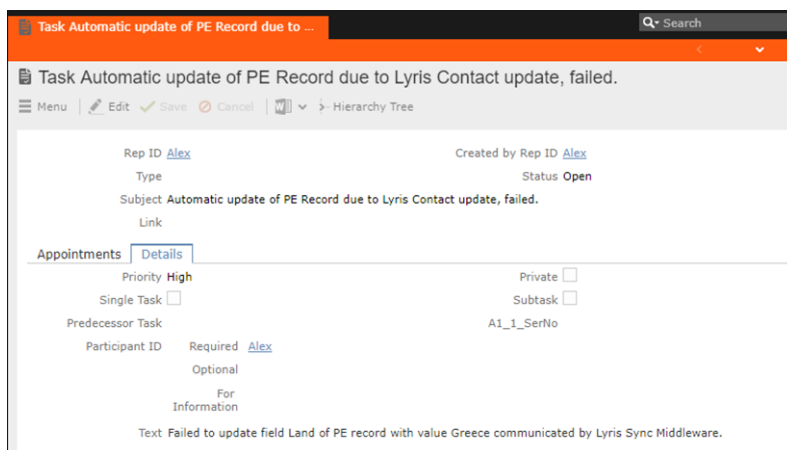2. Set the required filter criteria and click Start Search. The search results display.

3. Double click on the task. The task page displays.

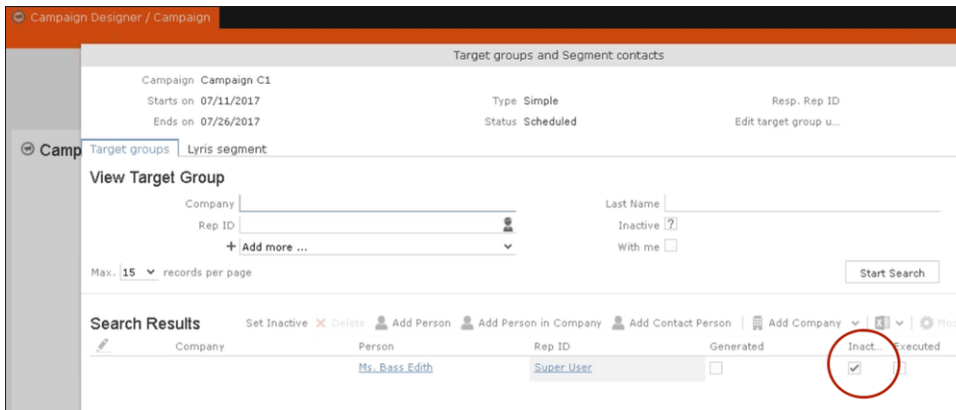The Subject field provides the information about the failed attempt to update the Person record.

4. Click the Details tab. You can find more information about the reasons for the failed activity. Which should inform you about the subsequent actions to take.
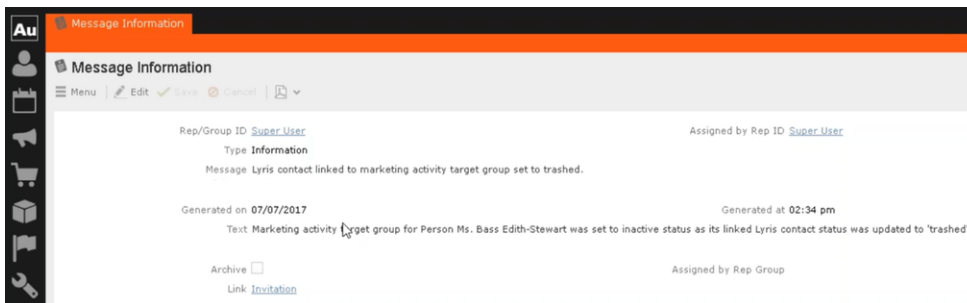

In the screenshot above, from the information provided in the Text field you can conclude that the catalog needs to be updated with the new country name. And then the person record needs to be updated with the new country field.

URLs for a Marketing Response – FSI only

You can configure the marketing activity messages to display links for each response type, that the recipients can click to record his/her response.

The steps described in the sections below, assume an example "Invitation" marketing activity. The expected response from the recipient is to 1. Accept the invitation, 2.Reject the invitation, or 3. Call to confirm. Each of the response to the marketing activity could be configured with a URL that correspond to a link that is presented to the recipients of the Invitation email message. In the steps described below, we set the response URL for the Accepted response.

Important: The corresponding email marketing message in the Aurea Campaign Manager should be edited to include the response links, and their URLs should match the values set in Aurea CRM exactly.

Specifying a Response URL from the Campaign Designer

To specify response URLs for a marketing activity from the Campaign Designer, perform the following steps:

1. Click ☰ in the Accepted response. The context menu displays.

2. Select Set Lyris Email Click URL. The dialog displays.

3. Enter the required Response URL. For example, `http://www.aurea.com?re-sponse=Accepted`.

Note: Use the Clear button to clear any long URL value set previously.

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4. Click OK.

Specifying a Response URL from the Standard Editor

To specify response URLs for a marketing activity from the Standard Editor, perform the following steps:

1. Select Marketing > Marketing Activities from the CRM menu. The Search Marketing activities page displays.

2. Enter the search filters and click Start Search. The search results list displays.

3. Open the context menu of the required marketing activity from the result list and select Tab View or Tree View. The Marketing Activity window displays.

   Note: Double clicking a marketing activity from the result list opens the marketing activity in the campaign designer.

4. Click the Responses tab. The configured responses are listed.

5. Double click on any of the response to open it. The following screenshot shows the Rejected response.

6. Click Edit.

7. Enter the required URL for this response, in the LyrisEmailResponseURL field.

8. Click Save.

Handling URL Click Events

Aurea CRM marketing activity email messages generated by the Aurea Campaign Manager can contain response URL links to capture response from the target group members. When a recipient clicks on an URL, Aurea Campaign Manager generates an Email click event. On receiving the Email click event from the CRM Sync Middleware, Aurea CRM records the response in the Mailings (BR) info area record for the target group member, for each marketing activity. The response recorded in the Mailing record for the marketing activity is based on the URL received in the URL click even. The response URL found in the response event data should exactly match the value set in the URL response. If there is no match the response is ignored.

While the user can send different responses set for a marketing activity, an event is generated by the Aurea Campaign Manager only for the first response. Subsequent responses are ignored by the Aurea Campaign Manager.

Viewing the Responses in the Mailings Info Area

When a message recipient clicks on a response URL, the response is recorded in the Mailings info area. The user can click on multiple responses and they are recorded. A maximum of five responses per recipient can be recorded in the Mailing Info area. Using the same example scenario described for specifying the response URL, we assume that the recipient clicks on two response links for Accepted, and Call to confirm.

To view the response for a marketing activity, perform the following steps:

1. Select Marketing > Mailings from the CRM menu. The Search Mailings page displays.

2. Enter the required search criteria and click Start Search. The search results displays.

3. Double click on the required Mailing record from the Search Results list. The Mailing page for the target group member and the marketing activity opens.

> **Note:** In the sample scenario the marketing activity was named Invitation and the Mailing page for this instance is named Mailing Invitation.

4. Click the Marketing Activity tab. The Responses from the target group member are listed in the Response 1 (Marketing Activity) field. This field can record up to five responses.

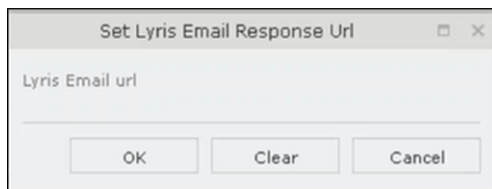In the sample scenario the user has clicked on two response URLs: **Accepted** and **Call to confirm**

Specifying a Response URL from the Campaign Designer

To specify response URLs for a marketing activity from the Campaign Designer, perform the following steps:

1. Click ▤ in the Accepted response. The context menu displays.

2. Select Set Lyris Email Click URL. The dialog displays.

3. Enter the required Response URL. For example, `http://www.aurea.com?response=Accepted`.

> **Note:** Use the Clear button to clear any long URL value set previously.
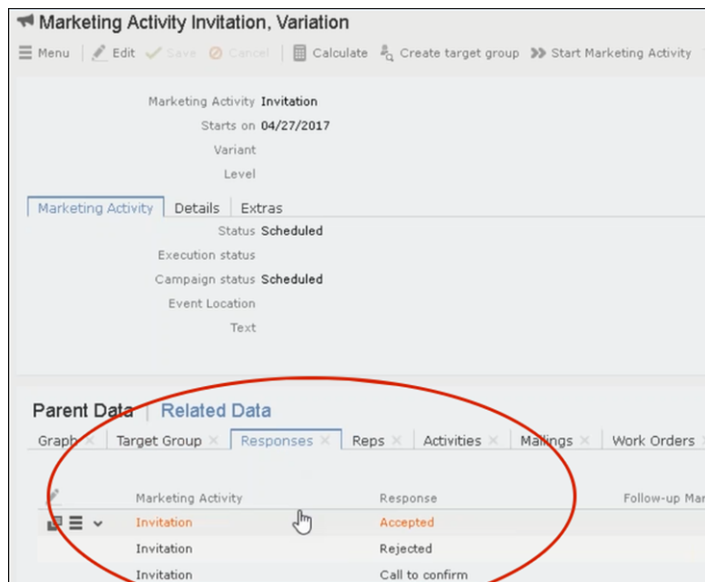
4. Click OK.

Specifying a Response URL from the Standard Editor

To specify response URLs for a marketing activity from the Standard Editor, perform the following steps:
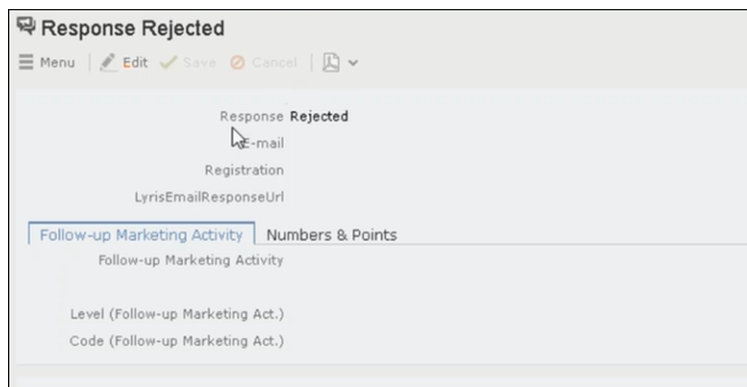
1. Select Marketing > Marketing Activities from the CRM menu. The Search Marketing activities page displays.

2. Enter the search filters and click Start Search. The search results list displays.

3. Open the context menu of the required marketing activity from the result list and select Tab View or Tree View. The Marketing Activity window displays.

> **Note:** Double clicking a marketing activity from the result list opens the marketing activity in the campaign designer.

4. Click the Responses tab. The configured responses are listed.

5. Double click on any of the response to open it. The following screenshot shows the Rejected response.

6. Click Edit.

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Aurea CRM marketing activity email messages generated by the Aurea Campaign Manager can contain response URL links to capture response from the target group members. When a recipient clicks on an URL, Aurea Campaign Manager generates an Email click event. On receiving the Email click event from the CRM Sync Middleware, Aurea CRM records the response in the Mailings (BR) info area record for the target group member, for each marketing activity. The response recorded in the Mailing record for the marketing activity is based on the URL received in the URL click even. The response URL found in the response event data should exactly match the value set in the URL response. If there is no match the response is ignored.

While the user can send different responses set for a marketing activity, an event is generated by the Aurea Campaign Manager only for the first response. Subsequent responses are ignored by the Aurea Campaign Manager.

Viewing the Responses in the Mailings Info Area

When a message recipient clicks on a response URL, the response is recorded in the Mailings info area. The user can click on multiple responses and they are recorded. A maximum of five responses per recipient can be recorded in the Mailing Info area. Using the same example scenario described for specifying the response URL, we assume that the recipient clicks on two response links for Accepted, and Call to confirm.

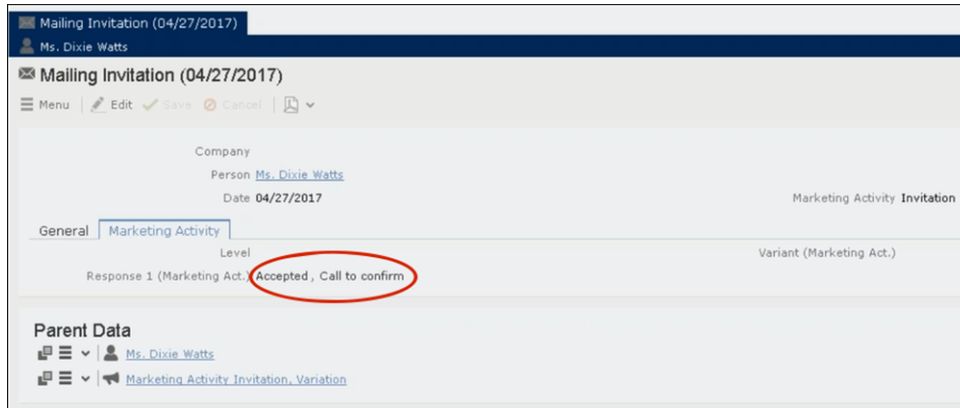To view the response for a marketing activity, perform the following steps:

1. Select Marketing > Mailings from the CRM menu. The Search Mailings page displays.

2. Enter the required search criteria and click Start Search. The search results displays.

3. Double click on the required Mailing record from the Search Results list. The Mailing page for the target group member and the marketing activity opens.

Note: In the sample scenario the marketing activity was named Invitation and the Mailing page for this instance is named Mailing Invitation.

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4. Click the Marketing Activity tab. The Responses from the target group member are listed in the Response 1 (Marketing Activity) field. This field can record up to five responses.
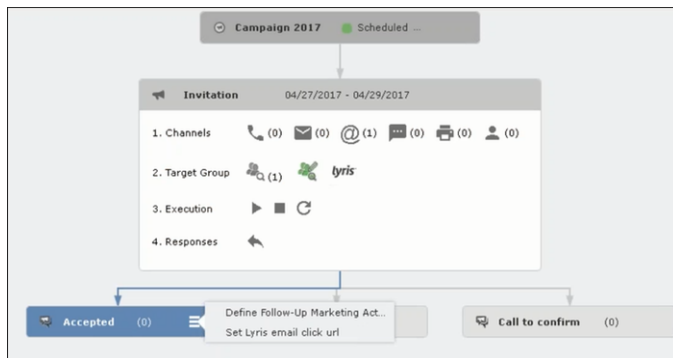

In the sample scenario the user has clicked on two response URLs: **Accepted** and **Call to confirm**
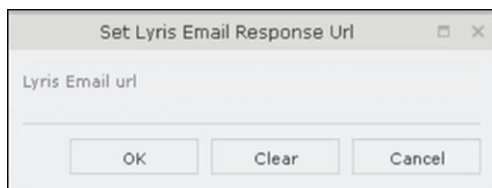
21

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.

12. Ask 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 ⊕ (**New**).

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 [icon] (**Marketing**) > **Lecture Subjects**.

2. Click on **Start Search** and then on ⊕ (**New**).

3. Enter details on the topic, such as the field, duration and whether the topic represents a lecture or training subject.

4. 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 ⊕ (**New**).

3. Select a lecture subject.

4. Save.

To assign a lecture subject to a speaker:

1. Select [icon] (**Marketing**) > **Lecture Subjects**.

2. Click on **Start Search**.

3. Open the desired lecture subject.

4. Click on ⊕ (**New**) on the **Speakers** tab.

5. Select the desired person.

6. 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 ⊕ (**New**).

3. Select the speaker:

   a. Click on 🔍 (**Select**) next to the **Person** field.

   b. Click on **Start Search**.

   c. Select the desired person.

4. Select the **Lecture Subject**.

5. Enter further information, such as the time and location.

6. Switch to the **Speaker** tab to enter further information such as the date of the invitation, the date of confirmation and fee.

7. Save the record.

Hotels and Venues

Add hotels, venues and other partners (e.g. catering, entertainment) as 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 ⊕ (**New**).

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 ![Marketing icon] (**Marketing**) > **Lecture Subjects**.

2. Click on **Start Search** and then on ⊕ (**New**).

3. Enter details on the topic, such as the field, duration and whether the topic represents a lecture or training subject.

4. 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 ⊕ (**New**).

3. Select a lecture subject.

4. Save.

To assign a lecture subject to a speaker:

1. Select ![Marketing icon] (**Marketing**) > **Lecture Subjects**.

2. Click on **Start Search**.

3. Open the desired lecture subject.

4. Click on ⊕ (**New**) on the **Speakers** tab.

5. Select the desired person.

6. Save.

Creating an Agenda

You can add an agenda for each campaign representing an event or track. Add agenda items to the agenda, such as lectures, coffee and lunch breaks, entertainment etc.

To add an agenda item:

1. Switch to the **Agenda Items** node in the campaign's tree view.

2. Click on ⊕ (**New**).

3. Select the speaker:

a. Click on 🔍 (**Select**) next to the **Person** field.

b. Click on **Start Search**.

c. Select the desired person.

4. Select the **Lecture Subject**.

5. Enter further information, such as the time and location.

6. Switch to the **Speaker** tab to enter further information such as the date of the invitation, the date of confirmation and fee.
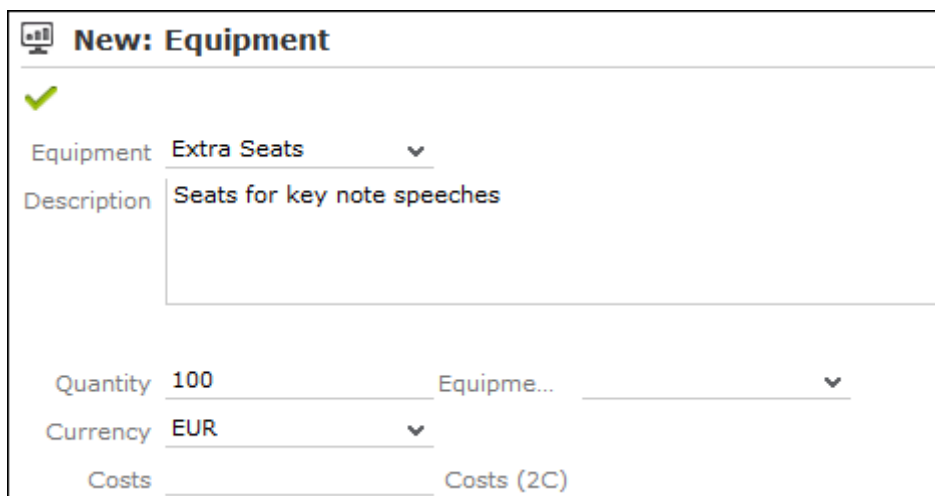
7. Save the record.

Verifying and Approving Events

Depending on your internal organization, events may require approval or verification.

Approval consists of two steps:

1. The rep submits the event for approval, see Requesting Approval/Verification 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.

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.

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 ⊕ (**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 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 ⊕ (**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 ⊕ (**New**).

4. Enter details on the participant, e.g.:

- Name

- The type of participant (e.g. participant), participation status (e.g. registered or confirmed)

- Enter information concerning the participant's registration date, any cancelations etc. on the **Registration** tab

- Enter information on the participant's accommodation on the **Hotel** tab, e.g. name of the hotel, type of room

- Enter information on the **Travel Information** tab such as the date of arrival and departure, mode of transportation, whether a transfer is required etc.

5. Save the record.

Creating a Participant Program

To create a program for individual participants, add a participant program:

1. Click on the desired participant in the campaign tree.

2. Click on ⊕ (**New**) on the **Agenda Items** tab.

3. Select an agenda item.

4. Save.

Alternatively, add the participant to the agenda item:

1. Click on the desired agenda item in the campaign tree.

2. Click on ⊕ (**New**) on the **Attendees** tab.

3. Select the participant.

4. Save.

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.
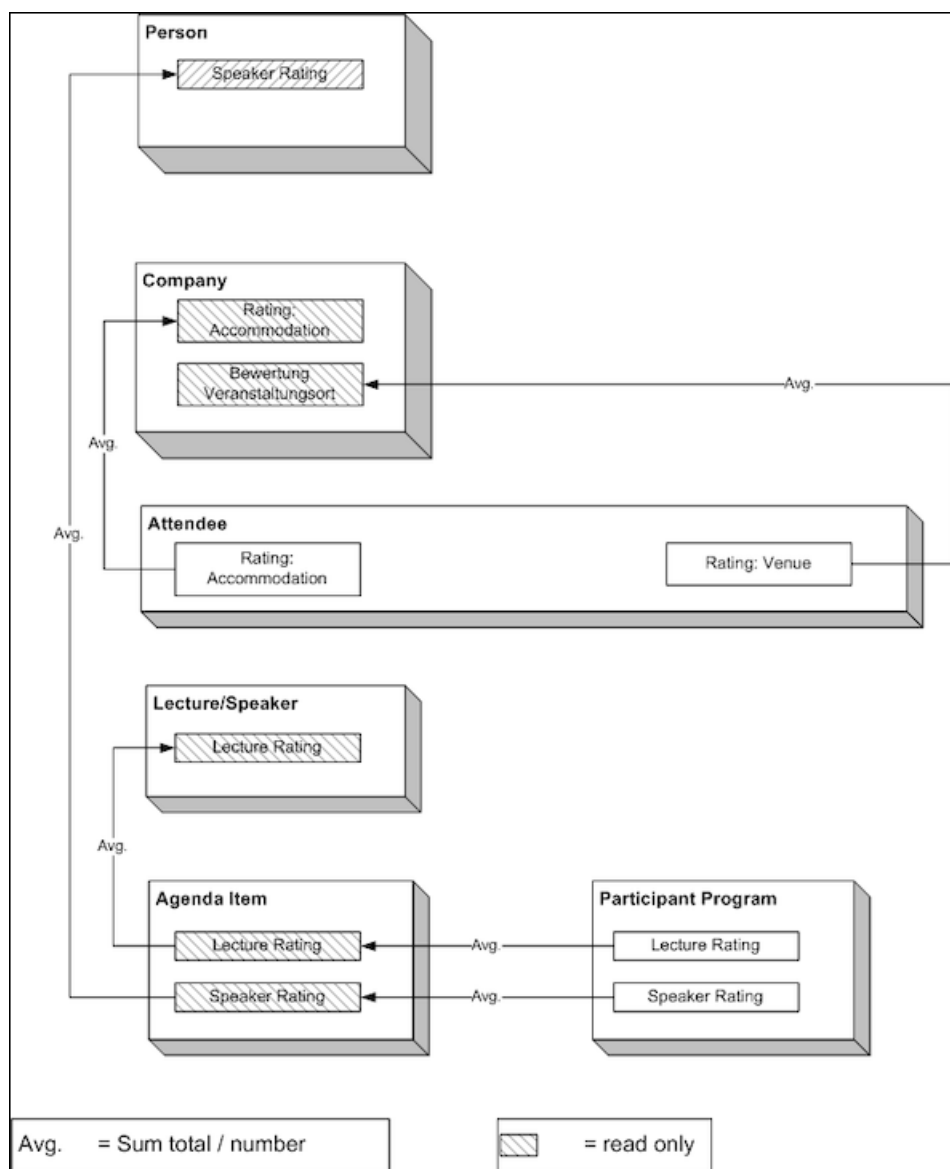
To calculate the rating:

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.
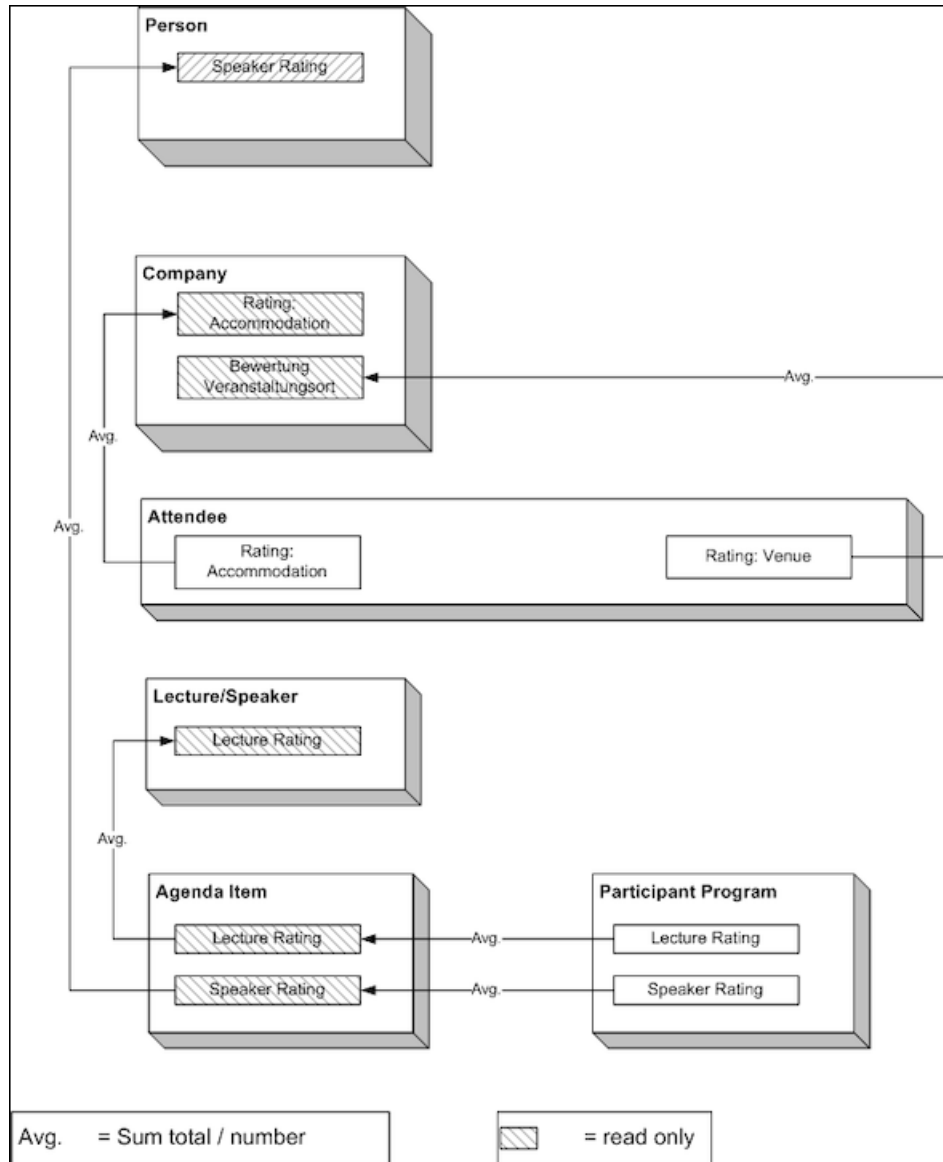
To calculate the rating:

1. Select ![icon] (**Marketing**) > **Calculate Lecture/Speaker Rating** or ![icon] (**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 in-quiries.

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.

*   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, >> 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.

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 > **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 > **Bulletin Board**.
2. Click on ⊕ (**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 🔍 (**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 ⊕ (**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 ⊕ (**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 (**Sales**) > **Bulletin Board**.

2. Click on ⊕ (**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 🔍 (**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 ⊕ (**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.

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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 documentedand 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.

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.

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 ⬤ (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.

The Sunshine Act report includes data taken from the following areas:

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 Sunshine 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 reporting 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 activity's end date (**Ends on** field) is within the reporting period **Costs: Hospitality (actual)**, **Costs: Hotel (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

Sunshine Act Data	Source
Other consulting expenses	**Other speaker costs (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
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

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.