Customer Relationship Management

Crm

CRM Web Business Logic BTB

Version 14.1

Aurea

Unlimited Possibility

Notices

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Chapter 19: Customer Service...580

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 at https://help.aurea.com/crm/#.

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

1

General Functions

Aurea CRM web

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

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

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

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

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

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

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

Login

You can access data in Aurea CRM according to your user rights. You need to log on with your user name and password. You can change your password later, >> Changing Passwords on page 66.

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, >> Changing Passwords on page 66.

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

To start Aurea CRM web:

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

> **Note:** Please ask your administrator for the correct address.

The **Login** page is displayed.

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

2. Enter your user name and password.

3. Click on **More Options** to select a different language.

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

4. Click on **Log In**.

   Your personal start page is displayed.

Selecting Roles

Your administrator can define roles and assign specific access rights to them, >> Roles and CRM Processes on page 19. 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**, enter your password, and click **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 **OK** to login.

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

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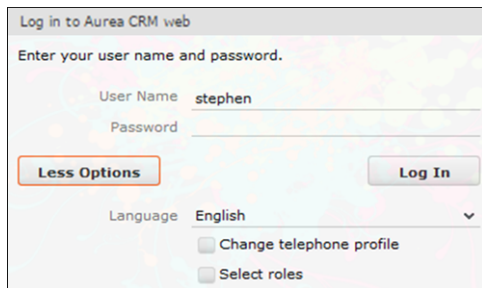
If you also have access to CRM.phone, you can switch between profiles if several profiles have been defined for you. The selected profile is only active for the current session; next time you log on to Aurea CRM web, your default profile will be used again.

The name of the telephone profile in use is displayed in the system information, >> System Information on page 67.

To change your telephone profile:

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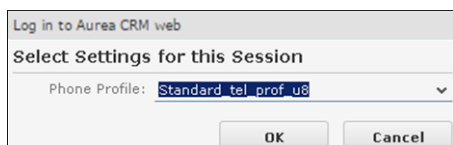
    Further options are displayed.

    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.

Adding your Telephone Profile as a Bookmark

Your administrator can determine that telephone profiles can be specified in Aurea CRM's URL. For example, a sales rep may require different telephone profiles for desk work and when in the field. The appropriate URLs can be stored as bookmarks in your browser. Select the bookmark to start the application using the corresponding telephone profile.

Logging Out

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

The login screen is then displayed again.

Roles and CRM Processes

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

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

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

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

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

- Your role may grant you the right to add new activities or edit existing ones, for example.

- If you are not permitted to execute a particular function, the corresponding buttons or menu options are unavailable.

- If your role only grants read access to certain info areas, you will be unable to edit data in these areas.

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

Example:

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

Info Areas

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

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

Info areas can be independent (i.e. have no parent info areas, such as the **Company** info area) or be a child of another info area. Records in child info areas must always be added to a record in the parent info area, e.g. an activity must always be added for either a person or company, >> Adding Records on page 87.

User Interface

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

Areas

The Aurea CRM web user interface consists of:

• The sidebar (on the left)

• The working area (to the right)
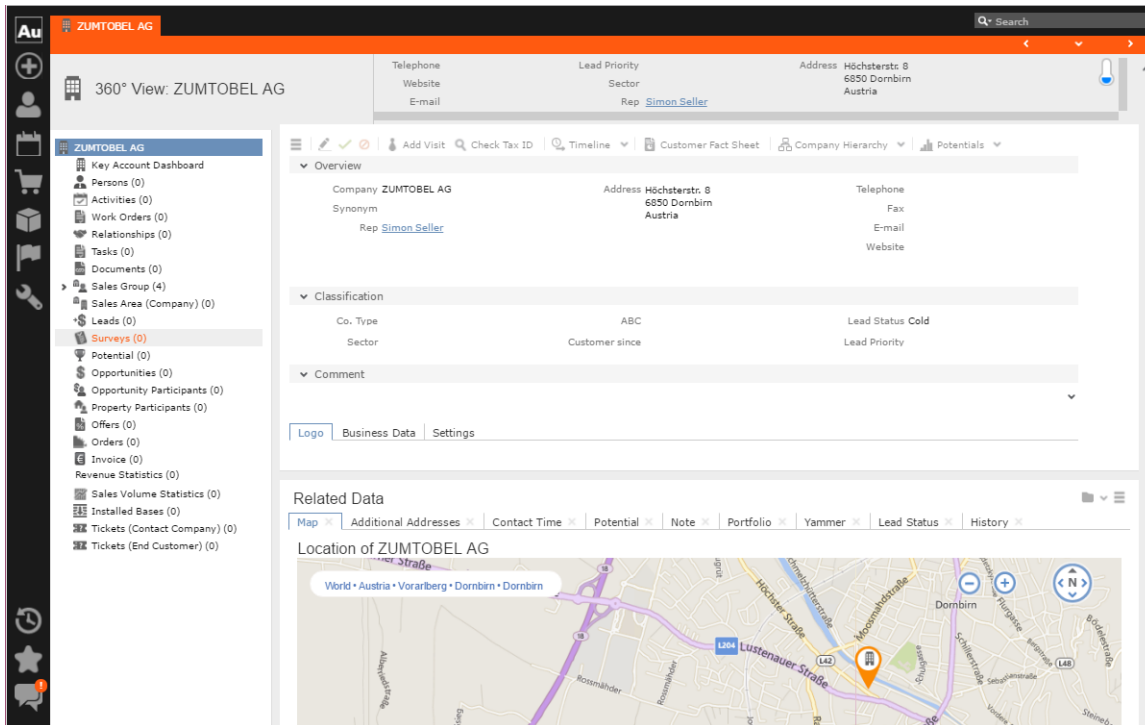
Start Page

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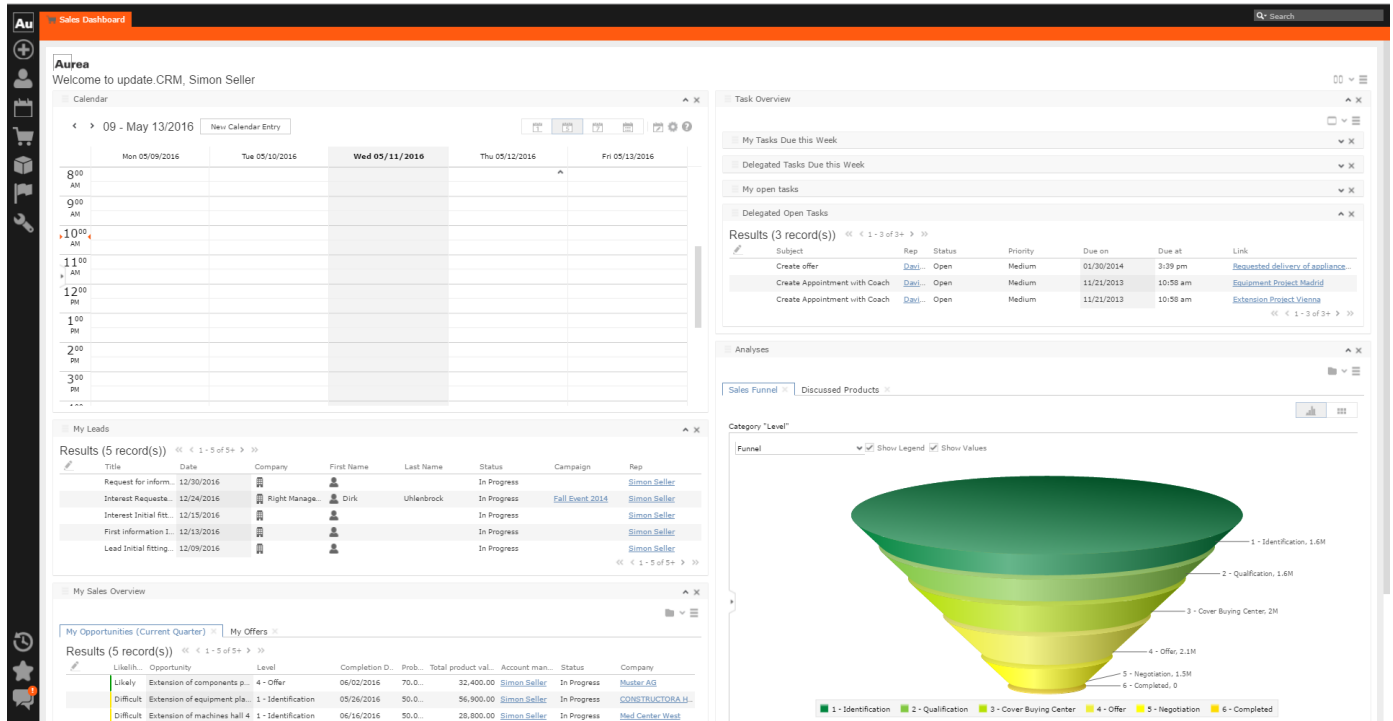
The start page's content depends on your current role (e.g. the start page for marketing employees is different from that for service technicians) and the configuration defined by your administrator. The above screenshot is a sample start page for an employee in sales.

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, >> Changing the Order of Elements on the Start Pages and in Related Data on page 45.

Sidebar

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

Aurea CRM Menu

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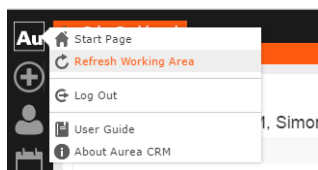
- **Start Page**: Switches to Aurea CRM web's start page.
- **Refresh Working Area**: Refreshes the current screen.
- **Log Out**: Closes Aurea CRM web. For security reasons, always exit Aurea CRM web using this option.
- **User Guide**: Opens the user manual.
- **About Aurea CRM**: Displays information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

Navigation

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

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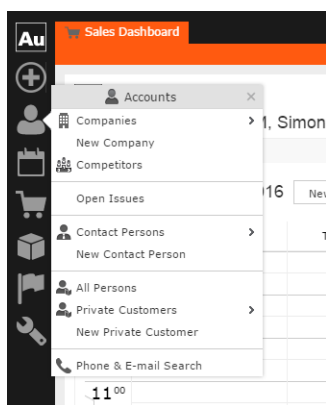
History

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

Note: The history is only saved if you log out using the **Log Out** option in the Aurea CRM menu and the **Save history** option is enabled in your user settings, >> Handling Tab on page 63. 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, >> Layout Tab on page 63.

To access an entry in your history:

1. Click on (**History**).
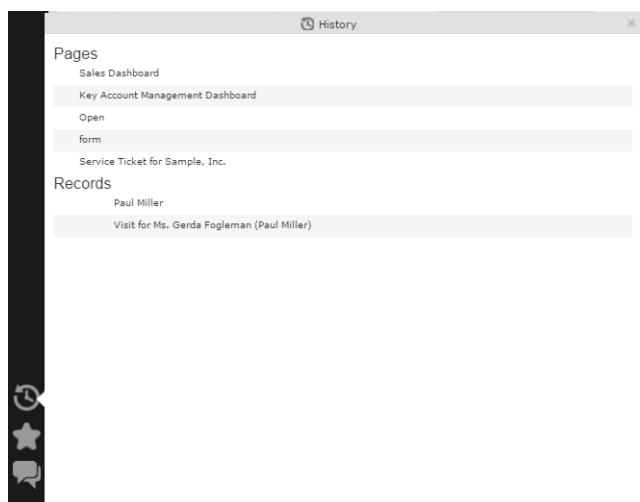
Your history is divided into two sections:

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

2. You can also navigate in the history.

Note: Depending on your configuration, you can also access the records you have opened recently from the corresponding menu, >> Editing, Viewing and Deleting records on page 98.

Favorites

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

Quick links are also displayed here, >> Customizing Quick Links on page 26.

Displaying your Favorites

To view your favorites list:

1. Click on ![star icon] (**Favorites**).

   Your favorites are displayed.

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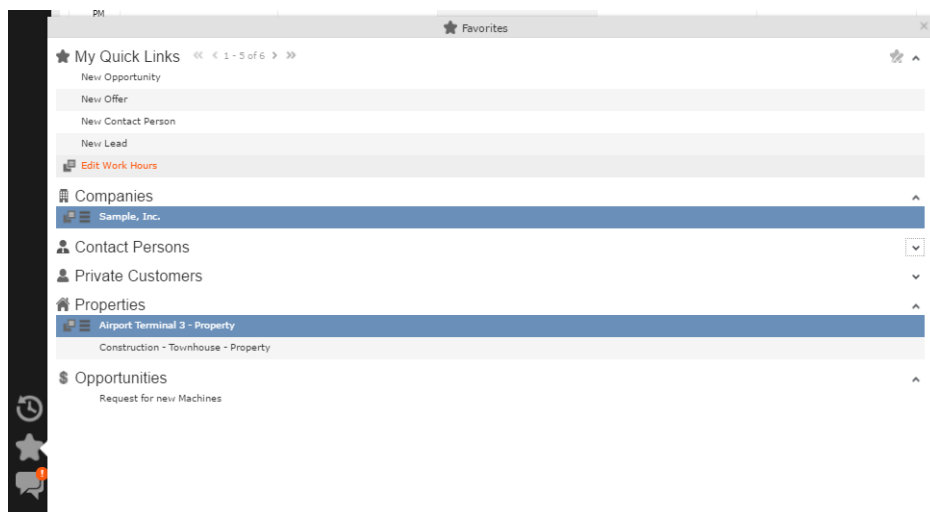
2. You can access the context menu (☰) and quick view (⬚) for all entries in the list. Double-click on a record to open it in the default view.

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):
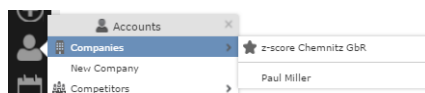
Adding Records to your Favorites

To add a record to your favorites:

1. Switch to the desired record, >> Searching on page 69.

2. Select **Add to Favorites** from the record's context menu.

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

Removing Records from your Favorites

To remove a record from your favorites:

1. Either:

   • Open your favorites

   • Switch to the desired record

2. Select **Remove from Favorites** from the record's context menu.

   The selected record is removed from your favorites.

Quick Links

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

Customizing Quick Links

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

To add quick links:

1. Click on ![star icon] (**Favorites**).

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

   The **My Quick Links** dialog is displayed.
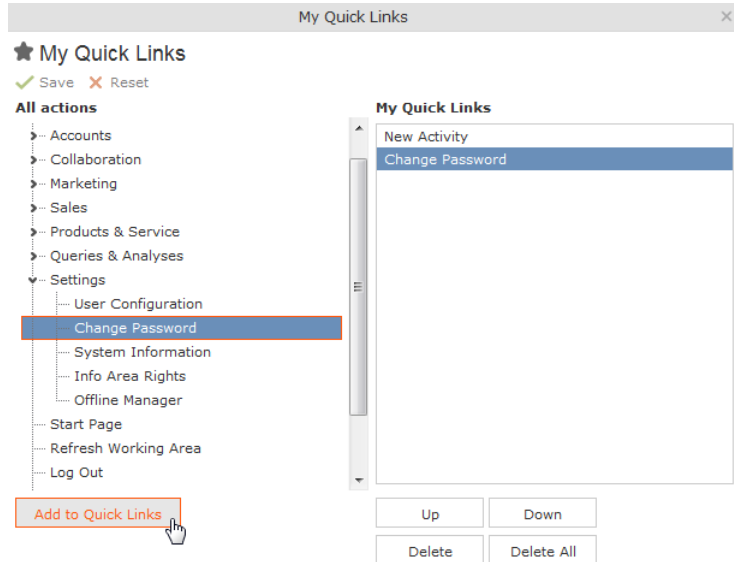
3. Click on the ➤ icon under **All actions** next to one of the sections.

   All available menu options are displayed.

4. Select an entry and click on **Add to Quick Links**.

   The entry is displayed under **My Quick Links**.

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

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

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

Inbox

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

To display your inbox:

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

   Your inbox is displayed.

The following tabs are displayed:

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

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

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

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

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

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

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

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

  exclamation mark ( ).

2. Switch to the desired tab.

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

Working Area

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

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

- Using the search, where you can use search criteria to define which records are displayed.

- Using your favorites, >> Favorites on page 25.

- From a query's results list, >> Queries on page 123.

- From your history of recently accessed records or search results, >> History on page 23.

Buttons

Buttons are available in Aurea CRM web:

- Buttons are displayed in the working area between the header and the record:
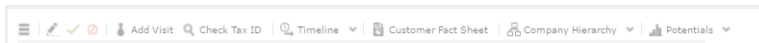
- Some buttons, e.g. **Save**, are only displayed following certain actions:

- 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 (>> Handling Tab on page 63):

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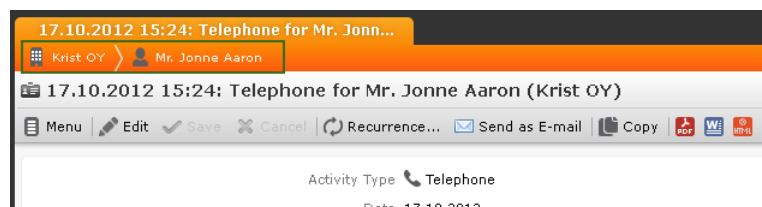
Click on a parent record in the breadcrumb trail to switch to that record.

Search Area

The search area is displayed whenever you open an info area from the menu (e.g. by selecting > Companies):
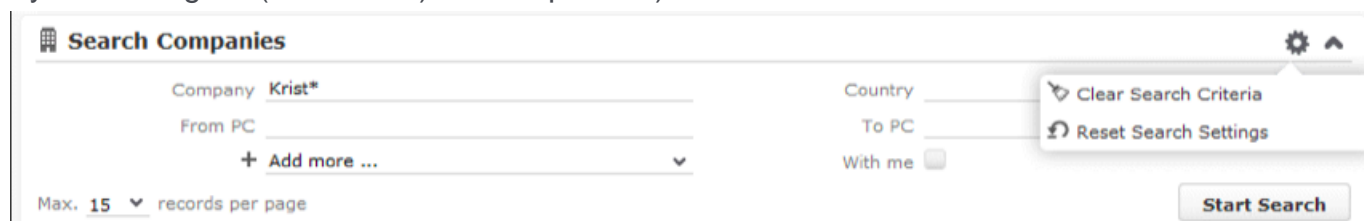
 The search area can be displayed or hidden as required using the Show and Hide (and) buttons.

If you have hidden the search area after performing a search, the header indicates whether filters are applied to the search: **Search Companies** ▼ A companies

- **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.

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 displays the information stored in a record, >> Tab View on page 32. In addition, child records are displayed under **Related Data**, >> Related Data on page 41.

• The tree view is only available in certain areas, and provides a hierarchical overview of related data. The tree view can depict multi-tiered hierarchies and you can edit child records, >> Tree View on page 35.

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

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

Tab View

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

To display a record in the tab view:

1. Select **Tab View** from the context menu in the results list.

   The record is opened in tab view. 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, >> Breadcrumbs on page 31.

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

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

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

Changing the Order of Tabs

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

Example:
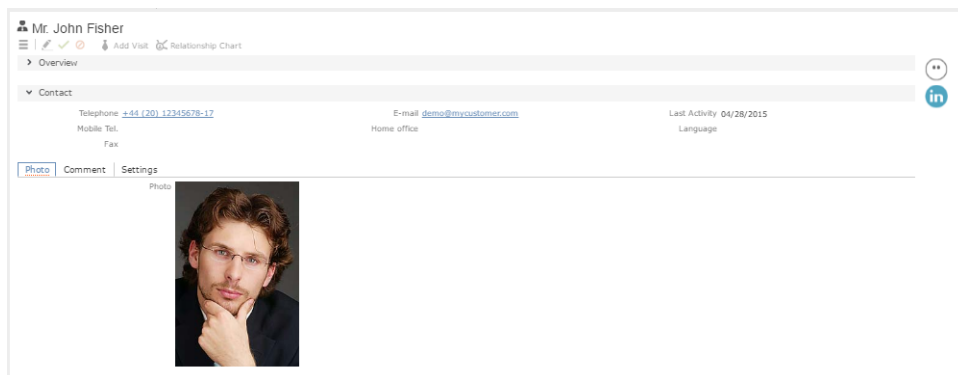
You can change each tab's position using drag & drop, for example drag the **Photo** tab to the right of the **Comment** tab, the tabs are rearranged as shown below:

You can also drag a tab to the upper area to display the contents of the tab as a group, e.g. dragging the **Photo** tab to the upper area changes the display as follows:
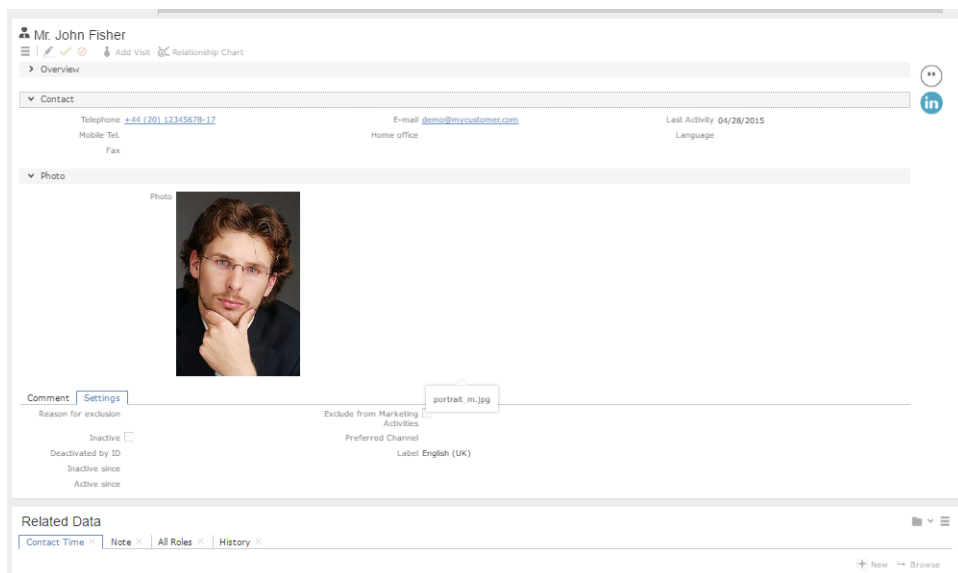
When moving a tab, the gray area indicates the tab's new position; release the left mouse button to place the tab in the new location. In the screenshot below, the grey square between **Comment** and **Settings** tab indicate the new location for the **Photo** tab.

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 offers stored for a person, and in turn all of the items in these offers.

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

To display the tree view:

1. Switch to the desired record and select **Tree View** from the context menu.

The record is displayed in the tree view.

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

The tree view displays related records in a tree structure. The details of the selected record in the tree are displayed to the right. The breadcrumb trail is also displayed, >> Breadcrumbs on page 31.

Example: Tree view for a company:

The selected record is highlighted in the tree view and you can edit the record in the details area, >> Editing Records in Tab View on page 98.

Note: Your administrator determines the maximum number of records per node in the tree. If more records are present than can be displayed, the entry "…" is displayed below the last record. Click on this entry to display further records (up to the maximum defined by your administrator). You can continue in this manner until you have displayed all available records.Your administrator can also determine that the ⟩ icon is always displayed, or only if child records are present.Select **Display all records** from the context menu to display all related records in an info area (and not only the predefined number). This can however be a very time-consuming process when working with large volumes of data.

Quick View

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

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

To display the quick view:

1. Either:

- Click on 📧 (**Quick View**) in a list.

- Click on a link in a list or on a tab and keep pressing the mouse button ("long click").

The quick view is opened:

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

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

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

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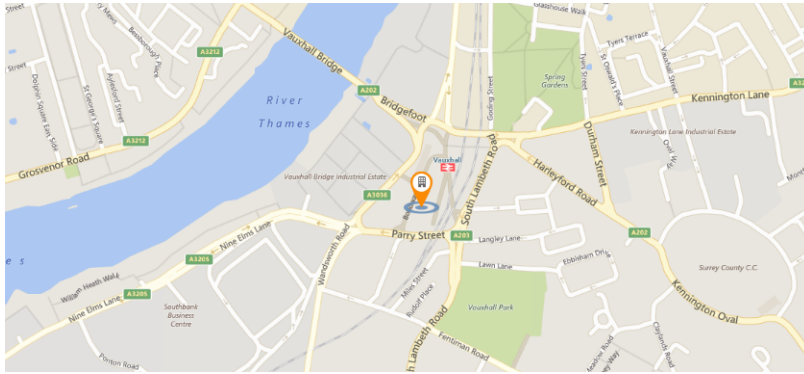
If fields are available that contain geographic coordinates, this data is used to display the location (even if the coordinates differ from the address). If no geographic coordinates are available, the address data entered in the database is used to determine the location.

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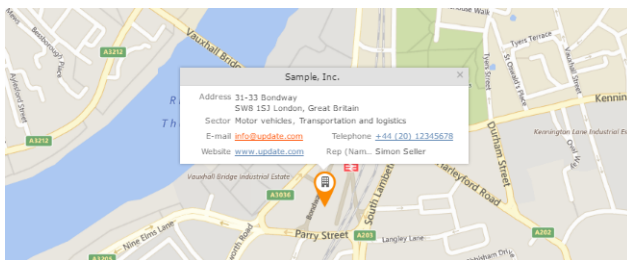
The map view for activities or calendar entries displays records at the location of the person or company the activity was added for.

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

Displaying Multiple Addresses on the Map

Your administrator can define that you can select multiple entries in results lists or the calendar and display these entries on the map. This makes it easier for sales reps to plan their route for the day, for example.
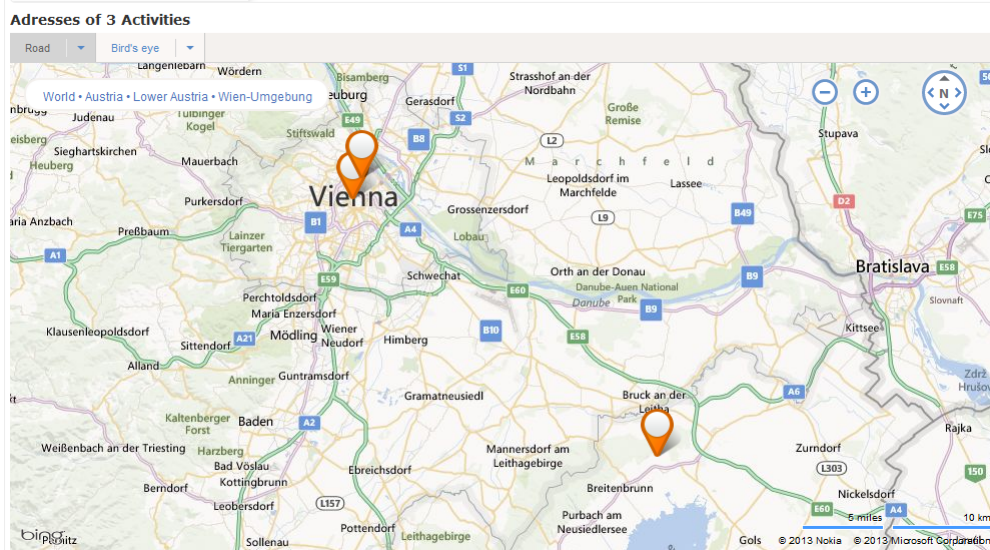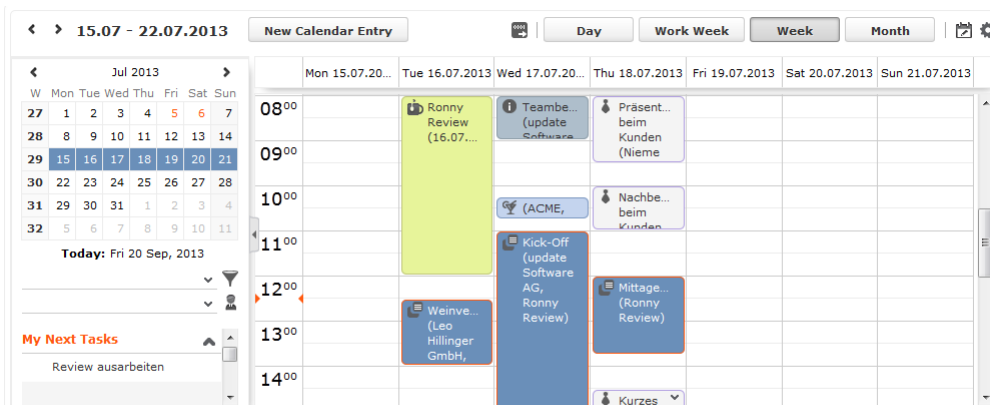
The header in the map displays the number of activities displayed on the map.

Lists

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

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

- ▦ (**Quick View**): Displays the quick view, >> Quick View on page 36.

- ☰ (**Show Menu**): Displays the record's context menu, >> Context Menu on page 47.

- ⌄ (**Display Details**): Displays the record's details, >> Displaying Details on page 40.

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**, >> Editing Records in List View on page 100.

Switch between pages of results using the arrows above and below the results list (16 - 30 of 45+), >> Navigation Bar on page 29.

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, >> Related Data on page 41.

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

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

Displaying Details

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

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

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

Color Codes and Icons in Lists

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

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

Examples:

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

Total Lines

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

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

Related Data

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

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

You can customize the view of related data, >> Changing the Order of Elements on the Start Pages and in Related Data on page 45.

You can edit related data by opening the record in tab view or directly in a list, >> Editing Records in List View on page 100.

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

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

2. Click on the corresponding tab.

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

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:
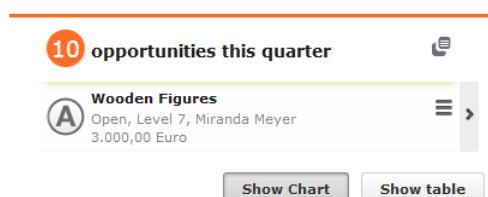
The live tile consists of two elements:

* 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 in ☰ (**Show Menu**) to open the record's context menu.

  * Double-click on the record to open it in tab view.

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

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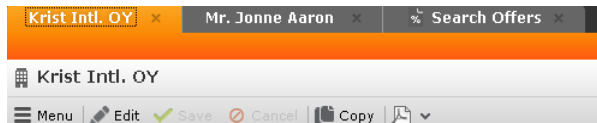
2. Click on a tab at the top of the screen to switch to that tab.

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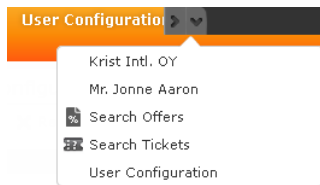
Select an entry from the list to switch to that tab.

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.

Rep <u>Adam Aussendienst</u>

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

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

Assigning Icons to Links

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

Example:

If you have entered links to contact persons' Facebook or XING profiles, the platform's logo can be displayed instead of the URL.

The following social media icons are available by default:

Context Menu

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

You can access the context menu in the following ways:

- Click on ☰ (**Menu**).
- Press Ctrl+M on your keyboard in the tab or tree view. You can also use the cursor keys to navigate within the menu.
- Hold down Ctrl and click on an entry in the context menu to open the corresponding view in a new tab within the current window, >> Displaying Records in Multiple Tabs on page 44.

The following screenshot shows the context menu for tickets:
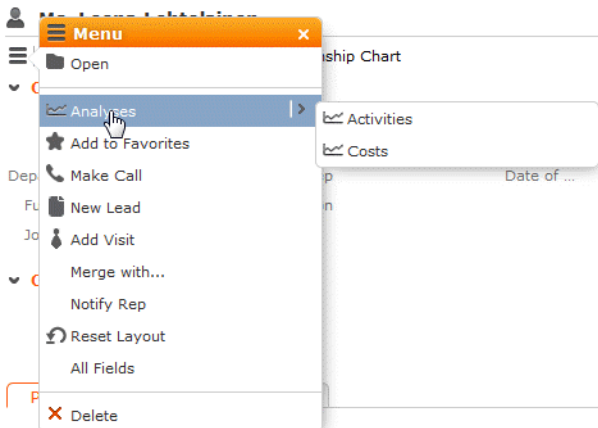
The menu contains further sub-menus which are displayed automatically when the cursor is positioned over the relevant menu entry:

Tab View	Displays the selected record in the mask view
Tree View	Displays the selected record in the tree view
Delete	Deletes the selected record
Add to Favorites	Adds the selected record to your favorites
New	Adds a new linked record. Use the sub-menu to determine which kind of record to add.
Go to All Related	Displays related records. Use the sub-menu to determine which kind of related records to display.

Date Picker

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

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

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

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

Sundays and holidays are color-coded according to the holidays defined in the calendar selected in the settings, >> Date & Time Tab on page 65.

Field Types

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

Your administrator can define the following for fields:

• Keyboard shortcuts used to navigate directly to a specific field.

• The field formatting, which can differ depending on the field's content, e.g. negative numbers can be displayed in red.

• Whether catalog and percentage fields are displayed graphically or numerically, >> Displaying Percentage and Catalog Fields Graphically on page 54.

Text Fields

You can enter strings containing any characters in text fields.

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

Numeric Fields

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

Catalog Fields (Drop-down Lists)

Catalogs are displayed as drop-down lists.

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

Your administrator can determine how catalogs are sorted:

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

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

To select an option from a drop-down list:

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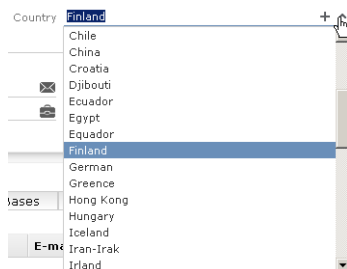
2. Select the option you want to enter in the field. Alternatively you can navigate in the drop-down list by typing the first character (e.g. typing 'F' will highlight the "Finland"entry). If you select a value, the drop-down list is closed.

Adding Catalog Values

To add catalog values:

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

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

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

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

    The new entry is displayed at the end of the list. The catalog is only sorted alpha-betically 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.

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

To enter multiple catalog values:

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

2. The drop-down list is displayed.
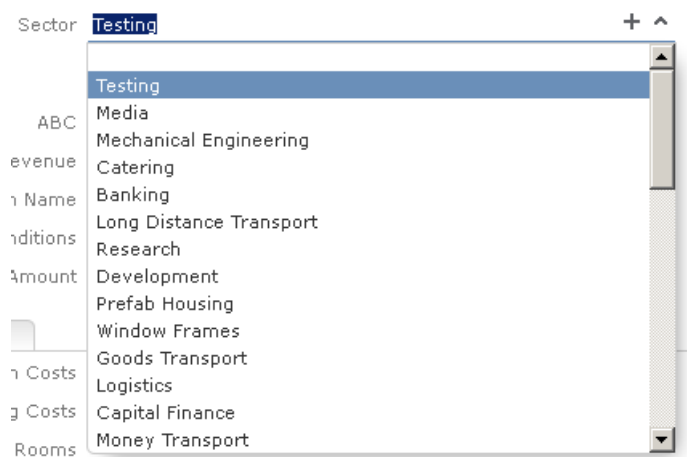
3. Select the desired entry.

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

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

Date Fields

You can enter the date in date fields directly or use the pop-up calendar, >> Date Picker on page 48.

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

• Digits

• The date separator defined in your user configuration, >> Date & Time Tab on page 65.

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

Use the Date Picker to select the desired date, >> Date Picker on page 48.

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.

Note: To disable auto-completion of the year field, contact your update administrator.

Time Fields

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

- Digits
- The time separator defined in your user configuration, >> Date & Time Tab on page 65.
- "am" and "pm" if you are using the 12 hour format.
- Spaces

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

Rep Fields

Reps are selected using rep fields. You can either select a rep from a dialog box listing all reps, or enter a portion of the rep's name in the field, >> Selecting Reps on page 109.

Mandatory Fields

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

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

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

!Type	�ò Visit ⌄
!Subject	
!Starts on	10.10.2013 ⌄

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

Boolean Fields

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

Link Fields

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

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

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:
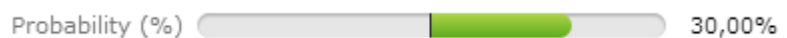
To enter a percentage value:

- 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:
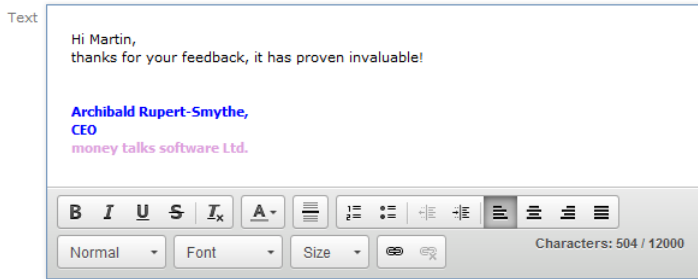
Field Data Types

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. Z-fields (also known as "virtual fields") do not exist in the database. (Examples: reference fields, fields that contain links to other records, rep fields, rep group fields, 2nd currency fields, external match-up fields etc.).

  Z-fields cannot be added as search fields or used for defining filters and queries.

  The content of a Z-field is not updated in lists if the target record is updated by another process. Workaround: Instead of the Z-field add a linked field of the target record to the list. Example: Instead of using the **Company** field (MA:76), add the **Company** field from FI as linked field to the MA List control.

Displaying Content from Multiple Fields in a Single Field

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

Address Vorgartenstraße 40
1020 Wien, Austria

The fields are displayed separately in edit mode:

Street Vorgartenstraße 40
Postal Code 1020   🔍 ✕
City Wien
Country Austria   ✛ ˅

Field Help

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

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

Example:

Company Megabucks FC

Name of the company

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

Write-protected Records and Field Access

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

Access to data is indicated as follows:

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

You can only move the cursor to those fields that you are allowed to 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, >> Inbox on page 27.

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

System Lock Messages

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

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

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

Sending E-mails

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

- Click on an e-mail address in a customer record to send an e-mail to that address.

- Click on ✉ (**Send as E-mail**) in a record.

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

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

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

   - Subject: The activity's subject

   - Text: The contents of the **Text** field in the activity record.

When sending e-mails via the server:

- All linked documents are included as attachments

- The e-mail is sent automatically; you cannot edit it

- Unicode characters are supported

When sending e-mails from your client:

- No attachments can be sent

- HTML mails are not supported

Notifying Reps

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

To notify reps:

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

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

   The following dialog box is displayed:

3. The following recipients are suggested by the system:

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

- Cc: All required participants

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

4. You can enter **Additional internal recipients**, >> Selecting Reps on page 109.

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 update.CRM web link, Insert update.CRM win link, Request a delivery Receipt** and **Request a read** receipt check boxes.

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

8. Click on

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

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

Hiding/Showing the CRM.phone toolbar

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

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

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

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

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

Touch Devices

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

If you are using a touch device that also supports a mouse, you can choose whether to use the mouse, your fingers, or both. 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

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

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, >> Layout Tab on page 63.
   - Handling, >> Handling Tab on page 63.
   - Activities, >> Activities Tab on page 65.
   - Date & Time, >> Date & Time Tab on page 65.

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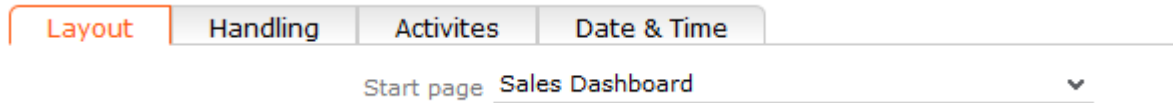
- **Start page:** Select the start page here; i.e. the page that should be displayed after you have logged on to Aurea CRM web. You can choose to display generic pages (e.g. the company search) as well as predefined start pages (e.g. marketing home page, sales home page).

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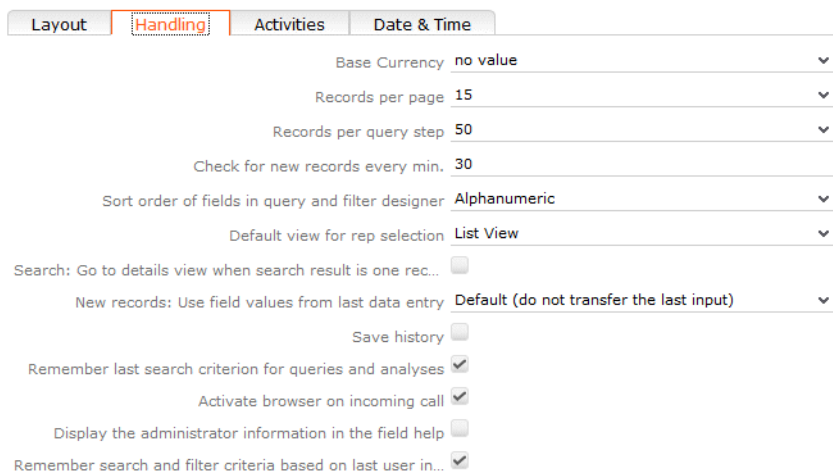
Use the **Handling** tab to configure the following:

- **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, >>

- **Records per query step**: The number of records returned by the server for each request.

- **Check for new records every min:** Enter the frequency with which Aurea CRM web checks for new records such as reminders or messages.

- **Sort order of fields in query and filter designer:** Use this option to determine the order that fields are listed in when creating filters or queries. The entries can be sorted alphabetically or using their index.

- **Default view for rep selection**: Determines the default view used to select reps. You can choose between list view or tree view.

- **Search: Go to details view when search result is one record:** Enable this check box to automatically switch to the detailed view if a search only returns one record.

- **New Records: Use field values from last data entry:** Determines whether the data entered in the last record added is automatically transferred to subsequent new records:

  - **Default (do not transfer the last input)**: No data is entered in new records.

  - **Use all values from last data entry:** The data in the last record you have added is automatically entered.

  - **Use admin-defined values from last data entry:** Your administrator can define fields whose values are set to the value entered in the last new record.

- **Save history:** Determines whether the history is saved and available the next time Aurea CRM web is started, >> History on page 23.

- **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

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

To change your password directly from within Aurea CRM web:

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

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

3. Click the **Change Password** button.

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

System Information

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

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

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

   The system information dialog box is displayed.

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

⚙ System Information

User	MARIA
Rep	Miranda Meyer
User Group	10000007
Station number	100
Rights	Historisierung IB
Roles	No roles assigned
Configuration	[User_MARIA_ChildOf_UPDATE_DEFAULT (#100024)] [UPDATE_DEFAULT Offline (#6)] [UPDATE_DEFAULT (#0)]
Phone Profile	Standard_tel_prof_u8
Language	English (language eng , sub language 200)
Browser User Agent	Mozilla/5.0 (Windows NT 5.1; rv:16.0) Gecko/20100101 Firefox/16.0
Active Sessions	634
Server Path	http://updevweb02.update.com:80
URL Path	http://updevweb02.update.com:80/update.web/v8.sp0/v00.x64/bb/
Application Path	/update.web/v8.sp0/v00.x64/bb/
Document Path	C:\inetpub\wwwroot\update.web.v8.sp0\v00.x64\bb\web\..\web.data\upload
Version	BTBi 8.0.407.46277 (MSSQL)
web Version	8.0.1511.46319
Date Format	%D.%M.%Y
Time Separator	:
Decimal Separator	,
Patches	BTBi 8.0.407.46277 (MSSQL)

Plug-ins		
	update.Lib.Services 8.0.1601.46319 update CRM Common Library Services	**update.Configuration 8.0.1601.46319** update CRM designer Configuration Business Logic Layer
	update.Crm.Base 8.0.1601.46319 update CRM Business Logic Base Layer	**update.Crm 8.0.1601.46319** update CRM Business Logic Layer

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

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

Info Area Rights

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

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

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

Info Area Rights « ‹ 1 - 20 of 190 › »

« ‹ 1 - 20 of 190 › »

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

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

Searching

In many cases, the search function provides the starting point for accessing the data you require. You can define search criteria to restrict the amount of results returned by the search so as to quickly access the data you need. You can search for records from multiple catalogs, by selecting them from the list of fixed and variable catalogs.

Search Area

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

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

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 filter icon indicates whether filters are applied to the search, as shown in the screenshot below.

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

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

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

Searching For Data

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

The most important fields are included in the search mask by default. You can however add other fields in order to further restrict your search. Which fields you are 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 will include "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" will only deliver results if there is a company whose name corresponds exactly to "Aurea").

To search for records:

1. Switch to the search area.

2. Enter your search criteria.

3. Your administrator can determine that you can access the **With me** option to restrict the results to those records where you are entered as the rep.

4. Choose the number of results to be displayed on a page of the results list. The maximum is 50.

   You can define the default number of records per page in the user configuration, >> Handling Tab on page 63.

5. Click the **Start Search** button. The results of your query are displayed in the results list below the search area, >> Results List on page 80.

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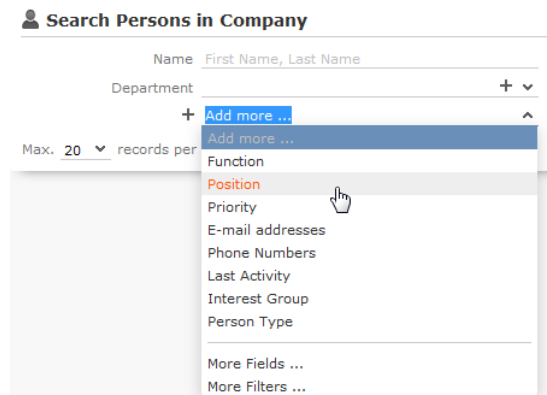
2. Select the desired field and click on **+** (**Add**) to add the field to the search mask.

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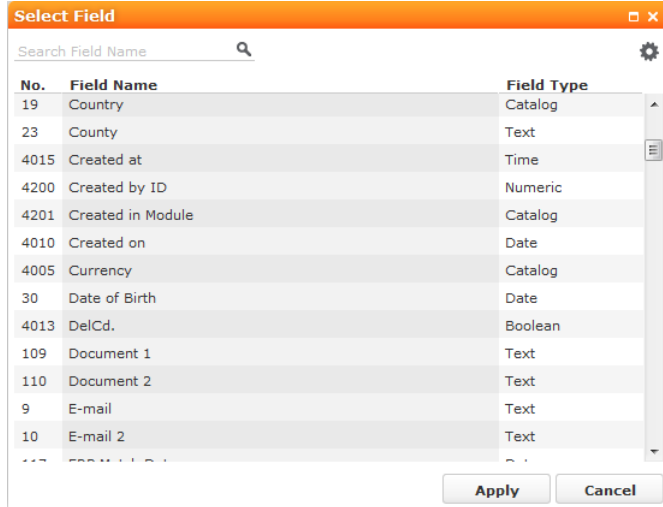
4. Select the desired field and click on **Apply**.

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.

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.

Phonetic Search

Your administrator can determine that you can search the database for similar company and person names based on their sound. Certain letters are treated as similar-sounding by the system, allowing you to search for similar names such as "Wild" and "Wilde".

If the phonetic search is available for a field, ◀ (**Phonetic Search**) is displayed next to it. Click on the icon to use the phonetic search for that field. The icon changes to ◀).

Note the following:

• The phonetic search is based on international phonetics, and does not take English spelling into account. It also ignores the idiosyncrasies of English spelling.

• You can enter sub-strings as search terms.

• Vowels are completely ignored by the search, and only consonants play a role. Consonants are divided into categories based on phonetic similarity:

  • B=F=P=V

  • C=G=J=K=Q=S=X=Z

  • D=T

- M=N
- vowels=W=Y=H.

- To search for compound names, enter both names. A single name is not enough to find a compound name.

- You can only search phonetically in one field at a time; if the phonetic search is available for multiple fields, you need to choose which field to enable the phonetic search for.

- Placeholders such as '*' cannot be used in the phonetic search, i.e. entering "Wil*" in the phonetic search will not return "Wilde".

Selecting Records

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

You can edit the selected record directly in the list, open the record in the tab or tree view or display additional details in the details view, >> Tab View on page 32 and Editing Records in List View on page 100. Child records related to the selected record are displayed under **Related Data**, >> Editing Records in List View on page 100 and Tab View on page 32.

Filters

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

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

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

+ Filter: Companies in Vienna ⌄

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

Selecting Filters

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

To select a filter:

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

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

The filter is applied when searching.

Defining Filters

To define a filter:

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

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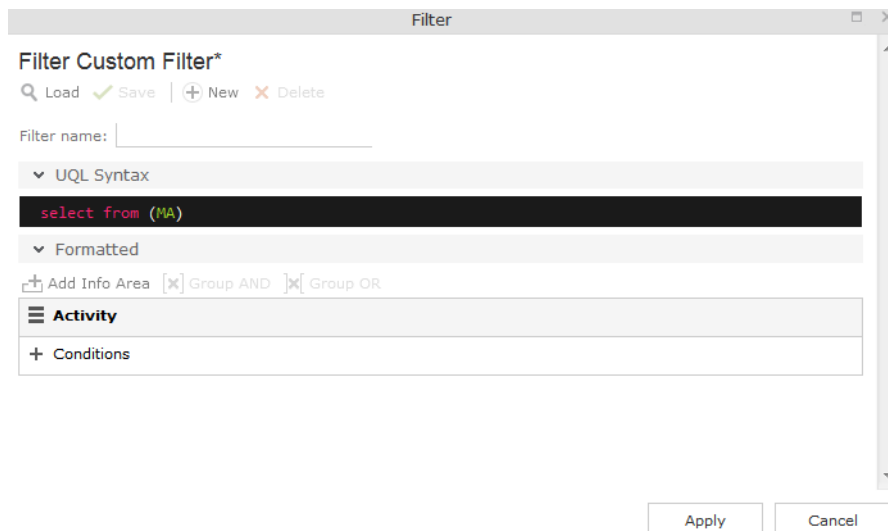
2. Click on ⊕ (**New**) to define a new filter. Click on **Load** to load an existing filter.

You can define filters in two ways:

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

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

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

   The **Select Fields in Info Area: <Info Area>** dialog is displayed. All available fields in the info area are listed.
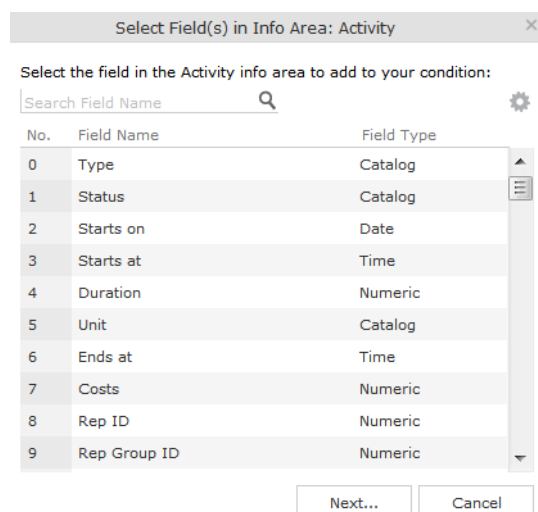
4. Click on a column heading to sort the list by the entries in that column.

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

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

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

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

   You can also search for fields by field number.

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

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

- Text fields, >> Conditions for Numeric, Alphanumeric and Time Fields on page 139

- Date fields, >> Conditions for Date Fields on page 138 and Variable Conditions on page 140

- Catalog fields, >> Conditions for Catalogs on page 135 and Conditions for Child Catalogs on page 137

- Numeric fields, >> Conditions for Numeric, Alphanumeric and Time Fields on page 139

- Boolean fields, >> Conditions for Boolean Fields on page 138

- Time fields, >> Conditions for Numeric, Alphanumeric and Time Fields on page 139

- Rep fields, >> Conditions for Rep Fields on page 139 and Variable Conditions on page 140

9. Click on **OK**.

   The filter you have defined is displayed:
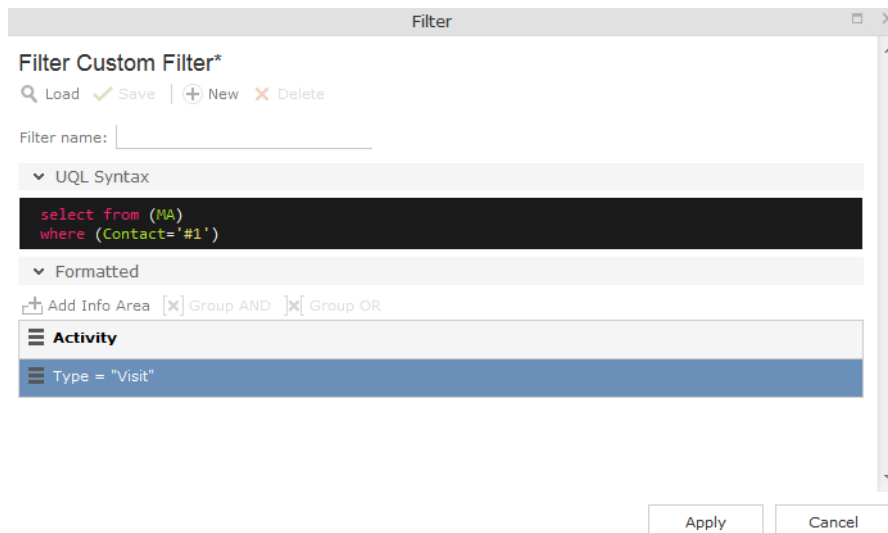
10. Define any additional conditions:.

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

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

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

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

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

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

All results are listed.

Adding Info Areas

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

To add an additional info area:

1. Load the desired filter, >> Selecting Filters on page 74.

2. Click on ⬏ (**Add Info Area**).

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

---

3. Select the desired info area or enter a portion of its name in the **Search Info Area Name** field. Click on **Select**.

4. A dialog is displayed. Select the type of relationship between the two info areas.

5. Enable the **Optional** check box to link these conditions to conditions applied to other child areas with a logical OR. Records are returned if they meet all non-optional conditions and at least one optional condition.

6. Click on **Continue**.

   The filter you have defined is displayed:

Quick Search

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

To start the quick search:

1. Click in the search field and enter your search criteria. The "Find as you type" function immediately lists matching records:
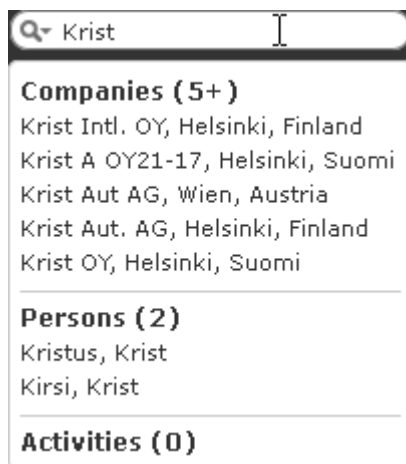
A maximum of 5 hits per info area are displayed in the quick search. Click on the number next to the info area name (**5+**) to display all hits.

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

3. Click on to define the info areas that are searched in.

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

Results List

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

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, >>

Note: If only one record is found and the **Search: Go to details view when search result is one record** option is enabled in the user settings, the record is automatically opened in tab view, >> Handling Tab on page 63.

Viewing Deleted Records in the Results List

Deleted records are not displayed by default in the search result list. Click the DisplayDeletedRecords ( ) 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.
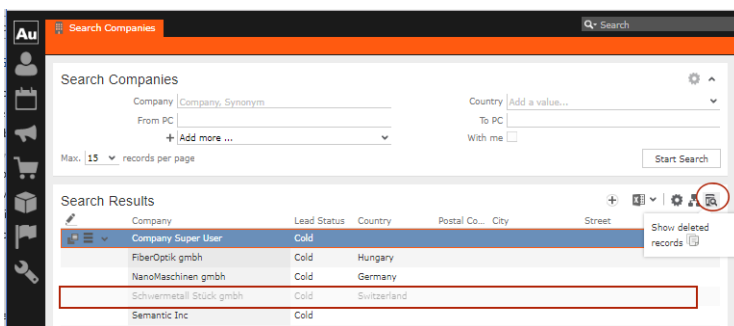
Note: If the button is not visible contact your system administrator to configure and provide access to view deleted records.

Column Settings

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

Sorting Lists

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

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

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

To sort entries in a list:

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

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.

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

Changing Column Order

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

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

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

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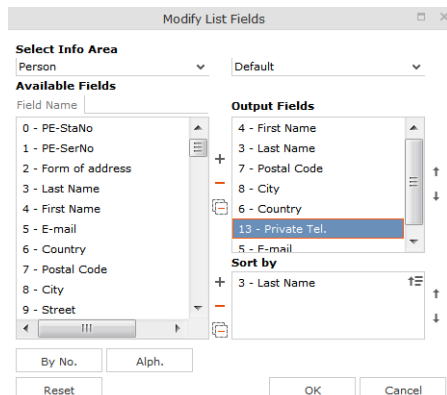
The info area that you accessed the search for is entered in the **Select Info Area** field.

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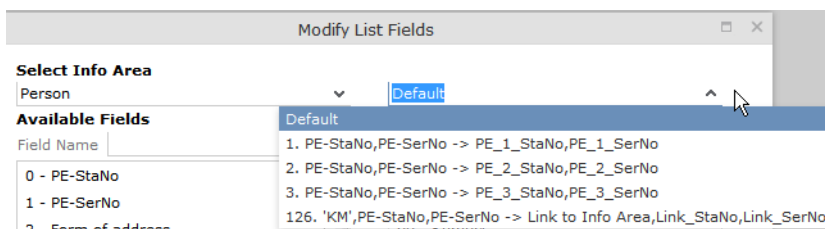
If only one link is available, only the **default** option is available.

- **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.
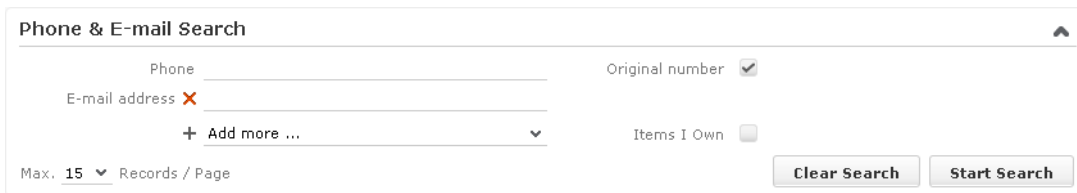
Telephone and E-mail Search

This area allows you to search for telephone numbers (e.g. for incoming calls) and e-mail addresses of companies/persons and to display and add company and/or person information as well as additional information.

To search for companies or persons using their phone number or e-mail address:

1. Select (**Accounts**) **> Phone & E-mail Search** from the menu.

   The **Phone & E-mail Search** is displayed.

Note: Only the **Phone** field is displayed by default; you need to add the e-mail field.

2. Enter the phone number or e-mail address you wish to search for.

3. Enable the **Original number** check box if you wish to automatically add the appropriate country and area codes entered in your telephone profile.

4. Click on **Start Search**.

   The records found are listed.

Note: The complete address must be entered in order to search for e-mail addresses. You can enter non-ASCII characters supported by IDN (e.g. é).

5. Edit the record as necessary. Use the context menu in the results list to access the same options as in the company and person result lists.

Telephone Number Search Method

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

Examples:

100	A short number is interpreted as an internal extension of another rep (the rep must be present as a person in the database). Your country code, area code and your company's telephone number are added to the start of the telephone number.
3334567	Longer numbers without a leading zero are interpreted as local numbers. Your country code and area code are added to the start of the telephone number.
07323334567	A number with a leading zero is interpreted as a domestic number. The leading zero is removed and replaced by your country code.
0049893334567	A number with two leading zeros or a + at the start is interpreted as an international number. The 00 or + is removed.

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

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

The search ends:

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

Adding Records

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

Adding new Records

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

Adding new Independent Records

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

In certain info areas, such as **Company** or **Person** (or **Company in Person**), Aurea CRM web matches up new data with existing records to prevent duplicate records from being added to Aurea CRM's database, >> Match-up on page 95.

Example: Adding a new company

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

1. Select > **New Company** from the menu to open the search area.
2. Click on **Search**.
3. Click on ⊕ (**New**)in company search's results list.

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

4. Enter all the relevant information.

5. Click on ✔ (**Save**). Aurea CRM web automatically checks whether the company is already stored in the database, >> Match-up on page 95.

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

Adding new Child Records

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

- From the parent record, >> Adding Child Records from the Parent Record on page 88.

- From any info area, >> Adding Child Records from Anywhere on page 90.

- In the tree view of the parent record, >> Adding Child Records in the Tree View on page 91.

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.
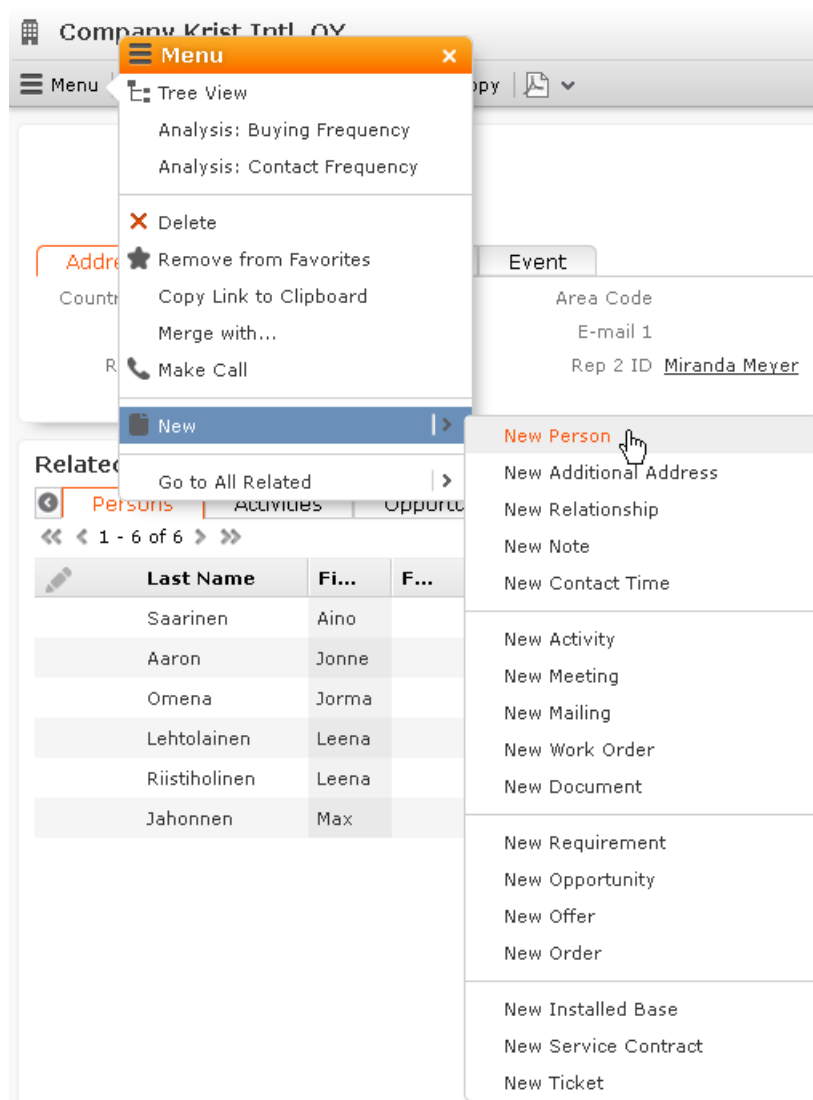
As it is clear which record is the parent record in this case, you are immediately switched to the mask where you can enter the new record's data. Proceed as with independent records, >> Adding new Independent Records on page 87.

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 Child Records from Anywhere

Child records can also be added without accessing the parent record. If you select **Accounts > New Person** or **New Activity**, for example, the system guides you through the necessary steps.

Example: Adding new Persons from any info area

You can add any number of persons to an existing company. Before you enter a new person, you must select the associated company.

To add a person:

1. Select ![icon] (**Accounts**)> **Persons** from the menu to open the search area.

2. Click on **Search**.

3. Click on ⊕ (**New**)in search's results list.

   The **Create Person** process is displayed.

4. Search for the desired company or add a new one.

5. Select the desired company in the results list to add the person to the company. The **New Person in Company** mask is displayed.

6. Enter the relevant data.

7. Click **Save** to add the new person.

8. The record is displayed in the default view.

Adding Child Records in the Tree View

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

As the parent record is uniquely identified, the input mask is displayed immediately. Proceed as with independent records, >> Adding new Independent Records on page 87.

Example: Adding a new person to a company in the tree view

To add a new person to a company:

1. Switch to the tree view.

2. Select **New** from the **Person** ( ) context menu.
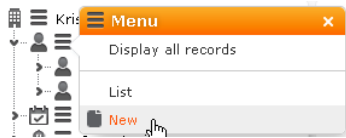
3. The **New: Person** mask is displayed.

4. Enter the person data.

5. Click on **Save**.

The record is displayed in the tree view.

Copying Search Criteria to New Records

If you search for a record that cannot be found, you may want to add a corresponding new record.

Your administrator can determine that you can automatically transfer your search criteria to the new record.

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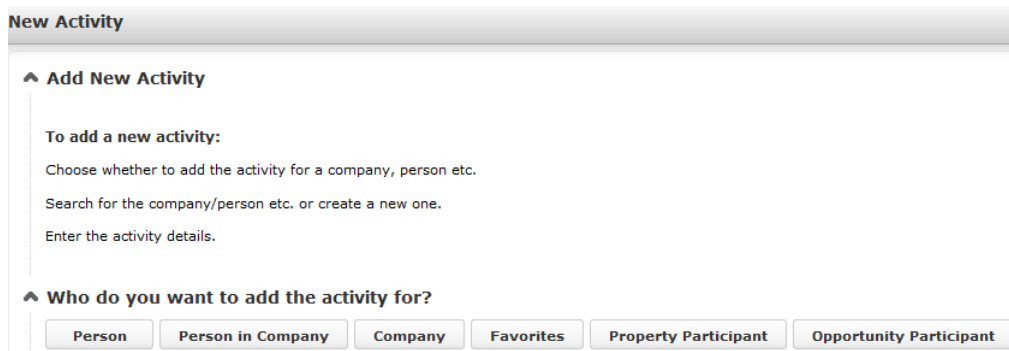
You are guided through the steps of adding new records in various info areas, in particular if new records cannot be added directly due to a lack of information. For example, an activity can only be added if a company or person has been selected.

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.
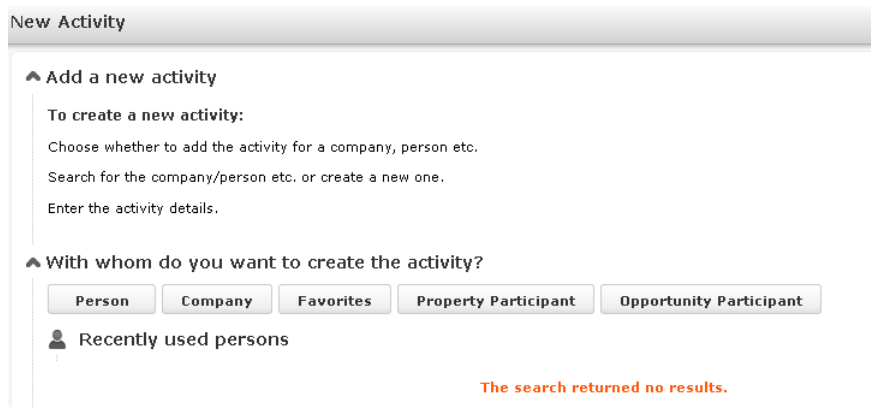
3. Choose the desired parent info area. In this example, we want to add an activity for a person. Click on **Person**.

   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**.

Copying Records

Your administrator can determine that you can copy data from a similar existing record when adding a new record. If a record can be copied, the (**Copy**) button is displayed in tab view.

To copy a record:

1. Open the record you want to copy.

2. Click on (**Copy**) in the tab view.

3. Switch to the desired record or add a new one.

4. Click (**Paste**).

   The data from the copied company is transferred to the record.

Note: Note: Only data that does not depend on a specific record can be copied. For example, the name, variant and key fields of a marketing activity are not copied. Date fields are sometimes shifted accordingly. For example, if the start date of the copied marketing activity is 1.10.2013, and the end date is 3.10.2013,

then the new marketing activity's start date is automatically set to the current date, and the end date set to 2 days later.Data in the source record that you have only been granted read access to is **not** copied from the source to the target record.

5. Make the desired changes.

6. 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, >>
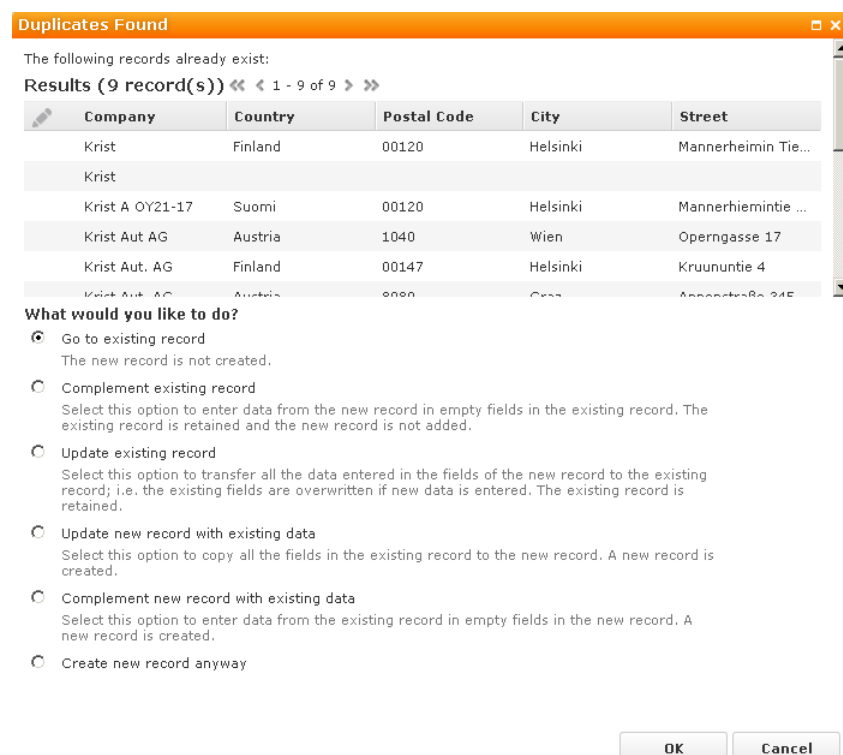
Select one of the available actions and click on **OK**.

Address Verification

Your administrator can define that addresses entered are verified using an external application.

Whenever an address is edited or entered in a company, person, additional address or property, the **Address Check** dialog is displayed. The address you entered is displayed at the top followed by a list of suggested addresses returned by the external application.

Double-click on a suggestion (or select the suggestion and click on **OK**) to apply the suggested address to the current record.

Note: If the suggested address contains a catalog value that is not present in the database, you cannot select the suggestion.
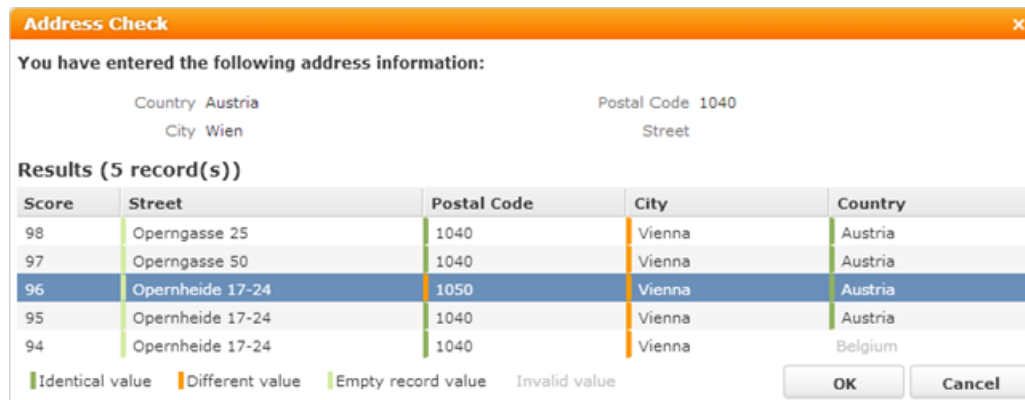
Depending on the external application, the suggestions may be rated. Suggestions in the list are sorted according to this rating in descending order (i.e. better suggestions are at the top). Differences between your entries and the suggestions are color-coded:

Green: Data that matches the value you entered

Orange: Data that differs from the value you entered

Light green: Data you did not enter but was returned by the external application

Gray: Catalog values that are not present in the Aurea CRM database (these suggestions cannot be used)

Your administrator can define that suggestions exceeding a certain rating threshold are applied automatically without displaying the list of suggestions.

Transferring Contact Details from Signatures and Websites

Information on prospective customers is often available from contact information on a website or e-mail signatures. Your administrator can determine that you can copy and paste this information when adding and/or editing company and/or person records. Aurea CRM web analyzes the data and assigns them to various fields such as **Name**, **Street**, **Postal Code** etc.

To transfer data from a signature or website to a new record:

1. Copy the contact details from the source to your clipboard.

2. Switch to the input mask, in this case a company:

3. Select the option configured by your administrator to copy signature or website information.

    The **Copy from Signature or Website** dialog is displayed:

4. Paste the data you copied to the clipboard and click on **Analyze.**

    The system assigns the contact information to the available fields. Use the drop-down lists to change the fields that data is assigned to if the automatic settings are incorrect.

5. Click on **Apply** to transfer the data to the record once the information has been assigned correctly.

Editing, Viewing and Deleting records

Records can be edited, displayed or deleted.

You can display records as follows:

• Start the search, enter search criteria and search for the record you wish to display.

• Depending on your configuration, you can open your favorites and recent records from the navigation bar, >> Favorites on page 25 and History on page 23.
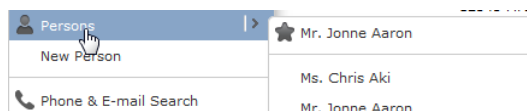
You can edit records in list and tab view. You will be asked to confirm the deletion of records, >> Editing Records in List View on page 100, Editing Records in Tab View on page 98 and Deleting Records on page 104.

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

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

Editing Records in Tab View

To edit data in tab view:

1. Select the record you want to update in the results list.

2. Double-click on the record or select **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.
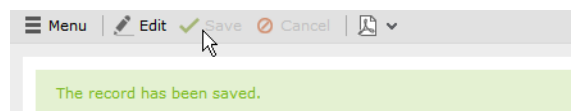
Additional messages such as system messages or information that a record has been added to your favorites are displayed in the inbox, >>

Buttons in the Tab View

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

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

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

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

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

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

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

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

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

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

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

Editing Records in List View

To edit records in list view:

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

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

   - Select catalog values from the drop-down list, >> Catalog Fields (Drop-down Lists) on page 50.

   - Select reps from the dialog box, >> Rep Fields on page 53.

- Use the small calendar to enter dates, >> Date Fields on page 52.

- Click on 🔍 (**Select**) next to a link field to select a record in another info area, >> Link Fields on page 54.

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

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

Editing Multiple Records in the List Simultaneously

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

Selecting Multiple Records

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

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

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

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

Editing Multiple Records

To edit multiple records in a list:

1. Select the desired records, >> Selecting Multiple Records on page 101.

2. Click on ☰ (**Show Menu**) next to one of the selected records.

   The context menu for editing multiple records is opened.

3. Select **Edit** from the menu.

   The fields displayed in the list view are displayed:
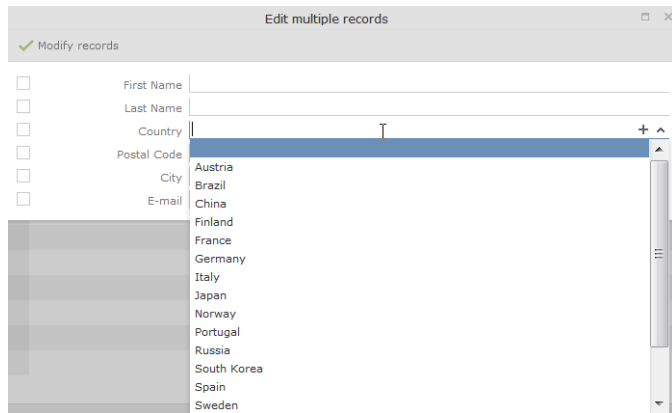
If all selected records contain the same value in a field, the value is displayed. Otherwise the field is empty.

4. Change the content of the desired fields.

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

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

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

5. Click on **Modify records.**

   The changes are applied to all selected records.

Deleting Multiple Records

To delete several records in the list at once:

1. Select the desired records, >> Selecting Multiple Records on page 101.

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

Your administrator can define processes used to add or edit data. For example, opportunities progress through a number of phases which differ by industry and the business processes in your company.

Your administrator can divide a process into individual phases and assign tasks to these phases. Some of these tasks can be mandatory, which means that the opportunity cannot proceed to the next phase until these tasks have been completed. Opportunities tend to be structured in phases such as identification, qualification, offer and conclusion.

When editing data, only one phase is currently active. The active phase is displayed in the process's header in orange.
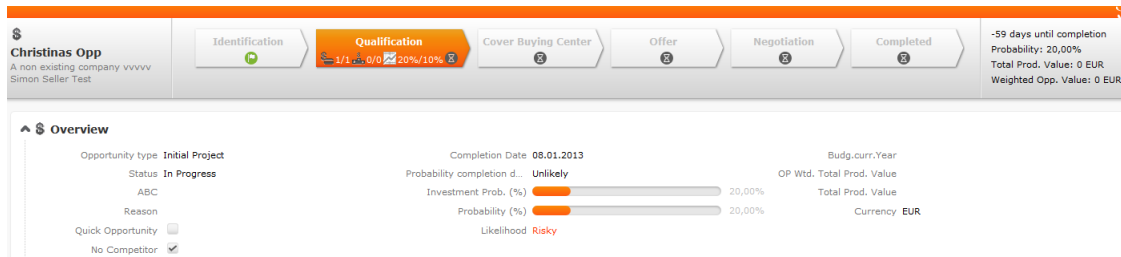
Depending on your configuration, you may be able to switch back and forth between phases, or you may only be able to proceed to the next phase once you have completed all the necessary steps.

Your administrator can define help texts and icons for each phase and for the whole process that provide you with information on the current status and what tasks need to be completed.
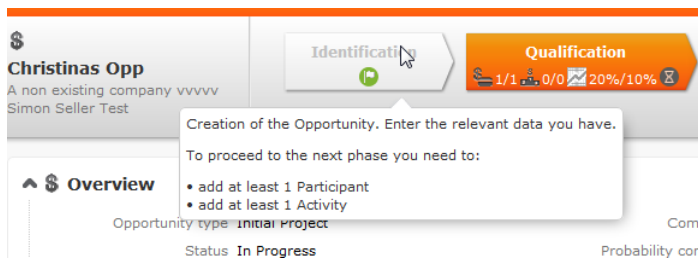
Metrics can be displayed for individual phases (in the arrows) as well as for the entire process (on the far right). These metrics provide feedback on key data relating to the process.

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

Linking Records

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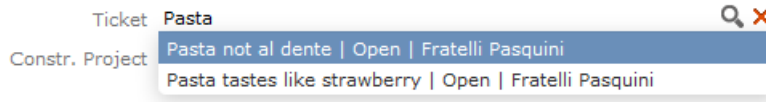
• Click on ⌕ (**Select**) to search for the desired record. Select the search context before starting the search. Your administrator can determine whether you can choose to search for the target record in the current context (i.e. a record related to the current record or its parent record) or in the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

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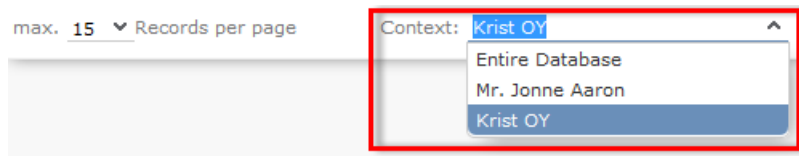
Deleting Records

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 in 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

Your administrator can define whether a history can be displayed for records. By default, the history is configured for the following info areas:

• BTB: **Installed Base**

• FS: **Product Overview**

• OTC: **Sample**

If the history function has been enabled, you can display changes made to records (provided you have the necessary access rights). The history include all changes including those made automatically by the system (e.g. as a result of importing data).

The history is displayed in the **Related Data** area for those info areas where the history has been enabled by your administrator. For performance reasons, the history is not always updated immediately after each change.

To display the history:

1. Switch to a record in an info area that includes a history (**Installed Base** in the following example).

Your administrator can determine that only the most important data, such as the modification date and time, field, previous and new value are displayed.

2. Click on **History** under **Related Data**.

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

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

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

Exporting

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

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

Examples:

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

- 〖W〗 Microsoft Word

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

- 〖PDF〗 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 will thus contain these 50 records.

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

To export data in a list:

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

   The records are exported to the file.

Export Examples

Example: HTML export of a person record in tab view:
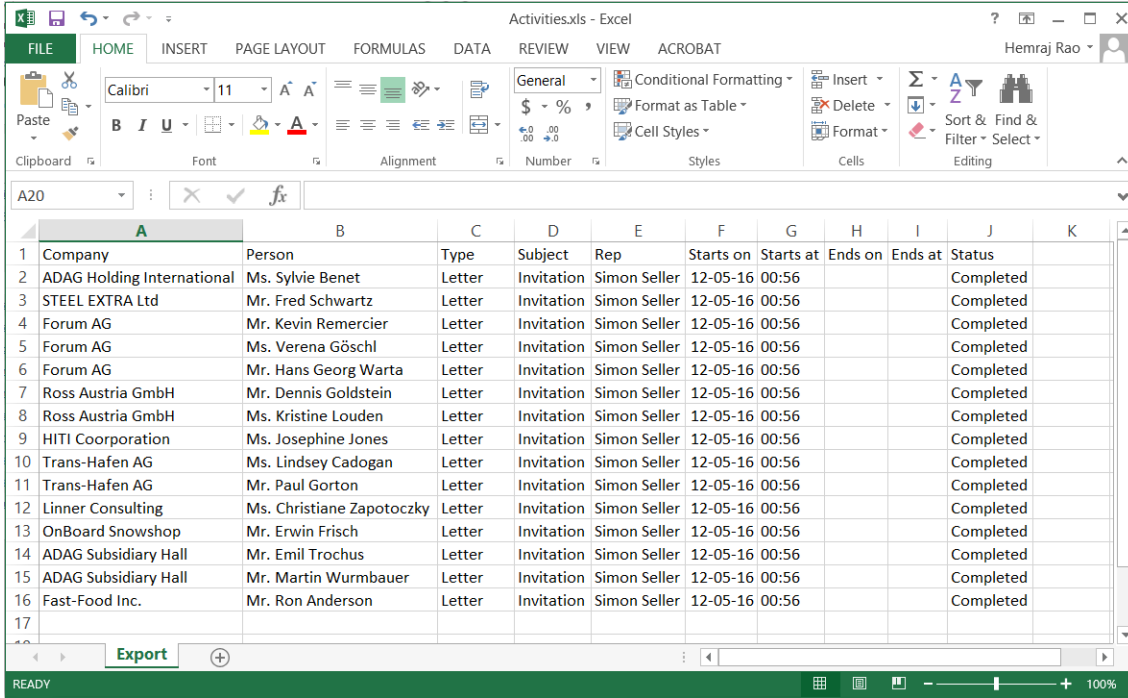
Example: PDF export from the person results list:

Reps

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

Selecting Reps

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

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

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

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

Selecting Reps from the List

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

To select a rep from the list view:

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

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

2. Click on a letter or enter the start of the rep's name and click on **Find**.
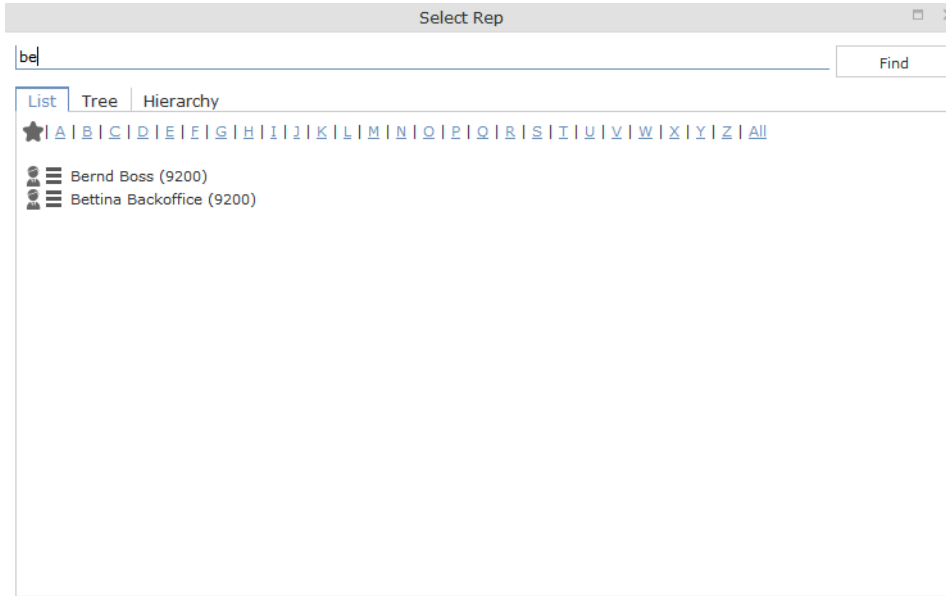
3. Double-click on an entry or choose **Select** from the rep's context menu to enter the rep in the field.

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

Selecting Reps with the "Find as you type" Function

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

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

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

- Reps whose names begin with these letters
- Reps whose name contains the text

A list containing all matches is displayed.

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

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

The selected name is entered in the rep field.

Selecting Reps from the Tree View

To select a rep from the tree view:

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

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

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

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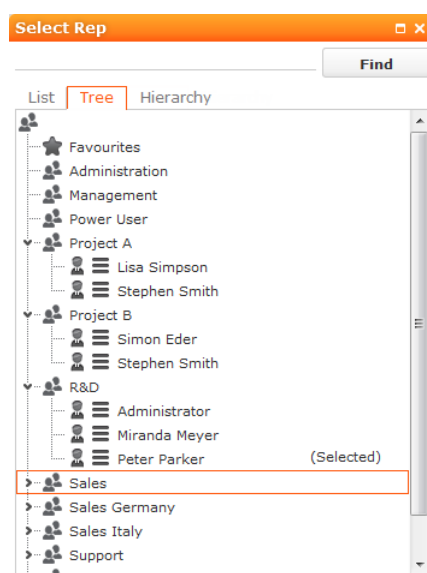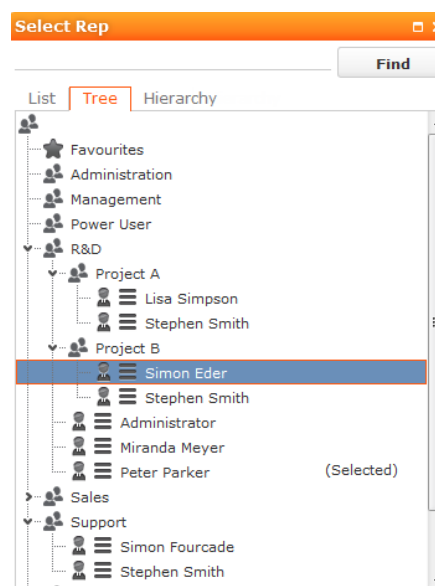
3. The reps are displayed in tree view. Each rep is accessible from the group they have been assigned to. Use the ➤ and ▾ to expand or contract the tree structure and display the reps allocated to a group.

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

Selecting Reps in the Rep Hierarchy

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

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

To select a rep in the hierarchy view:

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

   The **Select Rep** dialog is displayed.

2. Switch to the **Hierarchy** tab.
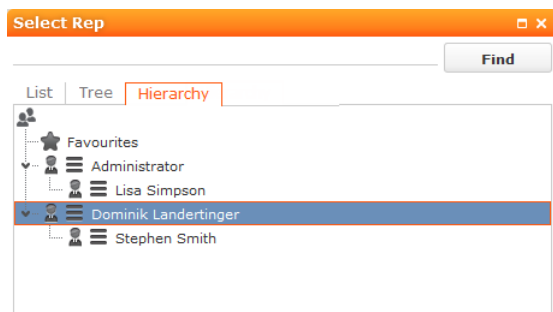
   Reps are displayed below their immediate superior in the hierarchy. Click on ›
   (**Expand**) or ˅ (**Collapse**) to expand or collapse the tree.

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

Rep Favorites

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

To add a rep to your favorites:

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

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

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

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

- Ticket: Contact partner, end customer and billing address

- Service Contract: Billing address and service contractor

- Installed Base: Location

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

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

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

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

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

- Which roles are available in which info areas

- Whether participants are automatically transferred to child info areas

- Whether you are allowed to add participants

- etc.

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

You can delete individual participants.

Adding Participants

To add a new participant:

1. Switch to the record (e.g. ticket, service contract, installed base, opportunity, offer, order) you want to add a new participant to.

2. Click on ⊕ (**New Participant**) on the **Participants** tab under related data or select **New > Participant** from the context menu.

   The **New Participant** wizard is started.

3. Choose whether to add a company, person or record in your favorites as the new participant. Once you have selected the desired record, enter the participant's role.

4. Depending on the info area you are adding the participant to, you can enter additional information concerning the participant, e.g. their position at their company.

5. Depending on the info area the new participant is displayed in the list of participants and is set to the active participant for the selected role. If another participant was previously assigned to this role, the **Inactive** field is enabled in the previously assigned participant record, setting the previous participant to inactive.

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

Changing the Status of Participants

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

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

To change a participant's role:

1. Switch to the desired record and switch to the **Participants** tab.

2. Enable the **Inactive** check box in the list view for those participants whose status you want to change, >> Editing Records in List View on page 100.

3. Disable the **Inactive** check box for the participant who should be set as the active participant in their role.

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

Default Values

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 will be 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 will no 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.

You can define which holidays are displayed in your calendar, the data displayed in the left sidebar etc. in the user configuration, >> User Configuration on page 62.

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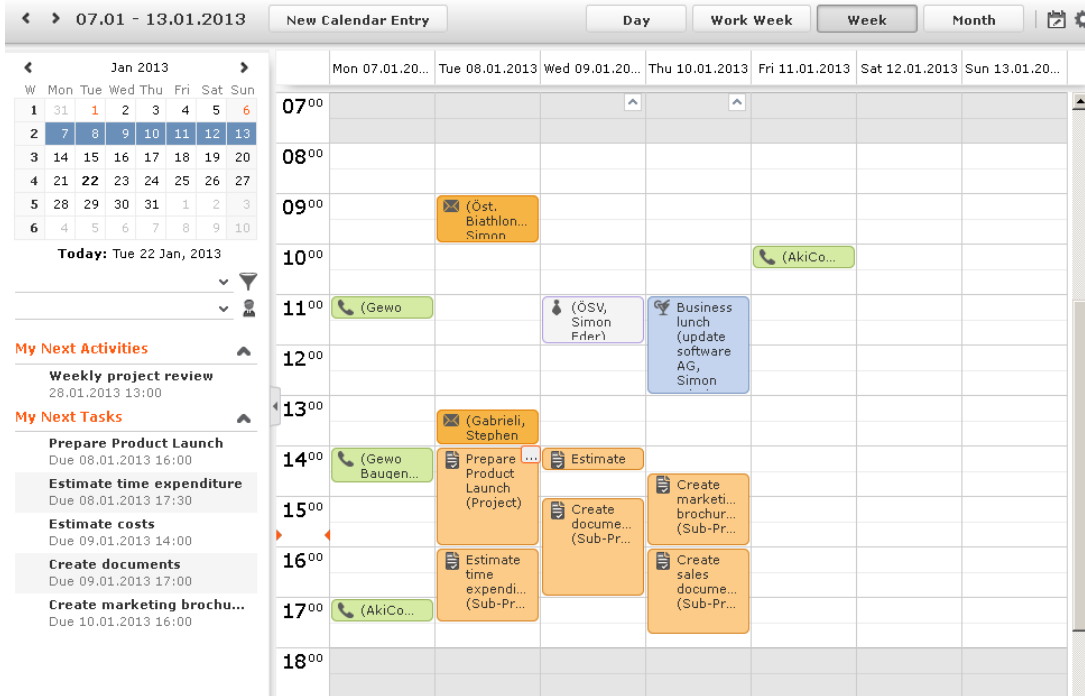
- Different types of appointment are indicated using different icons (for telephone calls, visits etc.).

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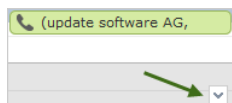
- Appointments lasting all day or spanning several days are displayed in a bar at the top of the calendar (below the date).
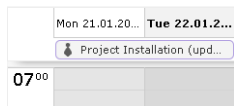
- Concurrent appointments cannot be displayed in the week view of the calendar. Click on "…" to display these appointments in a new window.
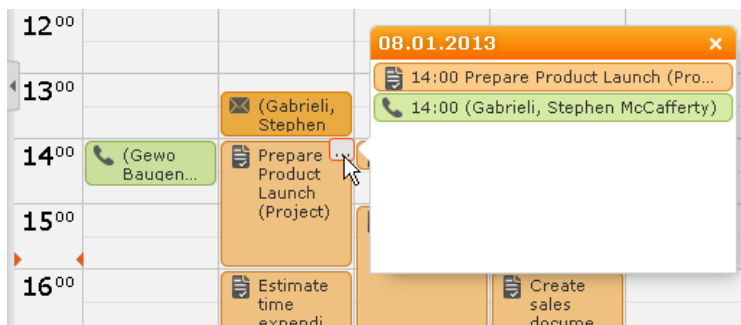
- Only a limited number of appointments can be displayed per day in the monthly view. Click on **+ x more** to display all the appointments in a separate window.

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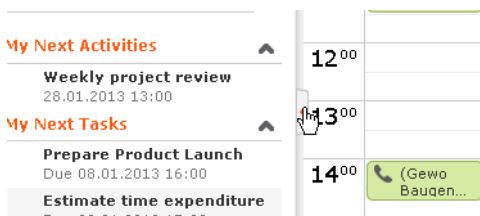
Your upcoming activities, tasks and any absences are displayed in the left sidebar by default. You can also select and define filter sets or rep groups.

- Holidays are color-coded.

Navigating in the Calendar

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 119.

Daily and Weekly Planning

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

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

Resources

The resource view allows you to view the workload of reps. This makes planning activities (especially internal meetings) much easier. Reps' absences (holidays and sick leave) are also displayed here.

To open the resource view:

1. Select ▮ (**Collaboration**) **> Resources**.
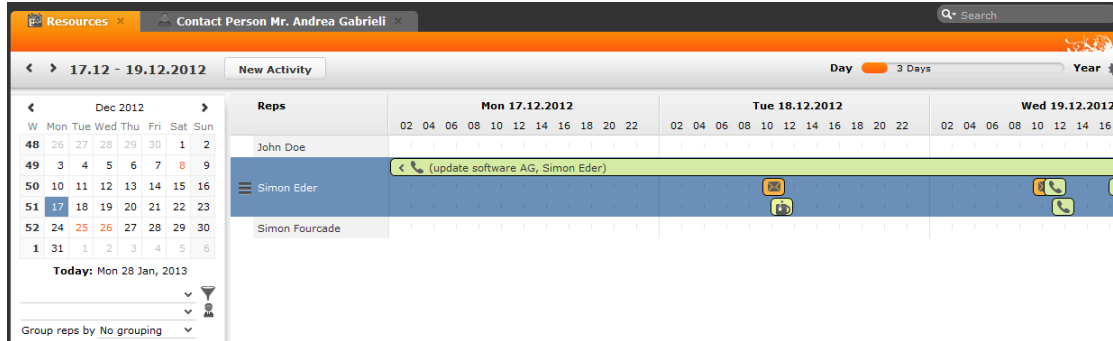
The current date and time is indicated by a vertical line. Holidays are color-coded.

If a rep's working hours have been defined, this time is color-coded.

You can customize the resource view, >> Customizing the Resource View on page 120.

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

Customizing the Resource View

You can customize the resource view as follows:

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

• To configure the time period that is displayed:

  • Click on the desired day or start of the time period in the small calendar in the sidebar.

  • Select the time period that is displayed using the slider in the header:

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

  • Use the arrows in the header to switch between time periods.

- Select general or rep filters from the drop-down lists in the sidebars to determine which reps/appointments are displayed. You can define your own filters.

- You can select additional criteria used to group reps from the **Group reps by** drop-down list: **Department** (**Org. Group ID** field in the rep record), **Country**, **Skill** or **No grouping**.

- Click in the **Reps** column in the header to sort the reps displayed in the resource view within their group.

- Click on ⚙ (**Edit Settings**):

  - Select the **Color Coding** criteria used to color activities.

  - Enable the **Show working hours only** option to restrict the display to the time period defined as working hours by your administrator.

  - Enable the **Show group column** option to display reps' groups in a separate column.

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

Timeline

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

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

By default, 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, >> Searching on page 69.

2. Select **Timeline** or **Marketing Timeline** from the context menu.

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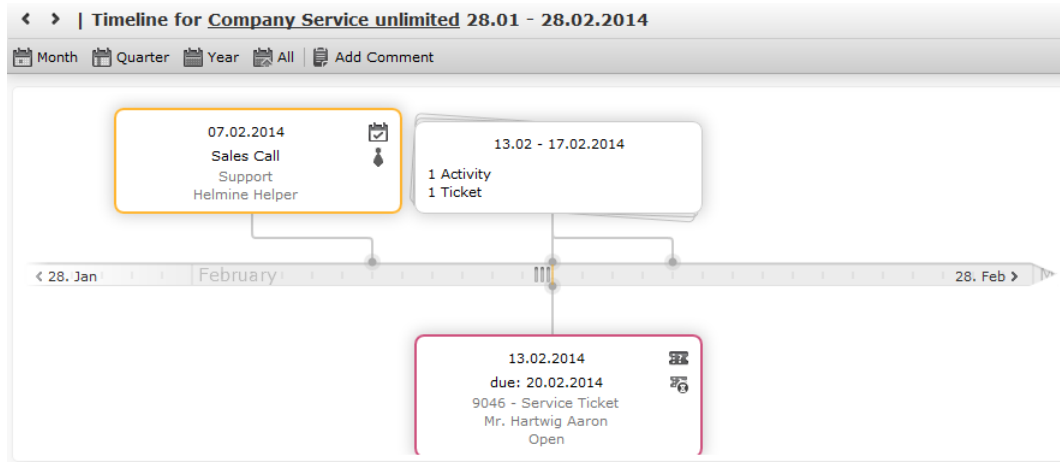
3. Click on 🔍 to select the time period that is displayed in the timeline: **Month**, **Quarter**, **Year** or **All**.

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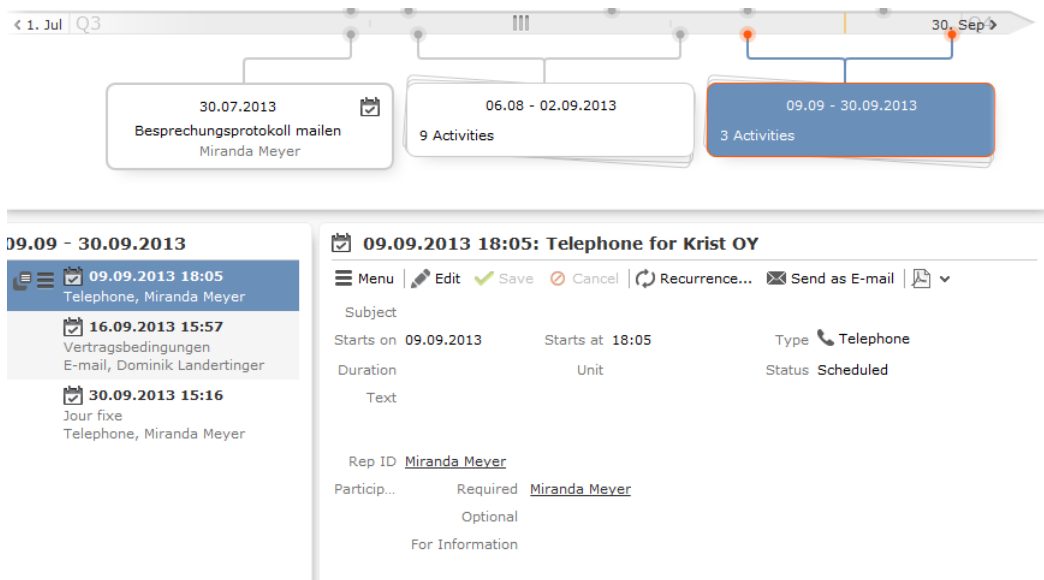
If a bubble contains multiple records, a list of all records in the bubble is displayed on the left beneath the timeline. The currently selected record's details are displayed on the right.

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

Adding Insights

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

To add an insight:

1. Open the timeline.

2. Click on 📑 (**Add Insight**) and enter the text.

3. Save.

Queries

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

CRM does not perform linking on the database server for 1-N links. The workaround, in this case, is to modify the query statement. For more details, see 1-N links handled on data access layer on page 148

Rights

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

Query Structure

A query can consist of the following elements:

• A main info area

• Conditions applied to the main info area's fields (e.g. **Country** = Austria and **Lead Status** = Customer)

• Several related info areas, each of which is linked to the main info area or other related tables

• Various options for linking info areas (e.g. show companies with / without persons)

• Conditions applied to the fields in these info areas

Aurea Query Language (AQL)

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

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

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

1. `F1 = 1 AND F1 = 2 AND F1 = 3` was interpreted before as `F1 = 1 OR F1 =2 OR F1 = 3 □ F1 IN(1,2,3)`.

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

The input field for AQL statements is located at the top of the query window:
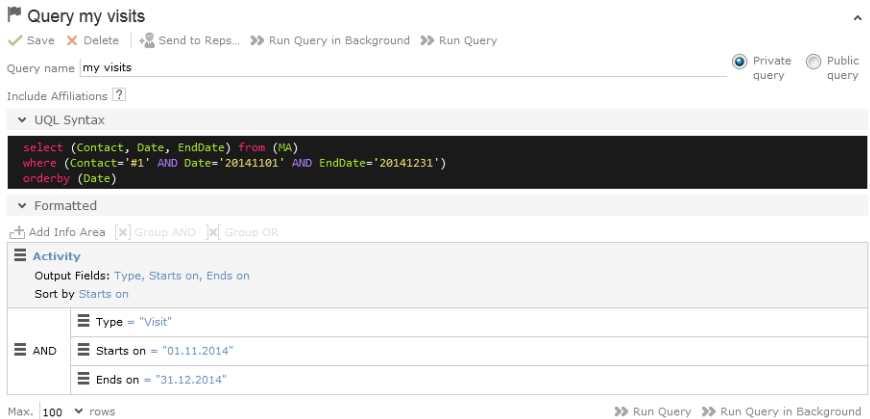
The lower area allows you to define conditions using the Aurea CRM web GUI. When defining conditions using the UI, The corresponding AQL statement is displayed in the **AQL Syntax** area. This helps you familiarize yourself with AQL.

Defining a New Query

You can define queries in two ways:

- Using AQL (Aurea Query Langauge), 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.
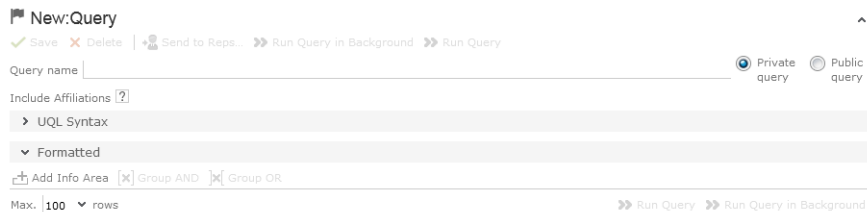
2. Enter a name for the query in the **Query name** field. Define the query as either a **Private query** or a **Public query**. Private queries can only be accessed by the rep that created the query.

> **Note:** You can however provide other users with private queries, >> Sending a Query Definition to another Rep on page 147.

3. Enable the **Include Affiliations** option (if available) to return records added for affiliates in the results. For more information, >> 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.
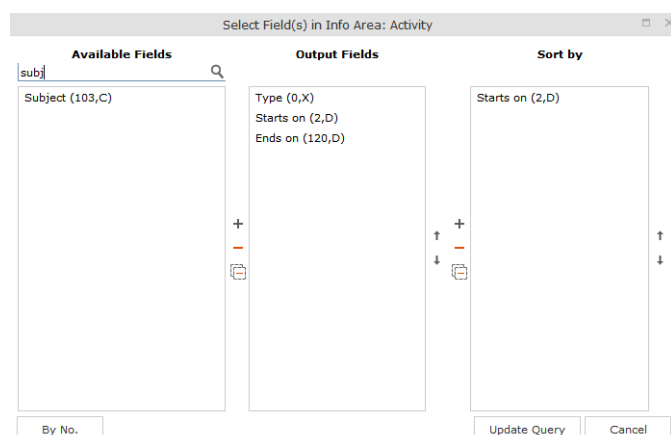
6. Select the fields from this info area that you want to display.

- **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, >> Field Data Types on page 56.

- Use the **By No.** and **Alph.** button to sort the field names alphabetically or by field number. Select the desired fields by clicking on them and click on the **+** button to transfer the field to the list of **Output Fields**.

- **Output Fields:** This area lists the fields that are displayed in the list of results. Each field is displayed in a separate column.

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

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

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

Note: You can select multiple fields by pressing the Ctrl key, >> Selecting Multiple Records on page 101.

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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, >> Conditions on page 134.
9. Save the query.

Note: Enabling **Use for Mail Merge** field allows the query to be available in Office Add-in, to be used for Mail Merge.

Editing Queries

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

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

Loading Queries

To load an existing query:

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

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

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

2. Enter search criteria to restrict the queries displayed.

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

   The query is loaded.

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

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

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

   The results are listed at the bottom of the page. The number of results displayed per page depends on your settings, >> Handling Tab on page 63. The default value is 50 hits per page. If more results are returned than are displayed per page, use the navigation arrows to switch between pages.

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

8. Click ▣ (**Export (MS Excel)**) to export your query to an Excel file, >> Exporting on page 106.

Executing Queries

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

Note: As queries can be complex, executing them can impact on the system's performance. Your administrator can therefore defined that queries are always executed in the background at a specific time (e.g. at night), >> Background Queries on page 148.

To execute a query:

1. Load the desired query, >> Loading Queries on page 127.

2. You can execute the query in two ways:

* Click ▶▶ (**Run Query**). The query is executed immediately and you can only continue working once it has finished executing.

* Click on ▶▶ (**Run Query in Background**). You can continue working with the application and the query is scheduled for execution in the background. You will receive a message when the query has executed, >> Background Queries on page 148.

  If the query is executed immediately, the results are listed at the bottom of the page. The number of results displayed per page depends on your settings, >> Handling Tab on page 63. 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

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

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

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

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

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

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

To add a child info area:

1. Load a query, >>

2. Select **Add Info Area** from the context menu of the parent info area.

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

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

   Note: Only those info areas you have access to are listed. Your administrator is responsible for defining which info areas you can access.
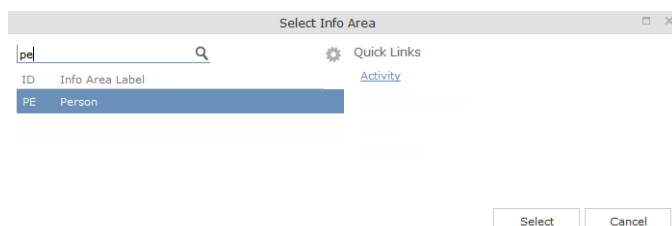
3. Select the info area from the list.

   The **Relationship Type** dialog box opens.
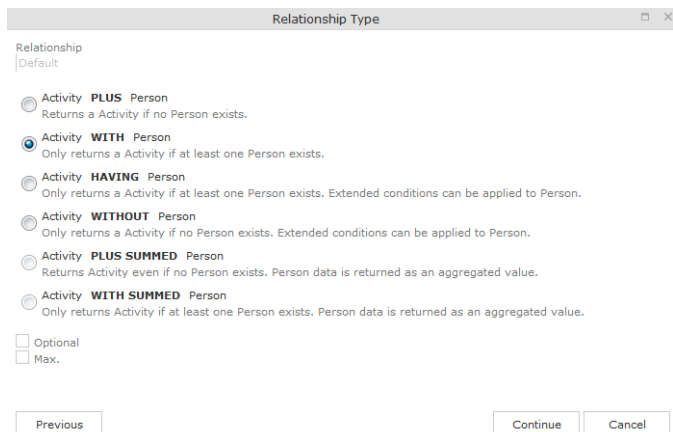
4. Select the desired relationship type. The following relation types are available for activities and persons:

- **Activity PLUS Person** returns the activity, even if no person is linked to the activity

- **Activity WITH Person** returns the activity, if at least one person is linked to the activity

- **Activity HAVING Person** returns the activity if at least one person is linked to the activity. You can define extended conditions. This option needs to be configured by your administrator.

- **Activity WITHOUT Person** returns the activity, only if no person is linked to the activity

- **Activity PLUS SUMMED Person** returns the activity, even if no summed person(s) is/are linked to the activity

- **Activity WITH SUMMED Person** returns the activity, if at least one summed person is linked to the activity

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

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

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

do not select any fields, a list of all companies to which persons are assigned will be shown, but not the information about the persons.

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

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

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

7. Click **Continue**.

   The **Select Fields** dialog box opens.
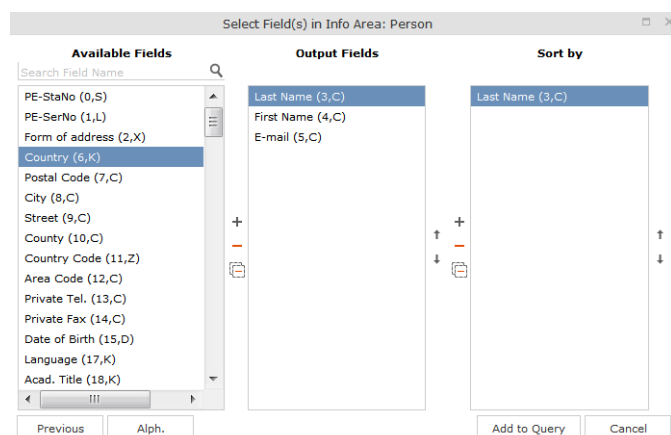
8. Define the output and sort fields, >> Selecting the Fields in the List on page 83.

9. Click **Add to Query**.

   You are returned to the query overview.

10. Define your conditions, >> Conditions on page 134.

11. From here, you can execute the query using the **Run** button, >> Executing Queries on page 129.
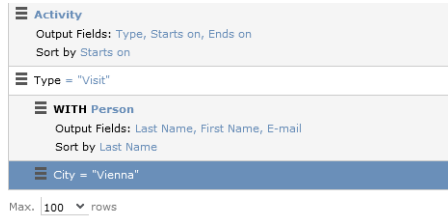
Selecting Links between Info Areas

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

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

Example:

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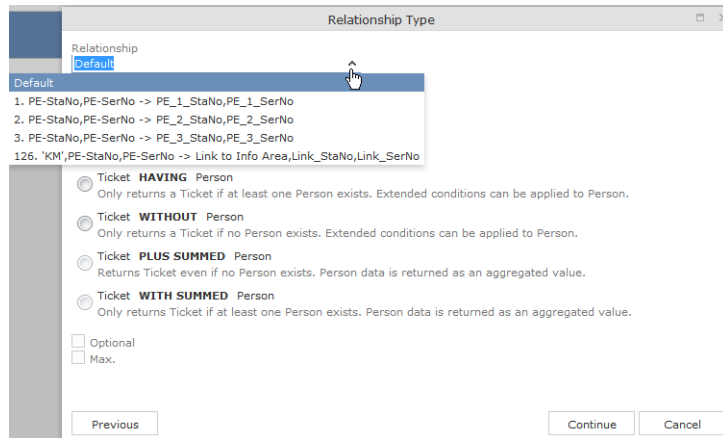
The area surrounded by the frame in the screenshot above lists the relationships between the **Ticket** and **Person** info areas.

The link type is displayed in the query as follows:

Conditions

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

Alternatively, you add determine that the comparison need be specified by the user when executing the query. This allows you to define queries where users only need to specify the comparison values, >> Parameters and Predefined Queries on page 146.

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

Defining Conditions

To add a new condition to a query:

1. Load a query, >> Loading Queries on page 127.

2. Click on ☰ to the left of **Conditions** and select **Add Condition** from the menu.

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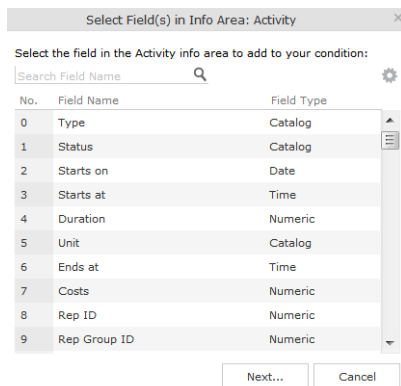
The fields that you can access based on your Aurea CRM access rights are displayed. Your administrator is responsible for defining your access rights.

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

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

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

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

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

- Text field; >> Conditions for Numeric, Alphanumeric and Time Fields on page 139.
- Date field; >> Conditions for Date Fields on page 138 and Variable Conditions on page 140.
- Catalog field; >> Conditions for Catalogs on page 135 and Conditions for Child Catalogs on page 137.
- Numeric field; >> Conditions for Numeric, Alphanumeric and Time Fields on page 139
- Logical (Boolean) field; >> Conditions for Boolean Fields on page 138.
- Time field; >> Conditions for Numeric, Alphanumeric and Time Fields on page 139.
- Rep field; >> Conditions for Rep Fields on page 139 and Variable Conditions on page 140.

6. Click on **OK**.

   This condition displayed in the overview.

Conditions for Catalogs

To define a condition for a catalog:

1. Select a catalog field.

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

The available catalog values are listed to the left. **Use as Parameter** is at the top of the list. You can use this value if the comparison value should be entered whenever the query is run, >> Parameters and Predefined Queries on page 146.

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

3. Select **Fixed** to compare the contents of the field with a fixed value from the list of entries. Select **Field** to compare the contents of a field, >> Comparing Field Contents on page 141. The **Text** option is also available for variable catalogs, >> Conditions for Variable Catalogs on page 136.

4. Double-click on an entry under **Available fields** to use it as a comparison value.

   The entry is moved to the right under **Selected Fields**.

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

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

Conditions for Variable Catalogs

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

1. Select a variable catalog field.

   The dialog used to define the condition is displayed.

2. Click on **Text**.

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

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

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

Conditions for Child Catalogs

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

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

Conditions applied to child catalogs are otherwise defined the same as for all other catalogs, >> Conditions for Catalogs on page 135.

Conditions for Boolean Fields

To define a condition for a Boolean field:

1. Select a Boolean field.
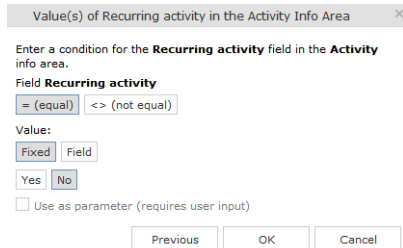
2. Specify the type of comparison (**equal**, **not equal**).

3. Select **Fixed** to compare the contents of the field with a fixed value from the list of entries. Select **Field** to compare the contents of a field, >> Comparing Field Contents on page 141.

4. Select either **Yes**, (true) **No** (false) or **Use as parameter** as the comparison value, >> Parameters and Predefined Queries on page 146.

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

Conditions for Date Fields

To define a condition applied to a date field:

1. Select a date field.
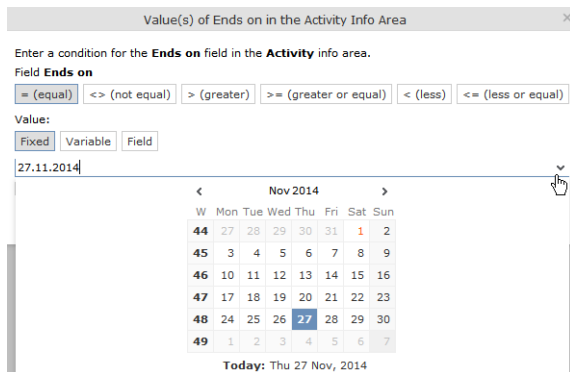
2. Select the type of comparison (**equal**, **not equal** etc.).

3. Date fields allow you to use fixed and variable comparison values. Use the **Fixed** option to compare the value with a specific date or to a value entered by the user (if the **Use as Parameter** option is enabled). Use the **Variable** option to enter a

date relative to the date the query is executed on. Select **Field** to compare the value with the contents of another field, >> Variable Conditions on page 140, Comparing Field Contents on page 141 and Parameters and Predefined Queries on page 146.

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

Conditions for Numeric, Alphanumeric and Time Fields

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

1. Select either a numeric, text or time field.
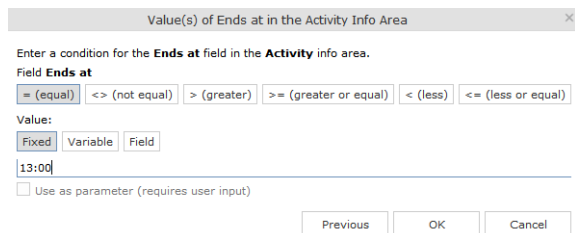
2. Define the type of comparison (**equal**, **greater** etc.).

3. Determine what to compare the contents of the field with. Choose between **Fixed**, **Variable, Field** (compare with the contents of another field), >> Variable Conditions on page 140 and Comparing Field Contents on page 141. If you select **Fixed**, you can enable **Use as parameter (requires user input)** to allow users to enter the comparison value when executing the query, >> Parameters and Predefined Queries on page 146.

4. Enter the comparison value in the **Value** field.

5. Enable the **Use as Parameter** option if you want the comparison value to be entered by the user upon starting the query, >> Parameters and Predefined Queries on page 146.

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

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

---

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

Conditions for Rep Fields

To apply a condition to a rep field:

1. Select a rep field.

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

3. You can define both **Fixed** and **Variable** conditions for reps. Use the **Field** option to compare the rep to an entry in another rep field, >> Comparing Field Contents on page 141. Enable the **Use as Parameter** option if you want a comparison value to be entered by the user upon starting the query, >> Parameters and Predefined Queries on page 146.

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

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

   Select the rep(s), >> Selecting Reps on page 109.

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

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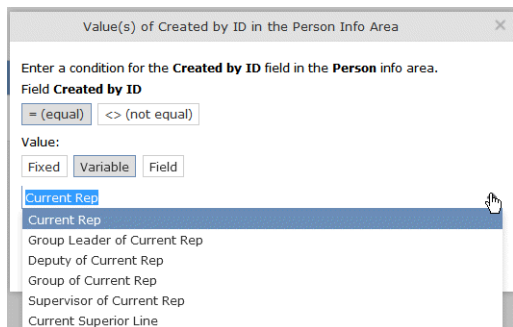
2. Select an option from the drop-down list.

   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.
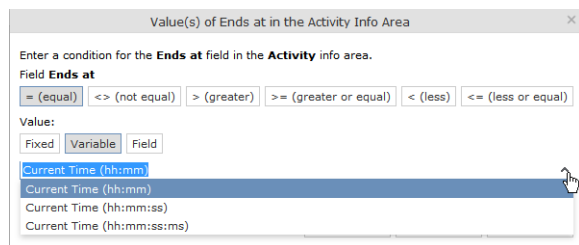
Comparing Field Contents

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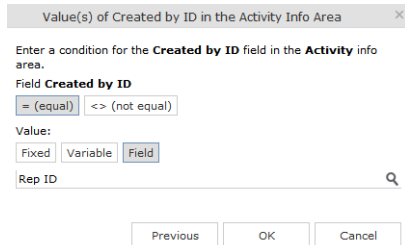
3. Click on 🔍 (**Select**). All fields of the same type in the info area are listed.

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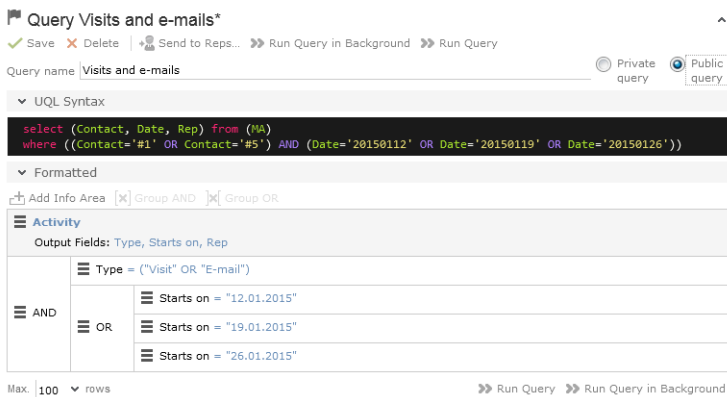
Click on ☰ to edit the info area and conditions using the appropriate context menu entries, or click on the linked field name.

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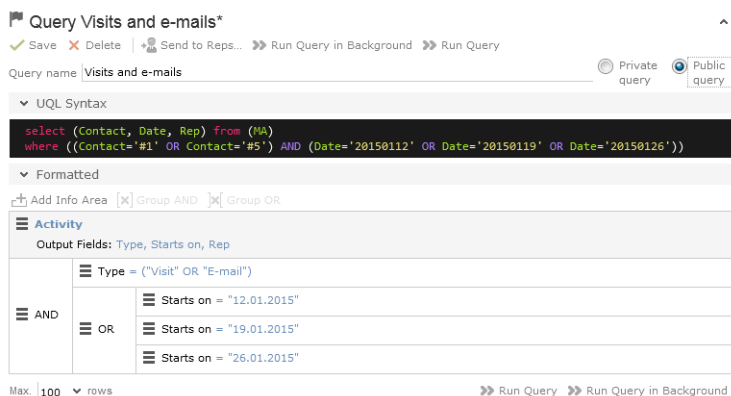
Each condition is evaluated separately and then combined when the other linked conditions using the appropriate operator (AND/OR).

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"
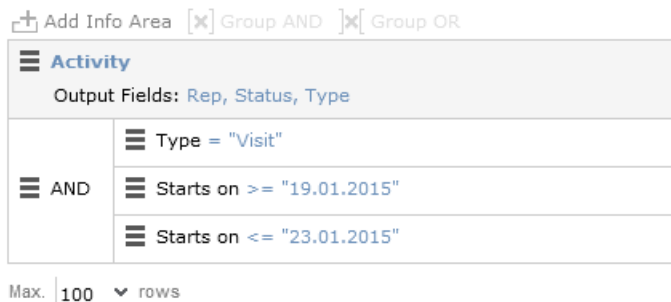
Advanced Conditions

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, >> Defining a New Query on page 125 and Adding Info Areas on page 130.

   In this example, the **Person** info area is linked to the **Activity** info area using a HAVING relationship.
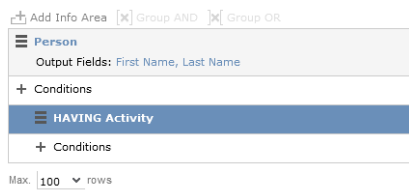
2. Select **Add Advanced Condition** from the context menu.

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

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

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

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

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

4. Click on **OK**.

The query overview is displayed.

Parameters and Predefined Queries

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

To allow users to enter parameters when executing a query, select **Use as parameter (requires user input)** as the comparison value when defining the query, >> Defining Conditions on page 134.

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

1. Open a query, >> Loading Queries on page 127.
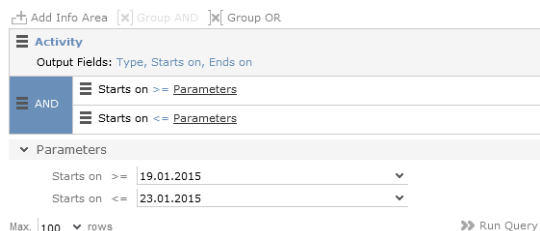
2. The conditions defined using parameters are listed under **Parameters**. Enter the desired comparison values for the parameters, or select the value from the drop-down list. One field is available for each condition defined using a parameter.

3. Click on **Run Query** to execute the query using the values you have specified.

Tips:

- If a catalog is defined as a parameter, only one catalog value can be selected. If you want to be able to select several catalog values, you need to define separate parameters. Any parameters not required must be deleted before executing the query.

- If a child catalog is defined as a parameter, your administrator needs to ensure that the parent catalog is either predefined or available for selection too. Otherwise you cannot define a parent catalog for the query.

Sending a Query Definition to another Rep

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

To make a query available to another rep:

1. Load a query (>> Loading Queries on page 127) or select a query in the list of queries.

2. Click ⁺👥 (**Send to Reps**).

A dialog box is displayed.

3. Click on 👤 (**Select Rep**) to select the desired reps or groups in the **Recipient(s)** field, >> Rep Fields on page 53.

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

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

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

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

7. Click **Send Query**.

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

Saving, Loading and Exporting Query Results

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

- Click on ✔ (**Save as Query Snapshot**) to save the results list as a query snapshot.

- Select **Queries & Analyses > Query Snapshots** from the menu to list the available snapshots.

- Click 🖾 (**Export (MS Excel)**) to export the results of the query.

Background Queries

Queries may take some time to execute, depending on the volume of data that needs to be searched. In order to be able to continue working with Aurea CRM web while the query executes, you can execute queries in the background. Note that executing complex queries may impact negatively on the performance of the server.

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

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

To display To-Dos for background queries:

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

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

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

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 text below explains in details the issue as the workaround available to solve it.

Problem description

When the user writes a UQL like this:

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

CRM splits it, and process two SQL statements. Their results are then, combined 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 an unexpected outcome in some cases.

Workaround

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 on page 123.

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

1. Composing a query

2. Enhancing the query

3. Query Execution

4. Finalizing the Query

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

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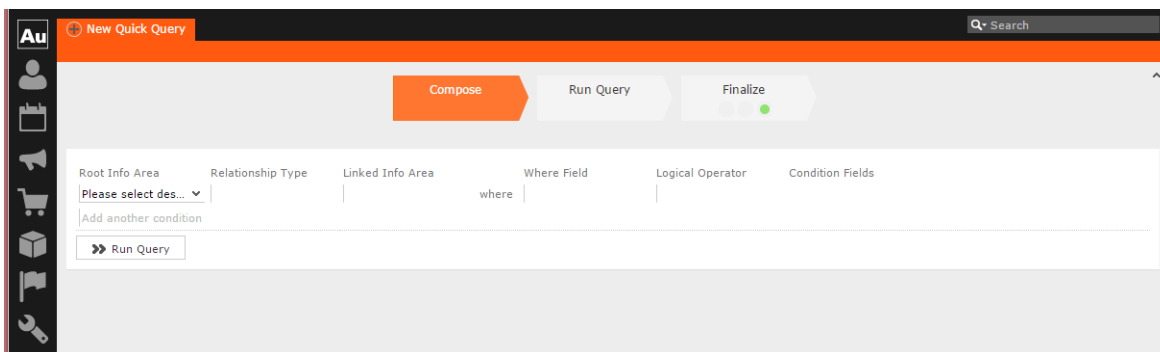
Note: The **Compose** tab allows you to implement the Compose and Enhance stages of a quick query definition.

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

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

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

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

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

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

Creating a Quick Query

To create a quick query, perform the following steps:

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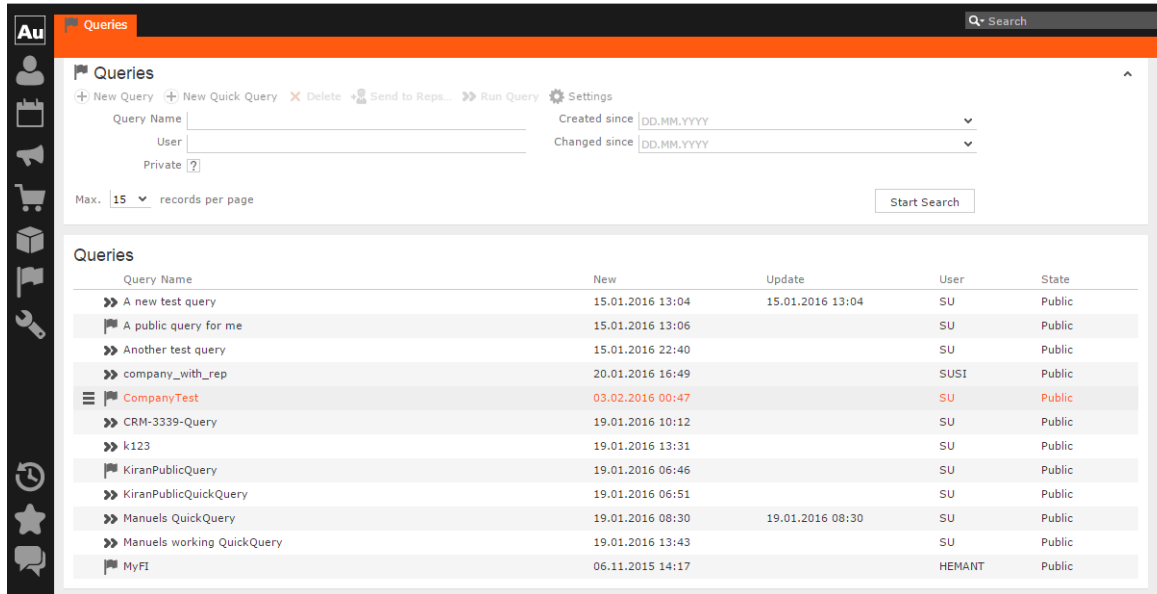
Note: The list of queries displayed contains both Quick Queries and standard queries. The Quick Queries in the Queries list are tagged with the ≫ icon.

---

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

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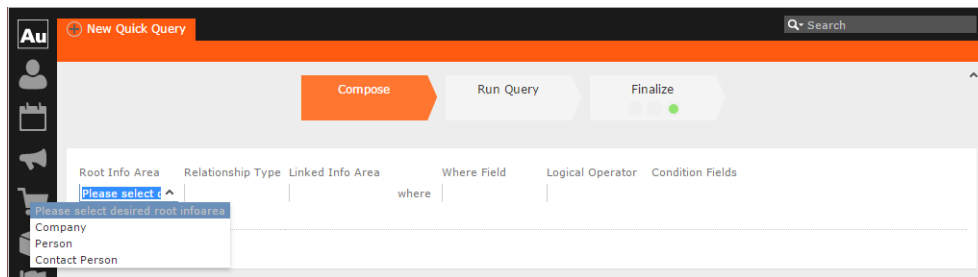
4. Select the **Relationship Type** from the drop down list for the linked info area.

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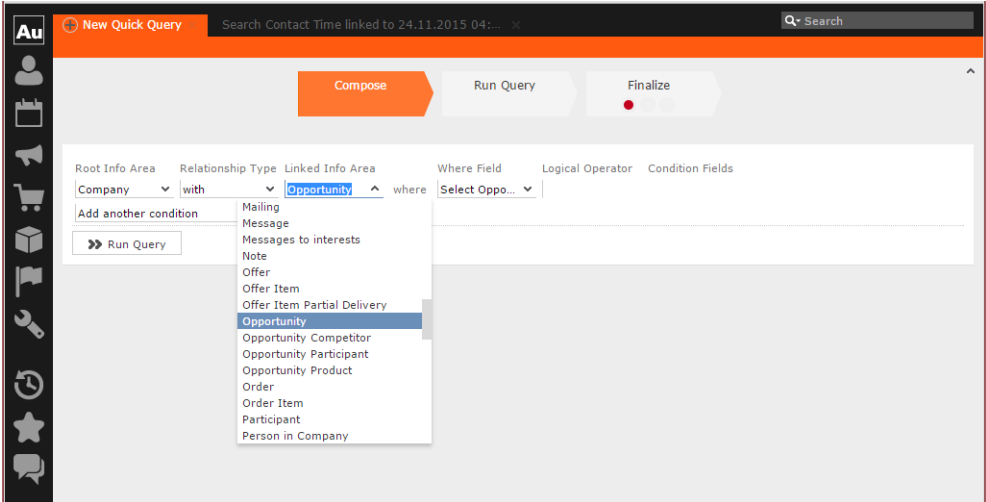
Note: It is not necessary to add a Relationship Type to another info area. You can directly create conditions on the root info area. In such case, you can directly select a **Where Field** and ignore the **Relationship Field** and **Linked Info Area** fields.

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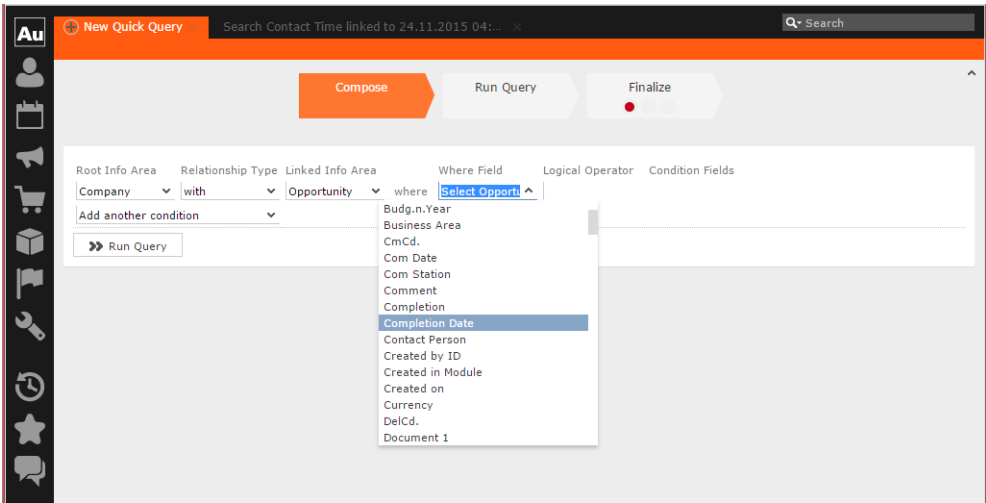
Note: The Where Field column gets activated and shows the fields from the linked info area, in this case the Company fields.

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

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

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

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

   The Condition Fields column activates and the drop down list is populated with the available values. In this case it displays the available country names. In this example screenshot, the **Logical Operator** Is between is selected and in the **Condition Fields** the start and end dates between which the completion dates for opportunities are set is selected.
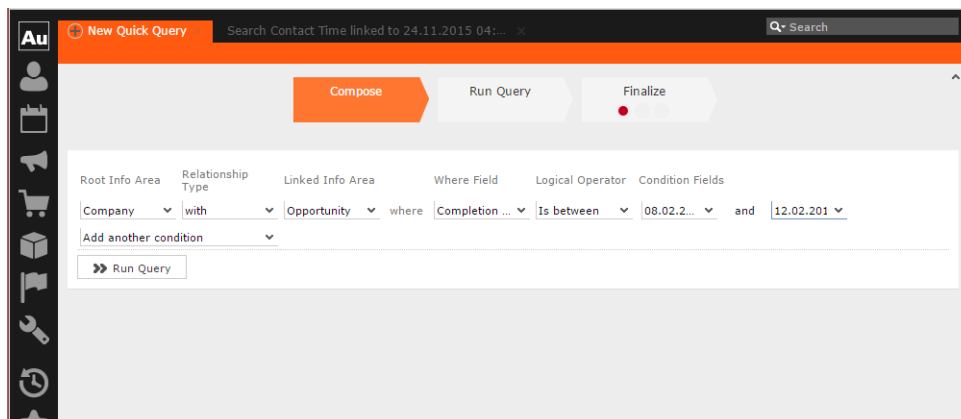
8. To Add Another Condition, select one of the following from the drop down list:
   - Add records that meet the following conditions
   - Add records from the following query
   - Subtract records that meet the following conditions
   - Subtract records from the following query
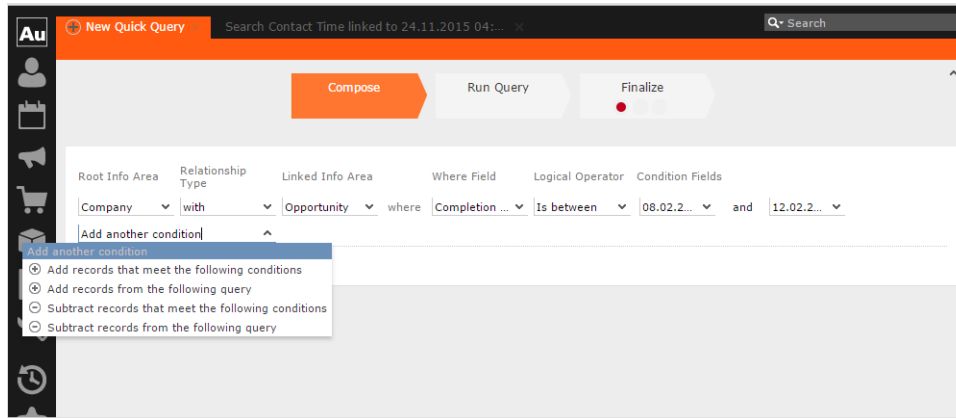
9. Click Run Query to test the results.
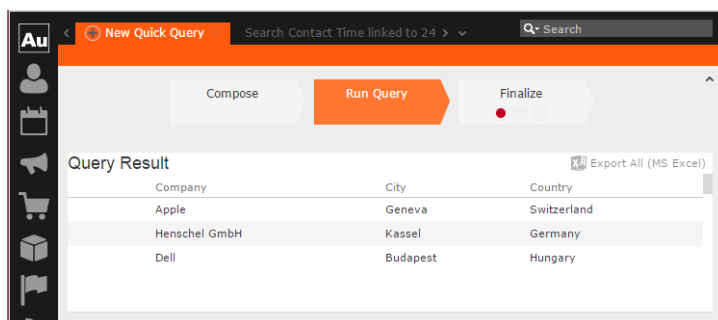
10. Depending on your choice, perform the following sub-steps.

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

---

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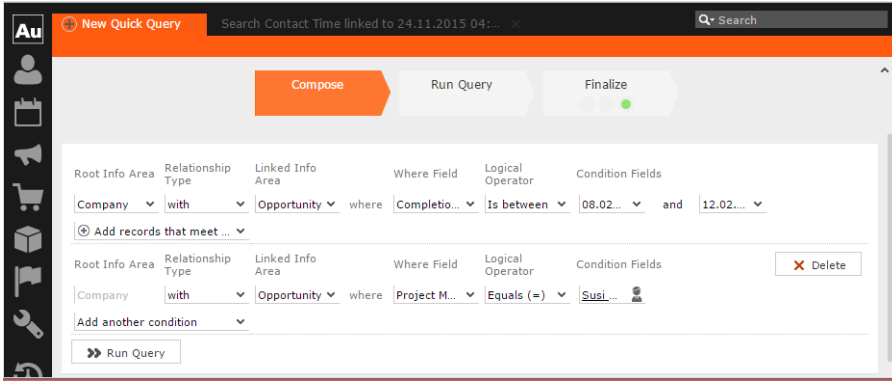
> **Note:** The above screenshot shows the **Finalize** tab with a green dot. This demonstrates that you can move between different stages of a Quick Query independently. In this case, the Quick Query was finalized after adding the above records. Now we can move to the Enhance stage of a Quick Query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

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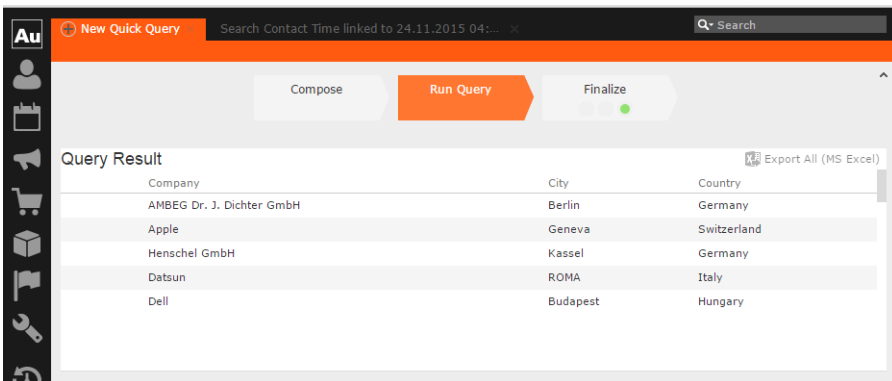
> **Note:** In this run additional records are added to the run on the base query run in step 9 above.

c. To **Add a record from the following query** or S**ubtract 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.
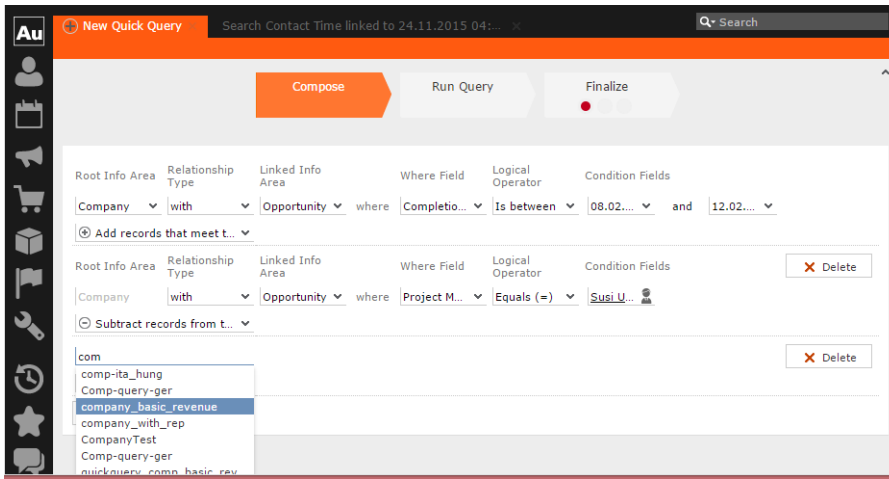
b. Click **Run Query** to view the results of the new enhancement.
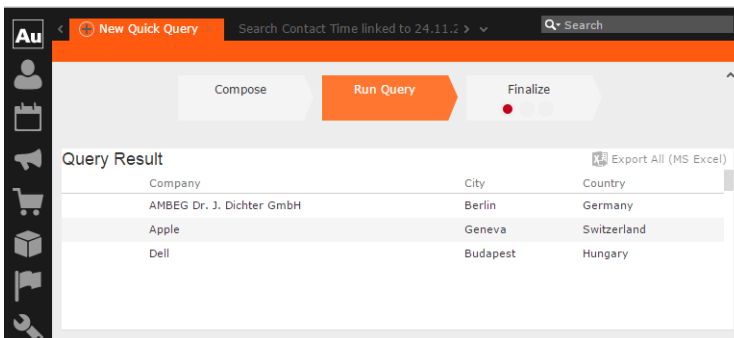
c. To **Add a record from the following query** type the name of the query in the search box.

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

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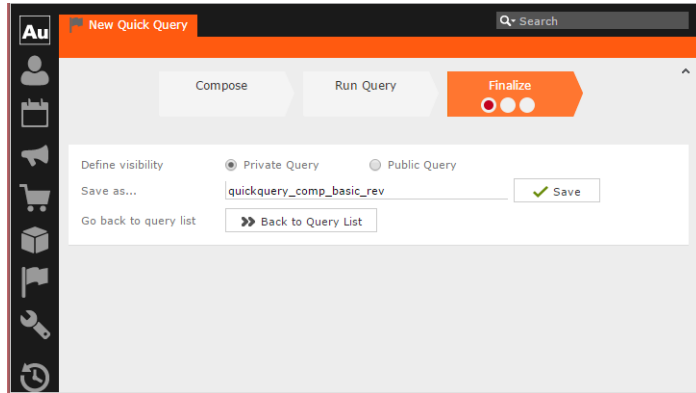
a. Check **Private Key** to save the Quick query for your personal use or check **Public Query** to share the Quick Query with others.

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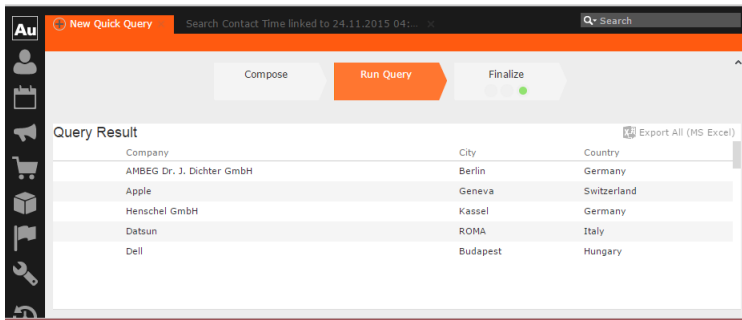
To enable change notifications service on an infoarea, request your CRM system administrator to add the watchlist menu to the infoarea's context menu.

Note: Change Notification Service is an enterprise feature.

Overview of Watchlists and Notifications
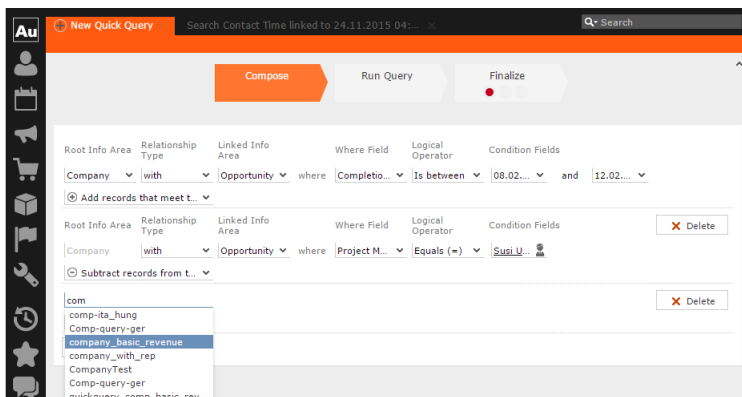
Aurea CRM users can set up their personal Watchlist of items to be notified about changes. For example, an accounts manager might be interested in knowing when a change occurs with his key accounts and he can add the accounts to his watchlist and set the notification types.

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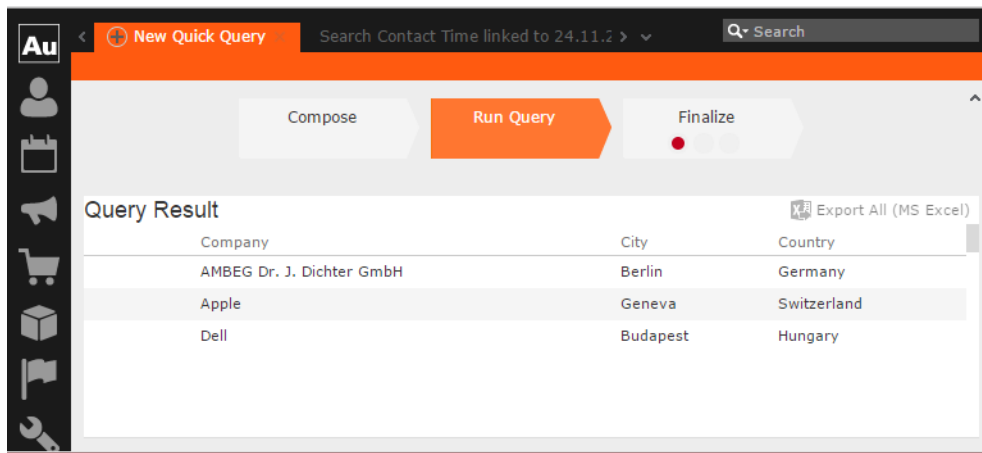
A notification is generated when one of the following condition is fulfilled:

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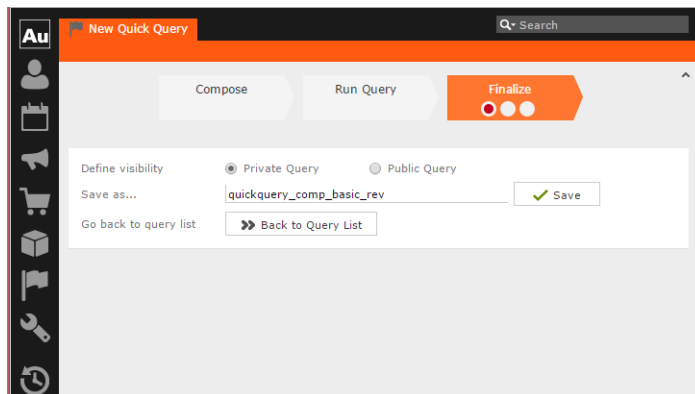
The following screenshot shows a popup change notification:
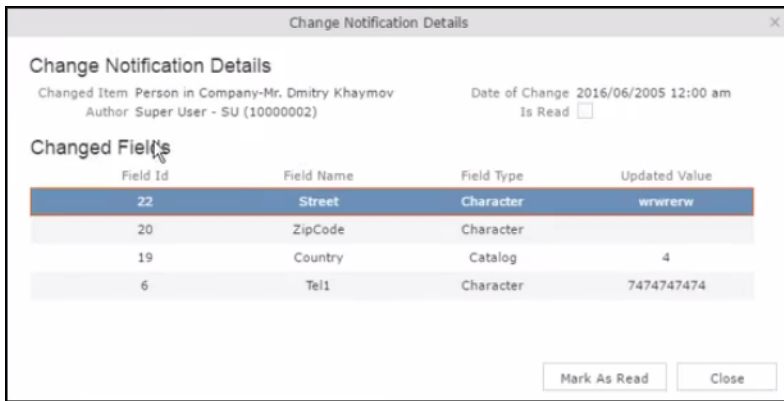
The remaining sections describe the various tasks required to create and work with Watchlist items.

Adding items to the Watchlist

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.
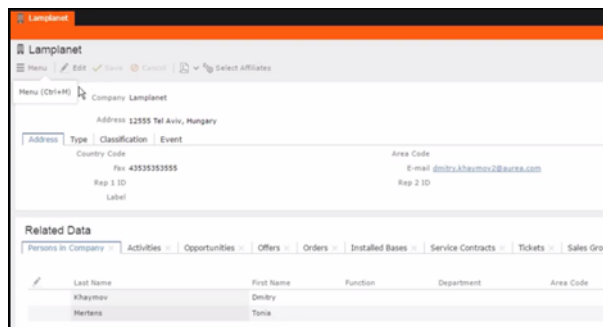
2. From the context menu items, select **Menu** > **Watchlist** > **Add Items to Watchlist**.
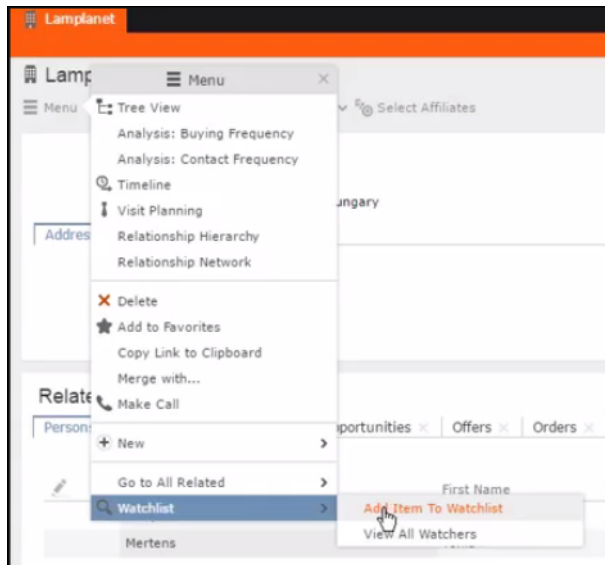
The **Add Item to Watchlist** window displays.

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 will be displayed on the dashboard. Two widgets for recent changes and today's changes are displayed. They also display the number of change notifications.

  - **Popup Notification**—Change notification popups when you login, displaying the change details.

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

4. Specify the **Notify on** event from the following:

- **Every change**—you are notified when any of the record's field is modified.
- **Change on Specific Fields**—you are notified when the fields of interest in a record are changed.

   To specify the field of interest perform the following steps:

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

      The Select Fields extension window displays.

      New:Analysis *
      ✓ Save   ✕ Delete   ≫ Run Analysis
      Analysis name [   ]   ⦿ Private   ○ Public
      Query name [Select a query   🔍]
      ≫ Run Analysis

   2. Select the fields of interest that you want to be notified, on change. You can enter the field name in the search box to quickly find the fields of interest. You can select multiple fields.

5. Click **Save**.
6. The record is successfully added to the watchlist. Notice that now the Watchlist menu provides you with further submenu items.

Editing Watchlist Item

You can edit an existing watchlist item on a record and change the notification types and event details that generate the notifications.

To edit a watchlist item, perform the following steps:

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

2. Select **Menu** > **Watchlist** > **Edit Watchlist Item**.
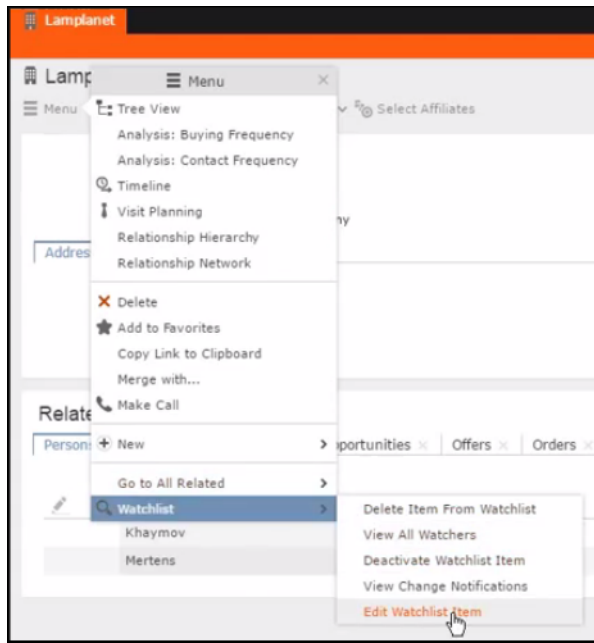
The **Edit Watchlist Item** window displays.
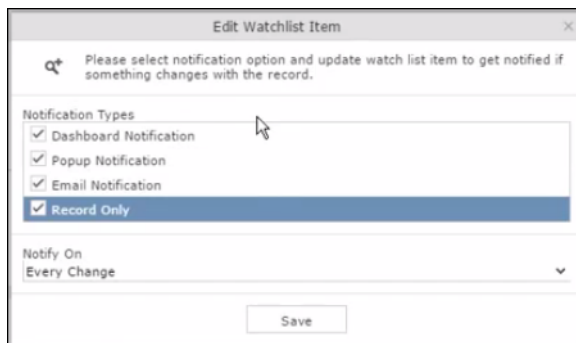
3. Select or unselect the **Notification Types**.

Note: Ensure that at least one **Notification Type** and **Notify On** even is specified.

4. Modify the **Notify On** event as described below:

• **Every change**—you are notified when any of the record's field is modified.

• **Change on Specific Fields**—you are notified when the fields of interest in a record are changed.

To specify the field of interest perform the following steps:

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

   The Select Fields extension window displays.
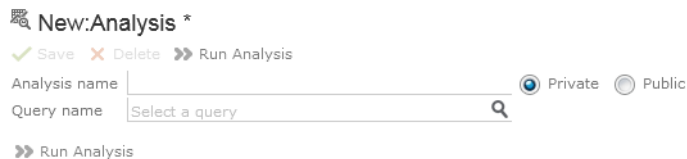
2. Select the fields of interest that you want to be notified, on change. You can enter the field name in the search box to quickly find the fields of interest. You can select multiple fields.

5. Click **Save**.

   The changes are saved to the watchlist item.

Deleting an Item from the Watchlist

You can delete a watchlist item added to a record, if you no longer wish to watch the changes to the record.

To delete an item from a watchlist, perform the following steps:

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

2. Select **Menu** > **Watchlist** > **Delete Item from Watchlist**.

   A confirmation window displays.
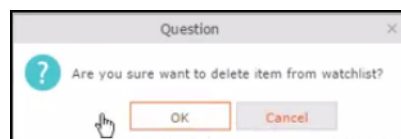
3. Click OK.

   The item is removed from the watch list.

View all Watchers of a Watchlist item

To view all watchers subscribed to a watchlist item:

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

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

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

Activate/Deactivate watchlist subscription item

To stop a watchlist item from generating change notifications, you can deactivate the watchlist item. Similarly, you can activate the watchlist item when you want to receive change notifications. You can activate or deactivate a watchlist item from two locations. You can search for watchlist item from the Watchlist subscriptions search page and deactivate or activate it from there. On the other hand if you know the record for which watchlist item was created, then you can deactivate it from the record's watchlist context menu.

Activate/Deactivate from watchlist subscription search page

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

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

   The Watchlist Subscription Search page displays.

2. Populate the required search filters and click **Search**.

   The search results displays.

> **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.
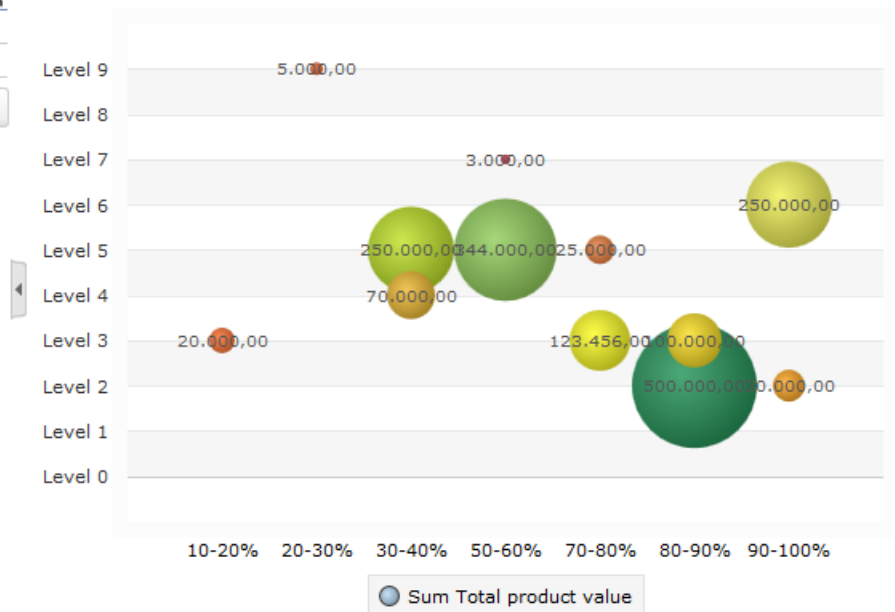
Activate/Deactivate from record's context menu

To deactivate or activate watchlist item from the watchlist context menu of a record:

1. Search corresponding infoarea and open the required record.

2. To deactivate the watchlist item:

   a. Select **Menu** > **Watchlist** > **Deactivate Watchlist** item.

   A confirmation window displays.
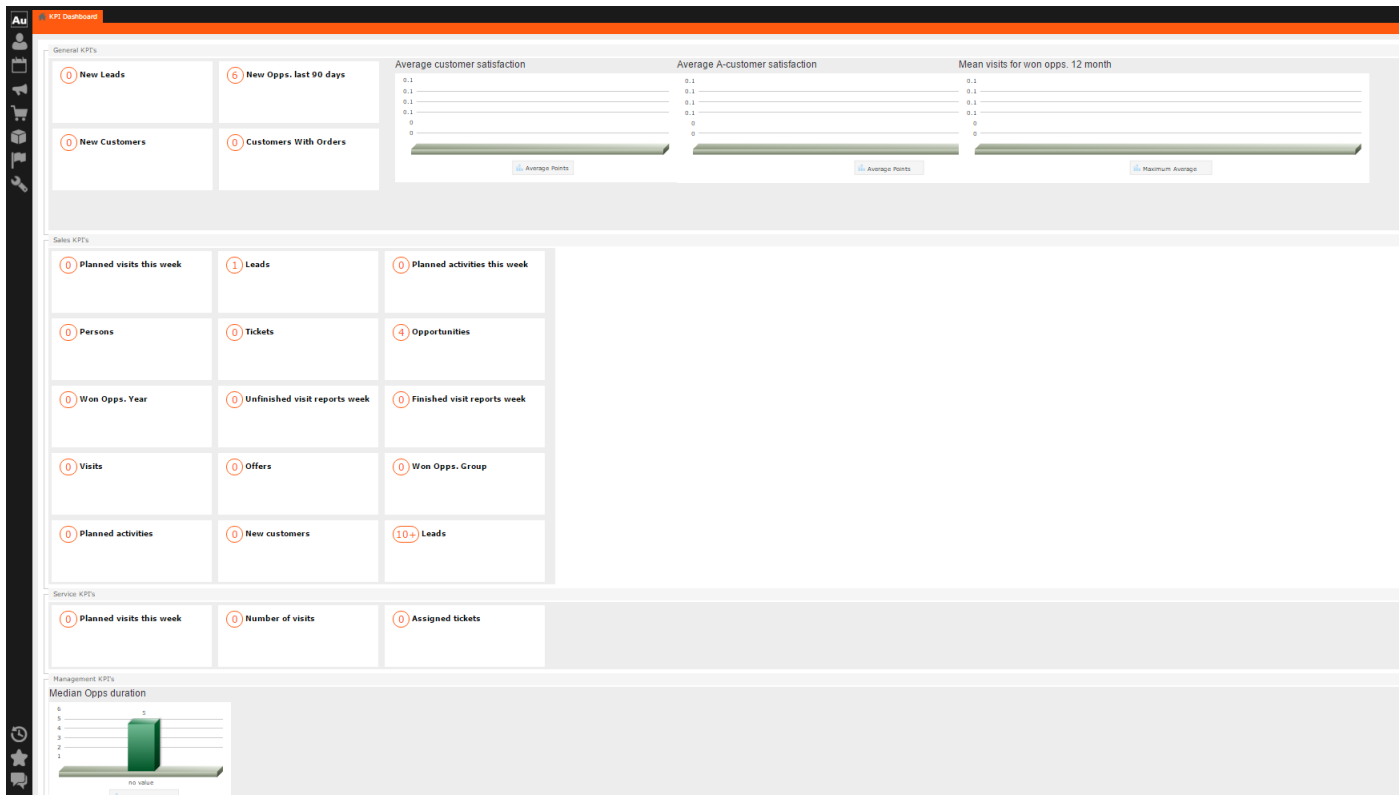
b. Click **OK**.

The watchlist item is deactivated.

3. To activate the watchlist item:

a. Select **Menu** > **Watchlist** > **Deactivate Watchlist** item.

A confirmation window displays ⅋ .

b. Click **OK**.

The watchlist item is activated.

Search watchlist subscriptions

To search the watchlist subscriptions, perform the following steps:

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

The Watchlist Subscription Search page displays.

2. Select the search filters from the following list:

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

  Only one person can be selected. If select the ☑ Created by me filter, the search will be restricted to watchlist items created by you.

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

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

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

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

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

3. Select the notification type and read status filters of the watchlist subscriptions.

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

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

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

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

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

To select an item perform the following:

a. To activate a filter item, click

The icon changes to a checkbox(⊘).

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

4. Click Search.

The search result is displayed in the bottom pane.

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:

- 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**.
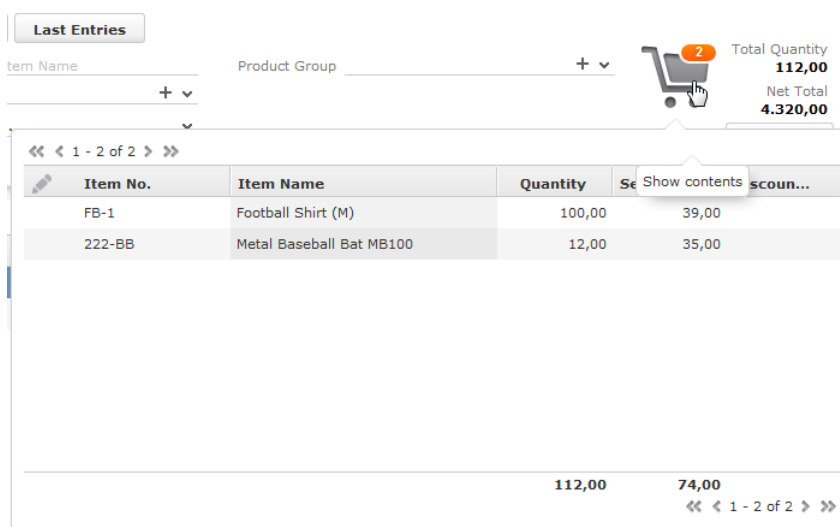
- The Change Notifications Details window displays.

- Click **Mark as Read**.

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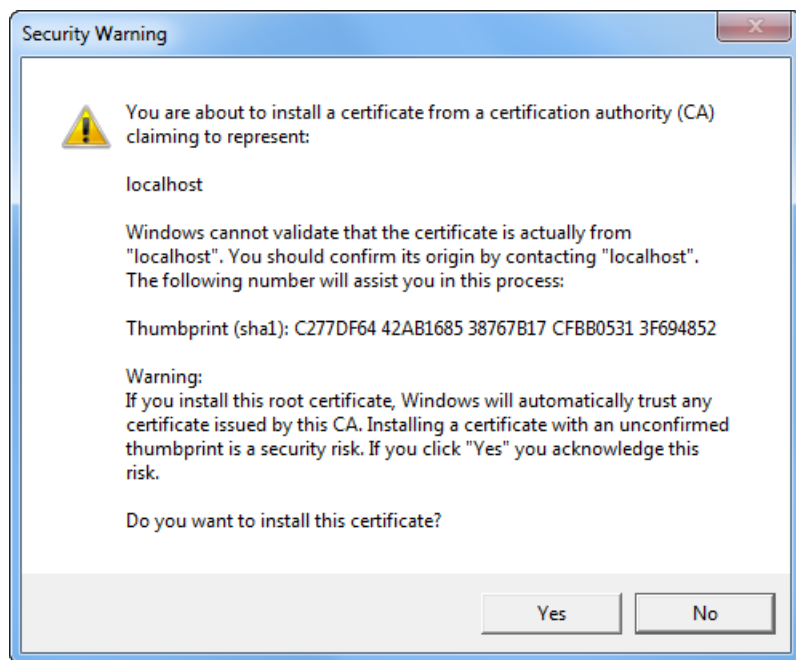
Change Notifications on the Dashboard

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

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

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

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

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

Analyses

Analyses are based upon queries and display the resulting records in an aggregated form including a graphical representation of relationships, >> Queries on page 123. 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

To load a previously defined analysis:

1. Select ![icon] (**Queries & Analyses**)> **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, >> Editing the Analysis on page 194.

   • Execute the analysis, >> Executing an Analysis on page 187.

Executing an Analysis

To execute an analysis:

1. Load an analysis, >> Loading an Analysis on page 187.
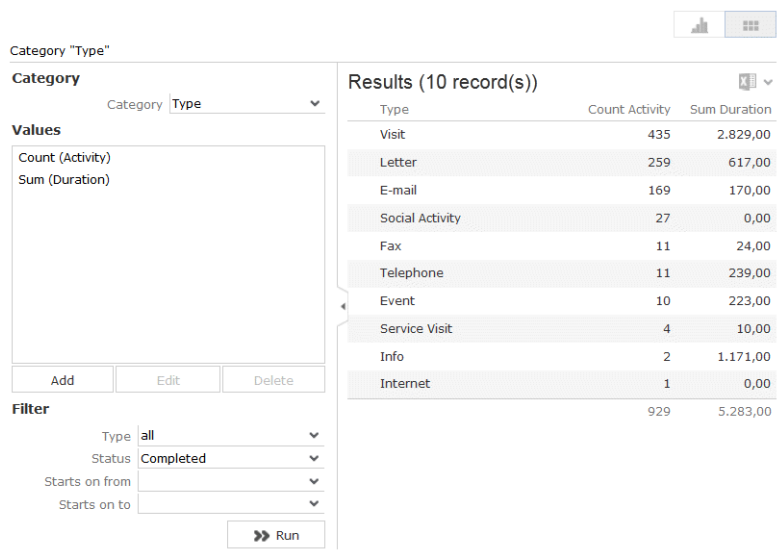
   The **Result** tab displays the values defined in the analysis.

2. Select the desired category from the drop-down list.

3. Click on **Add** to add a new value. Click on **Edit** to edit an existing value.

- Use the **Type** drop-down list to determine whether the sum or the number of values should be analyzed, or whether a maximum, minimum or the mean should be calculated.

- Enter data for the filters in the corresponding fields.

4. To execute the analysis:

- Click on ≫ (**Start**). The analysis is executed using the values you last entered (**Category**, **Values**, **Filters**). The analysis need not be saved.

- Click on ≫ (**Run Analysis**) to execute the saved analysis.

- Press Enter.

You can also execute analyses directly from the list (after accessing the page by selecting 🏴 (**Queries & Analyses**) **> Analyses**). Select **Run** from the context menu.

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

5. Click on **Export** (🗷) to export the data as either CSV or XML, depending on your settings, >> Handling Tab on page 63.

Note: If you execute an analysis and then edit data in the analysis in another tab, the analysis is not automatically updated. For performance reasons, the results of the analysis is cached. Clicking on **Run Analysis** accesses the data in the cache.In order to update the analysis results, select a different filter and then run the analysis again.

Changing the Result Categories

You can change the result categories or filter them according to certain criteria.

To change the category:

1. Load an analysis, >> Loading an Analysis on page 187.

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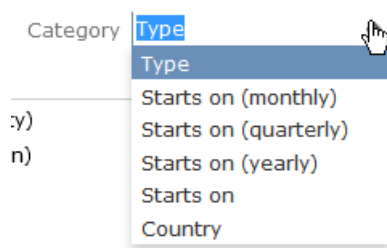
3. If fields have been defined as filters in the analysis, you can define filter criteria in order to restrict the results of the analysis.

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

Cumulative Analyses

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

Displaying Results as Charts

You can display the results of your analysis graphically. You can choose between bar or pie charts.

To display your results graphically:

1. Execute the analysis, >> Executing an Analysis on page 187.

2. Click on the **Show Chart** tab.

3. Use the drop-down list to determine the type of chart, e.g. a bar or pie chart. The chart is displayed.
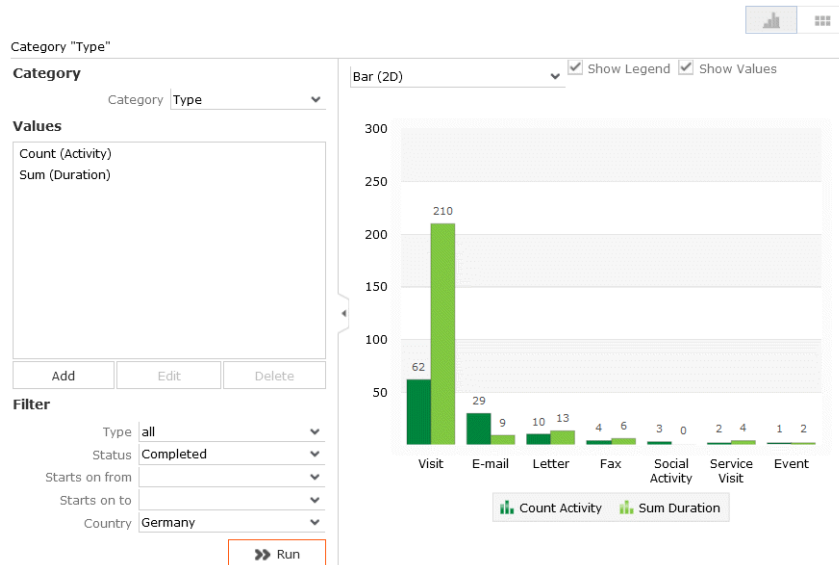
Defining Analyses

To define an analysis:

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

2. The **New: Analysis** window is displayed.
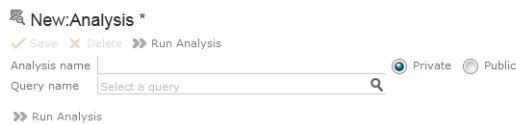
3. Enter the name of the analysis. You must enter a name to save the analysis.

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, >> Defining Analysis Categories on page 191
- Values, >> Defining Analysis Values on page 192
- Filters, >> Defining Analysis Filters on page 193
- List, >> Defining the Analysis List View on page 193

7. Save the analysis.

Defining Analysis Categories

To define the categories in an analysis:

1. Define an analysis, >> Defining Analyses on page 190 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 will also include 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, >> 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.

The following options are available:

- Use the check box to the left of the values to determine which values data can be analyzed by.

- **Percentage-dependent:** Enable this check box if you want to total all weighted values. You need to have selected a **Percentage Field** from the drop-down under **Define Defaults Values** for this setting to be applied.

- **Currency-dependent:** Enable this check box if you want to convert the contents of currency fields to the currency used by the analysis. You need to have selected a **Currency Field** from the drop-down list under **Define Default Values** for this setting to be applied.

Defining Analysis Filters

To define filters for an analysis:

1. Define an analysis, >> Defining Analyses on page 190 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 will be informed that the analysis cannot be executed.

  Use this option if too many records would otherwise be included in the analysis, in which case the analysis may take a long time to execute.

Defining the Analysis List View

After executing the analysis, you can select **Display Details** from the context menu in the results list to view a list containing the results of the analysis. You need to define which fields are displayed in this list beforehand.

To define the list view for an analysis:

1. Define an analysis, >> Defining Analyses on page 190 or load an existing one.

2. Click on the **List** tab.

3. Define which fields are displayed in the list and their properties.

Categories, Values, Filter	List		
Columns for Result Details			Display All
	No. in List	Width	
Type (Activity)	3	10	
Status (Activity)	5	10	
Last Name (Person)	1	25	
First Name (Person)	2	25	
Country (Person)	4	15	
Date of Birth (Person)	6	15	
		100%	

>> Run Analysis

The following columns are available:

- **No. in List:** Enter the position (column number) of the value in the list.
- **Width:** Enter the column width as a percentage of the total width. The sum total of all widths should be 100%.

Editing the Analysis

To edit an existing analysis:

1. Load the analysis, >> Loading an Analysis on page 187.

2. Click on ❤ (**Show/Hide**) in the header.

    The area used to define the analysis is displayed.

3. Edit the analysis.

4. Save your changes.

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

Note: If you edit an existing analysis (i.e. change the info areas, fields and/or conditions), an asterisk (*) is displayed in the header after the name of the analysis until you save the analysis.

Drill-Down and Drill-Up

You can analyze a value in the analysis further and proceed downwards step by step (drill-down). Conversely you can return from lower levels to higher levels (drill-up). Only the category fields selected in the analysis are available here (apart from those that are analyzed at the top-most level).

Note: If your analysis contains locked catalog values, and your administrator has determined that you cannot display locked catalog values, the results of drilling down may differ from the results displayed beforehand.

To drill down step-by-step:

1. Execute an analysis, >> Executing an Analysis on page 187.

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 on page 193.

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.

Bubble Charts

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

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

By default, Aurea CRM web includes two bubble charts:

• Opportunity Bubble Chart

• Ticket Bubble Charts

Opportunity Bubble Chart example:
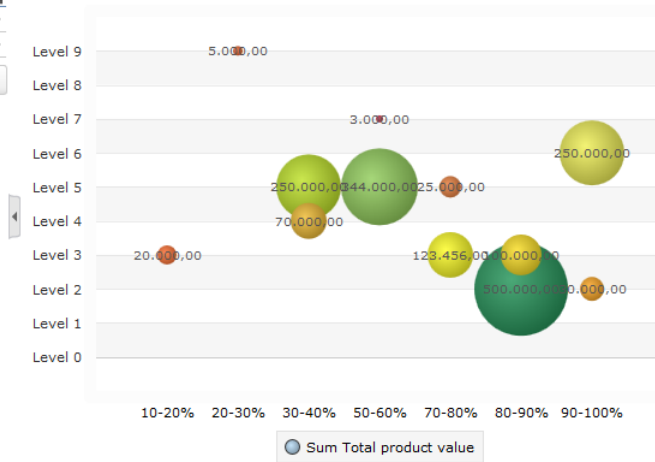
Your administrator can define additional charts.

Key Performance Indicators Dashboard (Enterprise CRM)

The KPI dashboard provides a quick measure of your business metrics primarily focusing on customer development and management. It shows the current state of your sales for existing and new customers. This would be very useful in monitoring open calls, new customers of interest and other related information without having to be informed by e-mail.

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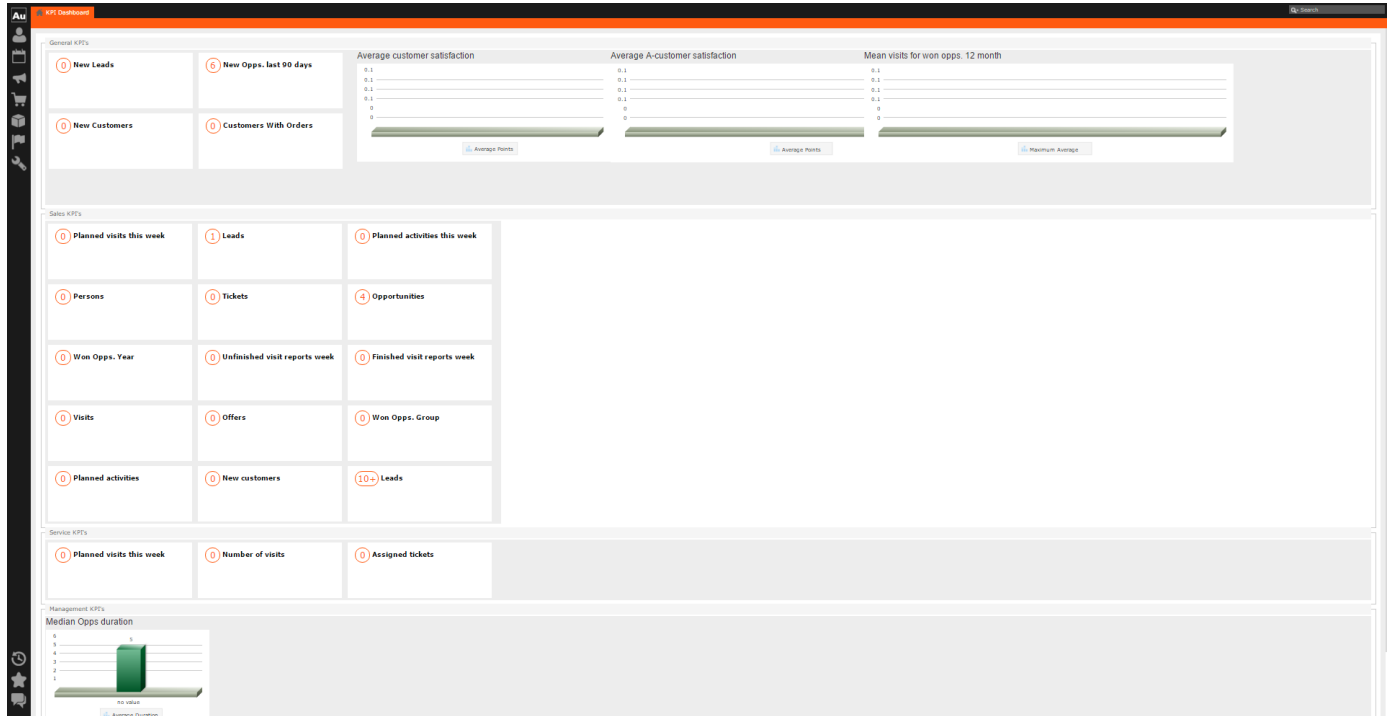
You can find the following metrics displayed in the KPI dashboard under various categories:

KPI Category	Type	Name on the dash-board	Descripton
General	Query	New leads	Number of new po-tential customers (leads) developed per 90 days.
General	Query	New Opps. last 90 days	Number of new op-portunities in the last 90 days.
General	Query	New Customers	Number of new cus-tomers (have placed 1 order) in the last 90 days.

KPI Category	Type	Name on the dash-board	Descripton
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 represenative.

KPI Category	Type	Name on the dashboard	Descripton
Sales Rep	Query	Leads	Number of leads (potential customers) for the current sales representative.
Sales Rep	Query	Planned activities this week	Number of visits planned for this week for the current sales representative.
Sales Rep	Query	Persons	Number of new persons planned for the current sales representative.
Sales Rep	Query	Tickets	Number of tickets for the current sales representative.
Sales Rep	Query	Opportunities	Number of opportunities for the current sales representative.
Sales Rep	Query	Won Opps. Year	Number of won opportunities for this year for the current sales representative.
Sales Rep	Query	Unfinished visit reports week	Number of unfinished visit reports for this week for the current sales representative.

KPI Category	Type	Name on the dash-board	Descripton
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.

KPI Category	Type	Name on the dash-board	Descripton
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 Dura-tion	Graph depicting the median of the dura-tion of each opportu-nity.

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

Quick Add

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

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

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

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

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

Switching to Edit Mode

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

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

- Click on ⅜ (**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.
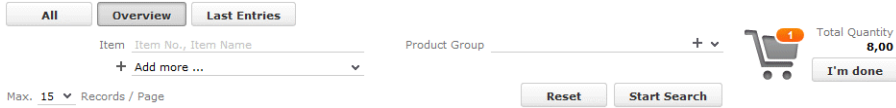
You can further restrict the items listed by entering additional criteria in the search mask.

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 using Quick Add

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

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

1. Select (**Sales**) > **Orders** from the menu.

2. Search for the desired order.

3. Switch to edit mode, >> Switching to Edit Mode on page 203.

4. The item master is listed.

5. Restrict the items that are listed:

   • Enter search criteria in the search mask.

   • Click on one of the buttons to apply the corresponding filter, >> Special Filters on page 203.

6. Click on an item in the results list, and enter the desired values (e.g. quantity and end price) in the list.

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

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

7. If you switch between items, your settings are saved automatically. You can also click on 🚫 (**Cancel**) and ✔ (**Save**). Rows in the list where a corresponding item record have been added are indicated with a small shopping cart icon.

8. Additional information on the selected items is displayed beneath the list of items:

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

Shopping Cart

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

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

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

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

Deleting Data in the Quick Add Area

To delete data in the quick add area:

1. Click on **Overview**.

   The items for which data has been entered are displayed.

2. Select the item you wish to delete and click on ✕ (**Delete**).

Multilingual Texts

Your administrator can determine that you can enter texts in multiple languages. For example, if your company has branches in multiple countries, you can define a questionnaire in the country-specific languages.

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

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

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

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

Notes

Notes allow you to add information that cannot otherwise be stored in the database structure, e.g. directions for reaching a customer as text.

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

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 209.

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 will be 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 will periodically prompt you for authorization. See the screenshot below.
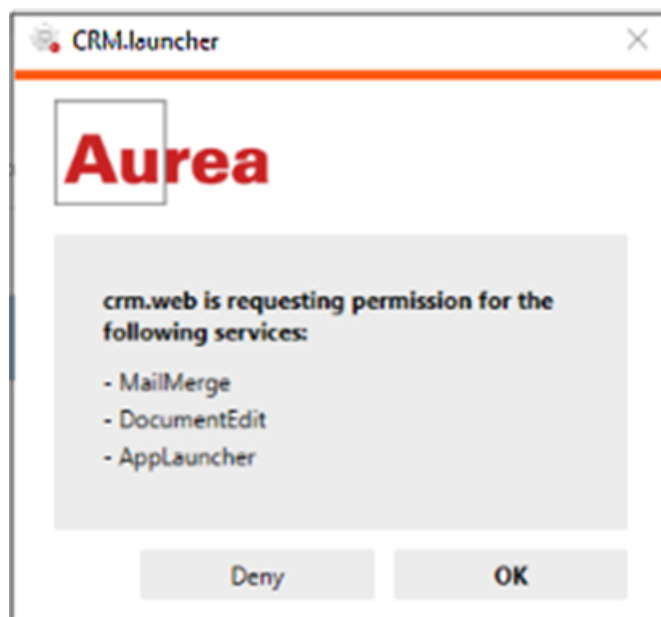
Note: Aurea software recommends using Google Chrome as your browser, as problems may occur under certain circumstances when using Firefox.

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

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:

Plug-in required for documents is not available. Please check that the Plug-in installation is correct and is active. Click here to download Plug-in.

Close
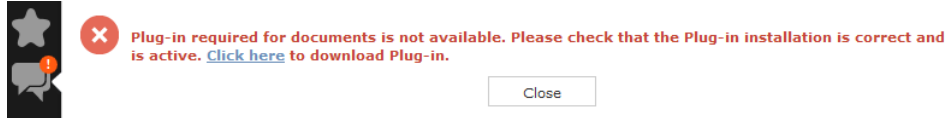
2. Download the application and executed CRM.launcher.exe.

CRM.launcher is installed automatically.

3. Confirm the installation (**Finish** button in the **CRM.launcher - InstallShield Wizard**).

4. Once the installation is complete, a certificate is displayed. You need to install this certificate.
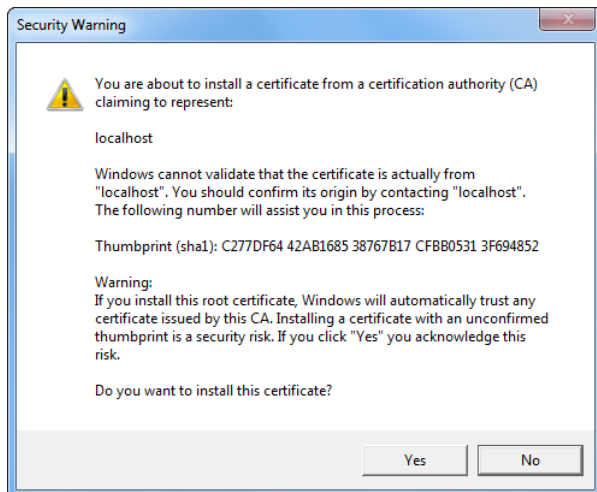
5. Return to Aurea CRM web and perform the action again.

CRM.launcher in the Windows Taskbar

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

1. Right-click on in the taskbar.

2. Select the desired option:

- **Check for Updates**, >> Check for Updates on page 211.
- **Open offline CRM** or **Open online CRM**, >> Starting Aurea CRM web offline in Offline or Online Mode on page 213.

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

- **Settings**, >> Switching Languages on page 211, Creating Bug Reports on page 212 and Port Settings on page 212.

- **Exit**

Check for Updates

Select this option to update the application if an update is available.

Select **Check for Updates**:

- If an update is available, it is installed.

- Contact your administrator if CRM.launcher determines that the version on the server is not compatible with your client version, and no update is available.

Once you have completed the installation, you can choose to work in online mode (if you have a network connection) or in offline mode:
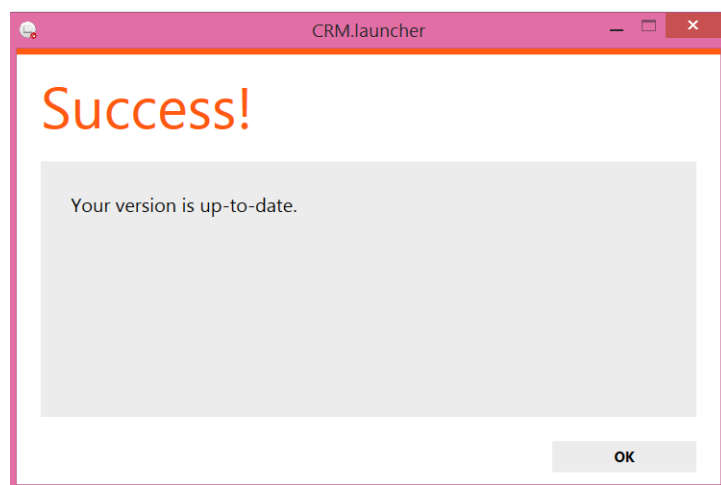
Switching Languages

To change the language:

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

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

3. Click on **OK**.

Creating Bug Reports

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

To create an error report:

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

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

    The **Bug Report - Options** dialog displays.

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

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

    ---

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

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

Port Settings

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

Your administrator can determine that you cannot change the port.

Closing and Restarting CRM.launcher

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

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

Uninstalling CRM.launcher

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

Using CRM.launcher with Mozilla Firefox

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

Aurea CRM web offline

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

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

Starting Aurea CRM web offline in Offline or Online Mode

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

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

- Click on either (**Open offline CRM**) or (**Open online CRM**) after installing the latest version.

- Select on either **Open offline CRM** or **Open online CRM** from CRM.launcher's context menu.

2. The system then checks when data was last synchronized, and you can choose whether you wish to synchronize data. You can only synchronize data if you can connect to the online database.

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

3. Click **Offline Synchronization** to start synchronizing.

4. Once synchronization is complete, you can choose to use Aurea CRM web in online mode or to switch to offline mode.

Administrative Tasks

You can perform administrative tasks in Aurea CRM web. However, you require the necessary access rights to do so, >> Roles and CRM Processes on page 19. 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 chapters of the User Manual.

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

Companies and Persons

Use the **Accounts** menu to add new companies and persons, or to search for existing records. This chapter does not cover general functions such as searching, editing records etc., >> General Functions on page 15.

The **Company** info area is an independent info area, i.e. companies are not added to other, parent records. Persons can be added to companies (as contact persons) or as independent records (e.g. private persons).

Customer Data

Data such as the company name, address, telephone and fax numbers of your clients and potential clients are stored in the **Company** info area.

Information on persons is stored in the following info areas:

- The **Person** (PE) info area is used to store the actual data concerning persons, e.g. their name, date of birth, private address etc.

  Use the **Person** info area to store private bank customers, or doctors that have both a practice and are also employed at a clinic, for example.

- The **Contact Person** (CP) info area is used to store person data related to a specific company, e.g. the person's department, position, telephone extension etc.

- The **Person in Company** info area displays all person data in the context of a specific company by combining information in the **Person** and **Contact Person** info areas. If you add a person to a company who is not already present in the database as a person (PE) record, a new person record is added automatically.

Additional Addresses

You can add additional addresses for companies (and persons, if you system is configured accordingly), e.g. separate billing addresses. You can also enter additional addresses for persons and companies involved in a property.

You can only add a single additional address per **Address Type** per company/person/property.

Merging Companies and Persons

Duplicate company and person records in the database can be merged to form a single record. The source record (from which the process is started) is deleted.

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 that all data in either the first or second record should be retained.

The record the merge process is initiated from is referred to in the following as the "source record"; the record the source record is being merged with is referred to as the "target" record. The source record is removed from the database once the records have been merged. The target record is saved and contains the merged data.

To merge companies or persons:

1. Select **Merge with** from the company or person's context menu (e.g. in the search results list or tab view). You can also mark the two entries in the results list you wish to merge and select **Start Merge Process** from the context menu.

   The process used to merge records is started and the company 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 is used**: The modification date of the individual fields in both records are compared with one another and the most recent value is retained.

5. Click on **Continue.**

6. The option selected in the previous step determines what is displayed next:

- If **user decides conflict resolution** was selected, you can select the field values to be retained.

  By default, all fields in the source record are selected (highlighted in green). To retain the value in the field in the target record, click on the contents of the field in the **Target [company]** column.

- If you previously selected **Target record always "wins"** or **Source record always "wins"**, an overview is displayed, but you cannot make any changes.

- No overview is displayed if you selected **In the case of conflict the newer record wins.**

7. Click on **Continue.**

8. If child records have been added for both the source and target record and these also contain identical or similar data, these also need to be merged. Click on **Continue** to merge each child record. The option selected for the parent record is also applied to the child records.

Note: Your administrator can determine whether all fields are listed, or only those where the contents differ. If only the fields that differ are displayed, child records may be listed without any fields - in this case, the contents of the fields in both

records are identical. However, the record's keys will be different (which can cause conflicts); you therefore need to click on **Continue** for each record.

9. Click on **Start Merge Process**.

Contact Times

You can enter contact times for companies and persons, e.g. opening hours or a person's work hours. These times are color-coded in the daily and weekly planning area to aid you in planning new appointments for a customer using drag&drop**.**

Contact times must be entered separately for each day of the week. You can enter contact times for the morning, afternoon and other time periods. You need to define both the start and the end of each of these time periods. If you enter an end time that is earlier than the start time, a message is displayed.

You can also enter holiday periods during which a company is closed. These holidays are taken into account when planning visits in Aurea CRM web.

To enter contact times for a company or person:

1. Select **New** > **New Contact Time** from the company or person's context menu.

2. Select the **Type** and **Weekday** and enter the contact times in the appropriate fields.

3. You can also enter a responsible rep.

   If reps have been assigned to a customer, your administrator can determine that the contact times entered for the current day for that rep's customers are displayed under **Related Data**.

Relationships

Relationships are used to depict hierarchies and networks between companies and persons. You can store relationships between companies and persons (e.g. parent and subsidiary companies, sales partners, suppliers, competitors) and display the resulting networks.

Adding Relationships

To add a new relationship:

1. Select **New** > **New relationship** from the company or person's context menu.

The system guides you through the process of adding the new relationship.

2. Choose whether you want to add a relationship with a company or a person.

3. Select the record you want to add the relationship with. You can also choose to add a new record; to do so, click on ⊕ (**New**) in the header of the search results.

4. Determine whether a reciprocal relationship should be added.

Note: When adding a new relationship, the **Create reciprocal relationship** check box is enabled by default in Aurea CRM web. If the type of relationship you are adding is between two companies and of the type "Parent", the reciprocal relationship is "Subsidiary" (i.e. one company is the parent company and the other is the parent's subsidiary). The type of reciprocal relationship is displayed for each relationship in the **Reciprocal Rel. Type** column.Your administrator can change the default behavior of this check box.

---

5. Select an existing relationship on the **Predefined** tab of switch to the **Customize** tab to define a new relationship.

a. Enter the **Type** of relationship, the **Relationship** and the **Business Area**. The first row defines the relationship, the second row defines the reciprocal relationship.

b. Click on **Continue** to add the relationship**.**

Note: Aurea recommends that your administrator prevent the **Relationship Type**, **Relationship** and **Department** fields from being edited, as any changes made to these fields are not applied to the reciprocal relationship (>> Rights Module in the *CRM.core Administrator Guide*). If you delete a relationship, the reciprocal relationship is also removed.

Searching for, Editing and Deleting Relationships

To search for and edit a relationship:

1. Select **Go to All Related** > **All Relationships** from a company or person's context menu.

   The **Search Relationships linked to [name]** page is opened. Click on **Start Search**. The results of the search are displayed.

2. Enable the **Company-Related** option to prevent person-related relationships from being displayed (i.e. to only display relationship between two companies).

3. You can edit relationships as follows:

   - Double-click on a record in the list or select **Edit** from the record's context menu.

   - Select **Delete** from the context menu to delete the relationship. A message is displayed and you can determine whether only the relationship should be deleted, or whether the reciprocal relationship should also be deleted.

Relationship Hierarchy

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

To display the relationship hierarchy:

1. Select **Relationship Hierarchy** from the desired company or person's context menu.

   A hierarchical overview of the relationships is displayed.
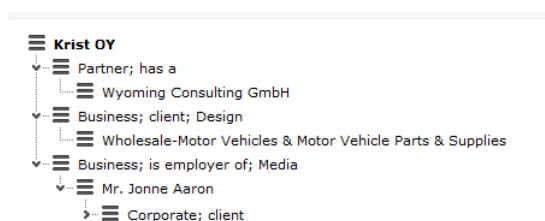
The company you opened the relationship hierarchy from is displayed in bold.

2. Click on an entry to display the related record's data below the hierarchy.

3. Click on ≡ (**Show Menu**) next to an entry in the hierarchy and select **Tab View** from the context menu.

Cyclical Relationships

If cyclical relationships exist (e.g. A is partner of B; B is a partner of C; C is a partner of A), one of the companies/persons needs to be displayed more than once. One occurrence is defined as the **main record** and the other as duplicates. Duplicates are indicated using an *.

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

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.).

To display the relationship network:

1. Switch to the desired company or person.

2. Select **Relationship Network** from the context menu.

   The relationship network is displayed.
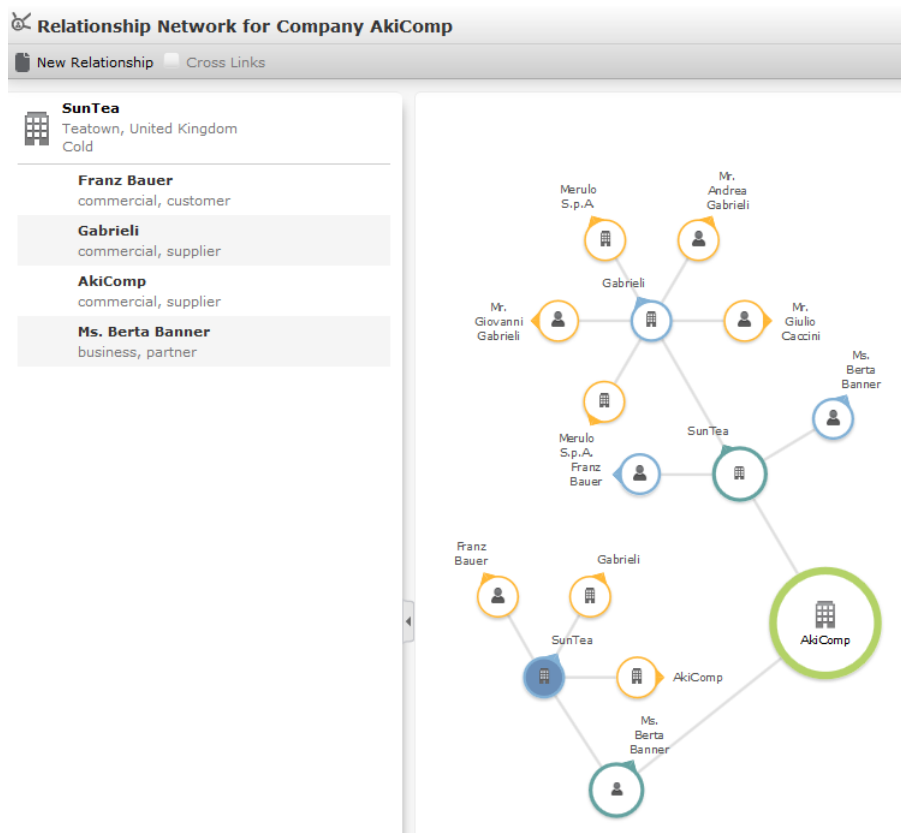
- The current record (company or person) is displayed at the center (large node with a green border). All records that are linked to the current record via a relationship are displayed surrounding the current record. Reciprocal relationships are not displayed.

- Move the mouse cursor over a connecting line to display the type of relationship.

- Click on ▶ on the left to open the side bar containing a list of the relationships stored for the current record (note that any predefined filters are also applied to this list). Open the context menu for an entry in the list and select the person or company's name to display the company or person in the quick view. Click on ◀ to close the side bar.

- Click on a node in the tree to select that company or person. The list of relationships on the left is updated to display the relationships defined for the selected company or person.

- Double-click on a node to open the corresponding record.

- Click again on a selected node to hide or display all relationships defined with that company or person. The nodes are color-coded according to their level in

the network (i.e. how many degrees of separation lie between the node and the current record).

- Select a node and click on ⊕ **New Relationship** to add a new relationship for the selected company or person, >> Adding Relationships on page 224.

  The relationship tree is refreshed once the relationship has been added.

- Click on a node and hold down the mouse button to open the company or person in the quick view. You can access the record's context menu from the quick view.

- Use your mouse wheel to zoom.

- You can scroll the view and reposition nodes in the network:

  - Click anywhere in the network where the ✛ mouse cursor is displayed to scroll in the network.

  - Click on a node and then click on it again while holding down the mouse button (the mouse cursor is displayed as 🖑) to move the node. Any child nodes are also moved.

- If the current record has relationships with more than 10 records (by default), the ‹ and › nodes are displayed. Click on these nodes to display additional records that relationships have been defined with.

- Enable the **Cross Links** option to prevent the same record being displayed multiple times in multiple nodes (when more than one company or person is related to the same company/person). Each company/person is only displayed once and a dotted line indicates the additional relationships with a node.

Example: If a relationship is defined between a person and two companies in the network, the person is displayed twice, once per 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
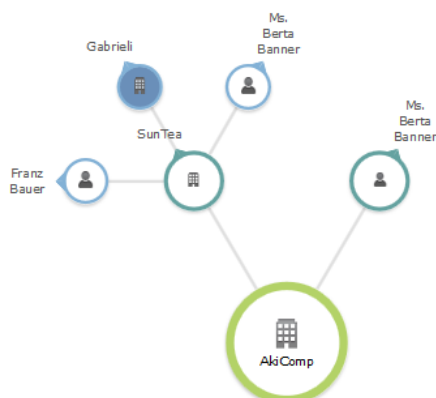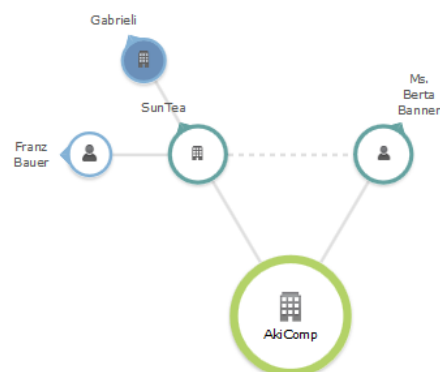
Note: Your administrator can customize how the relationship network is displayed, e.g. how many levels in the network are displayed initially (default = 1, i.e. only the direct relationships with the current record), determine which types of relationships are displayed, the number of child records that are displayed etc., >> CircleOfInfluence in the *Aurea CRM web Administrator Guide*.

The relationship network can also be used to display corporate structures, >> HierarchicalCircleOfInfluence in the *Aurea CRM web Administrator Guide*. The large node at the center of the chart always displays the root of the corporate structure. If you open the chart from a company that is not the root, the current company's node is expanded.

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 Levels** .

2. Click on **Start Search** and then on ⊕ (**New**).

3. Define the **Relationship type**, **Relationship** and **Business Area** for both the relationship and the reciprocal relationship, and enter the appropriate **Level**.

4. Save the record.

   The defined relationship can then be selected when defining relationships.

The **Level** field is used to determine the hierarchical structure formed by the relationship (>> Relationship Hierarchy on page 227) and which company is the root of the hierarchy:

- For all relationships that are not part of a hierarchy (i.e. partnerships), the field should remain empty.

- For those relationships defined at the top of the hierarchy, the value is 1; the value for the reciprocal relationships is 2 in this case.

For each further level, the value of the upper level is always 1 lower than the level below. i.e. for the second level (the one below the parent), the Level is 3 for the relationship and 4 for the reciprocal relationship.

Note: Because records in the **Relationship level** info area define pairs, these records should not be edited once entered. If you want to redefine a relationship, delete the existing records first.The relationships defined in the **Relationship level** info area are **only** applied to reciprocal relationships added in the **Relationship** info area. Reciprocal relationships added in the **Company Hierarchy** info area are not taken into account.

Enable the **Relationship hierarchy** field if the relationship level record defines a relationship used to define a corporate structure, >> Corporate Structure on page 232. The following criteria need to be met:

- A reciprocal relationship must exist.

- The **Level** field in the record must contain a value that is higher or equal to the level in the reciprocal relationship.

- The same value must be entered in the **Relationship type** and **Reciprocal Rel. Type** fields.

Corporate Structure

You can depict the structure of corporations using relationships in Aurea CRM. The corporate structure can include hierarchical relationships and relationships on the same level. The corporate structure can be used to define access rights and to display corporate hierarchies, >> Conditional Access to Info Areas in the *CRM.core Administrator Guide*.

Companies and persons may be present in more than one corporate structure; for example, a company may be part of a corporate group in one structure and a supplier in another.

The corporate structure can be used to grant access to child records of companies and persons (nodes in the example trees below), e.g.:

- Child records stored for records directly above the current node in the corporate structure all the way to the root node.
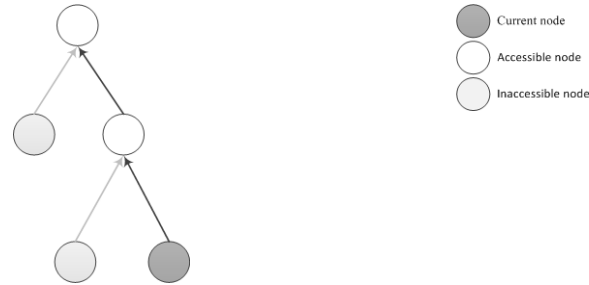
  In this case, you can display all child data stored for parent companies linked to the current company using corporate structure relationships. These are the companies entered in the relationship records with a **lower** relationship level than the current company.

- Child records stored for records directly below the current node in the hierarchy.
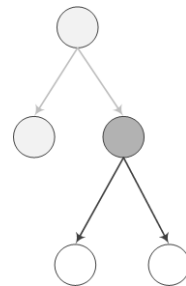
  In this case, you can display all child data stored for child companies linked to the current company using corporate structure relationships. These are the companies entered in the relationship records with a **higher** relationship level than the current company.

Relationship records are used to store the type of relationship between a source company/person and a target company/person. The hierarchy itself is defined in the relationship records using the station and serial numbers of relationship records (not company/person records). The keys of relationships higher up in the hierarchy and of the current relationship are automatically entered in the **PB_1_StaNo/SerNo - PB_10_StaNo/SerNo** fields in one of the relationship records (if applicable, the one with a lower level). These fields depict the path from the current relationship record to the root relationship record; the root relationship's key is always entered in the **PB_1_StaNo/SerNo** fields. The root relationship itself thus only contains a link to itself in the **PB_1_StaNo/SerNo** fields, and the **Generated** check box is enabled for this relationship. This relationship record is added automatically.

To define the corporate structure, suitable relationships first need to be defined in the **Relationship Level** info area, >> Defining Relationship Levels on page 231. The **Relationship type** and **Reciprocal Rel. Type** must **both be the same** and the **Relationship hierarchy** field needs to be enabled in the child relationship level record (i.e. the relationship with a higher **Level**). In the case of relationships on the same level, the check box should only be enabled in one of the relationship level records.

	Relationshi...	Relationship	Level	Reciprocal Rel. Ty...	Reciprocal Rel.	Reciprocal R...	Relationship hierarchy
	Corporate	is parent of	1	Corporate	is subsidiary of	2	
	Corporate	is subsidiary of	2	Corporate	is parent of	1	✓

Whenever new relationships are added using the relationship defined in the relationship level record, links to the relationship records corresponding to nodes higher up in the corporate hierarchy are entered in the **PB_1_StaNo/SerNo-PB_10_StaNo/SerNo** fields in the child relationship (i.e. the relationship corresponding to the relationship level record where the **Relationship hierarchy** check box is enabled). The corporate hierarchy can consist of up to 10 levels.

Example: The corporate structure is defined for five companies. Company 1 is at the root level, Company 2 is defined as a subsidiary of Company 1, Company 3 as a subsidiary of Company 2 etc. all the way down to Company 5 at the bottom of the hierarchy. The corporate structure above the current relationship is entered in the relationship records added for the "is a subsidiary of" relationship (Company 2 is a subsidiary of Company 1, Company 3 is a subsidiary of Company 2 etc.).

The "is a subsidiary" relationship added for Company 5 (located at the bottom of the hierarchy) contains links to all "is a subsidiary" relationships in the hierarchy in the **PB_X_StaNo/SerNo** fields. **PB_5_StaNo/SerNo** contain the station number and serial number of the "is a subsidiary" relationship added for Company 5 (Company 5 is a subsidiary of Company 4); **PB_4_StaNo/SerNo** contain the station number and serial number of the "is a subsidiary" relationship for Company 4 (Company 4 is a subsidiary of Company 3) etc.

If you make changes to the records in the **Relationship Level** info area, including enabling the **Relationship hierarchy** check box, you can update the corporate structure automatically. If you disabled the **Relationship hierarchy** check box in a relationship level record used by the corporate structure and update the corporate structure, the entries in the **PB_1_StaNo/SerNo-PB_10_StaNo/SerNo** fields are deleted. If you delete a node (relationship record) in the corporate hierarchy that has child nodes, the child nodes immediately below the deleted records become the root nodes of new corporate hierarchies.

To update the corporate structure automatically:

* Aurea CRM win: Select **Generate Relationship Hierarchy** from the context menu in the **Relationship Level** info area.

* Aurea CRM web: Use a CRM.server To-Do (type 9), >> To-Do Types in the *CRM.core Administrator Guide.*

Note: The **PB_X_StaNo/SerNo** fields are not communicated and are recalculated when inputting the communication file. The same applies when importing records. By default, updating the corporate structure does not initiate any triggers defined for the **Relationship** info area and the records' time stamps are not updated. The corporate structure can be displayed graphically in a relationship network, >> HierarchicalCircleOfInfluence in the *Aurea CRM web Administrator Guide.*

Corporate Structure Links

Aurea CRM offers indirect links (via the **Relationship** info area) that can be used to defined queries applied to the corporate structure, for example.

Links 950-980 and 30000-36000 are available by default and apply to all relationships used to define corporate structures (irrespective of the type of relationship), >> Link IDs in the *CRM.core Administrator Guide.*

Indirect links (using the corporate structure) for companies and persons (FI/KP/PE/CP) applied to their child info areas:

* **30000:** Returns the entire corporate structure
* **32000:** Returns all companies and persons higher up in the hierarchy
* **34000:** Returns all companies and persons lower down in the hierarchy
* **36000:** Returns all companies and persons both higher up and lower down in the hierarchy

The following image outlines the difference between links 30000 and 36000. This also applies to the 950 and 980 indirect links.
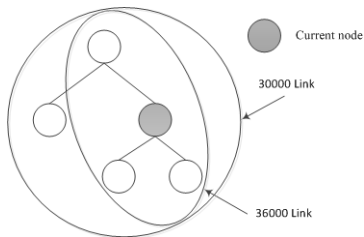
Example: The corporate structure is defined for five companies. The current rep is entered in the **Rep 1** field of Company 2 (C2). An offer exists for each company.
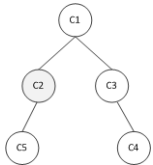
Define a query that returns all offers stored for companies where the current rep is entered (in this case Company 2), as well as all offers stored for companies that are linked to companies where the rep is entered via the corporate structure.

Link **32000** returns the offers for companies 1, 2 and 5.

Link **34000** returns all offers for companies 2 and 5; link **30000** returns the offers for all companies and link **36000** returns the offers for companies 1, 2 and 5.

You can define variables of the **Type** "Condition" to define additional links using your own condition. You can define up to 10 different conditions for corporate structures using the 30000-130000 links. These links are numbered in intervals of 10,000 and are named (in Aurea CRM win) according to the relationship type (e.g. supplier, corporate).

You can define the following 10 variables:

`CORE::INDIRECT-PB-LINK-TREE-0` (this variable further restricts the default links 30000-36000)

`CORE::INDIRECT-PB-LINK-TREE-1`

`...`

`CORE::INDIRECT-PB-LINK-TREE-9`

Example: Define the variable `CORE::INDIRECT-PB-LINK-TREE-1` in Aurea CRM win. Select the **Relationship** info area in the **Info Area** field, the **Relationship type** field in the **Field Name** field and "Condition" in the **Type** field. Add a variable value for the variable and enter the comparison field and desired relationship type in the **Var. Text** field, e.g. "Corporate".
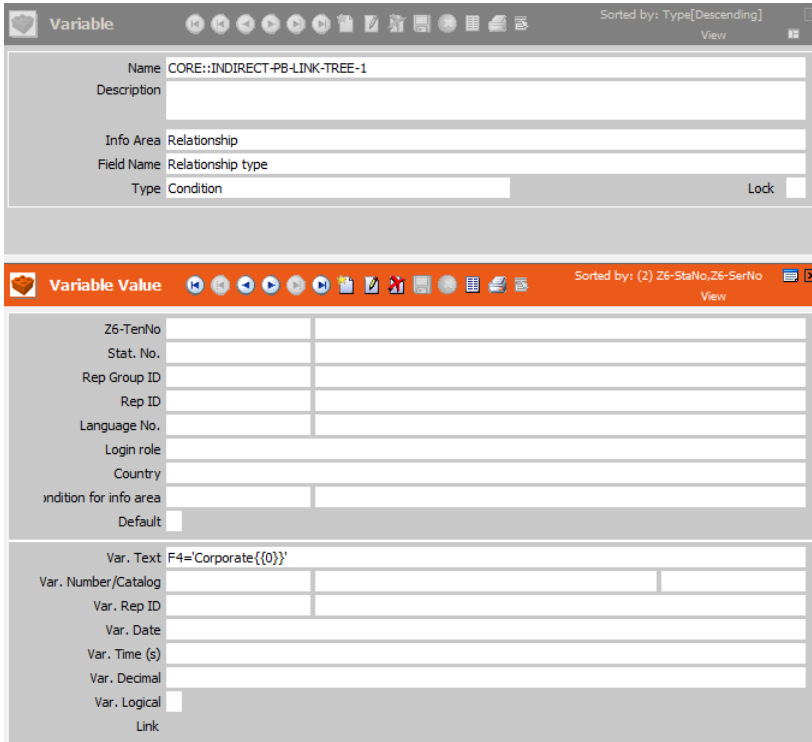
If you define conditional access rights for the **Company** info area in the Right module in Aurea CRM win and apply conditions to the **Company** info area, you can select the default indirect links and the links that only apply to the relationship type used to define the corporate structure in the **Index Relationship** column. For example, this allows you to determine that a rep can access all Dutch companies as well as any subsidiaries of those Dutch companies where a corporate relationship has been defined.
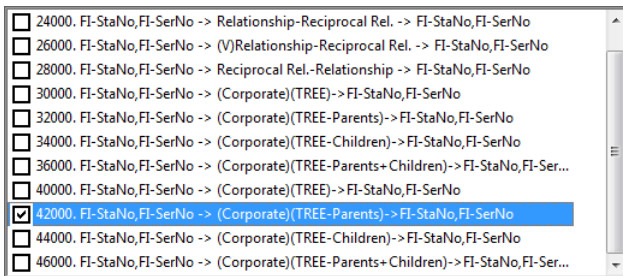
Note: For more information on variables, >> Variables in the *CRM.core Administrator Guide*. You can also use indirect to define conditional access to companies and persons' child info areas, >> Conditions Applied via Indirect Links in the *CRM.core Administrator Guide*.

Affiliation View

By default, only child data added for the current customer (person, company) is displayed. The affiliation view allows you to display data concerning other customers that are flagged as being affiliated with the current customer. For example, you can display activities for both the current person and all affiliated persons, or also display activities for the subsidiaries of a company.

Click on ![Au] and select **Affiliation View** to enable the affiliation view globally (indicated by a tick in the check box). Aurea CRM web stores this setting between sessions.

Note: For more information on relationships and activating the affiliation view, refer to the *Aurea CRM web Administrator Guide* (Affiliation View chapter) and the *CRM.core Administrator Guide*. Use the **Applies to the following info areas** configuration entry (**Affiliations** category) to determine the info areas that can display records in the affiliation view.

You can define filters to restrict which data is displayed, >> Select Affiliates (Button and Dialog) in the *Aurea CRM web Administrator Guide*.

When defining a query, you can enable the **Include Affiliations** option to include records stored for affiliates in the results. If the status of the check box is ![?], records stored for affiliates are included in the results if the **Affiliation View** check box is enabled in the main menu. When defining a query, pay attention to the fact that the **order of the SQL statements (queries applied to info areas**) affects the results. If company B is affiliated with company A, and you define a query applied to the activities of company A (**Include Affiliations** is enabled), it makes a difference whether the query is first applied to FI or MA records. In the first case, all activities stored for companies A and B (affiliated companies) are returned; in the second case, only the activities stored for company A are returned (MA is a child info area and thus not part of the affiliation).

If you define affiliates for a company or person, the **Affiliate** check box is enabled in the relationship **records** where the relationship between the two entities is defined. When applying queries to affiliates, the system checks whether this field is enabled by applying a condition to it. You can also define that a different field should be used, >> Alternative Condition for Affiliation View in the *Aurea CRM web Administrator Guide*.

Example:

Tickets displayed for a customer in the default view:

Tickets displayed for a customer in the affiliation view, including tickets added for all affiliates.

The affiliation view is available in lists, queries, the timeline and the tree view.

Note: The affiliation view only displays data stored for records that are direct affiliates of the current record. In other words, when displaying data for companies in a hierarchy, only the records added for a direct subsidiary are displayed, not records stored for any sub-subsidiaries. If you define affiliates to be displayed in the affiliation view of a customer (**Select Affiliates** button), these settings are visible to all users.

Your administrator can configure that only information on parent records is displayed in the affiliation view (e.g. when viewing activities, the company the activity was added for), >> Extended Options (showOnlyForAffiliations) in the *Aurea CRM web Administrator Guide*.

To determine which customers are displayed in the affiliation view:

1. Switch to the desired customer.

2. Click on 🔘 (**Select Affiliates**).

   All customers where a relationship with the current customer has been defined are displayed graphically in a relationship network, >> Relationship Network on page 228.

   Move the mouse cursor over a connecting line to display the type of relationship.

3. Click on a node to select it and click on **Add to Affiliation** or **Remove from Affiliation** to define whether the corresponding record is an affiliate of the current customer.

   You can select more than one node (Ctrl + Click).

Affiliates are highlighted in orange. Hover the mouse cursor over a node to display whether that company or person is defined as an affiliate.

4. Click on **Close** to close the view.

   Select **Close & Refresh** to close the view and refresh the display to include data stored for the selected affiliates.

Relationship and Affiliation View Links

Aurea CRM includes (indirect) links that can be used to query data in child info areas for companies and persons that are linked via a relationship, >> Relationships on page 224. For example, you can define a query that returns all activities stored for the members of a family.

The following indirect links exist from companies/persons (FI/KP/PE/CP), and can be used to query child info areas based on relationships (PB):

- 24000-25999: Returns all child records that exist for companies/persons in relationships defined from the current record (the current record is the source record in the relationship).

- 28000-29999: Returns all child records that exist for companies/persons in relationships defined to the current record (the current record is the target record in the relationship). This corresponds to querying the reciprocal relationship queried by 24000-25999.

- 26000-27999: Returns all child records that exist for companies/persons entered in relationships defined from the current record and that are affiliates of the current record (Affiliate check box is enabled).

Note: The current record's child records are always displayed. Each record is only displayed once (e.g. an activity with several companies in a corporation is only displayed once, not once for each company).

The following links are available from the **Relationship** (PB) info area to all info areas that include an indexed link to the **Company** (FI) and/or **Person** (PE) info areas:

- 900-919: Returns all records that are linked to the source company/person in the relationship record.

- 920-939: Returns all records that are linked to the target company/person in the relationship record.

For a more detailed description of the available links, >> Affiliations und Link IDs in the *CRM.core Administrator Guide*.

Examples:

The relationship "is a parent of" is defined between a mother and her three children. A reciprocal relationship ("is a child of") is defined for her two daughters, but not for her son. The son and one of the daughters are defined as affiliates of the mother. An activity has been added for each family member.

Search Relationships linked to Ms. Mama Mia

Search Results

Relationship type	Relationship	Person
family	is parent of	Mr. Sunny Mia
family	is parent of	Ms. Peggy Sue Mia
family	is parent of	Ms. Dotty Mia

A query using **link ID 24000** applied to the mother returns the activities of all family members.

Person
  Output Fields: First Name

First Name = "Mama"

    WITH **Activity** (24000. PE_StaNo,PE_SerNo -> PE-StaNo,PE-SerNo)
    Output Fields: Subject
  + Conditions

Max. 100 ∨ rows

Query Result   Export (MS Excel)

First Name	Subject
Mama	Activity for Daughter 1
Mama	Activity for Daughter 2
Mama	Activity for Mother
Mama	Activity for Son

A query using **link ID 28000** applied to the mother returns the activities of all family members where a (reciprocal) relationship has been defined from the family member to the mother.

Person
  Output Fields: First Name

First Name = "Mama"

    WITH **Activity** (28000. PE_StaNo,PE_SerNo -> PE-StaNo,PE-SerNo)
    Output Fields: Subject
  + Conditions

Max. 100 ∨ rows

Query Result   Export (MS Excel)

First Name	Subject
Mama	Activity for Mother
Mama	Activity for Daughter 2
Mama	Activity for Daughter 1

A query using **link ID 26000** applied to the mother returns the activities of all family members that are also defined as affiliates (**Affiliate** is enabled in the relationship record).

A query applied to the relationship "is a parent of" using **link ID 900** returns all activities linked to the **source record** once for each relationship.

A query applied to the relationship "is a parent of" using **link ID 920** returns all activities linked to the **target record** in the relationship record.

Portfolios

Portfolios allow you to classify your customers by answering a series of questions. Customer classifications help you define your customer strategy.

A portfolio consists of a questionnaire. The questions in the questionnaire are weighted and the results are displayed graphically.

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.

To add a new portfolio configuration:

Click on **Settings** > **Maintenance** > **Portfolio Configuration** .

1. Click on **Start Search** and then on ⊕ (**New**).

2. Enter the name of the portfolio configuration in the **Text** field.

3. Enter the number of columns and rows in the portfolio, which determines the total number of sectors (columns x rows).

4. 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.

5. Save the record.

Defining Portfolios

To define a portfolio:

1. Select **Settings** > **Maintenance** > **Portfolio** .

2. Start the search and 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 Area Code** and **Field Number** to determine that the classification determined using the portfolio is written to the corresponding field.

Note: By default, the first character in the **Classification** field of the portfolio sector description is transferred to the **ABC** field in the record from which the portfolio was accessed. If you enter an **Info Area Code** and **Field Number**, the value in the **Classification** field is entered in the selected field instead. Whether the entire description or only a portion is entered in the target field depends on the length of the target field.
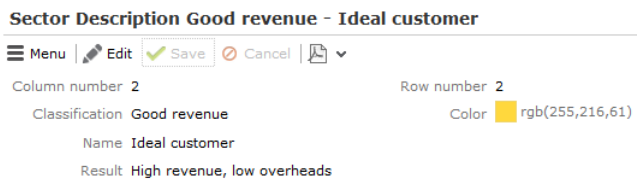
When transferring the result of a portfolio to a field in the **Person** (PE), **Person in Company** (KP) or **Contact Person** (CP) info areas the following applies:

- If no generic link is entered in the survey (U1) and the survey is linked to the info area the result should be entered in (**Person** (PE), **Person in Company** (KP) or **Contact Person** (CP)), the result is written to the specified field.

- The result of the portfolio is also updated in the **Person** (PE) info area if the survey is linked to a company (FI) and Person (PE).

---

9. Save the record.

10. Define the sector descriptions:

    a. Click on **Portfolio sector description** and then on ⊕ (**New**).

    b. Enter the column and row number of the sector the description applies to (e.g. if you have 4 sectors, row 1/column 1 is the bottom left sector; row 2/column 2 is the top right sector).

    c. Enter a text in the **Name** field that is displayed in the portfolio's legend. Enter a text in the **Classification** field that is displayed in the sector itself. Enter a text in the **Result** field that is displayed to the right of the sectors.

Sector Description Good revenue - Ideal customer

≡ Menu | ✏ Edit | ✔ Save | ⊘ Cancel | 📄 ⌄

Column number 2	Row number 2
Classification Good revenue	Color ▮ rgb(255,216,61)
Name Ideal customer	
Result High revenue, low overheads	

11. Click on **Questions** in the tree and define the questions and answers in the portfolio, >> Defining Questions on page 283 and Defining Answers on page 285.

Assigning Portfolios and Classifying Customers

To assign a portfolio to a record:

1. Switch to the desired record (e.g. a company or opportunity).

2. Select **New > New Portfolio** from the context menu.

3. Search for and select the desired portfolio.

    The sectors defined in the portfolio are displayed in the top area, the questions in the portfolio are displayed in the lower area (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. Save.

6. The result is written to to the **ABC** field in the record the portfolio was started from (or another field if defined in the portfolio).

Demand

The **Demand** info area provides you with an overview of the your (potential) customers' demands.

You can enter the product group and product that a customer is interested in or requires as well as the date the product is first required, the frequency with which the product is required (**Demand Frequency** field) and the **Unit**. This allows you to determine when a product is likely to be required.

Select **New** > **New Requirement** from a company's context menu to add a demand record.

Miscellaneous

The following info areas are not accessible in the default version of Aurea CRM web.

Your administrator can however add these info areas to your Aurea CRM web configuration.

City/Country

When adding companies or persons (PE/KP), the city and telephone codes are entered automatically once you have entered a country and postal code based on the entries in the **City** info area.

Records can be added to the **City** info area as follows:

- When adding a new company or person: if no matching entry is found in the **City** info area, a new record is added to the **City** info area.
- By importing data
- By manually adding new records in the **City** info area (**Service** module)

Country's international dialing codes are stored in the **Country** table.

Lead Status

The **Lead Status** info area logs how long a company or person was classified with a specific lead status, which rep classified them and why their classification was changed. This provides you with valuable information, e.g. on the effect of advertising campaigns.

Whenever a new company, person or sales group record is added or their lead status is changed (**Lead Status** field), a new record is added to the **Lead Status** info area. When adding or changing the status in a sales group record, the **Product Group** is also transferred to the **Lead Status** info area.

Depending on the status of the **Product Group** field, the **Lead Status** info area logs changes to the following:

Product Group is empty	Changes to the lead status of a company or person
Product Group contains a value	Changes to the status of a sales group

You can also add, edit or delete records in the **Lead Status** info area directly.

Note: Your administrator can configure that changes to the **Lead Status** field in the **Company**, **Person** and **Sales Group** info areas are not logged in the **Lead Status** info area, or that the window asking for a reason for a change is not displayed, >> *CRM.core Administrator Guide*.

Example:

A company's **Lead Status** is set to "Interest".

After talking with a representative of the company, you assume that you will conclude a deal. As a result, you change the lead status to "Lead". The "mood thermometer" rises.

Enter a reason for the change or select a reason from the **Reason** catalog (Aurea CRM win only).

The new lead status is entered in the **Lead Status** info area and the length of time the lead status was set to the previous value is calculated.

Using Sectors in Company Selections

You can define hierarchical sector structures in Aurea CRM win which can be used by selections. You could define the software sector as part of the IT sector, in which case software companies will be included in selections containing IT companies.

You can access the industry table from both the **Company** and **Sales Group** info areas.
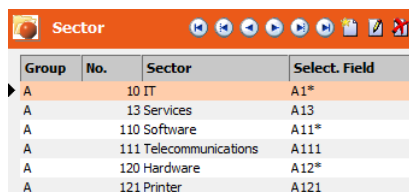
Note: Your administrator can define that you can only access certain sector groups or number ranges. Access to the **Sector** catalog accessed by the **Sector** - **Sector 4** fields can be denied in the **Company** and **Sales Group** info areas. Access to the catalog values can also be denied by defining tenant access rights, >> *CRM.core Administrator Guide*.

Defining Sectors

1. Select **Info** > **Sector** from the menu.

2. Click on **New** to define a record for each level in the hierarchy.

   a. Enter a value in the **Group** field; e.g. "A".

   b. Use the **No.** field to define the hierarchy by entering digits: the first digit refers to the first branch level, the second digit refers to the second level etc. If you wish to add further partitions to a level, enter "0" as the last digit ("10" for the first branch). "0" can only be used for this purpose, and must be the final digit.

The **Select. Field** field automatically displays the combined values you entered in the **Group** and **No.** fields. A "0" is replaced by an asterisk (*).

c. Save.

Assigning a Company to a Sector

1. Switch to the **Company** info area.

2. Double-click the **Sec.Gr.1** or **Sec.No.1** field. You may need to select **View** > **All Mask Fields** from the menu to be able to access these fields.

The **Sector** dialog is displayed.

3. Select a sector.

The **Sel.Field** and **Sector** are entered automatically.

You can select further sectors in the **Sec.Gr.2**, **Sec.No.2** etc. fields.

Selecting Companies by Sector

1. Switch to the **Selection** info area.

2. Click on **Company** in the **Condition** column.

3. Select the **Sel.Field1** field by enabling the check box next to it.

The **Define Search Conditions** dialog is displayed.

4. Double-click in the field below **Compare with**.

The **Sector** dialog is displayed.

5. Select a sector.

6. Save the selection.

Note: Companies in all child sectors are selected as well.If you apply a condition to the **Sel. Field 1** field, the condition is also applied to the other selection fields; i.e. if you search for "IT" companies in **Sel. Field 1**, the search will return all companies where "IT" is entered in any of the **Sel. Field X** fields.

Specialization

The **Field**, **Occupation** and **Share** fields in the **Specialization** info area are used to store a person's fields of expertise and what share of their entire workload is spent completing tasks related to their specialization.

3

Appointment Management

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, >> Calendar on page 252.
- Display, edit and delete appointments, >> Adding Appointments on page 255, Opening Appointments on page 256 and Editing Appointments on page 257.
- Use filters to determine which appointments are displayed in the calendar, >> Filtering Appointments on page 257.
- Handle conflicting appointments, >> Appointment Planning on page 259.
- Send and reply to e-mails from appointments, >> Activities and E-mails on page 265.
- Store information such as absences, >> Absences on page 268.
- Use tasks, reminders and To-Dos to structure your work, >> Tasks on page 267.
- Schedule customer visits in the daily and weekly planning view Daily and Weekly Planning on page 270.
- Display the availability of reps in the resource view, >> Resources on page 273.

Calendar

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

To open the calendar:

1. Select ▣ (**Collaboration**) **> Calendar**.
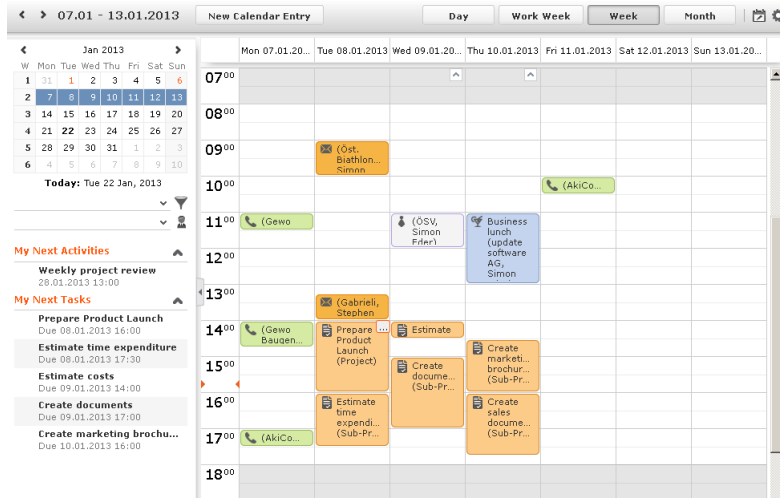
- Different types of appointment are indicated using different icons (for telephone calls, visits etc.). Click on ⚙ (**Edit Settings**) to determine how appointments are color-coded (e.g. by type or rep).

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

- Private activities (i.e. where the **Private** field is enabled) are indicated with the 🔒 icon.

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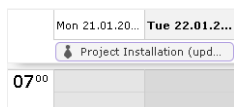
- Concurrent appointments cannot be displayed in the calendar's week view. Click on "…" to display these appointments in a new window.
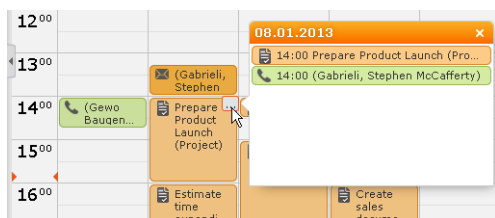
- Only a limited number of appointments can be displayed per day in the monthly view. Click on **+ x more** to display all the appointments in a separate window.

- 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:
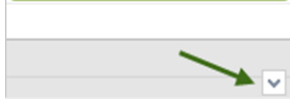
- You can display your most important appointments (e.g. your next 5 activities or To-Dos) in the sidebar. Click on ⚒ (**Settings**) > **User Configuration** to select which items to display in the sidebar (**Activities** tab). Your administrator can determine how many records are displayed.

- You can filter the records displayed in the calendar to only display those you require, >> Filtering Appointments on page 257.

  Note: In order to display To-Dos in the calendar, you need to enable the **Calendar** check box in the To-Do record.

- You can display or hide the sidebar:
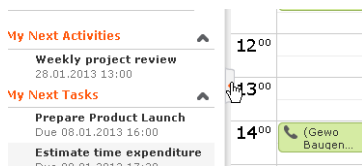
- Holidays are color-coded. To determine which holiday calendar you wish to use, click on ⚒ (**Settings**) > **User Configuration**, >> Date & Time Tab on page 65.

- If the time zone used by your device is changed (automatically or manually), you can determine that Aurea CRM takes the current time zone into account (provided you have the necessary access rights), >> Date & Time Tab on page 65. You need to close and restart your web browser to display the new time zone in the calendar.

Navigating in the Calendar

You can navigate in the calendar using the following options:

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

- You can use the calendar in the sidebar to:

  - Click on a day to switch the view to just that day.

  - Click on a calendar week to display that work week.

  - Click on the month or year and select an entry from the drop-down list update the calendar accordingly (the view type remains unchanged).

  - Use the arrows to move forward or back one month

  - When in the day view, hold down Ctrl and click on days in the calendar to display multiple days at once.

  - Click on **Today** to display the current date in the day view.

- Click on (**Daily & Weekly Planning**) to open the daily and weekly planner.

Adding Appointments

To add a new appointment:

1. Select (**Collaboration**) > **New Activity**, **New Absence** or **New Task** from the menu.

2. When adding an activity, select the company or person you wish to add the activity for.

3. Enter the necessary data and save.

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**.

2. Select whether to add a new activity, absence or task, or to add a new activity for yourself, your company or the last company/person you viewed, >> Appointment Types on page 259.

3. When adding an activity, select the company or person to add the activity for.

4. Enter the details and save.

Note: If the system is configured to check for conflicting appointments, the appointment planning area is displayed if an activity or absence conflicts with an existing appointment, >> Appointment Planning on page 259. Your administrator can determine which types of appointments are checked for conflicts.

You can also add an activity for yourself as follows:

1. Switch to the day, work week or week view in the calendar.

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

A quarter hour period is highlighted in gray.

3. Start typing to enter a subject for the activity and confirm your entry with Enter.

The appointment is added, and you are automatically entered as the rep.

Opening Appointments

To open an appointment:

• 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 **Tab View** 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 259 and the online field help.

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, >> Conditions on page 134.

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

   The filter set is saved.

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

---

5. Click on **OK**.

Defining Rep Filters

To define a rep filter:

1. Click on ♟ (**Reps and Rep Groups**) in the sidebar.

   The **Reps and Rep Groups** window is displayed.
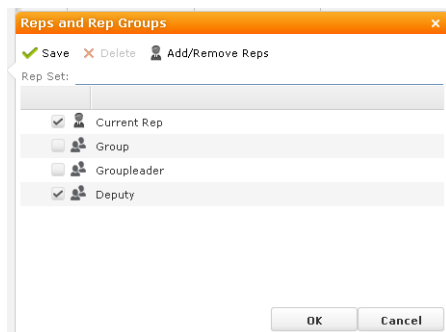
2. Enable the check boxes next to the reps or groups whose appointments should be displayed.

3. To add additional reps to the list:

   a. Click on **Add/Remove Reps**.

      The **Select Rep** window is displayed, >> Selecting Reps on page 109.

   b. Select the desired rep and click on **OK**.

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

The rep set is saved.

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

5. Click on **OK**.

Appointment Planning

The appointment planning area is opened automatically if appointments conflict. To open it manually, open an activity, switch to edit mode and click on 📅 (**Appointment Planning**). You can move the appointment in this area while taking into account the availability of all reps.

Note: Enable the check for conflicting appointments in the user settings, >> Activities Tab on page 65. Conflicting appointments are only checked when adding activities from outside the calendar; conflicting appointments are displayed next to one another in the calendar.If the blue bar indicating the current appointment is covering an existing appointment, you cannot display tooltip information for the existing appointment. Move the new appointment to be able to display the tooltip.

Appointment Types

Activities are used to store details regarding contact with customers, >> Activities on page 260.

Tasks allow you to store tasks, e.g. what needs to be completed within the scope of projects (which may be customer-independent), >> Tasks on page 267.

Absences allow you to store absences, e.g. sick leave, vacations, visits to doctors, >> Absences on page 268.

Activities

You can add participants to activities and determine their participation type and status, >> Adding Participants on page 260.

For information on follow-up activities, >> Follow-up Activities on page 261.

For information on recurring activities, >> Recurring Activities on page 261.

To add a reminder for an activity:

1. Enter values in the **Reminder duration** and **Reminder unit** fields on the **Details** tab.

For example, if you enter "5 Min", the reminder is displayed for all participants 5 minutes before the activity is due to start.

Adding Participants

To add participants to an activity:

1. Add internal reps as participants in the **Required**, **Optional** and **For Information** fields:

- Click on **Add a value** and select an entry from the drop-down list:
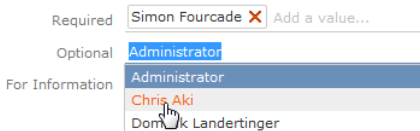
- Or click on **Add a value** and begin typing the name of the rep. Aurea CRM lists all matching reps.

- Click on 👤 (**Select Rep**), to select the desired rep in a separate window, >> Selecting Reps on page 109. You can then select the desired participation type from the rep's context menu.
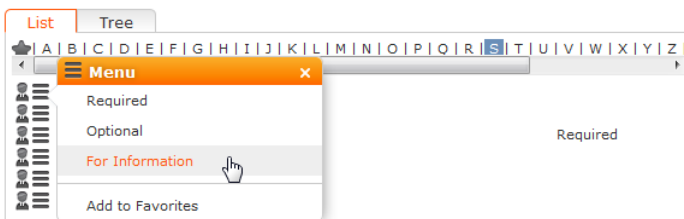
The selected reps are also listed under **Participants** below the record.

2. You can add external participants to an activity under **Participants** below the record. You can choose to add a company, person in company, person, a person linked to the current company or a record in your favorites.

3. Save the appointment.

The selected participants are listed 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.

4. To change the participation type and status, select the options available under **Participation Type** or **Participation Status** in the participant's context menu.

5. Enable the **Create To-Do** check box to determine that all (internal) participants should receive a To-Do, allowing them to accept or decline the invitation to the activity. Upon accepting or declining the invitation, their participation status is updated in the list of participants.

6. Save the record.

Follow-up Activities

To add a follow-up activity for an activity:

1. Select **Follow-up Activity** from the activity's context menu.

2. Enter the details of the follow-up activity.

Note: Your administrator can define which field values are automatically transferred from the previous activity.

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3. Save the record.

The new activity is linked to the previous activity via the **Previous/Main Activity** field.

Recurring Activities

You can add recurring activities that take place at regular intervals.
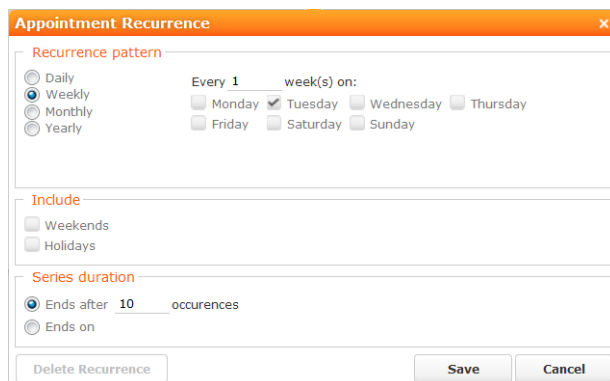
You can determine the frequency (e.g. daily, weekly, monthly or yearly) in the first activity (the main activity), from which you can then generate the remaining appointments.

Adding Recurring Activities

To add a series of recurring activities:

1. Add the first (main) activity.

2. Click on ⟳ (**Recurrence**).

   The **Appointment Recurrence** window is displayed.

3. Specify the recurrence pattern of the activites: **Daily**, **Weekly**, **Monthly** or **Yearly**.

4. Depending on your settings, you can determine when the activity is repeated:

   • **Daily**: The number of days before the activity is repeated.

   • **Weekly**: The number of weeks before the activity is repeated and the day of the week. You can select multiple weekdays.

   • **Monthly**: The number of months before the activity is repeated; the day of the month; the day of the week.

   • **Yearly**: The number of years before the activity is repeated; the day and month; the day of the week.

   When repeating activities on a monthly or yearly basis, enable **Do not create substitute activities** to prevent activities that would fall on a holiday or weekend from being moved to the next work day.

5. Enable the **Weekends** and **Holidays** options if activities should also be added on holidays or weekends.

6. Define the **Series duration**:

- **Ends after**: The number of recurring appointments after which the series ends.
- **Ends on**: Date on which the series should end.

7. Save the data.

   The activities are generated. Recurring activities are indicated using the ⟳ icon.

Note: The following fields are **not** transferred from the main activity to subsequent activities: **Response 1-5 (Marketing Act.)**, **Updated at, Updated on**, **Call Result**, **No. Postponements**, **Added on StNo.**, **Date**, **Result**, **Created on**, **Created at**, **Ext. Calendar**, **Fixed**, **Generated**, **CmCd**, **Costs**, **DelCd**, **Response 1-5**, **Status**, **Create To-Do**, **To-Do Until Date**, **To-Do Until Time**, **Escalate To-Do**, **Survey on**, **MA_1_SerNo**, **MA_1_StaNo**, **Follow-up on**, **Satisfaction**.

Editing Recurring Activities

To edit activities that are part of a series of recurring activities:

1. Edit the first activity in the series that you want to apply changes to.

2. Save the record.

   You will be asked whether you wish to apply your changes to just the one activity or to the remaining activities in the series starting from the current activity.

Note: Fields that are not transferred from the main activity to other activities in the series are not transferred when applying these changes, >> Adding Recurring Activities on page 262.

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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 will be asked what you wish to delete:

- Just this activity
- This activity and all subsequent activities
- The entire series

Note: If you have chosen to delete the main activity, you can only choose to delete the entire series.

2. Choose the desired option and confirm with **OK**.

Editing the Recurrence Pattern

To edit the recurrence pattern of an entire series:

1. Click on ⟳ (**Recurrence**) in the main activity record.

2. Edit the recurrence pattern and click on **Save**.

The activities in the series are deleted and new activities are generated based on the new settings. The main activity is not deleted.

To edit the recurrence pattern for part of a series:

1. Open the activity in the series from which point on you wish to change the recurrence pattern.

2. Click on ⟳ (**Recurrence**).

3. Edit the recurrence pattern and click on **Save**.

A message is displayed informing you that this activity is part of a series of activities, and you are asked if you wish to use the activity as the main activity of a new series.

4. Click on **OK**.

All activities in the series following this activity are deleted and the appointments in the series are generated anew.

Accepting or Refusing Invitations to Recurring Activities

You can only accept or refuse the entire series of appointments. The participants' participation status is stored in the main activity and displayed in the subsequent activities.

Activities and E-mails
Sending E-mails to Participants

To send an e-mail to all participants:

1. Enter the subject of the e-mail in the **Subject** field and the e-mail's text in the **Text** field in the activity.

   Note: Your administrator can determine that buttons are available to format the HTML text, >> HTML Fields on page 55.

2. If configured by your administrator, click on (**Add Signature**) to insert your e-mail signature.

3. Click on ✉ (**Send as E-mail**).

   The reps and external participants are transferred to the e-mail's **To:** and **Cc:** fields based on their participation status (Required, Optional, For Information).

   By default, no e-mail is sent to persons with no e-mail address entered. However, your administrator can determine that an e-mail is sent to the company's e-mail address instead if no e-mail address is entered for a person.

   If your administrator has defined that e-mails are sent locally, your e-mail client is opened. If e-mails are sent via the server, the e-mail is sent directly.

Note: Your administrator can determine that certain file types or files exceeding a certain size are not sent.When sending e-mails from your e-mail client, no attachments can be added.

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 update.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.

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8. Click on **Send** to send the e-mail.
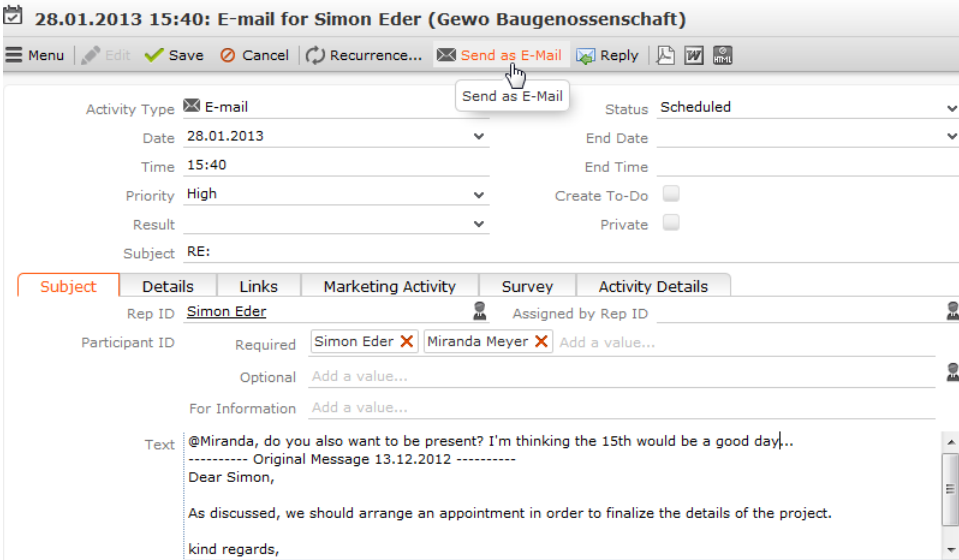
Replying to E-mails

You can reply directly to activities of the type "E-mail":

1. Click on ⬛ (**Reply**).

A follow-up activity is added. "Re:" is added to the start of the **Subject**.

2. Enter the desired text of the e-mail in the **Text** field.

3. If configured by your administrator, click on (**Add Signature**) to insert your e-mail signature.

4. If desired, you can add additional recipients to the **Required**, **Optional** and **For Information** fields.

5. Click on ✉ (**Send as E-mail**).

The e-mail is sent to all reps and companies/persons added as participants.

Tasks

In order to organize complex tasks, you can:

• Add tasks for yourself or for (several) other reps.

• Display tasks as projects, and divide them into sub-projects, >> Task Hierarchy on page 268.

• Select **New > New Reminder** from the context menu to determine that all reps entered in the task should receive a reminder prior to the start of the task (at the reminder's due date and due time).

• Enable the **Create To-Do** check box to determine that all reps entered in the task should receive a To-Do, allowing them to accept or decline the task.

• Enable the **Escalate To-Do** check box to create escalation records if not all required participants have accepted the task by the start of the task.

> **Note:** Tasks can only be escalated if you are using CRM.server.

- Reschedule tasks. The reps entered in the task receive appropriate messages.

Changing the Status of a Task

If you enable the **Create To-Do** field in a task, and the status of the task is "Open", a To-Do is added for all participants entered in the **Required** field. These participants can change the status of the task and To-Do from the task's context menu:

- Select **Complete / Missed** > **Completed** or **Missed** to set the **Status** of your To-Do to "Completed" or "Missed". Once all participants have set the status of their To-Do to "Completed", the **Status** of the task is automatically set to "Completed".

- Select **Accept / Deny** > **Accept** or **Deny** to set your **Participation Status** in the To-Do record to "Accepted" or "Denied".

Task Hierarchy

You can group sub-tasks together in the task hierarchy by assigning a type (sub-project, milestone etc.) and then connecting them according to the structure of your project.

To structure a project with sub-tasks:

1. Select ▦ (**Collaboration**) > **New Task** to add a new task and set its **Type** to "Project".

2. You can add new child tasks (e.g. of the type "Sub-project") on the **Sub-Tasks** tab in the **Related Data** area below the task record, allowing you to define the hierarchy.

3. Save the record and click on ⯈ (**Hierarchy Tree**).

4. You can use the hierarchy tree to navigate between records in the project, add additional records from the context menu and edit sub-tasks.

Absences

To determine that an absence should be approved:

1. Enable the **Create To-Do** check box on the **To-Do** tab.

The rep entered in the **Approve by ID** on the **Details** tab receives a To-Do inform-ing them of the absence. If the appropriate rep then approves the absence, the status is set to "Accepted".

To add a reminder for an absence:

1. Enter values in the **Reminder duration** and **Reminder unit** fields on the **Details** tab.

   For example, if you enter "5 Min", the reminder will be displayed for the rep entered in the absence 5 minutes before the start of the absence.

Work Orders

Use work orders to define customer-related tasks for a specific period of time. For example, you can create work orders for companies and persons that are called or visited regularly and should be given specific information or documents during these activities.

A work order is linked to a company/person, >> Adding a Work Order for a Compa-ny/Person on page 270.

Note: Work orders are not displayed in the calendar.

Work orders can also be generated within the scope of marketing activities, >> Generating Work Orders for Marketing Activities on page 270.

Note: Work orders can be linked to a workflow or trigger in Aurea CRM win. The workflow/trigger can then be executed from the work order's context men, >> Rights in the *CRM.core Administrator Guide*.

Select **Active** from the context menu in the **Work Order** info area in Aurea CRM win to display all currently active work orders for the current company/person (i.e. where the current date is between the **Starts on** and **Ends on** dates). Select **All** to view all work orders for the company. Any conditions you have applied to the **Work Order** info are removed if you select **All** or **Active**.

The **Work Order Overview** info area in Aurea CRM win provides you with an overview of all work orders and related companies/persons. You can edit and delete work orders here. Select **Load Company** or **Load Marketing Activity** from the context menu to switch directly to the associated company or marketing activity.

Adding a Work Order for a Company/Person

To add a work order:

1. Switch to the desired company/person.

2. Select **New** > **New Work Order** from the context menu.

3. Enter the work order's time period (**Starts on** and **Ends on**).

4. Enter additional details on the work order.

5. To assign a work order added manually to a marketing activity, click on

   🔍

   next to the **-> Marketing Activity**) field, select the desired marketing activity and confirm with **OK**.

Generating Work Orders for Marketing Activities

Work orders can also be generated within the scope of marketing activities, >> Defining the Marketing Activity Format on page 433. When adding work orders from marketing activities, enter dates in the **Work Order Start** and **Work Order End** fields in the **Execution (Marketing Activity)** info area.

When generating work orders for a marketing activity, the work orders are linked to the marketing activity and the following fields are transferred to the work order from either the marketing activity or execution record:

- **Marketing Activity**, **Level**, **Variant (Marketing Act.)**
- The **Work Order Start** and **Work Order End** are transferred to the **Starts on** and **Ends on** fields in the work order
- **Work order for group**
- **Priority**
- **Questionnaire**
- **Survey on**
- The following fields are only relevant to Aurea CRM win:**Work order type** (empty, Workflow, Trigger), **Work order Format** (the workflow or trigger format), **Work order document**; these values are transferred to the **Type**, **Format** and **Document 1** fields in the work order.

Daily and Weekly Planning

You can use the daily and weekly planning area to plan your customer visits and add activities.

To add an activity in the daily & weekly planning area:

1. Select (**Collaboration**) > **Daily & Weekly Planning**. Or click on (**Daily & Weekly Planning**) in the calendar.

   The search and calendar are displayed.

2. You can define default values for certain values under **Activity Defaults**. These values are automatically transferred to activities you add in the daily & weekly planning area.

   These default values are only valid as long as you are in the daily & weekly planning area. If you switch to another info area and then reopen the daily & weekly planning area, the default values are reset.

3. To search for companies instead of persons, select **Company** from the drop-down list in the header.

   Note: By default, you can search for companies or persons. Your administrator can define additional search options, >> DayWeekPlanning in the *Aurea CRM web Administrator Guide*.

4. Enter your search criteria and click on **Start Search**.

   The search results are displayed in the results list between the search mask and calendar.

5. Drag the desired company or person to the desired time slot in the calendar to add an activity. Note that you there is no visual feedback until you drag the person/company over the calendar.

   If contact times have been defined for the company or person (>> Contact Times), these times are colored white in the calendar.

   The activity is added with the activity default values your have defined (the default duration is one hour).

   You can select multiple entries in the search results (by holding Ctrl while clicking) and drag these to the calendar. The appointments are added one after another (in the order in which you clicked on the records).
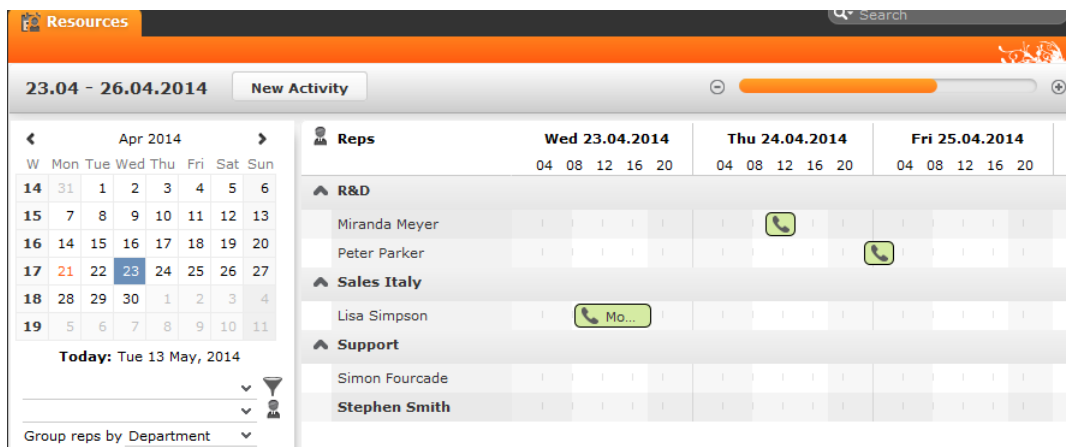
6. The other functions in the daily & weekly planning area (e.g. filters, switching views) function the same as in the calendar, >> Calendar on page 252.

7. Click on 🗓 (**Calendar**) to switch to the calendar.

Resources

The resource view allows you to view the workload of reps. This makes planning activities (especially internal meetings) much easier. Reps' absences (holidays and sick leave) are also displayed here.

To open the resource view:

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

The current date and time is indicated by a vertical line. Holidays are color-coded.

If a rep's working hours have been defined, this time is color-coded. The time when no work hours have been defined (including weekends) is colored gray.

You can customize the resource view, >> Customizing the Resource View on page 273.

You can edit the displayed activities and absences and add new ones, >> Editing Activities and Absences on page 275.

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:
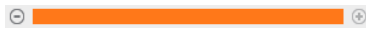
    - Click on the header and drag it left or right to scroll:

- Select filters from the drop-down lists in the sidebar to determine which reps/appointments are displayed. You can define your own filters, >> Filtering Appointments on page 257.

    Note: At most 50 reps and 5,000 activities can be displayed. If your filters return more reps or activities, a message is displayed informing you that not all records can be displayed. Either refine your filter criteria or display a shorter time period.

- Select one or more reps displayed in the view (hold down Ctrl) and select **Remove Rep** from the context menu to remove the rep(s) from the view.
- You can select additional criteria used to group reps from the **Group reps by** drop-down list, e.g. **Department** (**Org. Group ID** field in the rep record), **Country** or **Skill** or **No grouping**.

    Note: Reps of the type "Resource" are displayed within a group at the end of the group's entries.

- Click in the **Reps** column in the header to sort the reps displayed in the resource view.

- Click on ⚙ (**Edit Settings**):

  - Select the **Color Coding** criteria used to color activities. Click on ❓ (**Legend**) to display an overview of the color-coding in the calendar.

  - Determine whether you wish to **Show working hours only**.

  - Enable the **Show group column** option to display reps' groups in a separate column.

  - Enable the **Show hidden items** option to include those appointments whose duration is less than the minimum duration for the selected view. These appointments are only displayed for reference and cannot be edited in the resource view.

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

Editing Activities and Absences

You can edit the activities and absences displayed as follows:

- Use the mouse to move activities or absences to a different time.

- Drag the left or right borders of an appointment to change its duration.

- Activities are displayed with a solid frame in the row of the organizer (rep): 📞 You can drag these activities to another rep using the mouse.

  Note: You cannot assign an absence to another rep.

- To delete an appointment, click on the appointment to select it and press Delete on your keyboard.

- Double-click on an appointment to open and edit it.

- Click on **New Activity** to add an activity for yourself, another rep at your company or any participants you wish.

  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. You cannot however add absences for multiple reps.

Visit Planning

You can schedule customer visits for yourself or other reps in Aurea CRM web, helping you optimize your working week.

You can generate automatic suggestions for routes, edit the suggested route and then automatically generate activities for the stops on your route. When generating a route, the system takes into account your work hours and the location (geo-coordinates) and contact times of your customers. Existing appointments, absences, public holidays (defined in the calendar), visit durations (default: 60 minutes), breaks between visits (default: 15 minutes) are all taken into account. You can also take other criteria such as open work orders, the customer's ABC classification, the ratio of actual visits to target visits etc. into account when planning routes.

You can also plan routes manually without suggestions by adding customers to a route. Routes you have planned manually can be optimized by Aurea CRM web.

Routes can be planned for a single day or over several days. Only the stops on the route on the day selected in the calendar are displayed. If you edit a route (e.g. add customers or activities), the route is recalculated automatically.

Note: Your administrator needs to define geo-coordinates for reps, customers etc. and reps' work hours and customers' contact times are only taken into account if they are stored in Aurea CRM web. If no contact times have been entered for a customer, activities are generated during the rep's work hours.Saturdays and Sundays are ignored when planning routes unless work hours have been defined on these days for the specific rep.If no individual work hours have been entered for the rep, the work hours are determined by the Calendar.DayStartsAt and Calendar.DayEndsAt web configuration parameters.Your administrator needs to define two queries (Candidates and Planned) in CRM.designer. Your administrator can use variables (Z5) to define values used to suggest visits, e.g. the duration of visits (default: 60 minutes), the length of the break between visits (default: 15 minutes) etc., >> VisitPlanning in the *Aurea CRM web Administrator Guide*.Your

administrator can also define which activities (status, type) are displayed on the timeline.

Select (**Collaboration**) > **Visit Planning** or select **Visit Planning** from a company or person's context menu to open the visit planning area.

Note: If you open the visit planning area from a company/person, only that customer's activities are displayed on suggestions are only made for that customer.When opening the visit planning area, only those activities and suggestions are displayed for the date selected in the calendar. If more than one activity and/or suggestion exists, the corresponding route is displayed when opening the area.

The visit planning area is divided into several areas:
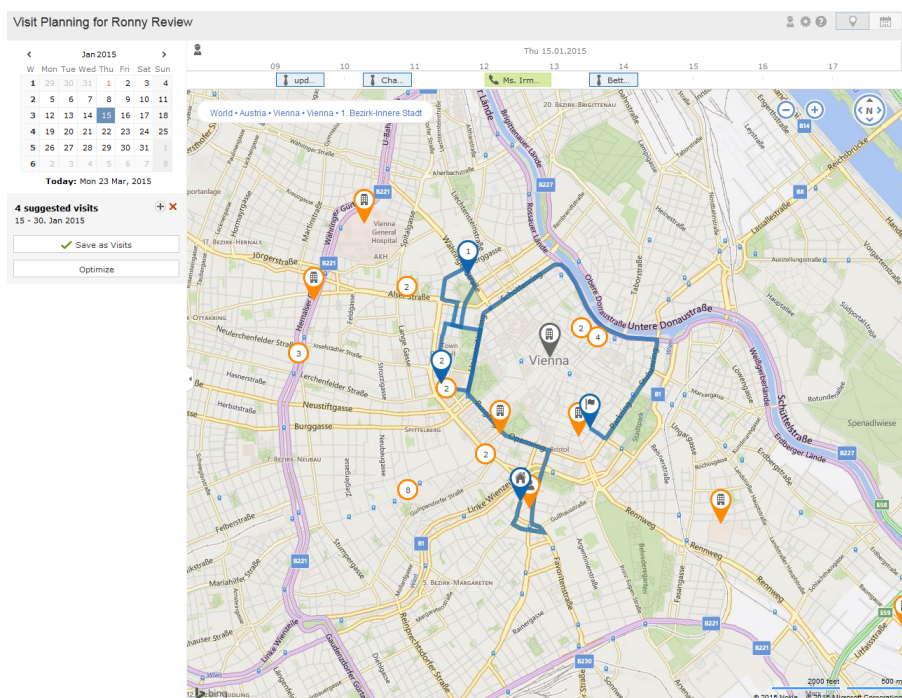
Map

• The location of your customers on the map are color-coded:

  • Orange: The location of your customers (companies and persons).

  • Orange circle with number (): Indicates several companies are display at a single location as there is not enough room to display them all on the map. The number indicates the number of companies at the location. Zoom in to display the customers' individual locations.

  Click on the orange circle to display a list of all customers at that location.

- Blue (, ,): Visits that are part of the route (either existing appointments in your calendar or suggestions). The number indicates the order in which customers are visited. The house icon indicates the start of the route and the flag the end.

  Activities and suggestions are only displayed for the date selected in the calendar.

- Violet ( ): Customers originally suggested in the route, but that you have manually removed from the route.

- Gray ( ): 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.

When planning a route for another rep, variable values defined in the corresponding info areas (Z5/Z6) are applied to the current rep, not the rep the route is planned for.

If you apply a filter (⚙ (**Settings**) in the header), the filter is taken into account when generating visit suggestions.

If you add or reschedule an activity outside of the rep's work hours, the rep's work hours for that day are extended accordingly.

Routes can span 31 days at most.

• Click on **Optimize** to optimize the route if you have edited it or added the route manually. The route is recalculated. The order of visits in the route may change. Existing activities and the starting location are not changed.

Note: Calculating the route may take a while. A message is displayed if the route is already optimized or cannot be optimized further.

• Once you are satisfied with the route, click on **Save as Visits**. Activities are automatically generated (type = "Visit") based on the suggestions in the route.

If you are planning a route over several days, you can choose whether to generate activities for all the suggestions or only for a specific day.

- Click on ✕ (**Discard all Suggestions**) in the sidebar next to the number of suggested visits. **All** visit suggestions are deleted (not just those on the current day).

- Click on a location on the map or on an activity/suggestion in the timeline to display information on the record in the sidebar.

  Move your mouse cursor over the record's header (e.g. the name of the customer) to display the icons used to access the menu (≡) and quick view (⬚). Select **Remove from Route** from the menu to remove the customer from the route.
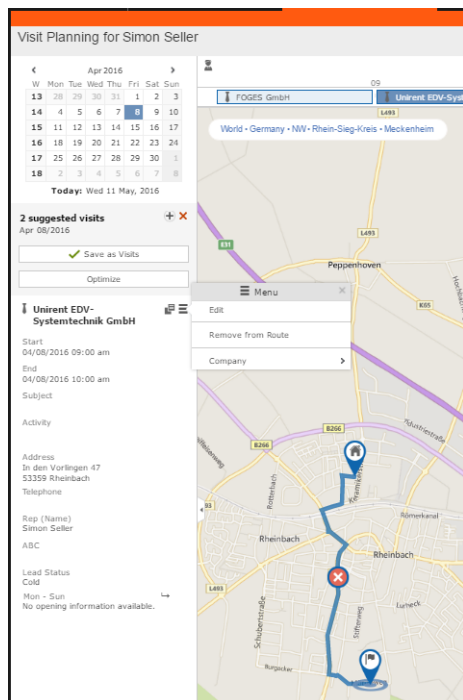
Timeline

- A timeline is displayed above the map containing suggestions that are currently part of the route (blue) or not part of the route (violet). Existing activities and absences are colored the same as they are in the calendar.

- Visit suggestions are indicated by the ⬦ icon in both the timeline and sidebar. Existing activities and absences are indicated using the same icon as in the calendar (e.g. ⬦ for a visit).

- Click on an activity or visit suggestion to highlight the customer on the map with a circle beneath the pin (⬤).

- You can reschedule activities and suggestions by dragging them to the desired time in the timeline. Drag the left or right borders to change the start and end time (and the duration).

- Double-click on an activity or visit suggestion to open a popup where you can edit its details.

Header

- The rep the route is being planned for is displayed in the header. By default, routes are created for you.

  Click on 🤵 (**Select Rep**) to select a different rep. The selected user is stored and selected by default the next time you open the visit planning area.

- Click on ⬜ (**Map**) and 📅 (**Calendar**) to switch between the map and calendar view of activities and suggestions. You can edit activities in the calendar view, e.g. move an appointment to reschedule it.

- Click on ❷ (**Legend**) to display the legend.

- Select ⚙ (**Settings**) > ▽ (**Filter**) to determine which customers are displayed on the map (e.g. companies, persons) and define filters, >> Defining General Filters on page 257. 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.

4

Surveys

You can define questionnaires, e.g. for telephone marketing campaigns. 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, >> Defining Marketing Activities on page 428.

Defining Questionnaires

To define a questionnaire:

1. Select ![icon] (**Collaboration**) > **Questionnaire**.

2. Click on **Start Search** and then on ⊕ **New**.

3. Click on **+** (**Add/Find Catalog Values**) next to the **Questionnaire** field.

    The **Find or Add Catalog Value** window opens.

4. Enter a name for the questionnaire.

5. Click on **New**.

6. Save.

7. Define the questions and answers used by the questionnaire, >> Defining Questions on page 283 and Defining Answers on page 285.

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: If you do not enter a number, the questions are displayed in the order they were added when filling out the questionnaire. Aurea recommends always assigning a question number.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 (>>

Defining Answers on page 285), 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, >> Defining Answers on page 285.

- 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.

- The default answer is the current value entered in a field of the current company or person, which can either be accepted or updated: 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.

- You can add a new record based on the answers received. 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 **Answer** in the questionnaire's tree view and click on **New**.
2. Enter the **Answer No.** and **Answer**.
3. You can define **Points** that are awarded for this answer.
4. To define that this answer should be followed by a specific question, enter the question's number in the **Follow-up question** field.

   Follow-up questions allow you to define branches in the questionnaire, i.e. to ask different questions based on the answers you have received.

   > **Note:** The follow-up question's number must be higher than the current question's number.Follow-up questions are not available for questions where the **Multiple Answers** option is enabled (if a follow-up question is defined, it is ignored).

> **Note:** If a questionnaire contains branches, ensure that a follow-up question is defined for each question or answer, and that the **Last Question** check box is enabled for the last question. If no follow-up question is defined and the **Last Question** check box is not enabled, the question with the next highest number is automatically used as the next question.

Carrying Out a Survey

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.
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

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.
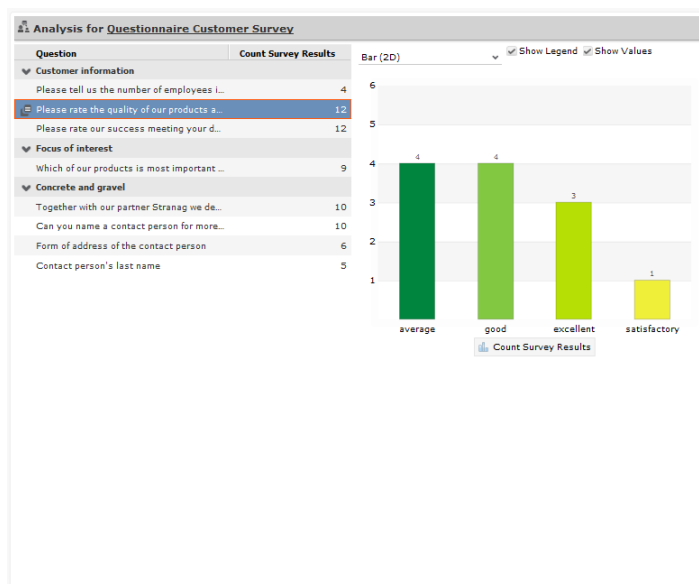
- The answers given to individual questions are displayed on the right (selected answers graphically, answers entered as text in a list).

- By default, answers that none of the participants gave are also displayed.

Displaying the Questionnaires Answered by a Person

To display the questionnaires that a person has answered:

1. Select **Go to All Related** > **All Surveys** from the person's context menu.

All surveys carried out for this person are displayed.

The **Result (%)**, **Max. Points** and **Points Attained** columns are calculated from the answers given by the person (taking into account the weighting).

2. Click on a survey in the list of results to display the answers the person gave.

5

Document Management

You can store existing documents in Aurea CRM Web database. For example, a letter that you received from a customer. You can create separate letters to your customers using template documents that can populate the letter with data from the CRM database. You can also generate mass mailings within the scope of marketing activities and automatically populate the e-mail with data related to the target group created for the marketing activity. All the documents created are stored in the database.

Note: To send an e-mail in a language other than the default languages, you should use UTF-16 encoding for the template document. For example, to send an e-mail in Cyrillic, encode the template document in UTF-16. You can use any text editor that supports UTF-16, to encode the template document.

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 ▦ (**Collaboration**) > **Documents** and start the search.
- Open a record (e.g. an offer) and switch to the **Document Links** tab.

2. Click on the document to open it.

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 208.

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 types of documents (e.g. Microsoft Office documents) can be saved and uploaded automatically. To save the document in the Aurea CRM database, save or close the document in the associated application.

   You will be 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.

   If the document type cannot be saved automatically, a message is displayed. To upload the document:

   a. Save the document in the associated application.

   b. Click on ▦ (**Checked Out Documents**) in Aurea CRM web. This icon is visible whenever a document has been checked out.

   c. Select the desired document.

   d. Click on **Upload**.

Displaying Checked Out Documents

To display the documents you have checked out:

1. Select ▦ (**Collaboration**) > **Checked Out Documents**.

The documents that you have checked out are listed.

2. The following entries are available from the document's context menu:

- **View Document Record** displays the document record.

- Select **Undo Check Out**.

3. To check in the document, select ▣ (**Collaboration**) > **Checked Out Documents**, select **View Document Record** from the document's context menu and click on 🔍 (**Select / Upload Document**) next to the **Document Key** field and upload the document.

If you log out of Aurea CRM web and you have checked out documents, you will be asked whether you want to:

- Cancel logging out in order to upload the document

- Upload the document the next time you use the system. The document remains checked out.

- Undo the check out before logging off.

Saving Documents in the Database

Note: If your administrator has determined that you can upload multiple documents at once (>> Configuration Settings > Documents in the *CRM.core Administrator Guide*), you can select multiple documents of various types or drag them from your local file system to Aurea CRM.

The following options are available for uploading documents to the database:

Uploading a (Local) Document to the Aurea CRM database

1. You can choose to upload a general document, or upload the document to a specific record:

- Select ▣ (**Collaboration**) > **Documents**, start the search and click on ⊕ (**New**).

- Open the record (e.g. an offer) and switch to the **Document Links** tab under **Related Data**. Click on ≡ (**New**) and select **Upload new document**.

2. Click on **Select File** in the **Upload Document** window and select the desired document(s).

You can also drag the document(s) to the window using your mouse.
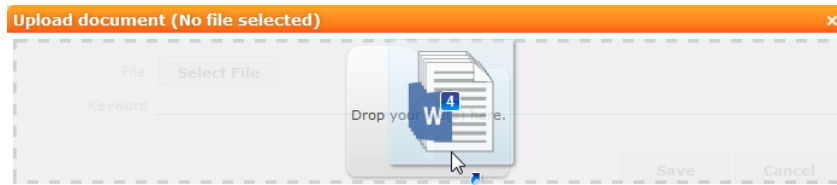
3. Save.

   The record is displayed in tab view or in the list.

Linking an Aurea CRM Document with a Record

1. Open the record (e.g. an offer) and switch to the **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. Select 📅 (**Collaboration**) > **Documents** or switch to the **Document Links** tab under **Related Data** in the corresponding record.

2. Search for the document you wish to replace.

3. Select **Tab View** from the context menu.

4. Click on 🔍 (**Select / Upload Document**) next to the **Document Key** field.

5. Select **Upload Document**.

6. Click on **Browse** and select the desired document.

7. Save the record.

Deleting Documents

To delete a document:

1. Search 📅 (**Collaboration**) > **Documents** or switch to the **Document Links** tab under **Related Data** in the corresponding record.

2. Search for the document you want to delete.

3. 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.

4. Choose whether to delete the record.

You can also choose to delete a document from a record to which the document is linked:

1. Switch to the parent record (e.g. a company) and switch to the **Document Links** 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.

   • **Existing Customer Document**: Allows you to enter a customer 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.

   Note: Your administrator can determine that uploaded images are displayed in the record's mask.

3. Click on (**Delete**) to remove the current document from the field.

Note: If your administrator has defined that a document field is displayed in a list, the document key is displayed instead of the document name.

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 merged with the document.

Document templates for letters including the desired transfer fields and label formats are created in Aurea CRM win and can then be accessed in Aurea CRM web, >> Word Processor in the *Aurea CRM win User Guide*.

Your administrator can define the following options in the transfer format used to create the letter:

- Whether the letter is read-only. In this case you cannot edit the letter; it can only be viewed.

- Whether the letter is generated in the background, stored in the database and linked to the customer record using a document link.

- How the document is named. Your administrator can use the available variables to generate the name of the letter.

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 company, for example:

1. Select the desired template from the company'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 displayed 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

Quick campaigns allow you to generate a letter for several persons, without needing to first add a campaign and associated marketing activities etc., >> Quick Campaigns on page 420.

You can also create mail merges within the scope of marketing activities. You cannot however create mass mailings in Aurea CRM web itself, but only the control file containing the customer data that is then merged with your text in Microsoft Word, >> Defining How the Activity is Executed on page 431.

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 mailing:

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 opened in Microsoft Word.

Document Templates

Using Aurea CRM Addin for Microsoft Word

Aurea CRM addin for Microsoft Word allows CRM users to create documents based on templates that meet the corporate customer interaction (CI) guidelines and enrich the documents with content from the CRM.

CRM administrator and users can create template documents that can be used for various recurring tasks. Some of the tasks for different user roles include the following:

- A Sales representative could create and maintain template documents for offer letters, order sheets, e-mail etc. Use the different information in the CRM system to enrich the document.

- Marketing personnel could create new templates to meet the latest customer interaction guidelines. Create templates for marketing campaigns sent by letters or flyers using information from the CRM.

- Service representatives can create solution documents or other documents for different services and use the CRM information in those documents.

- Field service representatives can create service report documents at the customer site along with the current ticket.

- All users can ensure that customers receive information in their preferred language.

Note: To send email in a language other than the default languages, you should use UTF-16 encoding for the template documents. For example, to send a mail in Cyrillic, encode the HTML template document in UTF-16.

The Aurea CRM word addin supports the following features:

- Allows you to use the same set of methods used by Aurea CRM web.

- Template documents can use fields that are used to store information in Aurea CRM.

- You can generate the documents on CRM.pad using the same templates from Aurea CRM.

- Serial and single letter fields can be easily integrated into the templates using drag and drop features.

- You can create template documents in multiple languages.

- You can create formatted text, when merging documents and mail merge.

- Allows you to embed additional information in the documents like images and pictograms.

Installing Aurea CRM Add-in for Microsoft Word

The recommended way to install Aurea CRM Word Add-in is to use a network shared location containing the latest installation package. Ask your CRM administrator for the central shared location for the CRM Add-in for Word installation package. Using this process will ensure that the latest version of the CRM Add-in for Word is automatically upgraded to the latest version. You only have to install it once using the shared central location.

If your organization does not provide a shared location, the Aurea CRM add-in for Word installation package can be found on the Aurea CRM customer support site.

To install the Aurea CRM add-in for Word:

1. Browse to the network shared central location provided by your CRM administrator.

   Or

   Unzip the package `OfficeAddins_<versionNo>_full.zip`. The `<versionNo>` will be the latest version available on the customer support site.

2. Double click `aurea.office.word.vsto` file in the shared location or the unzipped folder. The Microsoft Office Customization Installer window opens.

   The installer verifies the publisher, in this case Aurea CRM, and then displays the following window.

3. Click **Install**. The Installing Office Customization message displays.

4. The window automatically closes on successful installation.

5. Start Microsoft Word and open a blank document, the **Aurea CRM** menu item should be visible.

6. Click the **Aurea CRM** menu.
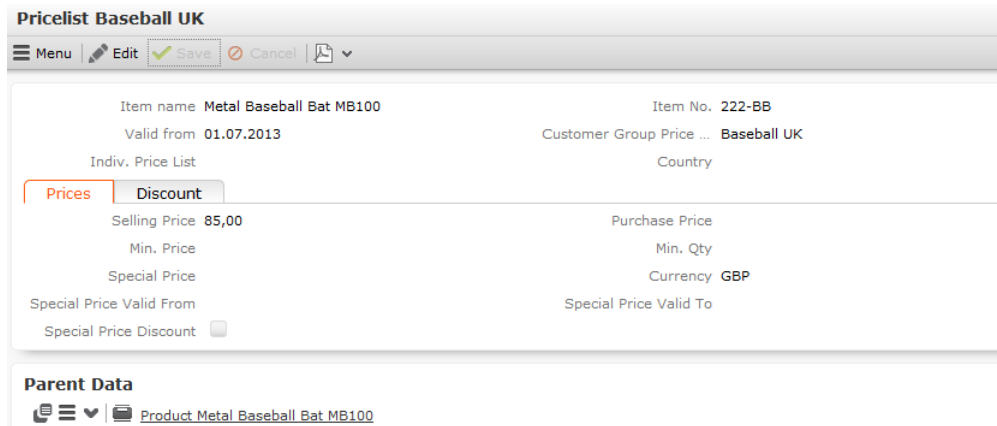
7. To work with the plugin you have to be connected to Aurea CRM. Click **Settings** to open the connection dialog.
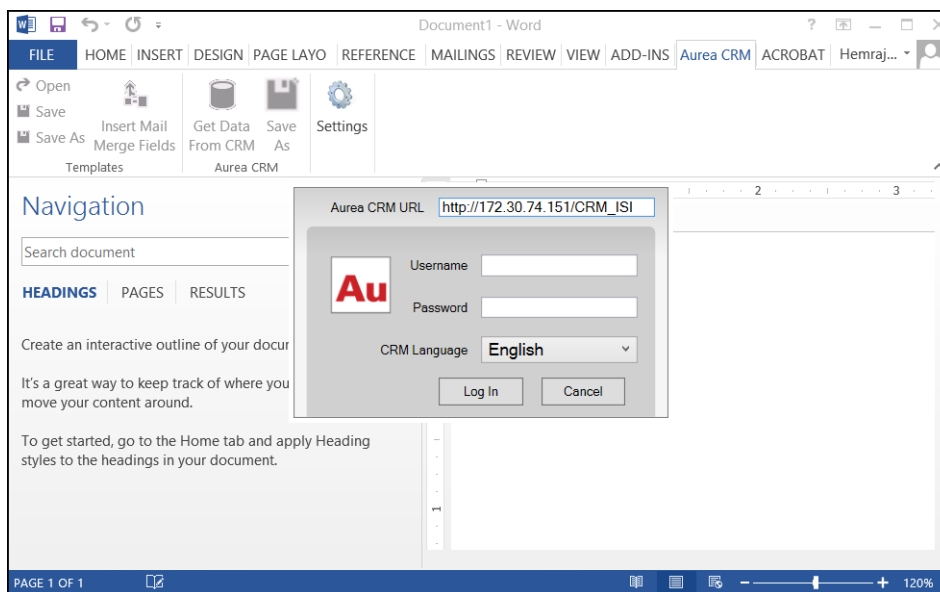
8. Enter the following details in the connection dialog:

   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.
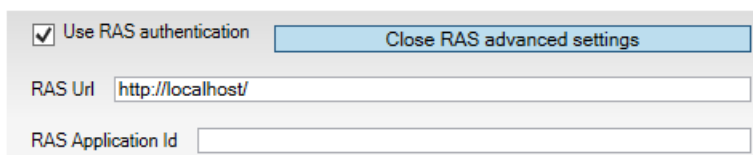
      c. Enter the URL for the RAS server and the Application ID of Aurea CRM web instance on the RAS server.

      d. Click **Close RAS advanced settings**.

    c. Select the language you prefer to work on Aurea CRM.

9. Click **Log In**.

10. Now you can use the CRM Word Add-in to create templates for your documents.

Upgrading the Aurea CRM Add-in for Microsoft Word

Aurea CRM Add-in for MS Word is developed as a VSTO Add-in. Visual Studio Tools for Office (VSTO) Add-ins use the ClickOnce deployment solution which automatically updates your installation of CRM Add-in for Word. This requires your administrator to publish Aurea CRM Add-in to a network shared central location. You can install the latest version from this location once, all subsequent upgrades will then happen automatically. Publishing a new version to this location will automatically update the CRM Add-in for Word installed from this location. ClickOnce will check this location once in every seven days for new updates.

Note: If there are multiple users on your machine, then you have to install your own version of CRM Word Add-in. This is a limitation of the ClickOnce solution.

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.
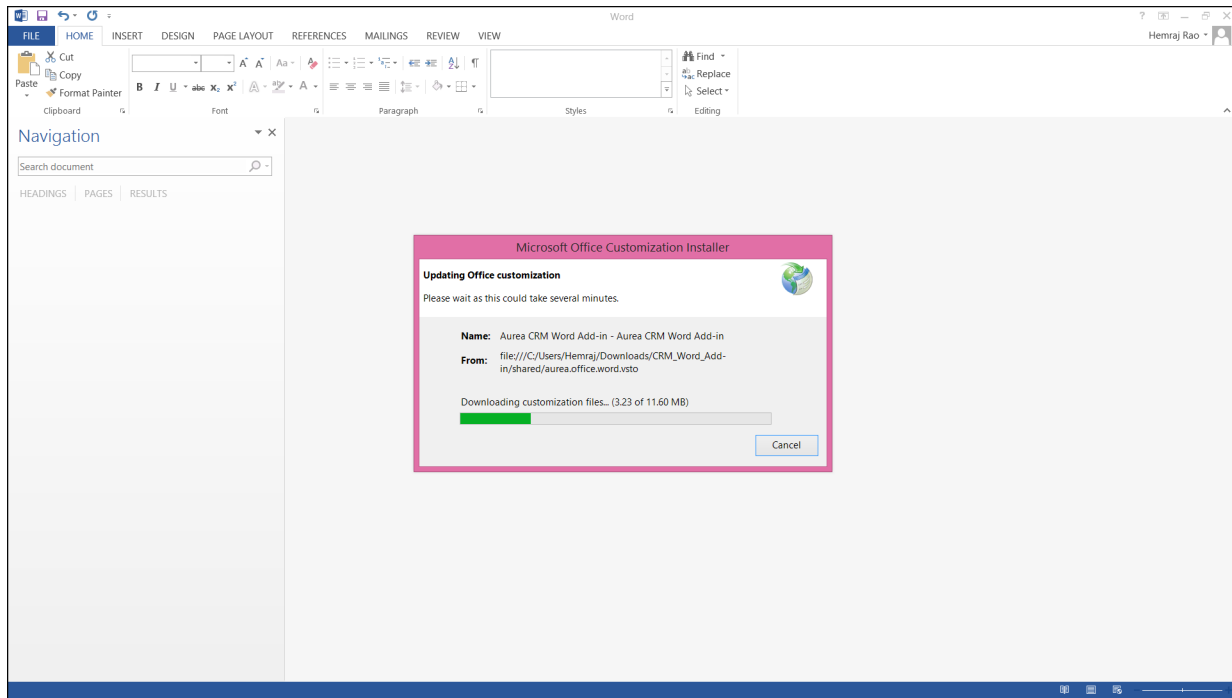
If you have installed the word plugin using the installer package from the support site, then you have to uninstall the existing Aurea CRM Word Add-in from **Control Panel > Programs > Programs and Features**.
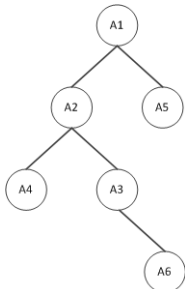
Unzip the package `OfficeAddins_<version no>_release.zip`. The `<version no>` will be the latest version available on the customer support site. Follow the installation instructions in Installing Aurea CRM Add-in for Microsoft Word.

Creating and Saving new Document Template

You can create document templates for documents that you regularly use for recurring tasks.

Note: To send an e-mail in a language other than the default languages, you should use UTF-16 encoding for the template document. For example, to send an e-mail in Cyrillic, encode the template document in UTF-16.

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.
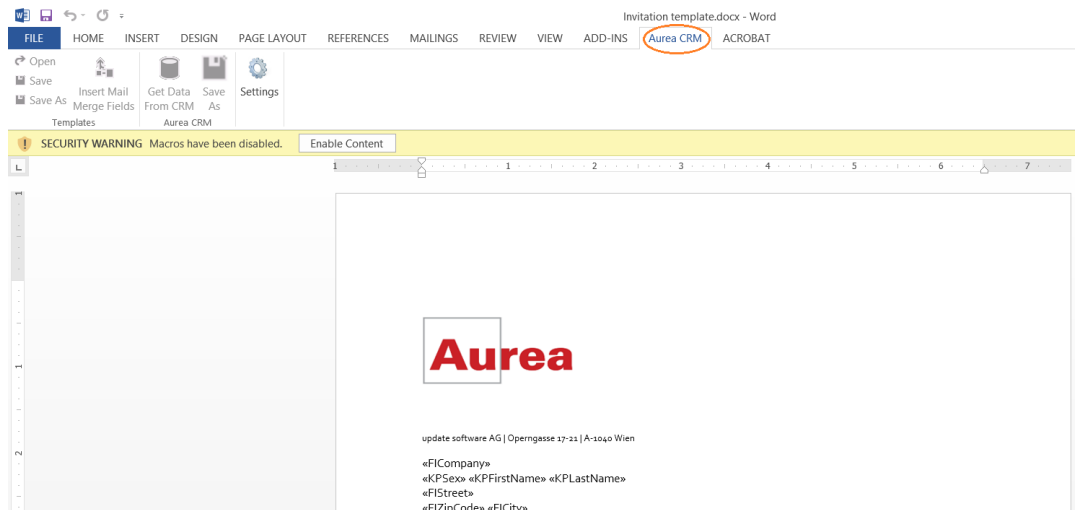
4. Click **Settings** to open the connection dialog.
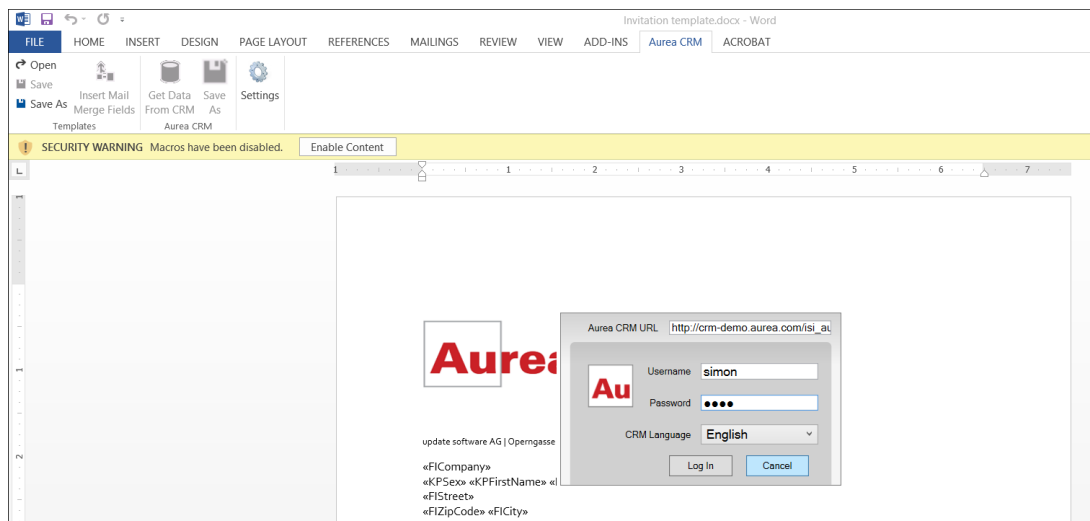
5. Enter the following details in the connection dialog:

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)**
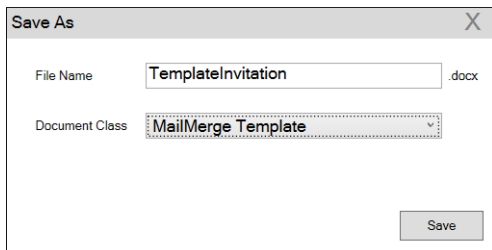
In this case, we save the template document as a **MailMerge Template** class.

> **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:
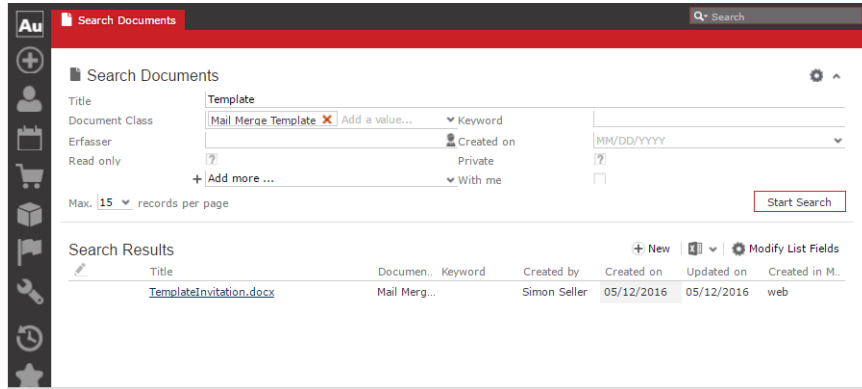
9. Click **Insert Mail Merge Fields**, to update the document with information from the records on Aurea CRM server. The **Mail Merge Fields** column displays.
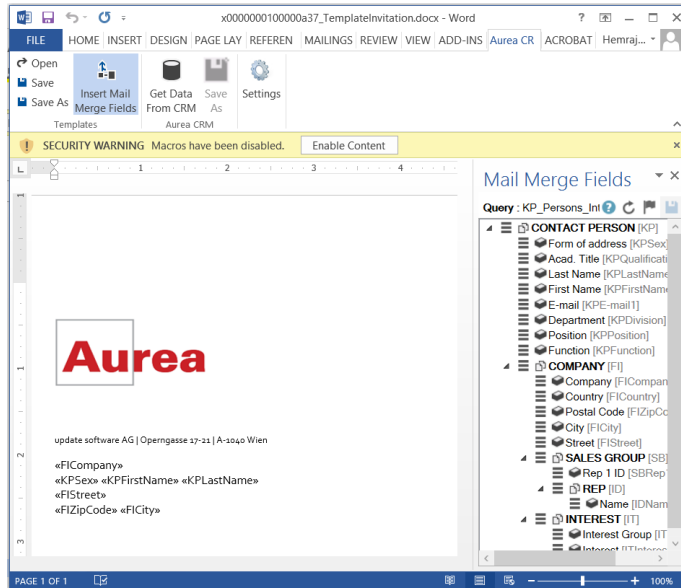
10. Click **Queries(⚑)** to list existing queries.
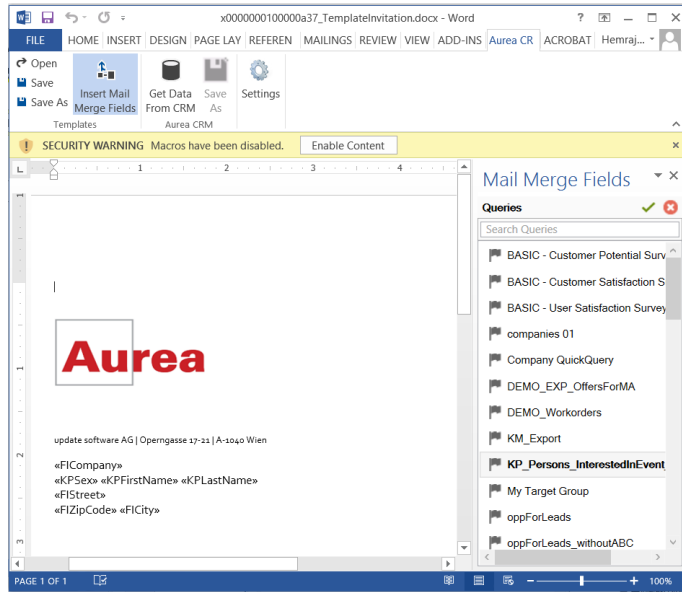
11. You can create a new query by selecting an existing query then modifying, and saving it.

   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**.
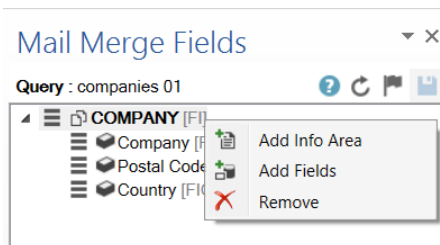
   This will create a blank query, as shown in the screenshot below.
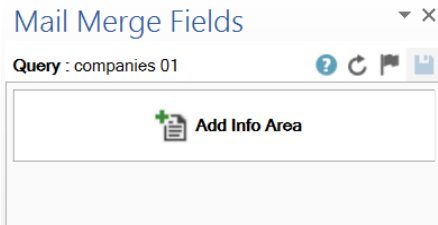
c. Click **Add Info Area**. The **Select info Area** dialog displays.
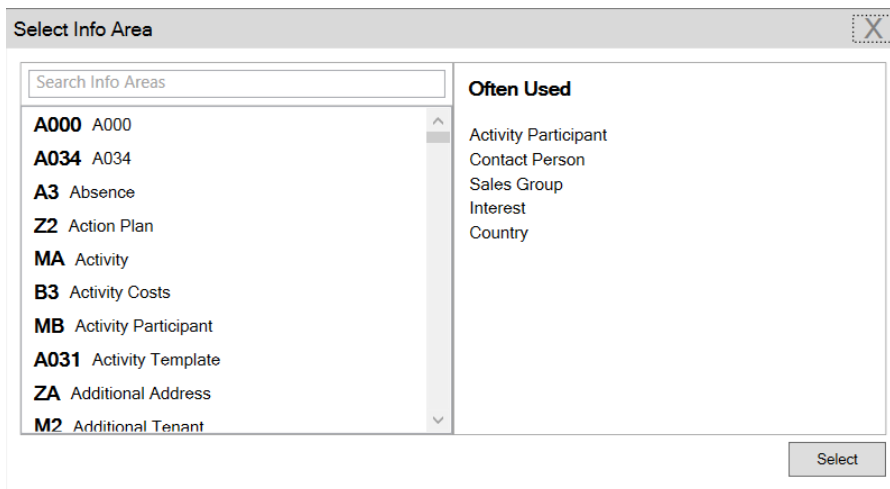
d. Select the infoarea of interest and select the required fields from that info area. For this example, type KP and select the **Contact Person** info area. The **Select Field(s) in Info Area: Contact Person** dialog box opens.
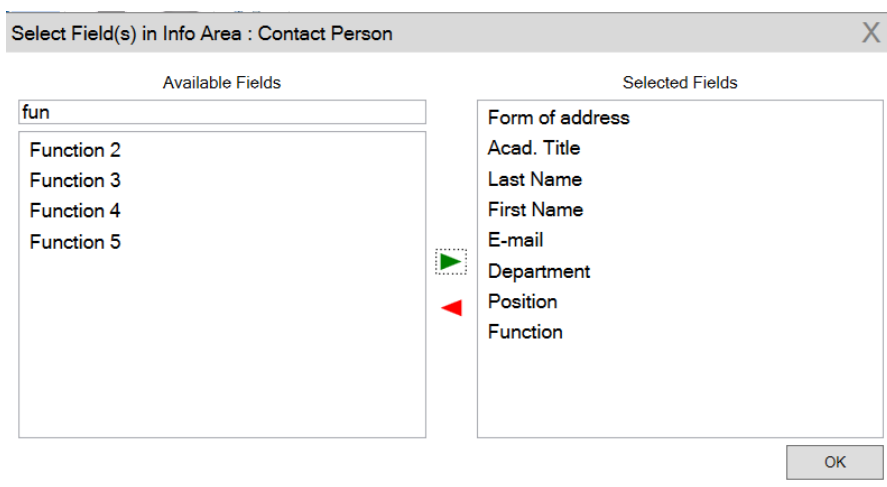
e. Select the required fields in the **Available Fields pane and click ▶ to move it to the Selected Fields pane**. Click **OK**. The selected infoarea and fields are displayed in the Mail Merge Fields.
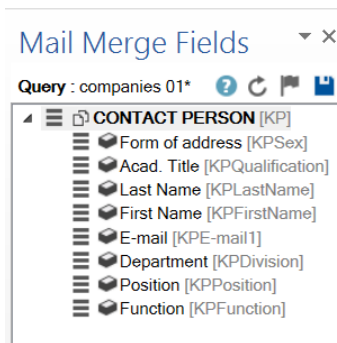
f. To add more info areas, right click on an infoarea and select **Add Info area**. Selecting the infoarea opens a Relationships dialog. You can define the type of relationship between the existing infoarea and the new one you add.
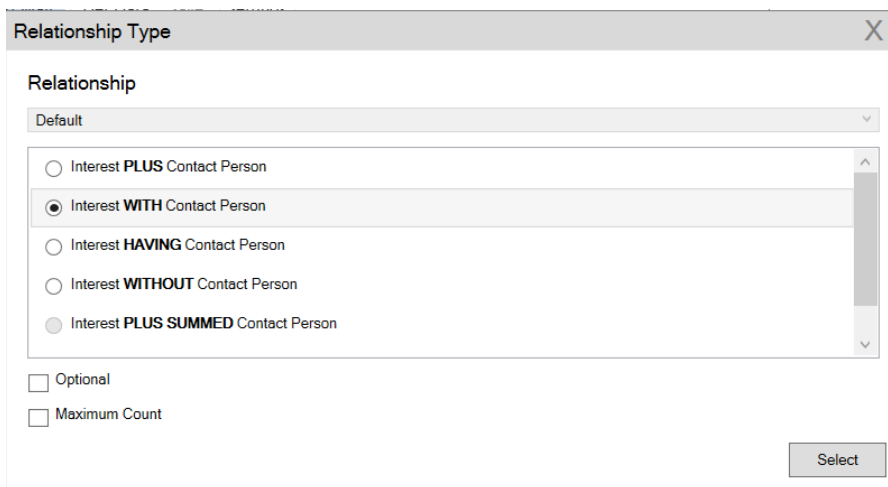
g. Select the required fields from for the new infoarea. The following screenshot shows the **Mail Merge Fields** with the selected info areas and parameters.
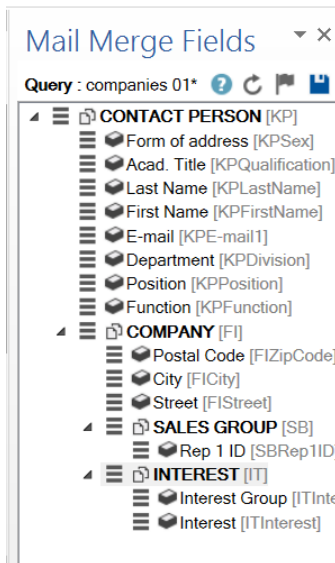
h. Click ![save icon] to save the modified query.

Note: This will overwrite the before selected query and the changes will be done in the CRM solution. Please ensure that the query can be modified to your requirements to avoid conflicts with queries set up by other users.

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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.
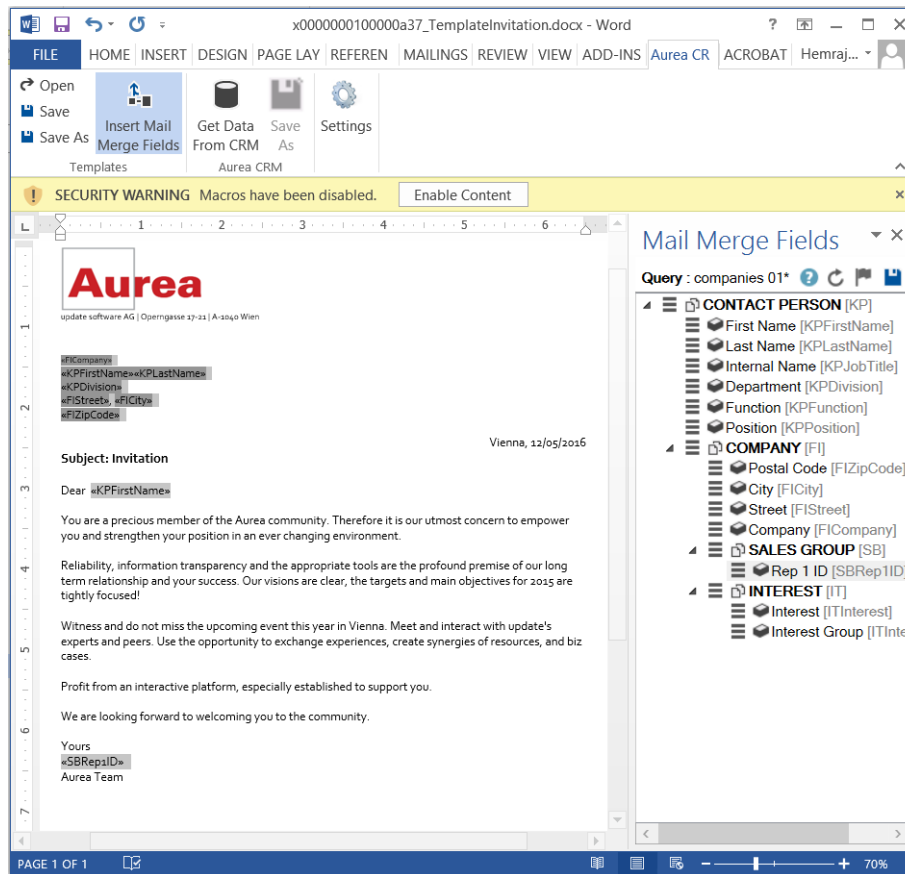
13. Click **Save**. The template document will be saved to the D1 infoarea on Aurea CRM server.

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.
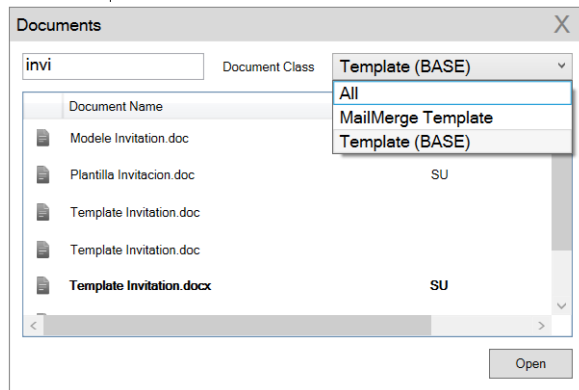
You can type in the text box to filter for a specific document. You can also select the name of the template document. In the screenshot above, **Template (BASE)** is the document class and **invi** is typed in the filter text box, to find the **Template Invitation.docx** template.

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**.
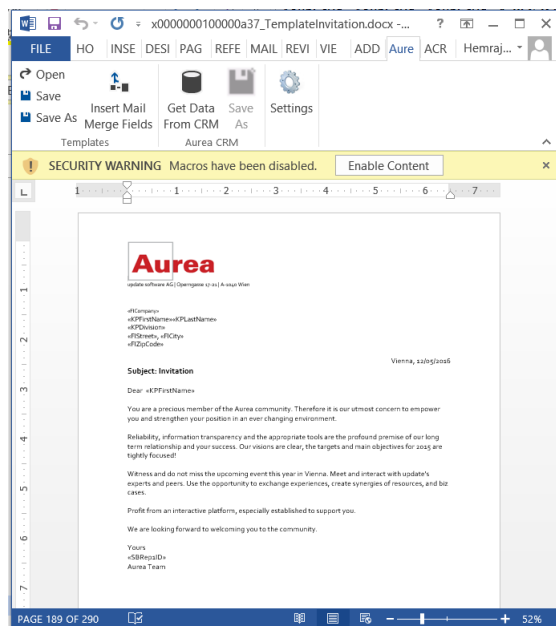
5. You can edit the template document and make modifications. For example, in the Invitation template.docx, you might want to add the country name, after the City name.

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.
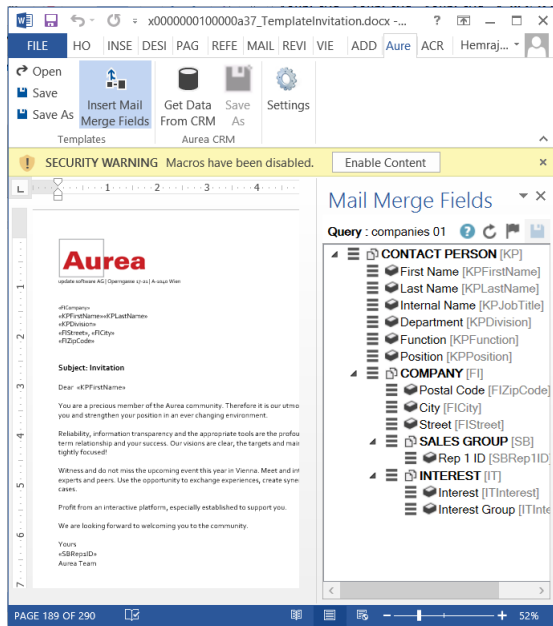
7. To add a field from the infoarea to the template document, select the field and drag and drop it in the document at the appropriate position. For example, the Country field was selected and added to the document. See the screenshot below.
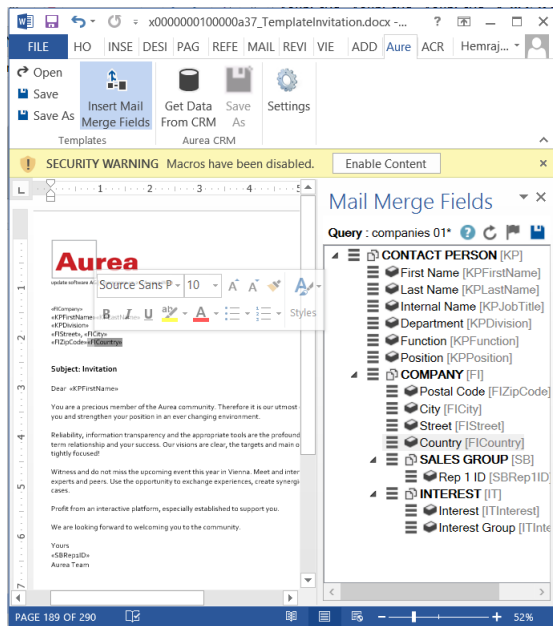
8. Click **Save**. The template document is saved to the D1 area of Aurea CRM.

   Alternatively, you can use **Save As** to save the template document with a new name.

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.
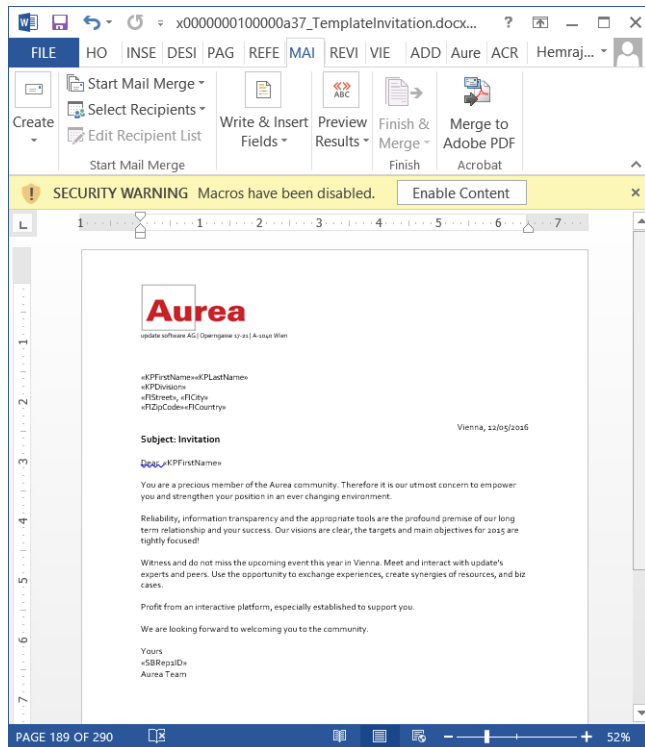
4. To see the individual documents populated with the field values, select the required recipient from the **Preview Results** menu. The document is populated with the required information. The following screenshot shows the merged fields with their values populated and highlighted.
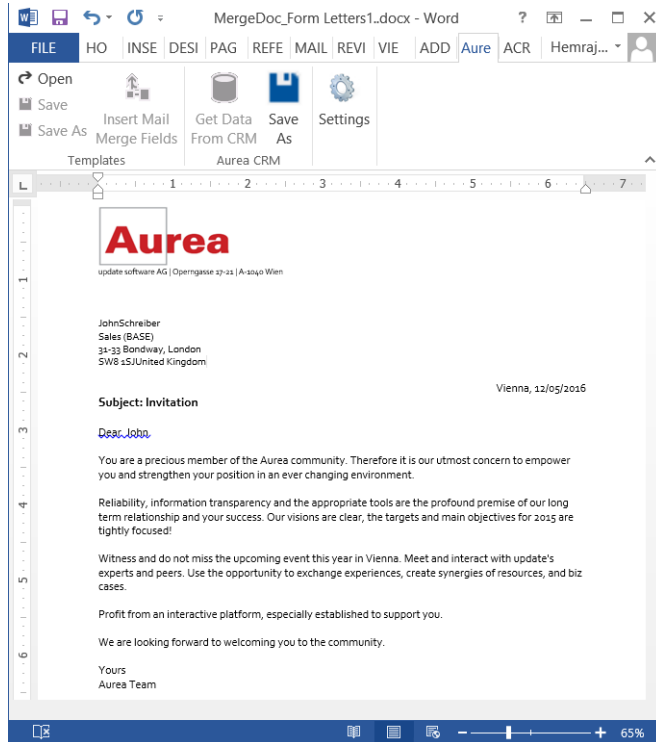
5. You can work with the documents created from the Aurea CRM server. The following screenshot shows the **Invitation template.docx** template document on the CRM server.
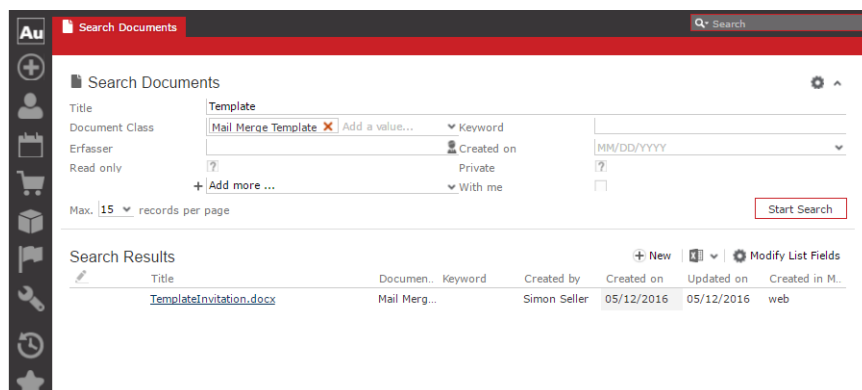
Deleting a Template Document

You can delete a template document from the CRM server. This will delete 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.
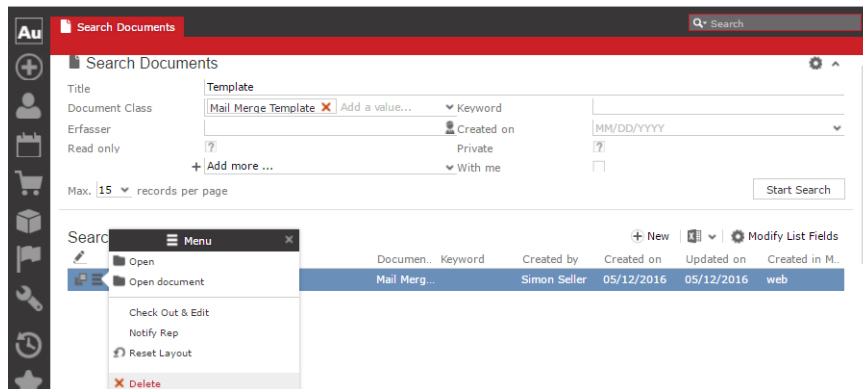
Working with Images in the Template Document

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 new Document Template on page 300. 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.
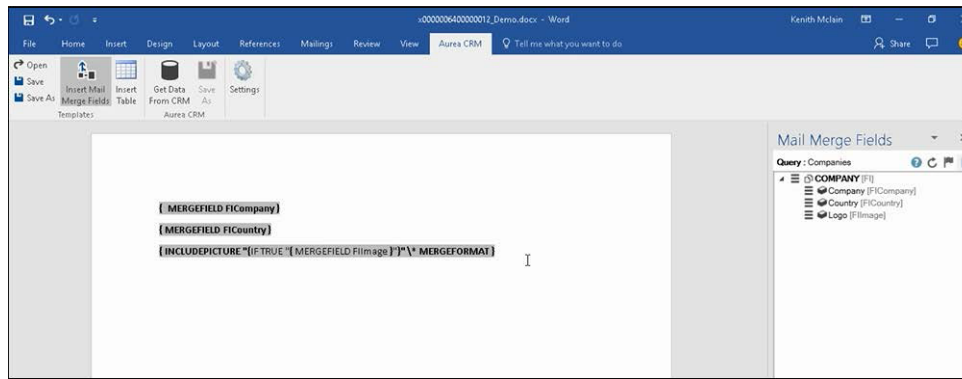
3. Format the fields to the desired fonts, bold it and other changes you desire, as you would a normal a normal word document.

4. Click to execute the mail merge. This will fetch the data, populate the record field and create the pages for each record set in the CRM database. The screenshot below shows one of the pages generated.
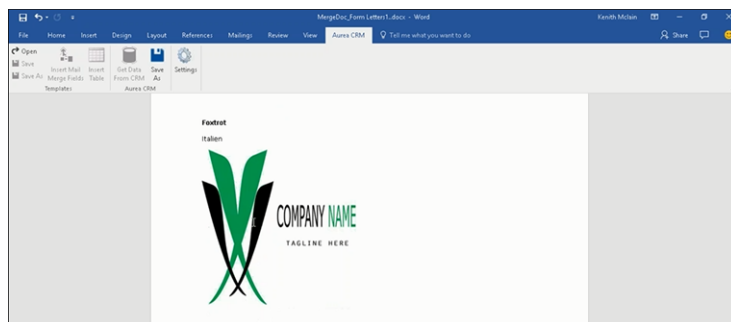
5. To resize the displayed image switch to the template document and click on the logo record, a sample image is displayed, resize it as you would resize an image in a word document.

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.
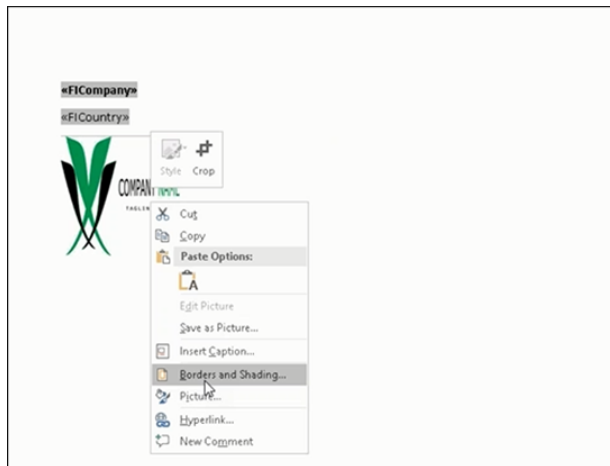
7. Add a border using the standard Borders dialog in MS Word.

8. Click to execute Mail Merge again. The resulting document is shown in the screenshot below.
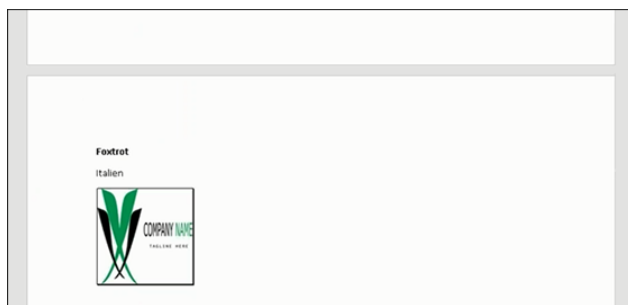
Adding Tables to a Template Document

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 new Document Template on page 300. In step 11, you have to create a query that will retrieve the fields from the infoarea that has the information that

you want to tabulate. For this example steps, we have created a complex query to retrieve the Company infoarea records along with its employee information.

2. From the Mail Merge Fields add the Company name and the Country fields to the template document.

3. Click Insert Table.

   The Table Builder Wizard (Step1/2) dialog displays. See the screenshot below.
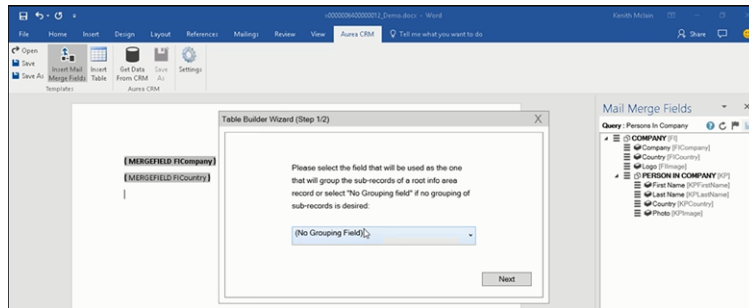
4. You can add tables to the template document based on a grouping field or without a grouping field. A grouping field groups the sub-records of a selected parent record.

   To add a table based on a grouping field, go to step 5.

   To add a table without grouping fields, perform the following steps:

   a. Click Next. The Table Builder Wizard (Step2/2) dialog displays.

   b. The Available Fields pane in the dialog displays the records that you can add to your table.

   c. Select the records that you want to add to your table and click to select the required records. The selected records are added to the Table Column Fields pane.
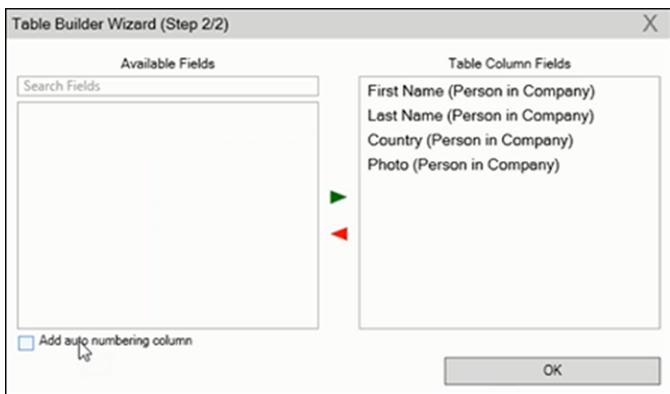
d. Click **Add auto numbering column** to add the numbering column for all the employees that get populated for each company in the result documents.

Note: The numbering re-starts for each separate table (hierarchical group) created in the result document.

e. Click OK.

f. The required code is generated and populated in the template document.
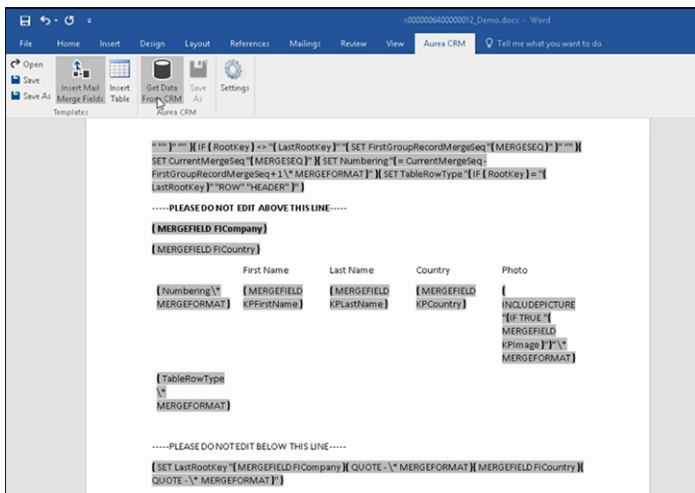
g. Click to execute the mail merge. The Select Records dialog is displayed.
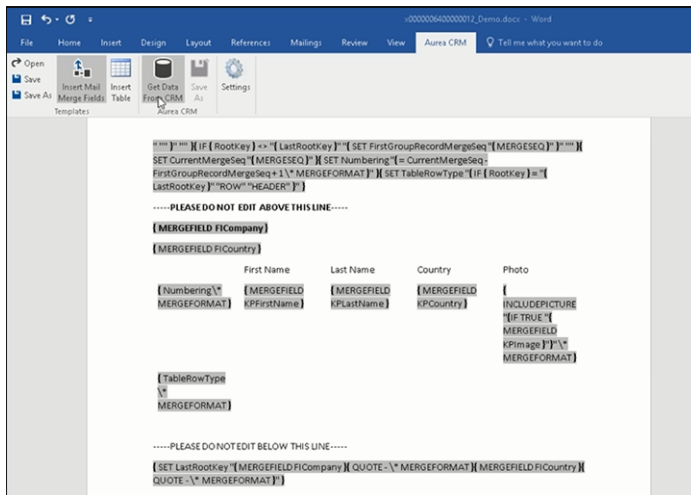
h. Click **Start Mail Merge**.

i. The results documents are created. Sample pages containing the tables for companies are shown below.

Another page:

j. You can add formatting to the table by selecting the table format in the template document and add the required formatting.

k. To format the table, go to the template document, right click the table and select Table Properties.
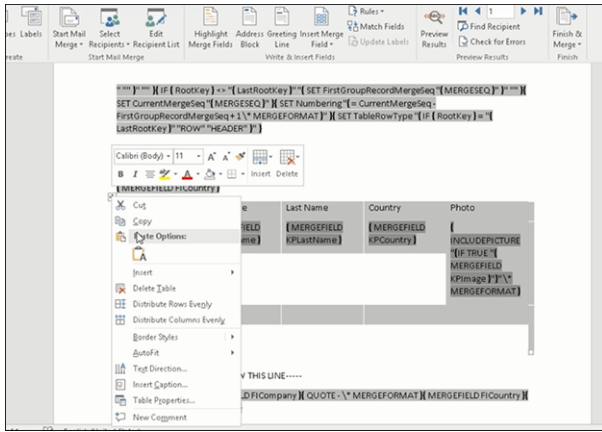
l. In this example, we will set the borders to the table. See the screenshot below for the **Table properties** > **Borders and Shading** dialog.
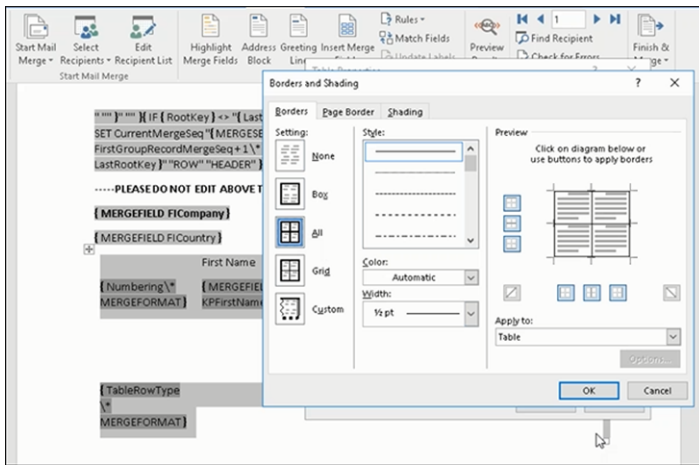
m. In this example, we apply a simple formatting to the table. All borders to the table grid. See the screenshot below.
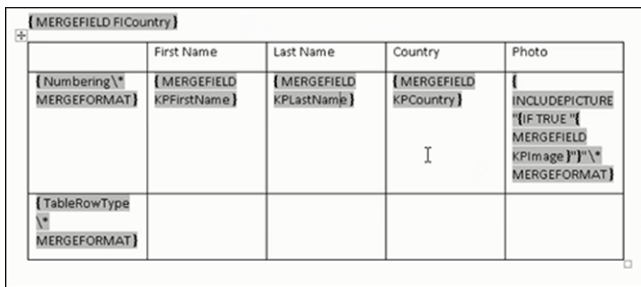
n. You can resize the image. Click the image record in the table and resize the image visible in the table cell. See the screenshot below.

o. To see the result of resizing, click to start the mail merge. A result page is shown in the screenshot below. The images are displayed in the size specified 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:** Note: This grouping fields does not show Company record in the available fields as it is not a sub-record of the selected grouping field, Country (Person in Company) field.

c. Select the records you want to add to the table columns and click ►t o add the records to the Table Column Fields. Click OK.

The table wizard generated the required code in the template document.

d. Add the Company name and the Company Country records to the template document. See the screenshot below.
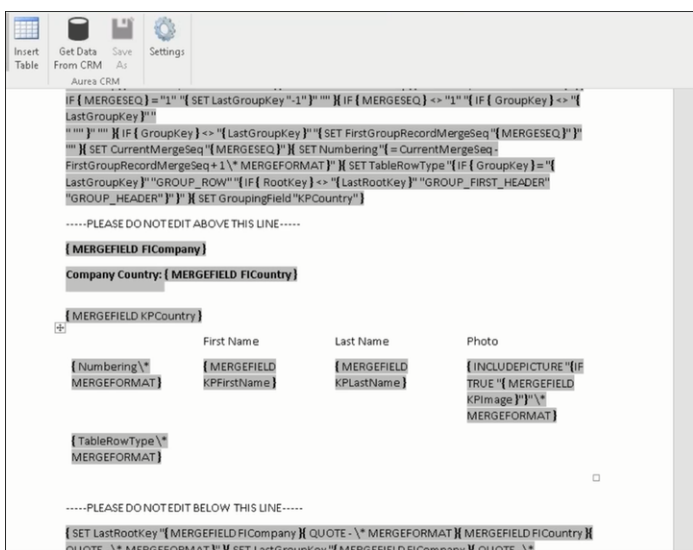
e. Click to execute the mail merge. The Select Record dialog displays. See the screenshot below.
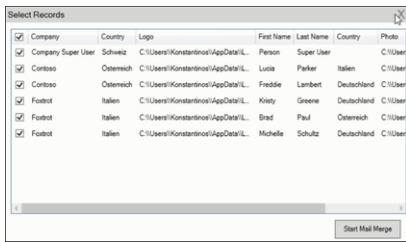
f. Click Start Mail Merge to generate the result document.

The result document contains three tables for each company, based on the country of the employee (grouping field), which are three countries.

The following screenshot shows the result document showing the employee tables for the company "Contoso" in two tables for the grouping in terms of countries: Deutschland and Italien.
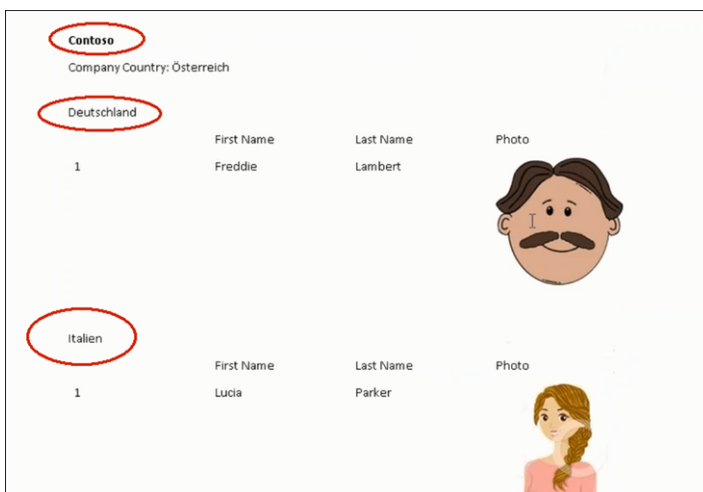
6. Click **Save As** to save the template document. The **Save As** dialog displays.

A default name in the following format is automatically displayed, `<document-Name_<date>_<user name>`. In the screenshot above the default name is `<Demo>_<2016-12-21>_<SU>`.

7. Click **Save**. The template document is saved to the D1 infoarea of the Aurea CRM server.

6

Currencies

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

In addition, you can display amounts in a second currency in various info areas. This allows you to display values in two currencies, e.g. euro and US dollars.

Exchange Rate

Select **Settings** > **Maintenance** > **Exchange Rate** to define exchange rates.

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.

Currency Conversions

Currency	Base Currency	Base Currency 2	Conversion Factor	Conversion Factor 2
	Euro		1,0000000	
CHF	Euro		1,2370000	
GBP	Euro		0,8290000	
USD	Euro		1,3280000	
YEN	Euro		117,2280000	

The exchange rate is always added for the base currency. Currencies can be converted to and from the base currency. By defining exchange rates between all currencies and the base currencies, any currency can be converted to any other currency via the base currency.

If you define an exchange rate record that does not contain a currency in the **Currency** field, you can use this record to convert values without a currency to other currencies (e.g. to convert values where no currency has been entered in an order). The first record in the example above allows values without a currency to be converted to euro, and by extension to all currencies for which an exchange rate is defined where euro is the base currency.

Note: You can work with more than one base currency. However, Aurea recommends only working with a single base currency. If you nonetheless wish to work with several base currencies, contact your Aurea representative.

Example: Exchange rate, receipts and expenses

The same exchange rates as in the previous example apply.

Following a business trip, hotel bills are submitted in USD and CHF (**Amount** and **Currency** fields). The expense record is however added in euro. The amounts are converted automatically (**Receipts Total** and **Total Amount** fields).

Changing the Currency in a Record

You subsequently change the currency in all info areas except for the **Offer** and **Offer Item** info areas. Amounts are converted automatically.

Note: For currencies to be converted, appropriate exchange rates between the currencies need to be defined, >> Exchange Rate on page 324.

Displaying Amounts in a Second Currency

To determine your second currency:

1. Select (**Settings**) > **User Configuration**.

2. Switch to the **Handling** tab.

3. Select a **Base Currency** and save.

4. Select (**Settings**) > **Invalidate Cache**.

Amounts entered in records are automatically displayed in this second currency next to the value in the original currency. Sum totals in lists are also displayed in this currency.

Note: The name of the second currency field is the same as the field containing the original currency with the suffix "2C" (**2**nd **C**urrency). These fields are not visible by default in Aurea CRM web.

For currencies to be converted, appropriate exchange rates between the currencies need to be defined, >> Exchange Rate on page 324.

Corporate Currency

You can define a corporate currency in Aurea CRM. This corporate currency can then be used to carry out analyses and evaluate data. When adding records that contain fields used to store values in the corporate currency, the currently valid exchange rate between the record's currency and the corporate currency is entered in the record. This provides you with a snapshot of the value at the time the record was added, and the exchange rate is not updated automatically if it changes in the meantime.

For example, you can convert all prices and other currency amounts entered in the local currency in opportunities and orders to the corporate currency, e.g. to analyze and compare results for various regional subsidiaries.

The corporate currency is defined using the `update_CorporateCurrency` variable. Select the desired currency in the **Catalog Text** field of the variable value, >> Variables in the *CRM.core Administrator Guide*. If you subsequently change the corporate currency, the new currency is not updated in existing records.

To store values in the corporate currency in records, you need to add a new reference field to the corresponding info area in the data model. The field type must be "corporate currency". You then need to select the field (e.g. **Total Product Value** in the **Opportunity** info area) whose value is converted to the corporate currency and written to this field, >> Adding New Fields in the *CRM.core Administrator Guide*. Three additional fields are automatically added:

- Exchange rate (numeric field): Used to convert values between the two currencies. The current exchange rate is transferred from the **Exchange Rate** info area when adding a new record. If the exchange rate is changed manually, all corporate currency fields in the record are recalculated using the new exchange rate. If the exchange rate is deleted, the current exchange rate in the **Exchange Rate** info area is entered automatically.

- Date (date field): The date on which the exchange rate was transferred from the **Exchange Rate** info area or the date it was edited manually. This date is entered automatically.

- Corporate currency (variable catalog): Cannot be edited.

In order to convert amounts between currencies in a record, the corresponding currencies need to be entered in the **Exchange Rate** info area and the currency used by amounts needs to be entered in the record itself.

Values in the corporate currency (i.e. in corporate currency fields) are updated in the following cases:

- Whenever the value in the referenced field (i.e. the value in the record's currency) is edited

- Whenever the exchange rate entered in the record is updated

- The currency entered in the record is changed

Note: Changes to the exchange rate in the **Exchange Rate** info area are not automatically applied to existing records.

7

Items
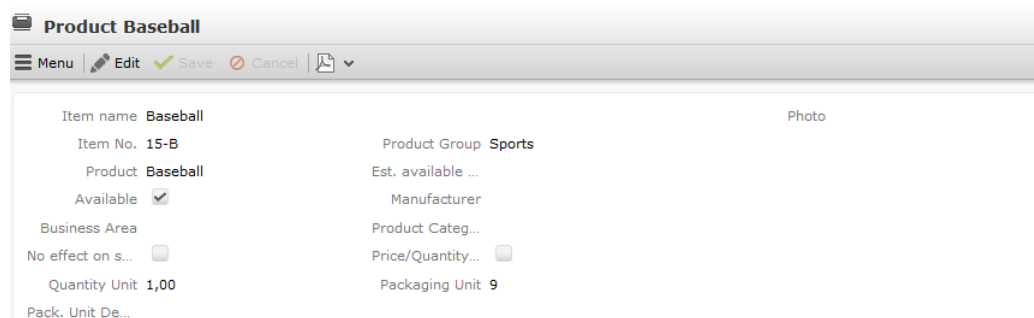
You can manage the items offered by your company in the item master in Aurea CRM. The item master stores all items.

You can:

• Add items and search for existing items

• Enter multi-lingual descriptions of each item, >> Item Master Text on page 330.

• Automatically transfer item details to other info areas (e.g. offer items, installed base items etc.)

• Group your items within product groups and products

• Add complex price structures in various currencies with sales prices, time-limited offers, and bulk prices and discounts which are used to automatically calculate the sales price, >> Price Lists on page 331.

• Define discounts for each product group, product or item that apply to individual companies, and transfer discounts between companies, >> Conditions on page 334.

• Define hierarchical item structures, >> Item Structure on page 337.

Note: You can also search for items in Aurea CRM win using the item search (🔍), >> update.seven win Business Logic BTB manual.

Item Master

The **Item Master** info area stores basic information about individual items. For more information on the individual fields, refer to the online field help.

To add a new item, select ▣ (**Products & Service**) > **New Item**.

The **Product Group** and **Product** fields access catalogs. The product catalog is a child catalog of the product group catalog: if you enter a product group in the **Product Group** field, only the products in that category can be selected in the **Product** field.

The **Product Group** and **Product** play a role in other info areas:

- For example, you can define discounts for a product or product group, which then apply to all items belonging to that product or product group.
- Sales planning is carried out for product groups.
- Sales groups are added for product groups.

You can define any number of price lists for each item, and enter descriptions in various languages, >>

The following info areas access the item master:

- **Offer Item**
- **Order Item**
- **Stock**
- **Stock Control Item**
- **Installed Base**
- **Installed Base Item**
- **Conditions**
- **Skills**
- **Quantity Scale**
- **Ticket**
- **Sales Area (Item)**
- **Service Contract Item**

Click on ⌕ (**Select**) next to the **Item No.** field in these info areas to select the desired item. Data from the item master is transferred to the record (e.g. **Item No.**, **Item name**, **Business Area** etc.).

Note: If a record is deleted in the **Item Master** info area, all sales sector items relating to this item are also deleted.Do not subsequently change the **Item No.** and **Item name**, as these changes are not applied to any linked records (e.g. stock control items), in order to retain the history using the original **Item No.**. Any

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calculations carried out for records containing the old item number will no longer be correct.

Item Master Text

To add a new item master text:

1. Select the desired item in the **Item Master** info area.

2. Select **New** > **New Text** from the context menu.

3. Select the **Language**. If you do not select a language, the description applies to all languages for which no description has been entered.

4. Enter a **Description** (for the customer) and, if necessary, an **Internal Description**.

5. Save.

If you open a offer item or order item containing this item, the item master test is transferred to the **Description** field (in the **Language** entered in the offer or order).

Note: Your administrator can add a reference field to info areas that access the item master which can store the item master text in the language assigned to you (provided the text exists).To do so, your administrator needs to define an N-N link (`(Idx=1),?->(AT)Item Master Text: (Idx=1)Language`) and define a reference field to the item master text. In info areas that access the item master text (e.g. **Installed Base**), your administrator then needs to define an N-N link (`(Idx=0 Item No..,? -> (AT)Item Master Text: (Idx=1) Item No.,Language`) and a new field containing the reference to the item master text, >> *CRM.core Administrator Guide*. This field can then also be used as a filter.

Price Lists

Any number of price lists can be defined per item. When adding a new offer, the price list is used to determine the sales price of the item, >> Adding Offers on page 357.

There are three types of price lists:

- **Individual Price Lists:** Price list for an individual company (**Indiv. Price List** field)

- **Customer Group Price Lists:** Price list for a group of companies (**Customer Group Price List** field)

- **Country Price Lists:** Price list for a specific country (**Country** field)

Only **one** of the three fields may contain an entry in each price list. When determining the price of an item, the individual price list is applied first. If no suitable individual price list is available, a customer group price list is used, and finally the price list for a country is used if no other list is found, >> Pricing on page 363.

The **Currency** entered in the **Price List** and **Offer** info areas must match, as no currency conversion takes place when adding offers.

Note: Assign the price list to be used by a company in the **Company** info area (**Indiv. Price List** and **Country** fields). Enter the customer group price list in an offer or order (**Customer Group Price List** field).All price lists added for an item are displayed under **Related Data** for the item.

Editing Price Lists in Aurea CRM web

To edit a price list in Aurea CRM web:

1. Switch to the desired item.

The price lists defined for the item are displayed in the **Price List** tab under **Related Data**.

2. You can open the price list in tabbed view and edit it.

3. The **Discount** tab allows you to define **bulk prices** and **discounts** that apply when a certain quantity of the item is ordered, >> Bulk Volumes on page 332.

Bulk Volumes

You can define bulk volumes in the **Bulk Volumes** info area (not available by default in Aurea CRM web). You can enter floating point numbers. These volumes define the quantities for the corresponding different bulk prices and discounts that apply to an item. You can define discounts (either as fixed **bulk prices** or as **bulk discounts**) in price lists for items in Aurea CRM web, >> Editing Price Lists in Aurea CRM web on page 332. If both a bulk discount and a bulk price have been entered, the bulk price takes precedence when calculating prices. The quantities defined in the **Bulk Volumes** info area determine the quantities of the various volumes and thus the quantities up to which the **bulk price** or **bulk discount** applies.

When adding new records, information is transfered from the item master (e.g. **Product Group**, **Product**). You can define a quantity scale for each item, e.g.

1st Bulk Vol. = 5	The 1st price and discount apply for 1-5 units
2nd Bulk Vol. = 10	The 2nd price and discount apply for 6-10 units
3rd Bulk Vol. = 20	The 3rd price and discount apply for 11-20 units
4th Bulk Vol. = 30	The 4th price and discount apply for 21-30 units

The bulk volumes apply to all price lists created for this particular item.

Fields and Functions in the Price List

Field	Function
Valid from	If no date is entered, the price list applies indefinitely.
Selling Price	The basic price to which discounts and bulk discounts are applied.
Purchase Price	Used as the basis for calculating the profit margin for offers and offer items (as a percentage of the sales price).
Special Price	A special time-limited price.
Special Price Valid From/To	The time period the special price applies.
Special Price Discount	If this field is enabled, the system checks whether any special conditions have been defined for the current company that are then applied to the special price.

1st - 10th Volume Price	Determines the sales price used for the corresponding bulk quantities. Bulk quantities and the associated price structure are defined in the Bulk Volumes info area. These settings apply to all price lists for this item.
	If both a bulk discount and a bulk price are entered, the bulk price takes precedence.
	Bulk discount cannot be applied to special prices, and a special price takes precedence over the bulk price.
1st - 10th Volume Dscnt.%	Discount as a percentage, applied for bulk orders of the specified volume, and subtracted from the selling price.
	Do not enter bulk prices if you have entered bulk discounts, otherwise the discount will not be applied and the bulk price is used instead.

Conditions

You can define conditions (i.e. special discounts) in the **Conditions** info area (not available in Aurea CRM web by default) that are applied to items, products and product groups.

Conditions are company-specific, whereas price lists are created for specific items. Conditions can however be inherited by one company from another, >> Inheriting Conditions on page 335 .

There are two types of conditions:

• Fixed price for a single item

• Discounts for items, products or product groups

These conditions are taken into account when determining the price in an offer, >> Pricing on page 363.

You can only define one fixed prices defined in the **Conditions** info area in a single currency. The price is converted to other currencies using the exchange table.

However, no currency conversion takes place for price lists if the offer was added using a different currency: the price list is then invalid for the item.

Fixed prices take precedence over all other prices. Discounts (bulk discounts, conditions) are not applied to fixed prices.

Discounts

If you enter a discount in the **Conditions** info area, the **Fixed Price** field must remain empty. There are three types of discount:

• **Item discount:** Only applies to an item and is defined by entering a **Product Group**, **Product** and **Item**

• **Product discount:** Applies to all items of the same product and is defined by entering only the **Product Group** and **Product**

• **Product group discount:** Applies to all items in the same product group and is defined by entering only the **Product Group**

Discounts are applied to sales and bulk prices.

Use the **Special Price** discount in the **Price List** info area to determine whether discounts should be applied to special prices.

Inheriting Conditions

When adding new offers, you can "inherit" conditions within a corporation.

Use the **Corp. No.** and **Corp. Discount** fields in the **Company** info area to create the hierarchy used to inherit corporate discounts.

The entry in the **Corp. No.** field defines the corporation number; any companies where this value is entered in the **Corp. Discount** field inherit the conditions from this company.

Note: The corporation number is unique in the database. You cannot add a second company with the same corporation number.

Example:

• Company "Parent": **Corp. No.** = 214, **Corp. Discount** = empty

  The "Parent" company does not inherit conditions from other companies and its conditions are inherited by all companies where "214" is entered in the **Corp. Discount** field.

• Company "Subsidiary": **Corp. No.** = 21408, **Corp. Discount** = 214

  The "Subsidiary" company inherits the conditions defined for the "Parent" company and its conditions are inherited by all companies where "21408" is entered in the **Corp. Discount** field.

• Company "Sub-Subsidiary": **Corp. No.** = empty, **Corp. Discount** = 21408

The "Sub-Subsidiary" company inherits conditions from the "Subsidiary" company (and by extension, from the "Parent" company), but its conditions are not inherited further.

Order in Which Conditions are Applied

The following section illustrates the order in which conditions are taken into account. For more information on how conditions are applied to the entire pricing process, >> Pricing on page 363.

The system checks for **fixed prices** across the entire inheritance hierarchy. Once a fixed price has been found, the entire pricing process ends.

The following diagram illustrates the order in which the **discounts** are tested. The numbers indicate the order in which possible conditions are tested.

Company →		Grandchild	Child	Parent	...
Discount ↓					
Item discount		1	4	7	10
Product discount		2	5	8	...
Product group discount		3	6	9	...
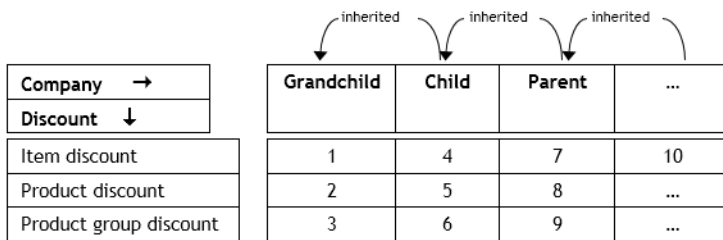
The system first searches for an item discount defined for the current company (in this example, "Grandchild"). If no item discount is found, the system searches for a product discount defined for the company. If no product discount is defined, the system searches for a product group discount defined for the company. If no discount is found that applies to the current company, the system searches for discounts defined for the parent company from which discounts are inherited (in this example, "Child"). The order in which the system searches for discounts for the parent company the same as for the initial company (item, product, product group discount). If no discount is found for the parent company, the system searches for a discount at the next highest level in the discount hierarchy (in this example, "Parent") in the same order. The search ends once an applicable discount has been found. The applicable discount is applied to the sales or bulk price. Discounts are not cumulative.

You can determine that discounts defined at a more specific level (i.e. for a product or specific item) inherited from other companies should take precedence over less specific discounts (i.e. for a product group or product) defined for the current company, >> Inheriting Conditions on page 335.

Use the **Check Corp.Price?** field in the **Conditions** info area to determine whether the search should check for discounts inherited from parent companies even if a **product group discount** or **product discount** is found by the system. If the field **Check Corp.Price?** is enabled, the system checks for more specific discount defined for parent companies. The first suitable discount at the most specific level (item discounts take precedence over product discounts, which take precedence over product group discounts) is used. Discounts inherited from other companies are only used if they are defined at a more specific level:

• If a discount at the **item level** is entered for the current company, the system **does not** check for discounts entered for parent companies (as discounts at the item level are the most specific).

• If a discount is only defined at the **product level** for the current company, the system checks for **item discounts** entered for parent companies.

• If a discount is only defined at the **product group level** for the current company, the system checks for **item discounts** entered for parent companies; if none is found, the system checks for **product discounts** defined for parent companies.

Example:

Conditions have been defined that are inherited from parent companies. The **Check Crop.Price?** check box is **enabled** in the product group discount for the "Grandchild" company. If you add an offer and offer items to which the product group discount (5%) applies, the system searches for suitable product and item discounts defined for parent companies. In this example, an item discount is defined for the "Parent" company. This item discount (15%) is applied to the sales price of the offer items.

If no discount is defined for the parent companies (or if the **Check Corp.Price?** check box is **disabled**, the product group discount (5%) is used.

Company → Discount ↓	Grandchild	Child	Parent
Item discount	-	-	15 %
Product discount	-	11 %	14 %
Product group discount	5 %	10 %	13 %

Item Structure

You can define item structures in Aurea CRM in order to depict products in your product catalog, components in a product consisting of multiple items or a basic product and its additional components (e.g. a bicycle composed of a frame, breaks, tires, saddle etc. or a games console package including two controllers and a game).

Defining item structures provides you with quick access to items and related items in the item structure, and allows you to restrict and group items, e.g. in the quick add area, >> Item Structure in the Quick Add Area on page 343.

Items are defined in the **Item Master** info area and are linked to form a structure in the **Item Structure** info area. Whenever you add an item structure record, Aurea CRM automatically updates the item structure.

Item structures are defined by adding item structure records and entering the **Structure type** and the **parent item** in the field. A single item structure consists of all items linked to one another (directly or indirectly) using the same structure type. The top level of the hierarchy (the root) has no parent node. The item structure is thus defined from bottom to top. Any number of items can have the same parent item. Only items without children (leaves) may be present in the item structure more than once to ensure that the item structure is unique. Ensure you do not define any cyclical structures.

To add an item structure:

1. Switch to the desired item in the **Item Master** info area.

2. Switch to the **Item Structure** tab and click on ⊕ (**New**).

3. Select the parent item.

4. Select the **Structure type**.

5. Save.

   The item structure is added or updated automatically.

The item structure itself is formed based on the station and serial numbers of item structure records. The keys (station number and serial number) of item structure records higher up in the hierarchy and of the current item structure record are automatically entered in the **PB_1_StaNo/SerNo** - **PB_10_StaNo/SerNo** fields. These fields depict the path from the current item structure record to the root item structure record. The root item structure's key is always entered in the **PB_1_StaNo/SerNo** fields and the **Generated** check box is enabled automatically in the root item structure record (this record is generated automatically). The item structure can consist of up to 10 levels.

Example:

Six item, A1-A6 are present in the system. The **Structure type** "Structure 1" is used to depict the item structure. The following image illustrates the item structure.
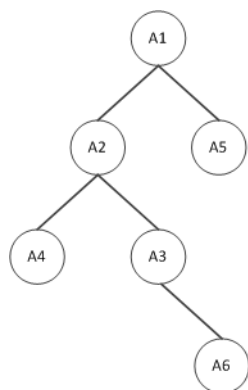
Item 6 (A6) is represented by the following item structure record, which stores the full path to item 1 (A1, the root item). **IS_4_StaNo/SerNo** contain the station number and serial number of the current record (A6), **IS_3_StaNo/SerNo** contain the the key of the item structure record added for item 3 (A3) etc.

Whenever you delete an item structure record or an item, Aurea CRM automatically updates the item structure. If you delete a node (item or item structure record) that has child nodes, the child nodes immediately below the deleted records become the root nodes of new item structures.

If you make changes to the item structure records themselves, you can update the item structure.

To update the item structure automatically:

- Aurea CRM win: Select **Item Structure** from the context menu in the **Item Master** info area. Select **Generate Relationship Hierarchy** from the context menu in the **Item Structure** info area.

- Aurea CRM web: Use a CRM.server To-Do (type 20), >> To-Do Types in the *CRM.core Administrator Guide*.

Note: The **IS_X_StaNo/SerNo** fields are not communicated and are recalculated when inputting the communication file.When importing an item structure, the **Item No.** and **Parent Item No.** are used to create the hierarchy automatically.

Item Structure Links

Aurea CRM offers indirect links between items in the **Item Master** info area (via the **Item Structure** info area) that can be used to defined queries applied to the item structure, for example.

Links 950-980 and 30000-36000 are available by default and apply to all item structure records (irrespective of the structure type), >> Link IDs in the *CRM.core Administrator Guide*.

- **30000:** Returns the entire item structure
- **32000:** Returns all parent items
- **34000:** Returns all child items
- **36000:** Returns all parent and child items both higher up and lower down in the hierarchy

The following image outlines the difference between links 30000 and 36000.
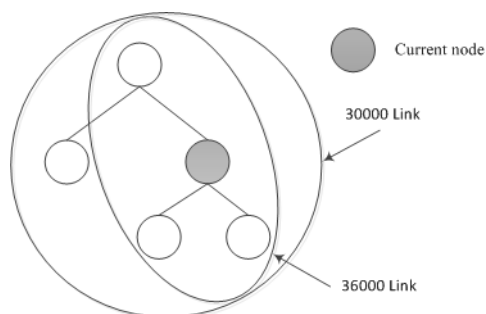
Example:

Six item, A1-A6 are present in the system. The **Structure type** "Structure 1" is used to depict the item structure. "Sport" is entered as item 2's **Business Area**. The following image illustrates the item structure.
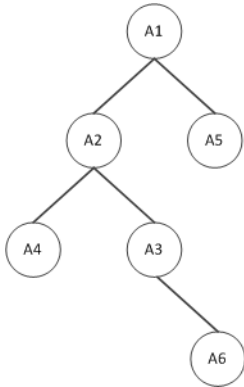
Define a query that returns all items whose business area is "Sport" as well as all items linked to these items via the item structure (**Structure type** "Structure 1").

Link **34000** returns items 2, 3, 4 and 6.

Link **32000** returns items 1 and 2; link **30000** returns all items and link **36000** returns items 1,2, 3, 4 and 6.

You can define variables of the **Type** "Condition" to define additional links using your own condition. You can define up to 10 different conditions for item structures using the 30000-130000 links. These links are numbered in intervals of 10,000 and are named according to the structure type (e.g. "Structure 1").

You can define the following 10 variables:

`CORE::INDIRECT-IS-LINK-TREE-0` (this variable further restricts the default links 30000-36000).

`CORE::INDIRECT-IS-LINK-TREE-1`

`. . .`

`CORE::INDIRECT-IS-LINK-TREE-9`

Example:

Define the variable `CORE::INDIRECT-IS-LINK-TREE-1` in the **Rights** module in Aurea CRM win. Select the **Item Structure** info area in the **Info Area** field, the **Structure type** field in the **Field Name** field and "Condition" in the **Type** field. Add a variable value for the variable and enter the comparison field and desired structure type in the **Var. Text** field, e.g. "F6='Structure 1'".
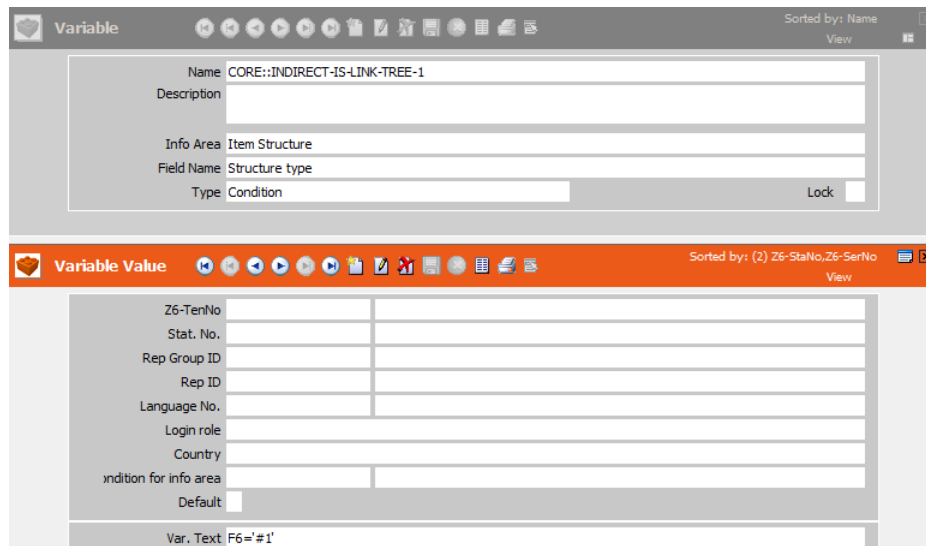
If you define conditional access rights for items in the **Rights** module in Aurea CRM win and apply conditions to the **Item Master** info area, you can select the default indirect links and the links that only apply to the structure type used to define the item structure in the **Index Relationship** column. This allows you to define that a rep can access items assigned to a specific business area, as well as all related items in the item structure, for example.

Note: For more information on variables, >> Variables and Conditions Applied via Indirect Links in the *CRM.core Administrator Guide.*

Item Structure in the Quick Add Area

Your administrator can integrate a tree displaying the hierarchical item structure in the generic quick add area for items (e.g. for offer items). You can then select items directly from within the tree. All child items in the item structure are displayed in the quick add area. The selected item can also be displayed, if configured accordingly.

For information on the configuration, refer to `HierarchicalSerialEntry` in the *Aurea CRM web Administrator Guide.*

If you open the quick add area, the tree view is displayed on the left, and the quick add area on the right displays all items, including those not in the item structure, >> Quick Add on page 202. All items continue to be listed in the quick add area until an item is selected from the tree.

- Click on ➤ or ⌄ in the tree to show/hide items (nodes).
- Click on an item in the tree to display only those items below the selected item in the tree in the quick add area.

Note: By default, the selected item is not displayed in the quick add area on the right. Your administrator can however determine that the selected item (node) is displayed (as in the mountain bike example).By default, the tree only displays

structure nodes (e.g. "Gearshift (MB)") and not individual items (e.g. "Gearshift LX"). Your administrator can however determine that items are also displayed in the tree, as in the example.Your administrator can define the order in which items are sorted in the tree (e.g. in ascending or descending alphabetical order).

- Search criteria and filters (e.g. **All**) are applied to the selected item and child items displayed in the list.

  For example, enter all or a portion of an item's number in the **Item** field to restrict the display to only those items with a matching number. For example, if you select the **Mountain Bike** node in the tree and enter "*04*", only items c204-1, c204-11, c204-12 and c204-13 are displayed in the list.

  Note: Click on the **Overview** filter button to remove the current selection from the tree and display those items in your shopping cart. Clicking on the **Last Entries** filter button also removes the current selection from the tree. If the **Overview** or **Last Entries** filters are enabled and you click on an item in the tree, the **All** filter is automatically applied.

- Click on **Deselect** to clear the selection in the item tree. Filters and search criteria apply to the display of all items in the quick add area, irrespective of whether they are in the item structure or not.
- Drag the separator between the tree and quick add area to change the width of the tree.

8

Opportunities

You can add opportunities in Aurea CRM once you have heard of a possible sales opportunity. Throughout the sales process, you will collect more and more information relating to the opportunity. Enter this information in Aurea CRM so that you and your colleagues can access the current status of an opportunity at any time.

Opportunity management in Aurea CRM allows you to:

- Add opportunities and manage them, >> Adding Opportunities on page 346.
- Add opportunity products including details (estimated price etc.), >> Adding Opportunity Products on page 348.
- Enter the persons involved in an opportunity as participants with specific roles (decision maker, partner etc.) including details on the participants' attitude and influence, >> Adding Opportunity Participants on page 347.
- Add an installed base for an opportunity participant, >> Adding Installed Bases for Opportunity Participants on page 347.
- Add Opportunity Competitors, >> Adding Opportunity Competitors on page 351.
- Document all activities that take place within the scope of the opportunity, >> Adding Activities for Opportunity Participants on page 347.
- Once you have begun negotiations, you can create an initial offer and automatically transfer information from the opportunity to the offer, >> Adding Opportunity Offers on page 349.
- Opportunities can be rated, allowing you to concentrate on those opportunities with the highest expected impact/revenue, >> Rating Opportunities on page 351.
- Analyze opportunities, e.g. for revenue forecasts or to optimize your sales processes, >> Sales Funnel on page 352 and Bubble Charts on page 196.

Note: The number of phases in an opportunity and the phases that must be included depend on your company, internal processes, sector etc. The opportunity process in Aurea CRM can be customized to meet your requirements, >> *Aurea CRM web Administrator Guide.*

Your administrator can define that an opportunity consists of a certain number of phases, and that certain records are added in each phase of the opportunity. **Example**: Upon specifying a contact person, an activity involving the contact person is automatically added for the responsible sales rep.

You can determine that an opportunity is split up over several levels in the Workflow Designer info area. Each level can then be divided into various steps, and triggers can be assigned to these steps, >> *update.seven win Business Logic BTB manual* (in the chapter *Worflows for Opportunities*).

Adding Opportunities

Fundamental information on sales opportunities is stored in the **Opportunity** info area.

To add an opportunity:

1. The following options are available:

- Select (**Sales**) > **New Opportunity**. Select a company.

- Switch to the company you wish to add the opportunity for, and select **New** > **New Opportunity** from the context menu.

2. Enter the following details:

- Name of the **Opportunity**.

- **Currency**

- Estimated product value (**Total product value**)

  You can also add opportunity products, in which case the product value is automatically calculated, >> Adding Opportunity Products on page 348.

- The opportunity's investment and realization probability, >> Entering the Value of an Opportunity Directly on page 348.

- The estimated **Completion Date**, >> Sales Funnel on page 352.

3. Save.

4. Add the following additional information regarding the opportunity:

- Opportunity participants >> Adding Opportunity Participants on page 347

- Opportunity products and offers, >> Adding Opportunity Products on page 348 and Adding Opportunity Offers on page 349

- Opportunity Competitors, >> Adding Opportunity Competitors on page 351

- Activities, >> Adding Activities for Opportunity Participants on page 347

- Document links, >> Documents on page 289

- Installed base, >> Adding Installed Bases for Opportunity Participants on page 347

- Opportunity rating, >> Rating Opportunities on page 351

Adding Opportunity Participants

Opportunity participants are those companies and persons involved in the decision-making process of an opportunity, e.g. contact persons, planners, local authorities, partners etc. Opportunity offers are always added for opportunity participants, >> Adding Opportunity Offers on page 349 and Participants and Roles on page 112

Adding Activities for Opportunity Participants

If you have an appointment with an opportunity participant, you can add a corresponding activity.

To add activity for an opportunity participant:

1. Switch to the desired opportunity.

2. The following options are available:

- Select **New** > **New Activity** from the opportunity's context menu. Select the opportunity participant.

- Select **New** > **New Activity** from the opportunity participant's context menu.

The input mask for activities is displayed, >> Activities on page 260.

Adding Installed Bases for Opportunity Participants

The **Installed Base** info area allows you to store the products currently used by a customer, >> Adding Installed Bases on page 583. Installed bases are added from an opportunity participant.

Opportunity Products and Offers

There are several ways to calculate the value of an opportunity based on the values entered in opportunity products and offers.

Entering the Value of an Opportunity Directly

If you only have estimates available when first dealing with an opportunity, and have no specific details on products, enter the values directly in the opportunity. Once you add products or an offer with items for the opportunity, these values are over-written.

- **Total product value**: Estimated total value of the opportunity
- **Wtd. total product value**: The estimated value weighted by the probability of the opportunity
- **Realization probability (%):** The probability of the customer placing an order corresponding to this opportunity with anyone.
- **Investment Probability (%)**: Probability of the customer placing an oder with **your** company (and not with a competitor).

A further weighted value is calculated automatically:

```
Wtd. total product value = Total product value * Investment
Probability(%)[opportunity]
* Realization Probability(%)[opportunity]
```

For more information on the individual fields, refer to the online field help.

Adding Opportunity Products

If you know which of your products have attracted the interest of a potential customer, you can add the products as opportunity products.

To add opportunity products:

1. Switch to the desired opportunity.

2. Switch to the **Opportunity Products** tab and click on ⊕ (**New**).

3. Enter the following details:

- **Product Group** and **Product**
- **Product value** (the absolute product value)
- **Wtd. product value** (the product value weighted by the probability)

Note: If you edit the **Prod. Value**, the **Wtd. Prod. Value** is not updated automatically. Enter a value of 0 (zero) in the **Wtd. Prod. Value** to recalculate the value.

---

4. Save.

A second weighted value is calculated automatically by the system using the probabilities entered in the opportunity as follows:

Wtd. product value (Opportunity) = Product value * Investment Probability (%)[opportunity] * Realization Probability (%)[opportunity]

The product values of all opportunity products are totaled and written to the **Total product value**, **Wtd. total product value** and **Wtd. total product value (Opportunity)** fields in the opportunity. Manual values entered previously are overwritten in the process.

Note: If you add an item to an opportunity offer that corresponds to an opportunity product, the **Product value**, **Wtd. product value** and **Wtd. product value (Opportunity)** are overwritten with the values in the offer. The status of the offer must be "Order".Wtd. product value = Product value * Investment Probability (%)[offer] * Realization Probability (%)[offer]

Adding Opportunity Offers

If you add an offer for an opportunity, the value of the items in the offer are totaled and the weighted value is entered in the opportunity. In many cases, offers are subject to negotiations. Enter any changes to the offer in and add any follow-up offers. If the negotiations are successful, you can convert the offer into an order, >>

To add an offer for an opportunity:

1. Switch to the desired opportunity.

2. Switch to the **Opportunity Participants** tab and select **New** > **New Offer** from the desired participant's context menu.

   The new offer is automatically linked to the opportunity. If the opportunity participant is a person, the participant is entered as the contact person.

3. Enter the **Currency**. Once the offer has been saved, you can no longer edit the **Currency** field. The currency is transferred to the offer's items.

4. Enter further data concerning the offer, e.g. the **Offer No.**, **Realization Probability (%)** etc.

5. Save.

   The **PR-SerNo** (the serial number of the offer record) is entered automatically.

6. Select **New > New Offer Item** from the opportunity participant's context menu to add items to the offer, >> Adding Offer Items on page 358.

   The **Offer value** in the offer is calculated from the sum total of the value of all items (after any discounts have been applied to the items and offer). Offer items where the **Alternative item** or **Optional item** check boxes are enabled are ignored.

An opportunity product record is automatically added for each product entered in the offer item records using the following values:

• **Product value:** The value of the item.

• **Wtd. product value:** The item value weighted according to the probability of the offer

• **Wtd. product value (Opportunity)**: The item value weighted according to the probabilities entered in the opportunity

Note: If you add offer items to an offer in an opportunity that corresponds to an existing opportunity product, the **Product value**, **Wtd. Product value** and **Wtd. Product value (Opportunity)** fields in the opportunity record are overwritten with the values from the offer.Opportunity products are only added or updated automatically once the status of the offer is **Order**. The status is set automatically when creating an order from the offer.

If the currency entered in the offer differs from that in the opportunity, the values are converted automatically using the exchange rate table, >> Currencies on page 324.

For further information on offer and orders, >> Offers and Orders on page 355.

Adding Opportunity Competitors

Aurea CRM web allows you to store competitors also competing for an opportunity.

To add a competitor:

1. Switch to the desired opportunity.

2. The following options are available:

    • Select **New** > **New Competitor** from the opportunity's context menu.

    • Switch to the **Opportunity Competitor** tab and click on ⊕ (**New**).

3. Select a competitor from the drop-down list or enter a new name.

> **Note:** Competitors are not stored as companies or persons, but as catalog values.

4. Enter further information, such as the **Strengths** and **Weaknesses** of the competitor and the **Price** of the competitor's products.

5. Save.

Rating Opportunities

You can evaluate opportunities in Aurea CRM web. To do so, your administrator needs to define a portfolio, >> Portfolios on page 244. The portfolio format contains questions used to classify opportunities.

To evaluate an opportunity:

1. Switch to the desired opportunity.

2. Select **New** > **New Portfolio** from the context menu.

3. Answer the predefined questions.

By default, the rating determined for the opportunity is entered in the **ABC** field in the opportunity record.

Sales Funnel

Use the sales funnel to analyze your opportunities, for example to:

• Forecast future business development

• Localize possible problems and implement corrective measures

To access the sales funnel:

1. Select ![cart icon] (**Sales**) > **Sales Funnel**.
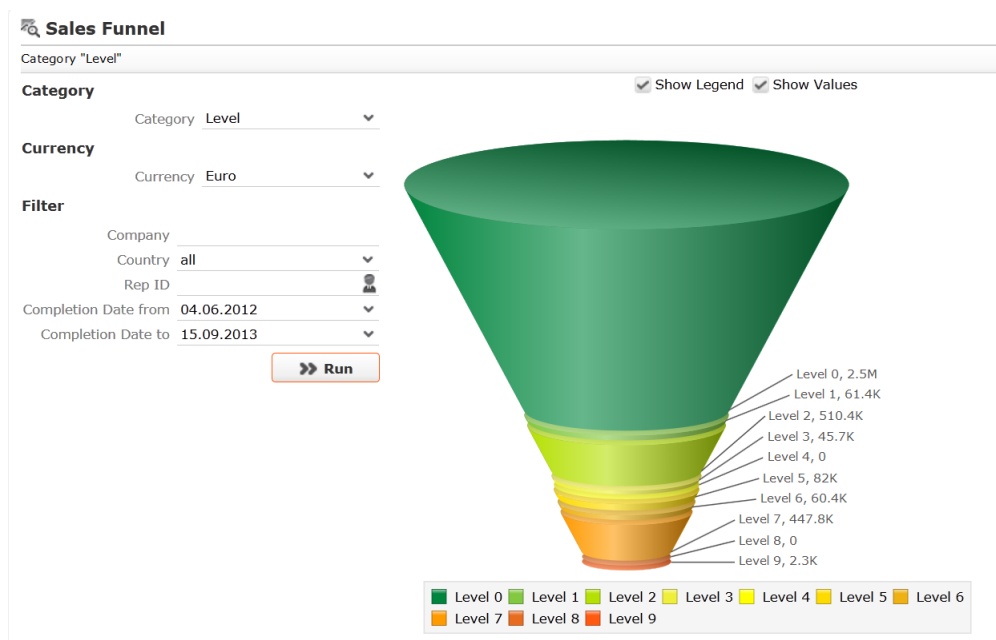
2. You can change which data is displayed, for example by choosing a different category or defining a filter and clicking on **Start**, >> Analyses on page 187.

Note: Only opportunities where a completion date has been entered are included in the sales funnel.

Note: You can analyze opportunities in the pipeline in Aurea CRM win, >> update.seven win Business Logic BTB manual.

Buying Center Wall

The buying center wall display all opportunity participants and provides suggestions for additional participants. You can display information on participants' roles (e.g. decision maker, contact person) and attitude (e.g. neutral, positive), manage participants and add notes. This allows you to keep track of individual participant's attitude and ensures that important participants are not forgotten.

Note: Your administrator can configure the appearance of the buying center wall (e.g. column sort order, font color), >> BuyingCenter in the *Aurea CRM web Administrator Guide*.

To open the buying center wall, switch to the desired opportunity and select **Buying Center** from the context menu.

The buying center wall is opened.
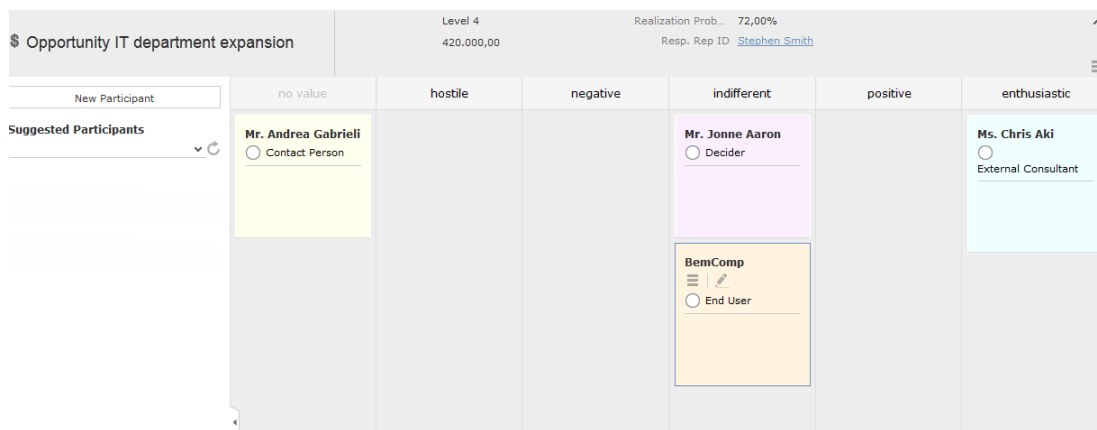
- The opportunity's participants are displayed in the main area on the right in various columns (grouped by attitude by default). If no attitude has been entered for a participant, the participant is displayed in the **no value** column. This column is only displayed if participants exist where no attitude is entered.

- Opportunity participants are color-coded according to their role.

- Information on the opportunity is displayed in the header, e.g. the level.

- If a participant's attitude has changed, drag the participant to the corresponding column to update their attitude.

- Click on a participant to display the context menu and edit icons.

   - Click on ✎ (**Edit**) to change the participant's role or enter a comment etc.

      Click on the circle (◯) to set the person's **Influence** (low, medium, high).

> **Note:** When in edit mode, you can save your changes (✔) or cancel them (⊘).
> You can also click on another participant to save, or press the Esc key to cancel
> your edit. You cannot drag and drop records while in edit mode.

- Open the context menu (≡) and select **Delete** to remove the opportunity participant.

- Click on **New Participant** in the sidebar to add a new participant to the opportunity. Choose the participant and then set their attitude by dragging the participant to the appropriate column.

> **Note:** The same participant can be added to the opportunity with multiple roles, but can only be added once per role.

- Open the **Suggested Participants** drop-down list and select an entry to display suggested participants:
  - **from other opportunities:** Those companies and persons are listed that are involved in other opportunities with at least one of the current opportunity's participants.
  - **from activities:** Those companies and persons are displayed that are entered as participants in activities linked to the current opportunity.
  - **from corporate structure:** This options suggests companies and persons in companies within the same corporate structure as the company the current opportunity was added for. Only companies/persons that are participants in other opportunities of the same **Type** as the current opportunity are suggested.
  - **from company:** All persons in the company (KP) the opportunity was added for are suggested (excluding those that are already participants).

  Drag the desired company/person from the list of suggestions below the **Suggest Participants** field to the appropriate column (e.g. indifferent) to add them to the opportunity as a participant. A corresponding opportunity participant record is added automatically and the participant's attitude is entered.

- If configured by your administrator, information is displayed in the sidebar on the **Missing required roles** and **Missing optional roles**. For example, you may need to add 3 consultants, but have only added one.

- Click on ⬍ or ⬍ to hide/show the sidebar and **Related Data**.

- Data related to the current opportunity is displayed under **Related Data**.

- Click on ≡ (**Context Menu**) on the right of the header to access the context menu, e.g. select **Tab View** to open the opportunity in tab view.

9

Offers and Orders

If you submit an offer to a customer, you can save the offer in Aurea CRM web. Offers (and orders) consist of a parent record that contains data relating to the entire offer (e.g. offer number, currency etc.), and item records that contain data concerning the individual items in the offer (or order).

If a customer places an order, you can copy the offer's data to an order, >> Copying Offer Data to Orders and Service Contracts on page 359.

Offers can be added for companies and persons, orders can only be added for companies.

Aurea CRM web allows you to:

- Edit, copy and add offers and add items to your offers using information stored in the item master, >> Offers on page 356.
- Price items automatically based on price lists and other conditions, >> Pricing on page 242.
- Add offers to opportunities or properties, >> Opportunities on page 345 and Properties - BTB only on page 412.
- Add the companies and persons involved in offers as participants, >> Participants and Roles on page 71.

Many of the options available for offers are also available for orders and work the same way (e.g. adding participants, copying records).

The following info areas are involved when adding an offer:

- Company and Person: Offers are added for companies or persons. You can determine which price lists and conditions apply to which companies.
- Offer: Offer records are store general information on the offer and are used to group the items in the offer. Offers are added in a particular language and currency, >> Offers on page 356.
- Offer Item: The items that make up the offer are added as offer items. The prices are calculated automatically based on the applicable price lists and conditions.
- Conditions: You can define discounts for individual items, for products or an entire product group. These conditions can be inherited by one company from another, >> Conditions on page 334.
- Opportunity, Property: Offers can be made within the scope of sales opportunities or relating to properties, >> Opportunities on page 345 and Properties - BTB only on page 412.

- Item Master: The item master stores basic information about individual items, >> Item Master on page 328.

- Item Master Text: This info area allows you to enter descriptions of items in various languages; the corresponding entry is transferred to offer items in the language defined in the offer, >> Item Master Text on page 330.

- Price List: You can define prices for an item (including special prices and bulk prices) in various currencies, >> Price Lists on page 331.

- Activity: You can add activities relating to an offer.

For information on individual fields, refer to the online field help.

Note: You can import order statistics in Aurea CRM win (**Order Statistics** info area) and use this data when adding orders, >> update.seven win Business Logic OTC Manual.

Offers

Any number of offers may be added for a company or person.

Note the following when adding offers:

- If you commonly add offers in various **currencies**, decide on the currency to be used by the offer. Once the offer has been saved, you can no longer edit the **Currency** field. The currency is transferred to the offer's items.

- **Prices** are calculated for the individual **offer 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 363.

  Conditions, bulk discounts and special prices must be defined before adding an order, >> Conditions on page 334 and Price Lists on page 331.
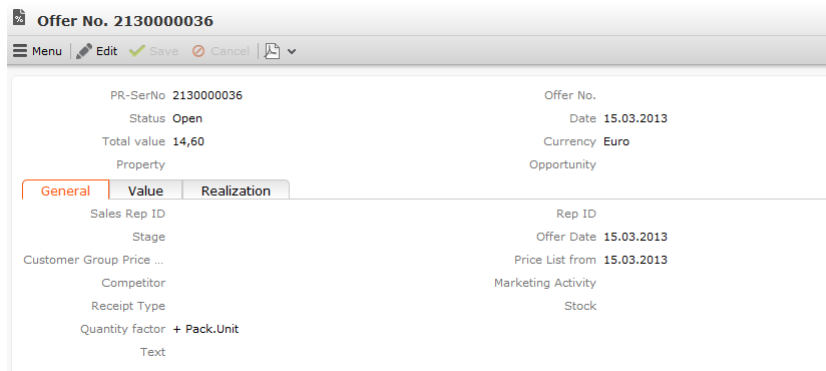
Note: Prices are only calculated for items in **offers**. If you want to calculate prices for **orders**, you first need to add an offer and then copy it to an order using the context menu.

Adding Offers

To add an offer:

1. The following options are available:

- Select ![cart] **(Sales)** > **New Offer**. Select the company or person that you wish to add the offer for.

- Switch to the desired company or person and select **New** > **New Offer** from the context menu.

Note: If a **customer group price list** exists for the selected company, this price list is entered in the offer (**Customer Group Price List** field). If no such price list exists, applicable individual price lists or country price lists are used to calculate the prices. The **Payment Conditions** and **Delivery Conditions** (**Deliv. Cond. 1** field in the offer) are transferred from the company to the offer.

---

2. Enter data that affect the value of the offer, such as the **Currency**, **Offer No.**, **Receipt Type**, **Realization Probability (%)** and any discount.

3. Save the record.

The **PR-SerNo** field (the serial number of the offer record) is entered automatically.

Calculating the Weighted Offer Value

The weighted value of the offer is calculated as follows in Aurea CRM web:

The default value for both probabilities is 100%.

Investment and Realization Probability

Aurea CRM uses two probabilities to calculate the weighted value of an offer:

- Realization probability: The probability of the customer placing an order corresponding to this offer with anyone.

- Investment probability: Probability of the customer placing an order with your company (and not with a competitor).

The default value for both probabilities is 100%.

For example, if the realization probability is 80% and the investment probability is 50%, the overall probability of closing the deal is 40% (50% of 80%).

Adding Offer Items

Use the **Offer Item** info area to enter the items that make up an offer. Prices are calculated for the individual offer items, >> Pricing on page 363.

You can either add offer items directly or select **Quick Add (Items)** from the context menu to use the quick add function, >> Quick Add on page 202.

Note: If you use the quick add function, no data is transferred from the price list (e.g. the **Selling Price**). In this case you need to enter the purchase price manually.

To add an offer item:

1. Switch to the desired offer.

2. Select **New** > **New Offer Item** or click on ⊕ (**New**) in the **Offer Items** tab.

3. Click on 🔍 (**Select**) next to the **Item No.** field to select an item. The **Item name**, **Item No.**, **Product Group** and **Product** are entered automatically.

4. Enter the quantity of the item in the **Quantity** field on the **Value** tab and the discount if applicable. The **Item Value** is automatically calculated based on the

Quantity and **Selling Price**. If suitable price lists exist, the **Selling Price** and **Item Value** are calculated automatically, >> Pricing on page 363 and Price Lists on page 331. You can manually change the **Selling Price**.

5. Enter data such as the **Business Area**, **Type** and a **Description**.

6. Save the record.

   The **Item** and **AP-SerNo** (serial number of the offer item) are entered automatically.

Note: The **Offer value** field in the offer is calculated automatically from the sum total of the value of all items (after any discounts have been applied to the items and offer). The corresponding record is either added or updated in the **Potential** info area.If a sales area has been entered in the **Offer** info area (i.e. the **Sales Organization** and **Sales Channel** fields contain values), the system checks whether there is a record in the **Sales Sector Item** info area assigned to the sales sector when the offer item is saved.

Copying Offer Data to Orders and Service Contracts

If you receive an order from a customer after submitting an offer, you can copy the data entered in the original offer to the new order or to a service contract.

To copy an offer's data to an order or service contract:

1. Switch to the desired offer.

2. Select **Copy to Order** or **Copy to Service Contract** from the context menu.

   A new record is added and the relevant data (e.g. currency, items, participants etc.) is transferred to the new record.

   If you copy an offer to an order, the status of the offer is automatically set to "Order".

Note: The context menu option is only available for company and person in company records, as an order is always added for a company.Offer items where either the **Optional item** or **Alternative item** fields are enabled are not copied.You can only generate an order from an offer once; if an offer has already been copied to an order, you cannot copy it to another order.

Orders

Orders are added for companies (not for persons) and consist of several order items. Automatic pricing is not applied to orders. If you wish to use Aurea CRM's pricing features, you need to first add an offer and copy the offer to an order by selecting **Copy to Order** from the offer's context menu, >> Copying Offer Data to Orders and Service Contracts on page 359.

If you enable the **Revenue Consolidation** check box, the order is used to consolidate the revenue of companies, >> Consolidation on page 408. In addition, orders are totaled in the **Potential**, **Forecast** and **Support** info areas, >> Sales Management on page 406.
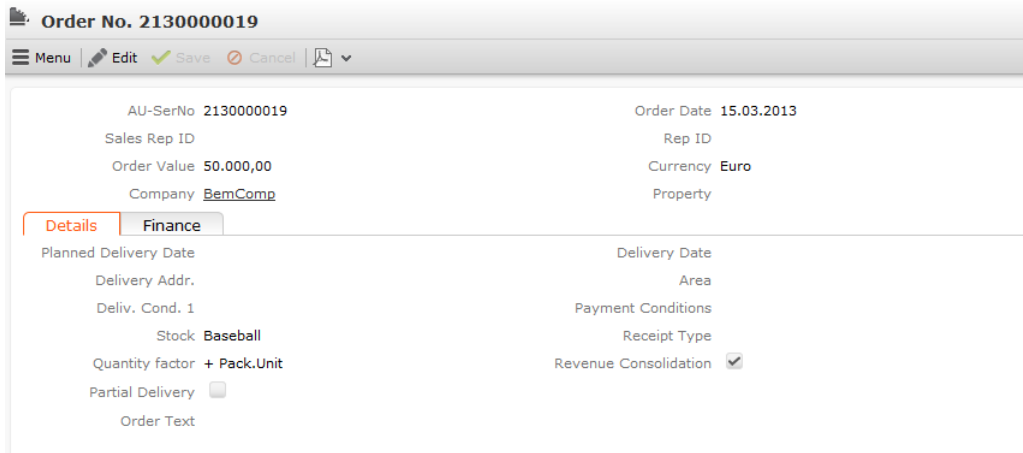
Adding Orders

Orders are always added for companies.

To add an order:

1. The following options are available:

   - Select (**Sales**) > **New Order**. Select a company.
   - Switch to the desired company and select **New** > **New Order** from the context menu.

2. Enter data such as the **Currency**, **Order Value**, **Delivery Date** etc.
3. Save the record.

   The **AU-SerNo** field (the serial number of the order record) is entered automatically.

Adding Items to Orders

The **Order Item** info area fulfills the same purpose for orders as the **Offer Item** info area does for offers. Individual items are added to an order using order item records. However prices are only calculated automatically for offer items.

You can either add order items directly or select **Quick Add (Items)** from the order's context menu to use the quick add function, >> Quick Add on page 202.

To add an order item:

1. Switch to the desired order.

2. Select **New** > **New Order Item** or click on ⊕ (**New**) on the **Order Items** tab.

3. Click on 🔍 (**Select**) next to the **Item No.** field to select an item. The **Item name**, **Item No.**, **Product Group** and **Product** are entered automatically.

4. Enter data such as the **Quantity**, **Selling Price**, **Payment Conditions** etc.

5. Save the record.

   The **Item** and **UP-SerNo** (serial number of the order item) are entered automatically.

Sales Areas

The **Sales Area** (🛒 (**Sales**) > **Sales Area**) info area defines sales areas that consist of a combination of **Sales Organization**, **Sales Channel** and **Branch**. Sales areas can be assigned to items. The combination of the **Sales Organization**, **Sales Channel** and **Branch** catalogs can be imported, meaning that this info area is relevant to integrating SAP.

You can add any number of records with a unique combination of **Sales Organization**, **Sales Channel** and **Branch.**

Benefits:

* Manage sales areas centrally

* Define sales areas that correspond to your sales structure

* Assign multiple sales areas to companies

* Assign offers and orders to a company's sales sector (Aurea CRM win only)

* Add information about partner companies and persons and assign them to company sales areas (not available in Aurea CRM web by default)

* Assign items to sales areas

Note: The **Sales Area (Item)** info area does not include the branch.If an item recorded is deleted from the item master, all records in the **Sales Area (Item)** info area added for that item are also deleted.

Sales Area (Company)

The **Sales Area (Company)** info area is a child info area of the **Company** info area, and is used to assign customers to specific sales areas. This is relevant to SAP integration.

You can assign companies to any number of sales areas you have defined in the **Sales Area** info area. When adding offers, customer-specific sales areas are then suggested.

Sales Area (Item)

The **Sales Area (Item)** info area is used to assign items to sales areas (**Sales Organization**, **Sales Channel**) and the item (**Item No.**, **Item name**, **Product Category**, **Product**).

An item's sale areas are displayed on the **Sales Area (Item)** tab in the **Item Master** info area in Aurea CRM web.

As in SAP, this info area does not include the branch (unlike the **Sales Area** info area). This means that sales sectors which only differ in the **Branch** field will be assigned to the same items.

An item can be assigned to any number of sales areas in the **Sales Area (Item)** info area, and any number of items can be assigned to the same sales area.

If the last record in the **Sales Area** info area that combines a specific combination of sales organization and sales channel is deleted, all sales area (item) records defined for that combination are also deleted.

If an item recorded is deleted from the item master, all records in the **Sales Area (Item)** info area added for that item are also deleted.

Assigning Offers/Orders to a Sales Area

You can assign offers and orders to sales areas (**Sales Organization** and **Sales Channel** fields).

When adding offer items using the quick add area, you can use the **Sales Organization** filter to restrict the display to those items assigned to the same sales area in the **Sales Area (Item)** info area.

Note:

If a sale is entered in an offer or order, you can only select items assigned to the same sales area in Aurea CRM win when adding items manually. The **Sales Area** filter is available in the quick add area.

Your administrator can deny access to the **Sales Organization**, **Sales Channel** and **Branch** fields in the **Offer** and **Order** info areas, preventing you from adding new sales areas from there.

Sales Area (Partner)

You can store partners in the **Sales Area (Partner)** info areas that are assigned to company sales areas (**Sales Area (Company)** info area; not available in Aurea CRM web by default) You can enter the partner's **Role**, e.g. supplier or wholesaler.

Note: These partner roles are **not** displayed in the **Partner Role** info area.

Sales areas and related information (e.g. whether partial deliveries are permitted) are relevant to SAP integration.

Pricing

Whenever you add an offer item, Aurea CRM calculates the **Selling Price** in the offer item.

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

The sales price offer is determined over five stages.

Note: Prices are only calculated for items in **offers**. If you wish to use Aurea CRM's pricing features for orders, you need to first add an offer and create an order from

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the offer's data, >> Copying Offer Data to Orders and Service Contracts on page 359.Your administrator can define triggers that automatically calculate prices, >> *CRM.core Administrator Guide.*

Although prices can be calculated automatically, you can enter prices manually or edit the automatically calculated price. If you enter a price manually, any automatically calculated prices are overwritten. Your administrator can however prevent you from entering prices manually (using access rights defined in the **Rights** module), >> *CRM.core Administrator Guide.*

Offer items contain fields that are used to log the results of this automatic pricing. These fields' names begin with **PF_**.

The **Price List**, **Base Price (Price List)** and **Base Price (Conditions)** fields store the price list used to calculate the price, the price in the list and the price after any discounts in the **Price List** info area are applied (special offers, bulk discounts) but prior to any discounts entered in the **Conditions** info area.

Step 1: Fixed Price for Companies and Corporate Discounts

In this step, the system checks whether a **fixed price** has been defined for the item, >> Conditions on page 334. The currency the fixed price is defined in does not matter. The price is converted to the currency entered in the offer using the exchange rate table.

If **Do not determine prices/discounts** in enabled in an offer or offer items, prices are not calculated automatically.

The following diagram illustrates the first two stages in calculating the price: The system searches for a fixed price in step1; if none is found, the price list is determined in step 2.
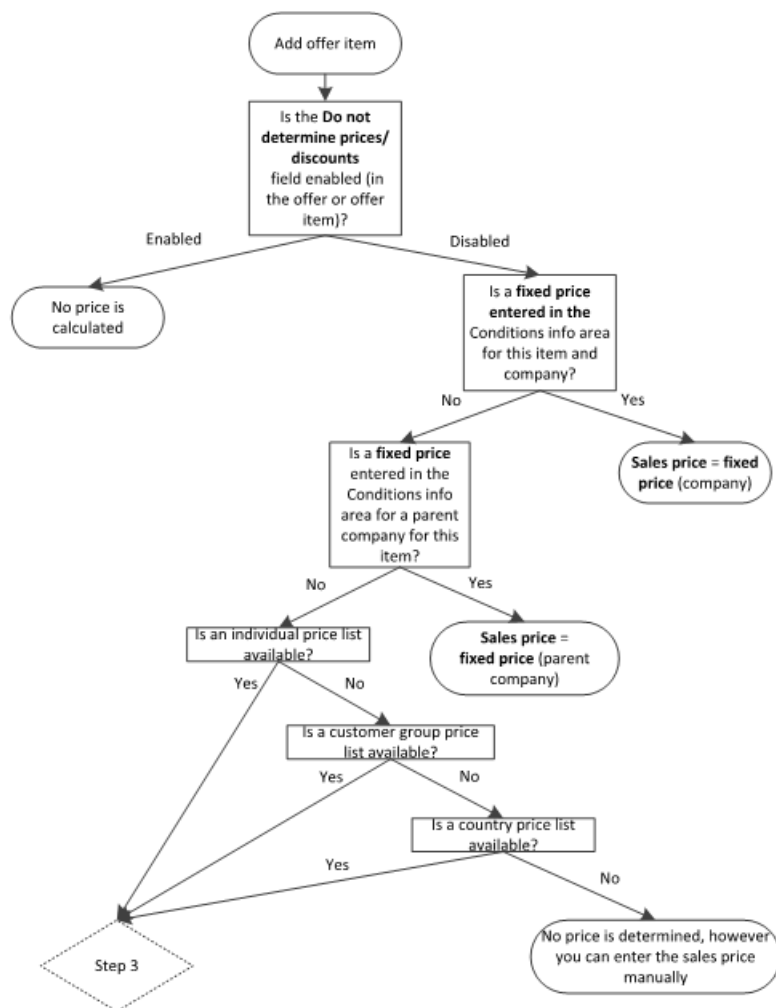
The system uses the first fixed price found in the following order:

1. The fixed price entered in the **Conditions** area **for this item and this company**

2. The fixed price entered in the **Conditions** area **for this item and a company from which discounts are inherited**

3. If no price is found, the system proceeds to step 2, >> Step 2: Determining the Price List on page 365.

Step 2: Determining the Price List

In step 2, the system tries to determine a suitable price list for each item (i.e. for all offer items). To do so, a **Currency** must be entered in the offer. Only those price lists added in the same currency are taken into consideration, >> Price Lists on page 331.

The system uses the first price list found in the following order:

1. The **individual price list** entered for the company for this item

2. The **customer group price list** entered in the offer for this item

3. The **country price list** entered for the company's country for this item

Once a price list has been found, the system proceeds to step 3, >> Step 3: Special Prices on page 366.

If no price list is found, no value is entered in the **Selling Price** field of the offer item. You can enter a **Selling Price** manually, in which case the price is not calculated automatically.

Step 3: Special Prices

In step 3, the system checks whether any special prices have been defined.

The following diagram illustrates how step 3 and 4 of calculating the price: The system determines any special prices in step 3 and any bulk prices and discounts in step 4.
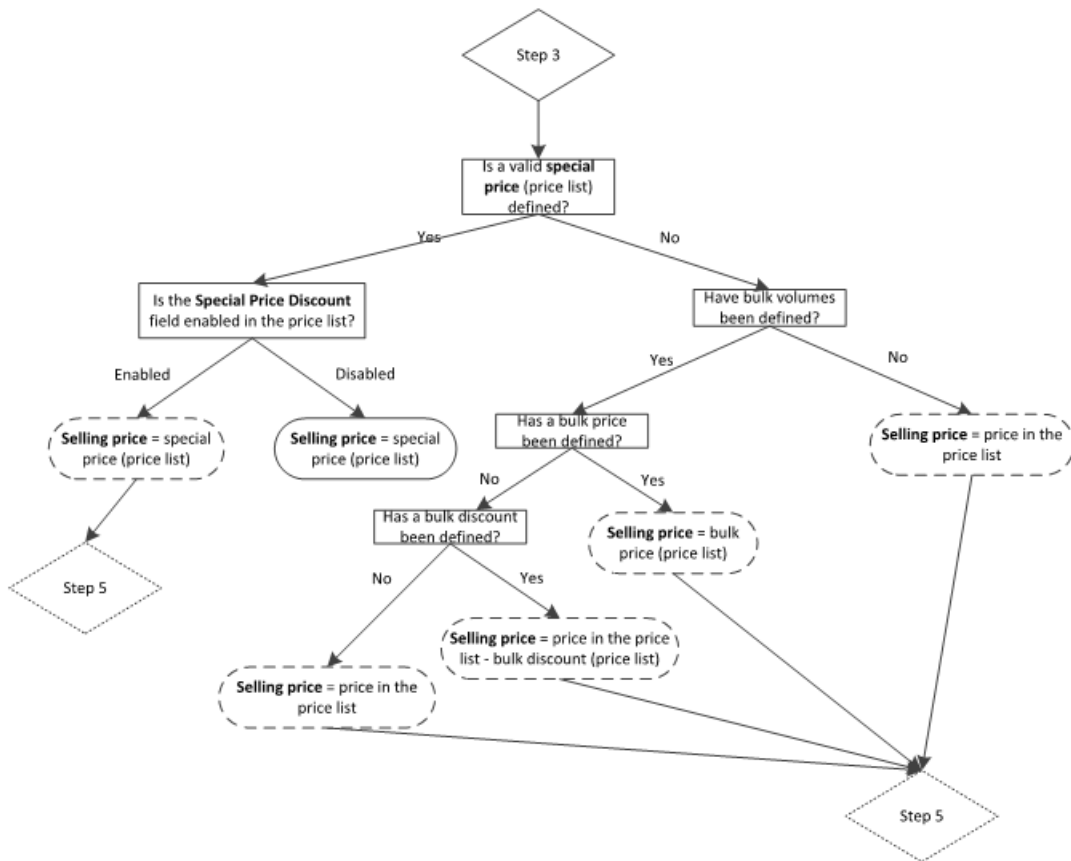
The special price is determined as follows:

1. If a **Special Price** has been defined for the item in the price list, and if the date entered in the offer is within the valid time period for the price (**Special Price Valid From/To** fields in the **Price List** info area), that price is used.

2. The system checks whether the **Special Price Discount** option has also been enabled in the price list for the item:

   • If the option is disabled, the sales price has been determined.

   • If the option is enabled, the system proceeds to step 5, >> Step 5: Discounts for Companies and Parent Corporation Discounts on page 368.

   • If no special price was found, the system proceeds to step 4, >> Step 4: Bulk Prices and Bulk Discounts on page 367.

Step 4: Bulk Prices and Bulk Discounts

In step 4, the system checks whether bulk prices have been defined that apply to the quantity entered for this item, >> Bulk Volumes on page 332.

1. The system checks whether a record exists for the item in the **Bulk Volumes** info area.

2. The smallest applicable volume price is used, i.e. where the volume entered is the same as or higher than the quantity entered. The system then checks whether a bulk price or discount has been defined in the **Price List** info area for the bulk volume.

   • If no bulk volume has been defined, the sales price in the price list is used.

   • If a price has been defined for the bulk volume, the bulk price is used.

   • If a discount has been defined for the bulk volume, the sales price defined in the price list is used and the bulk discount is applied.

   Note: If both a price and a discount are entered for a bulk volume, then the price is used.

   In all three cases, the system proceeds to step 5, >> Step 5: Discounts for Companies and Parent Corporation Discounts on page 368.

Note: If neither a bulk price nor bulk discount have been entered, the **Selling Price** in the price list is used. If no sales price has been entered in the price list, no price is entered in the offer item.

Step 5: Discounts for Companies and Parent Corporation Discounts

In step 5, the system checks whether discounts have been defined for the **item**, **product** or **product group**, either for the current company, or for a company from which conditions are inherited, >> Discounts on page 335.

These are defined in the **Conditions** info area as follows:

- **Item discount**: The item (**Item No.** field), **Product** and **Product Group** are entered in a condition record.

- **Product discount**: The **Product** and **Product Group** are entered in a condition record.

- **Product group discount**: The **Product Group** is entered in a condition record.

The following diagram illustrates step 5 of calculating the price:
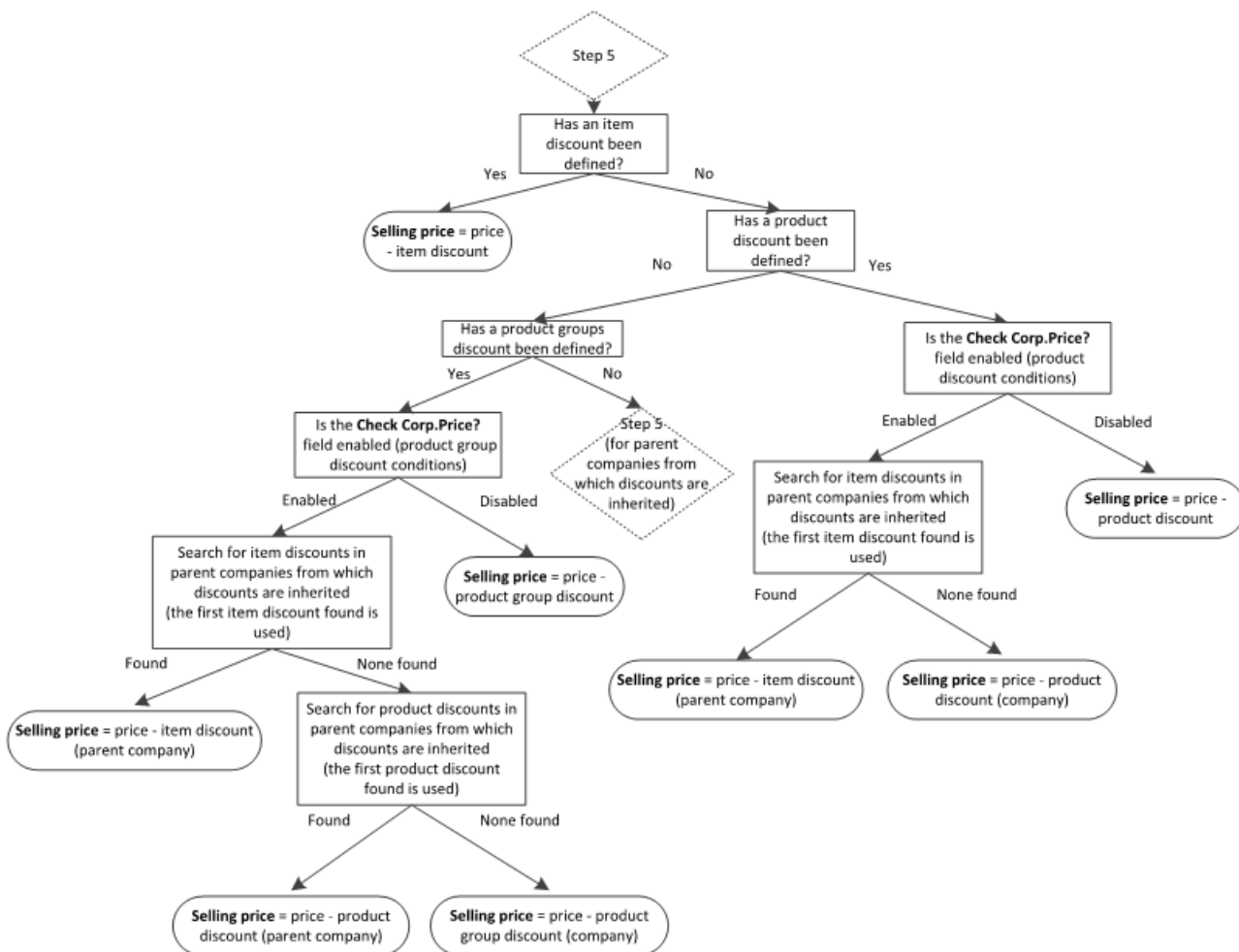
The system uses the first discount found in the following order:

1. Item discount defined for the current company: Selling price = price - item discount.

2. Otherwise the system searches for a product discount defined for the current company:

   If a condition record exists containing a product discount and the field **Check Corp.Price?** is checked, the system checks for an item discount in all parent companies from which conditions are inherited. The first item discount found is used (selling price = price - item discount defined for the parent company).

   Otherwise the price is determined based on the product discount for the company itself: Selling price = price - product discount.

3. If no product discount is found, the system searches for a product group discount defined for the company.

   If a condition record exists containing a product group discount and the **Check Corp.Price?** field is enabled, the system checks for an item discount in all parent companies from which conditions are inherited. The first item discount found is used (selling price = price - item discount defined for the parent company). If no item discount is found, the system searches for a product discount in all parent companies from which conditions are inherited (selling price = price - product discount defined for the parent company).

   Otherwise the price is determined based on the product group discount for the company itself: Selling price = price - product group discount.

If no discount can be found, steps 1 to 3 are repeated for all parent companies in the hierarchy from which conditions are inherited.

If no discount is found for the parent companies from which conditions are inherited, the sales price determined in step or 4 is entered in the offer item record.

For details on the order in which conditions are applied, >> Order in Which Conditions are Applied on page 336.

10

Inventory Management

Inventory management allows you to manage your items and products. Outgoing items can be deducted from stocks in the "central warehouse" (an external ERP system).

Your administrator can configure Aurea CRM's inventory management to meet your company's specific needs: Stocks can be added or updated automatically or manually, transactions can be represented using either positive or negative numbers, calculations can be carried out using single units or packaging units etc.

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

Overview

Inventory management supports the following functions:

- Every rep can add various **stocks** for each item, >> Adding Stocks on page 374.

- Various types of transactions can be entered, e.g. items removed from the central warehouse, returns, losses etc, >> Adding Stock Control Records on page 376.

- You can determine whether **stocks are affected** by offers and orders, >> Orders and Stocks on page 380 and Records with no Effect on Stocks on page 382.

- The current **stock** is calculated automatically based on stock control and stock control item records, providing you with information on the quantity of a particular item in stock, >> Adding Stocks on page 374.

- All changes to stocks are logged in the **stock history**, >> Stock History on page 375.

- You can define various transaction types (e.g. order, return, delivery, loss etc.) for orders and stocks, used to determine how **stocks are affected**. For each transaction type, you can determine whether stocks are decreased or increased and whether the quantities are entered in terms of units or packaging units, >> Quantity Factors on page 377.

- You can assign stocks to **SAP company codes** in the **SAP Company Code** info area for use with SAP, >> Assigning Stocks to an SAP Company Code on page 379.

- The stock-taking function calculates the current stock by aggregating all stock-relevant data (in orders and inventory management) for each rep, stock and item. The results are written to the **Stock Control** info area, >> Stocktaking on page 385.

During stock-taking, stock-relevant data in existing orders is taken into account; during the process, the items in these orders are then set as no longer affecting stocks (**No effect on stock** field). If you edit or delete these orders after completing stock-keeping, your changes no longer affect current stocks.

	Note: Your administrator can determine (in Aurea CRM win) how Aurea CRM behaves if a transaction exceeds current stock levels, e.g. display a warning message, or permit negative stocks, >> Exceeding Stocks on page 382.

Administrator Information:

Depending on how the inventory management features are used in your company, your administrator must configure the following options:

- Automatic stocktaking and stock calculations are **disabled by default.** In order to use the inventory management features, the "Inventory Calculations" CRM process needs to be activated in the **CRM Process Configuration** info area, >> *CRM.core Administrator Guide.*

- To use Aurea CRM's stock management features in a distributed system, all info areas containing stock-relevant data (**Stock Control**, **Order** etc.) must be **communicated**, >> Aurea CRM win Administrator Guide.

- The **Stock Control** info area requires all stock-related data to be present on branch offices in order to correctly track stocks. For this reason, records (e.g. companies) for which stock-relevant data exists for reps assigned to the station (**Stat.No.** field in the **Rep** info area) are not deleted by the **synchronization** process.

  Use the **No Inventory** configuration entry (**Communication** category) to disable this behavior, >> *CRM.core Administrator Guide.* Alternatively, you can disable Aurea CRM's stock management features across the entire system by locking the "Inventory Calculations" process (recommended method).

- By default, stocktaking (**Stocktaking** and **Reset** options) can only be carried out on the main office. Use the **Take inventory** configuration entry (**Inventory** category) to allow stocktaking on other stations (possibly restricted to certain reps or groups), >> *CRM.core*

	Administrator Guide.

Adding Stocks

Use the **Stock** info area to manage various stocks for each rep and item. When a rep removes goods from storage, their personal stock increases; when a rep distributes goods, their personal stock is decreased. This allows reps to sell items or hand out samples from their personal stock.

If a stock-relevant stock control item or order item is added, Aurea CRM automatically adds a record for the corresponding rep, stock and item in the **Stock** info area. Whenever changes are made, the system automatically calculates the quantity of items available and in which stock. Changes are logged in the stock history, >> Stock History on page 375.

Items can also be distributed without affecting stocks, in which case the rep's stock remains unchanged, >> Records with no Effect on Stocks on page 382.

Stocks are **always** counted in units (**Quantity Unit** field). The available packages and remaining units are calculated as follows:

- **Quantity Unit:** Quantities entered in stock control item and order item records are added/subtracted in units.
- **Target number of packs:** Number of packages available according to the database (**Quantity Unit** / **Packaging Unit**)
- **Target remainder units:** Number of remainder units available according to the database (**Quantity Unit** - (**Packaging Unit** * **Target number of packs**))

Use the **No Restrics.** (no restrictions) and **Negative stock allowed** (negative stocks allowed) fields to determine how the system behaves if stocks are exceeded, >> Exceeding Stocks on page 382.

To manually add a stock:

1. Select 🛒 (**Sales**) > **Stock**.

2. Start the search.

3. Click on ⊕ (**New**).

4. Enter data such as the **Rep ID**, **Stock**, **Item No.** etc.

5. Save the record.

Stock History

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

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

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

The following changes are recorded:

• Changes resulting from new or edited order items and stock control items

• If quantities were changes as the result of deleting an order item or stock control item record, the **Deleted** check box is enabled in the history record.

• When stock-taking using the **Reset** option, the selected data is removed from stocks, >> Reset on page 384. In this case, the link in the stock history accesses the edited stock records where the type and date of the stock-taking is entered. In addition, the **Stocktaking** check box is enabled in the corresponding stock history records.

All other stocktaking types are not recorded in the **Stock History** info area, as they do not affect stocks.

Adding Stock Control Records

The **Stock Control** info area allows you to enter goods removed from or returned to storage for each rep (warehouse management). The individual items removed or returned are stored in stock control item records.

1. Select the rep (**Rep ID** field) you want to enter the record for. By default, you are automatically entered.

2. Select the **Stock** that the record applies to, e.g. stationery, car tires etc.

3. Select the type of transaction in the **Stock Receipt Type** field, e.g. withdrawal, return, defective, loss etc.

4. Choose the desired quantity factor in the **Quantity factor** field. The quantity factor determines how the stock control items affect stocks, i.e. whether stocks are increased or decreased, and whether quantities are specified in individual units (**+ Qty**, **- Qty**) or packaging units (**+ Pack.Unit**, **- Pack.Unit**).

   Note: You can assign a fixed quantity factor to the transaction types in the **Stock Transaction Type** info area. If you enter a transaction type in the **Stock Control** info area, the quantity factor is then entered automatically, >> Quantity Factors

5. Save the record.

Note: Aurea CRM automatically adds a stock record to the **Stock** info area based on the data you entered (stock control and stock control items) for each rep, stock and item. If changes are made to the records, the stocks are updated automatically and the changes are stored in the stock history.

Adding Stock Control Item Records

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

To add a stock control item record:

1. Switch to the stock control record you wish to add the stock control item record for.

2. Click on ⊕ (**New**) on the **Stock Control Items** tab.

3. Enter the **Item No.** or click on 🔍 (**Select**) to select an item.

   The **Product** and **Product Group** fields are filled in automatically.

4. Enter the item's quantity in the **Quantity** field to determine the amount to be added or removed from the stock.

5. Enter the packaging unit in the **Packaging Unit** field.

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

6. Save the record.

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

Quantity Factors

The quantity factor determines how stock control items or order items affect stocks. You can assign specific quantity factors to records in the **Stock Transaction Type** and **Receipt Transaction Type** info areas, >> Assigning Quantity Factors to Transaction Types on page 378 and Assigning Quantity Factors to Receipt Transaction Types on page 379.

The following quantity factors are available:

- **+ Pack.Unit:** Quantities entered are multiplied by the packaging unit and added to stocks.

- **- Pack.Unit:** Quantities entered are multiplied by the packaging unit and subtracted from stocks.

- **+ Qty:** Quantities entered are added to stocks as individual units.

- **- Qty:** Quantities entered are subtracted from stocks as individual units.

- **0:** The quantity entered has no effect on stocks.

Note: Packaging units can be defined in the item master. They are automatically entered in stock control items records once an item has been selected.

Quantity Factor 0

The quantity factor '0' can be used to enter delivered goods into the system that should subsequently be verified. Stock control and item records can be added using a receipt type that does not affect stocks (e.g. "Goods order" with the quantity factor '0'). The rep responsible for the stock can then compare the quantities entered in the system with the actual quantities received, and then change the receipt type, e.g. to "Goods delivery" with the quantity factor "+ Qty". Only at this point are the stocks updated in Aurea CRM.

If you then select a **Stock Receipt Type** or **Receipt Type** in the **Stock Control** or **Order** info areas, the corresponding **Quantity factor** is entered.

The stock control records added automatically for the current rep within the scope of stock-taking use the quantity factor '0', >> Stocktaking on page 385.

Assigning Quantity Factors to Transaction Types

You can assign a fixed quantity factor to the transaction types in the **Stock Transaction Type** info area. The quantity factor determines how stock control items affect stocks.

If you select a transaction type in the **Stock Receipt Type** field in the **Stock Control** info area, the corresponding quantity factor is entered automatically.

To add a stock transaction type record:

1. Select (**Sales**) > **Stock Transaction Type**.
2. Start the search.
3. Click on ⊕ (**New**).

4. Select the transaction type in the **Stock Receipt Type** field and assign a **Quantity factor**.

5. Save the record.

Assigning Quantity Factors to Receipt Transaction Types

You can assign a quantity factor to the default transaction types in the **Receipt Transaction Type** info area. This info area is otherwise identical in function to the **Stock Receipt Type** info area, >> Assigning Quantity Factors to Transaction Types on page 378.

For example, if you enter a receipt type in an order, the corresponding quantity factor is entered automatically. Packaging units are defined in the item master and transferred to order items once an item has been selected, >> Orders and Stocks on page 380.

To add a receipt transaction type:

1. Select (**Sales**) > **Receipt Transaction Type**.

2. Start the search.

3. Click on ⊕ (**New**).

4. Select the transaction type in the **Receipt Type** field and assign a **Quantity factor**.

5. Save the record.

Assigning Stocks to an SAP Company Code

You can assign stocks to **SAP company codes** in the **SAP Company Code** info area for use with SAP. You can assign multiple stocks to the same company code.

To assign a stock to a company code:

1. Select (**Sales**) > **Stock SAP Company Code**.

2. Start the search.

3. Click on ⊕ (**New**).

4. Select the **Stock** and enter the **SAP Company Code**.

5. Save the record.

If you then select a **Stock** in the **Stock**, **Stock Control** and **Order** info areas, the corresponding **SAP Company Code** is entered.

Orders and Stocks

If your administrator has activated the inventory management process, data entered in orders also affects stocks. Stock-relevant information entered in orders and order item records is applied to stocks. Aurea CRM automatically calculates changes to quantities per rep, stock and item, >> Adding Stocks on page 374.

Note: Offers do **not** affect stocks. However, you can enter stock-relevant data in offers and offer items (stock, transaction type, quantity factor etc.). This information is then transferred to the corresponding order and order items. When adding the order, this data is taken into account when calculating stocks and in the history.

To add an order that affects stocks:

1. Add a new order, >> Orders on page 360.

Note: If you wish to use Aurea CRM's pricing features, you need to first add an offer and copy the offer to an order, >> Copying Offer Data to Orders and Service Contracts on page 359. You can add stock-relevant information in the offer or subsequently in the order.

2. Enter the **Sales Rep ID** whose stocks should be affected by the order.

3. Select the **Stock** affected by the order.

4. Select a transaction type from the **Receipt Type** field or enter a **Quantity factor**, >> Quantity Factors on page 377.

5. Add the desired order items, >> Adding Items to Orders on page 361.

6. Enter the **Quantity**.

Note: If you copy an offer and its items to an order, and then change the quantities in the order items, this affects stocks. However prices are not automatically updated.

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7. Save the record.

The rep's stock is automatically updated. A new record is added to the stock history, with a link to the order item record, >> Stock History on page 375.

Records with no Effect on Stocks

You can determine that items, offer items, order items and stock control items have no effect on stocks. These item records are ignored when stock-taking, >> Stocktaking on page 385.

Note:

- If the **No effect on stock** field in the item master is enabled, the item never affects stocks (e.g. for an item corresponding to "work hours" used to store time expenditure). This setting is automatically applied to offer and order items (but not to stock control items).

- You can enable or disable the check box as required in offer item, order item and stock control item records.

- If you cancel an order (**Status** = "Cancelation"), the **No effect on stock** option is automatically enabled for the order items.

- Once stock-taking has been performed for order and stock control items (**Stocktaking** and **Reset** options), the **No effect on stock** check box is enabled automatically.

- Stock control items added as part of stock-taking are also flagged as having no effect on stocks, >> Stocktaking on page 385.

Exceeding Stocks

For each stock, you can use the **No Restrics.** and **Negative stock allowed** allowed fields to determine how Aurea CRM handles cases where stocks are exceeded:

- **No Restrics.** and **Negative stock allowed** enabled: Aurea CRM ignores cases where stocks are exceeded, and stocks may be negative.

- **No Restrics.** disabled and **Negative stock allowed** enabled: Aurea CRM does not output a message when saving the record if stocks are exceeded. The order item record can be saved.

- Both **No Restrics.** and **Negative stock allowed** disabled: Aurea CRM displays a corresponding message and the record cannot be saved.

Stocktaking

Aurea CRM's inventory management includes a stock-taking function: Quantities entered in order item and stock control item records that affect stocks can be totaled over a specific time period or for archiving purposes, and current stocks can be re-calculated or reset. Stocktaking can be performed for certain reps and stocks and you can restrict the records to be taken into account using conditions.

By default, stocktaking (**Stocktaking** and **Reset** options) can only be carried out on the main office. Your administrator can however determine that stock-taking can be carried out on other stations.

	Before you can begin stock-taking in Aurea CRM web, your administrator needs to define **stock-taking formats** in Aurea CRM win, >> Stocktaking Format on page 386. A stock-taking format determines which stocks are taken into account, which reps are affected, which function (count, reset, stocktaking, calculate) should be performed etc. Your administrator can also define conditions applied to this calculation

Stocktaking

To carry out stocktaking:

1. Select (**Sales**) > **Stock Taking**.

2. Select a stock-taking format.

3. Click on **Load**.

4. Restrict the stock-taking time period using the **Date from** and **Date to** fields.

5. Enter a **Text**.

   The text is transferred to stock control records (**Text** field).

6. Click on **OK**.

   Stocks are taken using the specified settings.

Note: You can enter the **Rep** that stocks are counted for (not implemented in Aurea CRM web by default), >> Stocktaking Format on page 386 and To-Do type 4 in the To-Do Types chapter of the *CRM.core Administrator Guide.*

Count

The **Count** inventory type calculates sum totals for the selected data. This allows you to determine stocks for a specific time period ("snapshot").

The results are written to the **Stock Control** info area. The following records are added:

- One record for the rep that started the stocktaking process
- One record for each rep and stock affected by stocktaking: The sum totals calculated for each item are entered in the corresponding item records, i.e. the stocks at the selected point in time. These item records are flagged as having **No effect on stock** as they are purely for informational purposes and do not impact on stocks themselves.

The **Count** inventory type can be used by reps on any station; the order items and stock control items included in the process continue to affect stocks.

Reset

The **Reset** inventory type removes the selected data from stocks. This allows you to set particular stocks to '0', for example. All order item and stock control item records taken into account by the process are flagged as having **No effect on stock**; the corresponding quantities are subtracted from stocks.

The process is documented in the **Stock Control** info area. The following records are added:

- One record for the rep that started the stocktaking process: This record's key is entered in the order items and stock control items taken into account by the stocktaking process, and any stock control items added as a result.
- One record for each rep and stock affected by stocktaking: The child item records contain the quantity subtracted from the corresponding stock. These items are flagged as having **No effect on stock**, as they are purely for informational purposes.

By default, the **Reset** inventory type can only be carried out on the main office. Use the **Take inventory** configuration entry (**Inventory** category) to allow stocktaking on other stations (possibly restricted to certain reps or groups), >> *CRM.core Administrator Guide*.

Stocktaking

The **Stocktaking** inventory type calculates the sum total for the selected data and adds new records to the **Stock Control** info area containing these sum totals. All order item and stock control item records taken into account by the process are flagged as having **No effect on stock**. This allows you to archive stocks: The affected stocks do not change, stock transactions are summarized in the new (stock-effective) records; "old" orders and stock control records can then be archived and removed from the database.

The following records are added to the **Stock Control** info area:

• One record for the rep that started the stocktaking process: This record's key is entered in the order items and stock control items taken into account by the stocktaking process, and any stock control items added as a result.

• One record for each rep and stock affected by stocktaking: The sum totals calculated for each item are entered in the corresponding item records. These item records impact on stocks and thus replace the order items and stock control items taken into account by the stocktaking process.

The **Stocktaking** inventory type can only be carried out on the main office. Use the **Take inventory** configuration entry (**Inventory** category) to allow stocktaking on other stations (possibly restricted to certain reps or groups), >> *CRM.core Administrator Guide*.

Calculate

The **Calculate** inventory type recalculates the quantities of the selected stocks based on the data available **locally**. The results are written to the **Quantity Unit** (number of units), **Target number of packs** (number of complete packages) and **Target remainder units** (remaining units not making up a full pack) fields in the affected stock records. No new stock control records are added.

You can only restrict data by **Employee**, **Stock** and **Item No.** (**Condition Item Master** tab) when using the **Calculate** inventory type; you cannot enter a **Date** or **Text**, >> Stocktaking Format on page 386.

The **Calculate** inventory type is purely for informational purposes. It can be carried out by all reps on all stations; the order items and stock control items included in the process continue to affect stocks.

Reps can compare the results to their actual physical stocks by entering their actual stocks in the **Quantity of Counted Basic Units**, **Number of packages counted** and **Remainder units counted** fields.

Stocktaking Format

🖥️	Stocktaking formats can only be created in Aurea CRM win. Define the desired settings and save the settings as a format.

To define a stocktaking format:

1. Switch to the **Stock** info area.

2. Select **Stocktaking** from the context menu.

   The **Stocktaking** dialog opens.
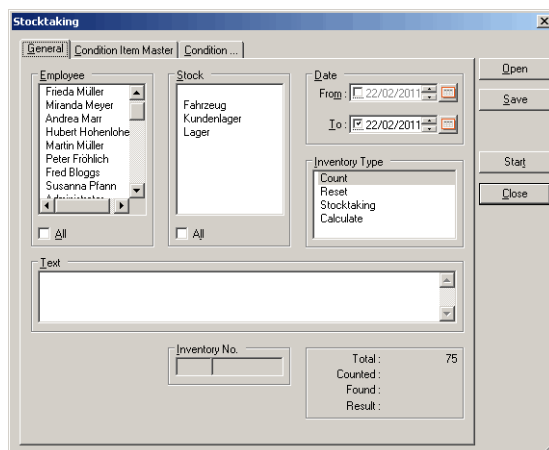
3. Select the reps whose stocks should be included from the **Employee** list, or enable the **All** check box to include the stocks of all reps.

4. Select the stocks to be included from the **Stock** list, or enable the **All** check box to include all stocks.

5. Enter the stocktaking time period in the **Date** pane.

6. Select the desired **Inventory Type**:

   • **Count:** Calculates stocks for the specified time period, >> Count on page 384.

   • **Reset:** Removes the selected data from stocks, >> Reset on page 384.

   • **Stocktaking:** Writes stocks to stock archives, >> Stocktaking on page 385.

   • **Calculate:** Recalculates stocks, >> Calculate on page 385.

Note: By default, stocktaking (**Stocktaking** and **Reset** options) can only be carried out on the main office. Use the **Take inventory** configuration entry

(**Inventory** category) to allow stocktaking on other stations (possibly restricted to certain reps or groups), >> *CRM.core Administrator Guide*.

7. You can enter information on stocktaking in the **Text** field. This text is written to stock control records created within the scope of stocktaking.

8. Use the **Condition Item Master** tab to define conditions used to restrict stocktaking to certain items or product groups:

   a. Select one or more **Product Group**(s).

   b. Click on **Load Item** to load the corresponding items.

   c. Select the desired items in the list.

9. Use the **Condition** tab to restrict stocktaking using conditions applied to the **Order** and/or **Stock Control** info areas:

   a. Click on ▼ (**Condition**) next to the desired info area.

   b. Define the condition, >> Conditions in the Aurea CRM win User Guide.

   c. Enable the **Active** check box to activate the condition.

   Note: Only conditions defined here are applied when taking stocks. Conditions applied to other other info areas, e.g. **Order**, are **ignored**. You can only restrict data by **Employee**, **Stock** and **Item No.** (**Condition Item Master** tab) when using the **Calculate** inventory type; you cannot enter a **Date** or **Text**.

10. Click on **Save** to save your settings as a format. (Click on **Open** to load an existing format.)

11. Click on **Close** to close the **Stocktaking** dialog.

All criteria (**Employee**, **Stock**, **Date** and any additional conditions) are combined using a logical AND when stocktaking. All order items and stock control items that affect stocks and meet the defined criteria are taken into account.

The results of stocktaking are recorded in the **Stock Control** info area. The following records are added:

- A record with the **Quantity factor** '0' for the rep that started the stocktaking process: The key of this record is displayed in the **Inventory No.** field in the **Stocktaking** dialog and entered in all items included in the stocktaking or added by the process.

- A record with the **Quantity factor** '+ Qty' for each rep and stock affected by stocktaking: the corresponding item records contain the sum totals calculated.

Note: No new stock control records are added when using the **Calculate** inventory type, >> Calculate on page 385. If errors occur or the system crashes while stocktaking, causing inconsistent data, the process must be reset and repeated using the **Aurea CRM** info area (**Maintenance** module) to update the **Order Item** and **Stock Control Item** info areas using the **Inventory StNo.** and **Inventory No.** fields, >> *CRM.core Administrator Guide*.

Stocktaking can be carried out in Aurea CRM web using To-Dos (type 4) assigned to CRM.server, >> *CRM.core Administrator Guide*.

11

Territory Management - BTB only

Learn how to assign sales rep and account managers to specific sales territories and manage them.

Note: This topic is relevant only for Business Logic - BTB

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

Note: You can also use the City and Allocation info areas to assign field reps, >> City and Allocation Info Areas on page 399. However, these info areas are not included in Aurea CRM web by default.

You can generate sales groups and property manager records automatically. See below:

Sales Territory Management

Use the **Sales Territory Management** info area to enter the reps responsible for a territory and to determine their function (e.g. technical support, account manager).

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

To add a sales territory management record:

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

4. Enter the **Country**.

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

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

6. Enable the **Valid for companies/Persons in Company/Properties** options to determine which info areas the settings are applied to.

7. Select the rep, company or person responsible for the territory from the **Internal Rep ID**, **Supporting Company** or **Supporting Person** field. This can be an internal rep or group, or an external company or person.

8. Save.

Applying the Sales Territory Management Settings

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

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

To apply the settings:

Select (**Sales**) > **Calculate Territory Allocation**, the sales territory management settings are applied. Sales groups and property manager records are added or updated.

Sales groups or property manager records can subsequently be edited manually.

Note: A CRM.server To-Do of type 12 is created for the applicable info area (e.g. 12, FI, KP, OJ). Enter the info areas in the `Sales.TerritoryManagement.InfoAreas` web configuration parameter. The access rights defined for the user who accessed the function apply when assigning reps, see *CRM.core Administrator Guide* and *Aurea CRM web Administrator Guide*.

Automatically Generated Records

Based on your territory management settings, records are added automatically in the following cases:

* When adding or editing company/person/property records (e.g. changing the postal code), sales groups and property manager records are automatically added or updated.
* The allocation is also updated when importing data and applying mass updates.

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

For more information, see Territory Management (**Variable Copied Fields** option) in the Configuration Settings chapter of the *CRM.core Administrator Guide*.

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

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

Sales groups assigned to a company are displayed in the **Sales Group** tab in the company record. To display the sales groups assigned to a person, select **Go to All Related** > **All Sales Groups** from the person's context menu. The property manager records for a property are displayed in the **Property Manager** tab.

Verifying that Reps are Allocated

You can check whether companies or properties exist to which no reps are allocated.

To verify the allocation settings:

1. Select (**Sales**) > **Companies without Allocation** or **Properties without Allocation**.
2. Click on **Start Query**.

   All companies or properties for which no valid sales territory management settings exist are listed.

3. If the list contains companies or properties that should have reps allocated, verify your sales territory management settings, and correct them as required.
4. Apply the sales territory management settings again.

Adding Sales Groups

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

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

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

To add a sales group:

1. Switch to the desired company or person record.

2. Select **Go to All Related** > **All Sales Groups** from the context menu. The sales groups search mask is displayed, and any sales groups already allocated are listed.

3. Click on ⊕ (**New**).

4. Enter data such as the **Business Area**, **Management Function**, **Rep ID** etc.

5. Save.

Note: You can enter visit and telephone frequencies in Aurea CRM win that allow you to automatically generate activities for customers over a specific time period, >> Generating Contacts in the update.seven win Business Logic BTB manual.

Adding Property Managers

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

Adding and updating property managers based on the defined settings functions in the same way as adding and updating sales groups, >> Sales Territory Management on page 394 and Adding Sales Groups on page 397.

Switch to the desired property and click on ⊕ in the **Property Manager** tab to add a new property manager.

Administrator Information

Deactivating Individual Functions

Your administrator can determine whether data is automatically transferred and whether sales groups and property managers are added or updated whenever address data is updated (e.g. edited manually, imported or when applying changes in the Maintenance module).

- Use the **Disconnect Fields from City Table** and **Disconnect Fields from Country Table** configuration entries to prevent fields from being filled in automatically when a country and postal code are entered. You can deactivate the transfer for each individual field and info area.

- Use the **Disable sales group from the Allocation table** configuration entry to prevent data being transferred from the **Allocation** info area when adding new sales groups.

- Automatically allocating reps based on data in the **Allocation** info area can be completely disabled in the access rights (**Deny Access** to the info area). However, this negatively affects performance.

- You can prevent sales group and property manager records from being created or updated automatically based on the data in the **Sales Territory Management** info area in the **CRM Process configuration** info area:

  - "Use sales territory management when importing"/"Use sales territory management in the Maintenance module": If access to these processes is denied, no sales group or property manager records are added or updated when importing data or updating data in the Maintenance module.

  - "Sales Territory Management" process: If access to this process is denied, assigning reps based on the settings in the **Sales Territory Management** info area is disabled completely. (If you are not using the **Sales Territory Management** info area at all, update recommends denying access to this process for performance reasons.)

Import Behavior

When importing **companies, persons (PE) and properties**, the responsible reps are determined in the following order:

1. Entries in the **City** or **Allocation** info area.

> **Note:** If data has been entered in both the **City and Allocation** info area, the entries in the **Allocation** info area are used, even if the rep fields are empty.

2. If the imported companies, persons and properties also match criteria defined in the **Sales Territory Management** info area, corresponding sales groups or property manager records are added during the import process.

3. If new sales group records are added when importing companies and persons, the system also checks for matching data in the **Allocation** info area: If matching allocation records are found, fields are transferred to the sales group if the corresponding fields in the sales group record are empty.

If existing company, person or property records are changed by the import, reps are only transferred from the **Allocation** info area if the corresponding rep fields in the **Company**, **Person** or **Property** info areas are empty. Previously assigned reps are not overwritten by the import.

When importing **persons (KP)**, the responsible reps are determined as follows:

1. If the imported persons also match criteria defined in the **Sales Territory Management info area, corresponding person-related sales groups are added during the import process.**

2. If new sales group records are added when importing persons, the system also checks for matching data in the **Allocation** info area: If matching allocation records are found, fields are transferred to the sales group if the corresponding fields in the sales group record are empty.

When importing **sales groups**, the responsible reps are determined based on the data in the **Allocation** info area as follows:

If existing sales group **or property manage** records are changed by the import, reps are only transferred from the **Allocation** info area if the corresponding rep fields in the **Sales Group** or **Property Manager** info areas are empty. Previously assigned reps are not overwritten by the import.

Sales Territory Management

Use the **Sales Territory Management** info area to enter the reps responsible for a territory and to determine their function (e.g. technical support, account manager).

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

To add a sales territory management record:

1. Select (**Sales**) > **Sales Territory Management**.

2. Start the search.

3. Click on ⊕ (**New**).

4. Enter the **Country**.

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

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

6. Enable the **Valid for companies/Persons in Company/Properties** options to determine which info areas the settings are applied to.

7. Select the rep, company or person responsible for the territory from the **Internal Rep ID**, **Supporting Company** or **Supporting Person** field. This can be an internal rep or group, or an external company or person.

8. Save.

Applying the Sales Territory Management Settings

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

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

To apply the settings:

1. Select (**Sales**) > **Calculate Territory Allocation**.

   The sales territory management settings are applied. Sales groups and property manager records are added or updated.

Sales groups or property manager records can subsequently be edited manually.

Note: A CRM.server To-Do of type 12 is created for the applicable info area (e.g. 12, FI, KP, OJ). Enter the info areas in the `Sales.TerritoryManagement.InfoAreas` web configuration parameter. The access rights defined for the user who accessed the function apply when assigning reps, >> *CRM.core Administrator Guide* and *Aurea CRM web Administrator Guide*.

Automatically Generated Records

Based on your territory management settings, records are added automatically in the following cases:

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

- The allocation is also updated when importing data and applying mass updates.

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

For more information, >> Territory Management (**Variable Copied Fields** option) in the Configuration Settings chapter of the *CRM.core Administrator Guide*.

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

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

Sales groups assigned to a company are displayed in the **Sales Group** tab in the company record. To display the sales groups assigned to a person, select **Go to All Related** > **All Sales Groups** from the person's context menu. The property manager records for a property are displayed in the **Property Manager** tab.

Verifying that Reps are Allocated

You can check whether companies or properties exist to which no reps are allocated.

To verify the allocation settings:

1. Select (**Sales**) > **Companies without Allocation** or **Properties without Allocation**.

2. Click on **Start Query**.

   All companies or properties for which no valid sales territory management settings exist are listed.

3. If the list contains companies or properties that should have reps allocated, verify your sales territory management settings, and correct them as required.

4. Apply the sales territory management settings again.

Adding Sales Groups

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

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

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

To add a sales group:

1. Switch to the desired company or person record.

2. Select **Go to All Related** > **All Sales Groups** from the context menu. The sales groups search mask is displayed, and any sales groups already allocated are listed.

3. Click on ⊕ (**New**).

4. Enter data such as the **Business Area**, **Management Function**, **Rep ID** etc.

5. Save.

Note: You can enter visit and telephone frequencies in Aurea CRM win that allow you to automatically generate activities for customers over a specific time period, >> Generating Contacts in the update.seven win Business Logic BTB manual.

Adding Property Managers

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

Adding and updating property managers based on the defined settings functions in the same way as adding and updating sales groups, >> Sales Territory Management on page 394 and Adding Sales Groups on page 397.

Switch to the desired property and click on ⊕ in the **Property Manager** tab to add a new property manager.

City and Allocation Info Areas

Learn how to assign Reps to customers based on the entries in the **City** and **Allocation** info areas.

Note: The following chapters describe the CRM.core business logic.

For details on assigning reps based on sales territories, see Sales Territory Management on page 394.

- **City** info area: Up to 2 reps can be allocated to each postal code range. These reps are transferred to records in the **Company**, **Person** or **Property** info areas whenever a new record is added or an existing record is edited, see City/Country on page 248 and *CRM.core Administrator Guide*. Other data entered in this info area is also transferred, see Transferring Area-dependent Information.

    If you add a person in company (KP) record and enter an address (**Country**, **Postal Code**), the reps entered in the **Rep 1** and **Rep 2** in the **City** info area are transferred to the **Private rep** and **Private back office** fields in the person in company (KP) record. The reps are entered in the **Rep** and **Office Rep** fields in the person (PE) associated with the company in person (KP) record.

- **Allocation** info area: Up to 5 reps can be allocated to each postal code range. These reps are transferred to records in the **Company**, **Person** or **Property** info areas whenever a new record is added or an existing record is edited. Note that only 4 reps are transferred to properties. If you enter a product group or business area in an allocation record, up to 10 reps in the allocation record can be transferred to matching sales group records for companies or persons whenever address data is entered or edited, see Allocation Info Area. Other data entered in this info area is also transferred, see Transferring Area-dependent Information.

    Sales group records cannot be added for properties.

Note: Changes to data in the **Country**, **City** and **Allocation** info areas are not automatically applied to existing company, person and property records.

When adding a new company or person, the system searches for a matching record in the **Allocation** info area. If no matching record is found, the system searches for a matching record in the **City** info area. The reps entered in the matching record are automatically transferred to the new company or person.

Your administrator can disable functions that are not required to prevent undesired results, see Administration Information.

Allocation Info Area

The **Allocation** info area is an independent info area used to enter the field reps responsible for an area in Aurea CRM win.

Enter the country and the postal code range (in the **From/To Postal Code** fields) and optionally a **Business Area** and/or **Product Group**. Enter one or more field reps (**Rep 1** – **Rep 10** fields).

Allocating Reps via Allocation Records

Country, From/To Postal Code: If a **company**, **person** or **person** with a matching address (**Country** and **Postal Code** fields) is added or edited, the reps entered in the allocation record are transferred to the corresponding fields in the company, person or property record. The first 5 reps in the allocation record are transferred to companies, the first 2 to persons and the first 4 are transferred to properties. Other data entered in this info area is also transferred, see Transferring Area-dependent Information.

If you add a person in company (KP) record and enter an address (**Country**, **Postal Code**), the reps entered in the **Rep 1** and **Rep 2** in the **Allocation** info area are transferred to the **Private rep** and **Private back office** fields in the **Person in Company** (KP) info area. The reps are entered in the **Rep** and **Office Rep** fields in the person (PE) associated with the company in person (KP) record.

Product Group and/or Business Area: If a **sales group** record stored for a company or person with a matching address is added or edited, all 10 reps are transferred from the allocation record to the corresponding fields in the sales group record. Furthermore, the **Area** is transferred to the sales group.

Note: If you enter both a **Business Area** and **Product Group** in a sales group record, the allocation record containing both a matching product group and sales group is used to transfer reps. If no matching allocation record is found, the allocation record is used containing the first criterion (business area **or** product group) entered in the sales group.

Changes to data in the **Allocation** info area are not automatically propagated to companies, persons, properties or sales groups. Changes can only be propagated automatically using sales territory management records, see Sales Territory Management.

Transferring Area-dependent Information

When adding or editing company, person and property data (entering a country and postal code), some area-dependent information is entered automatically based on the data entered in the **Country**, **City** and **Allocation** info areas:

Field	Country	City	Allocation	Target Info Areas
County	-	x	-	FI/KP/OJ/PE
State	-	x	x	FI/OJ

Field	Country	City	Allocation	Target Info Areas
State	-	x	-	**KP/PE**
Label	x	-	-	**FI/KP**
Jurisdiction	-	x	x	**FI/OJ**
Area	-	x	x	**FI/OJ**
Po. Dist.	-	x	x	**FI/OJ**
Country Code	x	-	-	**FI/KP/OJ/PE**
Area Code	-	x	-	**FI/KP/OJ/PE**

The reps are transferred as follows:

Field	City	Allocation	Target Info Areas
Rep 1	x	x	**FI/OJ/PE**
Rep 2	x	x	**FI/OJ/PE**
Rep 3	-	x	**FI/OJ**
Rep 4	-	x	**FI/OJ**
Rep 5	-	x	**FI**

If matching entries are found in both the **City** and **Allocation** info areas, the data in the **Allocation** info area is used.

Allocation Info Area

The **Allocation** info area is an independent info area used to enter the field reps responsible for an area in Aurea CRM win.

Enter the country and the postal code range (in the **From/To Postal Code** fields) and optionally a **Business Area** and/or **Product Group**. Enter one or more field reps (**Rep 1** – **Rep 10** fields).

Allocating Reps via Allocation Records

Country, From/To Postal Code: If a **company**, **person** or **person** with a matching address (**Country** and **Postal Code** fields) is added or edited, the reps entered in the allocation record are transferred to the corresponding fields in the company, person or property record. The first 5 reps in the allocation record are transferred to companies, the first 2 to persons and the first 4 are transferred to properties. Other data entered in this info area is also transferred, >> Transferring Area-dependent Information on page 402.

If you add a person in company (KP) record and enter an address (**Country**, **Postal Code**), the reps entered in the **Rep 1** and **Rep 2** in the **Allocation** info area are transferred to the **Private rep** and **Private back office** fields in the **Person in Company** (KP) info area. The reps are entered in the **Rep** and **Office Rep** fields in the person (PE) associated with the company in person (KP) record.

Product Group and/or Business Area: If a **sales group** record stored for a company or person with a matching address is added or edited, all 10 reps are transferred from the allocation record to the corresponding fields in the sales group record. Furthermore, the **Area** is transferred to the sales group.

Note: If you enter both a **Business Area** and **Product Group** in a sales group record, the allocation record containing both a matching product group and sales group is used to transfer reps. If no matching allocation record is found, the allocation record is used containing the first criterion (business area **or** product group) entered in the sales group.

Changes to data in the **Allocation** info area are not automatically propagated to companies, persons, properties or sales groups. Changes can only be propagated automatically using sales territory management records, >> Sales Territory Management on page 394.

Transferring Area-dependent Information

When adding or editing company, person and property data (entering a country and postal code), some area-dependent information is entered automatically based on the data entered in the **Country**, **City** and **Allocation** info areas:

Field	Country	City	Allocation	Target Info Areas
County	-	x	-	FI/KP/OJ/PE
State	-	x	x	FI/OJ
State	-	x	-	KP/PE
Label	x	-	-	FI/KP

Jurisdiction	-	x	x	FI/OJ
Area	-	x	x	FI/OJ
Po. Dist.	-	x	x	FI/OJ
Country Code	x	-	-	FI/KP/OJ/PE
Area Code	-	x	-	FI/KP/OJ/PE

The reps are transferred as follows:

Field	City	Allocation	Target Info Areas
Rep 1	x	x	FI/OJ/PE
Rep 2	x	x	FI/OJ/PE
Rep 3	-	x	FI/OJ
Rep 4	-	x	FI/OJ
Rep 5	-	x	FI

If matching entries are found in both the **City** and **Allocation** info areas, the data in the **Allocation** info area is used.

Administrator Information

Deactivating Individual Functions

Your administrator can determine whether data is automatically transferred and whether sales groups and property managers are added or updated whenever address data is updated (e.g. edited manually, imported or when applying changes in the Maintenance module).

- Use the **Disconnect Fields from City Table** and **Disconnect Fields from Country Table** configuration entries to prevent fields from being filled in automatically when a country and postal code are entered. You can deactivate the transfer for each individual field and info area, >> *CRM.core Administrator Guide*.

- Use the **Disable sales group from the Allocation table** configuration entry to prevent data being transferred from the **Allocation** info area when adding new sales groups, >> *CRM.core Administrator Guide*.

- Automatically allocating reps based on data in the **Allocation** info area can be completely disabled in the access rights (**Deny Access** to the info area), >> *CRM.core Administrator Guide*. However, this negatively affects performance.
- You can prevent sales group and property manager records from being created or updated automatically based on the data in the **Sales Territory Management** info area in the **CRM Process configuration** info area, >> *CRM.core Administrator Guide*:
  - "Use sales territory management when importing"/"Use sales territory management in the Maintenance module": If access to these processes is denied, no sales group or property manager records are added or updated when importing data or updating data in the Maintenance module.
  - "Sales Territory Management" process: If access to this process is denied, assigning reps based on the settings in the **Sales Territory Management** info area is disabled completely. (If you are not using the **Sales Territory Management** info area at all, update recommends denying access to this process for performance reasons.)

Import Behavior

When importing **companies, persons (PE) and properties**, the responsible reps are determined in the following order:

1. Entries in the **City** or **Allocation** info area.

> **Note:** If data has been entered in both the **City and Allocation** info area, the entries in the **Allocation** info area are used, even if the rep fields are empty.

2. If the imported companies, persons and properties also match criteria defined in the **Sales Territory Management** info area, corresponding sales groups or property manager records are added during the import process.
3. If new sales group records are added when importing companies and persons, the system also checks for matching data in the **Allocation** info area: If matching allocation records are found, fields are transferred to the sales group if the corresponding fields in the sales group record are empty.

If existing company, person or property records are changed by the import, reps are only transferred from the **Allocation** info area if the corresponding rep fields in the **Company**, **Person** or **Property** info areas are empty. Previously assigned reps are not overwritten by the import.

When importing **persons (KP)**, the responsible reps are determined as follows:

1. If the imported persons also match criteria defined in the **Sales Territory Management info area, corresponding person-related sales groups are added during the import process.**
2. If new sales group records are added when importing persons, the system also checks for matching data in the **Allocation** info area: If matching allocation records are found, fields are transferred to the sales group if the corresponding fields in the sales group record are empty.

When importing **sales groups**, the responsible reps are determined based on the data in the **Allocation** info area as follows:

If existing sales group **or property manage** records are changed by the import, reps are only transferred from the **Allocation** info area if the corresponding rep fields in the **Sales Group** or **Property Manager** info areas are empty. Previously assigned reps are not overwritten by the import.

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Sales Management

Potential

Use the **Potential** info area (not available by default in Aurea CRM web) to compare the actual data for each customer, product group and sales area with the estimated revenue over the period of a year.

Records in the **Potential** info area are added automatically or updated whenever an item is entered in an offer or order.

The potential record is updated or added for each product group and business area entered in offer and order items added for this company this year.

Furthermore, aggregated records are also added where the **Product Group** and **Business Area** are empty. The data in the potential records for individual business areas and product groups are stored in these records.

The values in the **Revenue** and **Potential minus Revenue** fields are calculated automatically. The **Revenue** is calculated from the sum total of the value of all orders over the year per product group and business area.

Note: In order for offers and orders to be included in the calculations of the potential, a date must be entered in the offer or order (**Offer Date** and **Order Date** fields), and a **Product Group** needs to be entered in the offer or order items.

Fields and Functions in the Potential Info Area

Field	Content it	Description
Estimated	Entered	Estimated revenue
Projected	Calculated	Sum of the weighted values of all relevant offer items
Competition	Entered	Competitor's revenue
Revenue	Calculated	Sum of the value of all relevant order items

Margin	Calculated	Sum of the margins of all relevant order items
Margin (%)	Calculated	Profit margin as a percentage of revenue.
Potential minus revenue	Calculated	Potential - revenue
Costs	Calculated	If the product group is empty, then the total costs for visits, telephone calls and mailings (= **Total Costs** field in the **Support** info area)

A **relevant offer item** is:

either	an open offer item for the selected product group, that is neither optional nor an alternative and was added this year	if a product group is entered in the potential record.
or	an open offer item added this year for any product group	if no product group is entered in the potential record.

The same applies to order items.

Support

The **Support** info area provides an overview of the support intensity for an individual person or the entire company and allows you to compare this with the revenue values in the **Potential** info area.

Click on ⊕ (**New**) to add a new support record.

When viewing a support record, click on ▦ (**Calculate**) to calculate the support intensity for the year.

To view the support records stored for a company or person select **Go to All** > **All Support Intens.** from the company or person's context menu.

Note: The support intensity is calculated using a CRM.server To-Do, >> *CRM.core Administrator Guide*.

When calculating the support for a person, only those records are taken into account that were added for the person. When calculating the support for a company, all records added for the company and all persons in the company are taken into account.

A support record is updated or added (based on the calculation's time period) for each year for which at least one offer, order, mailing, telephone call or visit exists. Potential records for all product groups that are entered in the offer lines or order items, as well as the total potential for each year (for which no product group is entered) are updated.

The following records are used by the calculation:

- Completed visits (**Activity** info area, **Type** = "Visit" and **Status** = "Completed")
- Completed telephone calls (**Activity** info area, **Type** = "Telephone" and **Status** = "Completed")
- Mailings
- Offers
- Orders
- Potential records

Consolidation

The **Consolidation** info area (not available by default in Aurea CRM web) displays a summary of the orders for all those companies for which a relationship record with the selected company has been defined (in the **Relationship** info area) where the **Revenue Consolidation** check box has been enabled.

Revenues are consolidated by year and currency. All order items in all orders where **Revenue Consolidation** is enabled are included.

Consolidation records are added for:

- Each product where at least one item has been entered as an offer item
- Each product group where at least one item has been entered as an offer item (the **Product** field is left empty)
- All product groups (the **Product Group** and **Product** fields are left empty).

Consolidation records are only generated for a company if at least one further company was included in the revenue consolidation.

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Sales Cycle

A sales cycle defines a time period during which a specific item (e.g. products relating to seasonal holidays) is sold or during which specific targets should be achieved. 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.

When adding a sales cycle, you can define work orders assigned to reps etc. Sales cycles can overlap.

Select > **Sales Cycle** to add a sales cycle.

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).

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. Work orders generated within the scope of a sales cycle are assigned to marketing activities.

Sales cycles can be linked to activities and work orders via marketing activities.

If a marketing activity is assigned to a sales cycle, and linked to an activity or work order, the sales cycle entered in the marketing activity is entered in the linked record.

Note:

If the link to the marketing activity is changed, the sales cycle entered in the linked records is overwritten (or deleted if the newly linked marketing activity is not linked to a sales cycle). If the sales drive in the marketing activity is changed, this change is not applied to linked records.

For more information on the individual fields, refer to the online field help.

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Expenses and Receipts

You can add expenses and receipts for reps in Aurea CRM.

Expenses

You can use the **Expenses** info area to store the duration and costs of business trips.

To add a new expense record:

1. Select [icon] (**Collaboration**) > **New Expenses**.

2. Enter the **Currency**.

3. Enter additional data such as:

   - The **Dep. Date** (departure date) and **Arrival Date**: The total duration (in days) is automatically calculated and entered in the **Travel duration** field.

   - Information on travel by car: The costs (**Mileage Allowance** field) are calculated automatically.

   - Daily rates and accommodation rates: The sum total of the rates is automatically calculated (**Total Flat Rates** field).

   Note: Enter total amounts for flat rates, not the flat rate per day.

4. Save.

You can add receipts to expense records, >> Receipts on page 411.

The sum total of the costs entered in the receipts is calculated and entered in the **Total Amount** field in the **Expenses** info area. The mileage costs are added to this amount and entered in the **Receipts Total** field.

Receipts

To add a receipt to an expense record:

1. Switch to the desired expense record.

2. Select **New Receipt** from the context menu.

3. Enter the data.

4. Save the record.

You can add any number of receipts to an expense record. The sum total of the costs entered in the receipts is calculated and entered in the **Total Amount** field in the **Expenses** info area.

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Properties - BTB only

Learn to use the properties info area to store basic information on construction projects or real estate such as the address, property type, start of construction and the estimated order volume.

Note: Duplicate properties can be merged, similar to companies, see Merging Companies and Persons and *Merging Properties (BTB only)* in the *Aurea CRM web Administrator Guide*.

You can search for properties using the property search in Aurea CRM win, as well as add properties to selections.

Adding Properties

To add a new property:

1. Select ![cart icon] (**Sales**) > **New Property**.

2. Enter the details and save.

   Depending on your sales territory management settings (see Territory Management - BTB only on page 389), reps may be automatically assigned to the property as property managers once you enter a **Country** and **Postal Code**. These reps are displayed on the **Property Manager** tab.

   If another identical or similar property is already stored in the database, you can determine whether to add the property as a new record or whether to retain the old record or overwrite it with the new record.

3. You can enter additional information relating to a property on the tabs under **Related Data**, see Property-Related Data.

Note: Select ![icon](**Sales**) > **Properties without Allocation** to list all properties where no property managers have been entered.

Property-Related Data

You can enter additional data relating to the property in the following info areas:

- **Product:** Information about the products relating to a property if no concrete offer exists.
- **Property Competitor:** Information on the products and prices of competitors.
- **Property Note:** Notes on the property

Participants

You can add companies and persons to properties in various roles (e.g. owner, architect, construction manager) using the **Property Participant** info area.

To add a company or person as a property participant:

1. Switch to the property and add a new participant (via the context menu or the **Property Participants** tab).

2. Search for and select the desired person or company.

3. Select a role for the participant.

To view the properties that a company or person is involved with, select **Go to All Related** > **All Property Participations** from the company or person's context menu.

Activities, tasks, orders and installed bases can be added from a property participant's context menu.

Project Hierarchy

Properties in Aurea CRM can be hierarchical, i.e. a property can be defined as a sub-property of another property.

To add a sub-property to an existing property:

1. Switch to the parent property.

2. Select **New** > **New Sub-Property** from the context menu.

3. Enter the sub-property's data.

Select **Hierarchy Tree** from a property's context menu to display all properties in the hierarchy in tree form.

Note: Sub-properties are also displayed on the **Property** tab when displaying a property in tab view.

Merging Properties

Duplicate properties in the database can be merged to form a single record.

Select **Merge with** with from the property's 's context menu (e.g. in the search results list or tab view). You can also mark the two entries in the results list you wish to merge and select **Start Merge Process** from the context menu.

Note: Merging properties is similar to merging companies, see Merging Companies and Persons on page 221.

Adding Properties

To add a new property:

1. Select > **New Property**.

2. Enter the details and save.

   Depending on your sales territory management settings (>> Territory Management - BTB only on page 389), reps may be automatically assigned to the property as property managers once you enter a **Country** and **Postal Code**. These reps are displayed on the **Property Manager** tab.

   If another identical or similar property is already stored in the database, you can determine whether to add the property as a new record or whether to retain the old record or overwrite it with the new record.

3. You can enter additional information relating to a property on the tabs under **Related Data**, >> Property-Related Data on page 414.

Note: Select ![icon](**Sales**) > **Properties without Allocation** to list all properties where no property managers have been entered.

Property-Related Data

You can enter additional data relating to the property in the following info areas:

• **Product:** Information about the products relating to a property if no concrete offer exists.

• **Property Competitor:** Information on the products and prices of competitors.

• **Property Note:** Notes on the property

Note: Activities, offers, orders and installed bases are added for the companies and persons involved with the property, >> Participants on page 414.

Participants

You can add companies and persons to properties in various roles (e.g. owner, architect, construction manager) using the **Property Participant** info area.

To add a company or person as a property participant:

1. Switch to the property and add a new participant (via the context menu or the **Property Participants** tab).

2. Search for and select the desired person or company.

3. Select a role for the participant.

To view the properties that a company or person is involved with, select **Go to All Related** > **All Property Participations** from the company or person's context menu.

Activities, tasks, orders and installed bases can be added from a property participant's context menu.

Project Hierarchy

Properties in Aurea CRM can be hierarchical, i.e. a property can be defined as a sub-property of another property.

To add a sub-property to an existing property:

1. Switch to the parent property.

2. Select **New** > **New Sub-Property** from the context menu.

3. Enter the sub-property's data.

Select **Hierarchy Tree** from a property's context menu to display all properties in the hierarchy in tree form.

Note: Sub-properties are also displayed on the **Property** tab when displaying a property in tab view.

Property Evaluation

You can evaluate properties using portfolios in Aurea CRM web. To do so, your administrator needs to define a suitable portfolio, >> Portfolios on page 244.

To evaluate a property, select **New** > **New Portfolio**. Select **Go to All Related** > **All Portfolios** from the context menu to display previously answered portfolios.

Merging Properties

Duplicate properties in the database can be merged to form a single record.

Select **Merge with** with from the property's 's context menu (e.g. in the search results list or tab view). You can also mark the two entries in the results list you wish to merge and select **Start Merge Process** from the context menu.

Note: Merging properties is similar to merging companies, >> Merging Companies and Persons on page 221.

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Campaigns and Marketing Activities

Aurea CRM supports you in planning, executing and monitoring marketing campaigns. A campaign consists of one or more marketing activities. Campaigns target customers and interests based on information accumulated by sales, service and marketing employees.

You can:

- Define customer-specific marketing activities (e.g. telephone surveys or mailings).
- Determine the responsible rep (e.g. telemarketing agent, account manager).
- Define the available responses from the target group
- Edit the generated target group
- Generate and edit activities, work orders or mailings
- Generate mass mailings and faxes
- Send SMS and e-mails
- Trigger follow-up 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 will fail.

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.
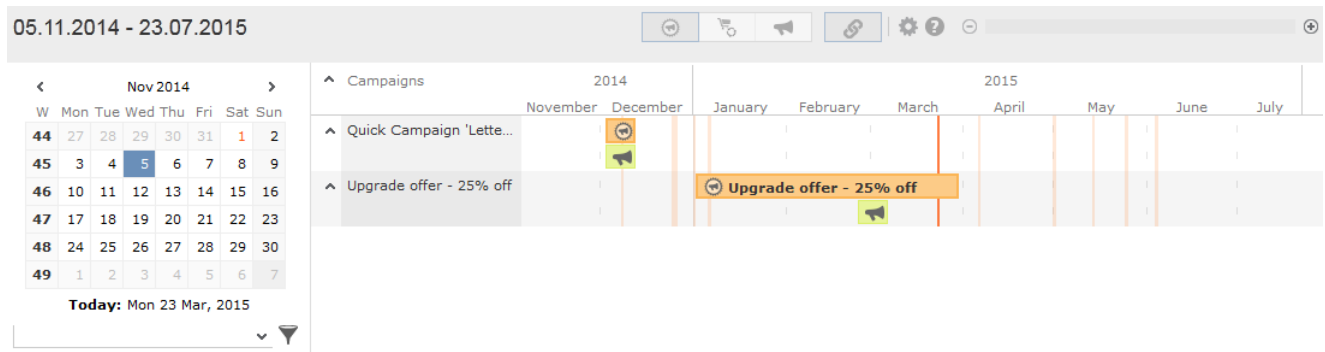
Individual elements (campaigns, sales cycles, marketing activities) are displayed as colored blocks.

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:

  * [icon] : Campaigns and marketing activities

  * [icon] : Sales cycles and marketing activities

  * [icon] : 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.
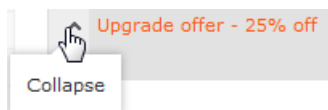

* ⚙ (**Edit Settings**): Choose whether to color-code elements by type (info area) or status.

* ❓ (**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.
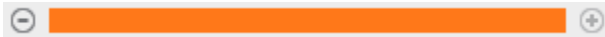
  - Drag the timeline at the top of the calendar to the left of right to scroll the time period.

- 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, >> Defining General Filters on page 257.

- 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:
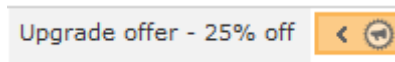
- To change an entry's start or end, click on the left or right border and drag it to the desired position:
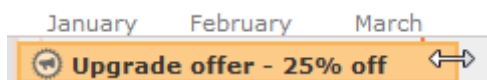
- To reschedule an element, click on it and drag it to the desired time.

  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.

Quick Campaigns

Quick campaigns allow you to generate a letter for several persons, without needing to first add a campaign and associated marketing activities etc.

Quick campaigns are accessible from the result lists for companies, persons, persons in company and in queries.

• Rows in query results may include data from multiple records, and may therefore contain multiple recipients that can be used by the quick campaign, >> Adding Info Areas on page 130.

  If a row contains multiple possible recipients e.g. multiple records in the FI, FP, CP and PE info areas, the last record in the query row (in the last info area defined in the query) is used to determine the recipient.

  If a row does not contain any recipients, but contains data from one or more records, the standard link to the parent record in the last info area defined in the query is used to determine the recipient (e.g. the company a ticket is linked to). If several default links are available, e.g. for a company and a person, the recipient is determined in the order KP/CP/PE/FI.

• If the results include several pages, only those (selected) persons on the current page are included.

To start a quick campaign:

1. Start the company or persons search or execute a query that returns companies or persons.

2. Select the records you wish to send a letter to, >> Selecting Multiple Records on page 101. If you do not select any rows in the results list, the quick campaign is executed for all rows.

3. Click on 🔧 (**Quick Campaign**).

4. 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

5. When you close the document, you will be informed of which marketing activity the letter was linked to. You can click on the link in the message to open the marketing activity.
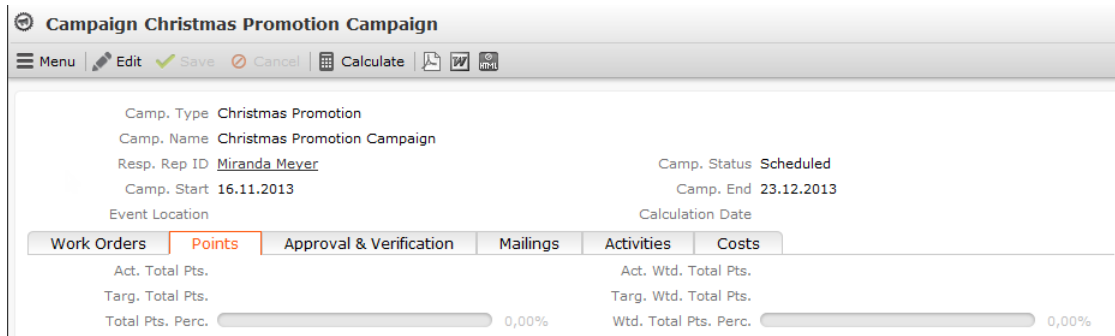
Campaigns

A campaign consists of one or more marketing activities that take place sequentially.

You can also add marketing activities that are not part of a campaign, >> Defining Marketing Activities on page 428.

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. You then need to customize the data in the new campaign:

      1. Search for and select the desired campaign template.

      2. The date entered in the campaign is not copied. Enter the desired date for the new campaign and click on **OK**. The campaign, including all associated marketing activities, is copied and rescheduled for the new date.

3. Enter the relevant data in the fields, including the name of the campaign, the type, the rep responsible for the campaign as a whole and the start and end date.

4. Save the record.

5. Add the marketing activities that make up the campaign, >> Defining Marketing Activities on page 428.

Campaign Plan

The campaign plan provides you with a hierarchical overview of the campaign in a tree view. You can add and edit marketing activities, responses and other records.

To display the campaign plan:

1. Select **Campaign Plan** from the campaign's context menu.

   The tree view is displayed on the left.
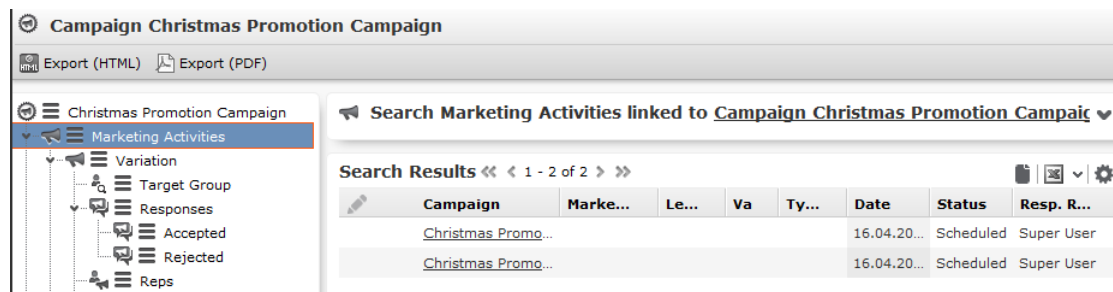
You have the following options in the campaign plan:

- Click on the arrows in the tree view to open and close the nodes in the tree.
- Click on an entry in the tree view to display the record in the area on the right and edit it.
- Click on ≡ to open a record's context menu, in order to add new child records or delete the record.
- You can create a report containing the campaign's structure. Click on the desired export button to do so (e.g. ![HTML] (**Export (HTML)**).

Open Campaign Issues

You can display important information on a campaign that concerns you.

To view open campaign issues:

1. Select ![Marketing icon] (**Marketing**) > **Open Campaign Issues**.

A list of open campaign issues is displayed. If you need to edit a target group, for example, this information is displayed next to the generated To-Do in the open campaign issues.

Marketing Activities

Marketing activities are executed in the following steps:

1. Preparation, >> Planning and Preparing Marketing Activities on page 423.

2. Define the marketing activity and any additional information, >> Defining Marketing Activities on page 428.

3. Edit the target group, >> Editing Target Groups on page 439.

4. Generate and edit the data, >> Executing Marketing Activities on page 440.

5. Monitor the results, >> Calculating Statistics on page 442.

Related marketing activities can be grouped together to form campaigns, >> Campaigns on page 421.

Planning and Preparing Marketing Activities

Before executing a marketing activity, you need to enter its details and create any necessary documents and 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, >> Queries on page 123.

   You do not need to define a target group for follow-up activities and published adverts: These target groups are built up later. The target group created for a follow-up activity contains those customers/prospects that responded to the previous activity in a specific manner.

Note: 🖥 Target groups can also be generated from selections created in Aurea CRM win. For more information on selections, >> **Selections** in the *Aurea CRM win User Guide*.

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.

Note: 🖥 Labels are defined in Aurea CRM win, >> **Label Formats** in the *Aurea CRM win User Guide*.

4. Determine which database fields you want to merge with the text of the letter or e-mail.

Note: 🖥 A transfer fields format needs to be defined for these fields in Aurea CRM win, >> **Defining Transfer Fields** in the *Aurea CRM win User Guide*.

5. To create mass mailings and faxes, create a serial letter in Aurea CRM win, >> *Aurea CRM win User Guide*.

6. For e-mails:

Note: To send e-mail in a language other than the default languages, you should use UTF-16 encoded template document. For example, to send an e-mail in Cyrillic, the template document should be encoded in UTF-16. You can use any text editor that supports UTF-16, to encode the template document.

a. Create a file containing the e-mail's body text, >> Contents of a Mass Mailing on page 425.

b. Verify that e-mail addresses have been entered for the companies/persons in the target group.

Note: Aurea CRM web only supports sending e-mails via SMTP within the scope of marketing activities.

7. For SMS:

- Define the SMS settings, >> mmsms.ini File on page 426.

- Create a file containing the text message's body text, >> Contents of an SMS on page 428.

8. For surveys (via telephone or e-mail):

- Add a questionnaire, >> Defining Questionnaires on page 282.

Note: To send an e-mail in a language other than the default languages, you should use UTF-16 encoding for the template document. For example, to send an e-mail in Cyrillic, encode the template document in UTF-16. You can use any text editor that supports UTF-16, to encode the template document.

Contents of a Mass Mailing

You can enter the template used by a mass mailing in the following fields:

E-mail: Template Document: If you enter a document in this field, MS Word is started before e-mails are sent, and you can merge transfer fields with the place-holders in the document template. You can use any document format supported by your version of Word.

E-mail: Template Document (TXT): Enter an HTML file in this field and use the syntax described below in HTML mails.

Note: To send email in a language other than the default languages, you should use UTF-16 encoding for the template document. For example, to send a mail in Cyrillic, encode the HTML template document in UTF-16.

Notation for HTML Files

Enter the body text to be used by your mailing in an HTML file. You have the following options:

- Use variables to include field contents in the text, e.g. `<%KPLastName%>` to include the contents of the **Last Name** field in the **Person in Company** info area (KP).

- Use the `<%Greetings%>` element to include the greeting defined in the label format.

- Use the "`url:`" prefix in front of a field name apply URL encoding to the field. Spaces are then encoded as "%20", for example.

- The "`html:`" prefix encodes the field as HTML. Characters that are forbidden in HTML are replaced, e.g. "&" is replaced by "&".

- Use IF, THEN and ELSE statements to compose the e-mail based on the values stored in specific fields.

```
<%$IF FICountry = 'Italy'%>
Text for Italian companies
<%$ELSE%>
Text for all other companies
<%$FI%>
```

  - A period (full stop) is used to denote decimal places; i.e. "12.5" for twelve and a half.
  - The following operators are available for logical expressions: <; <=; >; >=; =; <>
  - You can carry out calculations using +, -, *, / and parentheses, e.g. (2+FIFreeDec1)*3.
  - The following operators can be used in IF statements:

- UCASE converts text to upper case, e.g. UCASE(KPFirstName)
- LCASE converts text to lower case, e.g. LCASE(KPFirstName)
- LEN returns the length of the field contents, e.g. LEN(KPFirstName)
- INSTR returns the (first) position that a string or value occurs at within a text, e.g. INSTR(KPE-mail,"@Aurea.com") returns the value 5 for the e-mail address "info@Aurea.com"; it returns 0 (zero; not found) for "test@hotmail.com".

mmsms.ini File

To configure the system to send SMS within the scope of marketing activities, add a file named `mmsms.ini` to the `system\db` directory containing the following parameters (contact your SMS provider for details of your IDs, passwords and an interface description):

```
[configuration]
```

```
profile=MyProfile
```

Defines the name of the profile that is used.

```
[MyProfile]
```

Profile name (only the profile that is defined in the [configuration] entry is taken into account)

```
connectionString=http://sms.xxxxx.at/api/?application_id=abc123&username=demo&pass=demo1
```

```
messageString="message"
```

```
dialString="deliverto"
```

Use the interface description delivered by your provider to define a valid and readable request. These settings are then added to the URL, e.g.:

http://sms.xxxxx.at/api/?application_id=abc123&username=demo&pass=demo1&message=message&deliverto=0043676123456

`encoding=1`

0 = no encoding, 1 = URL encoding

`post=1`

Use post=1 to send a request using HTTP POST (otherwise HTTP GET is used).

`maxTextLen=300`

The maximum length of the message. Longer messages are truncated at this point.

`telPrefix=""`

The character required by your provider before the international dialing code, e.g. '+'.

`Err=-1`

Use Err=-1 to output error messages from your provider instead of replacing them with Aurea CRM error messages.

`Err3="ERROR 002"`

`Err4="WRONG USER"`

Use these options to link error messages sent by your SMS provider with Aurea CRM error messages. The error messages in Aurea CRM are output instead of those from your provider. Example: The documentation supplied by your SMS provider describes the following error messages: "ERROR 002" occurs if the connection to the server cannot be established; "WRONG USER" occurs if the login is not recognized.

The errors in Aurea CRM are as follows:

`Err1`: Invalid profile (ini file); internal error message, cannot be linked

`Err2`: Message not found; internal error message, cannot be linked)

`Err3`: No connection to the server

`Err4`: Invalid user

`Err5`: Invalid account (verify the user name and password)

`Err6`: Login valid, no credit available

`Err7`: Invalid or empty message

`Err8`: Invalid telephone number

`port=n`

Enter the number of the port used to send the SMS. If you do not specify a port, the standard ports (80 or 443) are used.

Contents of an SMS

Enter the body text to be used by your SMS in a text file. You have the following options:

- Use variables to include field contents in the text, e.g. `<%KPLastName%>` to include the contents of the **Last Name** field in the **Person in Company** info area (KP).

- Use the `<%Greetings%>` element to include the greeting defined in the label format.

- Use IF, THEN and ELSE statements to compose the SMS based on the values stored in specific fields.

  `<%$IF FICountry = 'Italy'%> Text for Italian companies %$ELSE% Text for all other companies %$FI%`

  - A period (full stop) is used to denote decimal places; i.e. "12.5" for twelve and a half.

  - The following operators are available for logical expressions: <; <=; >; >=; =; <>

  - You can carry out calculations using +, -, *, / and parentheses, e.g. (2+FIFreeDec1)*3.

  - The following operators can be used in IF statements:

    - UCASE converts text to upper case, e.g. UCASE(KPFirstName)

    - LCASE converts text to lower case, e.g. LCASE(KPFirstName)

    - LEN returns the length of the field contents, e.g. LEN(KPFirstName)

    - INSTR returns the (first) position that a string or value occurs at within a text, e.g. INSTR(KPE-mail,"@Aurea.com") returns the value 5 for the e-mail address "info@Aurea.com"; it returns 0 (zero; not found) for "test@hotmail.com".

Defining Marketing Activities

To define a marketing activity:

1. Select (**Marketing**) > **New Marketing Activity**.

   You can also add the marketing activity to a campaign (either using the campaign's context menu or from the **Marketing Activities** tab).

2. Determine whether you want to create an **Empty Marketing Activity** or select **Use Template** to copy the data from an existing marketing activity.

> **Note:** You can only use marketing activities whose **Status** is "Template" as a template.

3. Enter a name in the **Marketing Activity** field.

4. Save the record.

5. Enter the following data:

- Responses, >> Responses on page 429.

- Reps, >> Reps on page 430.

- Details on how the activity is executed, >> Defining How the Activity is Executed on page 431.

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. Add a response to the first marketing activity.

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 activity's target group.

5. Enter the number of points assigned to this response in the **Individual Points** field on the **Numbers & Points** tab and enter the expected number of responses in the **Number (Target)** field. The target and actual points can then be compared in the statistics, >> Calculating Statistics on page 442.

6. Save the record.

Reps

Add the reps who are responsible for handling the campaign in addition to the rep responsible for the campaign itself:

1. Click on ⊕ (**New**) on the **Reps** tab or select **New** > **New Marketing Activity Rep** from the context menu.

2. Enter the desired rep in the **Rep ID** field.

3. Determine the rep's task(s):

   • **Telephone:** Indicates whether the rep is responsible for making or answering phone calls within the scope of this marketing activity.

   • **E-mail:** Indicates whether the rep is responsible for processing incoming e-mails within the scope of the marketing activity.

   • **Target Group:** Indicates whether the rep is responsible for verifying and editing a portion of the target group. The rep receives a To-Do once the target group has been generated, >> Editing Target Groups on page 439.

Note: The **Telephone** and **E-mail** fields have no function in the default configuration.

---

4. Save the record.

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 work orders

• File formats and other information on mailings, e-mails, SMS and faxes.

To enter the details of how a marketing activity is executed:

1. Select **Create / Edit Execution** from the marketing activity's context menu.

2. Select a **Marketing Activity Format** or select **Create Marketing Activity Format** from the context menu to add a new one, >> Defining the Marketing Activity Format on page 433.

3. Enter the **Start Date** and **Start Time** to determine when the marketing activity should be executed and the target group generated.

4. Use the **Base** field to determine the basis for the target group. The target group can be determined using a selection, a global query or a private query, >> Queries on page 123.

Note: Selections are defined in Aurea CRM win.

---

5. Select a predefined query or selection 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.

---

6. Select an option in the **Execution Type** field.

The following options execute the marketing activity a single time:

• **One-off, execute selection/query:** When generating the records, the selection or query is updated and the used to determine the target group.

• **One-off, do not execute selection/query:** When generating the records, the selection or query is not updated. Those companies already stored in the selection are used to generate the target group.

• **One-off, only response processing:** 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 **Repeat** tab):

* **Repeated, always execute selection/query:** The existing target group is deleted each time the activity is executed. The selection or 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 after the selection has been refreshed.

---

* **Repeated, execute selection once:** The selection is updated when generating the target group. The selection is not updated when the execution is subsequently repeated.

* **Repeated, never execute selection:** The selection is not updated when generating the target group. The selection is not updated when the execution is subsequently repeated.

* **Repeated, only response processing:**The target group is generated automatically based on responses to the previous marketing activity or by editing the target group manually.

* **Repeated, packages:** The target group is generated from the selection or 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 **Automat.** 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 persons 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 selection/query:** The selection or query is extended each time the marketing activity is executed. The existing target group records are retained. Only those companies/persons 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 customers, e.g. to contact all companies that have had their status set to "Customer" since the last time the activity was executed.

Note: If you select a query, you need to select an execution type that executes the query at least once.

---

7. Enable the **Create target group** check box on the **Target Group** tab to use the selection or query to generate the target group.

8. Enter the time period available for processing the target group in the **Edit target group from**, **Edit target group until**, **Edit target group from (Time)** and **Edit target group until (Time)** fields.

9. Enter the rep assigned to CRM.server in the **Executing Rep ID** field. If you are unsure which rep this is, ask your administrator. This ensures that CRM.server processes the execution automatically.

10. Enable the **Start automatically** check box.

11. Define additional options in the following tabs:

   • **Generate:** Enter when records (such as activities) should be generated and until when responses can be entered.

   • **Activities:** Details on the generated activities and information on surveys

   • **Mailings:** Details on the generated mailings

   • **Work Orders:** Details on the generated work orders, >> Generating Work Orders for Marketing Activities on page 270.

   • **Send:** 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.

Note: You cannot generate mail merges in Microsoft Word on the web server. Once the marketing activity has been executed, you can download the control file and perform the mail merge locally in Microsoft Word. The control file can be accessed from the **Control Files** available below the mask. If you enable the **Save letters** option on the **Send** 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 295. Your administrator can add a button or menu option that you can use to generate the mail merge in Microsoft Word, >> Mail Merge Letters Based on Marketing Activities in the *Aurea CRM web Administrator Guide*.

   • **Repeat:** Time period and frequency with which the marketing activity is repeated

   • **Automat.:** Details relating to the automatic execution of the marketing activity; package size for marketing activities that are carried out in packages

   The **Log** tab displays status information which is entered during the execution of the activity.

   For more information on the individual fields, refer to the online field help.

12. Save the record.

Defining the Marketing Activity Format

You (or the executing rep) can define further details in the marketing activity format:

To define a marketing activity format:

1. Select **Create Marketing Activity Format** from the activity or execution's context menu.

2. Determine how to contact your target group under **Preferred Channel**:

   • **Fixed:** The channel used for all recipients (phone, letter, e-mail, SMS, fax).

   • **Variable:** The channel entered as the **Preferred Channel** for the person is used (assuming that the necessary information is also present, e.g. an e-mail address).

3. If activities, mailings and/or work orders should be generated within the scope of the marketing activity, enable the corresponding options under **Generate**. Activities are added as appointments for the telemarketing reps or account managers. Work orders contain tasks to be executed within the scope of regular customer appointments. Mailing records provide a log of mailings, the responses and the results of a letter or e-mail.

   • If you have selected a fixed channel or not specified a channel, select the appropriate type (e.g. **Activity** for the phone channel).

   • If you have chosen variable channels, select all the applicable options. The first option that is selected in the order mailing, activity, work order is taken into account (when using the phone channel, only activity or work order).

4. Use the tabs in the lower portion of the screen to determine further settings for all channels apart from "Phone":

   • **Transfer Fields:** Select the predefined transfer fields, >> Planning and Preparing Marketing Activities on page 423. 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 the company, the company or person's normal address is used.

   E-mail mailings are sent only to those persons or companies for which an e-mail address has been entered. The e-mail fields are used in the following order:

   For persons:

   1. **E-mail 1**

   2. **E-mail 2**

3. If an address type has been selected in the **Additional Address** field, the first additional address found for the person is used.

4. The e-mail address of the person's company (determined as described below).

For companies:

1. If an address type is selected in the **Additional Address** field and an address of the same type exists for the company in the **Additional Address** info area, the e-mail address entered there is used.

2. **E-mail 1**

3. **E-mail 2**

If none of the fields contains an e-mail address, no e-mail will be sent to this company or person.

- **Ignore assigned labels:** Replaces the label formats defined for companies and/or persons by a uniform label format.

- **Language Transformation:** All catalog values are transferred to Microsoft Word in the language entered for the person.

- **Format:** The control file's format:

  - **Variable field length/Fixed field length:** Determines whether records are output with separators or using a fixed field length.

  - **Assign numbers**: Records are numbered sequentially.

- **Separator:** Select the characters used as separators in the control file. Specify the separator between each **Record** and **Field**, and the **Field border** (at the start and end of a field).

5. Save the record. 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.
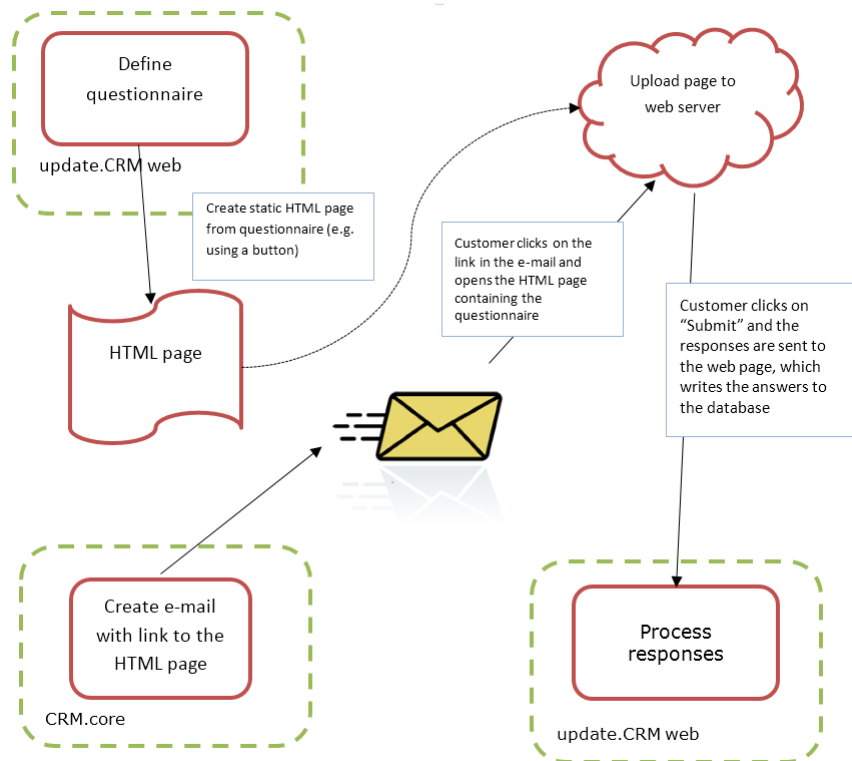
To generate e-mails with an integrated questionnaire:

1. Define a questionnaire, >> Defining Questionnaires on page 282.

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 **Settings** > **Maintenance** > **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 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 contains 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 431.

- **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 (>>).

- Select **E-mail** and **Activity** in the **Preferred Channel** section.

- Enter the transfer fields format on the **E-mail** tab.

8. Execute the activity, >> .

Creating a Target Group

To create a target group:

1. Click on **Create Target Group** in the marketing activity or execution record.

Note: This button is only active if an execution record has been defined for the marketing activity and your administrator has defined a CRM.server user ID.

The following fields are entered automatically:

- **Execution status:** empty
- **Start automatically:** enabled
- **Executing Rep ID:** the CRM.server user ID defined by your administrator
- **Starts on:** the current date
- **Starts at:** the current time + 10 seconds
- **Create target group:** enabled

If the **Target group definition** field contains an entry, the target group is created.

1. If you do not create the target group yourself, it will be generated automatically as the time entered in the execution record (**Starts on/at**).

The reps assigned to edit the target group receive a To-Do once the target group has been generated.

Editing Target Groups

To edit a target group:

1. Switch to the **Target Group** tab in the marketing activity.

The target group generated automatically is displayed.

2. Edit the target group:

- Click on ▦ (**Add Company**), ♟ (**Add Person in Company** or **Add Person**) or ⭐ (**Add Company from Favorites**, **Add Person in Company from Favorites**

or **Add Person from 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.

Note: You cannot add a person (PE) to the target group if you have already added the person to the target group as a person in company (KP).

- Remove records from the target group by enabling the **Inactive** check box.

  Always set the records that should not be included in the target group to **Inactive** instead of deleting them from the target group. This ensures that another user will not add the record to the target group a second time.

Note: The list of target group records includes fields from the **Company** and **Person** info areas. Depending on your configuration, you can sort records in the list of target group members using these fields by clicking on the column header. The sort order is not saved; if you reopen this area, the sort order is reset.

Executing Marketing Activities

To execute a marketing activity:

1. Click on **Start Marketing Activity** in the marketing activity or execution record. A message is displayed informing you that the activity will be started.

Note: This button is only active if an execution record has been defined for the marketing activity and your administrator has defined a CRM.server user ID.

The following fields are entered automatically:

- **Execution status:** empty
- **Start automatically:** enabled
- **Executing Rep ID:** the CRM.server user ID defined by your administrator
- **Edit target group until:** The current date (if the field was not empty)
- **Edit target group until (Time):** The current time plus 10 seconds (if the field was not empty)
- **Gen. Date (Scheduled):** The current date
- **Gen. Time (Scheduled):** The current time plus 10 seconds

- **Starts on:** the current date (if the field was empty)
- **Starts at:** the current time + 10 seconds (if the field was empty)

If the date in the **Starts on** field is between the campaign's start and end date, the marketing activity is executed.

1. If you do not start the activity manually, CRM.server executes the marketing activity at the time defined in the execution record (**Gen. Date (Scheduled)** field).

You will receive a message relating to the execution of the activity.

The following actions are performed:

- E-mails or SMS are sent to the target group and related information is stored in a mailing record.

  > **Note: Administrator Information:** You can define an e-mail address in the **Configuration** info area that all e-mails are also sent to as a blind carbon copy, >> Configuration > Campaigns in the *CRM.core Administrator Guide*.

- Activities and work orders are generated for further processing.
- Control files for mail merges and faxes are created.

Check whether the generation was successful:

- If a target group exists, the **Executed** check box is automatically enabled for each record that is processed successfully. (This field is not visible in the default configuration.)
- A log entry is added each time that records are generated for the marketing activity. Select **Go to All Related** > **All Logs** from the context menu to display the log entries.

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 1 (Marketing Act.)** - **Response 5 (Marketing Act.)** fields in the activity or mailing. If a follow-up activity is defined for the response, the customer/prospect is immediately assigned to the follow-up activity's target group. The result defined for the response in the **Result** field in the **Response (Marketing Activity)** info area is transferred to the **Result** field of 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, >> Carrying Out a Survey on page 285.

- 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").

Calculating Statistics

You can monitor the success and status of campaigns and marketing activities by performing statistical 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 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 activities, mailings and work orders 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 in various tabs in the campaign record and include details on the target number of mailings, activities and works orders and the total points scored by the responses. Furthermore, an overview of the associated costs in the default currency is available from the **Costs** tab.

The following charts illustrate how costs and points are calculated for individual fields.

Costs
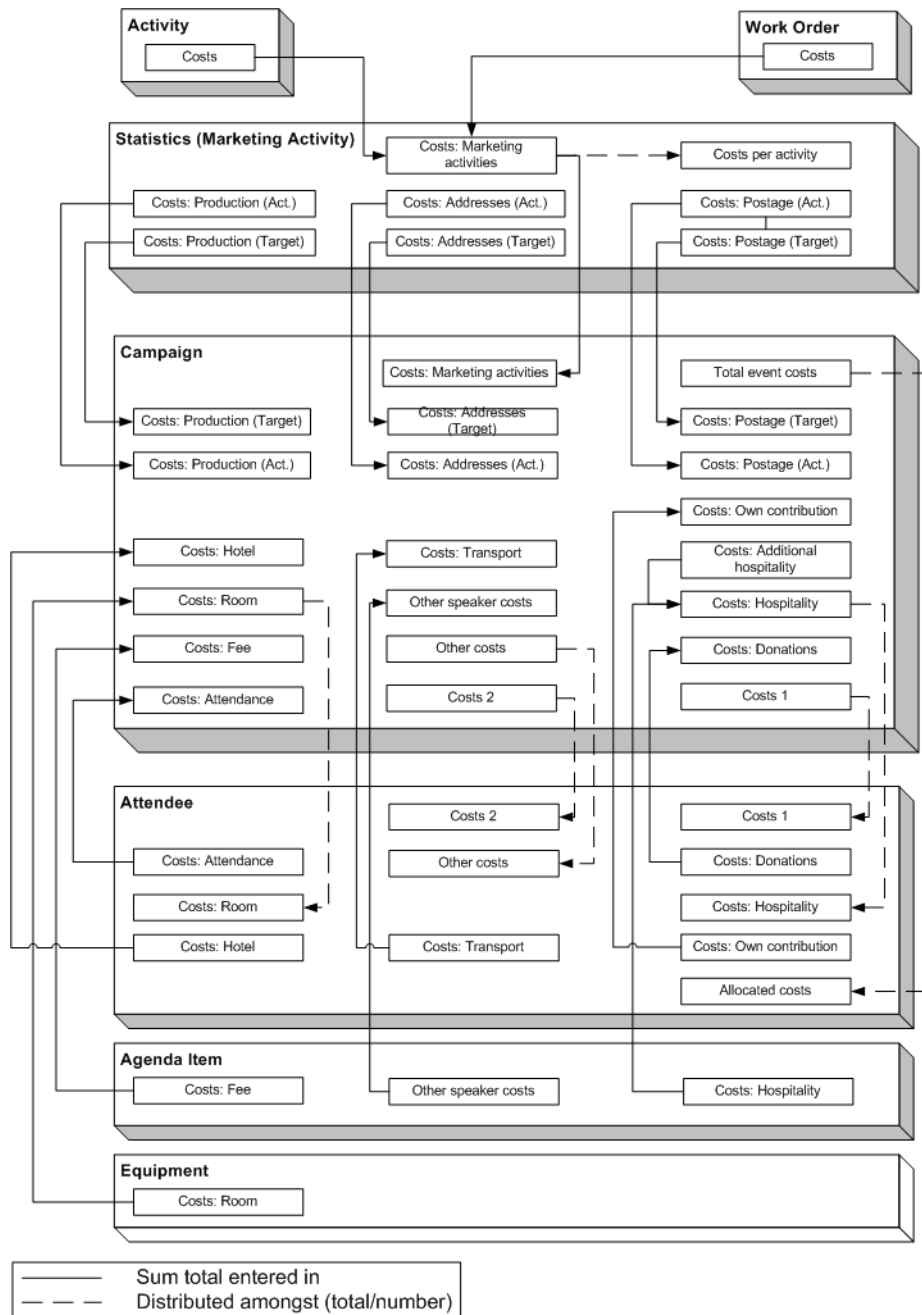
Campaign costs calculated based on data entered in the **Attendee**, **Agenda Item** and **Equipment** info areas are updated whenever you add a new record or edit an existing one. You can also click on **Calculate** in the **Campaign** info area to calculate the costs.

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
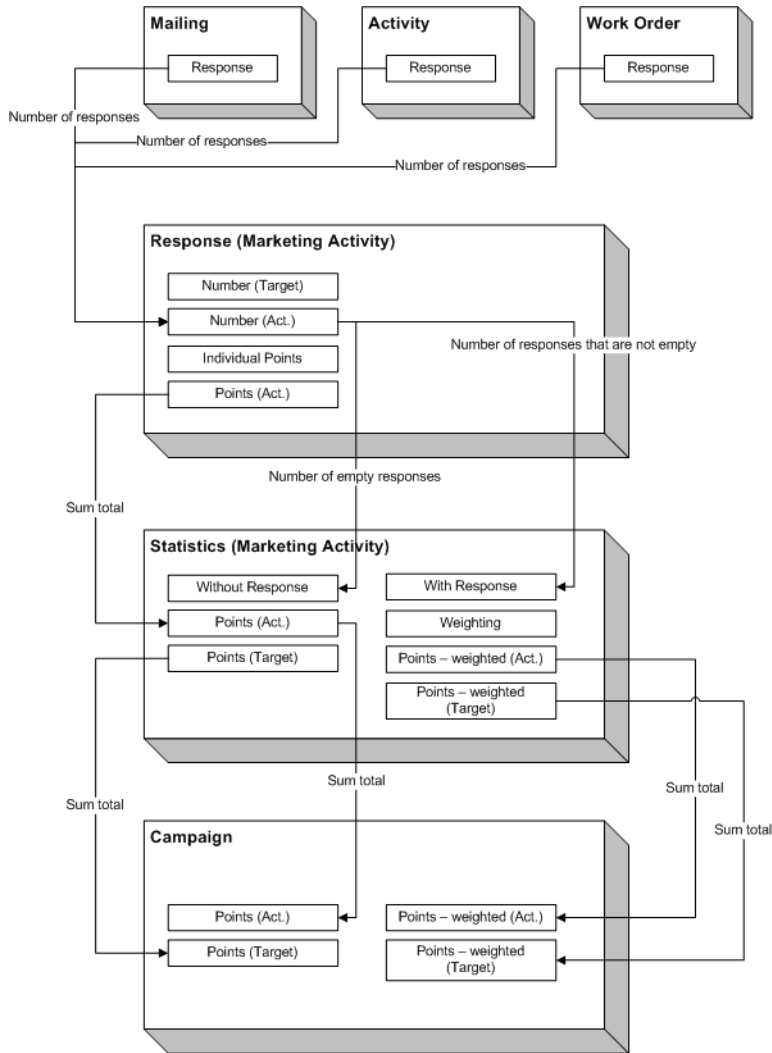
Campaign Graph

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.
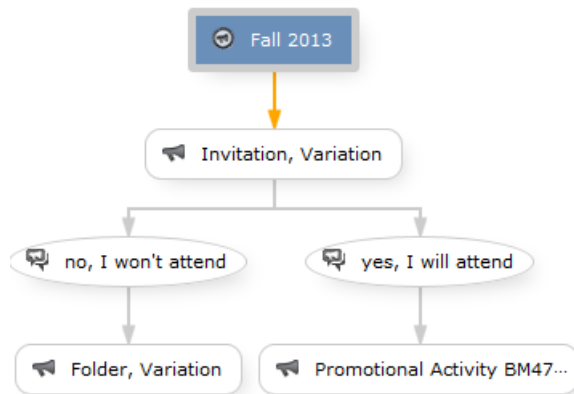
The following options are available:

- 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.

17

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.

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.
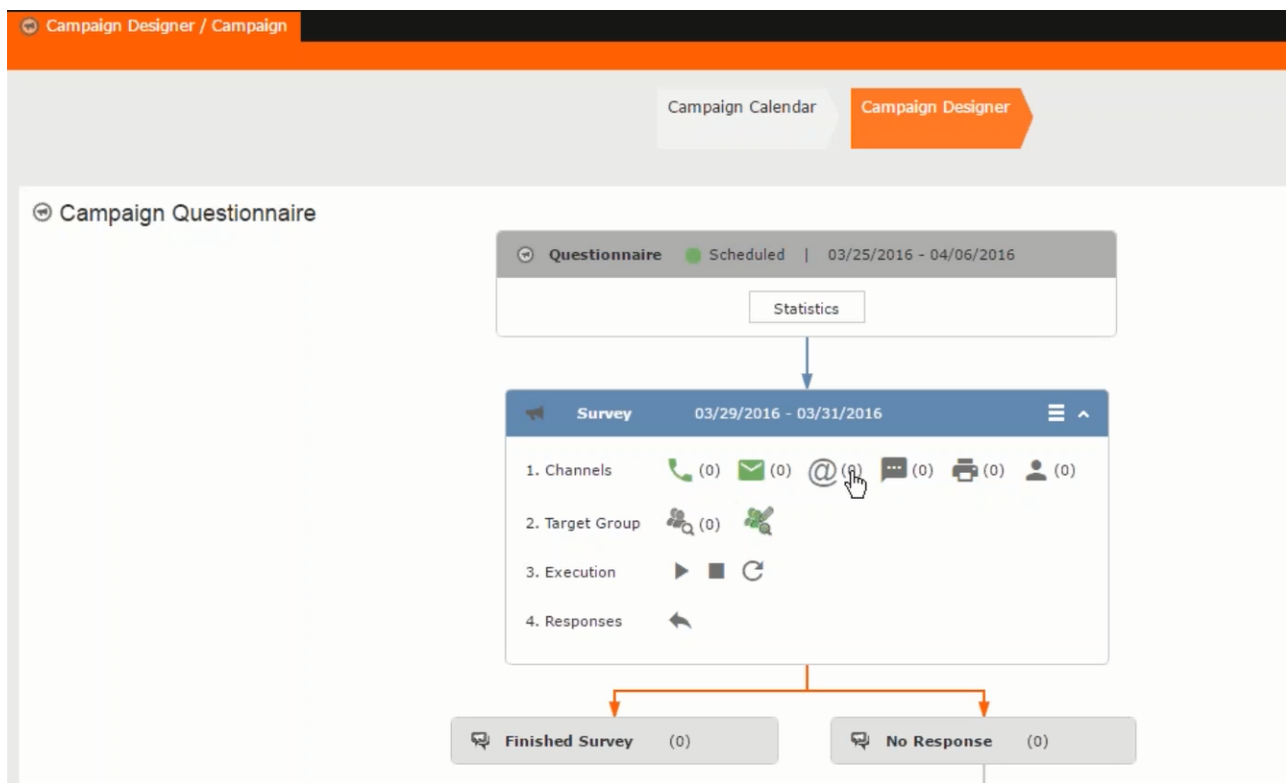
2. The **Search Campaigns** window opens. Enter the required criteria and click **Search**. The search results displays the list of campaigns.

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.

To view an existing campaign, perform the following:

1. Select **Campaigns** from the **Marketing** menu of CRM web.
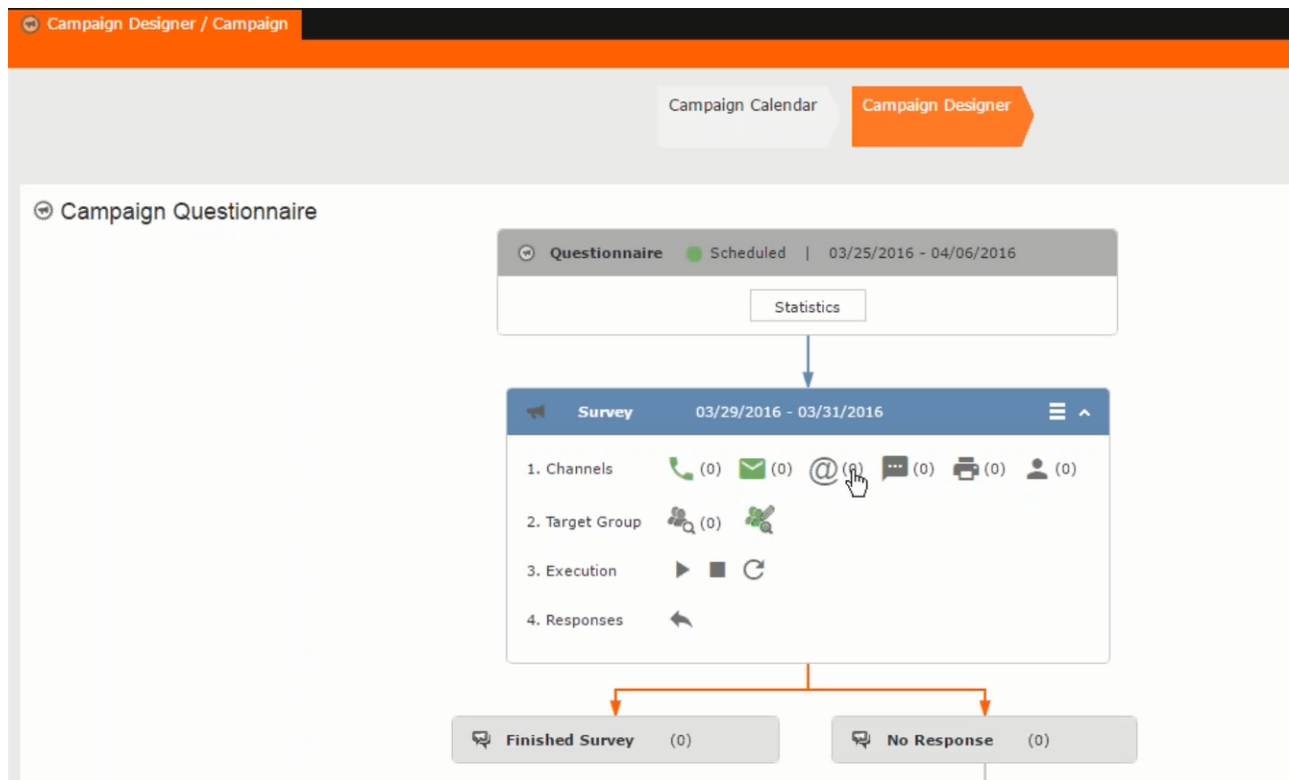
2. The **Search Campaigns** window opens. Enter the required criteria and click **Search**. The search results displays the list of campaigns.

   Notice that the campaigns list shows the status and type of the campaign.

3. Select a campaign and double click it to open it in the campaign designer.
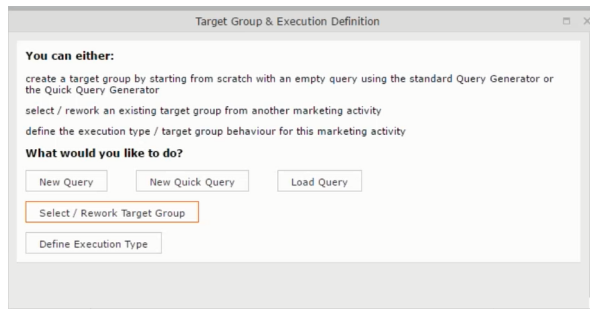
Creating a new campaign from scratch

This topic guides you to create a new campaign from scratch.

To create a new campaign from scratch, perform the following steps:

1. Click the Marketing menu icon, and select **New Campaign** from the menu.

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.

  2. Search for the marketing activities from a campaign and select it from the search list.

  3. Enter a New Start Date for the marketing activity, in the resulting window.

Note: If you do not provide a start date for the marketing activity then the start date on the reused marketing activity is used as start date.

4. Click OK. The marketing activity and its descendent marketing activities are added to the campaign designer.

5. Next you can make further additions to the marketing activity.

• To create a new marketing activity:

1. From the context menu select **New Marketing Activity**. The **New Marketing Activity** window opens.

2. Enter the following details for the new marketing activity:

- **Marketing activity** – Select the marketing activity type from the following: Confirmation, Event, Follow-up, Invitation, Survey, Survey-remainder. (Mandatory field)

- **Starts on** – The start date for the marketing activity.

- **Ends-on** – The end date for the marketing activity.

- **Resp.Rep ID** – The ID of the rep responsible for the marketing activity.

- **Costs** – The estimated cost of the marketing activity.

- **Currency** – Select the currency the cost is estimated in.
- **Text** – Provide a description and other relevant information in this text field.

3. Click **Save** to create the new marketing activity container in the campaign

designer.

Note: A blue arrow points from the campaign container to the marketing activity container.

---

4. In the next step you need to define some responses for this marketing activity.

6. The context menu for the marketing activity container allows you to perform the following: Define responses, Channel and Format definition; Target group and Execution definition; Edit Target group; Notify Rep; Edit/View Responses (Activities); Edit the marketing activity; Delete; Delete (including Generated Record).

In this case we define a response to the survey marketing activity, we have defined.

7. Select **Define Responses** from the context menu. A pop-up window is displayed.

> **Note:** The list of available responses are defined in the catalog entries for marketing activities. If no entries are present you get the catalog entries window and you have to define the response catalog entries in that window.

8. Select the responses you want to define and click **OK**. The responses are added to the graph view under marketing activity container.

Now you can further define the follow-up marketing activity to the responses defined above.

9. To define a follow-up marketing activity, select the **Define Follow-up Marketing Activity** from the context menu for the "**No Response**" container. The **New Follow-up Marketing Activity** window displays.

This window gives you the option to create a new follow-up marketing activity or use an existing one.

10. To create a new marketing activity or to reuse an existing one, perform the sub-steps described in step 5. In this case we add a follow-up marketing activity (**Survey Reminder**) to the **No Response** marketing activity.

11. Next we define the responses to the **Survey Reminder** follow-up marketing activity. Select **Define Responses** from the context menu. The **Responses (Survey Reminder)** window opens.

12. Select **Finished** and **No Response** options and click **OK**.

13. Next we want to send the survey reminder to those who have not responded. This loops the defined actions. To do this, select **Define Follow-up marketing activity** from the context menu of the **No Response** container.

14. Click **Use Existing** button.

Note: Since we want to send a survey reminder from the same campaign named "Questionnaire" we restrict the search content to the **Questionnaire** campaign. By changing the **Context** to **Entire Database** you can search for and add marketing activity from other Campaigns. To do that it is recommended that you use the **Re-use Marketing Activity** function described in step 5.

15. Click **Start Search** and select **Survey Reminder** from the search result.

16. Next a confirmation follow-up marketing activity is added to the **Finished Survey** activity. To do this select **Define Follow-up Marketing Activity** from the **Finished Survey** context menu. To create a new marketing activity, perform the sub-steps described in step 5. In this case we add a new follow-up marketing activity (**Confirmation**) to the **Finished Survey** activity.

Deleting a Campaign from designer

Learn to delete a campaign from designer.

To delete a campaign from a campaign designer:

1. Open the campaign in a campaign designer.

2. Click the context menu from the campaign container.

   ▶

3. Select the **Delete** option. The Question window pops up with the query "Do you really want to delete the selected record(s)?"

4. Click OK to confirm the deletion.

Note: Please note that this deletes the campaign along with all the activities in the campaign.

Viewing the Campaign Statistics

Learn to view campaign statistics.

To view a campaign's statistics:

1. On the Campaign container, click to expand the container. The Statistics button is visible.
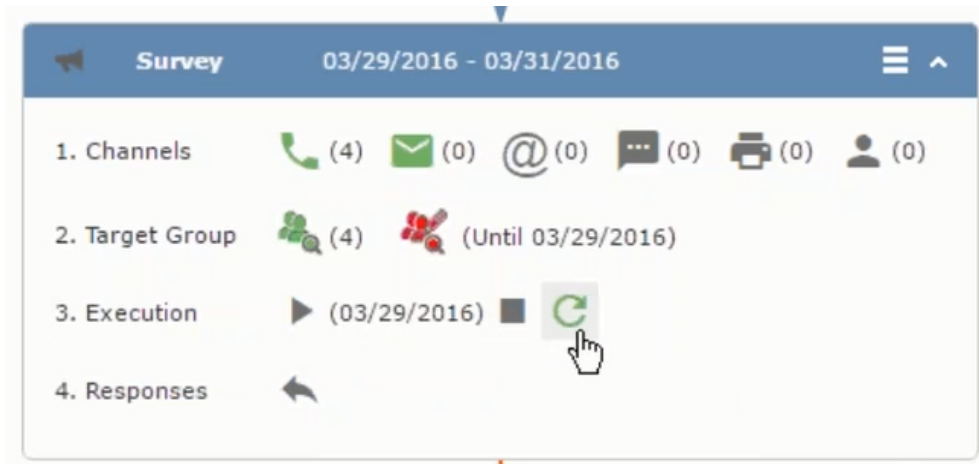
2. Click the **Statistics** button or select **Statistic**s from the campaign container context menu.

Note: The statistics shown in the Statistics window is calculated in the Edit Campaign window, as shown in the screenshot below.

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 498.

3. Defining the execution definition, see page 498.

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.

Person — Speaker Rating

Company — Rating: Accommodation / Bewertung Veranstaltungsort

Attendee — Rating: Accommodation / Rating: Venue

Lecture/Speaker — Lecture Rating

Agenda Item — Lecture Rating / Speaker Rating

Participant Program — Lecture Rating / Speaker Rating

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 u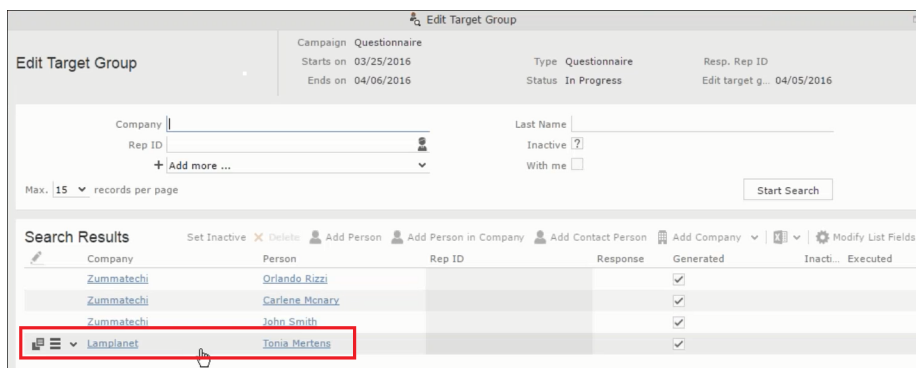ntil which the target group list can be updated. Once the target group is processed then the channels and target group icons has the target group numbers in the brackets besides the respective icons.

   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.

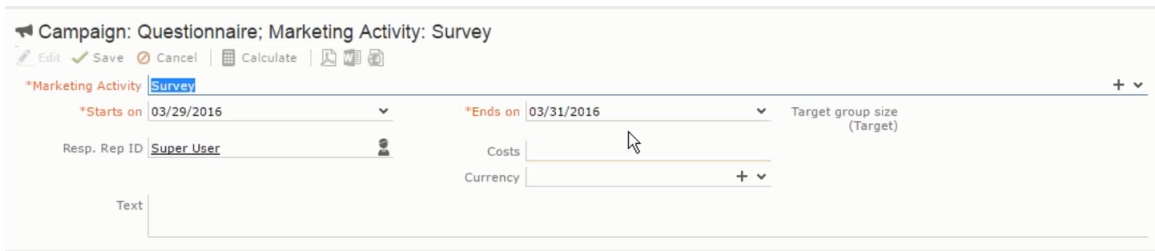## Selecting or modifying the target group

1. Open the required campaign in the campaign designer.

2. On the marketing activity container:

   • Click OK to expand the container.

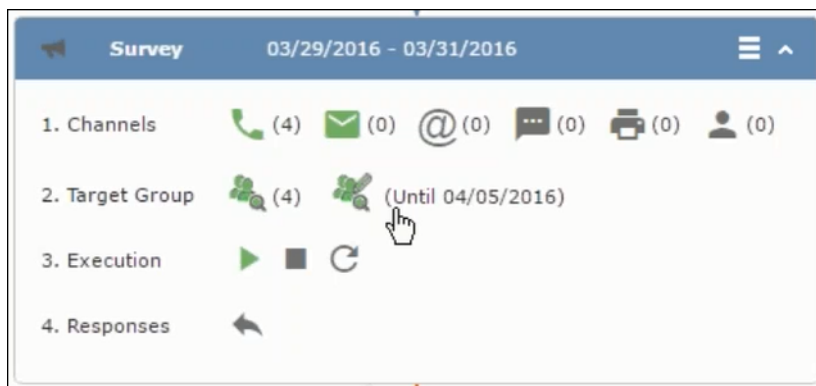   • Click the target group icon to open the **Target Group**

   • 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
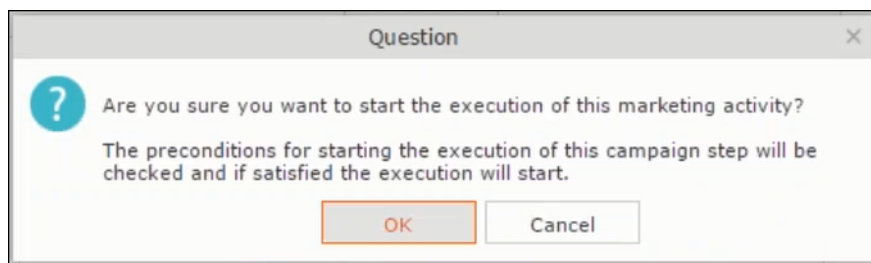
To define an execution type, perform the following:

1. Open the required campaign in the campaign designer.

2. On the marketing activity container:
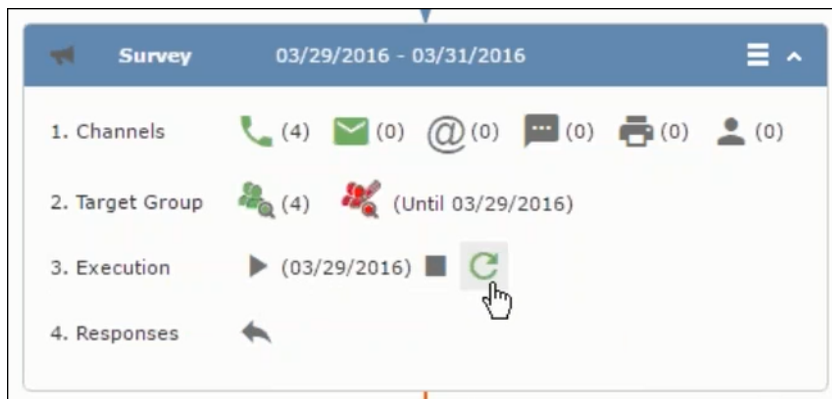
• Click OK to expand the container.

• 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.
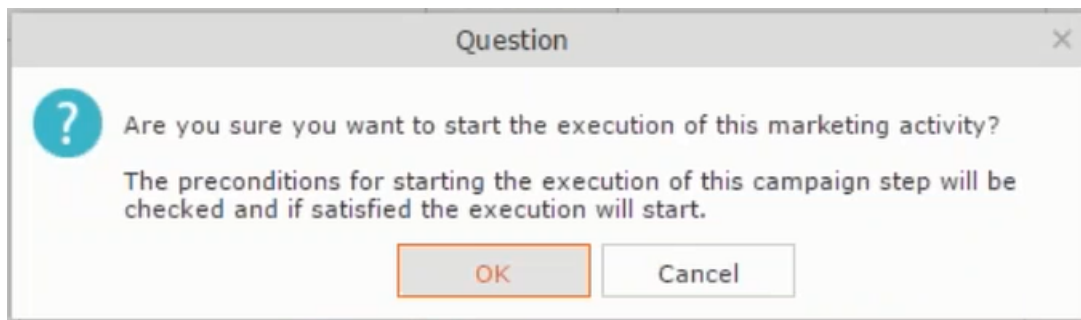

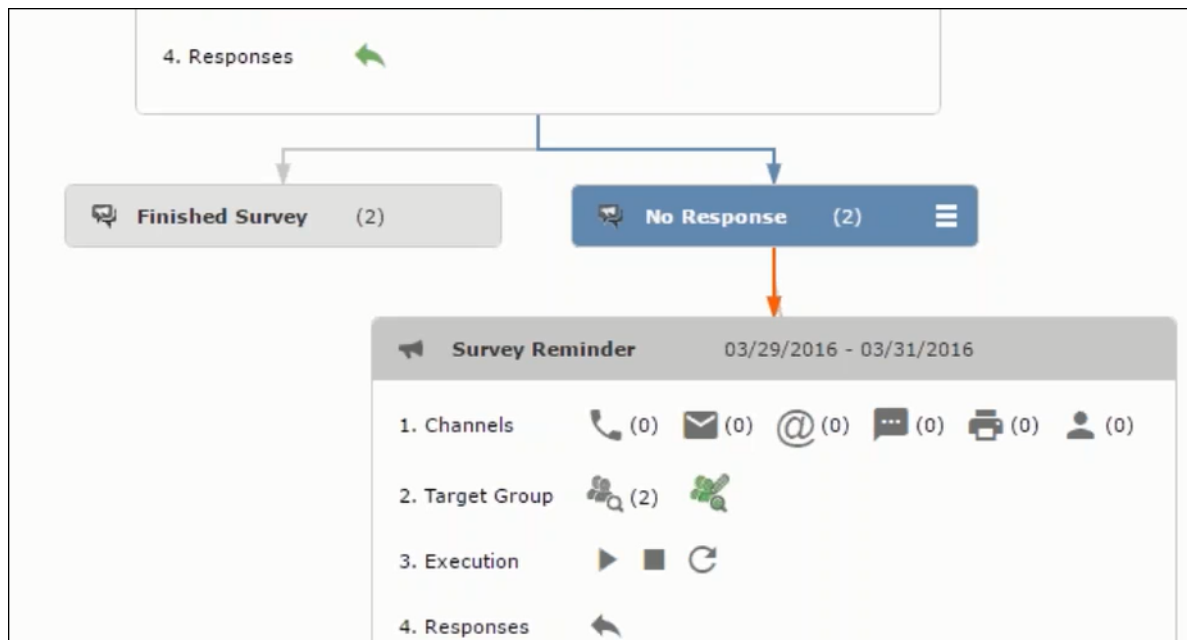Edit the responses for all the participants.

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.

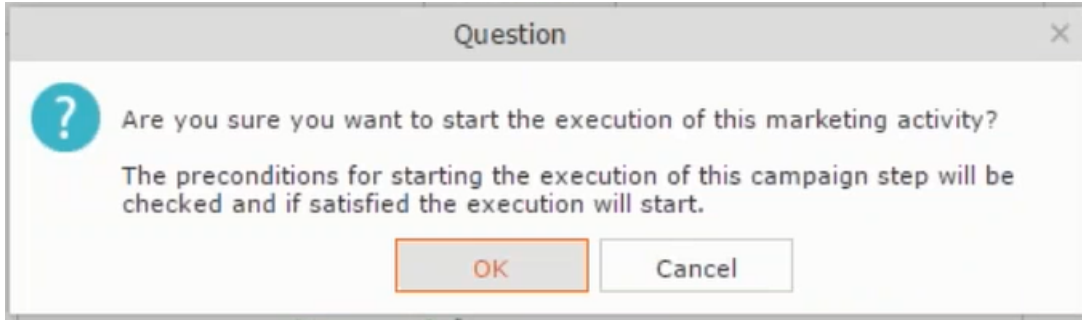You can see that the two members with "No Response" in the **Response** column are listed.

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.
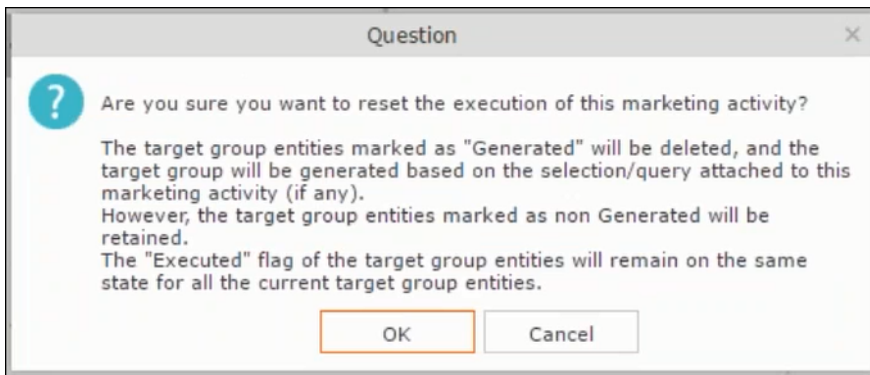

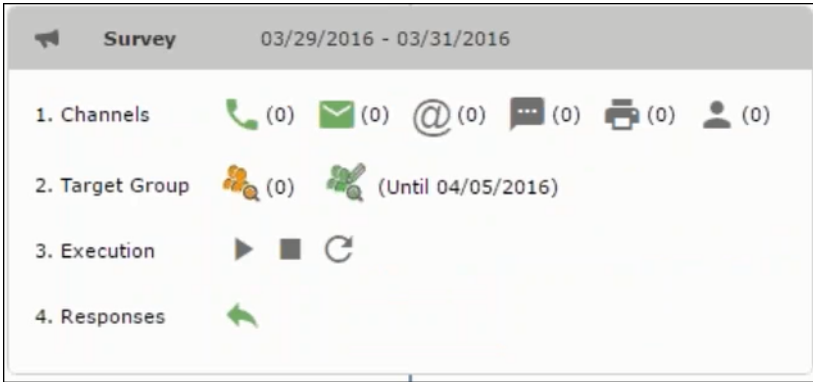The following screenshot shows the **Survey** marketing activity container.

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.
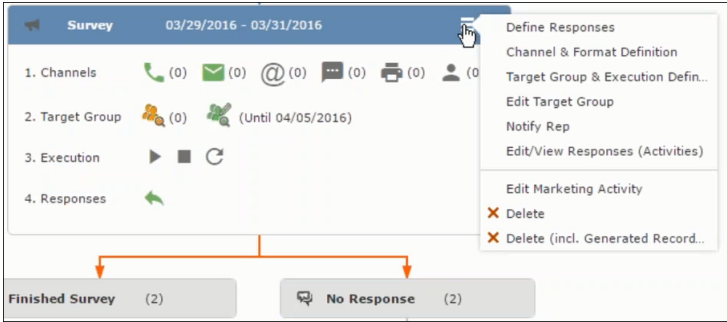
Notice that the Target group button is yellow and once the target group generation is completed, the execution button is active and ready for execution. The colors of the target group icon and execute button are in green.
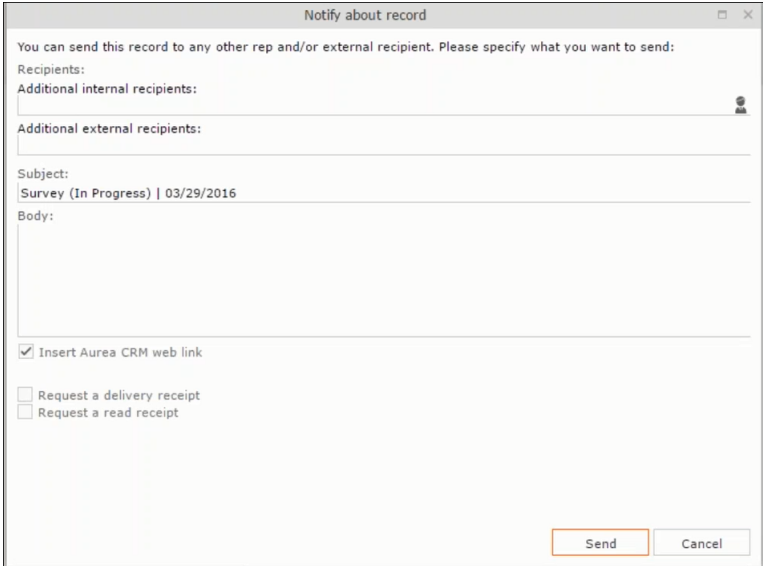
Notifying Reps about a marketing activity

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.

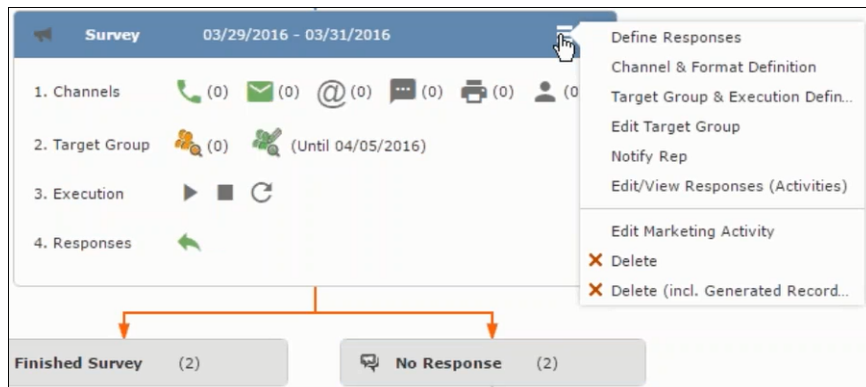Enter the following information:

- **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.

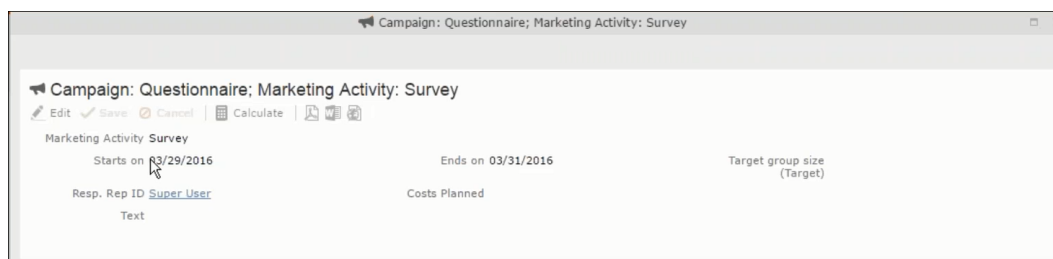3. Click **Send** to send the notification to the selected reps.

Editing a Marketing Activity

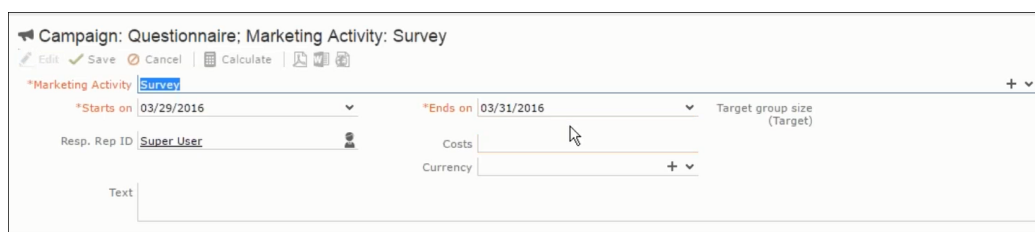To edit a marketing activity, perform the following:

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.

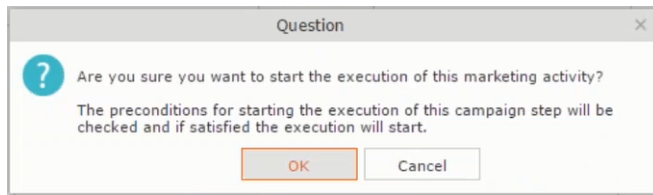4. Click Edit to start editing the marketing activity.

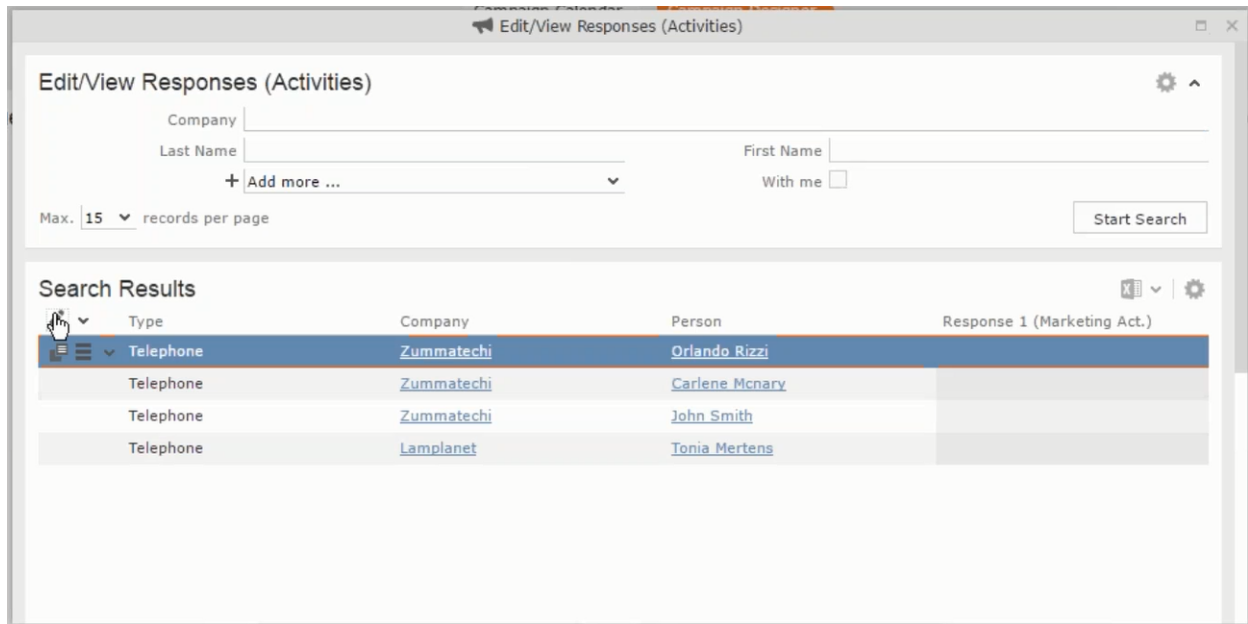5. Make the required changes and click **Save**.

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.
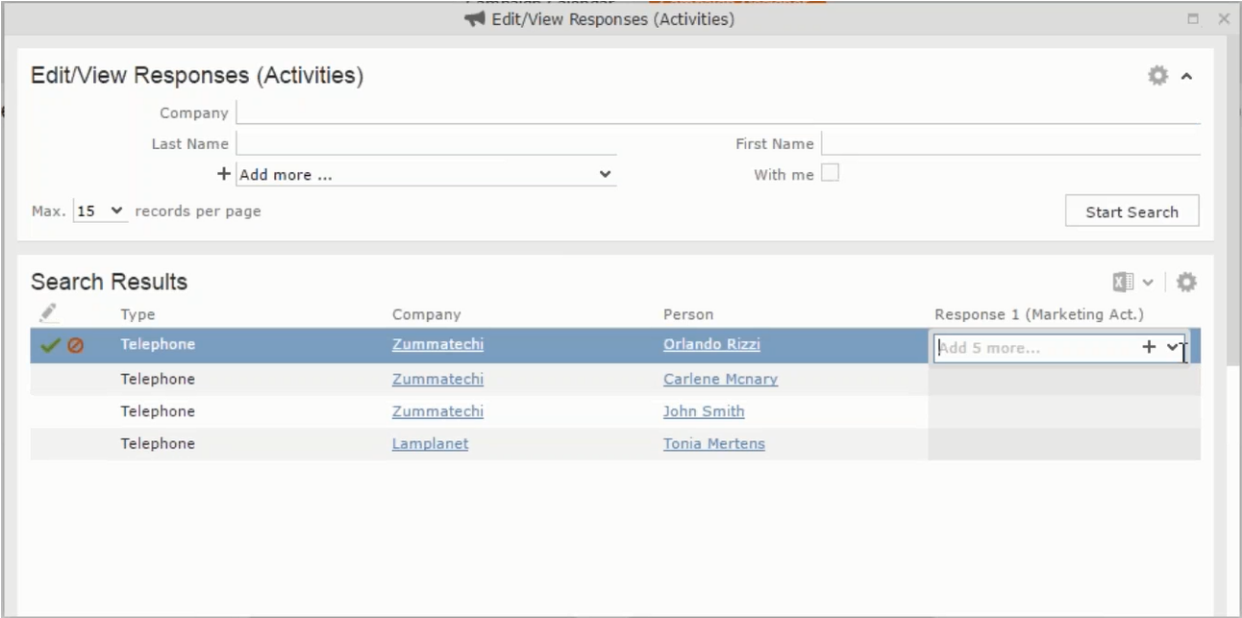
The following screenshot shows the **Survey** marketing activity container.
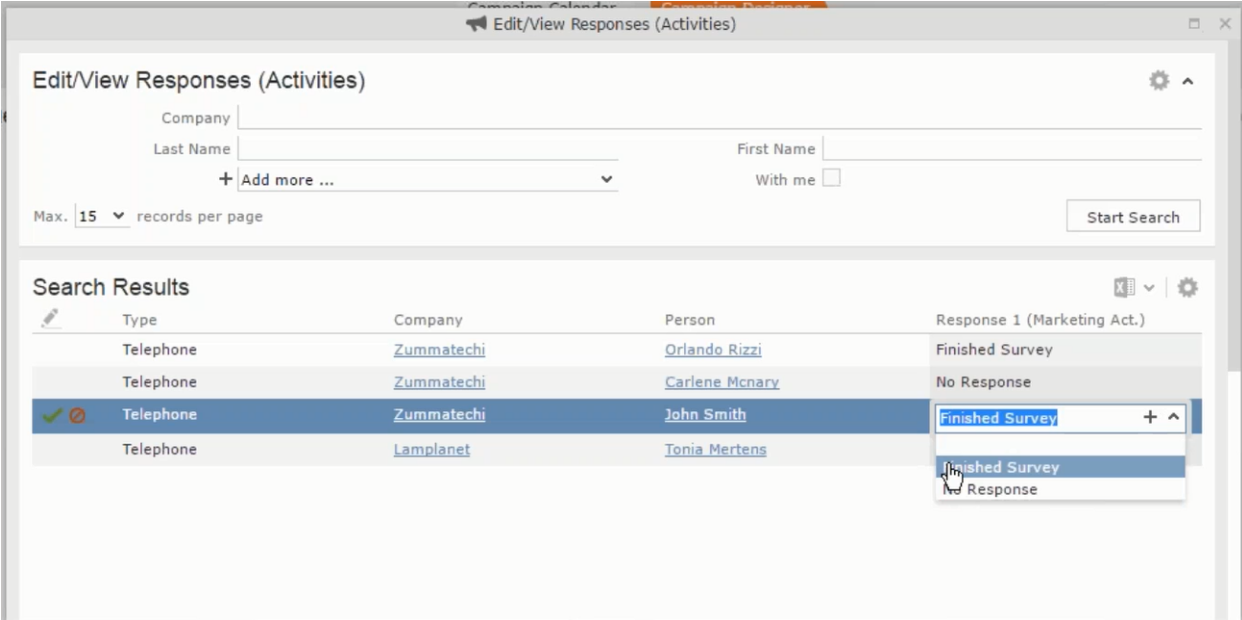

The following is a brief description of the components of a marketing activity:

Channels - The first row shows the available channels of communication for a marketing activity. The following channels are available:
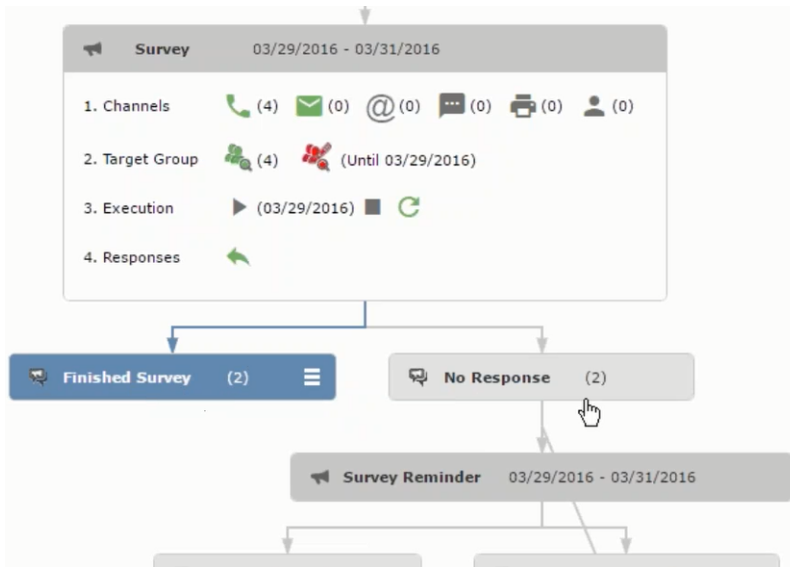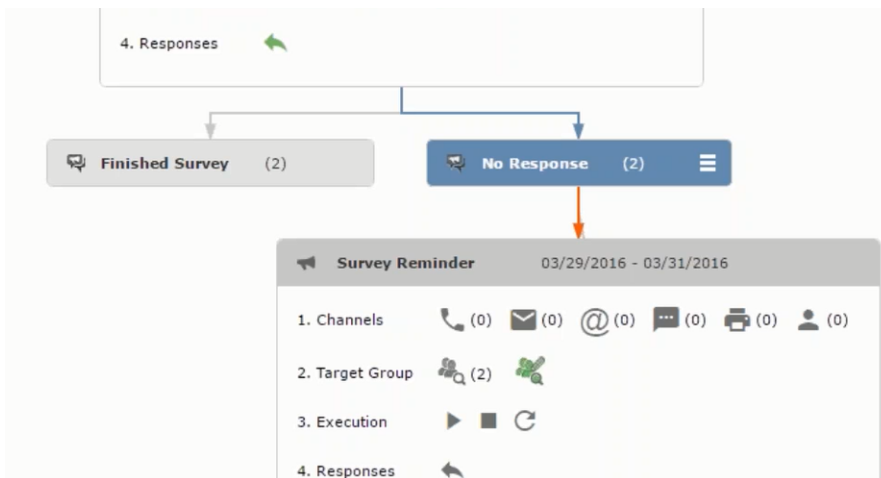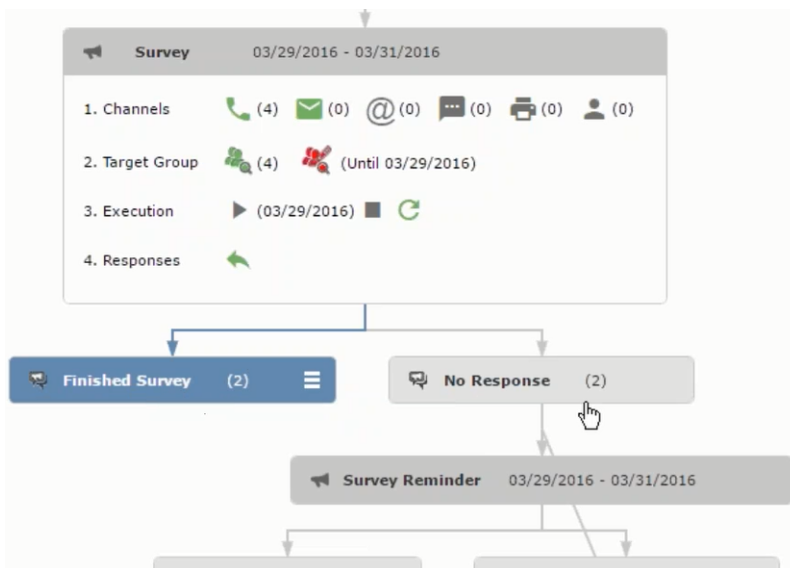
- Phone

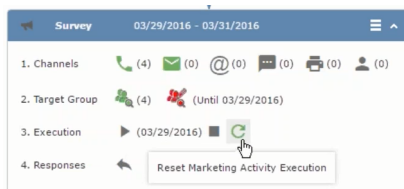

- Letter

- 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.

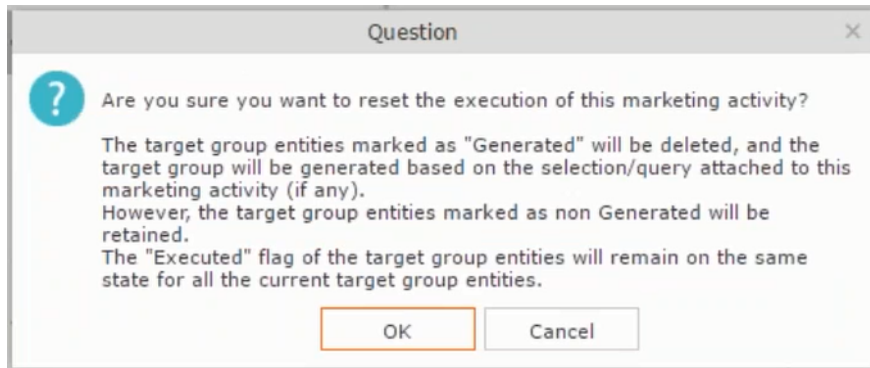The Define Format window opens with tabs for each of the channel you selected. You can define the information required for the message formats required for the selected channels by clicking each of the tabs.
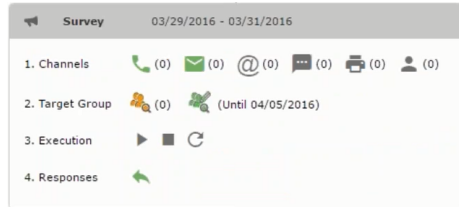
Note: The Phone and In-Person channels do not require and further configuration information. The remaining channels Letter, Email, SMS, and Fax require further configuration information you can define in this window.

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

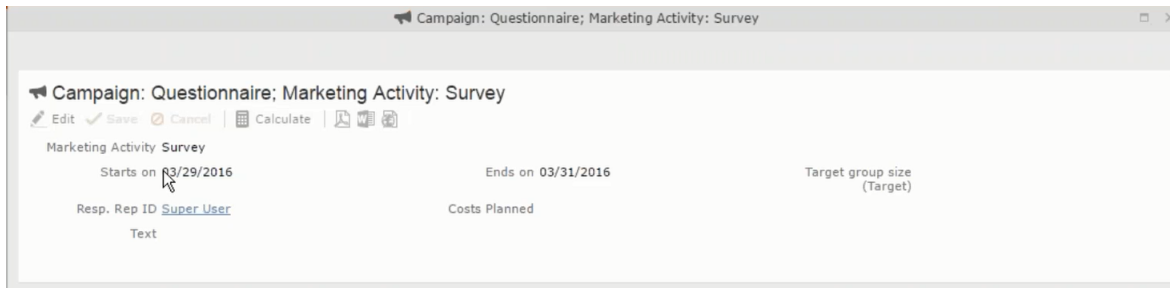To define the channels and formats for a marketing activity, perform the following steps:

1. Open the required campaign in the campaign designer.

2. On the marketing activity container:
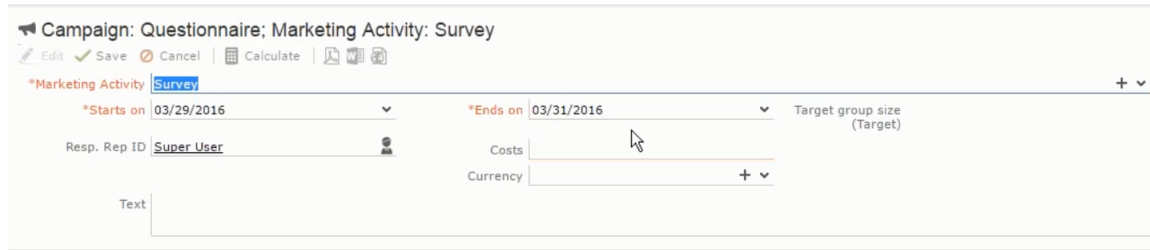
   • Click to expand the container.

   • 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 [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.
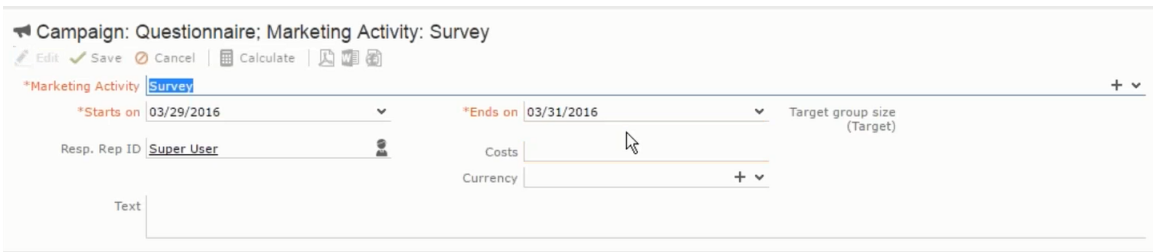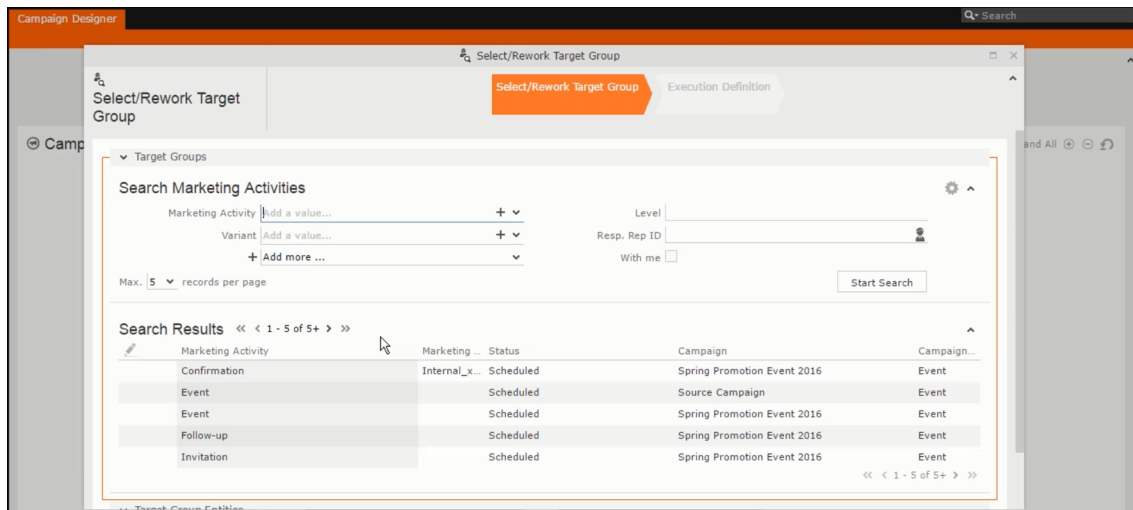

   - The following screenshot shows the **Survey** marketing activity container.

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.

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.
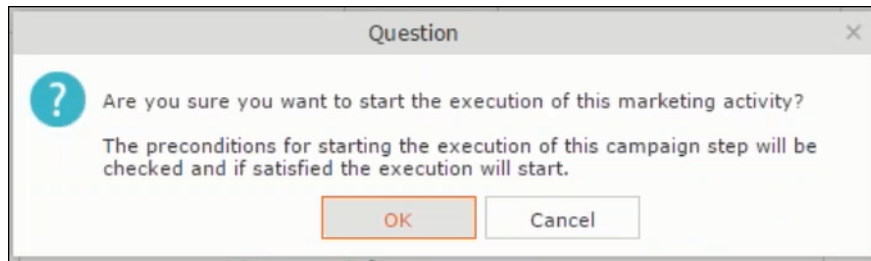

Notice that the Target group button is yellow and once the target group generation is completed, the execution button is active and ready for execution. The colors of the target group icon and execute button are in green.

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 465.

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 456 or Creating a new campaign from scratch on page 457. 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 524.

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 456 or Creating a new campaign from scratch on page 457. The following screenshot shows the example **NewProductLaunchEvent** campaign.
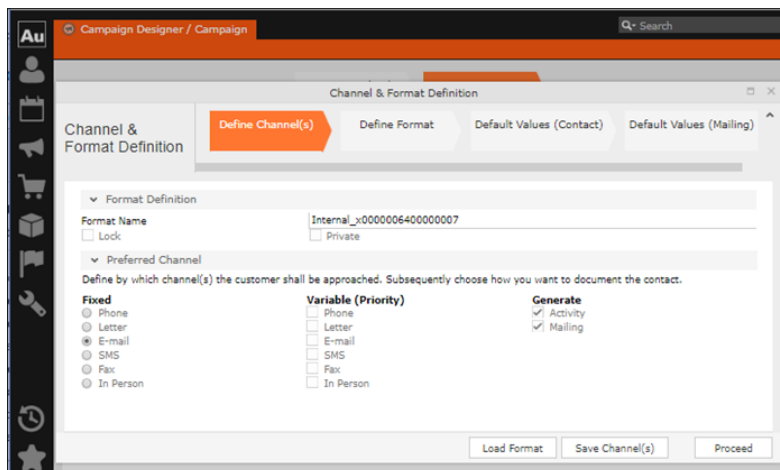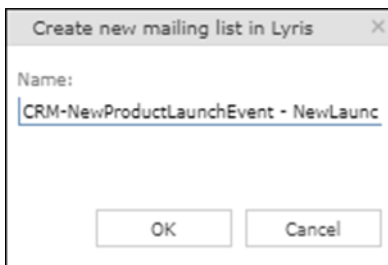

2. From the campaign container context menu select New Marketing Activity. The New Marketing Activity window displays.

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.

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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.
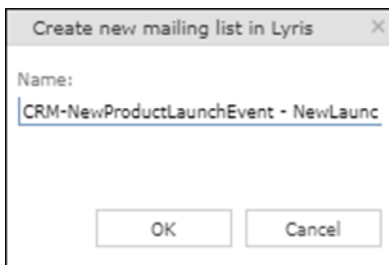
6. The remaining steps are similar to those listed for transferring a marketing activity to Lyris from the campaign designer, see steps 8 to 10 in the topic Transferring from the Campaign Designer on page 524.

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:
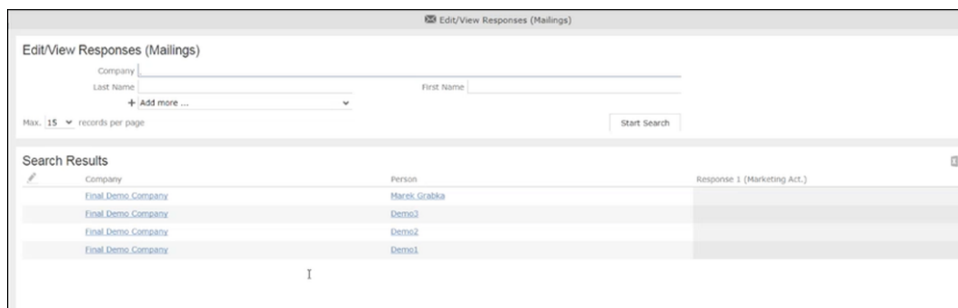
Opening a Mailings records shows the default values set in the Default Values (Mailings) step of the Channel and Format definition, after transferring the marketing activity to Lyris. The default values are visible under the General tab of the Mailings record of the target group member.

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.
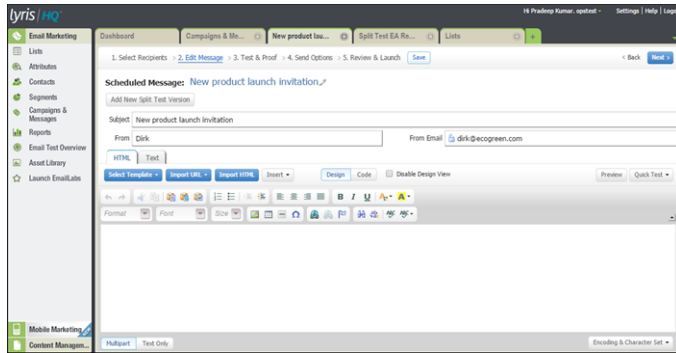
6. You can edit the email.

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.
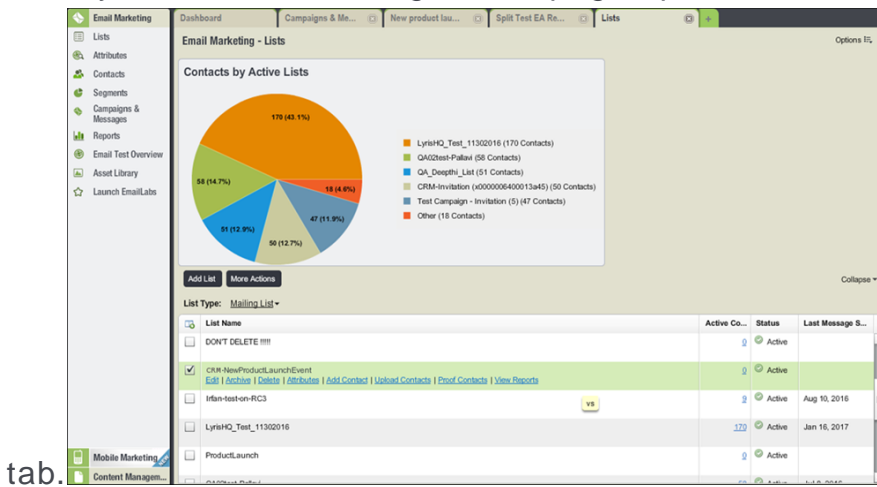
4. Scroll the mailing lists to find the mailing list id created in CRM in the List Name column. See the screenshot above. The mailing list id created in this example is CRM-NewProductLaunchEvent.

   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 498. 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 542.

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.

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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.

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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.

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d. Click OK. The new demographic is created in Lyris.

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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.

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2. Enter the search filters and click **Start Search**. The search results list displays.

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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 542.

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Member **Marie Cole** is deleted from the target group.

Member Marie Cole is moved from **Active Members** list to **Admin Trash** list.

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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. ClickStartSearch 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.

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3. Double click on the task. The task page displays.

The Subject field provides the information about the failed attempt to update the Person record.

4. Click the Details tab. You can find more information about the reasons for the failed activity. Which should inform you about the subsequent actions to take.

In the screenshot above, from the information provided in the Text field you can conclude that the catalog needs to be updated with the new country name. And then the person record needs to be updated with the new country field.

Handling Contact Trashed event

When a target group member's status is set to Trashed in Lyris, a notification message is generated for the responsible Rep of the marketing activity. In the Edit/View target group page, the target group member is set to Inactive, and the checkbox is selected. See the screenshot below:

A pop up in the notification area indicates a new event message. A link to the marketing activity is provided in the Message Information page. The notification contains information about the CRM target group member that was set to Trashed status in the Aurea Campaign Manager. See the screenshot below:

Handling Contact Active event

When an inactive (or trashed) target group member is set to Active in the Aurea Campaign Manager, a notification message is sent to the responsible rep of the marketing activity. In the Edit/View target group page, the target group member is set to active and the Inactive checkbox is unselected.

The Message Information page, contains a link to the marketing activity, it also contains the reasons for setting the target group to active, and the name of the target group member set to Active in the Aurea Campaign Manager.

Handling Contact Bounced event

When Aurea Campaign Manager changes the status of a contact to bounced, the event is received by Aurea CRM and it executes a predefined named trigger. You can define the trigger logic based on your business requirements. For example, a trigger can be executed to set the inactive field to true for bounced target group member. To set up the required trigger, contact your Aurea CRM System administrator.
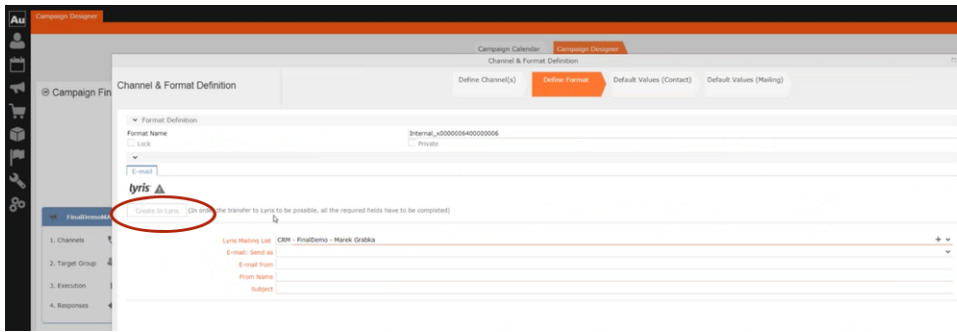
Handling Contact Unsubscribed Event

When Lyris changes the status of a contact to Unsubscribed, the event is received by Aurea CRM and it executes a predefined named trigger. You can define the trigger logic based on your business requirements. To set up the required trigger, contact your Aurea CRM System administrator.

Handling Email Marketing Message Deleted Event

When an Email marketing message is deleted from Lyris, the event is received by Aurea CRM and it executes a predefined named trigger. You can define the trigger logic based on your business requirements. For example, a trigger can be executed to clear the Email properties in Aurea CRM. To set up the required trigger, contact your Aurea CRM System administrator.

A notification message informs the responsible Rep for the marketing activity of the message deletion in the Aurea Campaign Manager. Also, the Create in Lyris button is deactivated and visible in the Define Format tab of the Channel and Format definition page of the marketing activity, as shown in the screenshot below. If required, you can define and save the message format again, before saving it to Lyris.

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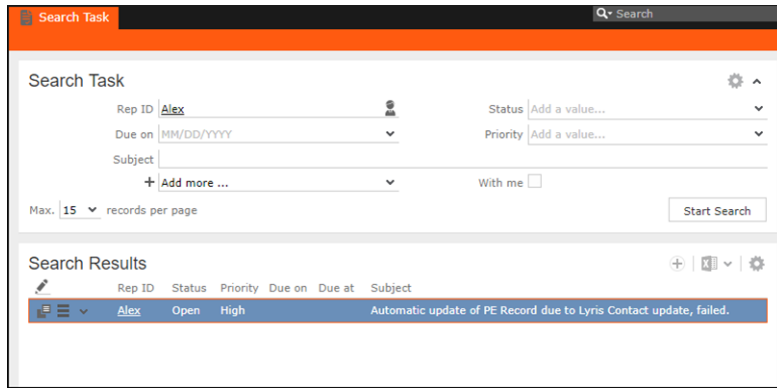

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To illustrate this lets consider a scenario where the contact's demographics property country is updated. This demographics property in the Aurea Campaign Manager is mapped to the field land and its value needs to be selected from a catalog. The Contact's 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.

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In the screenshot above, from the information provided in the Text field you can conclude that the catalog needs to be updated with the new country name. And then the person record needs to be updated with the new country field.

URLs for a Marketing Response – FSI only

You can configure the marketing activity messages to display links for each response type, that the recipients can click to record his/her response.

The steps described in the sections below, assume an example "Invitation" marketing activity. The expected response from the recipient is to 1. Accept the invitation, 2.Reject the invitation, or 3. Call to confirm. Each of the response to the marketing activity could be configured with a URL that correspond to a link that is presented to the recipients of the Invitation email message. In the steps described below, we set the response URL for the Accepted response.

Important: The corresponding email marketing message in the Aurea Campaign Manager should be edited to include the response links, and their URLs should match the values set in Aurea CRM exactly.

Specifying a Response URL from the Campaign Designer

To specify response URLs for a marketing activity from the Campaign Designer, perform the following steps:

1. Click ▤ in the Accepted response. The context menu displays.

2. Select Set Lyris Email Click URL. The dialog displays.

3. Enter the required Response URL. For example, `http://www.aurea.com?response=Accepted`.

Note: Use the Clear button to clear any long URL value set previously.

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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.

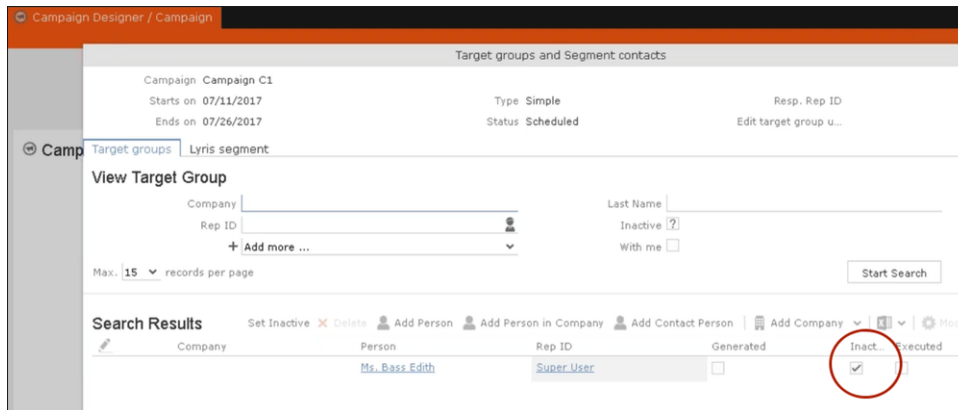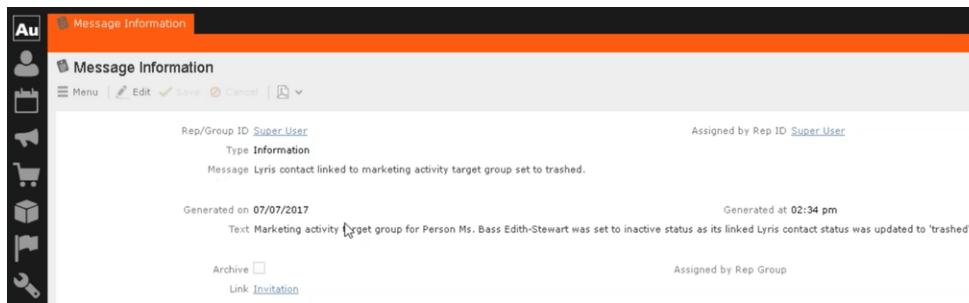2. Enter the search filters and click Start Search. The search results list displays.

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**

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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 an agenda, >> Planning Events on page 568.

- Approval: The responsible persons verify and approve the event (its budget and/or compliance-relevant aspects), >> Approving Events on page 572.
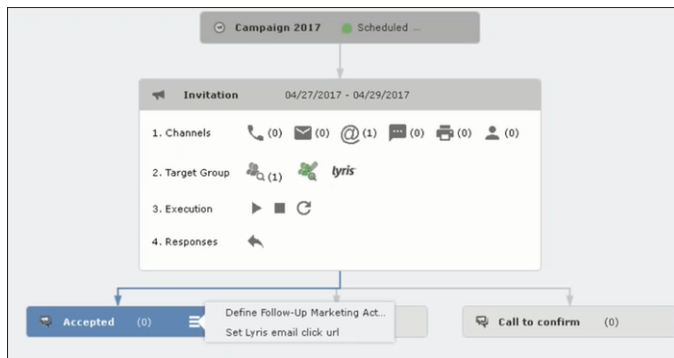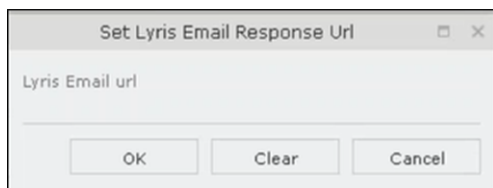
- Execution: Generate the target group, add any necessary additional customers to the target group, send out invitations, administrate the participants and organize hotels, transfers etc., >> Executing Events on page 574.

- Follow-up: You can evaluate the event and calculate the costs, >> Rating Events on page 576 and Monitoring Event Costs on page 578.

Your administrator can define campaign templates that support you in planning and managing your events. These campaign templates can already include marketing activities, responses and follow-up activities (e.g. responding "Yes, I will attend", to an invitation automatically assigns the respondent to the follow-up activity "Event" and automatically adds a participant record).

If the event is held at an external venue (e.g. a hotel), the venue must be entered as a company in the Aurea CRM database. Furthermore, all participants including speakers must be present as persons in the database.

For general information on campaigns and marketing activities, >> Marketing Activities on page 423. Functions specific to events are described in the following sections.

Planning Events

To plan an event:

1. Add a new campaign, >> Adding Campaigns on page 421.

2. Enter yourself in the **Resp. Rep ID** field 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), >> Defining Marketing Activities on page 428.

4. Add marketing activity responses to the activities and select the corresponding follow-up marketing activities for the responses.

The values in the **Registration** and **Participation Status** fields of marketing activity responses are used to manage the marketing activity's participants, >> Managing Participants on page 575. The records in the original target group are distributed amongst the follow-up marketing activities.

Example: The event "Customer Event Q3" consists of the initial marketing activity "Invitation". This marketing activity has two follow-up marketing activities: "Event" and "Mailing". The "Event" marketing activity in turn has two follow-up marketing activities: "Survey" and "Brochure":

The following responses need to be defined for the corresponding marketing activities in order to assign respondents to the correct follow-up activities and manage the participants' **Registration** and **Participation Status**, >> Responses on page 429.

- Responses to the "Invitation" marketing activity:

  - Response "Yes, I will attend": **Follow-up Marketing Activity** "Event" and **Registration** = "Register"

  - Response "I can't make it": **Follow-up Marketing Activity** "Mailing", **Registration** = "Unregister"

- Responses to the "Event" marketing activity:

  - Response "Attended": **Follow-up Marketing Activity** "Survey" and **Participation Status** = "Participated"

  - Response "Did not attend": **Follow-up Marketing Activity** "Brochure" and **Participation Status** = "Missed"

5. Enter the details of the hotels and venue, >> Hotels and Venues on page 570.

6. Enter information on any required equipment in the **Equipment** info area, >> Adding Equipment on page 570.

7. Add the agenda, >> Creating an Agenda on page 571.

8. Select speakers and lecture topics, >> Adding Speakers on page 571 and Adding Lecture Subjects on page 570.

9. Create a query that returns the persons and companies that should attend the event, >> Queries on page 123. You can also add participants manually.

10. Switch to the marketing activity, select **New/Edit Execution** from the context menu and determine how the marketing activity should be executed, >> Defining How the Activity is Executed on page 431.

11. Ask for quotes and enter the estimated costs of the event in the **Costs: Entire event** field of the campaign.

12. Execute the event, >> Executing Events on page 574.

Hotels and Venues

Add hotels, venues and other partners (e.g. catering, entertainment) as companies in Aurea CRM and assign a company type (e.g. "Hotel").

Enter the corresponding company in the **Event Location** field in the marketing activity.

Adding Equipment

If your event requires special equipment not available at the venue, you can enter information on the equipment.

1. Select **New > New Equipment** from the marketing activity or campaign's context menu.

2. Enter the equipment's details, such as the type of **Equipment**, the associated **Costs**, the required **Quantity** etc.

3. Save the record.

Adding Lecture Subjects

Add topics available for all events in the **Lecture Subject** info area.

To add a new lecture subject:

1. Select ![icon] (**Marketing**) > **Topic**.

2. Click on **Start Search** and then on ⊕ (**New**).

3. Enter details on the topic, such as the field, duration and whether the topic represents a lecture or training subject.

4. Save the record.

Adding Speakers

Add speakers to Aurea CRM as persons and enter a **Person Type** (e.g. "Speaker") on the **Speaker** tab.

If you know this information, you can also enter the speaker's **Fee** and **Travel flat rate**.

Assigning Speakers to Lecture Subjects

To assign a subject to a speaker:

1. Switch to the desired person.

2. Select **New** > **New Lecture / Speaker** from the context menu.

3. Select the **Topic**.

4. Save the record.

Creating an Agenda

You can add an agenda for each marketing activity 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. Select **New** > **New Agenda Item** from the marketing activity's context menu.

Note: You can add agenda items to campaigns for events consisting of only a single track.

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2. Select the speaker:

a. Click on 🔍 (**Select**) to the next to the **Person** field.

All persons entered as speakers in the database are listed.

b. Select the desired person.

3. Select the **Lecture Subject**.

If you have already selected a person, only those lecture subjects assigned to the selected person are listed. If you have not selected a person, all lecture subjects are listed.

4. Enter further information, such as the time and location.

5. Switch to the **Speaker** tab to enter further information such as the date of the invitation, the date of confirmation and fee.

6. Save the record.

Approving Events

Depending on your internal organization, events may require approval or verification that they comply with legal provisions.

Approval consists of two steps:

1. The rep submits the event for approval, >> Requesting Approval/Verification on page 572.

2. The event needs to be approved or verified by the responsible rep, >> Approving/Verifying Events on page 573.

   • Budget 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", you cannot execute the campaign. 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 must submit the campaign for approval.

To submit an event for approval:

1. Switch to the desired campaign.

2. Switch to the **Approval & Control** tab.

3. Enable the **Budget approval required** check box and enter the person responsible for approving the event in the **Budget Approved by ID** field.

4. Enable the **Verification Required** check box and enter the person responsible for verifying the event complies with legal provisions in the **Verified 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. Your administrator can determine that campaigns requiring approval or verification are displayed on the responsible rep's start page, for example.

   You will receive a massage when the campaign has been approved or verified.

Approving/Verifying Events

If you are responsible for approving or verifying events, you will be informed using a To-Do record whenever a campaign has been submitted.

By default, Aurea CRM web lists campaigns requiring your approval on the start page (**You have x To-Do(s)**).

To approve or verify a campaign:

1. Select **Expand Linked** from the To-Do record's context menu.

   The campaign is opened. Check the data (e.g. whether the campaign is within budget or that legal provisions are met).

2. Select **Approval** > **Positive** or **Verification** > **Positive** from the menu.

   The campaign is approved or verified, and the event can be executed.

3. Save the record.

   A message is sent to the campaign's rep, informing them that the event has been approved/verified.

Retracting Approval and Rejecting Events

If you have approved an event, you can retract your approval or verification at a later date.

To do so:

1. Switch to the desired campaign.

2. Select **Approval** > **Negative** or **Verification** > **Negative** from the menu.

3. Save the record.

   The rep responsible for the campaign is sent a corresponding message.

Executing Events

To execute an event:

1. Switch to the marketing activity you wish to execute.

2. Add the event's participants, >> Adding Participants on page 574.

3. You can determine which lectures participants will attend, >> Creating a Participant Program on page 575.

4. Upon receiving responses, e.g. to invitations, enter the responses, >> Managing Participants on page 575.

5. Once the event has been held, you need to enter whether participants actually attended the event, >> Editing Generated Records on page 441.

Adding Participants

Event participants are added to marketing activities. Participants can be added automatically based on a selection or query, or can be added manually. For example, the participants of a follow-up marketing activity defined for a response can be generated based on their participation status (e.g. "Registered" or "Participated").

Note: You can also add participants to a campaign. However, these participants are not taken into account when automatically generating marketing activities (e.g. follow-up activities). Only records added directly to marketing activities are taken into account.

To add participants manually:

1. Switch to the desired marketing activity or campaign.

2. Select **New** > **New Participant** from the context menu.

3. Enter details on the participant, e.g.:

- The type of participant (e.g. participant or speaker), 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, costs etc.

- Enter information on the **Travel Information** tab such as the date of arrival and departure, mode of transportation, whether a transfer is required etc.

4. Save the record.

Executing Events

Creating a Participant Program

To create a program for individual participants, add a participant program:

1. Switch to the desired marketing activity or campaign.

2. Switch to the desired participant (select **Go to All Related** > **All Participants** from the context menu).

3. Select **New Participant Program** from the context menu in the participant record.

4. Select an **Agenda Item**.

5. Save the record.

Managing Participants

You can manage participants for each marketing activity in two ways:

- By changing the **Participation Status** in the participant record (Registered, Confirmed, Canceled, Participated, Missed).

- By entering responses in the generated activities, mailings or work orders. Depending on the **Registration**, **Participation Status** and **Follow-up Marketing Activity** defined for the responses in the planning phase (>> Planning Events on page 568), participants are added or edited automatically:

  - **Registration** field:

    - Register: A target group and participant record are automatically added (**Participation Status** = "Registered" and **Registered on** = current date) for the follow-up marketing activity entered (e.g. the event).

    - Unregister: A target group record (but **no** participant record) is automatically added for the follow-up marketing activity entered (e.g. the mailing).

  - **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 (e.g. survey).

    - 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 (e.g. brochure).

- 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 for the follow-up activity (event) 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. 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. Switch to the participant record.

2. Select **Go to All Related** > **All Participant Programs** from the context menu.

   All agenda items entered for the participant in the participant program are listed.

3. Select an agenda item and enter the rating from the questionnaire in the **Speaker Rating** and **Lecture Rating** fields.

Note: As evaluations are often anonymous, your administrator can determine that you can also enter anonymous ratings for agenda items. In this case, you need to enter the remaining sum total of all ratings and the number of anonymous evaluations in the additional fields.

Rating the Venue and Hotels

Enter the rating of the venue and accommodation in the participant record.

To rate the venue and hotel:

1. Switch to the desired marketing activity or campaign.

2. Switch to the desired participant (select **Go to All Related** > **All Participants** from the context menu).

3. Enter the rating of the venue in the **Rating: Venue** field.

4. Switch to the **Hotel** tab and 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.
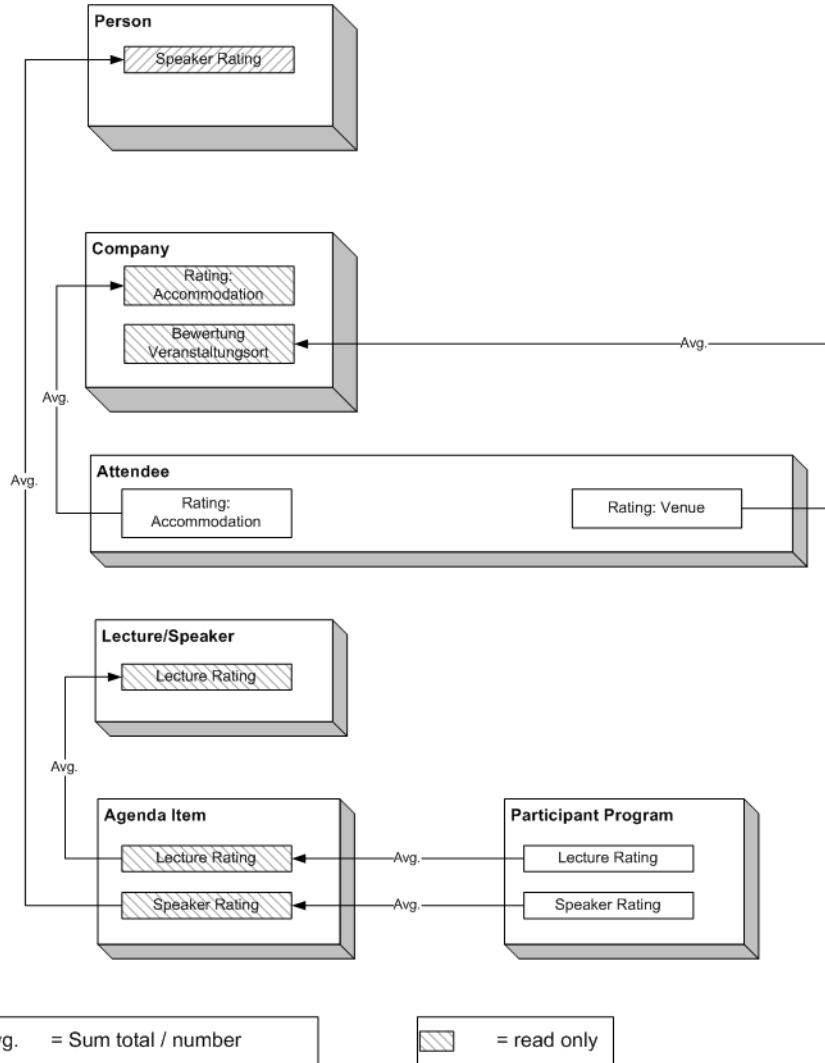
Monitoring Event Costs

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 displayed 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.

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.

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Customer Service

You can depict the activities of your customer service department in Aurea CRM web, e.g:

• Handling tickets (inquiries, complaints, bug reports)

• Assign tasks to service employees while taking into account their availability and qualifications

• Add offers and orders to tickets

• Transfer information from service contracts to offers and orders

You can add child records to tickets and service contracts such as participants, appointments, tasks, offers, orders etc.

Tickets

You can store information on issues a customer has in tickets, including the cause, solution, appointments etc. Further important information can be linked to the ticket, e.g. the product concerned, the end customer, further participants etc.

Adding Tickets

To add a new ticket in the default version of Aurea CRM web:

1. Select (**Products & Service**) > **New Ticket**.

   The mask used to add new tickets is displayed.

2. Click on (**Select**) next to the **End Customer Company** and **End Customer Person** fields to select the affected company and person. These fields use the find as you type function.

   Note: You need to select an end customer (company or person) in order to save the ticket.

3. Click on (**Select**) next to the **Contact Company** and **Contact Person** fields to select the company or person that is your contact partner if this is not the same as the end customer.

4. Enter the number of the ticket in the **No.** field and select the **Priority**.

5. Enter a **Subject** for the ticket.

6. Select the **Status**, **Service Level** and **Type**.

7. Click on 🔍 (**Select**) to the right of the **Link** field to link the ticket to an installed base.

8. Select the **Problem Group** and **Problem** and/or the **Item No.** and **Item name**.

9. Enter a description in the **Problem Description**, **Cause** and **Solution** fields.

10. Click on 👤 (**Select Rep**) next to the **Processed by ID** to enter the rep responsible for processing the ticket. Once a rep has been selected, the **Processed by ID** field is filled in automatically. The **Created by** and **Created on** fields are also filled in automatically when saving the record.

11. Enable the **Escalate Tasks** check box to determine that the superior of the responsible rep receives a message if the ticket is not processed on time.

12. Enter the date the ticket is due for completion in the **Due on** field.

13. Click on 🔍 (**Select**) next to the **Predecessor** field to determine the ticket's predecessor if this ticket is a sub-ticket of an existing ticket, >> Adding Sub-tickets on page 581.

   You can display the ticket hierarchy, >> Displaying Hierarchies on page 587.

14. Save the record.

Note: Predefined participant records may be added automatically depending on your configuration.

Adding Sub-tickets

You can add sub-tickets to existing tickets, allowing you to create a ticket hierarchy.

When adding a new ticket, you can determine the ticket's predecessor (i.e. the parent ticket) in the **Predecessor** field. You can also add new sub-tickets from existing tickets.

To add a sub-ticket to the current ticket:

1. Switch to the ticket you want to add a sub-ticket to.

2. You can add the sub-ticket in the following ways:

   • Select **New** > **Sub-Ticket** from the context menu.

   • Switch to the **Sub-Tickets** tab and click on ⊕ (**New Sub-Ticket**).

   The mask used to add new tickets is displayed. The **Predecessor** ticket is entered automatically.

3. Enter the ticket's details.

4. Save the record.

Linking Tickets to an Installed Base

You can link tickets to an installed base in the default version of Aurea CRM web. If a service contract with items exists for the installed base, you can create a service offer and transfer the items in the service contract to the new offer.

To link a ticket with an installed base:

1. Switch to the desired ticket.

2. Click on 🔍 (**Select**) to the right of the **Link** field and select the installed base you want to link the ticket to.

3. Save the ticket.

The ticket is linked to the installed base.

Adding Tickets from an Installed Base

You can add tickets to an installed base.

To add a ticket to an installed base:

1. Switch to the desired installed base.

2. You can add the ticket in the following ways:

- Select **New** > **New Ticket** from the installed base's context menu.

- Switch to the **Tickets** tab and click on ⊕ (**New Ticket**).

The mask used to add new tickets is displayed, >> Adding Tickets on page 580. The installed base is entered in the **Link** field in the ticket.

Escalating Tickets

You can determine that tickets are escalated if the responsible rep has not dealt with the ticket by the deadline. If you are using Aurea CRM web, CRM.server needs to be running in order to escalate tickets.

To define that a ticket should be escalated if not completed by the deadline:

1. Enable the **Escalate To-Do** check box.

Upon saving the ticket, the date and time entered in the **Due on** and **Due at** fields are transferred to the To-Do Until Date and To-Do Until Time fields.

2. Enter the rep who should receive the escalation message in the **Resp. Rep** field of the ticket.

If the **Status** of the ticket has not been set to "Closed" by the deadline, this rep receives a message.

If you wish to add several tasks to a ticket and escalate the ticket if at least one task has not been completed on time:

1. Add all the necessary tasks to the ticket, >> Appointment Management on page 252.

Note: Your administrator needs to define that tasks can be added to tickets. In Aurea CRM win, this is defined in the desktop settings, >> Link tab in the Aurea CRM win Administrator Guide.

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2. Assign each task to a rep and enable the **Create To-Do** check box in the task record.

3. Enter the rep to receive an appropriate escalation message in the **Resp. Rep** field of the ticket.

4. Enable the **Escalate To-Do** and Escalate Tasks check boxes in the ticket. The date and time entered in the Due on and Due at fields in the ticket are transferred to the To-Do Until Date and To-Do Until Time fields. You can edit the date and time.

5. Save the ticket.

   If not all the tasks have been completed by the date and time specified in the **To-Do Until Date** and **To-Do Until Time** fields, the rep entered in the **Resp. Rep** field receives a message.

Adding Installed Bases

The **Installed Base** info area allows you to store the products currently used by a customer. Records can be added manually or imported.

To add an installed base:

1. Select (**Products & Service**) > **New Installed Base**.

2. Switch to the company you wish to add the installed base for.

3. You can also link an installed base to a property or opportunity. To do so, click on 🔍 (**Select**) next to the corresponding field.

4. Enter the details and save.

5. Add an installed base item for each product in the installed base (select **New** > **New Installed Base Item** from the context menu).

Service Contracts

Use service agreements to determine what services were agreed upon with your customer for a product. Services are defined in service level agreements (SLA). SLAs define the time span during which an inquiry must be answered or a problem must be solved, the associated costs etc.

Service agreement items are added to a service agreement. Usually, a service agreement item is added for each product the service agreement covers. You can create a service offer based on a service contract. Information in the service contract and the service contract items are copied to the service offer.

You can add other child records to service contracts, e.g. participants, or you can create a service offer based on a service contract.

Adding a Service Contract

To add a service contract:

1. Select (**Products & Service**) > **New Service Contract**.

2. Switch to the company you wish to add the service contract for.

3. Enter the service contract's details.

   a. Click on 🔍 (**Select**) next to the **Service Contractor Company** field to select the company responsible for providing the service.

   b. Click on 🔍 (**Select**) next to the **Company Billing Address** field to select the company that will be invoiced for the service.

   c. Enter the number of the service contract and select a **Type**.

   d. If the service contract was created from an offer, the offer is entered in the **Offer** field. Click on 🔍 (**Select**) to select a different offer.

   e. Enter the necessary data on the **Key Contract Data** tab, e.g. the start and end of the contract, its duration, the currency and the billing cycle.

   f. Enter the pro-active service cycle in the **Service Level Agreement** tab, the agreed response times and the last service date.

   g. Enter a description of the status on the **Last Service Status** tab.

4. Save the record.

5. Add items to the service contract, >> Adding Service Contract Items on page 585.

Adding Service Contract Items

Usually, a service agreement item is added for each product the service agreement covers.

If you create a service offer from the service contract, the service contract items where the **Inactive** check box is disabled (this option is not available by default) are **not** copied to the service offer. All participants entered for the service contract items are also transferred to the service offer, >>

To add a service contract item:

1. Switch to the desired service contract.

2. Click on ⊕ (**New**) on the **Service Contract Item** tab.

3. Enter the service contract item's details, e.g. the item number, product group, quantity, price etc.

4. Save the record.

Linking Service Contract Items to an Installed Base

You can link an installed base to service contract items. If a ticket is added for the linked installed base, the system recognizes that a service agreement was concluded for it. You can then create a service agreement offer starting from the ticket that is based on the service agreement.

To link an installed base to a service contract item.

1. Switch to the desired service contract:

2. Click on ⊕ (**New**) on the **Service Contract Item** tab.

3. Click on 🔍 (**Select**) next to the **Link** field and select the installed base you want to link the service contract item to.

4. Save the record.

   The service contract item is linked to the installed base.

Creating Service Offers

You can create service offers from tickets and service contracts that are based on a service contract. The service contract items are added to the offer as offer items. All active participants are also transferred. You can subsequently delete the participants and items that are automatically copied to the service offer.

In order to create a service offer from a ticket containing data from the service contract, both the service contract item and the ticket must be linked to the same installed base (**Link** field).

To create a service offer based on a service contract:

1. Switch to the service contract, >> Adding a Service Contract on page 584.

2. Switch to the **Service Offers** and click on ⊕ (**New**).

3. A new service offer is created. The active service contract items and participants are copied to the service offer.

Note: An item is active if the service contract item and participants are set as active (i.e. the **Inactive** check box is disabled). Note that this field is **not** available by default.

A message is displayed that the service offer has been created and the offer number (**PR-SerNo.** field) is entered in the service offer and provides a link to to the offer.

4. Click on the link in the message to switch to the service offer.

   If the message is no longer displayed and you wish to switch to the service offer, the message can be found in your **Inbox** in the **System** tab.

5. If necessary, you can edit the service offer.

6. If the customer accepts the offer, you can select **Copy to Order** from the offer's context menu to create an order based on the service offer.

To create an service offer from a ticket:

1. Switch to the ticket.

2. Click on ⊕ ▮ (**New Service Offer**) on the **Offer** tab or select **New** > **New Service Offer** from the context menu.

   The system checks whether a service contract exists for the linked installed base:

   • If no service contract exists, the mask used to add a new record is displayed, and you need to enter the service offer's details and items.

   • If a service contract exists, a new service offer is created based on the service contract.

   • If several service contracts exists, they are listed and you can choose which one to base the offer on.

3. Save the record.

   The new record is matched up when you save it, >> Adding Service Contract Items on page 585.

Displaying Hierarchies

You can define hierarchies for tickets, installed bases and tasks. For example, you can divide tasks up into sub-tasks and add sub-tickets to tickets.

You can add these child records in these info areas from the parent record. An installed base may consist of several individual parts that depend on the main entry, e.g. in the case of industrial plants with several production lines. When dealing with customer problems, a further problem may occur for an existing ticket that will be solved together with the existing issue.

The child records are linked to the parent record using the **Predecessor** field.

These hierarchies can be displayed in a tree.

Within the tree, you can add further child records for any of the entries using the context menu, or edit existing records.

If more than one customer notifies you of a problem, resulting in more than one ticket for the same problem that are subsequently linked with each other, these related tickets are also displayed in the tree.

To display the hierarchy for a record:

1. Switch to the record you wish to display the hierarchy for.

2. Click on ▶ (**Hierarchy Tree**) in the record's header or select **Hierarchy Tree** from the record's context menu.

   The hierarchy tree is displayed. The record that you opened the hierarchy tree from is color-coded, and the hierarchy tree displays all records linked to that record in the hierarchy.

3. Click on a record in the tree to display the record in the area on the right and to edit it.

Rep Skills

Rep skills are defined by your administrator. These qualifications can be taken into account when assigning tickets, >> Dispatching on page 588. You can use the dispatching dashboard to create appointments for reps based on their skills, in order to process tickets.

To search for specific rep skills:

1. Select 📦 (**Products & Service**) > **Rep Skills**.

The search mask is displayed.

2. Enter your search criteria and click on **Start Search**.

All reps that possess the qualifications you are searching for are listed.

3. Double-click on an entry to display the rep skills.

Dispatching

You can dispatch service duties to reps (e.g. service employees), and take the availability and skills of employees into account while doing so.

To create an appointment for a rep as part of a ticket:

1. You can accessing the dispatching function in two ways:

- Select ▨ (**Products & Service**) > **Dispatching Dashboard** from the application menu and select a ticket.

  If you wish to limit the tickets listed, click on ❤ (**Show/Hide**) to the right of the header. The search mask is displayed and you can define search criteria. The tickets listed can also be restricted by your administrator.

  Accessing the dispatching dashboard in this way allows a dispatcher to plan appointments for field reps.

- Click on ▨ (**Dispatching Dashboard**) from within a ticket. In this case, only this ticket is listed.

  Accessing the dispatching dashboard in this way allows helpdesk members to arrange an appointment with the customer when adding the ticket.

2. The resource view is displayed below the tickets, >> Resources on page 273.

3. In addition to the default functions in the resource view, the following options are available:

- Select the **Skill** option under **Group reps** to group reps by skill in the overview.

- Enable **Ticket-Related Reps** to display the reps with the skills required to edit the ticket. When enabled, enable the **Combine Skills & Rep Set** option and select a rep group from the **Reps and Rep Sets** drop-down list to combine the two options. In this case, only those reps are listed who are assigned to the selected group **and** have the necessary skills.

    Note: If you disable **Ticket-Related Reps** again while **Combine Skills & Rep Set** is active, the reps selected in the **Reps and Rep Sets** window continue to be displayed.If you select multiple tickets, only those reps who possess the skills necessary to handle the ticket are displayed.Which tickets require which skills is defined in Aurea CRM win (**Configuration** info area, category: **Resources**; option: **Dispatching**).

- You can also display resources required for service tasks, such as special equipment, and schedule a service appointment based on their availability. Resources are displayed beneath the reps and use the same sort order and

grouping as reps. The **Ticket-Related Reps** option also applies to resources; if enabled, only those resources with the skills assigned to the ticket are listed.

- Drag the ticket to a free time slot to create an activity for the corresponding rep. The appointment is automatically linked to the company or person entered in the ticket. The due date and time are displayed using a vertical red line while dragging the ticket. Depending on your configuration, the ticket may be removed from the list of tickets once an activity has been added.

- You can select multiple tickets in the resource view and drag them to a rep. In this case, an activity is added for each ticket.

- If you select a ticket in the list of tickets, all activities linked to this ticket (or a ticket in the ticket hierarchy) are highlighted. If you select an activity in the calendar, all other activities linked to the same ticket (or a ticket in the same hierarchy) are highlighted:

> **Note: Administrator Information:** Tickets added in Aurea CRM web prior to version 8.2 do not contain the information necessary to display related records within the same hierarchy. You can enter this information automatically using a CRM.server To-Do, >> To-Do Types in the *CRM.core Administrator Guide*.

- If multiple service employees are involved in processing a ticket, select the activity, click on (**Duplicate Record**) in the header to add a copy of the activity and drag the copy to the desired rep. You can also hold down Ctrl while dragging the activity to the desired rep to create a copy.

New activities are added for the company/person the ticket was added for and are linked to the ticket. The ticket's subject is transferred to the activity. The duration of any activities you add is determined by the **Service duration** field in the ticket. If you wish to add an activity with a different duration, enter the **Duration** under **Activity Defaults**, >> Daily and Weekly Planning on page 270.

> **Note:** Additional fields can be transferred from the ticket to the activity, >> Aurea CRM web DispatchingDashboard in the Administrator Guide.